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Consument & Markt



Telecom Monitor

Q2 2020

Report

This is the report of the Netherlands Authority for Consumers and Markets (ACM) with the market figures of the telecom sector.

Based on data from the most important market participants in the telecom industry, the Telecom Monitor gives an overview of the trends in mobile services, fixed telephony, broadband, television, business network services, and bundles. The largest market participants in the sector regularly provide ACM with information about their activities for the Telecom Monitor.

ACM verifies that data. In that way, ACM is able to keep track of the trends and developments in the various markets. The figures form a solid basis for ACM's three-year market analyses.

Table of contents

| | page |
|---------------------------------|------|
| Trends | 3 |
| Remarks and corrections | 4 |
| Mobile | 5 |
| Fixed telephony | 14 |
| Broadband | 24 |
| Business network services | 36 |
| Television | 42 |
| Bundles | 48 |
| Interviewed market participants | 53 |

Trends

Second quarter of 2020

Dutch call more during coronavirus crisis

In the second quarter of 2020, the coronavirus (COVID-19) crisis had noticeable effects on telephony and data consumption in the Netherlands. This is one of the conclusions of the Telecom Monitor that the Netherlands Authority for Consumers and Markets (ACM) published today. People in the Netherlands called more, both over mobile phones as well as over fixed phones. Data consumption increased less than usual, probably because many people were at home and used Wi-Fi instead of mobile data on-the-go.

The volume of mobile voice minutes increased by 23 percent in the first six months of 2020. With regard to fixed telephony, the volume of voice minutes increased by 19 percent in that same period. That is remarkable, because, prior to that, the volume of voice minutes actually decreased. Mobile-data consumption slightly increased, but considerably less than in previous quarters and years. Mobile-data consumption increased by 6 percent in the first six months of 2020. In total, Dutch consumed 219 billion MB of data. Compared with the first quarter of 2020 (214 billion MB), this is an increase of just 2.5 percent, whereas the increase over the same period in 2019 was a hefty 18 percent.

Broadband connections of households

In total, 7.45 million households have broadband connections. Of those households, 92 percent have a broadband connection of 30 Mbps (Megabit per second) or higher. Of all households, 47 percent have cable connections, 33 percent have copper connections, and 20 percent have fiber-optic connections.

Bundles of fixed and mobile services

More and more consumers take out bundles that combine mobile plans with fixed services, for example a combination of fixed services such as telephony, television, or internet with a mobile plan. In the first six months of 2020, the number of bundles that were taken out reached 7 million for the first time.

Machine-to-machine

Machine-to-machine (M2M) applications become more and more important. Think of cars or devices (such as smoke detectors, alarm systems, and smart energy meters) that exchange information, using an internet connection, with the digital systems of the operators of those devices. In the first six months of 2020, the number of M2M (machine-to-machine) connections increased by 40,000 to 7.1 million.

Market shares of mobile operators

The three largest providers in the Netherlands each have a market share of between 20 and 30 percent on the mobile-connections market. Based on mobile-data consumption, the market share of mobile operator T-Mobile (including Tele2) was nearly half of all data in the first quarter of 2020. KPN's market share was between 25 and 30 percent, and VodafoneZiggo's market share was between 15 and 20 percent. VodafoneZiggo is the largest provider on the broadband market with a market share of between 45 and 50 percent. Next comes KPN with a market share of between 40 and 45 percent. T-Mobile has a market share of between 5 and 10 percent, and Delta Fiber Nederland has a market share of less than 5 percent.

Remarks and corrections

(Dutch)

Algemeen

- De ACM rapporteert de cijfers van T-Mobile en Tele2 gezamenlijk onder de naam *T-Mobile*.
- Onder *DELTA Fiber Nederland* vallen de gegevens van Caiway, Delta, Cogas en CIF.

Mobiel - Retailaansluitingen (p. 5)

Er is in Q1 2020 door een partij een wijziging doorgevoerd in de wijze hoe mobiele aansluitingen worden gerapporteerd. Deze wijziging heeft ertoe geleid dat in Q1 en Q2 van 2020 het aantal MVNO aansluitingen met ongeveer 250.000 lager ligt. Voor het aantal data only abonnementen ligt het aantal aansluitingen in Q2 2020 300.000 hoger dan in Q1 2020.

Breedband - Homes passed glasvezelaansluitingen (p. 34)

In de *Telecommonitor rapportage Q1 2020* is onverhoopt een dubbeltelling geweest in de aantallen homes passed voor glasvezel. Dit is gecorrigeerd en is nu in lijn met eerdere rapportages.

Zakelijke netwerkdiensten - glasvezelaansluitingen (p. 36, p. 38)

Twee partijen hebben in Q1 2020 een datacorrectie doorgevoerd voor het aantal retail en wholesale zakelijke glasvezelaansluitingen. Dit heeft ertoe geleid dat voor retail zakelijke glasvezelaansluitingen de aantallen met ongeveer 1000 hoger liggen dan in Q4 2019. Voor wholesale zakelijke glasvezelaansluitingen zijn dat ongeveer 4000 aansluitingen meer.

Verder zijn er ten opzichte van de *Telecommonitor rapportage Q1 2020* nog enkele correcties doorgevoerd:

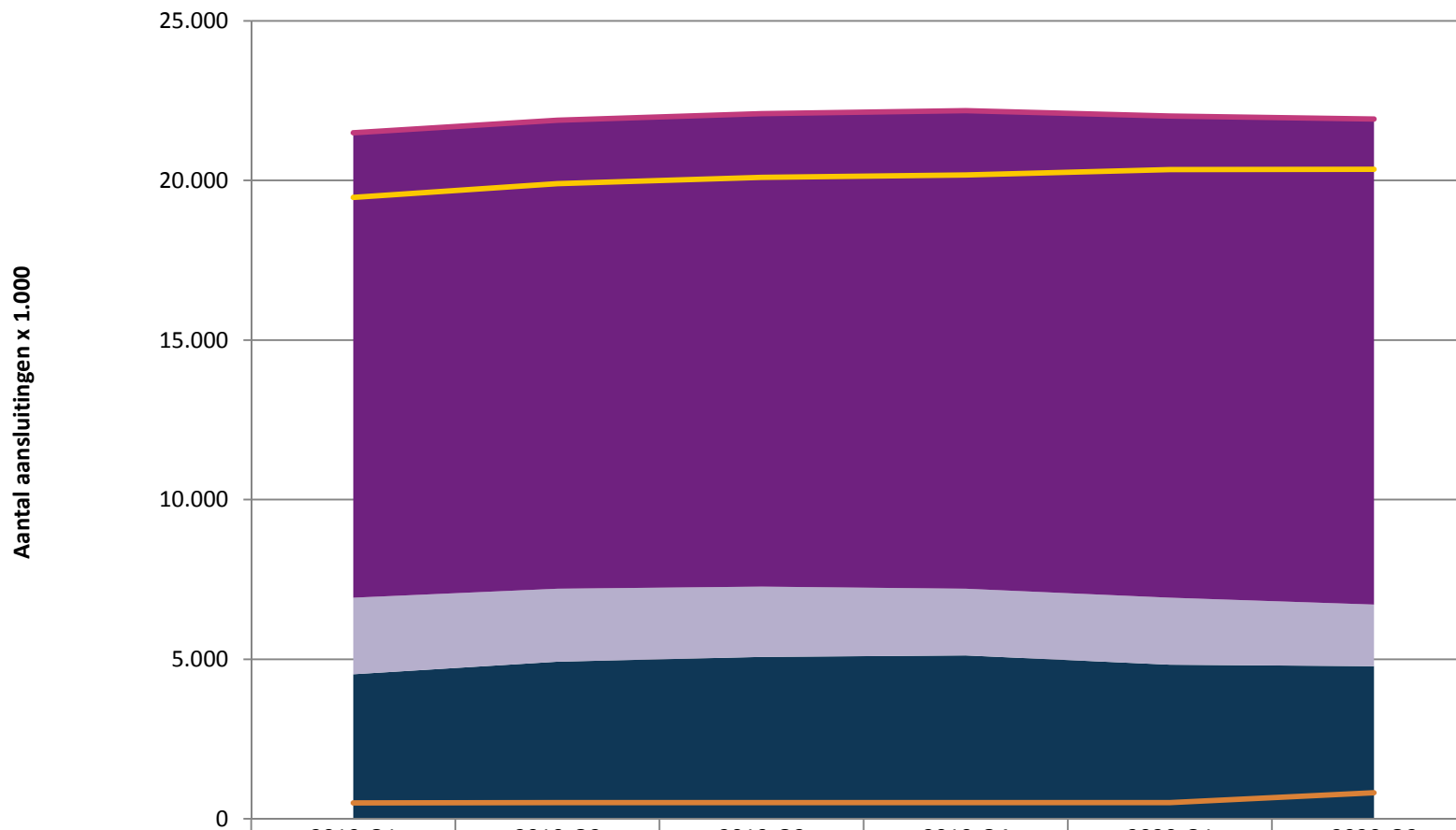
- Retail zakelijke glasaansluitingen: was 56.564, gecorrigeerd naar 55.971 (voor Q1 2020, p. 36)
- Wholesale zakelijke glasaansluitingen: was 105.270, gecorrigeerd naar 104.441 (voor Q1 2020, p. 38)

Televisie - Homes passed kabel (p. 47)

De aantallen homes passed voor kabel zijn met terugwerkende kracht gecorrigeerd. Het betreft een correctie van +/- 117.000 aansluitingen t.o.v. eerdere rapportages en geldt voor alle kwartalen.

Mobile

Retail connections

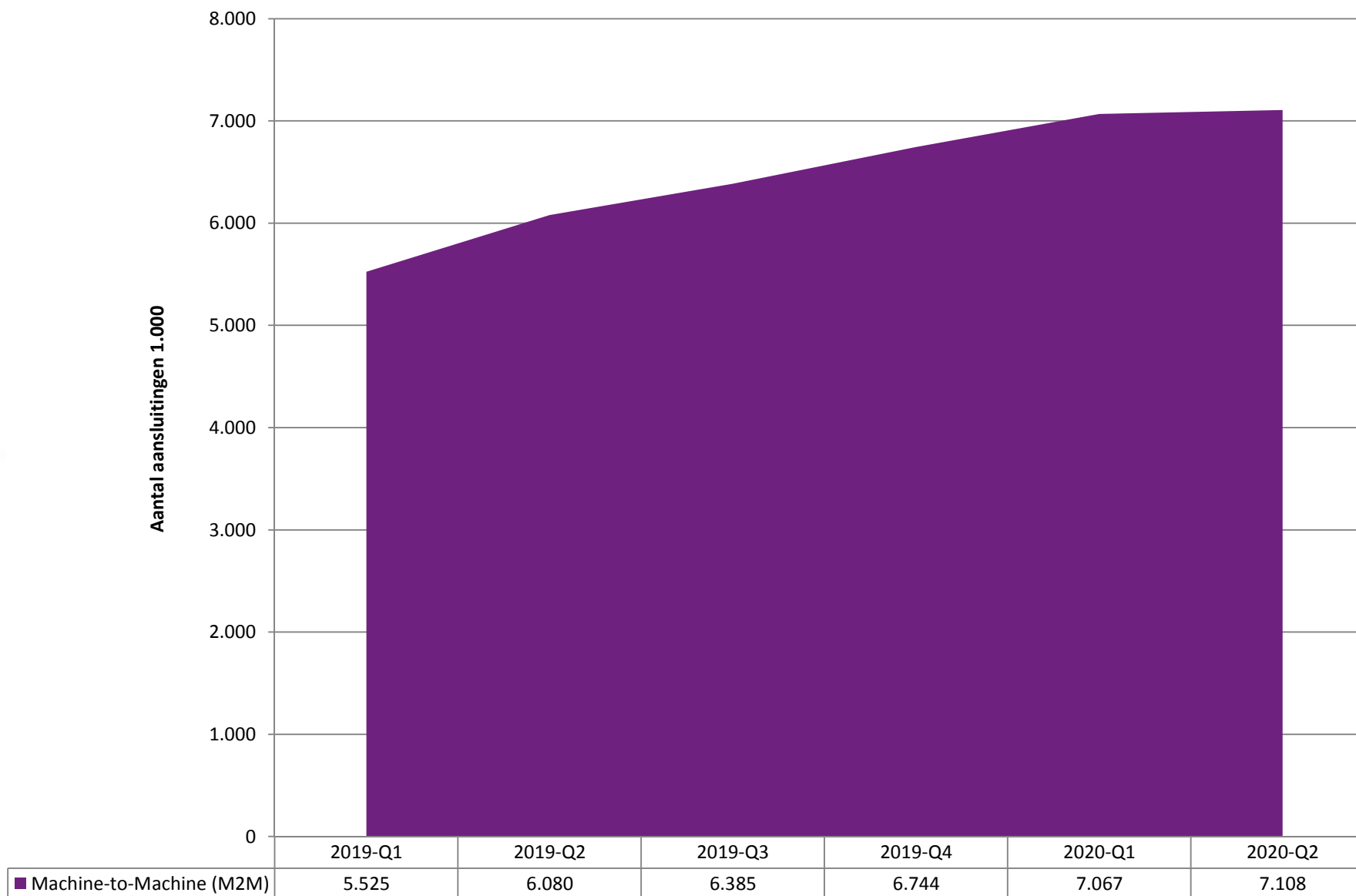


| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|------------------------------------|---------|---------|---------|---------|---------|---------|
| Postpaid MNO | 14.568 | 14.671 | 14.818 | 14.975 | 15.097 | 15.206 |
| Prepaid MNO | 2.398 | 2.288 | 2.205 | 2.093 | 2.095 | 1.932 |
| Postpaid and prepaid MVNO | 4.526 | 4.922 | 5.068 | 5.115 | 4.828 | 4.780 |
| Total mobile connections | 21.492 | 21.881 | 22.091 | 22.182 | 22.020 | 21.917 |
| Of which bundled (data and speech) | 19.468 | 19.900 | 20.093 | 20.170 | 20.333 | 20.343 |
| Of which data only connections | 503 | 504 | 509 | 505 | 512 | 821 |

Op basis van vragen 10_A1_1_1-2-3-4, 10_A1_2_1-2-3-4, 10_A1_3_1-2-3-4, 10_A1_4_1 en 10_B3_1_1-2-3 van de Telecommonitor

Mobile

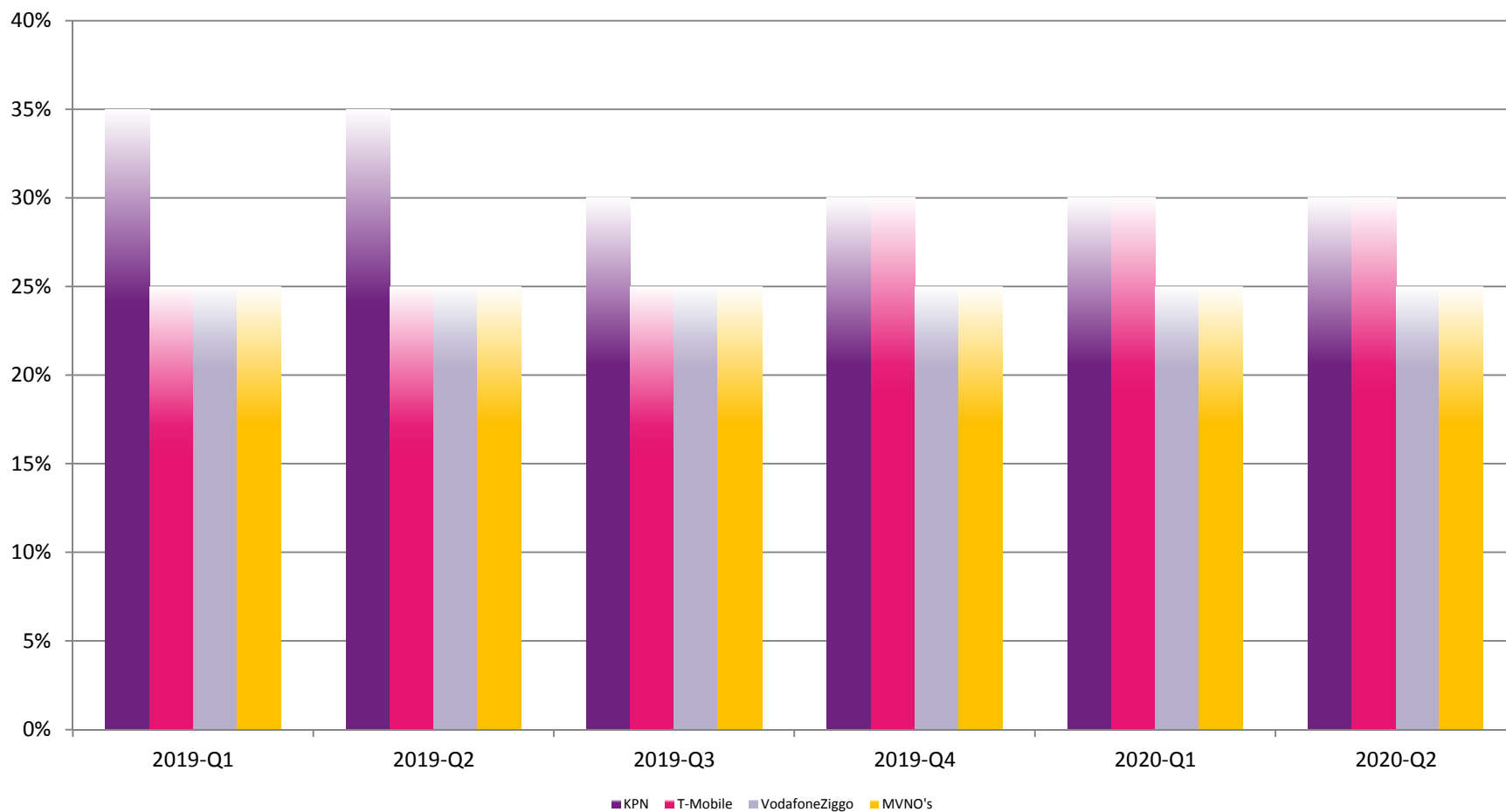
Machine-to-Machine connections



Op basis van vragen 10_A1_1_1-2-3-4, 10_A1_2_1-2-3-4, 10_A1_3_1-2-3-4, 10_A1_4_1 en 10_B3_1_1-2-3 van de Telecommonitor

Mobile

Retail market share based on connections

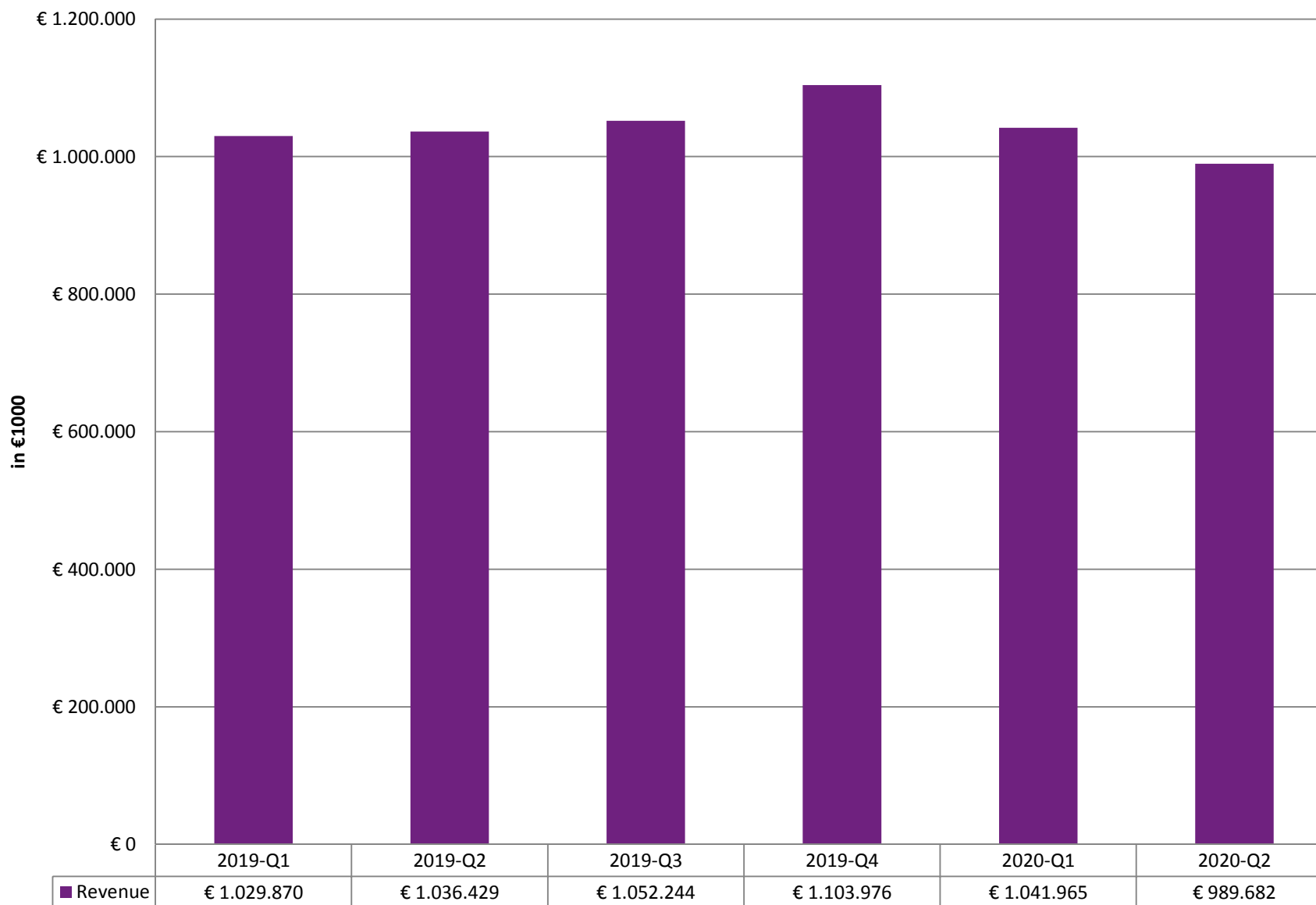


| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|---------------|------------|------------|------------|------------|------------|------------|
| KPN | [30 - 35%] | [30 - 35%] | [25 - 30%] | [25 - 30%] | [25 - 30%] | [25 - 30%] |
| VodafoneZiggo | [20 - 25%] | [20 - 25%] | [20 - 25%] | [20 - 25%] | [20 - 25%] | [20 - 25%] |
| T-Mobile | [20 - 25%] | [20 - 25%] | [20 - 25%] | [25 - 30%] | [25 - 30%] | [25 - 30%] |
| MVNO's | [20 - 25%] | [20 - 25%] | [20 - 25%] | [20 - 25%] | [20 - 25%] | [20 - 25%] |

Op basis van vragen 10_A1_1_1-4, 10_A1_2_1-4, 10_A1_3_1-3, en 10_B3_1_1-3 van de Telecommonitor

Mobile

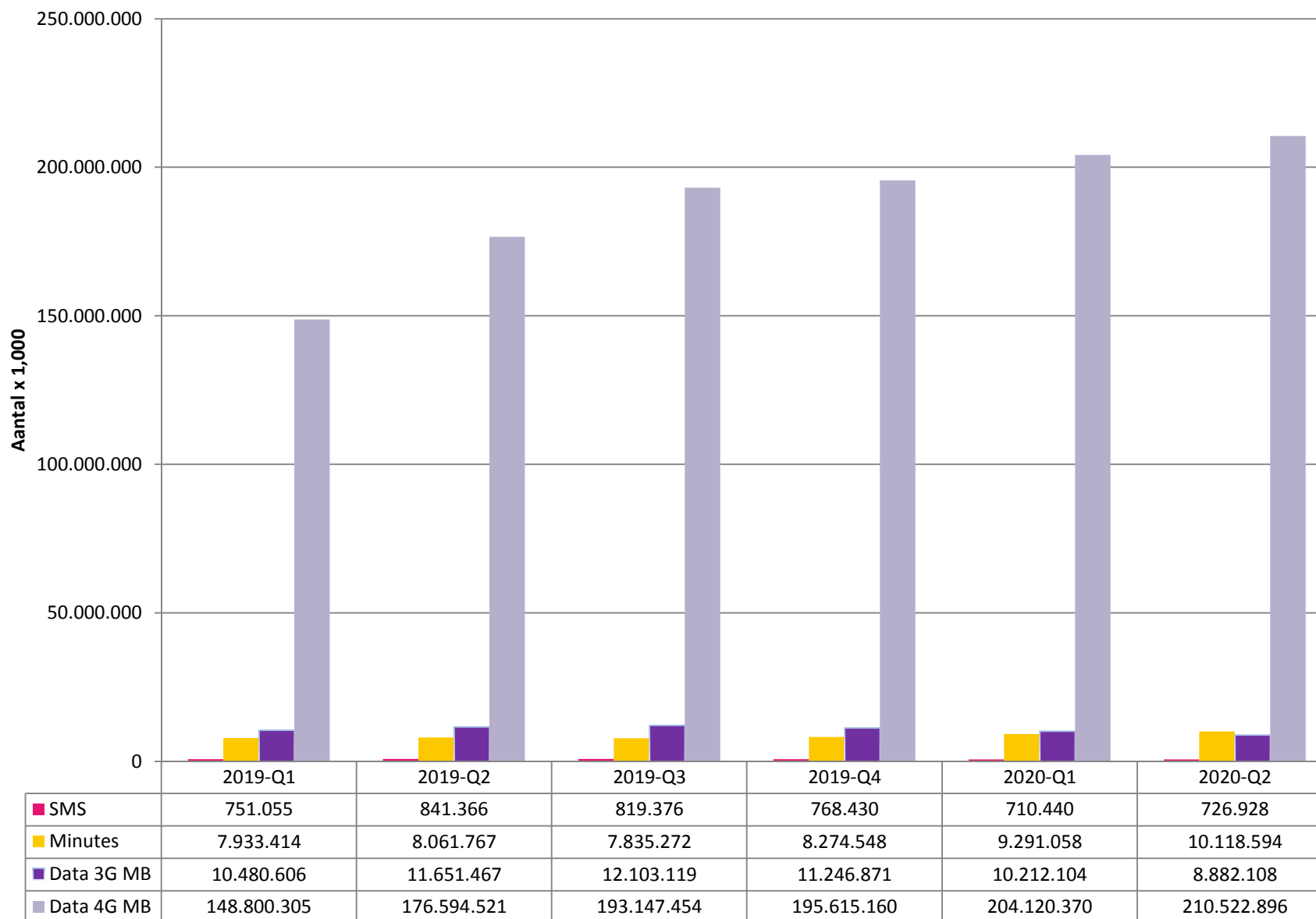
Retail revenue of Mobile Network Operators (MNOs)



Op basis van vragen 10_A2_1-2-3-4, 10_A2_2-2-3-4, 10_A2_3-2-3-4, en 10_A2_4-2-3 van de Telecommonitor

Mobile

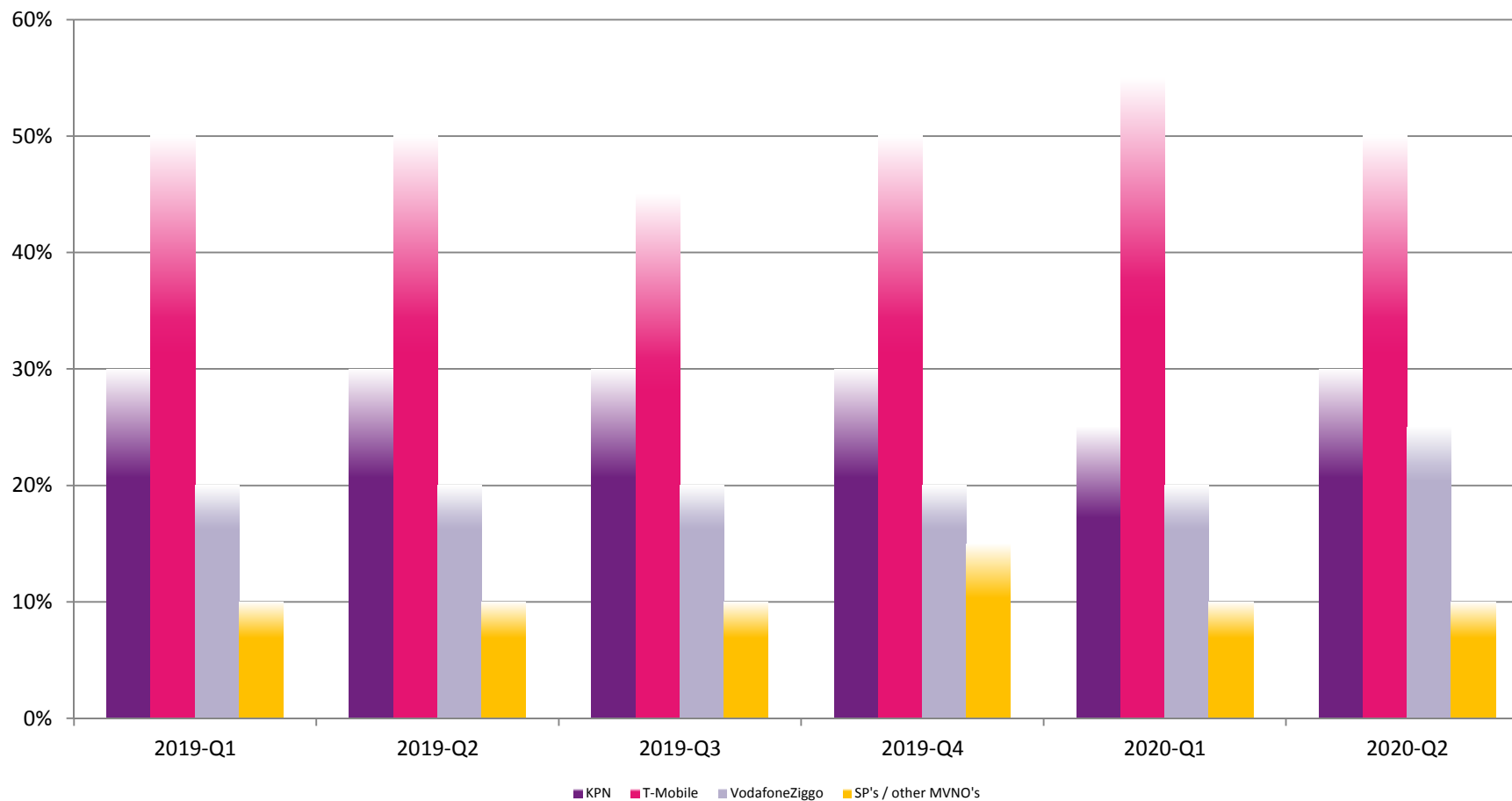
Retail volume of voice minutes, data and SMS/text



Op basis van vragen 10_A3_1_1-2-3, 10_A3_2_1-2-3, 10_A3_3_1-2-3, 10_A3_4_1-2-3, en 10_B3_1_1-2-3 van de Telecommonitor

Mobile

Retail market share based on data consumption

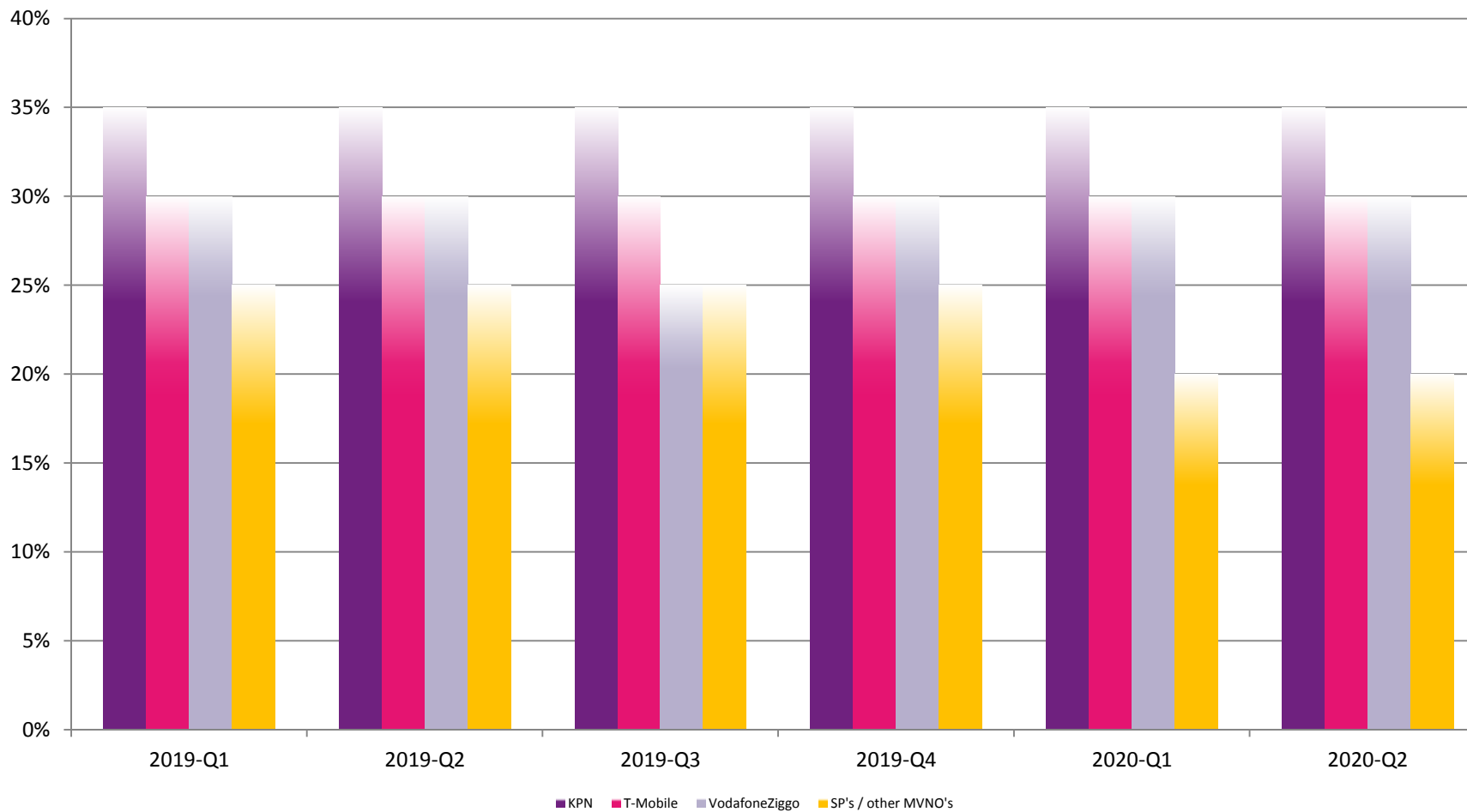


| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|---------------------|------------|------------|------------|------------|------------|------------|
| KPN | [25 - 30%] | [25 - 30%] | [25 - 30%] | [25 - 30%] | [20 - 25%] | [25 - 30%] |
| VodafoneZiggo | [15 - 20%] | [15 - 20%] | [15 - 20%] | [15 - 20%] | [15 - 20%] | [20 - 25%] |
| T-Mobile | [45 - 50%] | [45 - 50%] | [40 - 45%] | [45 - 50%] | [50 - 55%] | [45 - 50%] |
| SP's / other MVNO's | [5 - 10%] | [5 - 10%] | [5 - 10%] | [10 - 15%] | [5 - 10%] | [5 - 10%] |

Op basis van vragen 10_A3_1_3, 10_A3_2_3, 10_A3_3_3, 10_A3_4_2, en 10_B3_1_3 van de Telecommonitor

Mobile

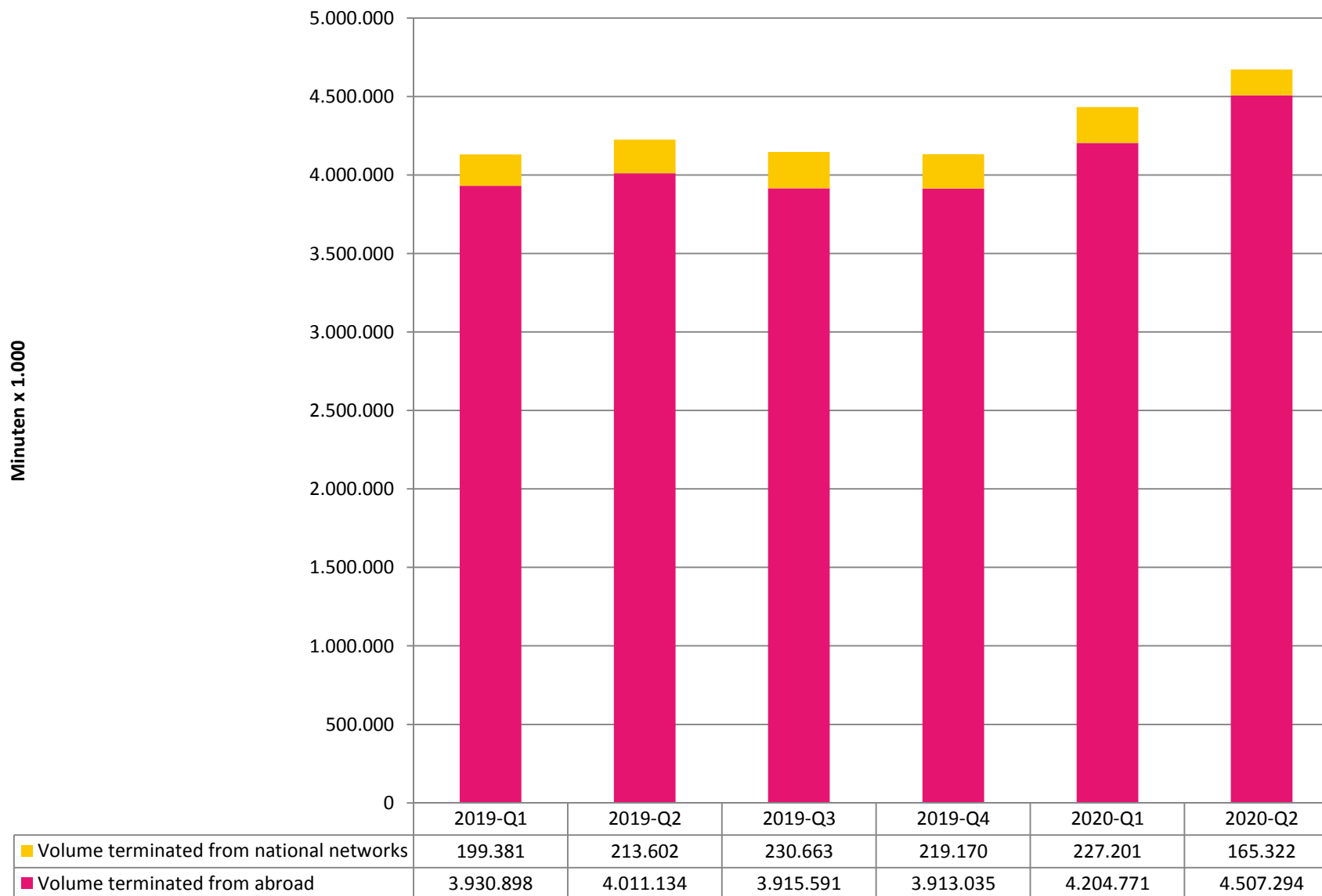
Retail market share based on consumed voice minutes



| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|---------------------|------------|------------|------------|------------|------------|------------|
| KPN | [30 - 35%] | [30 - 35%] | [30 - 35%] | [30 - 35%] | [30 - 35%] | [30 - 35%] |
| VodafoneZiggo | [25 - 30%] | [25 - 30%] | [20 - 25%] | [25 - 30%] | [25 - 30%] | [25 - 30%] |
| T-Mobile | [25 - 30%] | [25 - 30%] | [25 - 30%] | [25 - 30%] | [25 - 30%] | [25 - 30%] |
| SP's / other MVNO's | [20 - 25%] | [20 - 25%] | [20 - 25%] | [20 - 25%] | [15 - 20%] | [15 - 20%] |

Mobile

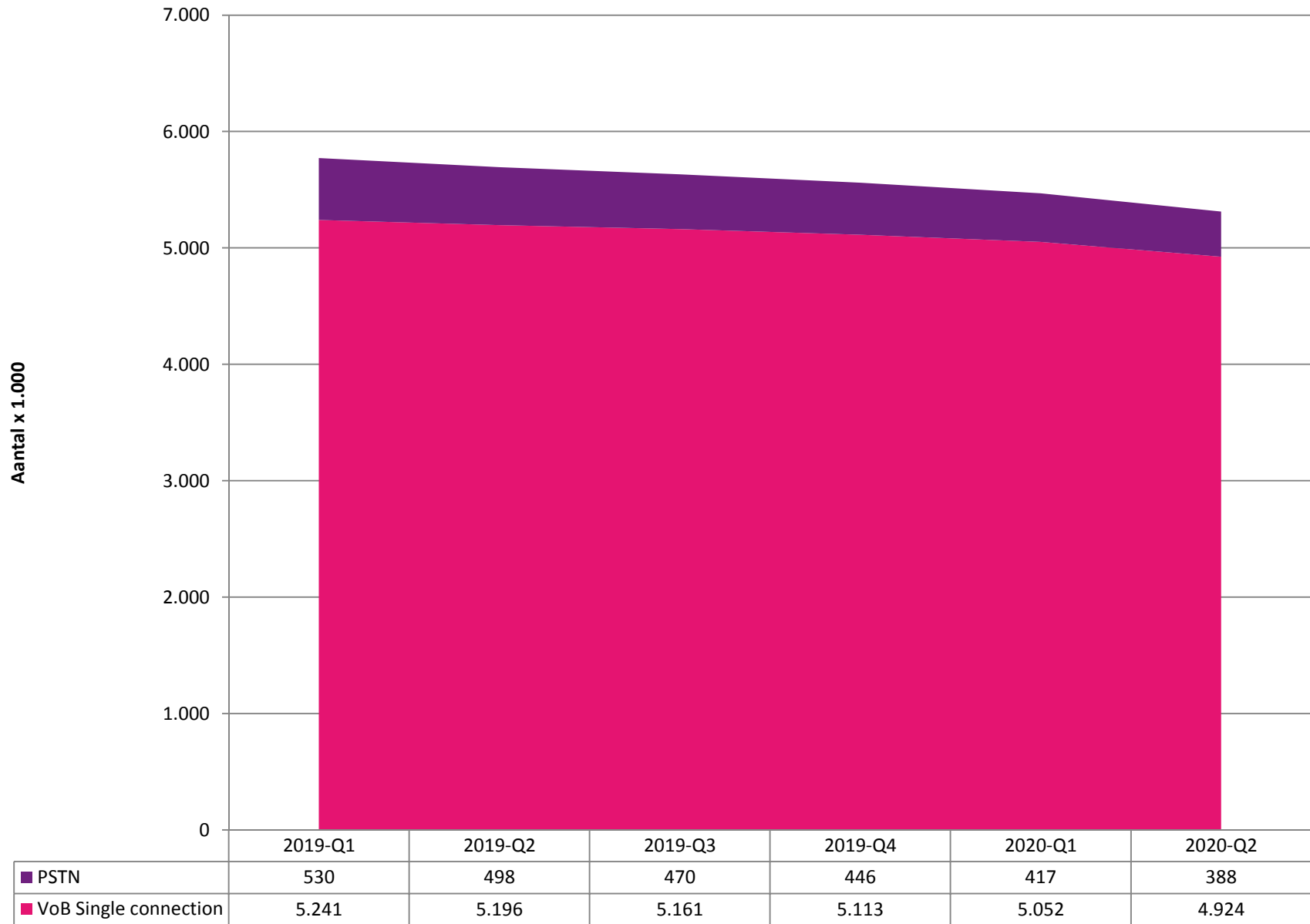
Wholesale volume of call termination (excluding onnet)



Op basis van vragen 10_C2_1_1-2-3-4-5 van de Telecommonitor

Fixed telephony

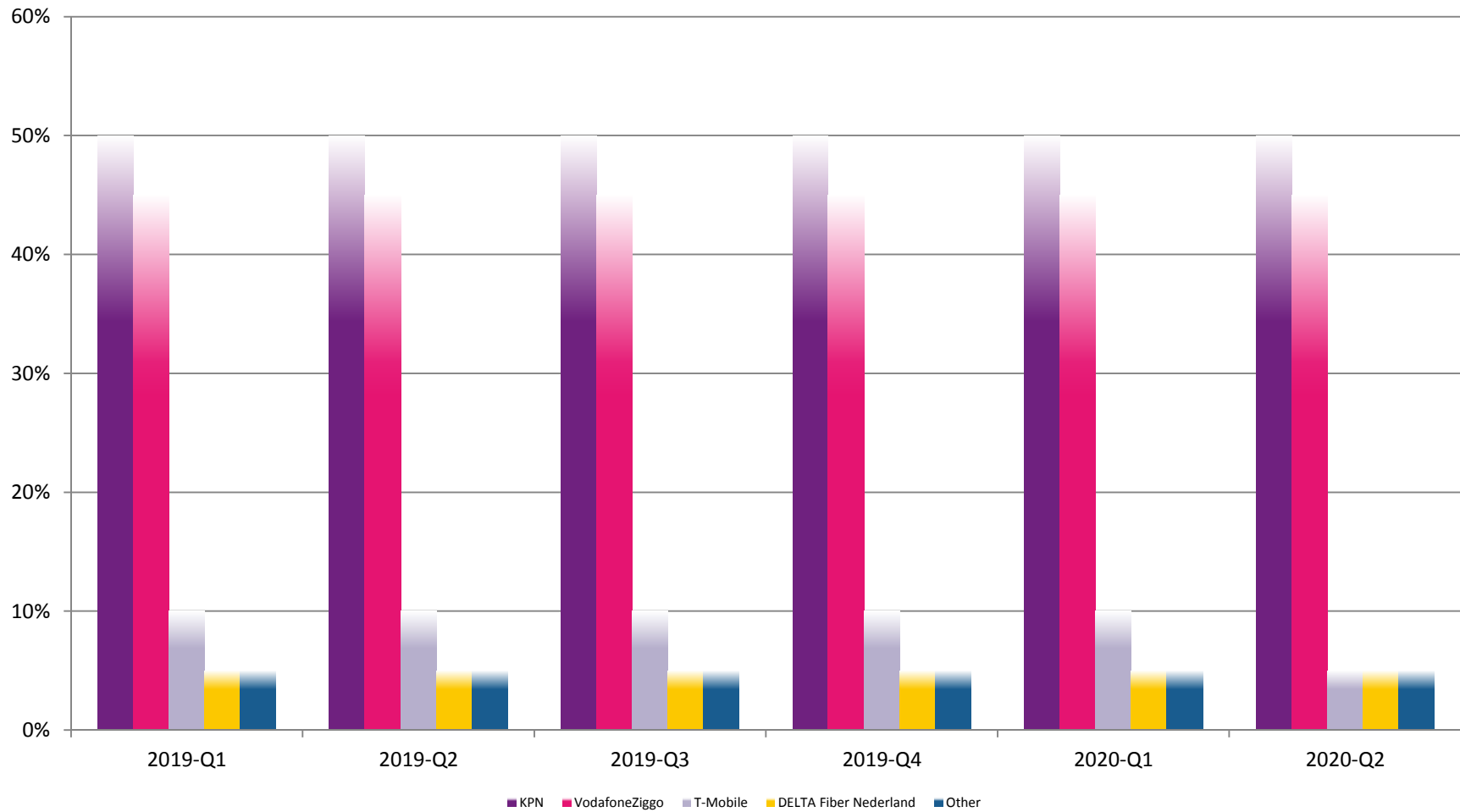
Retail single connections



Op basis van vragen 20_A1_1_1-2-3-4-5-6 en 20_A1_7_1-2-3-4-5 van de Telecommonitor

Fixed telephony

Retail market share based on single connections



| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|-----------------------|------------|------------|------------|------------|------------|------------|
| KPN | [45 - 50%] | [45 - 50%] | [45 - 50%] | [45 - 50%] | [45 - 50%] | [45 - 50%] |
| VodafoneZiggo | [40 - 45%] | [40 - 45%] | [40 - 45%] | [40 - 45%] | [40 - 45%] | [40 - 45%] |
| T-Mobile | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] | [0 - 5%] |
| DELTA Fiber Nederland | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] |
| Other | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] |

Op basis van vragen 20_A1_1_1-2-3-4-5-6 en 20_A1_7_1-2-3-4-5 van de Telecommonitor

Fixed telephony

Retail churn of single connections



Op basis van vragen 20_A2_1_1-2 en 20_A2_7_1-2 van de Telecommonitor

Fixed telephony

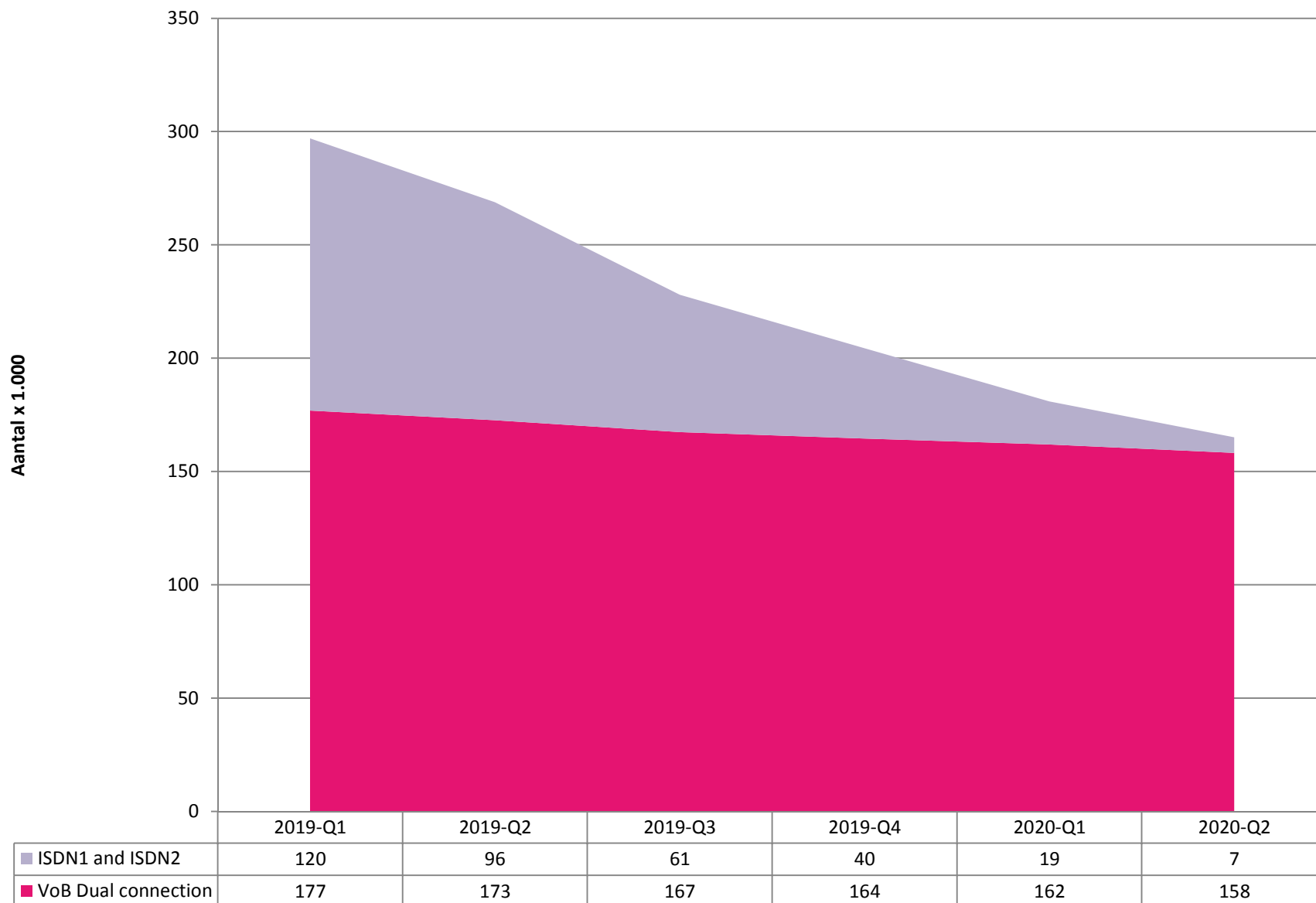
Retail turnover PSTN and VoB



Op basis van vragen 20_A3_1_1, 20_A3_1_2, 20_A3_7_1, en 20_A3_7_2 van de Telecommonitor

Fixed telephony

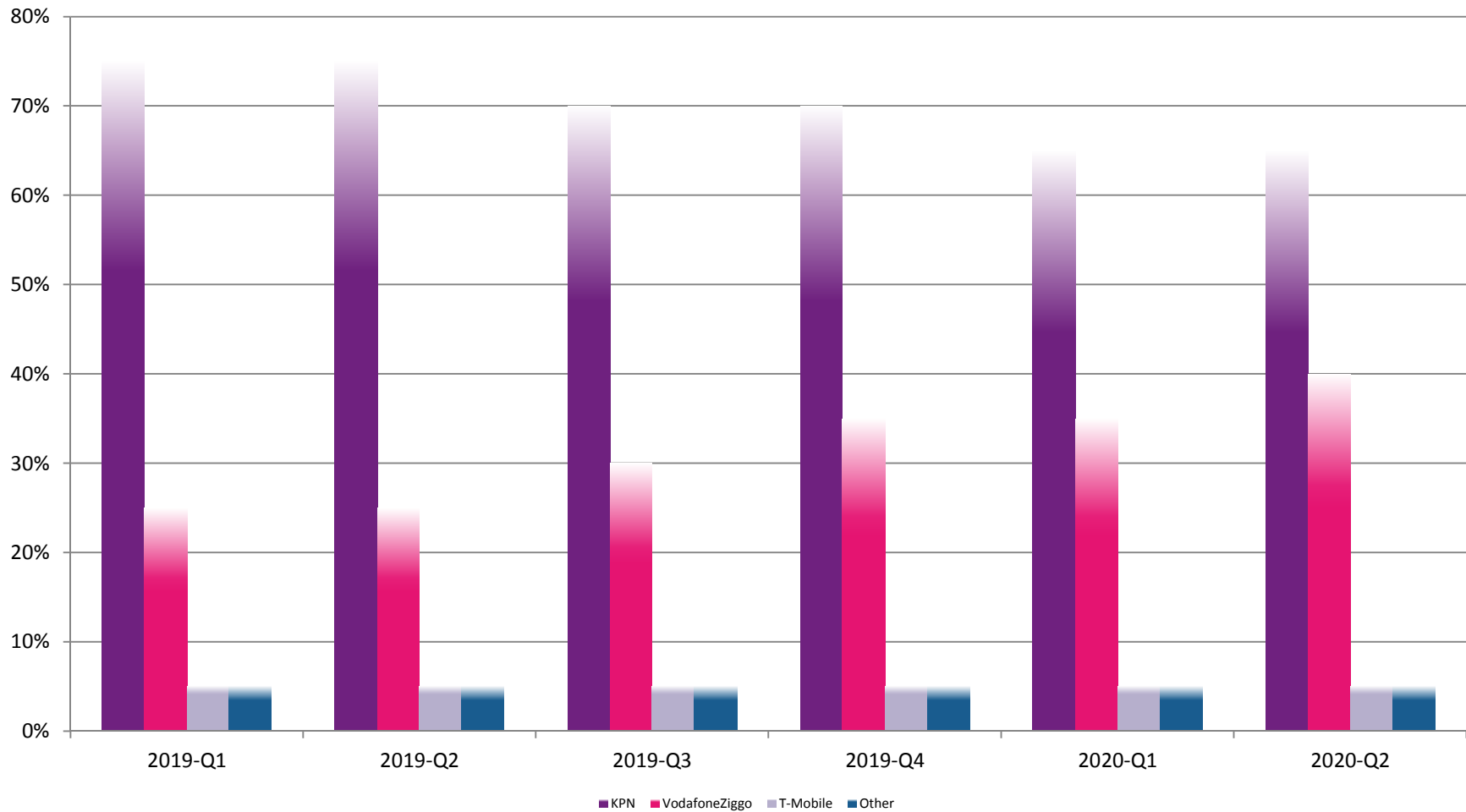
Retail dual connections



Op basis van vragen 20_A1_2_1-2-3-4-5-6, 20_A1_3_1-2-3-4-5-6, en 20_A1_8_1-2-3-4-5 van de Telecommonitor

Fixed telephony

Retail market share based on dual connections

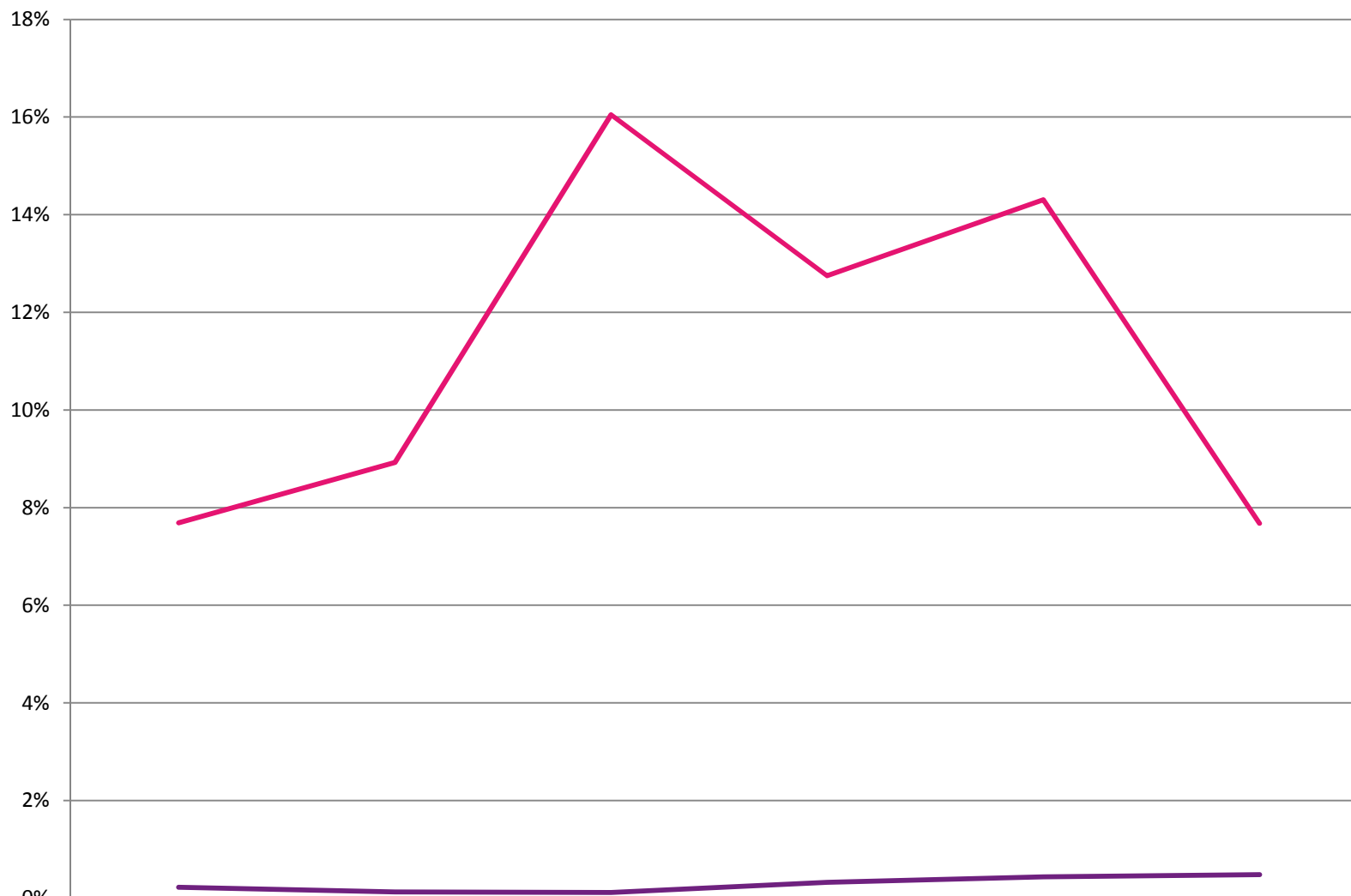


| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|---------------|------------|------------|------------|------------|------------|------------|
| KPN | [70 - 75%] | [70 - 75%] | [65 - 70%] | [65 - 70%] | [60 - 65%] | [60 - 65%] |
| VodafoneZiggo | [20 - 25%] | [20 - 25%] | [25 - 30%] | [30 - 35%] | [30 - 35%] | [35 - 40%] |
| T-Mobile | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] |
| Other | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] |

Op basis van vragen 20_A1_2_1-2-3-4-5-6, 20_A1_3_1-2-3-4-5-6, en 20_A1_8_1-2-3-4-5 van de Telecommonitor

Fixed telephony

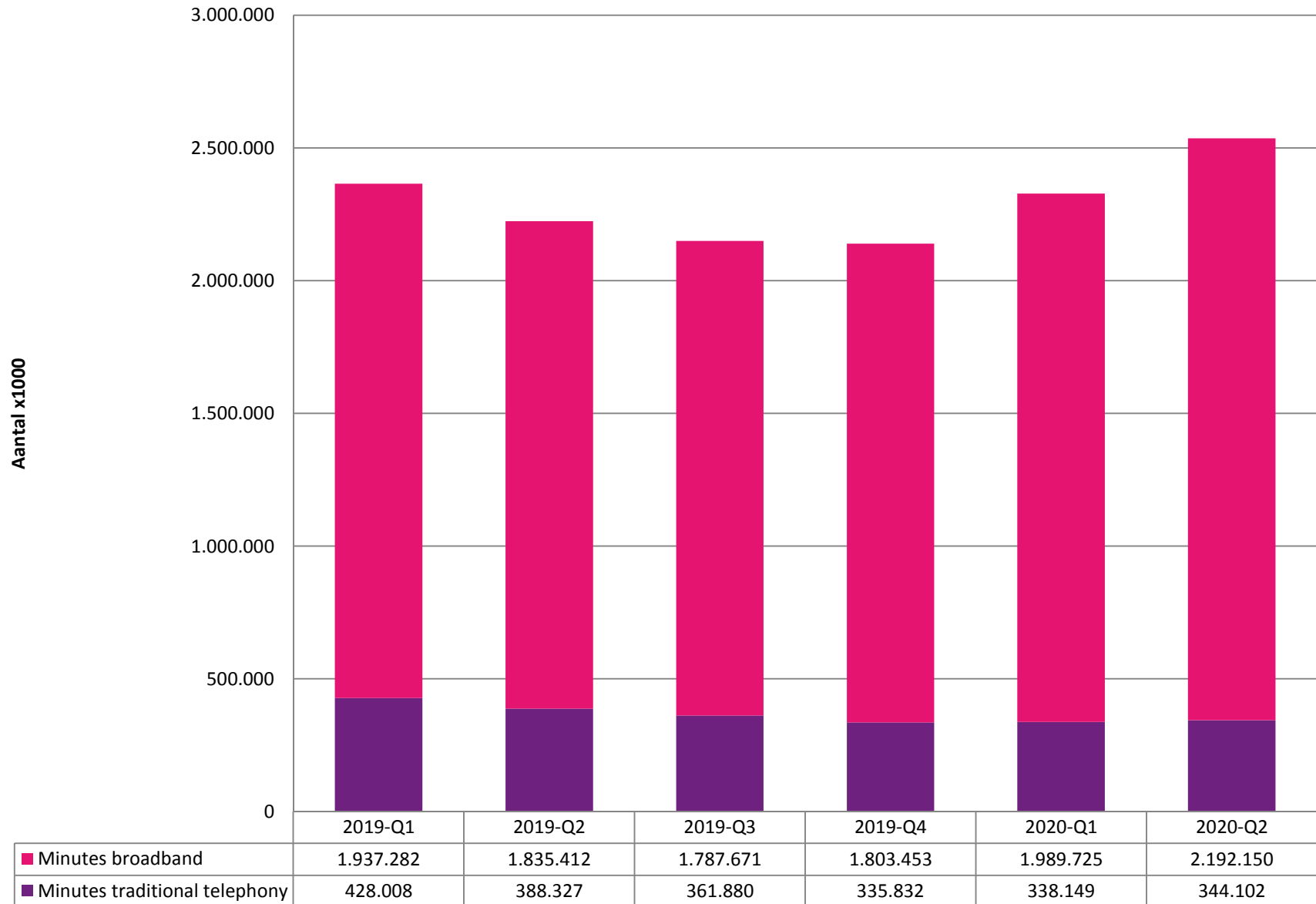
Retail churn of dual connections



Op basis van vragen 20_A2_2_1-2, 20_A2_3_1-2 en 20_A2_8_1-2 van de Telecommonitor

Fixed telephony

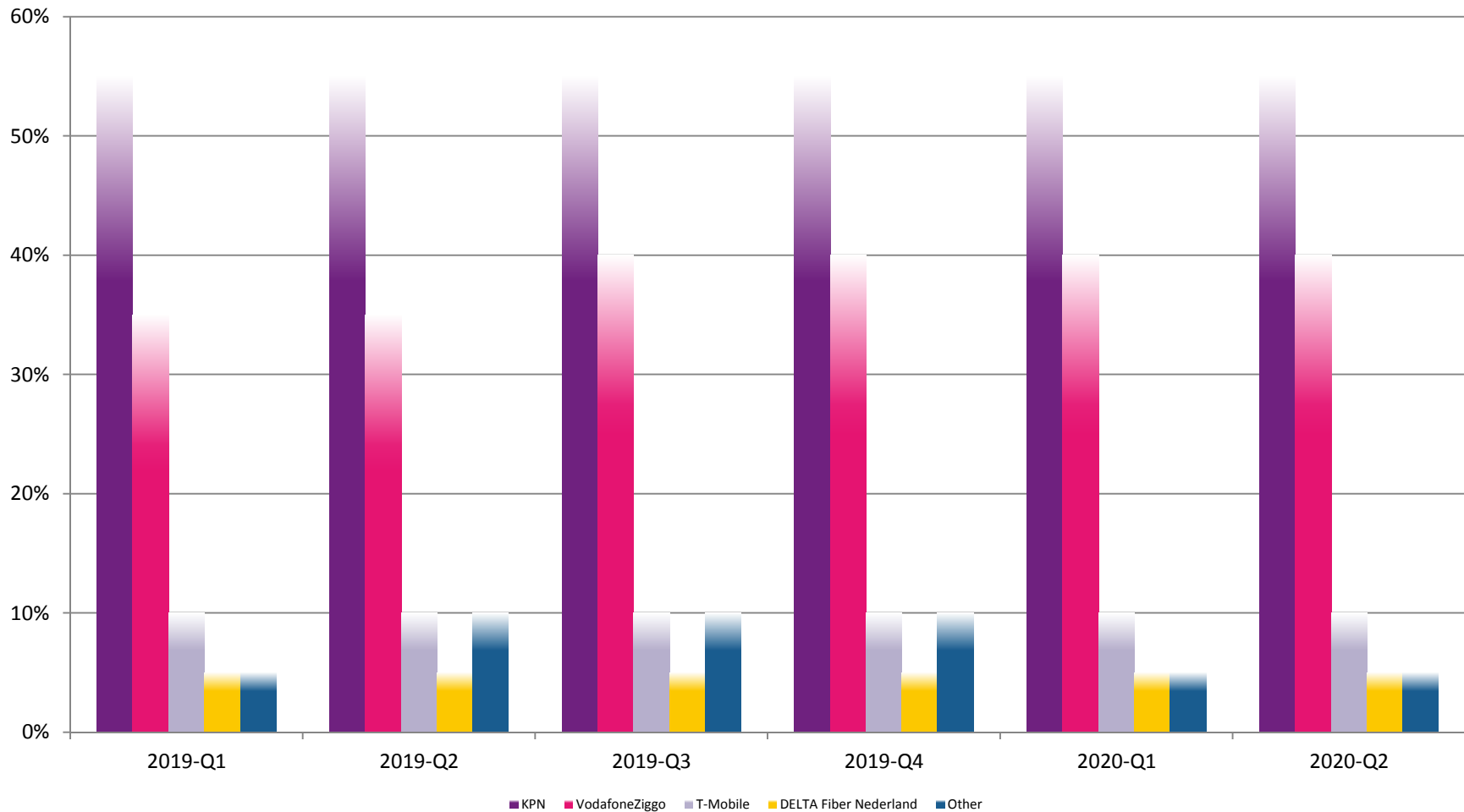
Retail volume based on voice minutes



Op basis van vragen 20_A4_2_1-2-3-4 van de Telecommonitor

Fixed telephony

Retail market share based on voice minutes

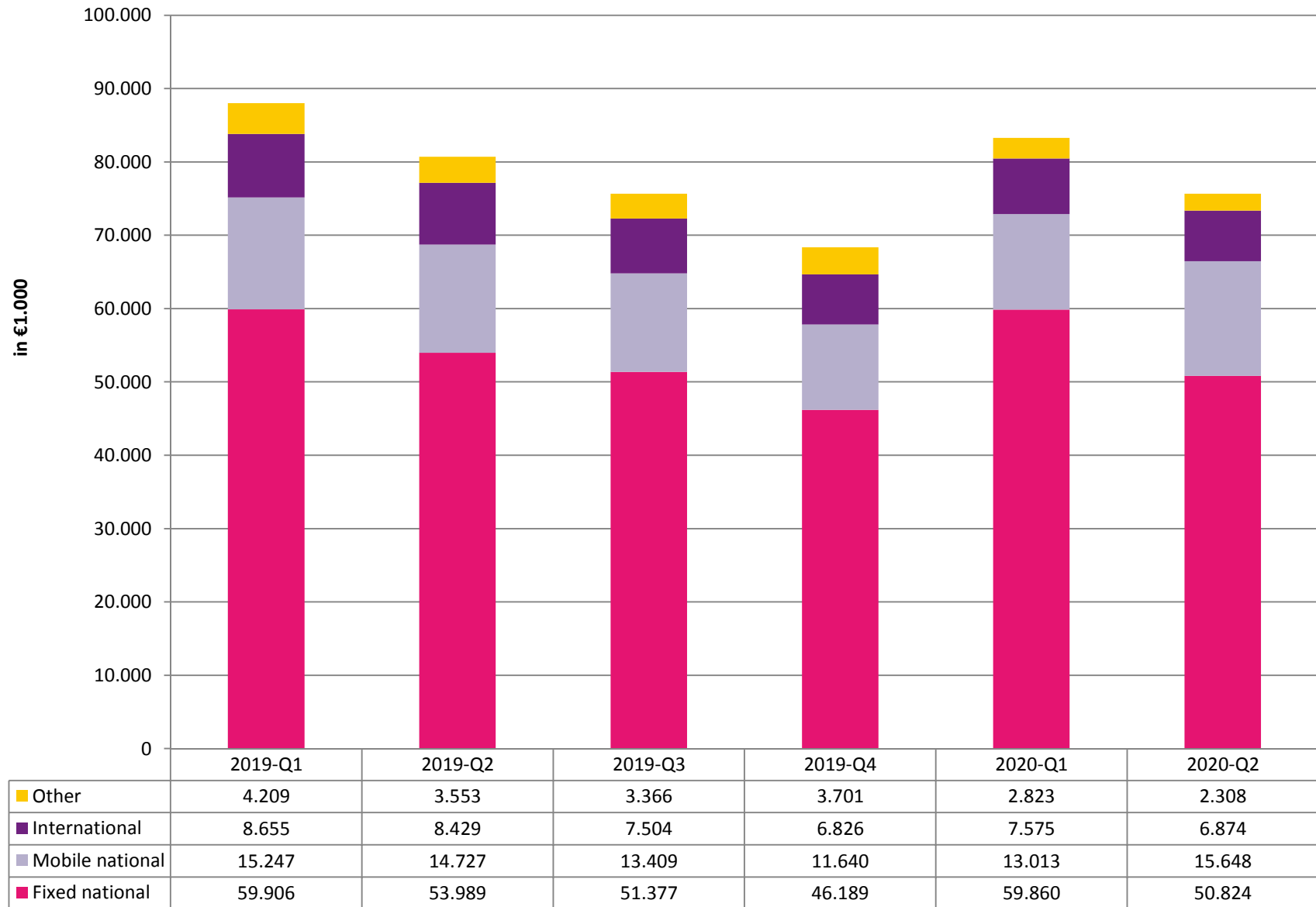


| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|-----------------------|------------|------------|------------|------------|------------|------------|
| KPN | [50 - 55%] | [50 - 55%] | [50 - 55%] | [50 - 55%] | [50 - 55%] | [50 - 55%] |
| VodafoneZiggo | [30 - 35%] | [30 - 35%] | [35 - 40%] | [35 - 40%] | [35 - 40%] | [35 - 40%] |
| T-Mobile | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] |
| DELTA Fiber Nederland | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] |
| Other | [0 - 5%] | [5 - 10%] | [5 - 10%] | [5 - 10%] | [0 - 5%] | [0 - 5%] |

Op basis van vragen 20_A4_2_1-2-3-4 van de Telecommonitor

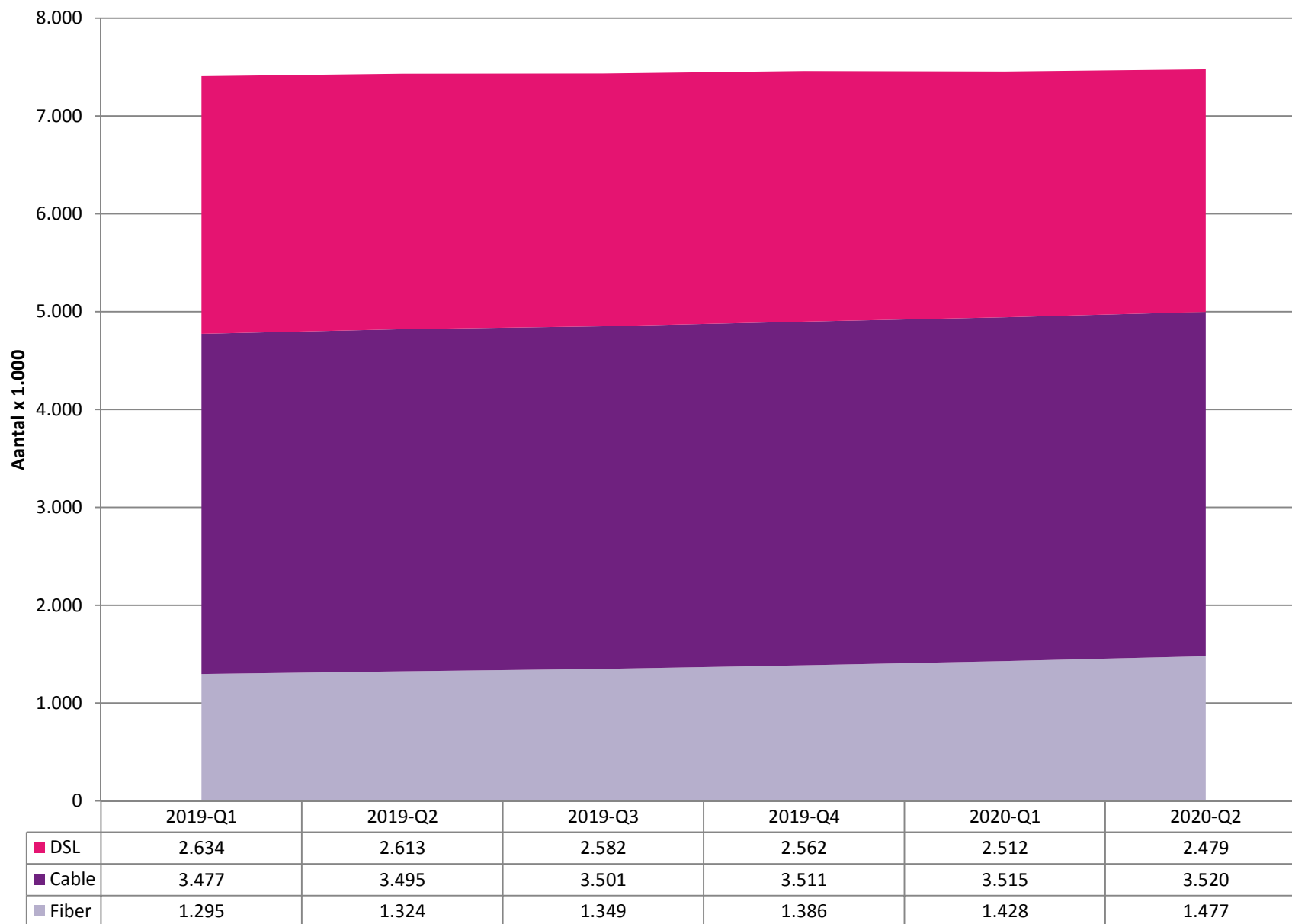
Fixed telephony

Retail turnover per type of traffic



Broadband

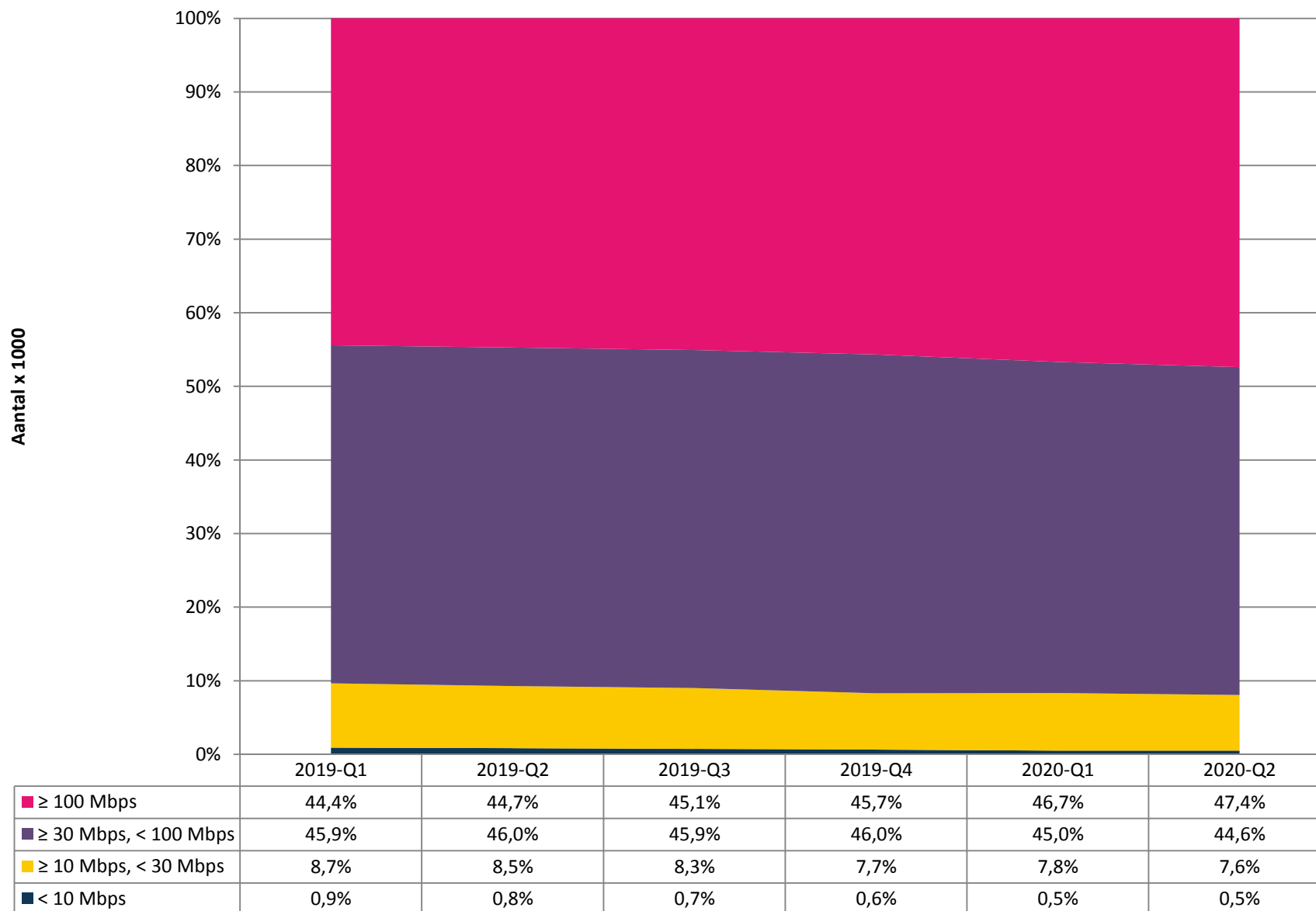
Retail connections per type



Op basis van vragen 30_A1_1_1-2-3-4-5, 30_A1_2_1-2-3-4-5, 30_A1_3_1-2-3-4-5, 30_A1_4_1-2-3-4-5, 30_A1_5_1-2-3-4-5, en 30_A1_6_1 van de Telecommonitor

Broadband

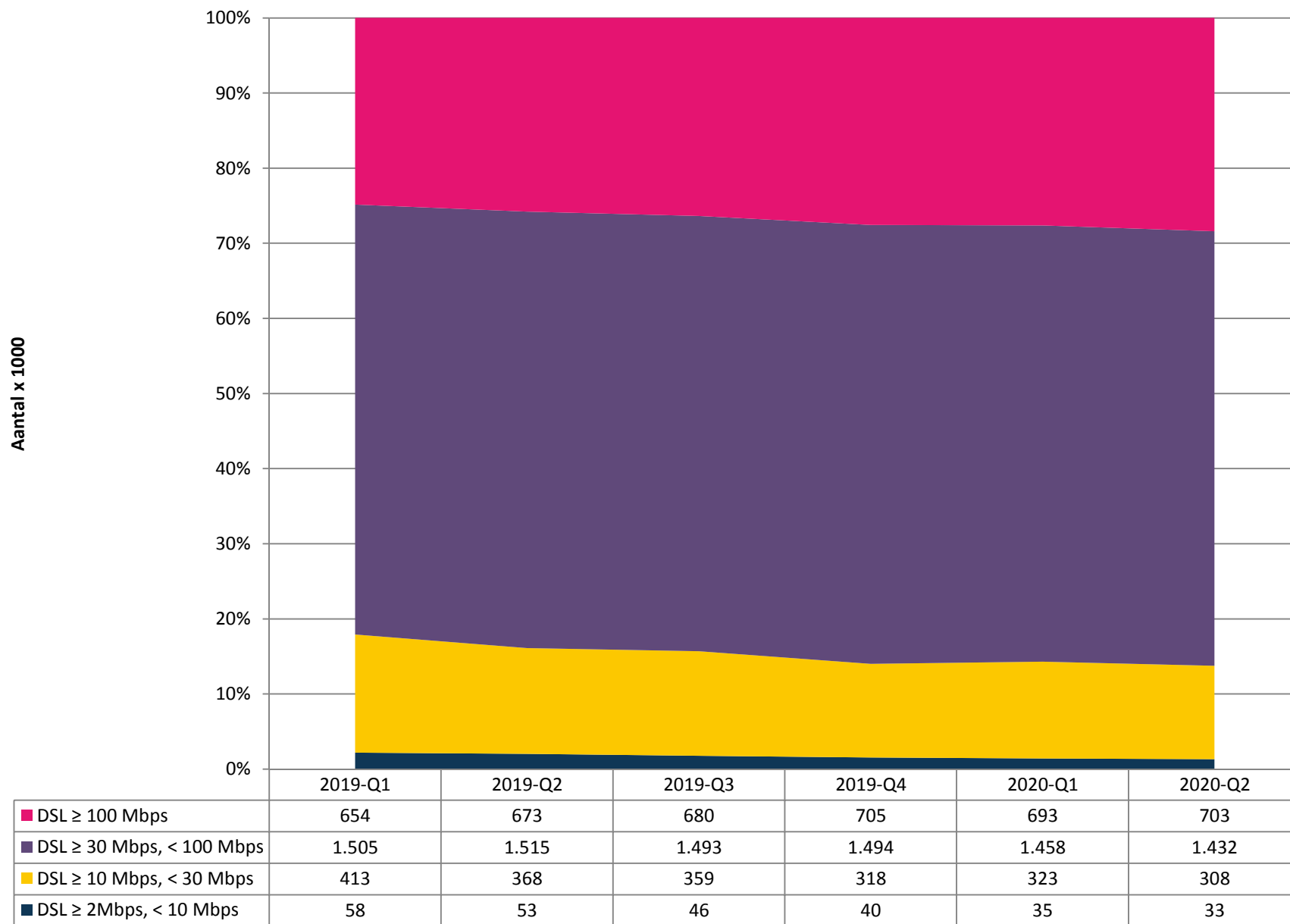
Percentage retail connections by speed



Op basis van vragen 30_A1_1_1-2-3-4-5, 30_A1_2_1-2-3-4-5, 30_A1_3_1-2-3-4-5, 30_A1_4_1-2-3-4-5, en 30_A1_5_1-2-3-4-5 van de Telecommonitor. Snelheid op basis van geadverteerde snelheid

Broadband

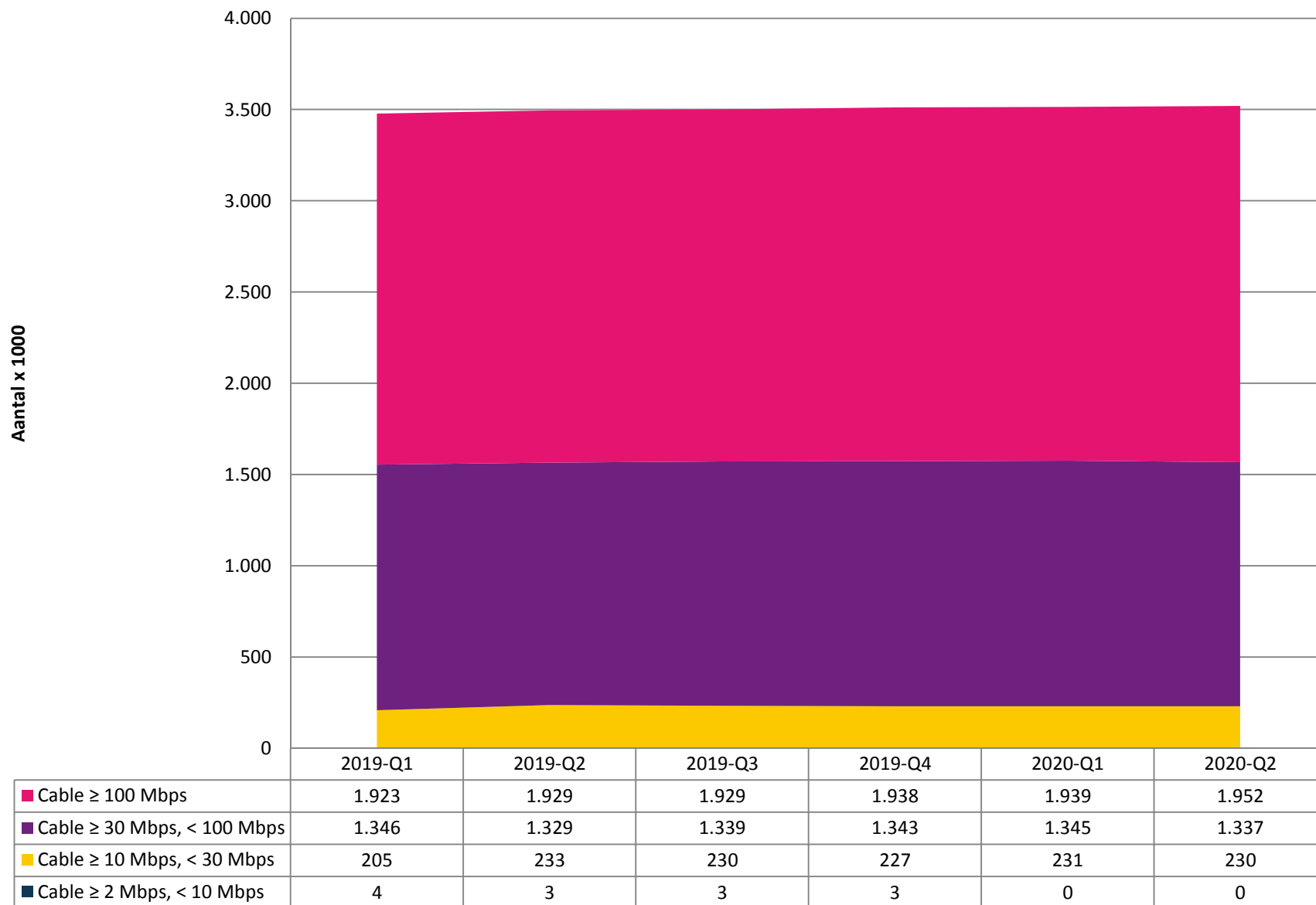
Retail DSL-connections by speed



Op basis van vragen 30_A1_1_1-2-3-4-5 en 30_A1_2_1-2-3-4-5 van de Telecommonitor. Snelheid op basis van geadverteerde snelheid

Broadband

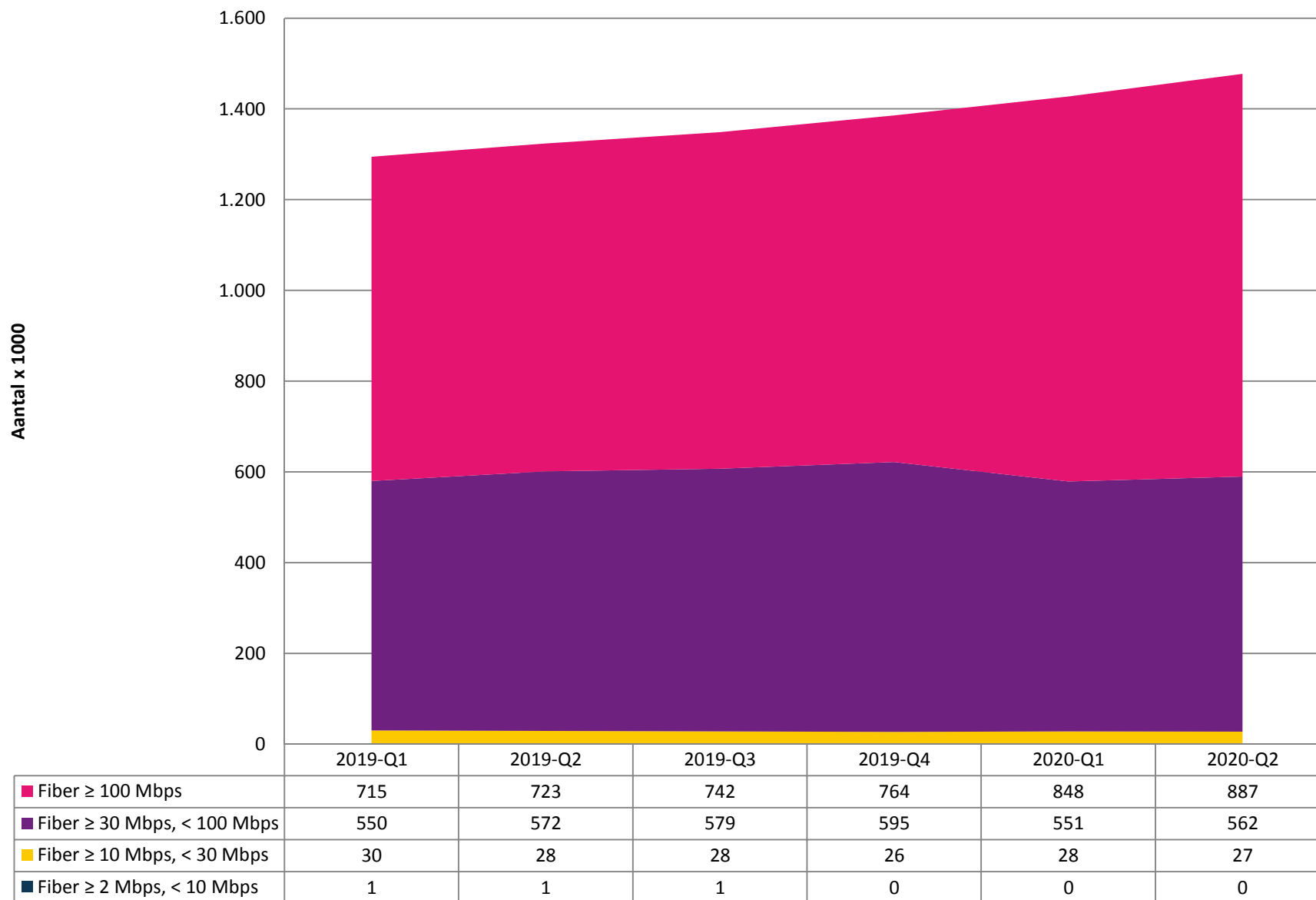
Retail cable connections by speed



Op basis van vragen 30_A1_3_1-2-3-4-5 van de Telecommonitor. Snelheid op basis van geadverteerde snelheid

Broadband

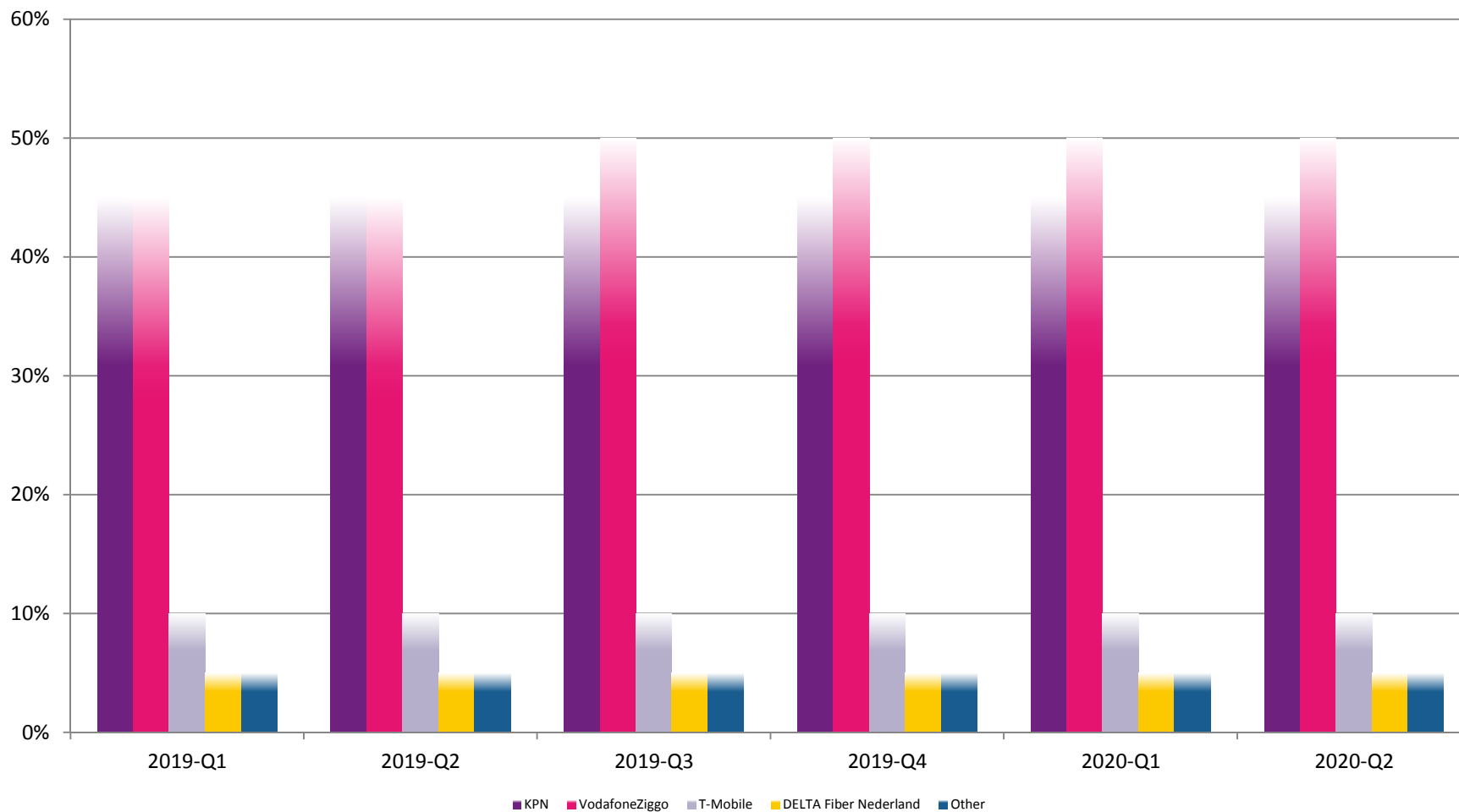
Retail fiber-optic connections by speed



Op basis van vragen 30_A1_4_1-2-3-4-5, en 30_A1_5_1-2-3-4-5 van de Telecommonitor. Snelheid op basis van geadverteerde snelheid

Broadband

Retail market shares based on connections

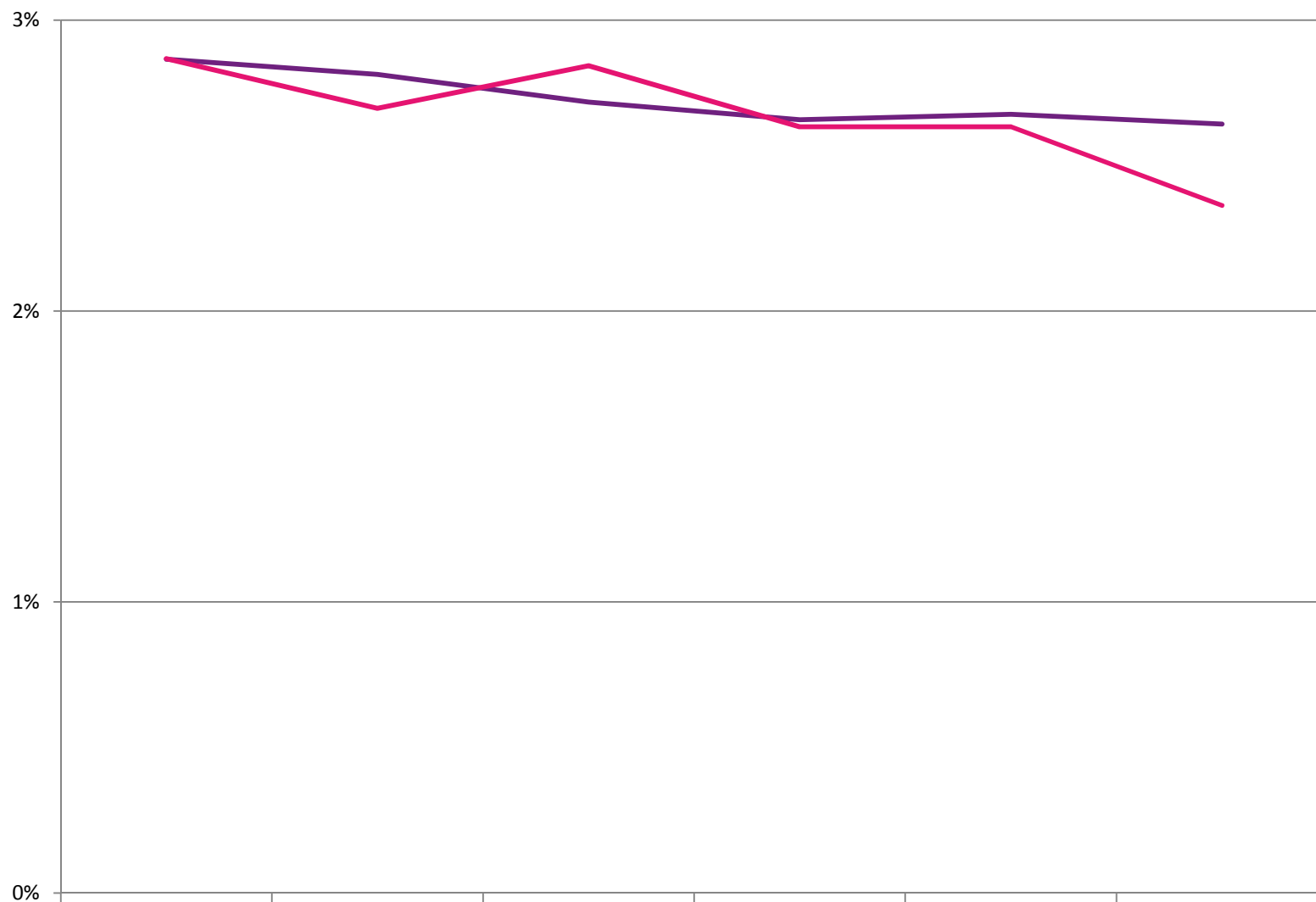


| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|-----------------------|------------|------------|------------|------------|------------|------------|
| KPN | [40 - 45%] | [40 - 45%] | [40 - 45%] | [40 - 45%] | [40 - 45%] | [40 - 45%] |
| VodafoneZiggo | [40 - 45%] | [40 - 45%] | [45 - 50%] | [45 - 50%] | [45 - 50%] | [45 - 50%] |
| T-Mobile | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] |
| DELTA Fiber Nederland | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] |
| Other | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] |

Op basis van vragen 30_A1_1_1-2-3-4-5, 30_A1_2_1-2-3-4-5, 30_A1_3_1-2-3-4-5, 30_A1_4_1-2-3-4-5, 30_A1_5_1-2-3-4-5, en 30_A1_6_1 van de Telecommonitor

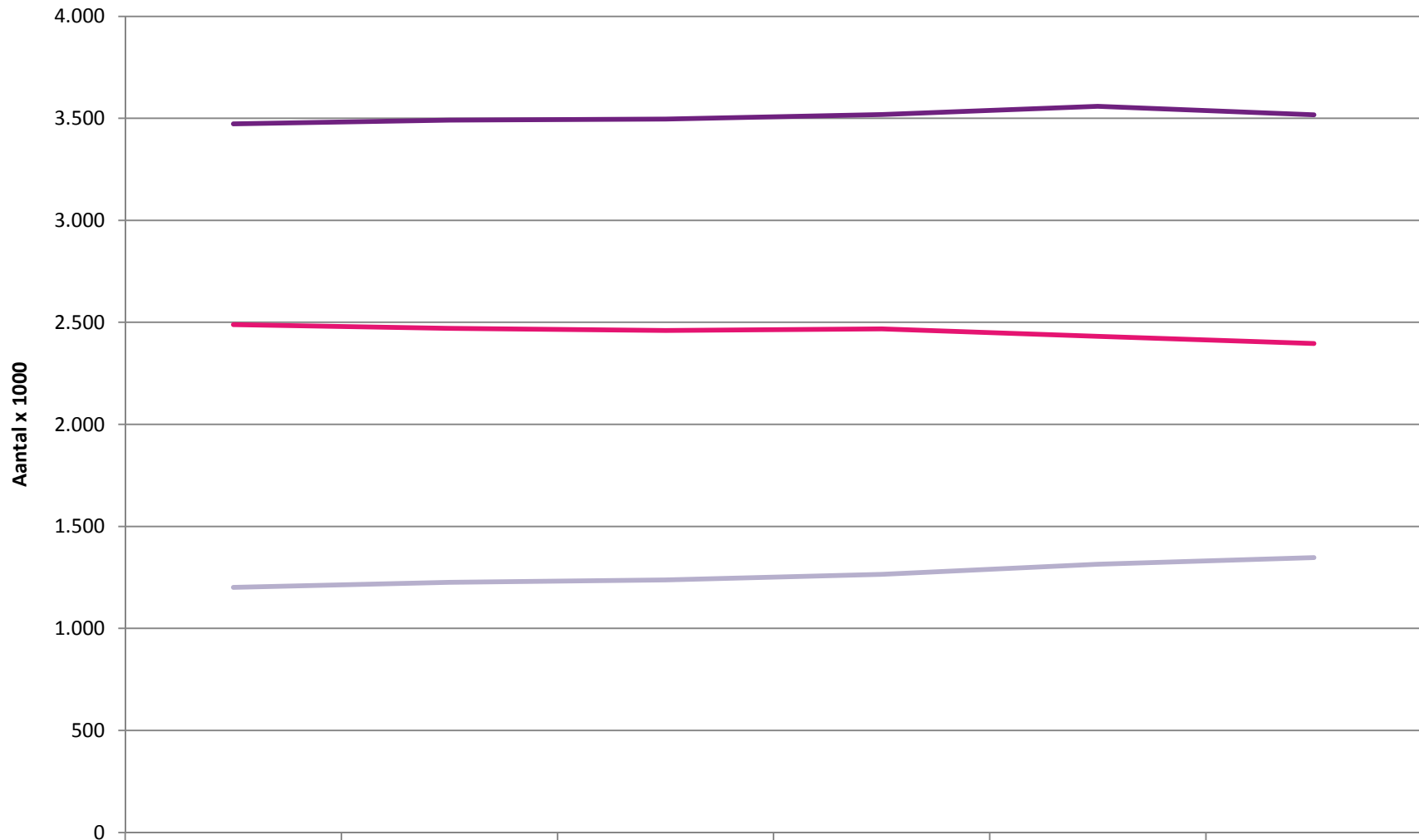
Broadband

Retail churn based on connections



Broadband

Low-quality WBT-connections

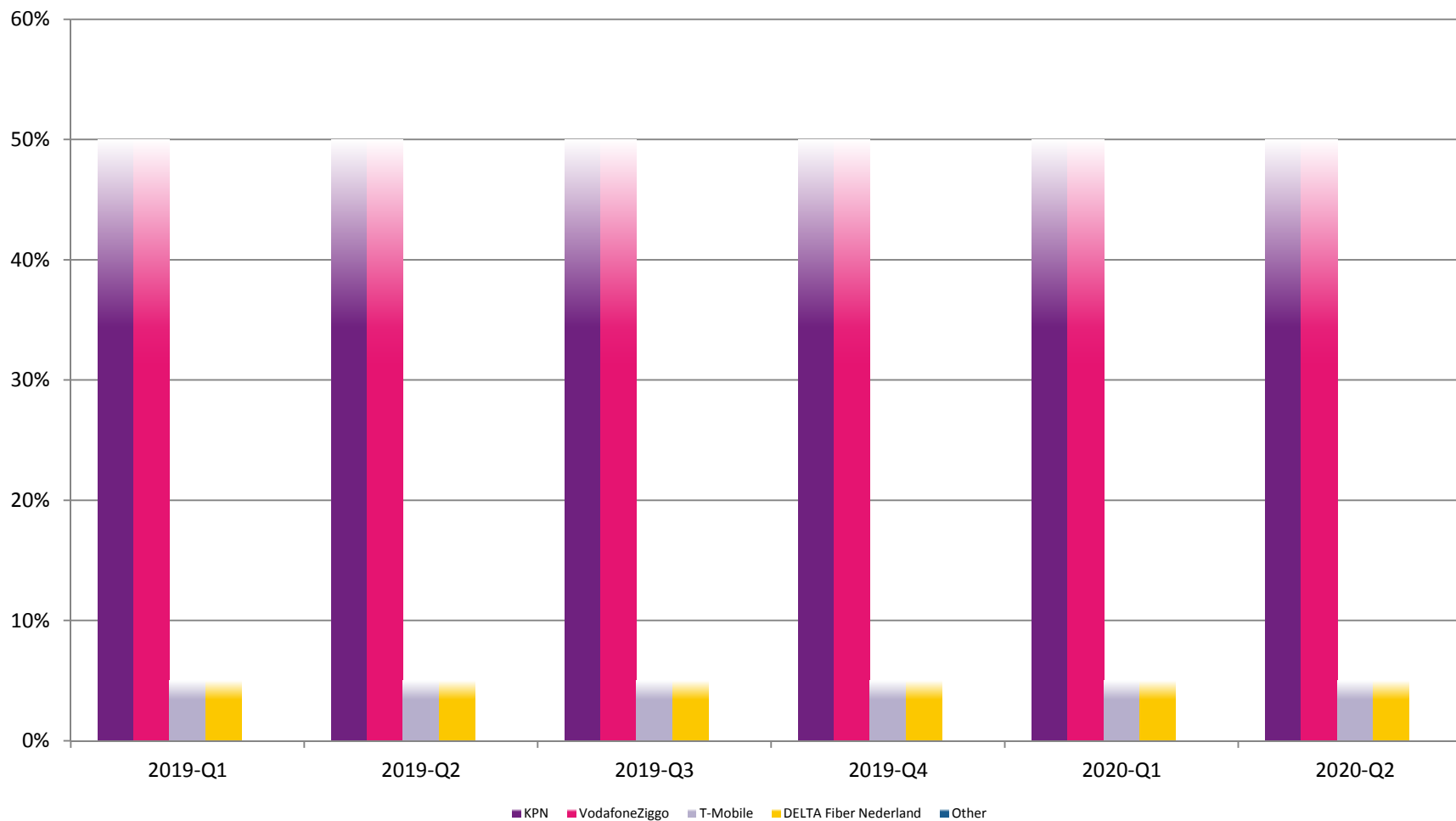


| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|---------|---------|---------|---------|---------|---------|---------|
| — DSL | 2.488 | 2.471 | 2.460 | 2.468 | 2.431 | 2.397 |
| — Cable | 3.472 | 3.491 | 3.497 | 3.519 | 3.558 | 3.517 |
| — Fiber | 1.201 | 1.226 | 1.238 | 1.265 | 1.315 | 1.348 |

Op basis van vragen 30_B3_1_b-c-d-e en 30_B3_2_1-2-3-4 van de Telecommonitor

Broadband

Market share based on low-quality WBT-connections

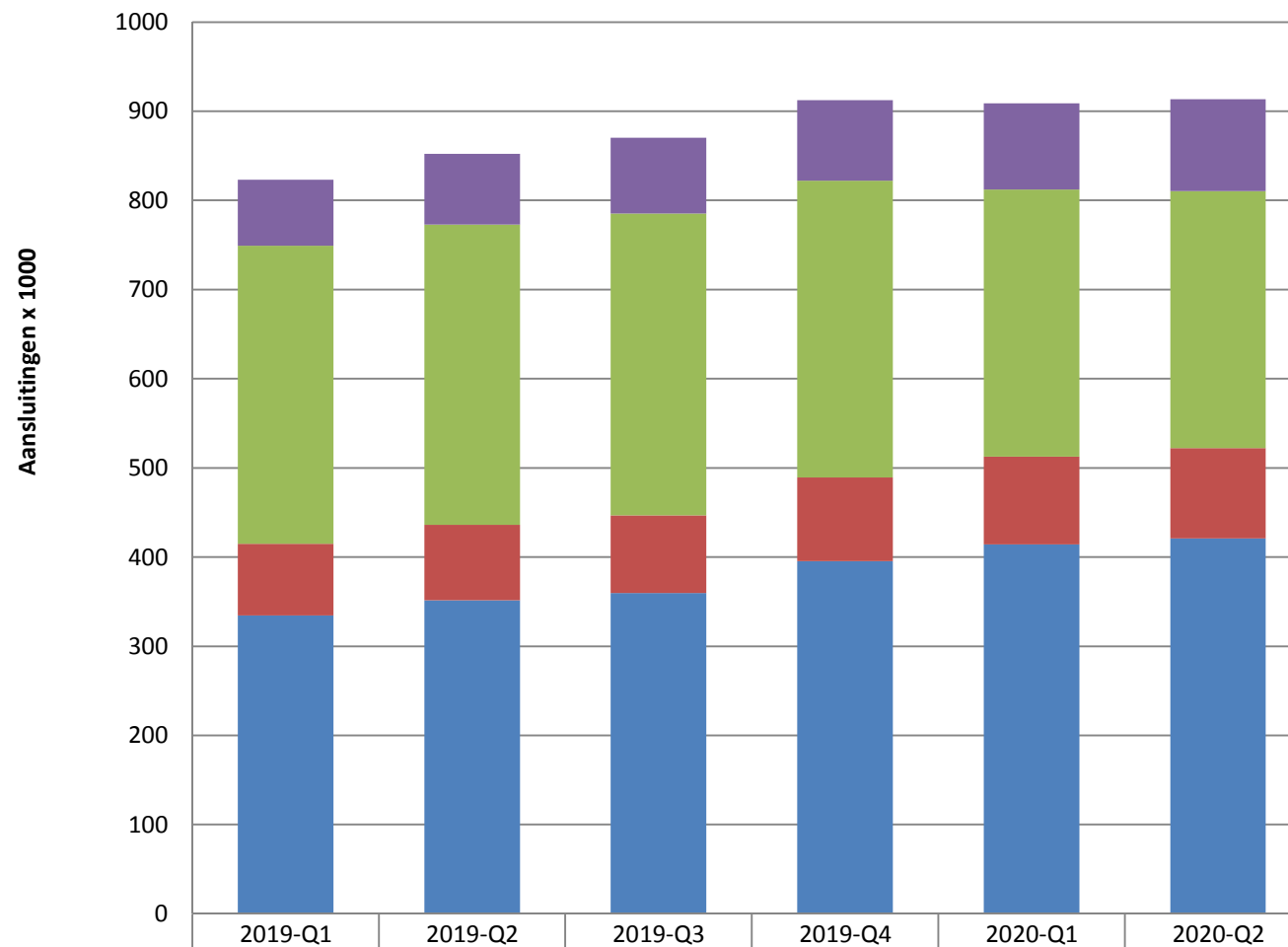


| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|-----------------------|------------|------------|------------|------------|------------|------------|
| KPN | [45 - 50%] | [45 - 50%] | [45 - 50%] | [45 - 50%] | [45 - 50%] | [45 - 50%] |
| VodafoneZiggo | [45 - 50%] | [45 - 50%] | [45 - 50%] | [45 - 50%] | [45 - 50%] | [45 - 50%] |
| T-Mobile | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] |
| DELTA Fiber Nederland | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] |

Op basis van vragen 30_B3_1_b-c-d-e en 30_B3_2_1-2-3-4 van de Telecommonitor

Broadband

Unbundled access and external procurement of copper and fiber-optic (FttH) by alternative providers with KPN



| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|---|---------|---------|---------|---------|---------|---------|
| ■ Unbundled Local Loop Fiber (FttH) | 74 | 79 | 85 | 90 | 96 | 103 |
| ■ (Virtual) Unbundles Local Loop Copper | 334 | 337 | 338 | 333 | 299 | 288 |
| ■ Purchase of active fiber optic connections (FttH) | 80 | 84 | 87 | 94 | 99 | 101 |
| ■ Purchase of active copper connections | 335 | 352 | 360 | 396 | 414 | 421 |

Op basis van vragen 30_B1_1_b-c, 30_B1_2_b-c, en 30_B1_3_b van de Telecommonitor

Broadband

Homes connected and activated (FttH)



Op basis van vragen 0_A3_1_4 en 30_A1_4_1-2-3-4-5 van de Telecommonitor

(21-09-2020) Correctie dubbel telling voor homes connected glasvezel in Q1-2020 rapportage. Nu in lijn met eerdere rapportages.

Broadband

Homes connected to upgraded copper



Aantal x 1.000

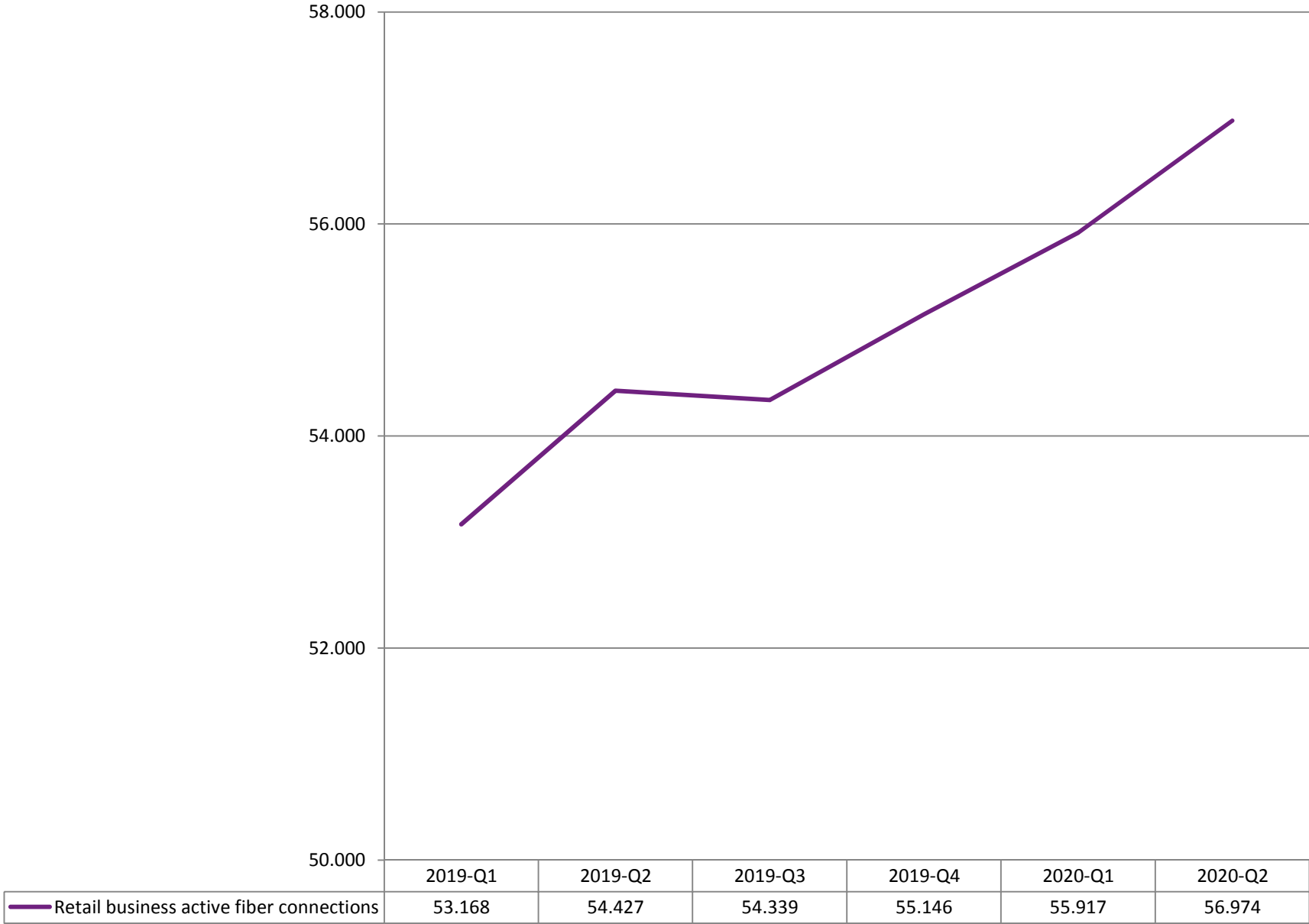


| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|---------------------------------|---------|---------|---------|---------|---------|---------|
| Homes connected upgraded copper | 4.144 | 4.246 | 4.337 | 4.399 | 4.525 | 4.586 |
| Homes activated upgraded copper | 1.456 | 1.501 | 1.526 | 1.586 | 1.614 | 1.585 |

Op basis van vragen 0_A3_1_4 en 30_A1_4_1-2-3-4-5 van de Telecommunitor. Vanaf de straatkast (SDF) zijn hogere xDSL bandbreedte snelheden (tot 200Mbit/s) leverbaar dan via de wijkcentrale (MDF)

Business network services

Retail business fiber-optic connections

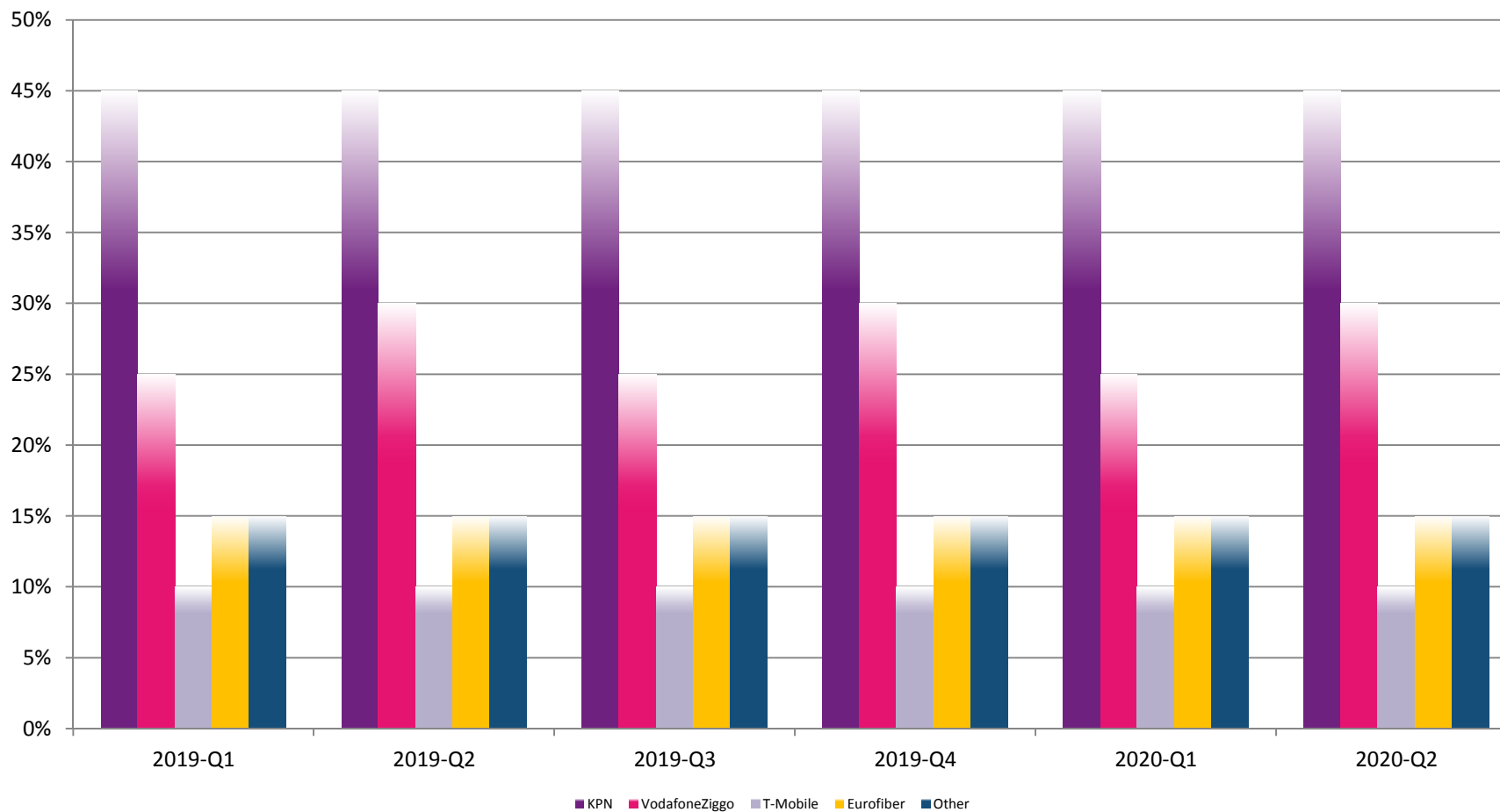


Op basis van vragen 30_A2_1_1 van de Telecommonitor. Exclusief aansluitingen kleine en regionale marktpartijen

Correctie 2020-Q1 - Retail zakelijke glasaansluitingen: 56.564 > 55.971

Business network services

Market share based on retail business fiber-optic connections

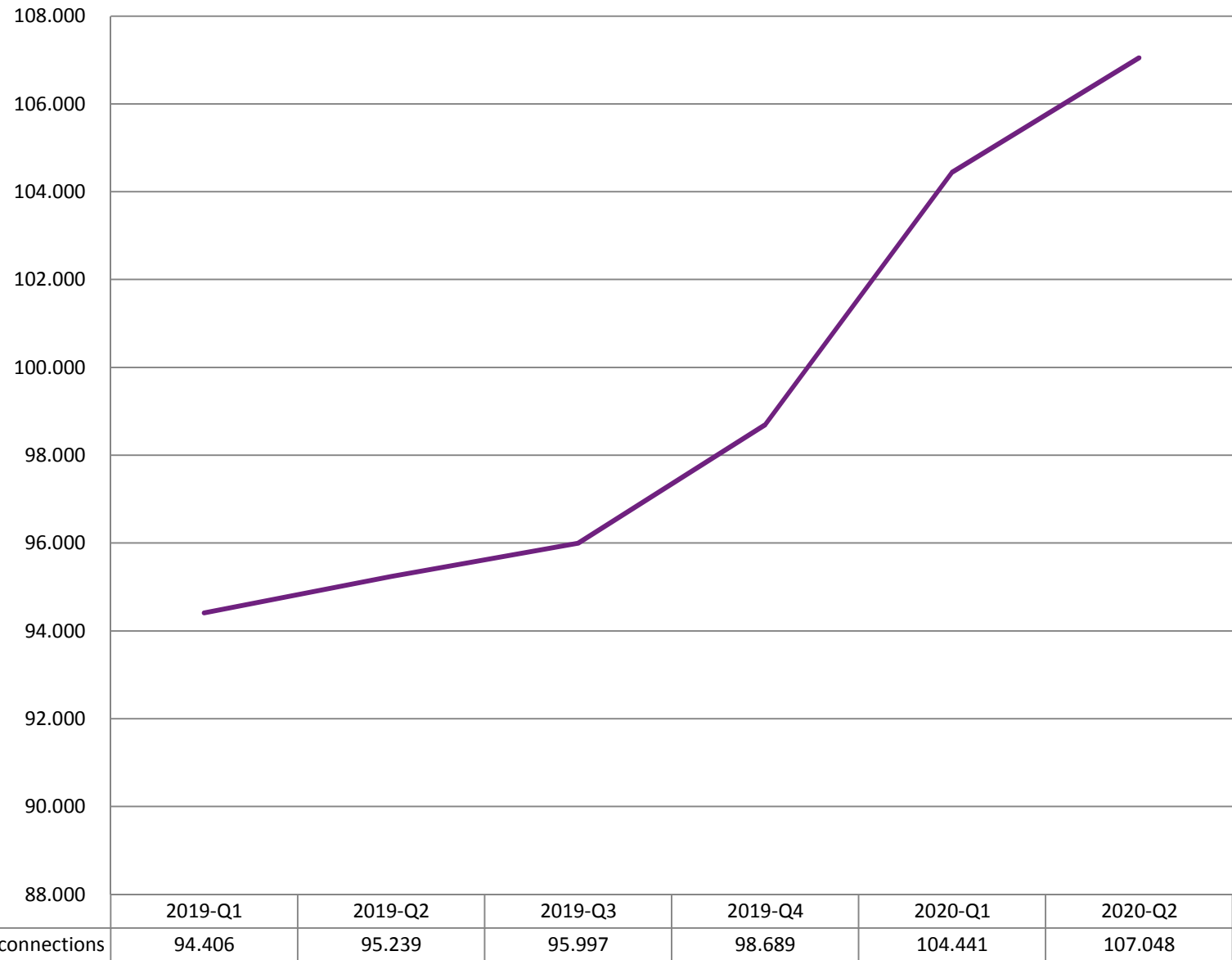


| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|---------------|------------|------------|------------|------------|------------|------------|
| KPN | [40 - 45%] | [40 - 45%] | [40 - 45%] | [40 - 45%] | [40 - 45%] | [40 - 45%] |
| VodafoneZiggo | [20 - 25%] | [25 - 30%] | [20 - 25%] | [25 - 30%] | [20 - 25%] | [25 - 30%] |
| T-Mobile | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] |
| Eurofiber | [10 - 15%] | [10 - 15%] | [10 - 15%] | [10 - 15%] | [10 - 15%] | [10 - 15%] |
| Other | [10 - 15%] | [10 - 15%] | [10 - 15%] | [10 - 15%] | [10 - 15%] | [10 - 15%] |

Op basis van vragen 30_A2_1_1 van de Telecommonitor. Aansluitingen kleine en regionale marktpartijen wordt niet meegenomen in het berekenen van het marktaandeel

Business network services

Wholesale business fiber-optic connections

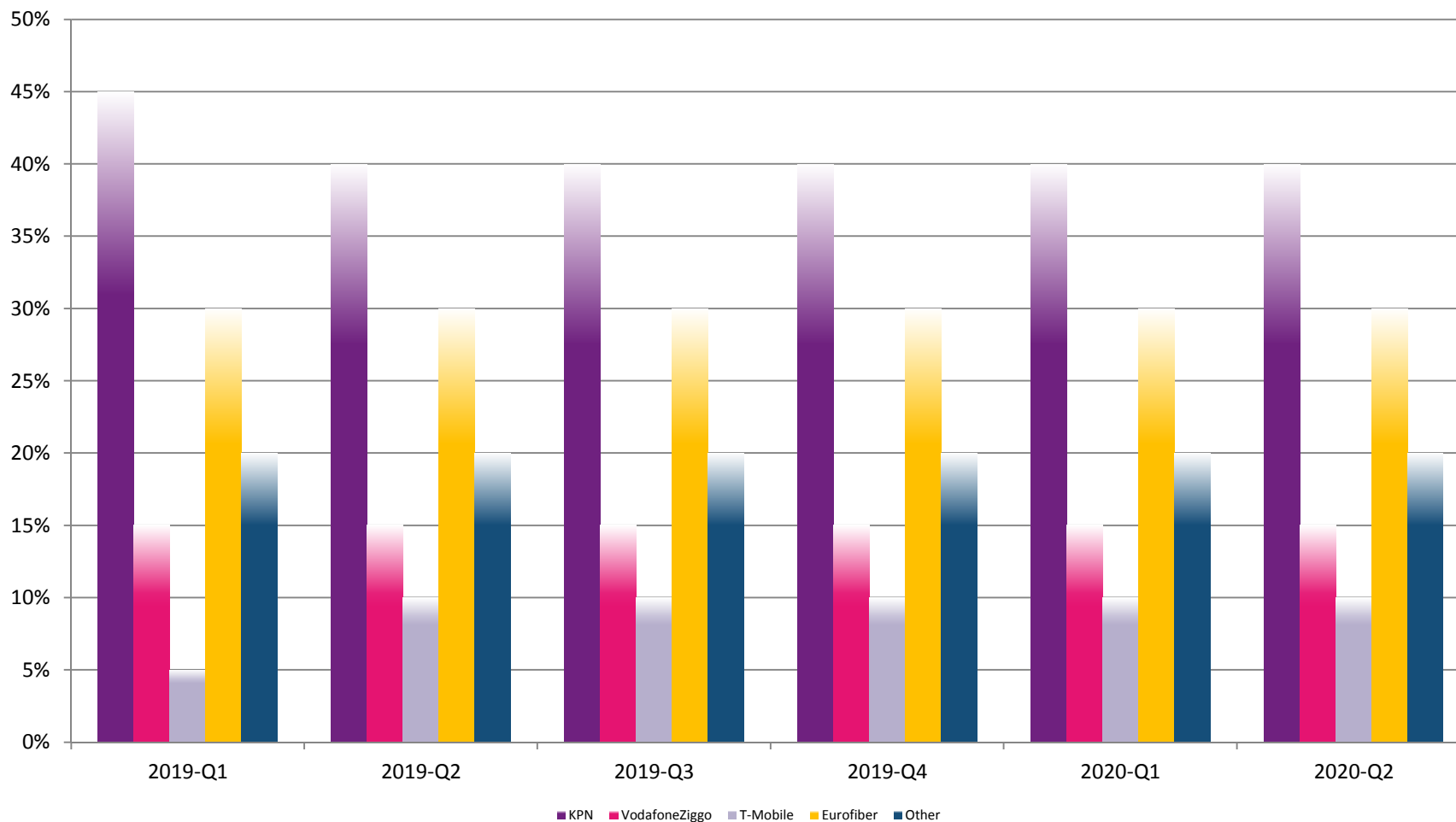


Op basis van vragen 30_B4_1_1-3, 30_B4_8_1, 30_A2_1_1-2, en 30_A2_4_1 van de Telecommonitor. Inclusief schatting aansluitingen kleine en regionale marktpartijen

Correctie 2020-Q1 - Wholesale zakelijke glasaansluitingen: 105.270 > 104.441

Business network services

Wholesale market share based on business fiber-optic connections



| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|---------------|------------|------------|------------|------------|------------|------------|
| KPN | [40 - 45%] | [35 - 40%] | [35 - 40%] | [35 - 40%] | [35 - 40%] | [35 - 40%] |
| VodafoneZiggo | [10 - 15%] | [10 - 15%] | [10 - 15%] | [10 - 15%] | [10 - 15%] | [10 - 15%] |
| T-Mobile | [0 - 5%] | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] |
| Eurofiber | [25 - 30%] | [25 - 30%] | [25 - 30%] | [25 - 30%] | [25 - 30%] | [25 - 30%] |
| Other | [15 - 20%] | [15 - 20%] | [15 - 20%] | [15 - 20%] | [15 - 20%] | [15 - 20%] |

Op basis van vragen 30_B4_1_1-3, 30_B4_8_1, 30, 30_A2_1_1-2, en 30_A2_4_1 van de Telecommonitor. *Marktaandeel kleine en regionale marktpartijen zijn geschat op 10% (zie marktanalyse ODF-Access (FttO))

Business network services

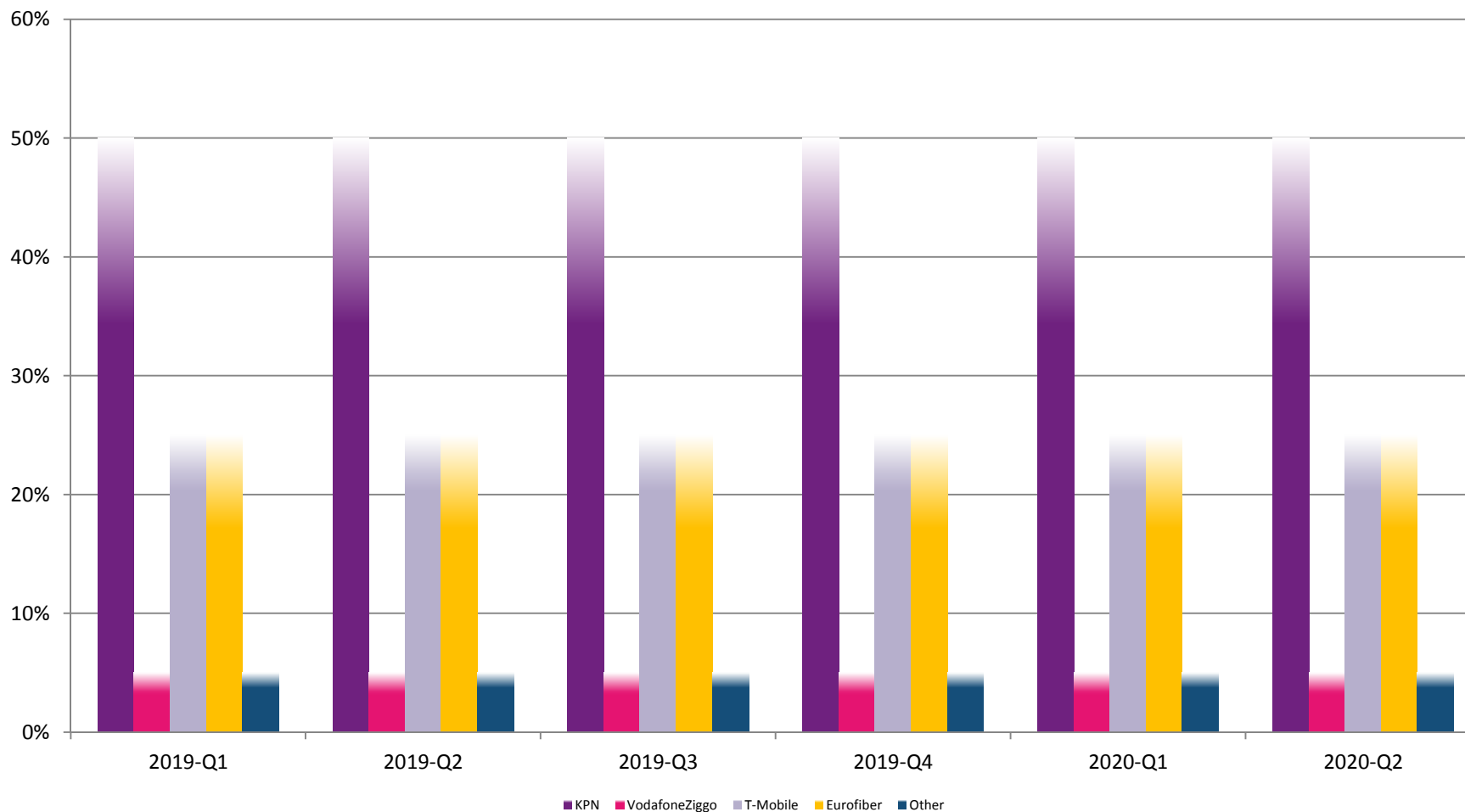
Wholesale HKWBT and leased lines



Op basis van vragen 30_A2_4_1, 30_B2_1_b-c-d, 30_B2_2_1-2-3, 30_B4_3_b-c-d-e, 30_B4_4_1-2-3-4, 30_B4_6_b-c, 30_B4_7_1-2 en 30_B4_8_1 van de Telecommunitor. De cijfers zijn gebaseerd op de marktafbakening die volgt uit het marktanalysebesluit HKWBT/HL 2012.

Business network services

Wholesale market share of HKWBT and leased lines



| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|---------------|------------|------------|------------|------------|------------|------------|
| KPN | [45 - 50%] | [45 - 50%] | [45 - 50%] | [45 - 50%] | [45 - 50%] | [45 - 50%] |
| VodafoneZiggo | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] |
| T-Mobile | [20 - 25%] | [20 - 25%] | [20 - 25%] | [20 - 25%] | [20 - 25%] | [20 - 25%] |
| Eurofiber | [20 - 25%] | [20 - 25%] | [20 - 25%] | [20 - 25%] | [20 - 25%] | [20 - 25%] |
| Other | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] |

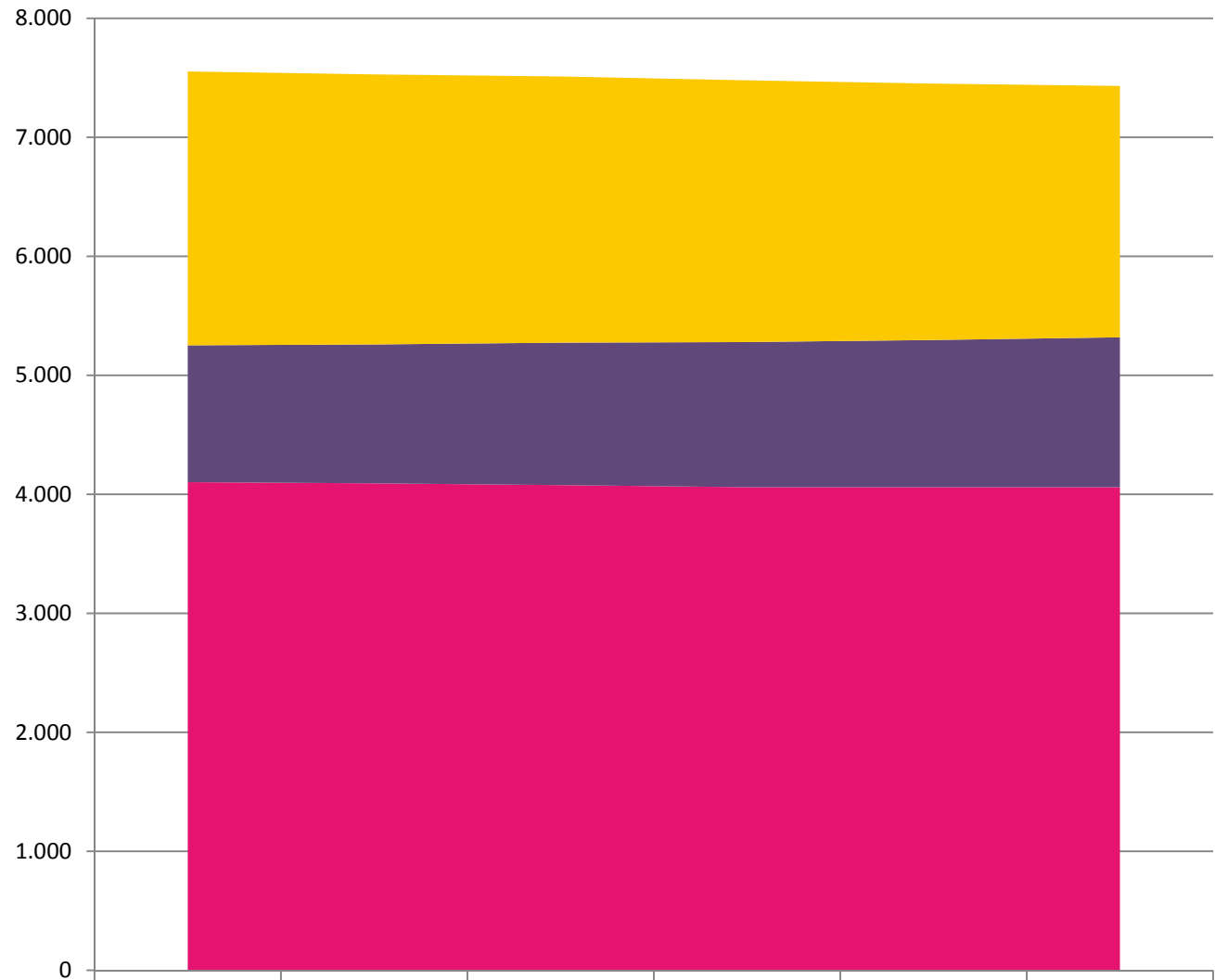
Op basis van vragen 30_A2_4_1, 30_B2_1_b-c-d, 30_B2_2_1-2-3, 30_B4_3_b-c-d-e, 30_B4_4_1-2-3-4, 30_B4_6_b-c, 30_B4_7_1-2 en 30_B4_8_1 van de Telecommonitor. De cijfers zijn gebaseerd op de marktafbakening die volgt uit het marktanalysebesluit HKWBT/HL 2012

Television

Retail subscriptions per connection type



Aantal x 1.000

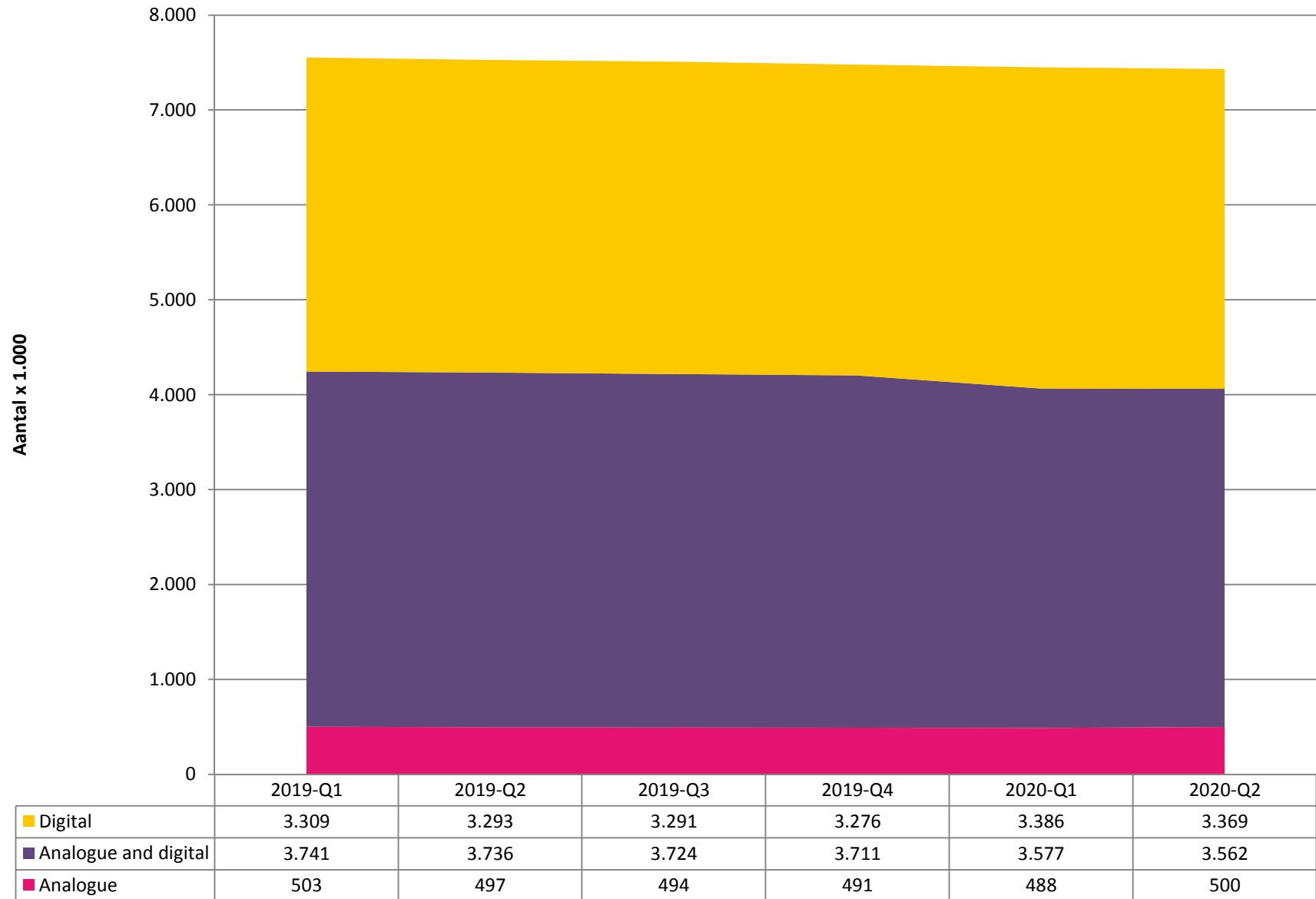


| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|---|---------|---------|---------|---------|---------|---------|
| ■ Digital platforms (DSL, Digitenne, Satellite) | 2.302 | 2.270 | 2.236 | 2.199 | 2.155 | 2.114 |
| ■ Fiber | 1.149 | 1.167 | 1.197 | 1.218 | 1.237 | 1.259 |
| ■ Cable | 4.102 | 4.090 | 4.077 | 4.060 | 4.058 | 4.058 |

Op basis van vragen 40_A1_1_1-2-3, 40_A1_2_1-2, 40_A1_3_1-2-3, en 40_A1_4_1-2-3-4 van de Telecommonitor

Television

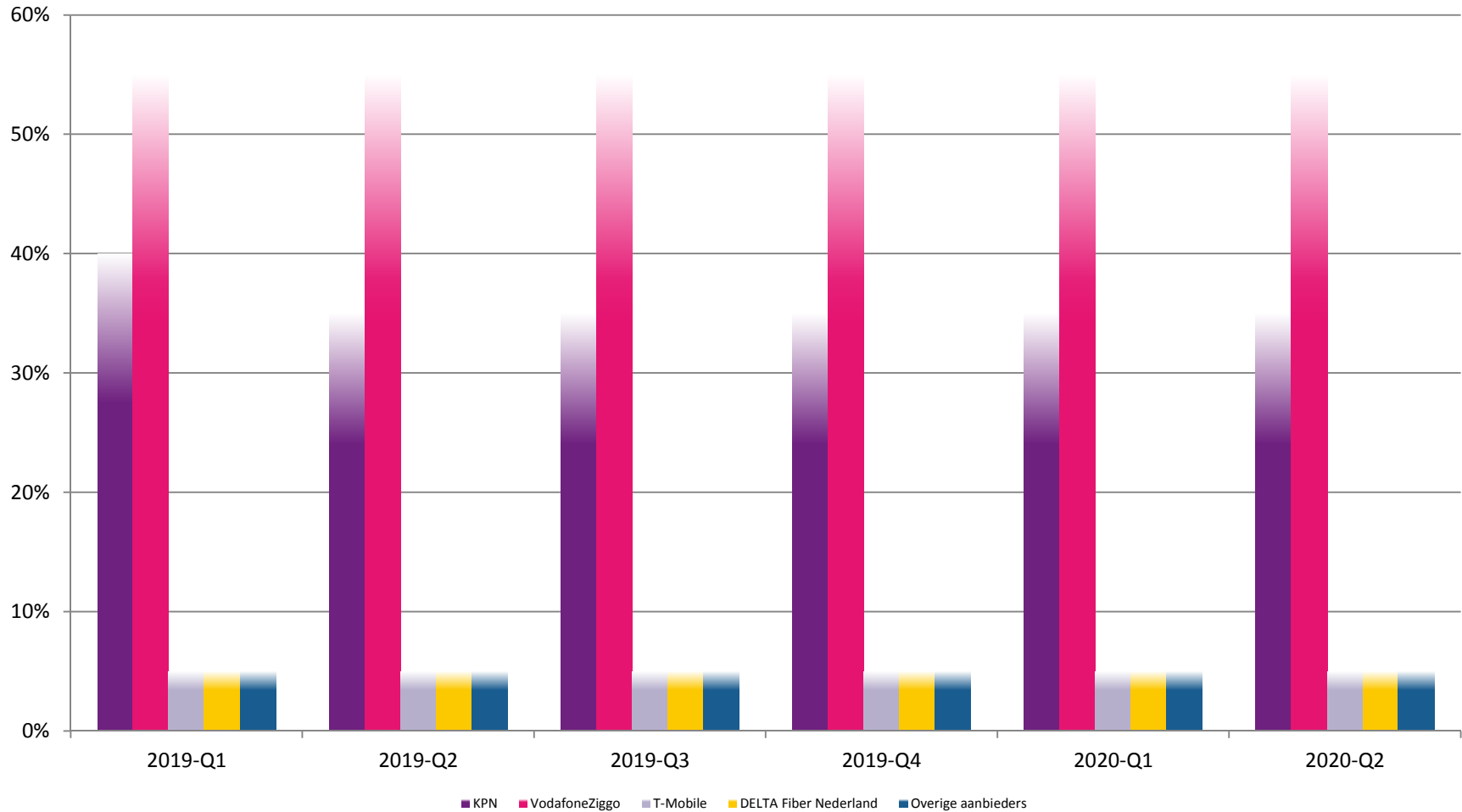
Digitalization of television subscriptions



Op basis van vragen 40_A1_1_1-2-3, 40_A1_2_1-2, 40_A1_3_1-2-3, en 40_A1_4_1-2-3-4 van de Telecommonitor

Television

Retail market shares based on subscriptions

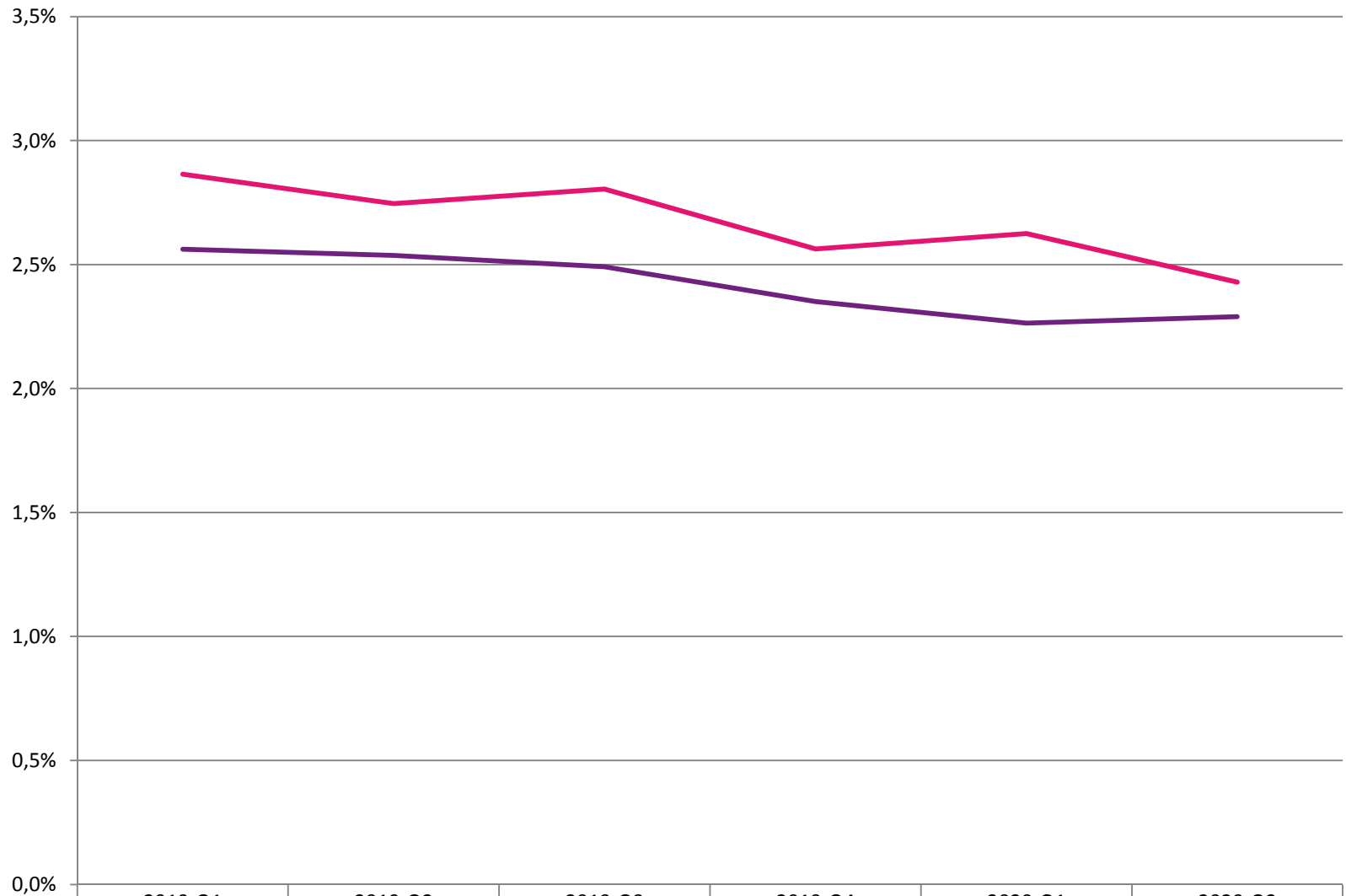


| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|-----------------------|------------|------------|------------|------------|------------|------------|
| KPN | [35 - 40%] | [30 - 35%] | [30 - 35%] | [30 - 35%] | [30 - 35%] | [30 - 35%] |
| VodafoneZiggo | [50 - 55%] | [50 - 55%] | [50 - 55%] | [50 - 55%] | [50 - 55%] | [50 - 55%] |
| T-Mobile | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] |
| DELTA Fiber Nederland | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] |
| Other | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] |

Op basis van vragen 40_A1_1_1-2-3, 40_A1_2_1-2, 40_A1_3_1-2-3, en 40_A1_4_1-2-3-4 van de Telecommonitor

Television

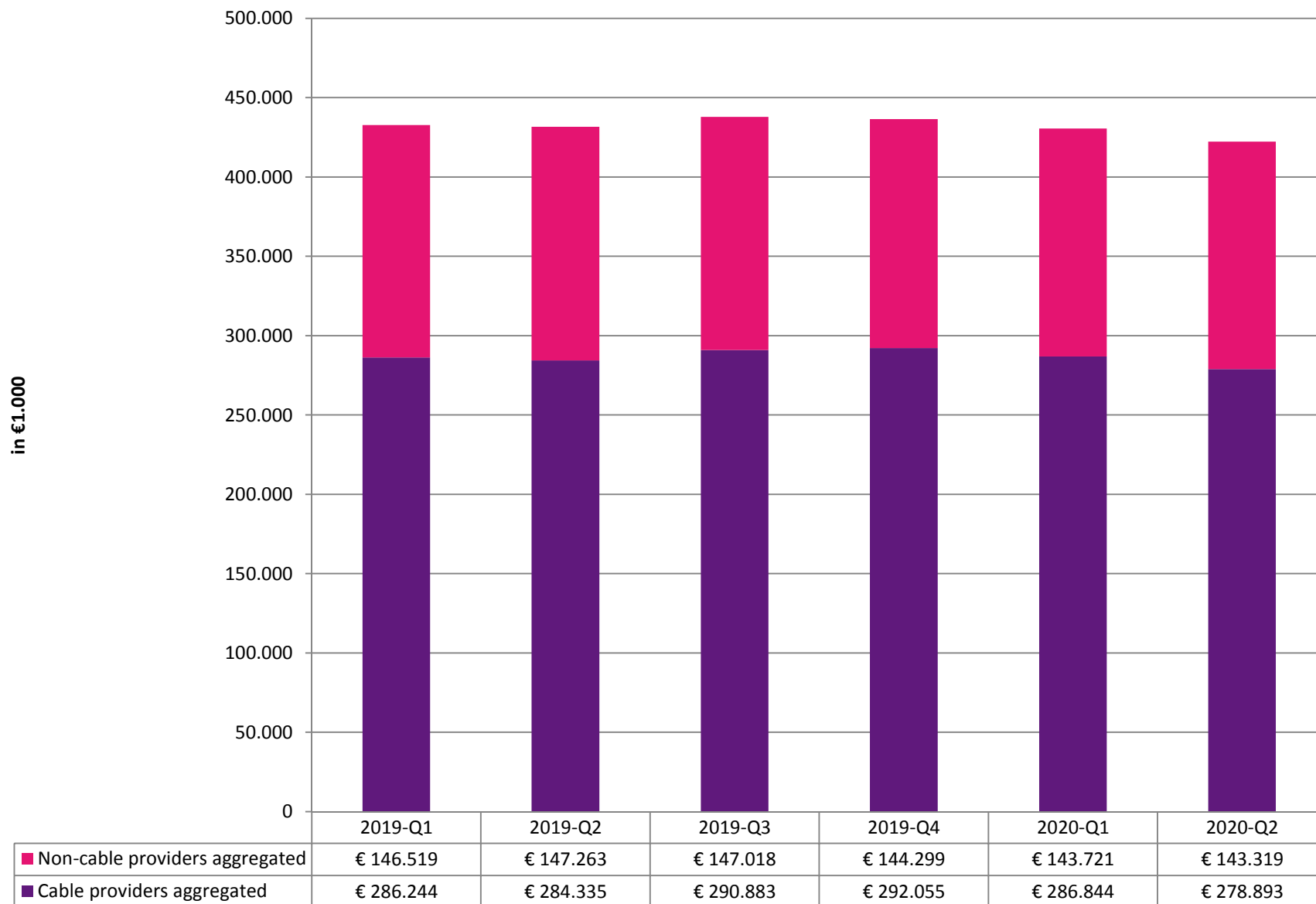
Retail churn of television subscriptions



Op basis van vragen 40_A2_1_1-2, 40_A2_2_1-2, 40_A2_3_1-2, 40_A2_4_1-2, 40_A2_5_1-2 en 40_A2_6_1-2 van de Telecommonitor

Television

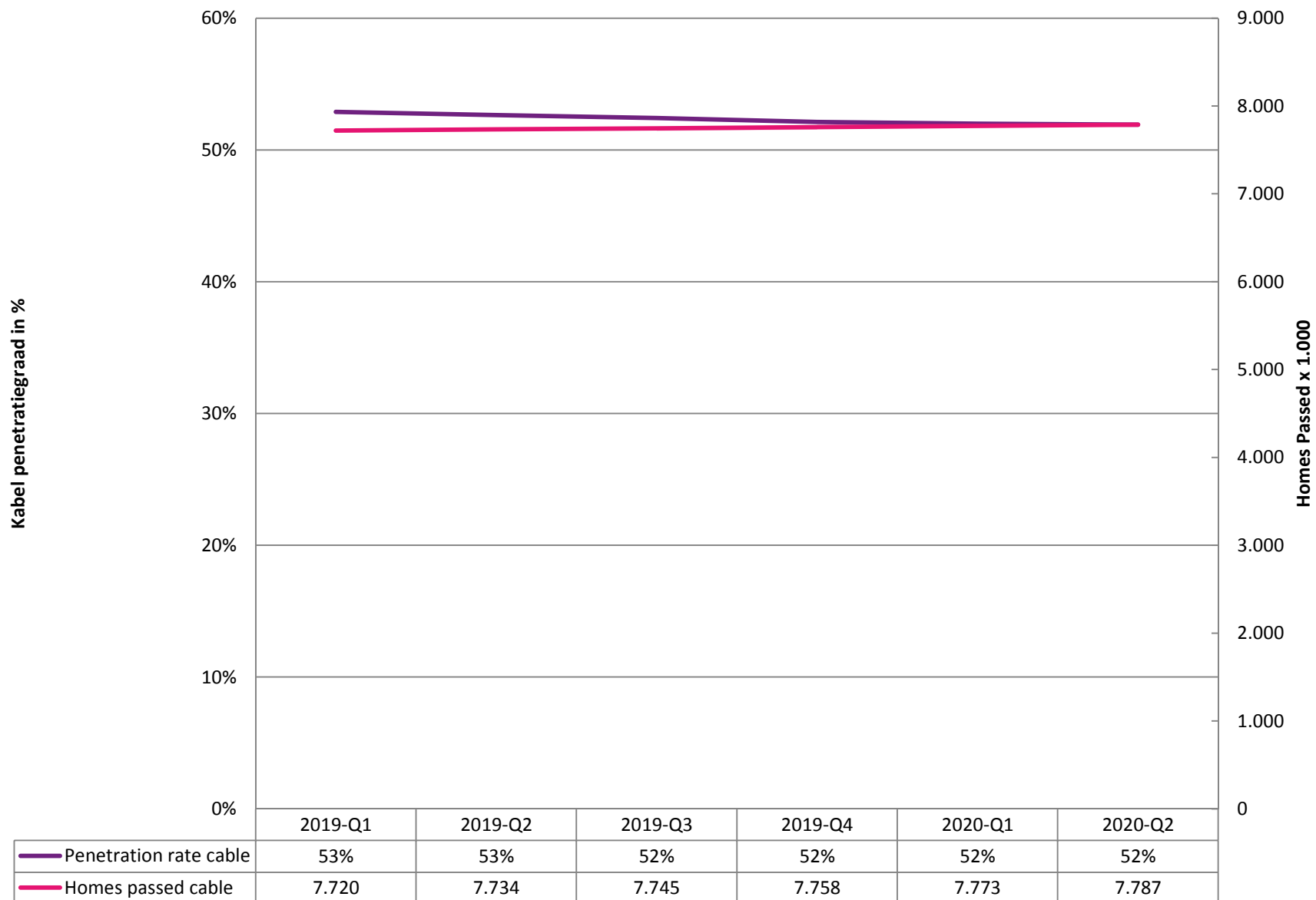
Retail turnover of radio/tv subscriptions



Op basis van vragen 40_A3_1_1-2-3, 40_A3_2_1-2-3, 40_A3_3_1-2, 40_A2_4_1-2 en 40_A2_5_1-2-3 van de Telecommonitor

Television

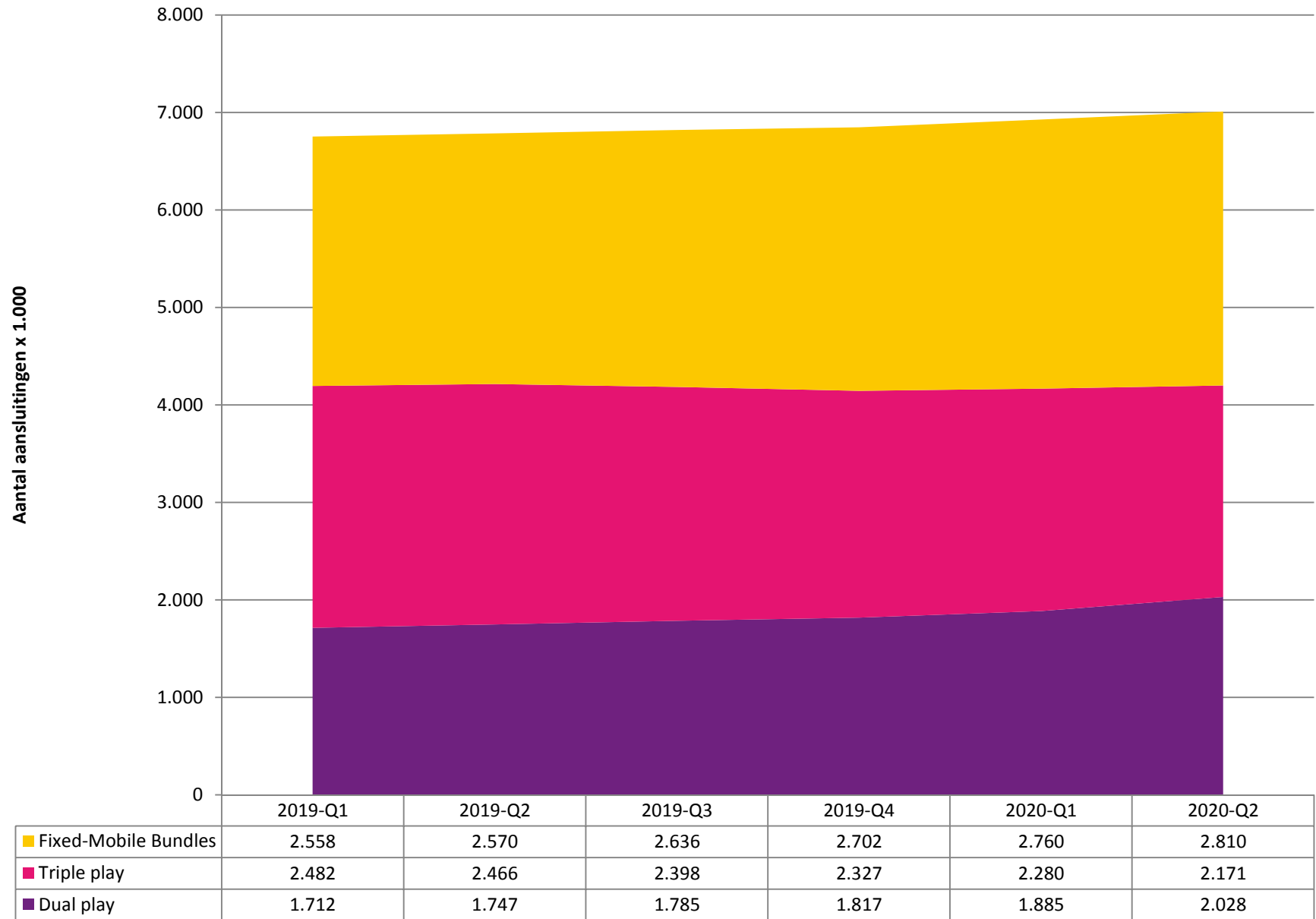
Homes passed and cable penetration level



Op basis van vragen 40_A1_1_1-2-3, 40_A1_2_1-2, 40_A1_3_1-2-3, en 40_A1_4_1-2-3-4 van de Telecommonitor

Bundles

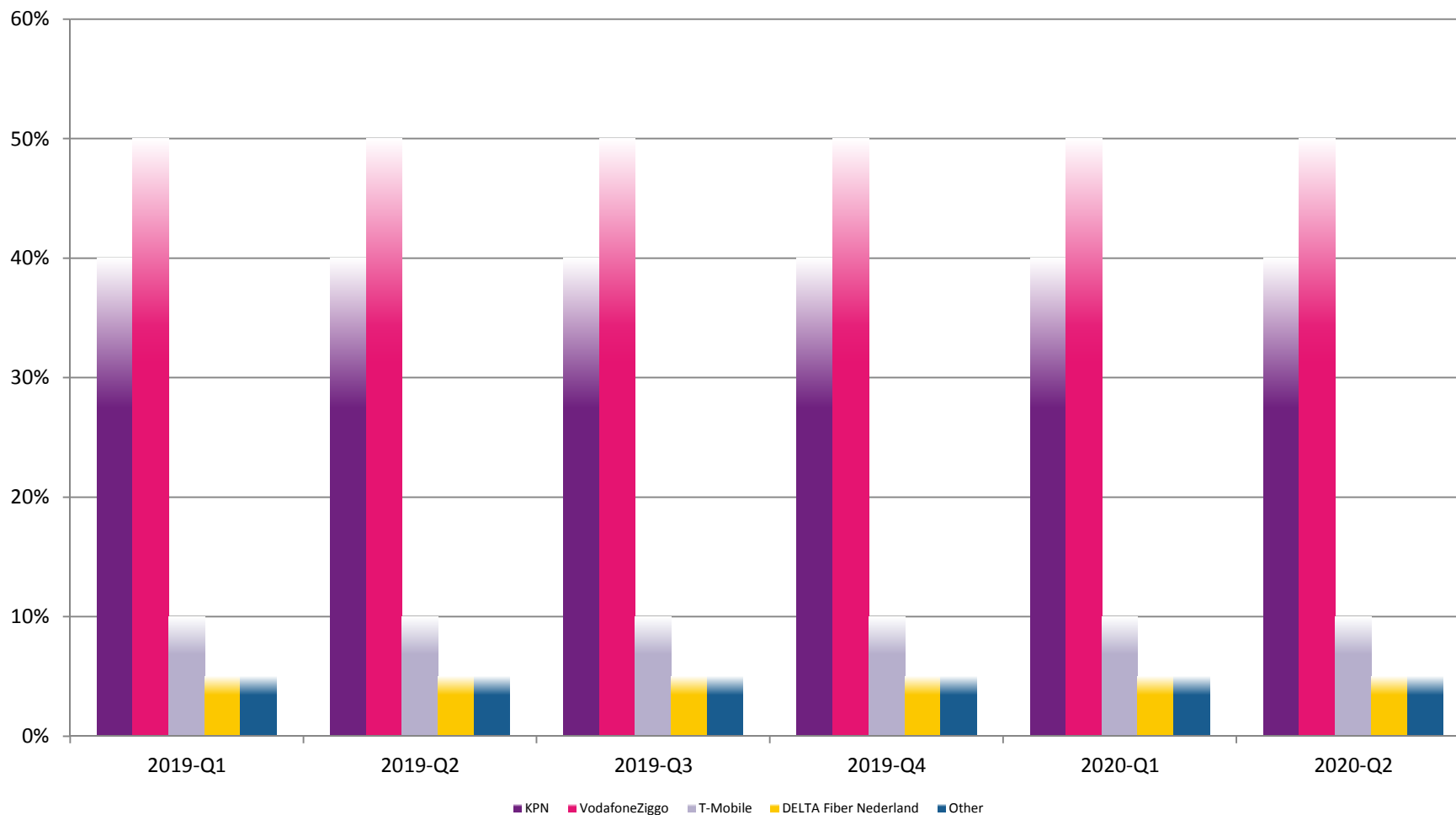
Retail connections of bundles



Op basis van vragen 50_A1_1_1-2-3-5-6, 50_A1_2_1-2-3-4, en 50_A1_3_1 van de Telecommonitor

Bundles

Retail market share of bundles



| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|-----------------------|------------|------------|------------|------------|------------|------------|
| KPN | [35 - 40%] | [35 - 40%] | [35 - 40%] | [35 - 40%] | [35 - 40%] | [35 - 40%] |
| VodafoneZiggo | [45 - 50%] | [45 - 50%] | [45 - 50%] | [45 - 50%] | [45 - 50%] | [45 - 50%] |
| T-Mobile | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] |
| DELTA Fiber Nederland | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] |
| Other | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] |

Op basis van vragen 50_A1_1_1-2-3-4-5-6, 50_A1_2_1-1-2-3-4, en 50_A1_3_1 van de Telecommonitor

Bundles

Retail connections with broadband



| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|-----------------------------|---------|---------|---------|---------|---------|---------|
| ■ Broadband in Fixed-Mobile | 24% | 24% | 25% | 25% | 25% | 25% |
| ■ Broadband in triple play | 43% | 42% | 42% | 41% | 41% | 40% |
| ■ Broadband in dual play | 24% | 24% | 25% | 25% | 26% | 27% |
| ■ Broadband only | 9% | 9% | 8% | 8% | 7% | 7% |

Op basis van vragen 30_A1_1_1-2-3-4-5, 30_A1_2_1-2-3-4-5, 30_A1_3_1-2-3-4-5, 30_A1_4_1-2-3-4-5, 30_A1_5_1-2-3-4-5, 50_A1_1_1-4-5, 50_A1_2_1-2-4, en 50_A1_3_1 van de Telecommonitor

Bundles

Retail connections with television



| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|----------------------|---------|---------|---------|---------|---------|---------|
| ■ TV in Fixed-Mobile | 23% | 23% | 24% | 24% | 24% | 25% |
| ■ TV in triple play | 39% | 39% | 39% | 39% | 39% | 38% |
| ■ TV in dual play | 17% | 18% | 18% | 19% | 20% | 22% |
| ■ TV only | 21% | 20% | 19% | 18% | 16% | 15% |

Op basis van vragen 40_A1_1_1-2-3, 40_A1_2_1-2, 40_A1_3_1-2-3, 40_A1_4_1-2-3-4, 50_A1_1_1-2-3, 50_A1_2_1-3, en 50_A1_3_1 van de Telecommonitor

Bundles

Retail connections with fixed telephony



| | 2019-Q1 | 2019-Q2 | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 |
|-----------------------------------|---------|---------|---------|---------|---------|---------|
| ■ Fixed telephony in Fixed-Mobile | 31% | 32% | 33% | 34% | 34% | 36% |
| ■ Fixed telephony in triple play | 45% | 45% | 44% | 44% | 43% | 43% |
| ■ Fixed telephony in dual play | 7% | 7% | 7% | 6% | 6% | 7% |
| ■ Fixed telephony only | 18% | 16% | 17% | 16% | 16% | 14% |

Op basis van vragen 20_A1_1_1-2-3-4-5-6, 20_A1_7_1-2-3-4-5, 50_A1_1_2-4-6, 50_A1_2_1-3-4, en 50_A1_3_1 van de Telecommonitor

Interviewed market participants

Data is provided per market by the below market participants

| Financiële gegevens / Netwerk | Mobiel | Vaste telefonie |
|--|--|--|
| AT&T BT CanalDigitaal Colt Delta Fiber Ned. (Caiway, Delta, CIF, Cogas, Rendo) Eurofiber KPN T-Mobile (incl. Tele2) Verizon VodafoneZiggo | KPN T-Mobile (incl. Tele2) VodafoneZiggo | AT&T BT CanalDigitaal Colt Delta Fiber Nederland Eurofiber KPN T-Mobile (incl. Tele2) Verizon VodafoneZiggo |
| Breedband en netwerkdiensten | Televisie | Bundels |
| AT&T BT CanalDigitaal Colt Delta Fiber Nederland Eurofiber KPN T-Mobile (incl. Tele2) Verizon VodafoneZiggo | CanalDigitaal Delta Fiber Nederland KPN T-Mobile (incl. Tele2) VodafoneZiggo | CanalDigitaal Delta Fiber Nederland KPN T-Mobile (incl. Tele2) VodafoneZiggo |