



CHAPTER

13 Media Ownership and Concentration in Sweden

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Abstract

This chapter looks at media ownership and concentration in Sweden. After an overview of the Swedish media landscape, the remainder of the chapter is about print media (newspapers, book publishing, magazine publishing), audiovisual media (radio, broadcast television, multichannel TV platforms, video channels, film), telecommunications media (wireline and wireless telecom), and Internet media (Internet Service Providers). The Swedish market shows declining concentrations in TV broadcasting, book publishing, wireline telecom, film production and distribution, and ISPs. It shows rising concentrations for daily newspapers and magazines, and it demonstrates relatively sustained concentration indices for wireless telecom, satellite and cable TV, and radio broadcasting. The major telecom firms are Telia Sonera, Telenor, and Kinnevik. In print media, the top firms are Bonnier, and in audiovisual media, the public SVT, Bonnier, and Kinnevik. Com Hem dominates cable television.

Keywords: Swedish media market, media industry, ISP, cable TV, audiovisual media, telecommunications, Internet, Telia Sonera, Kinnevik, SVT, Bonnier, Com Hem Swedish media market, media industry, ISP, cable TV, audiovisual media, telecommunications, Internet, Telia Sonera, Kinnevik, SVT, Bonnier, Com Hem

Subject: Economic Sociology, Social Research and Statistics

Introduction

Sweden is the third largest country in Europe by land area but has a population of only 9.5 million people. As an urbanized country with a high standard of living, the Swedish media market benefits from Swedes' high literacy rates, availability of disposable income, and access to an extensive communications infrastructure. Print media, and newspapers in particular, holds a strong position in the Swedish media landscape. Both readership figures and advertising market shares for newspapers are very high by international standards. Sweden is also a global leader in digital television and broadband access.

Though newspapers remain popular, television is now the most widespread consumer medium, followed by newspapers, radio, and the Internet. In terms of advertising spending, newspapers continue to draw nearly 30% of total spending, whereas TV's share of advertising revenues (15%) is declining and will likely lose ground to Internet advertising, which currently has a 14% market share (Table 13.1).

Table 13-1. Media Penetration in Sweden (Audience Shares by %), 2011

TV	85
Newspapers	77
Radio	74
Internet	68
Magazines	41
Books	37
CD	27
Teletext	25
MP3	18
Video/DVD	12
Cinema	1

Source: Nordicom, 2011.

The Government of Sweden has long held that provision of high-quality public broadcasting is essential to the country's political health. It has pursued this in the audiovisual sector by subsidizing a large public service broadcasting network, and in the newspapers sector by providing extensive subsidies. The telecommunications sector was operated by the state and provided universal public service to the country until the 1990s. Sweden was one of the last countries in Europe to privatize the sector.

Because there are often just a few large players in most media sectors in the country, media watchdogs and regulators have long been concerned about concentration in Sweden.

Introduction

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Print Media

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Newspapers

The Swedish newspaper market is divided in two segments. One segment consists of regional and local morning papers, which have a combined circulation of 2.7 million copies, 93% of which are purchased through subscriptions and are home-delivered by the papers themselves. The other segment is shared between two of the largest national daily publishers and their evening-edition tabloids—*Aftonbladet* and *Expressen*, which are sold in grocery stores and news kiosks. Combined, they have a daily circulation of approximately 700,000 copies.

Sweden spends tens of millions of euros a year to subsidize newspapers in order to try to keep concentration low. Press subsidies were introduced by the Swedish Parliament between 1969 and 1975 and consist of three main components—operational support, development support, and joint distribution support. The subsidies were introduced in response to 15 years of growing market concentration in which 40 regional newspaper titles were forced to close. The first response was the institution of the operational support subsidy in 1971. It was aimed at providing financial assistance to the second and third largest newspapers in each region of the country. The papers covered by the operational support law are allowed to spend their subsidies on any aspect of their operations, but in order to qualify for the direct cash subsidy, the papers must have no more than 30% household coverage in their home region, register a circulation exceeding 2,000 paid-for copies, and produce at least 51% of their own original editorial material.¹ As a result, these criteria exclude the evening tabloids from being subsidized. The maximum annual subsidy in 2011 stood at US\$2.1 million (1.5 million euros) for provincial papers and US\$8.9 million (6.4 million euros) for metropolitan papers. In 2009, 23 dailies received operational support, along with 61 newspapers that do not publish daily editions.

The development support subsidy provides loans to financially weak newspapers to assist them in updating their production technologies. Whereas it encourages collaboration between applicants, it is important that these collaborations are restricted to noneditorial functions in order to preserve a plurality of editorial viewpoints. Lastly, the joint distribution support subsidy is meant to give all newspapers (nominally) equal market access. Since most papers in Sweden are sold by subscriptions and have morning home deliveries, the joint distribution support subsidy was implemented as incentive for the leading dailies to open up their distribution channels to their local competitors: the system subsidizes all participating papers with roughly one US cent per copy.

p. 340 The total cost of the three press subsidies has remained fairly stable since the 1990s, costing the state US\$69.5 million (50 million euros), corresponding to 2.3% of total media turnover, and 15–20% of the receiving newspapers' annual turnover. In addition, outside of the subsidy system, all print publishers benefit from a reduced value-added tax (VAT) for newspapers and books; normal VAT is 25%, but it is only 6% for these printed materials. And finally, parallel to the subsidies, the state has also imposed a 3% advertising tax on printed media, which generates revenue that more than covers the costs of the press subsidy program. However, since regulators no longer maintain the historical linkage between the advertising tax and the subsidies, most Swedish political parties agree that the advertising tax should be abolished. Even so, there is little political incentive to actually drive through such a change in the laws.

Through the Newspapers Subsidy Council, an agency of the Swedish Ministry of Culture, the state also provides around US\$16.7 million (12 million euros) to support the production and distribution of newspapers to the hearing and visually impaired. The funds are distributed to newspaper companies in order to produce audio recordings of their articles and distribute them at normal newspaper subscription prices (Table 13.2).

Table 13-2. Swedish Government Press Subsidies

	Operational Support (mil euros)	Development Support (mil euros)	Joint Distribution Support (mil euros)	Total Subsidies (mil euros)	% Change
1990/91	42.9	2.4	8.1	53.3	16.0
1991/92	42.1	3.4	7.8	53.2	0.0
1992/93	41.2	3.0	7.1	51.2	-3.8
1993/94	41.5	1.8	7.1	50.5	-1.3
1994/95	40.2	0.3	7.1	47.6	-5.8
1995	39.7	0.1	4.2	44.0	-1.0
1996	43.4	0.1	6.8	50.3	7.6
1997	45.6	0.1	6.7	52.4	4.1
1998	45.9		7.1	53.0	1.2
1999	43.1		7.1	50.3	-5.2
2000	42.9		7.3	50.2	-0.2
2001	41.1		7.4	48.5	-3.2
2002	40.1	7.4	-0.2	47.3	
2003	40.3	1.3	8.3	49.9	5.0
2004	41.1	1.2	8.2	50.4	1.1
2005	40.8	0.4	8.1	49.3	-2.2
2006	42.0		8.1	50.0	1.7
2007	41.9		7.1	49.1	-1.9
2008	42.2		7.2	49.4	0.6

Source: *Dagspressens ekonomi* (2008).

Despite all of these anticoncentration measures, three companies together hold 69% of the national market share for newspapers. Bonnier AB has consistently led the industry, though its share of the market has fluctuated from 24.8% in 1984 to 35.2% in 1996 and fell to 28.5% in 2008. Stampen and Schibsted, two publicly traded Swedish media groups, compete for second place, together controlling approximately 30% of the market. Mittmedia Fortvaltnings, another privately held Swedish company, has made considerable gains in the sector in recent years, jumping from a 2.6% market share in 1988 to a 7.6% share in 2008. Bonnier's major newspapers are *Dagens Nyheter*, *Expressen*, and *Sydsvenskan*; Stampen's most widely circulated daily is *Göteborgs-Posten*; and Schibsted's leading dailies are *Aftonbladet* and *Svenska Dagbladet*.

p. 341 The dominant firm, Bonnier AB, is a family-owned company that was founded in 1804 and is now a highly diversified, multimedia company operating in 17 countries. Within Sweden, ↴

p. 342 ↴ it has significant market penetration in the print, audiovisual, and film markets.

Overall, HHI values for newspapers have been gradually increasing but have so far stayed within the 1,400–1,500 range (Table 13.3).

Table 13-3. Daily Newspapers (Market Shares by Circulation)

	1984	1988	1992	1996	2000	2004	2008	2011 ²
Bonnier AB (Bonnier Family)	24.8	24.7	23.3	35.2	30.4	26.7	28.5	41.3
Stampen	9.0	8.7	9.8	10.6	8.8	8.2	16.5	12.4
Schibsted				9.1	14.4	14.9	14.8	10.3
Mittmedia Förvaltnings AB		2.6		3.2	4.0	4.9	7.6	
Norrköpings Tidningars Media					2.8	3.3	5.5	4.9
Gota Media AB						3.7	3.9	
Herenco AB	2.7	4.0	3.4	3.3	3.6	3.1	2.9	
Metro International (Kinnevik)					3.1	3.5	2.9	19.0
Nya Wermlands-Tidningen AB		3.7	4.3	4.0	3.6		2.6	
AB Upsala Nya Tidning							2.3	
VLT AB	2.8		3.1	3.3	4.1	4.2		
Centertidningar	2.7		2.8	4.0	3.5	3.8		
Sydostpress	3.2	2.7	2.8	3.0	3.3			
Svenska Dagbladet Holding	6.2	5.6	5.5	6.7				
LO		7.6	7.5					
Sydsvenska Dagbladet	6.7	6.3	6.7					
A-Pressen	11.2	7.9						
Nerikes Allehanda	2.6							
Others	28.1	26.2	30.8	17.6	18.4	23.7	12.5	12.1
Total Revenue (mil SEK) ¹	7,206	12,481	14,225	14,818	17,954	19,762	22,051	
Total Revenue (mil US\$)	792	1,997	2,418	2,223	1,975	2,767	3,308	
C4	51.8	48.9	47.3	61.6	57.7	54.7	67.3	83
HHI	946	922	827	1,554	1,308	1,104	1,435	2,350
<i>N</i> (>1%)	10	10	10	10	11	10	10	5
Noam Index	299	292	261	491	394	349	454	1,050

1 Swedish Krona (SEK). Sweden has not switched over to the euro, though some sources give statistics for Swedish media in euros.

Book Publishing

Sweden has had a highly commercialized book publishing sector since the 19th century, and it is a world leader in the market for translated publications. The two dominant players in the Swedish book publishing industry are Bonnier AB and Liber. Between them, they hold over one-third of the market, though that share has declined from what was once a combined 50% market share. Bonnier AB owns multiple imprints, while Liber is the leading publisher of educational texts in Sweden. From 1996 to 2008, both Bonnier AB and Liber lost shares in the market, as did many of the smaller publishers (Table 13.4).

Table 13-4. Book Publishing (Market Shares by Revenue)

	1996	2000	2004	2008
Bonnier AB (Bonnier Family)	26.7	23.2	28.1	22.6
Liber	29.0	18.2	15.9	13.1
KF/Norstedts Förlagsgrupp	4.5	6.6	7.7	7.0
Forma Publishing Group				4.6
B Wahlströms Förlag	2.6	1.9	2.0	
Natur och Kultur	7.4		5.6	4.5
Berling Media	6.0	5.4	5.0	3.9
Studentlitteratur	6.4	5.2	4.4	3.1
Cydonia	8.9	6.4	4.0	2.1
Egmont (Denmark)	6.0	5.6	5.4	2.1
Piratförlaget				1.3
Sanoma (Finland)	2.5	3.5	2.4	1.3
Ordfront		1.6		
Others	0.0	22.4	19.5	34.4
Total Revenue (mil SEK)	3,935	4,900	5,619	7,000
Total Revenue (mil US\$)	509	539	787	1,050
C4	72.0	54.4	57.3	47.3
HHI	1,835	1,059	1,234	809
<i>N</i> (>1%)	10	10	10	12
Noam Index	580	335	390	244

Magazine Publishing

Sweden has one of the most active magazine markets in the European Union. It is highly commercialized, and the government has had less influence on this print market than it has on newspapers.

The two major players in the Swedish magazine publication industry are Bonnier AB and Carl Allers Etablissement, which together account for over half of the market. Bonnier, with a 31% Swedish market share in 2008, also publishes magazines in foreign markets: in 2007 it bought the rights to 18 magazines from Time, Inc. (US). Carl Allers Etablissement, a private media corporation with 34 monthly titles, holds 23.5% of the Swedish market share. Smaller publishers include Egmont International Holding and the Forma Publishing Group. Egmont International Holding, founded in 1878, is one of Sweden's oldest media groups, and it is in close competition with Forma Publishing Group, which specializes in book and magazine publishing.

p. 343 The Swedish magazine market is slightly trending toward higher concentration indices. The C4 jumped from 68.5 in 2004 to 73.7 in 2008, and the HHI increased from 1,540 to 1,808 over the same period. Comparatively, this HHI range is exceptionally high for magazines (Table 13.5).

Table 13-5. Magazine Publishing (Market Shares by Revenue)

	2004	2008	2010
Bonnier AB (Bonnier Family)	27.7	31.0	32.9
Carl Allers Etablissement	21.9	23.5	24.9
Egmont International Holding (Denmark)	11.5	11.0	11.7
Forma Publishing Group	7.4	8.2	8.7
LRF Media	5.3	7.4	7.8
IDG/International Data Group (US)	5.0	5.1	5.4
Talentum		3.3	3.5
Förlags AB Albinsson & Sjöberg	3.5	2.9	3.1
Mentor Online	2.5	2.5	2.7
Frida Förlag		1.6	1.7
Hjemmet Mortensen	4.3		
Hachette Filipacchi Sverige (Lagardère Group, France)	2.6		
E+T, Ekonomi och Teknik Förlag	2.5		
Medströms			
Others	5.8	3.5	5.9
Total Revenue (mil SEK)	6,200	7,200	9,520
Total Revenue (mil US\$)	868	1,080	
C4	68.5	73.7	78.2
HHI	1,540	1,808	2,037
<i>N</i> (>1%)	11	10	10
Noam Index	464	572	644

Print Media

Newspapers

The Swedish newspaper market is divided in two segments. One segment consists of regional and local morning papers, which have a combined circulation of 2.7 million copies, 93% of which are purchased through subscriptions and are home-delivered by the papers themselves. The other segment is shared between two of the largest national daily publishers and their evening-edition tabloids—*Aftonbladet* and *Expressen*, which are sold in grocery stores and news kiosks. Combined, they have a daily circulation of approximately 700,000 copies.

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2,000 paid-for copies, and produce at least 51% of their own original editorial material.¹ As a result, these criteria exclude the evening tabloids from being subsidized. The maximum annual subsidy in 2011 stood at US\$2.1 million (1.5 million euros) for provincial papers and US\$8.9 million (6.4 million euros) for metropolitan papers. In 2009, 23 dailies received operational support, along with 61 newspapers that do not publish daily editions.

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1991/92	42.1	3.4	7.8	53.2	0.0
1992/93	41.2	3.0	7.1	51.2	-3.8
1993/94	41.5	1.8	7.1	50.5	-1.3
1994/95	40.2	0.3	7.1	47.6	-5.8
1995	39.7	0.1	4.2	44.0	-1.0
1996	43.4	0.1	6.8	50.3	7.6
1997	45.6	0.1	6.7	52.4	4.1
1998	45.9		7.1	53.0	1.2
1999	43.1		7.1	50.3	-5.2
2000	42.9		7.3	50.2	-0.2
2001	41.1		7.4	48.5	-3.2
2002	40.1	7.4	-0.2	47.3	
2003	40.3	1.3	8.3	49.9	5.0
2004	41.1	1.2	8.2	50.4	1.1
2005	40.8	0.4	8.1	49.3	-2.2
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Source: *Dagspressens ekonomi* (2008).

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Schibsted				9.1	14.4	14.9	14.8	10.3
Mittmedia Förvaltnings AB		2.6		3.2	4.0	4.9	7.6	
Norrköpings Tidningars Media					2.8	3.3	5.5	4.9
Gota Media AB						3.7	3.9	
Herenco AB	2.7	4.0	3.4	3.3	3.6	3.1	2.9	
Metro International (Kinnevik)					3.1	3.5	2.9	19.0
Nya Wermlands-Tidningen AB		3.7	4.3	4.0	3.6		2.6	
AB Upsala Nya Tidning							2.3	
VLT AB	2.8		3.1	3.3	4.1	4.2		
Centertidningar	2.7		2.8	4.0	3.5	3.8		
Sydostpress	3.2	2.7	2.8	3.0	3.3			
Svenska Dagbladet Holding	6.2	5.6	5.5	6.7				
LO		7.6	7.5					
Sydsvenska Dagbladet	6.7	6.3	6.7					
A-Pressen	11.2	7.9						
Nerikes Allehanda	2.6							
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Table 13-4. Book Publishing (Market Shares by Revenue)

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Liber	29.0	18.2	15.9	13.1
KF/Norstedts Förlagsgrupp	4.5	6.6	7.7	7.0
Forma Publishing Group				4.6
B Wahlströms Förlag	2.6	1.9	2.0	
Natur och Kultur	7.4		5.6	4.5
Berling Media	6.0	5.4	5.0	3.9
Studentlitteratur	6.4	5.2	4.4	3.1
Cydonia	8.9	6.4	4.0	2.1
Egmont (Denmark)	6.0	5.6	5.4	2.1
Piratförlaget				1.3
Sanoma (Finland)	2.5	3.5	2.4	1.3
Ordfront		1.6		
Others	0.0	22.4	19.5	34.4
Total Revenue (mil SEK)	3,935	4,900	5,619	7,000
Total Revenue (mil US\$)	509	539	787	1,050
C4	72.0	54.4	57.3	47.3
HHI	1,835	1,059	1,234	809
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Table 13-5. Magazine Publishing (Market Shares by Revenue)

	2004	2008	2010
Bonnier AB (Bonnier Family)	27.7	31.0	32.9
Carl Allers Etablissement	21.9	23.5	24.9
Egmont International Holding (Denmark)	11.5	11.0	11.7
Forma Publishing Group	7.4	8.2	8.7
LRF Media	5.3	7.4	7.8
IDG/International Data Group (US)	5.0	5.1	5.4
Talentum		3.3	3.5
Förlags AB Albinsson & Sjöberg	3.5	2.9	3.1
Mentor Online	2.5	2.5	2.7
Frida Förlag		1.6	1.7
Hjemmet Mortensen	4.3		
Hachette Filipacchi Sverige (Lagardère Group, France)	2.6		
E+T, Ekonomi och Teknik Förlag	2.5		
Medströms			
Others	5.8	3.5	5.9
Total Revenue (mil SEK)	6,200	7,200	9,520
Total Revenue (mil US\$)	868	1,080	
C4	68.5	73.7	78.2
HHI	1,540	1,808	2,037
<i>N</i> (>1%)	11	10	10
Noam Index	464	572	644

Audiovisual Media

Radio

Sweden has a strong public service broadcasting tradition that is based off the United Kingdom's BBC model, but audiovisual policy must now be harmonized with supranational EU policies meant to increase the presence of commercial broadcasters and independent production companies. Today, the Swedish public broadcasting network consists of three entities—the TV broadcaster Sveriges Television (SVT), the radio broadcaster Sveriges Radio (SR), and the “educational service” Utbildningsradion (UR). Until the late 1980s commercial broadcasting did not exist in Sweden, thus giving SR's four national channels a monopoly. Since then, increased competition for audience shares has driven public service operations toward a multichannel, multiplatform strategy; today SR includes a portfolio of four national radio channels, 28 local channels, and more than a dozen online stations.

SR has a strong market position as the former public monopolist, in large part due to the licensing fees collected on its behalf. A mandatory US\$300 (2,000 SEK) licensing fee for every household with a receiver provides the funding for the public broadcasters. Radiotjänst, a subsidiary, collects the fees. The commercial radio market's combined gross advertising revenue stood at US\$1.1 billion (7.3 billion SEK) in 2008; SR took in licensing fees worth US\$330 million (2.2 billion SEK) that same year. ↪ SR has argued that the funding is needed to produce content in the absence of commercial alternatives, but commercial broadcasters have

argued that there will never be a financial space for them to expand in so long as these licensing funds continue to exist for SR. The commercial networks also must contend with the impact of the state's policy of auctioning off of broadcasting licenses. During the 1990s, when many networks overestimated the market for radio advertising, they overbid on these licenses and suffered heavy losses. The result of this has been two decades of rapid market concentration and cost rationalization among commercial broadcasters. Some officials have proposed that broadcasting permits should now be sold at (relatively low) fixed prices instead of at auction (in addition to public service operations, the state issues broadcasting permits to approximately 900 community radio broadcasters that are often financially supported by local and regional authorities).

The commercial broadcaster Modern Times Group (MTG) occupies a distant second place in the radio market after SR. ProSiebenSat.1 (Germany) is the third main national radio broadcaster, having acquired Scandinavian Broadcasting Group (SBS) in 2007, thus gaining a 10% market share in 2008. Despite SR's decreasing market share, Swedish radio has remained highly concentrated, and it is likely to remain so unless policy toward the commercial broadcasters changes. The HHI reflects this trend, as it stood at 5,840 in 2008 (Table 13.6).

Table 13-6. Radio Group (Market Shares by Revenue)

	1996	2000	2004	2008	2011
SR (public)	84.5	71.8	75.9	75.0	74.8
MTG (Kinnevik)	1.5	5.8	7.8	14.6	11.8
ProSiebenSat.1 (Germany)				1.0	9.6
SBS Broadcasting	1.4	4.1	5.6		
NRJ (France)	1.9	6.2	2.0	1.4	1.4
Norrköpings Radio & Co.	0.6			0.8	0.7
Stampen	1.6			0.7	0.7
Upsala Nya Tidning	0.2	0.5	0.4	0.3	0.4
Västerbottens-Kuriren	0.2			0.3	0.4
Mittmedia	0.4	0.8	0.6	0.2	0.1
Fria Media	1.5	5.0	3.1		
Bonnier	3.4	5.4	3.0		
Hallandsposten	0.2		0.3		
RTL (Bertelsmann AG, Germany)		1.0			
VLT		0.4			
Others	2.6	0.0	1.3	0.0	0.0
Total Revenue (mil SEK)	2,272	2,291	2,774	2,919	3,039
Total Revenue (mil US\$)	341	252	388	438	457
C4	91.4	89.2	92.4	92.0	97.6
HHI	7,152	5,263	5,866	5,840	5,829
<i>N</i> (>1%)	7	5	4	3	4
Noam Index	2,703	2,353	2,395	2,973	2,914

Before the 1990s, terrestrial analog broadcasting in Sweden was dominated by SVT. But since 1991 and the switchover of the country to digital terrestrial television (DTT), a wave of new commercial broadcasters, alongside cable TV operators, have emerged. Four companies dominate the sector: the public broadcaster SVT and the three main commercial broadcasters of TV4 AB, MTG-Viasat Broadcasting, and ProSiebenSat.1.

SVT includes five national channels and is expanding its online broadcasting presence. It has maintained a strong market position thanks to the receipt of substantial state subsidies: in 2008, SVT received US\$585 million (3.9 billion SEK) from the government. By way of comparison, the combined advertising revenues for commercial broadcasters stood at US\$750 million (5 billion SEK). However, in the long-term, commercial advertising revenues have been growing whereas the licensing fees, when adjusted for inflation, have generally stayed flat since the traditional public broadcasters are not adding many new households (and their US\$300.00 installation fees) to their audience shares. Subscription and distribution revenues for commercial channels have also been increasing rapidly over the last decade.

Public opinion favors the public broadcasters, but SVT has also had increasing difficulty in attracting a younger demographic, and its overall market shares are declining. It has also been under government scrutiny for using the licensing fees to compete on digital platforms with on-demand online TV and mobile services. Fortunately, the government recently approved these initiatives as a natural part of public service operations in a digital age, legally classifying public service as a type of content rather than a type of distribution.

SVT's lead has declined substantially since the 1990s, falling from 50% in 1996 to 30% in 2008 (of course, during the 1970s, that market share effectively stood at 100%). Much of this loss can be attributed to the entry into the market of ProSiebenSat.1 (Germany), which expanded its services to Sweden in 2007.³ The Swedish firms TV4 AB and MTG-Viasat Broadcasting have seen slower but continued growth for their market shares since 1996. TV4 AB, which has been broadcasting since 1990, is a subsidiary of Bonnier AB through Nordic Broadcasting Oy since 2007. MTG-Viasat is a satellite TV platform that operates in Sweden, Norway, Denmark, Finland, Estonia, Latvia, Lithuania, and Ukraine.⁴ Its parent, MTG, was initially established and owned by the major Swedish investment company Kinnevik, although it has been spun off in 1997 with share distribution to Kinnevik shareholders and now has a dual listing on the Stockholm Stock Exchange and the NASDAQ in the United States.

Because of the high penetration of cable TV and the decision to shut off analog broadcasting in favor of digital by 2008, distinctions between terrestrial, cable, and satellite channels have largely disappeared in Sweden.

The overall concentration of the broadcasting industry in Sweden remains high, though the C4 decreased from 92% in 1996 to 88% in 2004 due to SVT's decline in market share and the entrance of a number of smaller companies into the market. The HHI and Noam index both register a slow decline from 1996 on, indicating a gradual decrease in concentration in the industry as SVT has gradually lost its monopoly. The industry remains a relatively concentrated one, however, with HHI staying above 2,300 in 2008 and two entities—SVT and Bonnier's TV4 AB—controlling over half of the market shares (Table 13.7).

Table 13-7. TV Broadcasting (Market Shares by Revenue)

	1996	2000	2004	2008	2012 ⁵
Terrestrial Broadcasters					
SVT AB (public)	47.8	40.0	39.6	29.2	26.4
TV4 AB (Bonnier AB, Bonnier Family)	22.4	28.0	22.7	26.6	29.8
MTG—Viasat Broadcasting (Kinnevik) (both broadcaster and satellite)	15.0	16.4	17.1	23.6	21.8
ProSiebenSat.1 (Germany)				15.7	11.3
SBS Broadcasting	3.2	5.8	7.7		
Sveriges Utbildningsradio AB	4.5	3.4	3.0	2.3	
Lokal-TV Nätverket i Sverige AB			0.1		
MTV Networks AB (Viacom, US)		0.2	0.9	1.3	
Satellite-delivered Channels					
Nonstop Television AB			0.2	0.6	
Eurosport Television AB (France)		0.5	0.6	0.6	
Turner Broadcasting System Sweden (Time Warner, US)		0.1		0.1	
Axess Publishing					
C MORE ¹ (Telenor/TV 4 AB)	6.9	5.2	8.1		
Kunskaps-TV		0.5			
Others	0.2	0.0	0.0	0.0	10.7
Total Revenue (mil SEK)	7,200	8,947	10,250	13,550	
Total Revenue (mil US\$)	1,080	984	1,435	2,033	
C4	92.1	90.2	87.6	95.1	89.3
HHI	3,090	2,729	2,514	2,369	2,188
<i>N</i> (>1%)	6	6	6	6	4
Noam Index	1,261	863	1,026	967	1,094

1 Originally Canal+ Television AB, C More was originally established by Vivendi (France). After a series of sales, TV4 AB and Telenor (Norway) now jointly own it, with TV4 AB having a 65% stake and Telenor a 35% stake.

Multichannel TV Platforms

For multichannel platforms, by far the largest is the cable operator Com Hem, with 38.4 % of the market, followed by the semi-public telecom Telia (12.7%) and the public Canal Digital Sverige (13%) (Table 13.8). Market concentration dropped in the 1990s but rose again.

Table 13-8. Multichannel Video Platforms: Cable MSOS, DBS, IPTV (Market Shares by Revenue)

	1996	2000	2004	2008	2012
Com Hem (BC Partners, UK)			23.6	37.7	38.4
Canal Digital Sverige (public) (Telenor, Norway) ¹	6.8	11.3	15.7	12.5	13
Tele2 (Kinnevik)		5.4	3.0		6.6
UPC Sverige (Liberty Global, US)		9.7	9.7		
Telia (public)	23.0	19.5			12.7
StjärnTVnätet	9.3				
Sweden on Line (Alte)	4.6				
Teracom (public)	34.9	23.8	17.9	20.6	
MTG/Viasat (Kinnevik)	2.0	6.6	7.5	10.0	7.3
Boxer					13
Others	19.5	23.8	22.6	19.2	8.9
Total Revenue (mil SEK)	2,611	3,493	6,690	10,140	9,300
Total Revenue (mil US\$)	392	384	937	1,521	1,400
C4	73.9	64.2	67.0	80.8	77.1
HHI	1,904	1,238	1,284	2,101	2,071
<i>N</i> (>1%)	6	6	6	4	6
Noam Index	777	506	524	1,050	846

1 Originally a property of Vivendi's (France) Canal+, Canal Digital Sverige has since 2001 been part of Telenor (Norway). The Government of Norway has a 53% stake in the company.

p. 346 Video Channels

Satellite TV

The satellite TV market is led by three companies: Teracom, Telenor/Canal Digital Sverige, and MTG/Viasat. Teracom is the market leader, holding nearly half of the total market share in 2008 with 49.8% (though down since 1996, when the company dominated the market at 80%). These three companies together hold 100% of the entire cable TV market. Although the market shares have become more distributed among the three companies since 1996, Teracom still holds half of the total market share.

Teracom benefits greatly from being the Swedish government's terrestrial broadcast transmission service company: it owns all Swedish transmission sites and distributes all terrestrial radio and TV channels—private and public, analog (up until 2008) and digital. Its main product areas are pay TV, radio and television broadcasting, and data capacity services. Telenor, a state-owned Norwegian company, offers mobile and fixed telephony as well as Internet access and content (Table 13.9). ↵

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Table 13-9. DBS TV Programming (Market Shares by Revenue)

	1996	2000	2004	2008
Teracom (public)	80.0	62.3	46.0	49.8
Canal Digital Sverige (public) (Telenor, Norway)		20.4	34.7	26.1
Canal+/Canal Digital Sverige (Vivendi, France)	15.5			
MTG/Viasat (Kinnevik)	4.5	17.3	19.3	24.1
Others	0.0	0.0	0.0	0.0
Total Revenue (mil SEK)	1,471	2,161	4,090	5,940
Total Revenue (mil US\$)	221	238	573	891
C4	100	100	100	100
HHI	6,659	4,599	3,694	3,743
<i>N</i> (>1%)	3	3	3	3
Noam Index	3,845	2,655	2,133	2,161

p. 348 **Cable TV**

While shares were fairly evenly distributed among three or four companies between 1996 and 2004, shares are now very concentrated between only two (Com Hem and Canal Digital Sverige) as of 2008. Since 2008, Com Hem has dominated the cable TV market, holding a 90.9% market share. Canal Digital Sverige, formerly part of Vivendi (France) but now owned by Telenor (Norway), holds a 4.2% market share. Canal Digital Sverige began as a direct-broadcast satellite service in Sweden, Norway, Denmark, and Finland and has since developed into a cable TV operator in Norway, Sweden, and Denmark; a DTT provider in Finland; and an IPTV operator in Sweden and Denmark.

Com Hem is a private telecommunications firm that was founded in 1983. It was spun off of the former state-owned telecom provider Televerket, which has enabled it to retain its high market share even after privatization. Its low market can also partly be explained by the fact that it has been ranked “as the television brand with the least satisfied customers in Sweden” in 2007, 2008, and 2009, according to the Swedish Quality Index (Svensky Kvalitetsindex), an independent customer survey company.”⁶ Com Hem was owned by a series of private equity firms, including the Carlyle Group (UK), and in 2011 was acquired by BC Partners (UK), the chief owner of the IntelSat consortium.

The HHI has increased from 3,331 in 1996 to 8,285 in 2008, thus demonstrating an increase of almost 5,000 over the 22-year period; the high C4 is also indicative of the duopolistic nature of the market (Table 13.10).

Table 13-10. Cable TV Programming Channels (Market Shares by Revenue)

	1996	2000	2004	2008
Com Hem (BC Partners, UK)			60.7	90.9
Telenor/Canal Digital Sverige (public) (Telenor, Norway)		9.3	5.8	4.2
Tele2 (Kinnevik)		14.3	7.7	
UPC Sverige (Liberty Global, US)		25.3	25.0	
TeliaSonera (public)	52.6	51.1		
StjärnTVnätet	21.3			
Sweden on Line (Alte)	10.6			
Others	15.5	0.0	0.8	4.9
Total Revenue (mil SEK)	1,140	1,332	2,600	4,200
Total Revenue (mil US\$)	171	147	364	630
C4	84.5	100.0	99.3	95.1
HHI	3,331	3,546	4,409	8,285
<i>N</i> (>1%)	3	4	4	2
Noam Index	1,923	1,773	2,204	5,858

Film

Bonnier AB is again one of the major market shareholders, here in the film production and distribution industry, with a market share of 29.5%. Bonnier AB's two main competitors are Schibsted, with a market share of 13.9%, and MTG, with a market share of 10.5%. In 2008, the concentration indices for these three shareholders significantly decreased. In 2008, Bonnier AB went from almost 30% to 22.4%, losing around 8% of its market share. Similarly, Schibsted lost around 5%, bringing it down to a 7.7% market share. MTG's shares dipped down to 3.2%.

In 2004, HHI was 1,131 but fell in 2008 to 751. The leading US-based Hollywood majors have a relatively small share of the market (Table 13.11).

Table 13-11. Film Production/Distribution (Market Shares by Box Office %)

	2004	2008
Bonnier AB (Bonnier Family)	25.9	22.4
Egmont International (Denmark)	7.1	9.6
Schibsted	13.9	7.7
Bonver Videodata AB	5.2	4.9
MPP MediaTec Group		4.0
Sony (Japan/US)		3.7
De Agostino (Italy)		3.6
20th Century Fox (News Corp., Murdoch Family, US/UK/AUS)	4.1	3.2
Walt Disney Studios (US)	5.7	3.2
MTG (Kinnevik)	10.5	3.2
Universal Pictures Nordic (Comcast/GE, US)	4.5	
MTV Produktion (Bonnier AD, Bonnier Family)	2.2	
Kanal 75	2.3	
Warner Bros. Entertainment Sweden (Time Warner, US)	2.3	
Others	18.6	34.5
Total Revenue (mil SEK)	6,615	9,146
Total Revenue (mil US\$)	926	1,372
C4	57.5	44.7
HHI	1,131	751
<i>N</i> (>1%)	10	10
Noam Index	358	237

Audiovisual Media

Radio

Sweden has a strong public service broadcasting tradition that is based off the United Kingdom's BBC model, but audiovisual policy must now be harmonized with supranational EU policies meant to increase the presence of commercial broadcasters and independent production companies. Today, the Swedish public broadcasting network consists of three entities—the TV broadcaster Sveriges Television (SVT), the radio broadcaster Sveriges Radio (SR), and the “educational service” Utbildningsradion (UR). Until the late 1980s commercial broadcasting did not exist in Sweden, thus giving SR's four national channels a monopoly. Since then, increased competition for audience shares has driven public service operations toward a multichannel, multiplatform strategy; today SR includes a portfolio of four national radio channels, 28 local channels, and more than a dozen online stations.

SR has a strong market position as the former public monopolist, in large part due to the licensing fees collected on its behalf. A mandatory US\$300 (2,000 SEK) licensing fee for every household with a receiver provides the funding for the public broadcasters. Radiotjänst, a subsidiary, collects the fees. The commercial radio market's combined gross advertising revenue stood at US\$1.1 billion (7.3 billion SEK) in 2008; SR took in licensing fees worth US\$330 million (2.2 billion SEK) that same year. ↪ SR has argued that the funding is needed to produce content in the absence of commercial alternatives, but commercial broadcasters have

argued that there will never be a financial space for them to expand in so long as these licensing funds continue to exist for SR. The commercial networks also must contend with the impact of the state's policy of auctioning off of broadcasting licenses. During the 1990s, when many networks overestimated the market for radio advertising, they overbid on these licenses and suffered heavy losses. The result of this has been two decades of rapid market concentration and cost rationalization among commercial broadcasters. Some officials have proposed that broadcasting permits should now be sold at (relatively low) fixed prices instead of at auction (in addition to public service operations, the state issues broadcasting permits to approximately 900 community radio broadcasters that are often financially supported by local and regional authorities).

The commercial broadcaster Modern Times Group (MTG) occupies a distant second place in the radio market after SR. ProSiebenSat.1 (Germany) is the third main national radio broadcaster, having acquired Scandinavian Broadcasting Group (SBS) in 2007, thus gaining a 10% market share in 2008. Despite SR's decreasing market share, Swedish radio has remained highly concentrated, and it is likely to remain so unless policy toward the commercial broadcasters changes. The HHI reflects this trend, as it stood at 5,840 in 2008 (Table 13.6).

Table 13-6. Radio Group (Market Shares by Revenue)

	1996	2000	2004	2008	2011
SR (public)	84.5	71.8	75.9	75.0	74.8
MTG (Kinnevik)	1.5	5.8	7.8	14.6	11.8
ProSiebenSat.1 (Germany)				1.0	9.6
SBS Broadcasting	1.4	4.1	5.6		
NRJ (France)	1.9	6.2	2.0	1.4	1.4
Norrköpings Radio & Co.	0.6			0.8	0.7
Stampen	1.6			0.7	0.7
Upsala Nya Tidning	0.2	0.5	0.4	0.3	0.4
Västerbottens-Kuriren	0.2			0.3	0.4
Mittmedia	0.4	0.8	0.6	0.2	0.1
Fria Media	1.5	5.0	3.1		
Bonnier	3.4	5.4	3.0		
Hallandsposten	0.2		0.3		
RTL (Bertelsmann AG, Germany)		1.0			
VLT		0.4			
Others	2.6	0.0	1.3	0.0	0.0
Total Revenue (mil SEK)	2,272	2,291	2,774	2,919	3,039
Total Revenue (mil US\$)	341	252	388	438	457
C4	91.4	89.2	92.4	92.0	97.6
HHI	7,152	5,263	5,866	5,840	5,829
<i>N</i> (>1%)	7	5	4	3	4
Noam Index	2,703	2,353	2,395	2,973	2,914

Before the 1990s, terrestrial analog broadcasting in Sweden was dominated by SVT. But since 1991 and the switchover of the country to digital terrestrial television (DTT), a wave of new commercial broadcasters, alongside cable TV operators, have emerged. Four companies dominate the sector: the public broadcaster SVT and the three main commercial broadcasters of TV4 AB, MTG-Viasat Broadcasting, and ProSiebenSat.1.

SVT includes five national channels and is expanding its online broadcasting presence. It has maintained a strong market position thanks to the receipt of substantial state subsidies: in 2008, SVT received US\$585 million (3.9 billion SEK) from the government. By way of comparison, the combined advertising revenues for commercial broadcasters stood at US\$750 million (5 billion SEK). However, in the long-term, commercial advertising revenues have been growing whereas the licensing fees, when adjusted for inflation, have generally stayed flat since the traditional public broadcasters are not adding many new households (and their US\$300.00 installation fees) to their audience shares. Subscription and distribution revenues for commercial channels have also been increasing rapidly over the last decade.

Public opinion favors the public broadcasters, but SVT has also had increasing difficulty in attracting a younger demographic, and its overall market shares are declining. It has also been under government scrutiny for using the licensing fees to compete on digital platforms with on-demand online TV and mobile services. Fortunately, the government recently approved these initiatives as a natural part of public service operations in a digital age, legally classifying public service as a type of content rather than a type of distribution.

SVT's lead has declined substantially since the 1990s, falling from 50% in 1996 to 30% in 2008 (of course, during the 1970s, that market share effectively stood at 100%). Much of this loss can be attributed to the entry into the market of ProSiebenSat.1 (Germany), which expanded its services to Sweden in 2007.³ The Swedish firms TV4 AB and MTG-Viasat Broadcasting have seen slower but continued growth for their market shares since 1996. TV4 AB, which has been broadcasting since 1990, is a subsidiary of Bonnier AB through Nordic Broadcasting Oy since 2007. MTG-Viasat is a satellite TV platform that operates in Sweden, Norway, Denmark, Finland, Estonia, Latvia, Lithuania, and Ukraine.⁴ Its parent, MTG, was initially established and owned by the major Swedish investment company Kinnevik, although it has been spun off in 1997 with share distribution to Kinnevik shareholders and now has a dual listing on the Stockholm Stock Exchange and the NASDAQ in the United States.

Because of the high penetration of cable TV and the decision to shut off analog broadcasting in favor of digital by 2008, distinctions between terrestrial, cable, and satellite channels have largely disappeared in Sweden.

The overall concentration of the broadcasting industry in Sweden remains high, though the C4 decreased from 92% in 1996 to 88% in 2004 due to SVT's decline in market share and the entrance of a number of smaller companies into the market. The HHI and Noam index both register a slow decline from 1996 on, indicating a gradual decrease in concentration in the industry as SVT has gradually lost its monopoly. The industry remains a relatively concentrated one, however, with HHI staying above 2,300 in 2008 and two entities—SVT and Bonnier's TV4 AB—controlling over half of the market shares (Table 13.7).

Table 13-7. TV Broadcasting (Market Shares by Revenue)

	1996	2000	2004	2008	2012 ⁵
Terrestrial Broadcasters					
SVT AB (public)	47.8	40.0	39.6	29.2	26.4
TV4 AB (Bonnier AB, Bonnier Family)	22.4	28.0	22.7	26.6	29.8
MTG—Viasat Broadcasting (Kinnevik) (both broadcaster and satellite)	15.0	16.4	17.1	23.6	21.8
ProSiebenSat.1 (Germany)				15.7	11.3
SBS Broadcasting	3.2	5.8	7.7		
Sveriges Utbildningsradio AB	4.5	3.4	3.0	2.3	
Lokal-TV Nätverket i Sverige AB			0.1		
MTV Networks AB (Viacom, US)		0.2	0.9	1.3	
Satellite-delivered Channels					
Nonstop Television AB			0.2	0.6	
Eurosport Television AB (France)		0.5	0.6	0.6	
Turner Broadcasting System Sweden (Time Warner, US)		0.1		0.1	
Axess Publishing					
C MORE ¹ (Telenor/TV 4 AB)	6.9	5.2	8.1		
Kunskaps-TV		0.5			
Others	0.2	0.0	0.0	0.0	10.7
Total Revenue (mil SEK)	7,200	8,947	10,250	13,550	
Total Revenue (mil US\$)	1,080	984	1,435	2,033	
C4	92.1	90.2	87.6	95.1	89.3
HHI	3,090	2,729	2,514	2,369	2,188
<i>N</i> (>1%)	6	6	6	6	4
Noam Index	1,261	863	1,026	967	1,094

1 Originally Canal+ Television AB, C More was originally established by Vivendi (France). After a series of sales, TV4 AB and Telenor (Norway) now jointly own it, with TV4 AB having a 65% stake and Telenor a 35% stake.

Multichannel TV Platforms

For multichannel platforms, by far the largest is the cable operator Com Hem, with 38.4 % of the market, followed by the semi-public telecom Telia (12.7%) and the public Canal Digital Sverige (13%) (Table 13.8). Market concentration dropped in the 1990s but rose again.

Table 13-8. Multichannel Video Platforms: Cable MSOS, DBS, IPTV (Market Shares by Revenue)

	1996	2000	2004	2008	2012
Com Hem (BC Partners, UK)			23.6	37.7	38.4
Canal Digital Sverige (public) (Telenor, Norway) ¹	6.8	11.3	15.7	12.5	13
Tele2 (Kinnevik)		5.4	3.0		6.6
UPC Sverige (Liberty Global, US)		9.7	9.7		
Telia (public)	23.0	19.5			12.7
StjärnTVnätet	9.3				
Sweden on Line (Alte)	4.6				
Teracom (public)	34.9	23.8	17.9	20.6	
MTG/Viasat (Kinnevik)	2.0	6.6	7.5	10.0	7.3
Boxer					13
Others	19.5	23.8	22.6	19.2	8.9
Total Revenue (mil SEK)	2,611	3,493	6,690	10,140	9,300
Total Revenue (mil US\$)	392	384	937	1,521	1,400
C4	73.9	64.2	67.0	80.8	77.1
HHI	1,904	1,238	1,284	2,101	2,071
<i>N</i> (>1%)	6	6	6	4	6
Noam Index	777	506	524	1,050	846

1 Originally a property of Vivendi's (France) Canal+, Canal Digital Sverige has since 2001 been part of Telenor (Norway). The Government of Norway has a 53% stake in the company.

p. 346 Video Channels

Satellite TV

The satellite TV market is led by three companies: Teracom, Telenor/Canal Digital Sverige, and MTG/Viasat. Teracom is the market leader, holding nearly half of the total market share in 2008 with 49.8% (though down since 1996, when the company dominated the market at 80%). These three companies together hold 100% of the entire cable TV market. Although the market shares have become more distributed among the three companies since 1996, Teracom still holds half of the total market share.

Teracom benefits greatly from being the Swedish government's terrestrial broadcast transmission service company: it owns all Swedish transmission sites and distributes all terrestrial radio and TV channels—private and public, analog (up until 2008) and digital. Its main product areas are pay TV, radio and television broadcasting, and data capacity services. Telenor, a state-owned Norwegian company, offers mobile and fixed telephony as well as Internet access and content (Table 13.9). ↵

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Table 13-9. DBS TV Programming (Market Shares by Revenue)

	1996	2000	2004	2008
Teracom (public)	80.0	62.3	46.0	49.8
Canal Digital Sverige (public) (Telenor, Norway)		20.4	34.7	26.1
Canal+/Canal Digital Sverige (Vivendi, France)	15.5			
MTG/Viasat (Kinnevik)	4.5	17.3	19.3	24.1
Others	0.0	0.0	0.0	0.0
Total Revenue (mil SEK)	1,471	2,161	4,090	5,940
Total Revenue (mil US\$)	221	238	573	891
C4	100	100	100	100
HHI	6,659	4,599	3,694	3,743
<i>N</i> (>1%)	3	3	3	3
Noam Index	3,845	2,655	2,133	2,161

p. 348 **Cable TV**

While shares were fairly evenly distributed among three or four companies between 1996 and 2004, shares are now very concentrated between only two (Com Hem and Canal Digital Sverige) as of 2008. Since 2008, Com Hem has dominated the cable TV market, holding a 90.9% market share. Canal Digital Sverige, formerly part of Vivendi (France) but now owned by Telenor (Norway), holds a 4.2% market share. Canal Digital Sverige began as a direct-broadcast satellite service in Sweden, Norway, Denmark, and Finland and has since developed into a cable TV operator in Norway, Sweden, and Denmark; a DTT provider in Finland; and an IPTV operator in Sweden and Denmark.

Com Hem is a private telecommunications firm that was founded in 1983. It was spun off of the former state-owned telecom provider Televerket, which has enabled it to retain its high market share even after privatization. Its low market can also partly be explained by the fact that it has been ranked “as the television brand with the least satisfied customers in Sweden” in 2007, 2008, and 2009, according to the Swedish Quality Index (Svensky Kvalitetsindex), an independent customer survey company.”⁶ Com Hem was owned by a series of private equity firms, including the Carlyle Group (UK), and in 2011 was acquired by BC Partners (UK), the chief owner of the IntelSat consortium.

The HHI has increased from 3,331 in 1996 to 8,285 in 2008, thus demonstrating an increase of almost 5,000 over the 22-year period; the high C4 is also indicative of the duopolistic nature of the market (Table 13.10).

Table 13-10. Cable TV Programming Channels (Market Shares by Revenue)

	1996	2000	2004	2008
Com Hem (BC Partners, UK)			60.7	90.9
Telenor/Canal Digital Sverige (public) (Telenor, Norway)		9.3	5.8	4.2
Tele2 (Kinnevik)		14.3	7.7	
UPC Sverige (Liberty Global, US)		25.3	25.0	
TeliaSonera (public)	52.6	51.1		
StjärnTVnätet	21.3			
Sweden on Line (Alte)	10.6			
Others	15.5	0.0	0.8	4.9
Total Revenue (mil SEK)	1,140	1,332	2,600	4,200
Total Revenue (mil US\$)	171	147	364	630
C4	84.5	100.0	99.3	95.1
HHI	3,331	3,546	4,409	8,285
<i>N</i> (>1%)	3	4	4	2
Noam Index	1,923	1,773	2,204	5,858

Film

Bonnier AB is again one of the major market shareholders, here in the film production and distribution industry, with a market share of 29.5%. Bonnier AB's two main competitors are Schibsted, with a market share of 13.9%, and MTG, with a market share of 10.5%. In 2008, the concentration indices for these three shareholders significantly decreased. In 2008, Bonnier AB went from almost 30% to 22.4%, losing around 8% of its market share. Similarly, Schibsted lost around 5%, bringing it down to a 7.7% market share. MTG's shares dipped down to 3.2%.

In 2004, HHI was 1,131 but fell in 2008 to 751. The leading US-based Hollywood majors have a relatively small share of the market (Table 13.11).

Table 13-11. Film Production/Distribution (Market Shares by Box Office %)

	2004	2008
Bonnier AB (Bonnier Family)	25.9	22.4
Egmont International (Denmark)	7.1	9.6
Schibsted	13.9	7.7
Bonver Videodata AB	5.2	4.9
MPP MediaTec Group		4.0
Sony (Japan/US)		3.7
De Agostino (Italy)		3.6
20th Century Fox (News Corp., Murdoch Family, US/UK/AUS)	4.1	3.2
Walt Disney Studios (US)	5.7	3.2
MTG (Kinnevik)	10.5	3.2
Universal Pictures Nordic (Comcast/GE, US)	4.5	
MTV Produktion (Bonnier AD, Bonnier Family)	2.2	
Kanal 75	2.3	
Warner Bros. Entertainment Sweden (Time Warner, US)	2.3	
Others	18.6	34.5
Total Revenue (mil SEK)	6,615	9,146
Total Revenue (mil US\$)	926	1,372
C4	57.5	44.7
HHI	1,131	751
<i>N</i> (>1%)	10	10
Noam Index	358	237

Telecommunications Media

Wireline Telecom

Sweden's telecommunications sector was state owned until the 1990s. As a result, several government initiatives have been put in place to support the growth of digital infrastructure, primarily to encourage operating efficiency and sustainable growth.

Expanding broadband infrastructure has been of particular concern, and since the 1990s, successive governments have financed the development of a cable network in remote and rural areas that are not considered economically profitable by commercial operators. The goal is to give every Swedish household the opportunity to receive high-speed Internet services (at a minimum rate of 1MB/s) by the end of 2013; in 2007, 71% of the households met that standard, in part thanks to a tax deduction granted to households that installed broadband between 2001 and 2007. Between 2001 and 2007, US\$570 million (3.8 billion SEK) was allocated to expanding high-speed Internet services.

Historically, Televerket had a *de facto* service monopoly over local, long-distance, and international communications (due to its vertical integration) before it became Telia, now the dominant part of TeliaSonera, in 1992.⁷ In 2005, ⁴ TeliaSonera, Tele2, and Telenor (Norway) controlled 94.6% of the wireline telecom market in Sweden. TeliaSonera dominated the Swedish market with an 80.6% market

share in 2005, and is government owned (the Swedish and Finnish governments have a 37% and 13% stake in it, respectively), although the company effectively operates as a private firm despite this. Although by far still the dominant player, by 2010 TeliaSonera's market share had fallen to 62.9% due to increased competition. Tele2 and Telenor (Norway) saw their shares in the market rise: Tele2 increased its share from 9.5% in 2005 to 11.8% in 2010, and Telenor (Norway) increased its share from 4.5% to 7.3% in the same period. However, the driving force reducing concentration in this sector is the growing market share of Com Hem. Com Hem occupied a mere 1.4% of the market in 2005, but by 2010 it commanded 7.5%. Other, smaller companies also made significant strides against TeliaSonera, increasing the collective market shares from 4.1% in 2005 to 10.5% in 2010. Significantly, the HHI dropped from 6,609 in 2005 to 4,205 in 2010 (Table 13.12).

Table 13-12. Wireline Telecom (Market Shares by Revenue), 2005–2010

	2005	2006	2007	2008	2009	2010
TeliaSonera (public)	80.6	74.3	70.2	67.9	65.3	62.9
Tele2 (Kinnevik)	9.5	10.9	11.6	12.4	12.4	11.8
Telenor (public) (Norway)	4.5	6.3	7.0	7.3	7.5	7.3
Com Hem (BC Partners, UK)	1.4	3.2	5.2	5.9	6.7	7.5
Others	4.1	5.3	5.9	6.5	8.1	10.5
Total Revenue (mil SEK) ¹	30,328			26,053		
Total Revenue (mil US\$)	3,931			3,908		
C4	96.0	94.7	94.0	93.5	91.9	89.5
HHI	6,609	5,689	5,139	4,852	4,519	4,205
N (>1%)	4	4	4	4	4	4
Noam Index	3,305	2,845	2,570	2,426	2,259	2,103

1 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Wireless Telecom

Sweden has been a leader in mobile communications since the proliferation of 1G technologies in the 1980s, a lead made possible by Nordic Mobile Telephony (NMT). NMT's open specifications minimized the cost of producing hardware and enabled many companies to enter the market.⁸ However, by 2010, just four companies (of which NMT was not one) dominated the Swedish wireless telecom market: TeliaSonera, Tele2, Telenor (Norway), and Hi3G. TeliaSonera has dominated the market since 2005, although its grip has slackened slightly, from 43.3% in 2005 to 40.4% in 2010. This is largely due to the entry of Hi3G, a privately owned mobile video communications company, into the market in 2001. Hi3G's share of the market jumped from 3.7% in 2005 to 9% in 2010. Hi3G's entrance has also precipitated losses for Tele2 and Telenor (Norway). Tele2, set up in the 1970s by the Kinnevik investment corporation, is a publicly traded telecommunications operator with services in Croatia, Estonia, France, Germany, Kazakhstan, Latvia, Lithuania, the Netherlands, Norway, Russia, and Sweden.

p. 351 The overall concentration of the market has remained high. C4 decreased by only 1% between 2005 and 2010, so new entrants were unable to gain any footholds. The firms that compete for the roughly 2% market share not controlled by the four main providers have made some small progress, having seen their 1% market share of 2005 more than double by 2010 (albeit only to 2.4% overall). The HHI's decline between 2005 and 2010 does suggest a trend of deconcentration in the wireless market, but the industry remains highly concentrated and growth has become static (Table 13.13).

Table 13-13. Wireless Telecom (Market Shares by Revenue)

	2005	2006	2007	2008	2009	2010
TeliaSonera (public)	43.3	43.8	43.3	42.4	41.1	40.4
Tele2 (Kinnevik)	33.8	32.3	31.8	31.8	32.0	31.6
Telenor (public) (Norway)	18.2	17.4	18.3	17.4	16.8	16.5
Hi3G	3.7	5.0	5.6	7.1	8.3	9.0
Others	1.0	1.5	0.9	1.3	1.9	2.4
Total Revenue (mil SEK) ¹	24,054			28,080		
Total Revenue (mil US\$)	3,127			4,212		
C4	99.0	98.5	99.0	98.7	98.2	97.5
HHI	3,362	3,289	3,252	3,162	3,064	2,984
<i>N</i> (>1%)	4	4	4	4	4	4
Noam Index	1,681	1,645	1,626	1,581	1,532	1,492

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Telenor (public) (Norway)	4.5	6.3	7.0	7.3	7.5	7.3
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Internet Media

Internet Service Providers (ISP)

The four main providers for Internet services in Sweden are the same market leaders in the telecom market: TeliaSonera, Tele2, Telenor (Norway), and Com Hem. And as in the telecom market, the entry of Hi3G has only slightly chipped away at these four players' dominant market shares; the company has gained a 9.5% market share as of 2010, actually surpassing Com Hem's (9.1%). Though the ISP market has begun to diversify, concentration remains relatively high (Table 13.14).

Table 13-14. Internet Service Providers (Market Shares by Revenue)

	2005	2006	2007	2008	2009	2010
TeliaSonera (public)	37.9	39.0	38.4	38.7	37.9	37.2
Tele2 (Kinnevik)	2.8	3.8	7.7	9.3	10.8	13.9
Telenor (public) (Norway)	29.5	27.3	22.6	20.3	21.5	19.9
Hi3G			2.3	4.9	6.8	9.5
Com Hem (BC Partners, UK)	16.2	16.2	15.2	13.4	11.3	9.1
Others	13.5	13.7	13.8	13.4	11.8	10.3
Total Revenue (mil SEK) ¹	7,892			9,340		
Total Revenue (mil US\$)	1,026			1,401		
C4	86.4	86.3	83.9	81.7	81.5	80.5
HHI	2,577	2,543	2,281	2,200	2,189	2,146
<i>N</i> (>1%)	4	4	5	5	5	5
Noam Index	1,289	1,272	1,020	984	979	960

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Conclusion

In Sweden, most media platforms have traditionally been highly concentrated, and in some cases a *de facto* monopoly has existed, notably in the case of the public radio broadcaster Sveriges Radio (SR) and of Televerket (now TeliaSonera), the telecom incumbent. Bonnier AB and TeliaSonera, the two largest Swedish media groups, are likely to retain their commanding places in multiple sectors of the media market. Kinnevik, a private major Swedish media company, has begun to provide a modicum of competition in the wake of Televerket's privatization.

In summation, Swedish media shows declining concentrations in TV broadcasting, book publishing, wireline telecom, film production and distribution, and ISPs. It shows rising concentrations for daily newspapers and magazines, and relatively sustained concentration indices for wireless telecom, satellite and cable TV, and radio broadcasting. Foreign penetration into the Swedish market remained small, and this lack of market penetration is likely to continue given the high entry barriers and small size of the media market compared to those in other EU member states like Germany, Spain, the United Kingdom, and France.

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Sweden—Data Summaries

Eli Noam and Paul Mutter

ALTHOUGH SWEDEN'S SMALL POPULATION limits the size of its media groups, the country's concentration indices are among the lowest internationally. Pooled overall sector HHI, for example, decreased from 1,406 in 2004 to 1,232 in 2008 (Table 13.15).

Table 13-15. National Media Industries Concentration in Sweden

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the Overall National Media Market (%)	Company Power Index in Country	Company Share of the Overall National Media Market (%)	Company Power Index in Country	Company Share of the Overall National Media Market (%)
TeliaSonera (public: 37% Sweden, 13% Finland)	2,141.6	32	1,256.5	25	-7	-1.2
Bonnier	262.5	10.1	488	13.8	14.31	0.6
Investment AB Kinnevik	288.5	12.2	374.7	16.4	5.0	0.7
Sveriges (public)	292.2	5.6	204	4.5	-5.0	-0.2
Com Hem (UK)	52.1	2.9	123.1	5	22.7	0.3
Telenor (Norway)	146	7.8	110.1	7.4	-4.1	-0.07
Schibsted (Norway)	40.1	2.7	18.2	1.8	-9.2	-0.2
Teracom (public)	19.5	1.1	30.6	1.5	9.4	0.1
ProSiebenSat.1 (Germany, US owned)	6.3	0.9	15.5	1.4	24	0.09
Egmont (Denmark)	9.0	0.9	10.2	1.0	2.3	0.005
Forma Publishing Group	3.2	0.5	6.5	0.9	17	0.06
Media Concentration Index			2004/5	2011 or Most Recent	% Change Annual Average	
Total Revenue: Nat'l Media Industry (mil US\$)			15,350	19,500	4.5	
Total Voices (<i>n</i>)			62	54	-2.2	
Net Voices (<i>n</i>)			38	30	-3.5	
Public Ownership (%)			18.6	15.2	-0.6	
Foreign Ownership (%)			20.4	21.4	0.2	
C4 Average—Weighted			82	86	0.6	
HHI Average—Weighted			3,389	2,881	-2.5	
C1 Average—Weighted			47.4	44	-0.01	
Noam Index Average—Weighted			675	1,120	11.0	
Pooled Overall Sector C4			62.0	62.6	0.09	
Pooled Overall Sector HHI			1,406	1,232	-2.1	
Pooled Overall Sector Noam Index			133	223	11.2	

Market Share of Top Ten Companies: Nat'l Media Industry (%) (Pooled C10)	80.0	83.5	0.6
National Power Index	3,351	2,887	-2.3

The public broadcaster Sveriges (SVT) is heavily subsidized, but it has been losing market share to commercial operators as they gained an easier licensing system for entry. SVT's market share fell from 40% in 2004 to 26%, with increases in market share for Bonnier, ProSiebenSat.1 (Germany/US), and Kinnevik. SVT now holds 9.7% of the content media market (Table 13.16).

Table 13-16. Top Content Media Companies in Sweden

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the National Content Media Market (%)	Company Power Index inCountry	Company Share of the National Content Media Market (%)	Company Power Index in Country	Company Share of the National Content Media Market (%)
Bonnier	607	23.3	1,052.3	30	12.2	1.1
Sveriges (Public)	676	13	440	9.7	-5.8	-0.5
Investment AB Kinnevik	73.4	5.9	248.3	13	40	1.2
Schibsted (Norway)	94.4	6.3	39.2	3.8	-9.7	-0.4
Com Hem (BC Partners, UK)	26.0	1.1	75.4	2.0	32	0.1
ProSiebenSat1 (Germany/US)	14.6	2	33.4	3.0	21.3	0.2
Teracom (public)	15	0.8	22	1.0	7.7	0.04

Media Concentration Index	2004/5	2011 or Most Recent	% Change Annual Average
Public Ownership (%)	13.9	11	-0.5
Foreign Ownership (%)	13.8	15.3	0.2
C4 Average—Weighted	67	80.2	2.2
HHI Average—Weighted	1,819	2,459	5.9
C1 Average—Weighted	33	39	0.01
National Power Index	1,731	2,427	6.7

Bonnier is the largest content media producer with a 30% share. It is an international print media group, active in Russia, Finland, the United States, and Israel, and also has investments in film production. In Sweden, Bonnier is large in TV broadcasting (29.8%) and magazines (32.9%).

The publicly owned TeliaSonera—also partly owned by the Government of Finland because it operates across both countries—is the largest company in Sweden by power index and share of the national market. It accounts for 45.9% of the platform market, well ahead of its nearest competitors, Telenor and Kinnevik. Kinnevik, which has holdings in six of the 13 industries surveyed, is the most diversified media group in the country, holding the second largest share of platform media (19.6%) and the third largest in content (13%).

p. 354 ComHem is by far the largest cable TV platform company with a huge market share and with telecom and ISP provision, too. It was acquired in 2011 by BC Partners, a private equity firm in London (Table 13.17). ↪

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Table 13-17. Top Platform Media Companies in Sweden

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the National Platform Media Market (%)	Company Power Index in Country	Company Share of the National Platform Media Market (%)	Company Power Index in Country	Company Share of the National Platform Media Market (%)
TeliaSonera (public: 37% Sweden, 13% Finland)	3,773.5	56.4	2,335.4	46	-6.4	-1.7
Investment AB Kinnevik	452.4	17	484	19.6	1.2	0.4
Telenor (Norway) (public)	248.4	13.2	198	13.2	-3.4	0.005
Com Hem (BC Partners, UK)	72	4.2	164.4	7.5	21.4	0.5

Media Concentration Index	2004/5	2011 or Most Recent	% Change Annual Average
Public Ownership (%)	22.1	19	-0.5
Foreign Ownership (%)	25.4	27.0	0.2
C4 Average—Weighted	93.9	90.4	-0.6
HHI Average—Weighted	4,585	3,246	-4.9
C1 Average—Weighted	58	48	-2
National Power Index	4,586	3,284	-4.73

p. 353 **Sweden—Data Summaries**

Eli Noam and Paul Mutter

ALTHOUGH SWEDEN'S SMALL POPULATION limits the size of its media groups, the country's concentration indices are among the lowest internationally. Pooled overall sector HHI, for example, decreased from 1,406 in 2004 to 1,232 in 2008 (Table 13.15).

Table 13-15. National Media Industries Concentration in Sweden

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the Overall National Media Market (%)	Company Power Index in Country	Company Share of the Overall National Media Market (%)	Company Power Index in Country	Company Share of the Overall National Media Market (%)
TeliaSonera (public: 37% Sweden, 13% Finland)	2,141.6	32	1,256.5	25	-7	-1.2
Bonnier	262.5	10.1	488	13.8	14.31	0.6
Investment AB Kinnevik	288.5	12.2	374.7	16.4	5.0	0.7
Sveriges (public)	292.2	5.6	204	4.5	-5.0	-0.2
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