



Convergence in electronic communications and regulatory challenges-Albania

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Content

How much a reality in Albania?

Mobile/fixed convergence

Regulatory challenges

Definition of “Bundles”

- EC (implementation report):

*'Bundled offer' means a commercial offer of a single operator which includes two or more services such as fixed and mobile public telephony services, access to TV programmes and broadband internet access, **offered for a single price and as part of one bill.***

NRA-s however may use different definitions, (so the figures shown in this report are not always comparable).

Bundle offers in Albania

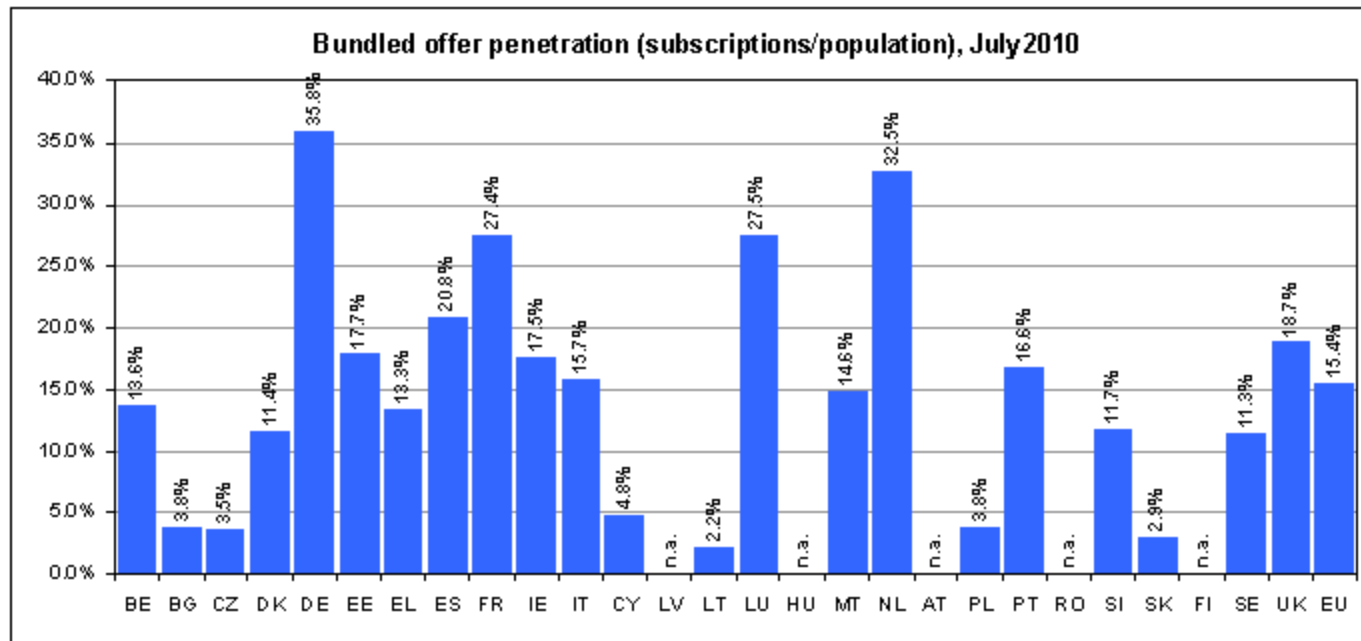
- Fixed telephony and broadband Internet
- Fixed telephony, broadband Internet and TV
- Fixed and mobile telephony
- Billing/prices:
 - ◆ The same or separate bill/prices

Double/Triple play(1.07.2011)

	Total number	As % of fixed lines	As % of population
Broadband Internet and Fixed Telephony	88,302	26.8%	2.8%
Broadband Internet, Fixed Telephony and TV	1,137	0.3%	0

Bundles in EU

Figure 80: Bundled offer penetration, July 2010



Duble/triple play offers

- Tripple play (one price): Abcom
- Double play (one price): Albtelecom

ABCOM 3N1

- Internet+Television+Telephony:
 - ◆ One cable/one Bill.
- Includes:
 - ◆ TV: DIGITALB
 - ◆ Interneti 1 Mbps.
 - ◆ Telephony (3.5 Euro call time included)
- *17.5 Euro/month (VAT inc)*

Albtelecom

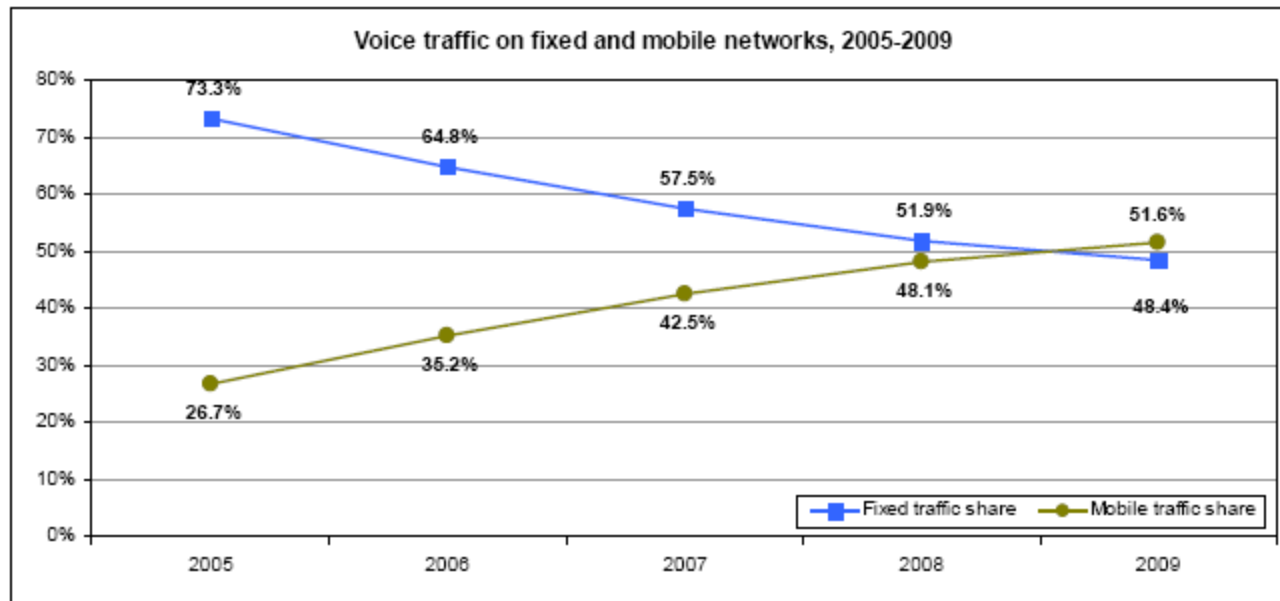
- i+Fiks
 - ◆ 2mbps Broadband (8gb limit or no limit)
 - ◆ 1000-1500 On net call minutes
 - ◆ 1999 -2999 lek/month (VAT excl.)

Mobile and Fixed telephony

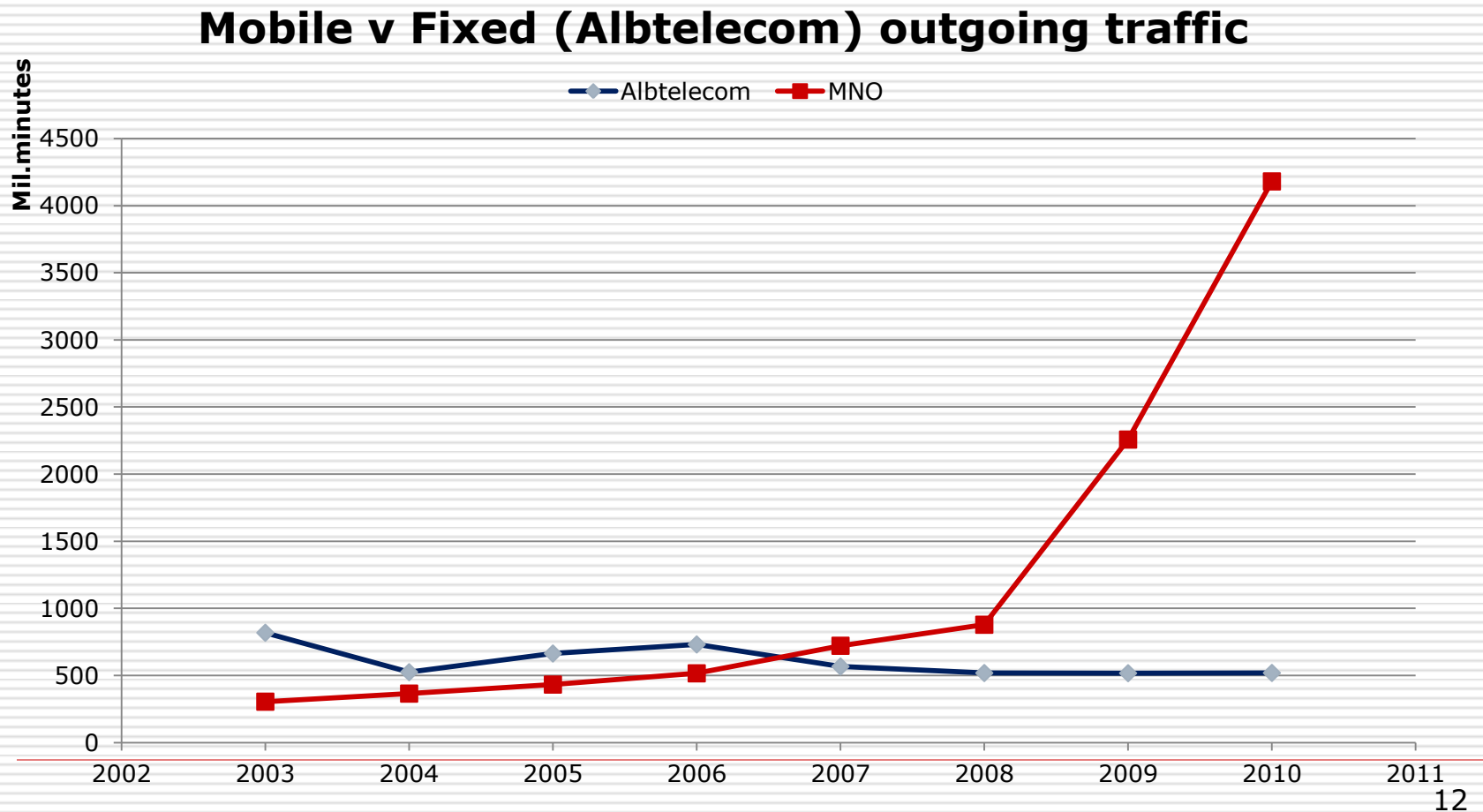
- Vodafone Albania:
 - ◆ Vodafone Home
 - ◆ Mobile Number in a fixed handset
 - ◆ Take up: limited
- Eagle Mobile/Albtelecom:
 - ◆ Combined service with fixed numbers
 - ◆ Trial/test
- AMC
 - ◆ Fixed telephony with fixed numbers
 - ◆ GSM network

Fixed mobile convergence: outgoing traffic (EU level)

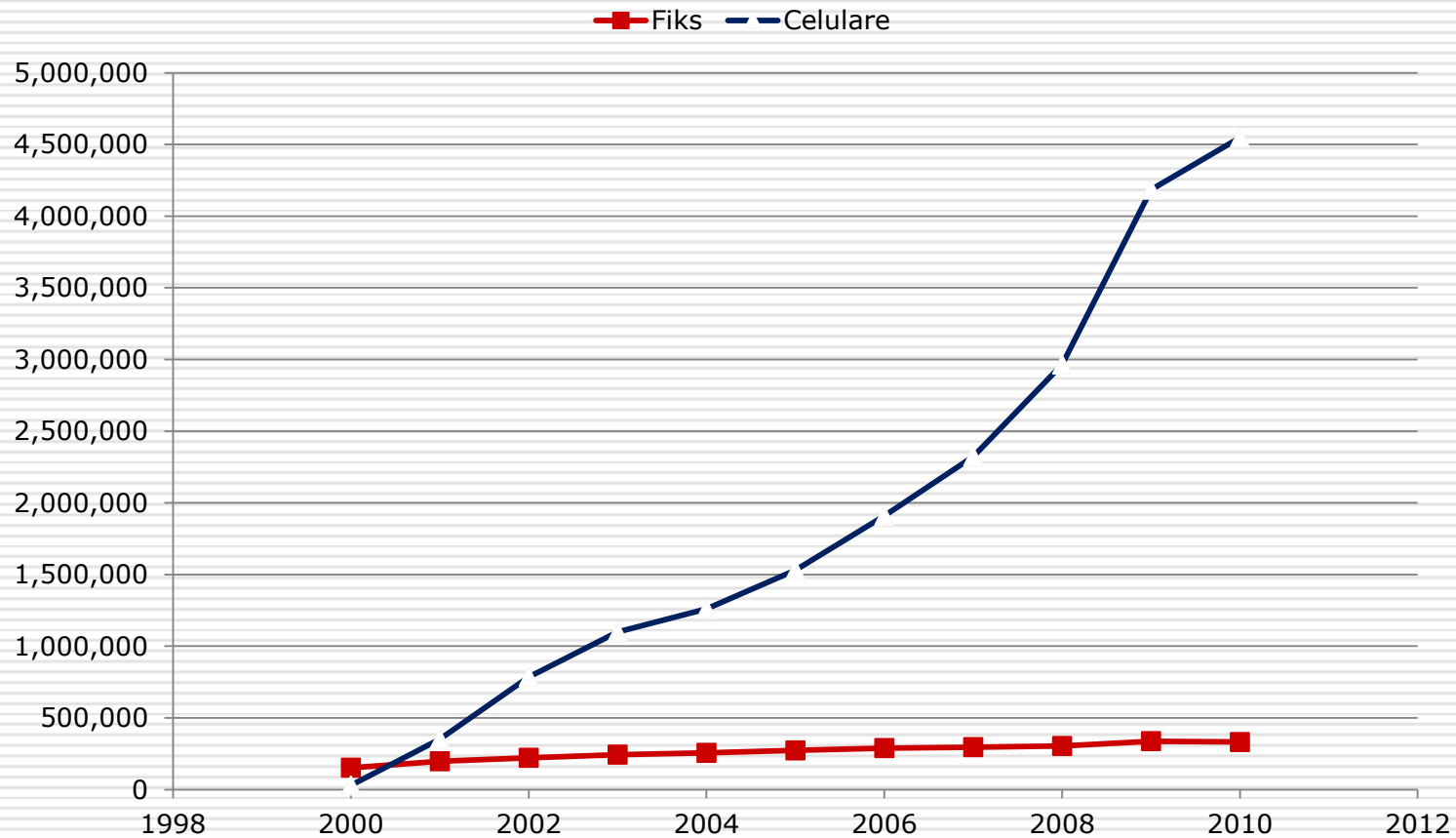
Figure 17: Voice traffic on fixed and mobile networks at EU level, 2005-2009



Fixed mobile convergence: outgoing traffic (Albania)



Mobile and Fixed telephony users



Regulatory challenges

Market definition

Termination charges

Market definition

- Retail calls market:
 - ◆ mobile and fixed same market?
 - ◆ Substitution always present
 - ◆ Same market only for close substitutes
 - ◆ Prices:
 - of on-net (closed user groups) mobile very competitive with local/national fixed calls
 - International mobile calls still much higher than fixed international

Market definition

- Access:
 - ◆ Access form fixed and mobile same market?
 - ◆ Mobile access could also be considered fixed
 - ◆ EC recommendation 2007: access from fixed location still a relevant market for ex-ante possible regulation
 - ◆ Substitution: demand and supply

AKEP role

- Market definition:
 - ◆ Albtelecom claims for same retail markets (mobile and fixed)
 - ◆ Not taken in consideration in last market analysis (no close substitutes)
 - ◆ Review: next round of market analysis
- Termination charges:
 - ◆ AMC and Albtelecom: negotiating on AMC fixed telephony termination charges

Thank you

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