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Consument & Markt



Telecom Monitor

Q1 2021

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.

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Trends Q1 2021

ACM Telecom Monitor Q1 2021: considerably more fiber-optic rolled out

In the first quarter of 2021, the number of homes that are connected to a fiber-optic network went up by 200,000. With that increase, the growth of the past few years has continued forcefully. In 2020, a total of 500,000 homes were connected to a fiber-optic network, whereas in 2019, that figure was just 180,000. In total, approximately 3.9 million households (out of 8 million households) in the Netherlands are connected to a fiber-optic network. These are some of the conclusions in the Telecom Monitor of the Netherlands Authority for Consumers and Markets (ACM).

Faster download speeds

Households increasingly opt for broadband connections with higher download speeds. For the first time ever, over half of all broadband connections have download speeds of over 100 Mbps. With a market share of 50 percent, broadband over cable, which, like fiber-optic, can achieve download speeds of up to 1 Gbit/s, continues to be the most used type of fast broadband. Fiber-optic and copper connections have market shares of 30 and 20 percent, respectively.



The Netherlands has a total of 7.5 million broadband connections. The number of households that opt for fiber-optic plans increased by 7 percent to 1.7 million. There are 3.5 million households with cable plans. That number has remained stable. Fewer people purchase broadband plans over KPN's copper network, which has experienced a decrease of 3 percent. KPN has announced that, starting in 2023, it will phase out broadband, television and fixed telephony services over its copper network. This is connected to the rapid expansion of the fiber-optic network.

KPN and VodafoneZiggo continue to be the largest providers of broadband connections with market shares of 35 to 45 percent. In the first quarter of 2021, T-Mobile's market share was between 5 and 10 percent, and that of Delta Fiber was between 0 and 5 percent.

Increase in mobile calls and data consumption

In the Netherlands, there are 22.3 million mobile connections. In early 2021, the number of mobile voice minutes increased by 6 percent to 13 billion minutes, and data consumption increased by 7 percent to 270 billion MB. The number of text messages continues to go down. In the first quarter, approximately 600,00 text messages were sent, which is a decrease of 6 percent.

Remarks and corrections

(Dutch)

Meerdere partijen hebben correcties doorgevoerd in de gegevens die eerder aan de ACM zijn opgeleverd. Hieronder een overzicht van alle wijzigingen die naar aanleiding hiervan in deze publicatie van de Telecommonitor zijn aangebracht. Mede naar aanleiding van de veranderingen in de telecommarkt en van de reacties van deelnemende marktpartijen, gaat de ACM het ontwerp van de telecommonitor binnenkort actualiseren. Hiermee hoopt de ACM ook het aantal correcties in de toekomst te kunnen beperken.

Mobiel

- **Retailmarktaandeel obv aansluitingen (p.7):** Correctie voor het marktaandeel T-Mobile voor de periode Q4 2020. Deze is naar beneden bijgesteld waardoor het marktaandeel in een lagere bandbreedte valt.
- **Retailvolume data (p.9):** 4G dataverbruik is voor de periode van Q4 2020 en eerder naar beneden bijgesteld; 3G dataverbruik is voor de periode vanaf Q3 2020 naar boven bijgesteld.

Breedband

- **Lage kwaliteit WBT aansluitingen (p.31):** Voor de periode van Q4 2020 en eerder heeft er een correctie plaatsgevonden in de aantallen lage kwaliteit WBT aansluitingen.
- **Huishoudens aangesloten op upgraded koper (p.35):** Het aantal aansluitingen *Homes activated upgraded koper vanaf de straatkast* is voor de periode van Q4 2020 en eerder naar beneden bijgesteld.

Zakelijke netwerkdiensten

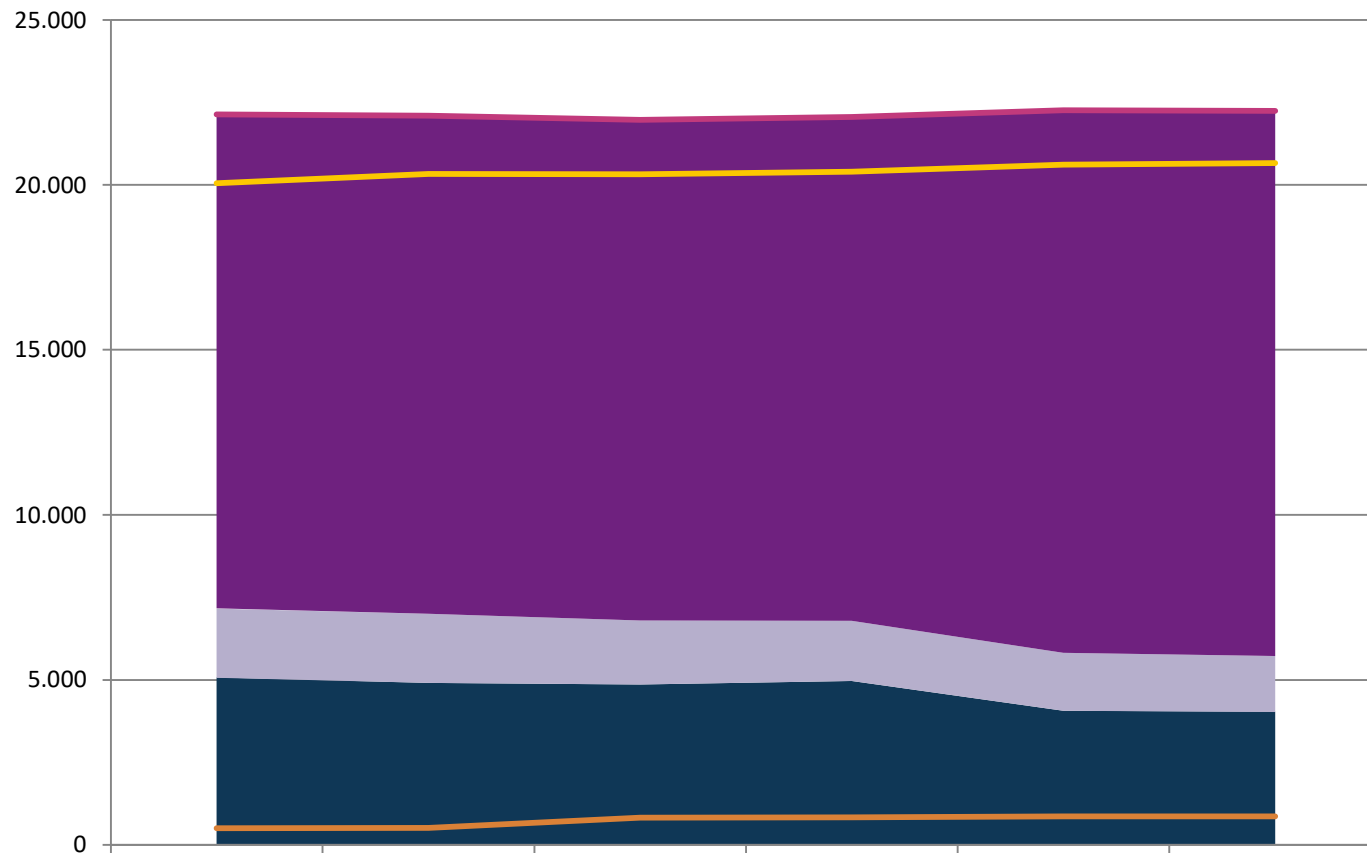
- **Wholesale zakelijke glasaansluitingen (p.38):** Voor de periode van Q4 2020 en eerder heeft er een correctie plaatsgevonden in de aantallen ODF (FttO) aansluitingen.
- **Wholesale HWT en huurlijnen:** Naar aanleiding van het geconsulteerde ontwerp marktanalysebesluit hoogwaardige wholesaletoeegang (HWT) van de ACM, hebben enkele partijen de eerder ten behoeve van de Telecommonitor aangeleverde gegevens herzien. De ACM is nog bezig met het onderzoek van de nieuwe gegevens. In afwachting van de uitkomsten van dit onderzoek worden in deze rapportage van de Telecommonitor eenmalig geen cijfers en marktaandelen gepubliceerd van wholesale HWT en huurlijnen.

Mobile

Retail connections



Aantal aansluitingen x 1.000



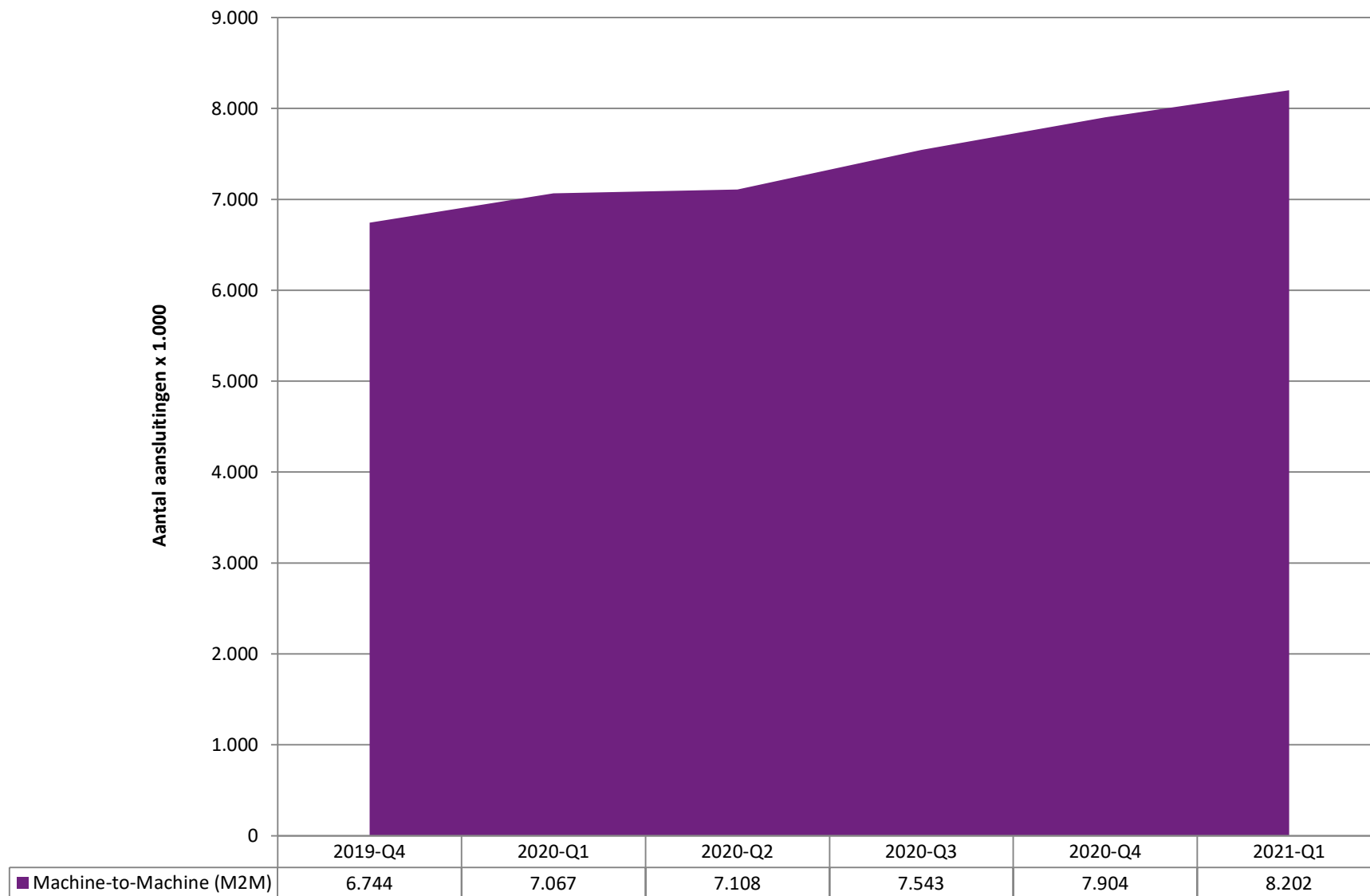
	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4	2021-Q1
Postpaid MNO	14.975	15.097	15.186	15.273	16.450	16.520
Prepaid MNO	2.093	2.095	1.932	1.825	1.756	1.698
Postpaid and prepaid MVNO	5.070	4.910	4.862	4.962	4.065	4.029
Total mobile connections	22.138	22.102	21.979	22.059	22.270	22.247
Of which bundled (data and speech)	20.051	20.333	20.323	20.403	20.610	20.661
Of which data only connections	505	512	821	832	855	864

* Door de overname van Simpel door T-Mobile zijn het aantal aansluitingen Postpaid MNO met ca. 1 miljoen toegenomen (Post- en Prepaid MVNO met ca. 1 miljoen afgenomen).

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

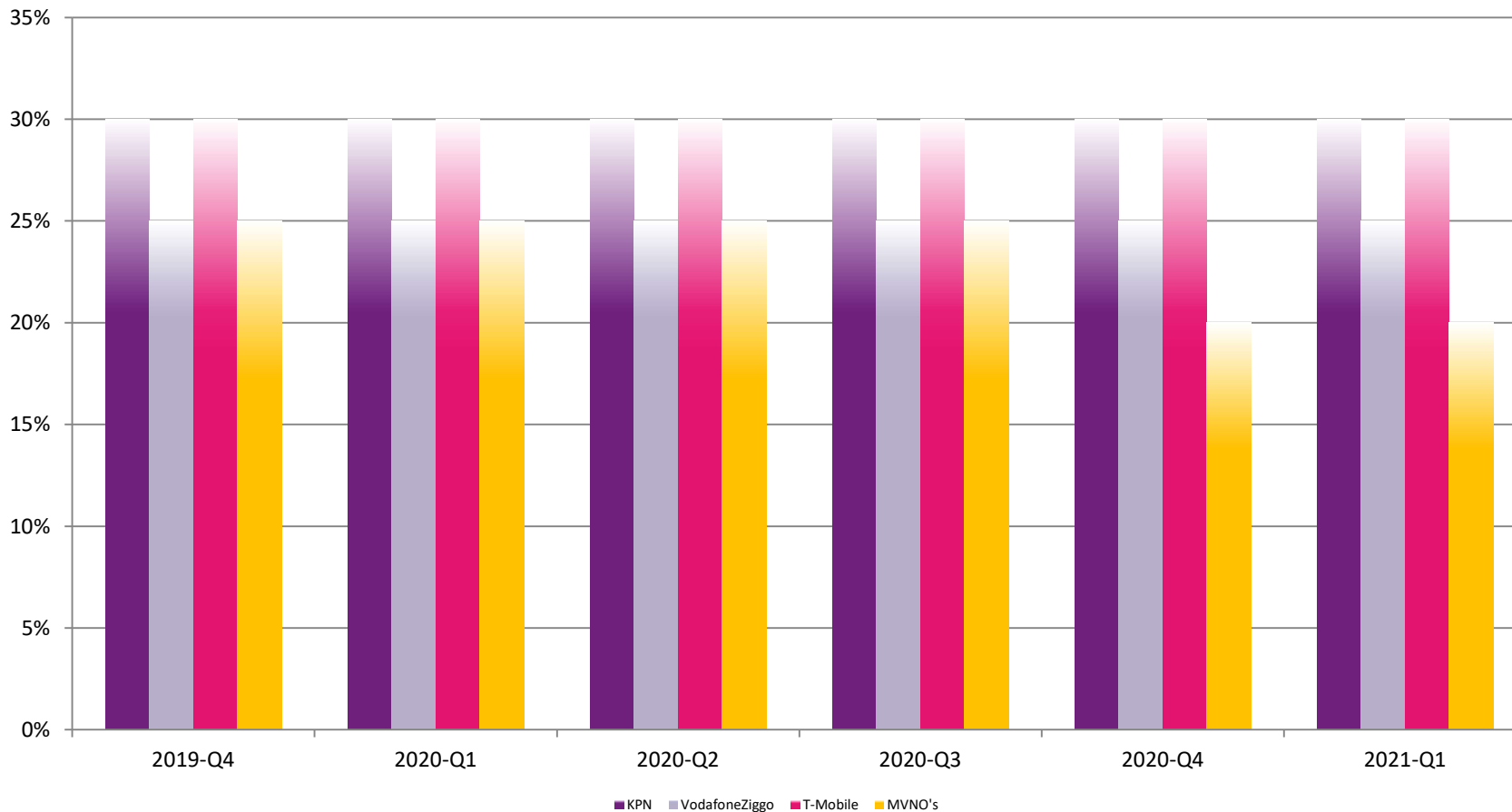
Machine-to-Machine connections



Op basis van vragen 10_A1_4_1 van de Telecommonitor

Mobile

Retail market share based on connections



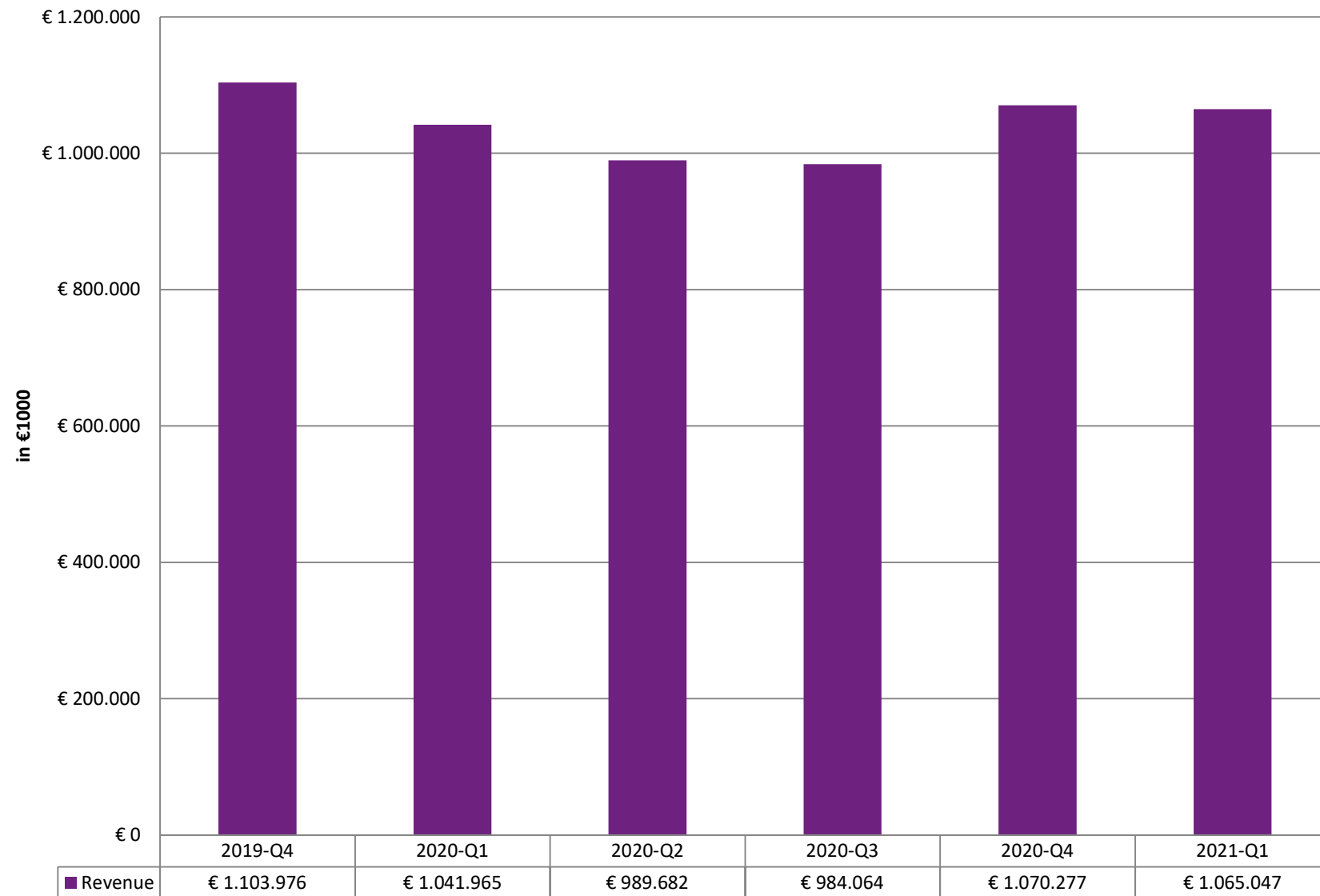
	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4	2021-Q1
KPN	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
VodafoneZiggo	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]
T-Mobile	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
MVNO's	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[15 - 20%]	[15 - 20%]

* Correctie voor het marktaandeel T-Mobile voor de periode Q4 2020. Deze is naar beneden bijgesteld waardoor het marktaandeel in een lagere bandbreedte valt.

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

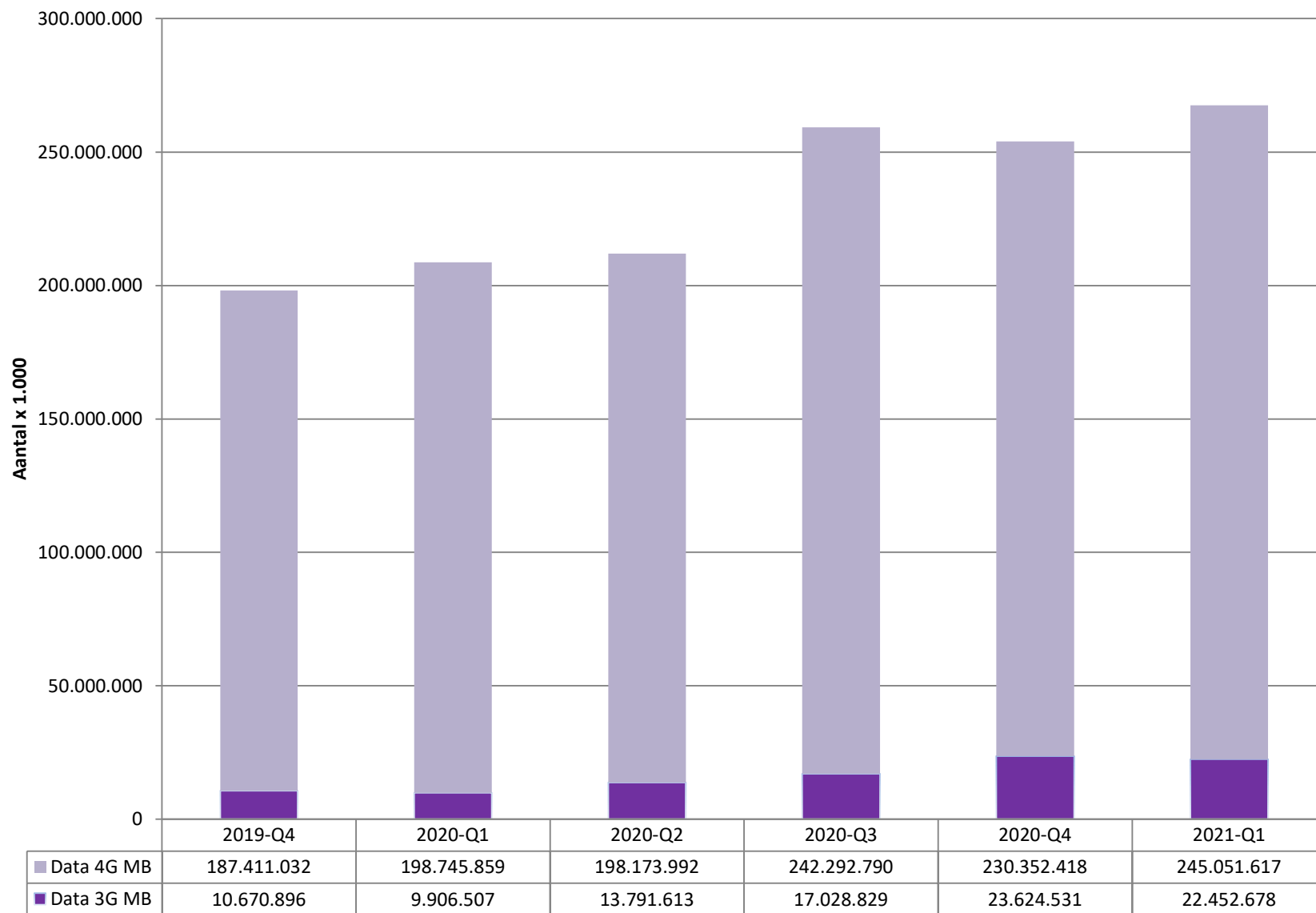
Retail revenue of Mobile Network Operators (MNOs)



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 3G/4G data

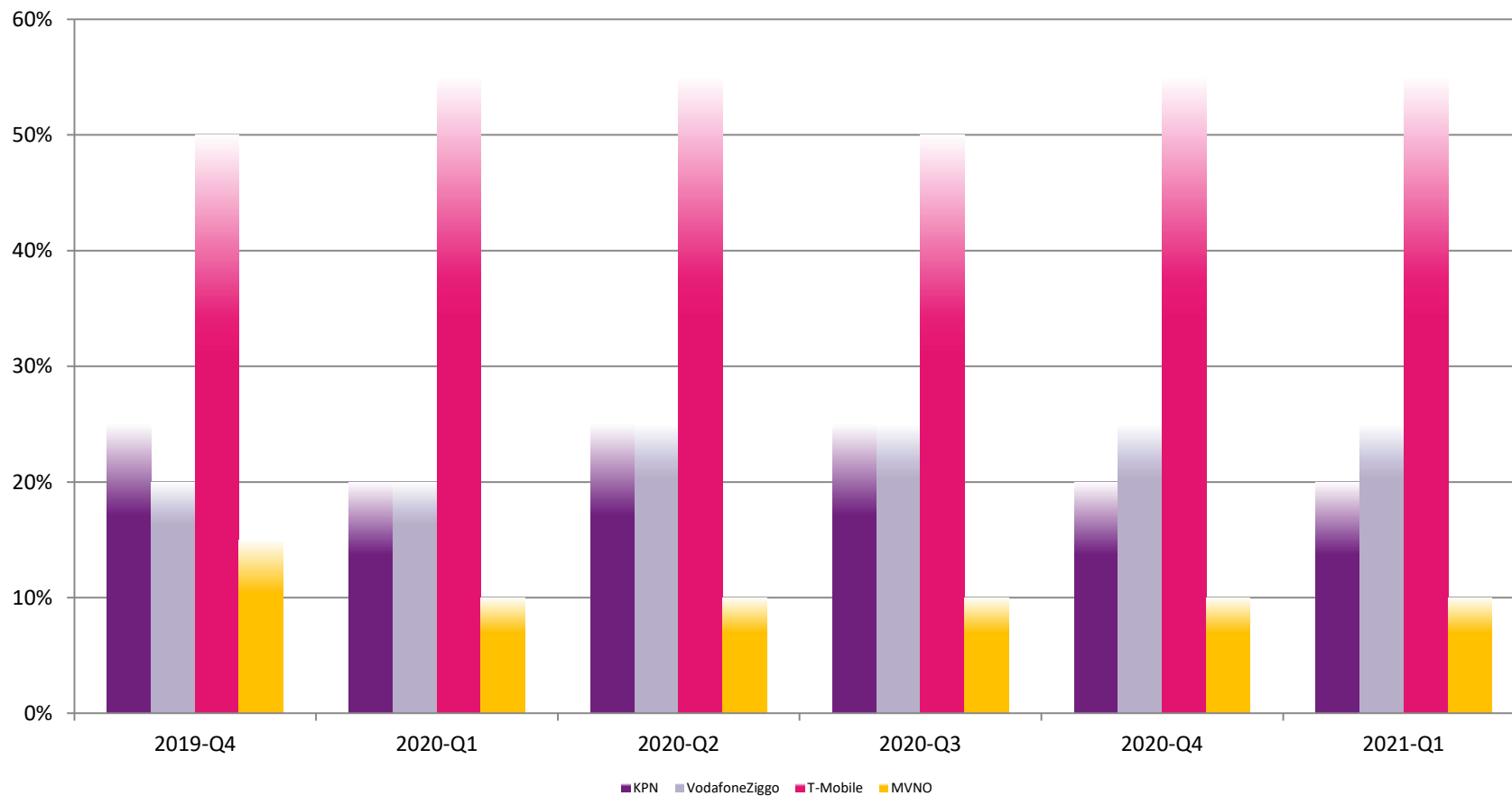


* 4G dataverbruik is voor de periode van Q4 2020 en eerder naar beneden bijgesteld; 3G dataverbruik is voor de periode vanaf Q3 2020 naar boven bijgesteld.

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



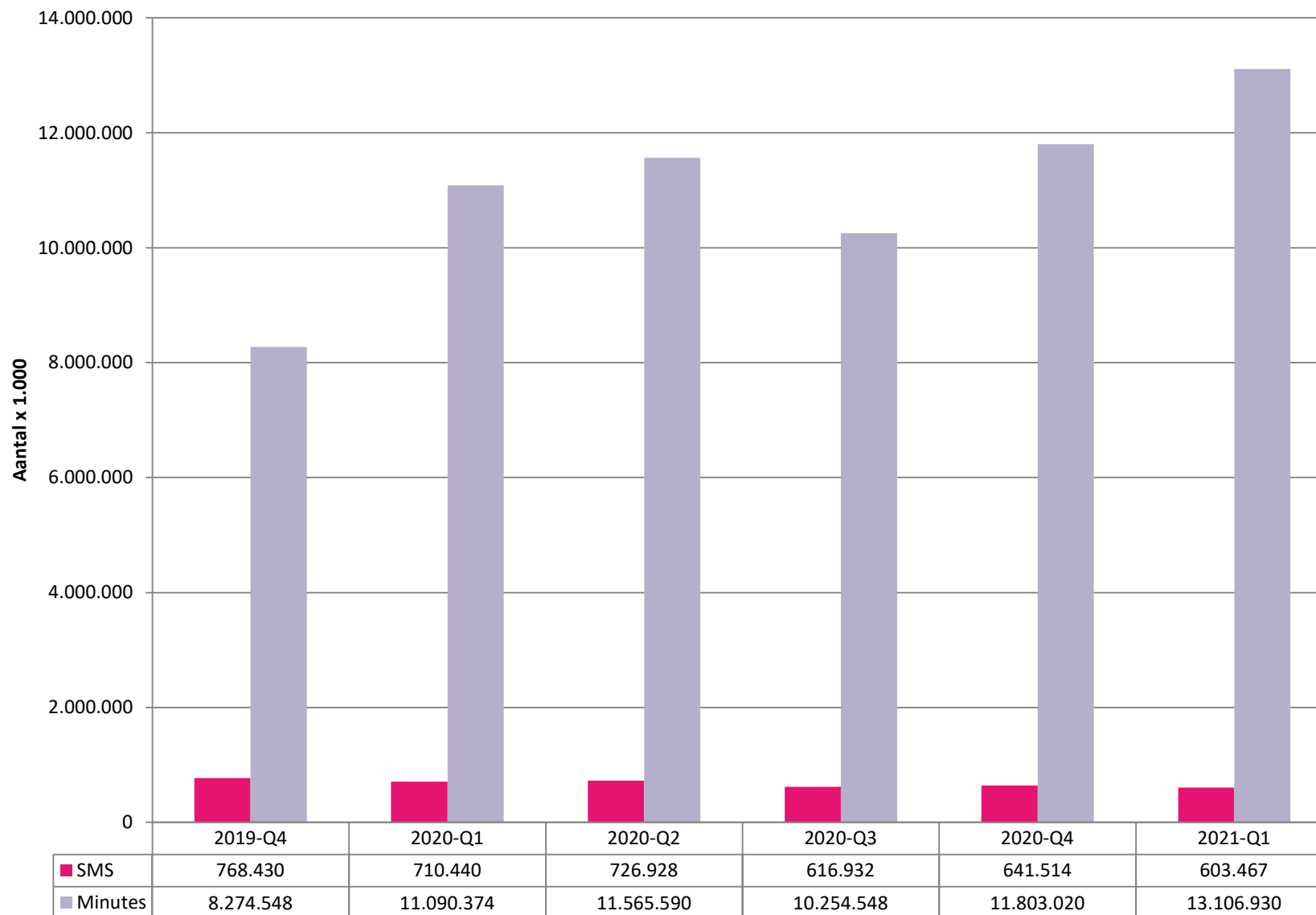
	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4	2021-Q1
KPN	[20 - 25%]	[15 - 20%]	[20 - 25%]	[20 - 25%]	[15 - 20%]	[15 - 20%]
VodafoneZiggo	[15 - 20%]	[15 - 20%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]
T-Mobile	[45 - 50%]	[50 - 55%]	[50 - 55%]	[45 - 50%]	[50 - 55%]	[50 - 55%]
MVNO	[10 - 15%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]

* 4G dataverbruik is voor de periode van Q4 2020 en eerder naar beneden bijgesteld; 3G dataverbruik is voor de periode vanaf Q3 2020 naar boven bijgesteld.

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

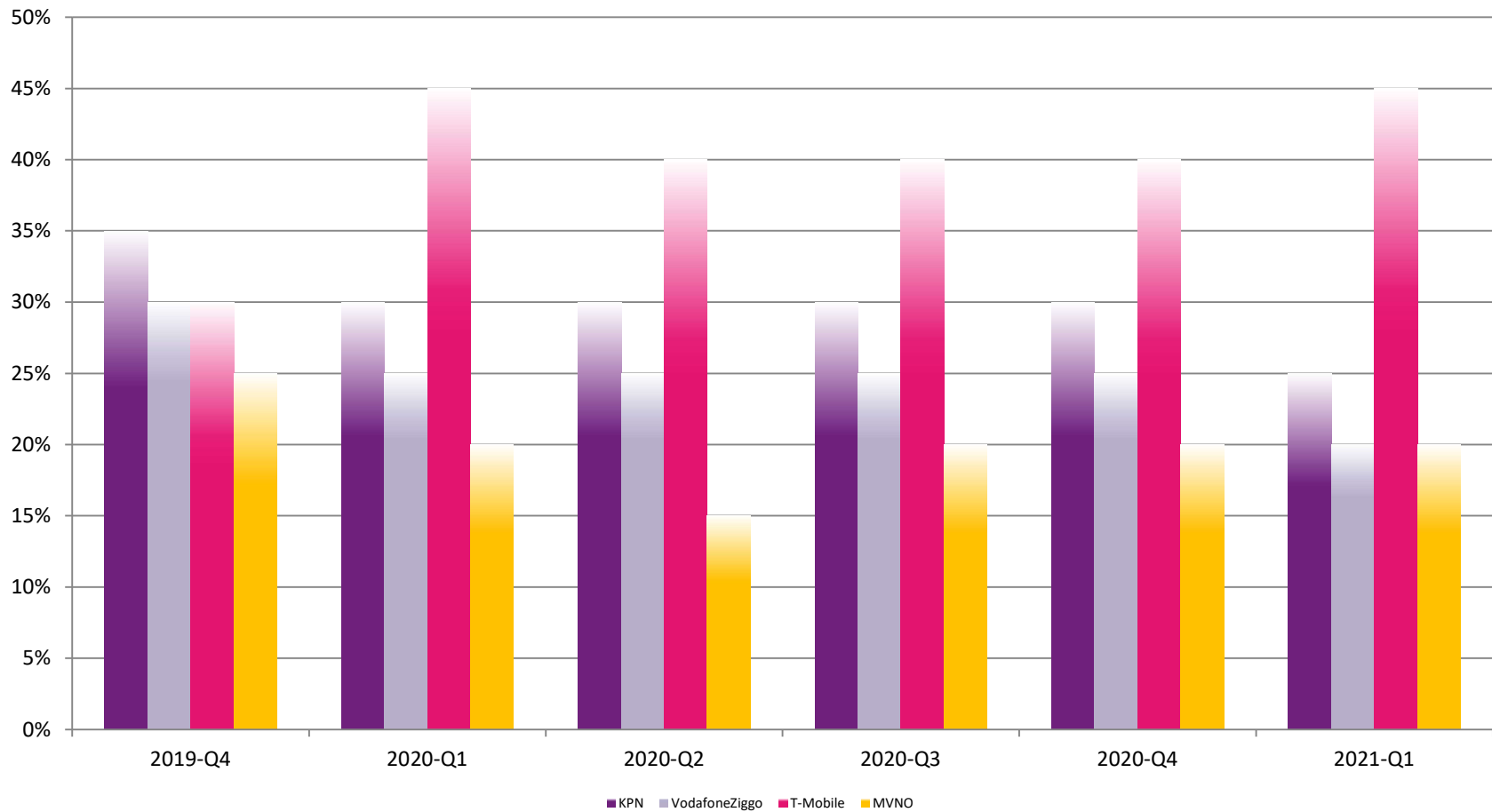
Retail volume of voice minutes and SMS/text



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 consumed voice minutes

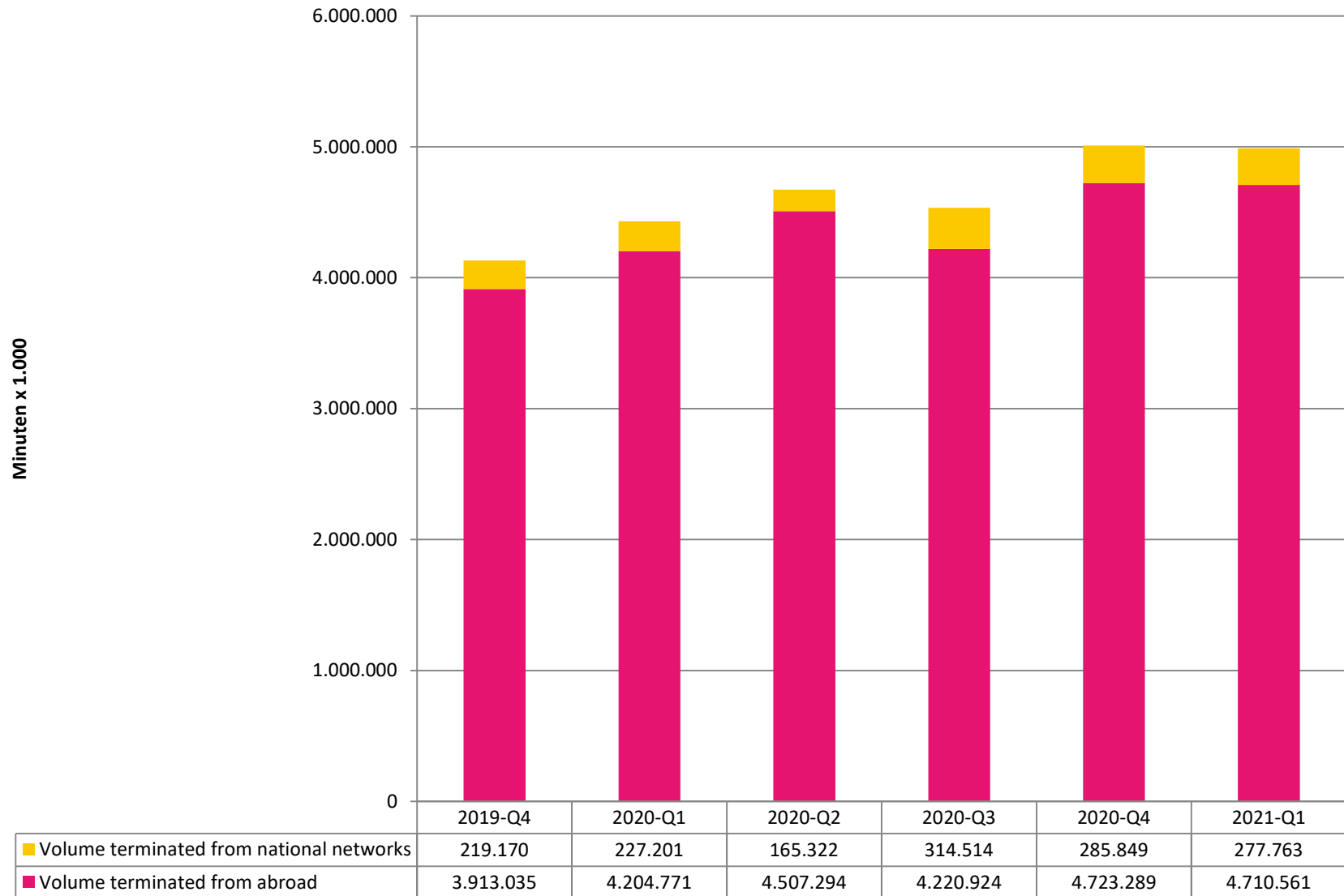


	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4	2021-Q1
KPN	[30 - 35%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[20 - 25%]
VodafoneZiggo	[25 - 30%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[15 - 20%]
T-Mobile	[25 - 30%]	[40 - 45%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[40 - 45%]
MVNO	[20 - 25%]	[15 - 20%]	[10 - 15%]	[15 - 20%]	[15 - 20%]	[15 - 20%]

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

Mobile

Wholesale volume of call termination (excluding onnet)



Fixed telephony

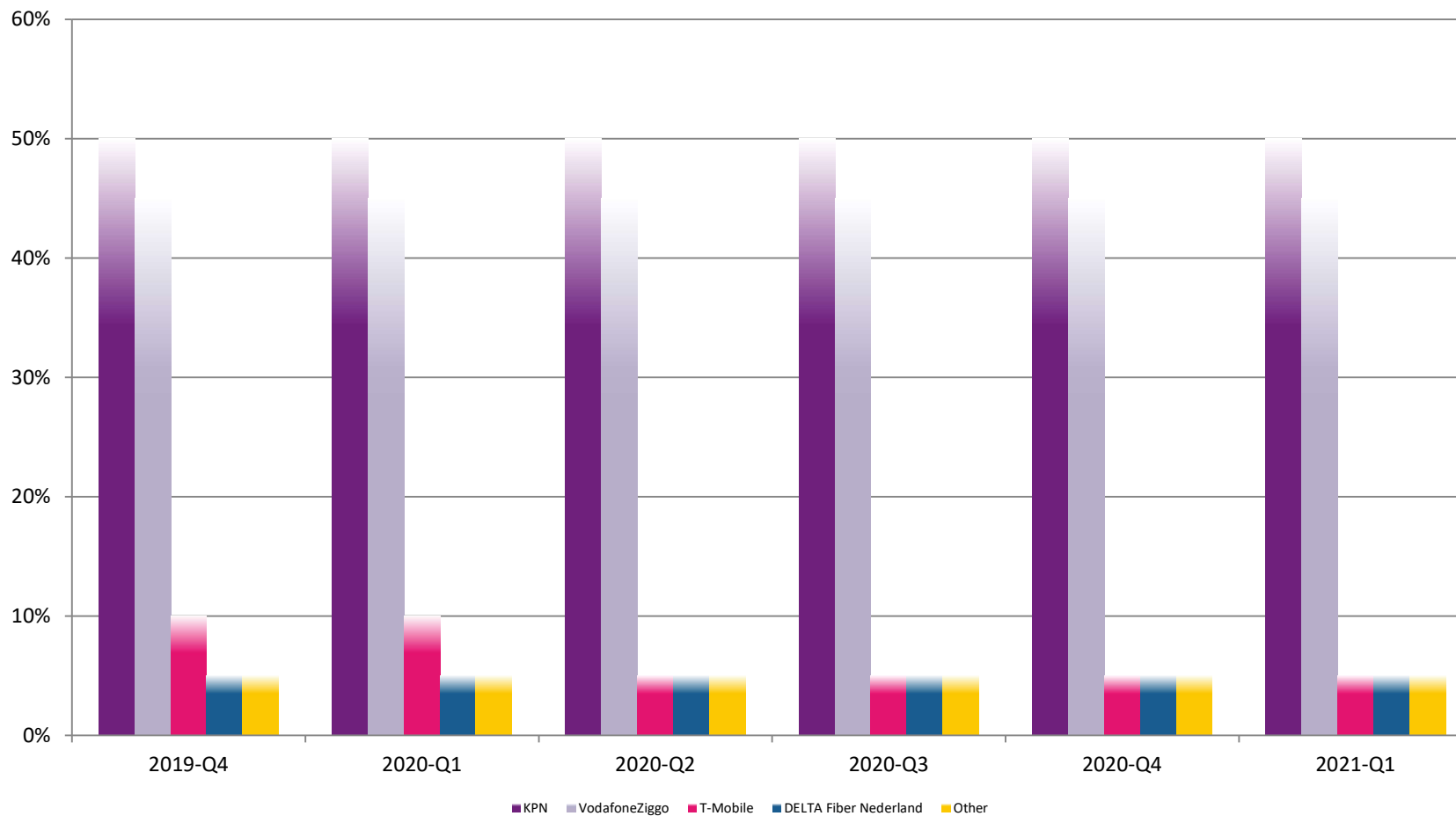
Retail single connections



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

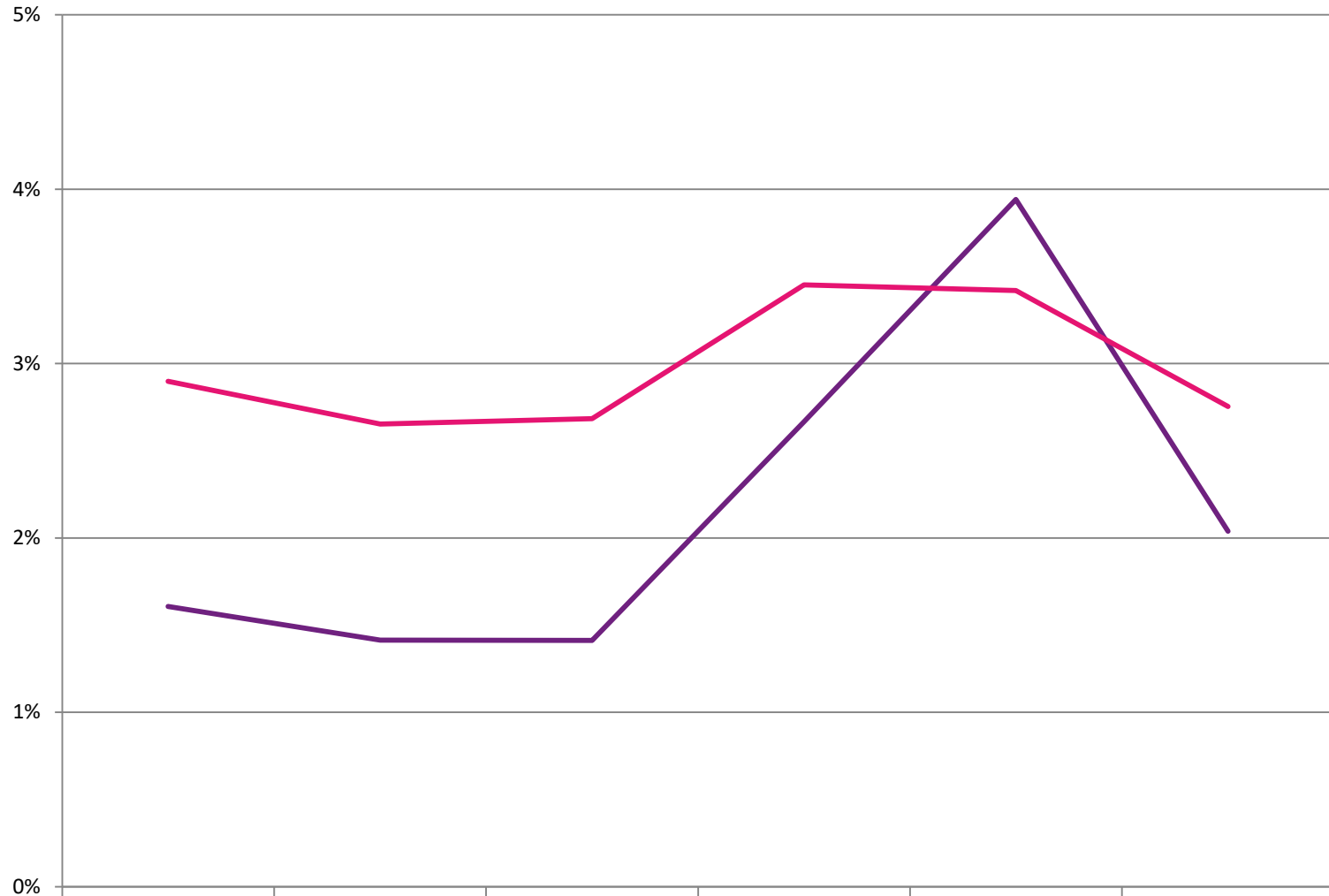


	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4	2021-Q1
KPN	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
VodafoneZiggo	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
T-Mobile	[5 - 10%]	[5 - 10%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 5%]	[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 20_A1_1_1-2-3-4-5-6 en 20_A1_7_1-2-3-4-5 van de Telecommonitor

Fixed telephony

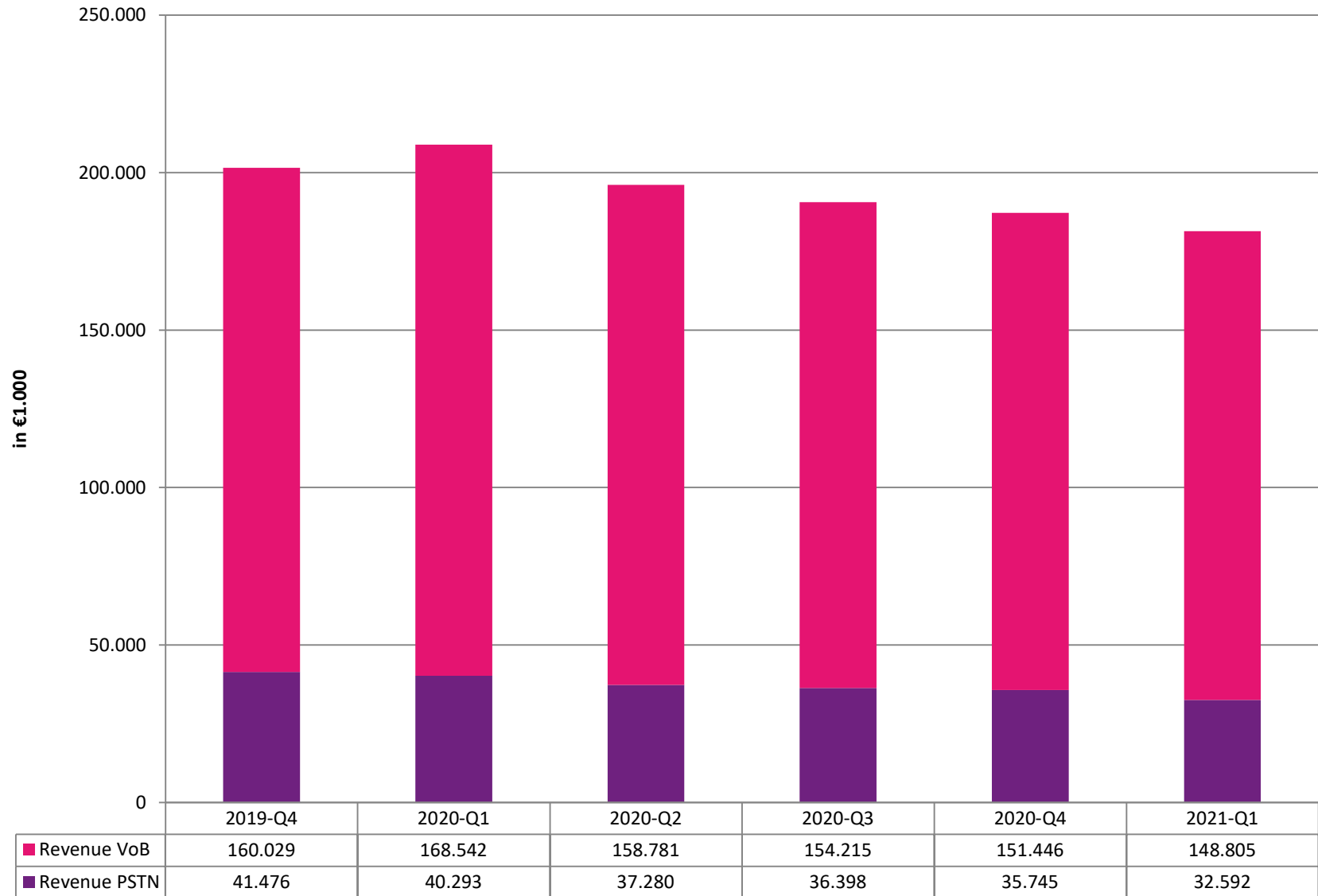
Retail churn of single connections



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

Fixed telephony

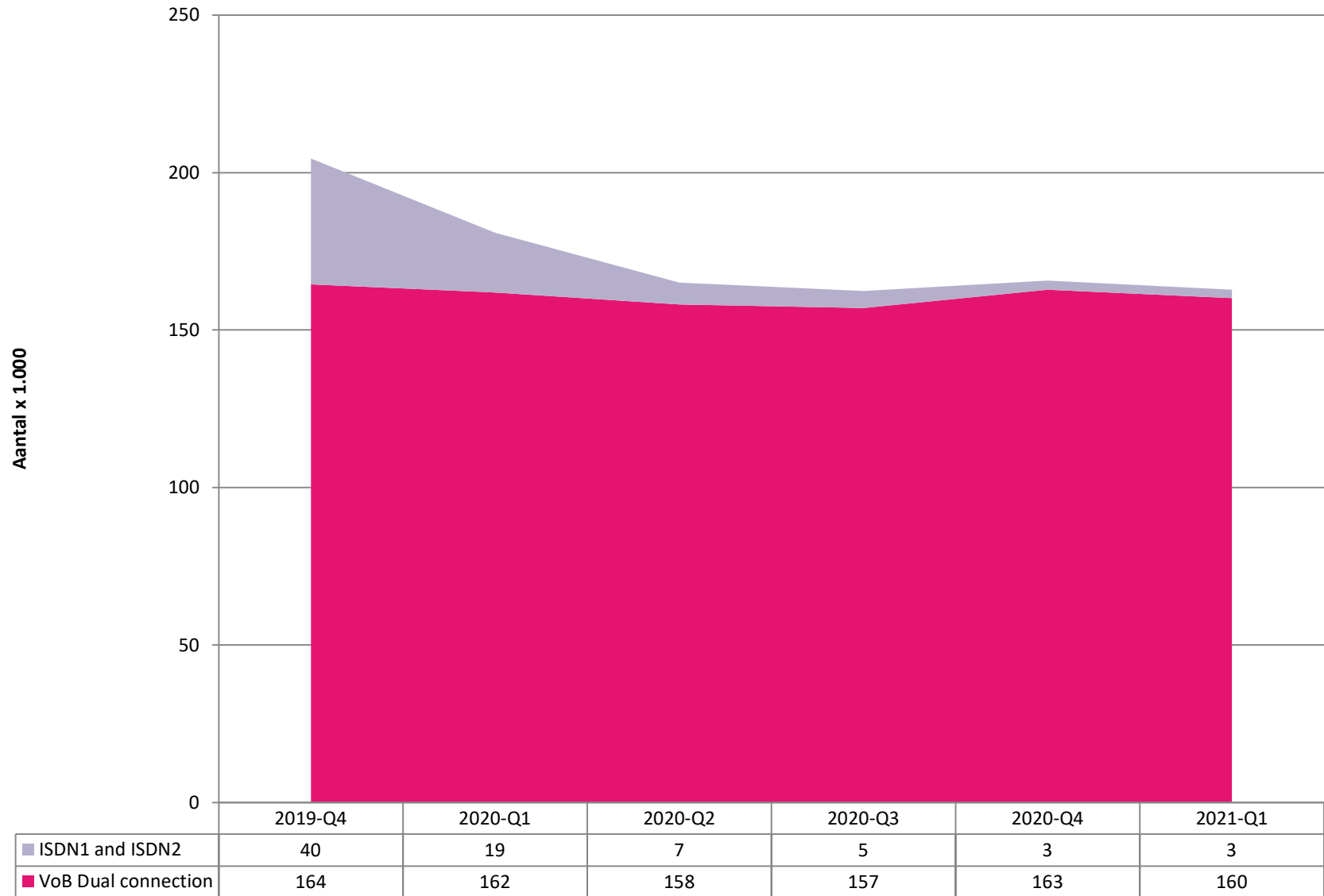
Retail turnover PSTN and VoB



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

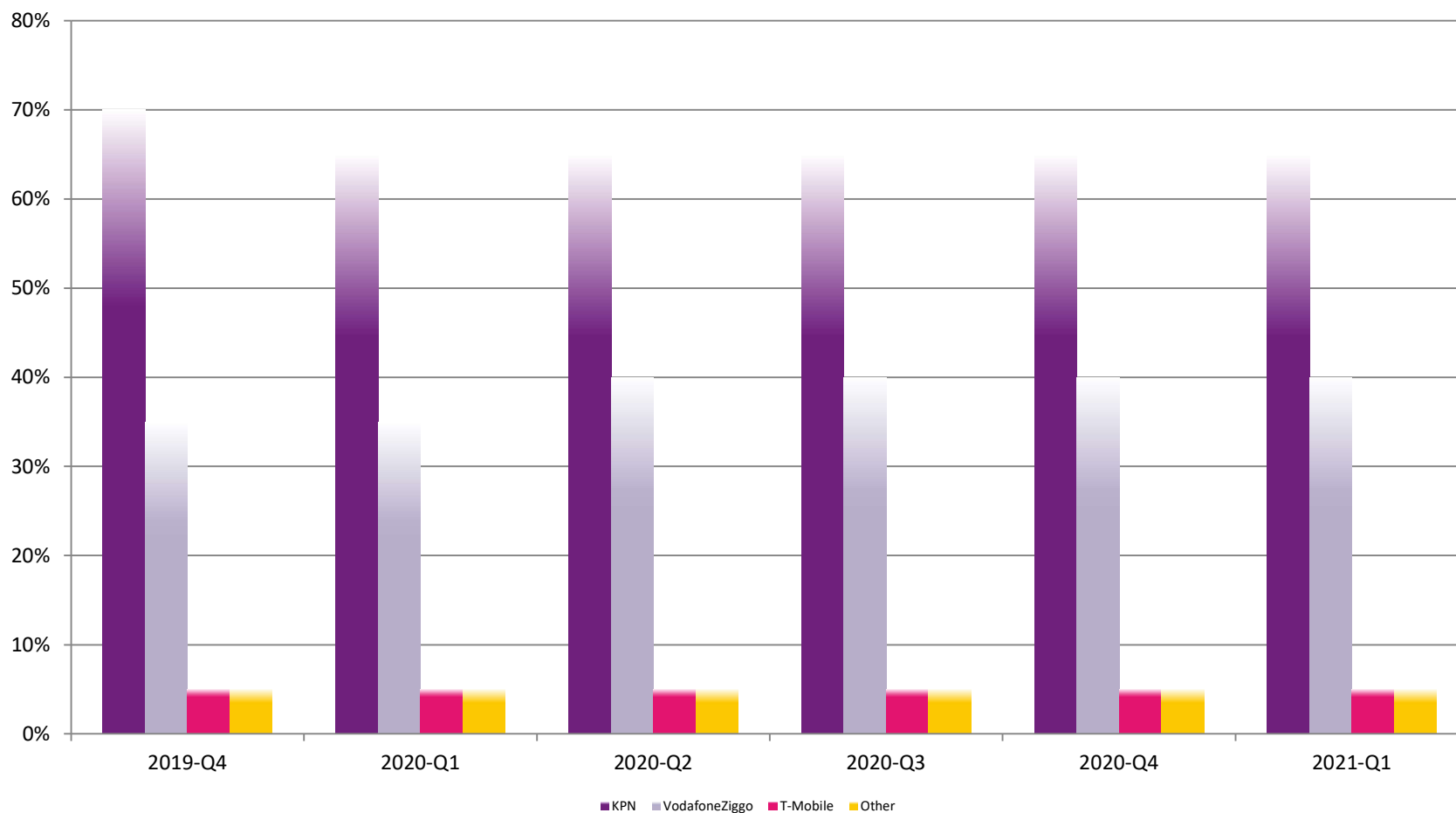
Retail dual connections



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-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4	2021-Q1
KPN	[65 - 70%]	[60 - 65%]	[60 - 65%]	[60 - 65%]	[60 - 65%]	[60 - 65%]
VodafoneZiggo	[30 - 35%]	[30 - 35%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[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%]

* In de Q4 2020 rapportage van de Telecommonitor stonden per abuis verkeerde marktaandeelen gerapporteerd. Deze zijn nu gecorrigeerd.

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

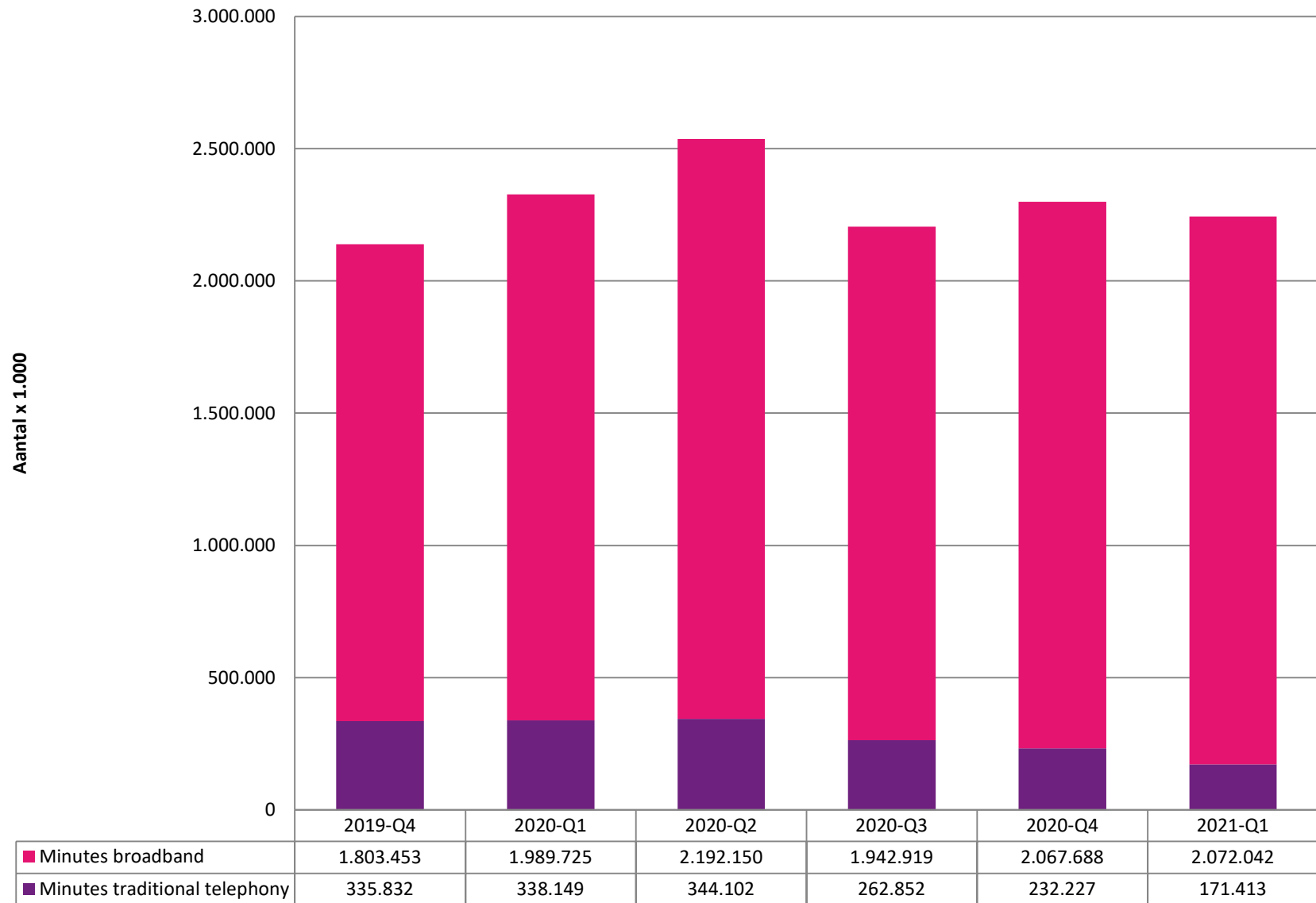


	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4	2021-Q1
— Adds	0,32%	0,44%	0,48%	1,97%	7,79%	1,12%
— Disconnects	12,75%	14,31%	7,68%	2,83%	9,95%	9,83%

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

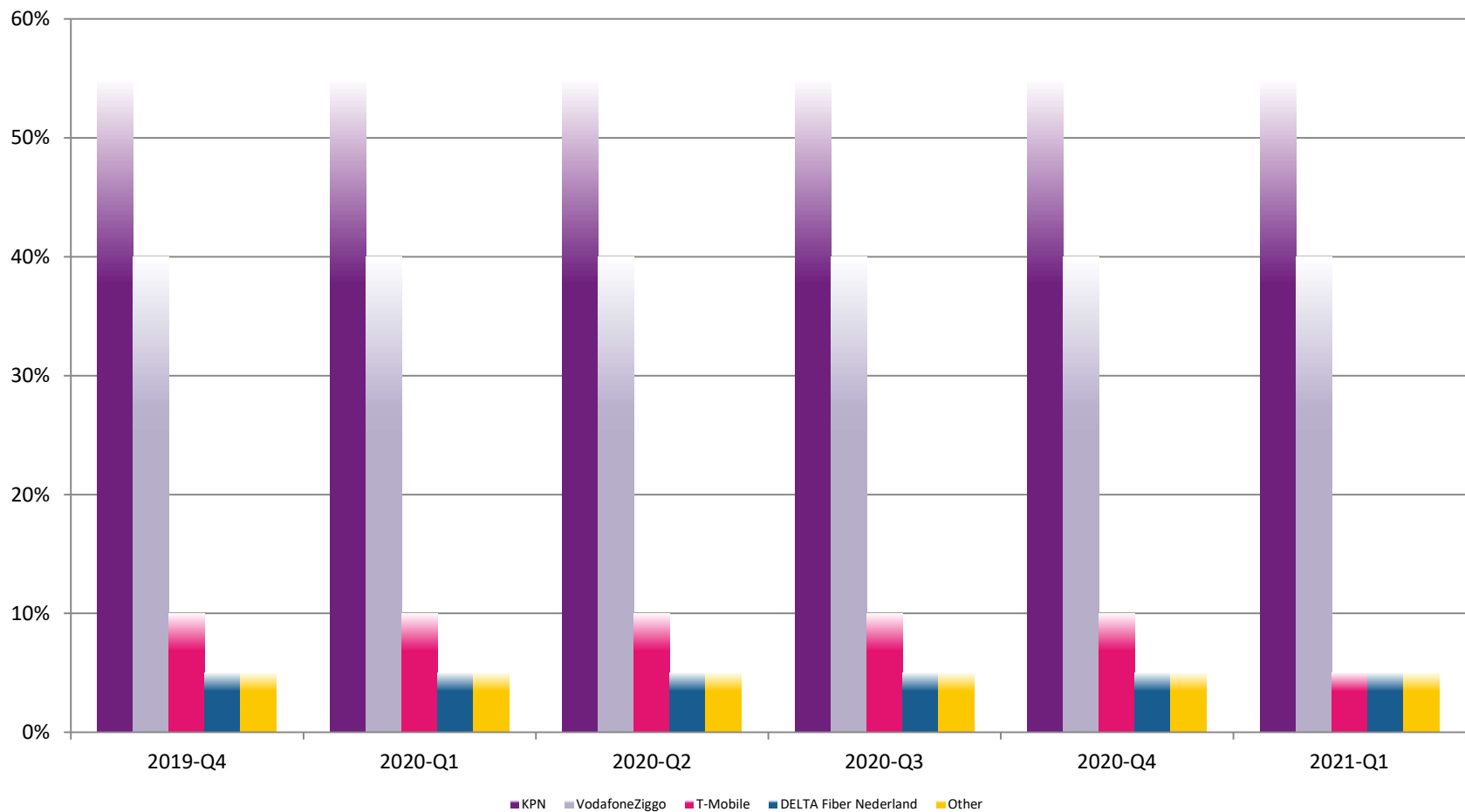
Retail volume based on voice minutes



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

Fixed telephony

Retail market share based on voice minutes

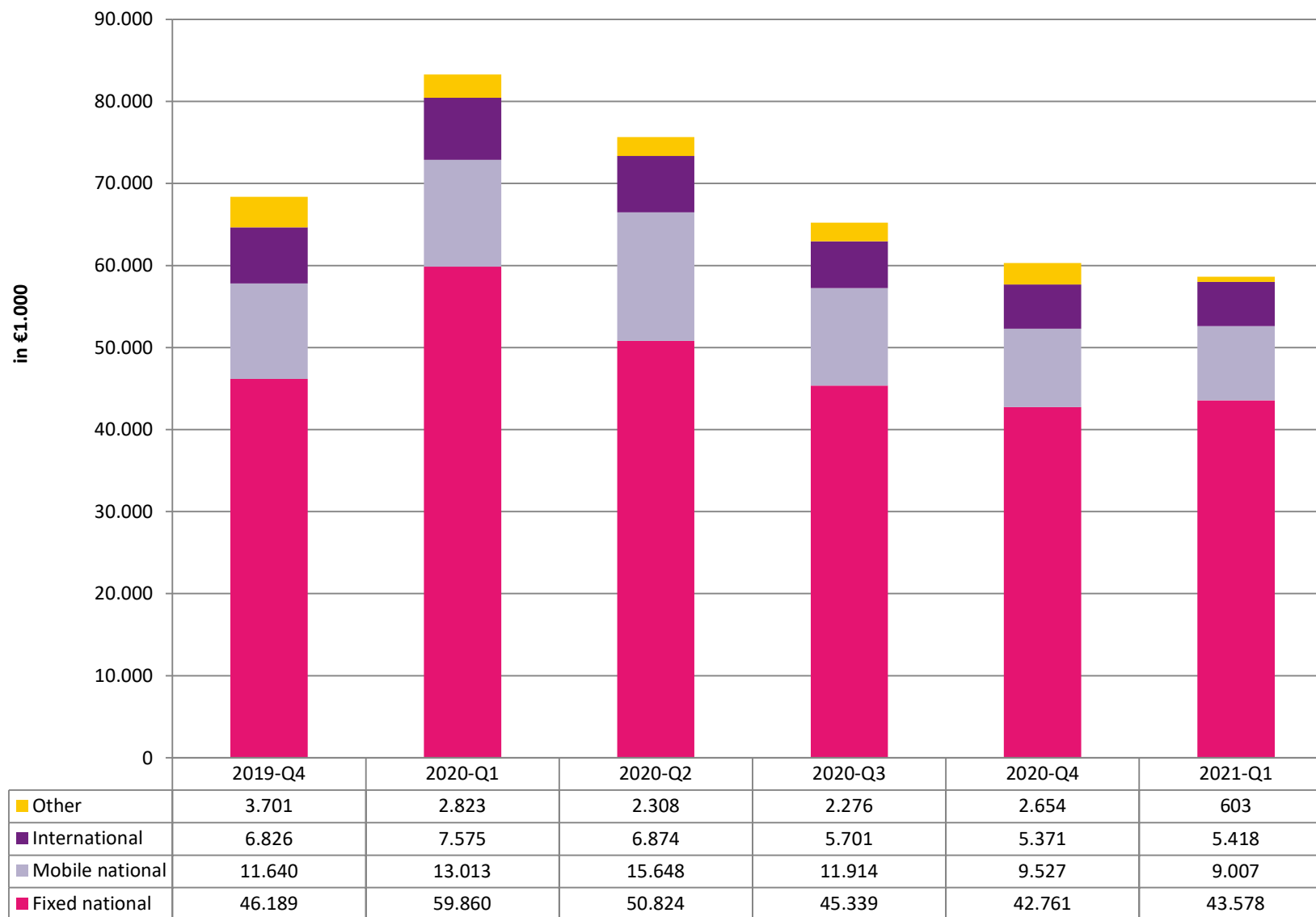


	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4	2021-Q1
KPN	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]
VodafoneZiggo	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[0 - 5%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 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_A4_2_1-2-3-4 van de Telecommonitor

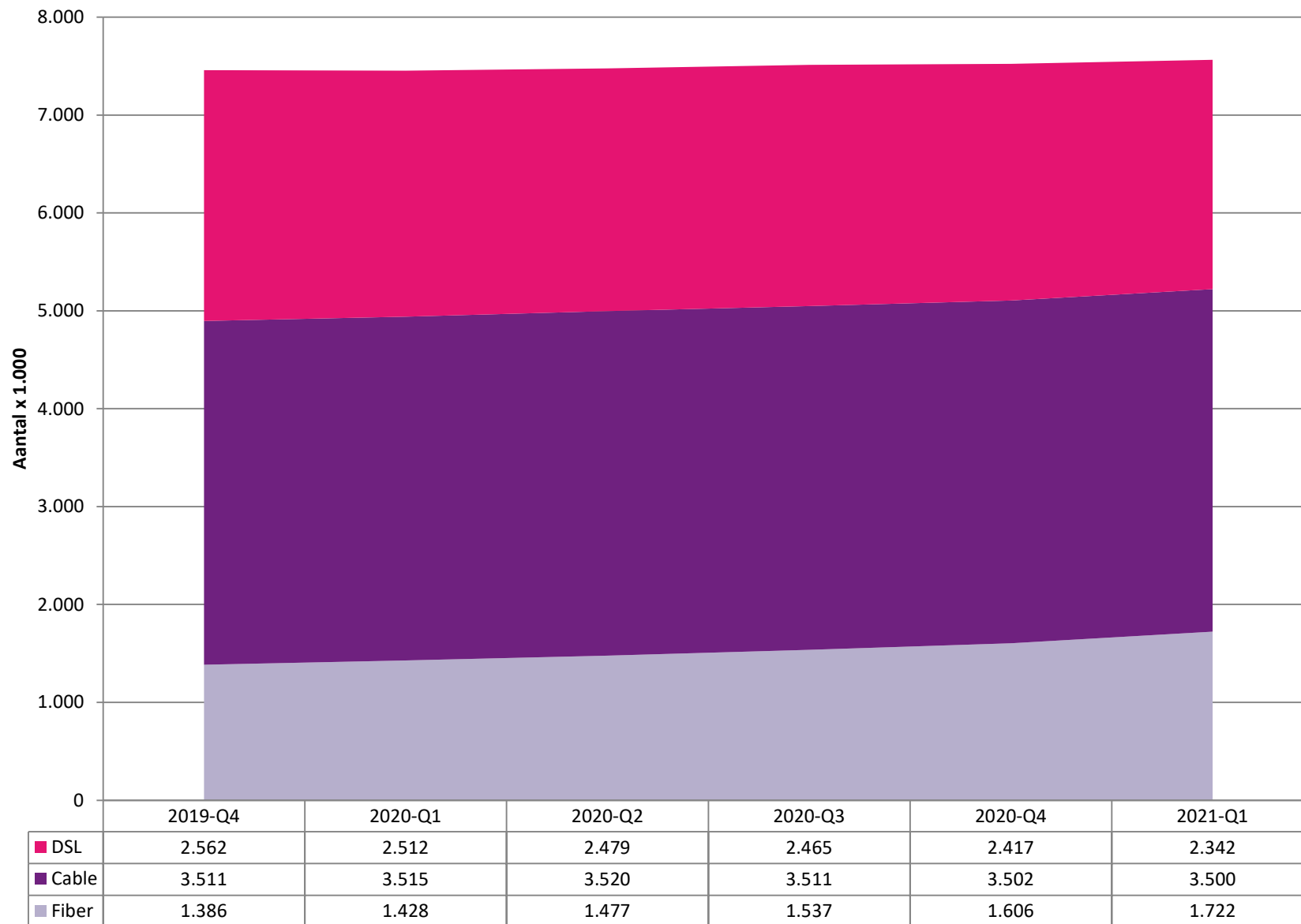
Fixed telephony

Retail turnover per type of traffic



Broadband

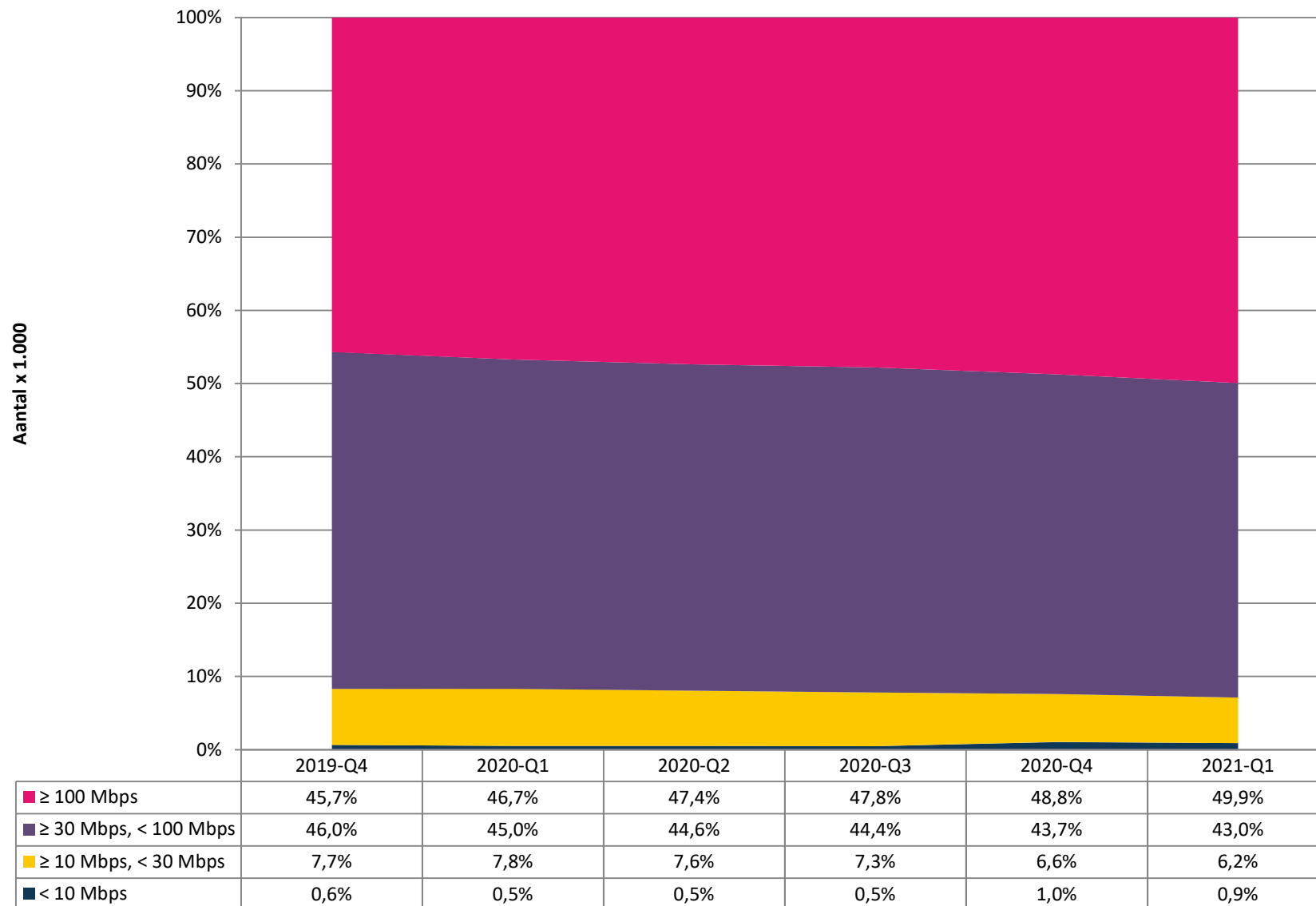
Retail connections per type



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. Glasvezel = breedbandinternet op basis van glasvezel ODF toegang (FtTH + FttO)

Broadband

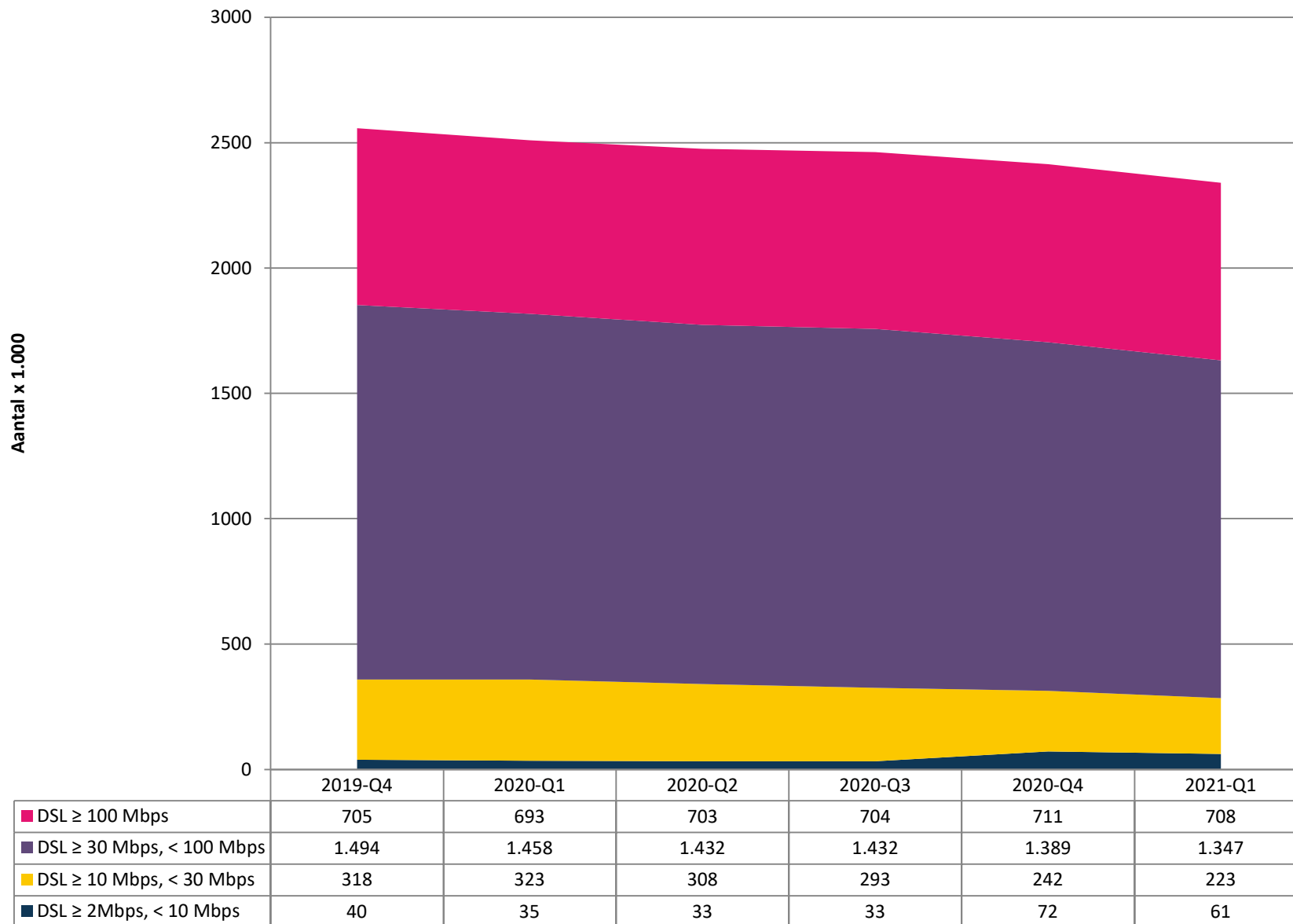
Percentage retail connections by speed



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

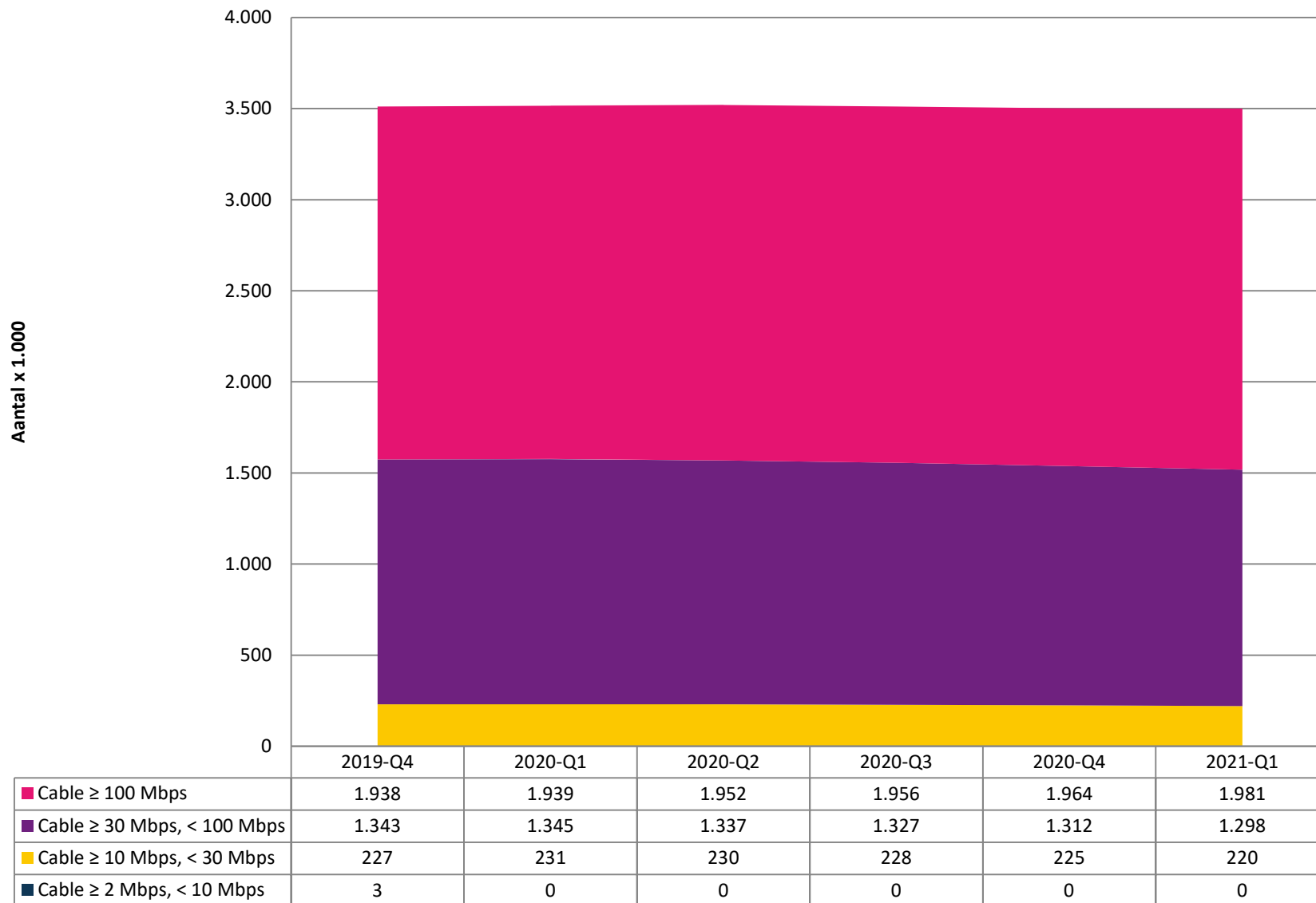
Retail DSL-connections by speed



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

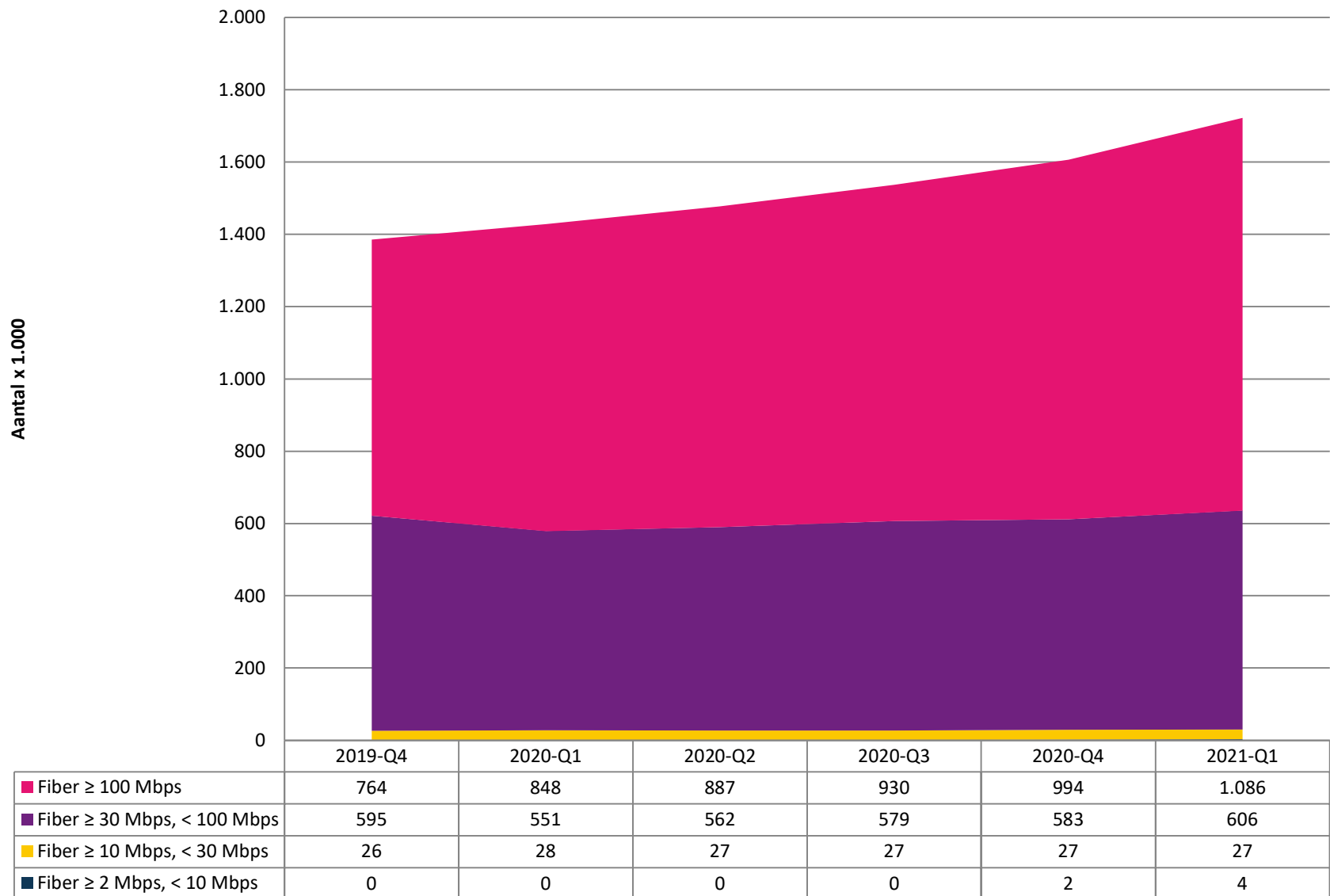
Retail cable connections by speed



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

Broadband

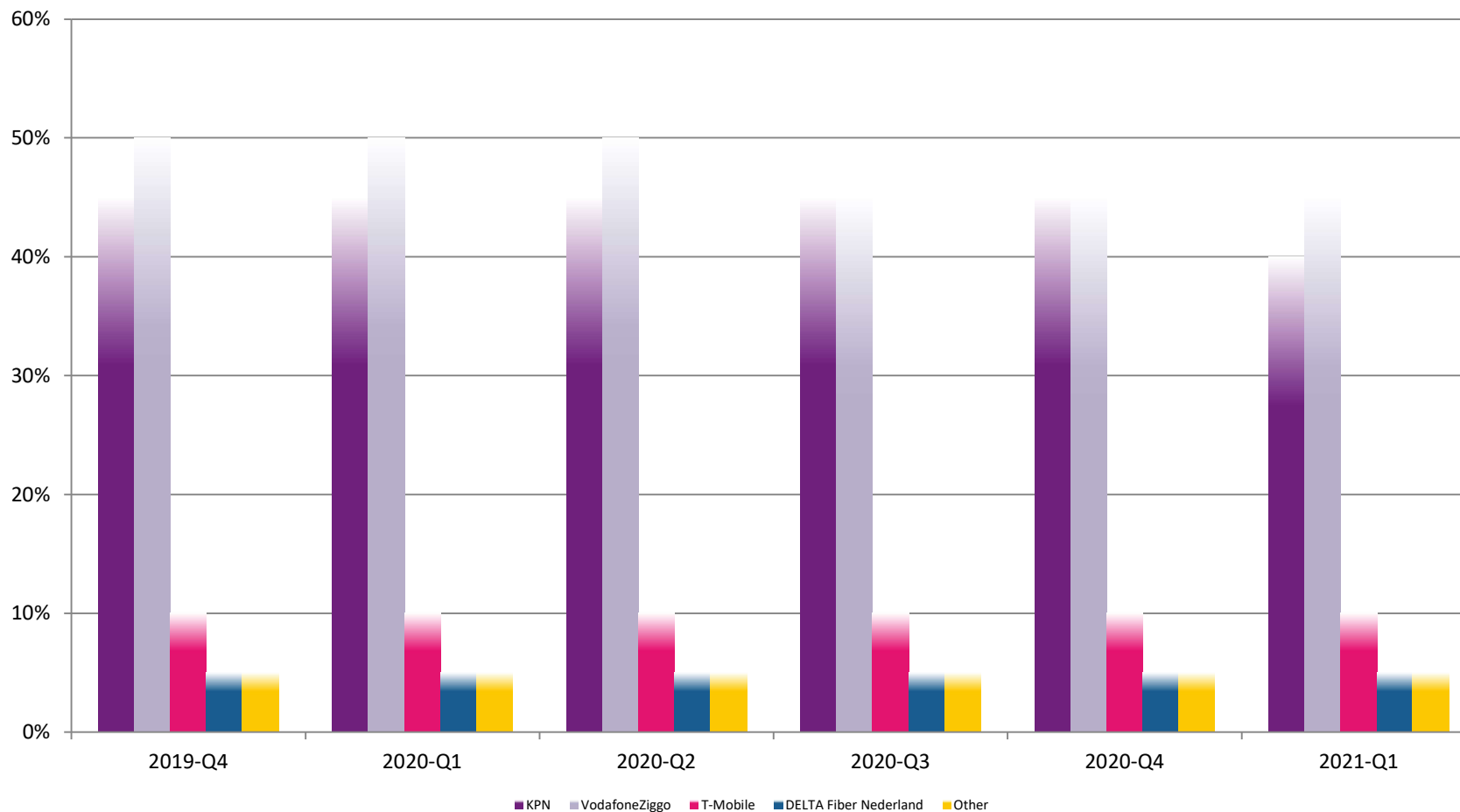
Retail fiber-optic connections by speed



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

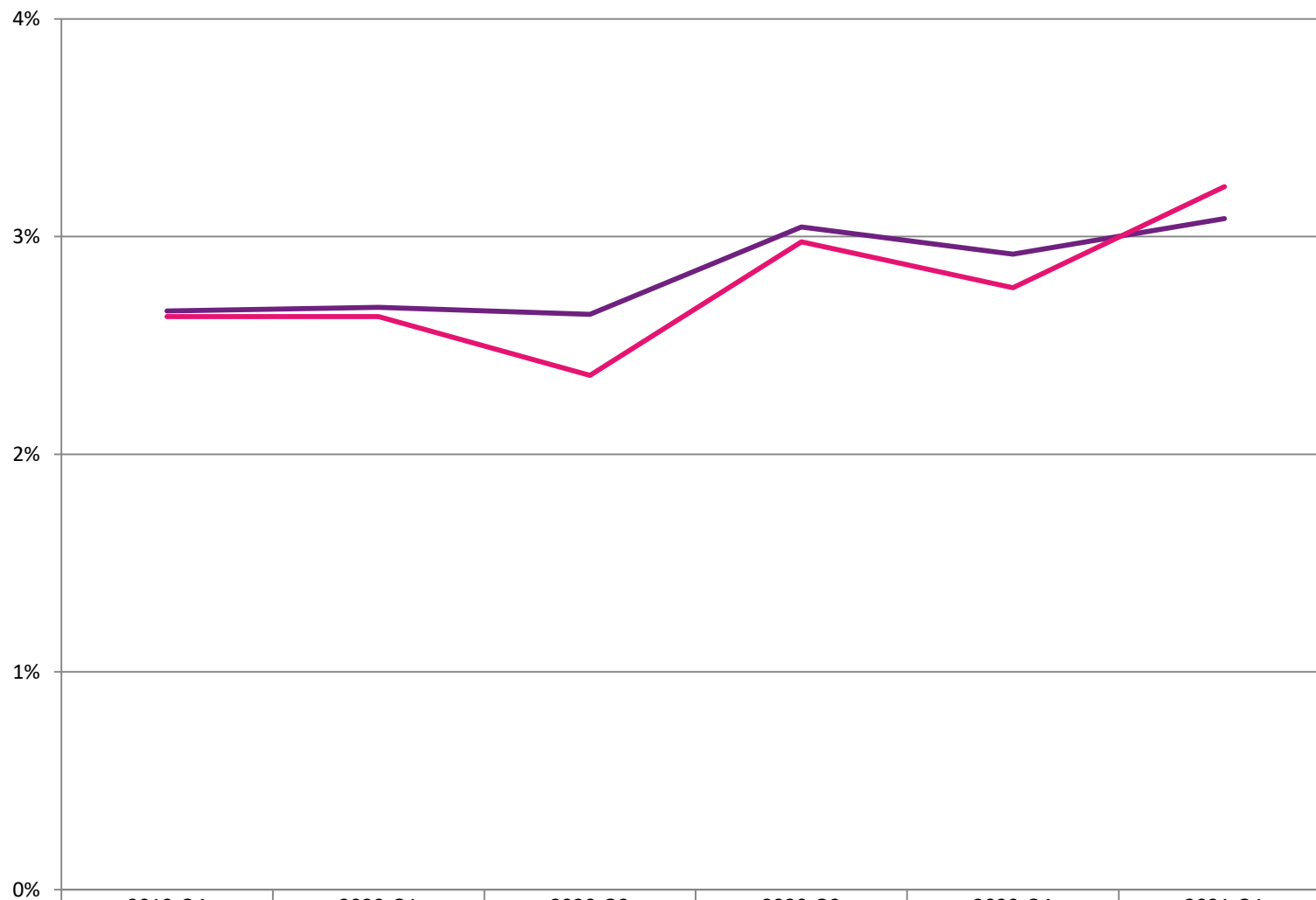


	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4	2021-Q1
KPN	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[35 - 40%]
VodafoneZiggo	[45 - 50%]	[45 - 50%]	[45 - 50%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 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

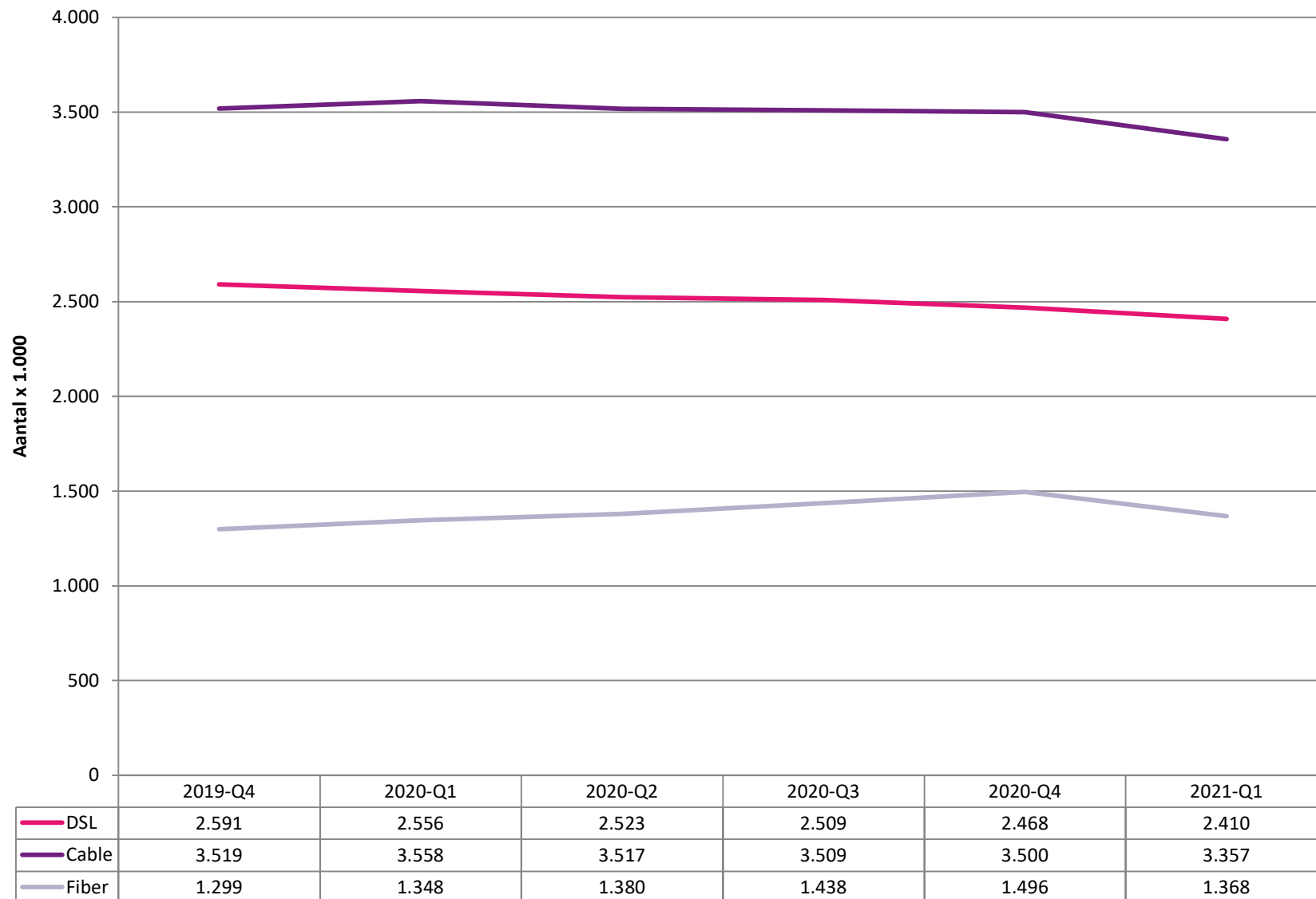
Retail churn based on connections



Op basis van vragen 30_A5_1_1-2, 30_A5_2_1-2, 30_A5_3_1-2, en 30_A5_4_1-2 van de Telecommonitor

Broadband

Low-quality WBT-connections



* De afname van aansluitingen voor lage kwaliteit WBT (kabel en glasvezel) in Q1 2021 is vanwege recente integratie van CIF en Rekam in Delta Fiber Nederland.

Daarnaast zijn voor de cijfers mbt DSL correcties doorgevoerd door KPN.

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

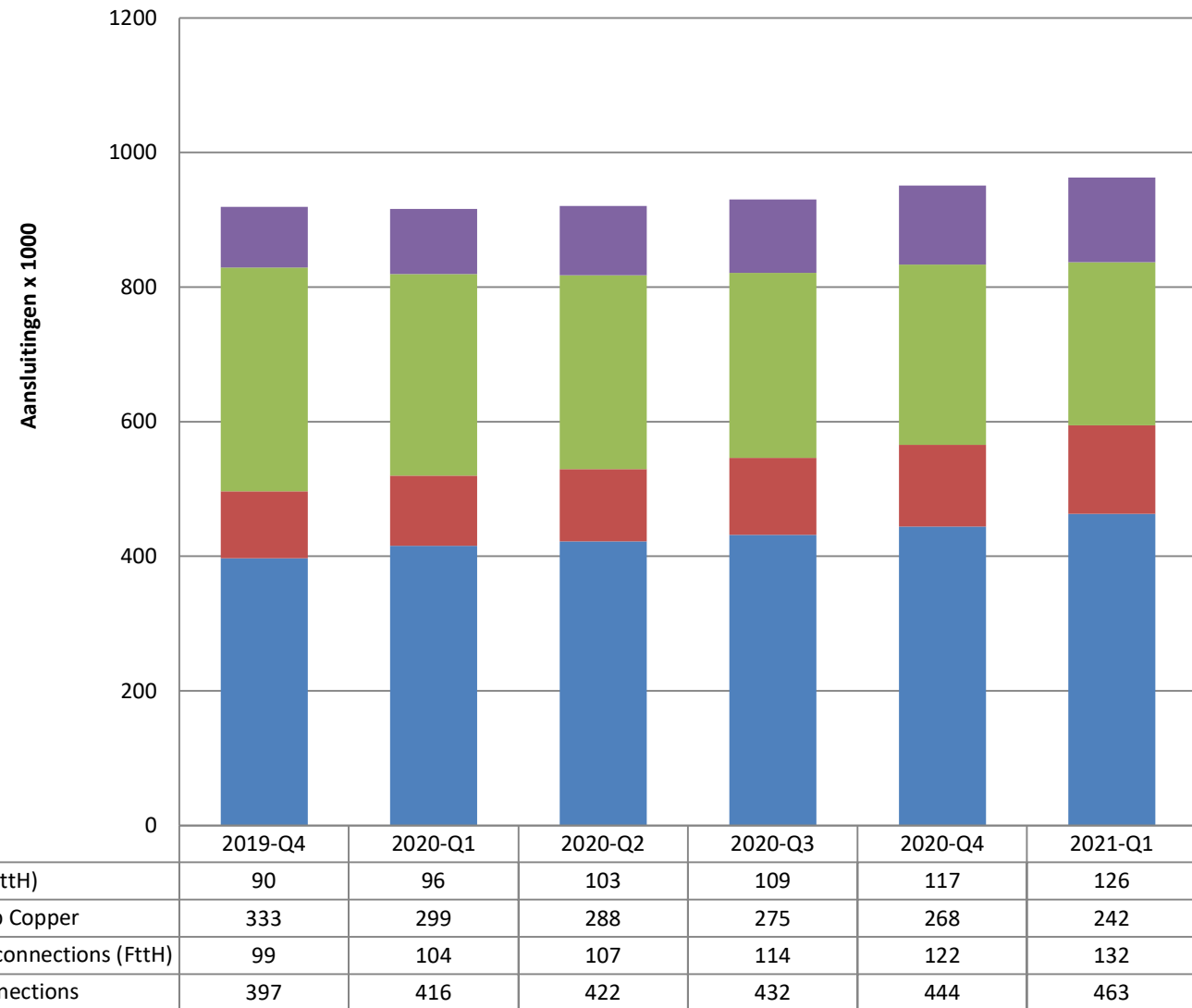


	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4	2021-Q1
KPN	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[50 - 55%]
VodafoneZiggo	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
T-Mobile	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 0%]

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

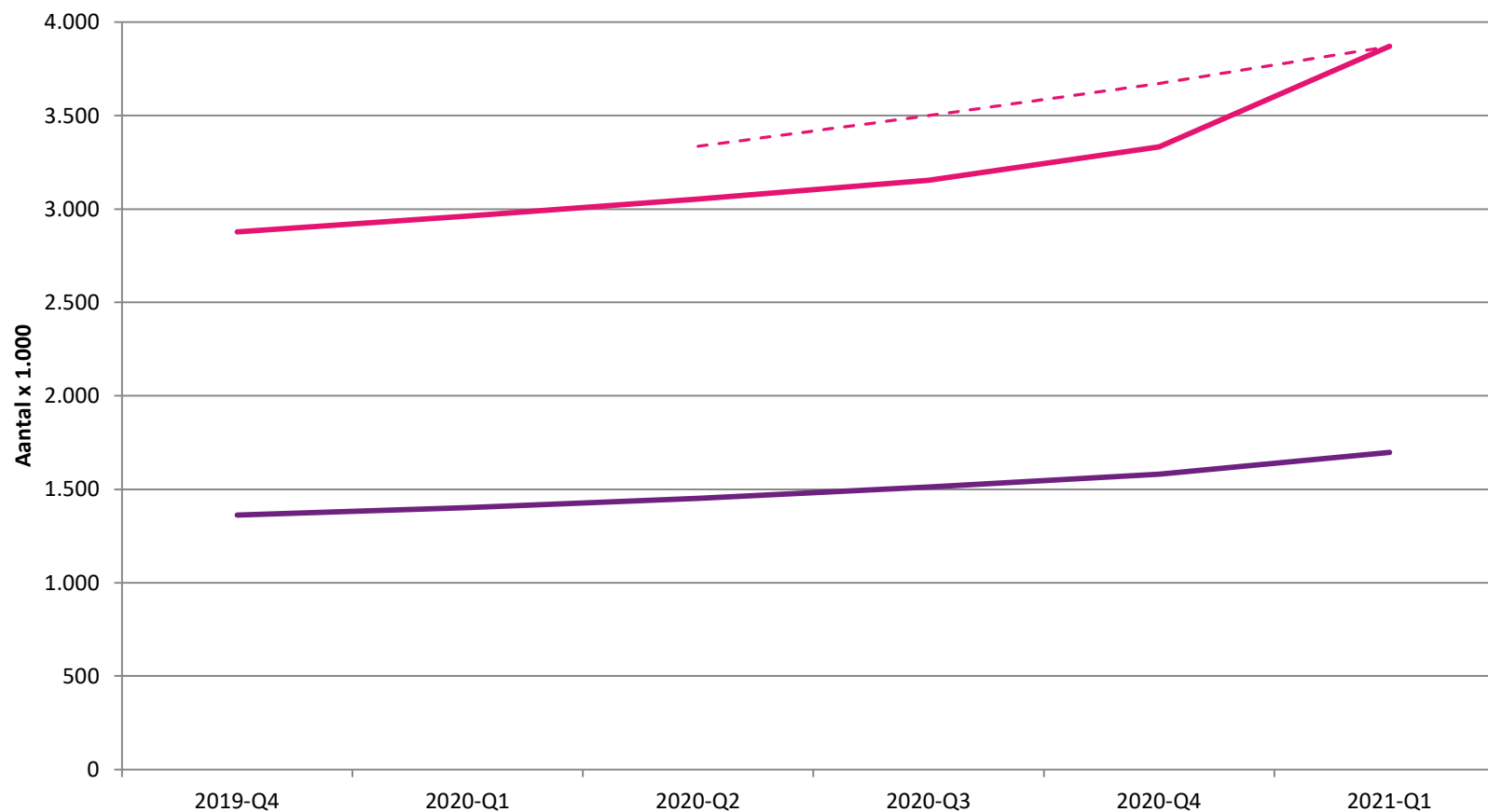


* Correcties doorgevoerd voor Inkoop actieve FttH en koper door KPN.

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

Broadband

Homes passed and activated (FttH)



	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4	2021-Q1
Homes passed fiber (FttH)	2.878	2.962	3.054	3.154	3.333	3.871**
Homes passed for small/regional fiber operators*	-	-	282	-	336	-
Homes activated fiber (FttH)	1.362	1.402	1.452	1.512	1.581	1.698**

* De ACM heeft in het kader van de Telecommontitor vijftien kleine en regionale glasvezelaanbieders toegevoegd aan haar reguliere uitvraag.

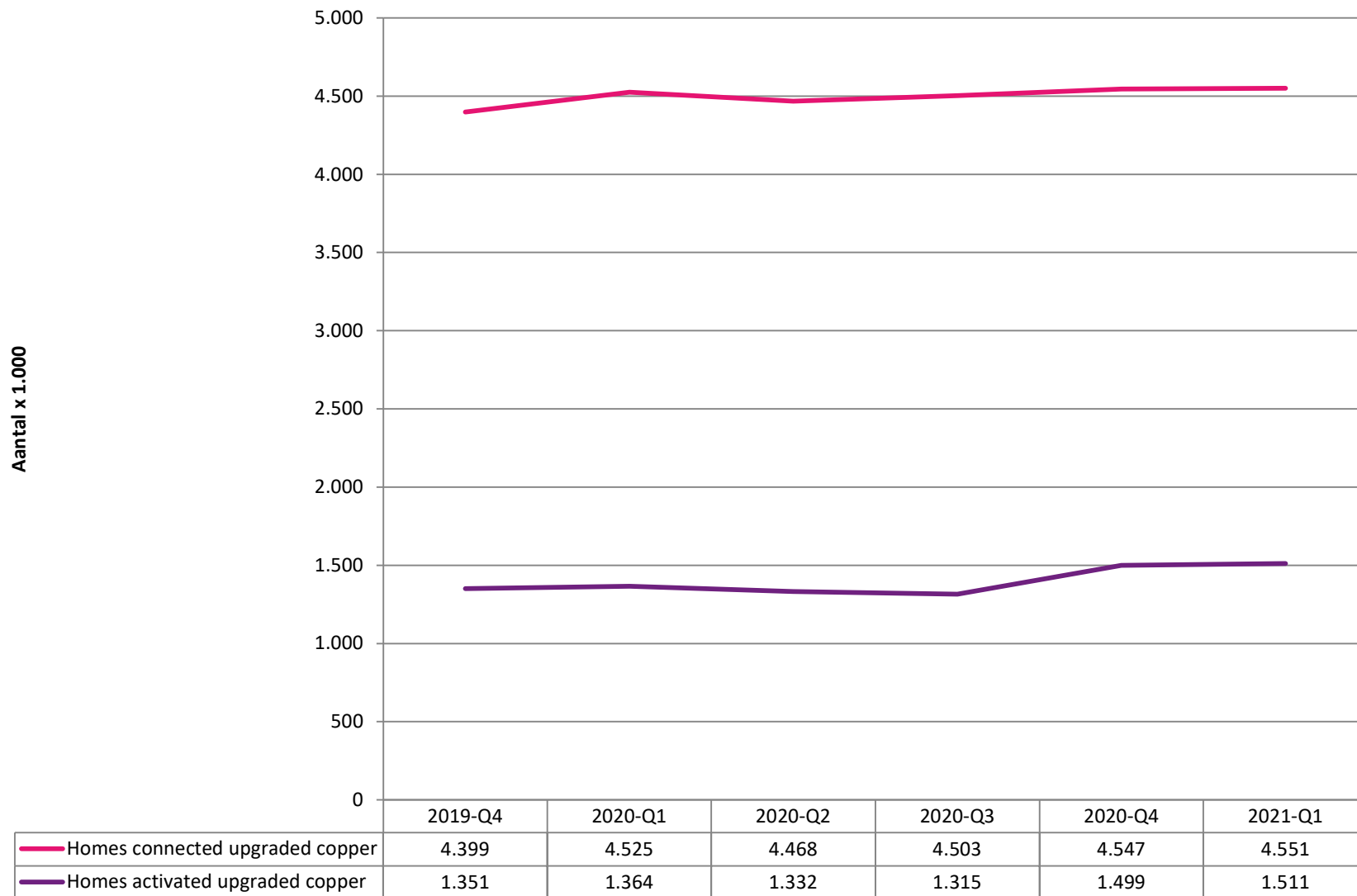
** Inclusief aansluitingen van kleine/regionale glasvezelaanbieders.

Zie pagina 60 van deze rapportage voor een lijst van de bevroegde marktpartijen.

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

Broadband

Homes connected to upgraded copper

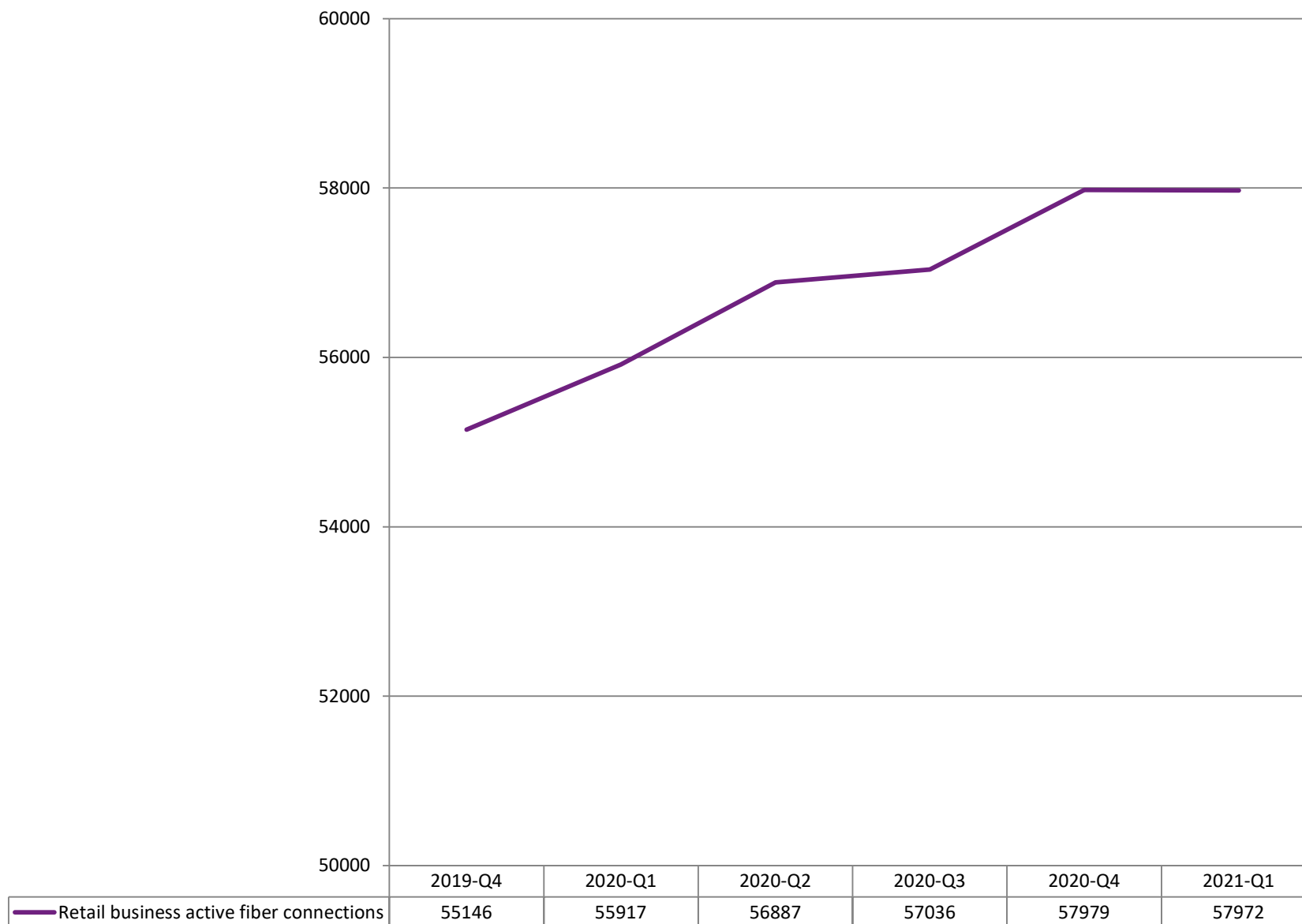


* Het aantal aansluitingen Homes activated upgraded koper vanaf de straatkast is voor de periode van Q4 2020 en eerder naar beneden bijgesteld.

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

Business network services

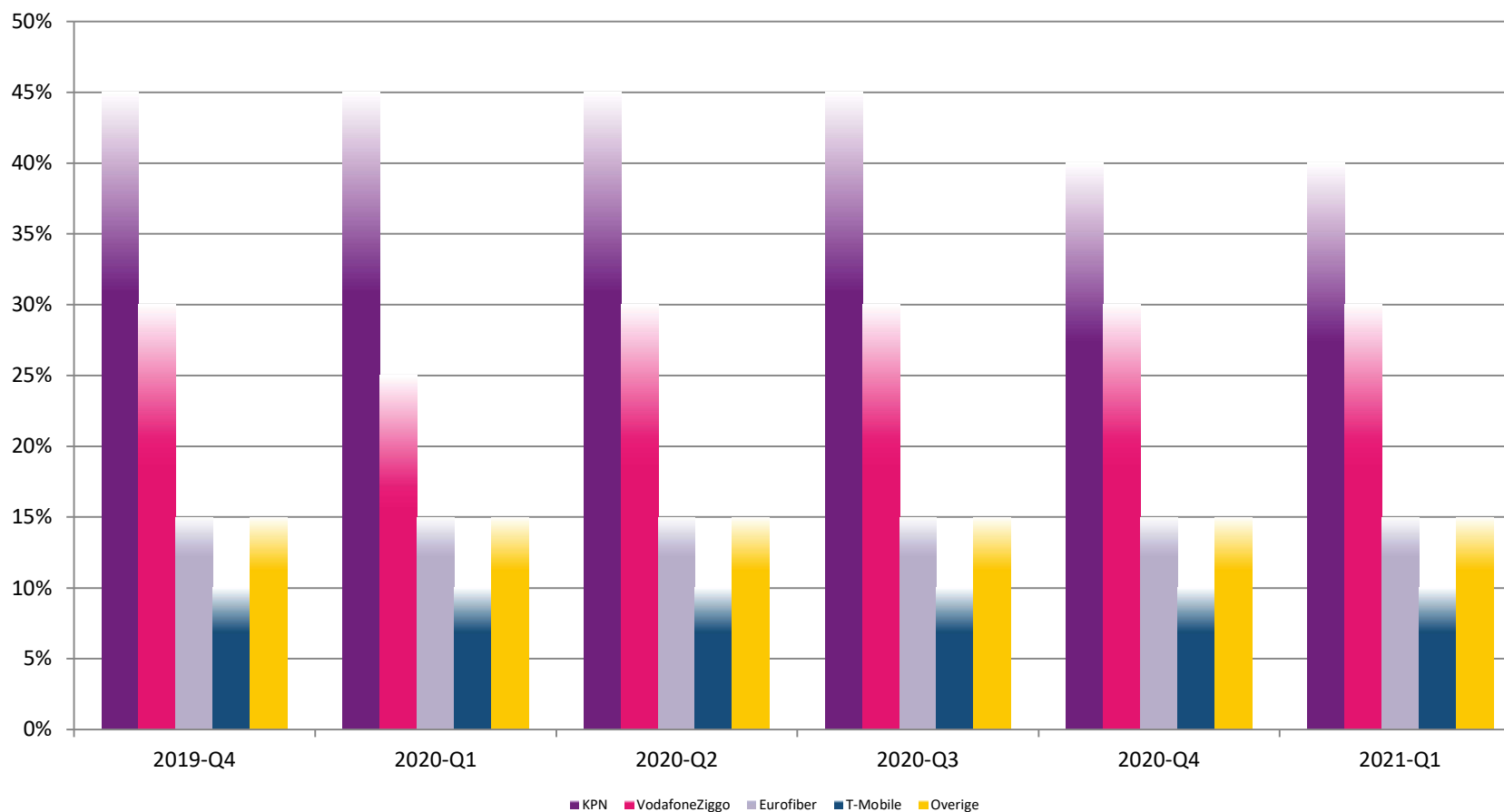
Retail business fiber-optic connections



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

Business network services

Market share based on retail business fiber-optic connections



	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4	2021-Q1
KPN	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[35 - 40%]	[35 - 40%]
VodafoneZiggo	[25 - 30%]	[20 - 25%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
Eurofiber	[10 - 15%]	[10 - 15%]	[10 - 15%]	[10 - 15%]	[10 - 15%]	[10 - 15%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
Overige	[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

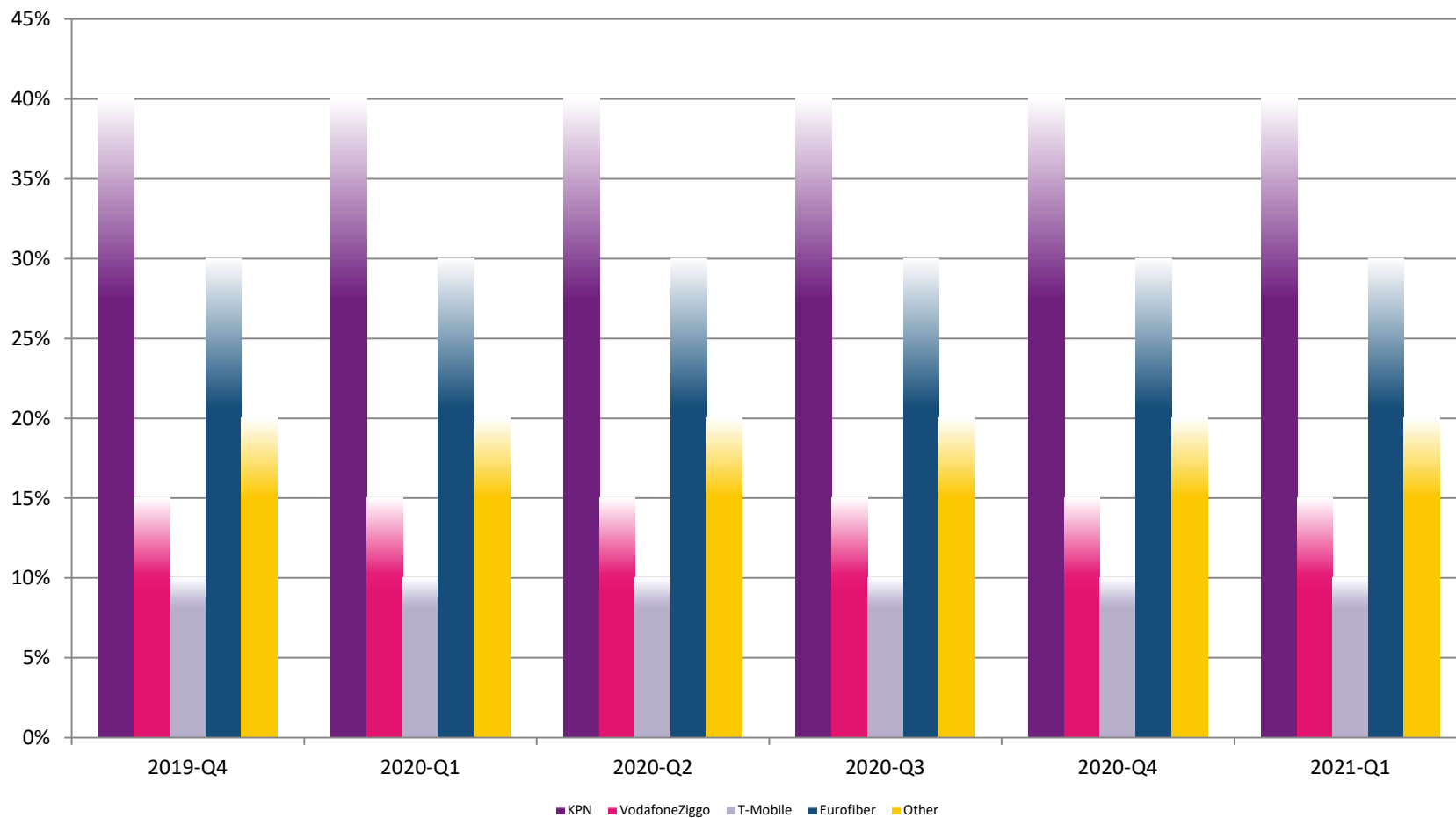


* Voor de periode van Q4 2020 en eerder heeft er een correctie plaatsgevonden in de aantallen ODF (FttO) aansluitingen.

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

Business network services

Wholesale market share based on business fiber-optic connections



	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4	2021-Q1
KPN	[35 - 40%]	[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	[5 - 10%]	[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 Telecommunitor. *Marktaandeel kleine en regionale marktpartijen zijn geschat op 10% (zie marktanalyse ODF-Access (FtO))

Television

Retail subscriptions per connection type

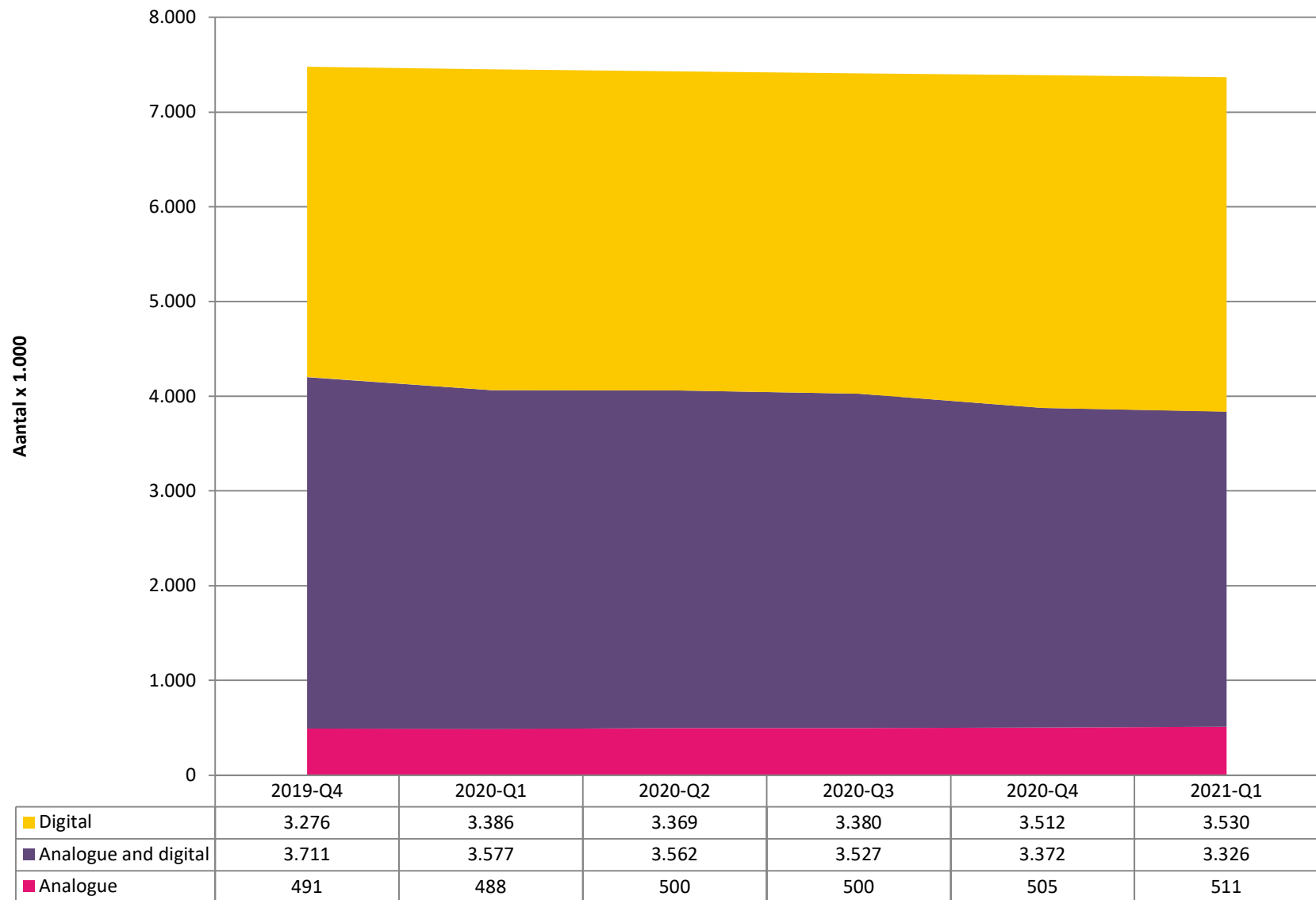


Op basis van vragen 40_A1_1_1-2-3, 40_A1_2_1-2, 40_A1_3_1-2-3, en 40_A1_4_1-2-3-4 van de Telecommonitor

Digitale platforms zijn bijvoorbeeld DSL, Digtienne en Satelliet.

Television

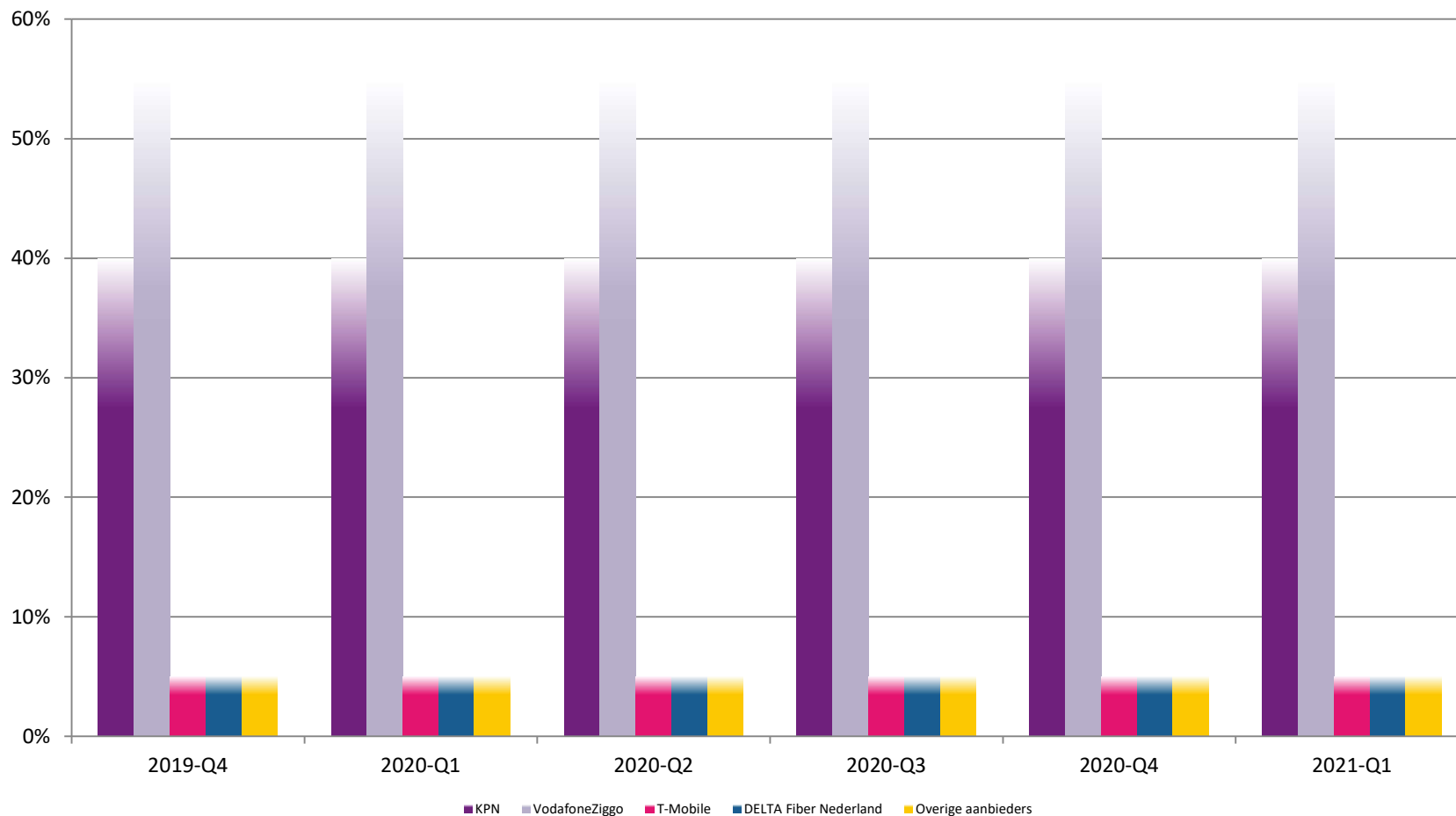
Digitalization of television subscriptions



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

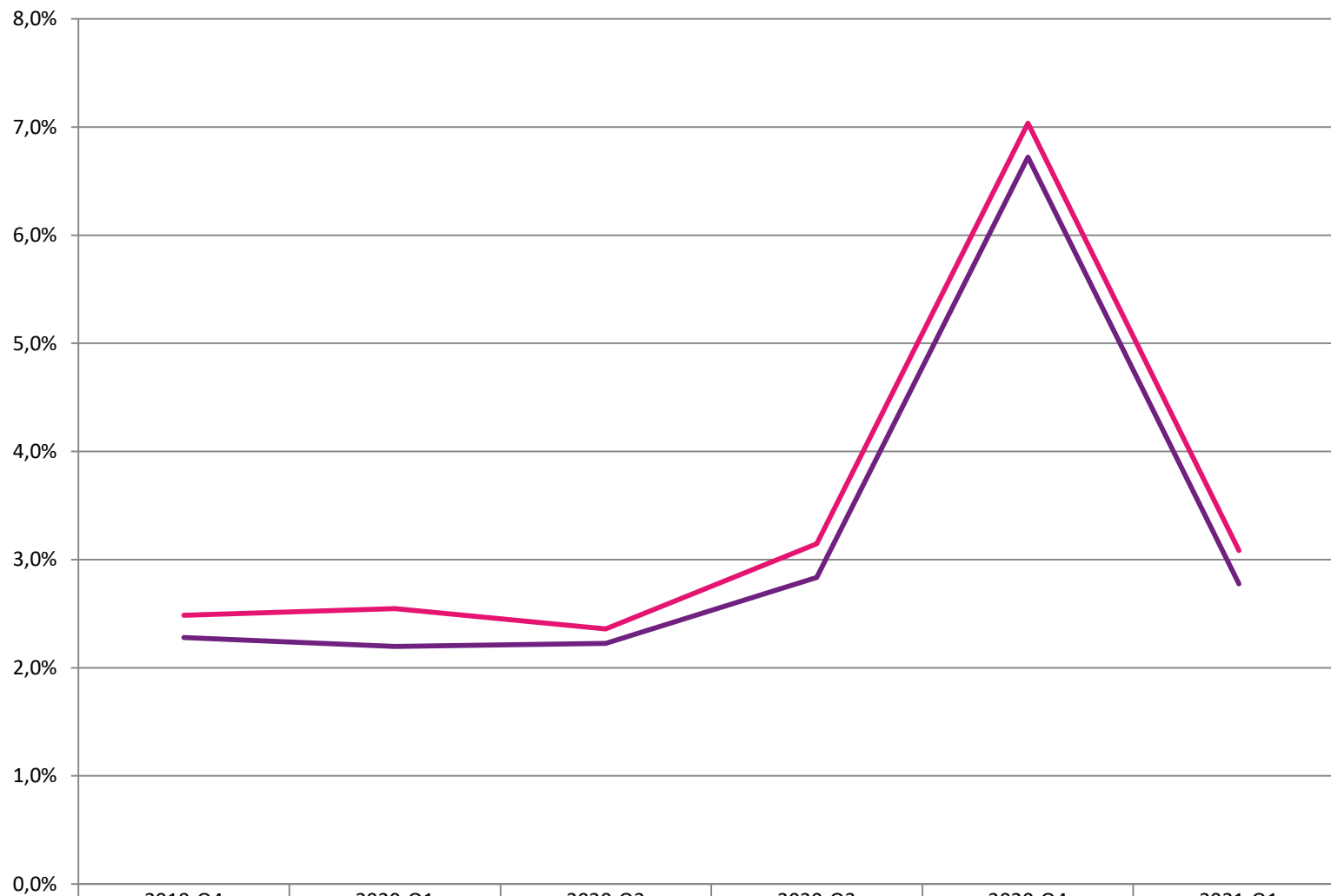


	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4	2021-Q1
KPN	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]
VodafoneZiggo	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]
T-Mobile	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 5%]	[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

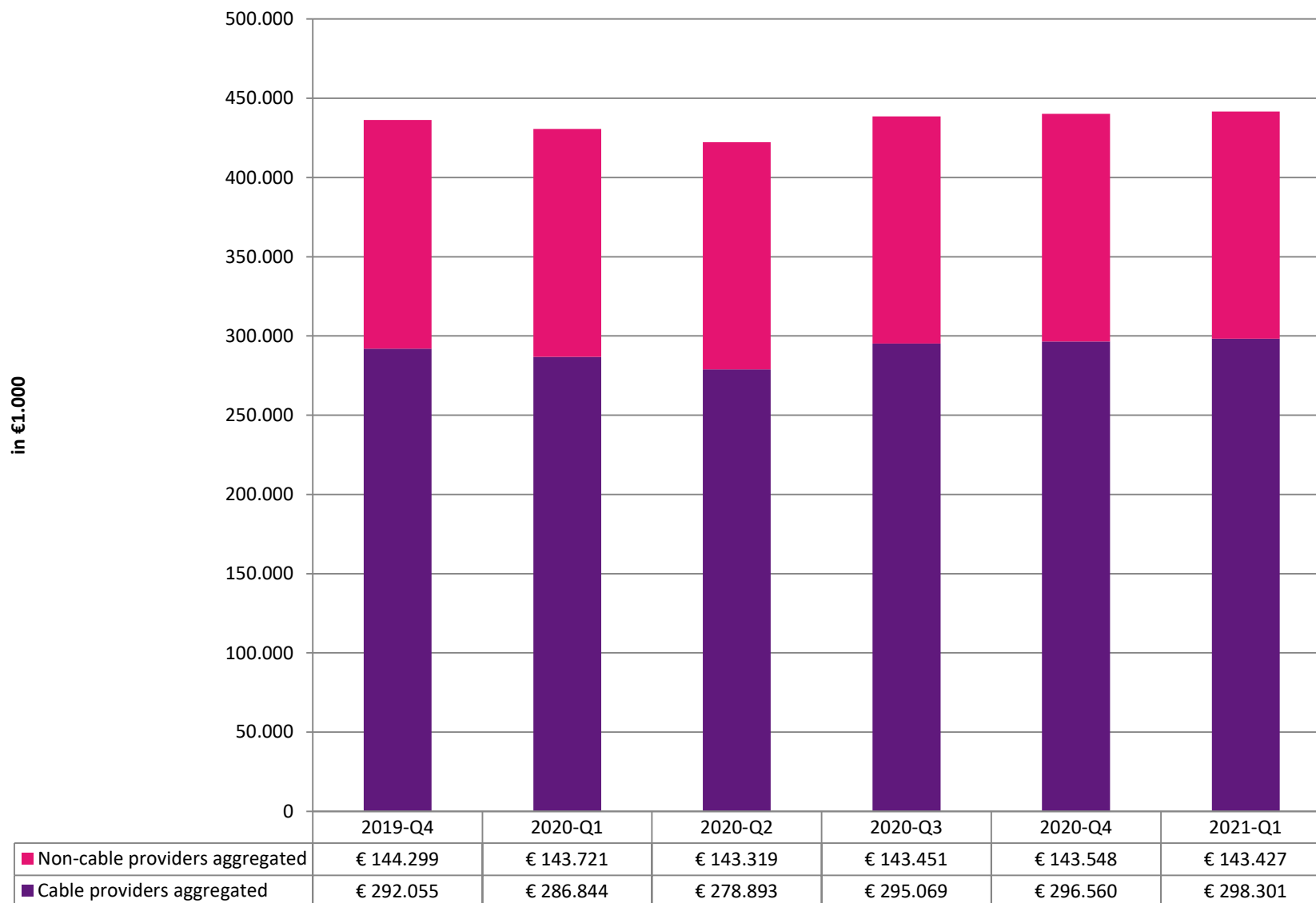
Retail churn of television subscriptions



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

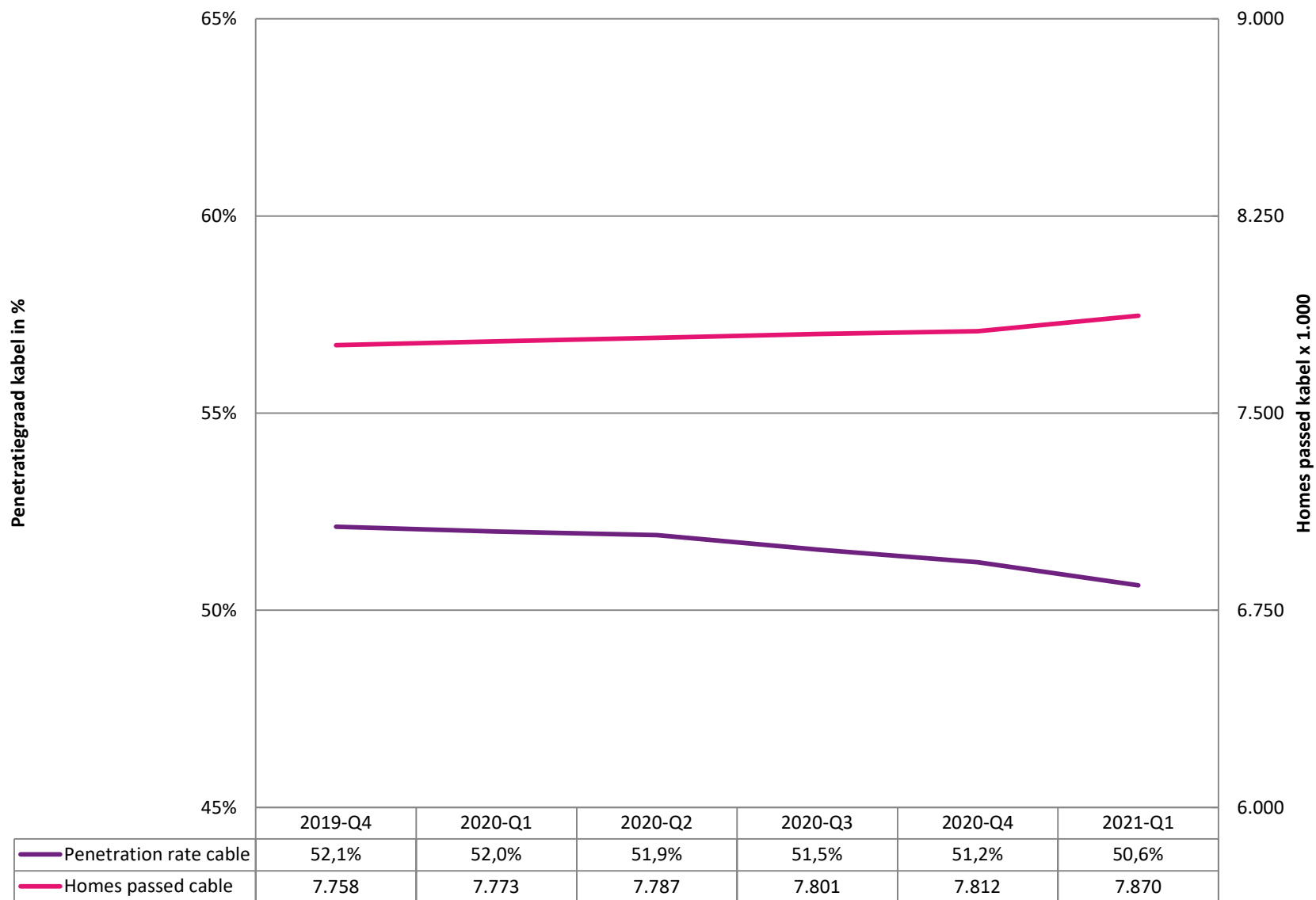
Retail turnover of radio/tv subscriptions



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

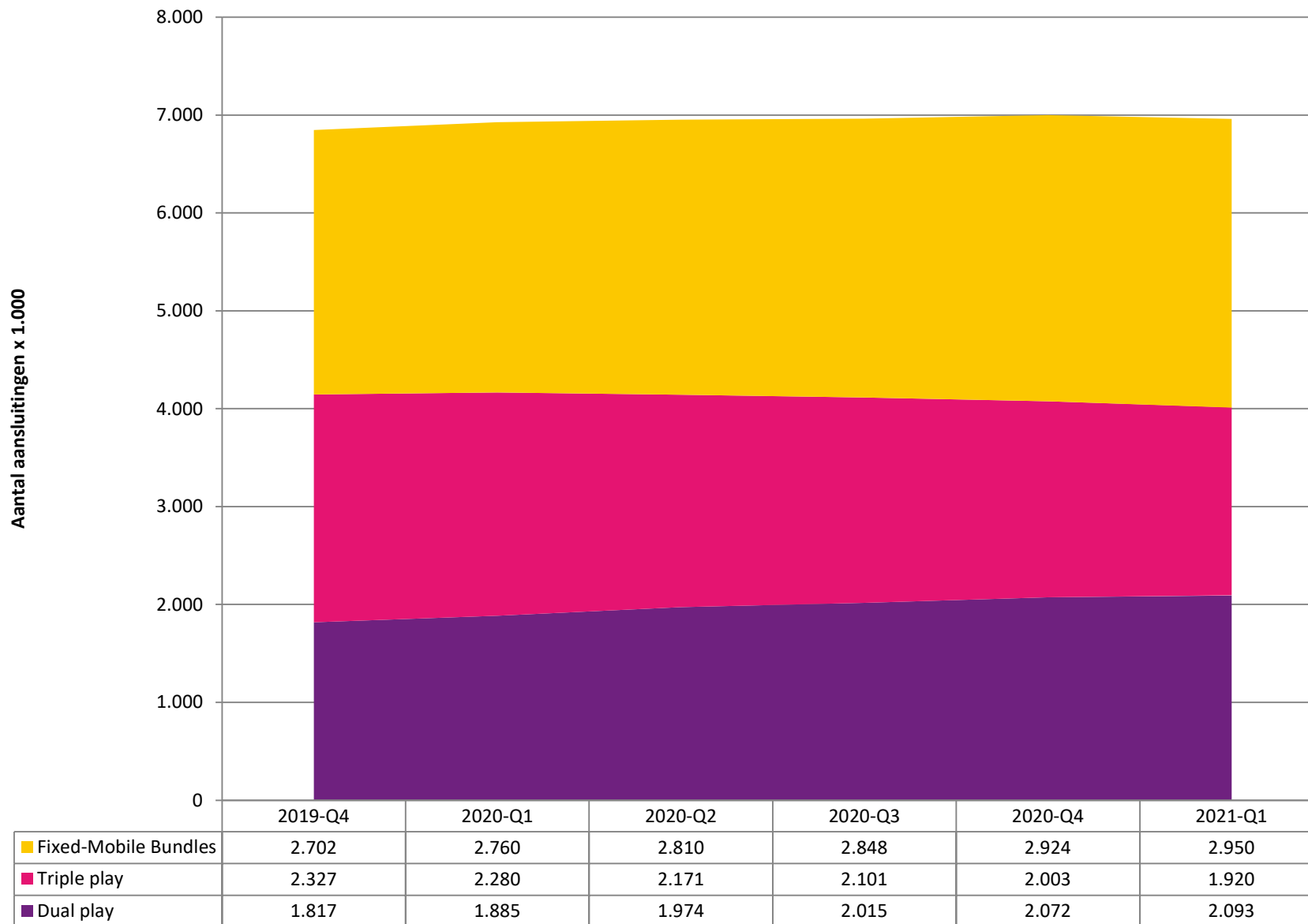
Homes passed and cable penetration level



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

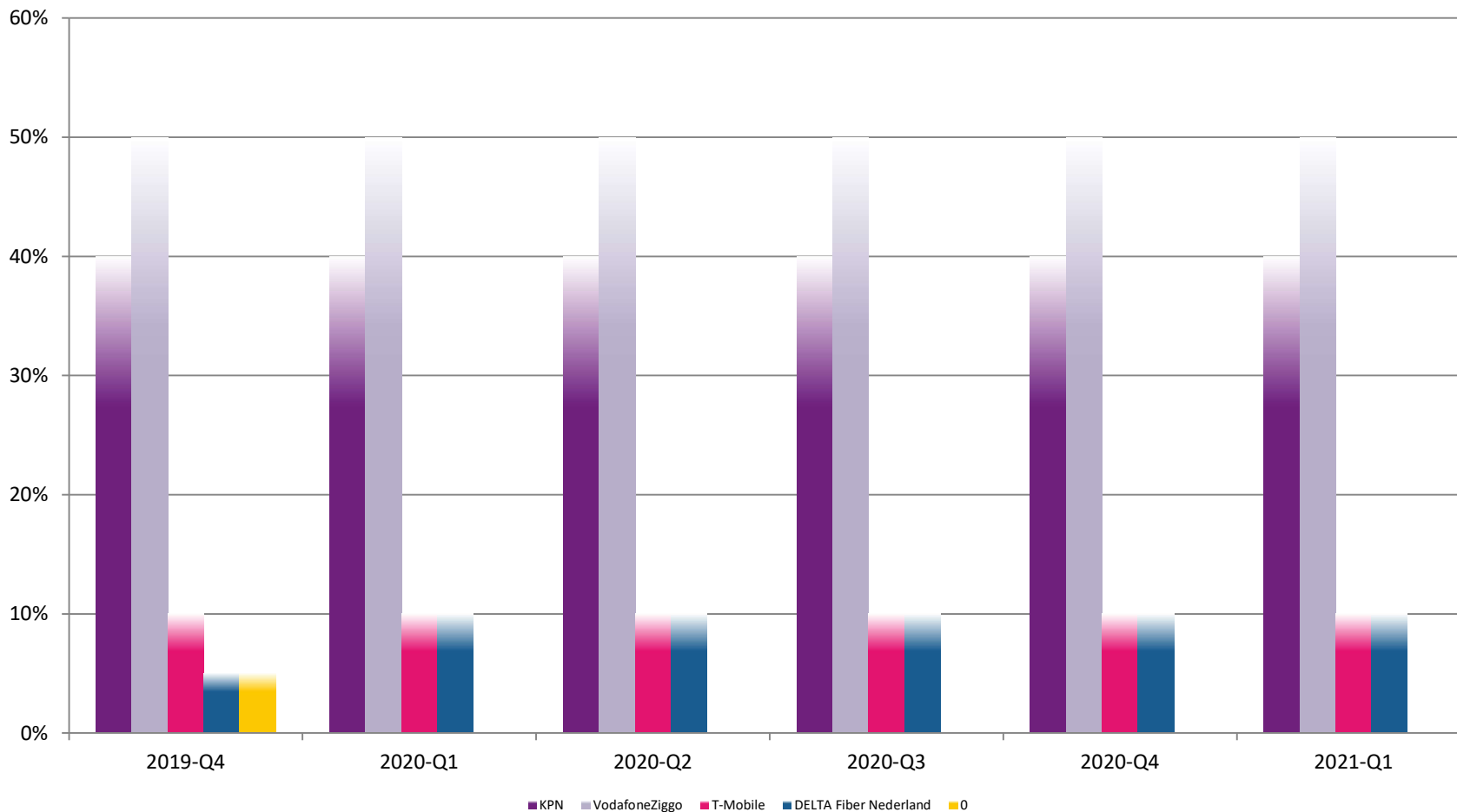


Op basis van vragen 50_A1_1_1-2-3-5-6, 50_A1_2_1-2-3-4, en 50_A1_3_1 van de Telecommonitor

Vast-mobiele bundels zijn bundels waarin één of meerdere vaste diensten worden gecombineerd met een mobiele dienst

Bundles

Retail market share of bundles

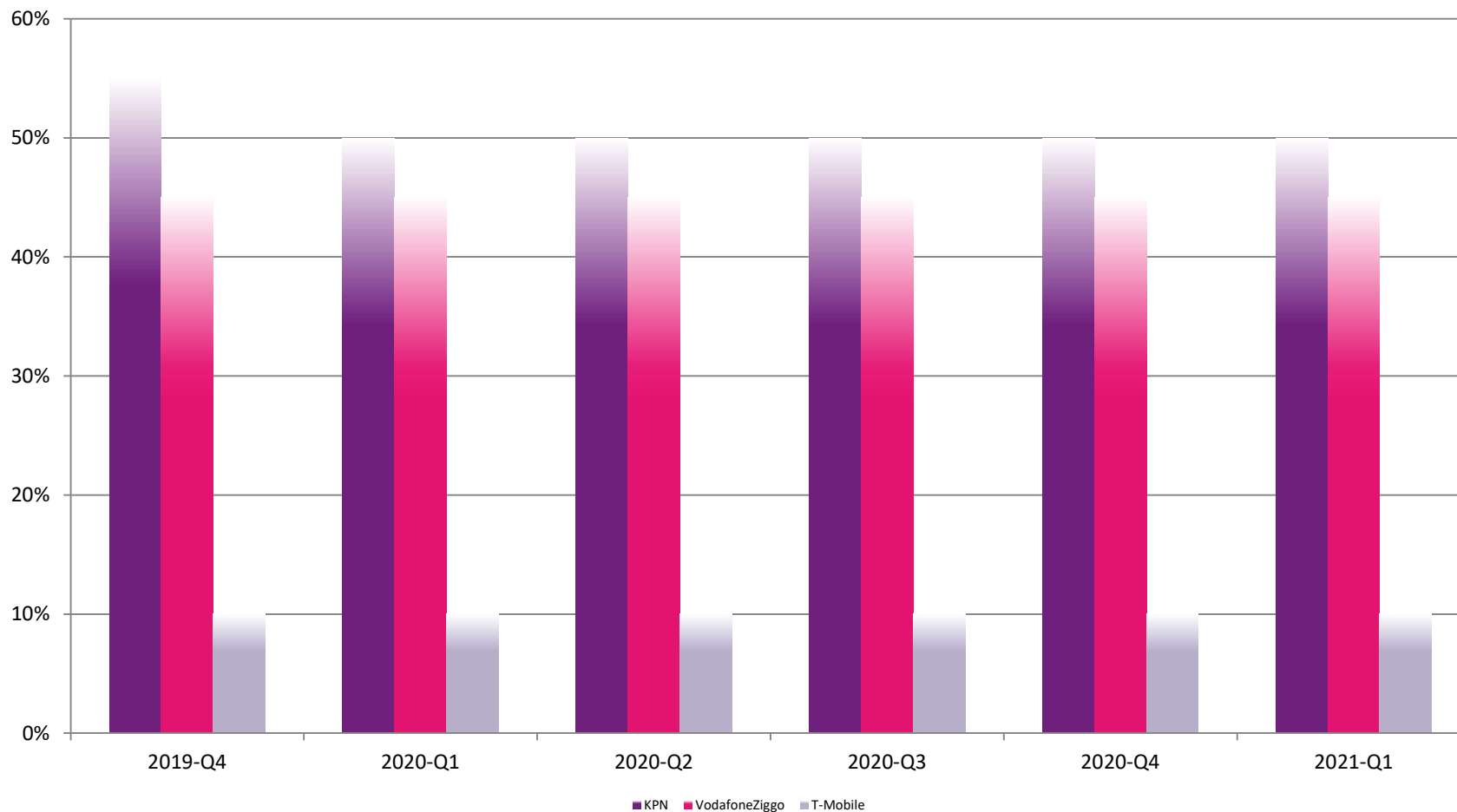


	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4	2021-Q1
KPN	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]
VodafoneZiggo	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
DELTA Fiber Nederland	[0 - 5%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
Other	[0 - 5%]	[0 - 0%]	[0 - 0%]	[0 - 0%]	[0 - 0%]	[0 - 0%]

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 market share of bundles with mobile



	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4	2021-Q1
KPN	[50 - 55%]	[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%]	[5 - 10%]

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

Vast-mobiele bundels zijn bundels waarin één of meerdere vaste diensten worden gecombineerd met een mobiele dienst

Bundles

Retail connections with broadband



	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4	2021-Q1
■ Broadband in Fixed-Mobile	25%	25%	25%	26%	26%	26%
■ Broadband in triple play	41%	41%	40%	39%	38%	37%
■ Broadband in dual play	25%	26%	27%	28%	28%	29%
■ Broadband only	8%	7%	7%	7%	7%	8%
— Breedband in vast-mobiel	36%	37%	38%	38%	39%	39%

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-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4	2021-Q1
TV in Fixed-Mobile	24%	24%	25%	25%	26%	26%
TV in triple play	39%	39%	38%	37%	37%	36%
TV in dual play	19%	20%	22%	22%	23%	24%
TV only	18%	16%	16%	15%	14%	14%
TV in vast-mobiel	52%	53%	55%	56%	58%	59%

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-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4	2021-Q1
Fixed telephony in Fixed-Mobile	34%	34%	36%	37%	37%	38%
Fixed telephony in triple play	44%	43%	43%	42%	40%	39%
Fixed telephony in dual play	6%	6%	6%	6%	6%	6%
Fixed telephony only	16%	16%	15%	15%	17%	18%
Vaste telefonie in vast-mobiel	43%	44%	46%	47%	48%	49%

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		KPN	AT&T
BT		T-Mobile (incl. Tele2)	BT
CanalDigitaal		VodafoneZiggo	CanalDigitaal
Colt			Colt
Delta Fiber Nederland			Delta Fiber Nederland
Eurofiber			Eurofiber
KPN			KPN
T-Mobile (incl. Tele2)			T-Mobile (incl. Tele2)
Verizon			Verizon
VodafoneZiggo			VodafoneZiggo
Breedband en netwerkdiensten		Televisie	Bundels
AT&T	<i>GlaswebVenray</i>	CanalDigitaal	CanalDigitaal
BT	<i>Kabelnoord</i>	Delta Fiber Nederland	Delta Fiber Nederland
CanalDigitaal	<i>KT Waalre</i>	KPN	KPN
Colt	<i>Lomboxnet</i>	T-Mobile (incl. Tele2)	T-Mobile (incl. Tele2)
Delta Fiber Ned.	<i>Midden-Brab. Glas</i>	VodafoneZiggo	VodafoneZiggo
Eurofiber	<i>Primevest</i>		
KPN	<i>Rekam</i>		
T-Mobile/Tele2	<i>SKP</i>		
Verizon	<i>SKV</i>		
VodafoneZiggo			
<i>CAI Hardewijk</i>			
<i>Delta Rijssen</i>			
<i>E-Fiber</i>			
<i>FiberFlevo</i>			
<i>FiberNH</i>			
<i>Glasdraad</i>			



Glossary (Dutch)

Algemeen

Adds	Toename van aansluitingen.
Disconnects	Afname van aansluitingen.
Homes passed	Aansluiting die tot aan de voordeur is aangelegd.
Homes activated	Aansluiting die is geactiveerd (met een abonnement).

Mobiel

MNO	Mobile Network Operator. Mobiele operator met eigen netwerk.
MVNO	Mobile Virtual Network Operator. Mobiele operator die gebruik maakt van het netwerk van derden.

Vaste telefonie

PSTN	Public Switched Telephone Network. Traditionele telefonienetwerk, bestaande uit analoge telefonie en ISDN.
ISDN	Integrated Services Digital Network. Vorm van digitale telefonie, waarbij meerdere (medium)kanalen over één aderpaar mogelijk zijn.
VoB	Voice over Broadband / Voice over Internet Protocol (VoIP). Spraak over een breedband (internet)verbinding.

Autoriteit
Consument & Markt



Breedband & Zakelijke netwerk diensten

DSL	Digital Subscriber Line, koperverbinding.
Kabel	Coaxiale kabelverbinding.
FttH (ODF)	Fiber to the Home. Glasvezel tot aan de meterkast (huis).
FttO (ODF)	Fiber to the Office. Glasvezel tot in een bedrijfspand.

Bundels

Vast-Mobiel	Bundels met één of meerdere vaste diensten, gecombineerd met een mobiele dienst.
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