



NATIONAL BROADBAND STRATEGY IN THE REGION OF CENTRAL AND SOUTH EAST EUROPE

(overview, market structure, challenges, recommendations)

Boris Jevrić

Agency for Electronic Communications and Postal Services of Montenegro

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DAE 2020



- The significance of broadband development and its importance for a network knowledge-based society have been recognized by the “Europe 2020” strategy.
- Digital Agenda for Europe (DAE) set 13 specific goals.
- **The most important goals of DAE are:**
 - the entire EU to be covered by broadband above 30 Mbps by 2020
 - 50 % of the EU to subscribe to broadband above 100 Mbps by 2020
- **Development of broadband Internet access is based on the following principles:**
 - Technological neutrality of networks and services;
 - Broadband access as a universal service and
 - Development of next-generation networks.



PLANS AND STRETEGIES



- Region of Central and South East Europe:
 - Albania, Austria, Bosnia and Herzegovina, Bulgaria, Croatia, Czech Republic, Estonia, Greece, Hungary, Kosovo*, Latvia, Lithuania, FYR Macedonia, Montenegro, Poland, Romania, Serbia, Slovakia and Slovenia.

** (under UN Secretary Council Resolution 1244/99)*



RESUME



- National plans and strategies vary from country to country, but the **following common features can be noticed**:
 - Plans and strategies are ambitious and relate to the period of three to five years for basic broadband access, and seven or more years for fast and ultrafast broadband access;
 - Goals are set in relation to the coverage of certain percentage of population i.e. households with broadband access of specific or minimum speed;
 - Almost all strategies and plans are in line with DAE goals, and for the purpose of achieving these goals, very important is the introduction of new generation networks, using technology of optical fibre based on FTTx standard in fixed communications network, and the allocation and use of available radio-frequency spectrum for the development of mobile communications networks;



RESUME



- **Major priorities** which are prescribed in the most of these strategies are:
 - improving the national infrastructure and development of NGA networks;
 - improving of e-government services (providing vital basic services to citizens and businesses electronically at central and local levels and increasing of the level of users of electronic services and eGovernment);
 - to efficiently encourage demand for broadband services in order to increase the number of users of broadband access in the wider population.
 - Increase the number of businesses that use ICT for e-commerce;



RESUME



- Providing public places (schools, hospitals etc) with broadband internet access;
- Simplification of administrative procedures and reorganization of proceedings
- Reducing the digital divide between urban and rural areas in the development of infrastructure for broadband access to the Internet.
- Digitalization of cultural content, which aims to ensure efficient processes in culture and management of cultural works.
- Ensuring the freedom to receive and distribute information, whether in terms of allowing access to the Internet as such, or access to certain Internet sites or services
- **A high priority is given to the improvement of fast internet connections** for the public institutions in rural areas.



RESUME



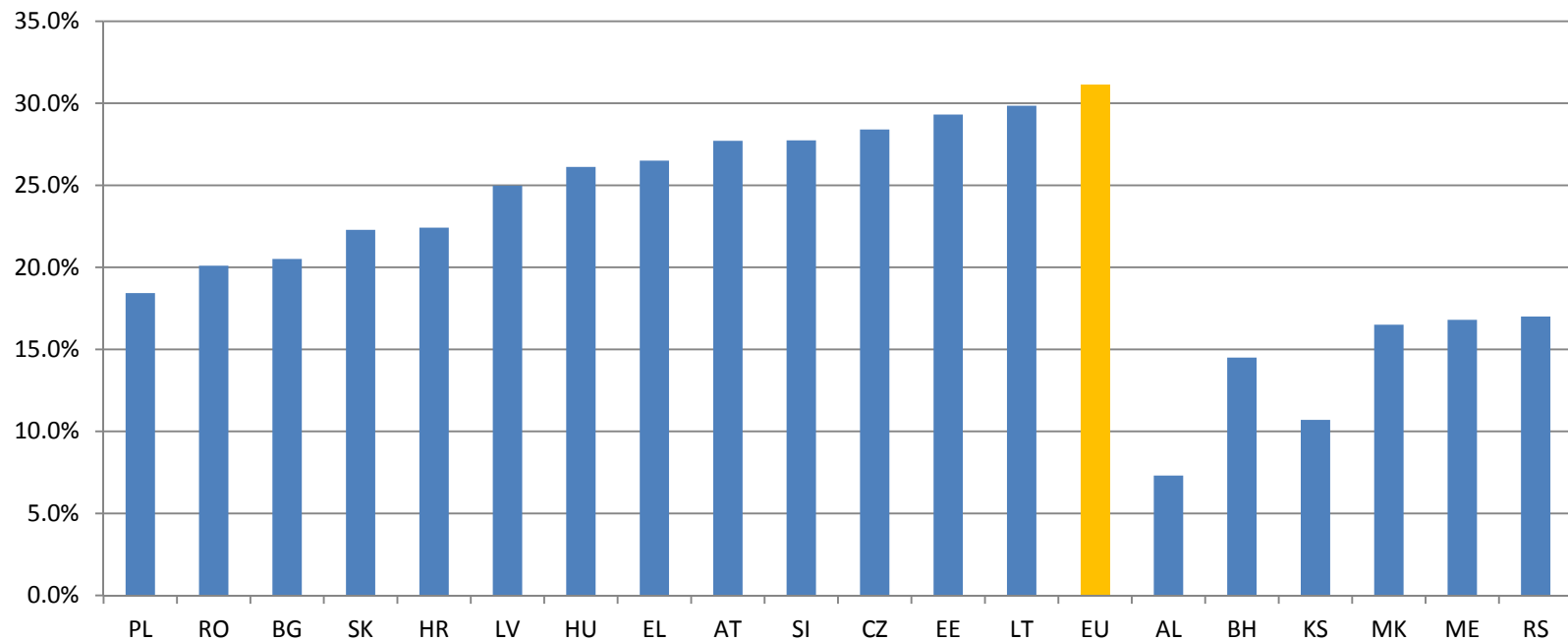
- Citizens' education about the next generation access networks and their offered opportunities.
- Establishing database and cartographic material which will enable operators and regulator to get useful information on the optical network expansion.
- enabling fair conditions for ensuring competition between network providers for broadband internet,
- cooperation between the public and private sector in developing networks in areas which are considered as underdeveloped.



MARKET OVERVIEW



- Fixed broadband penetration

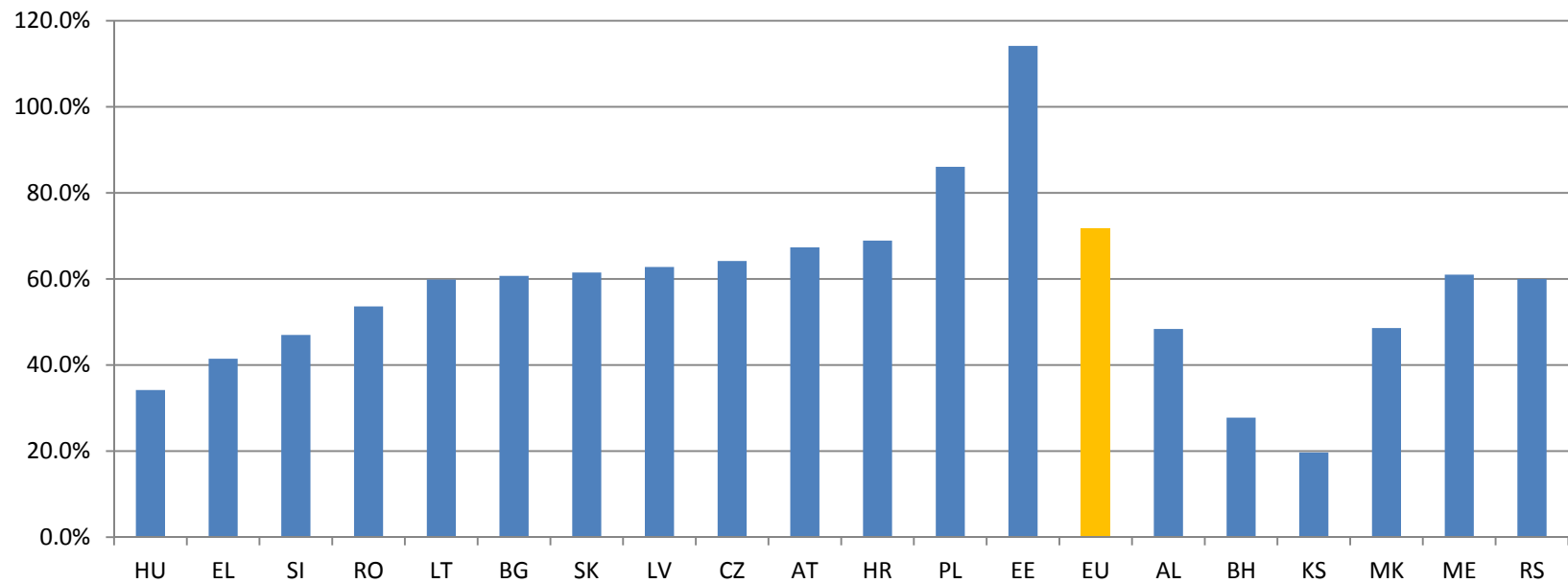




MARKET OVERVIEW



- Mobile broadband penetration





CHALLENGES



- Faster adoption of broadband is needed. **Key activities for faster adoption of broadband should be:**
 - Improvement of level of digital literacy for all citizens;
 - To intensify activities for digital inclusion of all disadvantaged and undeveloped areas and people regardless of their age, education, gender...
 - Development of numerous and different broadband content and services especially services of public administrations which will improve daily life for both citizens and businesses (for example: better health care, safer and more efficient transport solutions, cleaner environment, new media opportunities and easier access to public services and cultural content).



CHALLENGES

- Countries in the Region should **develop responsive mechanism for higher level of cyber security** from the new forms of crime - "cybercrime" - from child abuse to identity theft and cyber-attacks.
- Also, one of challenges is **protection of the right to privacy and personal data** as fundamental rights for all citizens.
- At the end, **attractive content and services** stimulates demand for higher speeds and capacity, which creates the business case for investments in faster networks. The adoption of faster networks opens the way for innovative services exploiting higher speeds. In this way, national aims could be achieved by 2020.



INVESTMENTS



- Investment in broadband infrastructure, especially in NGA networks, is one of the goals in every country.
- Although most of the financing should come from the private sector, funding for the relevant national projects for network roll-out also comes both from national public funds and from the EU, via the European Regional Development Fund (ERDF) and the European Agricultural Fund for Rural Development (EAFRD).
- Member States have allocated ERDF and/or EAFRD funding to broadband deployment for the period 2014-2020, totaling approximately EUR 6 billion.
- The most of countries in the Region has identified white, grey and black areas.
- Construction of broadband networks in white areas are mostly financed by European Structural and Investment funds, or by the other public financial resources in the form of public-private partnerships.



INVESTMENTS

- Grey areas could be eligible for State support; financing from the state budget should be consistent with the rules for state aid and the creation of implementation of innovative broadband services and content.
- **Some of activities which can improved investment and infrastructure development** are:
 - legislative changes which allow quick and efficient issuance of administrative decisions; the legislative facilitations should stimulate the network operators in order to coordinate their construction works and infrastructure sharing;
 - development of information system for broadband infrastructure; all data could be available to citizens, government bodies and operators;
 - building backbone networks by local governments with the use of EU/State funds.



RECOMMENDATIONS



- The further development of broadband access and NGA networks should be based on **partnership among the Government, the operators, the private and civil sector, the local governments and the other stakeholders.**
- A crucial role should be given to the **development of broadband networks** by policies that will stimulate the demand of various types of services of the information society.
- **White, grey and black areas** should be identified in those countries who have not identified them yet.
- The NRA should **speed up proces of allocation of additional radio-frequency spectrum** for further development of mobile broadband access.



RECOMMENDATIONS



- **Mapping of broadband infrastructure and services** for those countries who have not done it yet.
- Big support for further broadband development should be **establishing of the national or regional telecommunication centres** which would support local operators and local governments in the process of future telecommunication investments, infrastructure development and broadband adoption.



RECOMMENDATION



- **Better cooperation between the neighbour countries** in the field of further broadband development (infrastructure and crossborder services) in the border areas, especially in the white areas. (Example: Project “Promoting Connectivity of Internet Broadband in Prokletije Mountain Border Area”).
- Countries in the Region should **cooperate on developing of responsive mechanism for higher level of cyber security and protection of the right to privacy** and personal data of broadband users.



Thank you for your attention!

Boris Jevrić

boris.jevric@ekip.me

Agency for Electronic Communications and Postal Services of
Montenegro
