Viðauki C

Fjarskiptastofa

Markaðshlutdeildir og útbreiðsla í sveitarfélögum frá miðju ári 2021 til miðs ára 2023

(Markaðir 3a/2016 og 3b/2016)

Málsnúmer: 2022020045

5. apríl 2024

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1 Inngangur

1. Fjarskiptastofu (FST) bárust uppfærð gögn frá markaðsaðilum fyrir fyrri hluta árs 2023 í október 2023. Tölur fyrir hvern landfræðilegan markað sem sýna fimm gagnapunkta frá lok júní 2021 til loka júní 2023, er að finna í köflum 2 og 3 hér að neðan. Framsetning gagna fyrir hvern markað er með sama hætti og í köflum 6.2 og 6.3 í markaðsgreiningu í viðauka A, tölurnar eru útskýrðar í kafla 6.2.1.

2. Þrátt fyrir að þessi gögn fyrir fyrri hluta ársins 2023 séu nú tiltæk ákvað FST að ráðast ekki í þá vinnu að uppfæra alla markaðsgreininguna með þessum gögnum. FST rannsakaði nýju gögnin fyrir hvern landfræðilegan markað til að sjá hvort þau kölluðu á breytingar á tilnefningu aðila með umtalsverðan markaðsstyrk. Niðurstaða þessarar rannsóknar var sú að ástæða væri til að breyta mati á umtalsverðum markaðsstyrk á þremur landfræðilegum mörkuðum, þ.e. í Súðavíkurhreppi á markaði 3a og 3b, Vopnafjarðarhreppi á markaði 3a og Fljótsdalshreppi á markaði 3b. Eftir ítarlega viðbótarrannsókn taldi FST hins vegar ekki gildar ástæður til að breyta mati í Seltjarnarnesbæ þrátt fyrir aukna markaðshlutdeild Ljósleiðarans í því sveitarfélagi. Þessar breytingar á niðurstöðu FST sem leiddi af nýju gögnunum fóru í innanlandssamráð, annað samráð FST í þessu máli. Í þriðja samráði FST breytti stofnunin afstöðu sinni til umtalsverðs markaðsstyrks Mílu í Rangárþingi eystra. Ástæða þeirrar breytingar voru upplýsingar sem komu fram í fyrsta samráði FST, sem kölluðu á frekari gagnaöflun og leiddi til leiðréttinga á gögnum í því sveitarfélagi.

3. FST hefur ekki nýrri upplýsingar um tengingar farsímanetsbeina en hefur bætt þeim tengingum við fastanettengingar fyrir lok júní 2023 á sama hátt og gert var fyrir fastnetstengingar í árslok 2022. Upplýsingar um farsíma netbeinatengingar voru frá apríl 2023 og þær upplýsingar eru því nær upplýsingum frá júní 2023 en desember 2022.

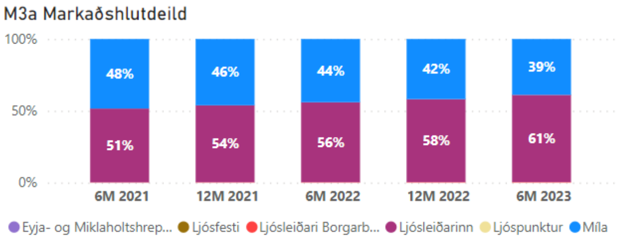
4. Þegar litið er á tölur um útbreiðslu á myndunum hér að neðan má benda á að hlutfall ljósleiðaraútbreiðslu getur minnkað á milli ára á landfræðilegum markaði. Þetta getur gerst þegar heimilum og fyrirtækjum fjölgar og annaðhvort er ekki lagður ljósleiðari á-til þessara heimilisfanga eða að seinkun verður á skráningu ljósleiðarans. Þetta getur líka gerst þegar heimili eða fyrirtæki er ekki lengur skráð sem slíkt sem veldur fækkun heimila og fyrirtækja í ákveðnu sveitarfélagi og heimilið/fyrirtækið var með ljósleiðaratengingu.

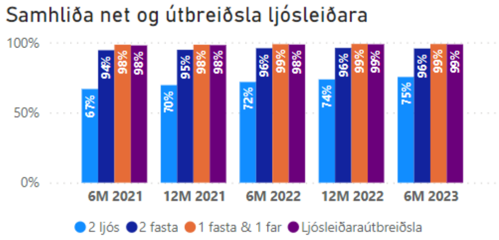
2 Markaður 3a

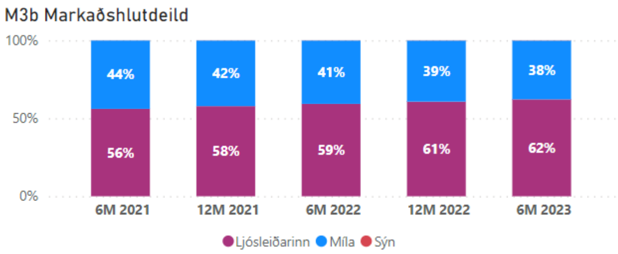
2.1 Svæði A

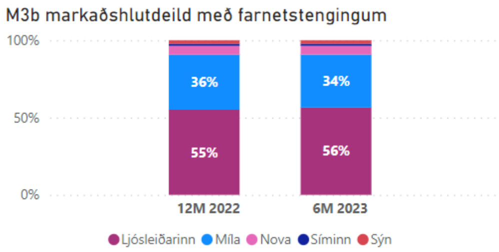
5. Eftirfarandi 8 sveitarfélög falla undir svæði A:

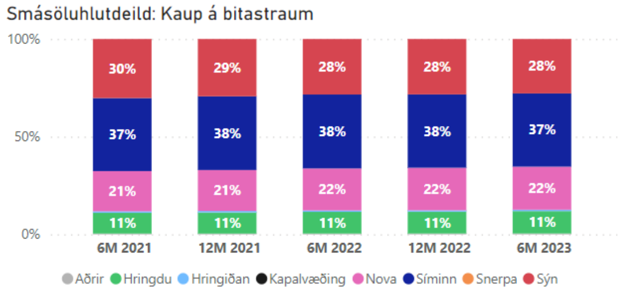
- Akraneskaupstaður
- Borgarbyggð
- Garðabær
- Hafnarfjarðarkaupstaður
- Hveragerðisbær
- Kópavogsbær
- Mosfellsbær
- Reykjavíkurborg

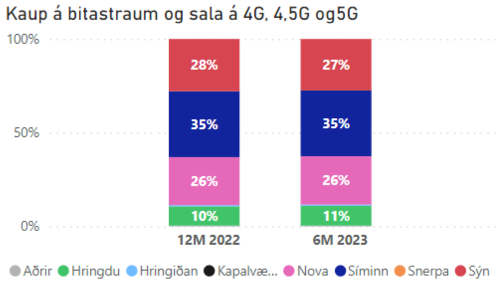










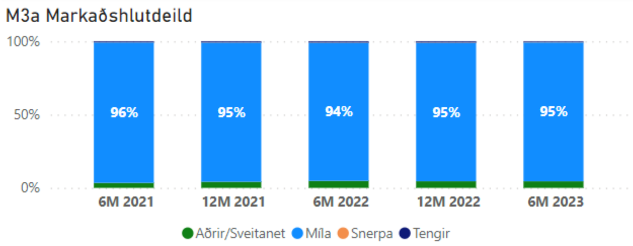


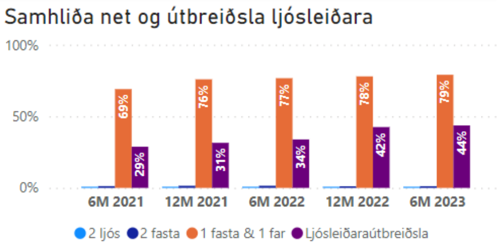
2.2 Svæði B

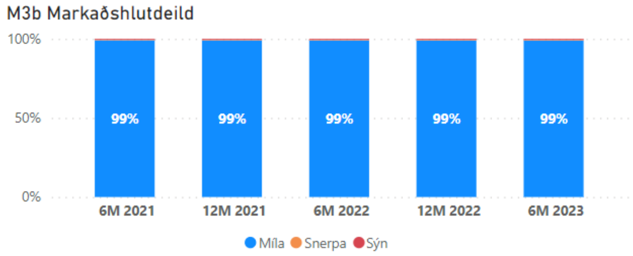
6. Eftirfarandi 15 sveitarfélög falla undir svæði B:

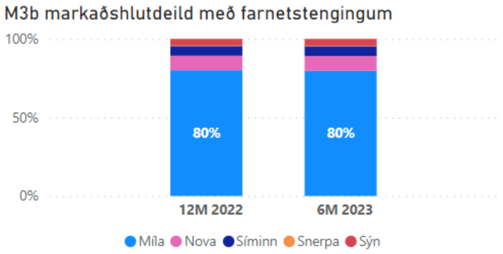
- Fjarðabyggð
- Grundarfjarðarbær

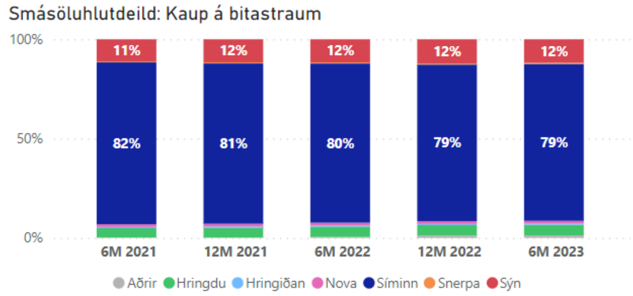
- Húnabyggð
- Húnaþing vestra
- Kaldrananeshreppur
- Langanesbyggð
- Skagabyggð
- Skagafjörður
- Snæfellsbær
- Strandabyggð
- Sveitarfélagið Hornafjörður
- Sveitarfélagið Skagaströnd
- Sveitarfélagið Stykkishólmur
- Tálknafjarðarhreppur
- Vesturbyggð[1]

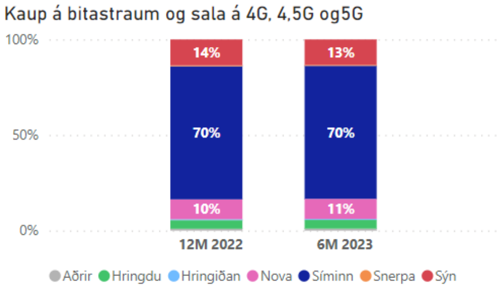










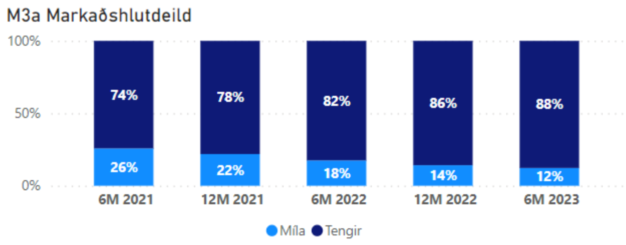


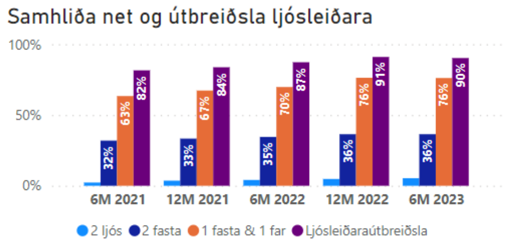
[1] Hluti af ljósleiðaraheimtaugum sem skráðar eru í eigu Vesturbyggðar eru í sameiginlegri eigu með Vesturbyggðar og Mílu. Míla hefur yfirráð yfir þeim heimtaugum sem eru í sameiginlegri eigu Mílu og Vesturbyggðar þar sem þær heimtaugar eru beintengdar stofnleiðara Mílu og ekki hægt að tengjast þeim á annan hátt eins og staðan er í dag.

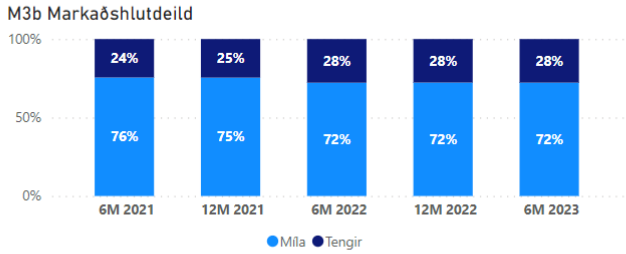
2.3 Svæði C

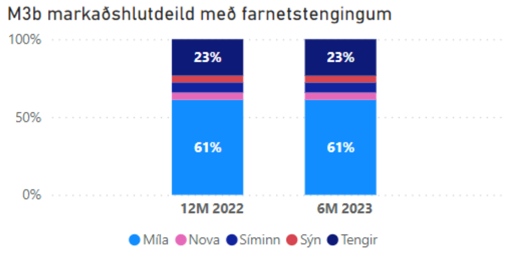
7. Eftirfarandi 6 sveitarfélög falla undir svæði C:

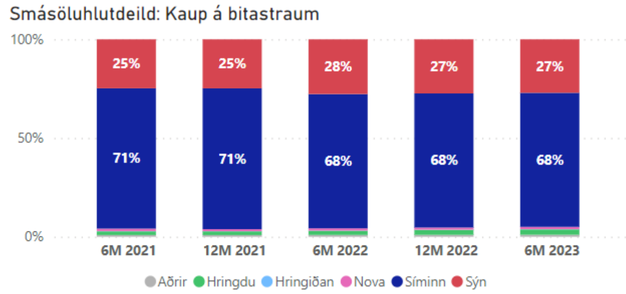
- Dalvíkurbyggð
- Eyjafjarðarsveit
- Grýtubakkahreppur
- Hörgársveit
- Svalbarðsstrandarhreppur
- Þingeyjarsveit

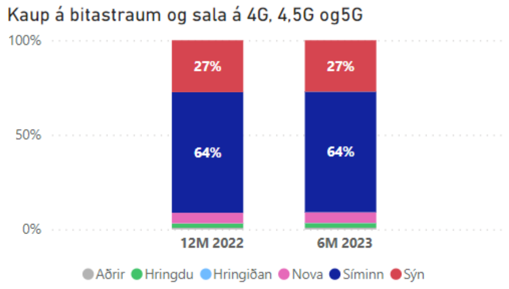






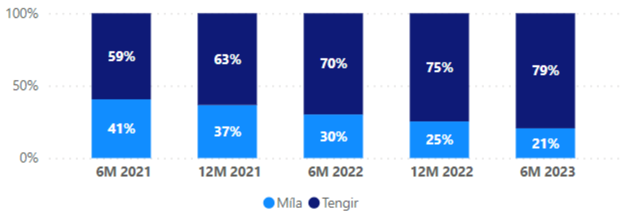




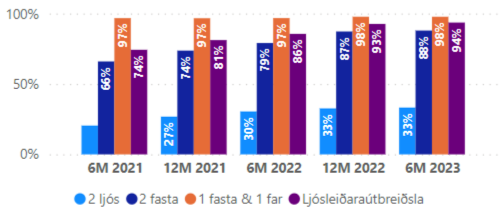


2.4 Akureyrarbær

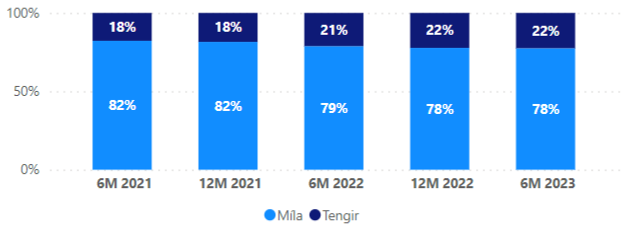
M3a Markaðshlutdeild



Samhliða net og útbreiðsla ljósleiðara



M3b Markaðshlutdeild



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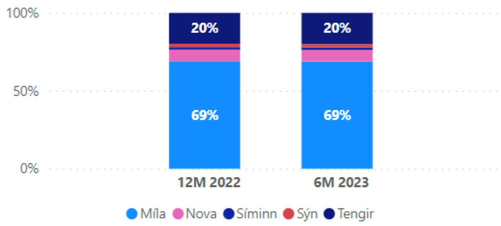
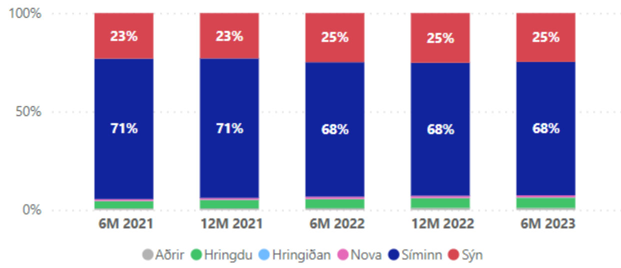
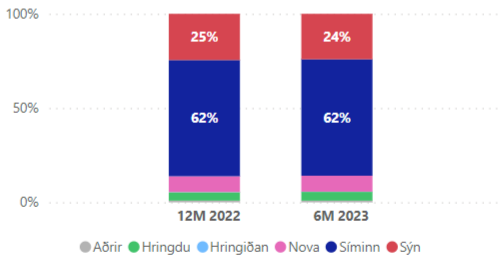


Smásöluhlutdeild: Kaup á bitastraum

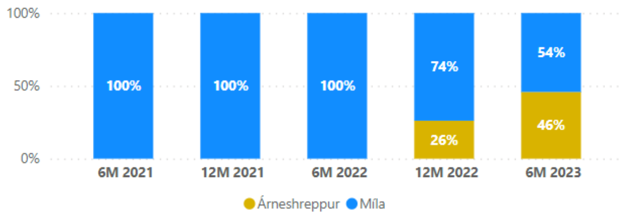


Kaup á bitastraum og sala á 4G, 4,5G og5G



2.5 Árneshreppur

M3a Markaðshlutdeild



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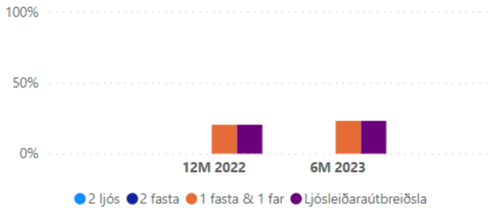
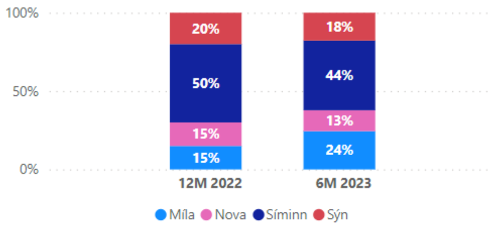


M3b Markaðshlutdeild

M3b markaðshlutdeild með farnetstengingum



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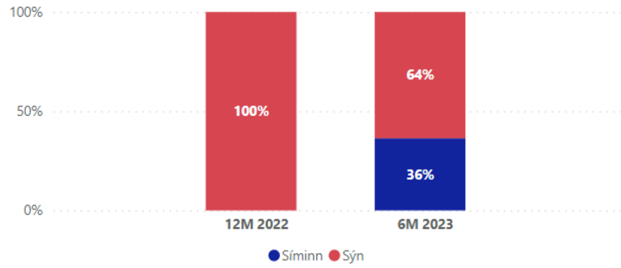

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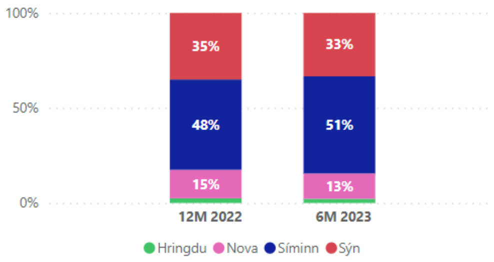
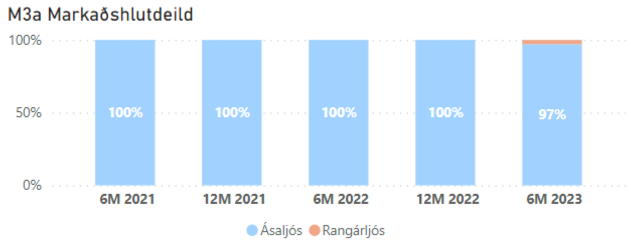
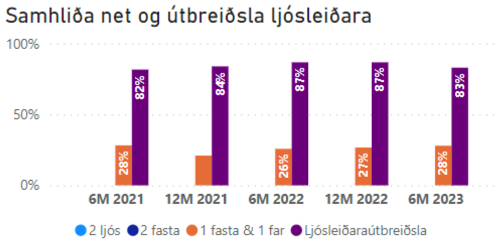
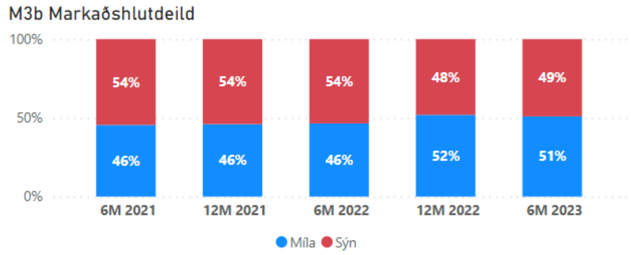
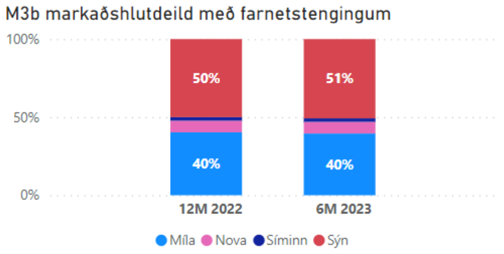


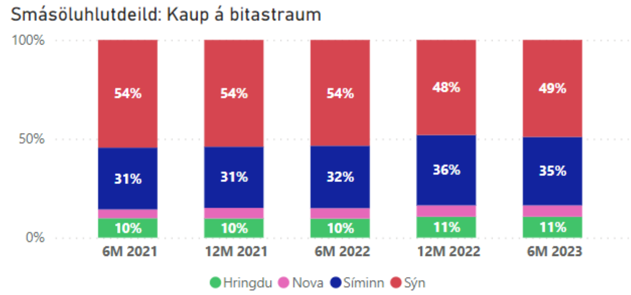
2.6 Ásahreppur

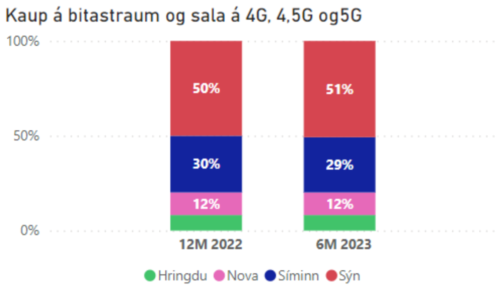




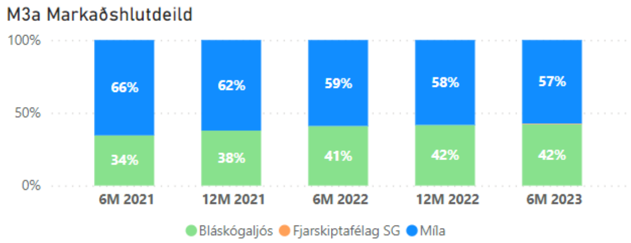


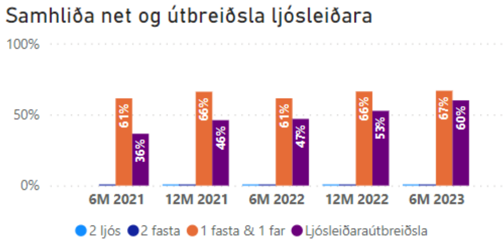


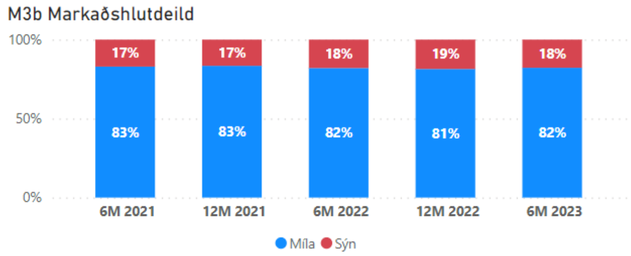


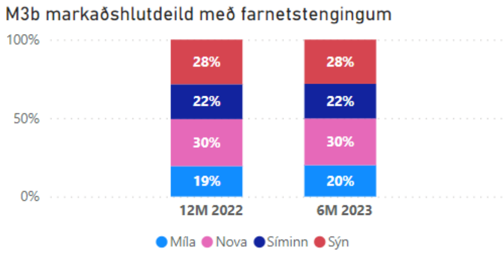


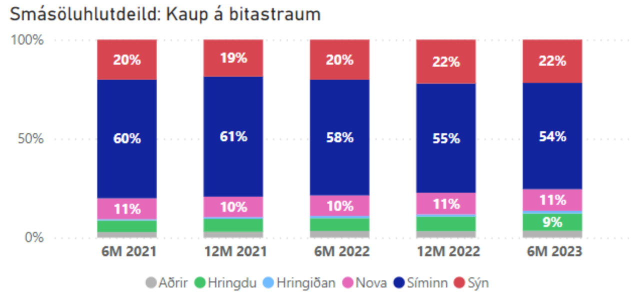
2.7 Bláskógabyggð

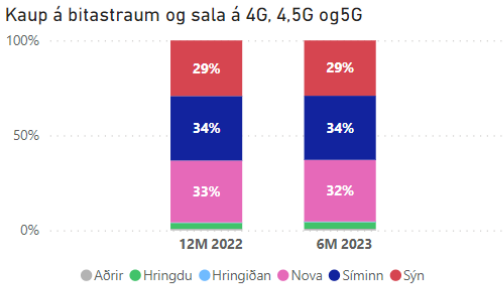






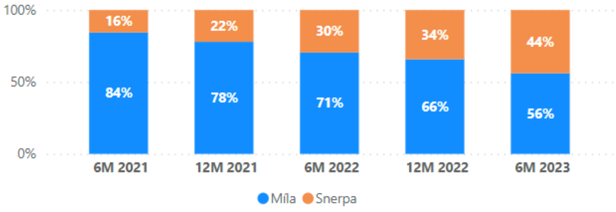




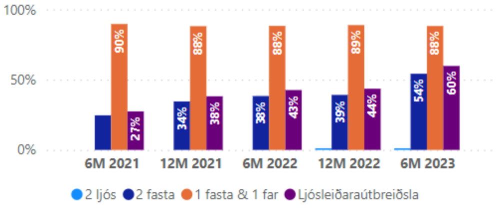


2.8 Bolungarvíkurkaupstaður

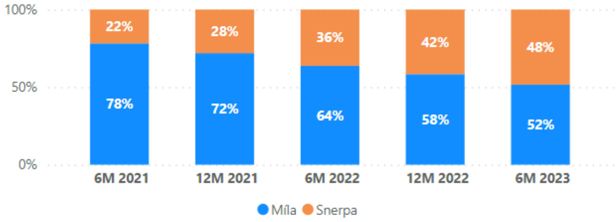
M3a Markaðshlutdeild



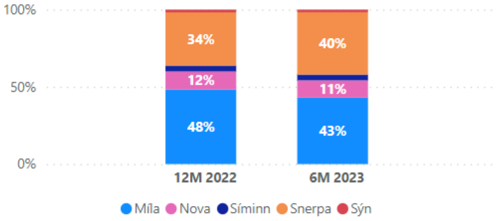
Samhliða net og útbreiðsla ljósleiðara



M3b Markaðshlutdeild



M3b markaðshlutdeild með farnetstengingum



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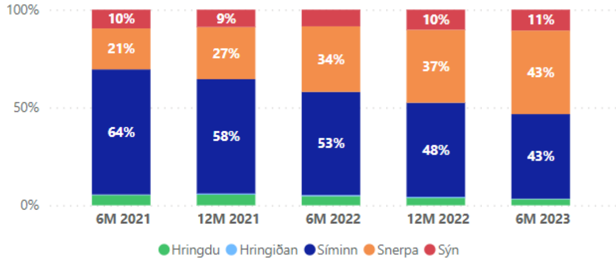
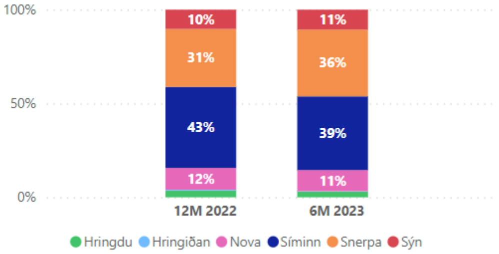
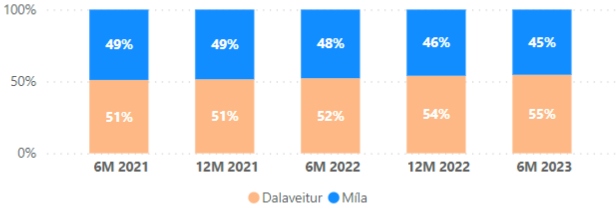


Kaup á bitastraum og sala á 4G, 4,5G og5G



2.9 Dalabyggð

M3a Markaðshlutdeild



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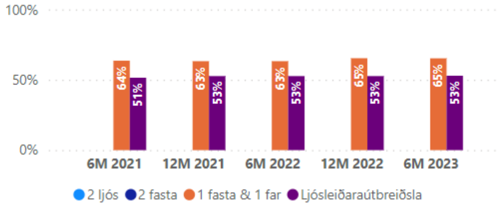
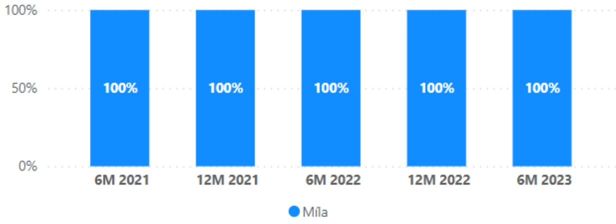
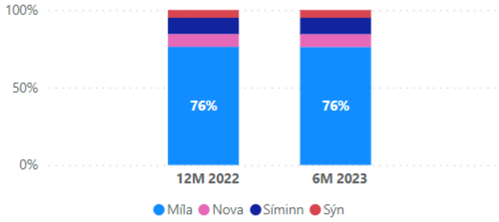


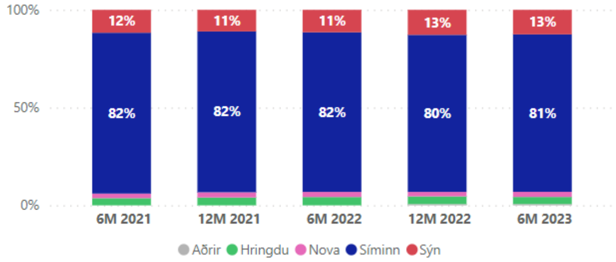
M3b Markaðshlutdeild



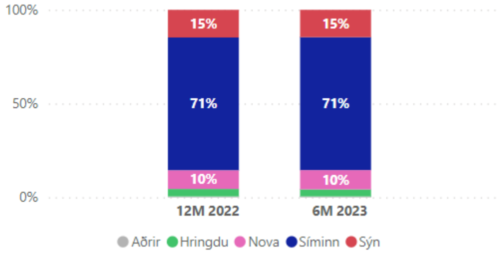
M3b markaðshlutdeild með farnetstengingum



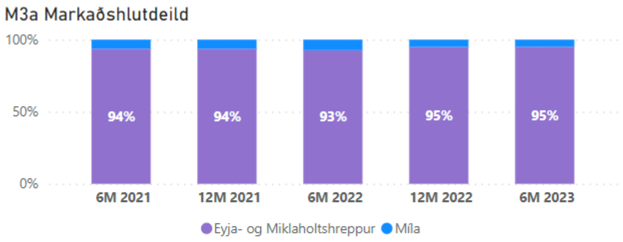
Smásöluhlutdeild: Kaup á bitastraum

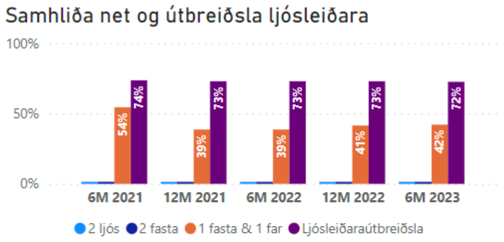


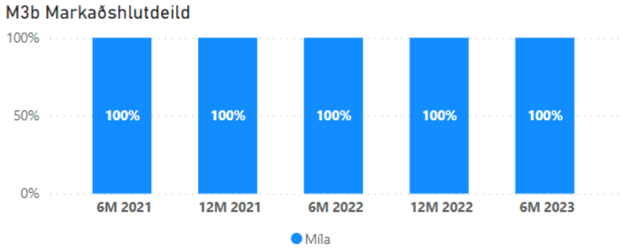
Kaup á bitastraum og sala á 4G, 4,5G og5G

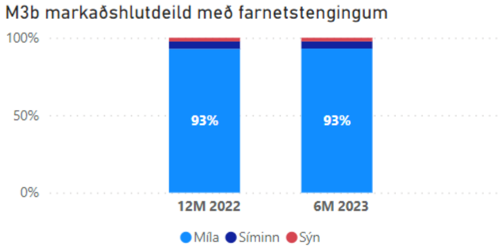


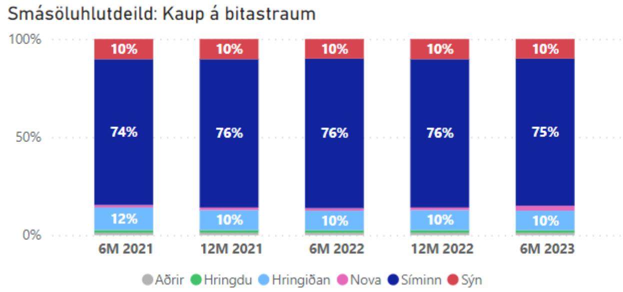
2.10 Eyja- og Miklaholtshreppur

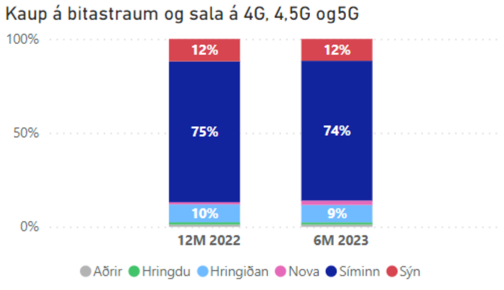




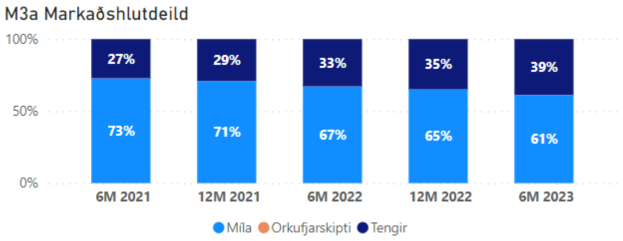


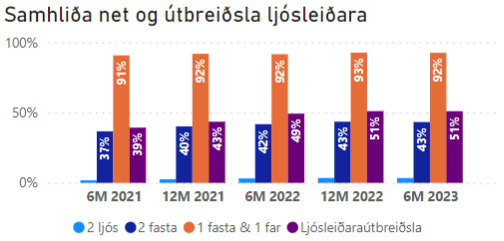


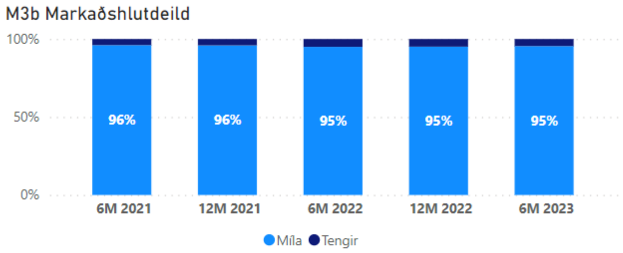


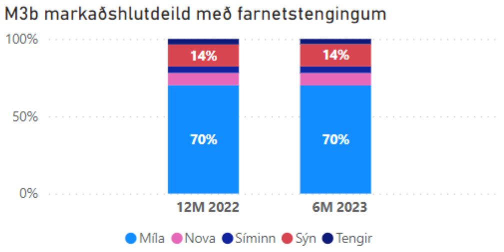


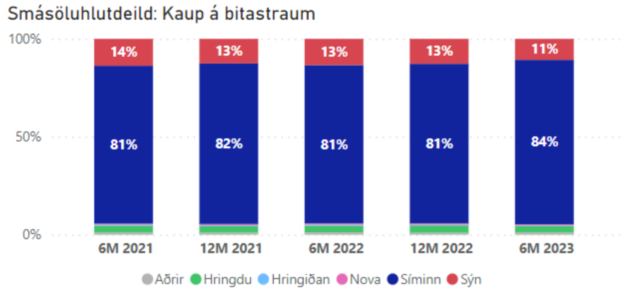
2.11 Fjallabyggð

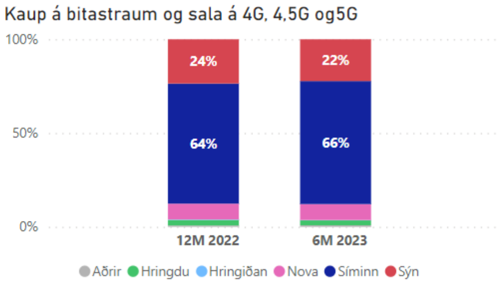












2.12 Fljótsdalshreppur

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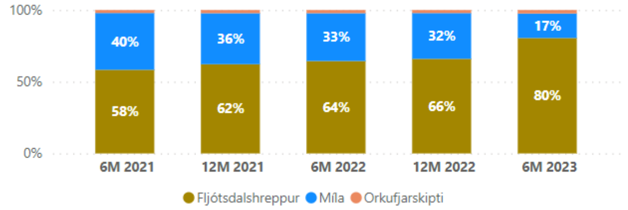
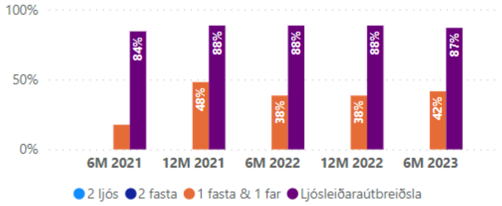
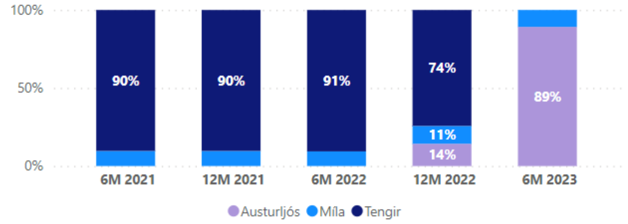


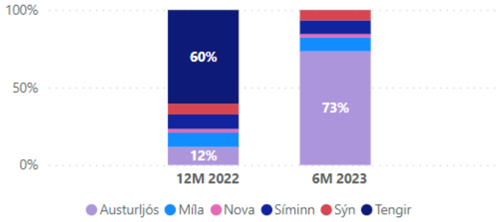
Samhliða net og útbreiðsla ljósleiðara



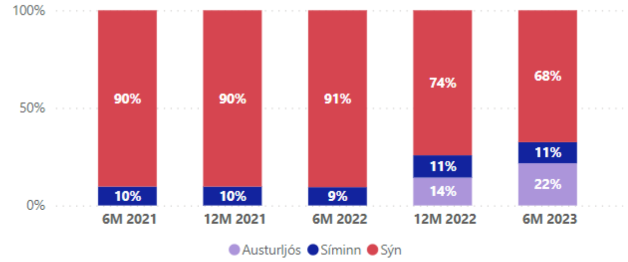
M3b Markaðshlutdeild



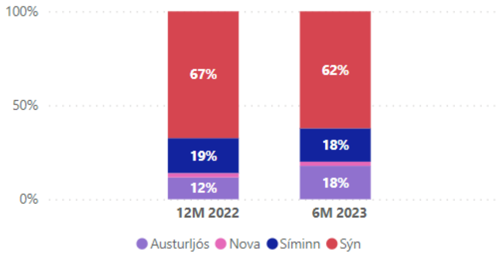
M3b markaðshlutdeild með farnetstengingum



Smásöluhlutdeild: Kaup á bitastraum



Kaup á bitastraum og sala á 4G, 4,5G og5G



2.13 Flóahreppur

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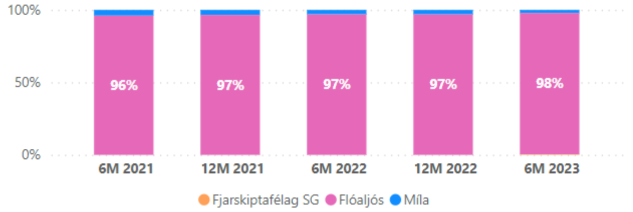
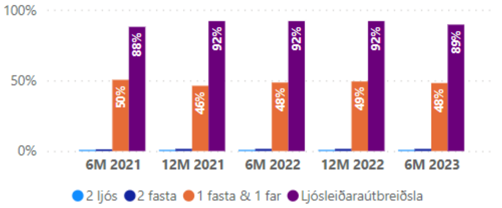


Samhliða net og útbreiðsla ljósleiðara



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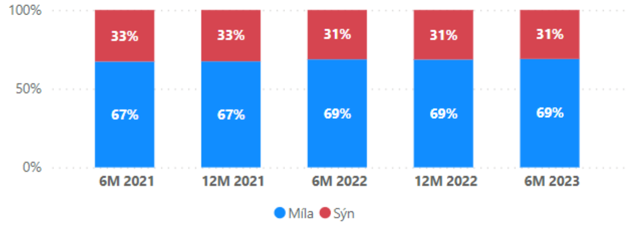
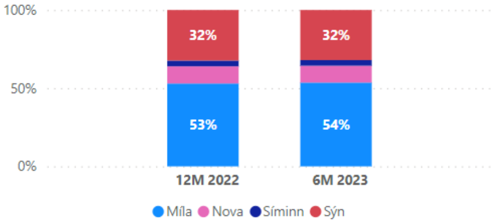
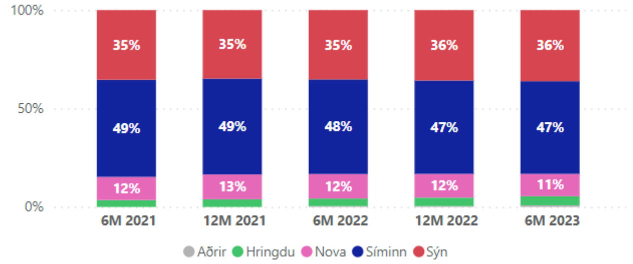


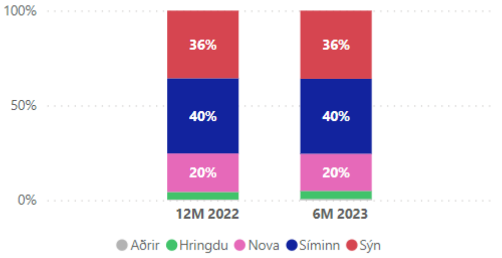
M3b markaðshlutdeild með farnetstengingum



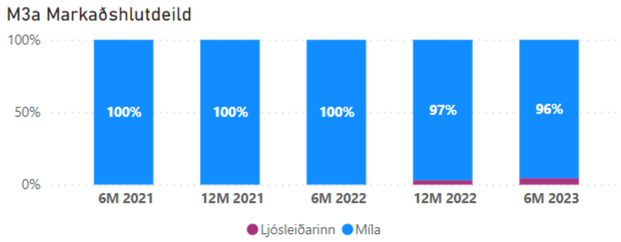
Smásöluhlutdeild: Kaup á bitastraum

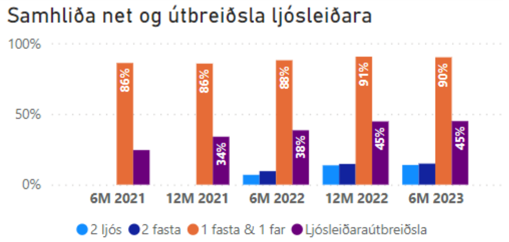


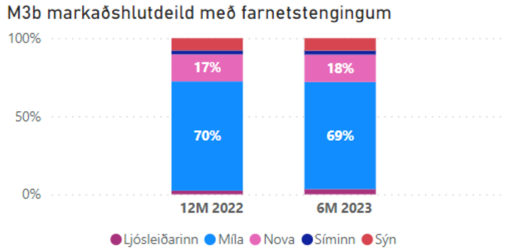
Kaup á bitastraum og sala á 4G, 4,5G og5G

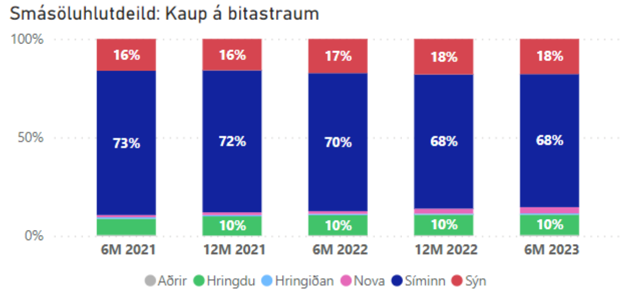


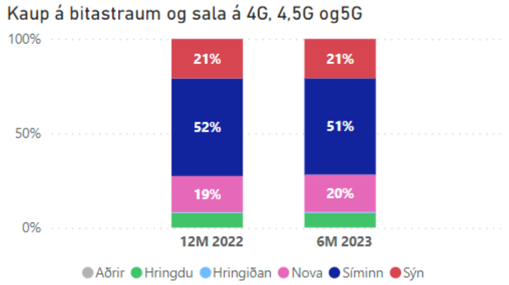
2.14 Grindavíkurbær



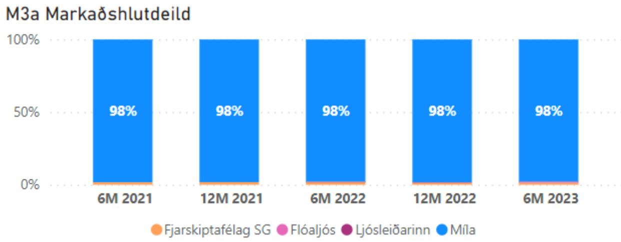


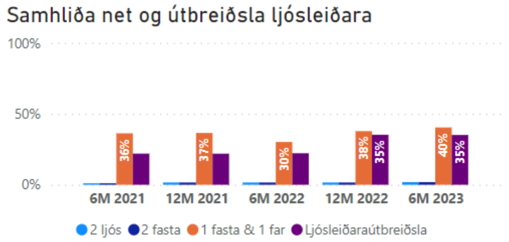


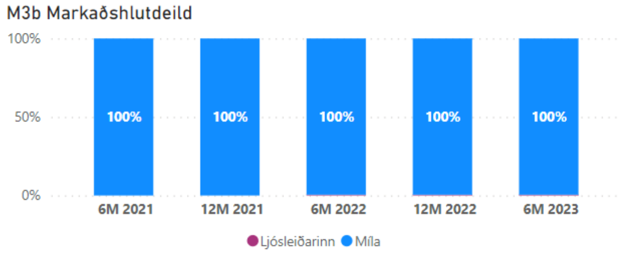


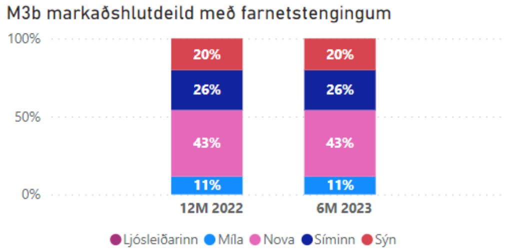


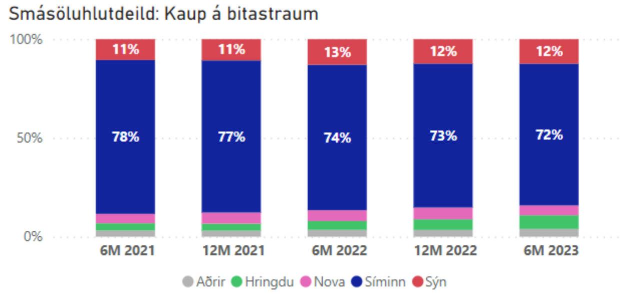
2.15 Grímsnes- og Grafningshreppur

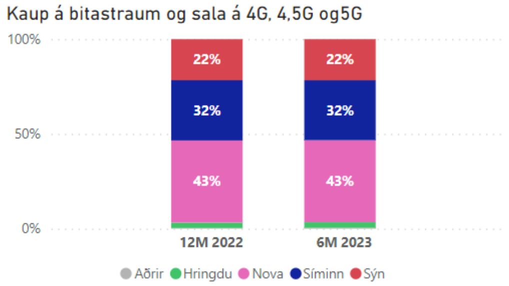




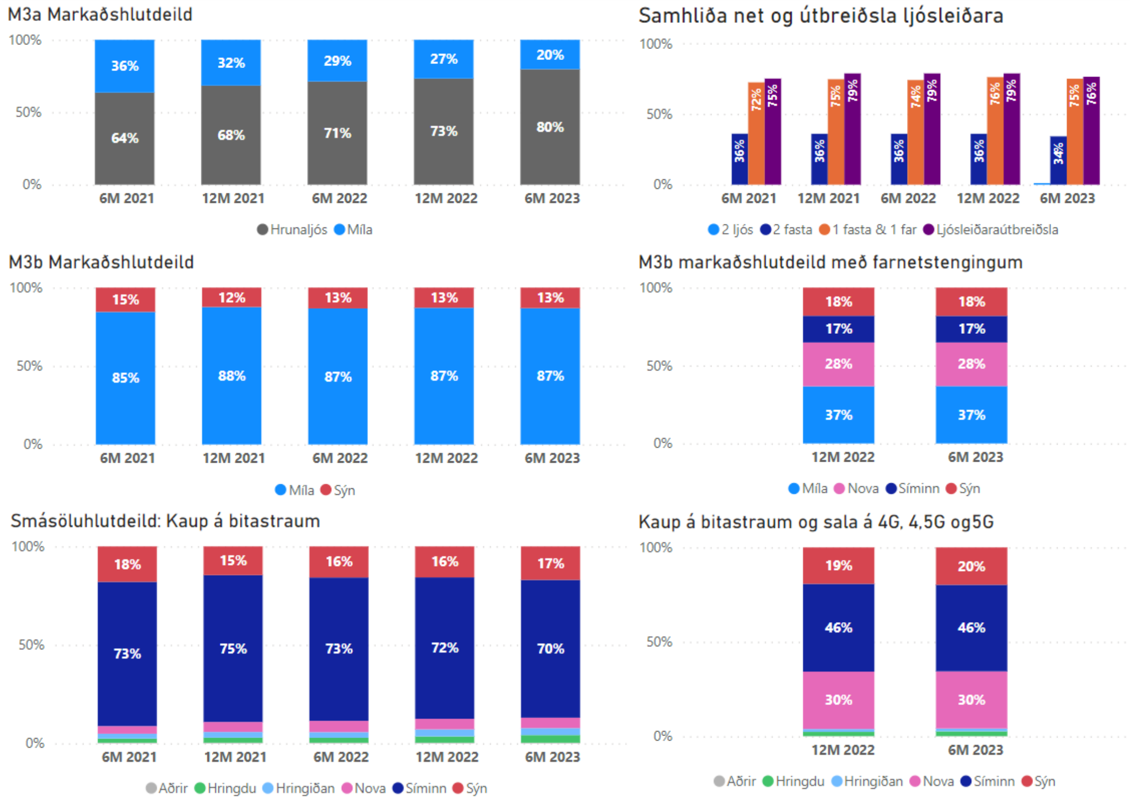




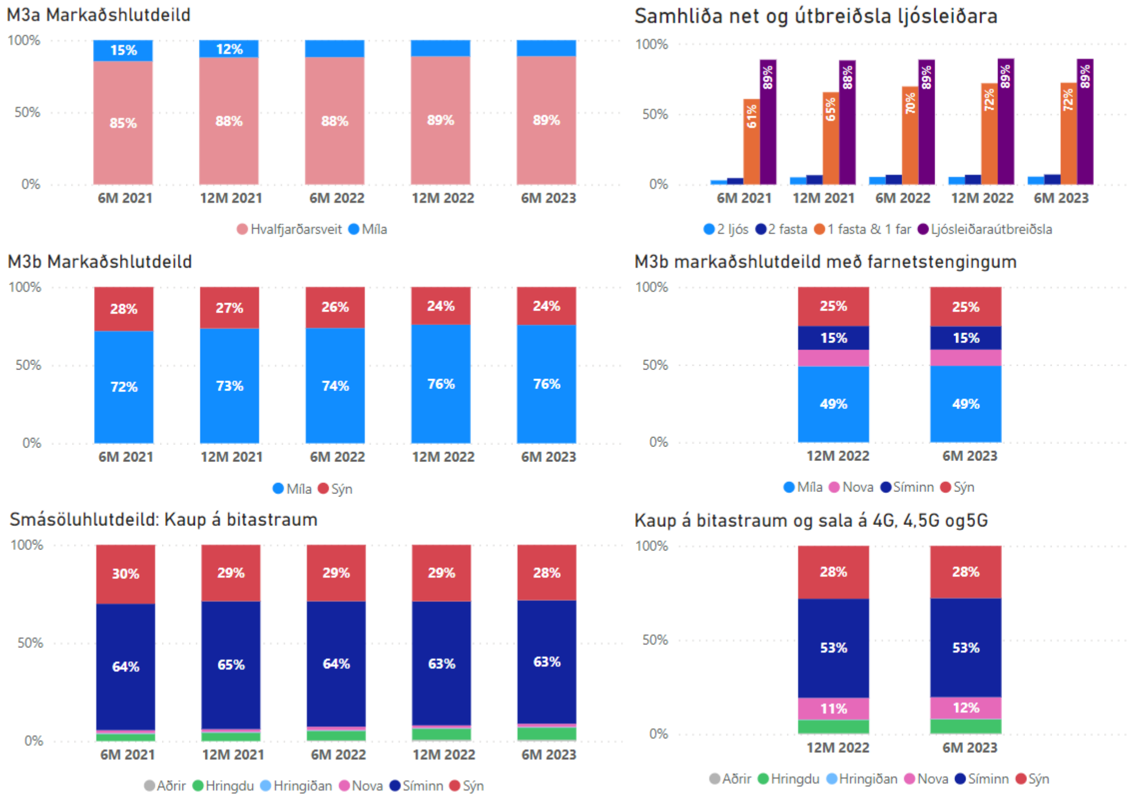




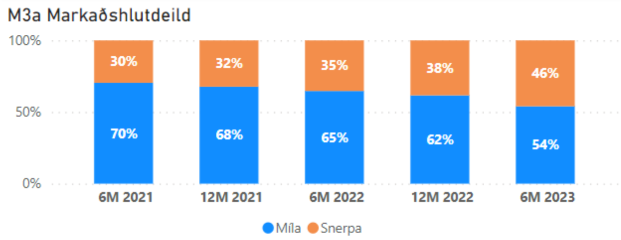
2.16 Hrunamannahreppur

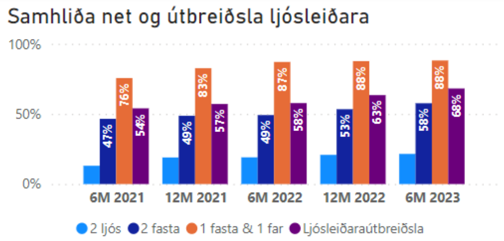


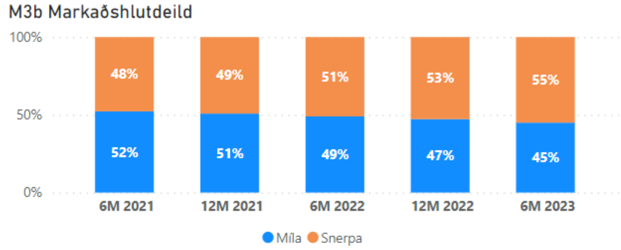
2.17 Hvalfjarðarsveit

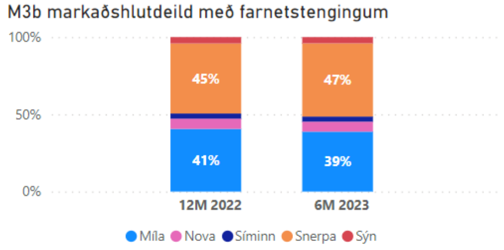


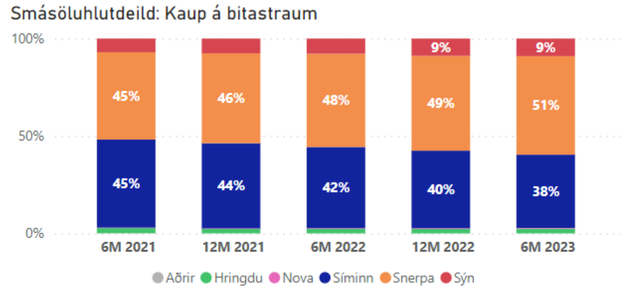
2.18 Ísafjarðarbær

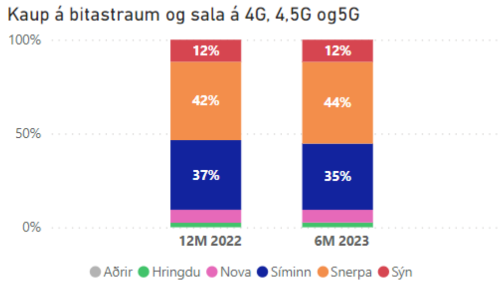




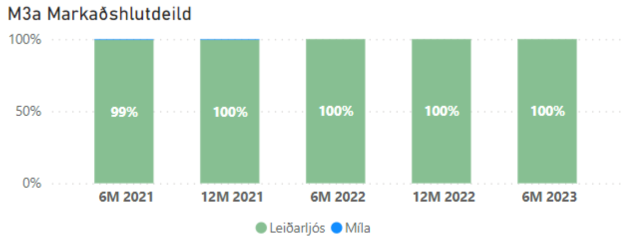


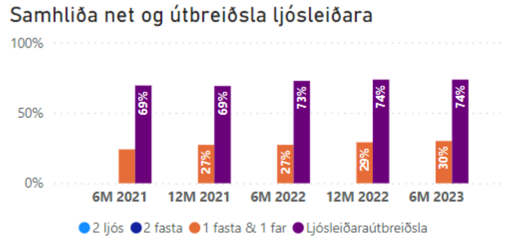


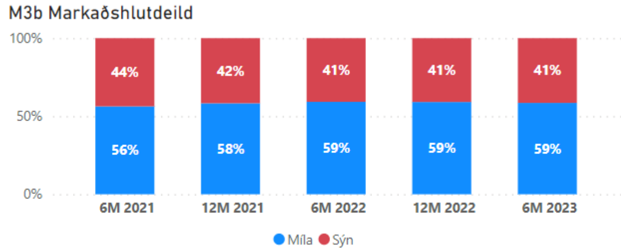


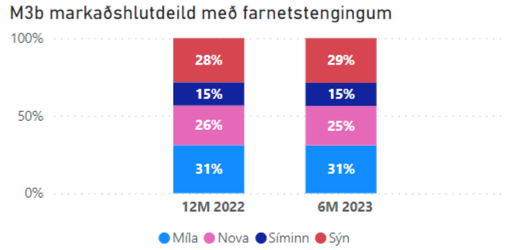


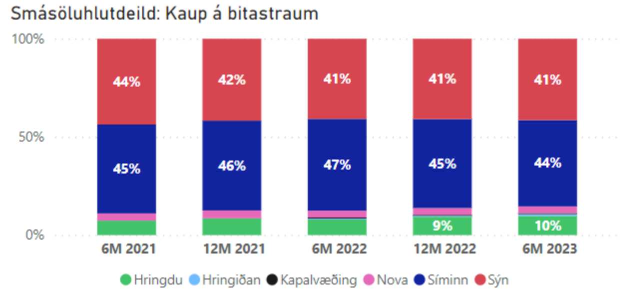
2.19 Kjósarhreppur

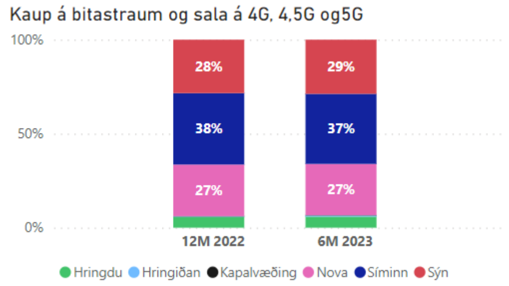




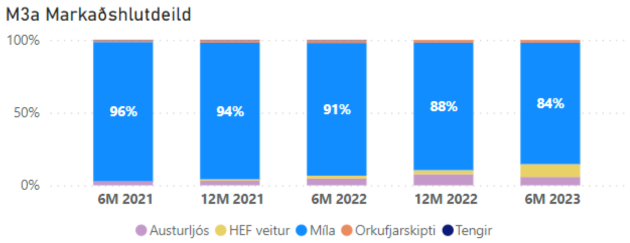


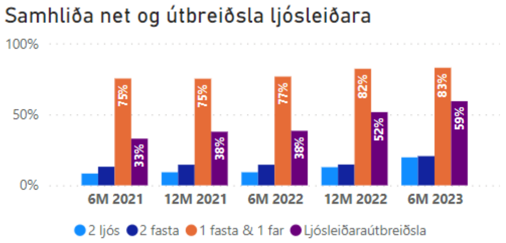


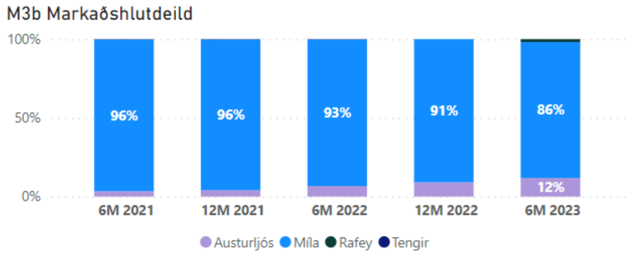


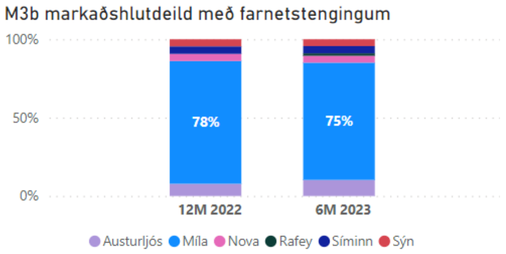


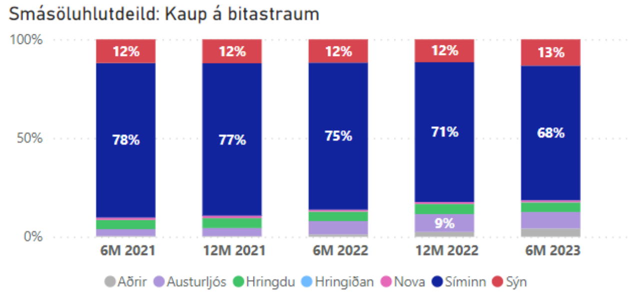
2.20 Múlaþing

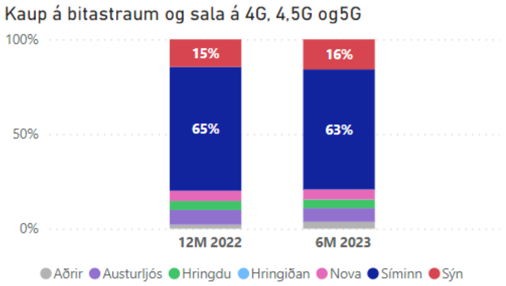












2.21 Mýrdalshreppur[2]

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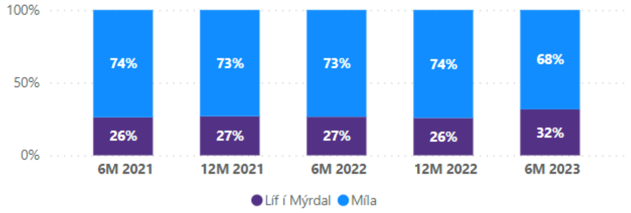
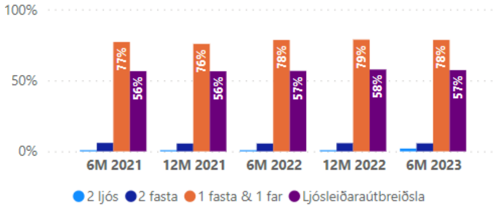
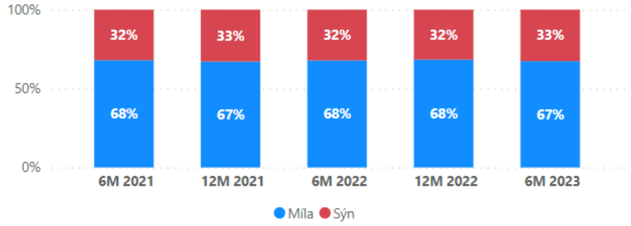


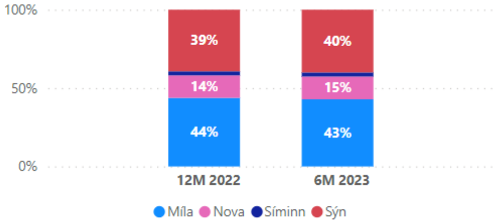
Samhliða net og útbreiðsla ljósleiðara



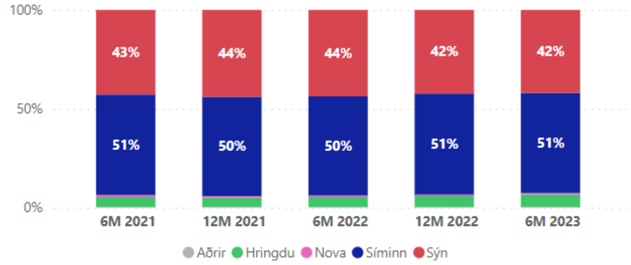
M3b Markaðshlutdeild



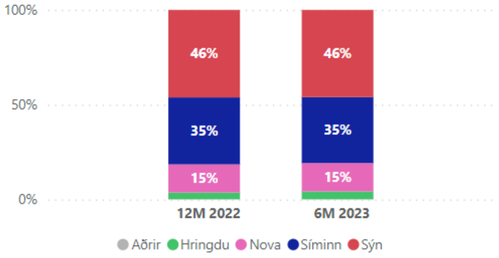
M3b markaðshlutdeild með farnetstengingum



Smásöluhlutdeild: Kaup á bitastraum

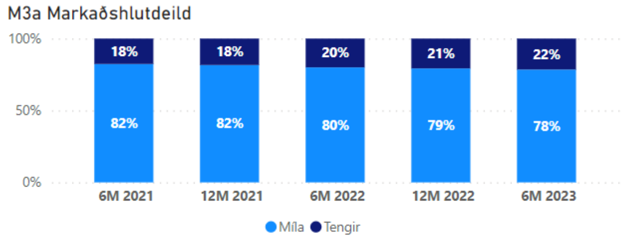


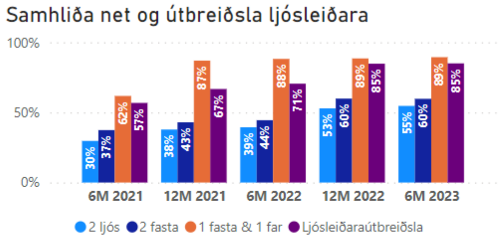
Kaup á bitastraum og sala á 4G, 4,5G og5G

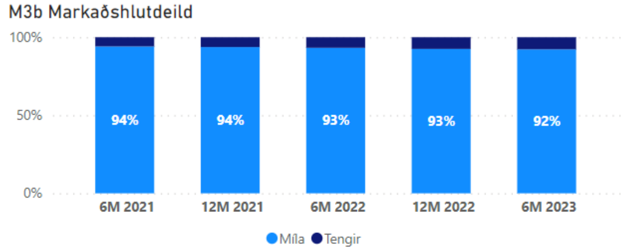


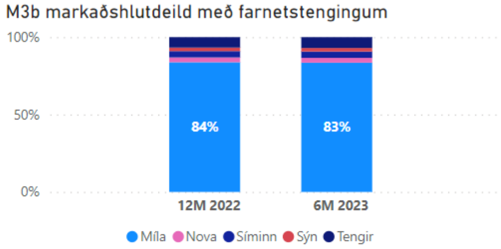
[2] Ljósleiðarinn eignaðist ljósleiðaranet Lífs í Mýrdal eftir júní 2023.

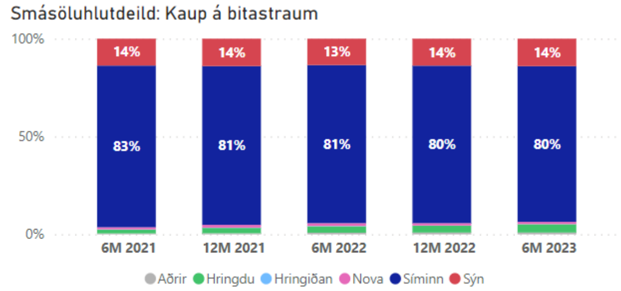
2.22 Norðurþing

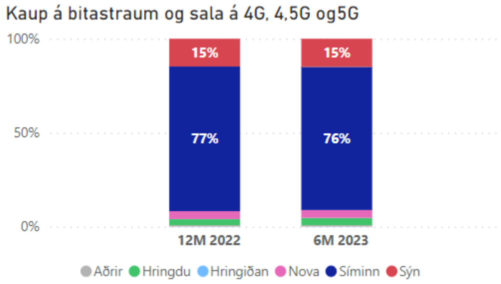




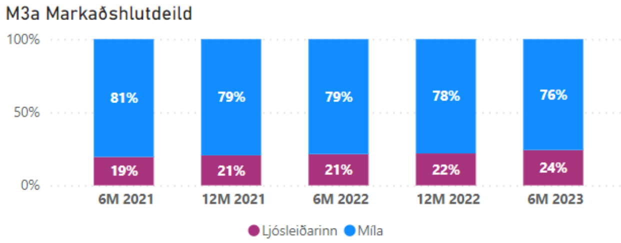


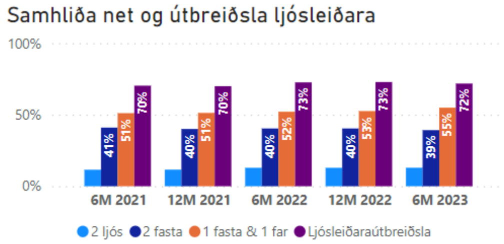


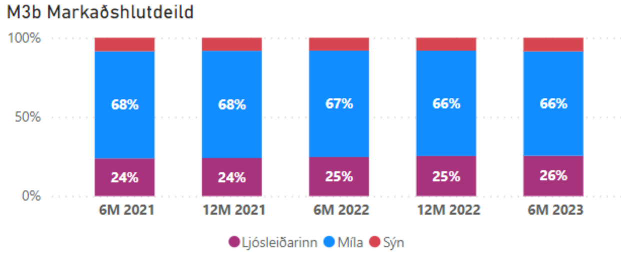


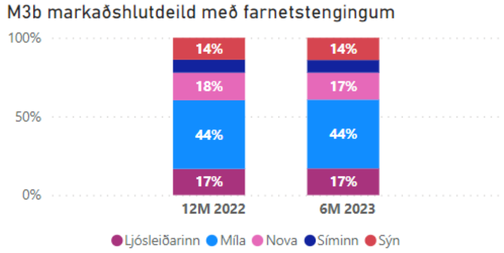


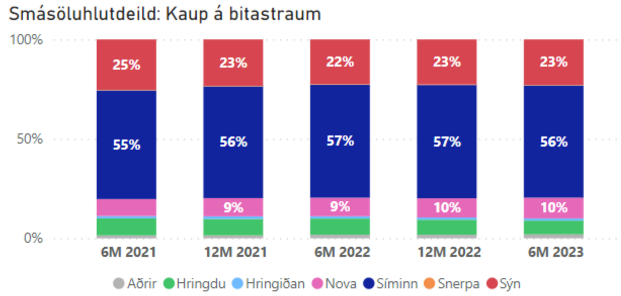
2.23 Rangárþing eystra

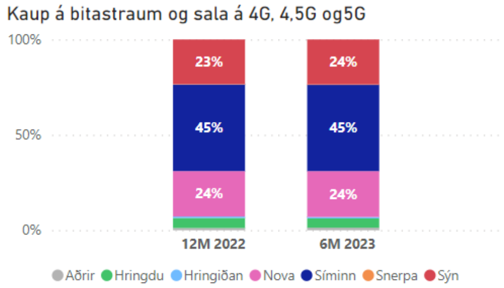




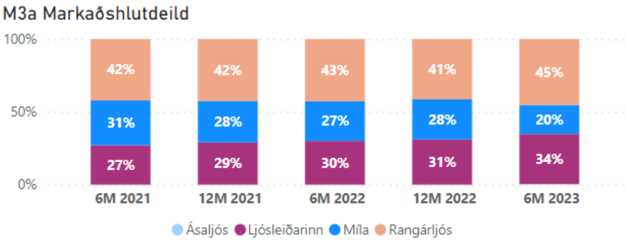


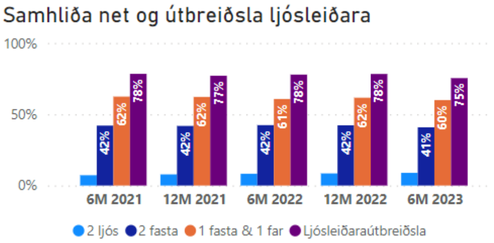


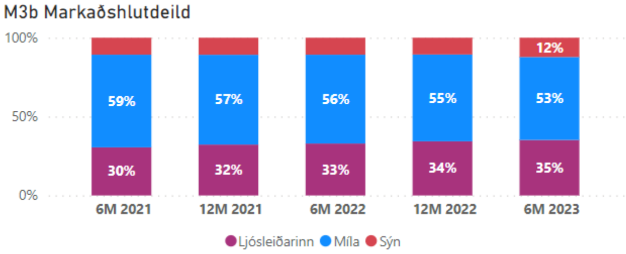


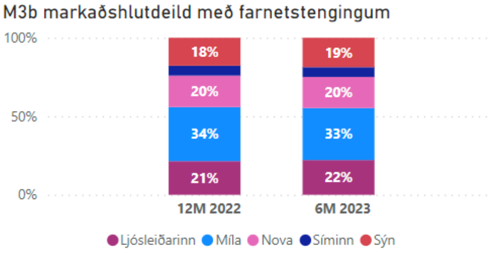


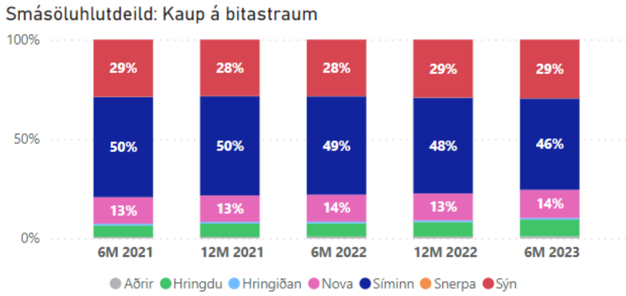
2.24 Rangárþing ytra

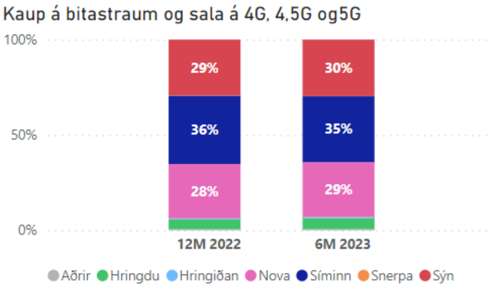




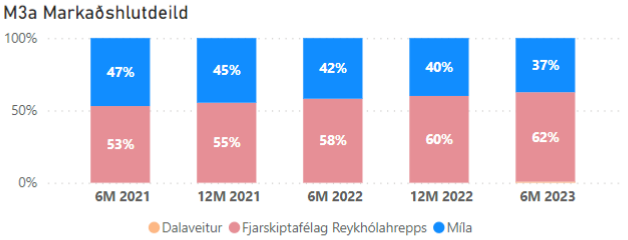


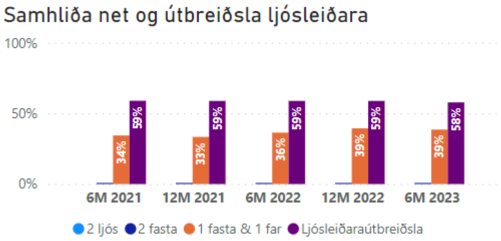


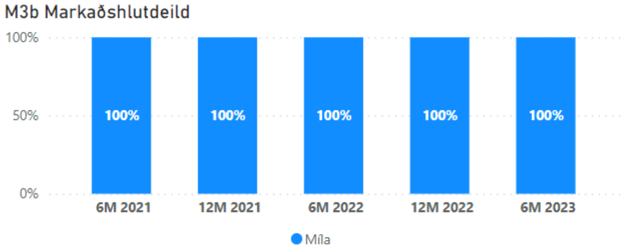


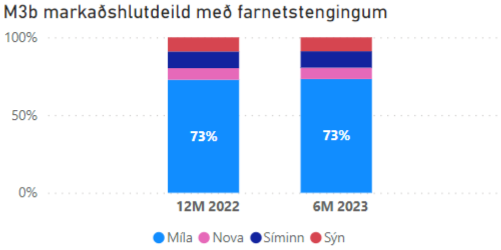


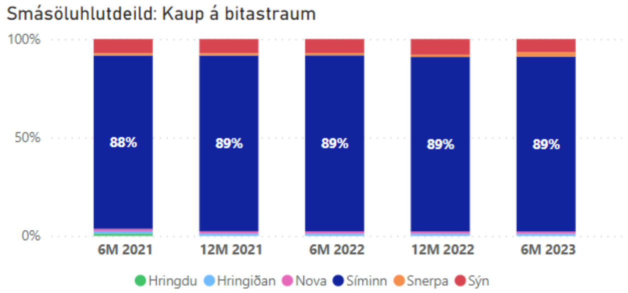
2.25 Reykhólahreppur

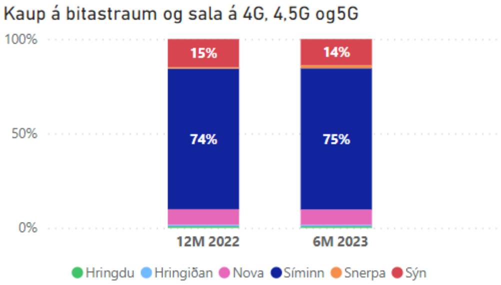




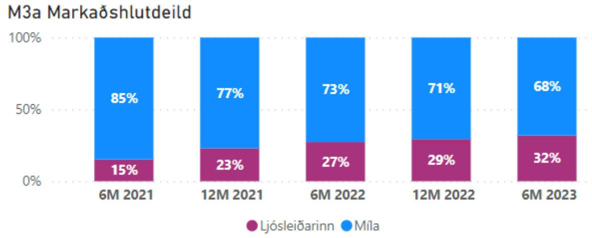


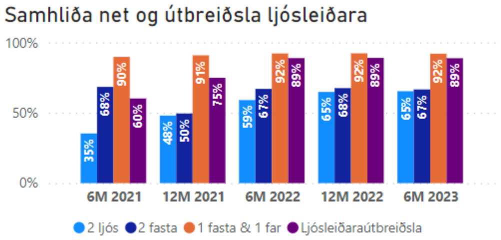


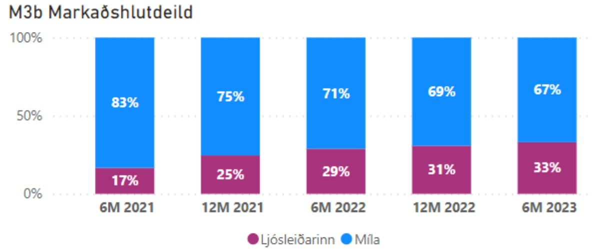


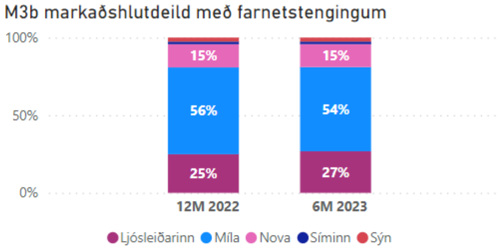


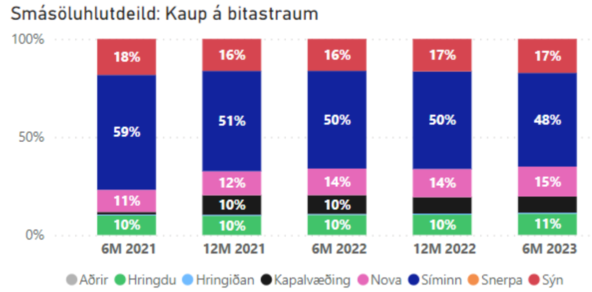
2.26 Reykjanesbær

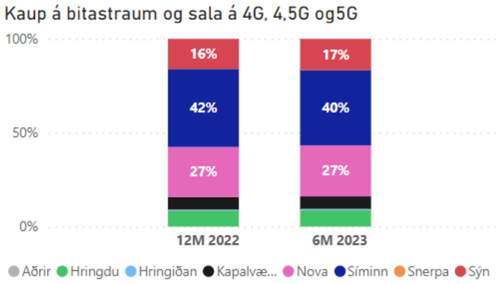




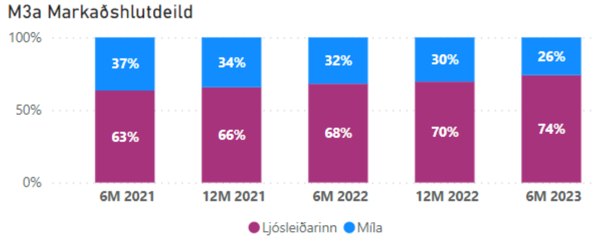


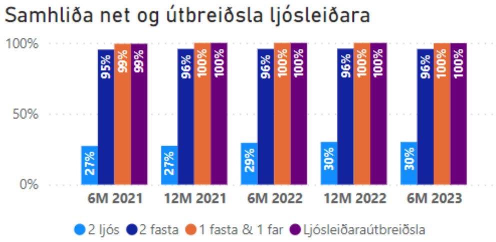


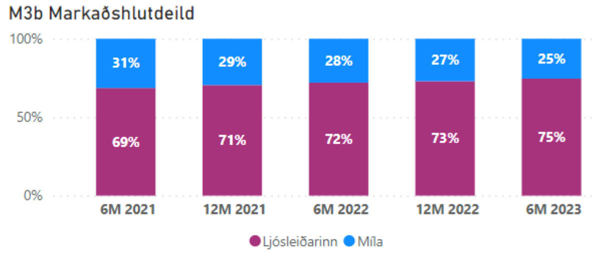


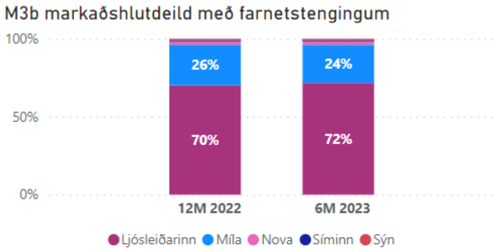


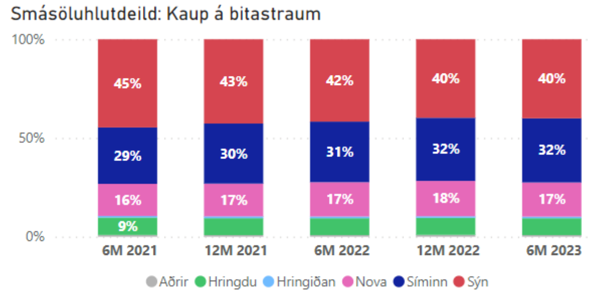
2.27 Seltjarnarnesbær

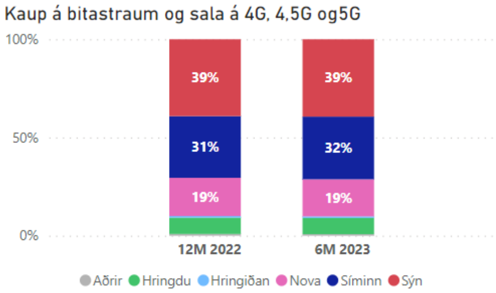




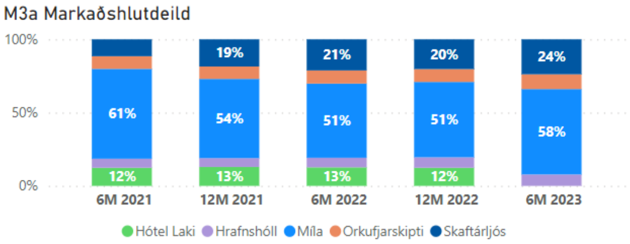


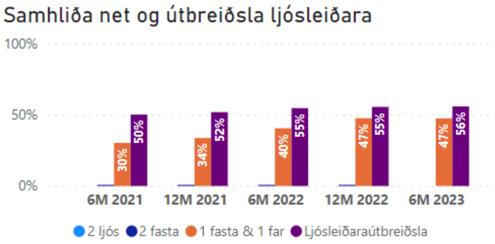


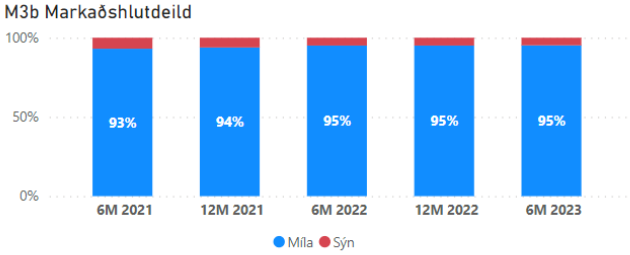


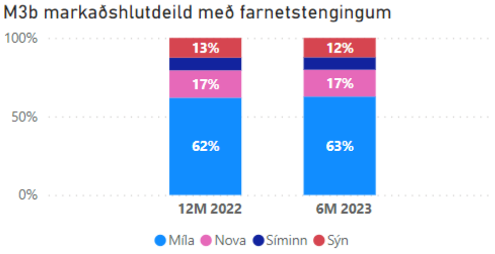


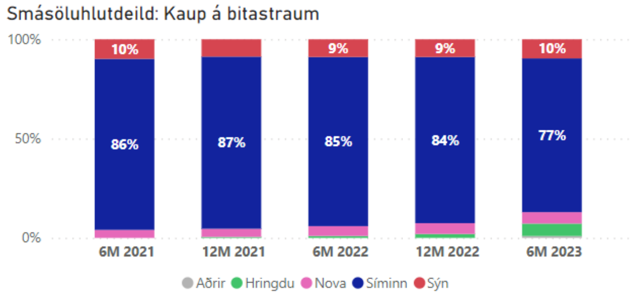
2.28 Skaftárhreppur[3]

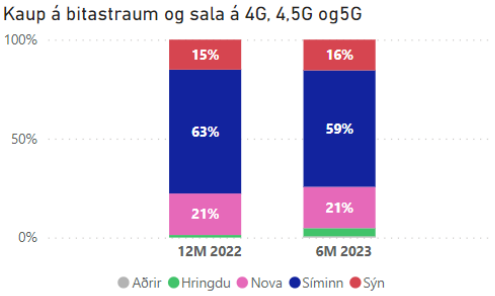






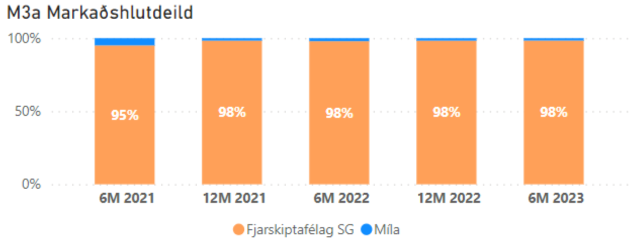


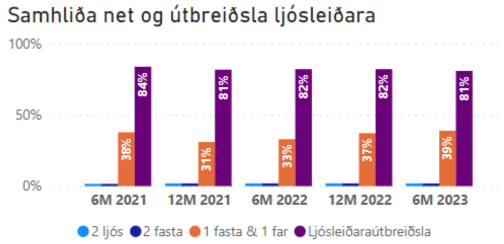


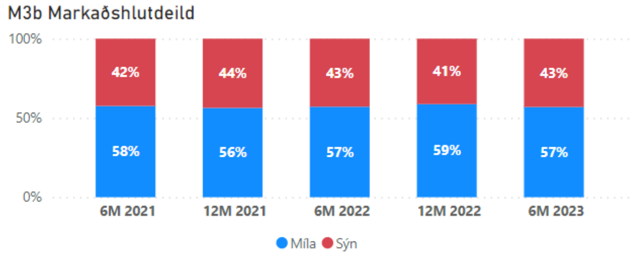


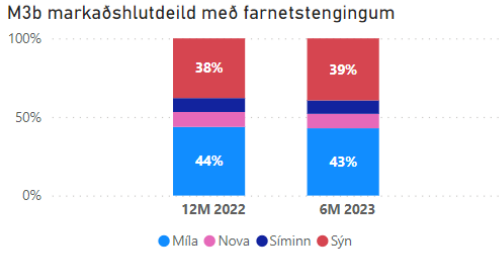
[3] Míla eignaðist ljósleiðaranet Skaftárljóss eftir júní 2023.

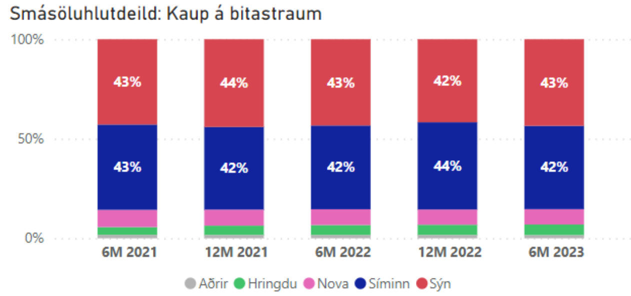
2.29 Skeiða- og Gnúpverjahreppur

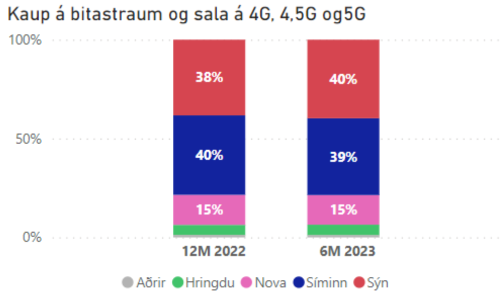




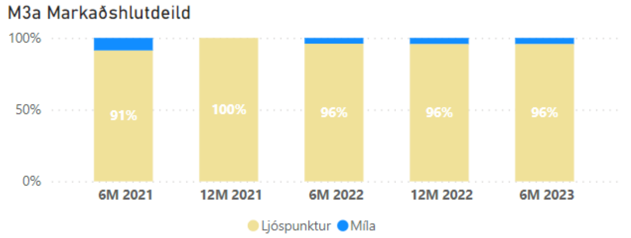


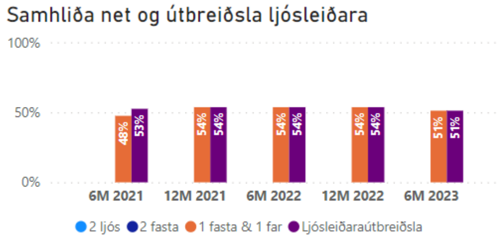


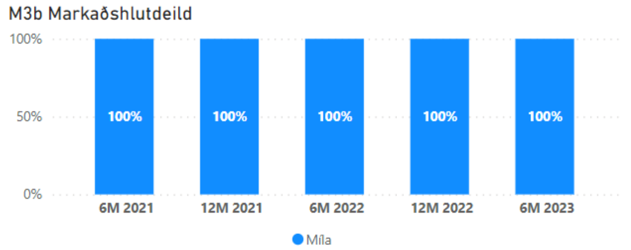


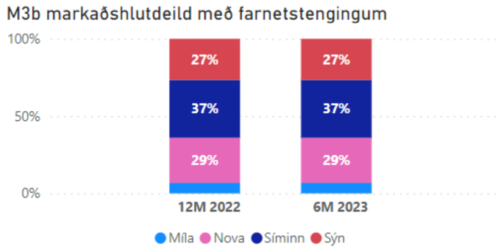


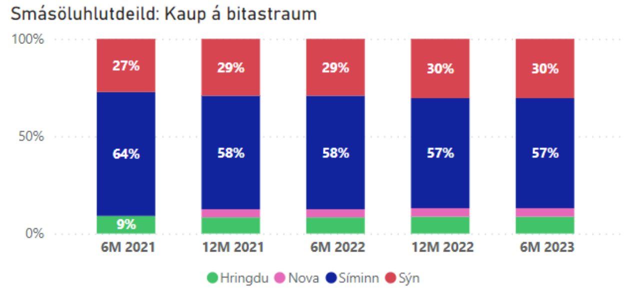
2.30 Skorradalshreppur

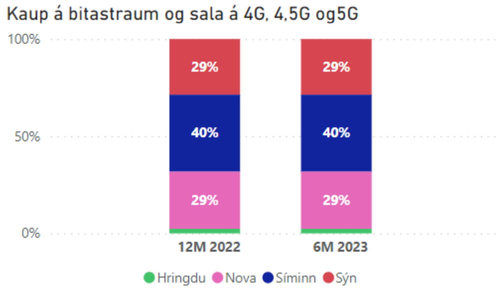




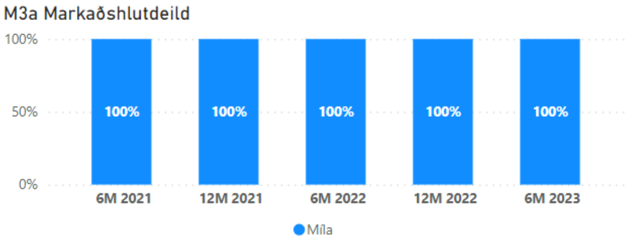


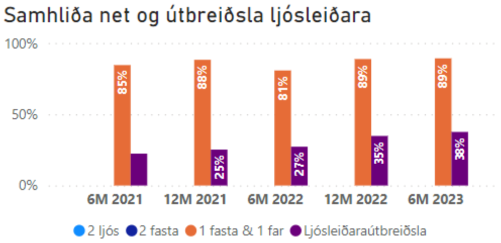


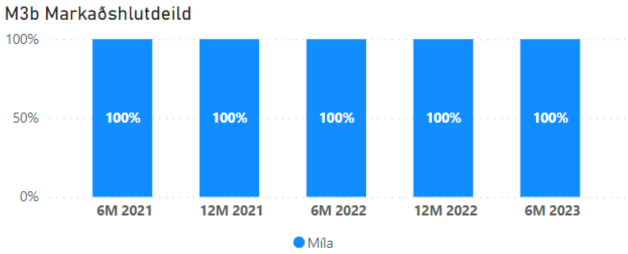


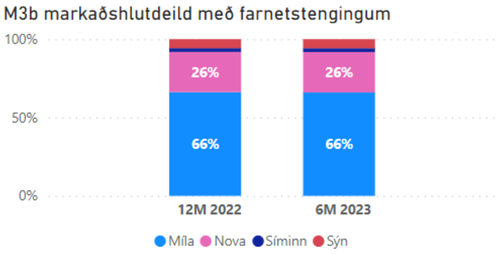


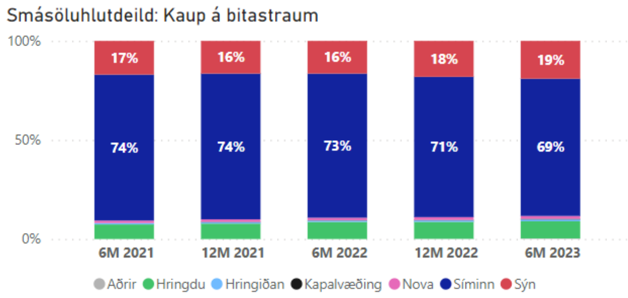
2.31 Suðurnesjabær

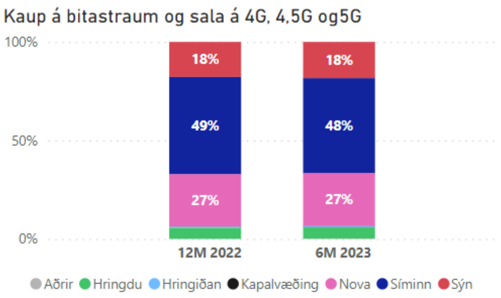




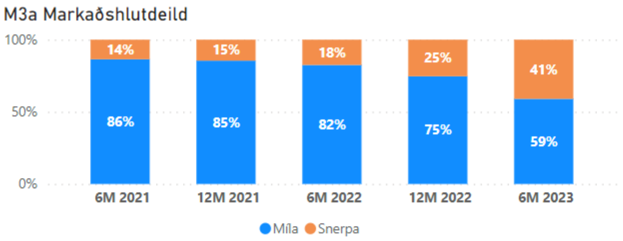


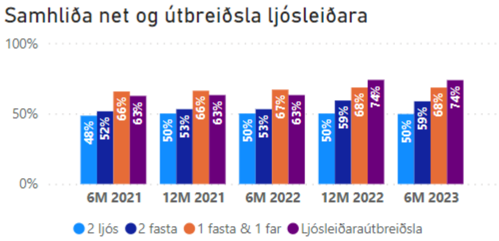


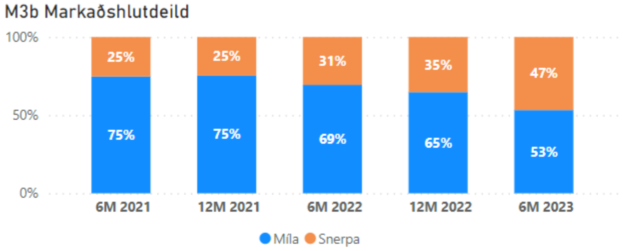


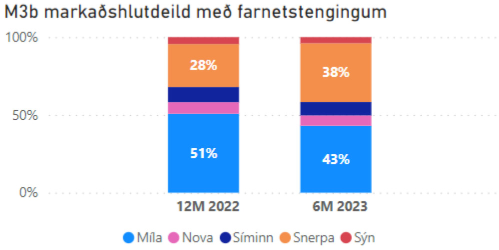


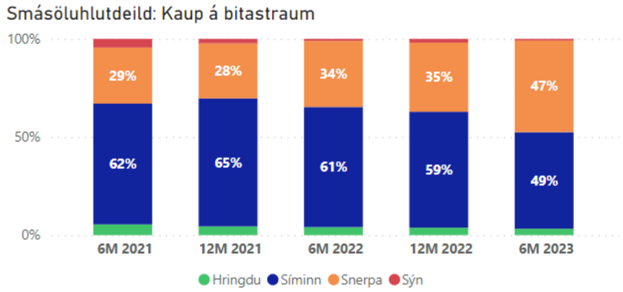
2.32 Súðavíkurhreppur

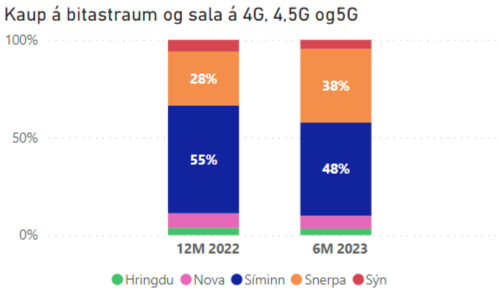




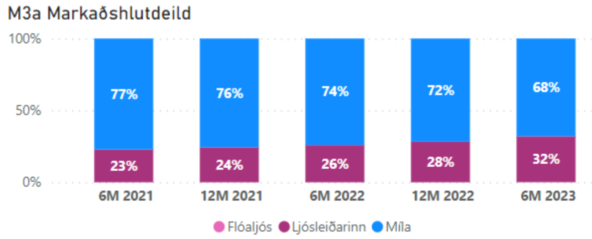


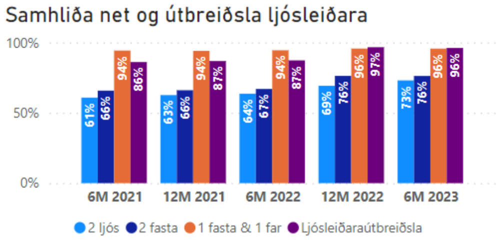


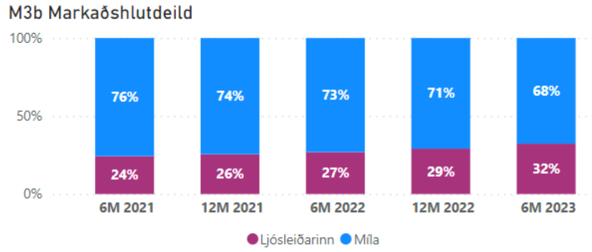


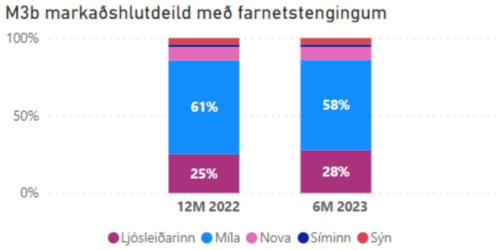


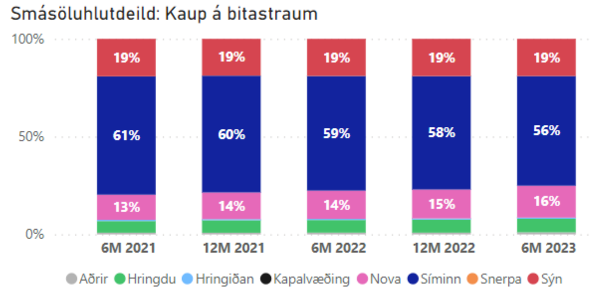
2.33 Sveitarfélagið Árborg

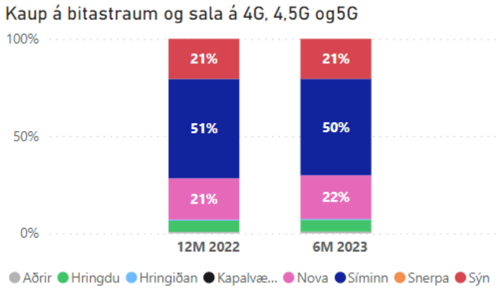




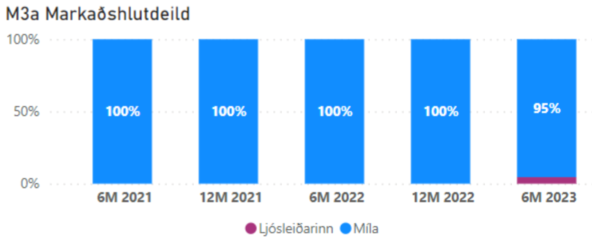


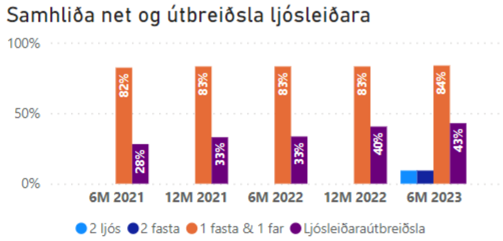


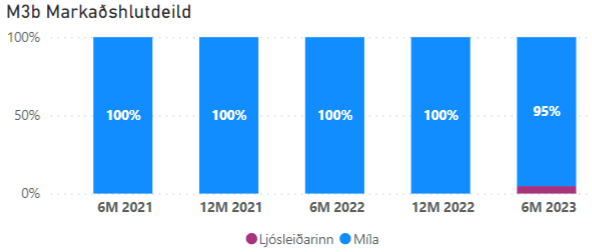


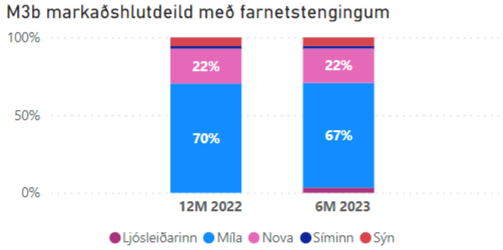


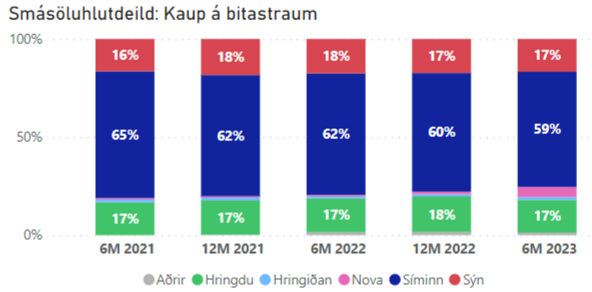
2.34 Sveitarfélagið Vogar

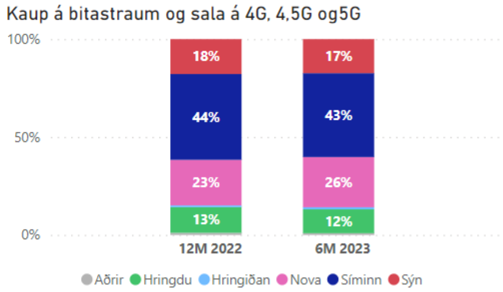




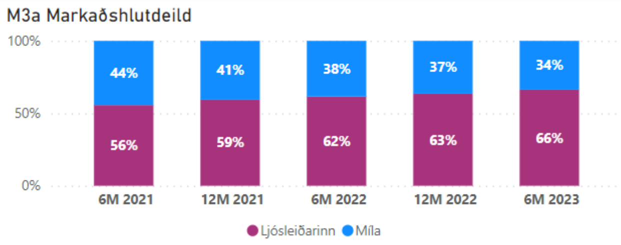


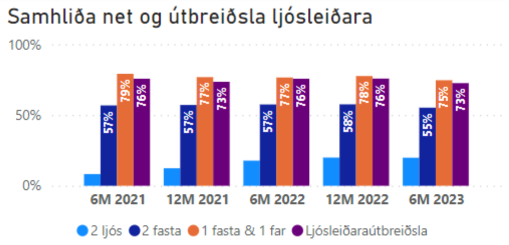


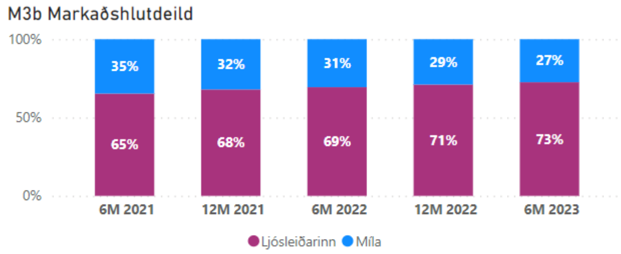


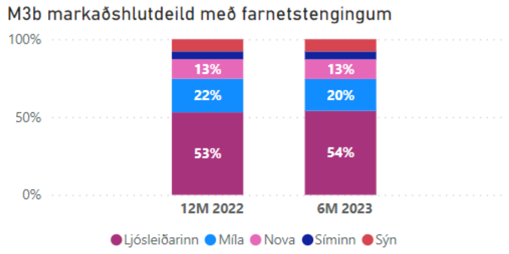


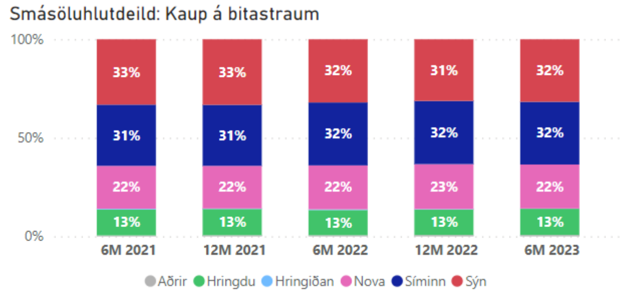
2.35 Sveitarfélagið Ölfus

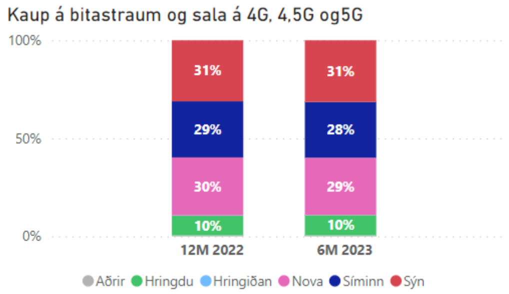




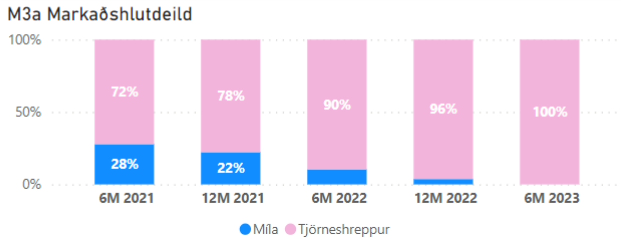


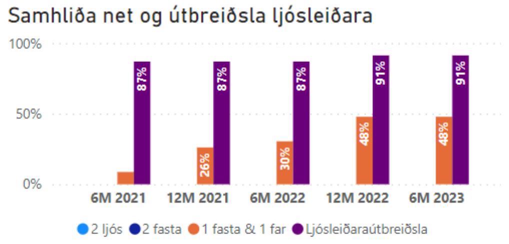


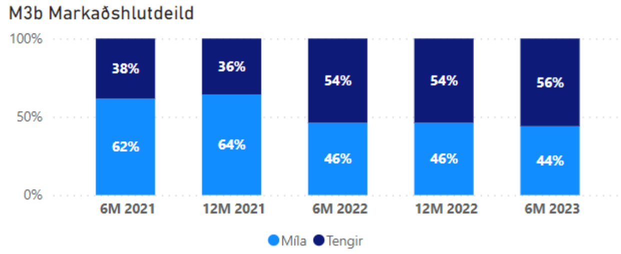


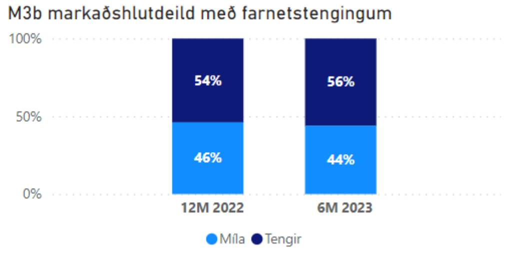


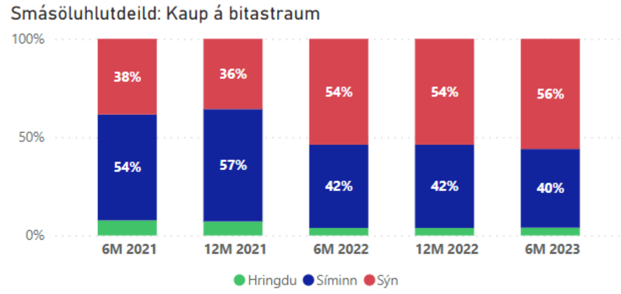
2.36 Tjörneshreppur

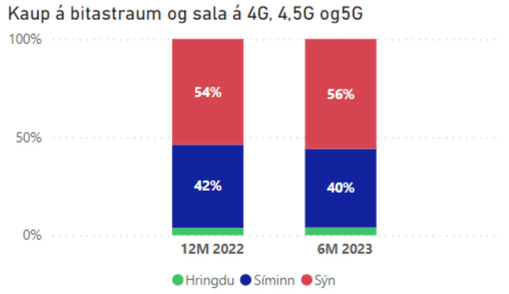












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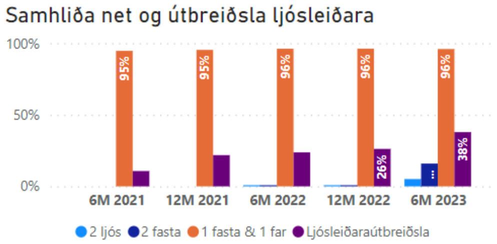
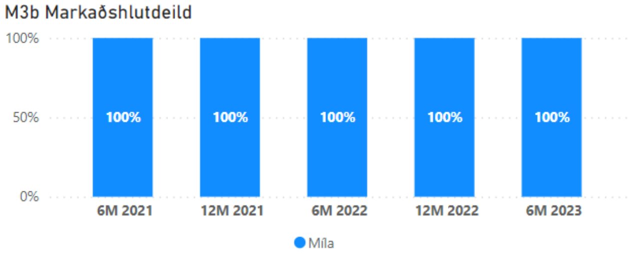
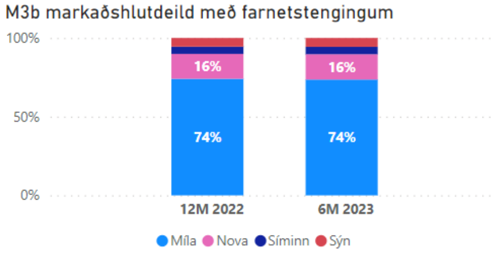
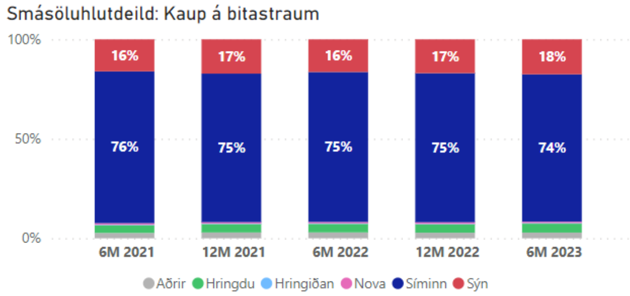
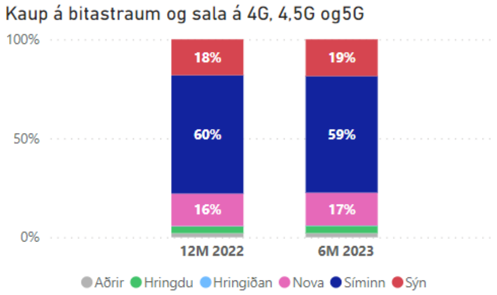


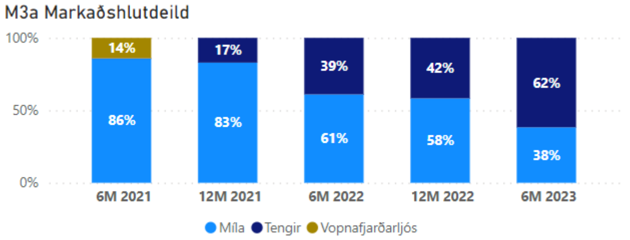


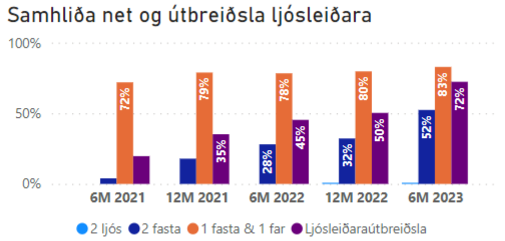


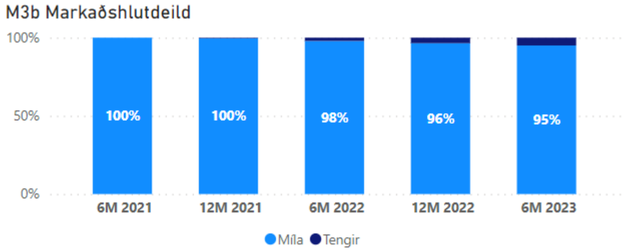


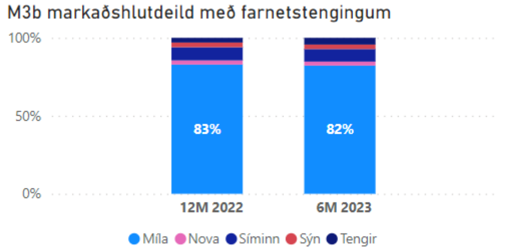


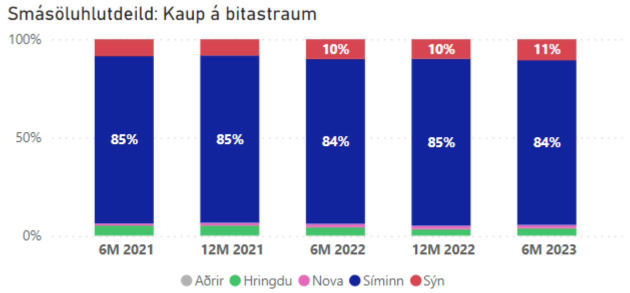
2.38 Vopnafjarðarhreppur

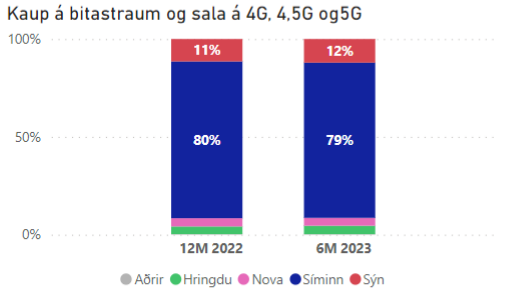












3 Markaður 3b

8. Landfræðilegir markaðir eru 43 á markaði 3b, þeir samanstanda af svæði A þar sem FST mat að samkeppni væri líklega til staðar og svæði B þar sem Míla er með háa markaðshlutdeild. Þau sveitarfélög sem ekki falla undir svæði A og B eða FST vill skoða sérstaklega vegna hugsanlegrar breytinga í sveitarfélaginu eru skilgreind sem einn landfræðilegur markaður hvert sveitarfélag. Þessi sveitarfélög eru[4]:

- Akureyrarbær; sjá kafla 2.4 hér fyrir ofan.
- Árneshreppur; sjá kafla 2.5 hér fyrir ofan.
- Ásahreppur; sjá kafla 2.6 hér fyrir ofan.
- Bláskógabyggð; sjá kafla 2.7 hér fyrir ofan.
- Bolungarvíkurkaupstaður; sjá kafla 2.8 hér fyrir ofan.
- Dalabyggð; sjá kafla 2.9 hér fyrir ofan.
- Dalvíkurbyggð; sjá kafla 3.3 hér fyrir neðan.
- Eyja- og Miklaholtshreppur; sjá kafla 2.10 hér fyrir ofan.
- Eyjafjarðarsveit; sjá kafla 3.4 hér fyrir neðan.
- Fjallabyggð; sjá kafla 2.11 hér fyrir ofan.
- Fljótsdalshreppur; sjá kafla 2.12 hér fyrir ofan.
- Flóahreppur; sjá kafla 2.13 hér fyrir ofan.
- Grindavíkurbær; sjá kafla 2.14 hér fyrir ofan.
- Grímsnes- og Grafningshreppur; sjá kafla 2.15 hér fyrir ofan.
- Grundarfjarðarbær; sjá kafla 3.5 hér fyrir neðan.
- Grýtubakkahreppur; sjá kafla 3.6 hér fyrir neðan.
- Hrunamannahreppur; sjá kafla 2.16 hér fyrir ofan.
- Hvalfjarðarsveit; sjá kafla 2.17 hér fyrir ofan.
- Hörgársveit; sjá kafla 3.7 hér fyrir neðan.
- Kjósarhreppur; sjá kafla 2.19 hér fyrir ofan.
- Múlaþing; sjá kafla 2.20 hér fyrir ofan.
- Mýrdalshreppur; sjá kafla 2.21 hér fyrir ofan.
- Norðurþing; sjá kafla 2.22 hér fyrir ofan.
- Rangárþing eystra; sjá kafla 2.23 hér fyrir ofan.
- Rangárþing ytra; sjá kafla 2.24 hér fyrir ofan.
- Reykhólahreppur; sjá kafla 2.25 hér fyrir ofan.
- Seltjarnarnesbær; sjá kafla 2.27 hér fyrir ofan.
- Skaftárhreppur; sjá kafla 2.28 hér fyrir ofan.
- Skeiða- og Gnúpverjahreppur; sjá kafla 2.29 hér fyrir ofan.
- Skorradalshreppur; sjá kafla 2.30 hér fyrir ofan.
- Suðurnesjabær; sjá kafla 2.31 hér fyrir ofan.
- Súðavíkurhreppur; sjá kafla 2.32 hér fyrir ofan.
- Svalbarðsstrandarhreppur; sjá kafla 3.8 hér fyrir neðan.

[4] Fyrir hvert sveitarfélag er tilvísun í kaflanúmer með gögnum fyrir það sveitarfélag.

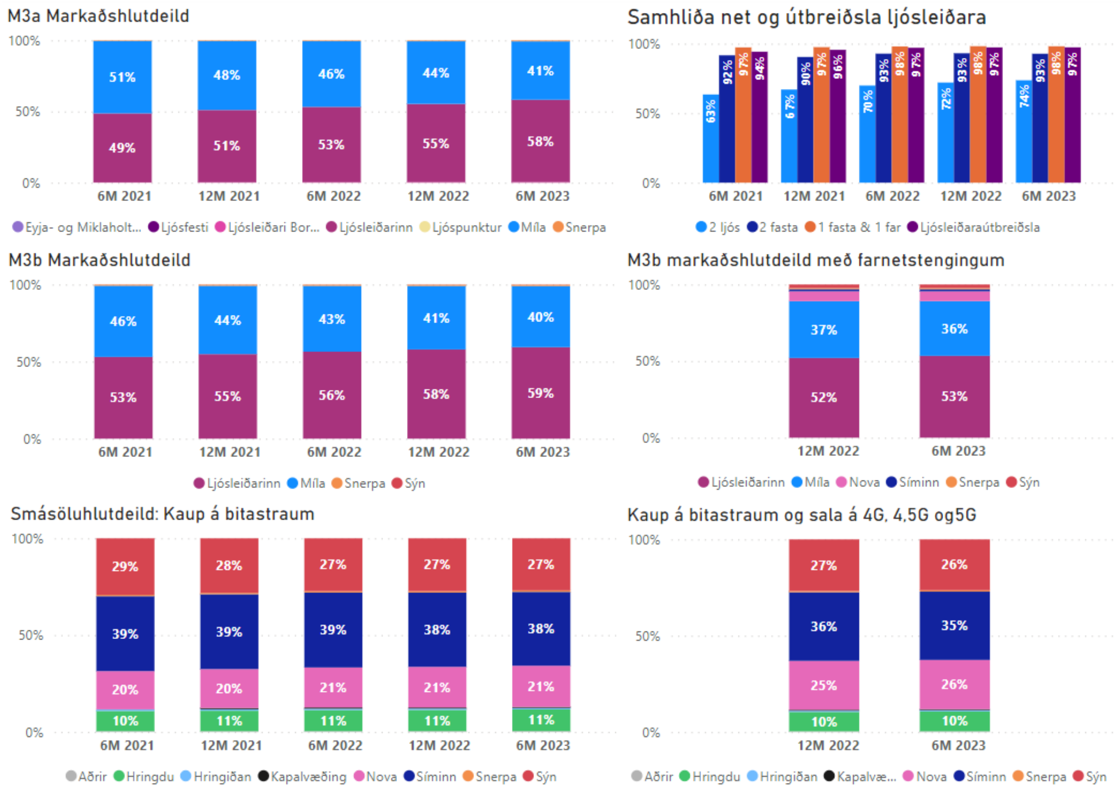
- Sveitarfélagið Árborg; sjá kafla 2.33 hér fyrir ofan.
- Sveitarfélagið Vogar; sjá kafla 2.34 hér fyrir ofan.
- Sveitarfélagið Ölfus; sjá kafla 2.35 hér fyrir ofan.
- Tjörneshreppur; sjá kafla 2.36 hér fyrir ofan.
- Vestmannaeyjabær; sjá kafla 2.37 hér fyrir ofan.
- Vesturbyggð; sjá kafla 3.9 hér fyrir neðan.
- Vopnafjarðarhreppur; sjá kafla 2.38 hér fyrir ofan.
- Þingeyjarsveit; sjá kafla 3.10 hér fyrir neðan.

9. Hér á eftir eru uppfærðar tölur fyrir svæði A og B og þau sveitarfélög sem tilgreind eru hér að ofan og ekki eru birtar tölur fyrir í kaflanum hér að ofan.

3.1 Svæði A

10. Eftirfarandi 10 sveitarfélög falla undir svæði A:

- Akraneskaupstaður
- Borgarbyggð
- Garðabær
- Hafnarfjarðarkaupstaður
- Hveragerðisbær
- Ísafjarðarbær
- Kópavogsbær
- Mosfellsbær
- Reykjanesbær
- Reykjavíkurborg

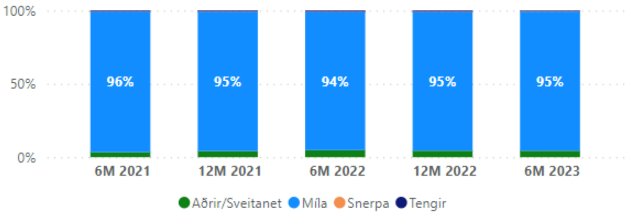


3.2 Svæði B

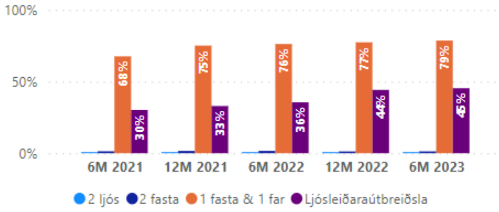
11. Eftirfarandi 13 sveitarfélög falla undir svæði B:

- Fjarðabyggð
- Húnabyggð
- Húnaþing vestra
- Kaldrananeshreppur
- Langanesbyggð
- Skagabyggð
- Skagafjörður
- Snæfellsbær
- Strandabyggð
- Sveitarfélagið Hornafjörður
- Sveitarfélagið Skagaströnd
- Sveitarfélagið Stykkishólmur
- Tálknafjarðarhreppur

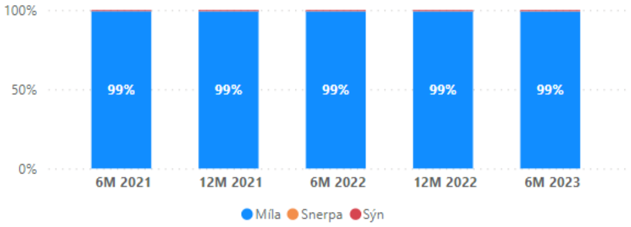
M3a Markaðshlutdeild



Samhliða net og útbreiðsla ljósleiðara



M3b Markaðshlutdeild



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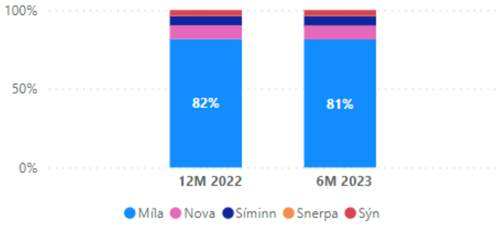

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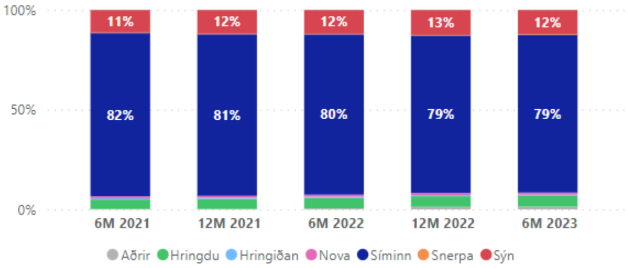
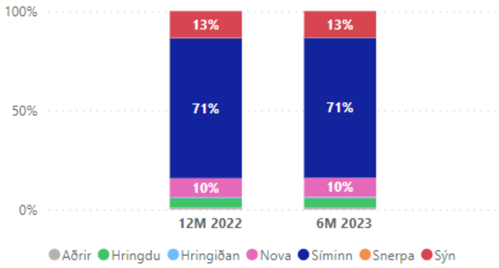
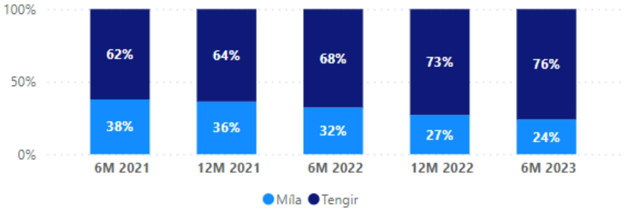


Kaup á bitastraum og sala á 4G, 4,5G og5G

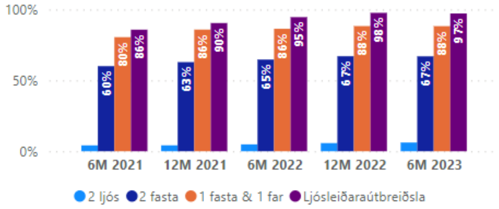


3.3 Dalvíkurbyggð

M3a Markaðshlutdeild



Samhliða net og útbreiðsla ljósleiðara



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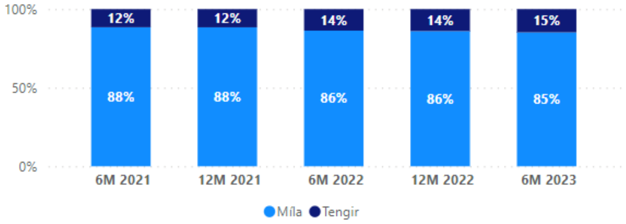

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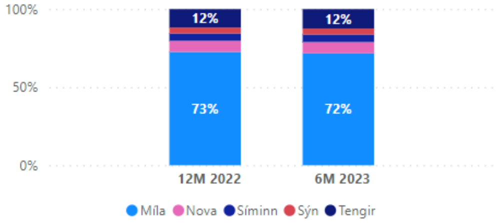
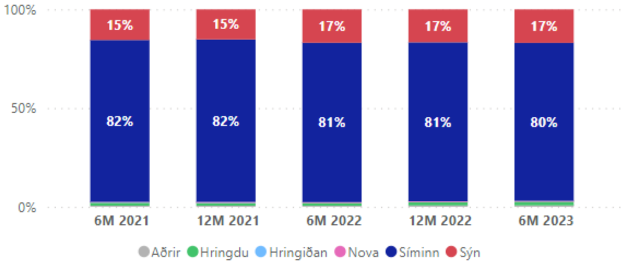
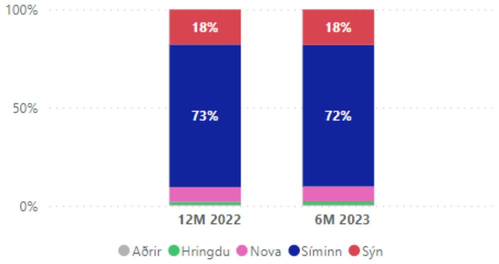


Smásöluhlutdeild: Kaup á bitastraum

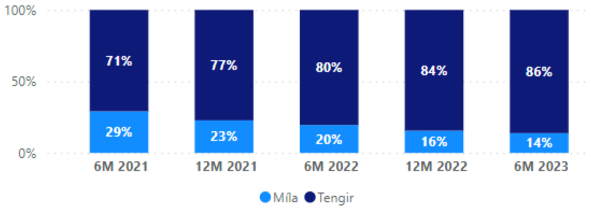


Kaup á bitastraum og sala á 4G, 4,5G og5G



3.4 Eyjafjarðarsveit

M3a Markaðshlutdeild



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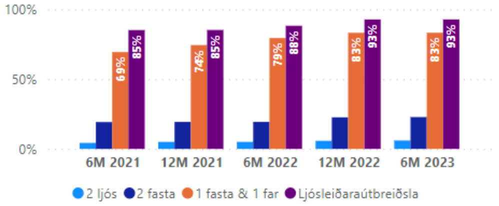

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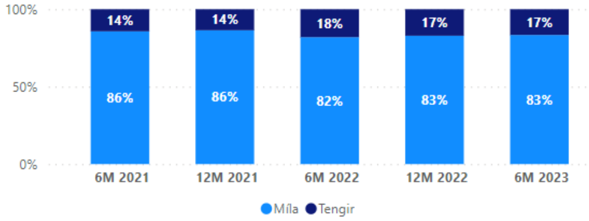

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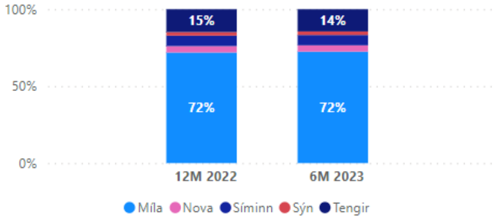

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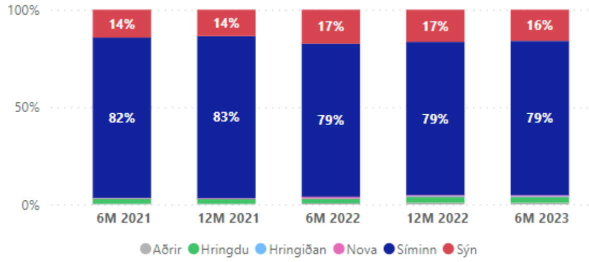
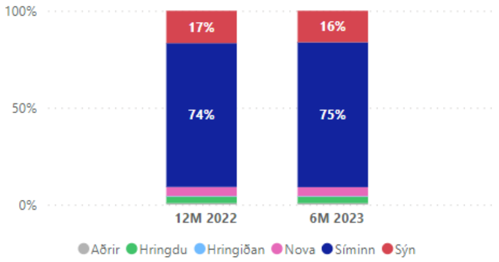
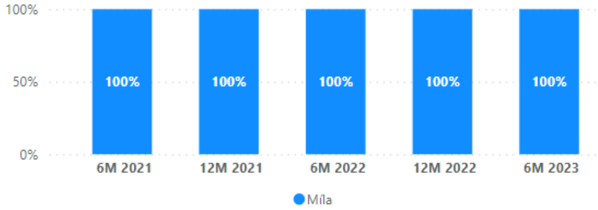


Kaup á bitastraum og sala á 4G, 4,5G og5G



3.5 Grundarfjarðarbær

M3a Markaðshlutdeild



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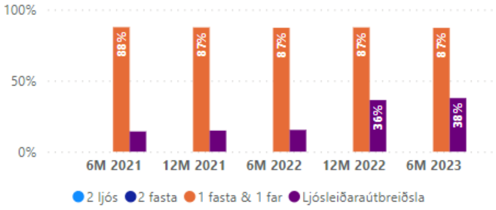

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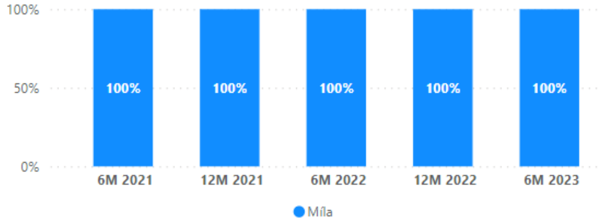
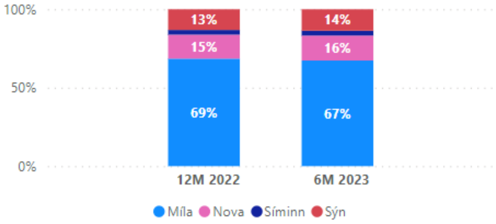


M3b markaðshlutdeild með farnetstengingum



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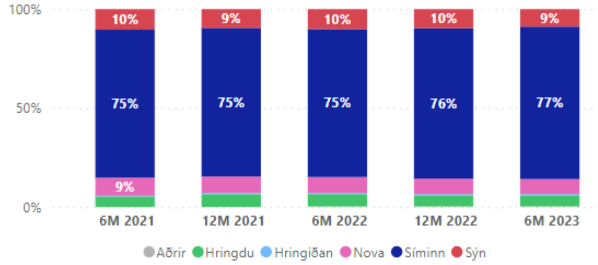
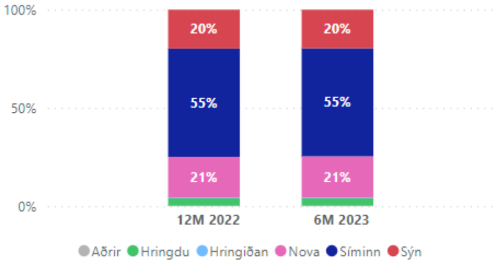
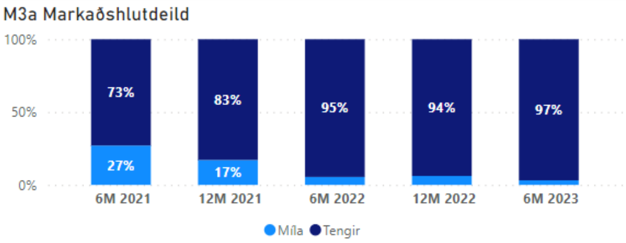
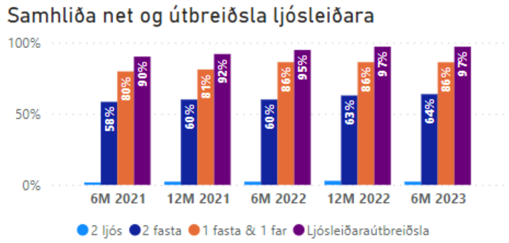


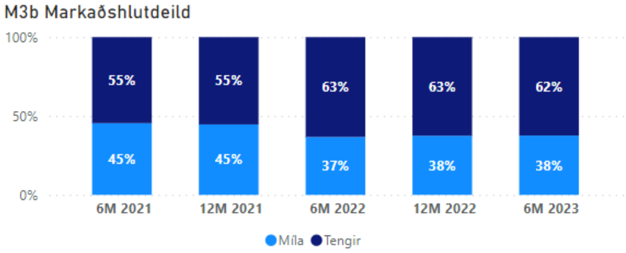
Kaup á bitastraum og sala á 4G, 4,5G og5G

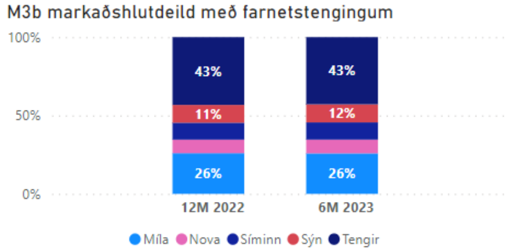


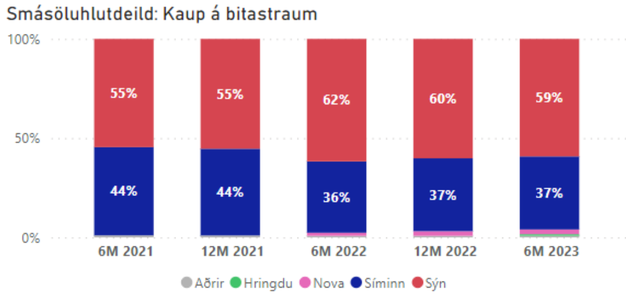
3.6 Grýtubakkahreppur

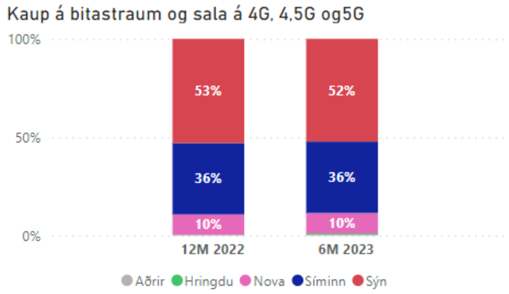




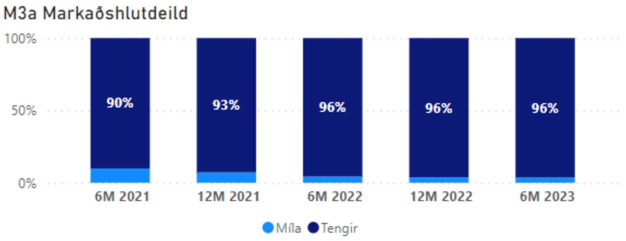


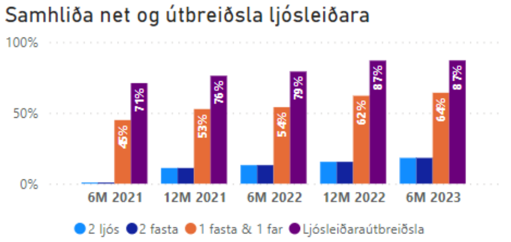


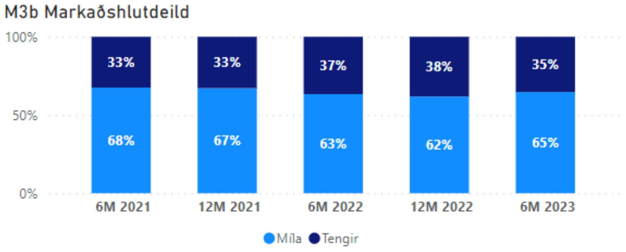


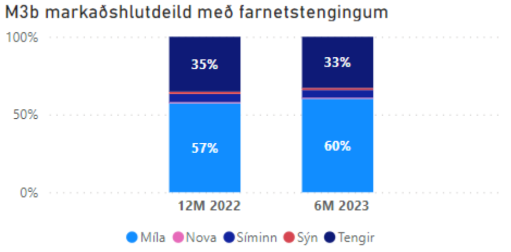


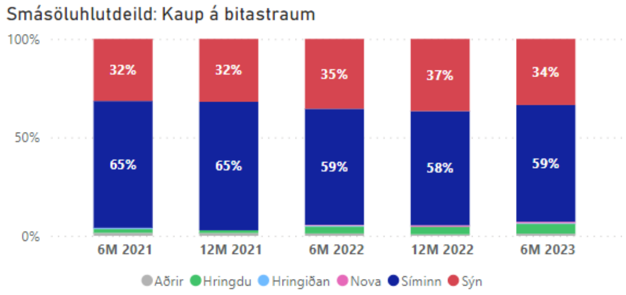
3.7 Hörgársveit

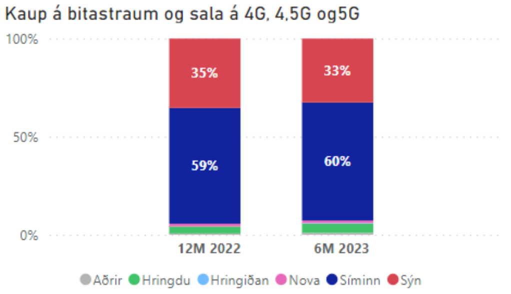




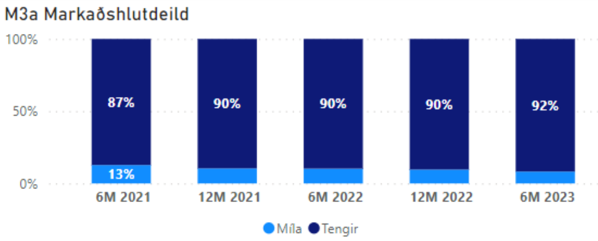


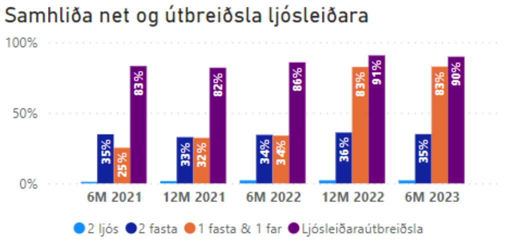


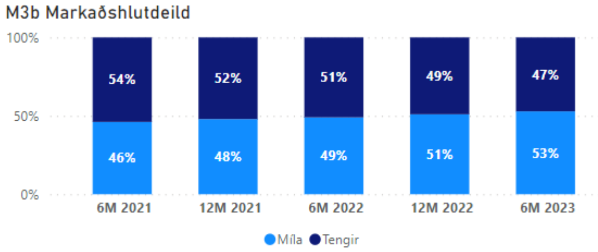


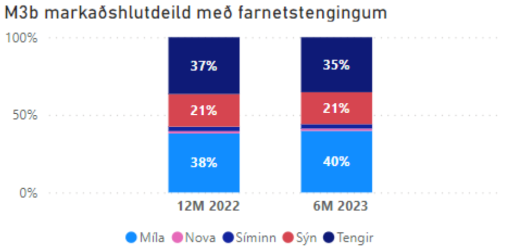


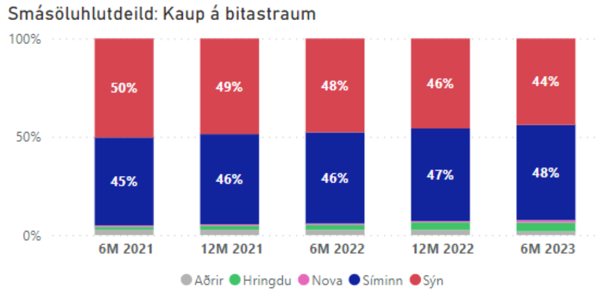
3.8 Svalbarðsstrandarhreppur

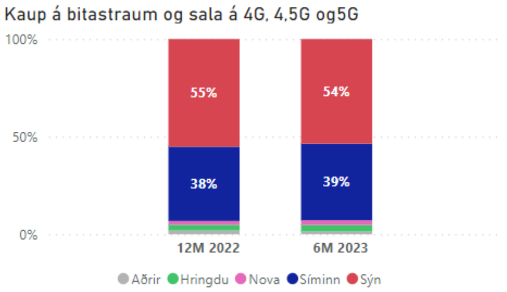




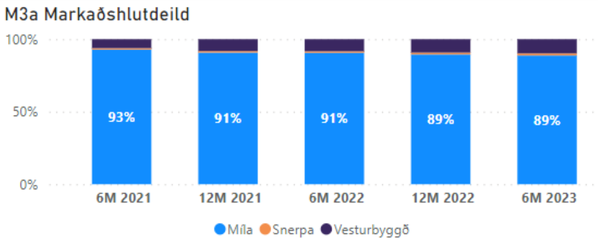


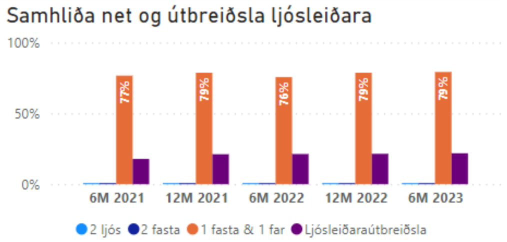


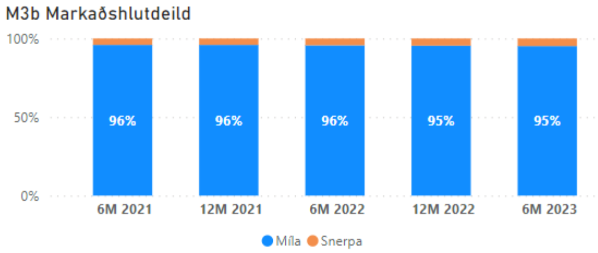


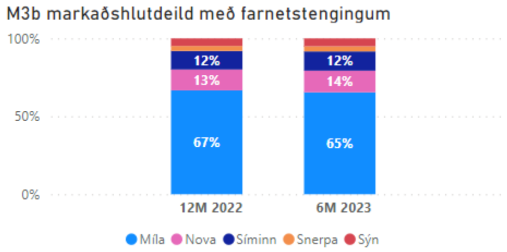


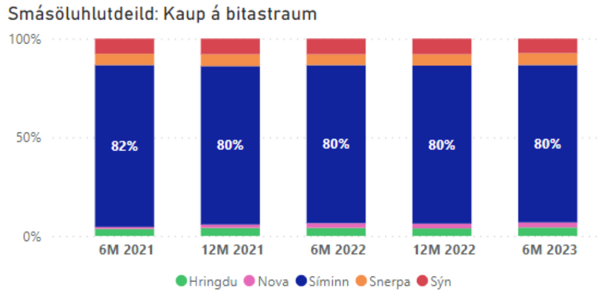
3.9 Vesturbyggð

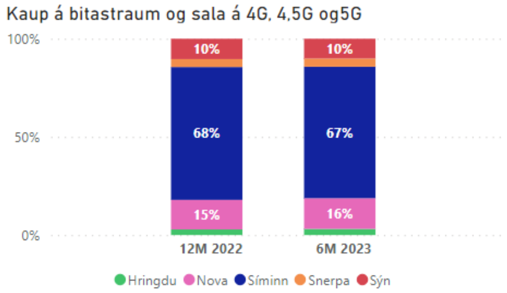












3.10 Þingeyjarsveit