

Estonia: Broadband markets

Estonia has a take-up of fixed broadband below the average and should foster further the investment in infrastructure in order to increase the availability of fixed broadband. At the same time, Estonia does considerably better than other European countries regarding the availability of 4th generation mobile broadband. Take-up of mobile broadband is also well above the European average.

In 2012, standard fixed broadband covered 87.8% of homes in Estonia (95.5% in the EU). At the same time, Next Generation Access capable of providing at least 30 Mbps download was available to 61% of homes (53.8% in the EU).

In January 2013, the incumbent operator had a market share well above the European average (59.5% as opposed to 42.3% in the EU). DSL was the most common technology to provide broadband access, even though NGA broadband connections accounted for a significant part of the market.

The take-up (subscriptions as a percentage of population) of fixed broadband was 27.2% in January 2013, just below the European average of 28.8% and 0.1 p.p. higher than in 2012. The share of high speed connections (at least 30 Mbps) was lower than average (12.1% compared to 14.8% in the EU), but ultra-fast connections accounted for 3.6% of all subscriptions (3.4% in the EU).

On the mobile side, third generation mobile broadband (HSPA) was available to 87% of population in 2012 (96.3% in the EU). Meanwhile, Estonia had one of the highest availability of 4th generation mobile broadband (70% as opposed to 26.2% in the EU). The take-up rate (subscriptions as a percentage of population) of mobile broadband was 76% in January 2013, well above the average of 54.5% in the EU.