

## Albania - Telecoms, IP Networks and Digital Media - Insights and Statistics

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### Executive summary

Albanian telecom sector continues shift from fixed to mobile comms. Albania's telecom market is consistent with developments elsewhere in the region, with fixed-line telephony penetration declining as subscribers migrate to mobile solutions and with ongoing government efforts to improve broadband availability and access conditions. The country's small economy is highly dependent on the neighbouring trading partners Italy and Greece. The former still struggles to develop growth while the latter faces yet more austerity as part of the acceptance of another bail out from international lenders.

This has a marked impact on Albania's telecom sector, with revenue growth in continuing decline as customers reduce discretionary spend. Yet penetration in the fixed-line and broadband sectors remains very low by European standards, and so there are opportunities for further investment in networks upgrades to help propel the country's economic growth through digital offerings and IP-based technologies and services. While such investment in fixed-line infrastructure should be encouraged by the regulator (through access regulations) and the government (through investments), in the short term consumers will continue to prefer mobile networks for voice and data services, and as a result the mobile sector will be the focus for future growth in the market overall.

The country has long sought accession to the European Union (EU) which has benefited its telecoms sector through closer scrutiny of its regulatory regime and through the injection of funding to help modernise infrastructure. Albania signed a Stabilisation and Association Agreement with the EU, which came into force in mid-2009. As part of the EU pre-accession process, Albania has received financial aid to build public institutions and improve cross-border co-operation under the EU's Instrument for Pre-Accession Assistance funding mechanism. Since June 2014 Albania has been recognised as an official candidate for accession to the EU.

### Key developments:

Plus Communications and Albtelcom secure 2600MHz spectrum licenses; Albtelcom's share of the broadband market continues to be squeezed by competitors; report update includes the regulator's market data to September 2016, operator data to Q4 2016, recent market developments.

### Market penetration rates in Albania's telecoms sector – 2016 (e)

Penetration of telecoms services: Penetration

Fixed-line telephony 6%

Fixed broadband 9.4%

Mobile SIM (population) 111%

(Source: BuddeComm)

Companies mentioned in this report: Vodafone Albania, Albtelcom (Eagle Mobile), Telekom Albania (AMC), Cosmote, Turk Telecom, Primo Communications.

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