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The Swedish Telecommunications Market first half-year 2009

Market statistics

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Author
Pamela Davidsson

The Swedish Post and Telecom Agency
Box 5398
102 49 Stockholm
08-678 55 00
pts@pts.se
www.pts.se

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Abstract

The shift in technology in the electronic communications market is still continuing.

One clear indicator of this technology shift is the fact that the number of broadband subscriptions based on fibre or wireless technology is continuing to grow, while the technology that previously drove a large proportion of broadband growth (xDSL) now represents a smaller share of the Internet market. The number of active customers with broadband increased from 3.4 million to 4 million between 30 June 2008 and 30 June 2009, corresponding to growth of approximately 17 per cent. Mobile broadband represented a large part of this increase. The demand for broadband access lines with more than 10 Mbps has continued to rise and now comprises 33 per cent of all broadband subscriptions. The decline in the number of xDSL subscriptions that occurred during the last six months of 2008 is continuing. On 30 June 2009, there were 1.7 million subscriptions for broadband via xDSL, which represents a reduction of two per cent over one year.

However, it should be emphasised that xDSL plays a significant role in the development of the telephony segment of the electronic communications market. Although one clear trend in this segment is that mobile telephony is gaining ground - at the expense of traditional fixed telephony - the number of subscriptions for fixed IP-based telephony is showing strong growth. In this context, xDSL plays an important role: subscriptions for IP-based telephony via xDSL increased by 51 per cent in the past year, from 179 000 on 30 June 2008 to 270 000 on 30 June 2009.

It can be observed from the above that mobile call and broadband services are gaining ground. This is reflected in, for example, the number of outgoing call minutes in the mobile networks continuing to increase and approaching the number of outgoing call minutes in the fixed networks. The total number of mobile subscriptions is also continuing to rise and there are now more than 11 million such subscriptions. This increase is primarily based on a rising number of mobile broadband subscriptions. The number of text messages (SMS) sent from mobile telephones is also continuing to grow. The average customer sent 112 text messages per month, which represents an increase of 33 text messages compared with the 79 text messages sent during the corresponding period in 2008. The Survey of Individuals 2009[1] conducted by the Swedish Post and Telecom Agency (PTS) shows that there has not been any increase in the proportion of individuals who send text messages, but that those who use SMS (regularly) are sending more text messages.

[1] PTS's Survey of Individuals 2009, PTS-ER-2009:28

The number of bundled subscriptions has risen by approximately 20 per cent since the turn of the year. The most pronounced increase has been in packages of three bundled services – broadband, fixed telephony and television. It is now also possible to compare the price of bundled subscriptions on PTS's price comparison website, Telepriskollen.

Key Data

Table 1 Key Data

Key data - the market for electronic communications	1:a halvåret 2009	1:a halvåret 2008	Förändring
Fixed call services			
Subscriptions for fixed telephony *(thousands)*	**5 244**	**5 397**	**-3 %**
of which via WLR *(thousands)*	**972**	**1 009**	**-4 %**
Private	784	843	-7 %
Business	189	166	14 %
of which via IP-telephony *(thousands)*	**865**	**656**	**32 %**
Private	805	613	31 %
Business	59	44	36 %
Pre-selection customers *(thousands)*	**317**	**433**	**-27 %**
Private	189	277	-32 %
Business	128	156	-18 %
Mobile call services and mobile data			
Mobile subscriptions *(thousands)*	**11 250**	**10 421**	**8 %**
Privat	8 833	8 224	7 %
Företag	2 417	2 197	10 %
of which active UMTS subscriptions	4 155	2 825	47 %
of which subscriptions for only mobile packet data	1 090	604	81 %
Number of SMS sent *(millions)*	**6 778**	**4 501**	**48 %**
Number of MMS sent *(millions)*	**67**	**64**	**4 %**
Traffic for mobile data services *(Tbyte)*	**11 664**	**4 729**	**147 %**
Internet services			
Internet subscriptions *(thousands)*	**4 419**	**4 030**	**10 %**
Dial-up subscriptions	411	607	-32 %
Broadband subscriptions	2 918	2 818	4 %
Mobile broadband subscriptions	1 090	604	81 %

1 Aim and method

The purpose of 'The Swedish Telecommunications Market first half-year 2009' is to survey the development of a substantial part of the Swedish market for electronic communications.

The task of the Swedish Post and Telecom Agency (PTS) is, first, to monitor the development of the market for electronic communications, second, to promote competition within the sector. As a step in this work, PTS works with market statistics and market analyses. PTS's work involving the publication of market statistics can also be seen in the light of the fact that it is important for the public, operators and also other businesses and organisations to gain access to statistics and market analyses.

The report 'The Swedish Telecommunications Market' should primarily be viewed as PTS's report presenting market statistics relating to electronic communications. For this reason, a focus is placed on reporting statistics obtained from operators active in this market. 'The Swedish Telecommunications Market first half-year 2009' does not contain any in-depth sections that carefully examine the factors underlying developments occurring within the market. However, a number of figures and diagrams clarifying the numerical material are included.

The compilation of full-year statistics for the years 2000 to 2008 has been undertaken in collaboration with the Swedish Institute for Transport and Communications Analysis (SIKA)[2] and Statistics Sweden (SCB). However, PTS's compilation of half-year statistics is arranged solely by the Agency itself. An important reason for this collaboration is to make matters easier for providers of information by, among other things, reducing the number of questionnaires to be completed. The statistics for the first half-year 2009 were compiled by using a web-based questionnaire.[3]

Duty to reply

A duty to reply was introduced in conjunction with the compilation of information for the year 2003, and a duty to reply has also been introduced for the compilation of half-year information. For information about which operators have submitted responses, see the attached 'Schedule of participants'.

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[2] SIKA is the authority (reporting to the Ministry of Enterprise, Energy and Communications) that is responsible for the official statistics on telecommunications operations (see www.sika-institute.se).
[3] The web questionnaire was prepared in collaboration with Action Dialog Partner AB, and the compilation of information was conducted by Action Dialog Partner AB.

The half-year report is less extensive

The statistics presented in the Swedish Telecommunications Market should be viewed as PTS's description of the market and are based on the data received from the operators. Other public sources have also been used to some extent. The half-year version of the Swedish Telecommunications Market underwent some important changes in 2008 compared with previous half-year reports. Fewer stakeholders are now asked to respond for the half-year survey. Prior to the half-year report for 2009, the questionnaire was distributed to those stakeholders that in the preceding full-year survey altogether represented at least 95 per cent of the market in one of the sub-markets of fixed call services, mobile call services and mobile data traffic, Internet services or television services.[4] In total, this involves 54 stakeholders. At the time the report was published, 53 had responded, corresponding to approximately 98 per cent of those asked. However, the compilation of operator data will also continue after publication of the report 'The Swedish Telecommunications Market', which means that PTS's database[5] for operator statistics is being continuously updated and the response frequency is increasing. The total number of subscriptions and traffic for those who were not asked has been estimated on the basis of their information of the total market in 'The Swedish Telecommunications Market 2008'. A further simplification is that the information on revenues has not been required in the questionnaire for 'The Swedish Telecommunications Market first half-year 2009'.[6]

However, the questionnaire for the full-year version of 'The Swedish Telecommunications Market 2009' will cover all stakeholders in the market for electronic communications and include questions regarding revenues for all sub-markets.

Deviations, estimates and updates of data

Owing to rounding, the information contained in this report is expressed as percentages, and consequently the sum of the parts does not always amount to 100 per cent.

There are of course measurement errors during the compilation process, first, as there are operators in the market that do not respond to the questionnaire, and second, as there is a certain degree of uncertainty contained in the estimate of stakeholders not asked to participate. This applies primarily to the markets

[4] A stakeholder included among the 95 per cent largest operators because of a submarket may respond to all questions in the questionnaire, regardless of whether or not the stakeholder has a smaller market share in the other sub-markets.
[5] PTS's database is available on the PTS statistics portal, statistics.pts.se
[6] Except for the sub-market 'television services', where information about revenues is also compiled for the first half-year 2008.

for broadband subscriptions via fibre and fibre LAN, where there are a large number of stakeholders. However, the operators that have responded represent a significant proportion of the market for electronic communications, and consequently the measurement margin for error should not be particularly great. Measurement error may also arise if those asked have not answered all of the questions in the questionnaire, if the responses were misleading owing to carelessness, inadequate or misunderstood instructions or if it was not possible to derive any exact value from the company's accounts. Such attrition and possible inadequacies in the responses received may often be compensated for by proceeding on the basis of data compiled previously or by making estimates based on related responses in the questionnaire. Historical statistics are continuously updated whenever further information becomes available to PTS, and for this reason statistics for one and the same period may differ in the various reports. It is therefore important that those using the Swedish Telecommunications Market have access to the version published most recently. The most recently updated database is always available on PTS's web-based statistics portal (statistics.pts.se).

Historical information and market shares

Market development is reported by means of statistics, which in some cases go as far back as 1992. As of and including 'The Swedish Telecommunications Market 2006', PTS also publishes market shares for the retail markets for each period that information was compiled, though no historical market shares preceding the full-year 2006. Market shares for a number of different variables are contained in this report, but PTS publishes considerably more details about market shares on its web-based statistics portal. The portal contains market shares for variables for all of the retail markets from and including the full-year 2006. The variables that are considered to be inadequate or misleading in some other way are not published in the statistics portal.

Concerning definitions

Definitions are used in the questionnaire that also form the basis of the reports, and these definitions are revised and clarified continuously so that they reflect current developments in the market. The segmentation of the individual sub-markets may also change from year to year. Since the questionnaire for 2003, regard has also been taken to PTS's need of information for conducting market analyses and making decisions concerning whether any operator has significant market power. The information can to a large extent still be compared with previous reports, despite these changes.

The terms ‘private customer’ and ‘business customer’

In numerous cases, statistics are reported broken down into private customers and business customers. The definitions of ‘private customer’ and ‘business customer’ are based on who pays for the service, not who the user is. The criterion for the paying party to be designated as a business customer (including organisations that are not businesses) is that it has a corporate/organisation identity (ID) number. The others are designated as private customers. However, this approach means that businesses and organisations registered with personal identity (ID) numbers are included in the category ‘private customers’.

Types of Internet connection

As regards the sub-market ‘Internet services’, it is common to confuse expressions such as fixed connection, broadband connection, wireless connection, mobile connection, broadband and others since there is no universally accepted definition of these terms. However, in the Swedish Telecommunications Market, these terms are defined according to the following list:

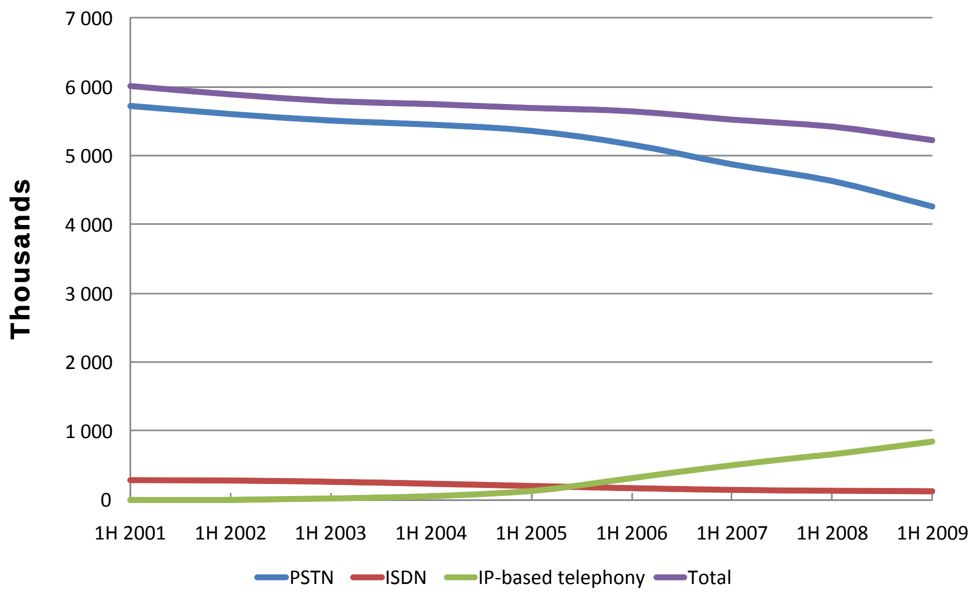
Dial-up connection	PSTN, ISDN, GPRS
Fixed connection	PSTN, ISDN, fixed radio, satellite, xDSL, cable television, fibre, fibre LAN
Mobile connection	GPRS, HSPA, CDMA 2000, GPRS, UMTS, EDGE
Wireless connection	GPRS, fixed radio, satellite, HSPA, CDMA 2000, UMTS, EDGE
Wired connection	PSTN, ISDN, xDSL, cable television, fibre, fibre LAN
Broadband connection	xDSL, cable television, fibre, fibre LAN, fixed radio, satellite, HSPA, CDMA 2000

2 Market development: subscriptions

2.1 Fixed call services

On 30 June 2009 there were 5 244 000 fixed telephone subscriptions in Sweden, which can be compared with 5 397 000 the year before.

Diagram 1 Number of fixed telephony subscriptions



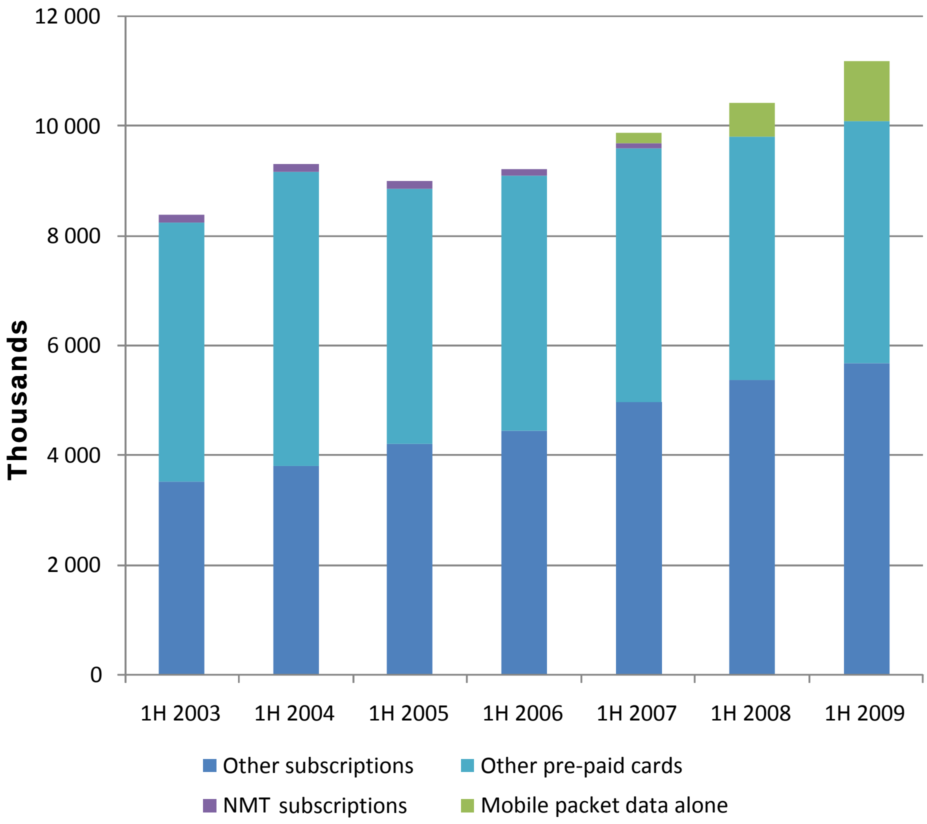
A clear trend is that the number of PSTN and ISDN subscriptions is decreasing at the same time as the number of subscriptions for IP-based telephony is increasing. Between the end of the first half-year 2008 and the end of the first half-year 2009, the number of PSTN-based subscriptions reduced by about 8 per cent, from just over 4.6 million to just over 4.2 million.

During the same period, the number of IP-based subscriptions increased by about 28 per cent, from 656 000 till 865 000. The subscriptions for IP-based telephony via xDSL increased by 51 per cent, from 179 000 on 30 June 2008 to 270 000 on 30 June 2009.

2.2 Mobile call services and mobile data

The market for mobile call services and mobile data has continued to grow. Between 30 June 2008 and 30 June 2009, the number of subscriptions and active pre-paid cards increased from 10.4 million to 11.2 million. This increase is primarily represented by subscriptions for mobile broadband.

Diagram 2 Number of subscriptions and active pre-paid cards for mobile call services and mobile data



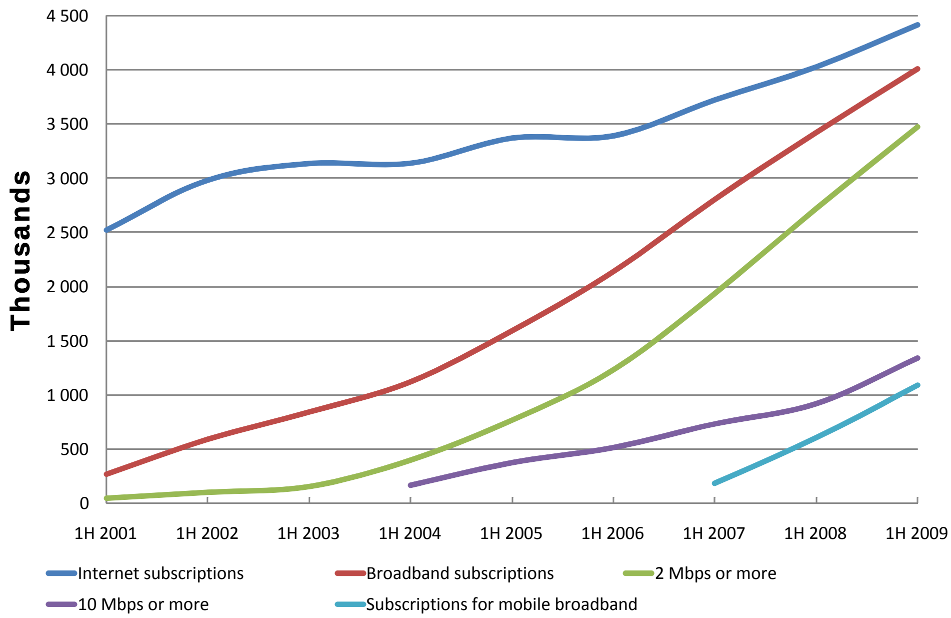
The number of subscriptions and active pre-paid cards for mobile packet data (mobile broadband) alone increased from about 604 000 at the end of the first half-year 2008 to 1 090 000 at the end of the same period in 2009. This change corresponds to an annual growth of 80 per cent. The number of private subscriptions and pre-paid cards increased by 86 per cent and the number of business subscriptions rose by 71 per cent.

On 30 June 2009 there were over 1.6 million telematic subscriptions (machine-to-machine, M2M), which represents an increase of 6 per cent between 31 December 2008 and 30 June 2009. Telematic subscriptions are not included in the subscription figures above.

2.3 Internet services

The market for Internet access has over a number of years undergone major changes in conjunction with the transition from dial-up connections to broadband connections. The breakthrough for mobile broadband has meant that this sub-market is once again facing major changes.

Diagram 3 Number of Internet subscriptions



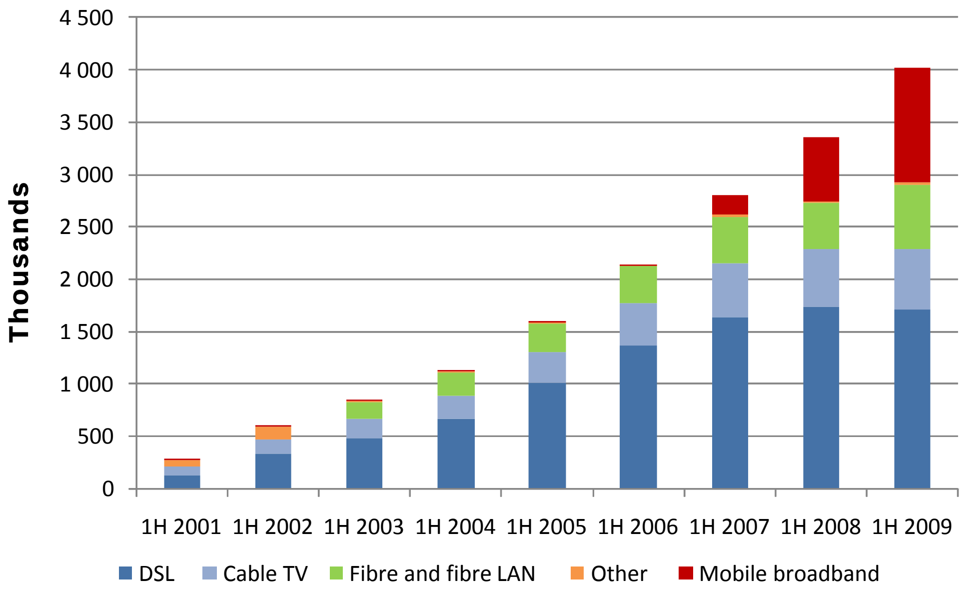
The number of active Internet subscriptions was 4.4 million on 30 June 2009.

The number of active customers having broadband with a transmission rate of 2 Mbps per second or more was almost 3.5 million at the same time, which corresponded to 87 per cent of all customers with broadband. The corresponding share of broadband subscriptions with 2 Mbps per second or more one year earlier was 80 per cent.

The number of active customers having broadband with a transmission rate of 10 Mbps per second or more was just over 1.3 million on 30 June 2009, which corresponded to 33 per cent of all customers with broadband. The corresponding share of broadband subscriptions with 10 Mbps per second or more one year earlier was 27 per cent.

The number of subscriptions for dial-up Internet reduced between 30 June 2008 and 30 June 2009 by 32 per cent, from 607 000 to 411 000 subscriptions.

Diagram 4 Number of broadband subscriptions



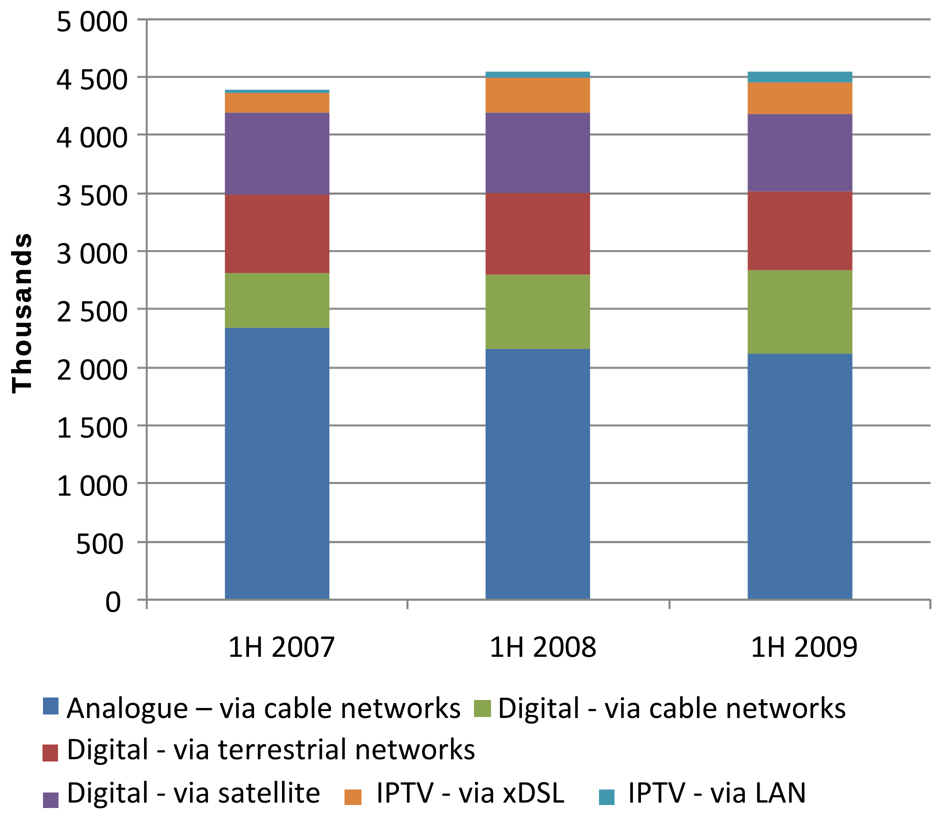
The number of active customers with broadband increased from 3.4 million to 4.0 million between 30 June 2008 and 30 June 2009, which corresponds to growth of approximately 17 per cent.

Mobile broadband represented a large share of this increase, but cable television, fibre and fibre LAN also increased. On 30 June 2009, there were 1.7 million subscriptions for broadband via xDSL. This means that the reduction that occurred during the second half-year 2008 has now also continued during the first half-year 2009.

2.4 Television services

On 30 June 2009, the total number of television subscriptions in the Swedish market was 4.5 million, of which just over 2.4 million are digital television subscriptions. There are, viewed overall, approximately the same number of television subscriptions as one year ago, but digital subscriptions have increased and analogue subscriptions decreased. Digital television via cable networks represents a large part of the increase, from 638 000 subscriptions on 30 June 2008 to 718 000 subscriptions at the same point in time in 2009, an increase of just over 15 per cent in one year. IPTV via LAN networks also increased during the same period, from 63 000 to 96 000 on 30 June 2009, which corresponds to an increase of over 50 per cent. Subscriptions via the other distribution platforms reduced during the year.

Diagram 5 Distribution of television subscriptions between various distribution platforms

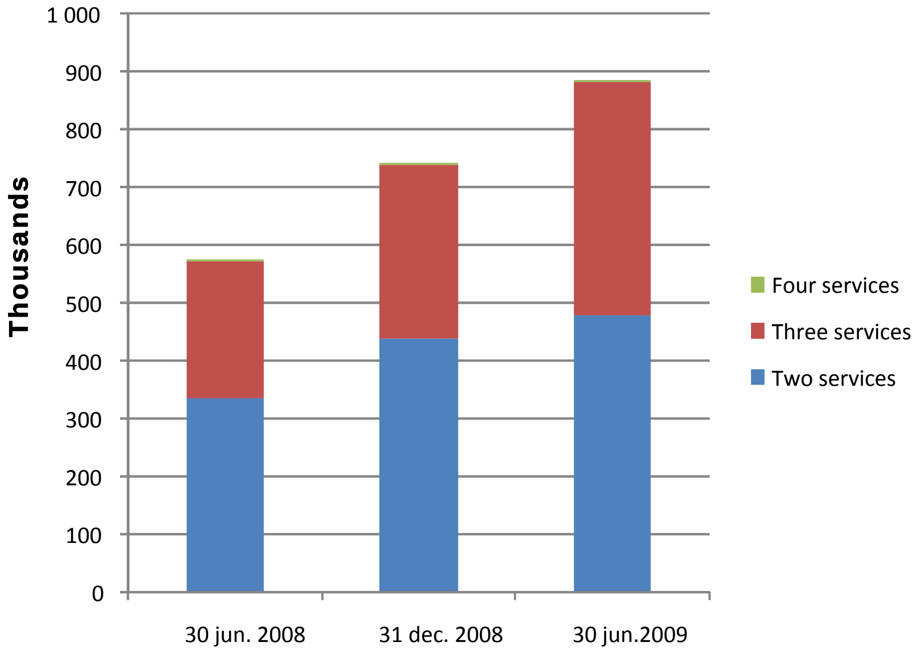


Households that receive only free television via the digital terrestrial network are not included in the statistics.

2.5 Bundled subscriptions

'Bundled services' refers to combination offers that contain two or more services, which are offered and marketed as an offer or with a price list for the bundled services. The most common bundled services offered on the market include various combinations of telephony (fixed and/or mobile), television and Internet access.

Diagram 6 Number of bundled subscriptions



Bundled subscriptions are becoming increasingly common. Overall, there were 887 000 bundled subscriptions on 30 June 2009. Of all mobile telephony, fixed telephony, digital television and broadband subscriptions, 8 per cent were bundled with other subscriptions.

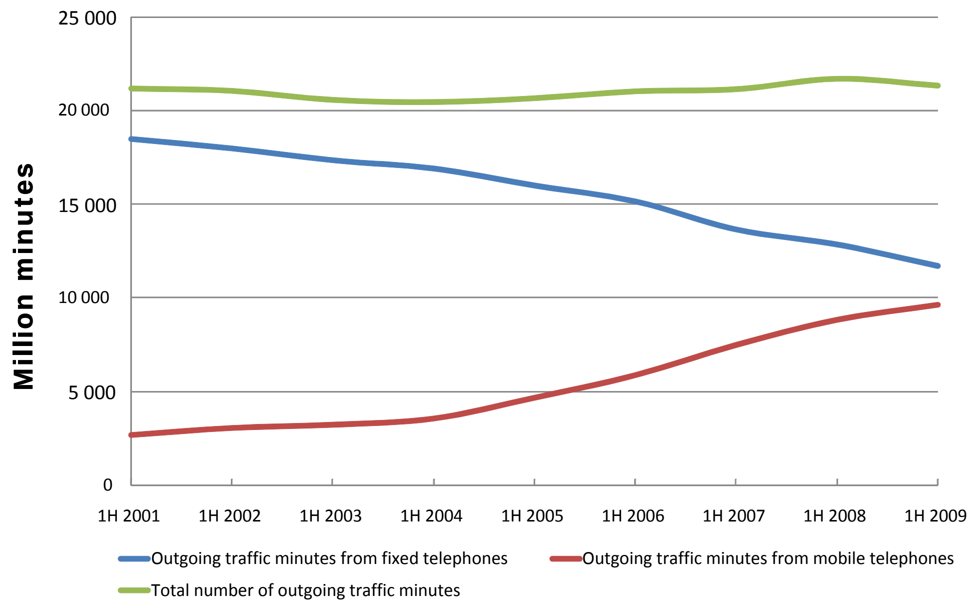
The form of bundling that increased the most comprises broadband, fixed telephony and television, where the number of subscriptions amounted to 357 000 on 30 June 2009. This form of combination offer is thus almost as common as the offers including broadband and fixed telephony (that is to say, excluding television), which amounted to 370 000 subscriptions at the same point in time.

3 Use: traffic

3.1 Call traffic

The number of outgoing call minutes in mobile networks is continuing to approach the corresponding number of minutes in fixed networks. The proportion of outgoing call minutes in mobile and fixed networks amounted to 84 per cent in the first half-year 2009, compared with 66 per cent in the first half-year 2008.

Diagram 7 Outgoing traffic minutes from fixed and mobile telephones



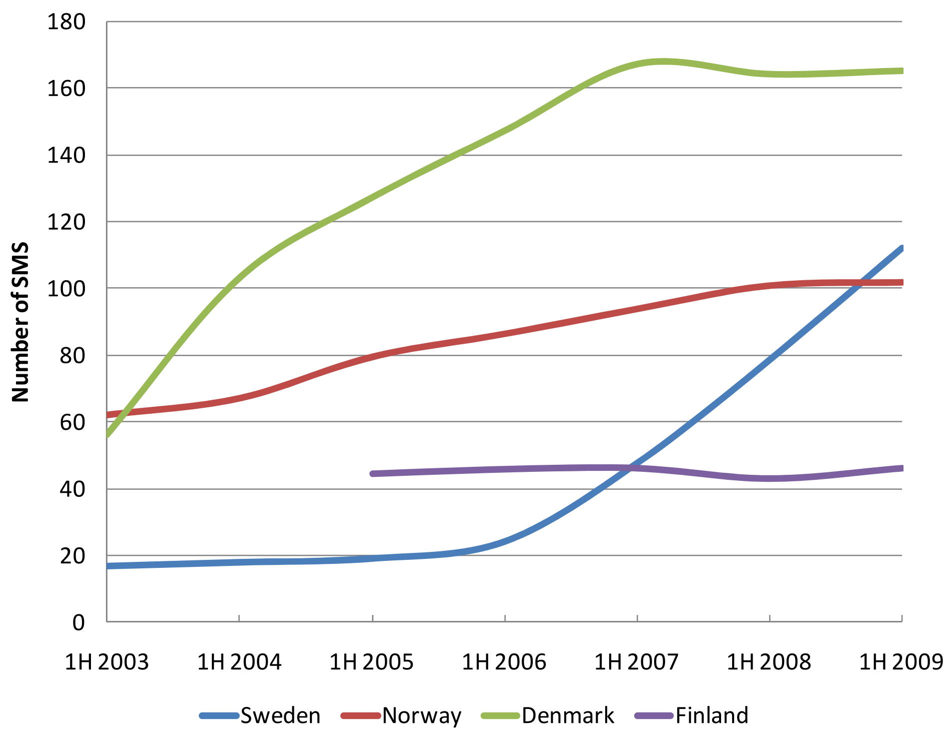
The number of outgoing traffic minutes for fixed call services reduced from almost 13.4 billion during first half-year 2008 to almost 11.5 billion during the corresponding period of time in 2009. This means an annual reduction in traffic of the number of outgoing minutes per subscriber and month of 45 minutes, or corresponding to 11 per cent; this is from approximately 409 minutes per month during the first half-year 2008 to about 361 minutes per month during the second half-year 2009.

The number of outgoing call minutes from mobile telephones increased from 8.8 billion to 9.6 billion minutes between the first half-year 2008 and the corresponding period in 2009. This increase means that the number of outgoing call minutes from a mobile telephone for an average mobile customer rose by approximately 6 minutes per month during the period, from 150 minutes per month to 159 minutes per month.

3.2 Messaging services[7]

During the first half-year 2009, around 6.8 billion text messages (SMS) were sent from mobile telephones, which correspond to an annual increase of 48 per cent.

Diagram 8 Average number of SMS messages sent per customer and month



An average customer sent 112 text messages per month, which is an increase of 33 text messages compared with the corresponding period in 2008. In PTS's Survey of Individuals 2009,[8] it is shown that there has been no increase in the

[7] Tele2 have revised their total number of SMS sent for the time period 2006 to 2008. The revision implies that the average number of sent text messages, SMS differ in this report compared to the ones which were given in the report Swedish Telecom Market 2008.
[8] PTS's Survey of Individuals 2009, PTS-ER-2009:28

proportion of individuals who send text messages, but that those who actually use SMS are sending an increasing number of text messages.

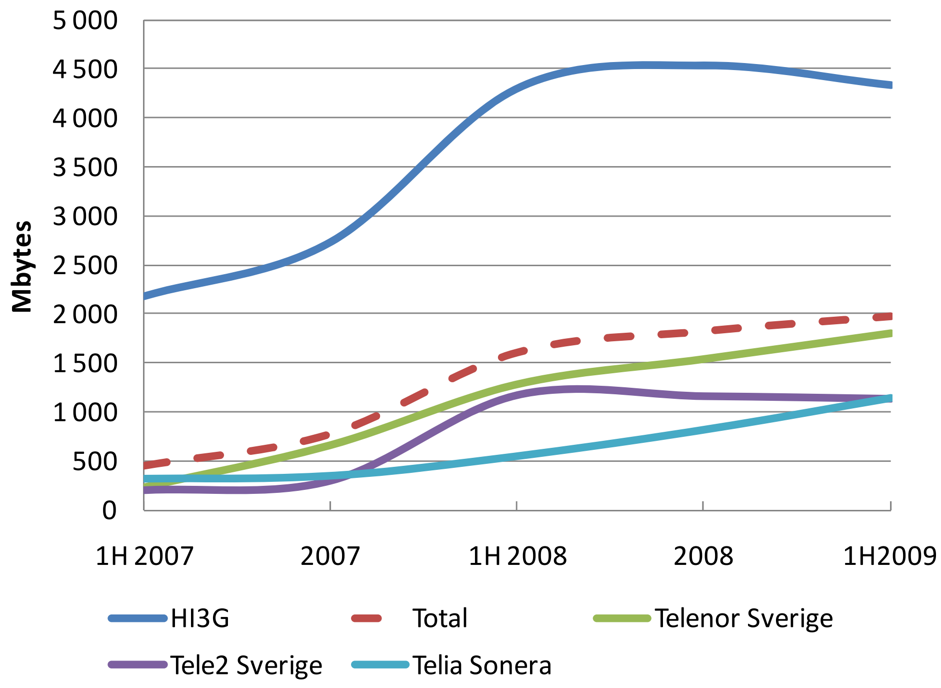
Besides the 6.8 billion text messages that were sent from terminals, there are additional text messages generated by telematic subscriptions. On average, 8 text messages were sent per such subscription and month during the first half-year 2009.

During the first half-year 2009, 67 million MMS messages were sent. This is 3 million more than during the corresponding period of the preceding year, but 6 million less than during the second half-year 2008. On average, just more than 1 MMS message per customer and month was sent during the first half-year 2009.

3.3 Mobile data

Traffic for mobile data services increased from 4 729 Tbytes during the first half-year 2008 to 11 664 Tbytes during the first half-year 2009. This change corresponds to an annual growth of 147 per cent.

Diagram 9 Average data traffic in mobile networks per subscription to mobile broadband and month



The total quantity of mobile packet data[9] generated per subscription of mobile broadband and per month was almost 2 Gbytes during the first half-year 2009. This is 23 per cent more traffic per subscription of mobile broadband and per month than during the first half-year 2008, but only 8 per cent more than during the second half-year 2008. One explanation for the increase having tailed off may be that the IPRED Act entered into force in the spring of 2009, following which there was a sharp drop for a period in the downloading of data.

Diagram 9 above indicates that there is a great difference between the operators as regards the average quantity of data per subscription of mobile broadband and per month and also that the increase is tailing off, and even reducing slightly, for individual operators.

[9] Subscriptions that handle both mobile packet data and calls also generate mobile packet data. However, PTS has received indications that this proportion is very small in comparison to what is generated by subscriptions for mobile packet data alone.

4 Market shares

Diagram 10 Market shares: all subscriptions and active pre-paid cards for mobile call services and mobile data

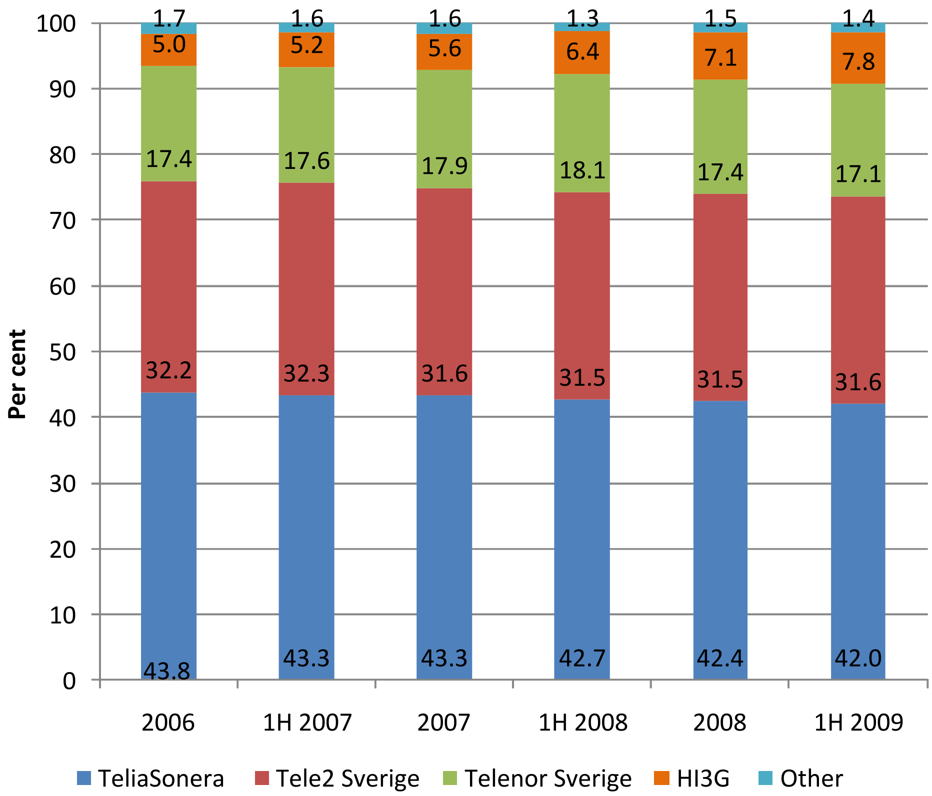


Diagram 10 shows the development of the market shares[10] for the large network-owning operators TeliaSonera, Tele2, HI3G and Telenor. Tele2 remained at an unchanged level in the spring of 2009 compared with the spring of 2008, while TeliaSonera and Telenor's market shares have reduced. HI3G has continued to increase steadily – primarily owing to a rather large proportion of subscriptions for mobile broadband.

[10] In this Diagram, the market shares for service providers that are at least 50 per cent owned by a network operator have been added to the market share of the network operator.

Diagram 11 Market shares: subscriptions for fixed call services

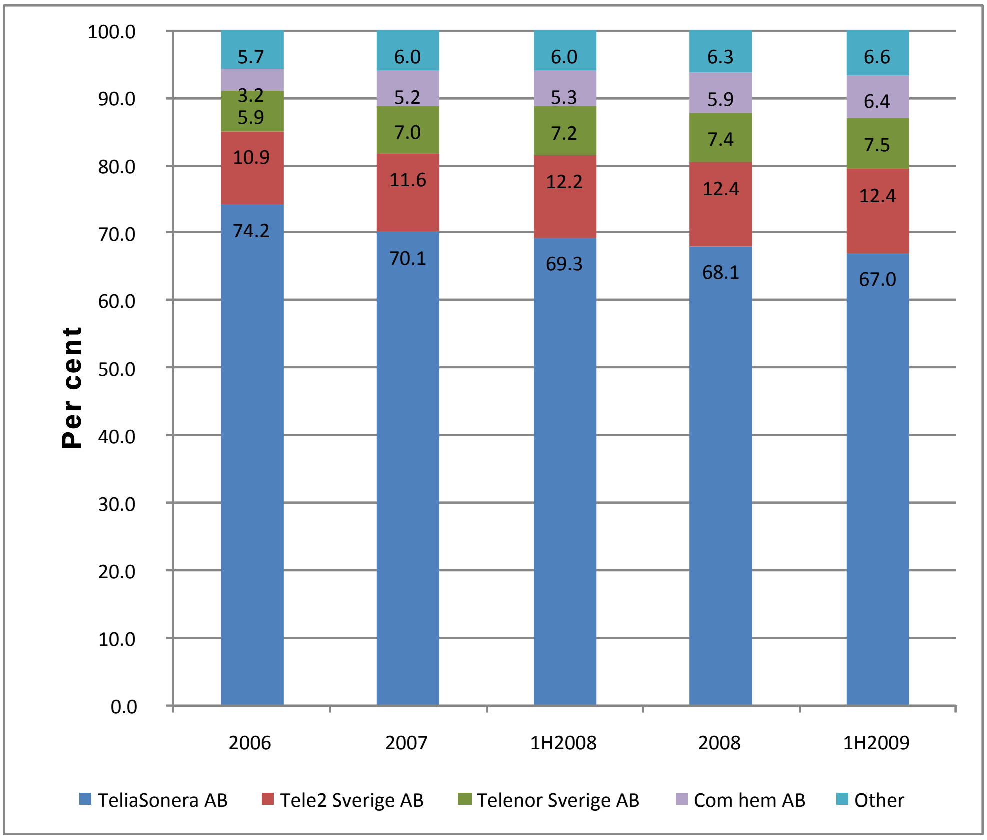


Diagram 11 shows the development of the market shares[11] for the operators TeliaSonera, Tele2, the Telenor Group and Com hem. Tele2 and Telenor remained at an unchanged level in the spring of 2009 compared with the spring of 2008 while TeliaSonera's market share has reduced and Com hem's has grown.

[11] In this Diagram, the market shares for service providers that are at least 50 per cent owned by a network operator have been added to the market share of the network operator.

Diagram 12 Market shares: broadband subscriptions

Diagram 12 shows the development of the market shares[12] for the operators TeliaSonera, Tele2, the Telenor Group, HI3G and Com hem. TeliaSonera remained at an unchanged level of just over 38 per cent during most periods. The Tele2 Group and HI3G have increased their market shares in the spring of 2009 compared with one year before, an increase that to a large extent is based on the number of growing number of mobile broadband subscriptions. The Telenor Group, Com hem and other stakeholders have lost market shares in recent years

[12] In this Diagram, the market shares for service providers that are at least 50 per cent owned by a network operator have been added to the market share of the network operator.

Appendix 1: Participants

- ACN Communications Sweden AB
- AllTele Allmänna Svenska Telefonaktiebolaget
- AT&T Global Network Services Sweden AB
- B2 Bredband AB
- Bahnhof AB
- Blixtvik AB
- Boxer TV-Access AB
- Bredband i Gislaved Gnosjö AB
- Bredband2 AB
- Brinet AB
- BT Nordics Limited UK Filial
- Canal Digital Sverige AB
- Carrot Communications AB
- Comhem AB
- DGC Access AB
- Fast TV
- Fastbit AB
- Glocalnet Scandinavia AB
- Gävle Energi AB
- Gävlegårdarna
- Götalandsnätet AB
- Göteborg Energi GothNet AB
- HI3G Access AB
- IP-Only Telecommunication AB
- Karlskoga Bredband AB
- Kommunicera i Umeå AB
- Kungälvs Energi AB
- Lidén Data Internetwork AB
- Lulebo AB
- Net at Once Sweden AB
- Nordisk Mobiltelefon Sweden AB
- Optimal Telecom Sverige AB
- Ownit Broadband AB
- Phonera AB
- QuickNet AB
- Rätt Internetkapacitet i Sverige AB
- Sandviken Energi Elnät AB, SandNet
- SIHI Scandinavia AB
- Spring Mobil AB
- Sundsvall Elnät AB
- Svea Billing Systems AB
- Svensk programagentur (SPA)
- TDC Sverige AB
- Tele2 Sverige AB
- Telecom3 Networks AB
- Telenor Sverige AB
- Teleservice Bredband Skåne AB
- TeliaSonera AB
- Timepiece-Servicos De Consultoria Lda
- Tyfon Svenska AB
- Ventelo Sverige AB
- Verizon Sweden AB
- Viasat AB
- Wireless Maingate Nordic AB
- Värnamo Energi AB
- Vökby Bredband AB

Appendix 2: Report Tables

Electronic communications	Table 1	Key data
Electronic communications	Table 2	Nyckeldata (Swedish)
Electronic communications	Table 3	Traffic from end-user
Fixed call services	Table 4	Subscriptions- number of
Fixed call services	Table 5	Traffic minutes
Fixed call services	Table 6	Calls- number of
Fixed call services	Table 7	Calls- average
Mobile call services and mobile data	Table 8	Subscriptions - number of
Mobile call services and mobile data	Table 9	Subscriptions - distribution
Mobile call services and mobile data	Table 10	Subscriptions - growth
Mobile call services and mobile data	Table 11	Traffic minutes
Mobile call services and mobile data	Table 12	Calls- number of
Mobile call services and mobile data	Table 13	Mobile data services
Mobile call services and mobile data	Table 14	SMS
Mobile call services and mobile data	Table 15	MMS
Mobile call services and mobile data	Table 16	Telematic
Internet services	Table 17	Subscriptions - number of
Internet services	Table 18	Subscriptions - distribution
Internet services	Table 19	Subscriptions - broadband
Internet services	Table 20	Subscriptions - growth
TV services	Table 21	Subscriptions
Bundles services	Table 22	Subscriptions

The tables are available in separate files in Excel and pdf-format.

Appendix 3: Questionnaire

The questionnaire is available in a separate pdf-file