Telecommunication Markets in the Nordic and Baltic Countries 2014
About the database

- The database was established in 2007
  - The Baltic States are included since spring 2013
  - A descriptive database

- Consists of a selected number of variables that are comparable between the Nordic and Baltic countries
  - Graphs describing each country are displayed from the point of time (year) where these statics are available. Because of this, the length of time series may vary

- A dynamic database that will change as the telecom markets develop
- The figures are collected and validated by the Nordic-Baltic working group on statistics and definitions
- If not stated otherwise the source for all figures are the relevant national regulatory agencies and/or the national statistical agencies of each country
- Graphs include figures for both private and business customers
- When comparing penetration rates note that the population is decreasing in Lithuania and Estonia while increasing in all other countries

For more detailed information see the statistical portal under ‘Tables’: http://statistik.pts.se/PTSnordic/Nordicbaltic2014/
1. Mobile services
Development of mobile services

- The growth of mobile subscriptions has stagnated in most of the countries.
- SMS message volumes have decreased in all countries, except Estonia, where there has been a modest increase during the last three years. This decrease is probably mainly due to the increased use of various messaging services. In Estonia the use of SMS messages per capita has been significantly lower than in the other countries.
- Data volumes transferred over mobile networks are still increasing fast in all countries. Lithuania has the lowest number of dedicated data subscriptions per capita, and Finland the highest. This may be one of the reasons behind the relatively large difference in Gbyte per capita.
1.1 Mobile subscriptions per capita

Includes GSM/UMTS/LTE subscriptions for voice and mobile broadband that have been active within the last 3 months of the period. Pre-paid subscriptions are also included. The decrease for Lithuania and Estonia in 2013 is due to changes in definitions from the operators.
1.2 Mobile call minutes per capita in a month
1.3 Average number of SMS messages sent per capita in a month

Graph showing the average number of SMS messages sent per capita in a month for different countries from 2001 to 2014. The countries included are Sweden, Norway, Finland, Denmark, Iceland, Estonia, Lithuania, and Latvia.
1.4 Gbytes of data transferred over mobile networks per capita in a month
2. Fixed Call Services
Development of fixed call services

- The number of fixed telephone subscriptions per capita is decreasing in all countries.

- There are major differences between the countries in the number of IP telephony (VoIP) subscriptions per capita and the numbers are developing very differently as well. In Sweden and Iceland the number of subscriptions is still growing. Nevertheless, Sweden has more than twice as many VoIP subscriptions per capita than Iceland. In Estonia, Lithuania, Latvia and Finland the number of VoIP subscriptions is low compared to other countries. VoIP subscriptions are often sold in bundles, e.g. with a fixed broadband connection and TV.

- The number of fixed calls is declining in all countries and the use of mobile telephony is more and more dominant also in terms of minutes. The share is well over 60 percent even in Iceland, Sweden and Denmark, where shares of mobile minutes are lower and fixed penetration rates are higher than in the other countries. Finland has the highest share of mobile minutes of all originated minutes with over 94 percent in 2014. Latvia and Lithuania are second and third with shares of 93 and 89 percent.
2.1 Fixed telephony subscriptions per capita

Includes PSTN, ISDN and broadband telephony subscriptions (VoIP)
2.2 Broadband telephony (VoIP) subscriptions per capita

[Graph showing broadband telephony (VoIP) subscriptions per capita for various countries from 2004 to 2014. The countries shown are Sweden, Norway, Finland, Denmark, Iceland, Estonia, Lithuania, and Latvia.]
2.3 Fixed call minutes per capita in a month
2.4 Share of mobile minutes of all originated minutes

All originated minutes are the sum of all fixed minutes and all mobile minutes.
3. Broadband Services
Penetration of broadband services

- Denmark has most fixed broadband subscriptions per capita with a penetration of well over 40 percent. This share is over 30 percent in most of the countries - only Estonia and Latvia have less than 30 percent of fixed broadband penetration. The number of fixed broadband subscriptions are still growing in all countries, especially in Lithuania where penetration rate grew 10 percent in 2013 and about 14 percent during 2014. In all other countries growth was up to 4 percent during 2014.

- When adding the dedicated mobile broadband subscriptions to fixed broadband subscriptions, Finland has the highest broadband penetration rate with 0,65 subscriptions per capita and Denmark is second with 0,63 subscriptions per capita. The penetration in Lithuania is growing rapidly because of dedicated mobile subscriptions. The share of total penetration rate is growing steadily in other countries as well.

- When comparing the penetration of dedicated mobile data subscriptions alone Finland is a little more ahead of the rest of the countries with 0,33 subscriptions per capita. Sweden and Lithuania have the second highest penetration of 0,23. The numbers are growing in all countries except in Norway.
Development of faster broadband services

- The share of fiber subscriptions of total fixed broadband subscriptions was highest in Lithuania and Latvia with over 50 percent in 2014, while Sweden had the third highest penetration.

- The penetration rate for subscriptions with speeds of 10 Mbps or more downstream are increasing in all countries. Iceland and Denmark are still at the top with respectively 0,35 and 0,36 subscriptions per capita, respectively. Norway is third with 0,28 subscription per capita.

- The penetration rate for subscriptions with speeds of 30 Mbps or more downstream are also increasing in all countries, although there are significant differences between the countries. Iceland had the highest penetration rate at 0,26. Sweden and Lithuania were second with 0,17 and 0,16 subscriptions per capita respectively in 2014.

- When it comes to broadband penetration for subscriptions with speeds of 100 Mbps or more downstream Sweden is well above the other countries. The Swedish penetration rate for 100 Mpbs reached 0,13 subscriptions per capita in 2014.

- IPTV penetration is highest in Iceland where there is no cable-tv. In average 26 out of 100 Icelandic inhabitants have an IPTV subscription. Estonia is second with 13 out of a 100 inhabitants. The rest of the countries are rather close with rates from 5 to 9 subscriptions per a 100 inhabitants.
3.1 Fixed broadband subscriptions per capita
3.2 Total number of broadband subscriptions per capita

Includes all fixed subscriptions and dedicated data subscriptions in mobile networks. Finnish data only available for 2014.
3.3 Number of mobile broadband subscriptions per capita

Includes only dedicated data subscriptions. Finnish data only available for 2014.
3.4 Number of mobile broadband subscriptions and add-on data packages per capita
3.5 Share of fiber subscriptions of total fixed broadband subscriptions

Fiber includes fiber-LAN networks (LAN connected to fiber)
3.6 Fixed broadband subscription with a marketed capacity of 10 Mbps or more per capita

Actual speed for xDSL subscriptions depends on factors like distance from the central exchange etc. This is the case in all countries.
3.7 Fixed broadband subscription with a marketed capacity of 30 Mbps or more per capita

Actual speed depends on factors like distance from the central exchange etc. This is the case for xDSL subscriptions in all countries.
3.8 Fixed broadband subscription with a marketed capacity of 100 Mbps or more per capita

Norwegian data only available for 2014.
3.9 Number of IPTV subscriptions per capita

Numbers includes subscriptions both for fiber and xDSL
4. Market shares
4.1 Market share of leading mobile operator

Operator with the biggest market share in the period based on subscriptions. Market share includes subsidiaries. Mobile subscriptions includes ordinary mobile subscriptions and dedicated data subscriptions.

- Sweden (TeliaSonera AB all periods)
- Norway (Telenor all periods)
- Finland (TeliaSonera Finland 2006-2008, Elisa 2009-2014)
- Denmark (TDC all periods)
- Iceland (Síminn all periods)
- Estonia (EMT AS 2011-2014)
- Lithuania (Omnitel 2007-2012, Tele2 2013-2014)
- Latvia (Latvijas Mobilais Telefons 2013-2014)
4.2 Market share of leading operator in fixed telephony

Operator with the biggest market share in the period based on subscriptions. Market share of subscriptions in the period. Market share includes subsidiaries. Fixed telephony subscriptions includes PSTN, ISDN and broadband telephony subscriptions (VoIP).
4.3 Market share of leading operator in fixed broadband services

Operator with the biggest market share in the period based on subscriptions. Market share includes subsidiaries. *In Finland leading operator: Elisa 2006-2009 and 2013, Telia Sonera Finland 2010-2011, 2012 and 2014 Telia Sonera Finland and Elisa are even.