

Benchmarking Danish fibre broadband pricing vs. seven other European markets

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Background & methodology

- This analysis is commissioned by Dansk Energi
- It compares Danish fibre broadband consumer pricing with that of seven comparable European countries:
 - Sweden
 - Norway
 - Germany
 - Netherlands
 - UK
 - Belgium
 - France
- Purchase power adjustment done
- Two largest (fibre) broadband providers covered per country
- All fee components gathered – monthly subscription fees and one-time fees
 - Uses the total 2 year fees as the ultimate comparison
- Threshold: At least 100 Mbit/s in download speed
- Two separate cases:
 - **New build**: A detached house owner connects to fibre for the first time
 - **Existing connection**: A new consumer subscribes to broadband in a house that already has a fibre connection



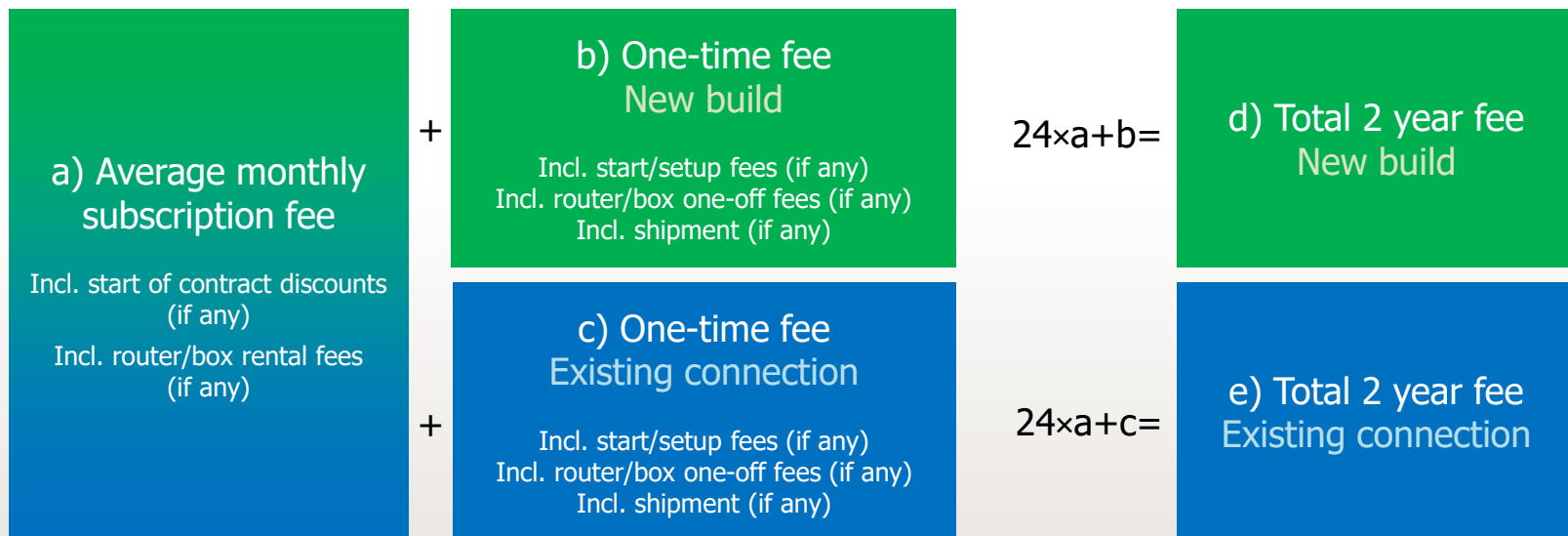
Peer group countries: Key characteristics

December 2020	Fixed broadband household adoption	Share of fixed broadband with ≥ 30 Mbit/s download throughput	Share of households with fibre availability	Share of fixed broadband subscriptions on fibre	Share of broadband subscriptions being mobile data-only
Denmark	83%	83%	72%	39%	31%
Sweden	84%	89%	83%	75%	26%
Norway	89%	n/a	74%	60%	12%
Germany	87%	71%	14%	5%	3%
Netherlands	95%	93%	42%	21%	10%
UK	99%	73%	21%	4%	15%
Belgium	78%	96%	n/a	2%	3%
France	106%	48%	43%	34%	10%

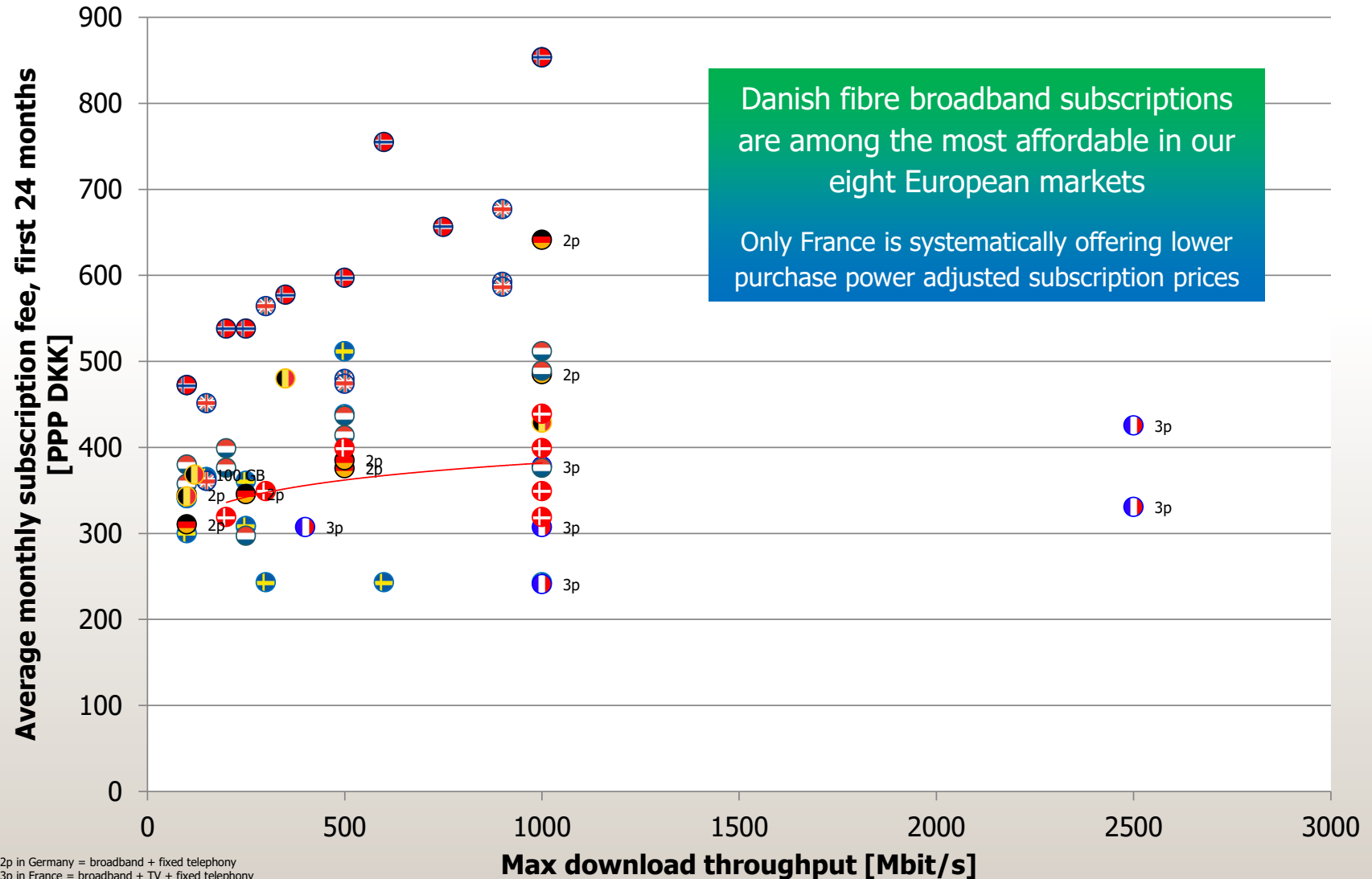
The three countries behind Denmark in fibre availability and adoption are Germany, the UK and Belgium. The incumbent operators in these countries did for long resist fibre rollout to instead offer faster xDSL variants. These countries are also well served by modernised HFC (cable TV) networks.

The countries closest to Denmark – figures-wise – are France, the Netherlands, Norway and Sweden. With regards to fibre adoption, Sweden and Norway are well ahead of the other countries.

Overview of pricing analysis

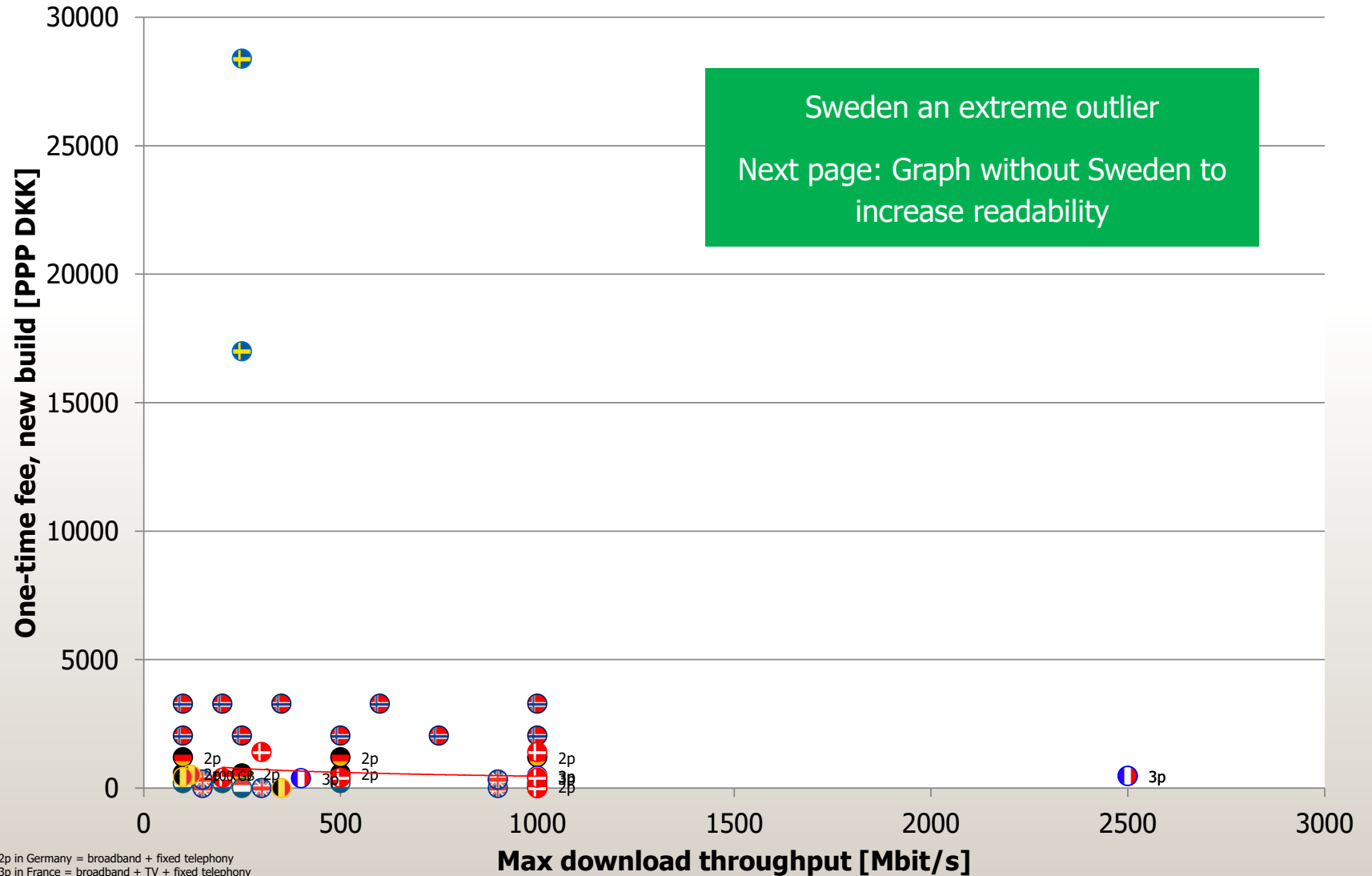


Average monthly subscription fee



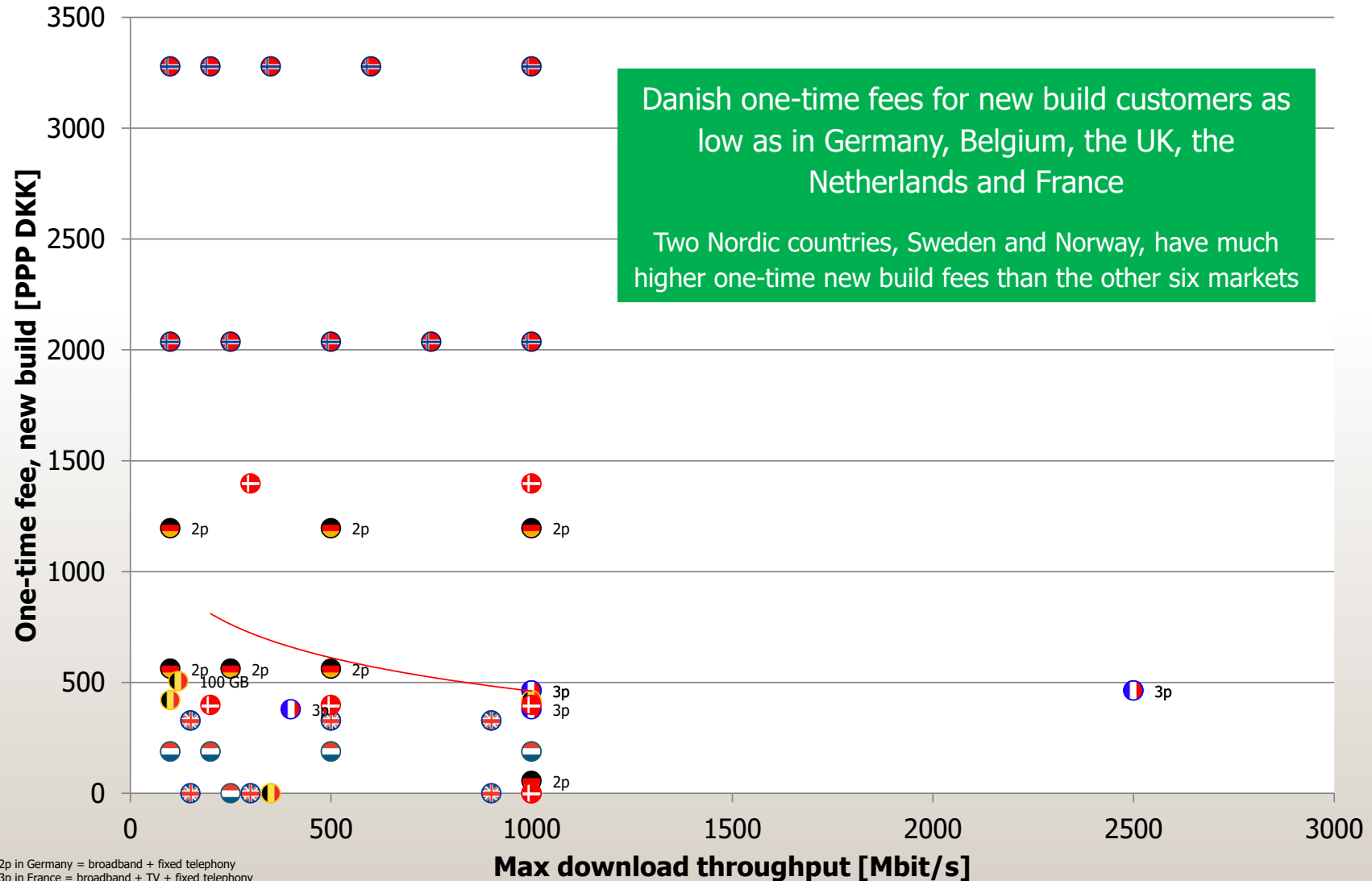
2p in Germany = broadband + fixed telephony
 3p in France = broadband + TV + fixed telephony
 All plans unlimited volume except one from Proximus Belgium with 100 GB per month

One-time fee – new build



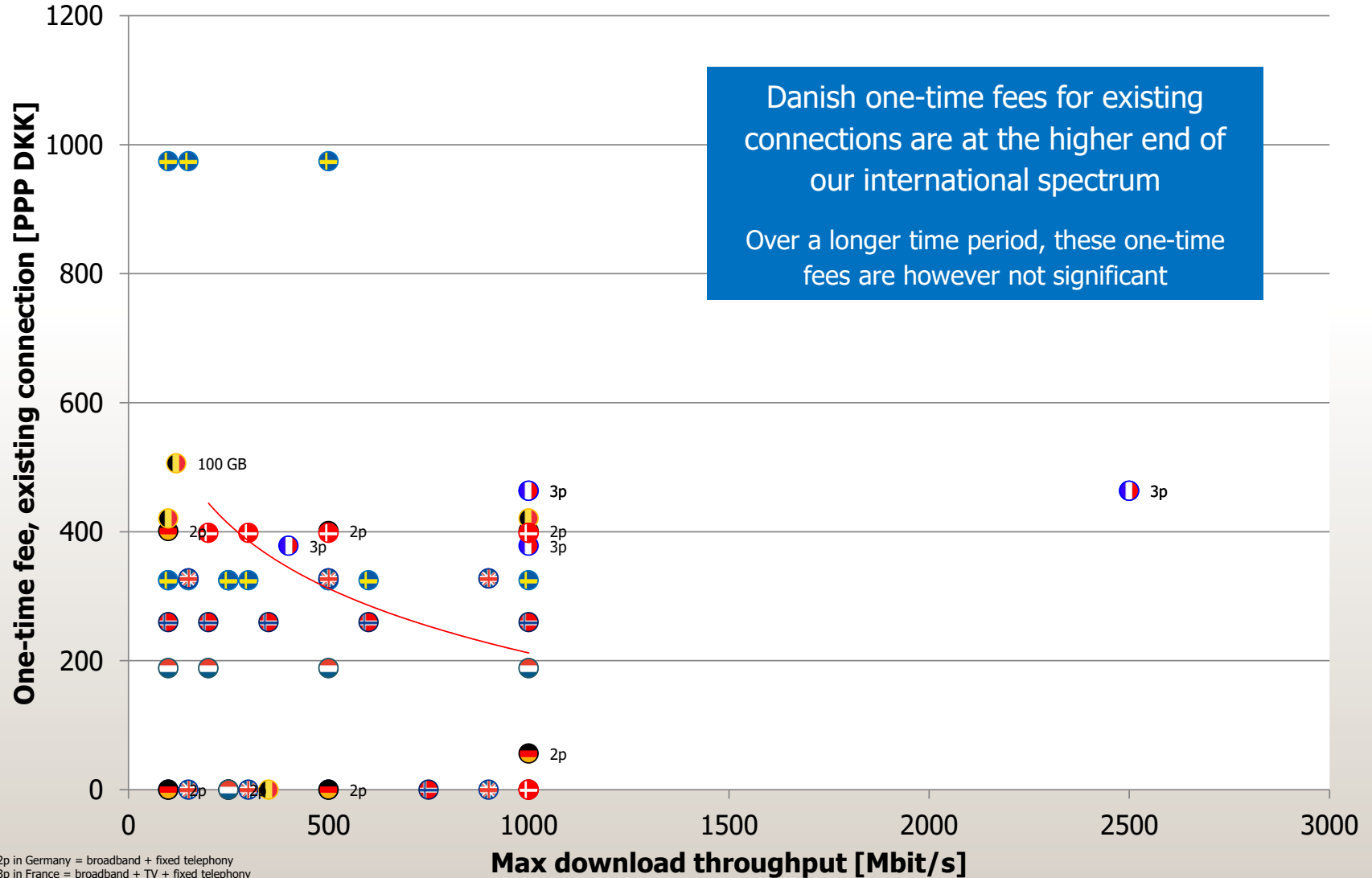
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One-time fee – new build (without Sweden)



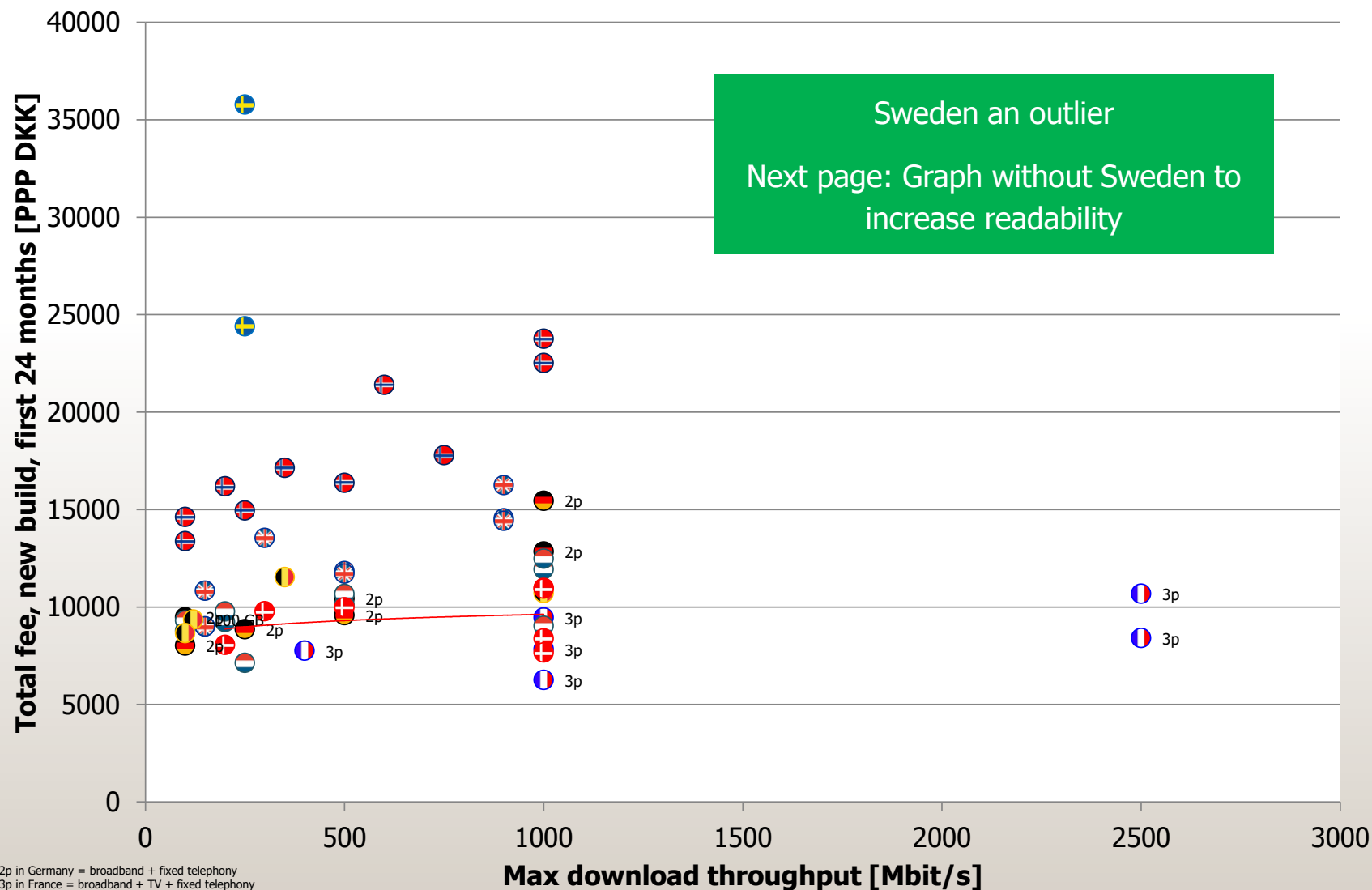
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One-time fee – existing connection



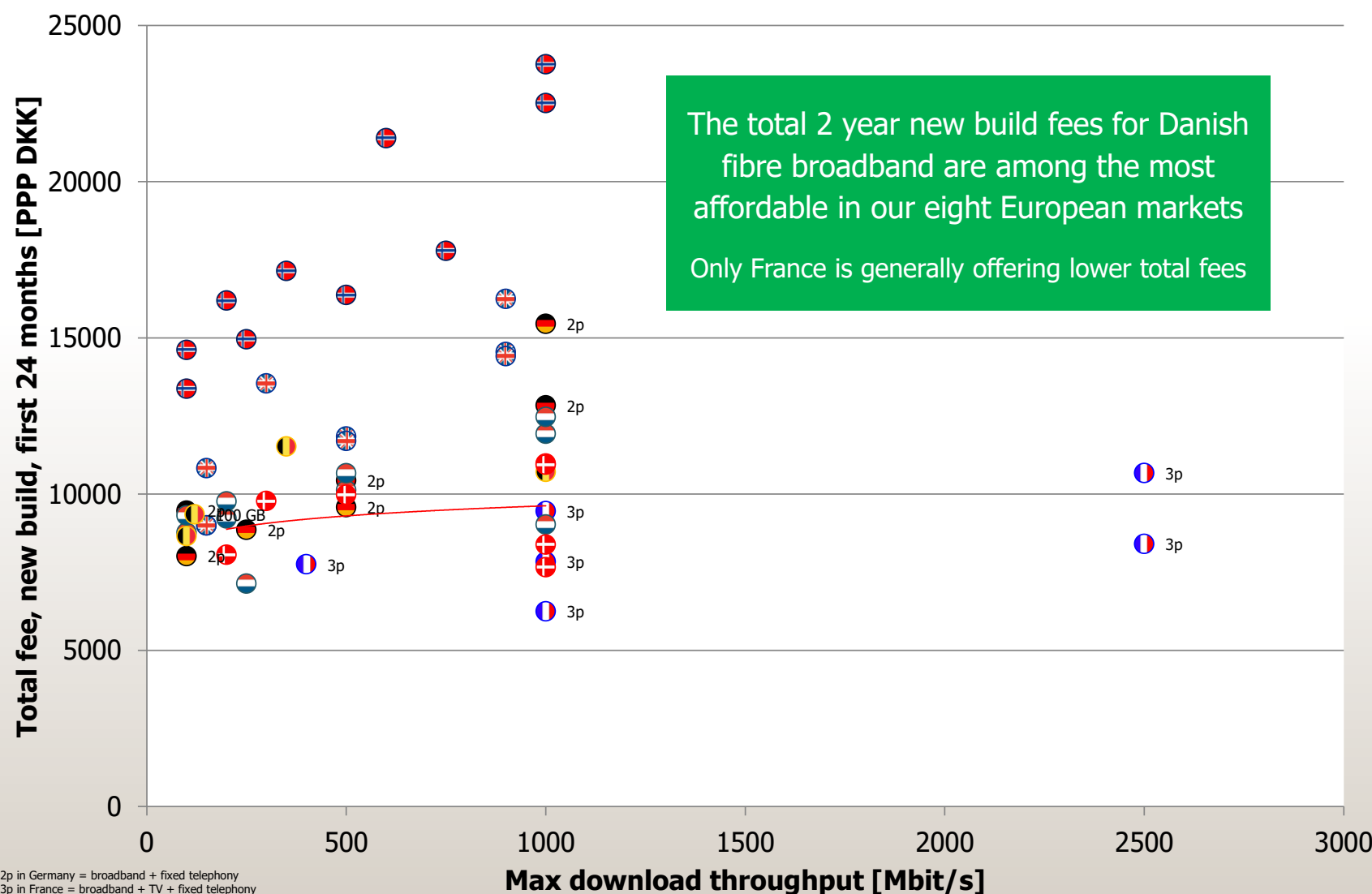
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Total 2 year fee – new build



2p in Germany = broadband + fixed telephony
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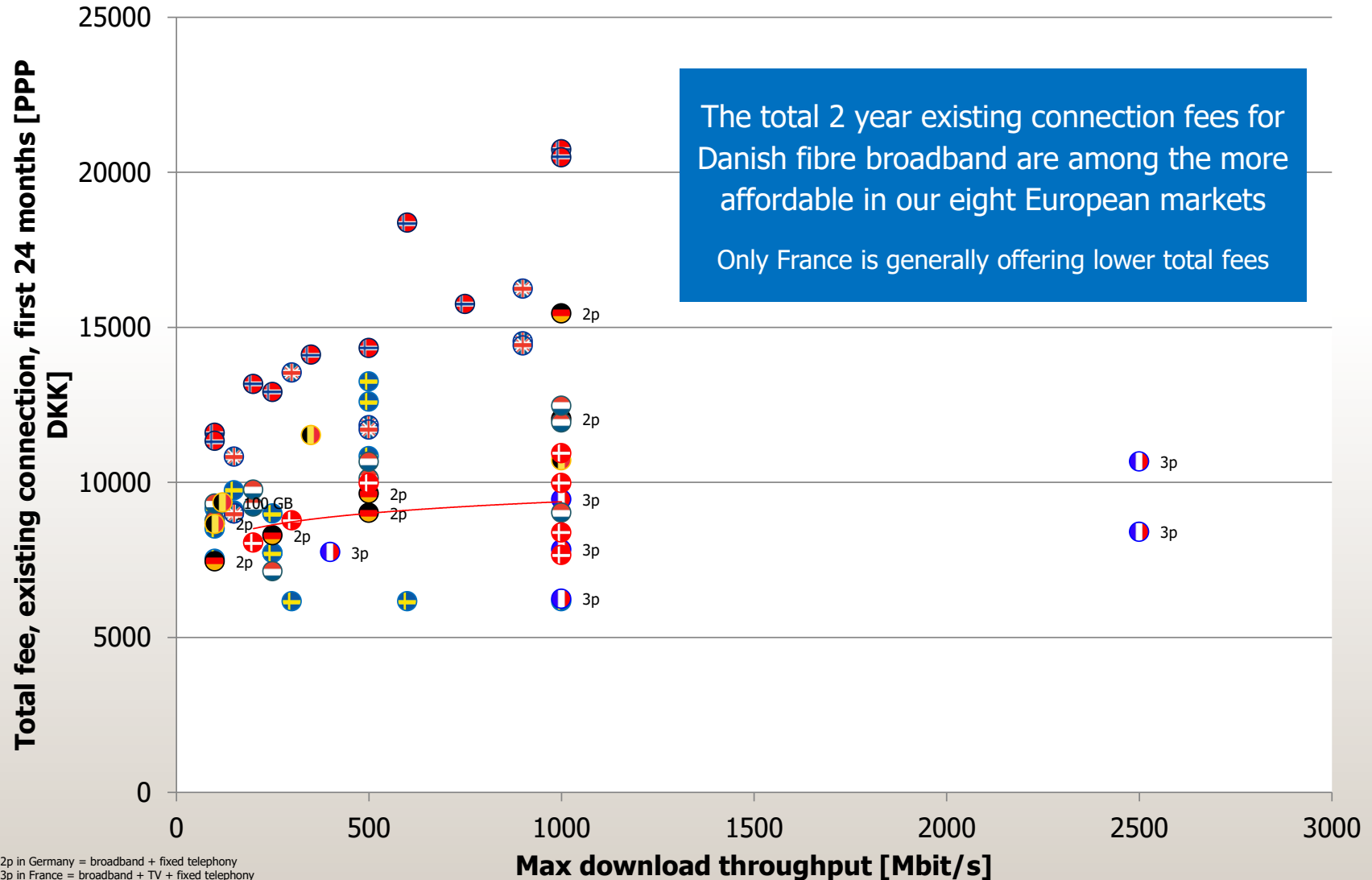
Total 2 year fee – new build (without Sweden)



The total 2 year new build fees for Danish fibre broadband are among the most affordable in our eight European markets. Only France is generally offering lower total fees.

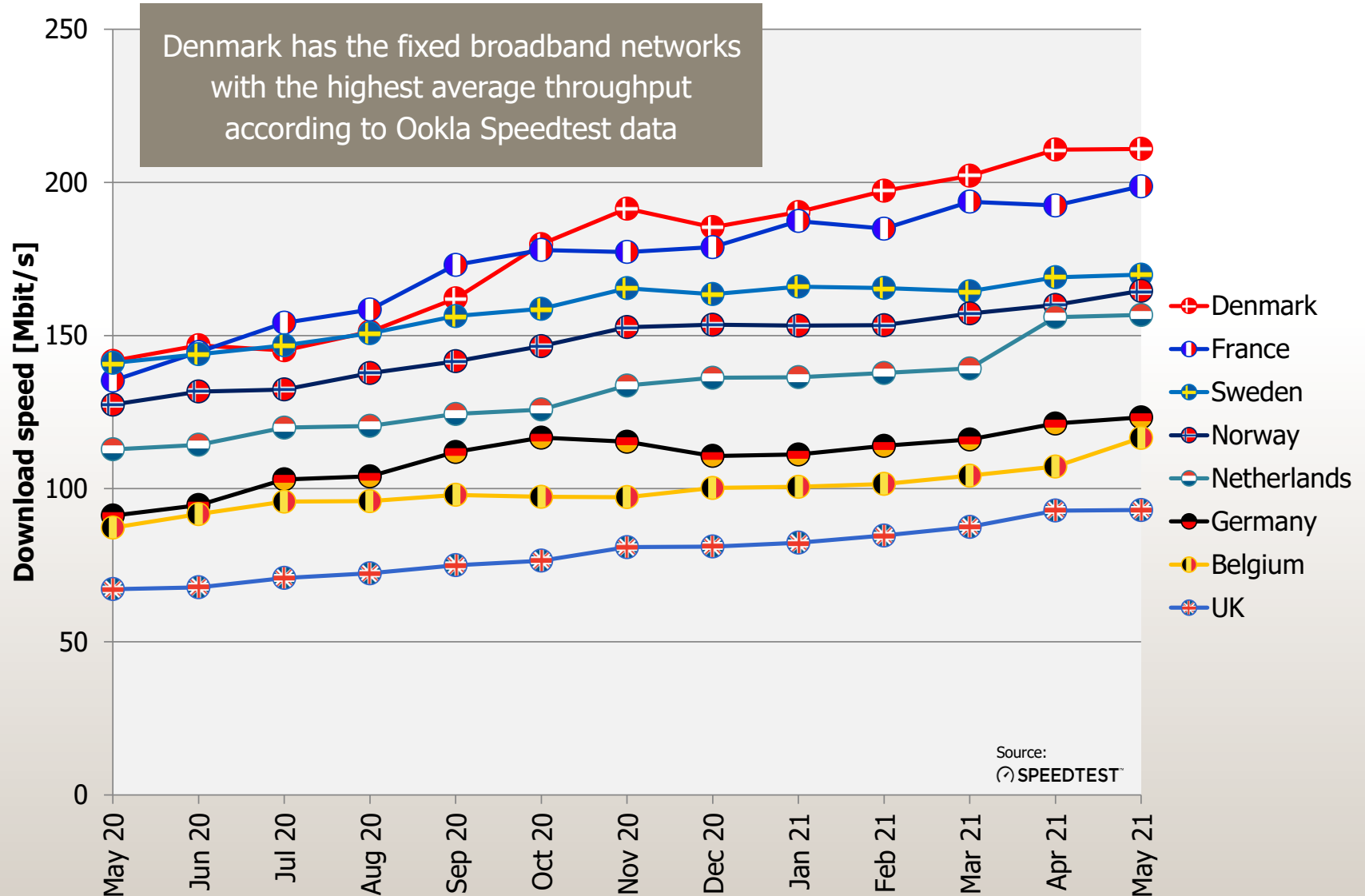
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Total 2 year fee – existing connection



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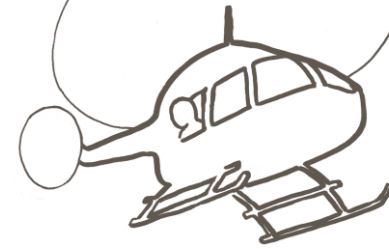
Fixed broadband: Actual throughput



Conclusions

Denmark has:

- Among the *most* affordable total 2 year fees for a **new build** fibre customer
- Among the *more* affordable total 2 year fees for an **existing connection** fibre customer
- Denmark's price position comes even though Danish fibre broadband contracts have minimum contract duration of 6 months – more than 3 months shorter than the average in our markets
- Denmark is also, according to Ookla Speedtest data, providing the fastest average download in its fixed broadband networks



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