

# Denmark Telecommunications Report 2010

<https://marketpublishers.com/r/D5B3D86C2BDEN.html>

Date: May 2010

Pages: 94

Price: US\$ 1,175.00 (Single User License)

ID: D5B3D86C2BDEN

## Abstracts

BMI's 2010 report on the Danish telecommunications industry contains updated growth forecasts that predict the development of the country's mobile, fixed-line, broadband, internet and 3G subscriber markets over the next five years. Our forecasts, which have been extended to the end of 2014, are based on H109 regulatory data, as well as year-end data published by Denmark's leading telecoms service providers; these include the Danish incumbent operator TDC, as well as Norway's Telenor and Sweden/Finland's TeliaSonera.

At the end of 2009, Denmark's four mobile network operators were estimated to serve a total of 7.377mn subscribers. This is equivalent to a penetration rate of 135.2%. During 2009, the country's mobile subscriber base grew by 9.5%. Growth was higher than in 2008, when the sector expanded by 8.1%. The main reason for the stronger growth appears to a rapid expansion in the number of prepaid cards on the market; Denmark has a significant number of MVNOs that provide low-cost mobile prepaid services in conjunction with one the country's network operators. Our latest forecast for Denmark's mobile market assumes that MVNOs will continue to fuel growth over the next few years. Just as the number of mobile telephony customers in Denmark has continued to grow, the market for traditional fixed-line services based on PSTN and ISDN technology has been shrinking. The Danish fixed-line market declined at a record rate of around 19% in 2009. The demise of the fixed-line sector has been driven by the growing use of substitute services such as VoIP and mobile broadband.

BMI estimates that Denmark had more than 2.59mn broadband subscribers at the end of 2009. This gives the country a broadband penetration rate of 47.5%, up from 42.8% in 2008. In 2009, the Danish internet market became increasingly shaped by the spread of mobile broadband access, while demand for xDSL and cable services continued to slow. According to Denmark's telecoms regulator, the National IT and Telecom Agency (Telestyrelsen), the number of mobile broadband internet connections reached 419,000

by the end of June 2009, up by 36% since the start of the year. At the end of H109, mobile broadband subscriptions accounted for 17% of the total broadband market. Incumbent operator TDC reported that it experienced a boom in mobile broadband usage in 2009, primarily from notebooks and laptops. BMI's forecast for Denmark's broadband market assumes that xDSL and cable services will decline in relative importance over the next five years. By contrast, mobile broadband subscriptions and connections based on fibre optics will continue to increase. Mobile broadband services will benefit from the deployment of stronger network coverage and faster data transmission speeds.

Denmark sits in sixth position in BMI's Business Environment Ratings for Western Europe. With the exception of the Telecoms Market category, Denmark scores above average in all of the categories evaluated by BMI. In the Country Risk category, Denmark has the highest score in the region.

## Contents

Executive Summary	5
SWOT Analysis	6
Denmark Mobile SWOT Analysis	6
Denmark Wireline SWOT Analysis	7
Denmark Political SWOT	8
Denmark Economic SWOT	9
Business Environment Analysis	10
Western Europe	10
Denmark	13
Industry Forecast Scenario	15
Mobile	15
Table: Denmark Telecoms Sector – Mobile – Historical Data & Forecasts	15
Fixed Line	17
Table: Denmark Telecoms Sector – Fixed Line – Historical Data & Forecasts	17
Internet	19
Table: Denmark Telecoms Sector – Internet – Historical Data & Forecasts	19
Market Data Analysis	21
Mobile	21
Table: Denmark Mobile Subscribers, Q308-Q409 ('000)	24
Table: Subscriber Net Additions, Q308-Q409 ('000)	25
Customer Divisions	26
ARPU	27
3G	28
Table: Danish 3G Subscribers By Operator, 2005-2008	30
Mobile Contract Wins	31
Table: Mobile Contract Wins	31
Mobile Content	33
Regional Outlook	33
Data Revenues Failing To Reflect Increased Data Usage	34
3G And 3G Dongle Customers Soaring	35
Country Outlook	37
Value-Added Services Timeline	40
Table: Selected VAS Services	40
Mobile Operator Data	41
Table: Mobile Market Overview	41
TDC Mobil	41
Telenor Denmark	42

TeliaSonera Mobile	43
3 Denmark	44
Fixed Line	45
Table: Alternative Fixed-Line Operators' Subscriber Growth, 2006-2009	47
Broadband	49
Table: Broadband Accesses By Technology Type, 2005-2009	50
Table: Broadband Subscribers By Service Provider, 2006-2009	51
Cable TV	52
FTTH	53
WiMAX	53
Mobile Broadband	54
Wireline Contract Wins	55
Table: Wireline Contract Wins	55
Regulatory Environment	57
Overview	57
Denmark: Regulatory Bodies And Their Responsibilities	57
Legislation	57
Recent Developments	59
Competitive Landscape	61
Market Overview	61
Key Players	61
Table: Key Players – Denmark Telecoms Sector	61
Table: Selected Operator Financial Parameters	62
Company Monitor	63
Comparison of Key Financial Data (2008 - 2009)	63
Subtitle: NSN Net Sales By Geography (Q409)	64
Subtitle: Key Spectrum Auctions In Western Europe (2010 - 2011)	65
Major Nokia Siemens Networks Contract Awards, Q409 - Q110	67
Operator Profiles	68
Appendix:	86
Regional Telecommunications Penetration Overview	86
Fixed Line	86
Table: Regional Broadband Penetration Overview	86
Internet	87
Table: Regional Broadband Penetration Overview	88
Mobile	88
Table: Regional Mobile Penetration Overview	89
Glossary Of Terms	90
Table: Glossary Of Terms	90

BMI Methodology 91

How We Generate Our Industry Forecasts 91

Table: Key Indicators For Telecommunications Industry Forecasts 91

Telecoms Business Environment Ratings 92

Table: Weighting Of Indicators 93

Table: Ratings Indicators 94

Sources 94

## I would like to order

Product name: Denmark Telecommunications Report 2010

Product link: <https://marketpublishers.com/r/D5B3D86C2BDEN.html>

Price: US\$ 1,175.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/D5B3D86C2BDEN.html>