

Digital Single Market

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2012 Report on e-communications and information society in Enlargement countries

This study covers market developments in the electronic communications and information society sectors in the nine enlargement countries of the EU: Albania, Bosnia & Herzegovina, Croatia, Iceland, Kosovo, Montenegro, FYROM, Serbia and Turkey. It furthermore assesses the progress of each country in adopting the EU regulatory framework and aligning national ICT/information society policies with the goals and priorities of the DAE.



While the general economic outlook remains weak, the e-communications market in the nine enlargement countries grew by 5.7% to a total value of €16.07 billion in 2011. The strongest growth rate of 23.2% took place in internet services - accounting for almost 13% of the total value of the sector - followed by cable TV services, achieving 9.5% growth. Mobile communications, which represents 60% of the market, grew by 7.6%.

The total number of fixed broadband lines grew by almost one million lines in 2011, reaching a total of around 10.6 million connections, which translates to an average penetration rate of almost 11%. The incumbent's market share remains high in most markets.

The degree of alignment of national e-communications and information society legislation with the EU rules varies considerably between the nine countries, so that the highest level of harmonisation, comparable to the EU Member States, has been achieved by Iceland and Croatia.

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