Autoriteit
Consument & Markt

Telecom Monitor

Q4 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.

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Trends

Fourth quarter of 2020

The Telecom Monitor that the Netherlands Authority for Consumers and Markets (ACM) published today shows a notable increase in the volume of voice minutes in 2020 compared with the previous years. The cause of this considerable increase can presumably be attributed to the effects of the measures taken to prevent the spread of COVID-19. The volume of mobile voice minutes in 2020 was 43 billion minutes, which is an increase of 42 percent compared with 2019. Between 2016 and 2019, the volume of mobile voice minutes was approximately 30 billion minutes. The volume of voice minutes for fixed telephony, too, increased last year for the first time in five years by 5.5 percent to 9.4 billion minutes. In the previous five years, the volume of voice minutes for fixed telephony decreased by, on average, 14 percent. In 2020, call minutes over traditional telephony, such as ISDN and PSTN, dropped by 30 percent, whereas call minutes over digital telephony increased by 15 percent.

Mobile telephony

In 2020, consumption of mobile data in the Netherlands reached almost one trillion MB for the first time ever, which is an increase of 25 percent compared with 2019. The number of text messages that were sent decreased by 15 percent. The number of mobile connections slightly increased in 2020. The number of connections increased by 133,000 to 22.3 million mobile connections in total. Telecom operator T-Mobile's market share went up, and is now 30 to 35 percent, compared with 25 to 30 percent in Q4 2019. This increase can in part be explained by the acquisition of Dutch telecom operator Simpel. Telecom operator KPN's market share was between 25 and 30 percent, and VodafoneZiggo's market share was between 20 and 25 percent. The market shares of KPN and VodafoneZiggo have remained stable compared with 2019.

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More households are connected to fiber-optic networks

In the Netherlands, 3.33 million households are connected to the fiber-optic networks of KPN and DELTA Fiber Netherlands. Other providers, such as E-Fiber and Primevest/T-Mobile, have 340,000 fiber-optic connections. In total, 3.67 million households have a fiber-optic connection.

ACM keeps a close watch on the roll-out of fiber-optic, and identifies what potential problems may occur in that process. ACM will soon publish an update of its market study into the roll-out of fiber-optic.

Increase in bundling of fixed and mobile services

The use of bundles, plans that combine mobile services with fixed services (such as television, fixed telephony and/ or broadband access), is growing. In 2020, the number of fixed-mobile bundles has increased to 2.9 million. ACM also sees that, for the first time ever, there are more bundles that combine two fixed services than bundles that combine three fixed services. This is because fixed telephony is taken out increasingly less. In 2020, 2.1 million dual-play bundles were taken out, and 2 million triple-play bundles.

Remarks and corrections
(Dutch)

Mobiel
Correctie: mobiel verbruik Q4 2020 (p. 15)
- ca. + 10 miljard MB 3G data
- ca. - 10 miljard MB 4G data

Breedband
De Telecommonitor is in 2020 uitgebreid met een tiental kleine en regionale glasvezelaanbieders. Het aantal homes passed voor glasvezel is hierdoor in de Telecommonitor in Q4 2020 toegenomen met 340 duizend aansluitingen naar een totaal van 3,67 miljoen (p. 40)

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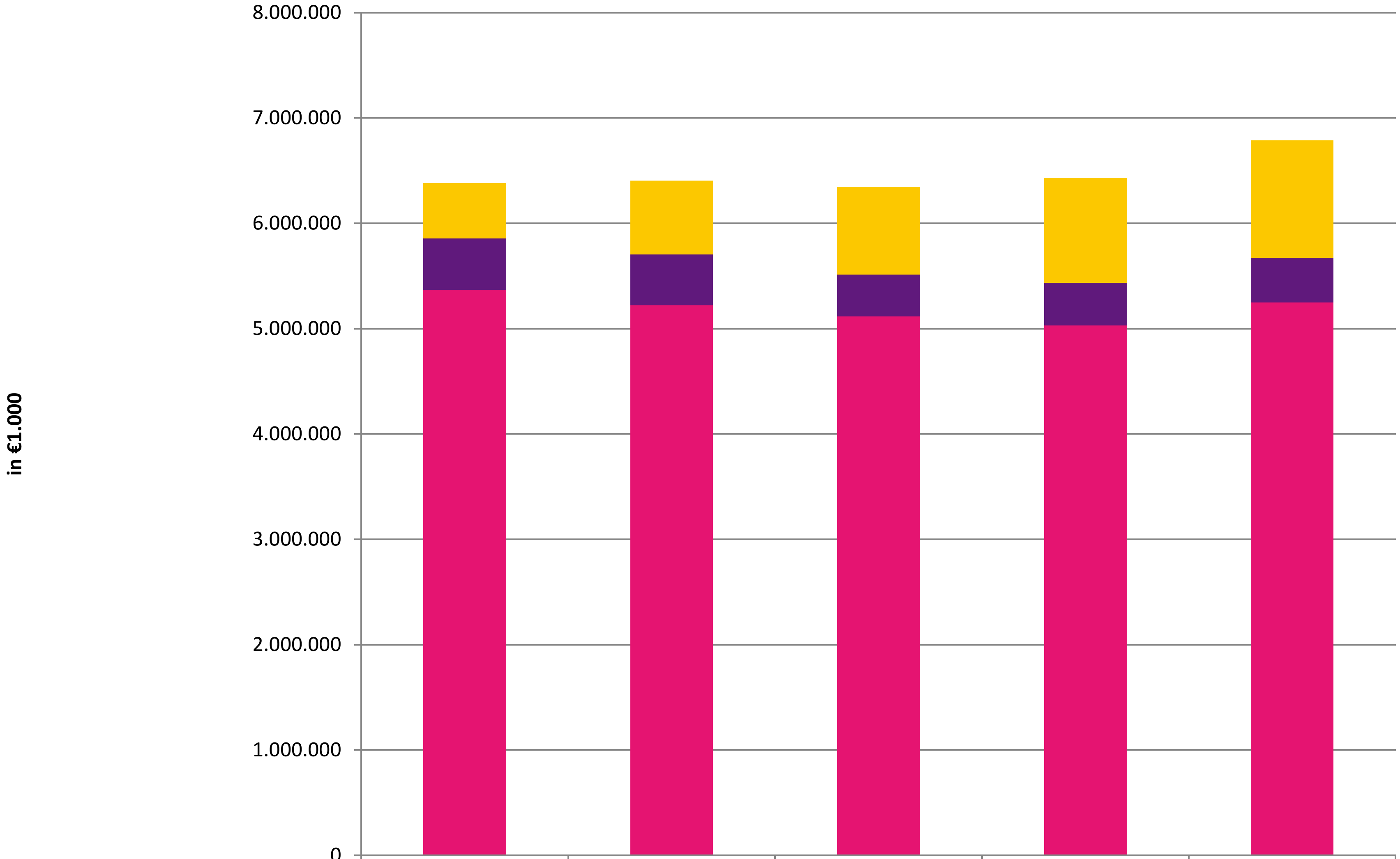
Annual figures

Fixed network related revenues



	2016	2017	2018	2019	2020
Other investments mobile networks	€ 523.264	€ 697.189	€ 833.796	€ 995.809	€ 1.111.875
Wholesale revenue fixed networks	€ 483.595	€ 486.577	€ 396.620	€ 400.670	€ 424.244
Retail revenue fixed networks	€ 5.370.719	€ 5.218.912	€ 5.115.678	€ 5.032.137	€ 5.248.773

Op basis van vragen 0_A1_3_1-2-3-4 en 0_A1_4_1-2-3-4 van de Telecommonitor

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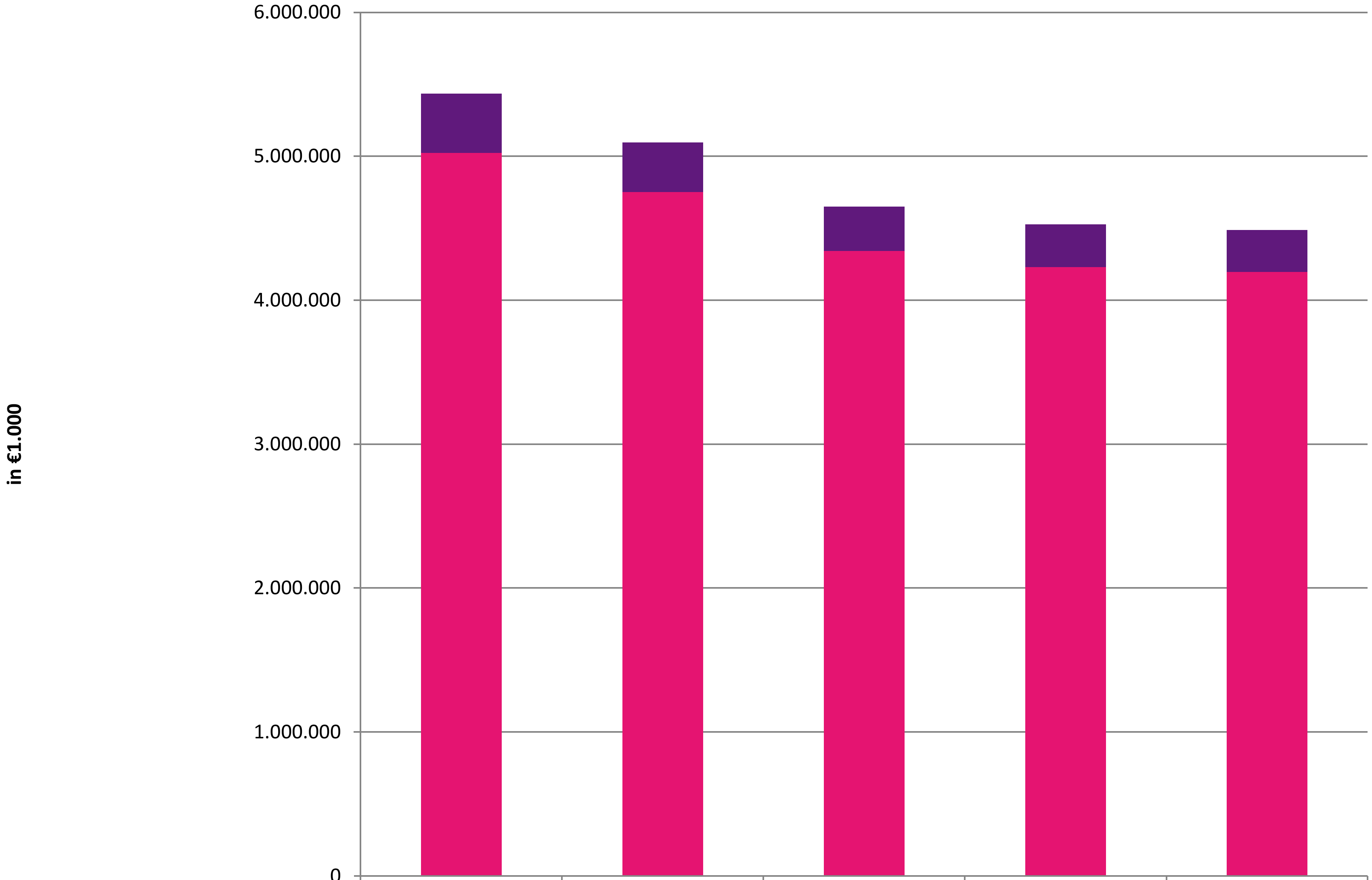
Annual figures

Mobile network related revenues

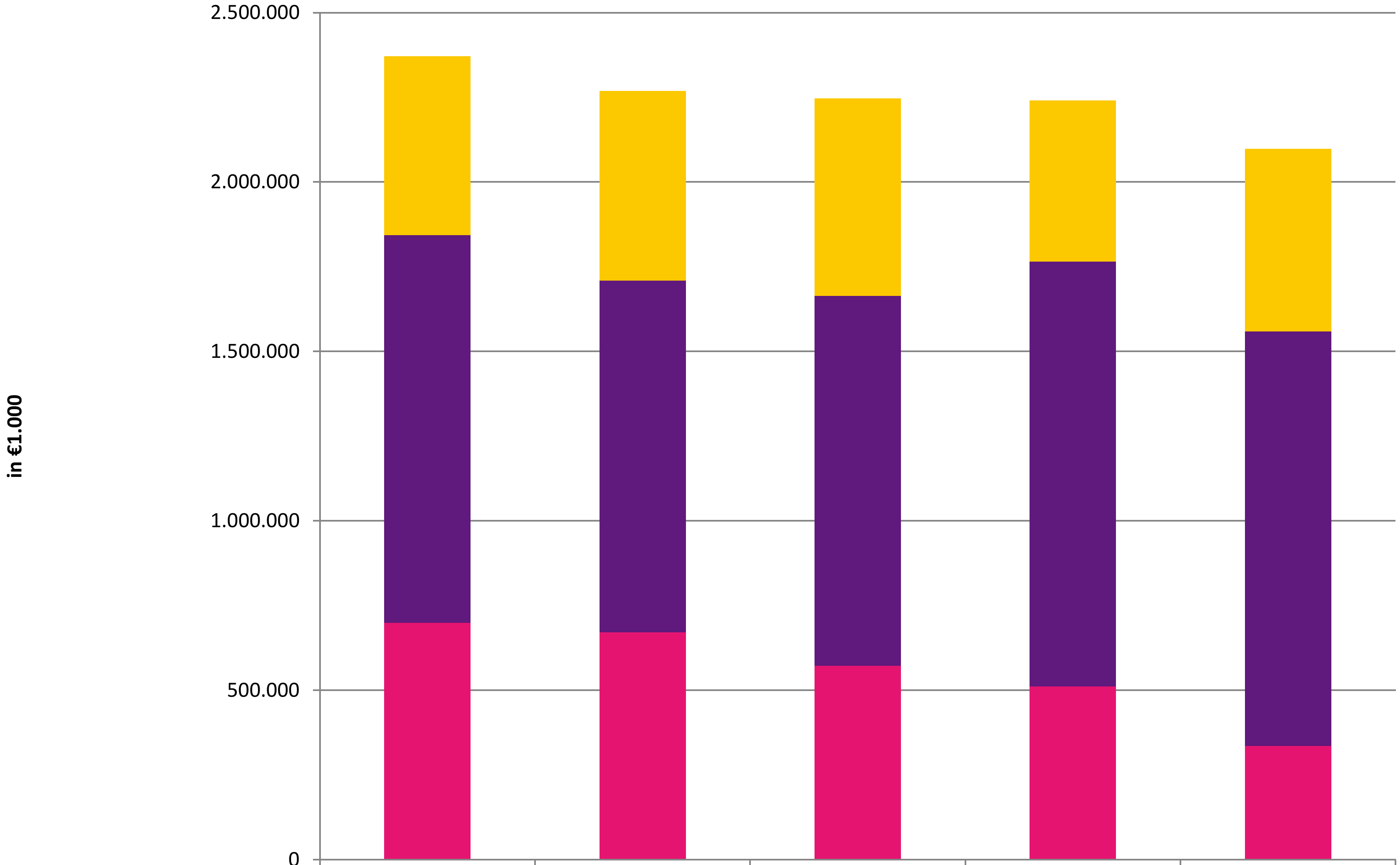


	2016	2017	2018	2019	2020
Wholesale revenue mobile networks	€ 411.529	€ 343.722	€ 306.817	€ 297.045	€ 288.028
Retail revenue mobile networks	€ 5.022.400	€ 4.749.624	€ 4.342.255	€ 4.229.336	€ 4.197.677

Op basis van vragen 0_A1_1_1-2-3 en 0_A1_2_1-2-3 van de Telecommonitor

Annual figures

Mobile and fixed network investments

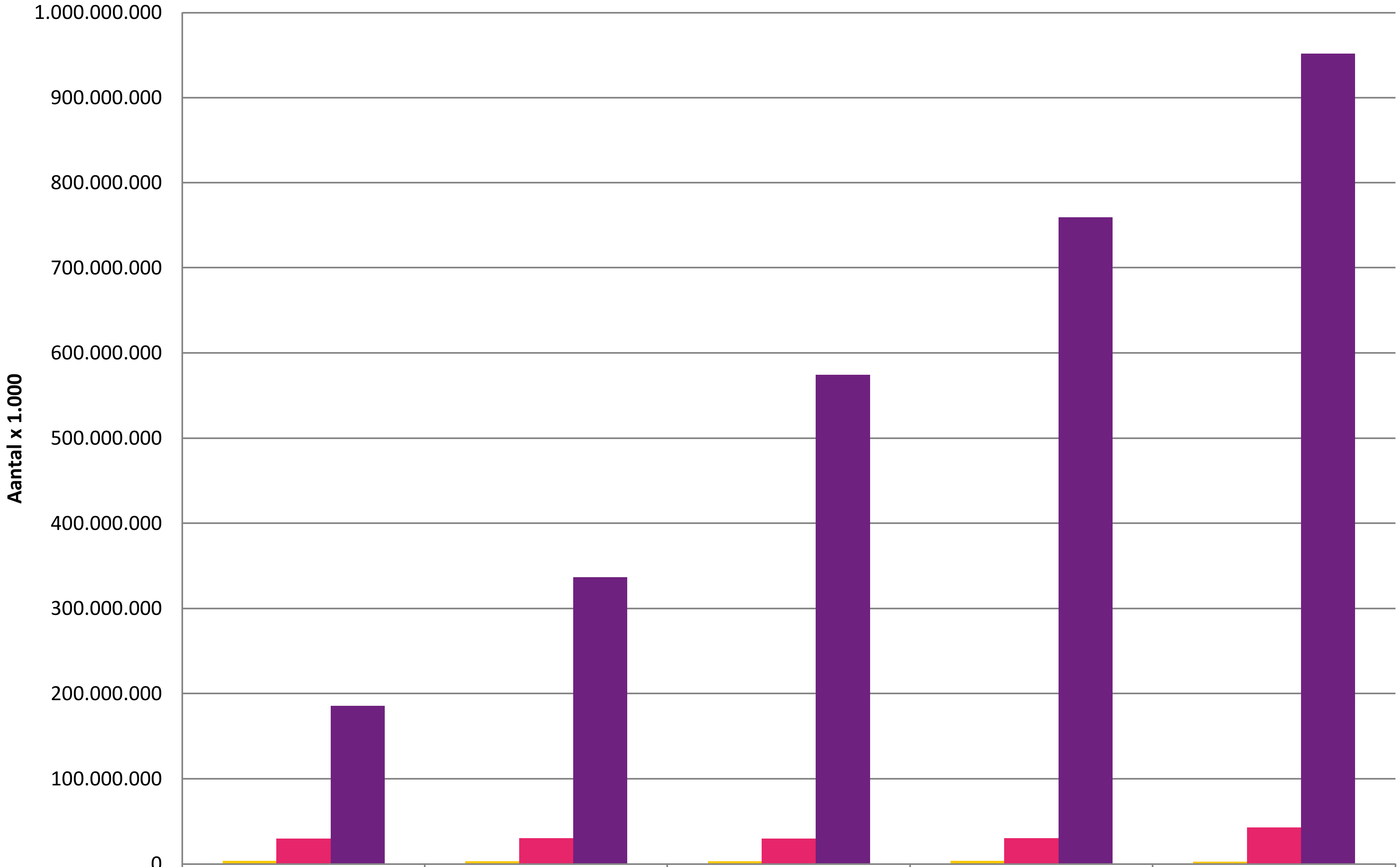


	2016	2017	2018	2019	2020
Other investments	€ 526.969	€ 558.734	€ 582.699	€ 474.742	€ 538.458
Investment in fixed networks	€ 1.144.236	€ 1.037.906	€ 1.092.262	€ 1.253.754	€ 1.223.863
Investment in mobile networks	€ 698.924	€ 670.869	€ 571.963	€ 511.279	€ 335.328

Op basis van vragen 0_A2_1_1-2-3 van de Telecommonitor

Annual figures

Retail volume of voice minutes, data and SMS/text



	2016	2017	2018	2019	2020
SMS	3.289.103	3.078.015	3.140.639	3.180.228	2.695.814
Minutes	29.740.659	30.169.688	29.617.213	30.143.595	42.928.821
Data (MB)	185.492.771	336.842.101	574.180.321	759.639.503	951.731.204

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

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Annual figures

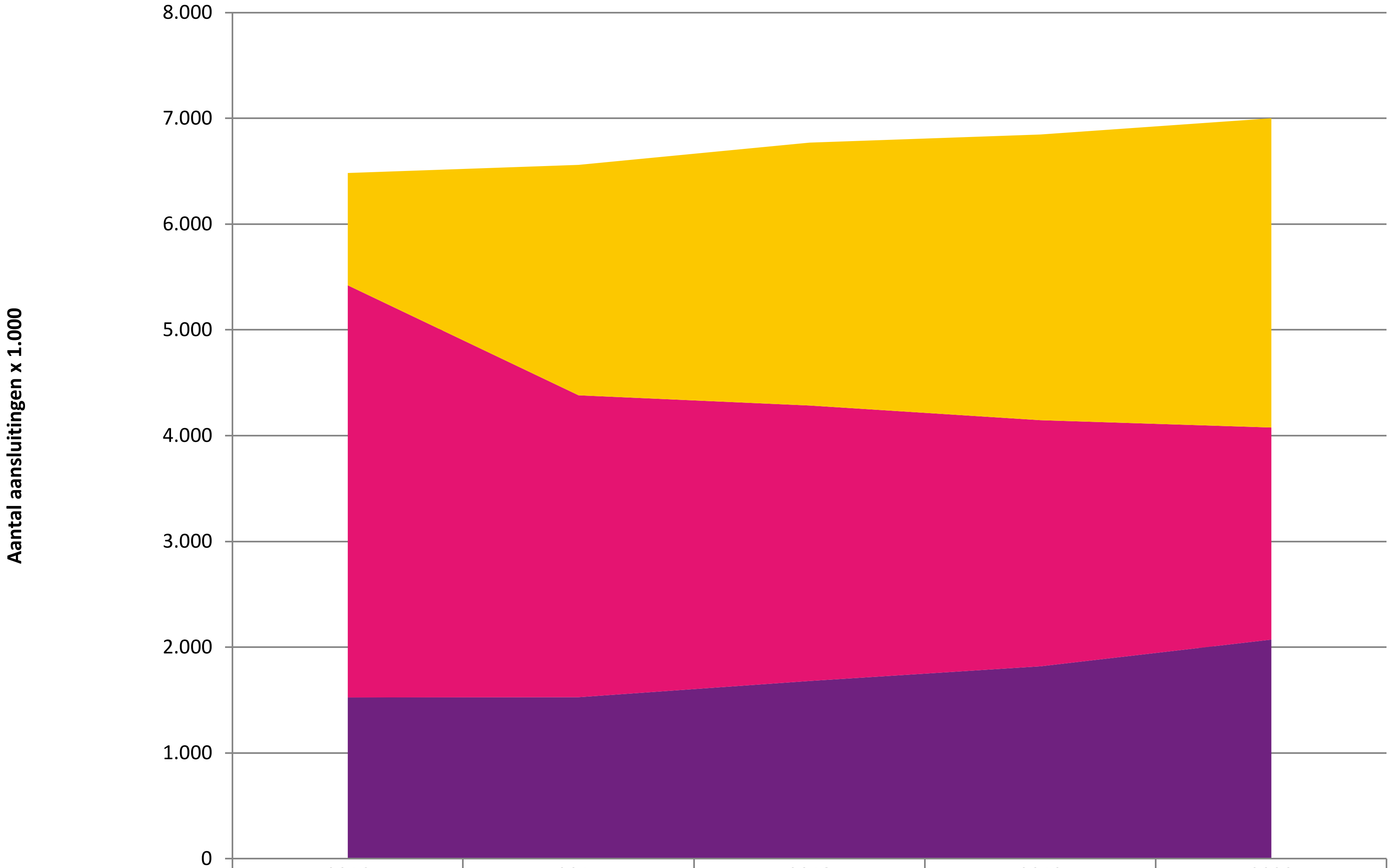
Retail connections by speed

	2016	2017	2018	2019	2020
≥ 100 Mbps	32,8%	41,4%	43,9%	45,7%	48,8%
≥ 30 Mbps, < 100 Mbps	40,9%	45,3%	46,2%	46,0%	43,7%
≥ 10 Mbps, < 30 Mbps	24,4%	11,8%	8,9%	7,7%	6,6%
< 10 Mbps	1,8%	1,5%	1,0%	0,6%	1,0%

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

Annual figures

Bundles of telecommunication services

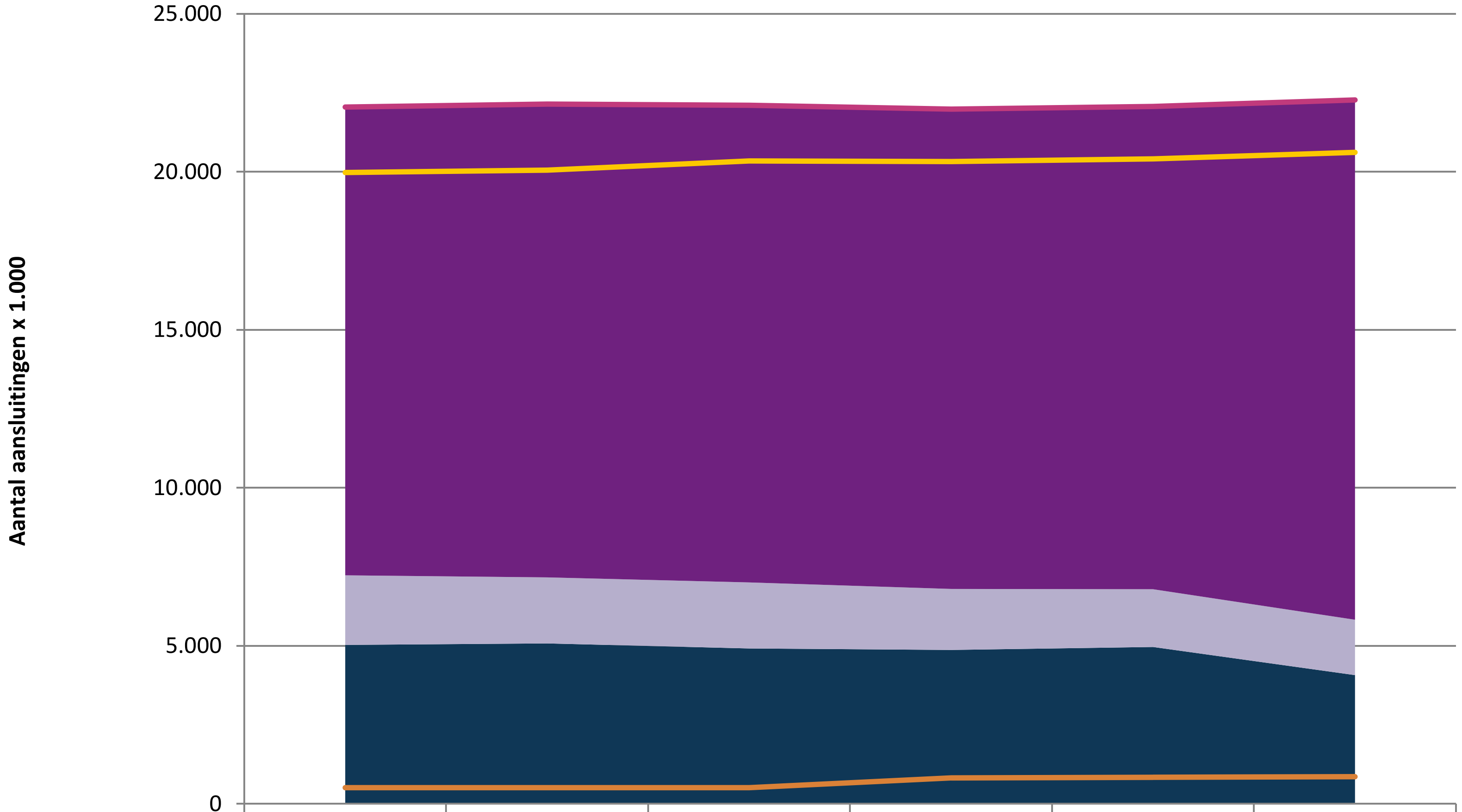


	2016	2017	2018	2019	2020
Fixed-Mobile Bundles	1.062	2.179	2.484	2.702	2.924
Triple play	3.895	2.853	2.605	2.327	2.003
Dual play	1.524	1.527	1.679	1.817	2.072

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

Mobile

Retail connections



	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Postpaid MNO	14.818	14.975	15.097	15.186	15.273	16.450
Prepaid MNO	2.205	2.093	2.095	1.932	1.825	1.756
Postpaid and prepaid MVNO	5.022	5.070	4.910	4.862	4.962	4.065
Total mobile connections	22.045	22.138	22.102	21.979	22.059	22.270
Of which bundled (data and speech)	19.974	20.051	20.333	20.323	20.403	20.610
Of which data only connections	509	505	512	821	832	855

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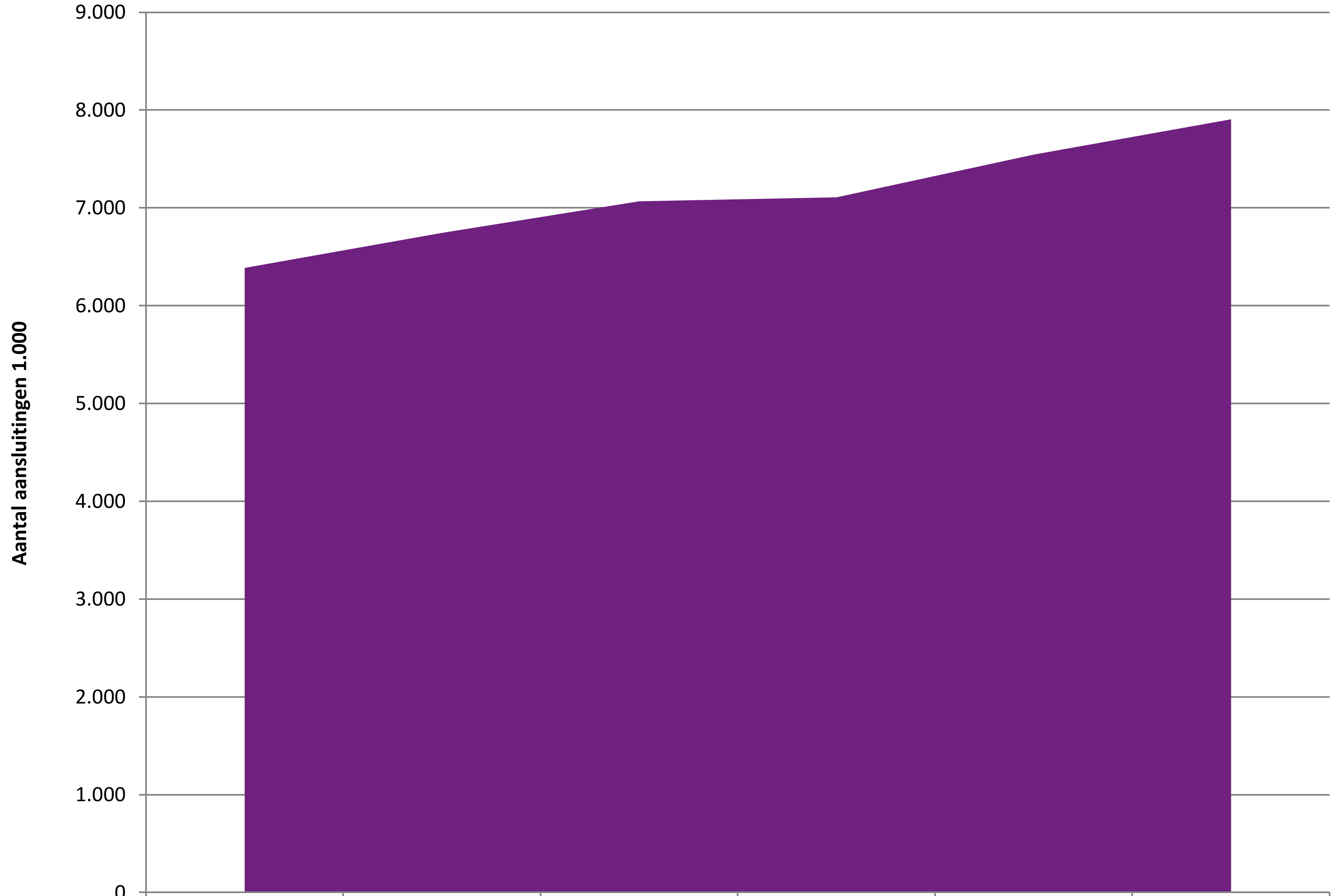
* Door de overname van Simpel door T-Mobile is Postpaid MNO met ca. 1 miljoen toegenomen en Post- en Prepaid MVNO met ca. 1 miljoen afgenomen.

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

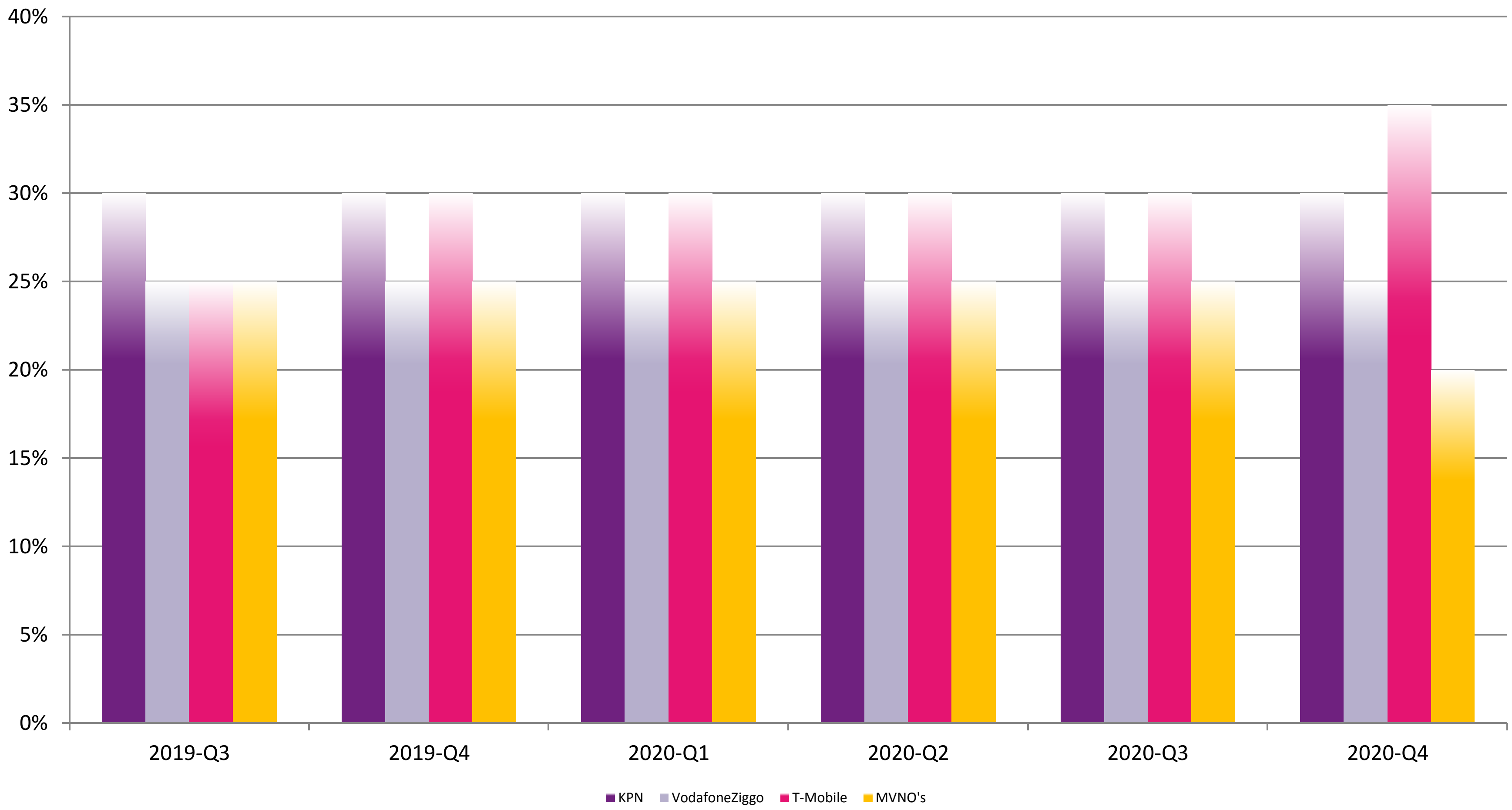


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Machine-to-Machine (M2M)	6.385	6.744	7.067	7.108	7.543	7.904

Op basis van vragen 10_A1_4_1 van de Telecommonitor

Mobile

Retail market share based on connections

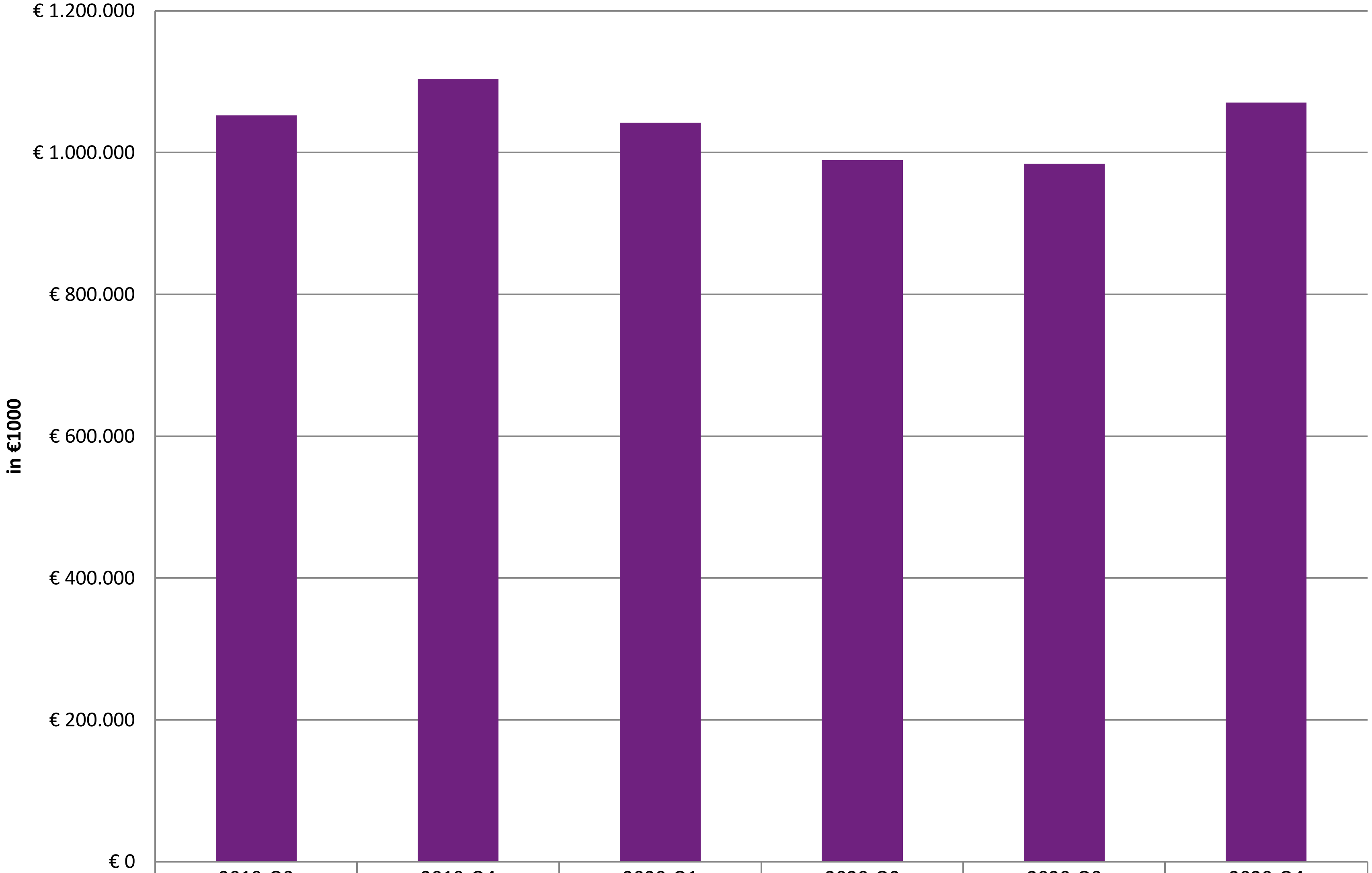


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
KPN	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
VodafoneZiggo	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]
T-Mobile	[20 - 25%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[30 - 35%]
MVNO's	[20 - 25%]	[20 - 25%]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

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)



	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Revenue	€ 1.052.244	€ 1.103.976	€ 1.041.965	€ 989.682	€ 984.064	€ 1.070.277

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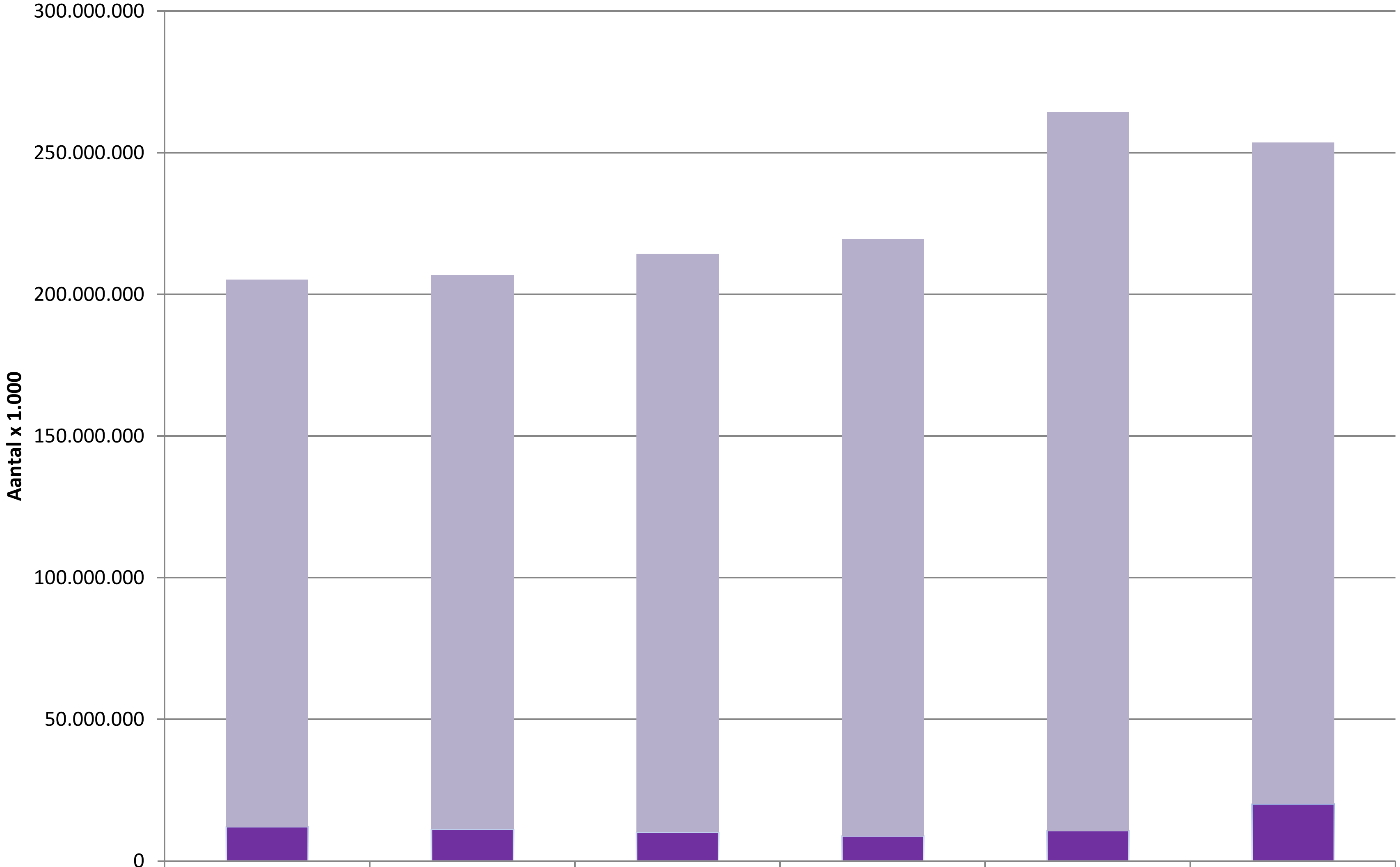
Op basis van vragen 10_A2_1-2-3-4, 10_A2_2-2-3-4, 10_A2_3-2-3-4, en 10_A2_4-2-3 van de Telecommonitor

Mobile

Retail volume 3G/4G data

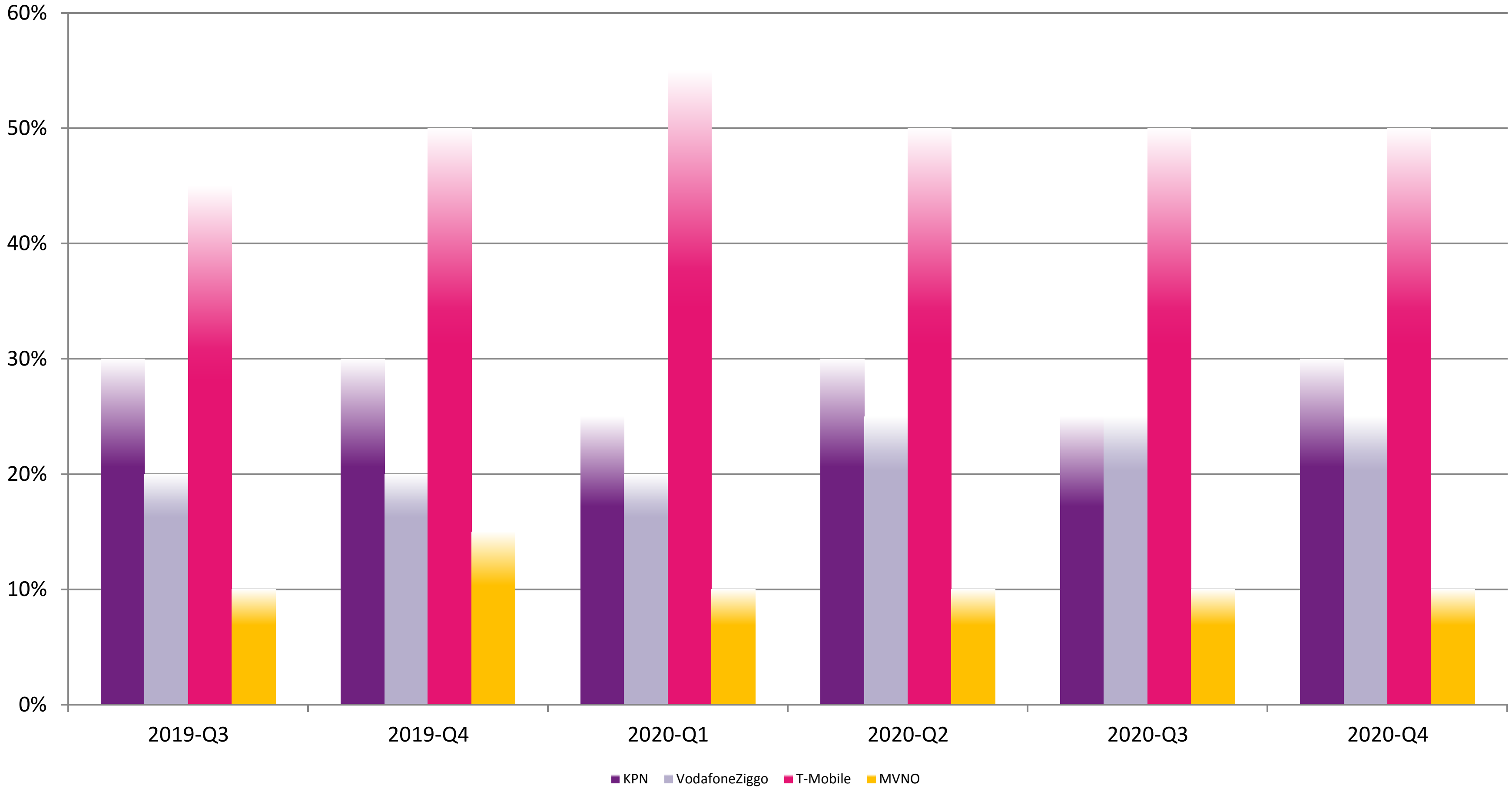


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Data 4G MB	193.147.454	195.615.160	204.120.370	210.522.896	253.544.083	233.534.835
Data 3G MB	12.103.119	11.246.871	10.212.104	8.882.108	10.785.506	20.129.301

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-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
KPN	[25 - 30%]	[25 - 30%]	[20 - 25%]	[25 - 30%]	[20 - 25%]	[25 - 30%]
VodafoneZiggo	[15 - 20%]	[15 - 20%]	[15 - 20%]	[20 - 25%]	[20 - 25%]	[20 - 25%]
T-Mobile	[40 - 45%]	[45 - 50%]	[50 - 55%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
MVNO	[5 - 10%]	[10 - 15%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]

* De overname van Simpel door T-Mobile is niet verwerkt in de marktaandelen voor mobiele dataverbruik

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

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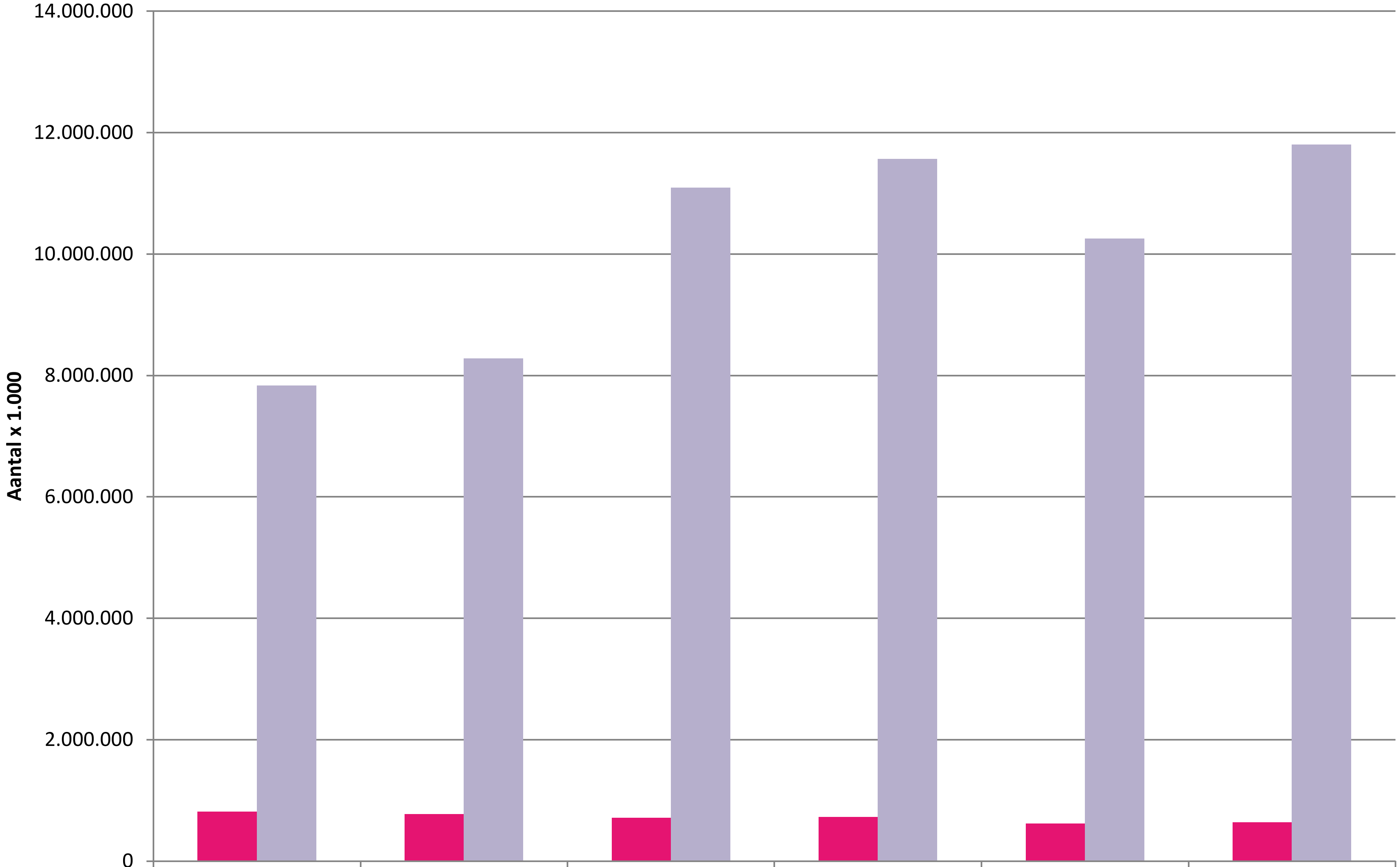
Mobile

Retail volume of voice minutes and SMS/text



	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
SMS	819.376	768.430	710.440	726.928	616.932	641.514
Minutes	7.835.272	8.274.548	11.090.374	11.565.590	10.254.548	11.803.020

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

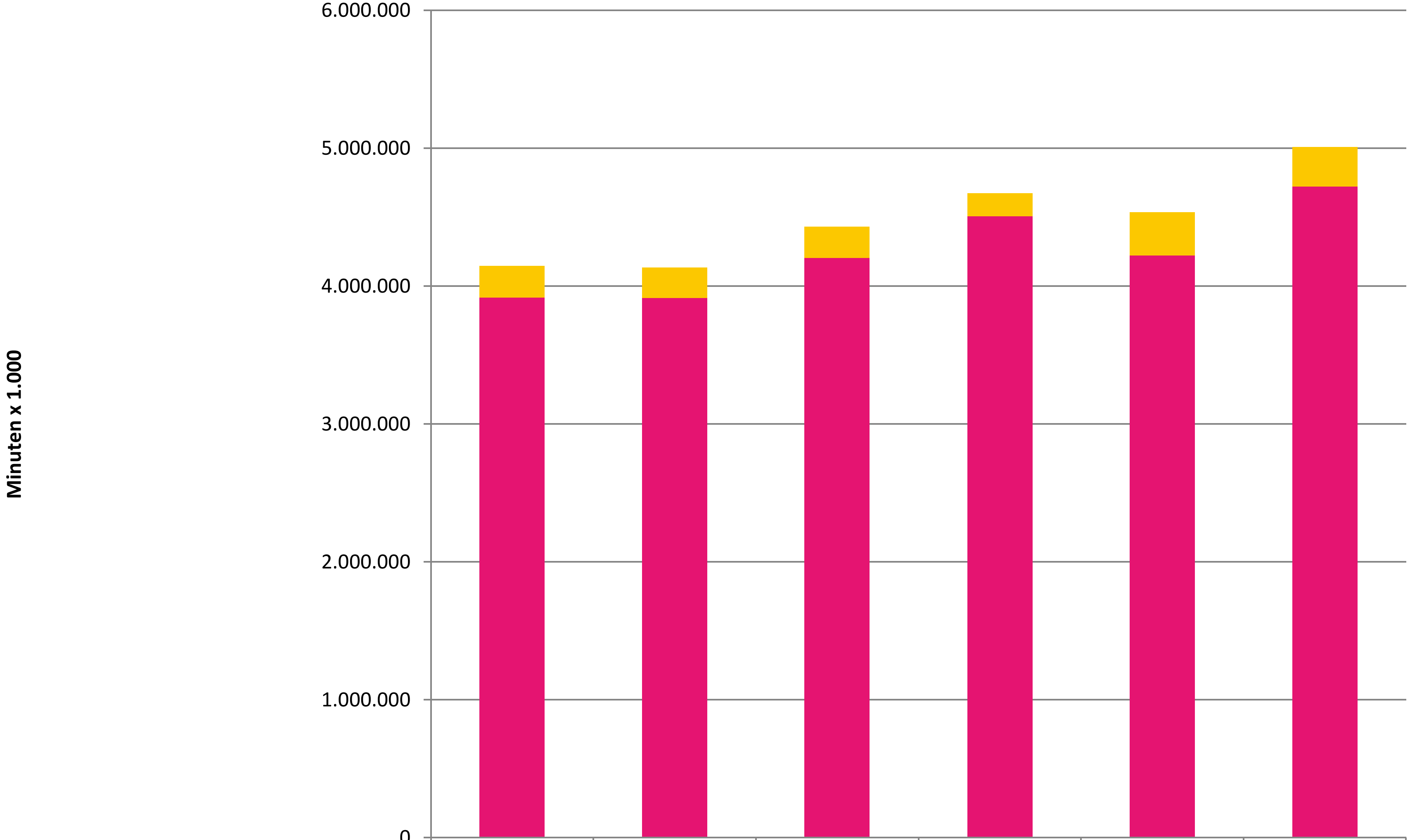
Retail market share based on consumed voice minutes

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

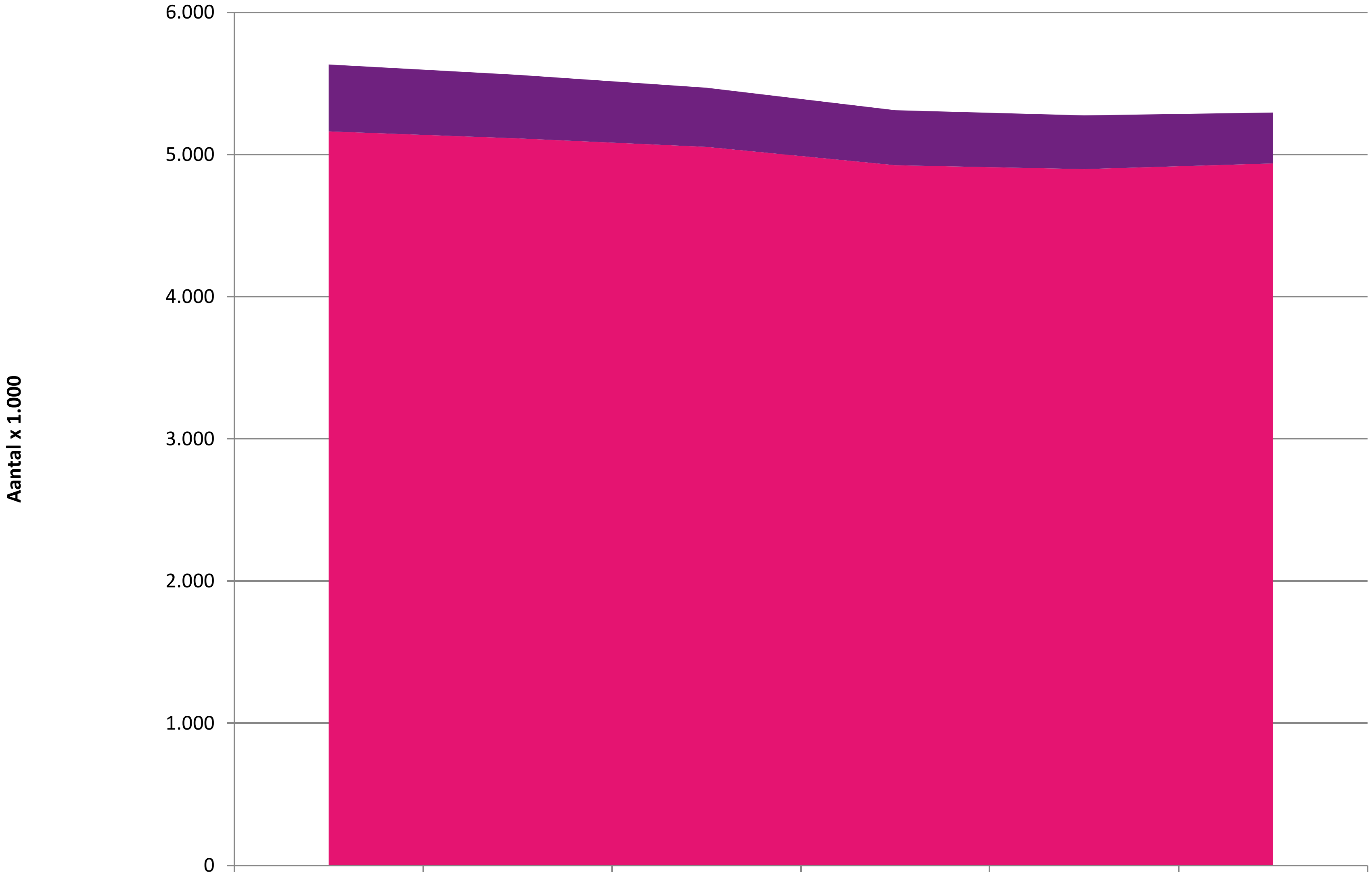


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Volume terminated from national networks	230.663	219.170	227.201	165.322	314.514	285.849
Volume terminated from abroad	3.915.591	3.913.035	4.204.771	4.507.294	4.220.924	4.723.289

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

Fixed telephony

Retail single connections

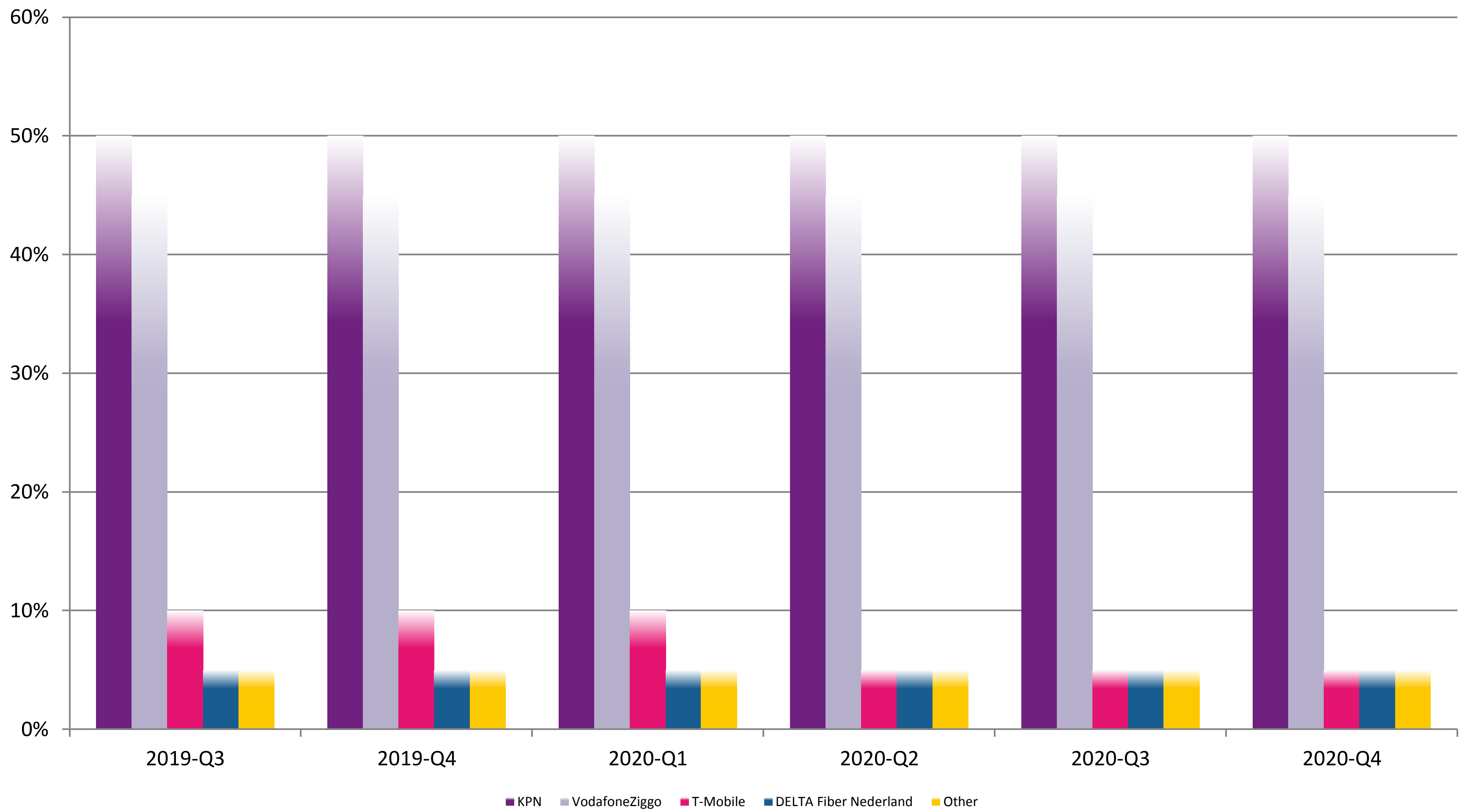


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
PSTN	470	446	417	388	378	357
VoB Single connection	5.161	5.113	5.052	4.924	4.896	4.937

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



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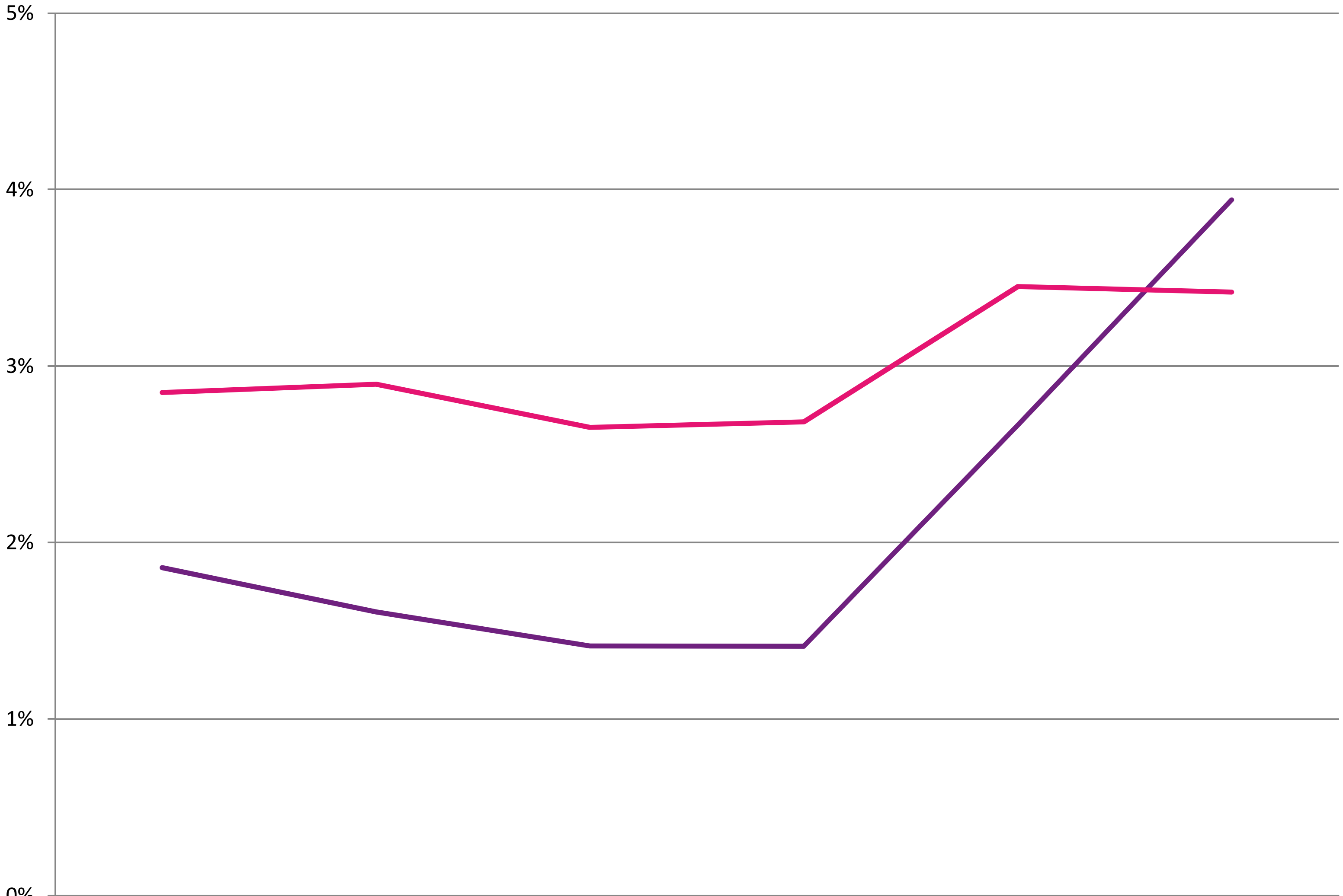
	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
KPN	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
VodafoneZiggo	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 5%]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



	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Adds	1,86%	1,61%	1,41%	1,41%	2,66%	3,94%
Disconnects	2,85%	2,90%	2,65%	2,68%	3,45%	3,42%

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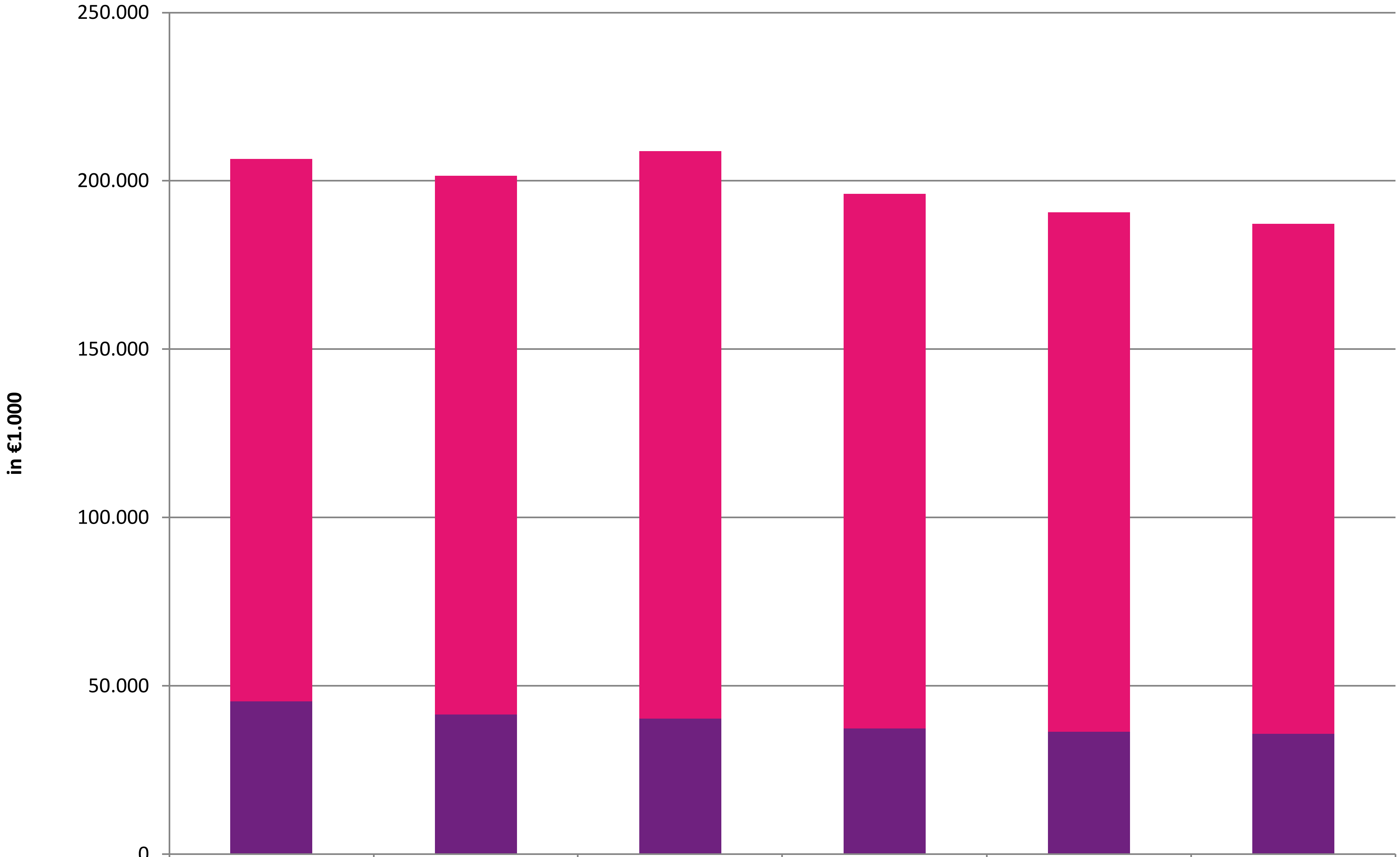
Op basis van vragen 20_A2_1_1-2 en 20_A2_7_1-2 van de Telecommonitor

Fixed telephony

Retail turnover PSTN and VoB



	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Revenue VoB	161.067	160.029	168.542	158.781	154.215	151.446
Revenue PSTN	45.380	41.476	40.293	37.280	36.398	35.745

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

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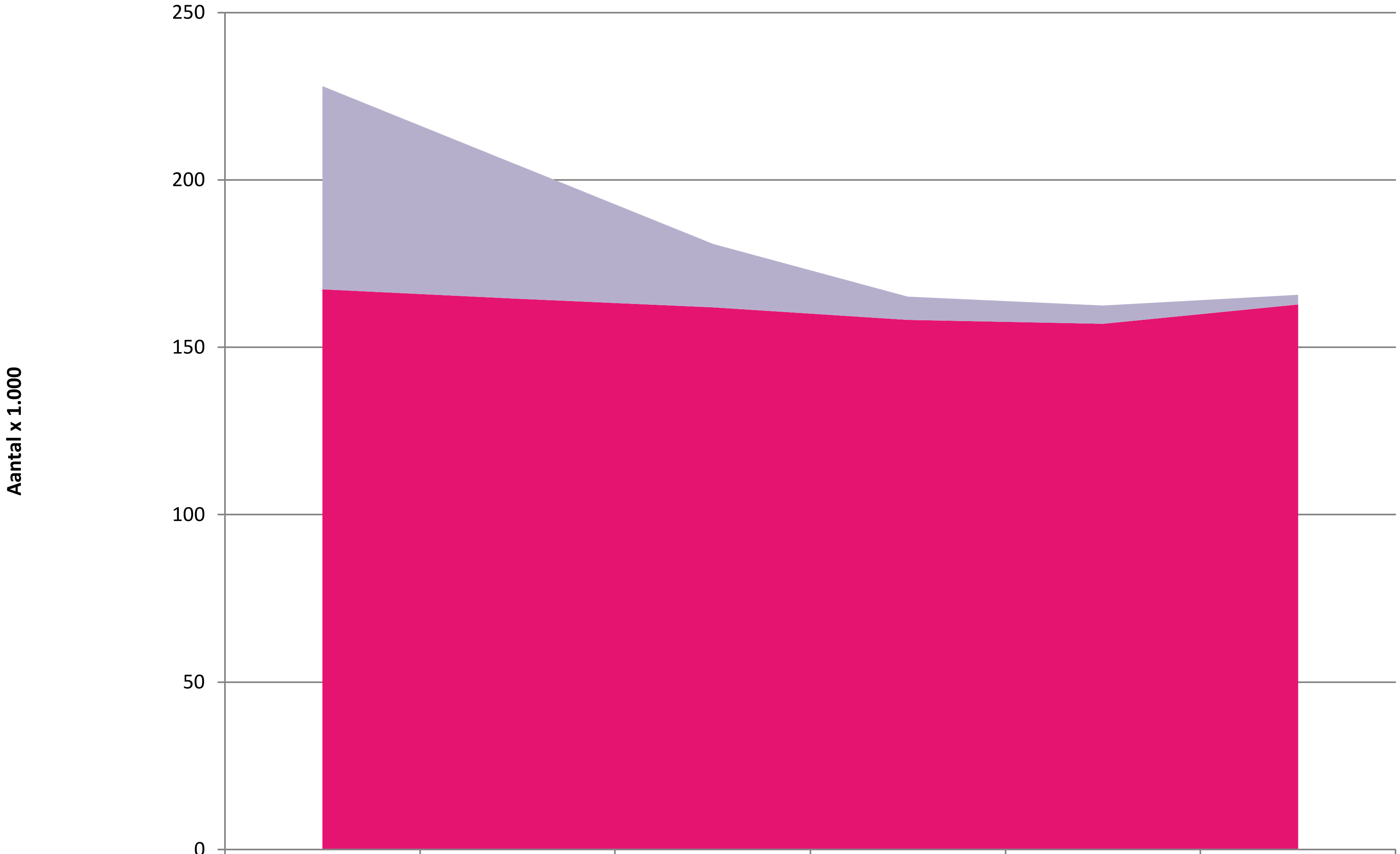
Fixed telephony

Retail dual connections

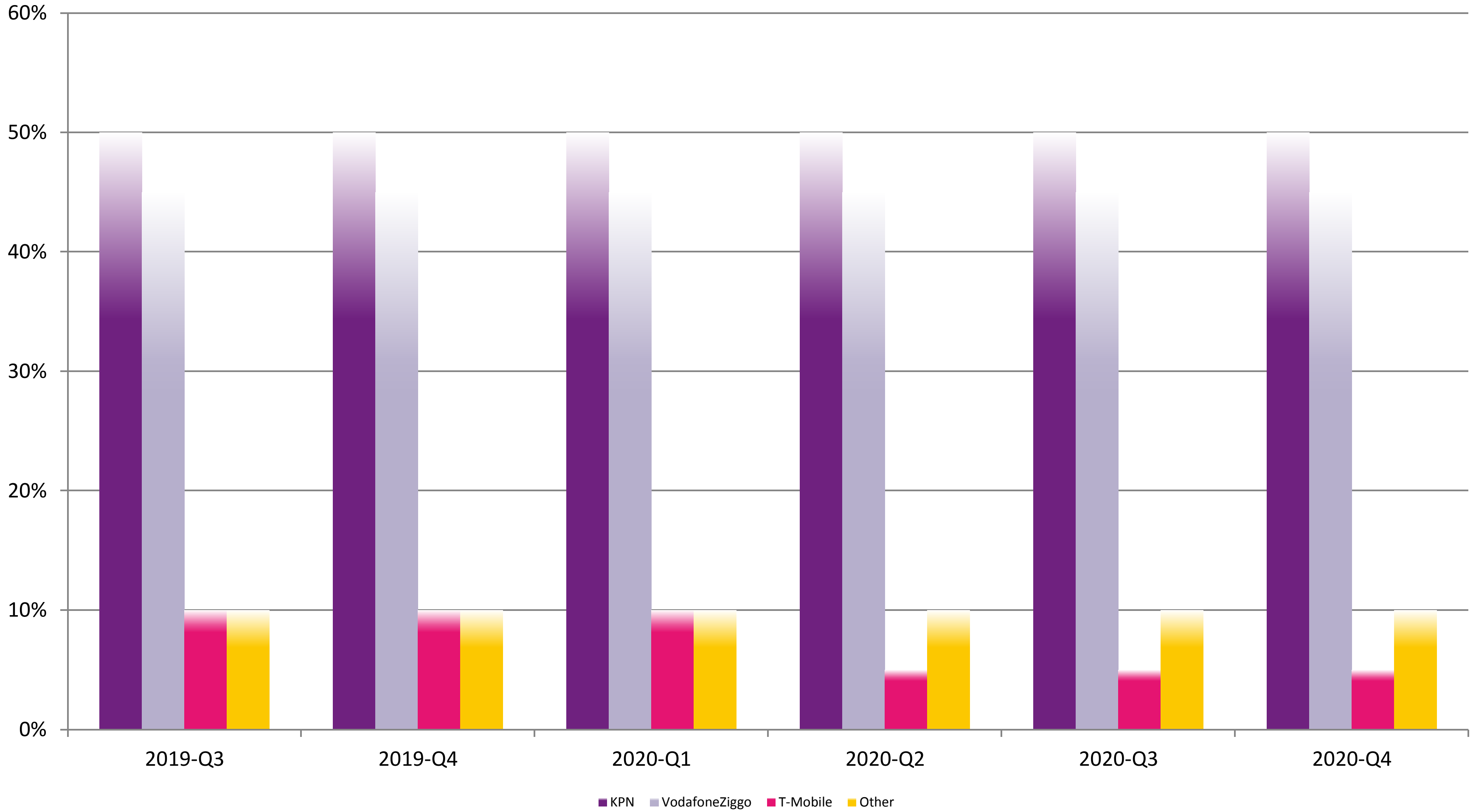


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
ISDN1 and ISDN2	61	40	19	7	5	3
VoB Dual connection	167	164	162	158	157	163

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-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
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%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
Other	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]

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-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Adds	0,12%	0,32%	0,44%	0,48%	1,97%	7,79%
Disconnects	16,04%	12,75%	14,31%	7,68%	2,83%	9,95%

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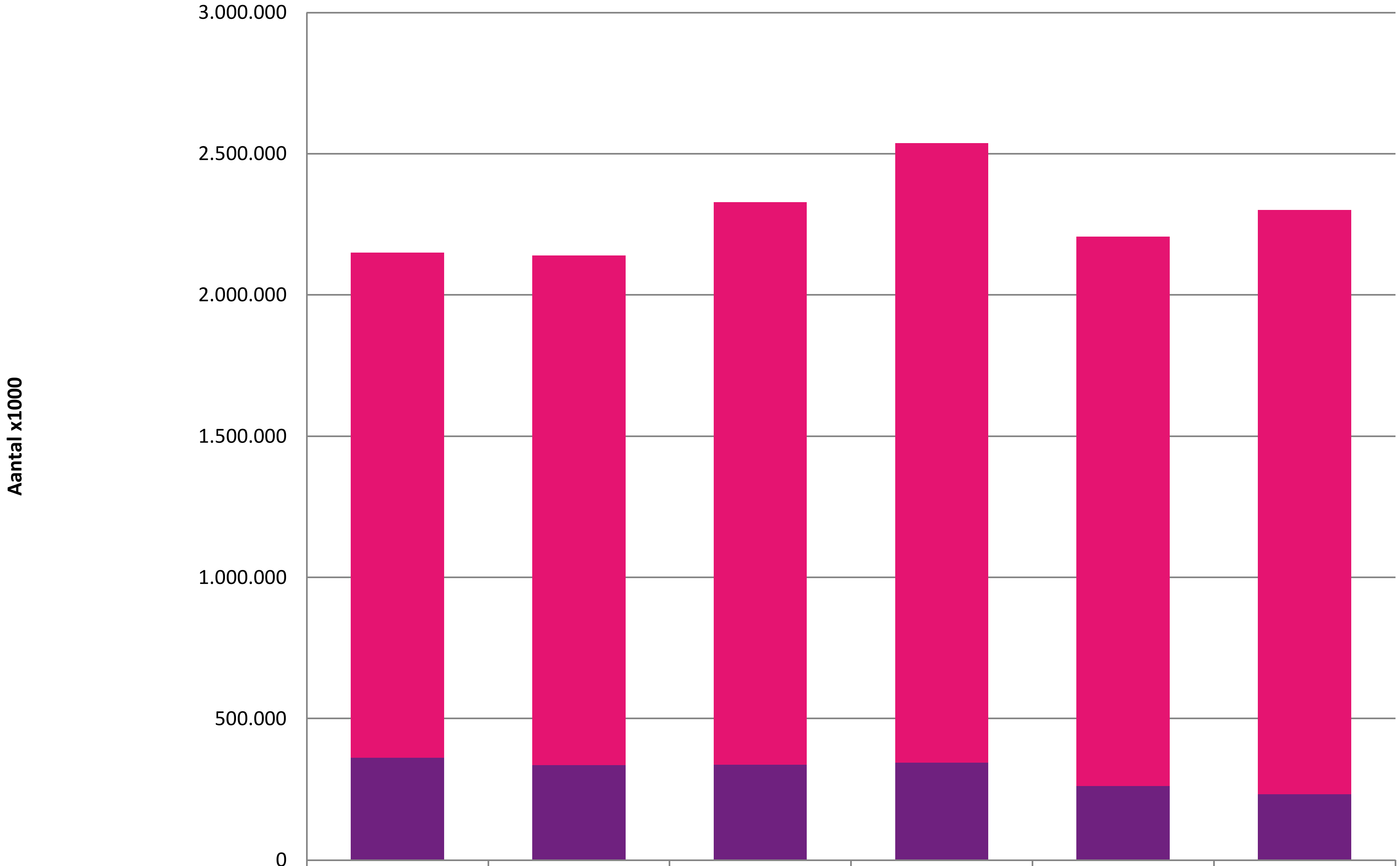
Op basis van vragen 20_A2_2_1-2, 20_A2_3_1-2 en 20_A2_8_1-2 van de Telecommonitor

Fixed telephony

Retail volume based on voice minutes

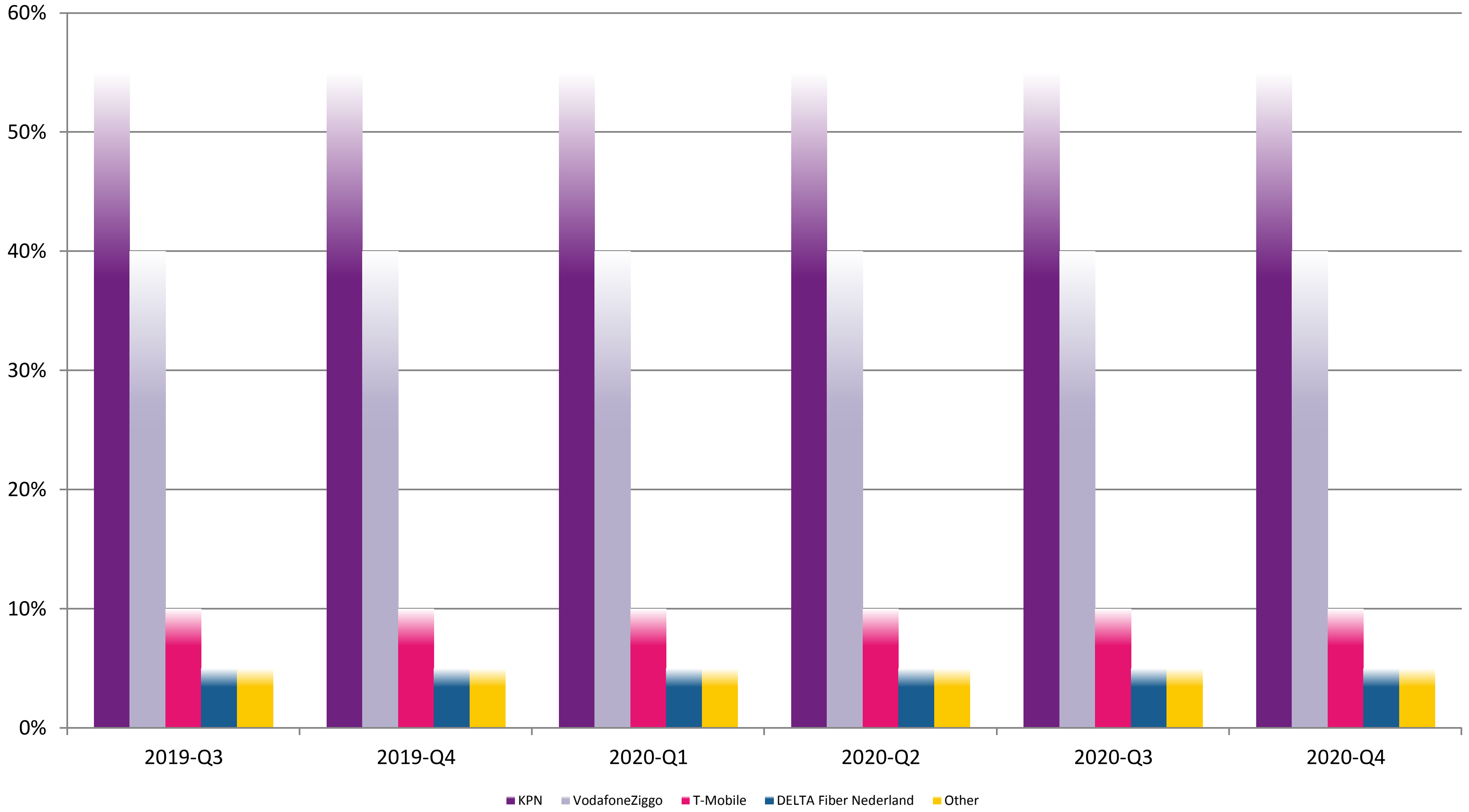


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Minutes broadband	1.787.671	1.803.453	1.989.725	2.192.150	1.942.919	2.067.688
Minutes traditional telephony	361.880	335.832	338.149	344.102	262.852	232.227

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

Fixed telephony

Retail market share based on voice minutes

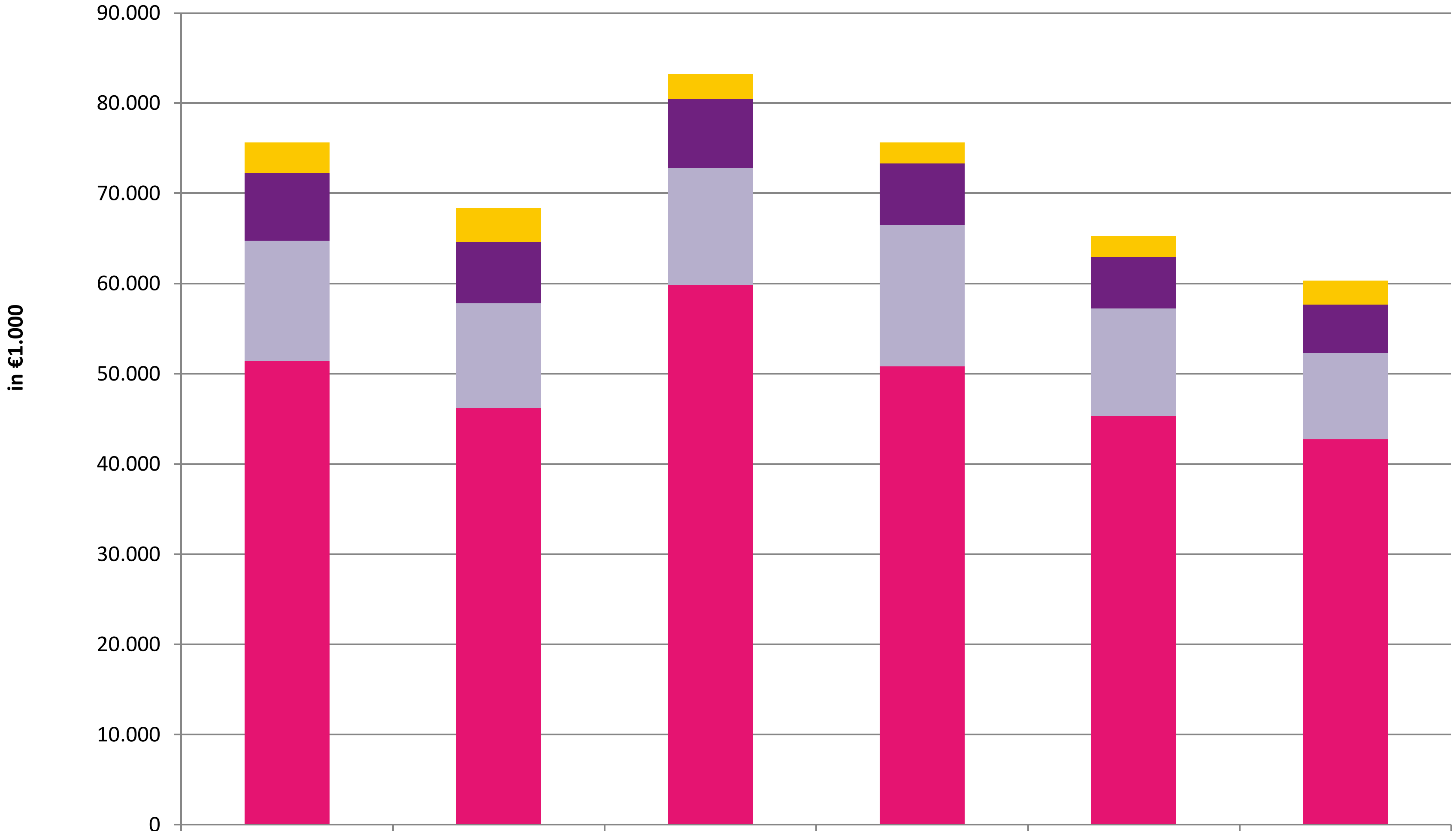


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
KPN	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]
VodafoneZiggo	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 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 20_A4_2_1-2-3-4 van de Telecommonitor

Fixed telephony

Retail turnover per type of traffic



	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Other	3.366	3.701	2.823	2.308	2.276	2.654
International	7.504	6.826	7.575	6.874	5.701	5.371
Mobile national	13.409	11.640	13.013	15.648	11.914	9.527
Fixed national	51.377	46.189	59.860	50.824	45.339	42.761

Autoriteit Consument & Markt

Op basis van vragen 20_A3_11_1-2-3-4 van de Telecommonitor

Broadband

Retail connections per type

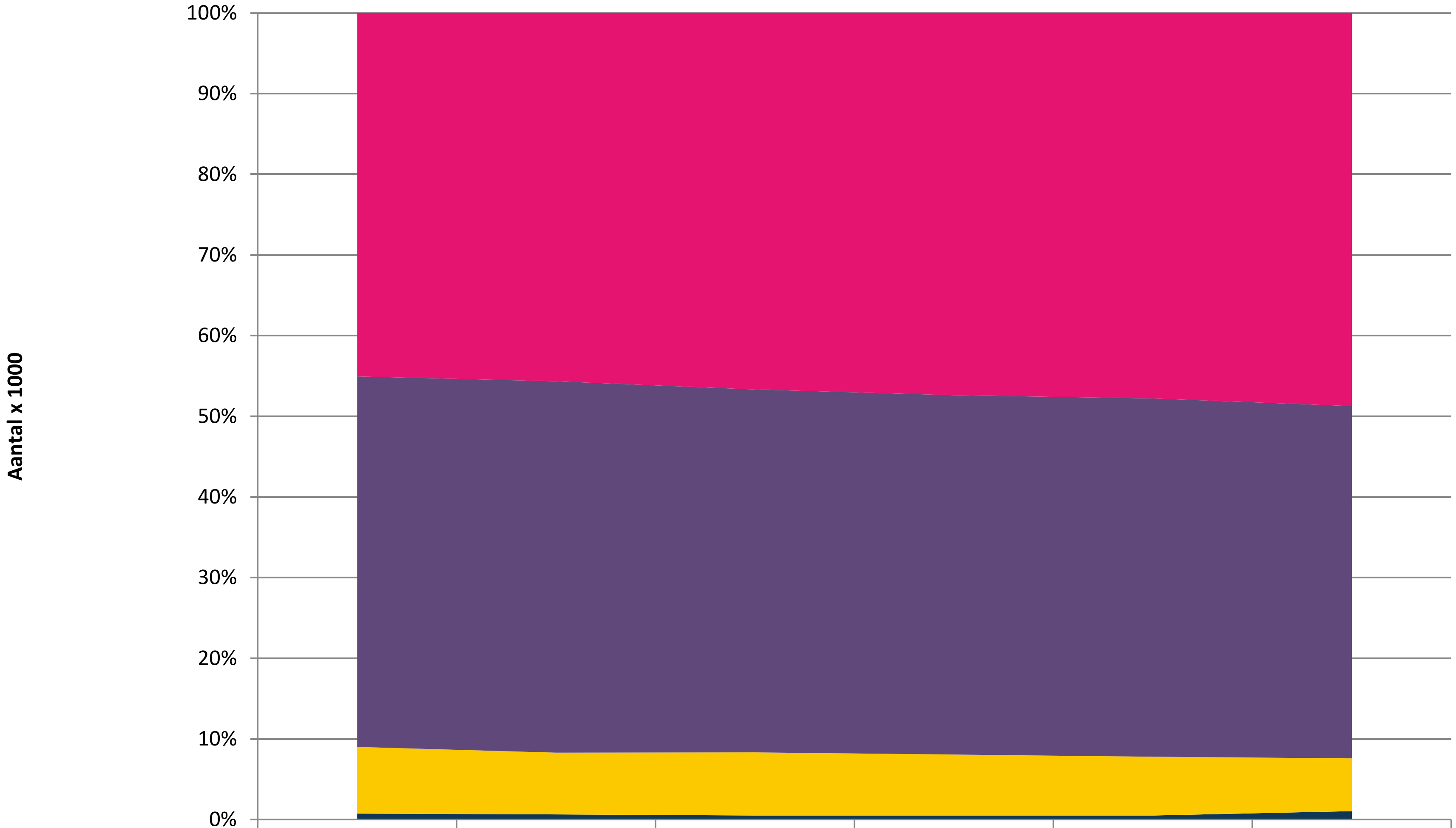
	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
DSL	2.582	2.562	2.512	2.479	2.465	2.417
Cable	3.501	3.511	3.515	3.520	3.511	3.502
Fiber	1.349	1.386	1.428	1.477	1.537	1.606

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

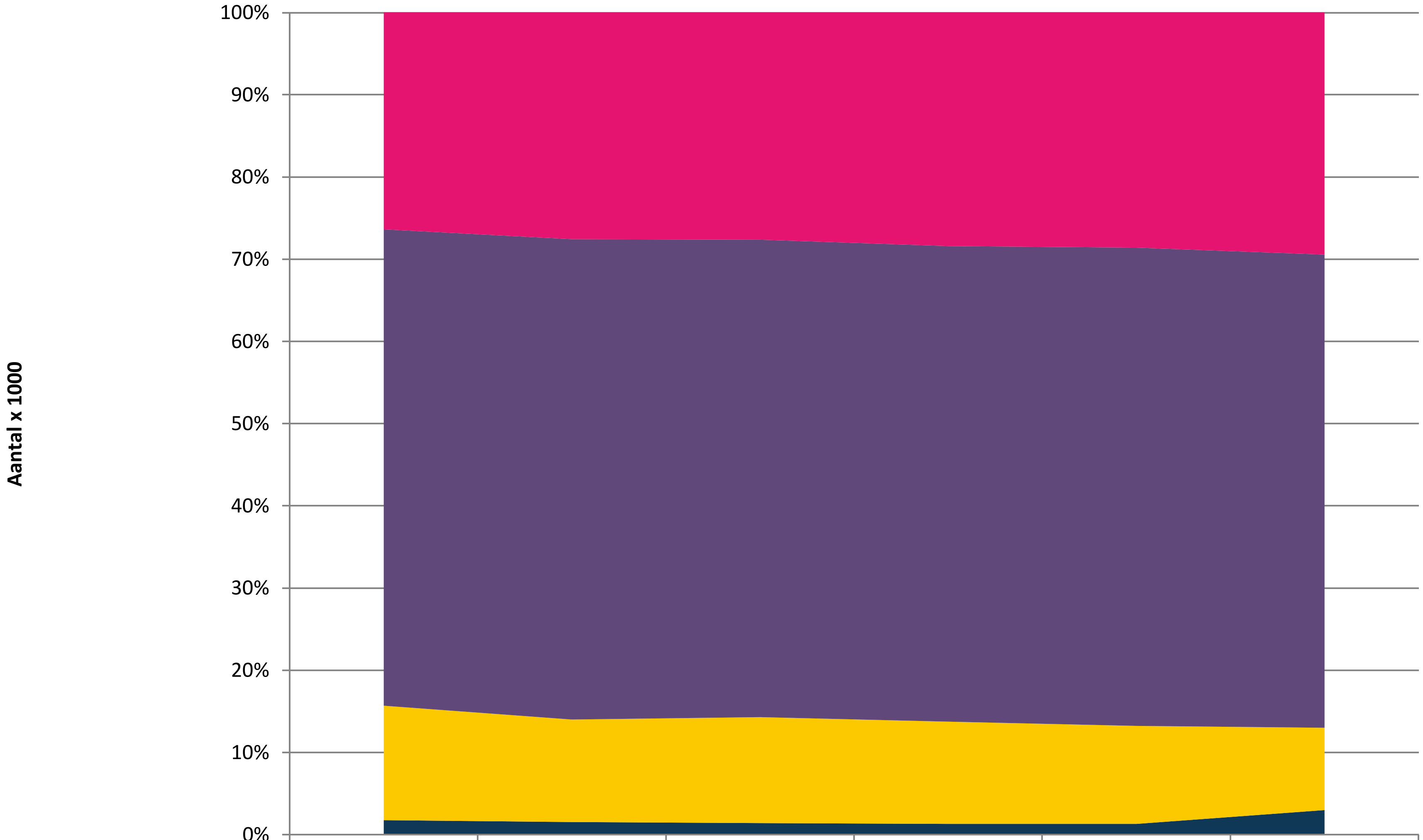


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
≥ 100 Mbps	45,1%	45,7%	46,7%	47,4%	47,8%	48,75%
≥ 30 Mbps, < 100 Mbps	45,9%	46,0%	45,0%	44,6%	44,4%	43,65%
≥ 10 Mbps, < 30 Mbps	8,3%	7,7%	7,8%	7,6%	7,3%	6,56%
< 10 Mbps	0,7%	0,6%	0,5%	0,5%	0,5%	1,03%

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

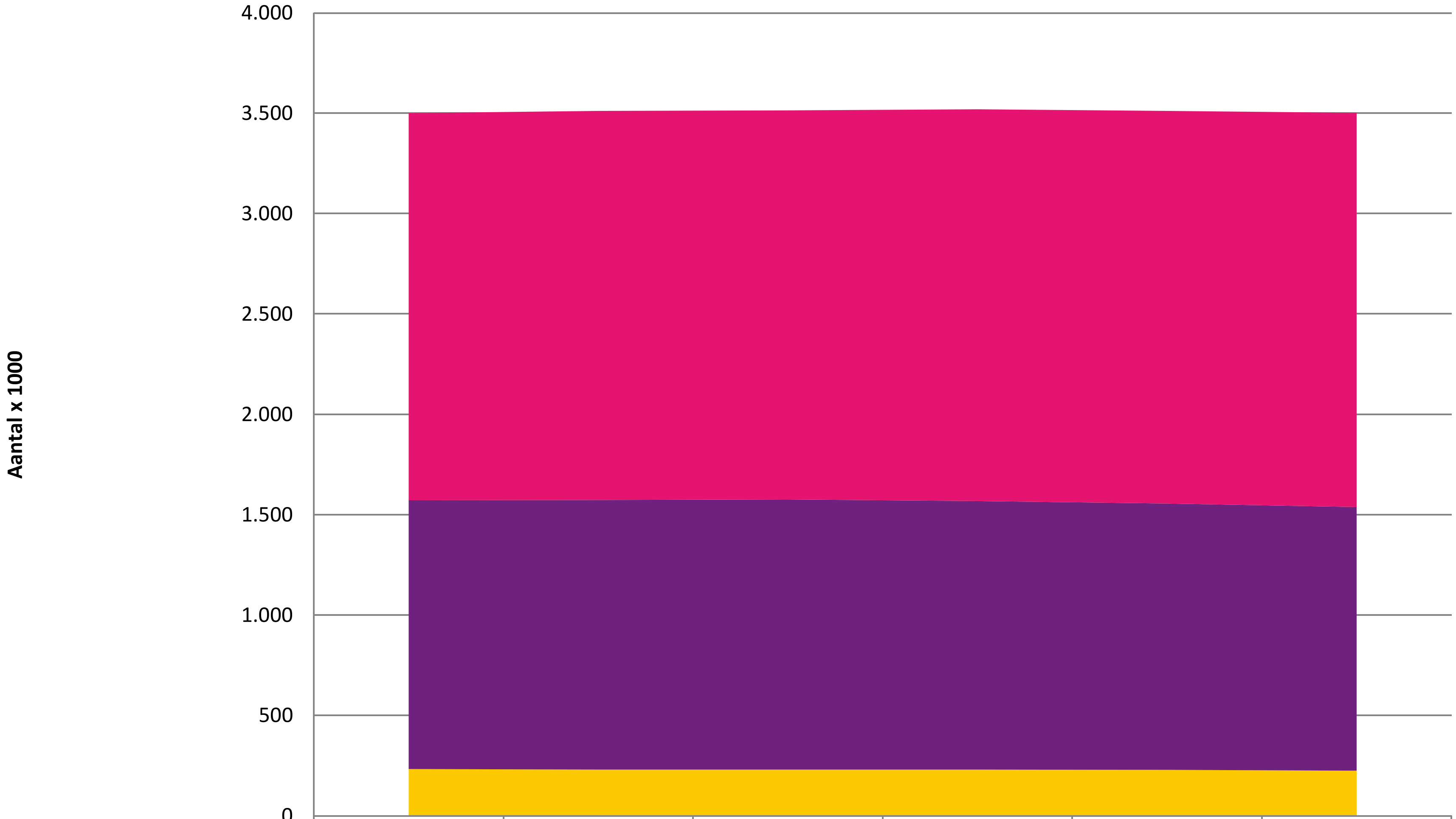


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
DSL ≥ 100 Mbps	680	705	693	703	704	711
DSL ≥ 30 Mbps, < 100 Mbps	1.493	1.494	1.458	1.432	1.432	1.389
DSL ≥ 10 Mbps, < 30 Mbps	359	318	323	308	293	242
DSL ≥ 2Mbps, < 10 Mbps	46	40	35	33	33	72

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

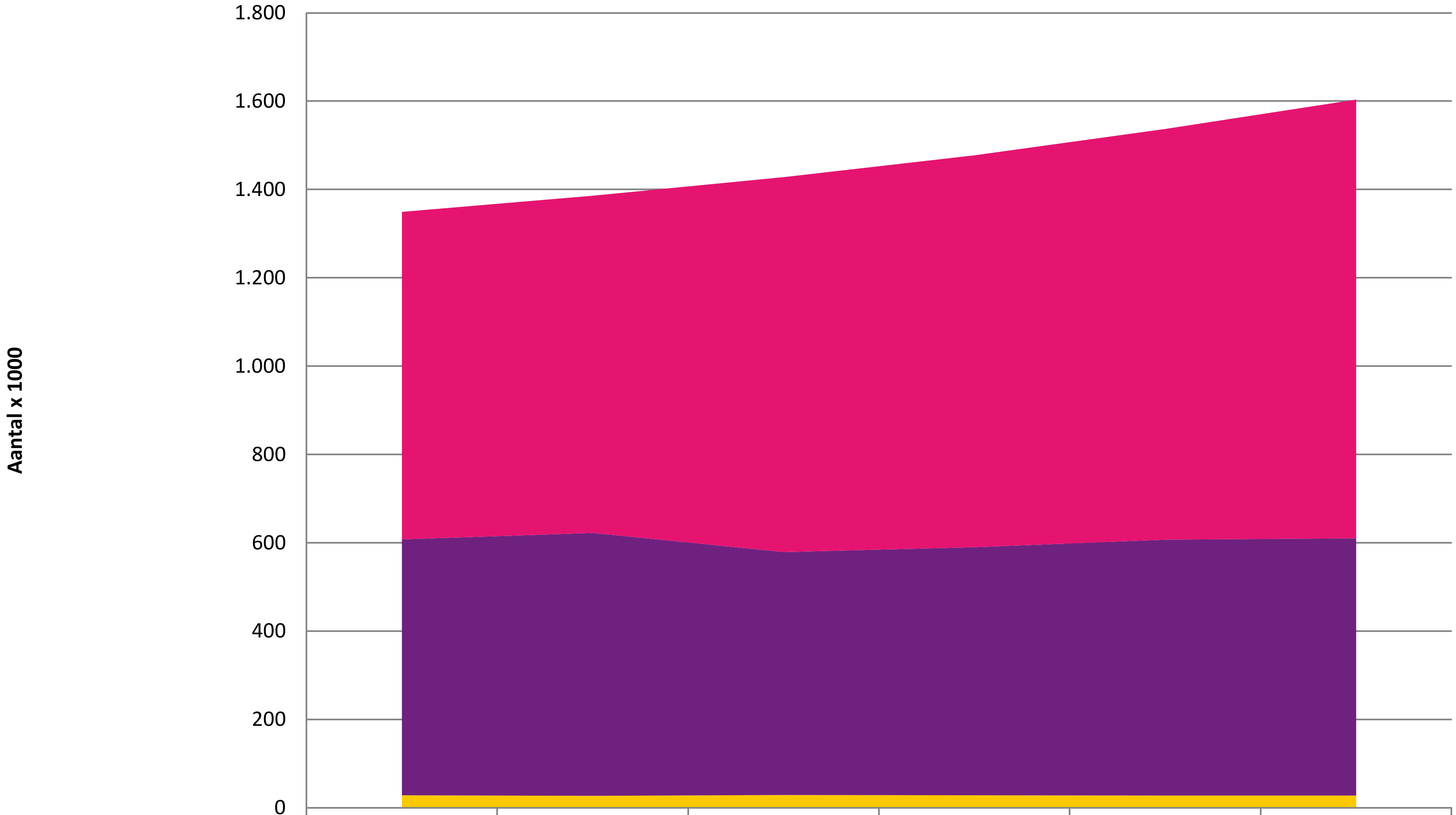


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Cable ≥ 100 Mbps	1.929	1.938	1.939	1.952	1.956	1.964
Cable ≥ 30 Mbps, < 100 Mbps	1.339	1.343	1.345	1.337	1.327	1.312
Cable ≥ 10 Mbps, < 30 Mbps	230	227	231	230	228	225
Cable ≥ 2 Mbps, < 10 Mbps	3	3	0	0	0	0

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

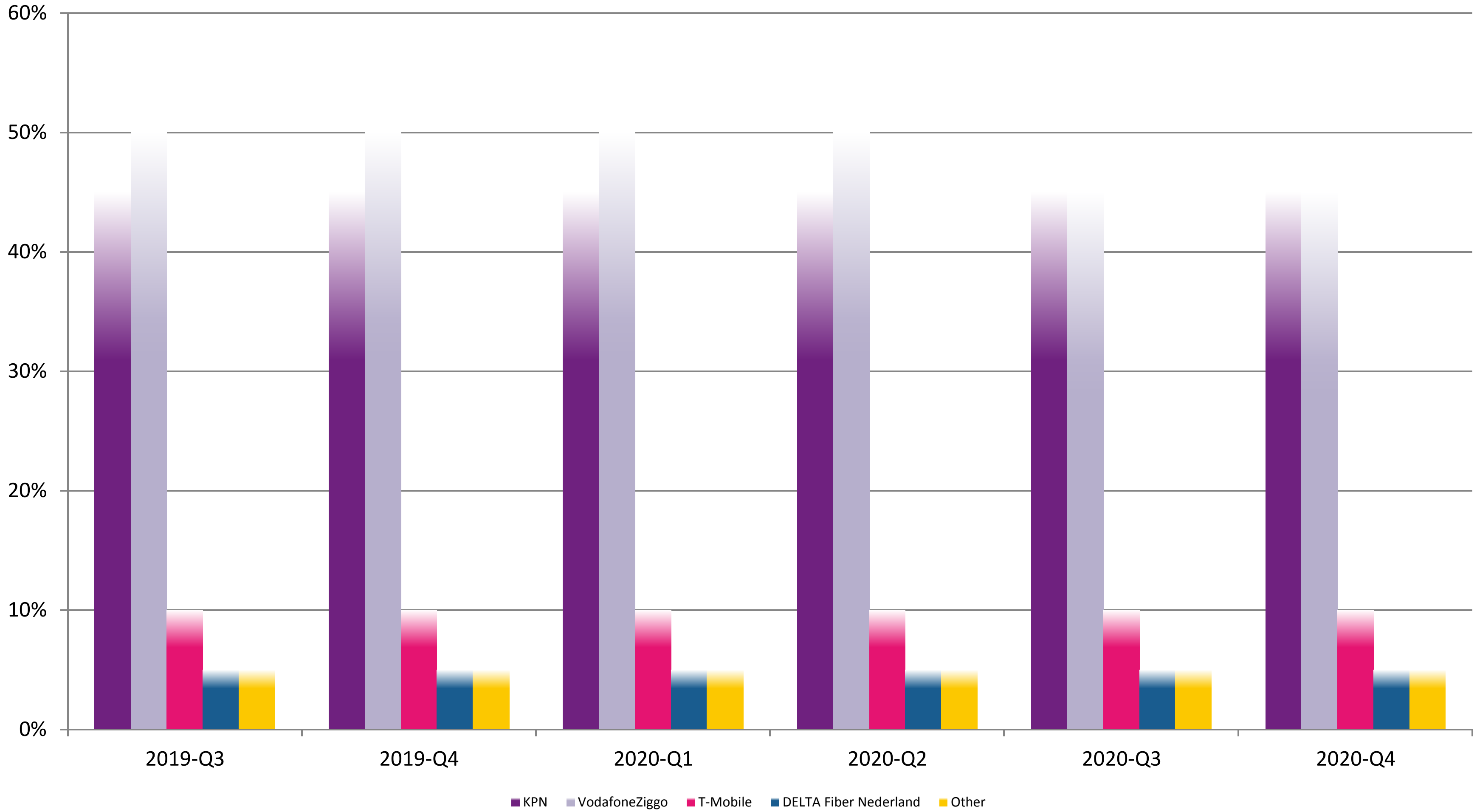


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Fiber ≥ 100 Mbps	742	764	848	887	930	994
Fiber ≥ 30 Mbps, < 100 Mbps	579	595	551	562	579	583
Fiber ≥ 10 Mbps, < 30 Mbps	28	26	28	27	27	27
Fiber ≥ 2 Mbps, < 10 Mbps	1	0	0	0	0	0

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



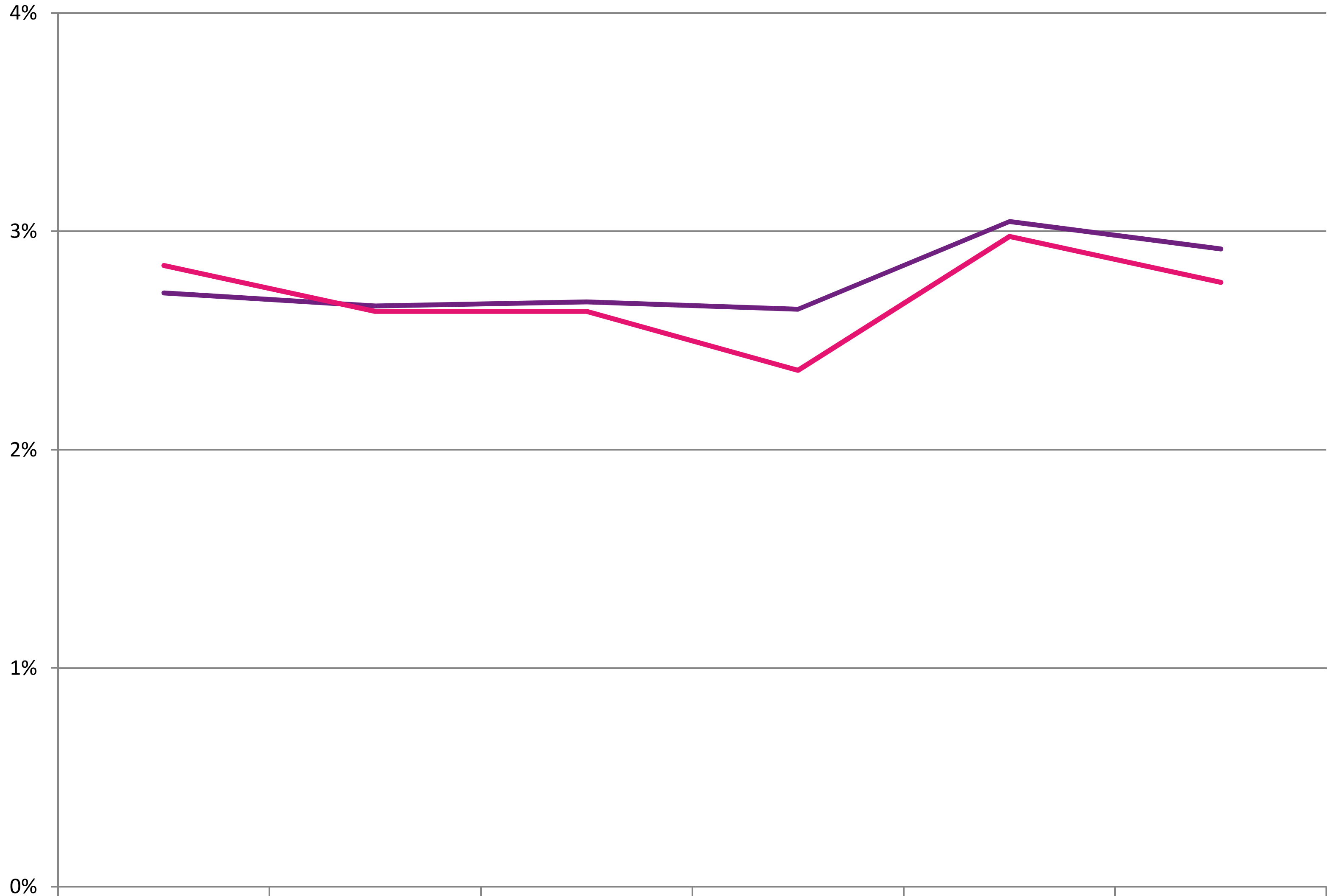
Autoriteit Consument & Markt

	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
KPN	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
VodafoneZiggo	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[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

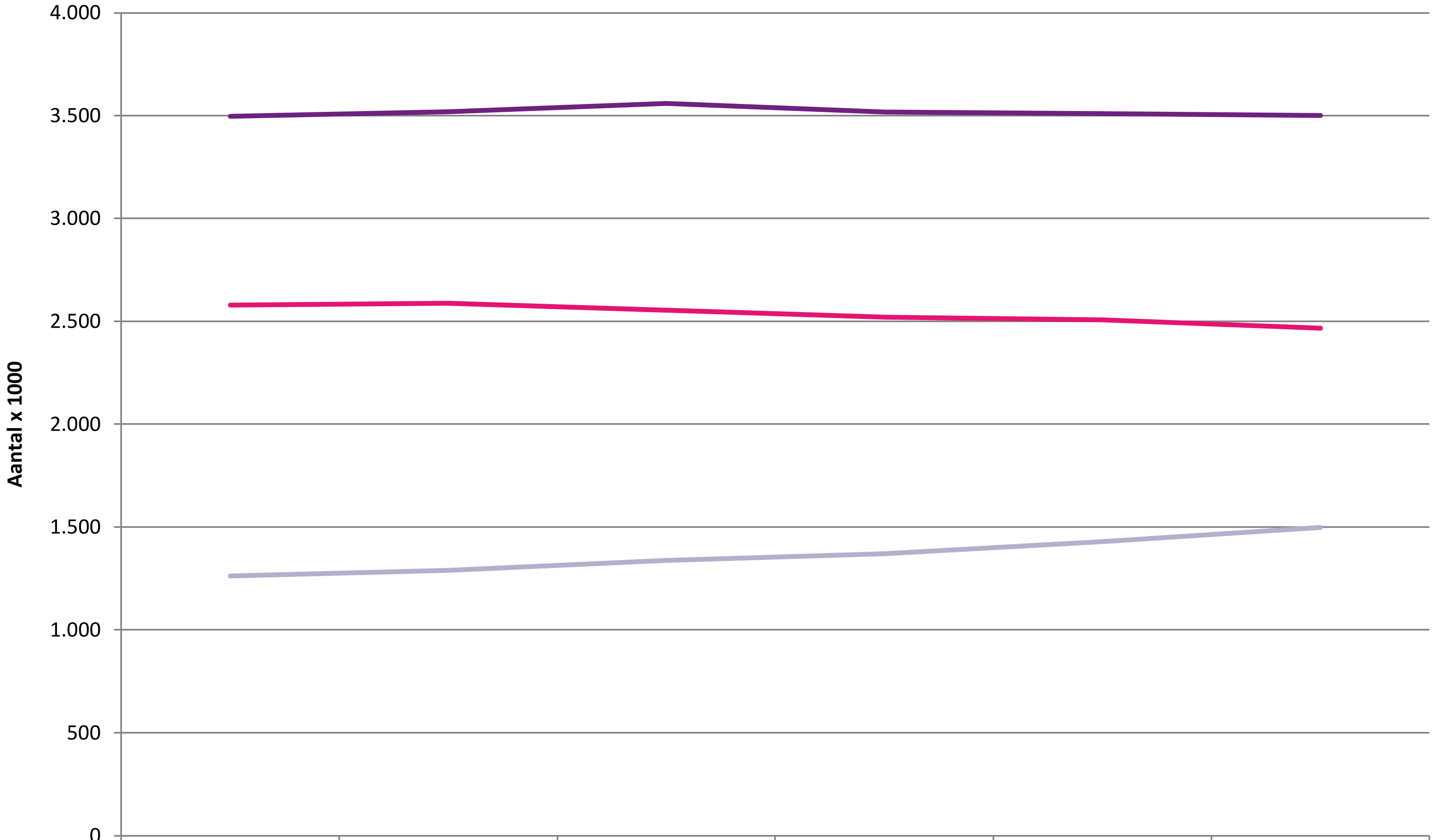


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Adds	2,72%	2,66%	2,68%	2,64%	3,05%	2,92%
Disconnects	2,84%	2,63%	2,63%	2,36%	2,98%	2,77%

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

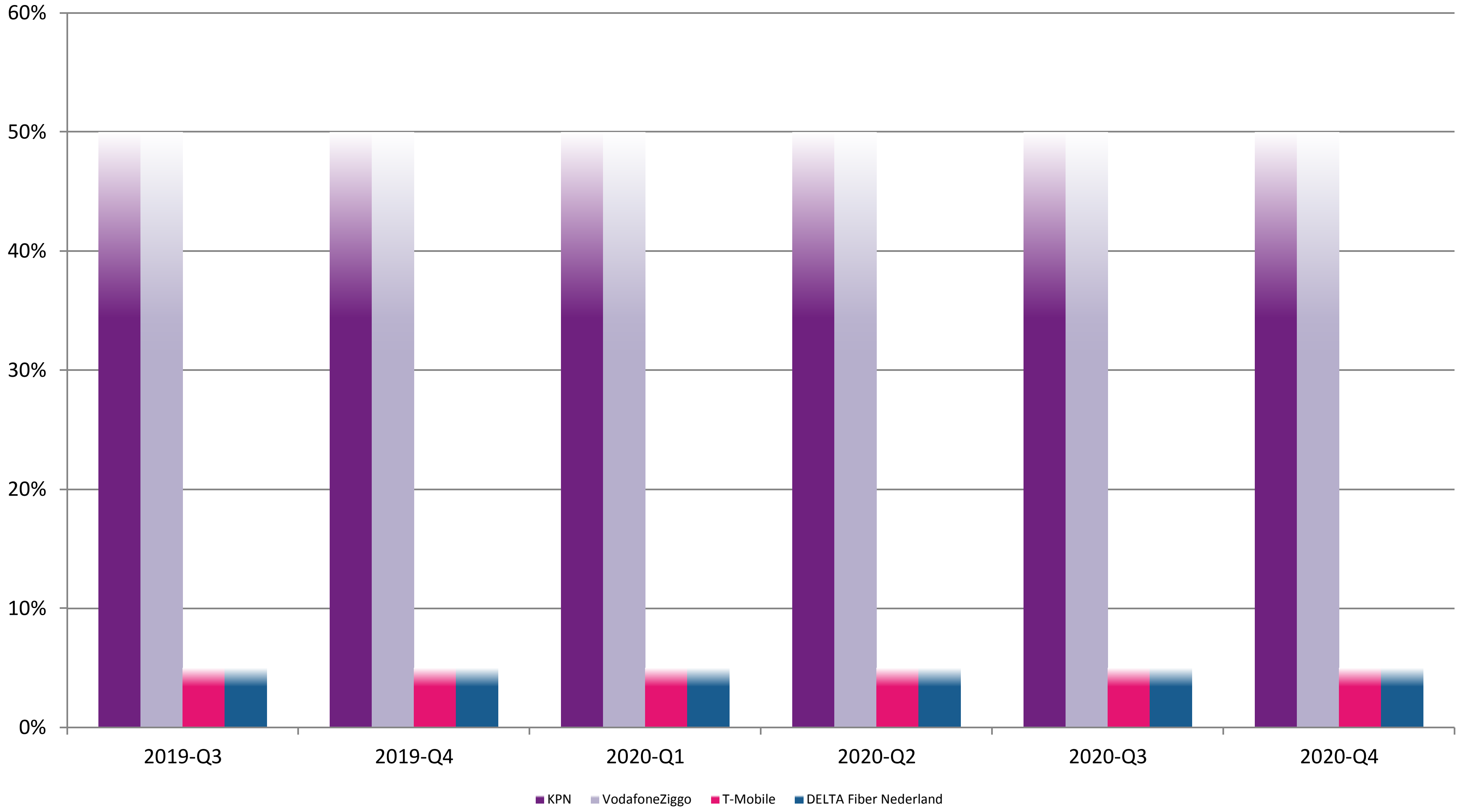


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
DSL	2.579	2.588	2.553	2.520	2.507	2.467
Cable	3.497	3.519	3.558	3.517	3.509	3.500
Fiber	1.263	1.289	1.338	1.371	1.429	1.498

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

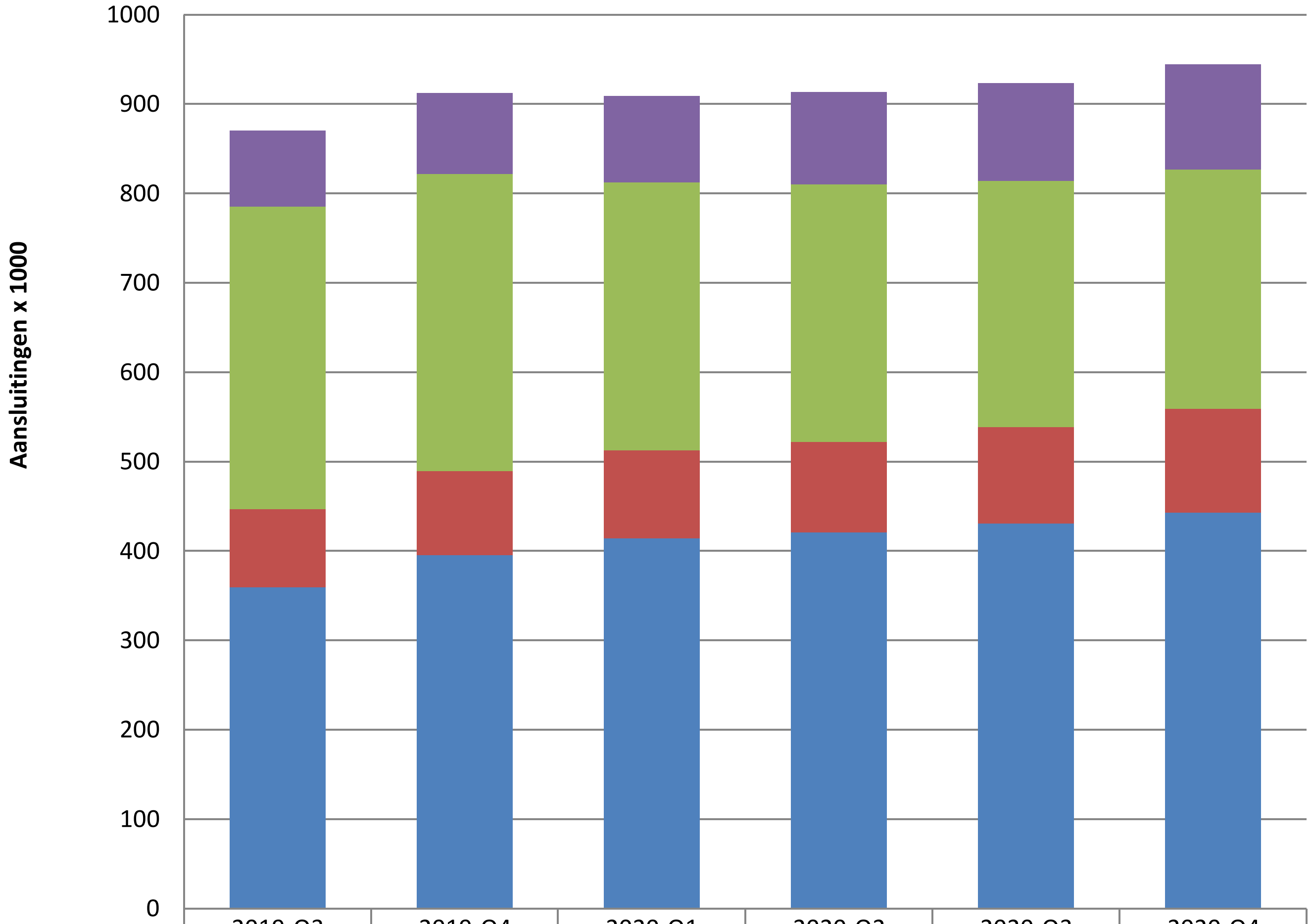


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
KPN	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
VodafoneZiggo	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
T-Mobile	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 5%]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



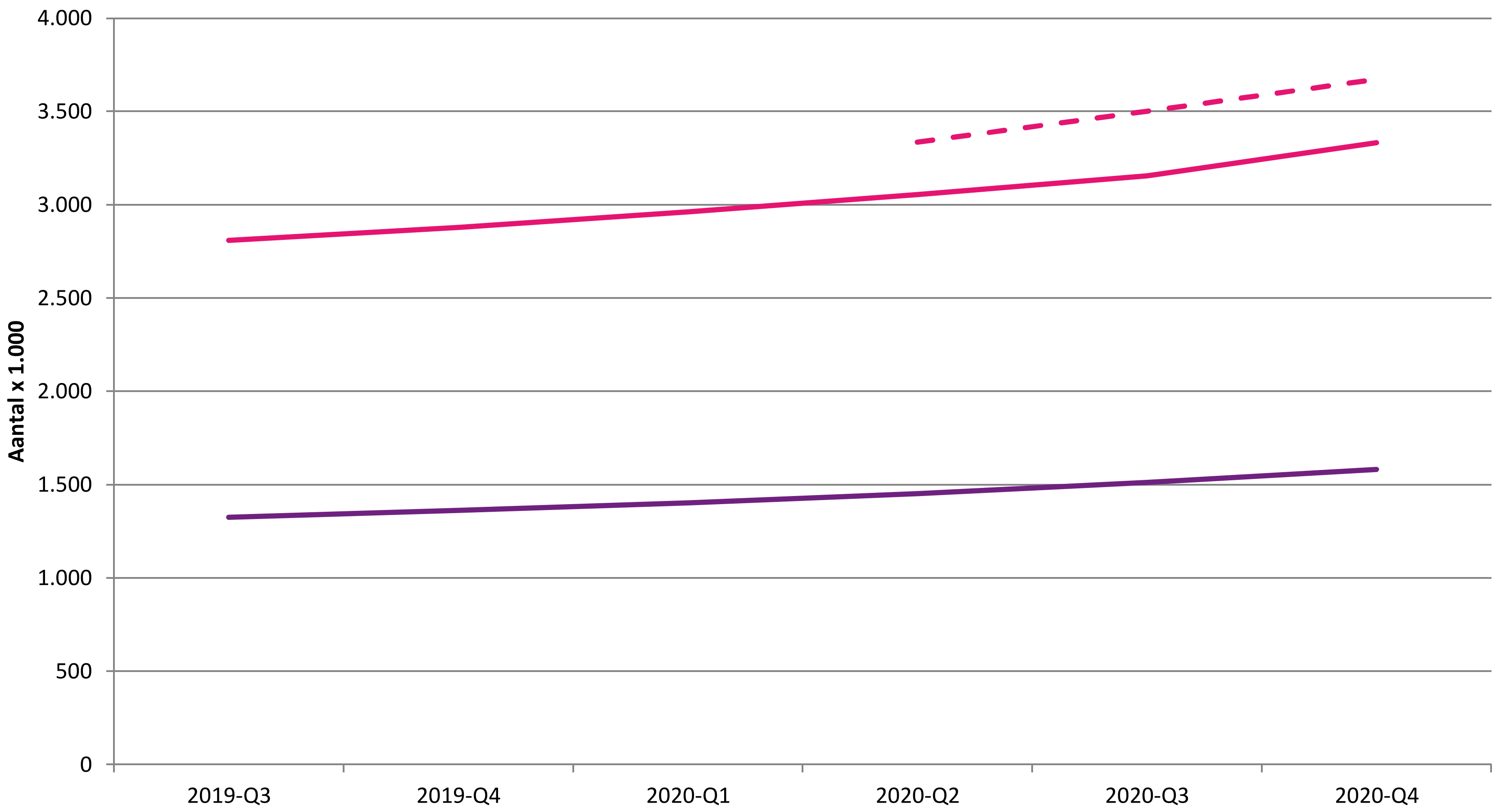
	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Unbundled Local Loop Fiber (FttH)	85	90	96	103	109	117
(Virtual) Unbundles Local Loop Copper	338	333	299	288	275	268
Purchase of active fiber optic connections (FttH)	87	94	99	101	108	116
Purchase of active copper connections	360	396	414	421	431	443

Autoriteit Consument & Markt

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-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Homes passed fiber	2.809	2.878	2.962	3.054	3.154	3.333
*Homes passed kleine/regionale glasvezelaanbieders**	-	-	-	282	-	336
Homes activated fiber	1.326	1.362	1.402	1.452	1.512	1.581

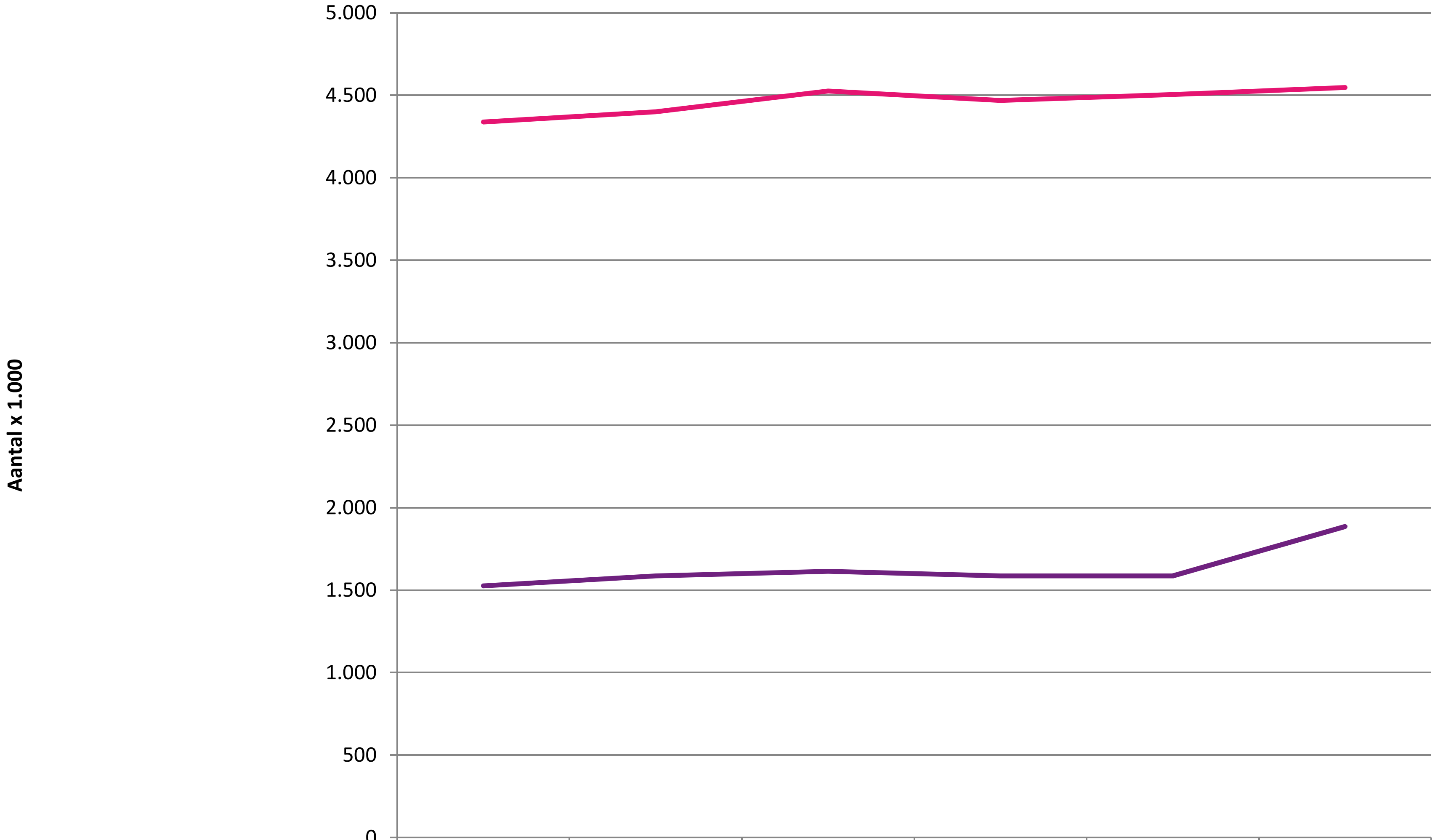
* De ACM heeft in het kader van de Telecommontitor vijftien kleine en regionale glasvezelaanbieders toegevoegd aan haar reguliere uitvraag.

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

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

Broadband

Homes connected to upgraded copper

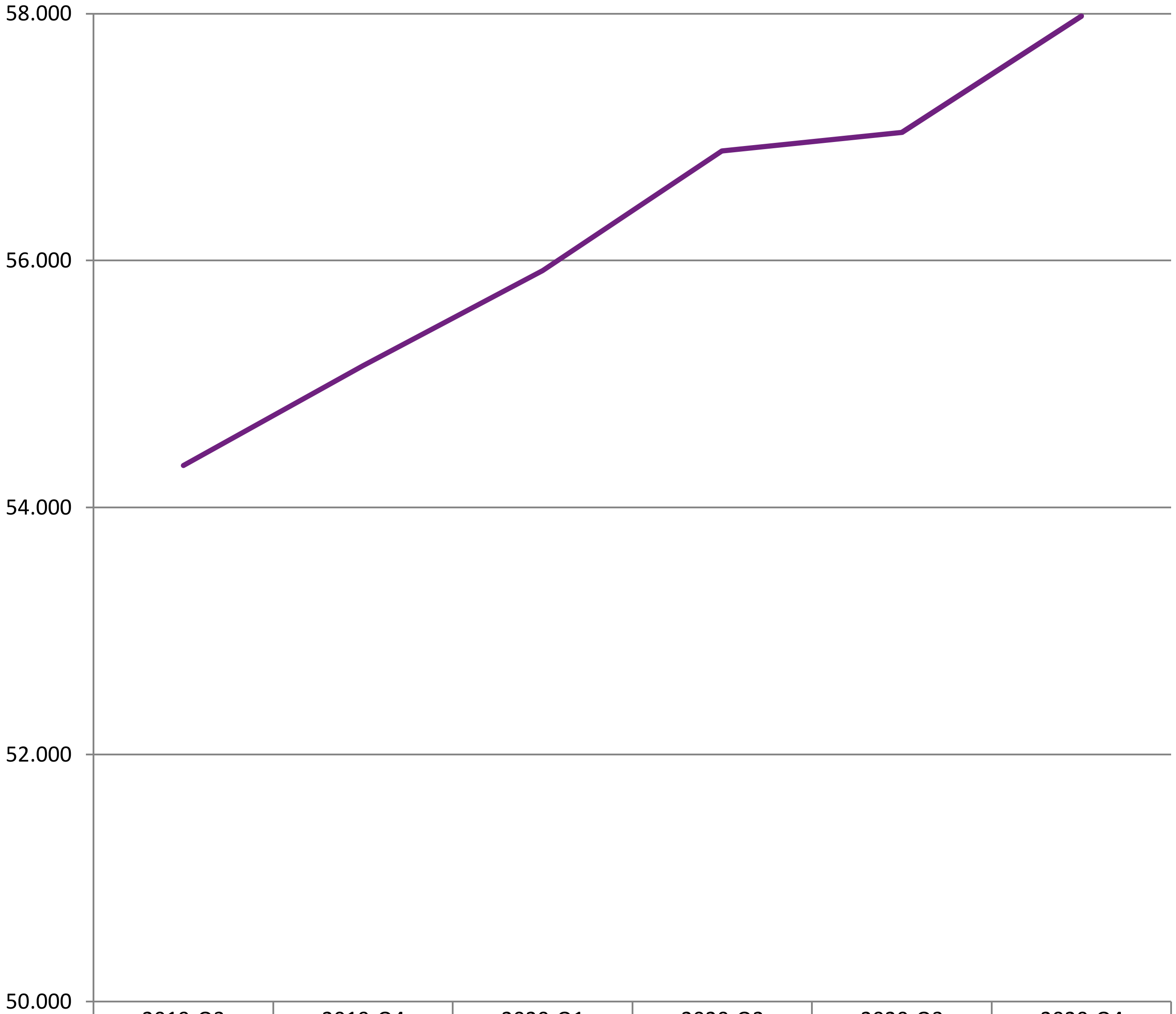


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Homes connected upgraded copper	4.337	4.399	4.525	4.468	4.503	4.547
Homes activated upgraded copper	1.526	1.586	1.614	1.585	1.586	1.884

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

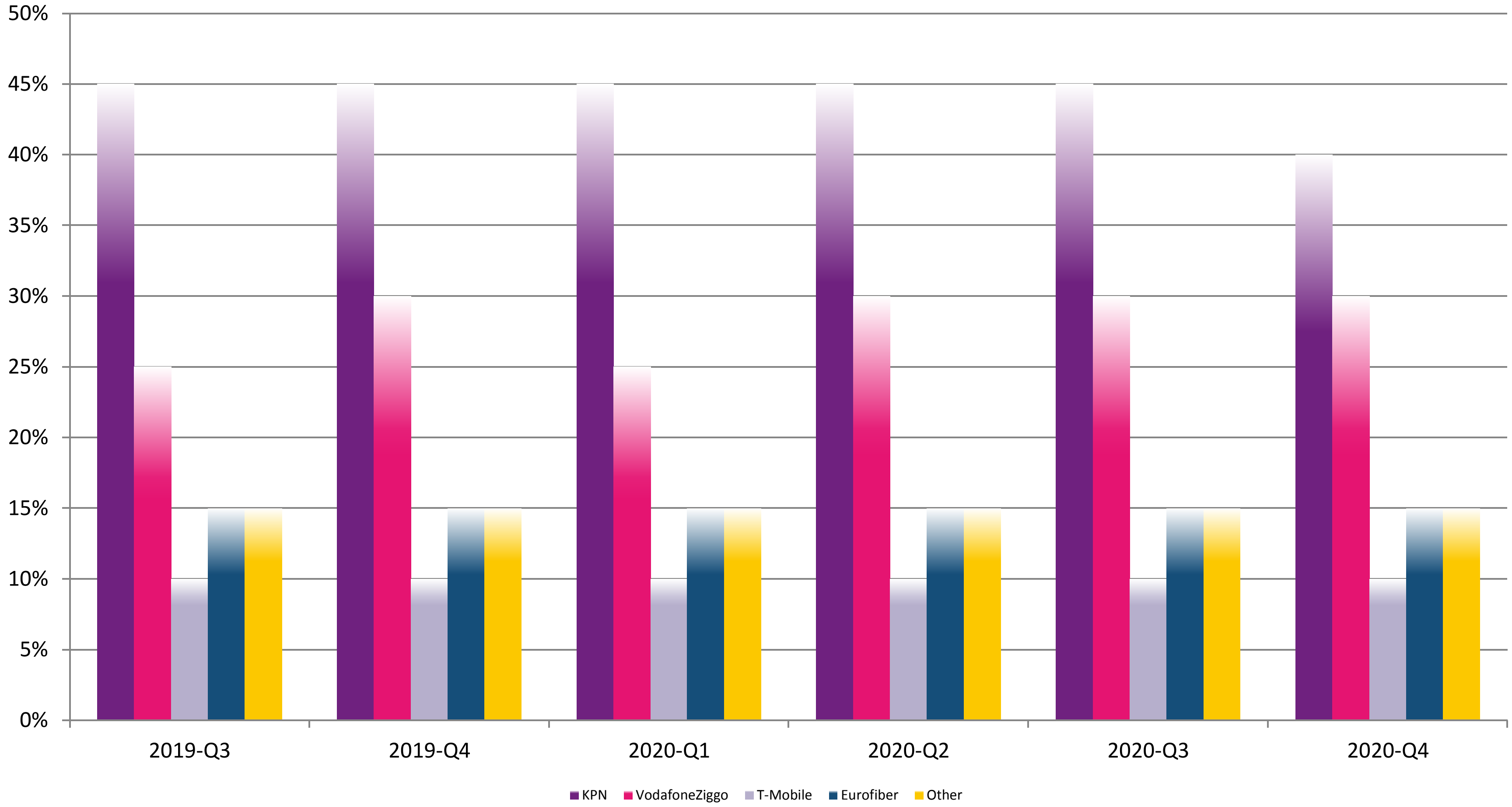


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Retail business active fiber connections	54.339	55.146	55.917	56.887	57.036	57.979

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

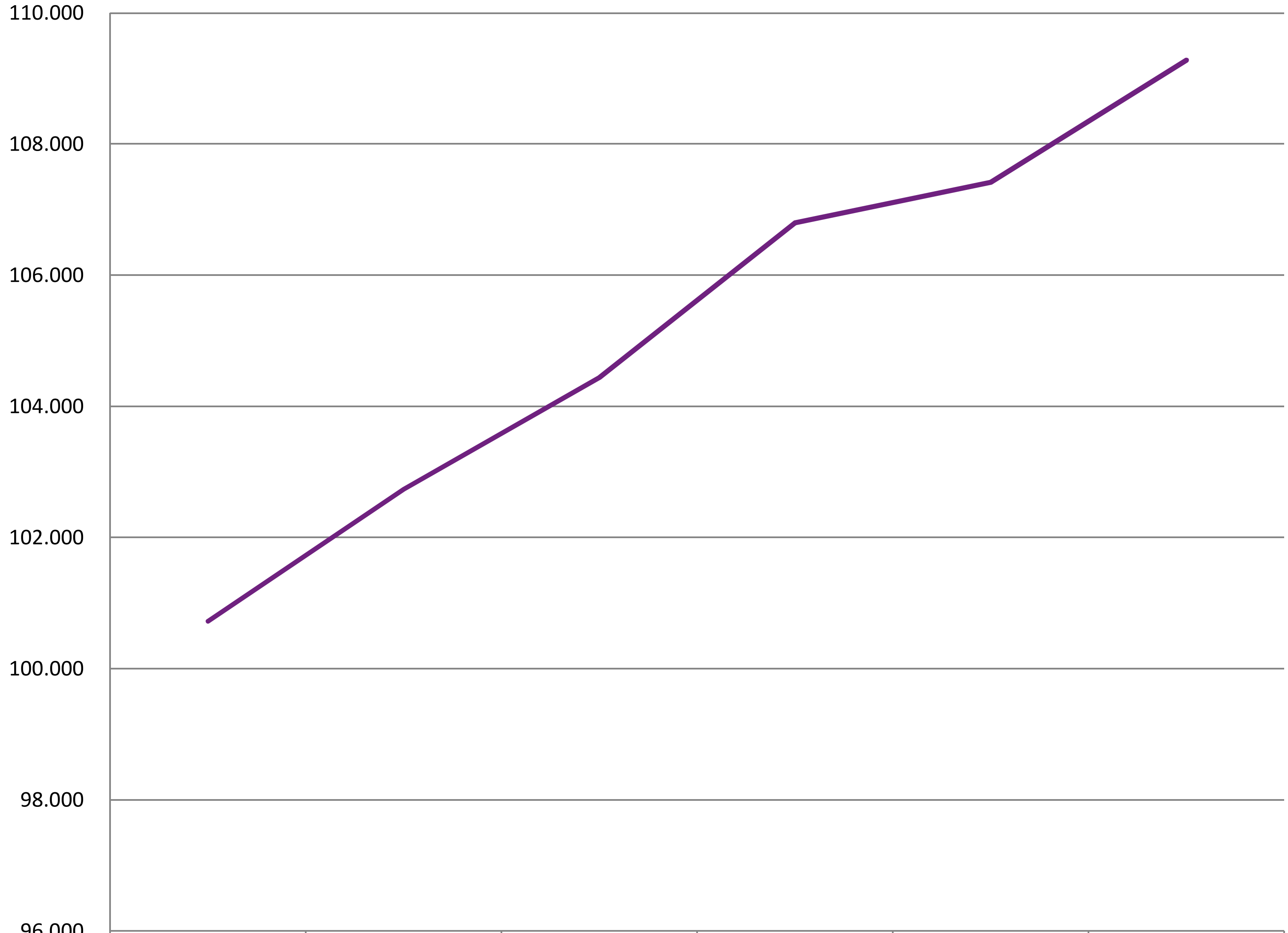


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
KPN	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[35 - 40%]
VodafoneZiggo	[20 - 25%]	[25 - 30%]	[20 - 25%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
Eurofiber	[10 - 15%]	[10 - 15%]	[10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

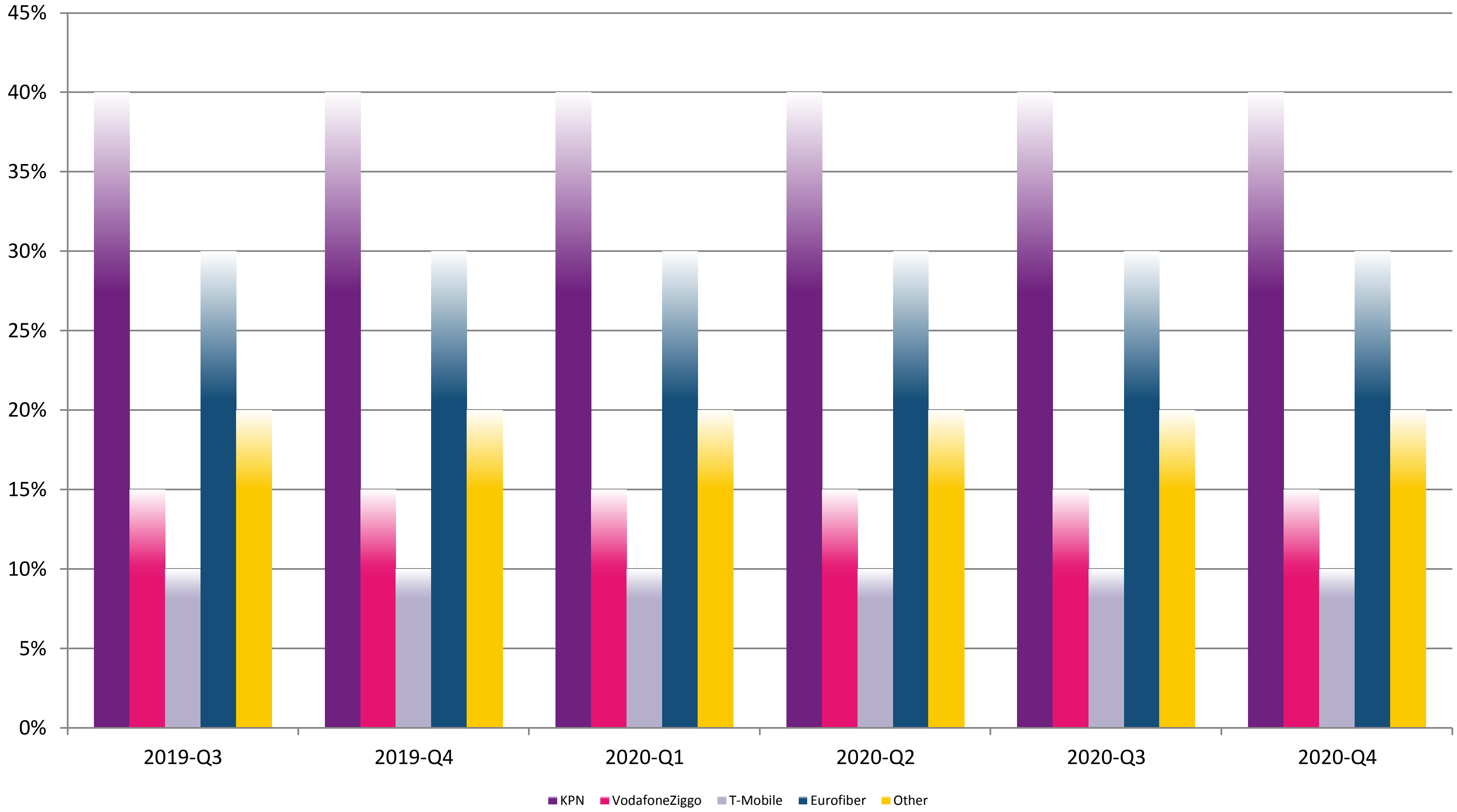


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
ODF (FttO) connections	100.723	102.738	104.441	106.799	107.416	109.280

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



Autoriteit Consument & Markt

	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
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 Telecommonitor. *Marktaandeel kleine en regionale marktpartijen zijn geschat op 10% (zie marktanalyse ODF-Access (FttO))

Business network services

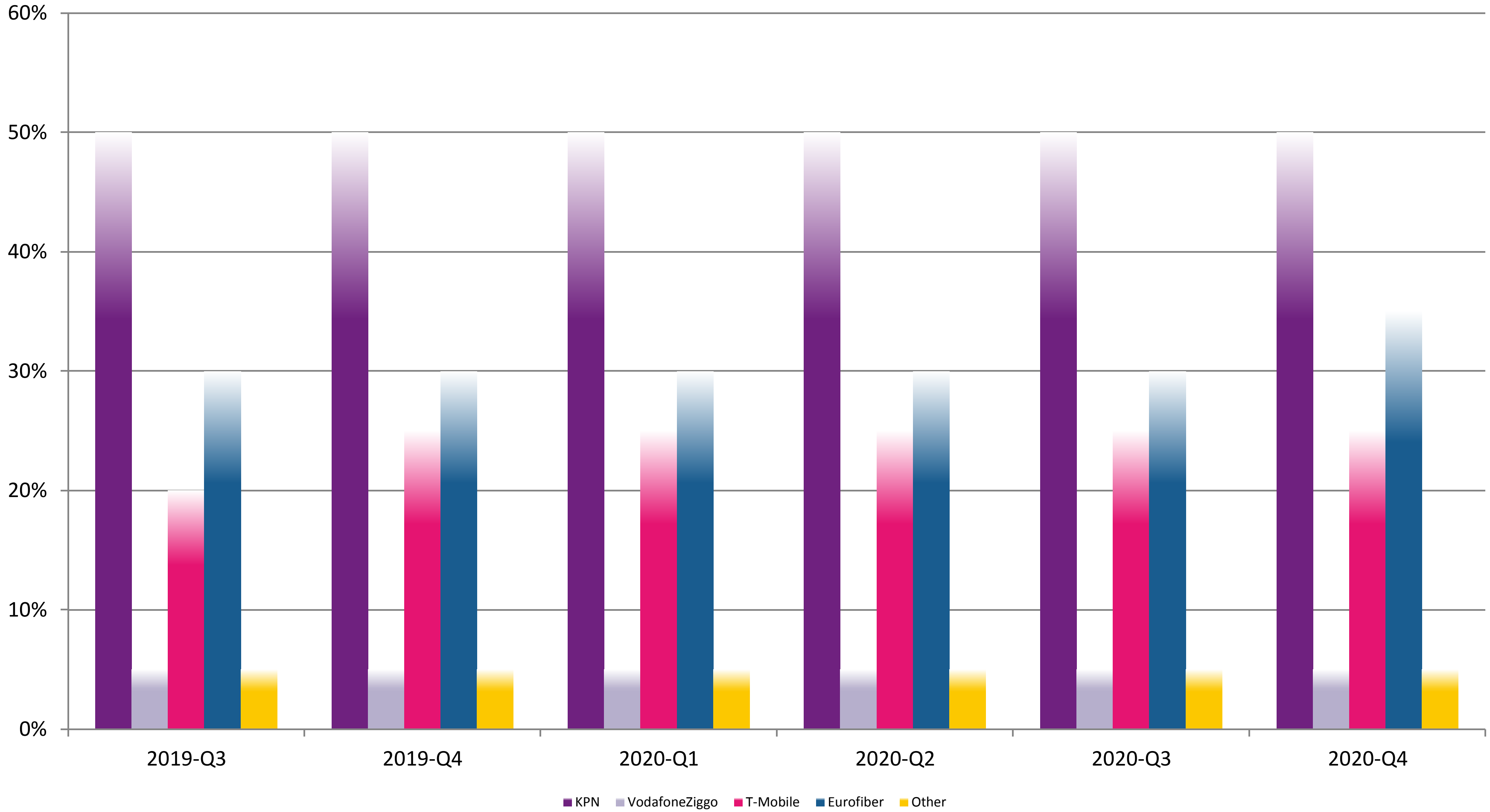
Wholesale HWT and leased lines

	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Connections for High quality wholesale access	112.209	109.947	109.058	109.916	107.205	107.277

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.

Business network services

Wholesale market share of HWT and leased lines



Autoriteit Consument & Markt

	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
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	[15 - 20%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]
Eurofiber	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[30 - 35%]
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.

Television

Retail subscriptions per connection type

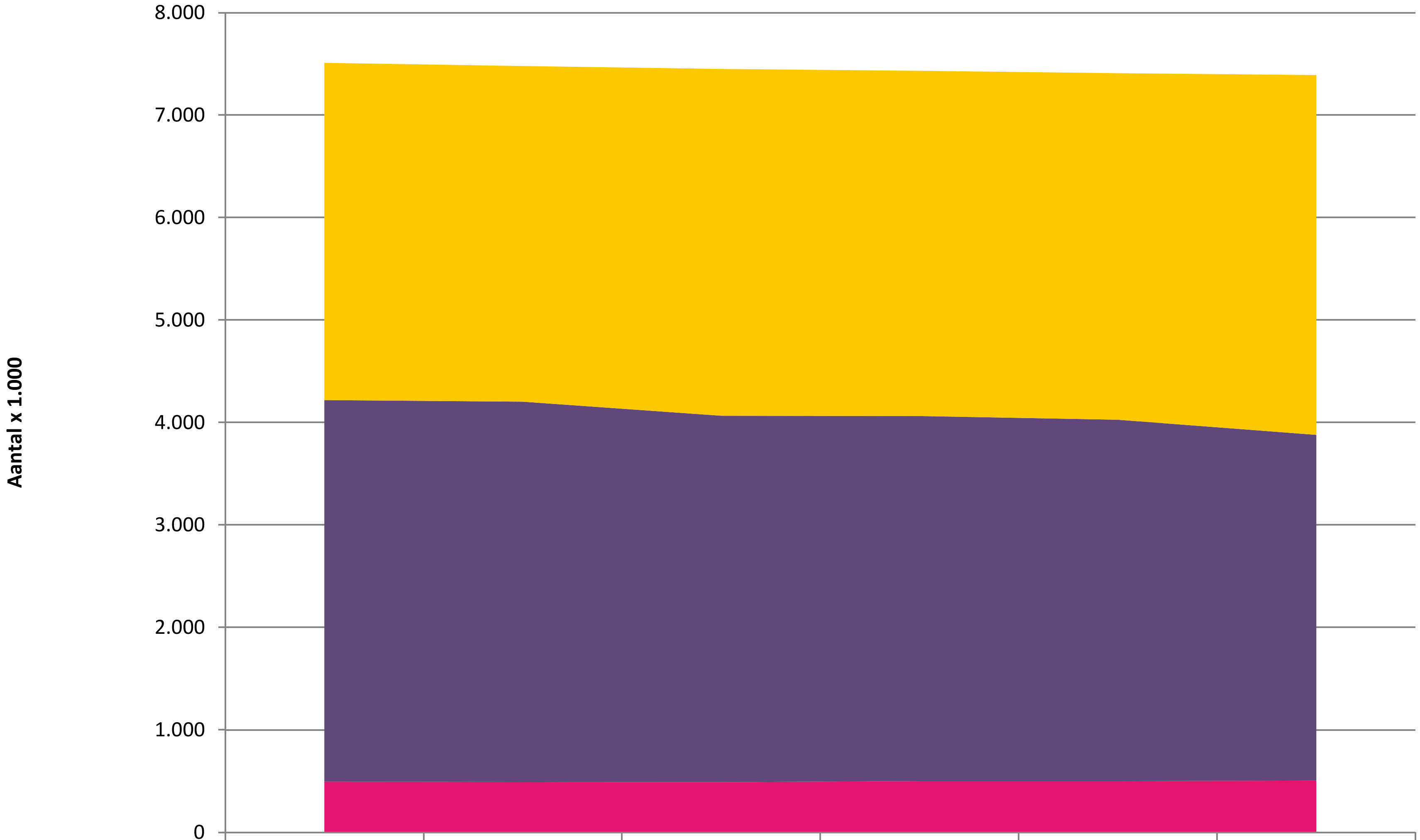
	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Digital platforms	2.236	2.199	2.155	2.114	2.075	2.055
Fiber	1.197	1.218	1.237	1.259	1.296	1.317
Cable	4.077	4.060	4.058	4.058	4.036	4.016

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, Digitenne en Satelliet.

Television

Digitalization of television subscriptions

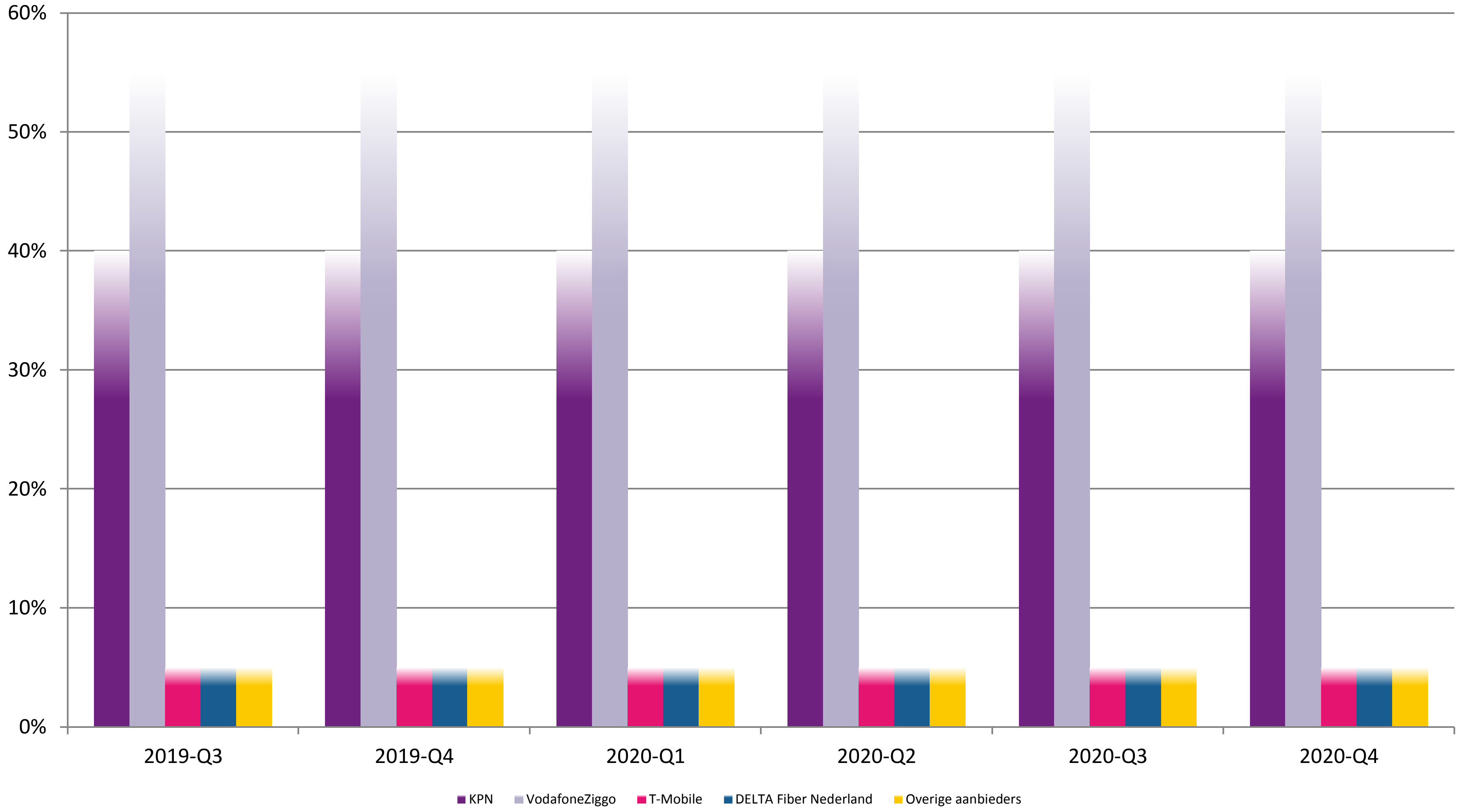


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Digital	3.291	3.276	3.386	3.369	3.380	3.512
Analogue and digital	3.724	3.711	3.577	3.562	3.527	3.372
Analogue	494	491	488	500	500	505

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



Autoriteit Consument & Markt

	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
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

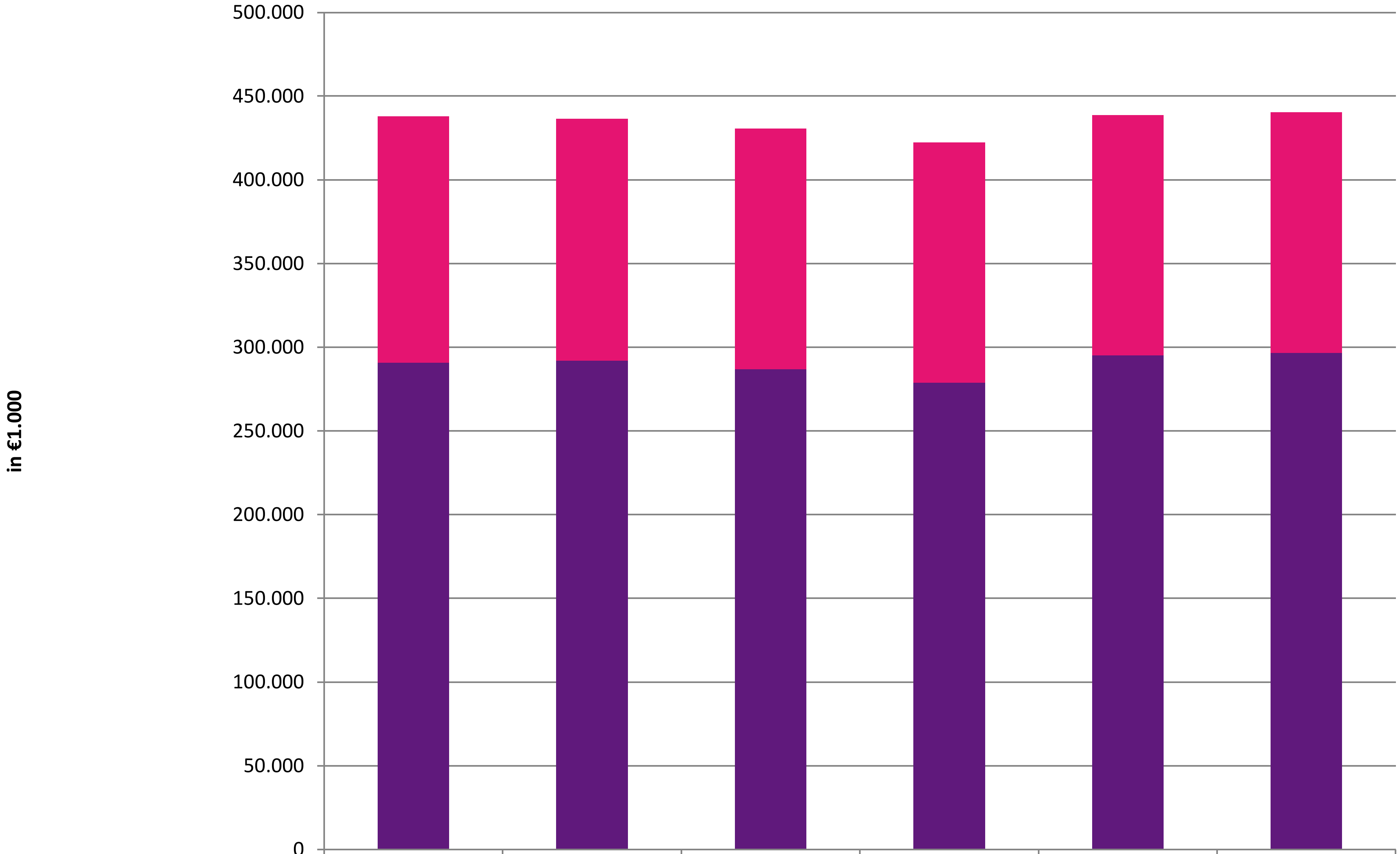
	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Adds	2,41%	2,28%	2,20%	2,22%	2,84%	6,72%
Disconnects	2,72%	2,48%	2,55%	2,36%	3,15%	7,04%

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

Autoriteit Consument & Markt

Television

Retail turnover of radio/tv subscriptions

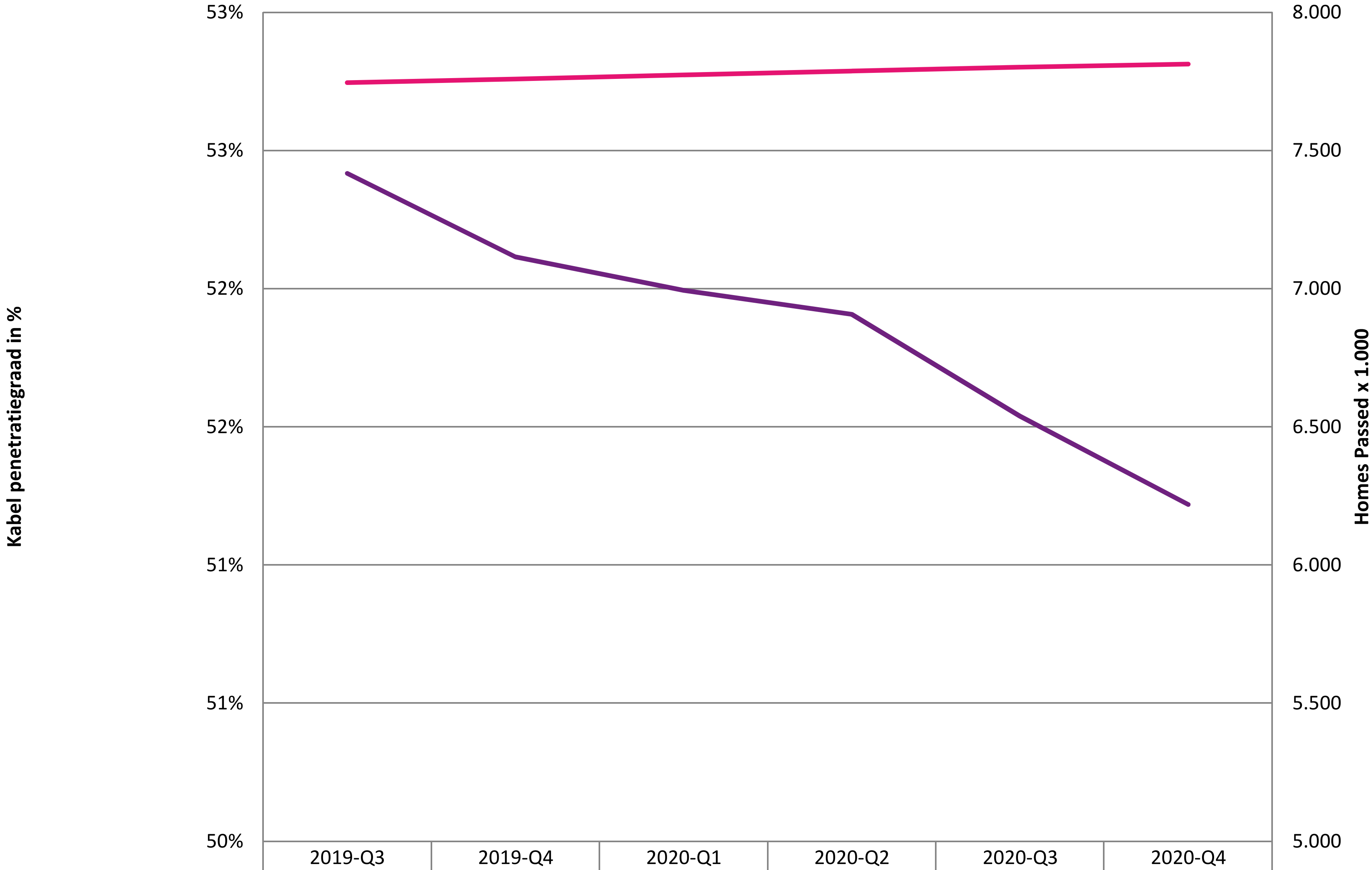


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Non-cable providers aggregated	€ 147.018	€ 144.299	€ 143.721	€ 143.319	€ 143.451	€ 143.548
Cable providers aggregated	€ 290.883	€ 292.055	€ 286.844	€ 278.893	€ 295.069	€ 296.560

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

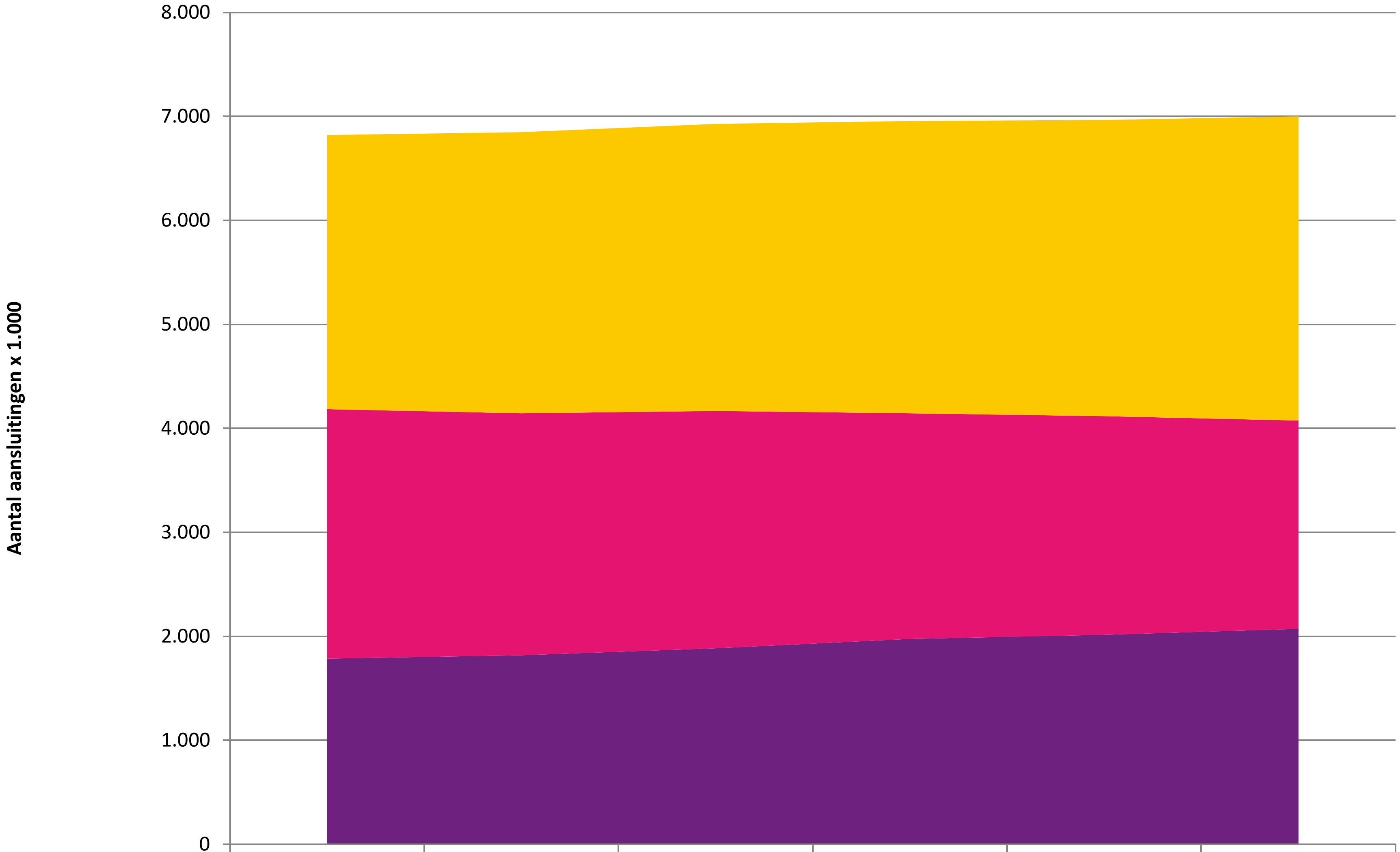


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Penetration rate cable	52%	52%	52%	52%	52%	51%
Homes passed cable	7.745	7.758	7.773	7.787	7.801	7.812

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



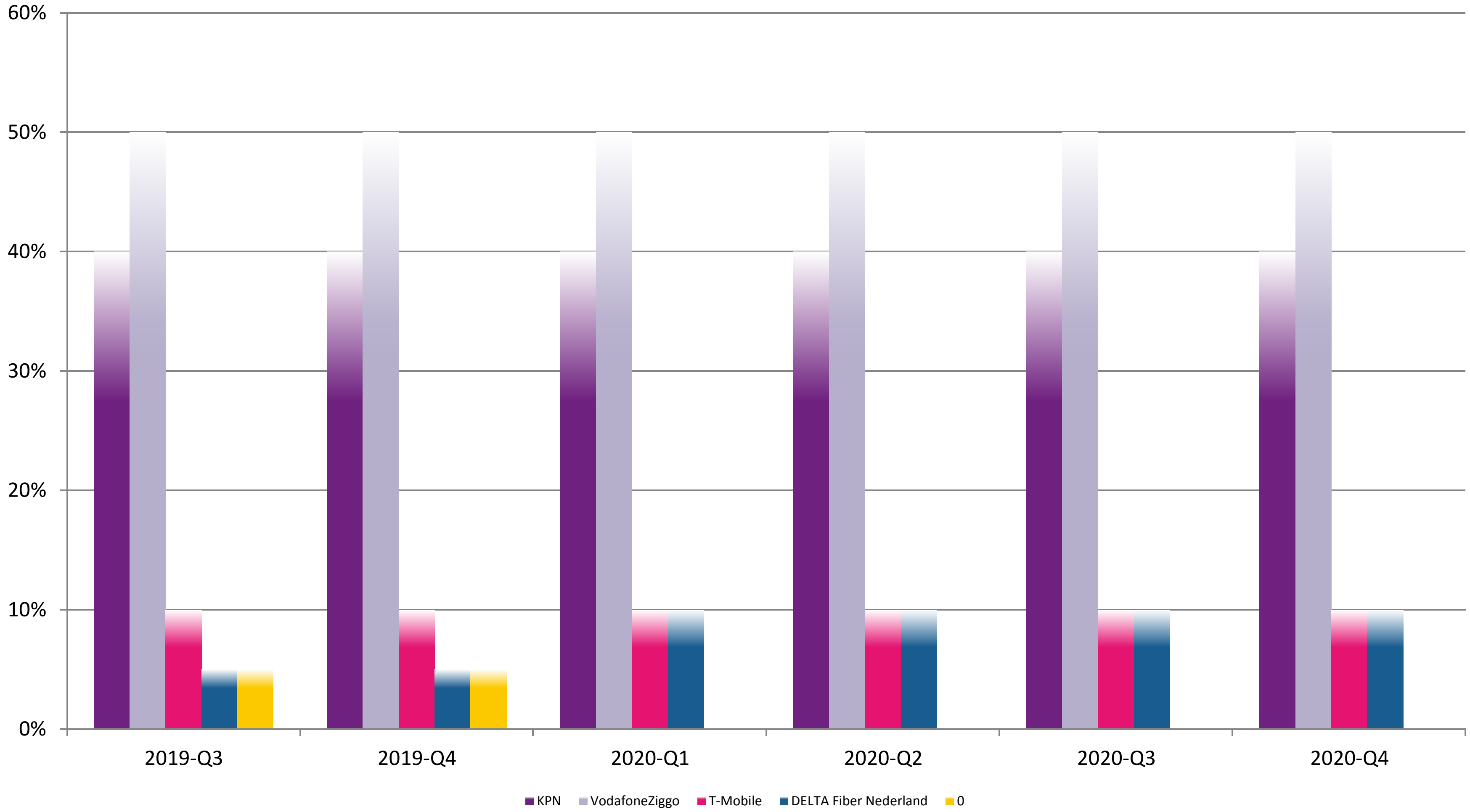
	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Fixed-Mobile Bundles	2.636	2.702	2.760	2.810	2.848	2.924
Triple play	2.398	2.327	2.280	2.171	2.101	2.003
Dual play	1.785	1.817	1.885	1.974	2.015	2.072

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-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
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%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
Other	[0 - 5%]	[0 - 5%]	[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-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
KPN	[50 - 55%]	[50 - 55%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
VodafoneZiggo	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
T-Mobile	[0 - 5%]	[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

Autoriteit Consument & Markt

	1	2	3	4	5	6
Broadband in Fixed-Mobile	25%	25%	25%	25%	26%	26%
Broadband in triple play	42%	41%	41%	40%	39%	38%
Broadband in dual play	25%	25%	26%	27%	28%	28%
Broadband only	8%	8%	7%	7%	7%	7%
Breedband in vast-mobiel	35%	36%	37%	38%	38%	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

	1	2	3	4	5	6
TV in Fixed-Mobile	24%	24%	24%	25%	25%	26%
TV in triple play	39%	39%	39%	38%	37%	37%
TV in dual play	18%	19%	20%	22%	22%	23%
TV only	19%	18%	16%	16%	15%	14%
TV in vast-mobiel	51%	52%	53%	55%	56%	58%

Autoriteit Consument & Markt

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

	1	2	3	4	5	6
Fixed telephony in Fixed-Mobile	33%	34%	34%	36%	37%	37%
Fixed telephony in triple play	44%	44%	43%	43%	42%	40%
Fixed telephony in dual play	7%	6%	6%	6%	6%	6%
Fixed telephony only	17%	16%	16%	15%	15%	17%
Vaste telefonie in vast-mobiel	42%	43%	44%	46%	47%	48%

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	*GlaswebVenray*	CanalDigitaal	CanalDigitaal
BT	*Kabelnoord*	Delta Fiber Nederland	Delta Fiber Nederland
CanalDigitaal	*KT Waalre*	KPN	KPN
Colt	*Lomboxnet*	T-Mobile (incl. Tele2)	T-Mobile (incl. Tele2)
Delta Fiber Ned.	*Midden-Brab. Glas*	VodafoneZiggo	VodafoneZiggo
Eurofiber	*Primevest*		
KPN	*Rekam*		
T-Mobile/Tele2	*SKP*		
Verizon	*SKV*		
VodafoneZiggo			
CAI Hardewijk			
Delta Rijssen			
E-Fiber			
FiberFlevo			
FiberNH			
Glasdraad			

Autoriteit Consument & Markt

Glossary (Dutch)

Autoriteit Consument & Markt

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
MVNO	Mobile Virtual Network Operator
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.
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