

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.

### 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)



# Annual figures

## Fixed network related revenues

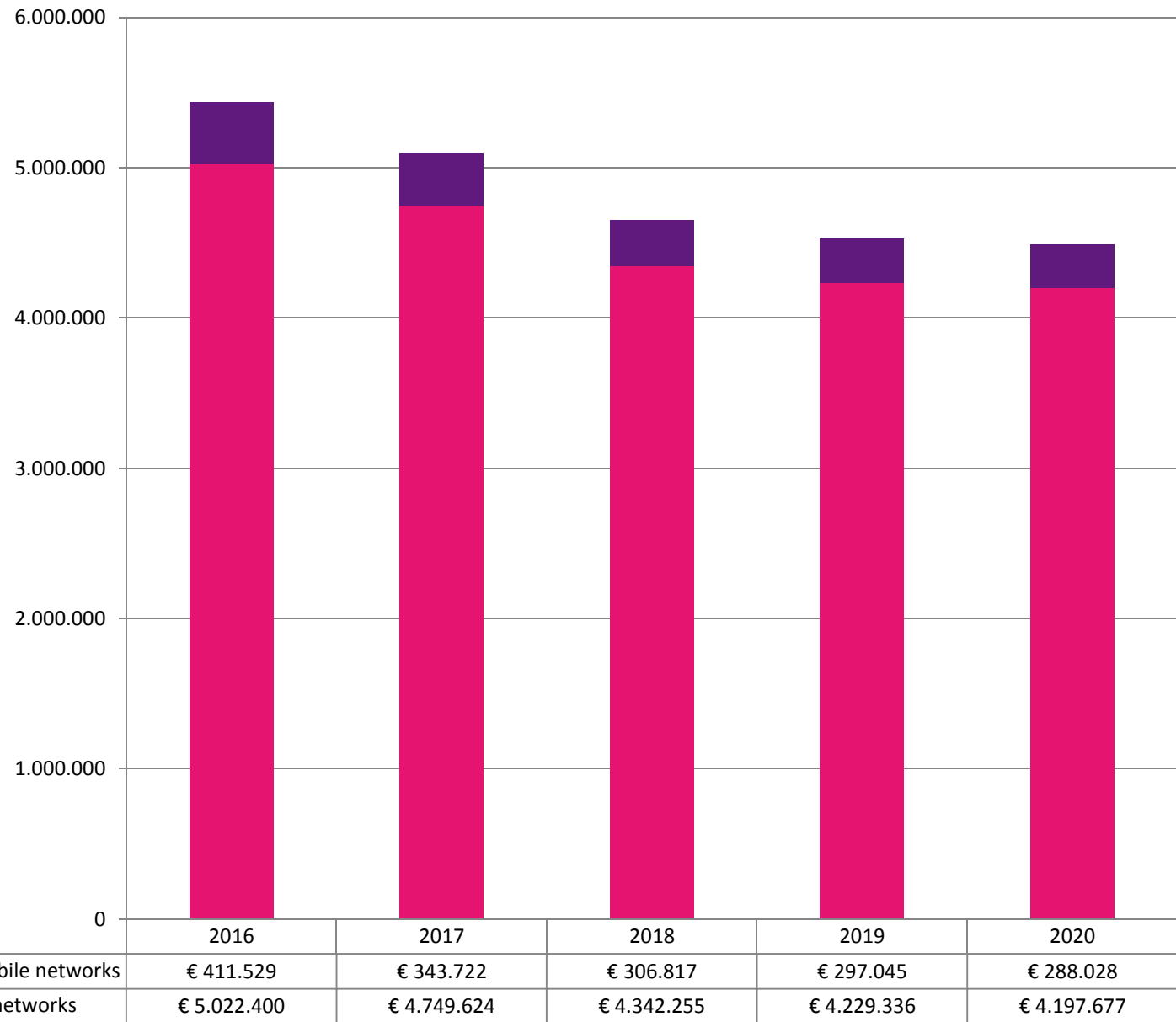


# Annual figures

## Mobile network related revenues



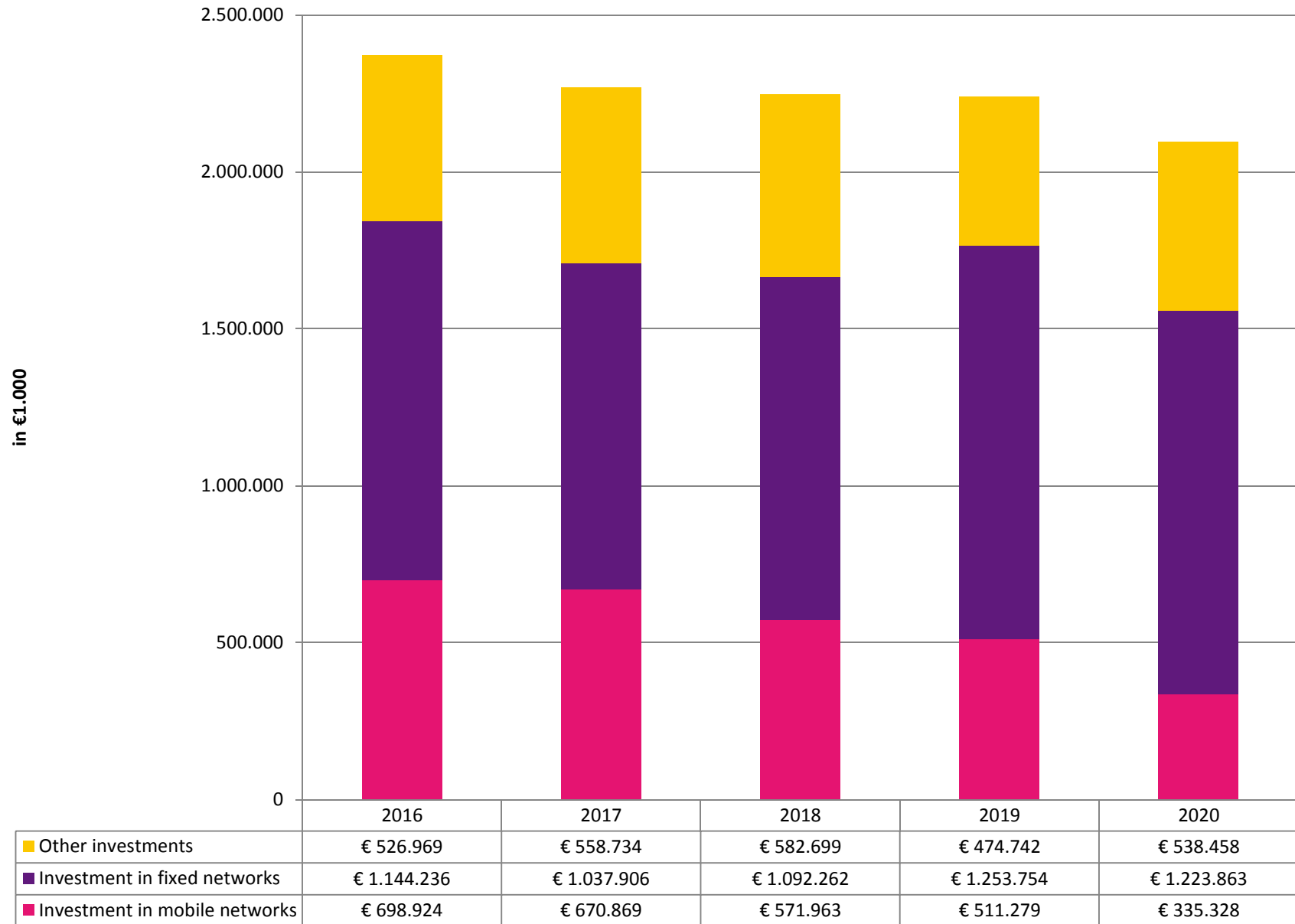
in €1.000



Op basis van vragen 0\_A1\_1\_1-2-3 en 0\_A1\_2\_1-2-3 van de Telecommonitor

# Annual figures

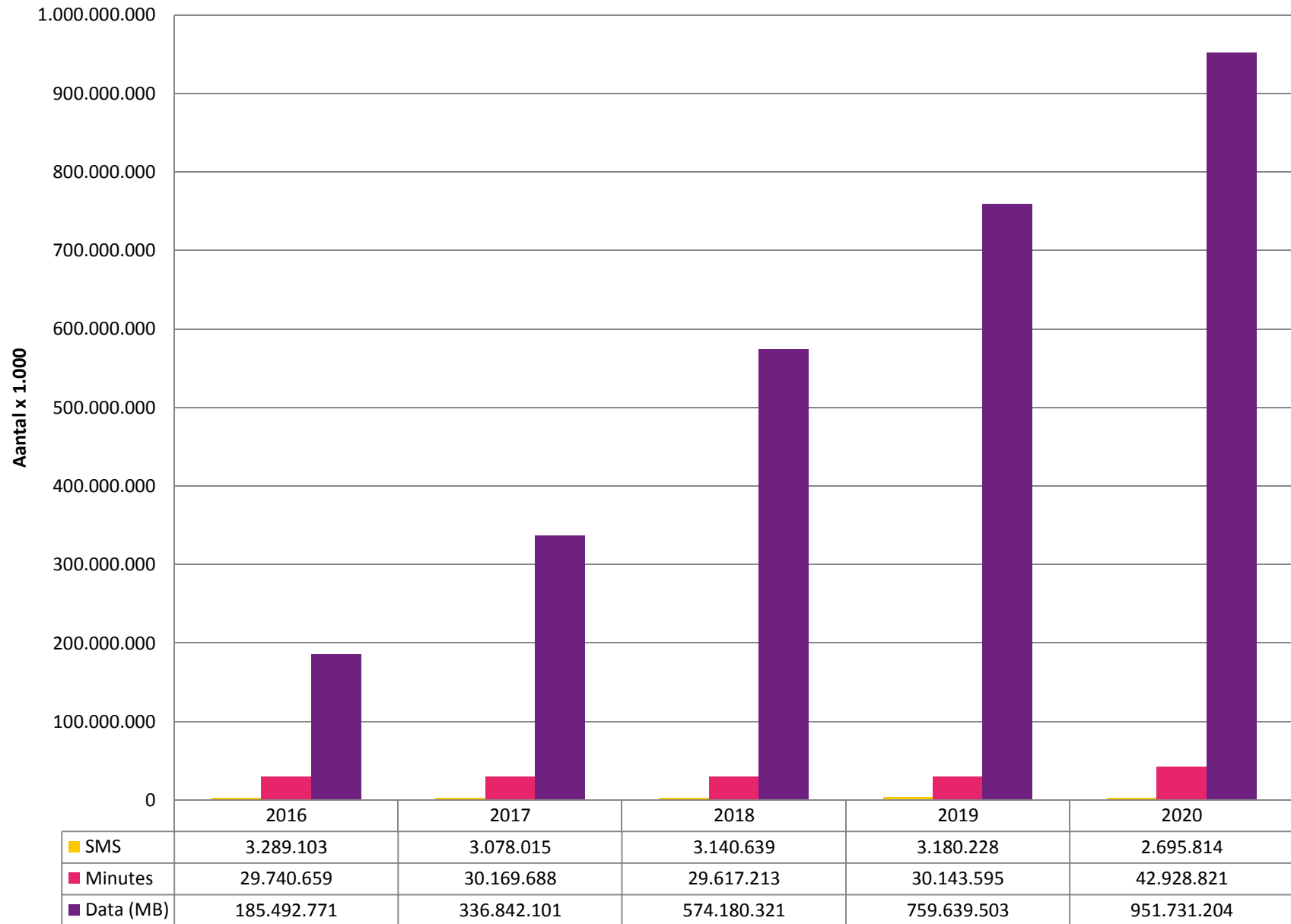
## Mobile and fixed network investments



Op basis van vragen 0\_A2\_1\_1-2-3 van de Telecommonitor

# Annual figures

## 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



# Annual figures

## Retail connections by speed

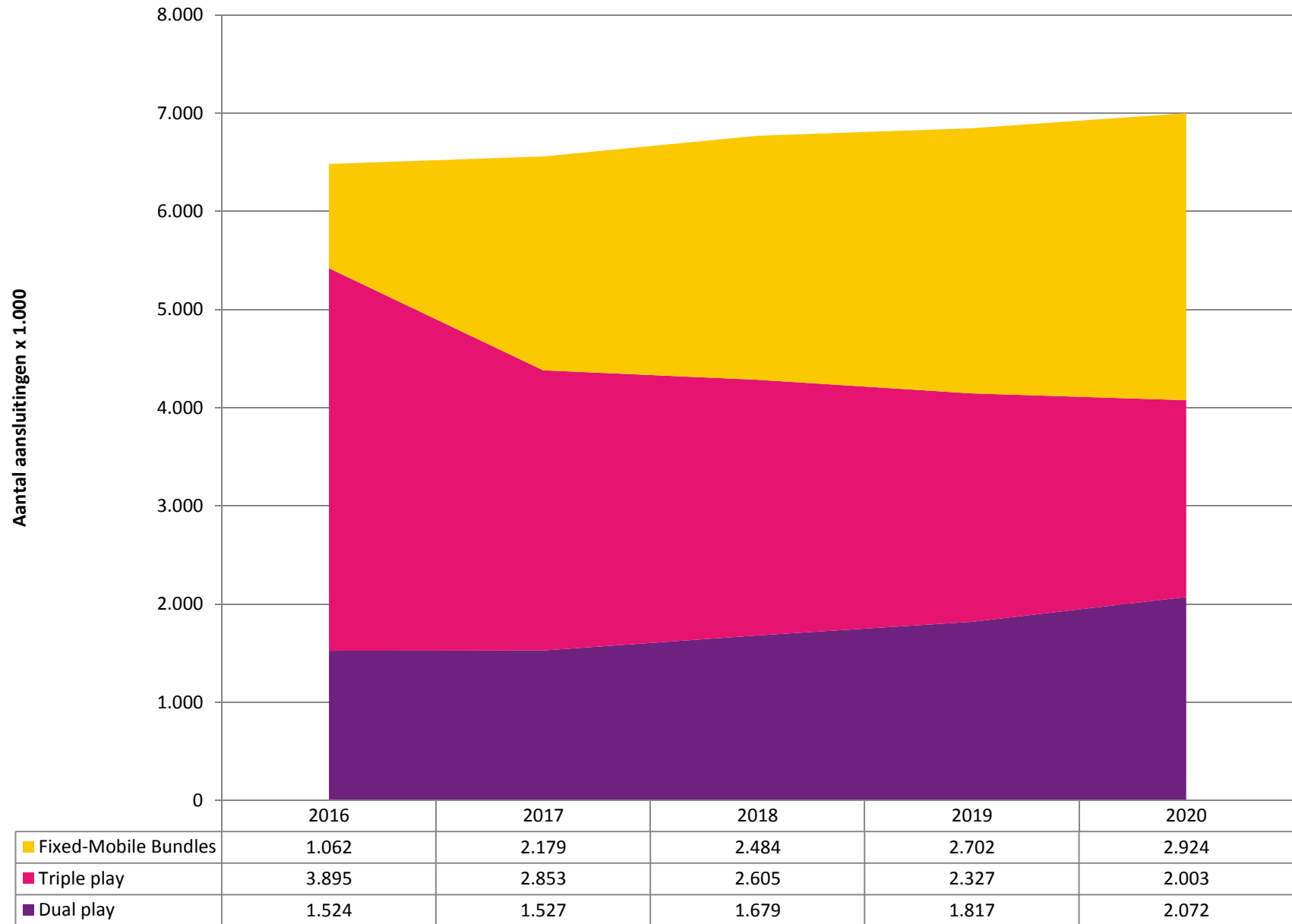


	2016	2017	2018	2019	2020
■ ≥ 100 Mbps	32,8%	41,4%	43,9%	45,7%	48,8%
■ ≥ 30 Mbps, < 100 Mbps	40,9%	45,3%	46,2%	46,0%	43,7%
■ ≥ 10 Mbps, < 30 Mbps	24,4%	11,8%	8,9%	7,7%	6,6%
■ < 10 Mbps	1,8%	1,5%	1,0%	0,6%	1,0%

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

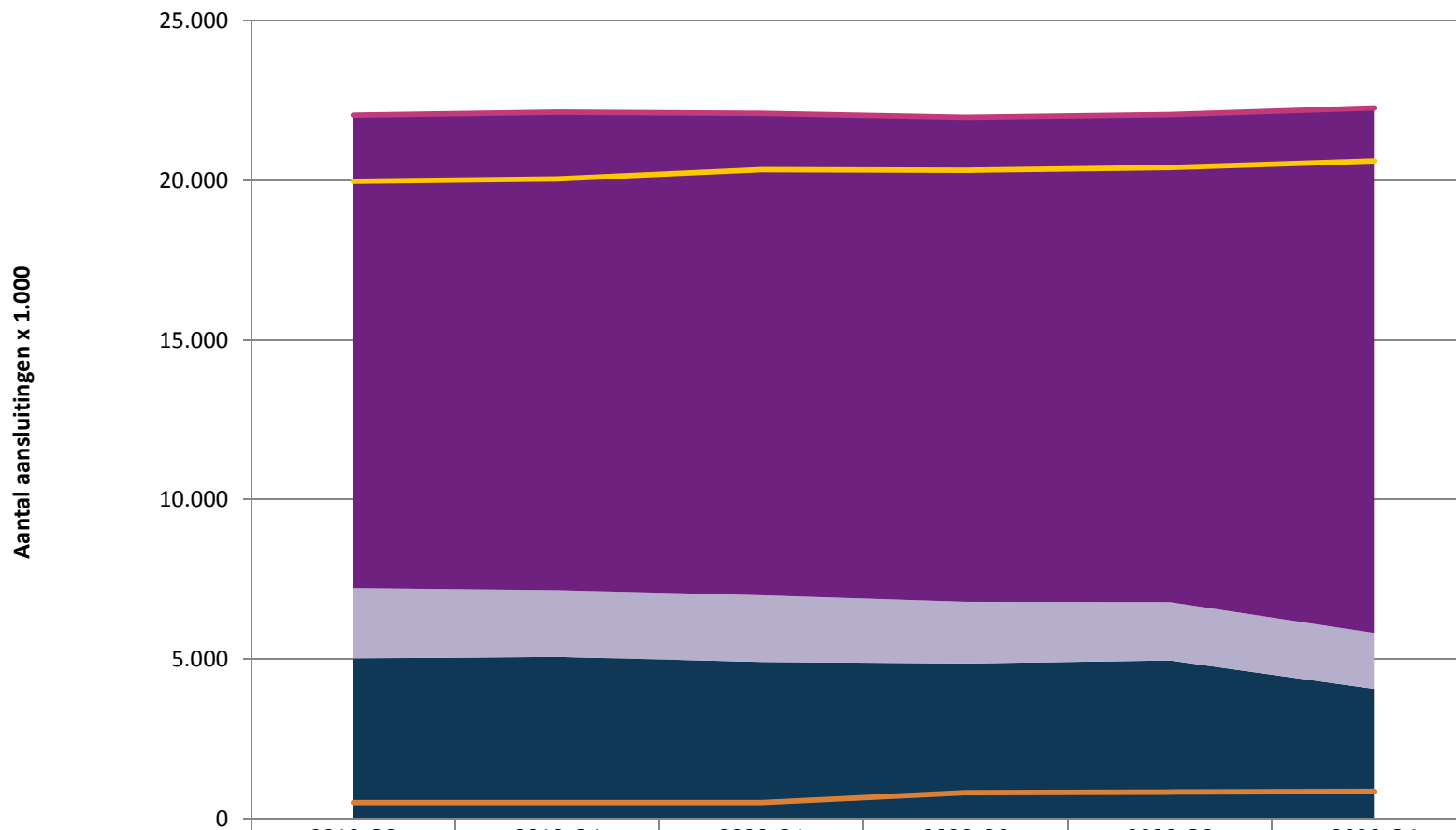
## Bundles of telecommunication services



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



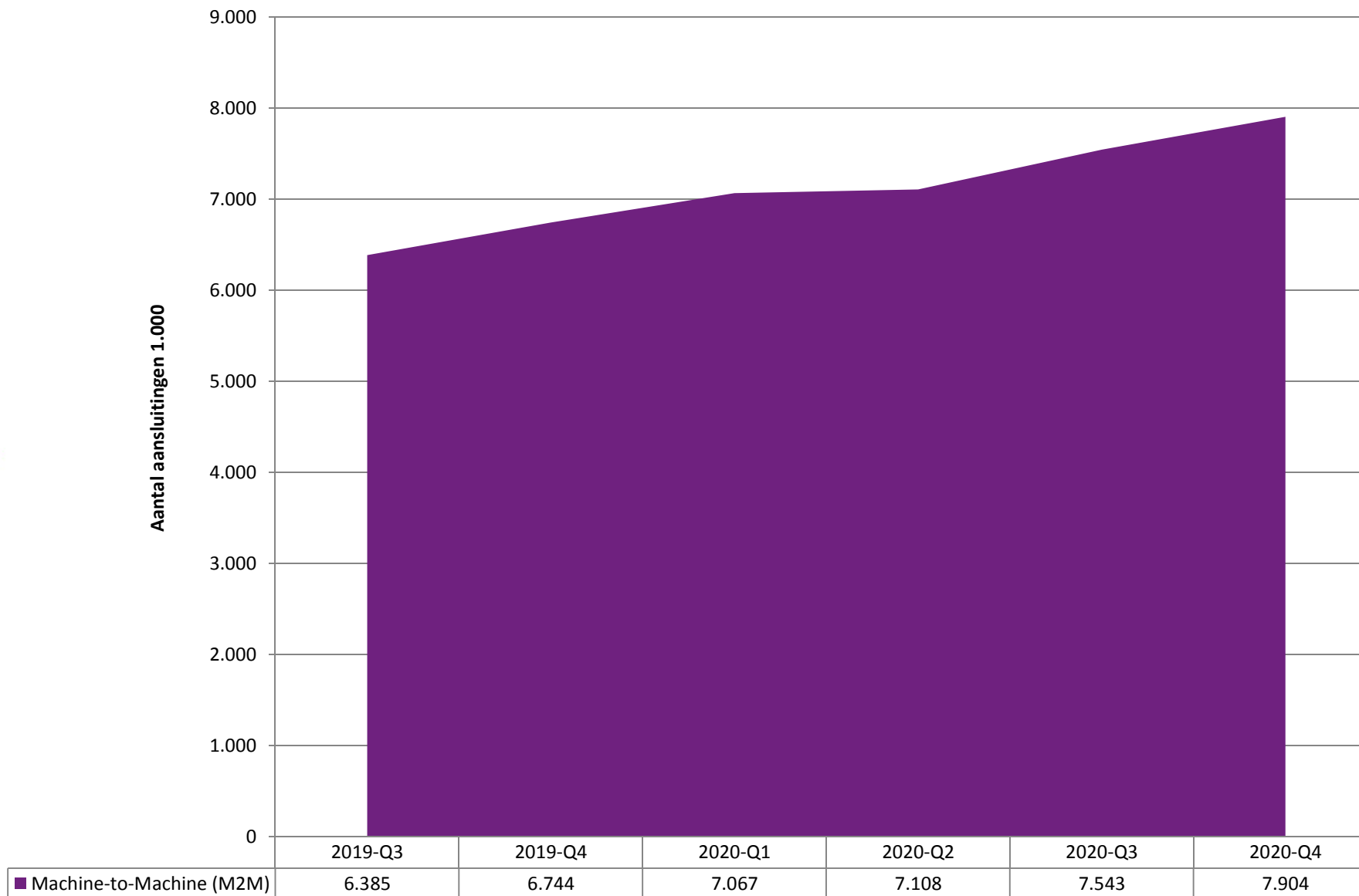
	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
Postpaid MNO	14.818	14.975	15.097	15.186	15.273	16.450
Prepaid MNO	2.205	2.093	2.095	1.932	1.825	1.756
Postpaid and prepaid MVNO	5.022	5.070	4.910	4.862	4.962	4.065
Total mobile connections	22.045	22.138	22.102	21.979	22.059	22.270
Of which bundled (data 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

\* 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

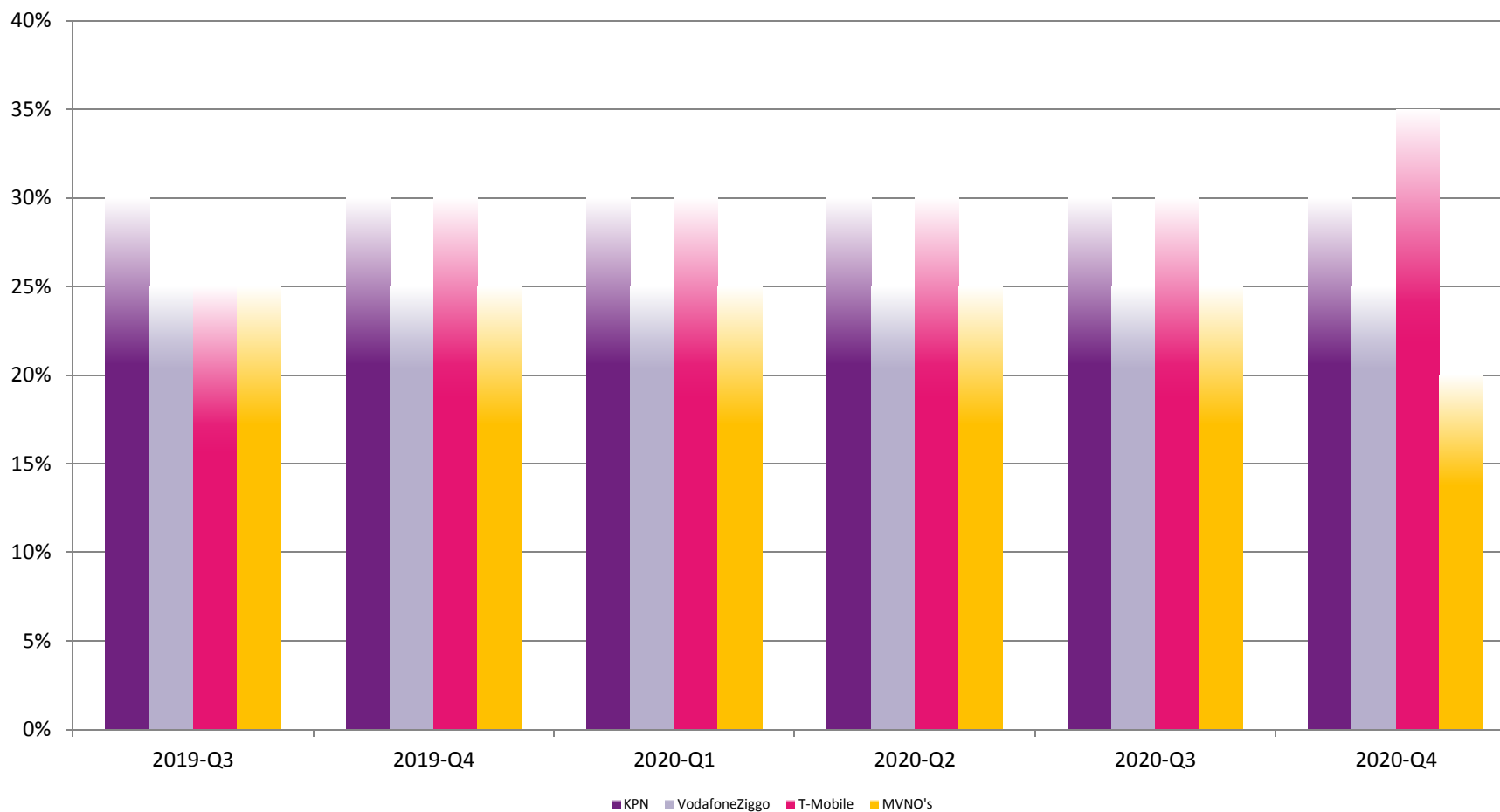
## Machine-to-Machine connections



Op basis van vragen 10\_A1\_4\_1 van de Telecommonitor

# Mobile

## Retail market share based on connections

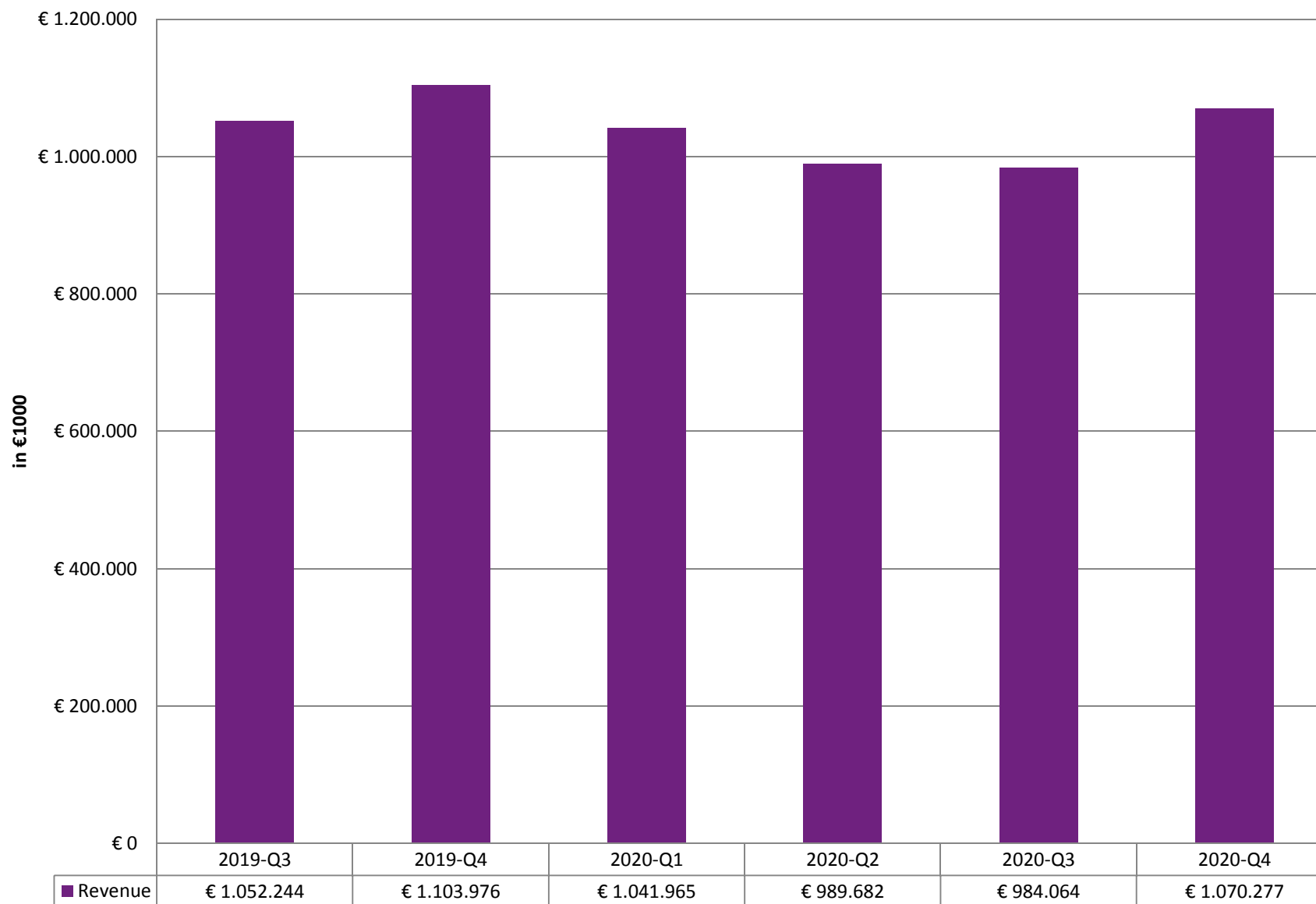


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
KPN	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
VodafoneZiggo	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]
T-Mobile	[20 - 25%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[30 - 35%]
MVNO's	[20 - 25%]	[20 - 25%]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

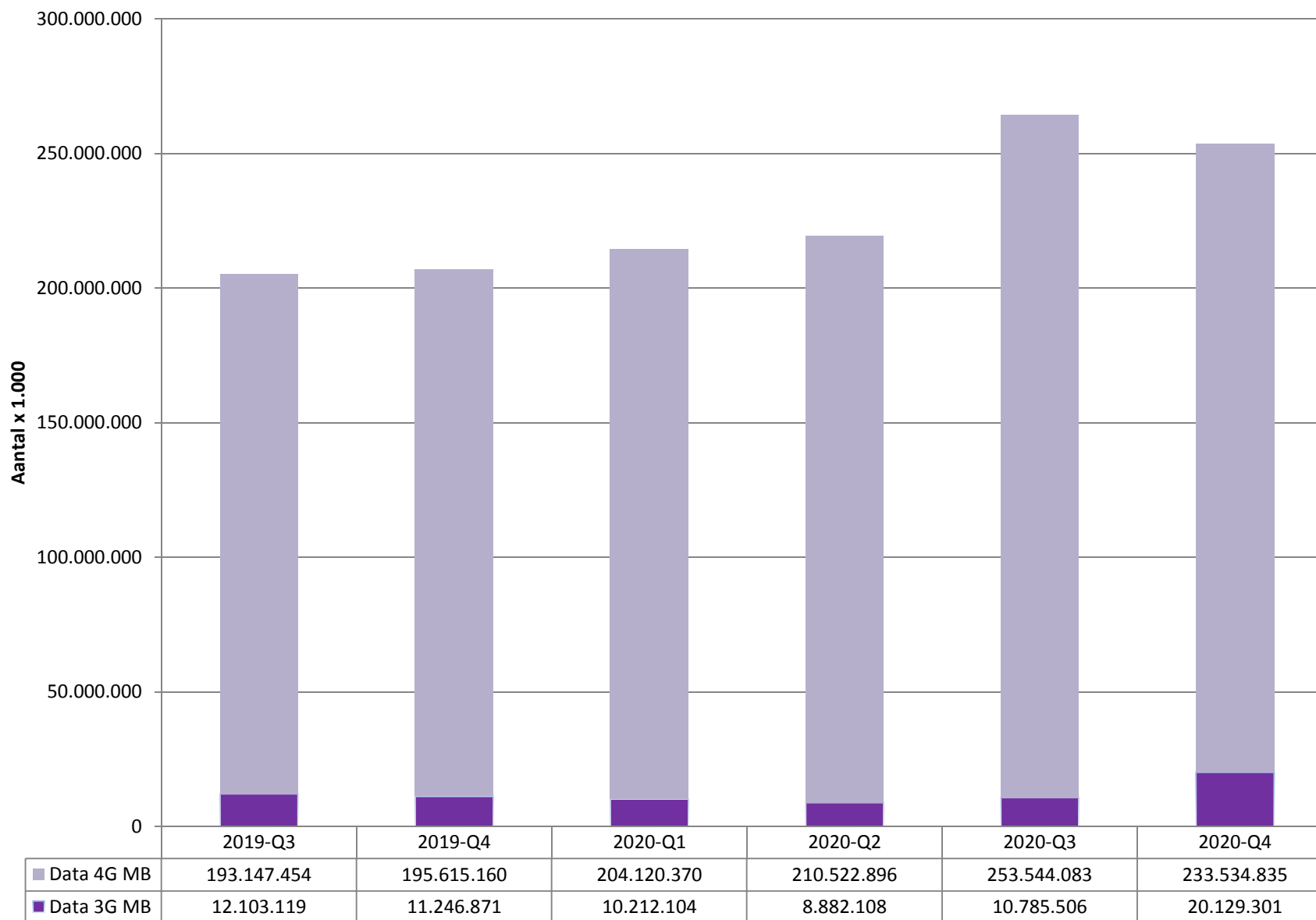
## Retail revenue of Mobile Network Operators (MNOs)



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

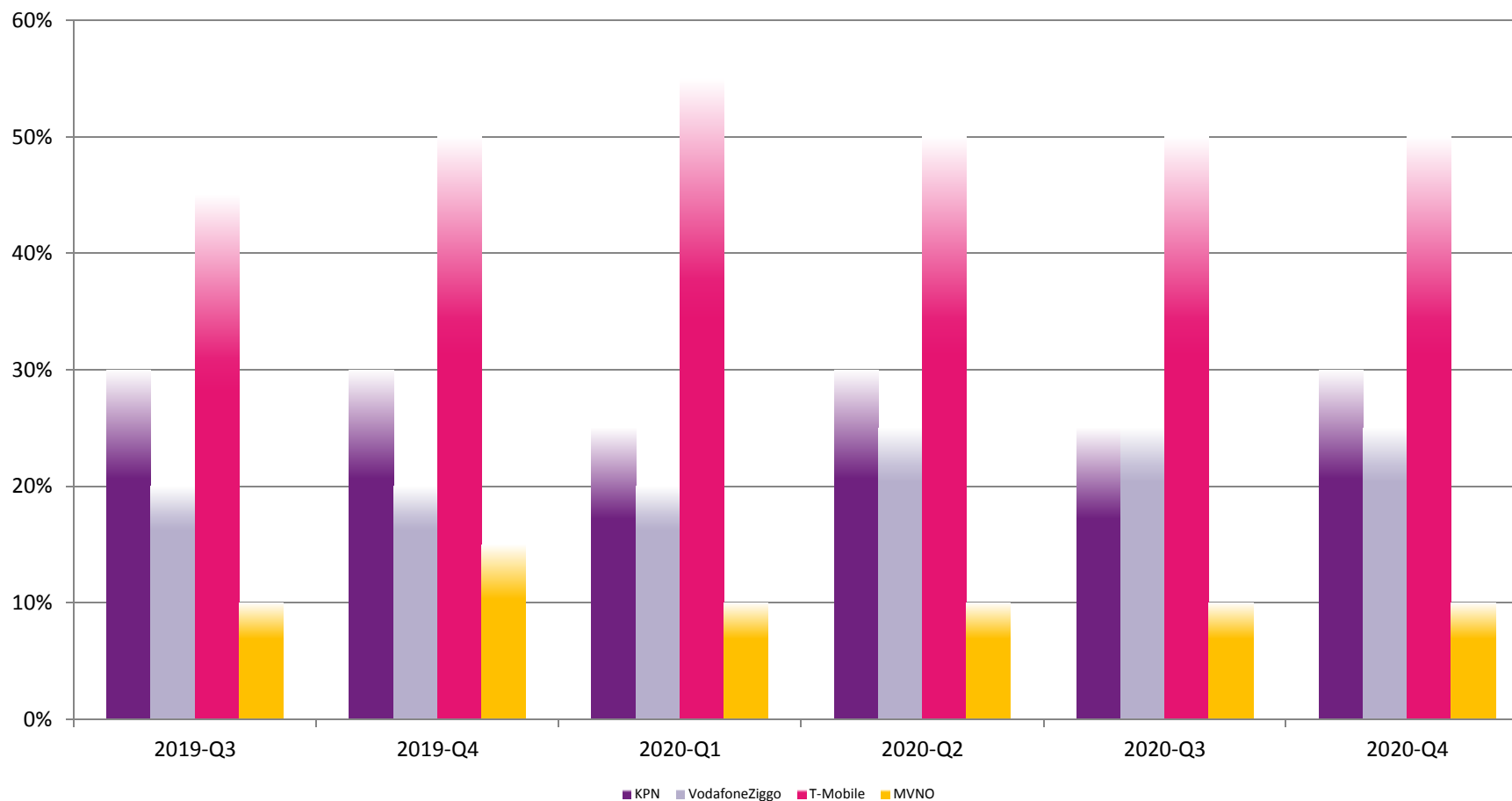
## Retail volume 3G/4G data



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%]

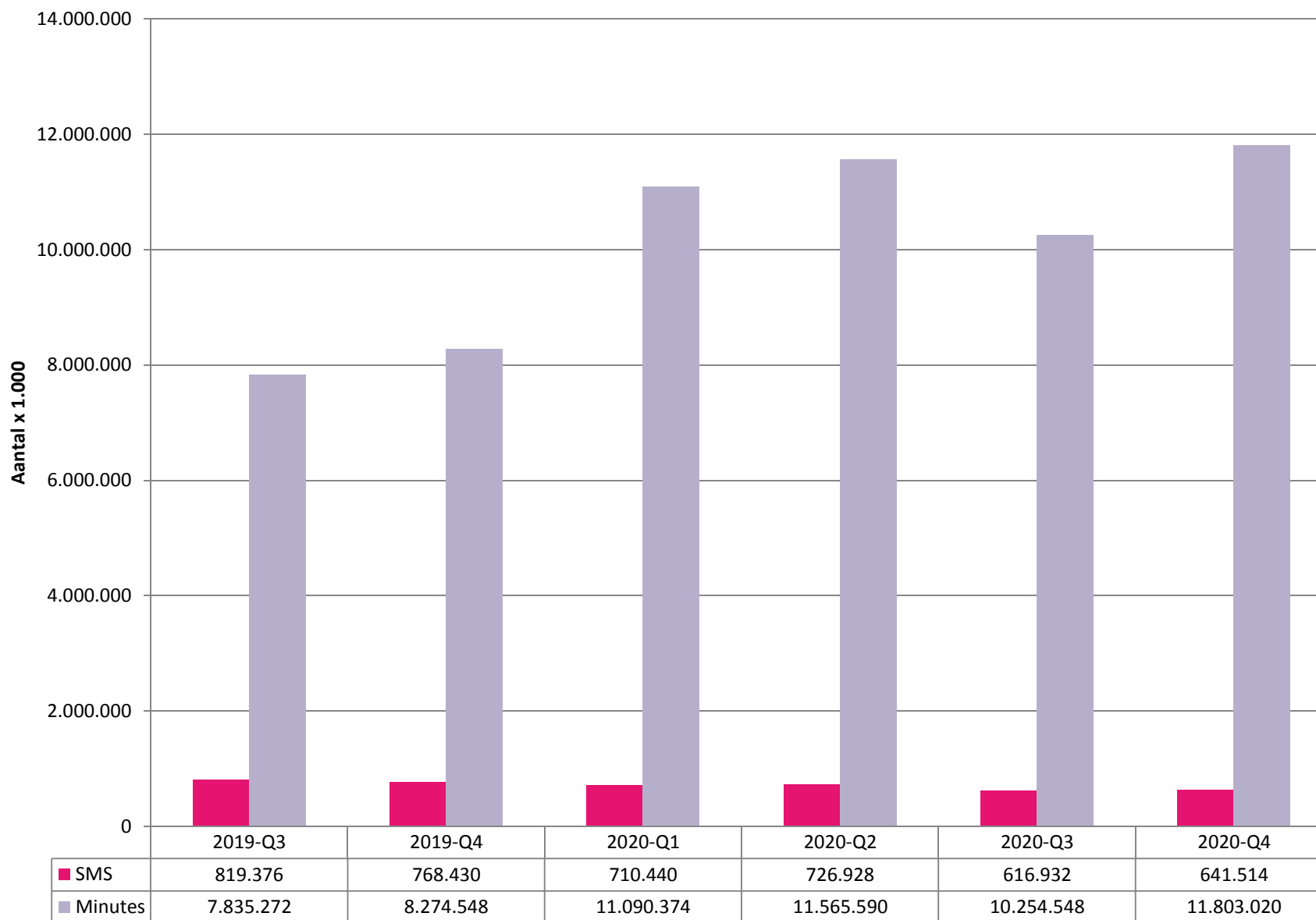
\* De overname van Simpel door T-Mobile is niet verwerkt in de marktaandeelen voor mobiele dataverbruik

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



# Mobile

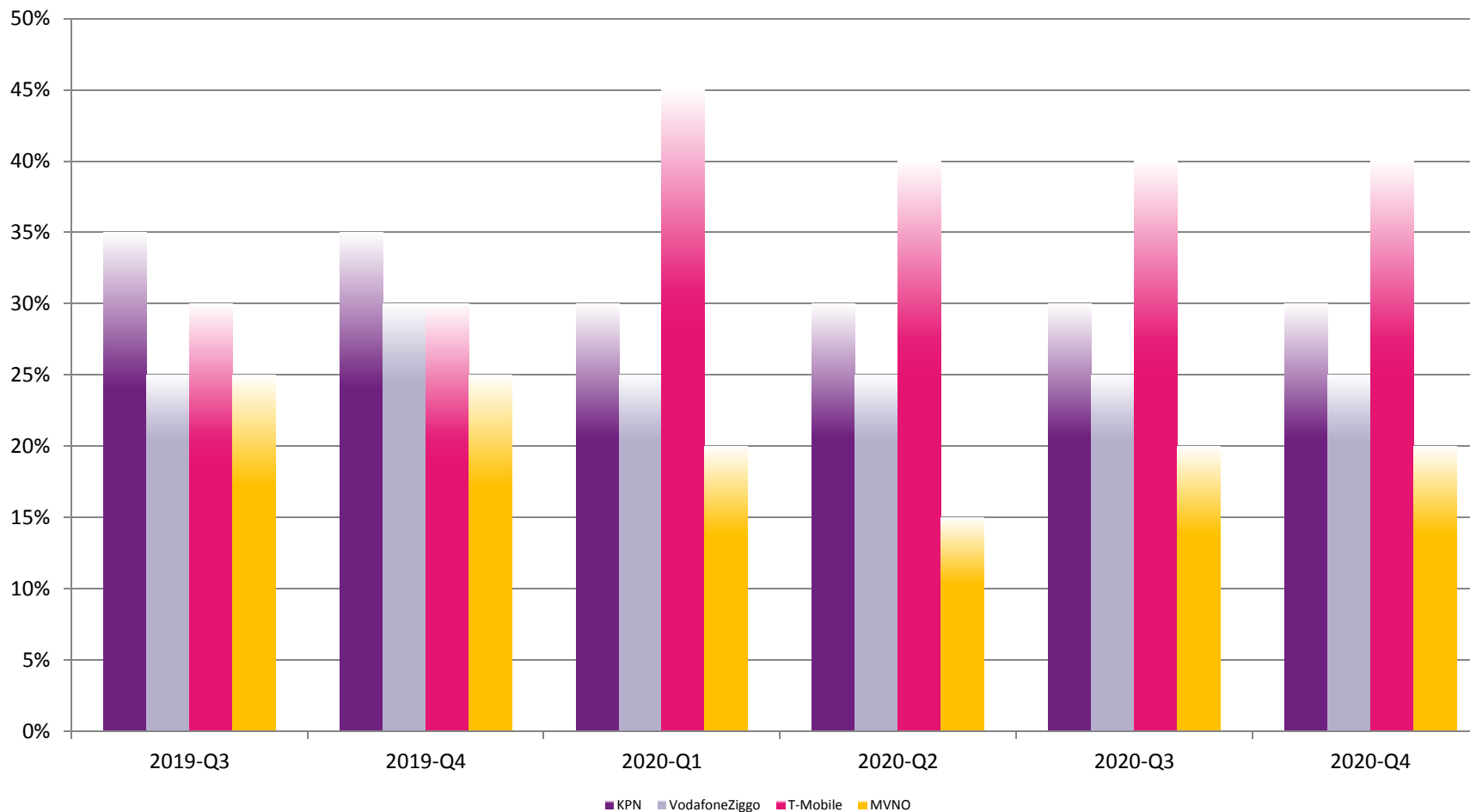
## Retail volume of voice minutes and SMS/text



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

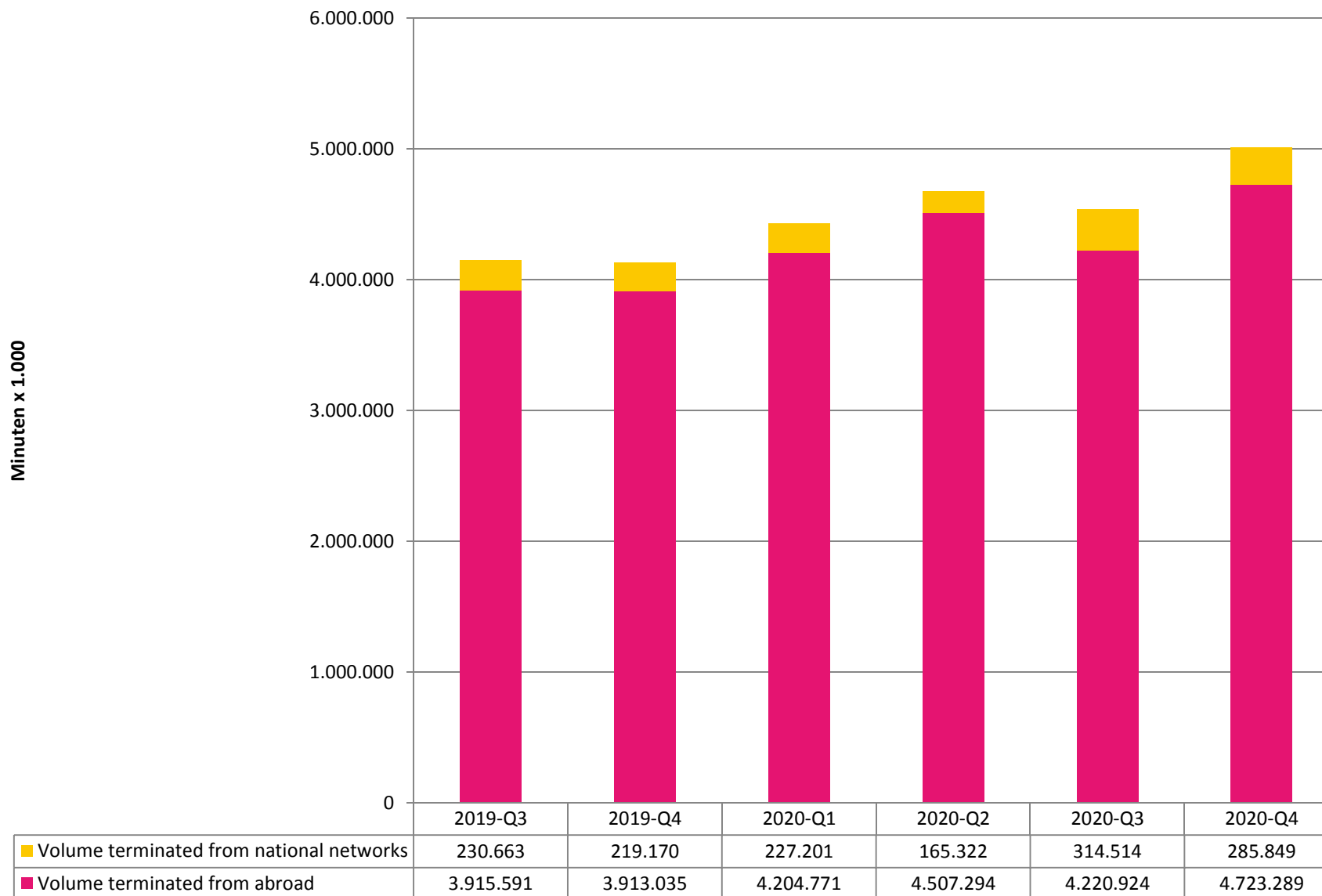


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
KPN	[30 - 35%]	[30 - 35%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
VodafoneZiggo	[20 - 25%]	[25 - 30%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]
T-Mobile	[25 - 30%]	[25 - 30%]	[40 - 45%]	[35 - 40%]	[35 - 40%]	[35 - 40%]
MVNO	[20 - 25%]	[20 - 25%]	[15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

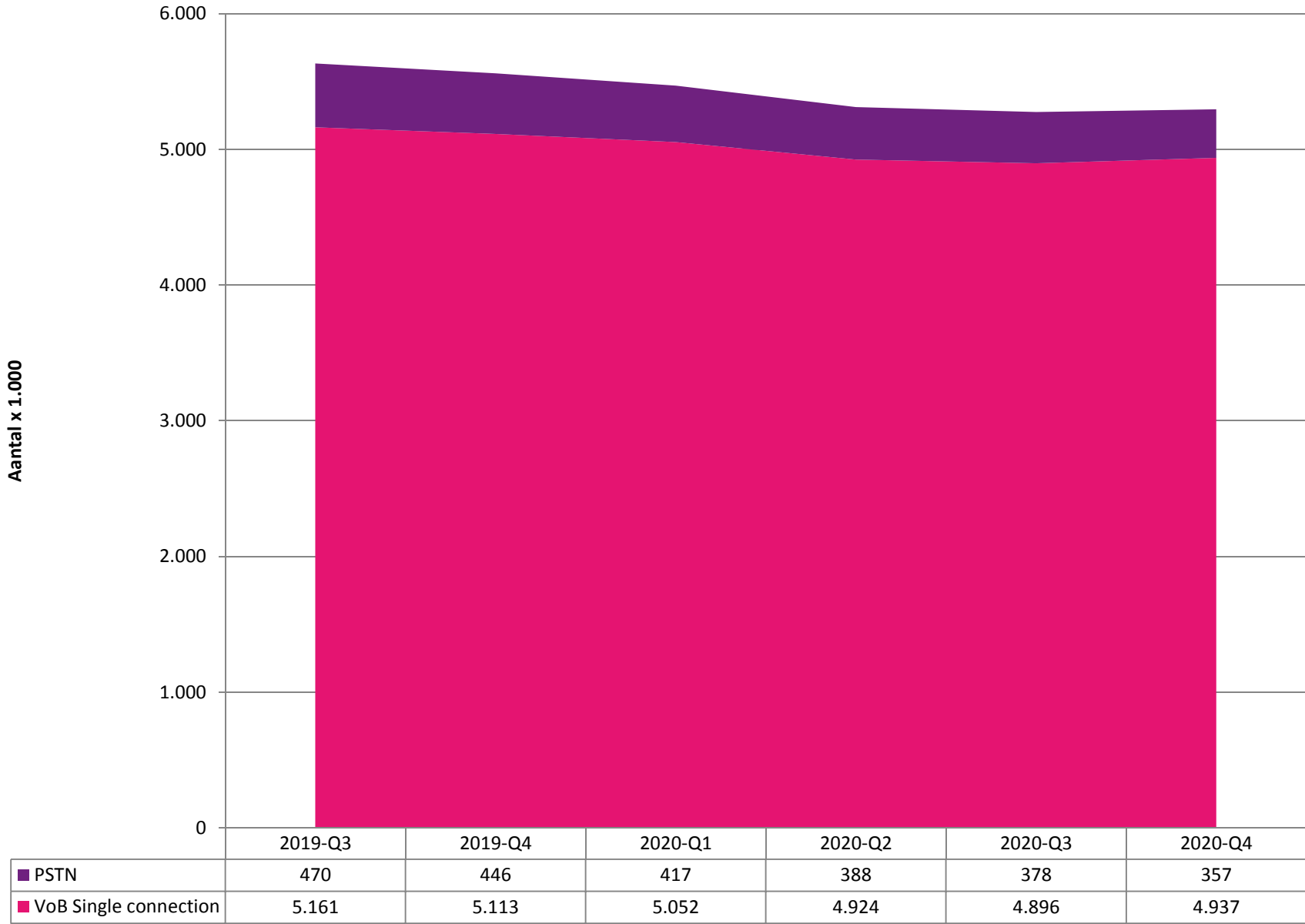
## Wholesale volume of call termination (excluding onnet)



Op basis van vragen 10\_C2\_1\_1-2-3-4-5 van de Telecommonitor

# Fixed telephony

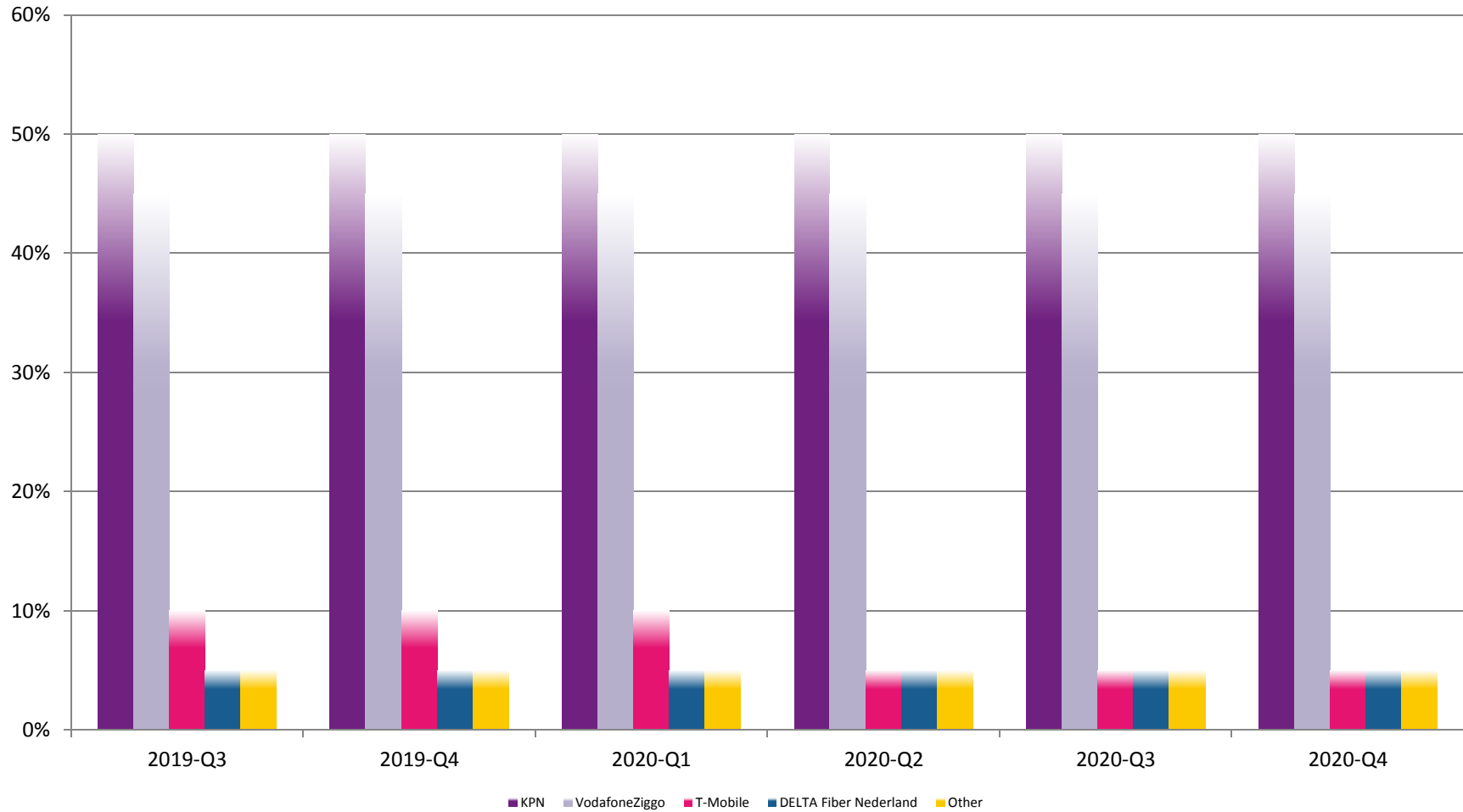
## Retail single connections



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

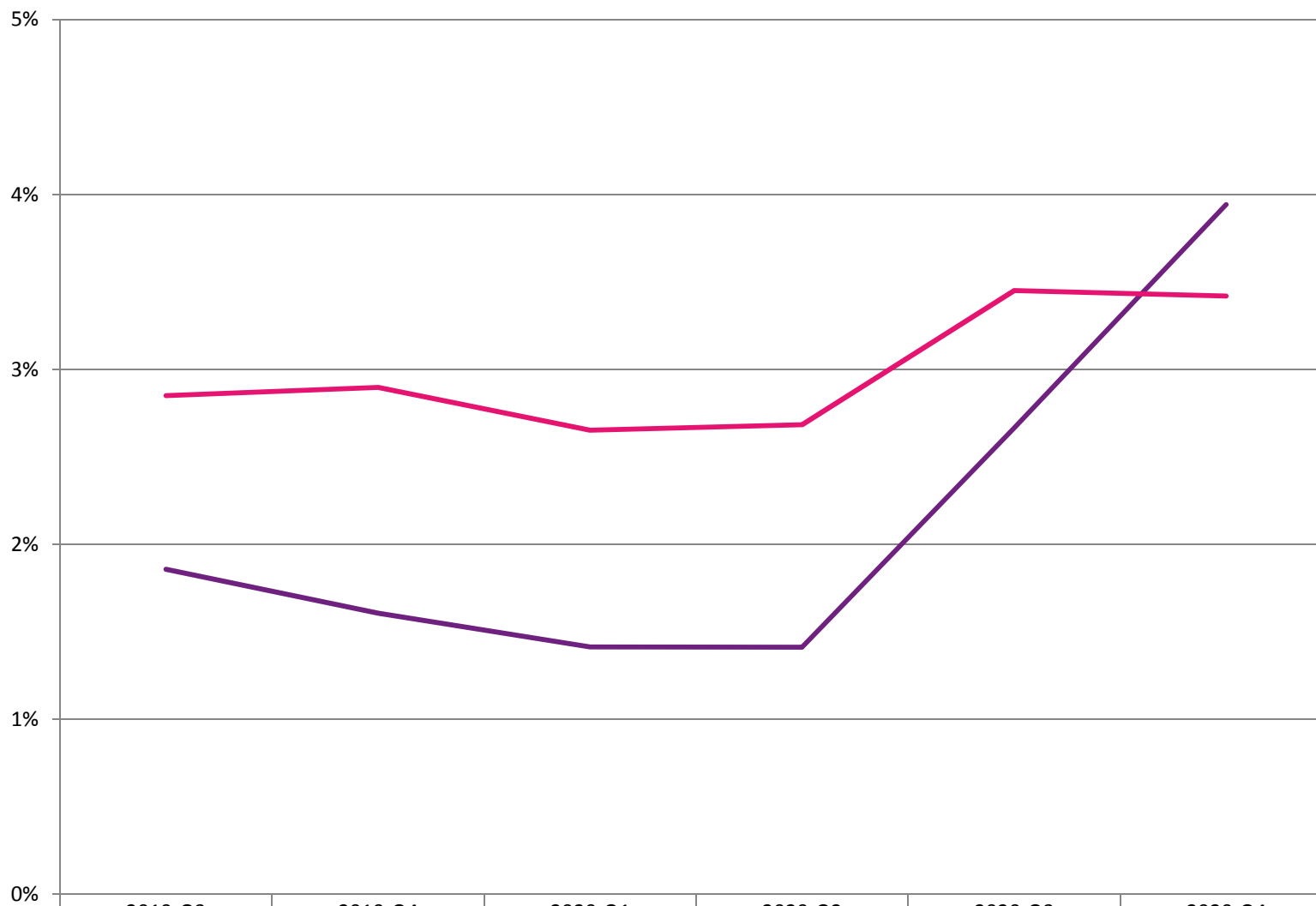


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
KPN	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
VodafoneZiggo	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 5%]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



Op basis van vragen 20\_A2\_1\_1-2 en 20\_A2\_7\_1-2 van de Telecommonitor

# Fixed telephony

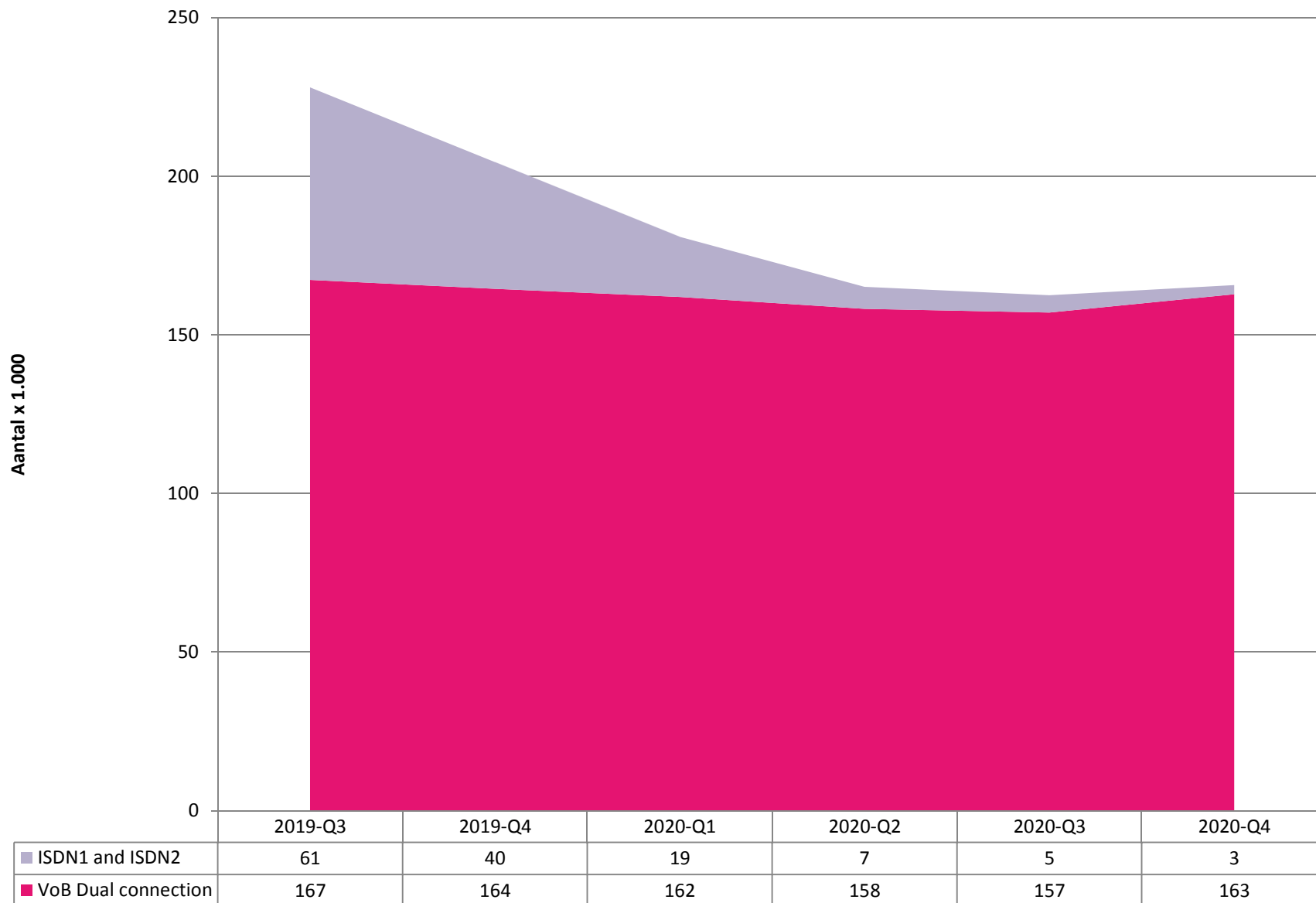
## Retail turnover PSTN and VoB



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

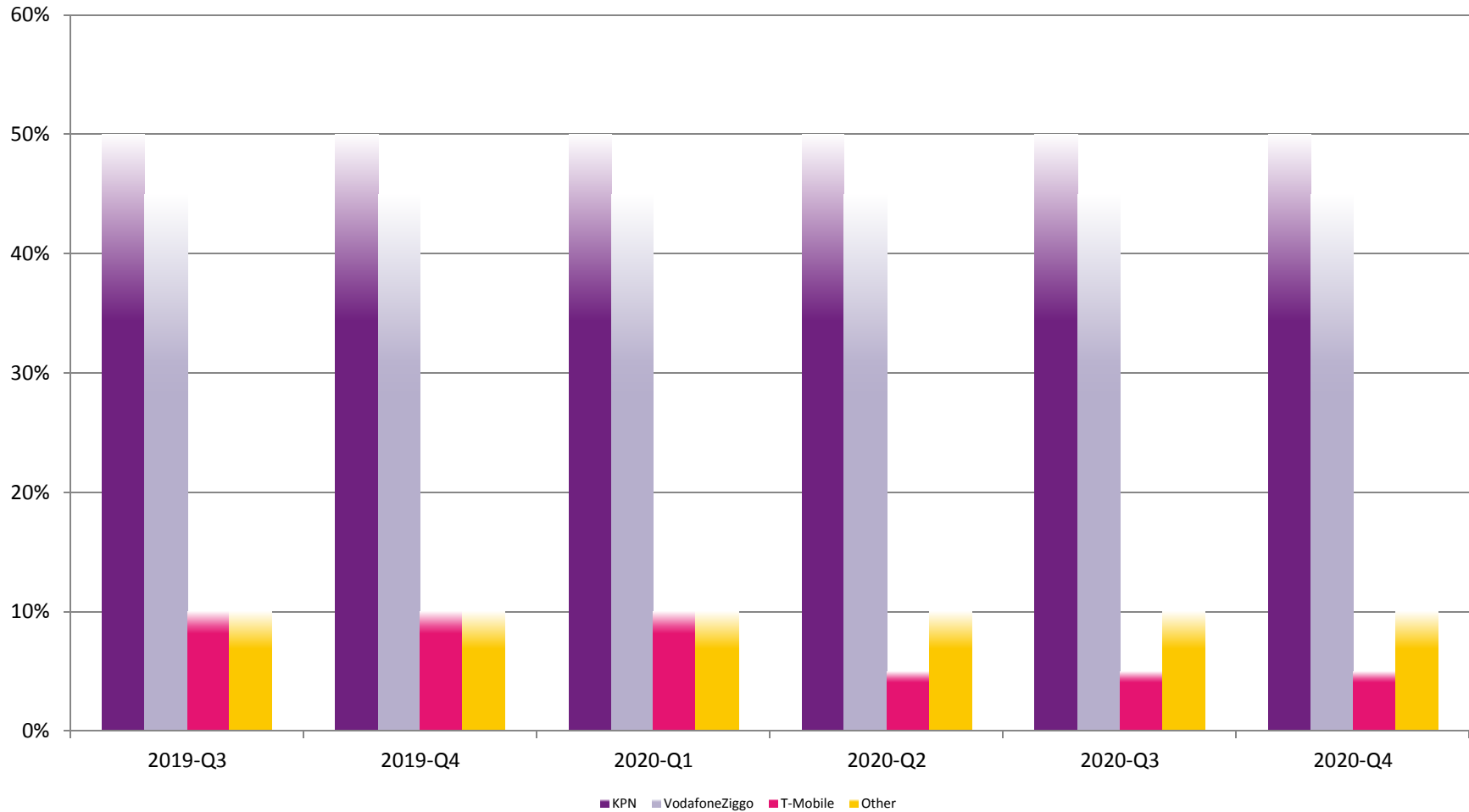


Op basis van vragen 20\_A1\_2\_1-2-3-4-5-6, 20\_A1\_3\_1-2-3-4-5-6, en 20\_A1\_8\_1-2-3-4-5 van de Telecommonitor



# Fixed telephony

## Retail market share based on dual connections

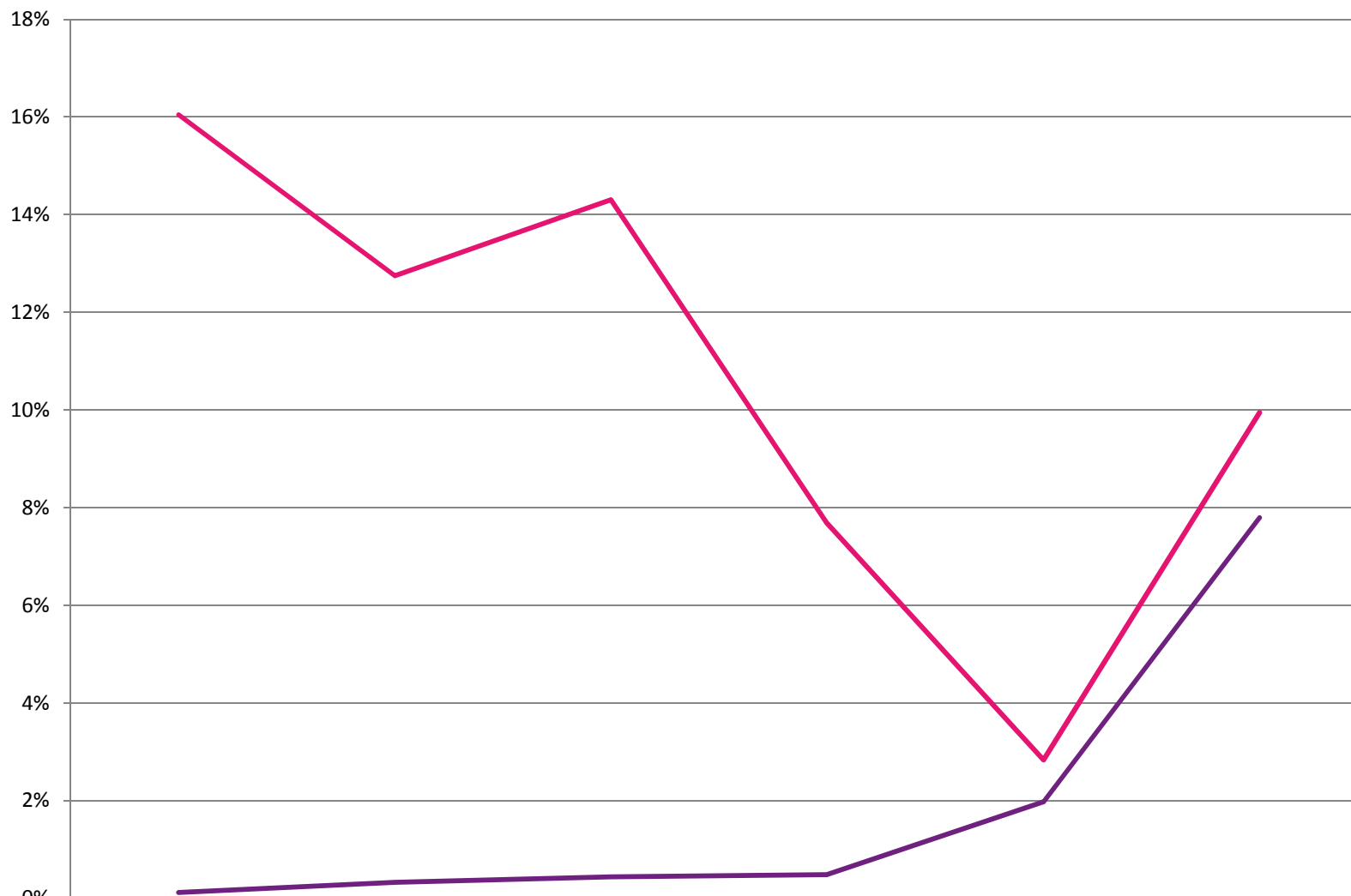


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
KPN	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
VodafoneZiggo	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
Other	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5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

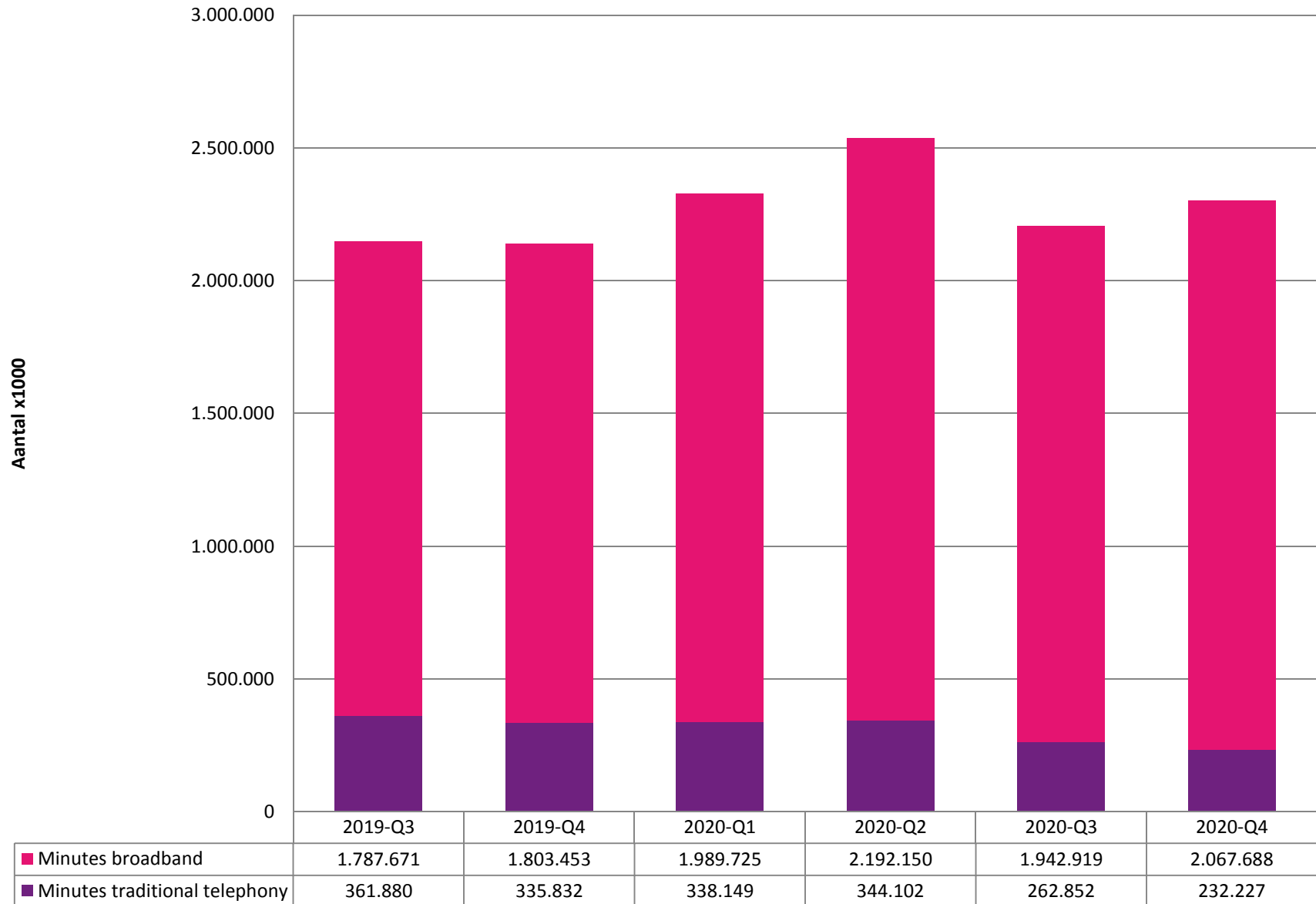
# Fixed telephony

## Retail churn of dual connections



# Fixed telephony

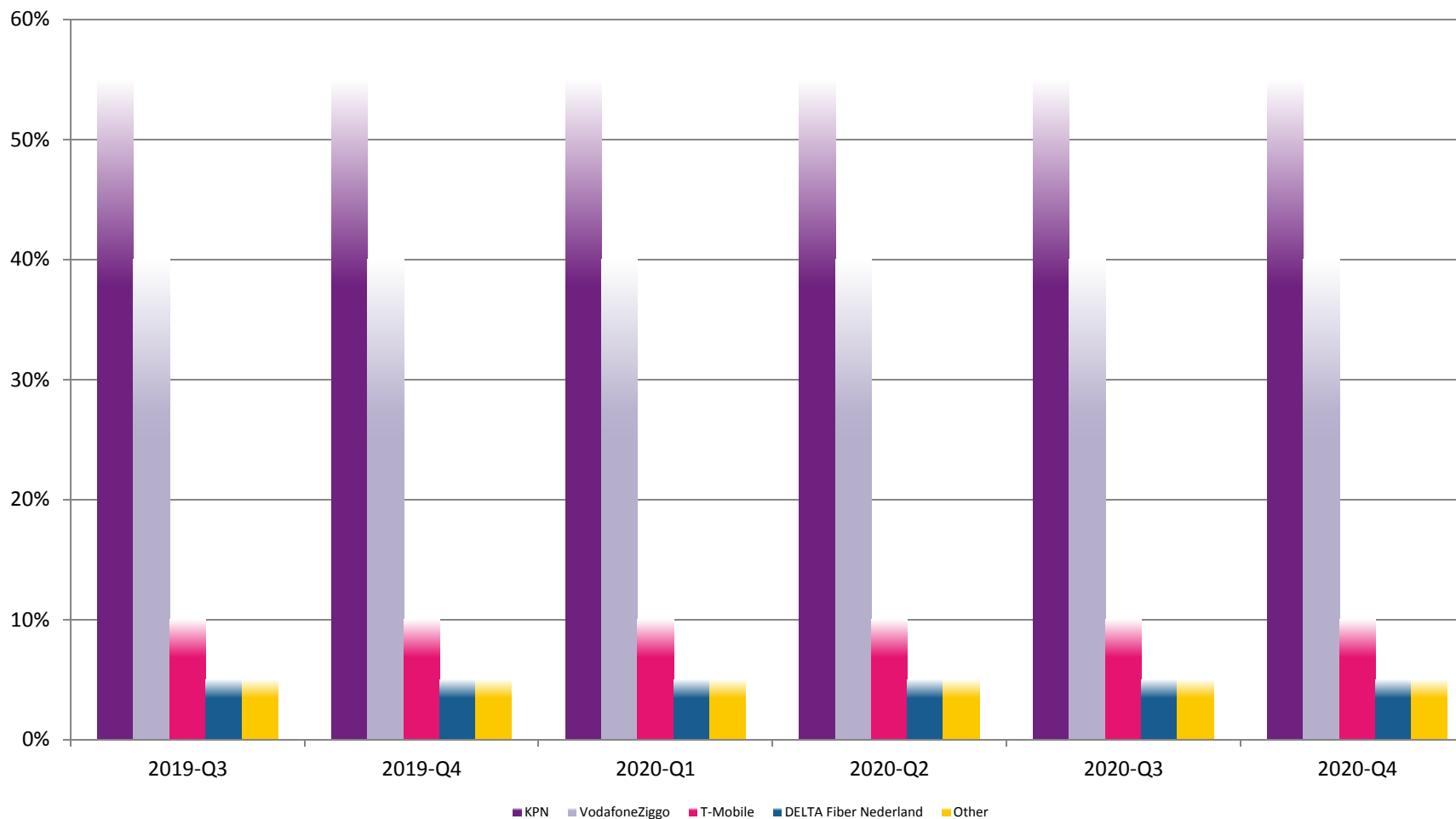
## Retail volume based on voice minutes



Op basis van vragen 20\_A4\_2\_1-2-3-4 van de Telecommonitor

# Fixed telephony

## Retail market share based on voice minutes

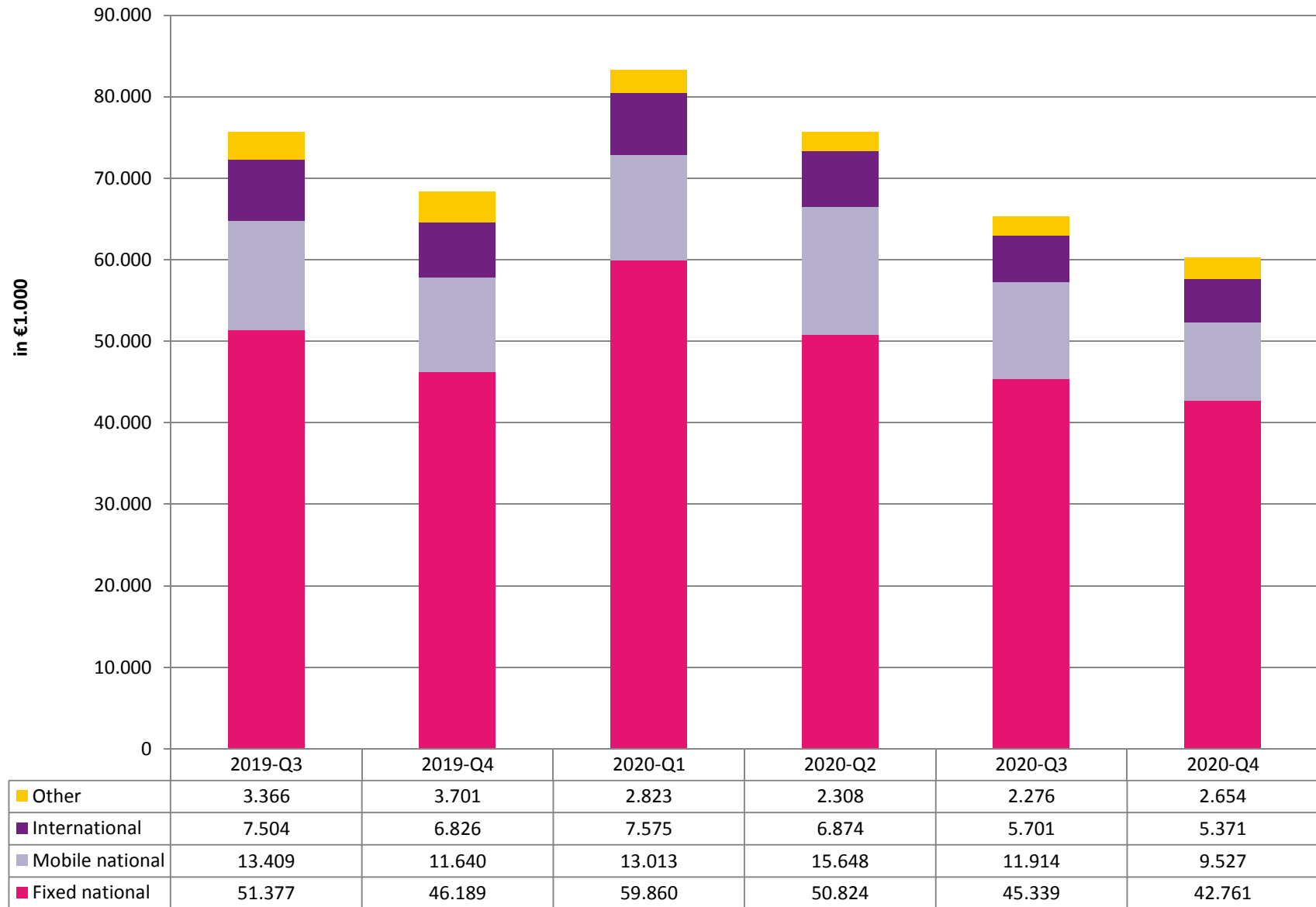


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
KPN	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]
VodafoneZiggo	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
DELTA Fiber Nederland	[0 - 5%]	[0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

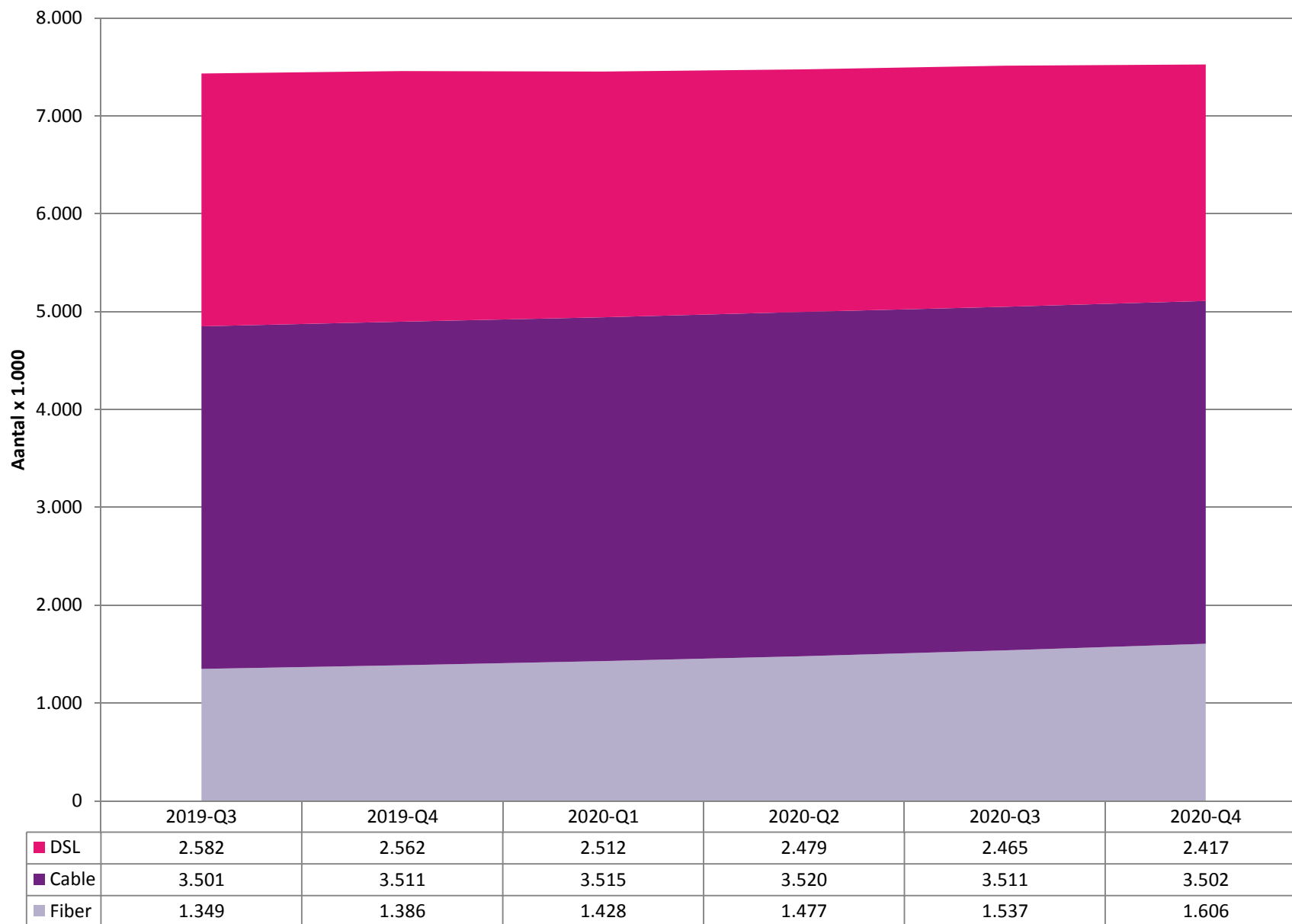
# Fixed telephony

## Retail turnover per type of traffic



# Broadband

## Retail connections per type

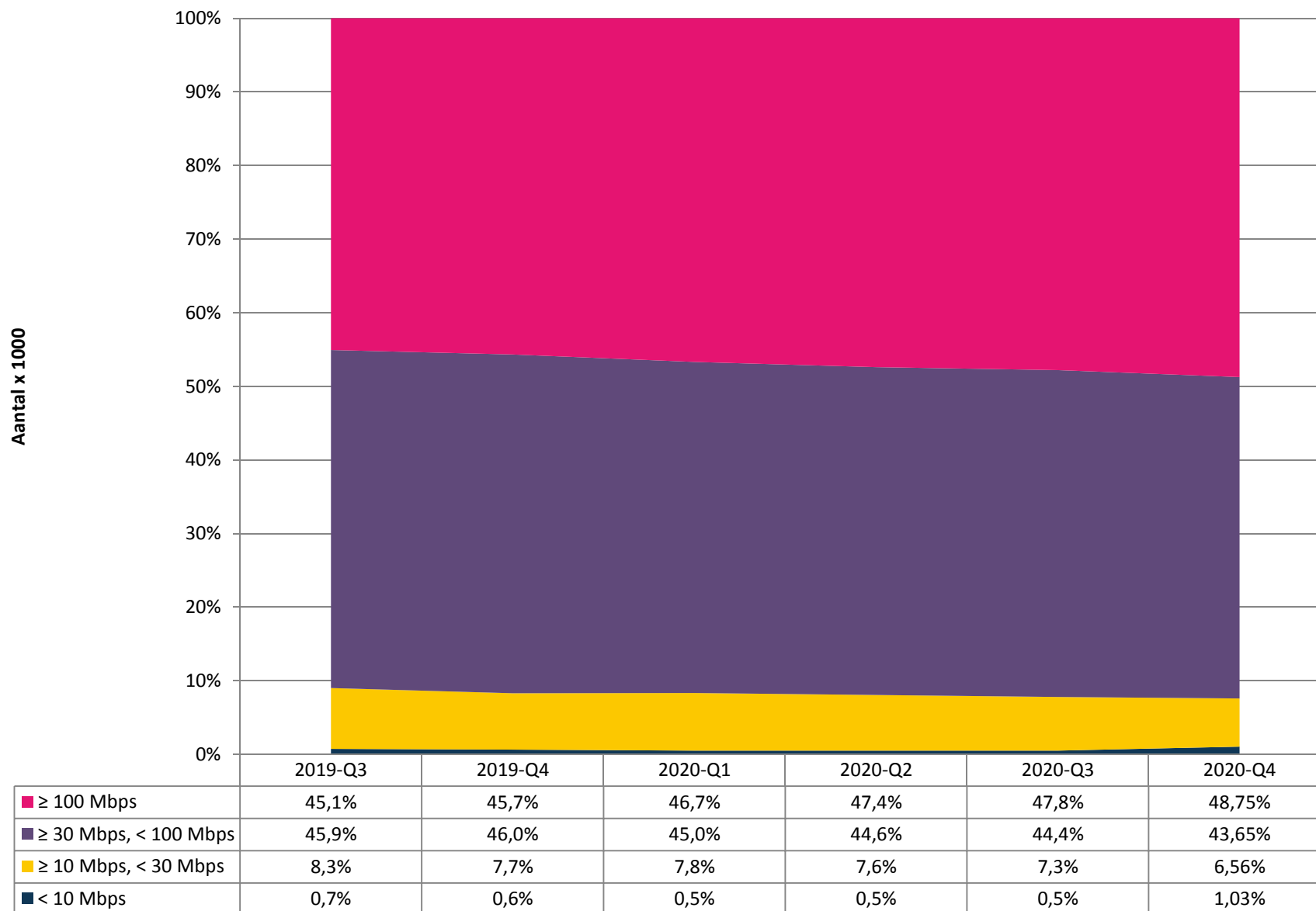


Op basis van vragen 30\_A1\_1\_1-2-3-4-5, 30\_A1\_2\_1-2-3-4-5, 30\_A1\_3\_1-2-3-4-5, 30\_A1\_4\_1-2-3-4-5, 30\_A1\_5\_1-2-3-4-5, en 30\_A1\_6\_1 van de Telecommonitor

\*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



Aantal x 1000



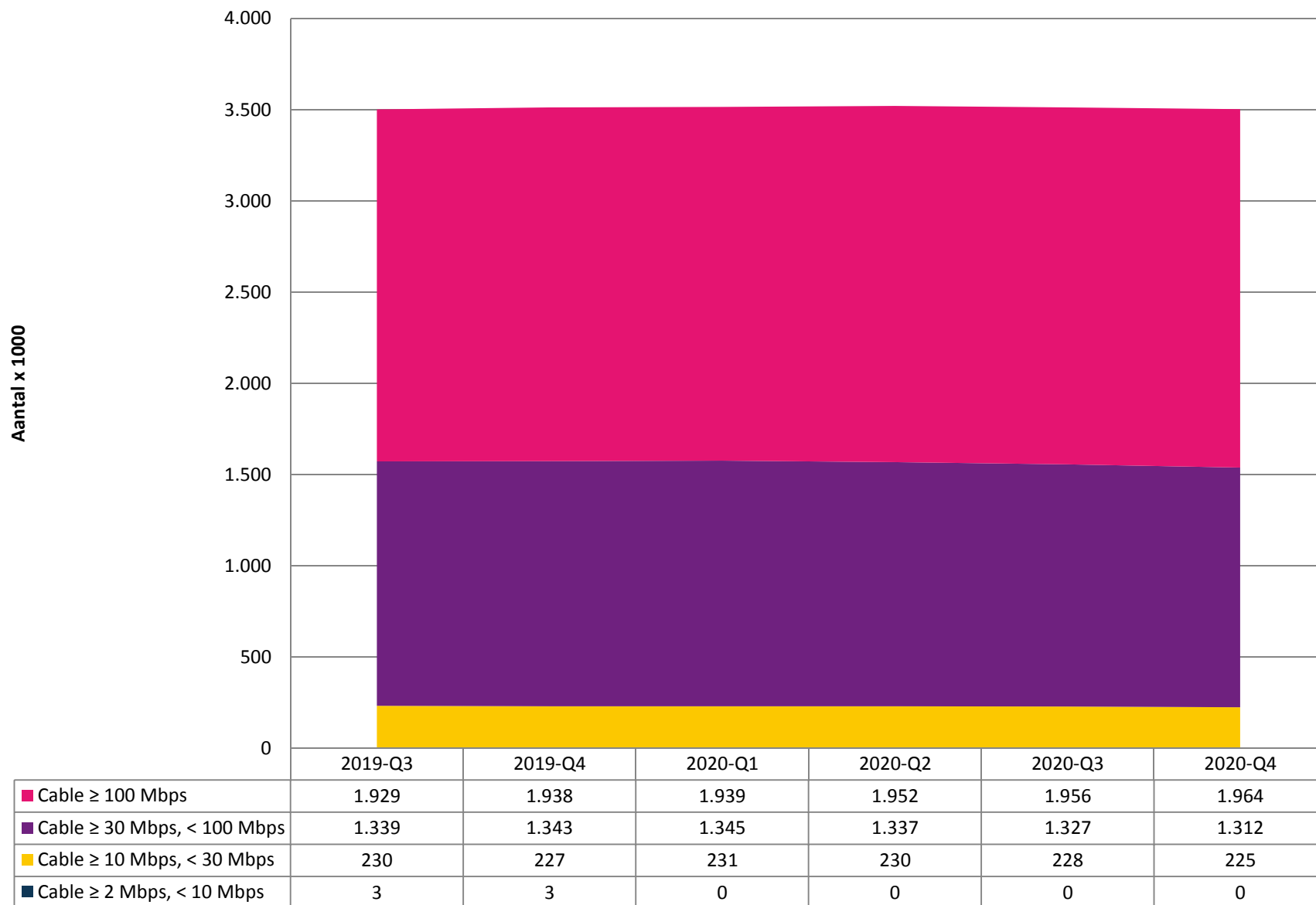
	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
■ DSL ≥ 100 Mbps	680	705	693	703	704	711
■ DSL ≥ 30 Mbps, < 100 Mbps	1.493	1.494	1.458	1.432	1.432	1.389
■ DSL ≥ 10 Mbps, < 30 Mbps	359	318	323	308	293	242
■ DSL ≥ 2Mbps, < 10 Mbps	46	40	35	33	33	72

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

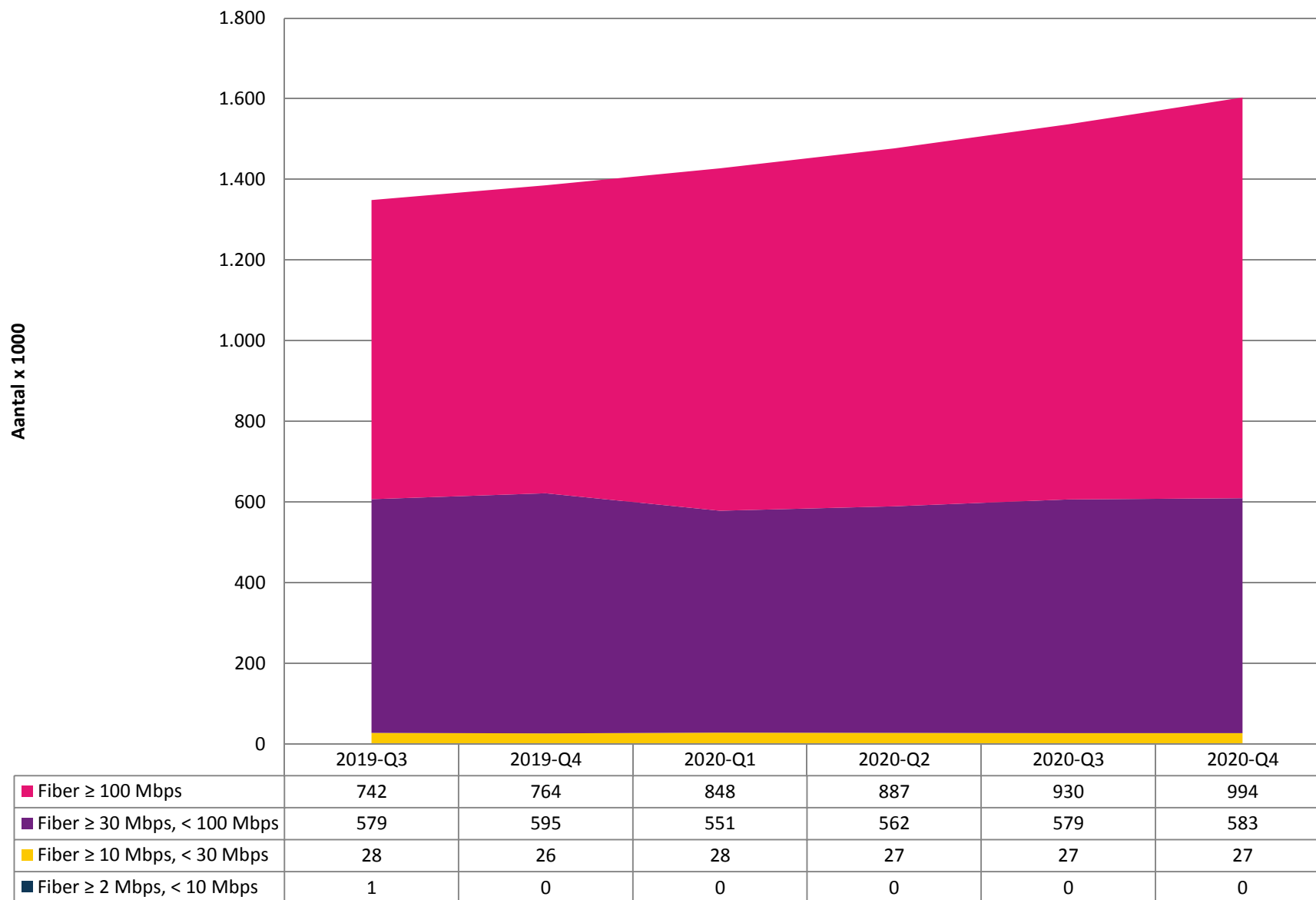
## Retail cable connections by speed



Op basis van vragen 30\_A1\_3\_1-2-3-4-5 van de Telecommonitor. Snelheid op basis van geadverteerde snelheid

# Broadband

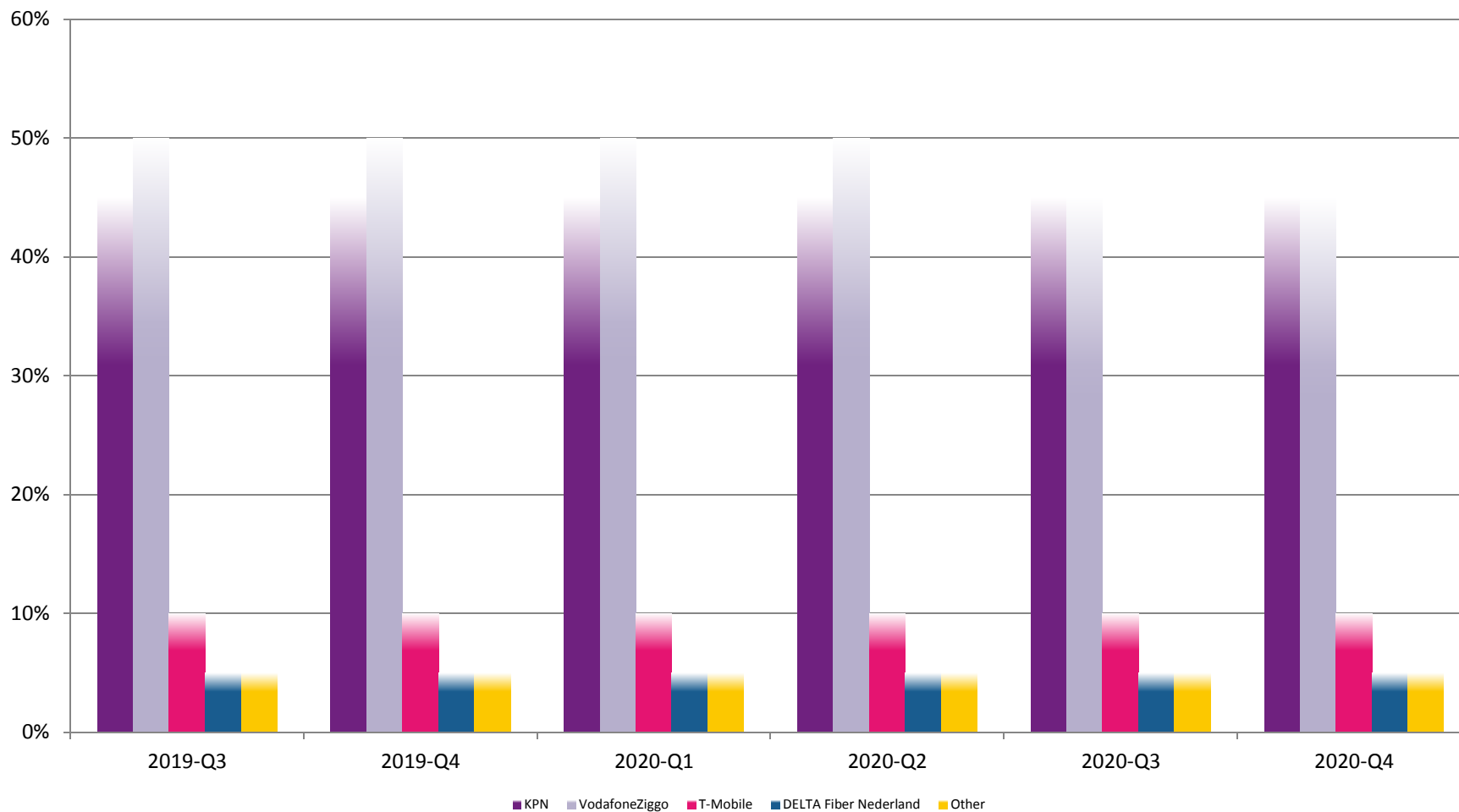
## Retail fiber-optic connections by speed



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

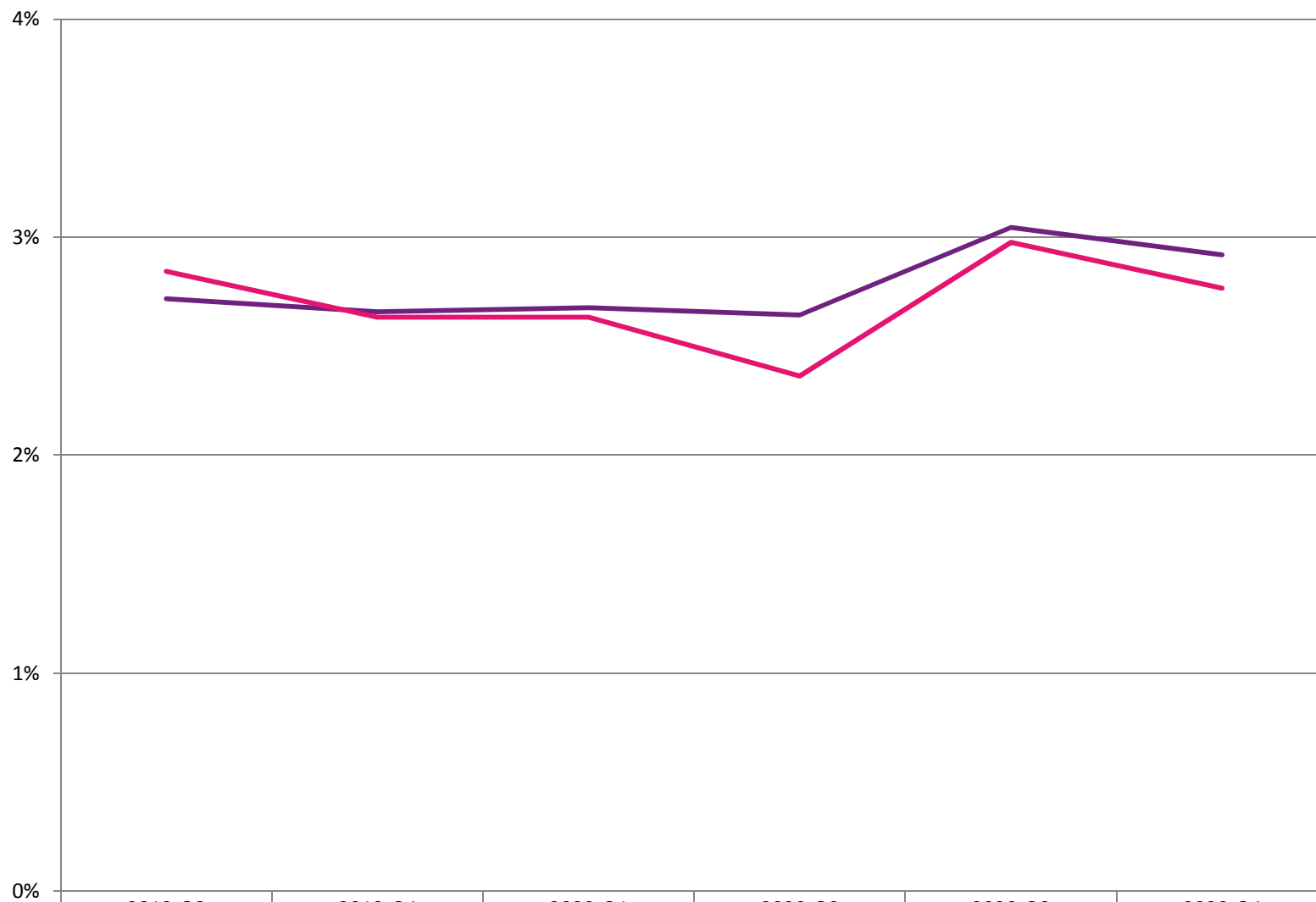


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
KPN	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
VodafoneZiggo	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[40 - 45%]	[40 - 45%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
DELTA Fiber Nederland	[0 - 5%]	[0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

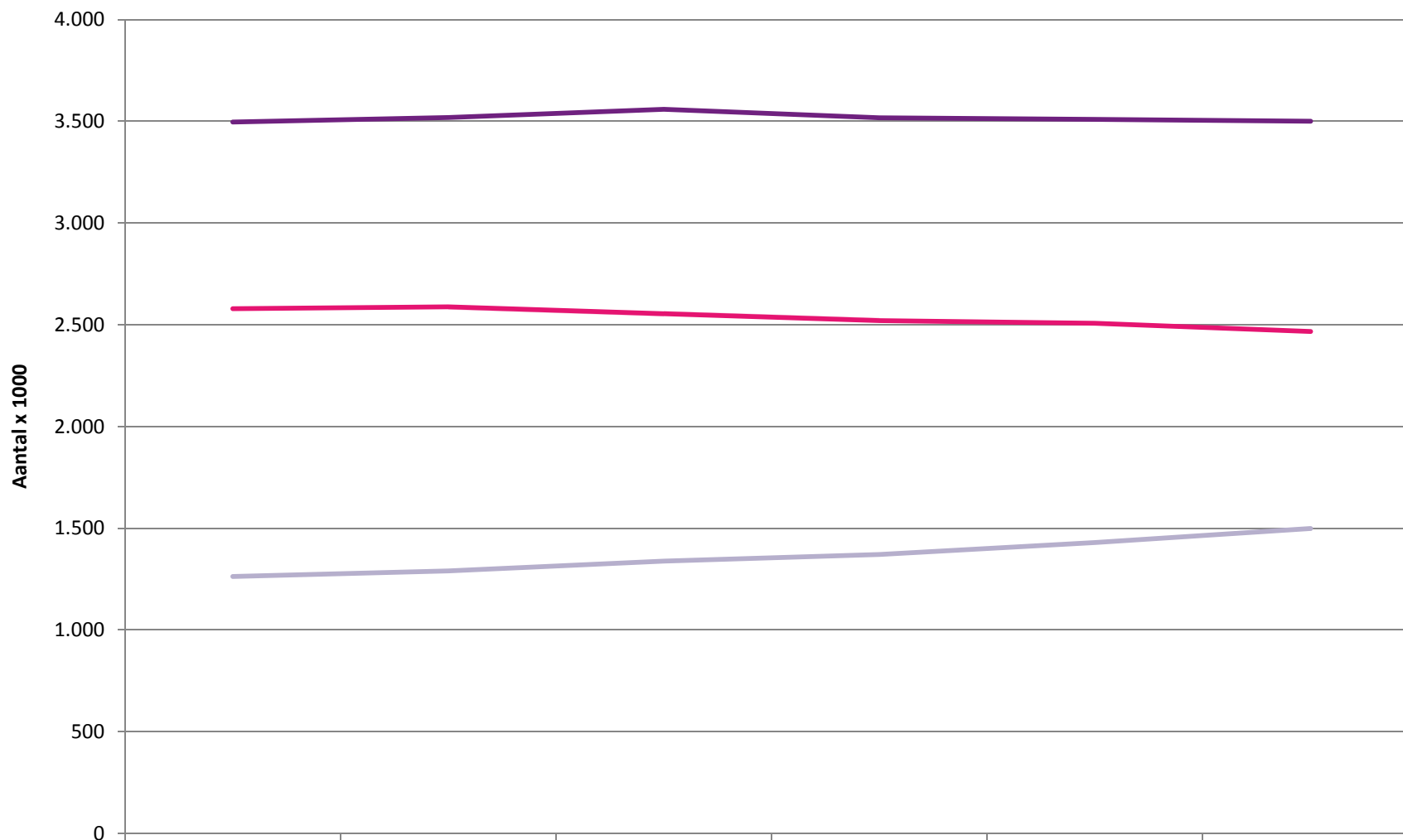
# Broadband

## Retail churn based on connections



# Broadband

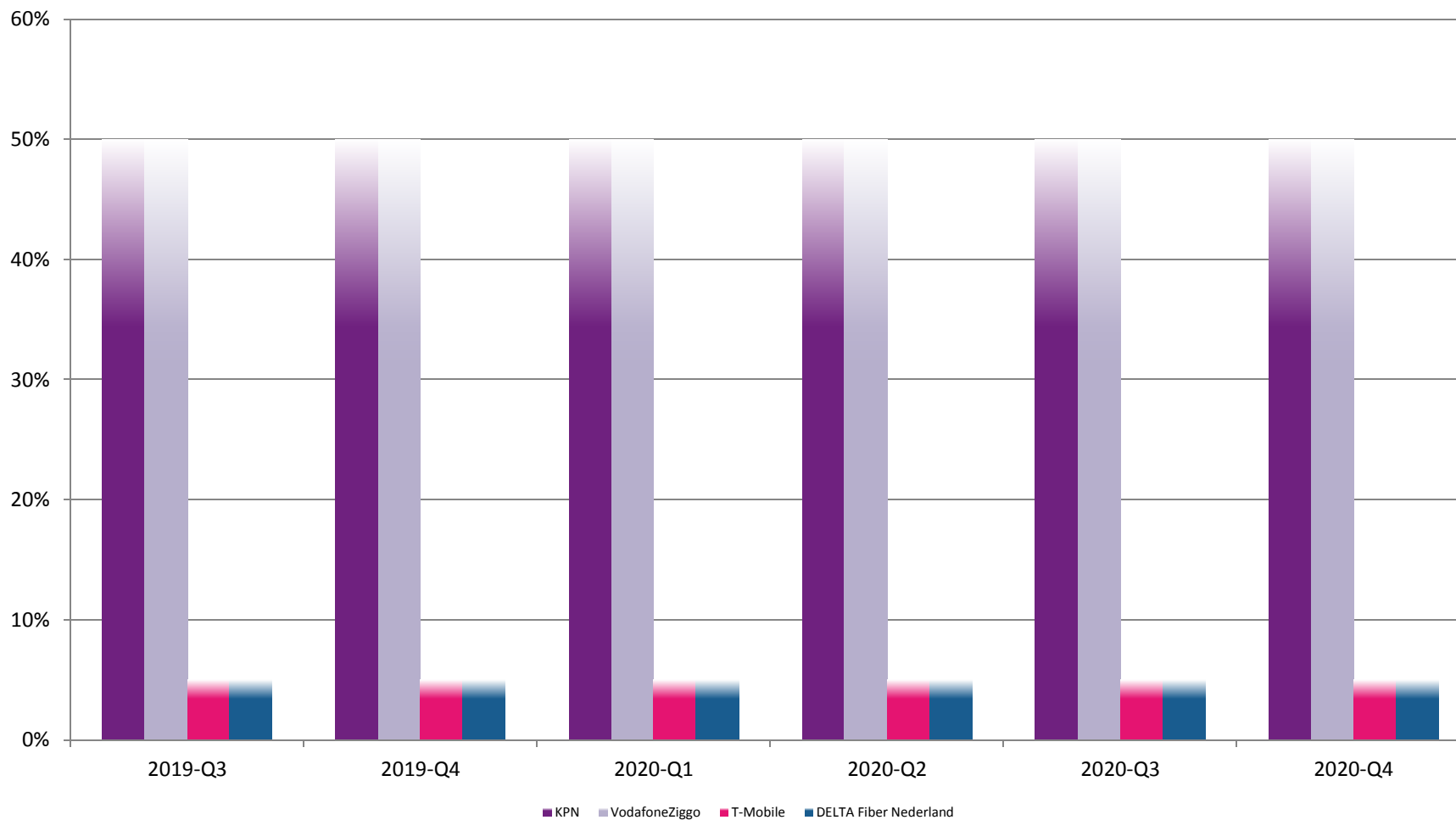
## Low-quality WBT-connections



	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

# Broadband

## Market share based on low-quality WBT-connections

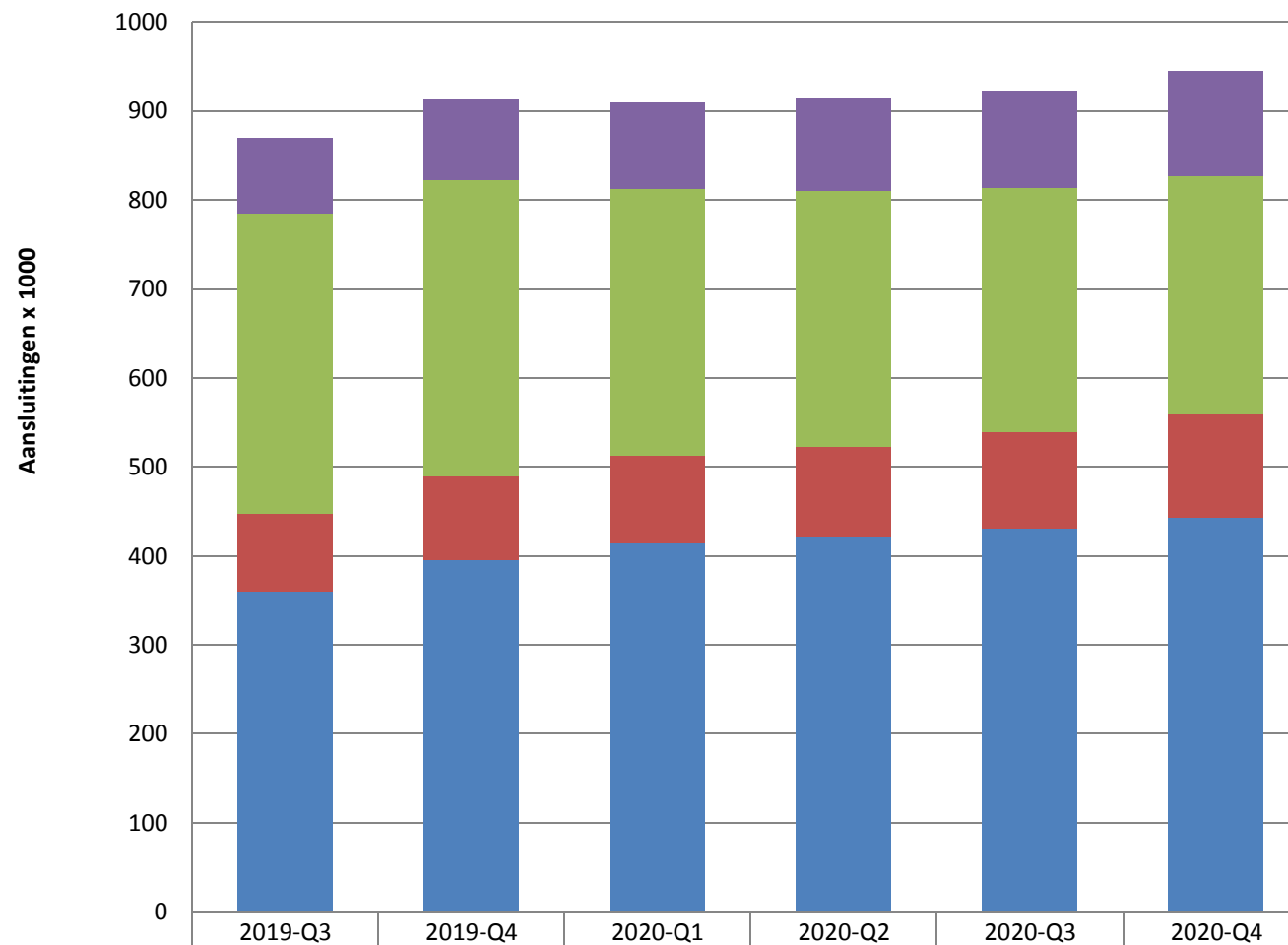


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
KPN	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
VodafoneZiggo	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
T-Mobile	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 5%]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

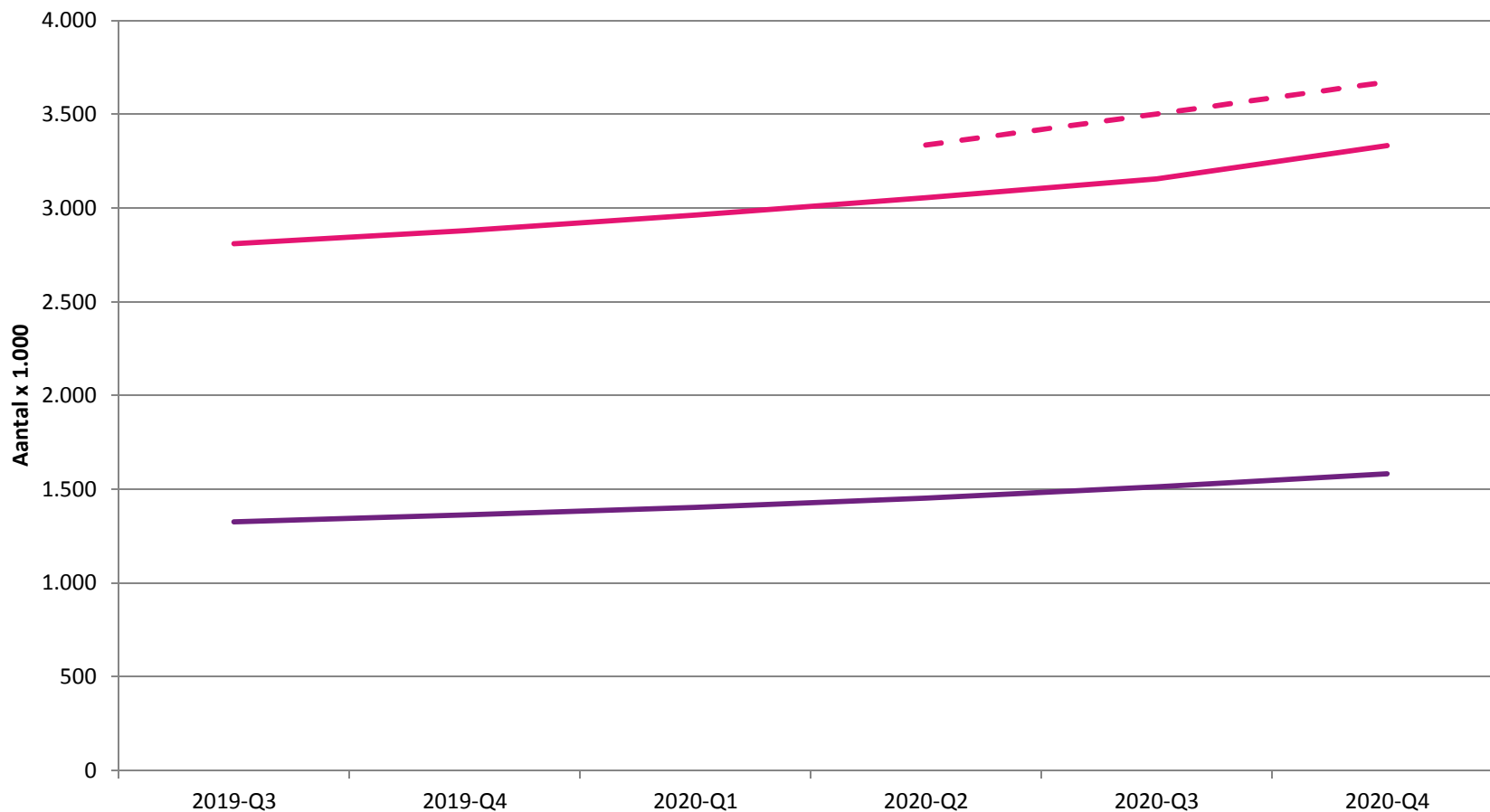


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
■ Unbundled Local Loop Fiber (FttH)	85	90	96	103	109	117
■ (Virtual) Unbundles Local Loop Copper	338	333	299	288	275	268
■ Purchase of active fiber optic connections (FttH)	87	94	99	101	108	116
■ Purchase of active copper connections	360	396	414	421	431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

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 Telecommonitor vijftien kleine en regionale glasvezelaanbieders toegevoegd aan haar reguliere uitvraag.

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

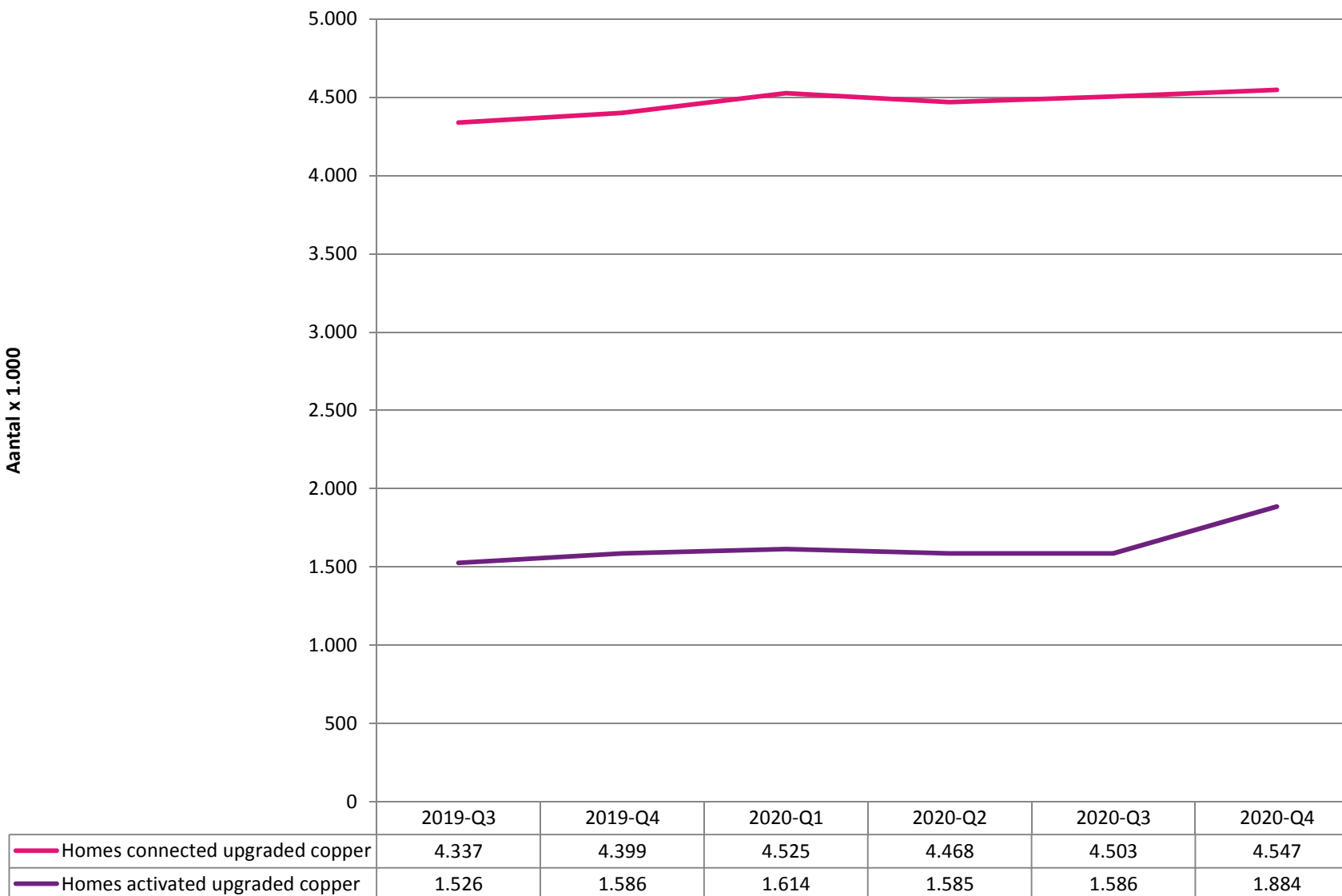


# Broadband

## Homes connected to upgraded copper



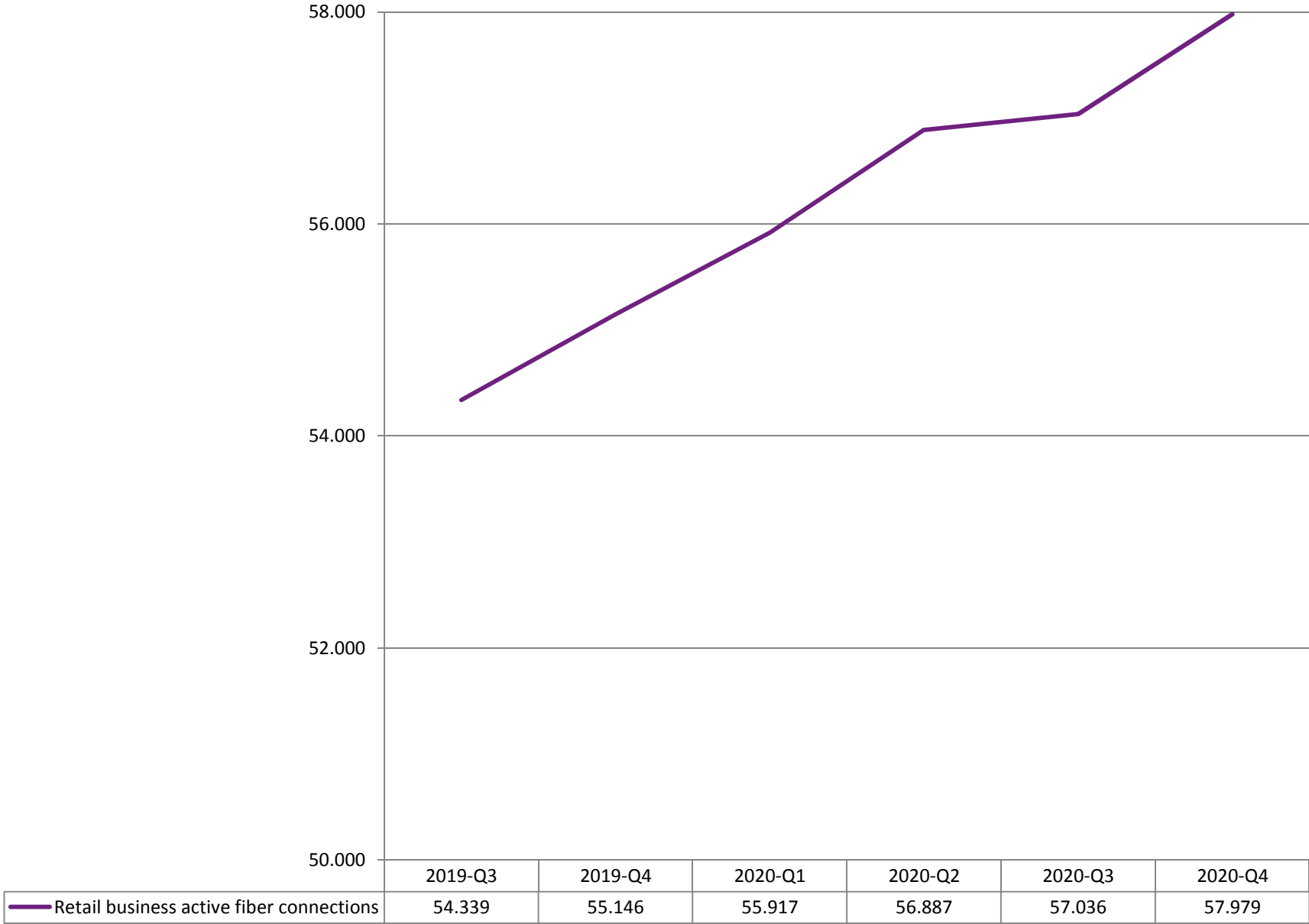
Aantal x 1.000



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

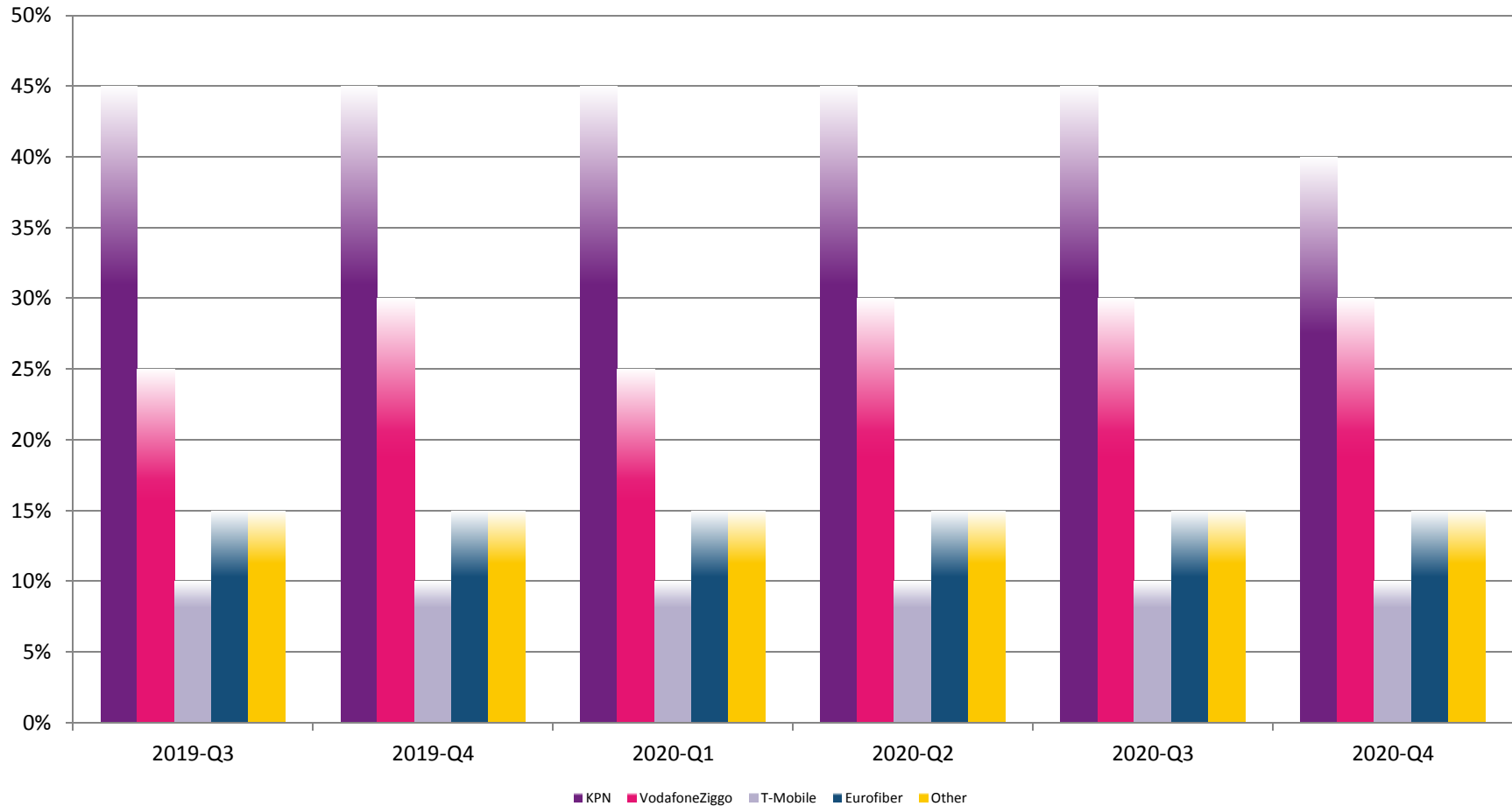
## Retail business fiber-optic connections



Op basis van vragen 30\_A2\_1\_1 van de Telecommonitor. Exclusief aansluitingen kleine en regionale marktpartijen

# Business network services

## Market share based on retail business fiber-optic connections

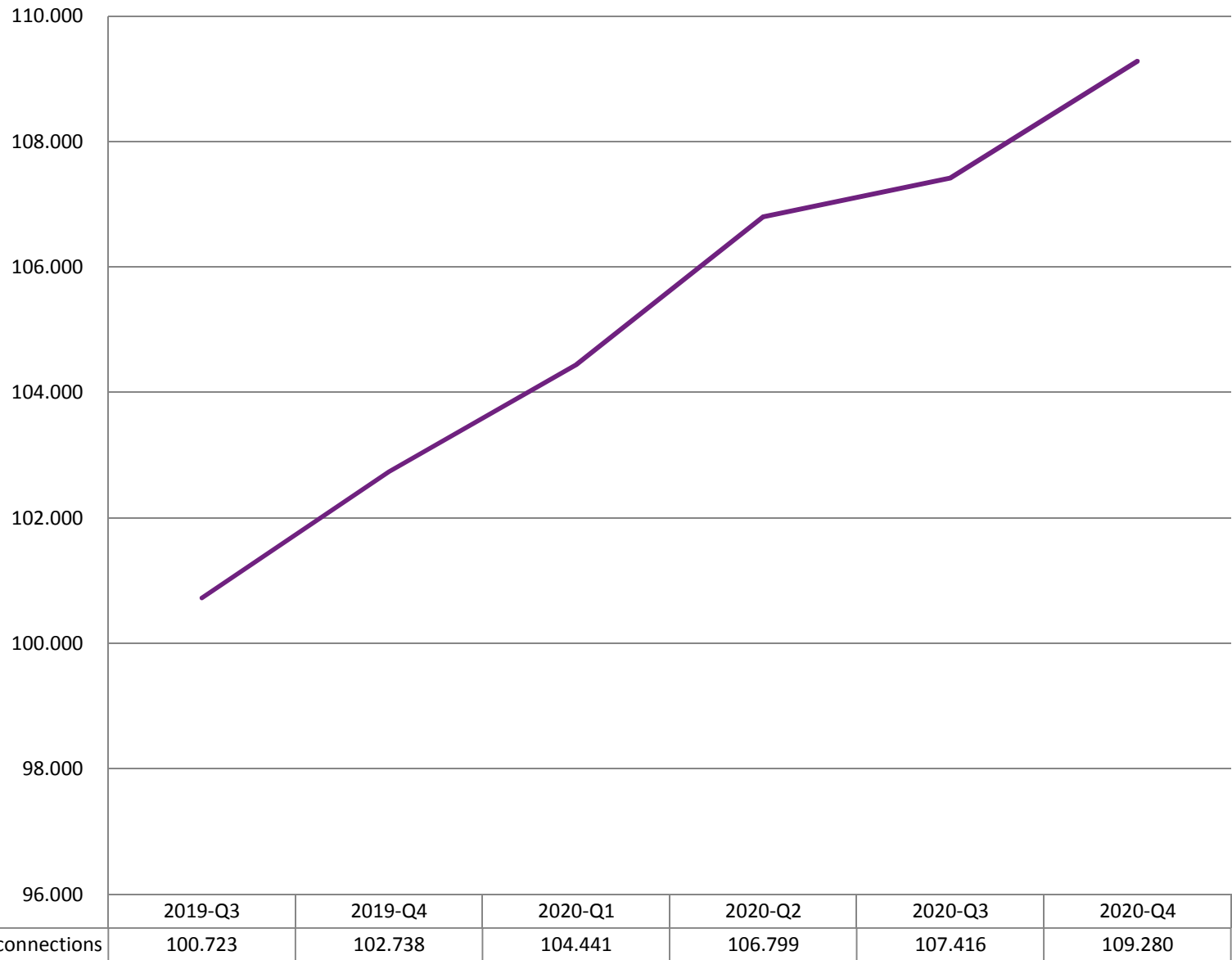


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
KPN	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[35 - 40%]
VodafoneZiggo	[20 - 25%]	[25 - 30%]	[20 - 25%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
Eurofiber	[10 - 15%]	[10 - 15%]	[10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

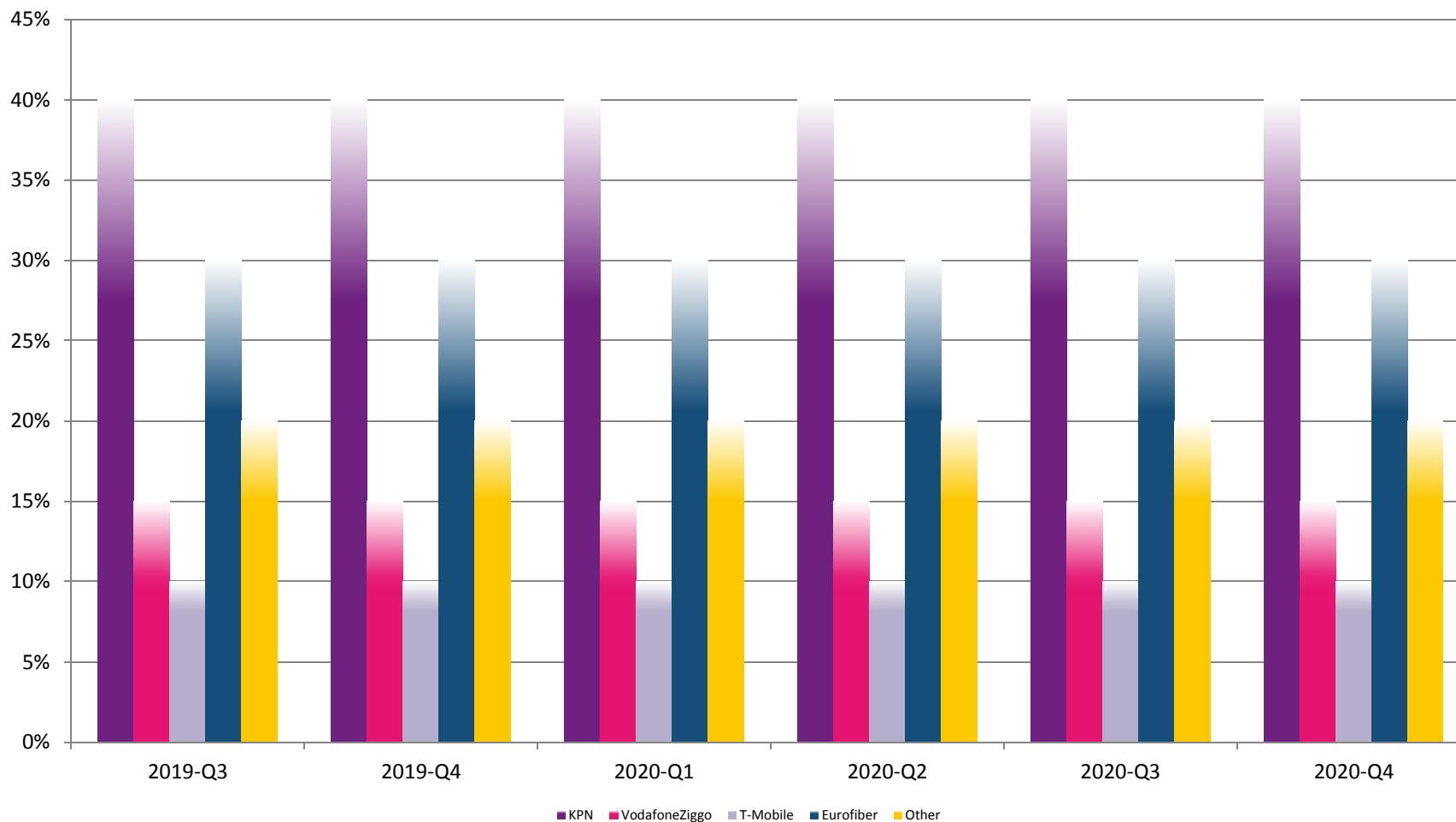
## Wholesale business fiber-optic connections



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-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%]

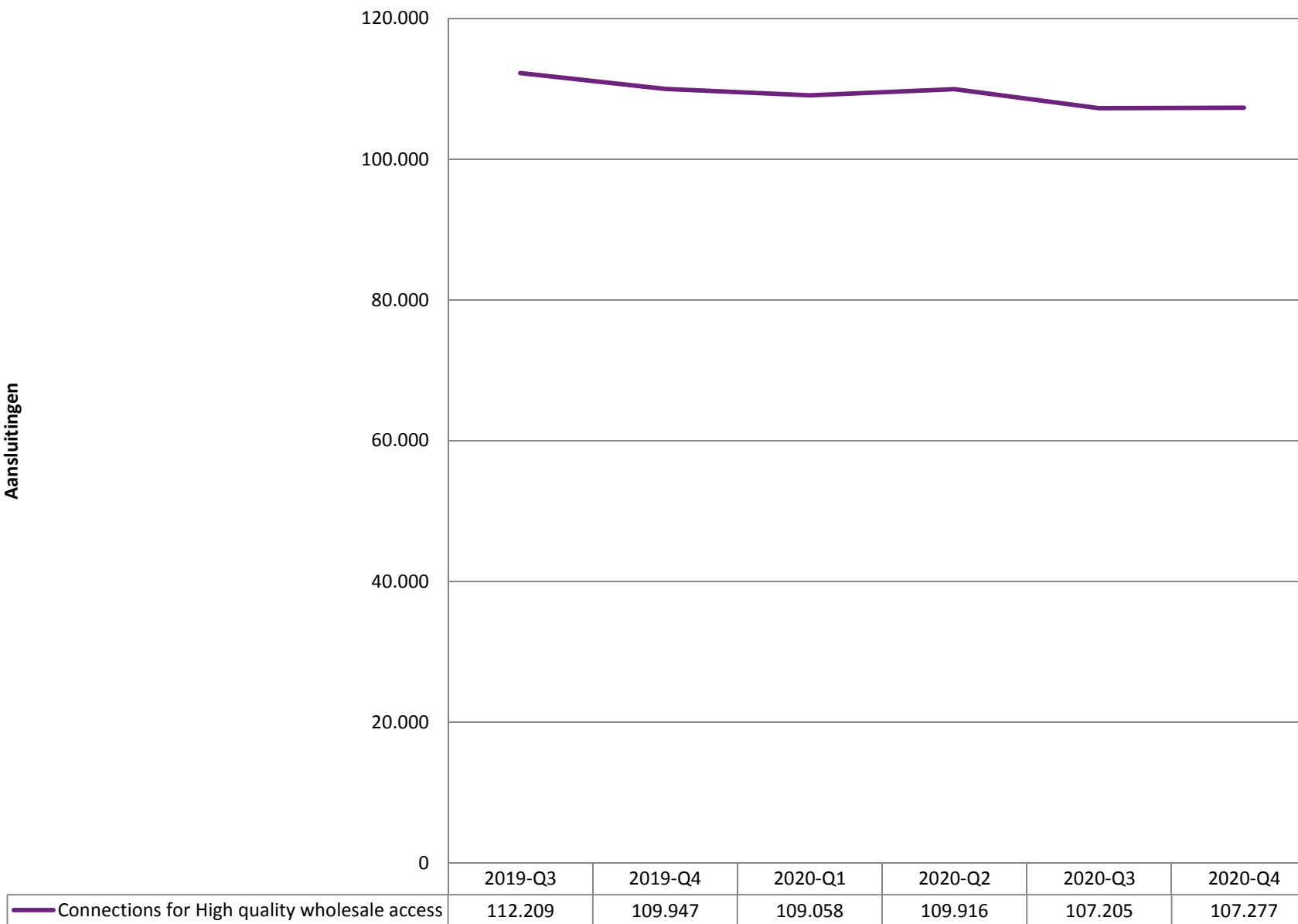
Op basis van vragen 30\_B4\_1\_1-3, 30\_B4\_8\_1, 30, 30\_A2\_1\_1-2, en 30\_A2\_4\_1 van de Telecommonitor. \*Marktaandeel kleine en regionale marktpartijen zijn geschat op 10% (zie marktanalyse ODF-Access (FttO))

# Business network services

## Wholesale HWT and leased lines



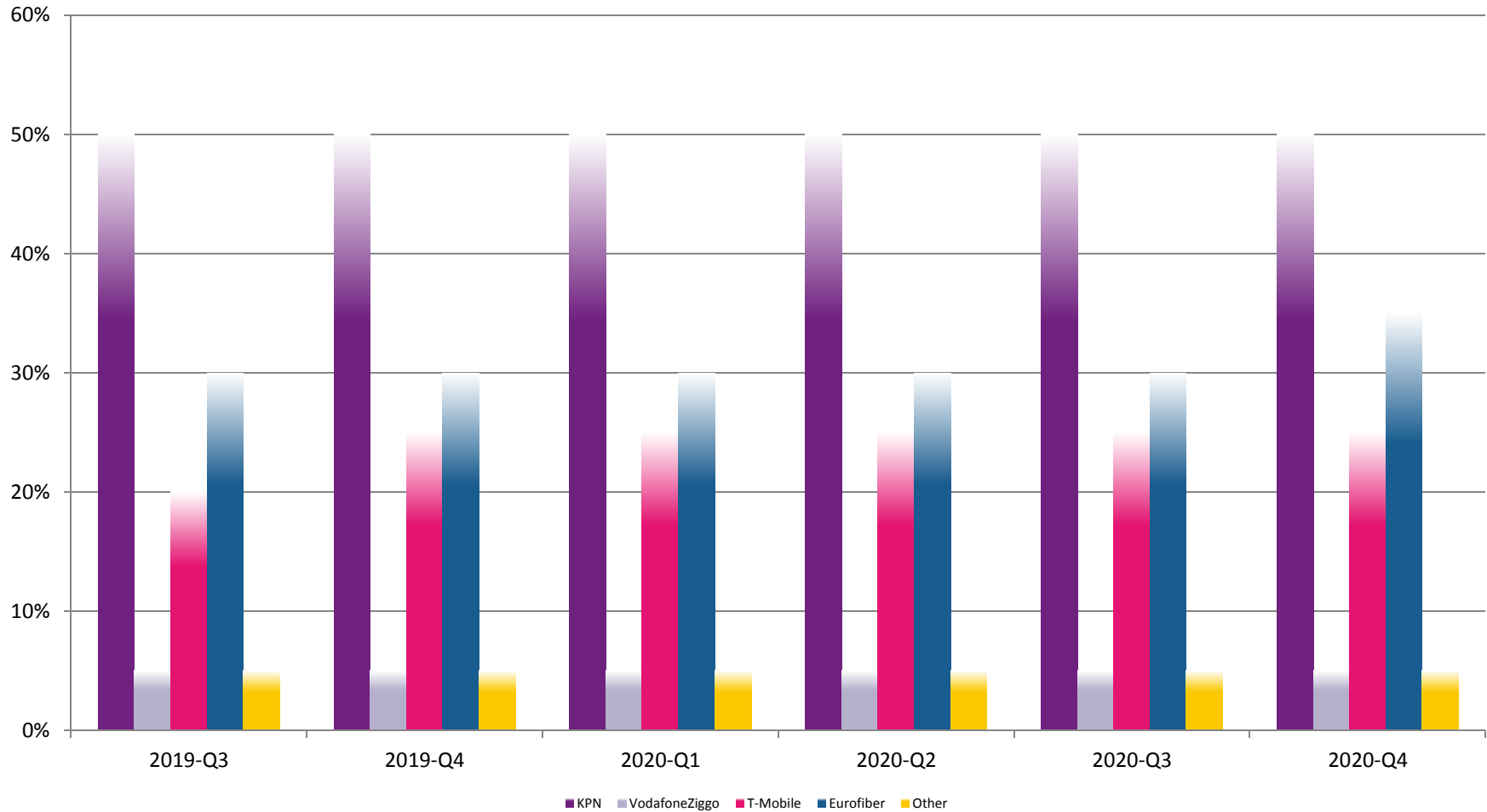
Aansluitingen



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



	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



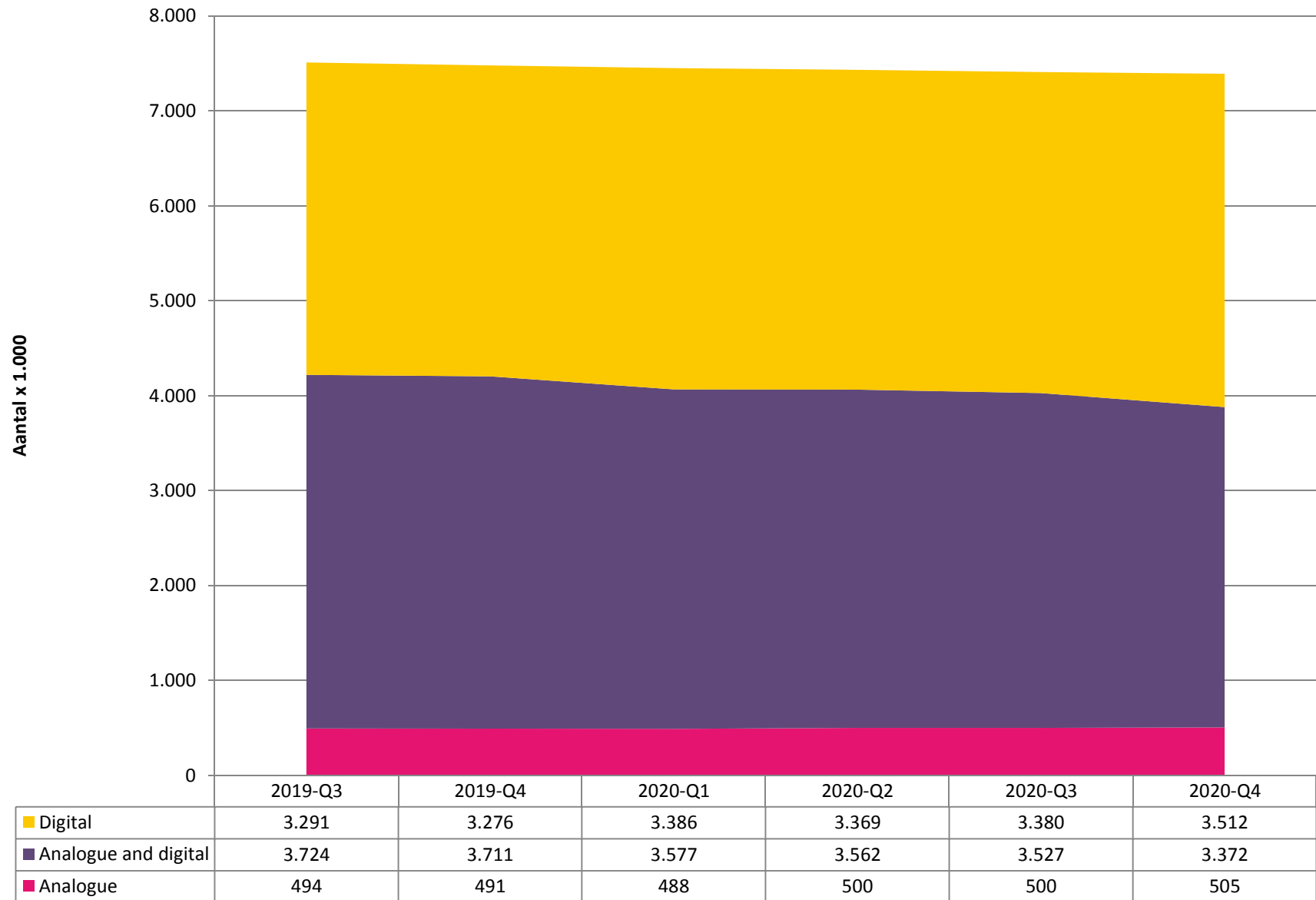
Op basis van vragen 40\_A1\_1\_1-2-3, 40\_A1\_2\_1-2, 40\_A1\_3\_1-2-3, en 40\_A1\_4\_1-2-3-4 van de Telecommonitor

Digitale platforms zijn bijvoorbeeld DSL, Digitenne en Satelliet.



# Television

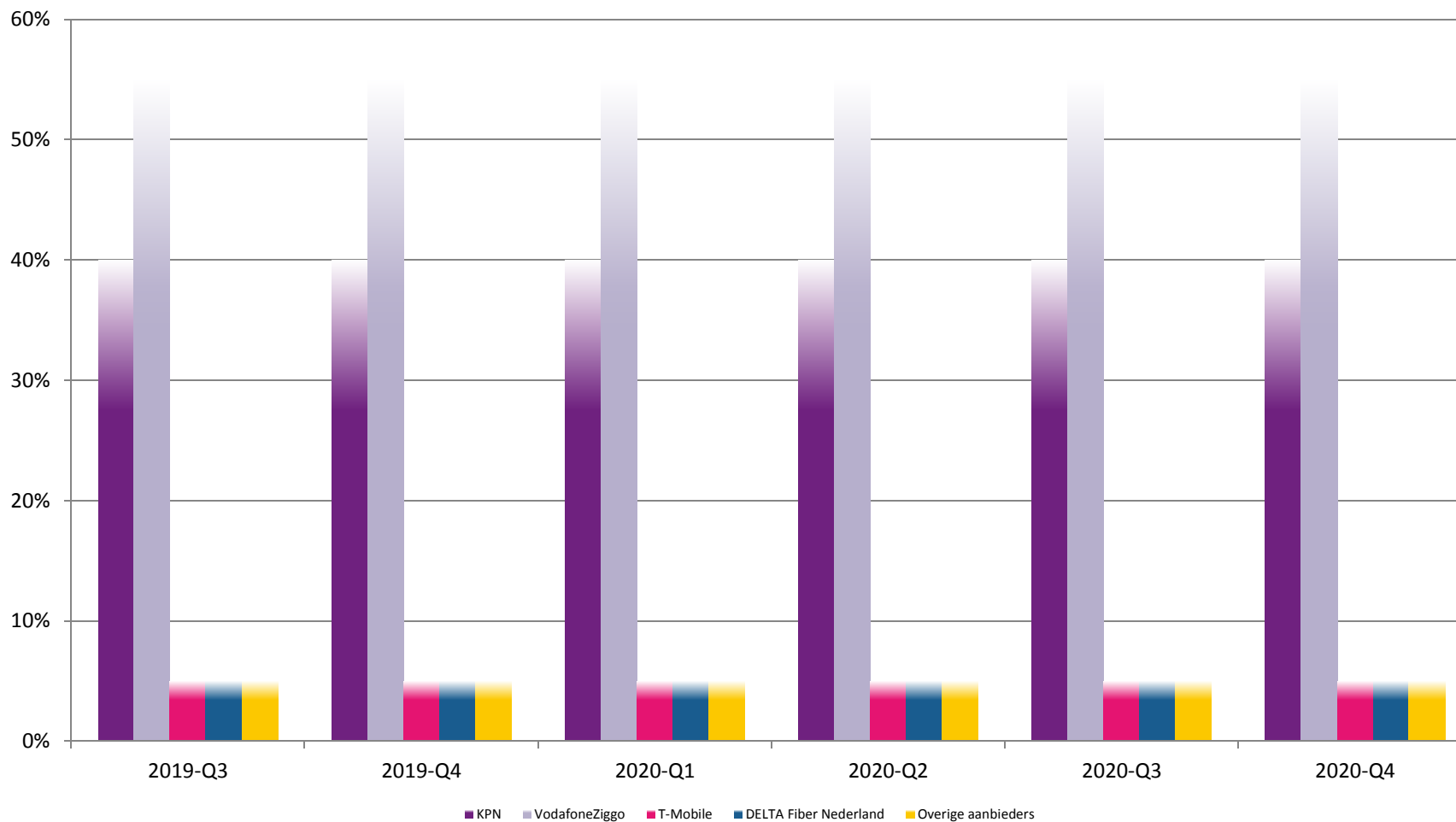
## Digitalization of television subscriptions



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-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

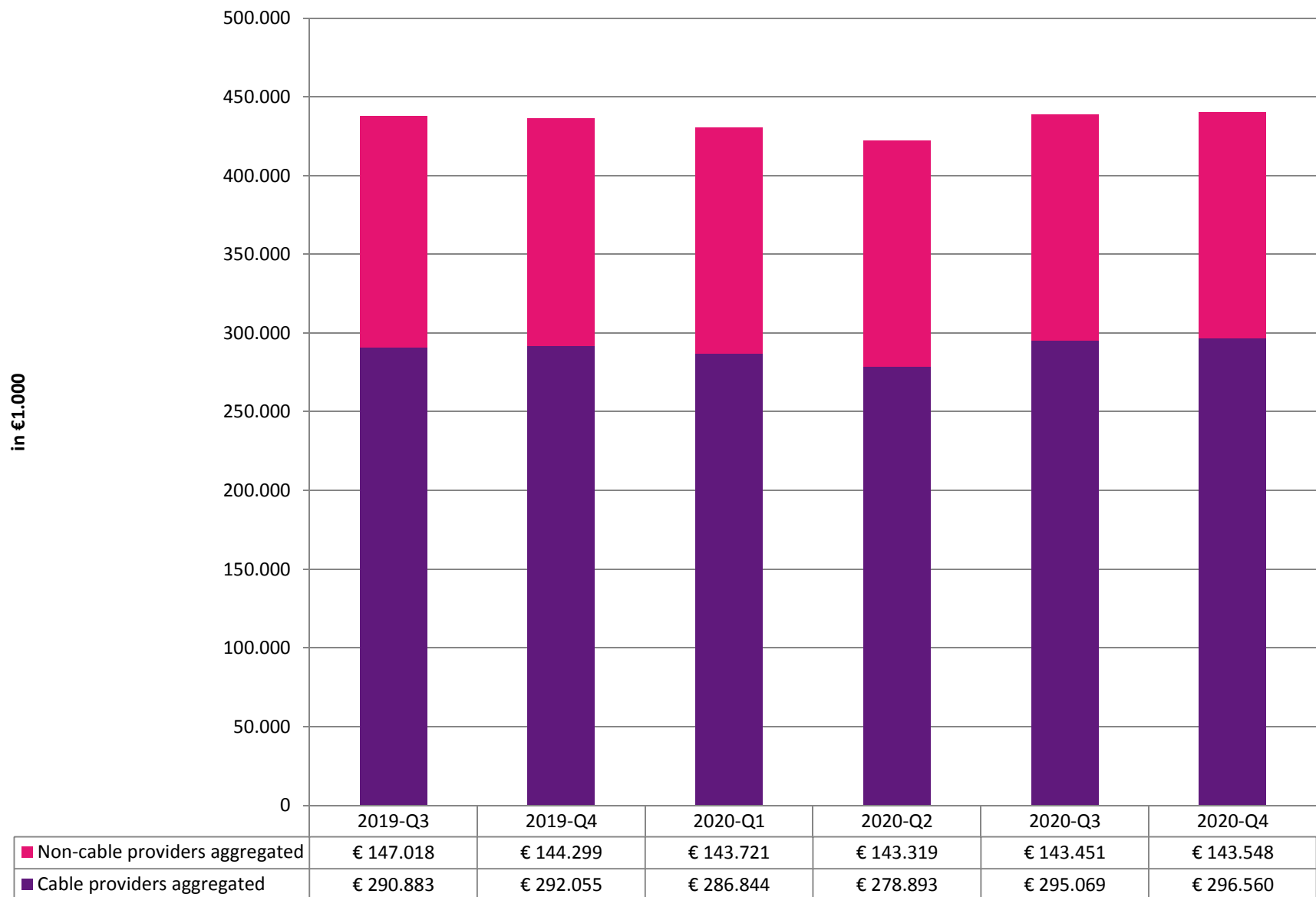
## Retail churn of television subscriptions



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

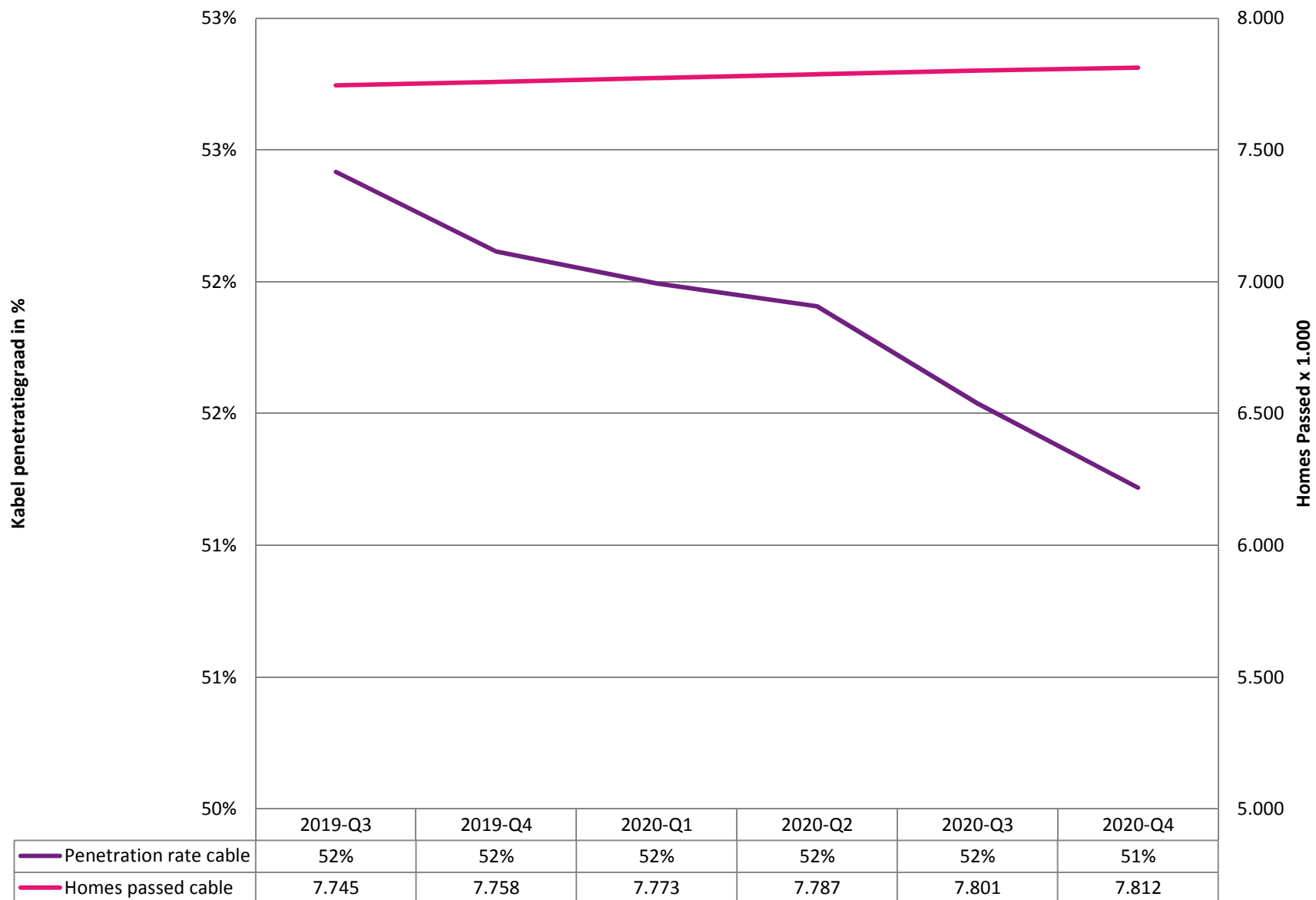
## Retail turnover of radio/tv subscriptions



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

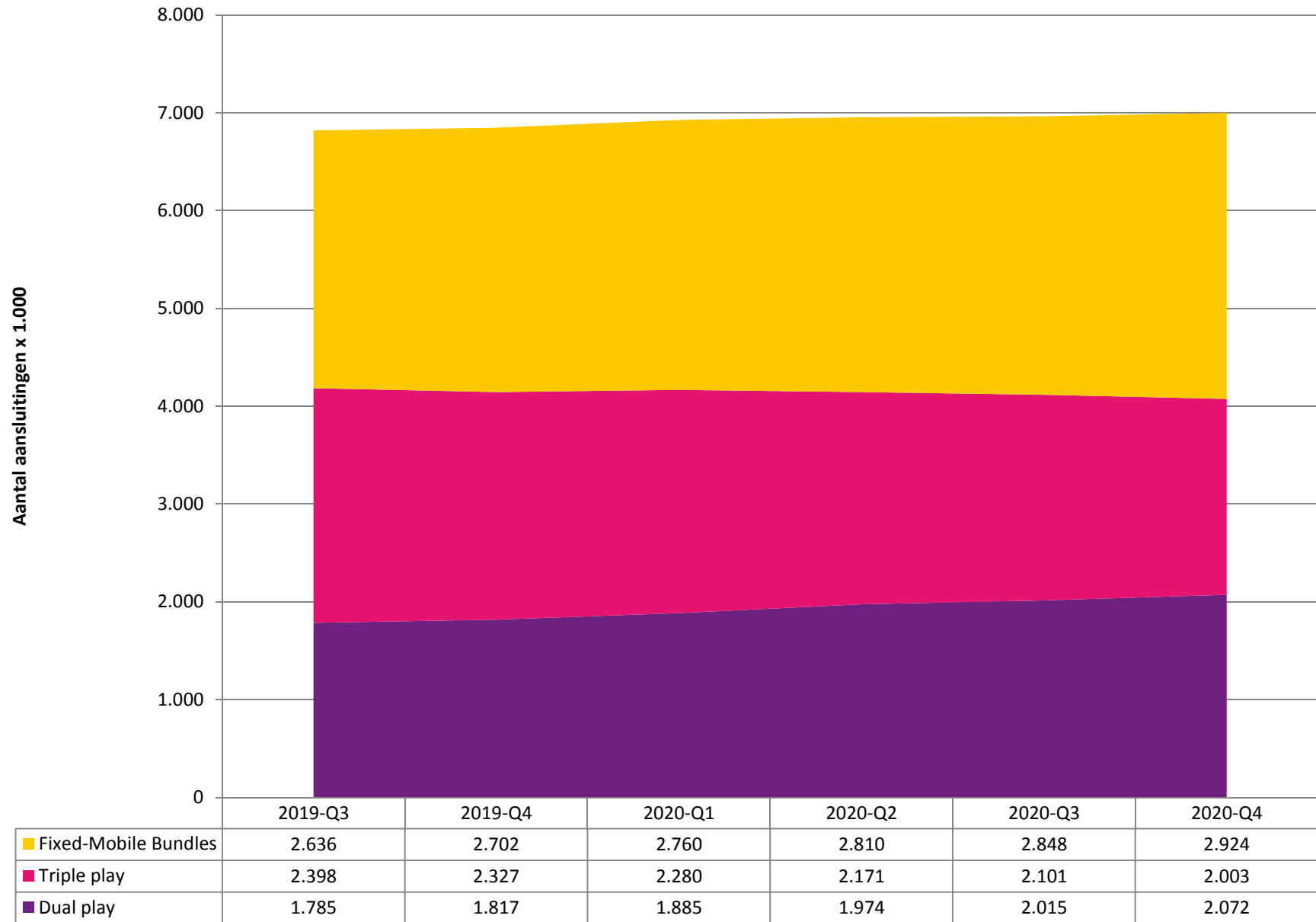
## Homes passed and cable penetration level



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

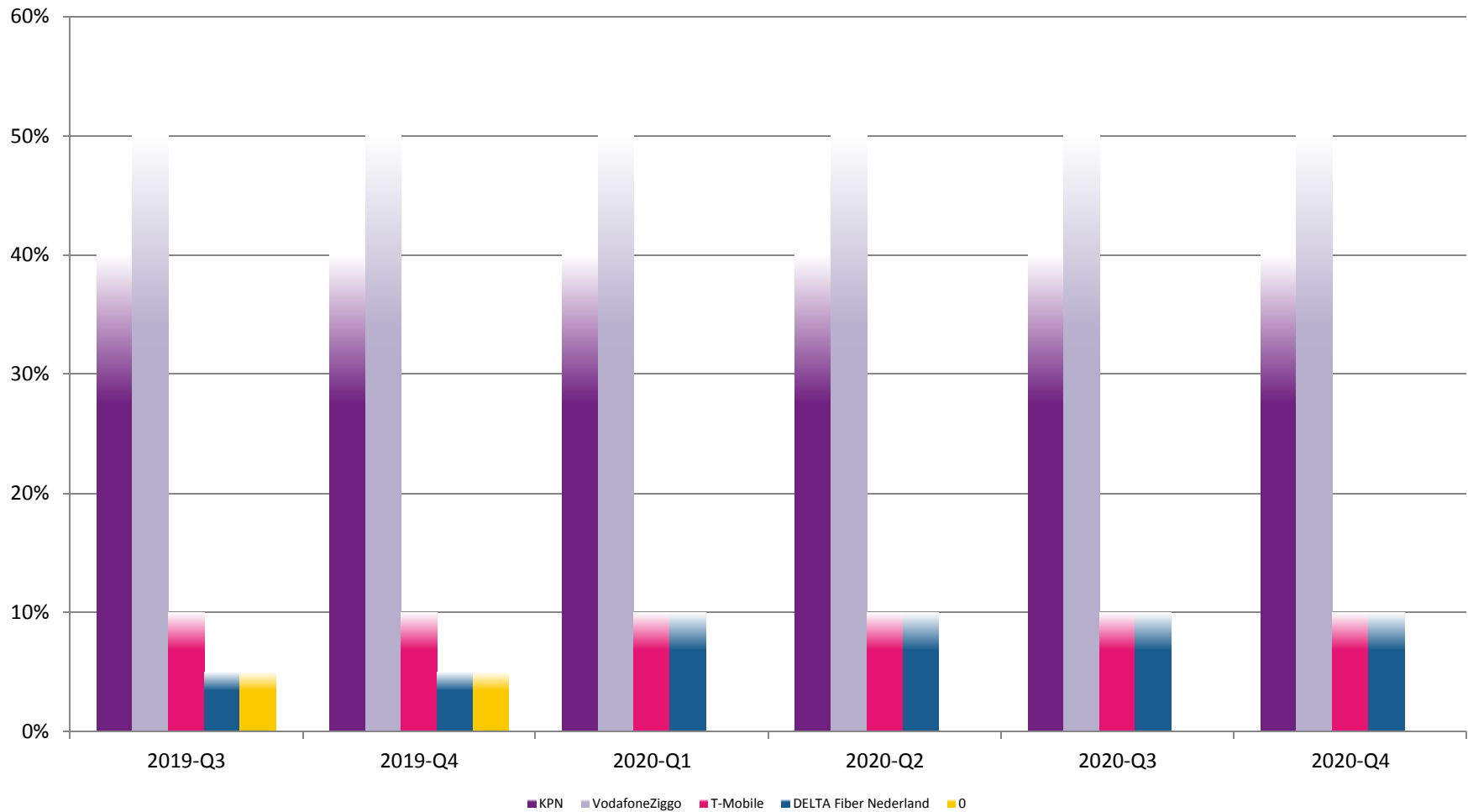


Op basis van vragen 50\_A1\_1\_1-2-3-5-6, 50\_A1\_2\_1-2-3-4, en 50\_A1\_3\_1 van de Telecommonitor

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

# Bundles

## Retail market share of bundles

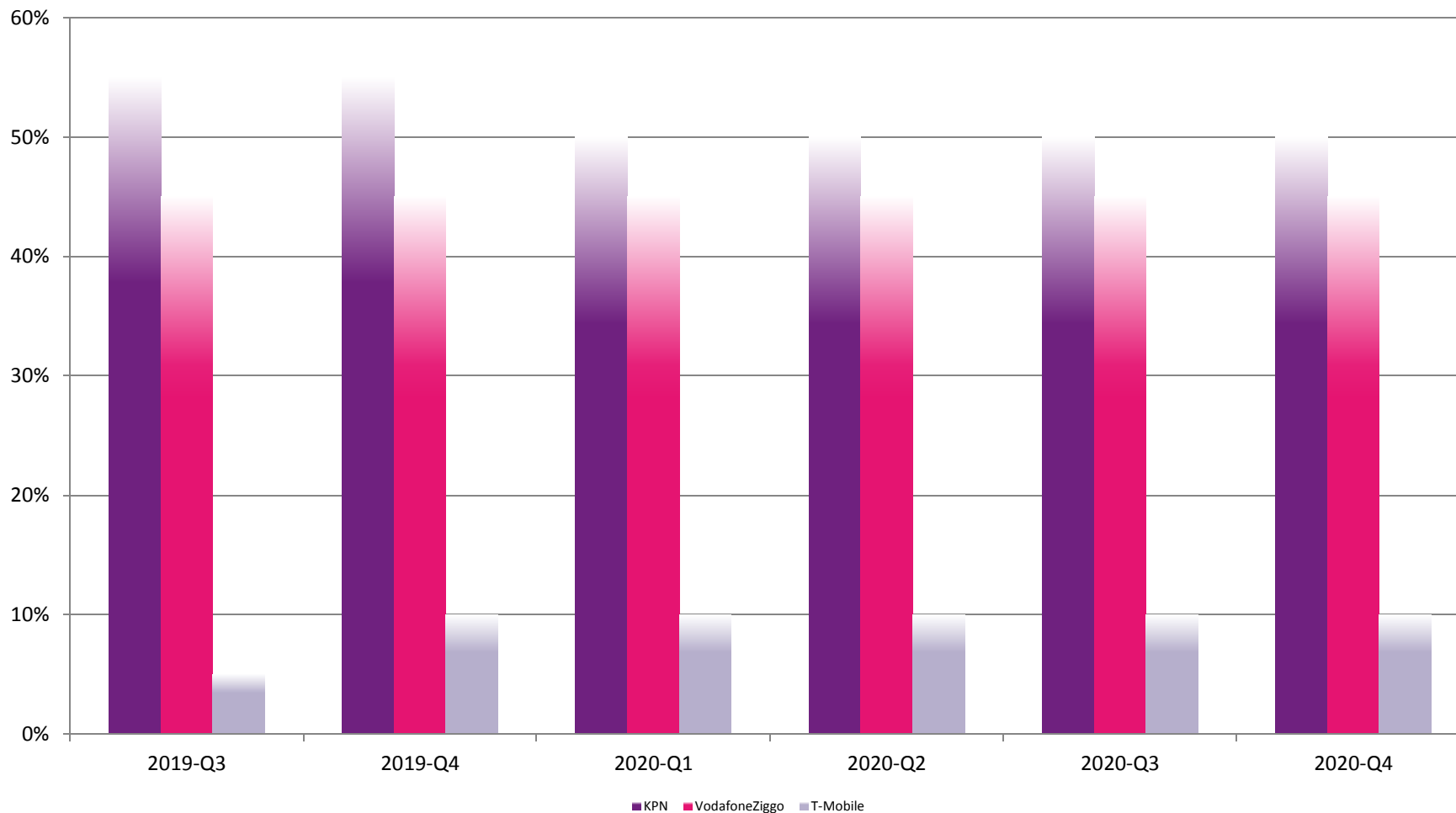


	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3	2020-Q4
KPN	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]
VodafoneZiggo	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
DELTA Fiber Nederland	[0 - 5%]	[0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



	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%

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



# 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
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.

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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