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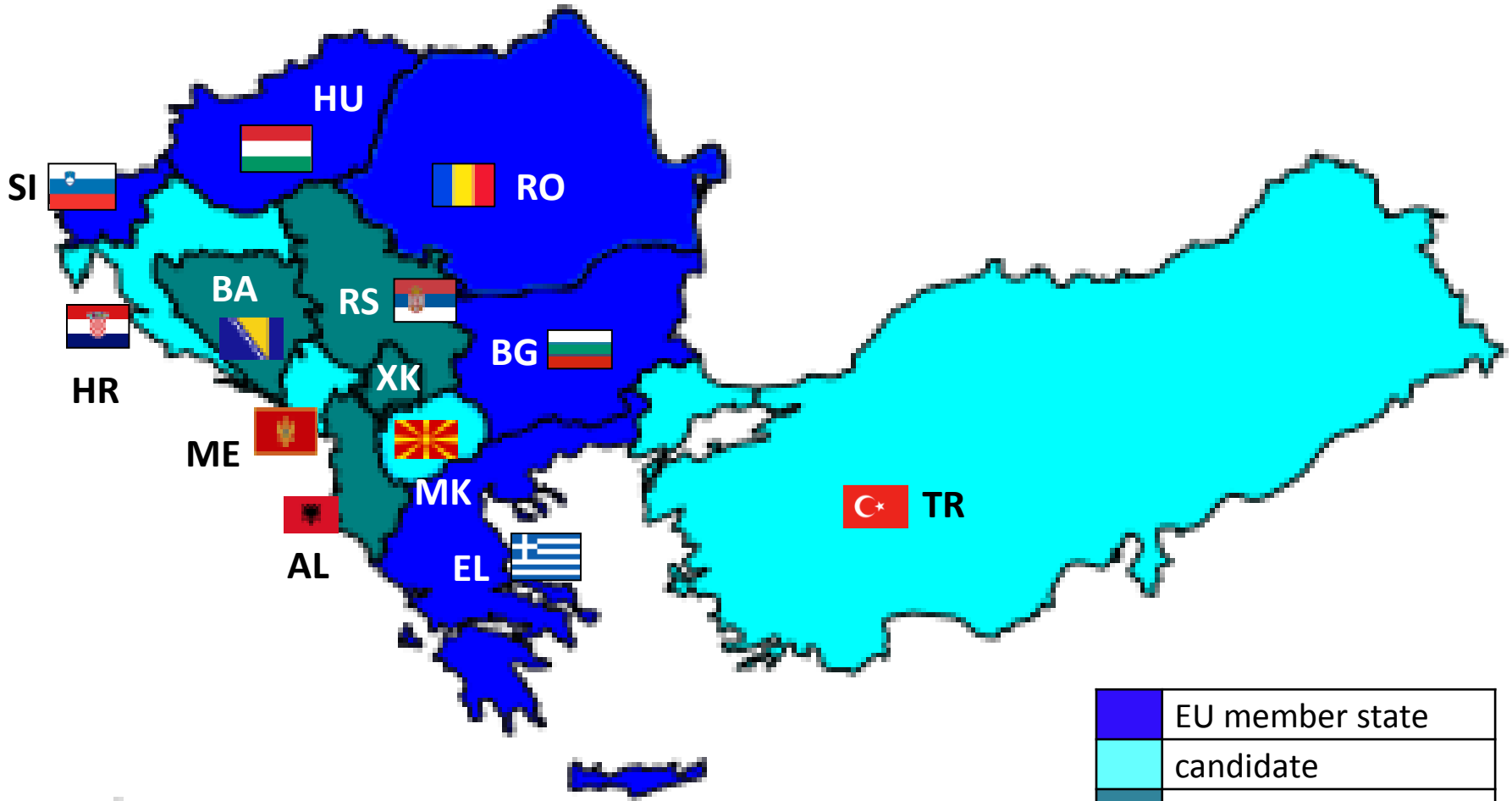
# Digital Agenda for South East Europe




Setting the scene...

Brussels – December 13, 2011

Veronica Bocarova, Cullen International

# South East Europe at a glance...

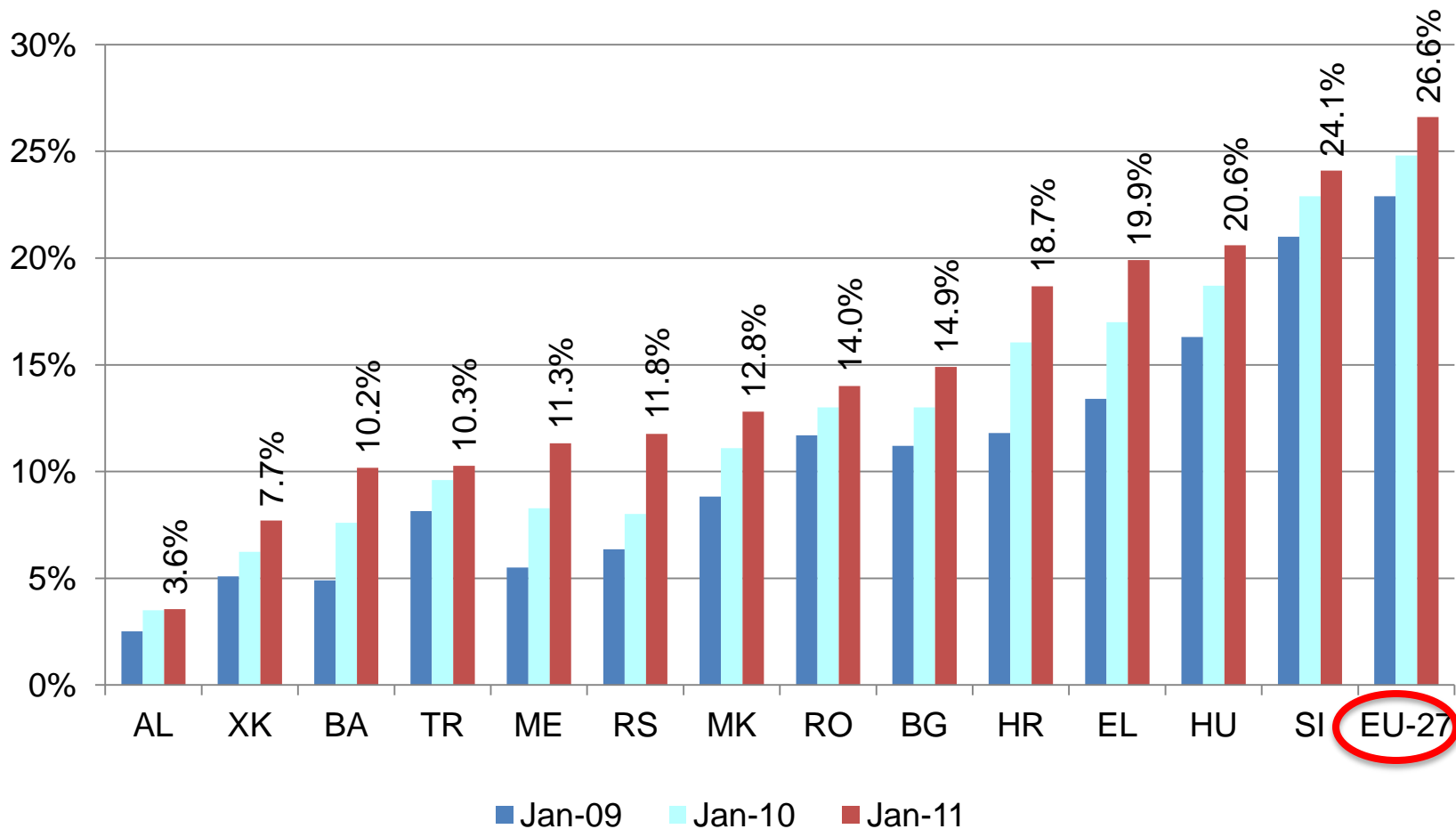


	EU member state
	candidate
	potential candidate

# Fixed broadband

# Fixed broadband – penetration rate

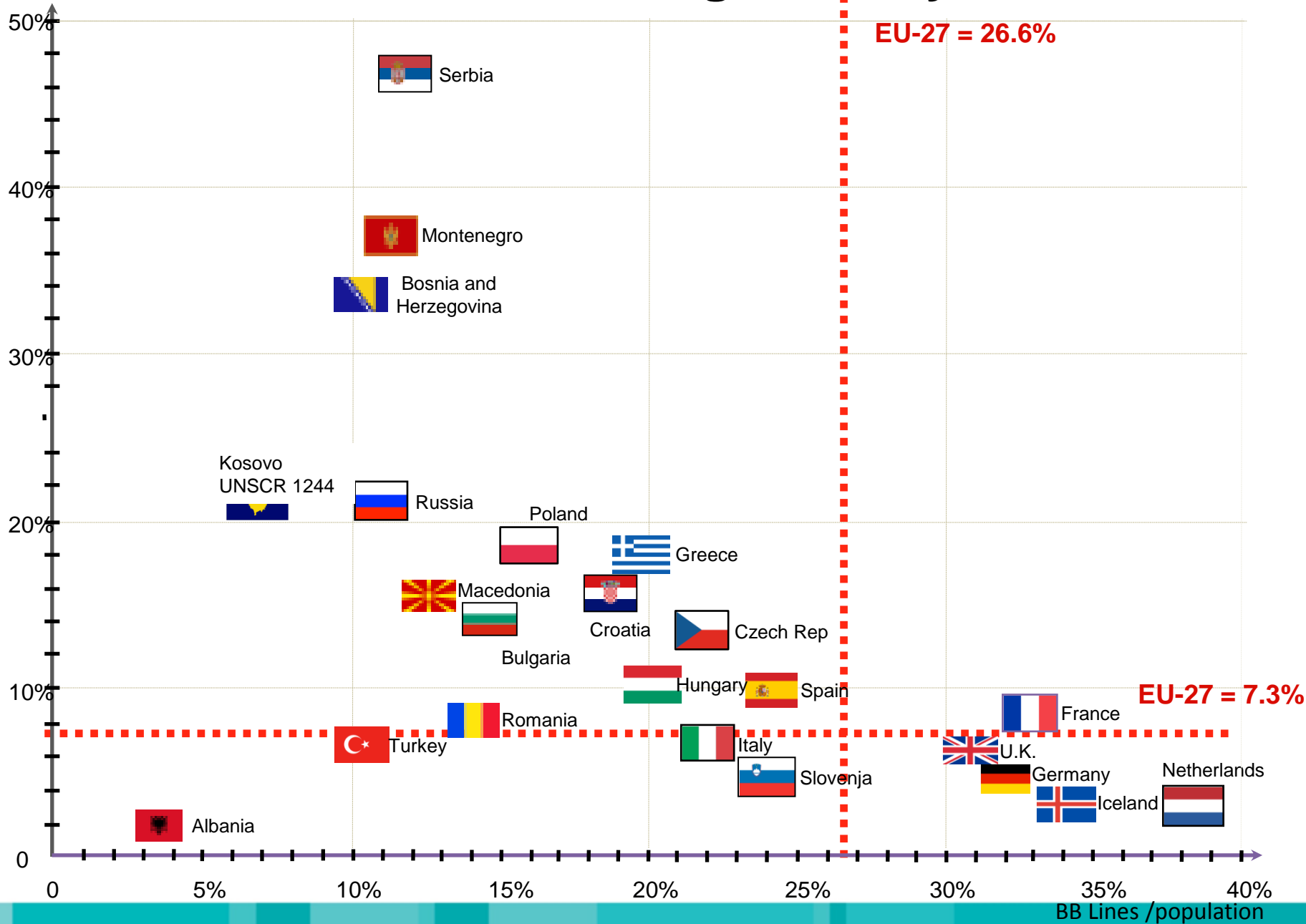
BB lines/population



Source: CI, Digital Agenda Scoreboard 2011

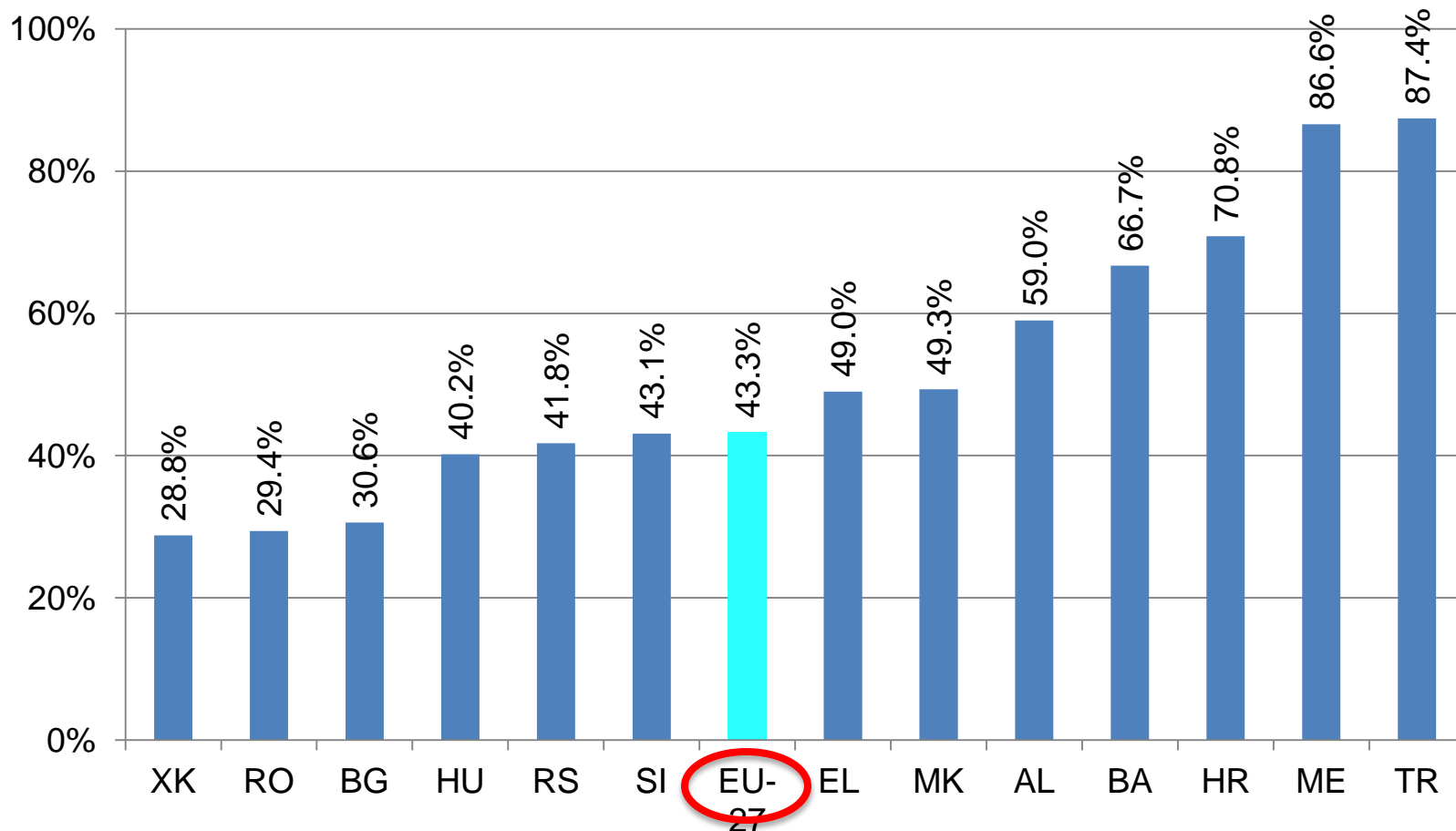
Penetration Growth  
(2010/ 2011)

# Fixed broadband - growth dynamics



# Fixed broadband – incumbents' market shares

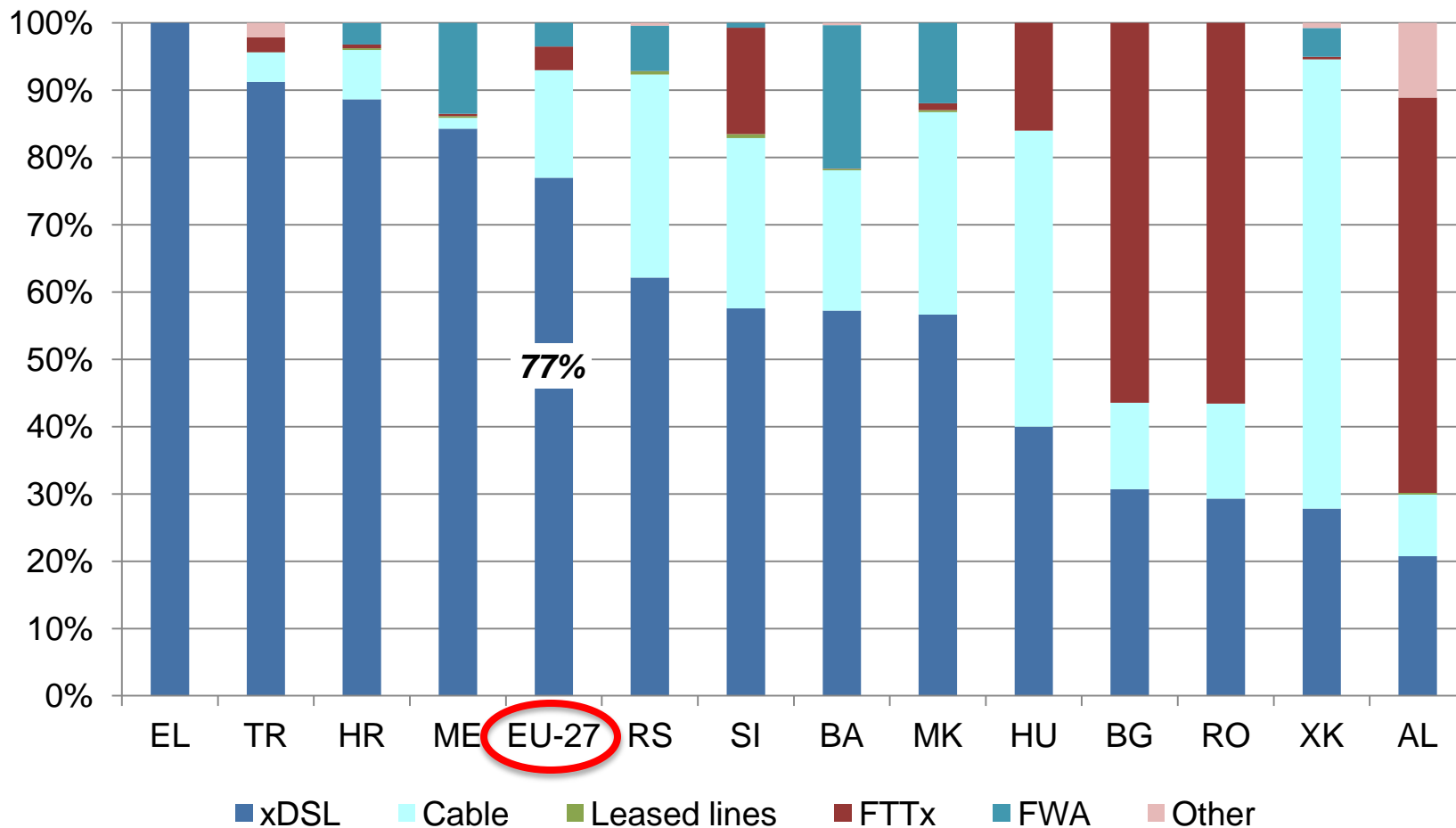
By number of lines, January 2011



Source: CI, Digital Agenda Scoreboard 2011

# Fixed broadband – market shares by technology

By number of lines, January 2011



Source: CI, Digital Agenda Scoreboard 2011

# Fixed broadband – market shares in xDSL

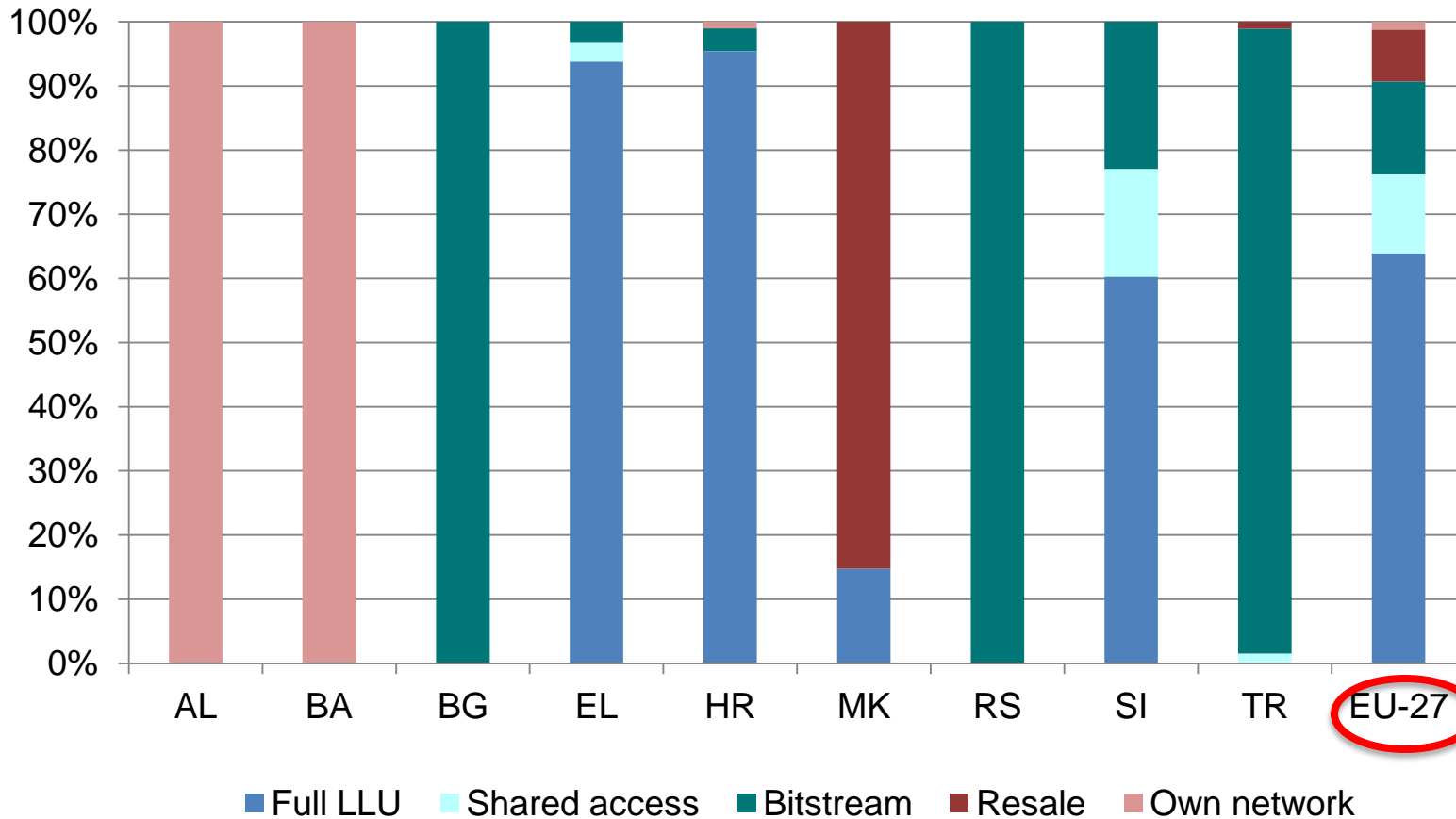
By number of lines, January 2011



Source: CI, Digital Agenda Scoreboard 2011

# Fixed broadband – new entrants' xDSL lines by type of access

By number of lines, January 2011

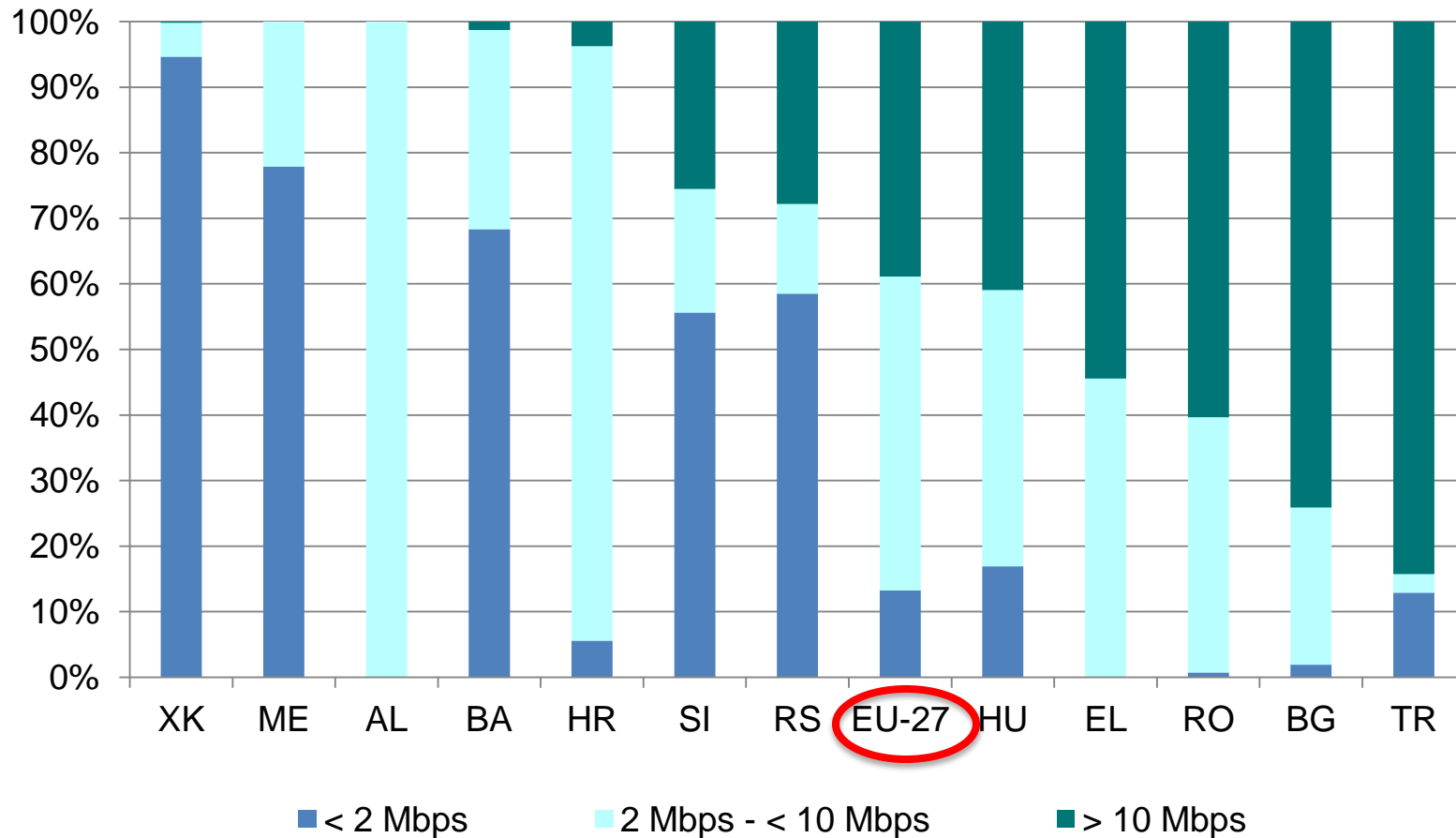


RO, ME, XK – no alternative xDSL offers

Source: CI, Digital Agenda Scoreboard 2011

# Fixed broadband – download speeds

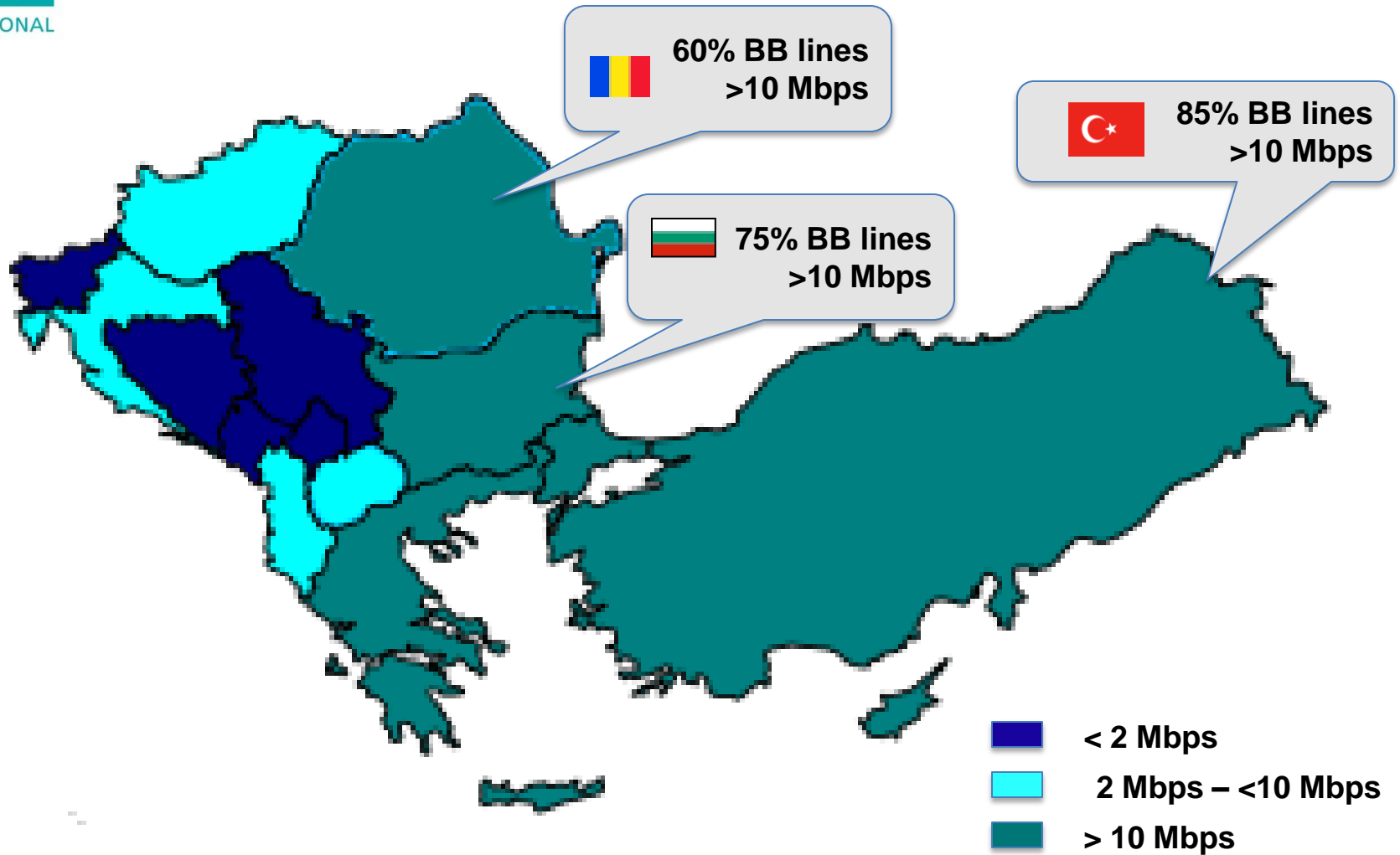
By number of lines, January 2011



MK – exact data not available

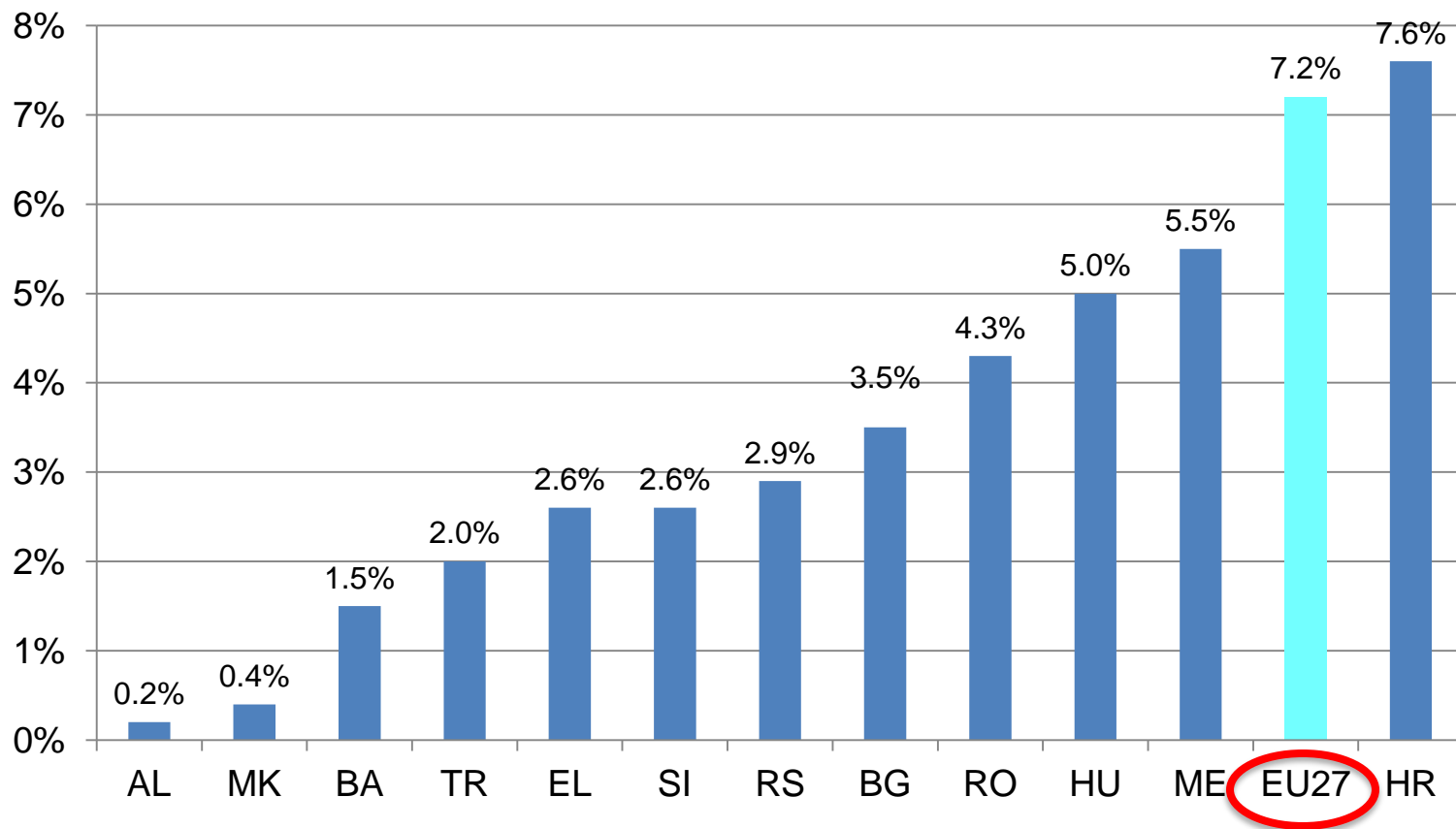
Source: CI, Digital Agenda Scoreboard 2011

# Fixed broadband – download speeds



# Mobile broadband

# Mobile broadband – dedicated data cards penetration



XK – no mobile BB offerings

Source: CI, Digital Agenda Scoreboard 2011

# Mobile spectrum assignments

4 MNOs:

3 – 900 & 1800 & 2100 MHz  
1 – 2100 MHz



4 (6) MNOs

3 – 900 & 1800 & 2100 MHz  
1 – 2100 MHz  
2 – 400 MHz



3 MNOs:

900 & 1800 & 2100 MHz

4 MNOs:

2 – 900 & 1800 & 2100 MHz  
2 – 900 & 1800 MHz



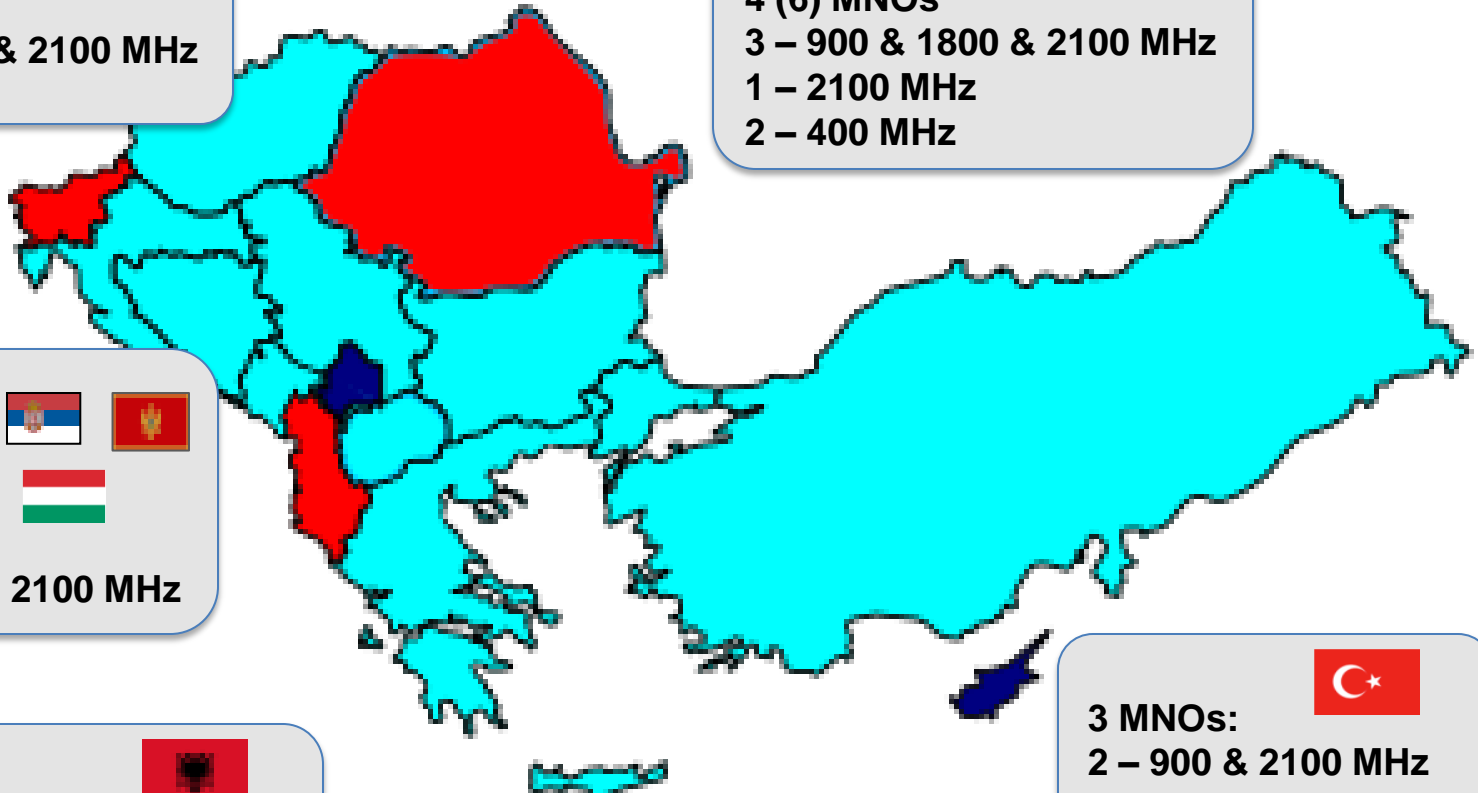
3 MNOs:

1 – 900 & 1800 & 2100 MHz  
1 – 900 & 2100 MHz  
1 – 900 & 1800 MHz

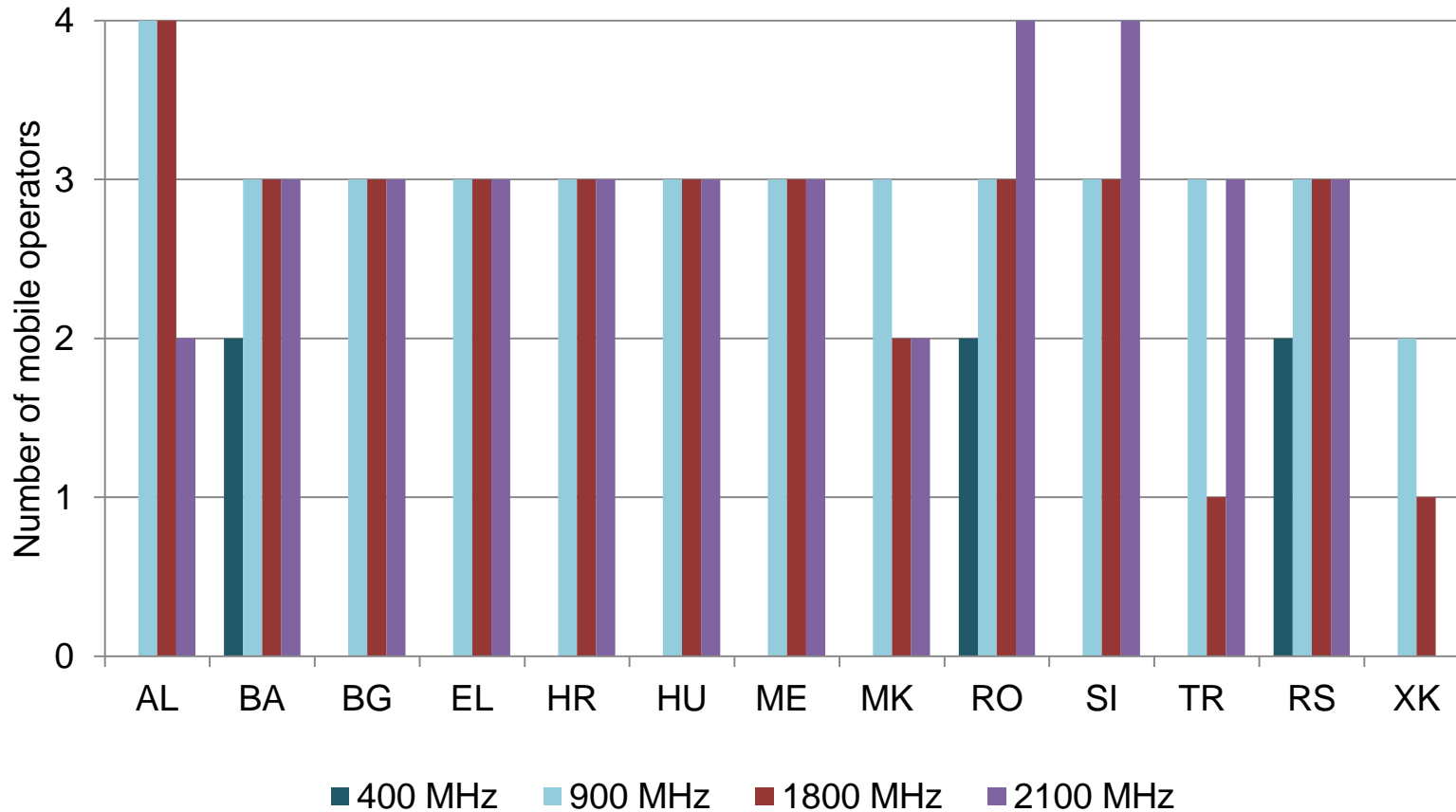


3 MNOs:

2 – 900 & 2100 MHz  
1 – 1800 & 2100 MHz



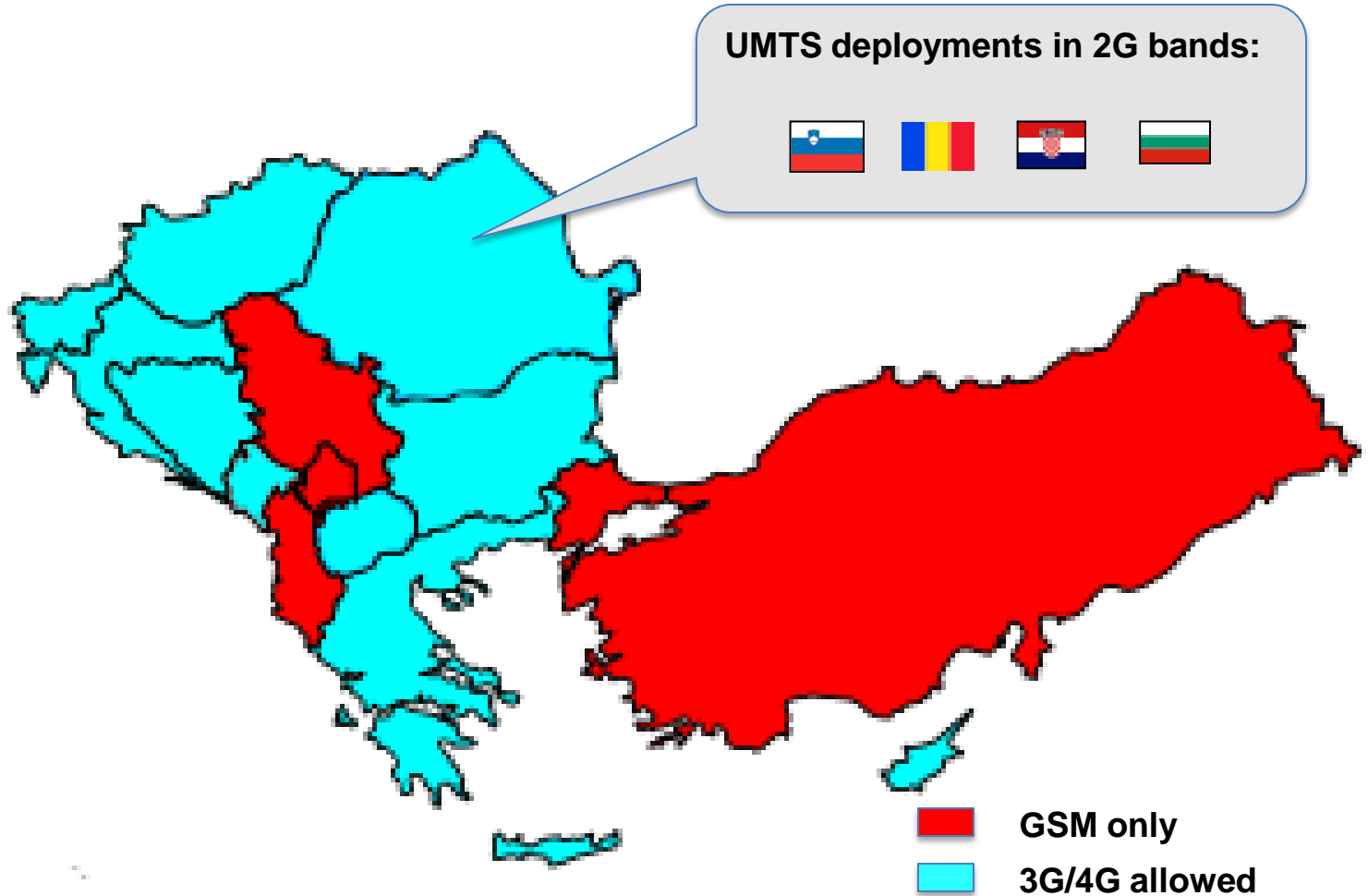
# Mobile spectrum assignments



RS – 400 MHz fixed voice and data only

Source: CI

# Refarming of 2G spectrum for 3G/4G



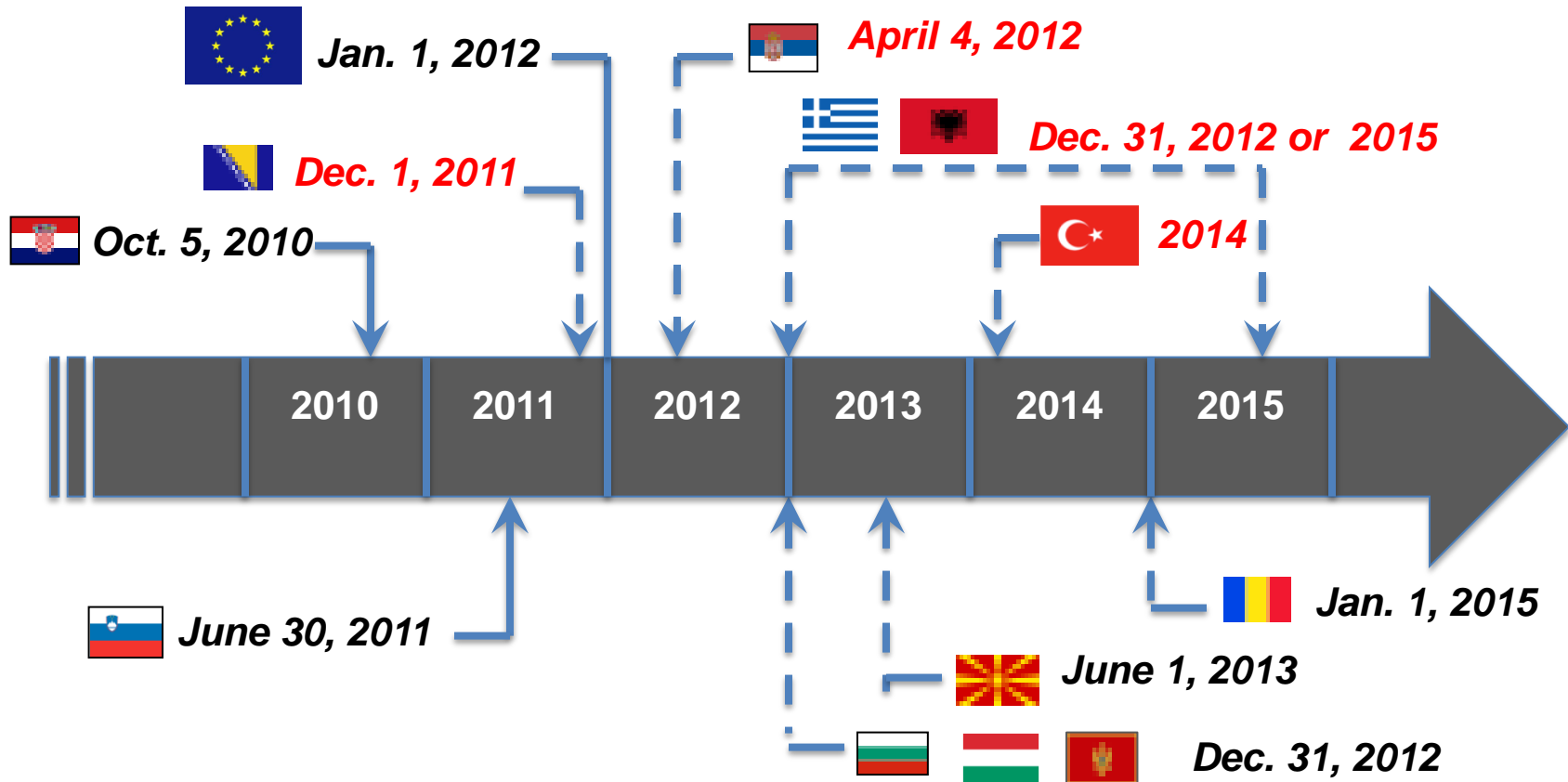
# Digital dividend - 800 MHz mobile broadband

*RSPP proposal:*



*To carry out authorisation process for wireless BB by Jan. 1, 2013*

*Analogue switch-off dates:*

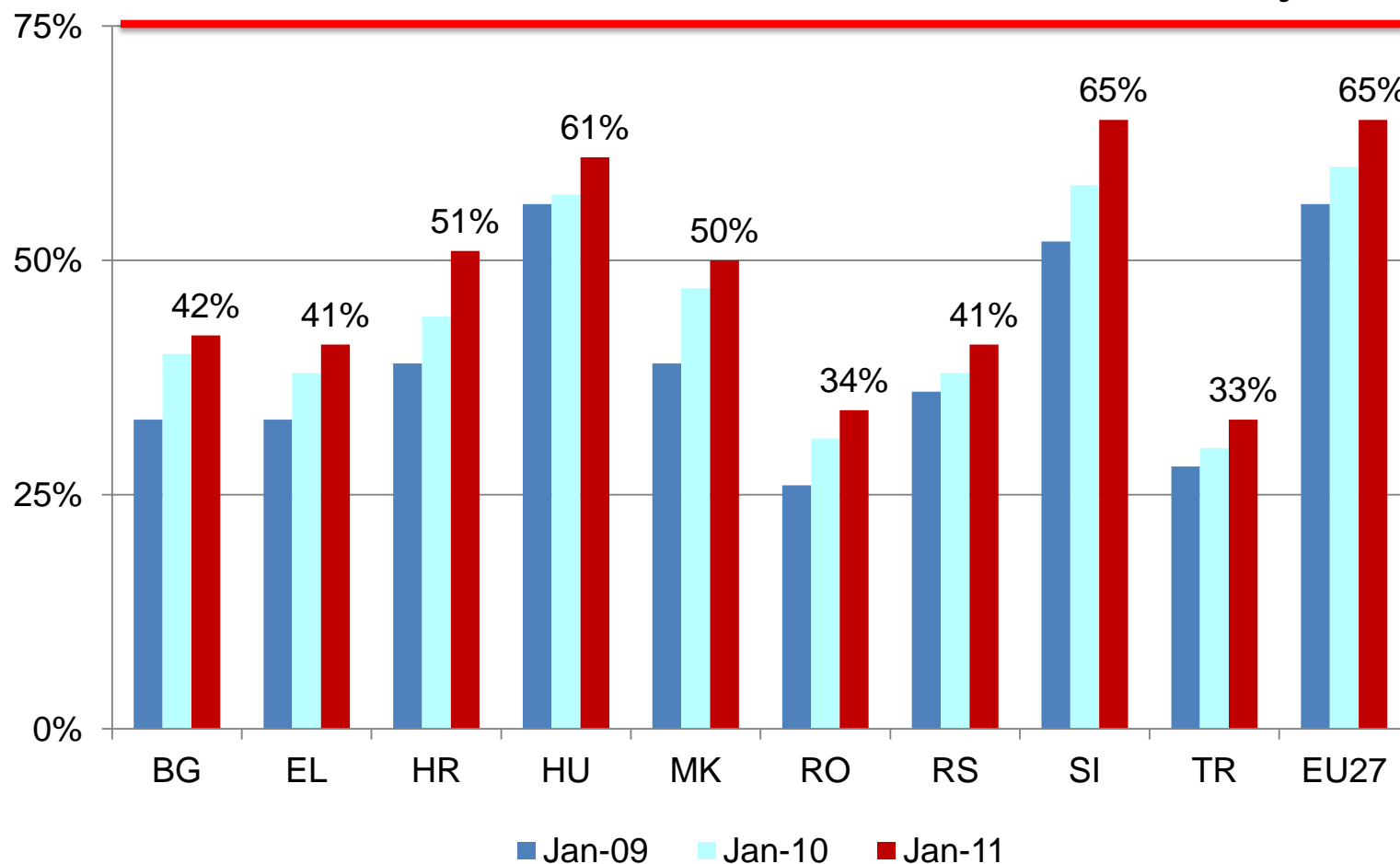


# End-user demand aspects

# Regular internet users

as % of population

**DAE – 75% by 2015**

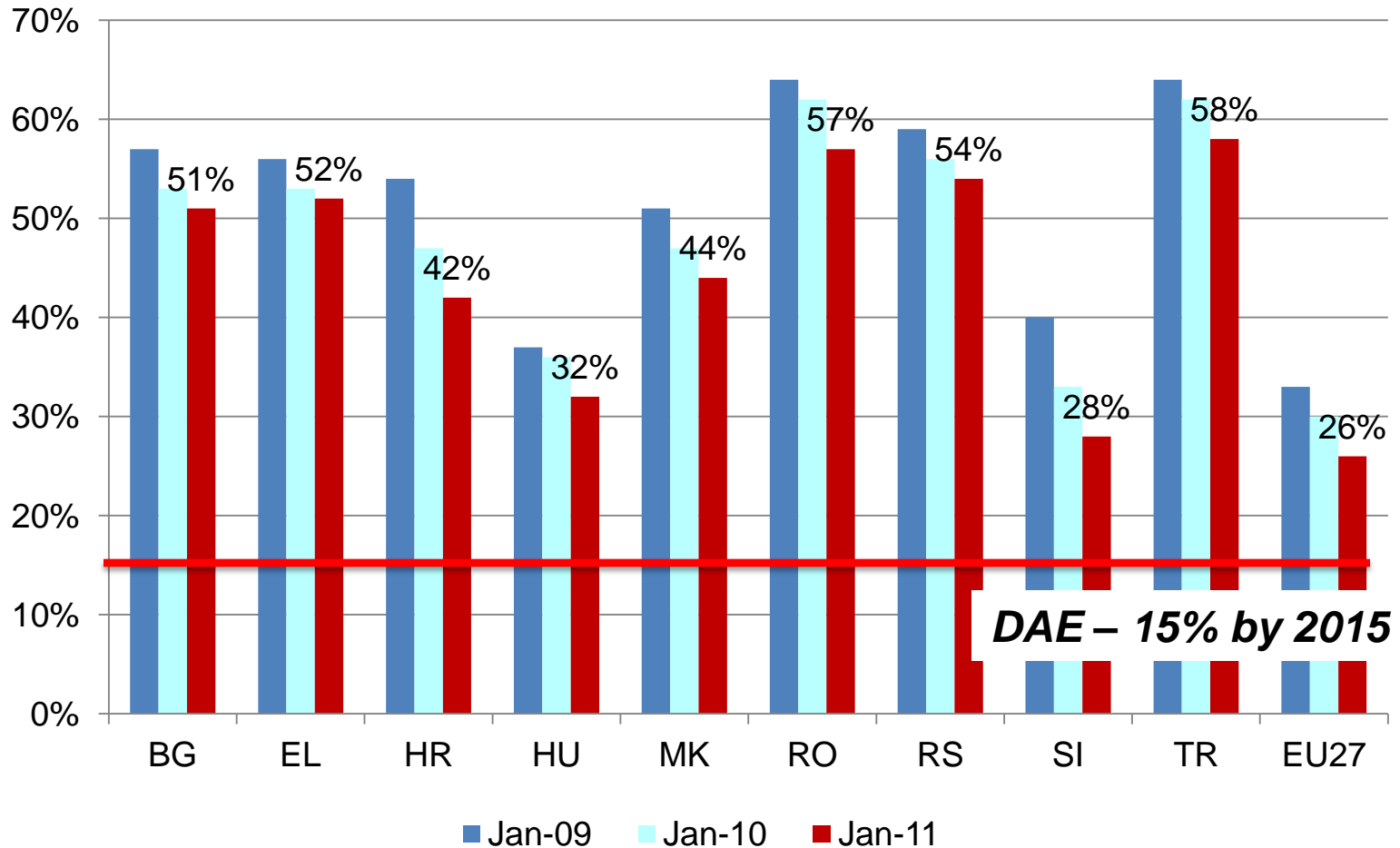


AL, BA, ME, XK - data not available

Source: Eurostat

# Individuals that never used internet

as % of population

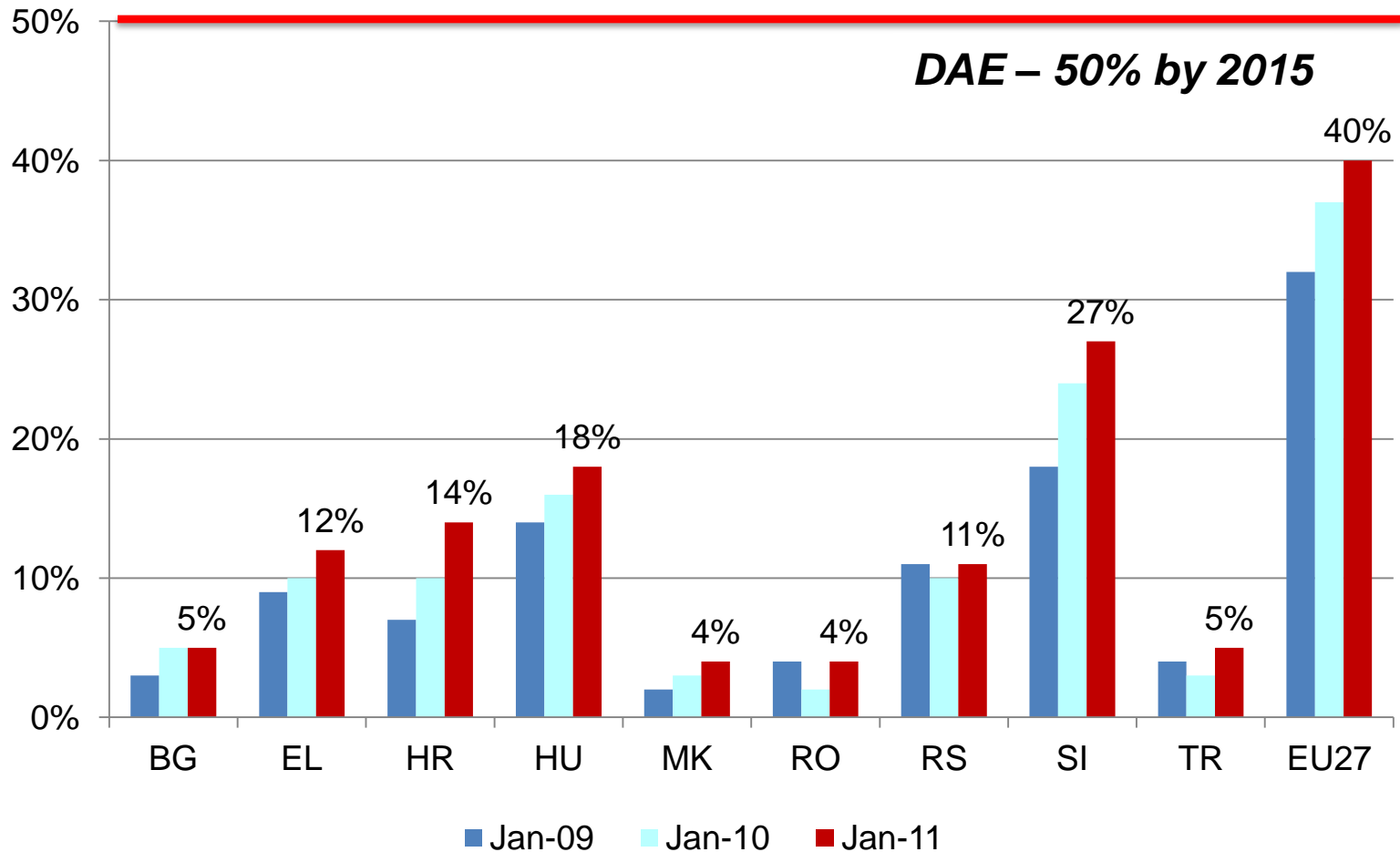


AL, BA, ME, XK - data not available

Source: Eurostat

# Individuals buying online

as % of population

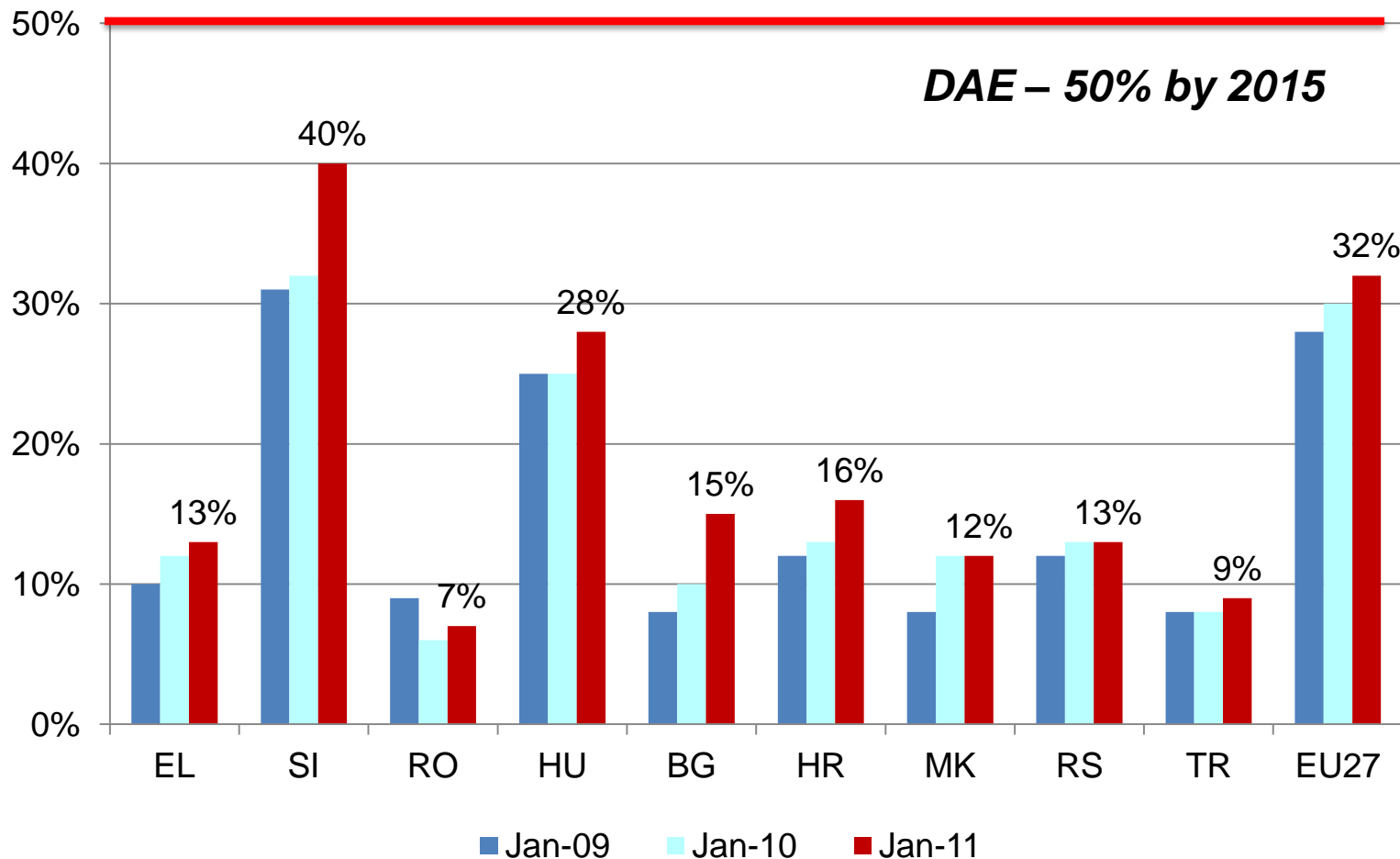


AL, BA, ME, XK - data not available

Source: Eurostat

# Use of internet for interaction with public authorities – eGovernment

as % of population








AL, BA, ME, XK - data not available




Source: Eurostat

# Policy perspective

# National broadband targets

	Speed	Coverage	Year	USO or policy
	basic BB	100% population	2013	DAE
	30 Mbps+	100% population	2020	DAE
<b>EU</b>	100 Mbps	50% HH subscribed	2020	DAE
	20 Mbps	80% HH big cities		
	10 Mbps	90% population middle cities	2013	BB strategy
<b>BG</b>	10 Mbps	90% population rural areas		
	2 Mbps	90% population	2013	
<b>HR</b>	30 Mbps+	50% population	2020	BB strategy
	2 Mbps	100% population	2013	
<b>HU</b>	20 Mbps	65% HH	2014	BB strategy
	144 kbps+	100% population	2012	USO
<b>RO</b>	1 Mbps+	80% HH	2015	BB strategy

# National broadband targets

	Speed	Coverage	Year	USO or policy
	2 Mbps	98% population	2012	
<b>SI</b>	20 Mbps	90% population	2015	BB strategy
	basic BB	20% population	2012	BB strategy
<b>RS</b>				
	144 kbps	100% population	2011	USO
	10 Mbps	50% population	2014	<i>draft</i>
<b>ME</b>	10 Mbps	100% population	2016	<i>BB strategy</i>
	30 Mbps	50% population	2016	



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**Monitoring of electronic communications  
in the Enlargement countries**

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