



# Operator business services: Denmark forecast 2020– 2025



Catherine Hammond

## About this report

This report analyses the demand for telecoms and ICT services in Denmark by micro enterprises, small and medium-sized enterprises and large enterprises, expressed in terms of revenue, the number of connections or users and the average revenue per user (ARPU).<sup>1</sup>

The report highlights that operator business revenue in Denmark is expected to grow slightly between 2020 and 2025. The report identifies the key drivers behind this trend.

It quantifies the market for fixed and mobile voice and data services, IoT connectivity services and ICT services including security, co-location and hosting, SaaS and IaaS/PaaS.

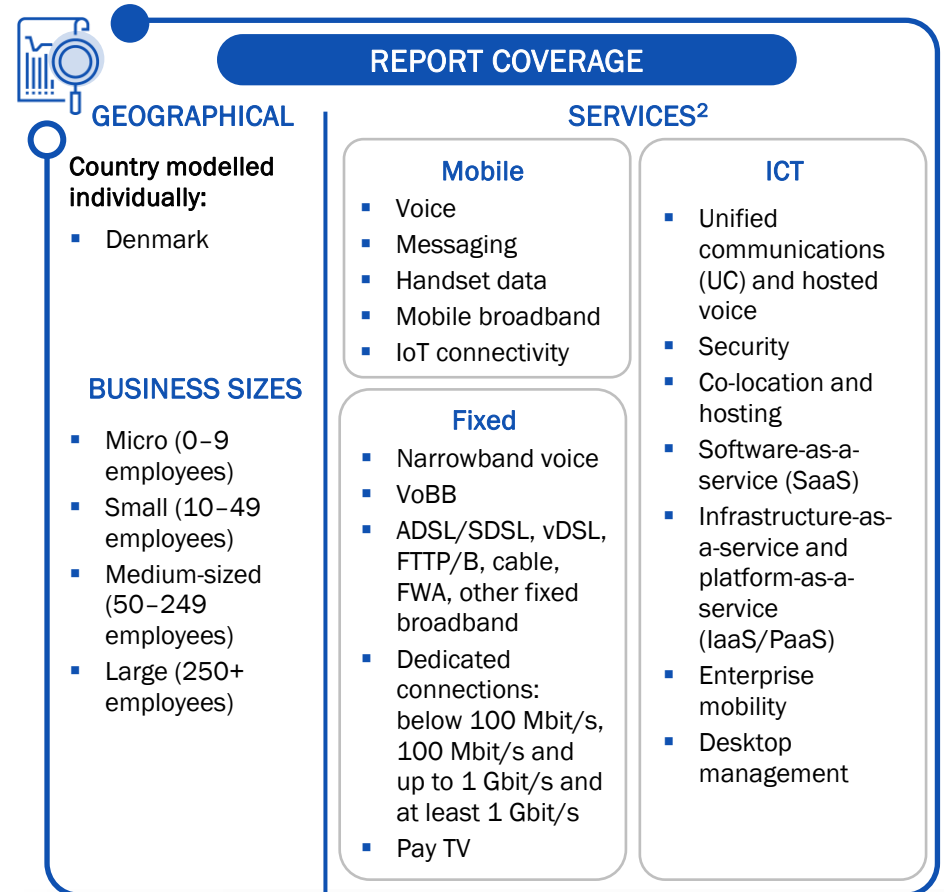
The report is based on several sources, including the Danish Energy Agency, Statistics Denmark, operator reporting, EuroStat's and other third-party reports, as well as Analysys Mason's surveys on businesses' telecoms and ICT usage.

### WHO SHOULD READ THIS REPORT

- Operators that want to identify key areas for revenue growth, both in terms of business segments and individual services.
- Vendors that are considering targeting the business market.
- Third-party service providers that are seeking to collaborate with operators.

<sup>1</sup> For the complete data set, see Analysys Mason's [DataHub](#).

<sup>2</sup> See service taxonomy in the 'Forecast methodology and assumptions' section of this report.



This report presents commentary on the data available at the time of writing. However, we constantly refine and refresh our data, so please visit the Analysys Mason DataHub to view the latest data associated with this report.

# Operator business revenue is expected to grow between 2020 and 2025, driven by the increased adoption of ICT services and the economic recovery from COVID-19

Operator business revenue from retail telecoms and ICT services in Denmark will grow from DKK9.9 billion in 2020 to DKK10.2 billion in 2025 at a CAGR of 0.6%.

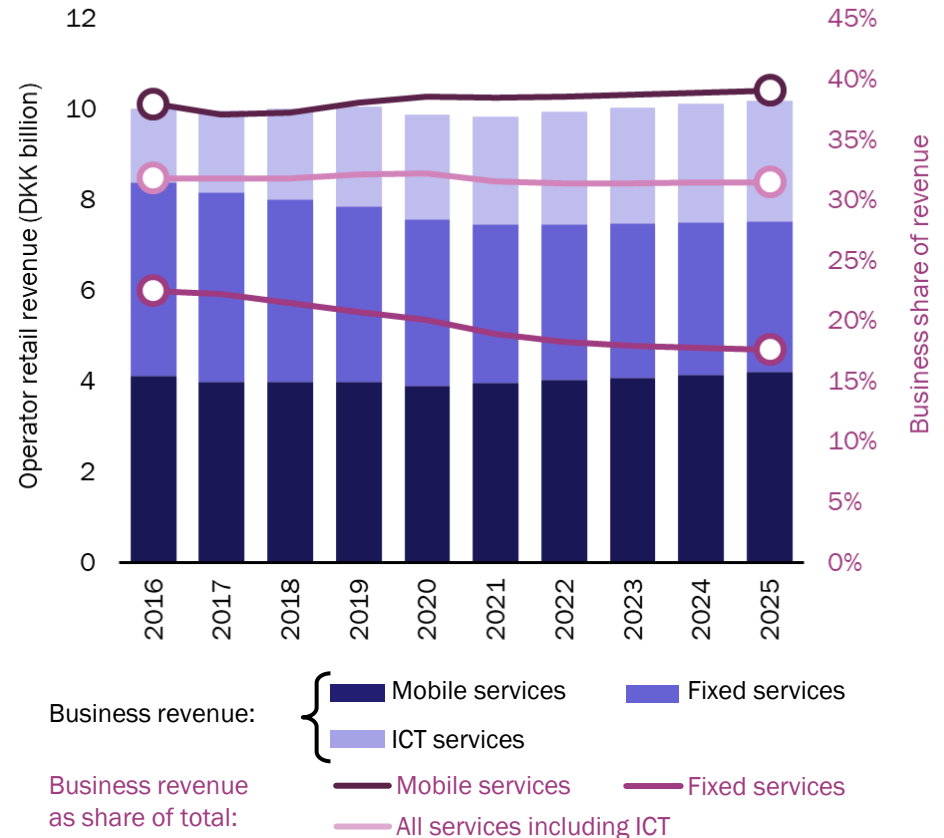
Mobile service revenue will increase slightly as business travel resumes in the wake of the COVID-19 pandemic and 5G networks are deployed. IoT connectivity services revenue will increase rapidly and is expected to account for 10% of business mobile revenue by 2025 (see Figure 8 on slide 10).

Fixed service revenue will fall in the forecast period, mainly due to further declines in voice revenue as many businesses adopt cloud-based voice and unified communications solutions. Broadband revenue will also continue to come under pressure from lower-priced, consumer-grade services as fibre network roll-out is extended.

ICT services are already widely adopted by business in Denmark, but will continue to deliver revenue growth for operators, particularly for security and public cloud services.

Business revenue currently accounts for nearly a third of operator retail revenue in Denmark and we expect this to remain stable as growth in ICT services offsets a reduction in fixed market share compared to the consumer market (in which broadband revenue is expected to increase).

Figure 4: Telecoms operator retail revenue from businesses by service type and share of total market, Denmark, 2016–2025<sup>1,2</sup>



Source: Analysys Mason

<sup>1</sup> Revenue from businesses purchasing consumer products is excluded from our business revenue estimates, in line with operator reporting practice. <sup>2</sup> See the 'Presentation of results' slide in the 'Forecast methodology and assumptions' section of this report for full definitions of the aggregate categories presented in the figures.



Executive summary

Forecast results

Operator profiles

Forecast methodology and assumptions

**About the author and Analysys Mason**

## About the author







**Catherine Hammond** (Principal Analyst, Research) is a member of Analysys Mason's Operator Business Services and IoT research practice, specialising in market forecasting. She previously worked for nine years as a Senior Manager within Analysys Mason's Consulting division, undertaking work for a wide range of operators, regulators and government agencies in Europe and Asia. Her work included the development and review of quantitative models, assessment of business plans, development of market forecasts, collation and analysis of benchmarks, development of white papers and leading client workshops and major presentations. She holds an MA in mathematics from the University of Cambridge.



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# Our areas of expertise



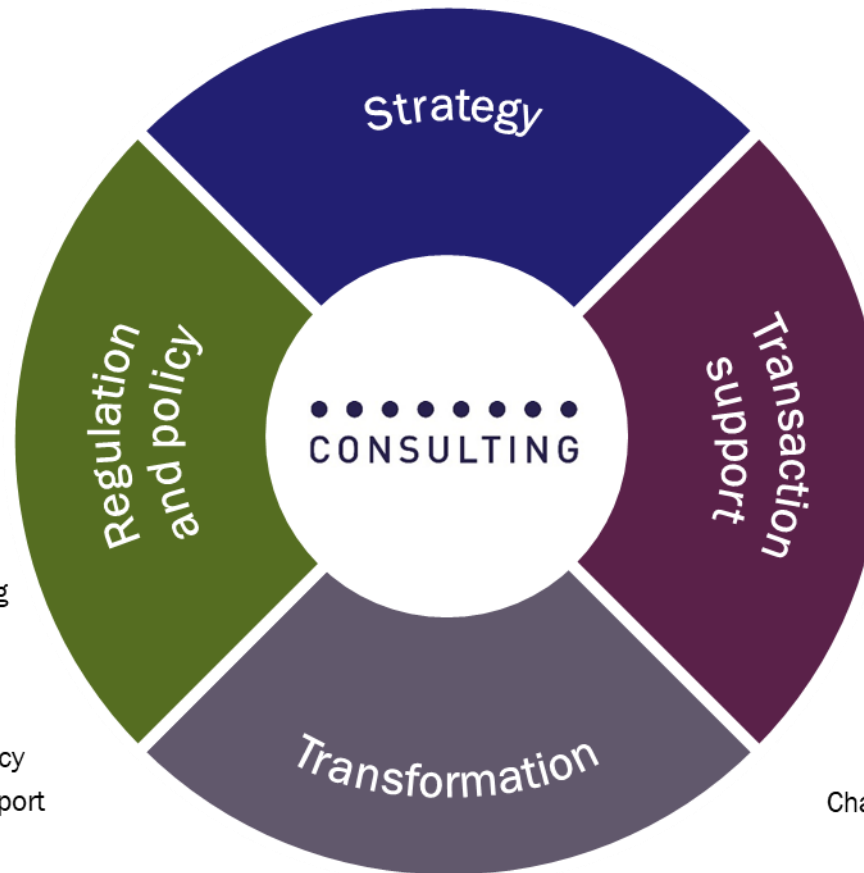
## Strategy

- Corporate growth strategy
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- Infrastructure strategy



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