



Statistics in focus

INDUSTRY, TRADE AND SERVICES

THEME 4 – 12/2003

SECTORIAL PROFILES

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Telecommunications in Europe

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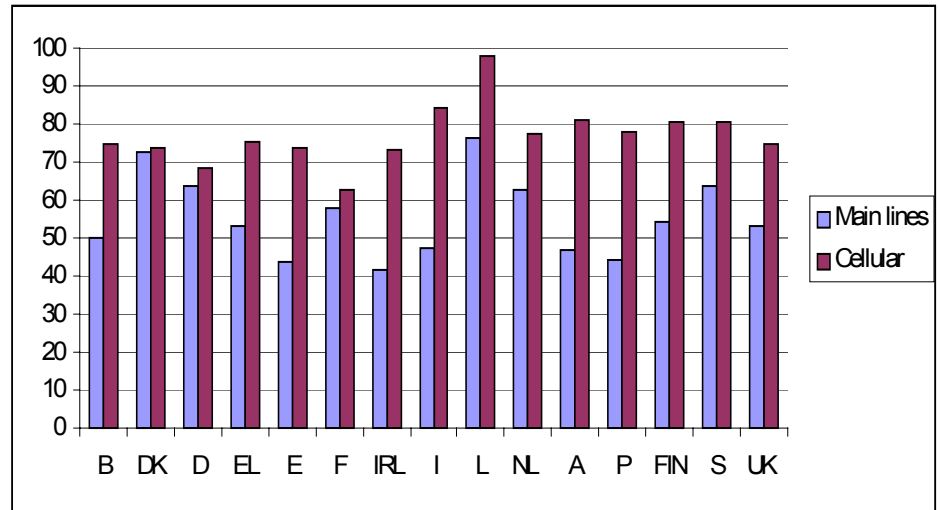


Figure 1: Number of subscribers per hundred inhabitants in 2001

Source: Eurostat and ITU

In the EU as a whole, turnover in telecommunication services increased by 11.3% between 2000 and 2001. Turnover from telecommunications was 3.5% of GDP in the EU.

The number of persons employed in telecommunications services has increased slowly over recent years, standing at 1.1 million in the EU at the end of 2001, which is equivalent to 0.7% of total employment.

The much faster growth of turnover compared to the number of persons employed implies a growth of labour productivity in the telecommunications area.

The number of mobile phone subscribers in the EU reached 278 million at the end of 2001, an increase of 18% over 2000. At the end of 2001 the density of mobile phones reached 73 per 100 EU inhabitants. The number of subscribers to the various networks, main lines and mobile phones, is close to saturation for penetration, but not for quality. The density of mobile phone subscribers in the USA (46/100) and Japan (59/100) is still lower than the EU average.

The prices for local, national and international calls in the EU decreased at the end of 2002, but still remain higher than prices in the USA. The period covers market de-regulation resulting in growing markets, higher productivity and lower prices.

The number of Internet hosts in the EU increased by 21% in 2002, reaching 15 million in December, according to RIPE NCC.

1. Telecommunication market in the national economies

Over the period 1995-2000 turnover of telecommunication enterprises grew steadily. The growth rate was higher than that of GDP, implying a greater share of telecommunications in the national economies. For most countries, telecommunications turnover in 2001 was double that in 1995; the highest average annual growth rate was registered in Portugal (25.4%). In 2001 compared with 2000, the

highest rate of growth was also recorded in Portugal (32.3%). The EU total grew consistently, reaching around 312 billion euro in 2001. As a percentage of GDP, turnover in telecommunications varies from 1.5 in Luxembourg to 5.8% in Portugal. Turnover per inhabitant shows that most money in telecommunications is spent in United Kingdom, Netherlands and Nordic countries.

	Mio EUR							- % -			EURO	
	1995	1996	1997	1998	1999	2000	2001	Distrib. among the countries	Av. growth rate	Growth rate	Turnov. 2001 / GDP	Turnov. 2001 / Inhabitant
								2001 / tot	2001 / 1995	2001 / 2000		
EU 15	137351 *	149597 *	162372 *	195339	230752 *	280543 *	312276 *	100,0	14,7 *	11,3 *	3,5	826
B	3298	3529	3983	4327	5543	6643	7522	2,4	14,7	13,2	3,0	733
DK	2571	2869	3126	3359	4158	4482	:	:	11,8 ²	:	2,6 ⁵	841 ⁸
D	37358 ¹	39276 ¹	40725 ¹	42862	47704	55322	61900	19,8	8,8	11,9	3,0	752
EL	2139	2468	2898	3085	3430	:	:	:	12,5 ³	:	2,9 ⁶	326 ⁸
E	8724	9164	9676	11741	14485	24087	:	:	22,5 ²	:	4,0 ⁵	606 ⁸
F	22637	23306	23711	26753	33866	36752	:	:	10,2 ²	:	2,6 ⁵	626 ⁸
IRL	1202	1402	1646	1817	2722 ¹	2870	3260	1,0	18,1	13,6	2,8	852
I	15303	18127	19993	28465	33131	36901 ¹	:	:	19,2 ²	:	3,2 ⁵	640 ⁸
L	230	250	270	300	308	309	:	:	6,1 ²	:	1,5 ⁵	709 ⁸
NL	6491	6765	7096	7886	9147	14650 ¹	:	:	17,7 ²	:	3,6 ⁵	923 ⁸
A	3293	3351	3386	3682	4535 ¹	:	:	:	8,3 ³	:	2,3 ⁶	561 ⁹
P	1815	2391	3641	4105	4850	5343	7067	2,3	25,4	32,3	5,8	689
FIN	1976	2216	2708	3252	3796	4364	4691	1,5	15,5	7,5	3,4	905
S	5343	5974	6215	6589	7265	8397	8275	2,6	7,6	-1,5	3,4	932
UK	24971	28509	33298	47116	55812	71651	73322	23,5	19,7	2,3	4,6	1224
IS	101	109	133	152	c	c	c	:	14,6 ⁴	:	2,1 ⁷	558 ¹⁰
N	2472	2824	3396	3590	5653	6391	5847	:	15,4	-8,5	3,1	1298

Table 1: Turnover of telecommunication enterprises in 2001

Source: Eurostat, (1) ITU

(*) Eurostat estimate; (2) Average growth rate covers 1995-2000; (3) Average growth rate covers 1995-1999; (4) Average growth rate covers 1995-1998; (c) confidential

2. ICT market

According to EITO, following an upward trend in the ICT market in the EU between 1997 and 2000, growth slowed between 2001 and 2000 (in current prices at 2000 exchange rates). The growth rate in the IT sector was 2.2% in 2001, compared with 12.0% recorded in 2000. In the telecommunications sector the growth rate in 2001 was 6.0%, compared with 13.8% registered in 2000

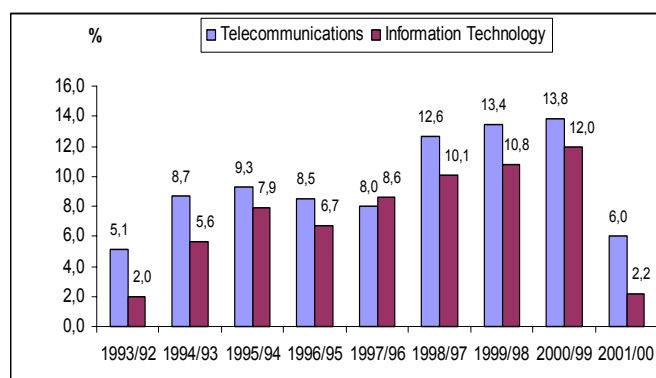


Figure 2: ICT market annual growth 1993-2001

Source: EITO

3. Employment in telecommunications

After a downward trend in employment in telecommunications at EU level registered up to 1996, the number of persons employed started to rise in 1997. It reached 1 million in 1999 and at the end of 2001 it represents 0.7% of total employment in

the EU. The highest increase in the number of persons employed 2001/2000 was recorded in Spain (3.6%). The highest turnover per person employed is in Portugal (436,000 euro).

	Persons employed							-%			Thou. Euro
								Distrib. among the countries	Av. growth rate	Growth rate	Turnov 2001 / Pers.empl.
	1995	1996	1997	1998	1999	2000	2001	2001 / tot	2001 / 1995	2001 / 2000	
EU 15	933,200	927,898	953,888	979,878	1,009,603	1,082,111 [*]	1,076,073 [*]	100.0	2.4 [*]	-0.6 [*]	290
B	26,012	26,193	21,000	23,886	25,074	28,495	28,580	2.7	1.6	0.3	263
DK	16,081	16,126	17,170	17,336	19,750	21,298	:	:	5.8 ²	:	210 ⁵
D	229,700	222,000	219,200	221,900	221,000	240,700	241,800	22.5	0.9	0.5	256
EL	24,581	23,808	22,741	21,925	25,966	25,732	26,163	2.4	1.0	1.7	132 ⁶
E	70,885	72,386	96,266	96,200	87,743	91,075	94,394	8.8	4.9	3.6	264 ⁵
F	151,448	164,720	165,042	169,099	169,770	173,094	152,608	14.2	0.1	-11.8	212 ⁵
IRL	11,707	11,560	10,995 ¹	12,055	15,000	17,450	17,000	1.6	6.4	-2.6	192
I	101,900	100,005	94,101	99,379	103,246	:	:	:	0.3 ³	:	321 ⁶
L	800	816	828	861	1,356	1,451	1,487	0.1	10.9	2.5	213 ⁵
NL	30,548	29,690	33,753	46,000	47,000	58,500	:	:	13.9 ²	:	250 ⁵
A	17,375	17,220	17,600	18,720 ¹	18,650 ¹	18,560 ¹	:	:	1.3	:	243 ⁶
P	19,845	18,617	18,786	19,177	16,671	16,270	16,204	1.5	-3.3	-0.4	436
FIN	16,405	16,856	17,976	19,448	21,601	24,190	25,015	2.3	7.3	3.4	188
S	29,913	25,001	33,930	31,492	30,276	31,411	29,443	2.7	-0.3	-6.3	281
UK	186,000	182,900	184,500	182,400	206,500	230,300	231,500	21.5	3.7	0.5	317
IS	1,010	999	1,093	1,246	1,337	1,441	1,497		6.8	3.9	122 ⁷
N	:	:	:	:	10,737	12,106	13,135		10.6 ⁴	8.5	526 ⁶

Table 2: Total employment in telecommunications

Source: Eurostat, (1) ITU;

(*) Eurostat estimate; (2) Average growth rate covers 1995-2000; (3) Average growth rate covers 1995-1999;

(4) Average growth rate covers 1999-2001 (5) Turnover 2000 / Persons empl.; (6) Turnover 1999 / Persons empl.;

(7) Turnover 1998 / Persons empl.

4.Subscribers to telecommunications networks

The number of main telephone lines in the EU increased slowly during the period 1995-2001; the average growth rate was 2.1%. In 2001 compared with 2000 the highest increases were recorded in Portugal (4.8%) and Germany (4.1%). A fall in the number of main telephone lines can be observed in Belgium, Greece, Austria, Finland and Sweden. At the end of 2001 the number of main lines in the EU reached 54.6 per 100 inhabitants. Luxembourg

(76.2/100) and Denmark (72.6/100) recorded the highest densities of fixed phones in 2001. Ireland (41.6/100), Spain (43.7/100) and Portugal (44.0/100) registered the lowest. The number of main lines appears to be close to saturation and vulnerable to competition with mobile communications. The quality of fixed network services is, however, improving with increasing numbers of ISDN and ADSL subscriptions, where growth continues rapidly.

	Number of main telephone lines thousands					- % -			Main telephones lines per 100 inhabitants				
						Distrib. among the countries	Average growth rate	Growth rate					
	1990	1995	1999	2000	2001	2001/ tot.	2001 / 1995	2001 / 2000	1990	1995	1999	2000	2001
EU15	153,439	182,623	200,040	203,954	206,357	100.0	2.1	1.2	42.2	49.2	53.3	54.2	54.6
B	3,913	4,632	5,261	5,302	5,132	2.5	1.7	-3.2	39.3	45.7	51.5	51.8	50.0
DK	2,911	3,203	3,638	3,826	3,882	1.9	3.3	1.5	56.7	61.4	68.5	71.8	72.6
D	32,000	42,000 ¹	48,210	50,220	52,280	25.3	3.7	4.1	40.4	51.5	58.8	61.1	63.6
EL	3,949	5,163	5,611	5,659	5,608	2.7	1.4	-0.9	39.0	49.4	53.3	53.6	53.1
E	12,603	15,095	16,700	17,453	17,531	8.5	2.5	0.4	32.5	38.5	42.3	43.9	43.7
F	28,085	32,400	34,100	33,987	34,074	16.5	0.8	0.3	49.6	56.1	58.3	57.9	57.7
IRL	983	1,310	1,770 ¹	1,590	1,590	0.8	3.3	0.0	28.0	36.4	47.4	42.1	41.6
I	22,350	24,845	26,502	27,153	27,303	13.2	1.6	0.6	39.4	43.4	46.0	47.1	47.2
L	184	234	311	331	336	0.2	6.2	1.6	48.4	57.5	72.4	76.0	76.2
NL	6,940	8,124	9,610	9,879	10,000	4.8	3.5	1.2	46.6	52.7	61.0	62.3	62.6
A	3,223	3,797	3,862 ¹	3,833 ¹	3,810	1.8	0.1	-0.6	41.9	47.2	47.8	47.3	46.9
P	2,379	3,586	4,230	4,311	4,518	2.2	3.9	4.8	24.0	35.8	41.7	42.3	44.0
FIN	2,670	2,810	2,850	2,849	2,806	1.4	0.0	-1.5	53.7	55.1	55.2	55.1	54.2
S	5,850	6,013	5,969	5,786	5,668	2.7	-1.0	-2.0	68.6	68.2	67.4	65.3	63.8
UK	25,400	29,411	31,416	31,775	31,819	15.4	1.3	0.1	44.2	50.3	52.9	53.3	53.1
IS	:	149	158	163	157	:	1.9	-3.4		55.7	57.5	58.4	55.5
N	:	3,176	3,314	3,302	3,314	:	1.4	0.4		73.0	74.6	73.7	73.6

Table 3 : Subscribers to main telephone

Source: Eurostat, (1) ITU

The number of subscriptions to cellular mobile services in the EU increased rapidly, reaching 278 million subscriptions at the end of 2001. The market for cellular mobile services is close to saturation and future growth can be expected to concentrate on quality of access and services. The highest growth between 2000 and 2001 was recorded in Luxembourg (42.4%), Belgium (36.7%) and Greece (34.2%); it should be noted that growth was over 10% in all EU countries in 2001, except Austria, where the density was already high (81/100). At the

end of 2001 the density of mobile phones reached 73 per 100 EU inhabitants. The highest were recorded in Luxembourg (98/100), Italy (84/100), Austria, Finland and Sweden (81/100 each). France (63/100) and Germany (68/100) recorded the lowest densities. The density of mobile phone subscribers in the USA (46/100) and Japan (59/100) is still lower than the EU average. In 2001 the number of mobile phone subscribers in the EU was higher than the number of main lines, which reached 206 million as can be seen in Table 3.

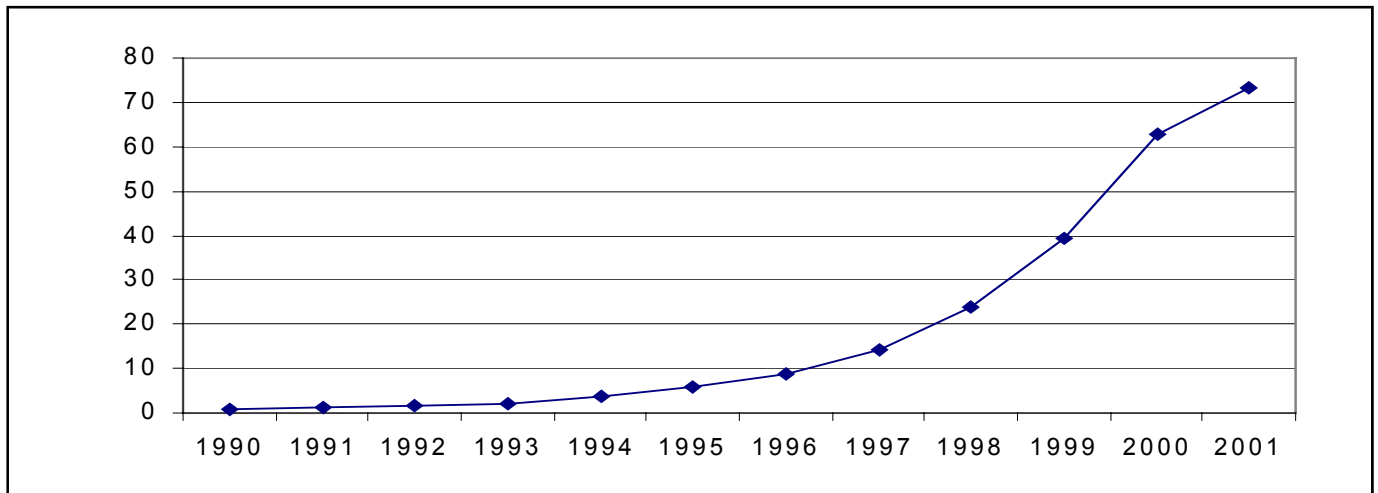


Figure 3: Subscriptions to cellular mobile services per 100 inhabitants, in the EU, 1990-2001

Source: Eurostat

	Number of mobile phone subscribers at the end of the year (1 000)					- % -			Mobile phone subscribers per 100 inhabitants				
	1990	1995	1999	2000	2001	Distrib. among the countries	Av. growth rate	Growth rate	1990	1995	1999	2000	2001
EU 15	3.127	21.512	148.359	235.963	277.591	100,0	53,2	17,6	0,9	5,8	39,6	62,7	73,4
B	45	235	3.193	5.629 ²	7.697	2,8	78,8	36,7	0,4	2,3	31,3	55,0	75,0
DK	148	822	2.629	3.543	3.954	1,4	29,9	11,6	2,9	15,8	49,5	66,5	73,9
D	273	3.764	23.446	48.202	56.245	20,3	56,9	16,7	0,3	4,6	28,6	58,7	68,4
EL	6	273	3.894	5.932	7.964	2,9	75,5	34,3	0,1	2,6	37,0	56,2	75,4
E	55	944	15.004	24.265	29.656	10,7	77,6	22,2	0,1	2,4	38,0	61,1	73,9
F	284	1.302	20.619	29.681	36.997	13,3	74,7	24,6	0,5	2,3	35,2	50,5	62,7
IRL	25	158	1.400	2.398	2.800	1,0	61,5	16,8	0,7	4,4	37,5	63,5	73,2
I	266	3.923	29.857	42.246 ¹	48.698 ¹	17,5	52,2	15,3	0,5	6,9	51,8	73,2	84,2
L	1	27	209	303	432	0,2	58,9	42,6	0,2	6,6	48,7	69,6	97,9
NL	79	539	6.800	10.755 ¹	12.352 ¹	4,4	68,5	14,8	0,5	3,5	43,1	67,8	77,3
A	73	384	4.206	6.253 ¹	6.566 ¹	2,4	60,5	5,0	0,9	4,8	52,0	77,2	80,8
P	6	341	4.671	6.665	7.978	2,9	69,1	19,7	0,1	3,4	46,0	65,4	77,7
FIN	258	1.039	3.364	3.673	4.176	1,5	26,1	13,7	5,2	20,4	65,2	71,0	80,6
S	465	2.025	5.125	6.369	7.158	2,6	23,4	12,4	5,5	23,0	57,9	71,9	80,6
UK	1.142	5.736	23.942	40.049	44.919	16,2	40,9	12,2	2,0	9,8	40,3	67,2	75,0
IS	10	31	162	215	248		41,5	15,3	4,0	11,6	58,8	77,0	87,6
N	197	981	2.745	3.368	3.689		24,7	9,5	4,7	22,6	61,7	75,2	81,9
USA	5.283	33.786	86.047	109.478	127.000		24,7	16,0	2,1	12,9	31,7	40,2	46,4
Japan	868	11.712	56.846	66.784	74.819		36,2	12,0	0,7	9,3	45,0	52,6	58,7
China	18	3.629	43.296	85.260	144.812		84,9	69,8	0,0	0,3	3,4	6,6	11,2

Table 4: Subscriptions to cellular mobile services

Source: Eurostat for European countries and ITU for USA, Japan and China.

(1) ITU; (2) IBPT

5. Prices for local, national and international (to USA) calls

During the period 1997-2002, the price of local calls in the EU decreased constantly, but still remains higher than the price for local calls in the USA. The highest price of local calls, in 2002, was registered in Austria and UK, the lowest in Finland, Italy and Spain. The price of national calls in 2002 is still

higher than the USA price. The highest price was recorded in Germany, UK and Italy, the lowest in Sweden. The highest price of international calls to the USA in 2002 was registered in Finland, UK and Austria, the lowest in the Netherlands, Sweden, Germany and Luxembourg.

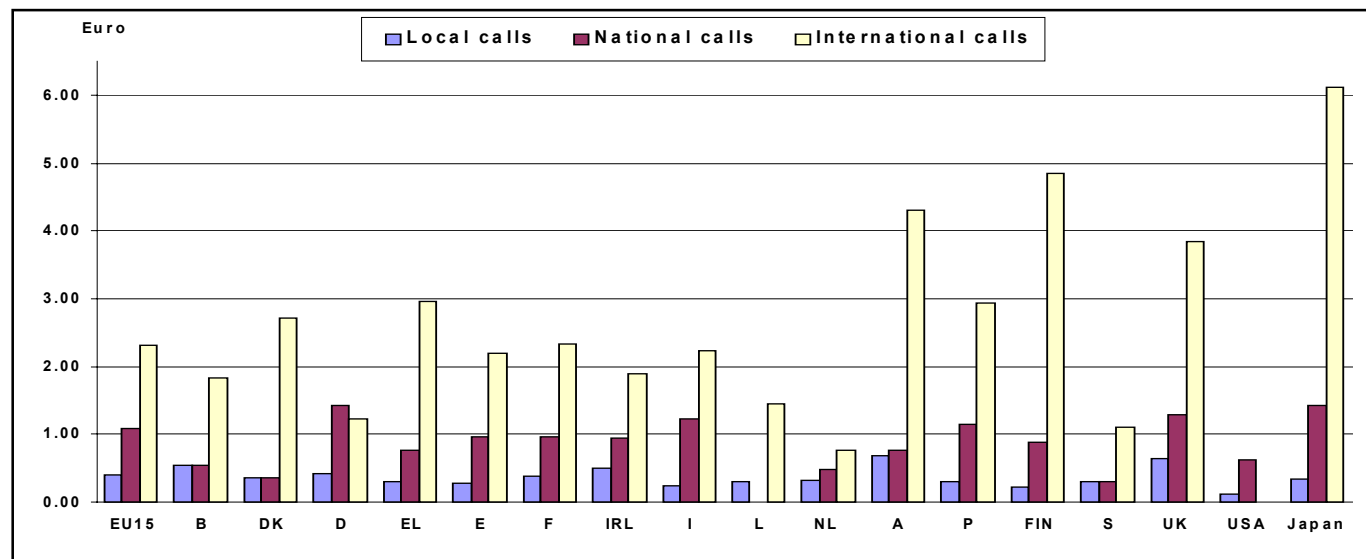


Figure 4: Prices for local, national and international calls in 2002

Source: Teligen

6. Internet hosts

In December 2002 the number of Internet hosts in the EU reached 15 million, which represents an annual growth rate of 20 % (compared with 2000). At the end of 2002, the highest numbers of Internet hosts were registered in the Netherlands, United Kingdom, Germany, France and Finland. Regarding

the density of Internet hosts, countries above the EU average (4/100) included Finland (23/100), Netherlands (19/100), Denmark (16/100), Sweden (10/100), United Kingdom (5/100) and Austria (5/100).

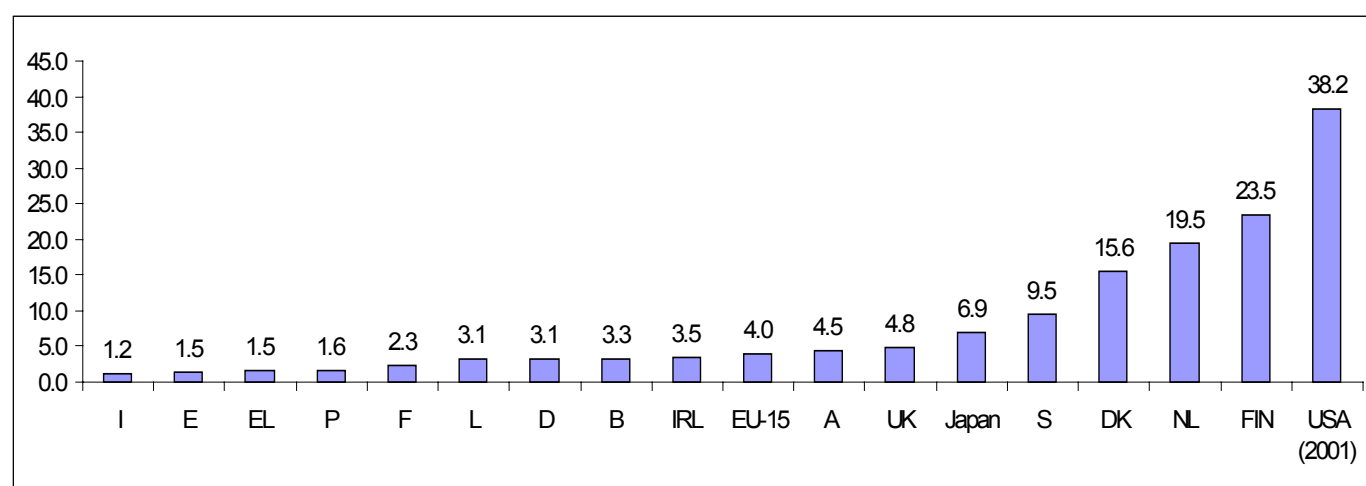


Figure 5: Internet hosts per 100 inhabitants in 2002

Source: RIPE NCC for EU countries and ISC for Japan

	Number of Internet hosts (in 1 000)							- % -			Internet hosts per 100 inhabitants				
								Distrib. among the countries	Av. growth rate	Growth rate					
	1995	1997	1998	1999	2000	2001	2002	2002 / tot.	2002 / 1995	2002 / 2001	95	97	99	01	02
EU-15	1,894	4,652	6,417	7,954	10,477	12,690	15,335	100.0	34.8	20.8	0.5	1.2	2.1	3.4	4.0
B	31	107	209	339	300	352	337	2.2	40.9	-4.4	0.3	1.1	3.3	3.4	3.3
DK	51	169	298	338	334	561	837	5.5	49.3	49.1	1.0	3.2	6.4	10.6	15.6
D	474	1,132	1,450	1,635	2,040	2,426	2,594	16.9	27.5	6.9	0.6	1.4	2.0	3.0	3.1
EL	8	28	50	75	111	143	161	1.0	54.4	12.3	0.1	0.3	0.7	1.4	1.5
E	51	196	307	470	455	539	590	3.8	41.7	9.5	0.1	0.5	1.2	1.4	1.5
F	151	355	511	607	1,122	789	1,389	9.1	37.3	76.0	0.3	0.6	1.0	1.3	2.3
IRL	13	40	56	64	111	128	136	0.9	39.3	6.6	0.4	1.1	1.7	3.4	3.5
I	75	254	387	394	1,020	680	673	4.4	36.7	-1.1	0.1	0.4	0.7	1.2	1.2
L	2	5	8	10	12	14	14	0.1	34.0	0.3	0.5	1.1	2.2	3.3	3.1
NL	172	391	626	959	1,624	2,632	3,137	20.5	51.4	19.2	1.1	2.5	6.1	16.7	19.5
A	53	108	173	263	483	326	368	2.4	31.8	12.9	0.7	1.3	3.2	4.0	4.5
P	12	42	56	78	62	247	165	1.1	45.9	-33.2	0.1	0.4	0.8	2.4	1.6
FIN	216	487	460	462	529	887	1,220	8.0	28.1	37.6	4.2	9.5	8.9	17.2	23.5
S	145	349	379	523	596	735	849	5.5	28.7	15.5	1.6	3.9	5.9	8.3	9.5
UK	440	988	1,449	1,739	1,678	2,231	2,866	18.7	30.7	28.5	0.8	1.7	2.9	3.8	4.8
IS	:	:	25	30	40	55	68		23.3	9.5	:	:	10.8	19.8	23.8
N	:	:	319	439	453	305	256		60.5	14.6	:	:	9.9	6.9	5.7
USA	6,055	20,624	30,489	53,176	80,567	106,193	:		61.2	16.0	2.3	7.7	19.6	38.2	38.2
Japan	269	1,169	1,688	2,637	4,641	7,118	8,714		64.4	12.0	0.2	0.9	2.1	5.6	6.9

Table 5: Number of Internet hosts

Source: ITU for 1995-2001

(1)RIPE NCC;(2) ISC

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Internet hosts computers directly connected to the Internet and with their own IP (Internet Protocol) address and full two-way access to other nodes on the network. The host data in this report refer to country code Top Level Domains only for EU countries and Japan (examples: .de or .uk), generic top level domains (examples: .com, .org) are not included for these countries. Top Level Domain does not necessarily entail that the host is physically located in the corresponding country, but reveals how many hosts are interested in being known in the respective countries. There are about 36 million .com domains today (NetSizer).

The **Information Technology (IT)** sector refers to the combined sectors of hardware for office machines, data processing equipment and of software and services.

The **Telecommunications** sector refers to telecommunications equipment and telecommunications services.

Main line is a telephone line connecting the subscriber's terminal equipment to the public switched network.

Mobile phone subscribers refers to users of portable telephones subscribing to an automatic public mobile telephone service which provides access to the Public Switched Telephone Network (PSTN) using cellular technology.

Web site is a location on the World Wide Web identified by a web address. A Web site consists of one or more pages of information and data (encoded with a hypertext mark-up language to make them readable by a web browser).

Eurostat estimate: The missing figures are calculated taking into account the average growth rate for previous years.

Abbreviations/ sources:

: Data not available

DG INFSO

Information Society General Direction of the European Commission - http://www.europa.eu.int/information_society

EITO

European Information Technology Observatory (EITO)

Address: Lyonerstr 18, D-60528 Frankfurt/Main, <http://www.eito.com>
Publication: EITO 2001

ITU

International Telecommunication Union (ITU)
Address: Place des Nations, CH-1211 Geneva Switzerland;
<http://www.itu.int/>

ITU is a UN-Organisation. Statistical publication: ITU Yearbook

ISC

Internet Software Consortium; <http://www.isc.org>

Produces twice a year (January, July) an Internet domain survey.

RIPE NCC

Réseaux IP Européens, Network Coordination Centre

<http://www.ripe.net/ripenncc/pub-services/stats/hostcount/>. Issues monthly hosts count statistics.

IBPT

Institut belge des services postaux et des telecommunications
Address: Tour Astro-Avenue de l'Astronomie 14 bte 21 -1210
Bruxelles; <http://www.ibpt.be>

Further information:

➤ Databases

NewCronos, Theme 4

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