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Telecom Monitor

Q3 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

Third quarter of 2020

Mobile data and voice minutes

In the third quarter of 2020, people in the Netherlands consumed considerably more mobile data than in previous quarters. Data consumption in the third quarter was 264 billion MB, which is an increase of 20 percent compared with the second quarter. One possible explanation for this increase is that, during the summer months, people spent more time outdoors, and thus consumed more mobile data and less wifi.

After an increase in the first six months, the volume of voice minutes over fixed telephony once again dropped to pre-coronavirus-pandemic levels (fourth quarter of 2019). The volume of voice minutes over mobile telephony, too, dropped by 10% compared with the second quarter of 2020.

Broadband connections of households

In total, 7.5 million households have broadband connections. Of those households, over 4 million have a broadband connection of 100 Mbps (Megabit per second) or higher. More and more people have broadband connections based on fiber-optic technology, which comes at the expense of copper-based and cable-based connections. In the third quarter, over 1.5 million households had fiber-optic connections, which was 59,000 more than in the second quarter. Approximately 6 million households have copper connections or fiber-optic connections, which is 22,000 less than in the second quarter.

Market shares of mobile operators

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

Fiber-optic wholesale market

The wholesale market for access (physical or otherwise) to fiber-optic networks that have been built to locations of business end-users continues to grow. This market of so-called 'ODF access' for data traffic between different business parks consisted in the third quarter of 2020 approximately 107,000 connections. Over these FttO connection networks ('Fiber to the Office'), approximately 57,000 lines are offered as retail service to business end-users. Approximately 40 percent of business network services are currently offered over fiber-optic connections.



Remarks and corrections

(Dutch)

Algemeen

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

Mobiel

Ten opzichte van de *Telecommonitor rapportage Q2 2020* zijn er enkele datacorrecties doorgevoerd voor:

- Mobiele retailsluitingen (p. 5)
- Mobiel verbruik van belminuten voor kwartalen Q1 en Q2 2020 (p. 9, p. 11)

Zakelijke netwerkdiensten

Datacorrecties voor retail zakelijke glasaansluitingen (p. 36):

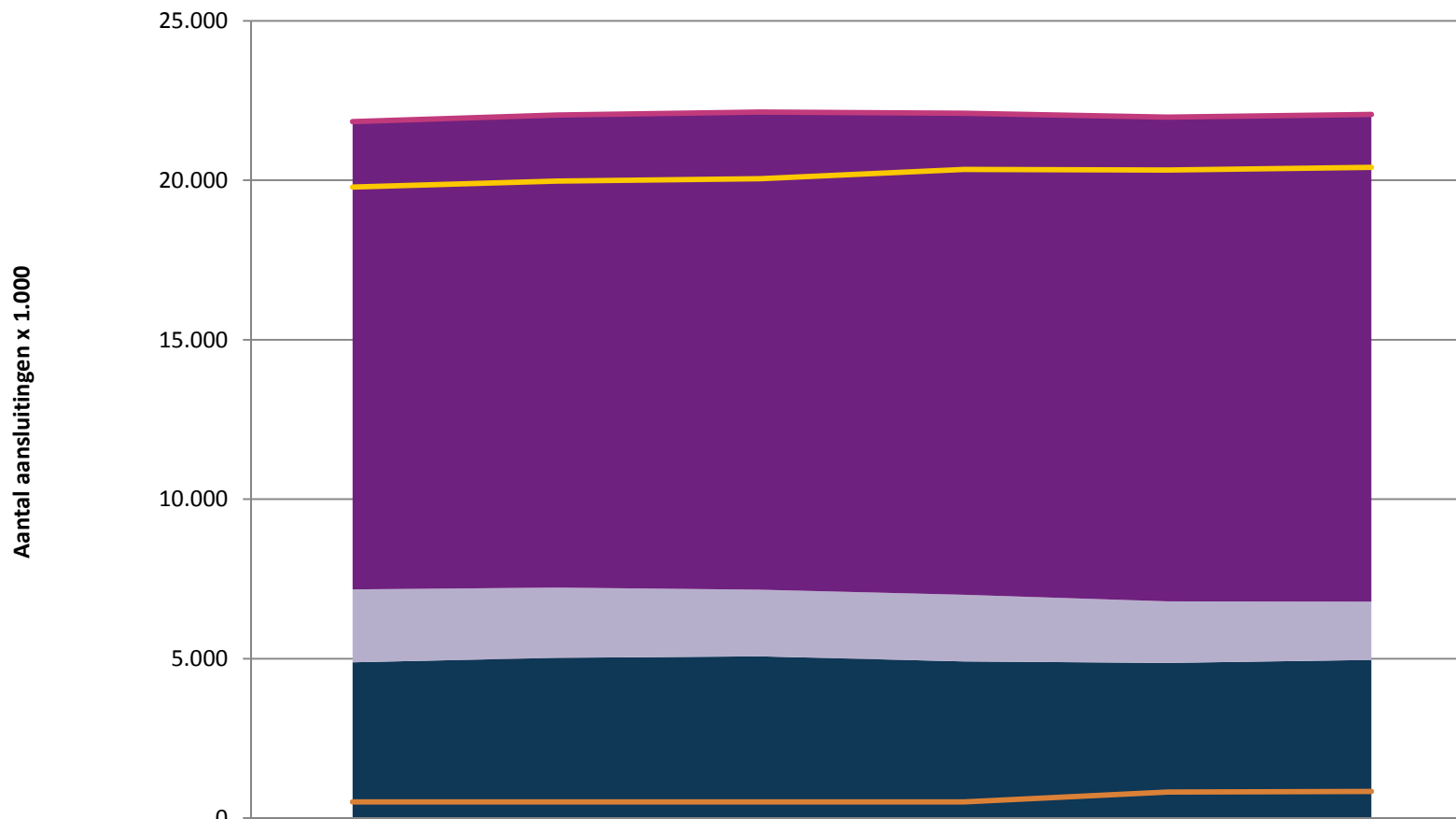
- 2019-Q1: was 54.427, correctie 53.685
- 2020-Q2: was 56.974, correctie 56.998

Datacorrecties voor wholesale zakelijke glasaansluitingen (p. 38):

- 2019-Q1: was 94.406, correctie 97.601
- 2019-Q2: was 95.239, correctie 99.315
- 2019-Q3: was 95.997, correctie 99.840
- 2019-Q4: was 98.689, correctie 102.738
- 2020-Q2: was 107.048, correctie 106.799

Mobile

Retail connections

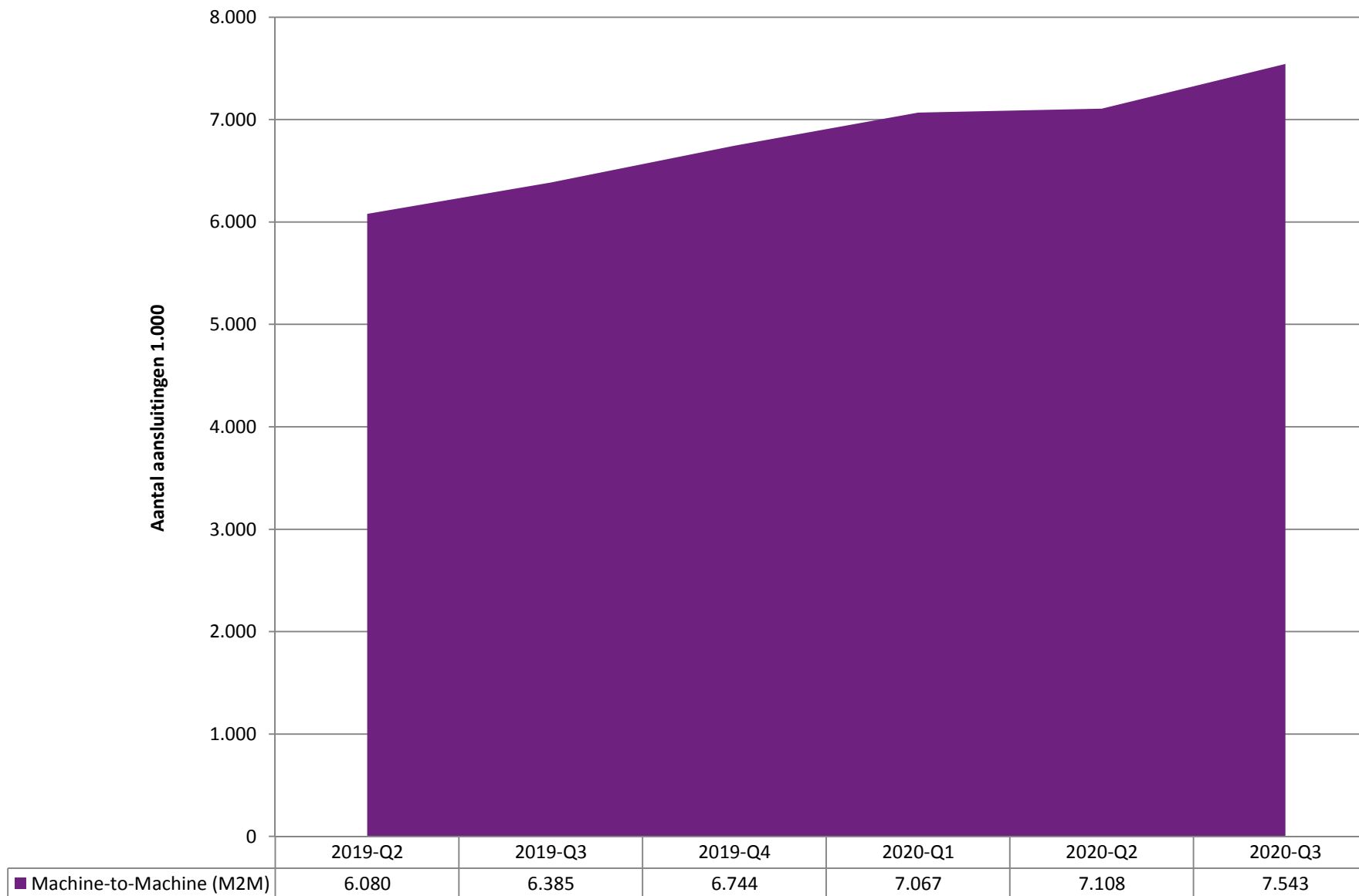


	2019-Q2	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3
Postpaid MNO	14.671	14.818	14.975	15.097	15.186	15.273
Prepaid MNO	2.288	2.205	2.093	2.095	1.932	1.825
Postpaid and prepaid MVNO	4.882	5.022	5.070	4.910	4.862	4.962
Total mobile connections	21.841	22.045	22.138	22.102	21.979	22.059
Of which bundled (data and speech)	19.786	19.974	20.051	20.333	20.323	20.403
Of which data only connections	504	509	505	512	821	832

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

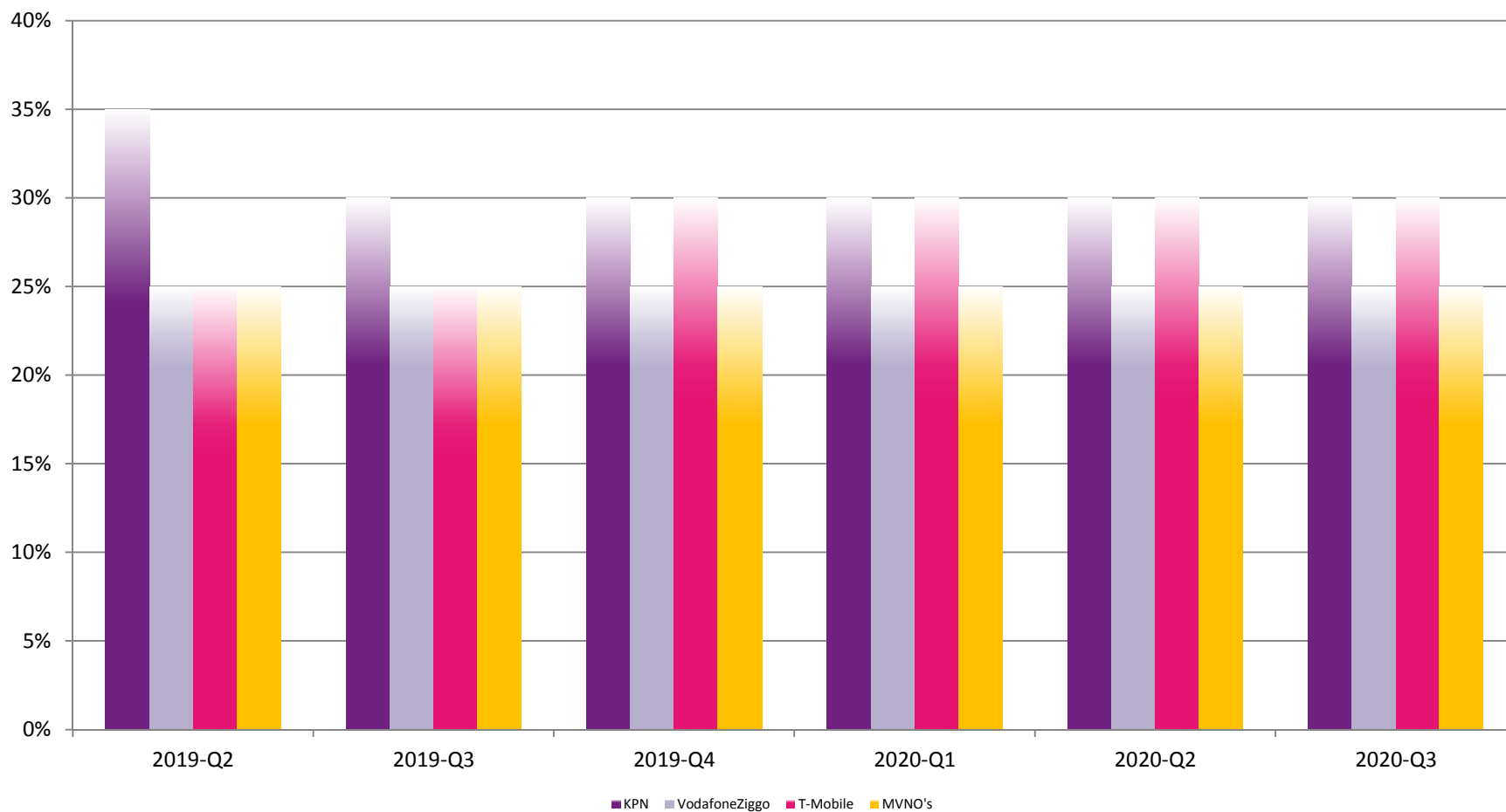
Machine-to-Machine connections



Op basis van vragen 10_A1_4_1 van de Telecommonitor

Mobile

Retail market share based on connections

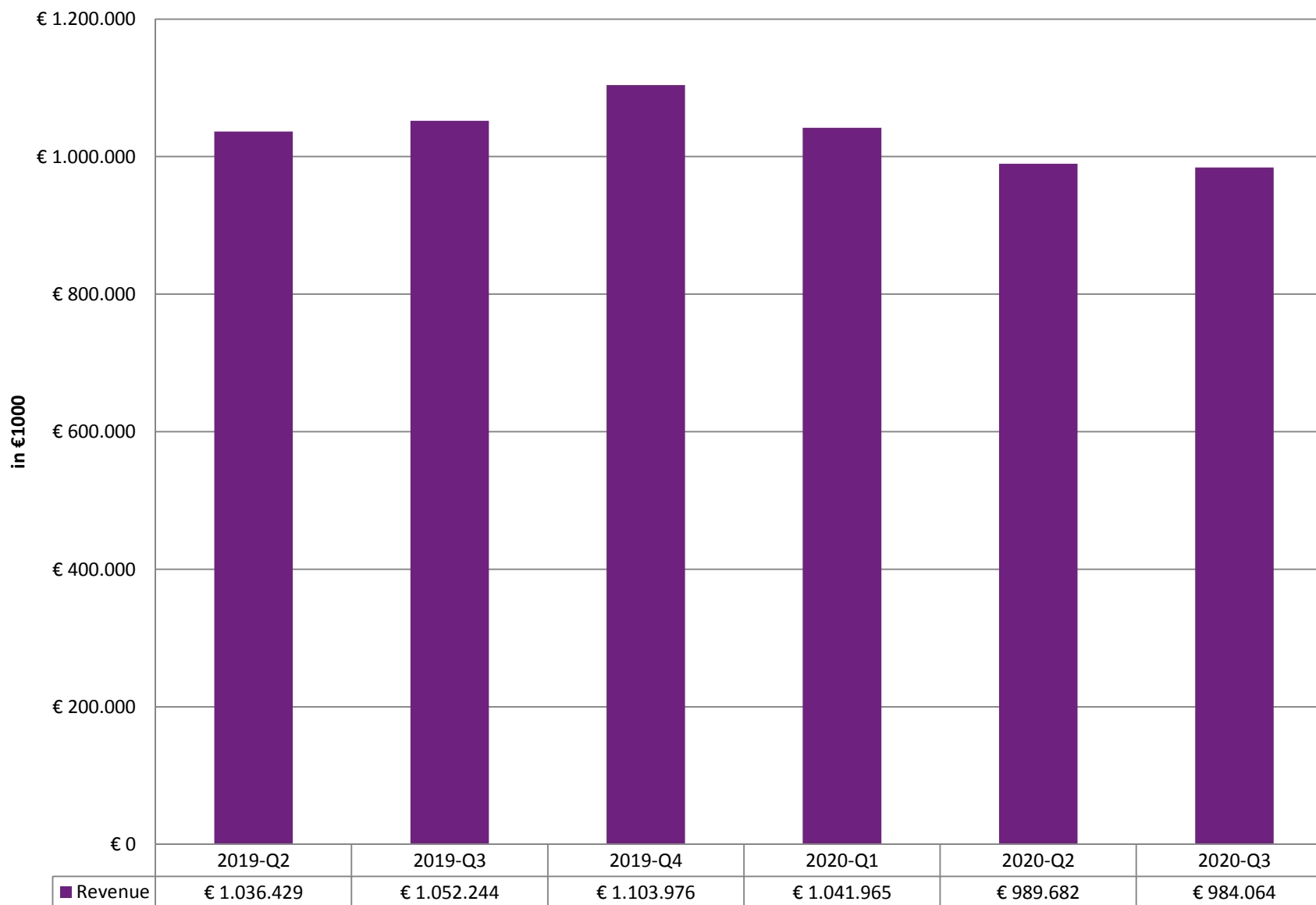


	2019-Q2	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3
KPN	[30 - 35%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
VodafoneZiggo	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]
T-Mobile	[20 - 25%]	[20 - 25%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
MVNO's	[20 - 25%]	[20 - 25%]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

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

Mobile

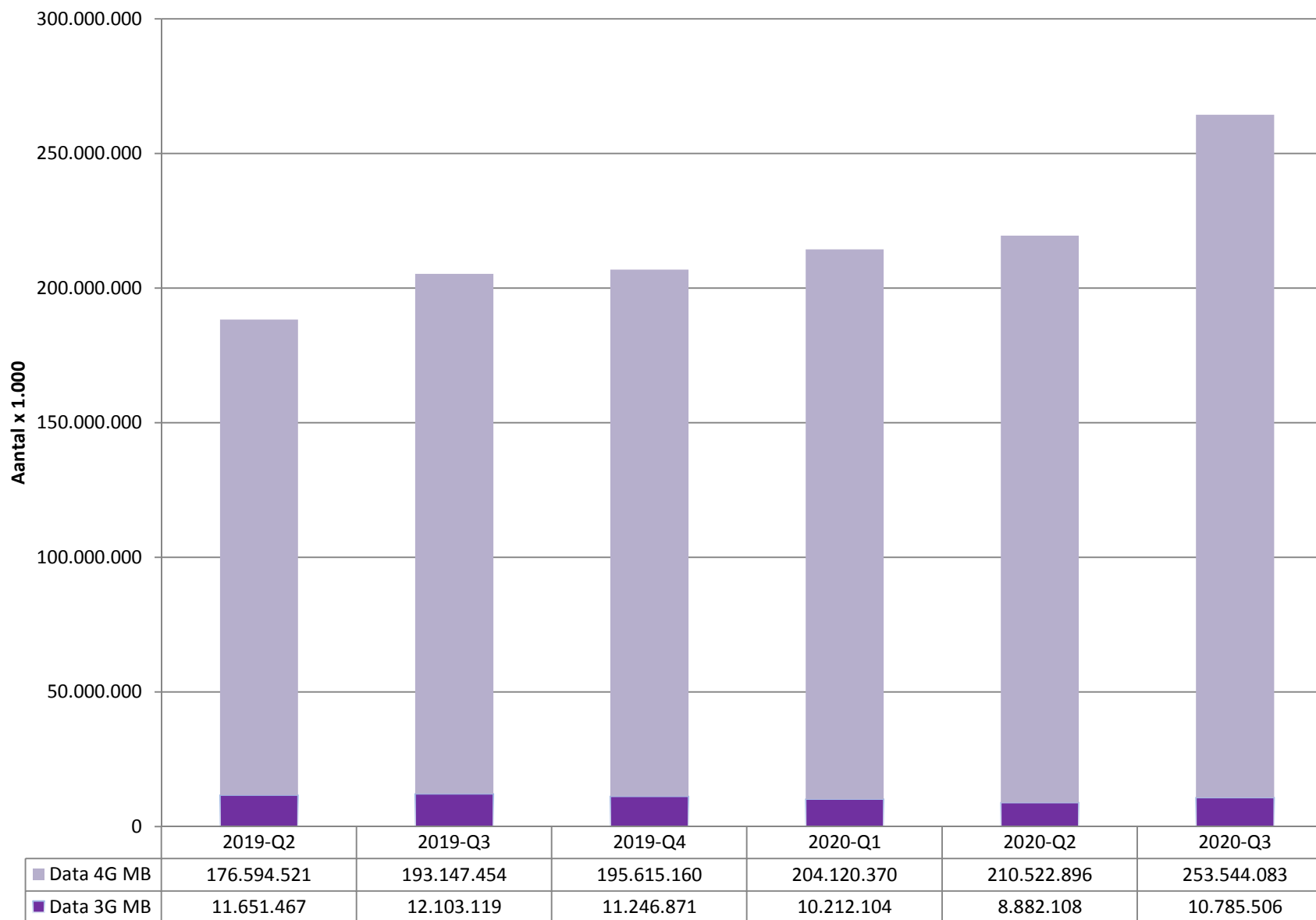
Retail revenue of Mobile Network Operators (MNOs)



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

Mobile

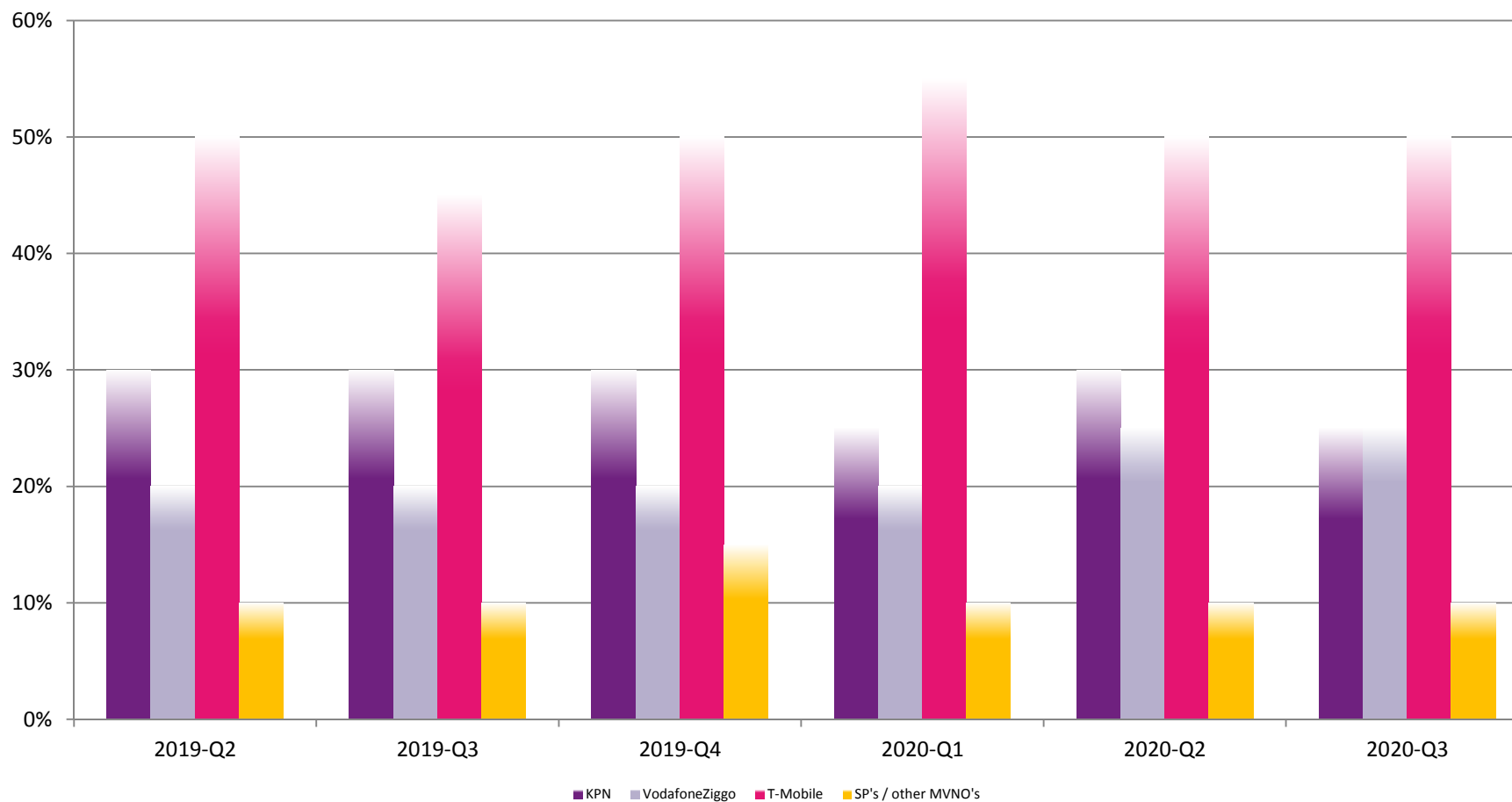
Retail volume 3G/4G data



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

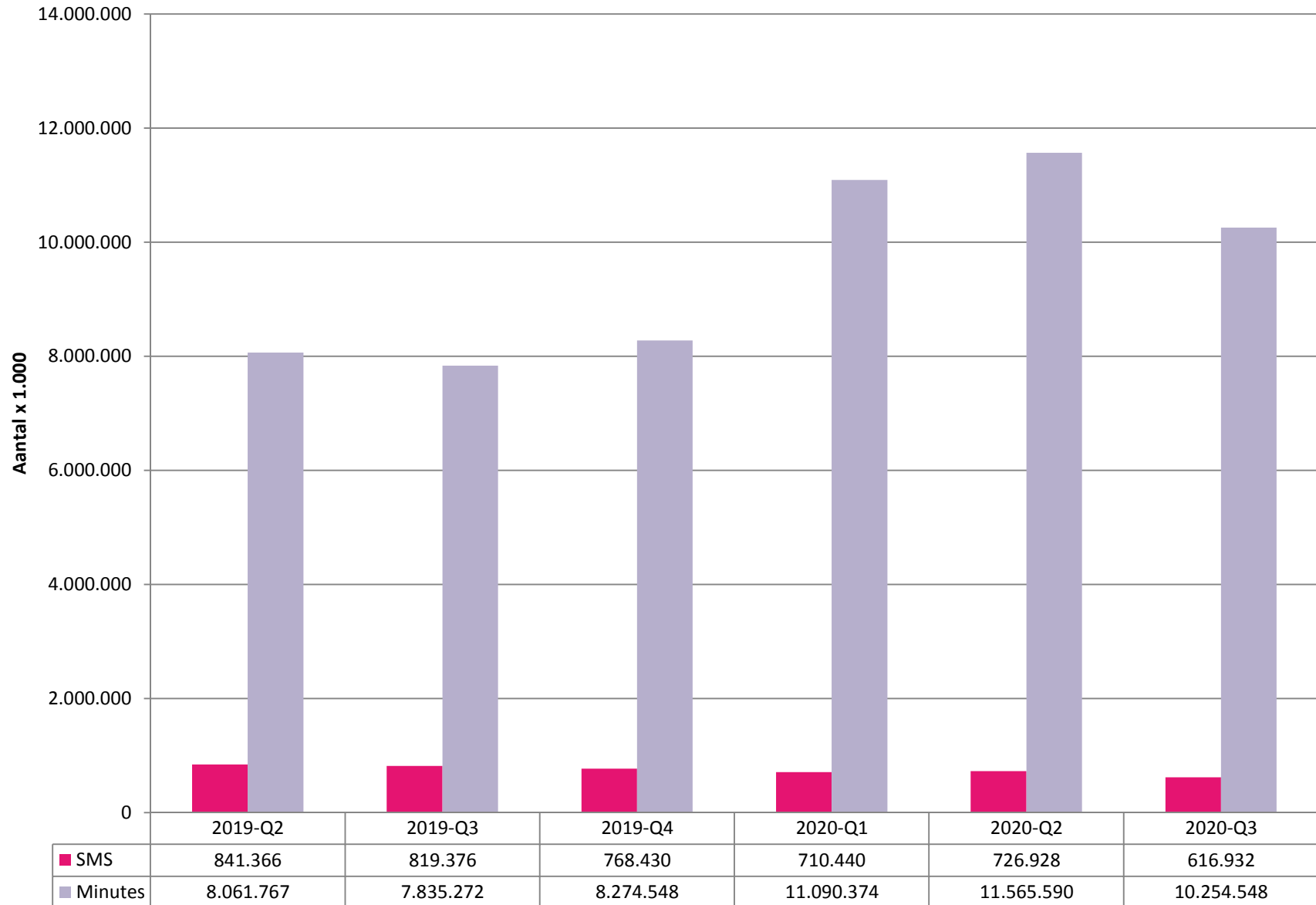
Retail market share based on data consumption



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

Mobile

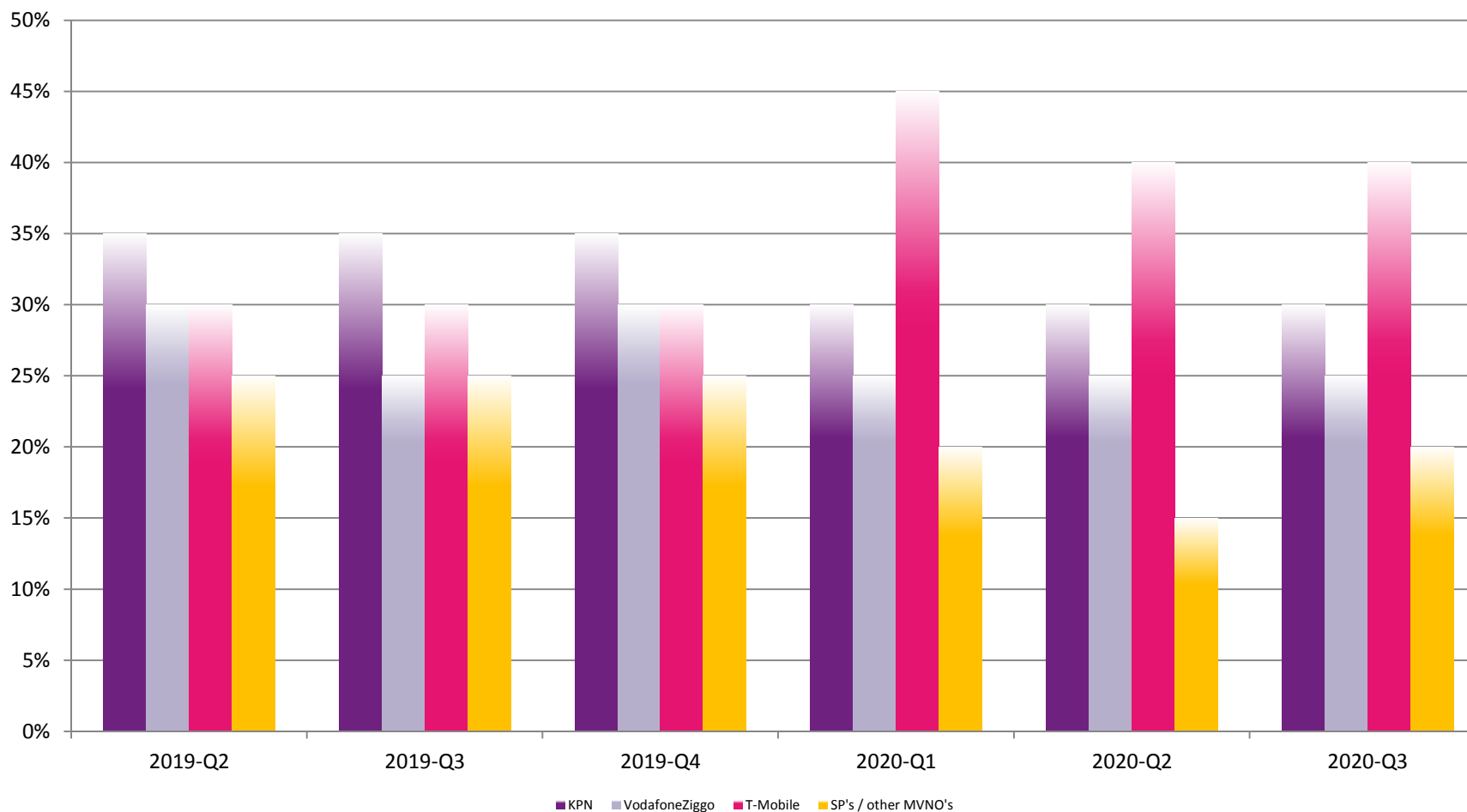
Retail volume of voice minutes and SMS/text



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

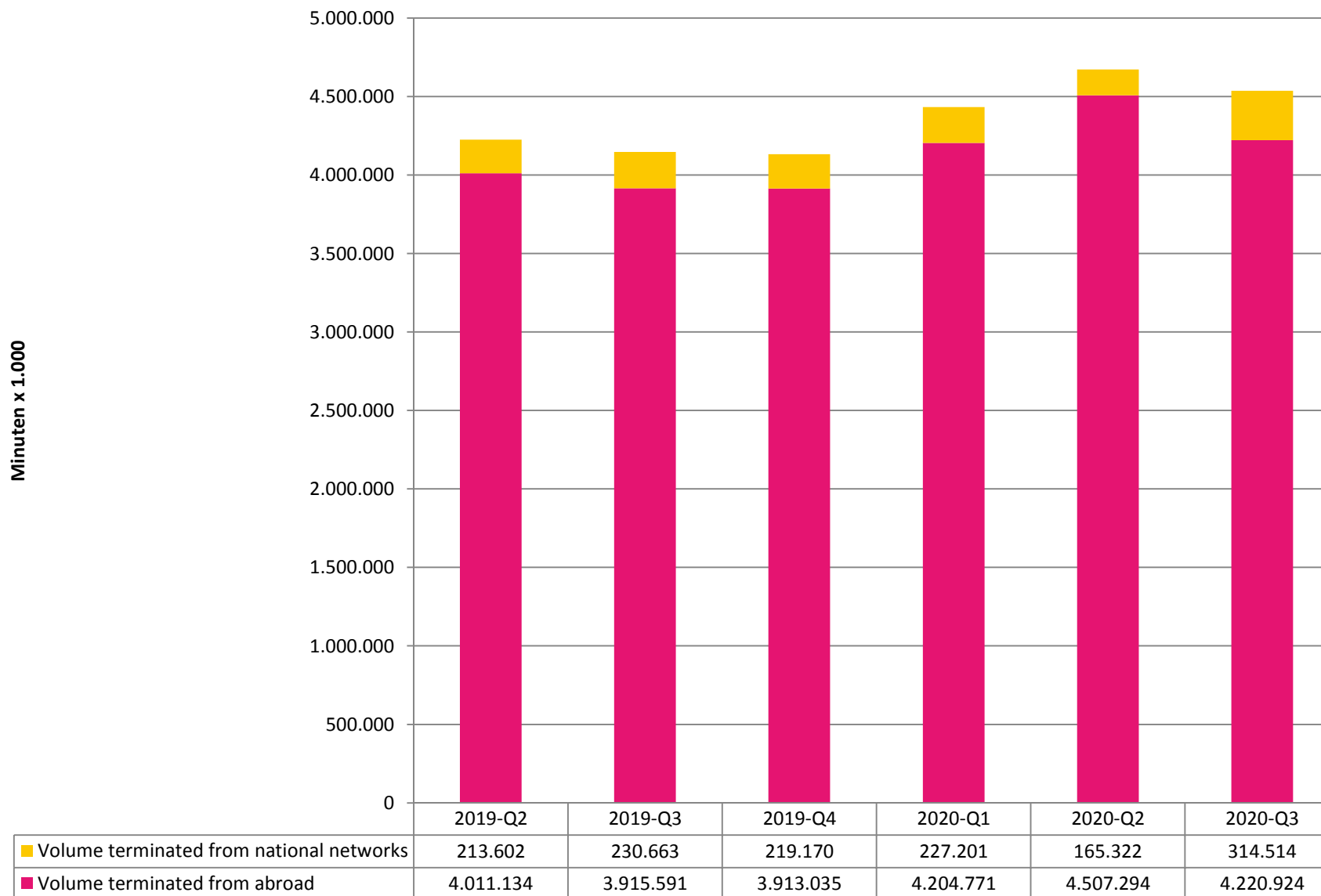


	2019-Q2	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3
KPN	[30 - 35%]	[30 - 35%]	[30 - 35%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
VodafoneZiggo	[25 - 30%]	[20 - 25%]	[25 - 30%]	[20 - 25%]	[20 - 25%]	[20 - 25%]
T-Mobile	[25 - 30%]	[25 - 30%]	[25 - 30%]	[40 - 45%]	[35 - 40%]	[35 - 40%]
SP's / other MVNO's	[20 - 25%]	[20 - 25%]	[20 - 25%]	[15 - 20%]	[10 - 15%]	[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

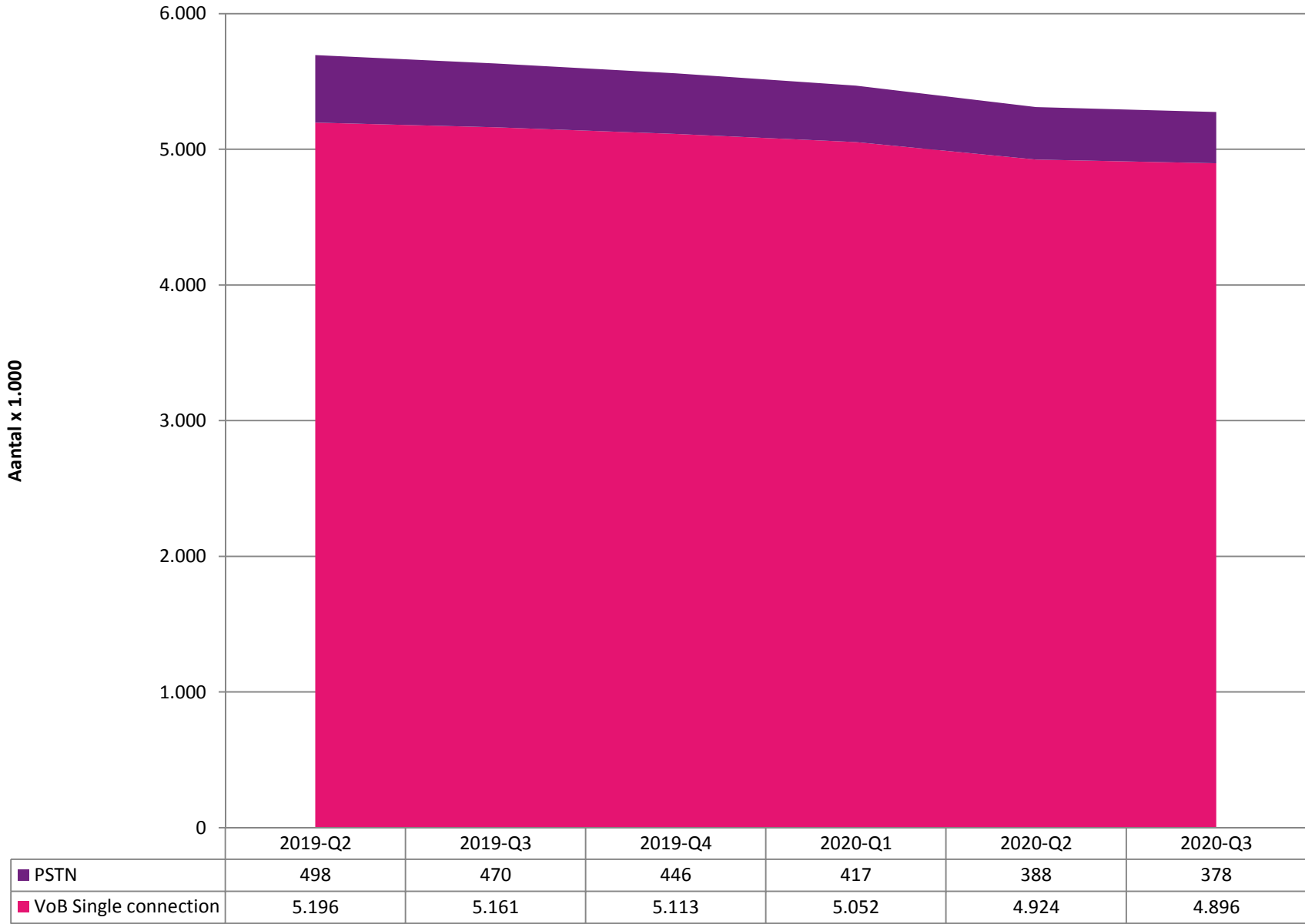
Wholesale volume of call termination (excluding onnet)



Op basis van vragen 10_C2_1-1-2-3-4-5 van de Telecommonitor

Fixed telephony

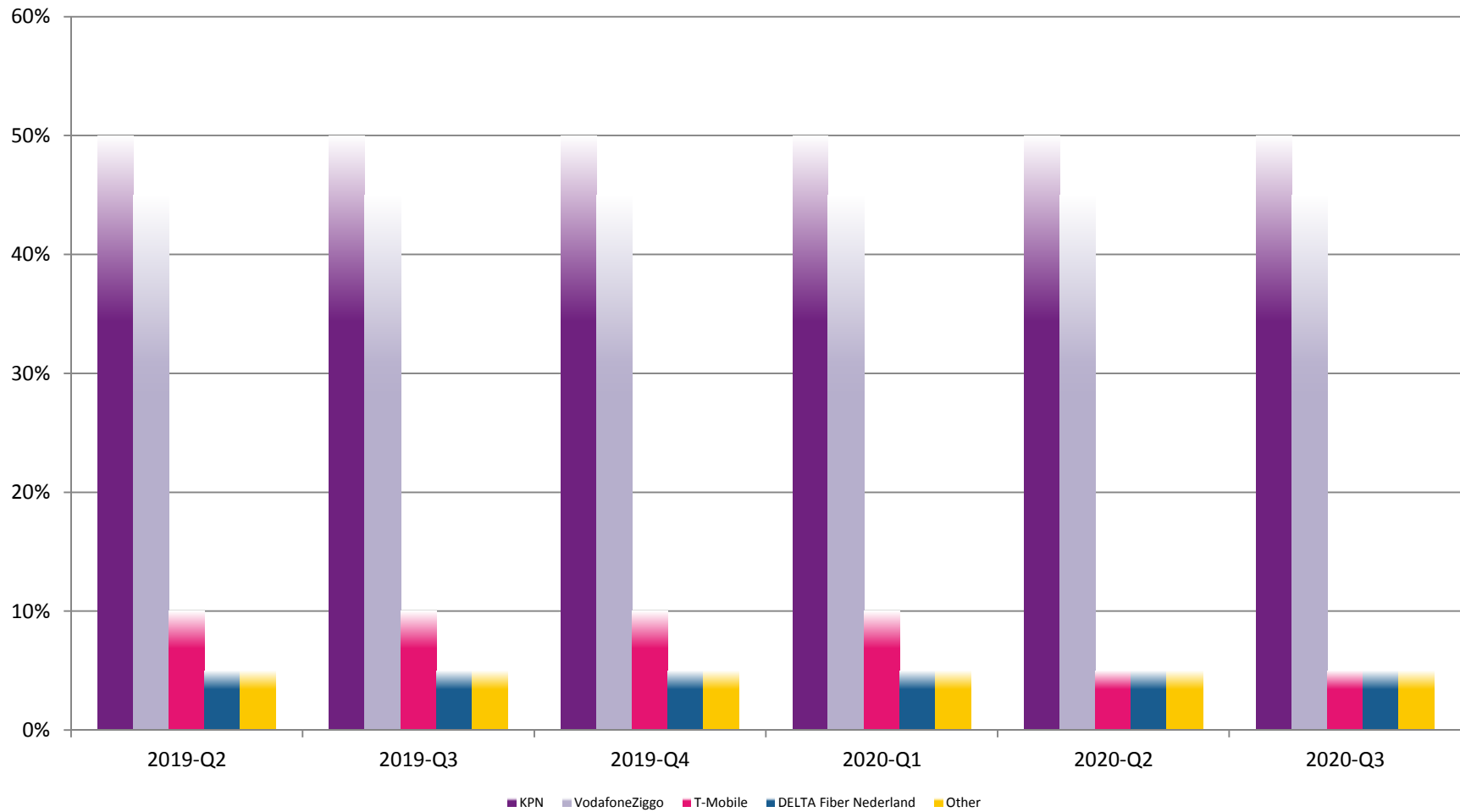
Retail single connections



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

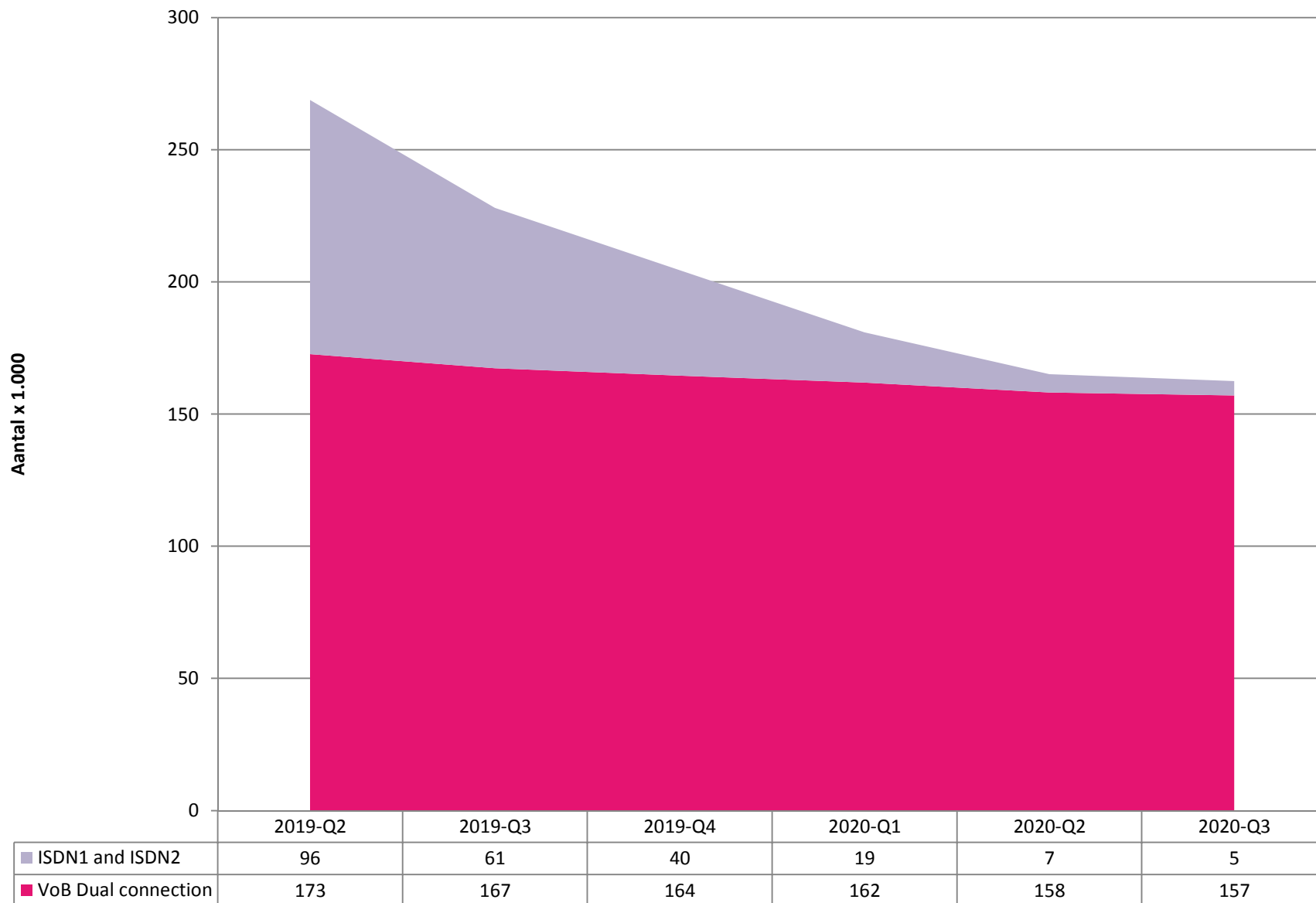
Retail turnover PSTN and VoB



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

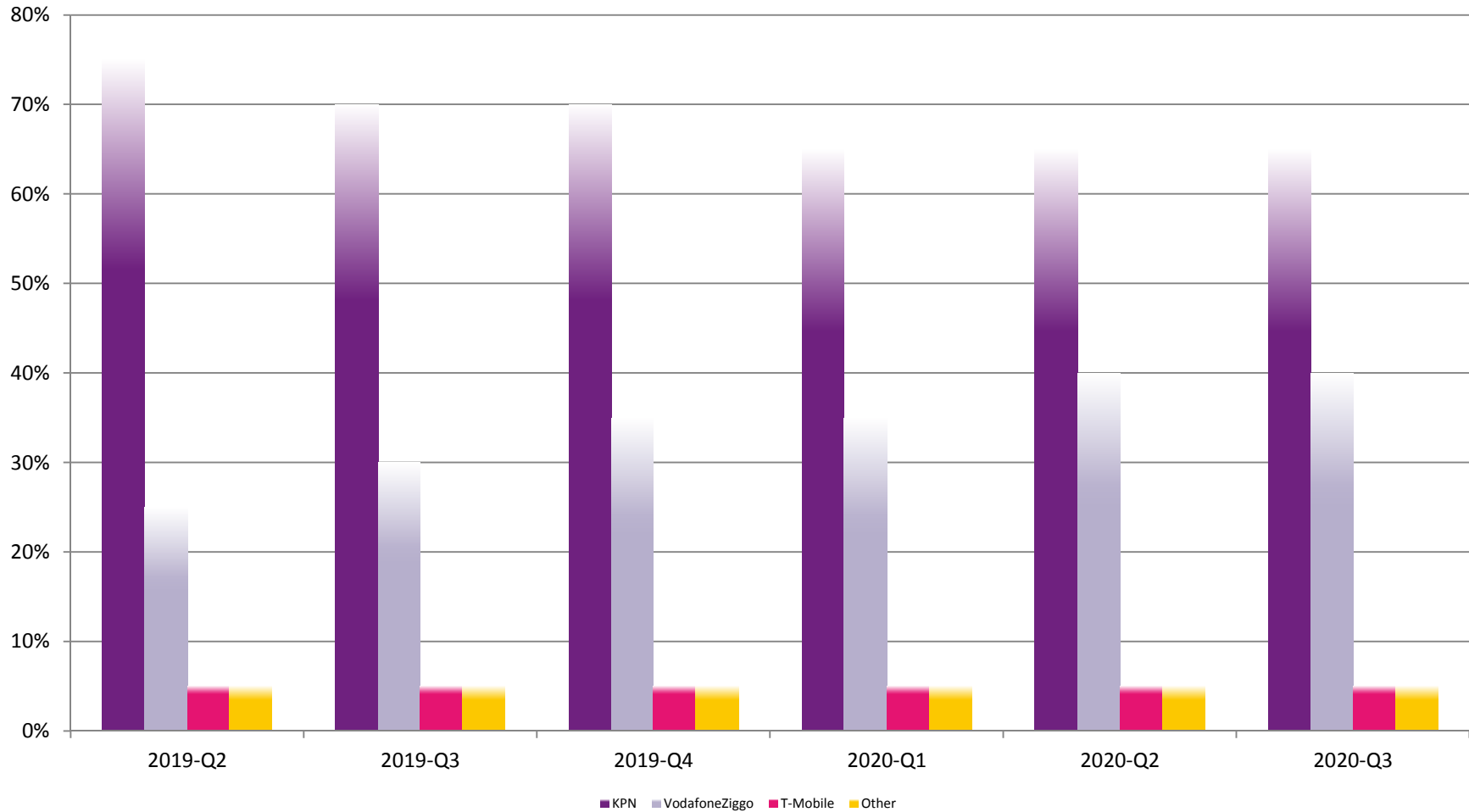
Retail dual connections



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

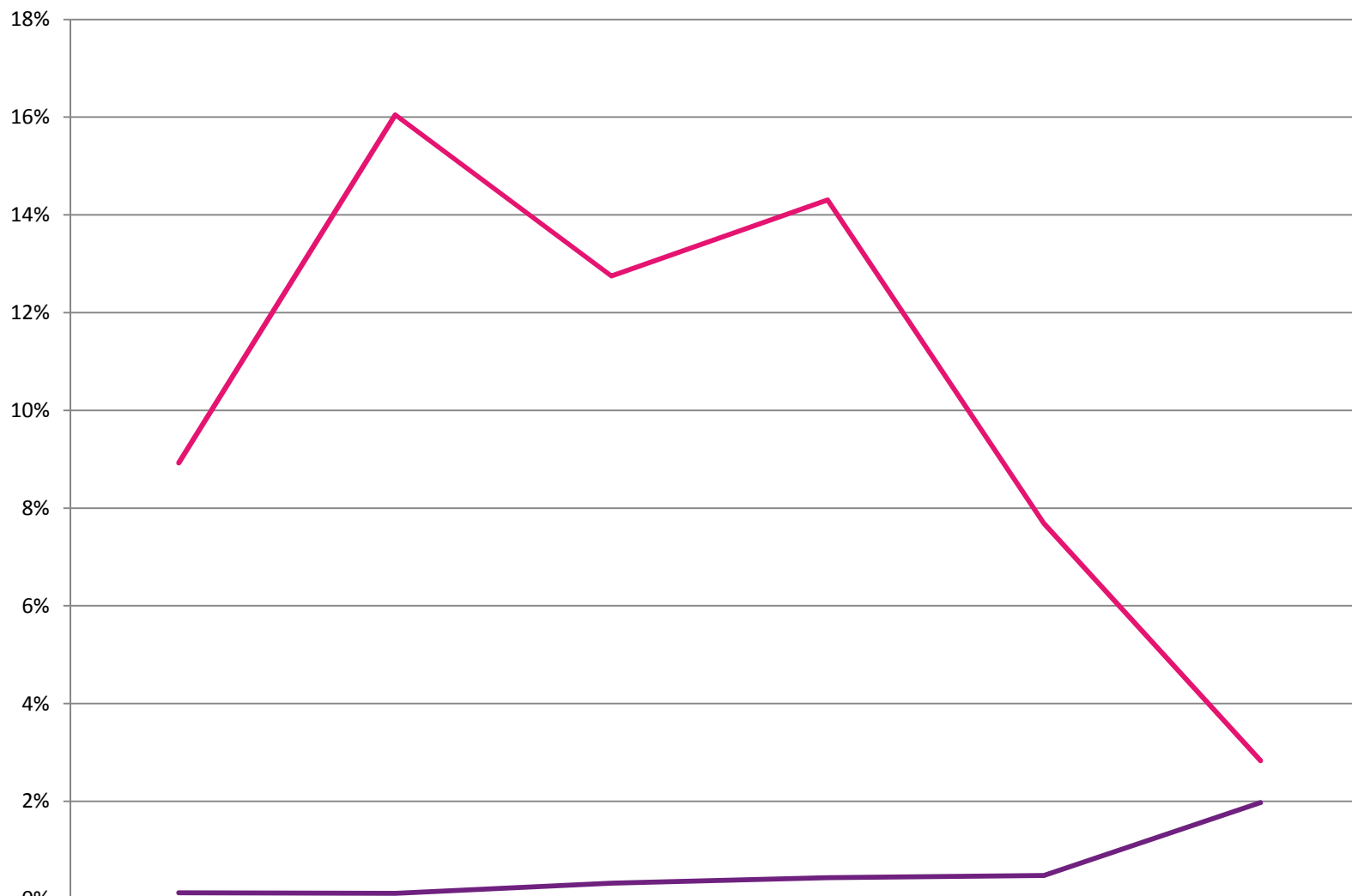


	2019-Q2	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3
KPN	[70 - 75%]	[65 - 70%]	[65 - 70%]	[60 - 65%]	[60 - 65%]	[60 - 65%]
VodafoneZiggo	[20 - 25%]	[25 - 30%]	[30 - 35%]	[30 - 35%]	[35 - 40%]	[35 - 40%]
T-Mobile	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
Other	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]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

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

Fixed telephony

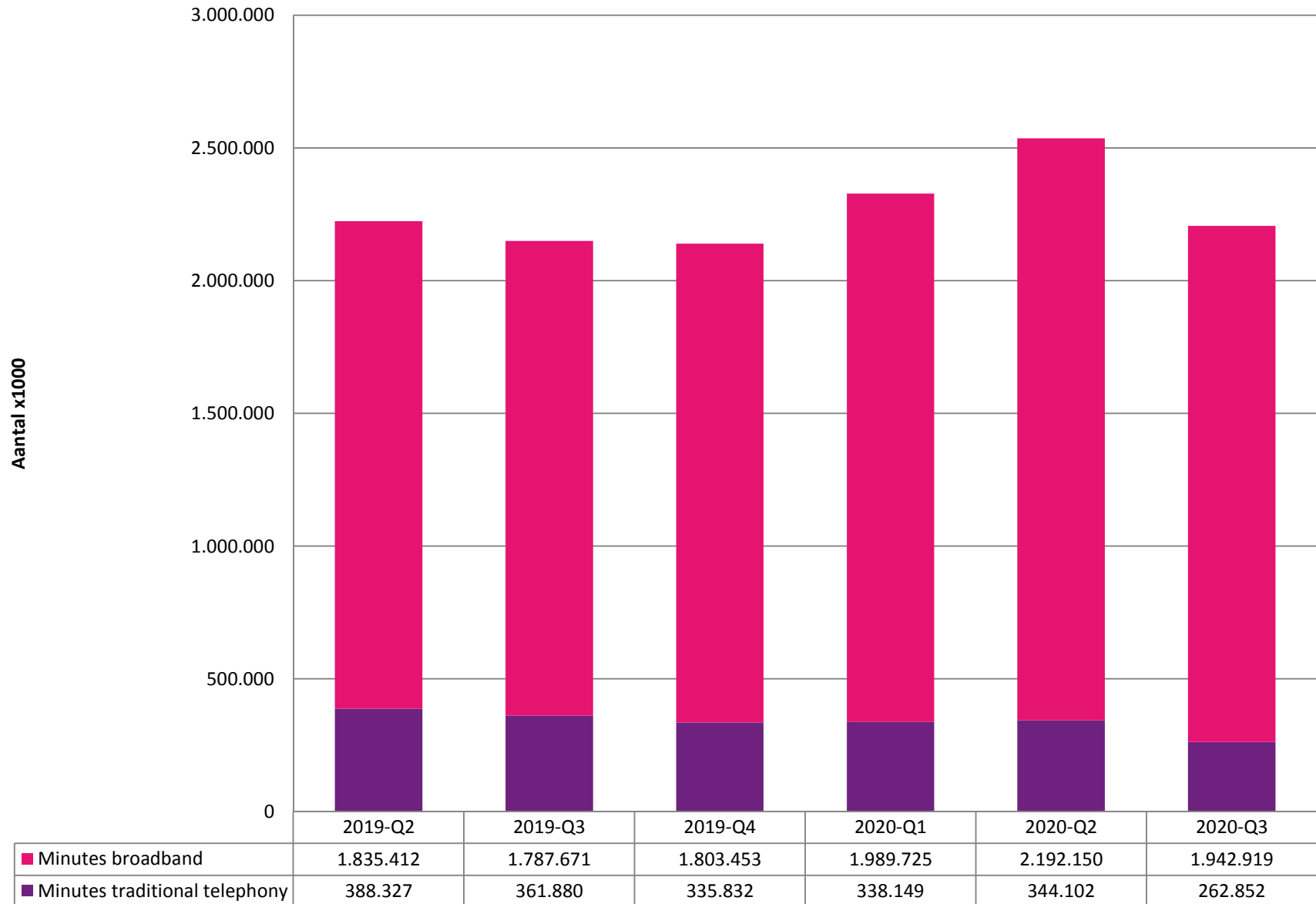
Retail churn of dual connections



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

Fixed telephony

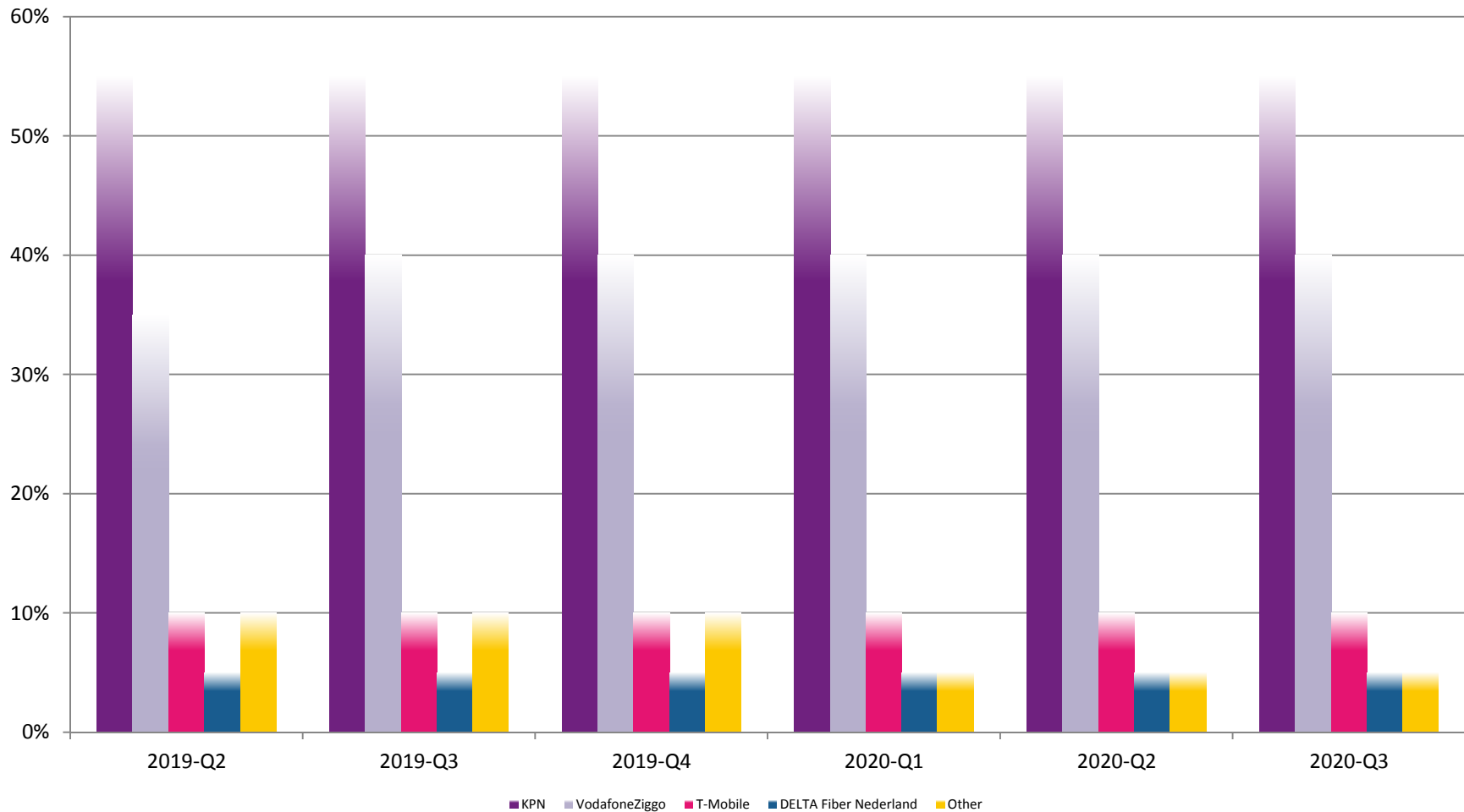
Retail volume based on voice minutes



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

Fixed telephony

Retail market share based on voice minutes

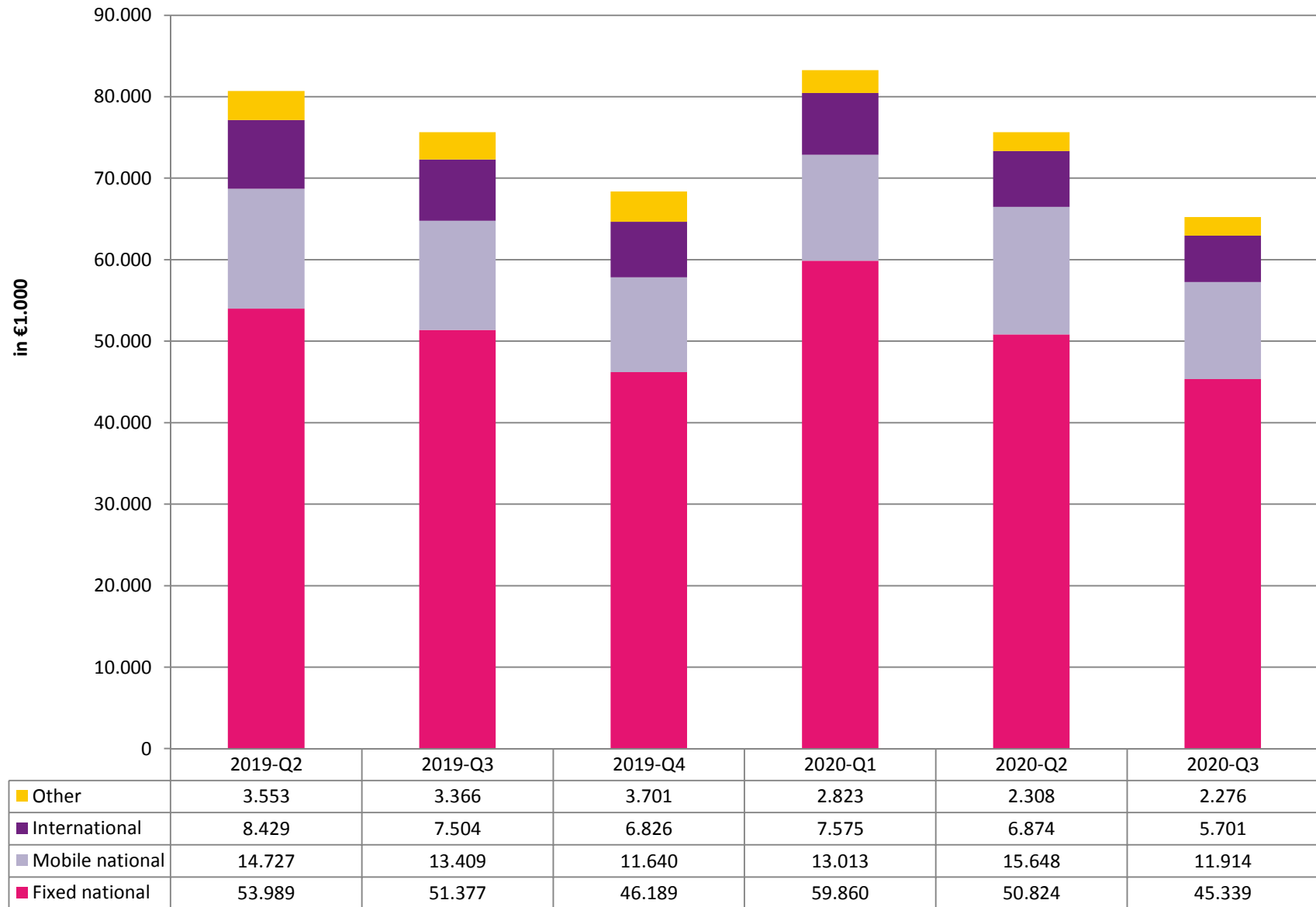


	2019-Q2	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3
KPN	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]
VodafoneZiggo	[30 - 35%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
DELTA Fiber Nederland	[0 - 5%]	[0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

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

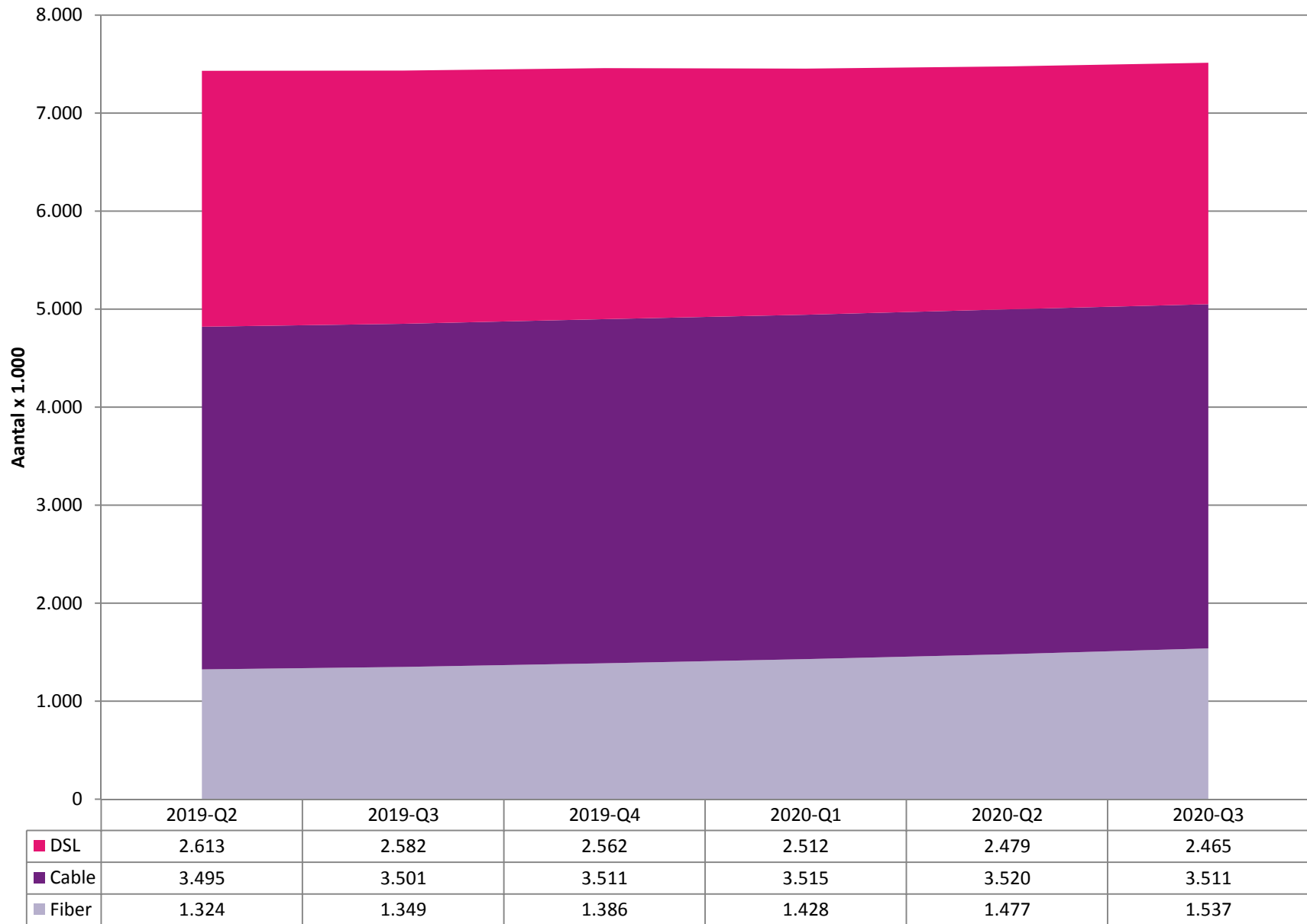
Fixed telephony

Retail turnover per type of traffic



Broadband

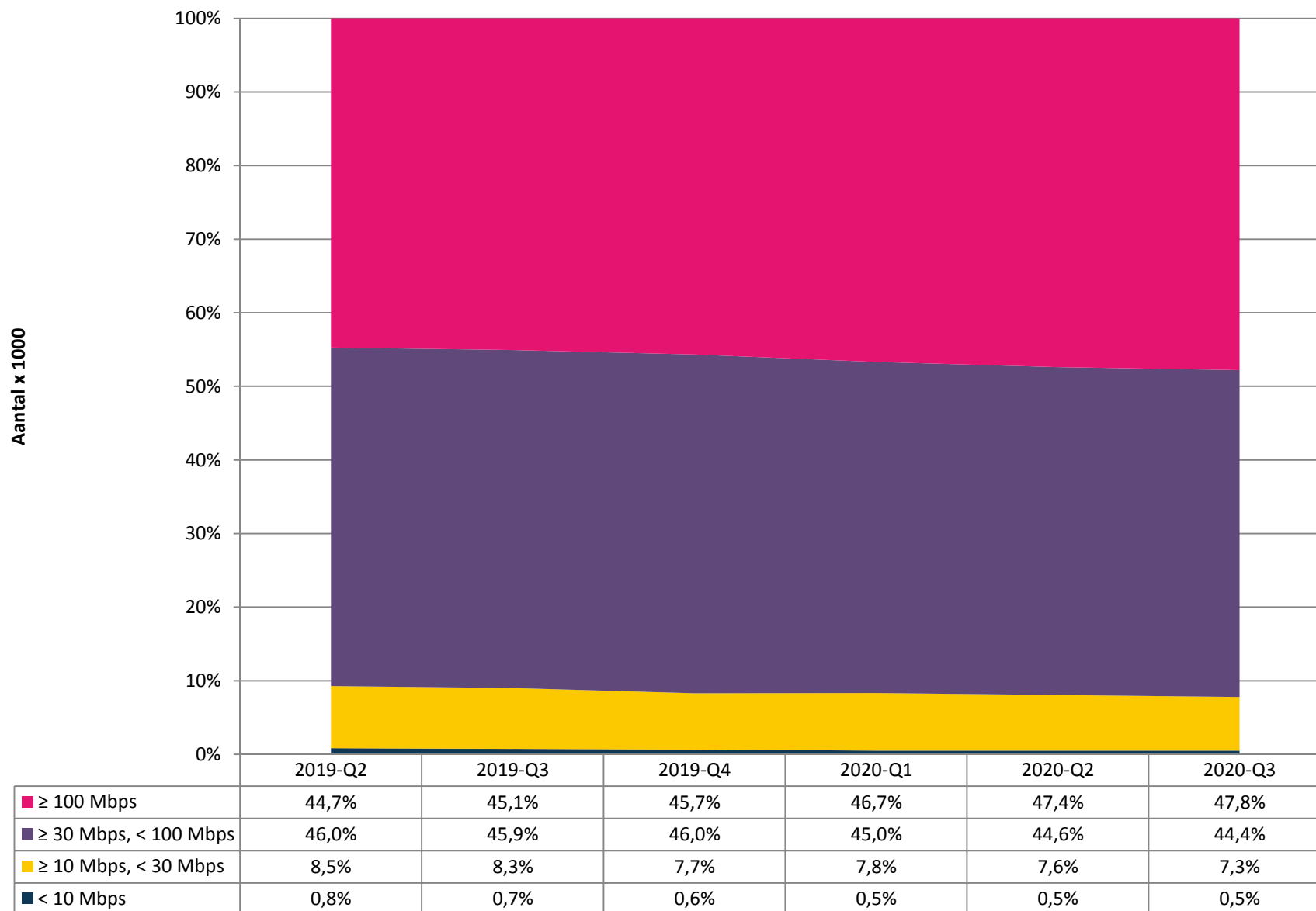
Retail connections per type



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

Broadband

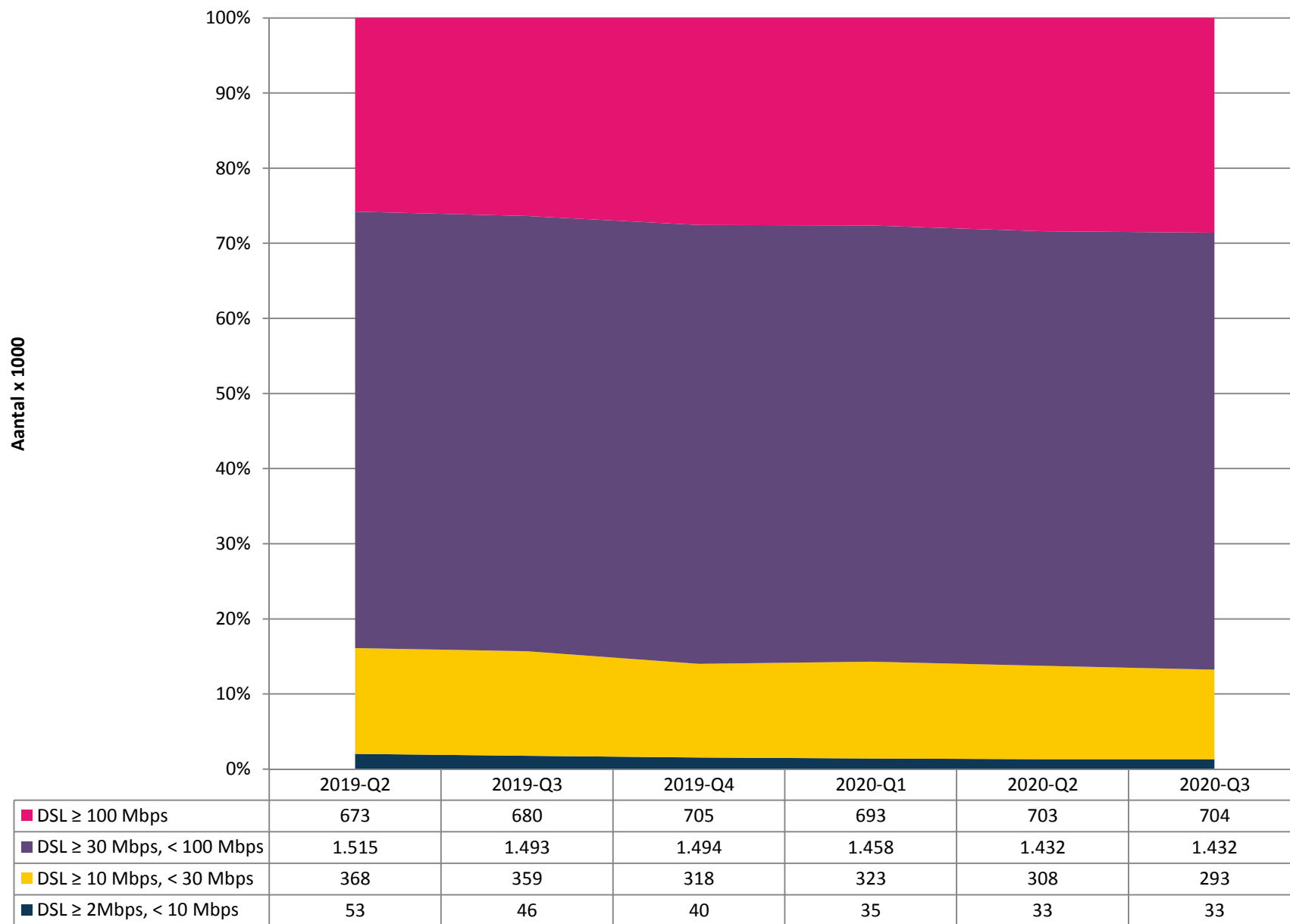
Percentage retail connections by speed



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

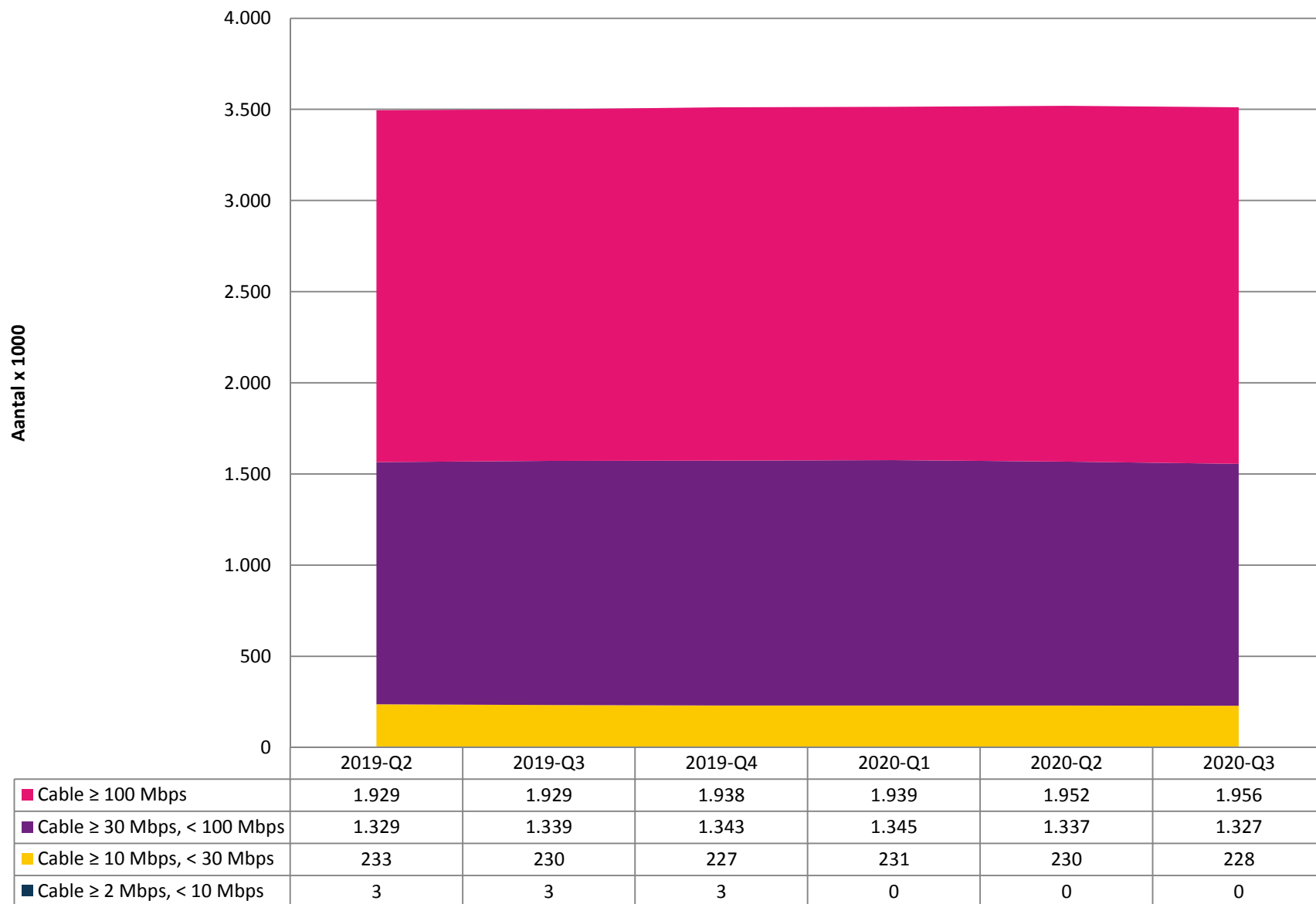
Retail DSL-connections by speed



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

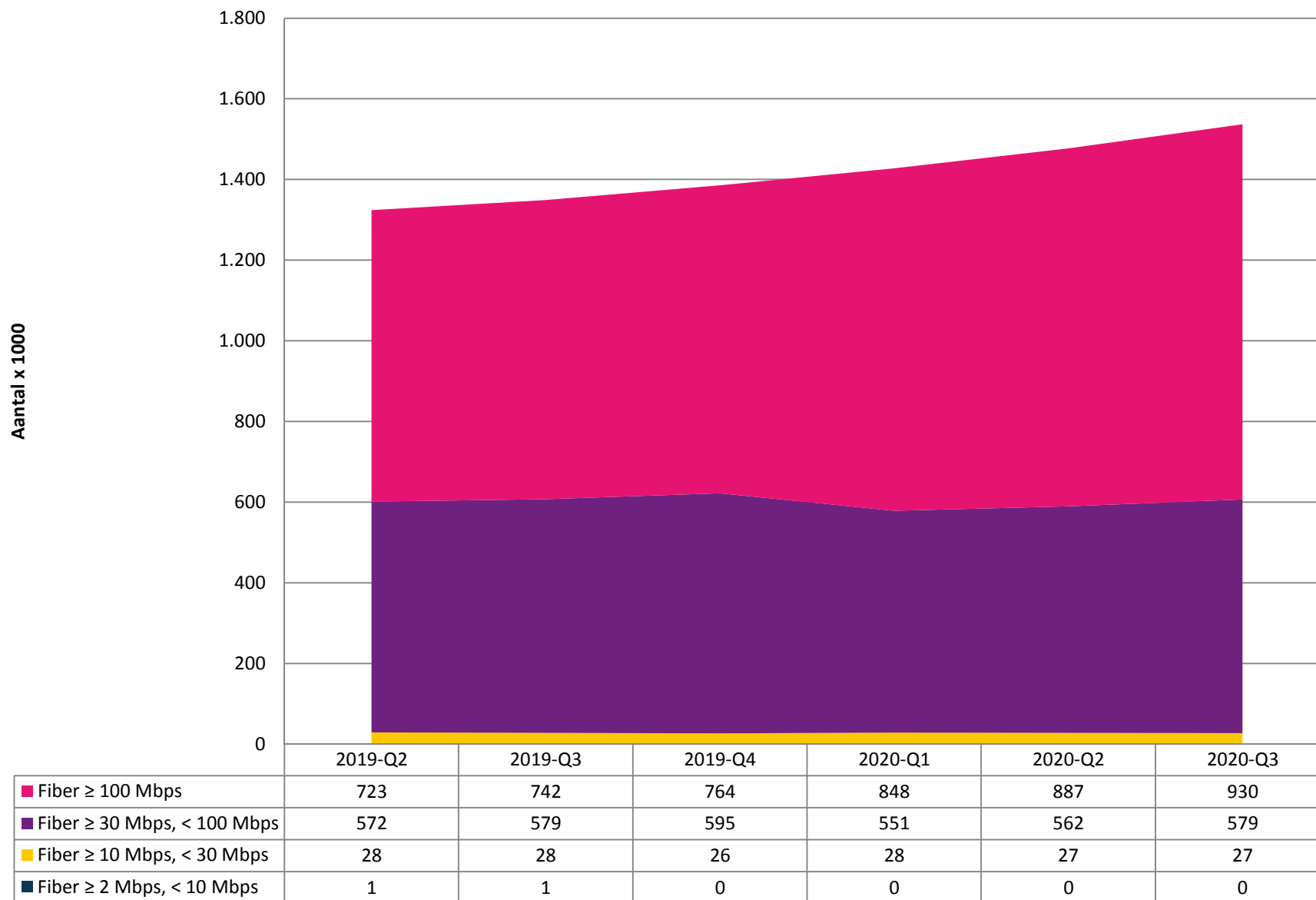
Retail cable connections by speed



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

Broadband

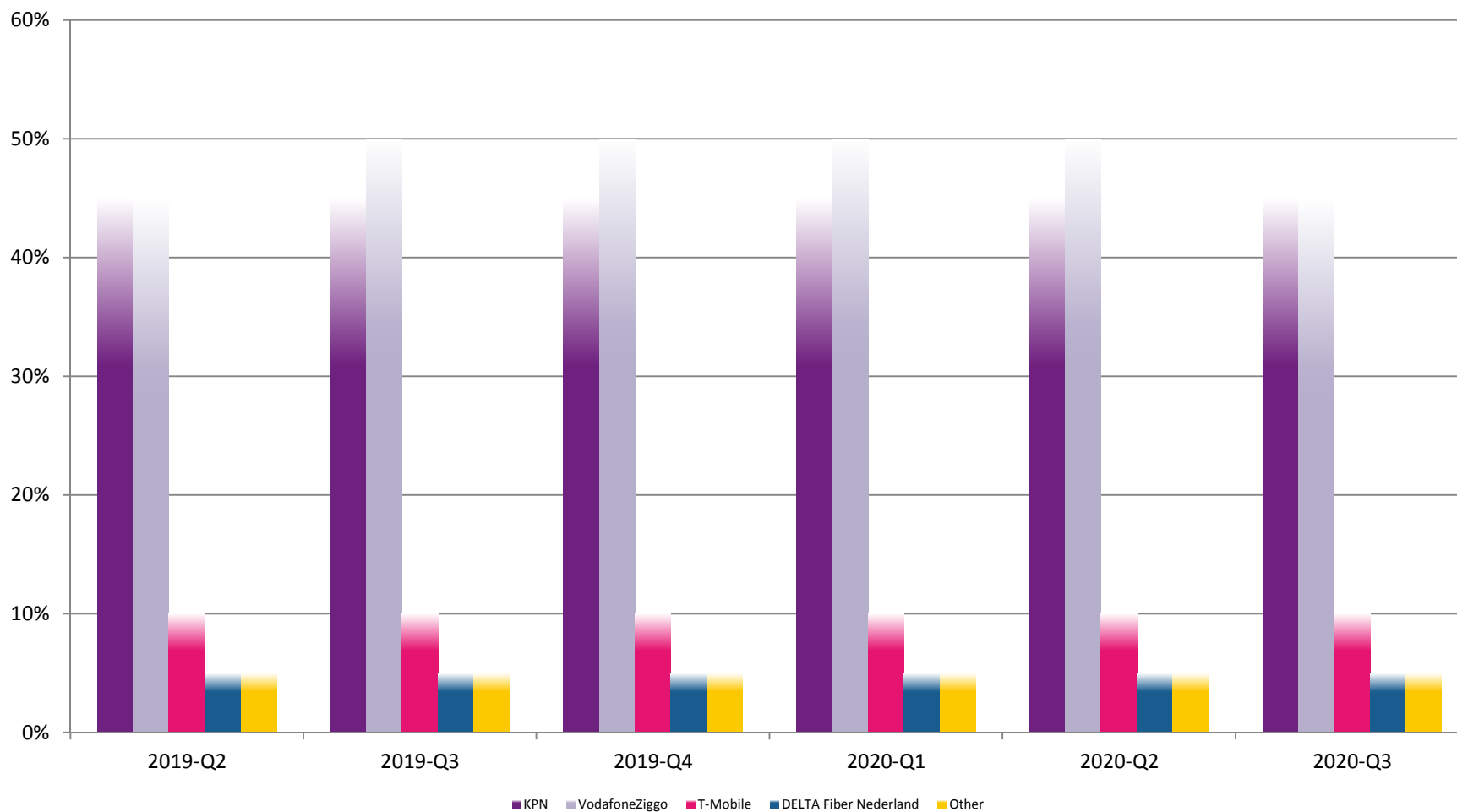
Retail fiber-optic connections by speed



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

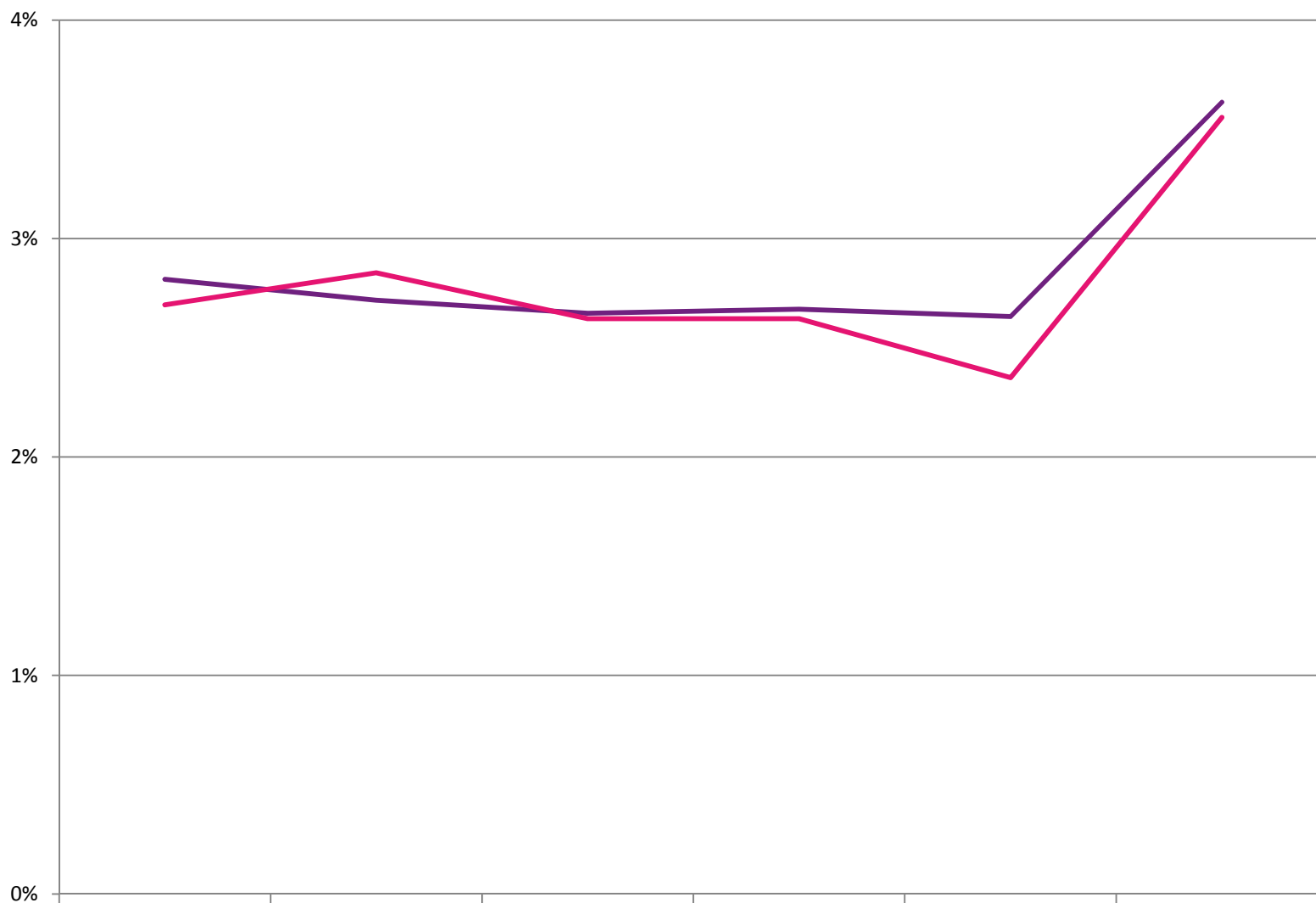


	2019-Q2	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3
KPN	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
VodafoneZiggo	[40 - 45%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[40 - 45%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
DELTA Fiber Nederland	[0 - 5%]	[0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

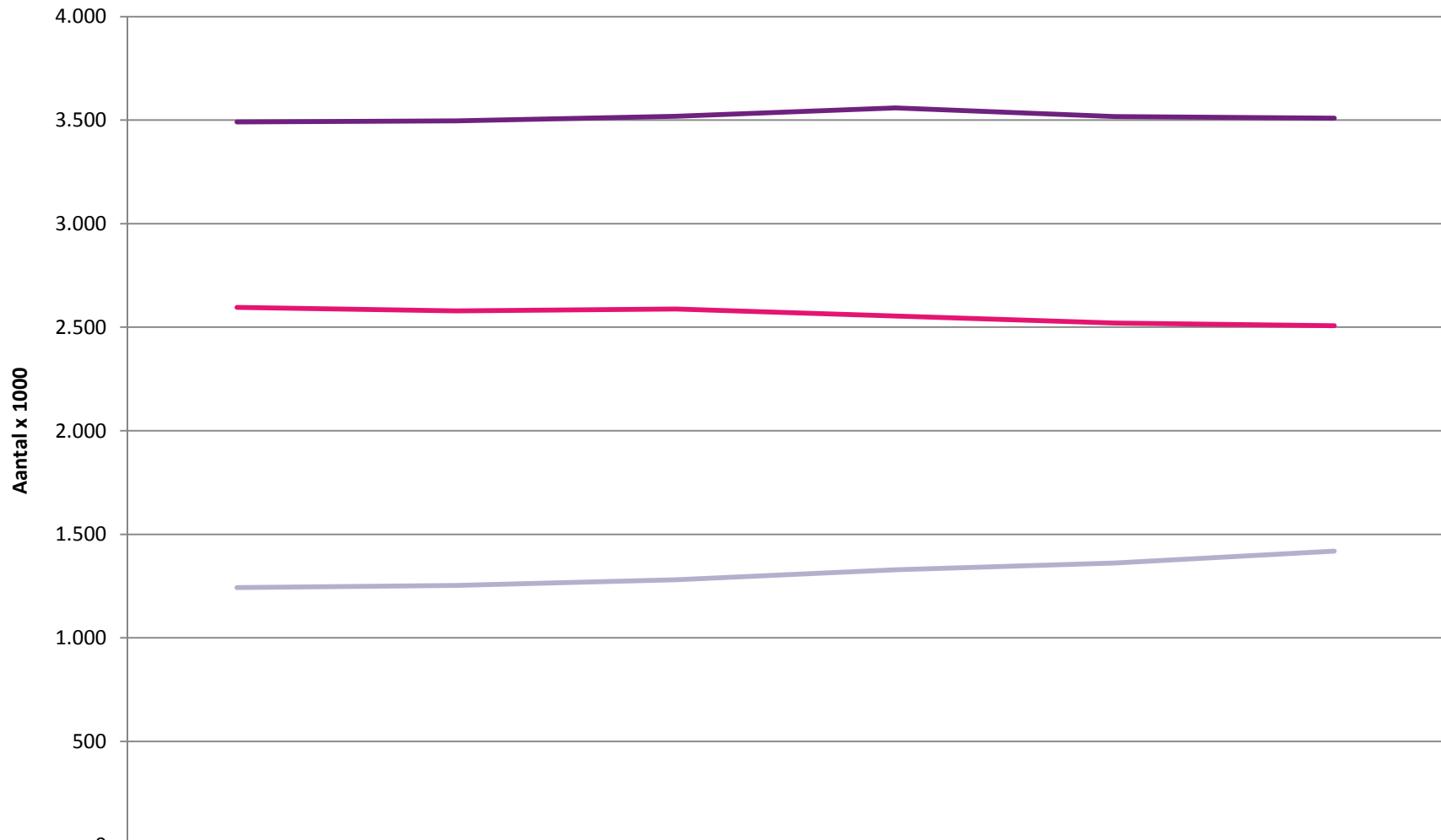
Broadband

Retail churn based on connections



Broadband

Low-quality WBT-connections



	2019-Q2	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3
— DSL	2.596	2.579	2.588	2.553	2.520	2.507
— Cable	3.491	3.497	3.519	3.558	3.517	3.509
— Fiber	1.242	1.254	1.280	1.329	1.362	1.419

Broadband

Market share based on low-quality WBT-connections

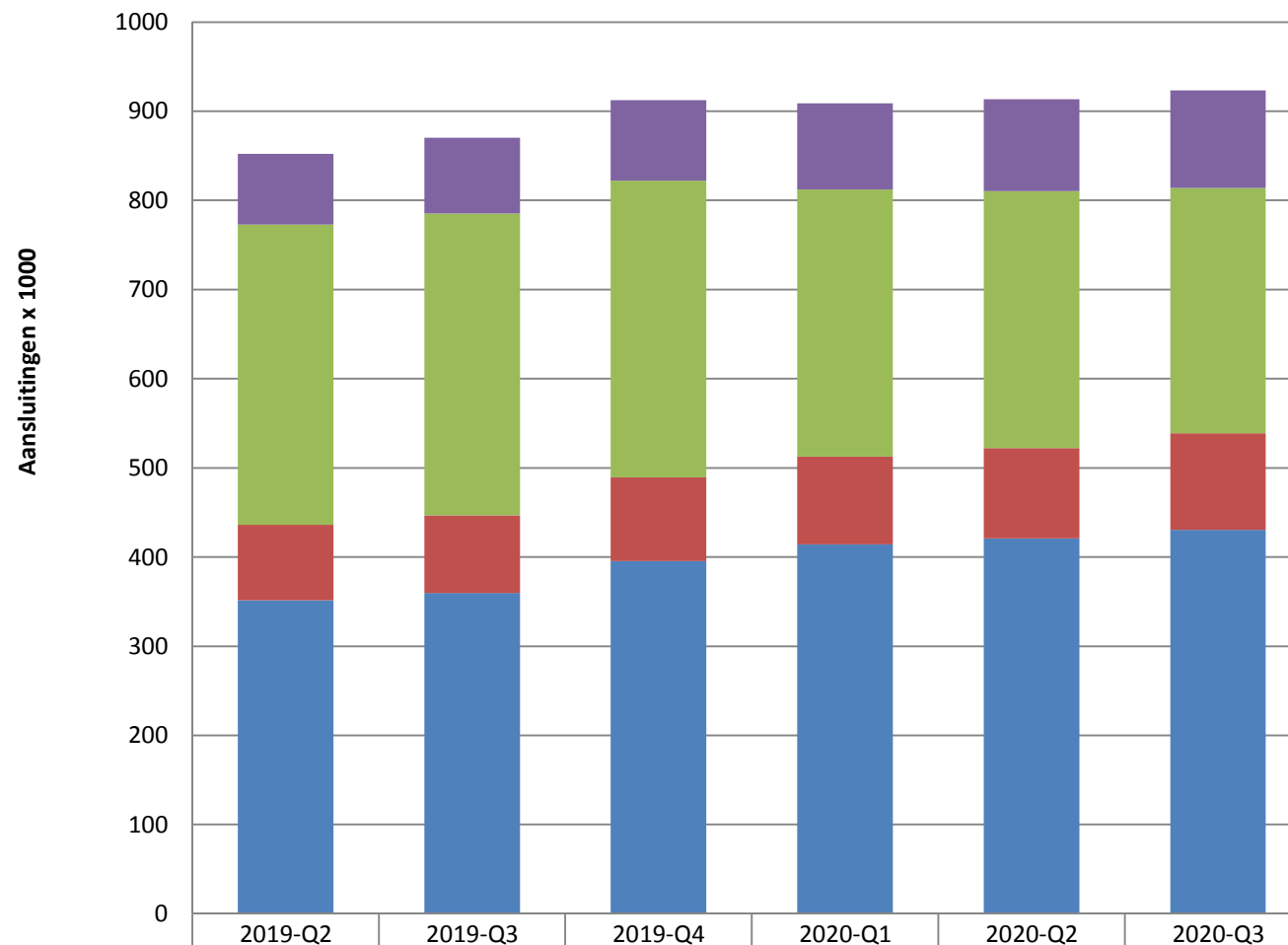


	2019-Q2	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3
KPN	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
VodafoneZiggo	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
T-Mobile	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 5%]	[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-Q2	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3
■ Unbundled Local Loop Fiber (FttH)	79	85	90	96	103	109
■ (Virtual) Unbundles Local Loop Copper	337	338	333	299	288	275
■ Purchase of active fiber optic connections (FttH)	84	87	94	99	101	108
■ Purchase of active copper connections	352	360	396	414	421	431

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

Broadband

Homes connected and activated (FttH)



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

Broadband

Homes connected to upgraded copper



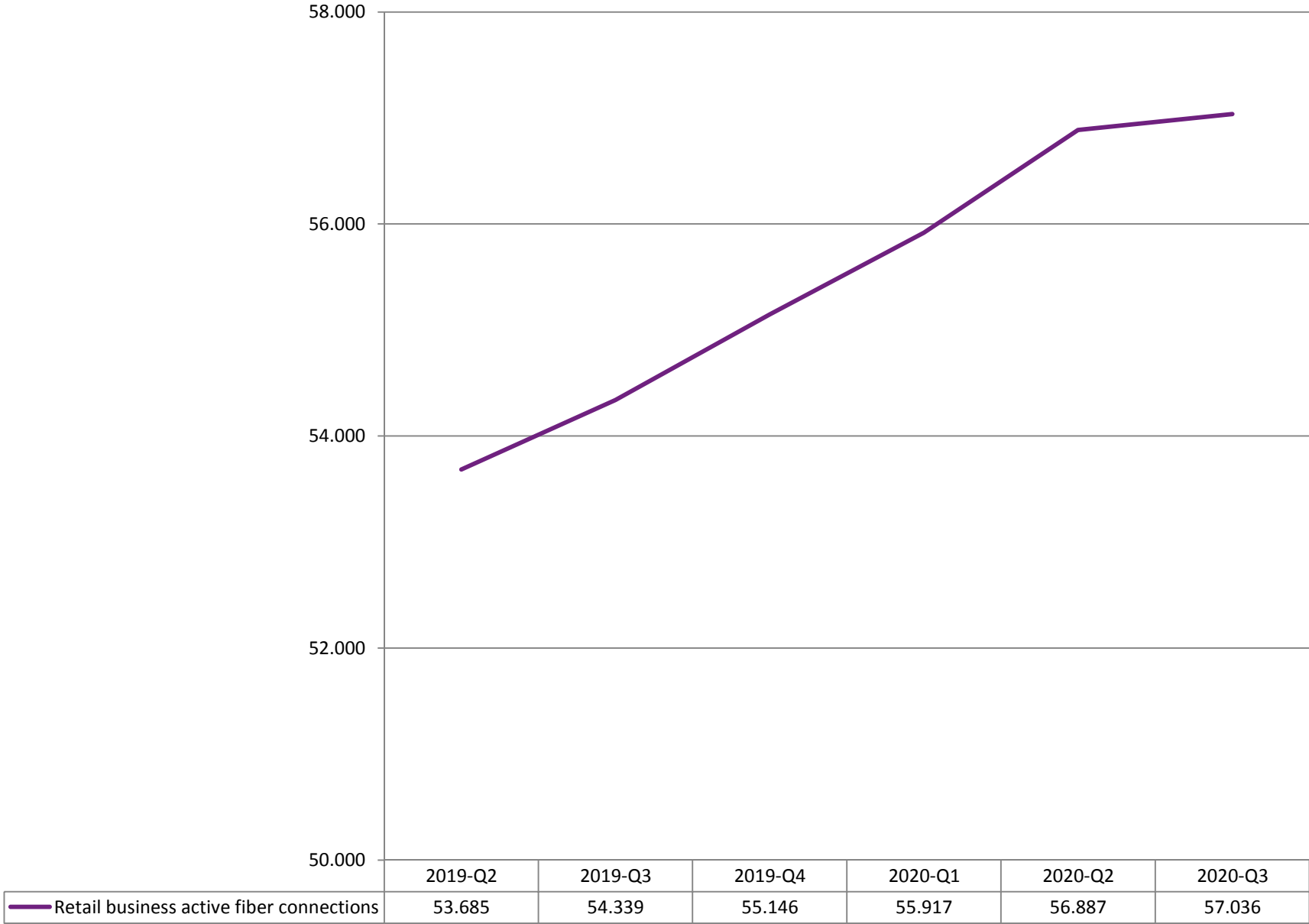
Aantal x 1.000



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

Business network services

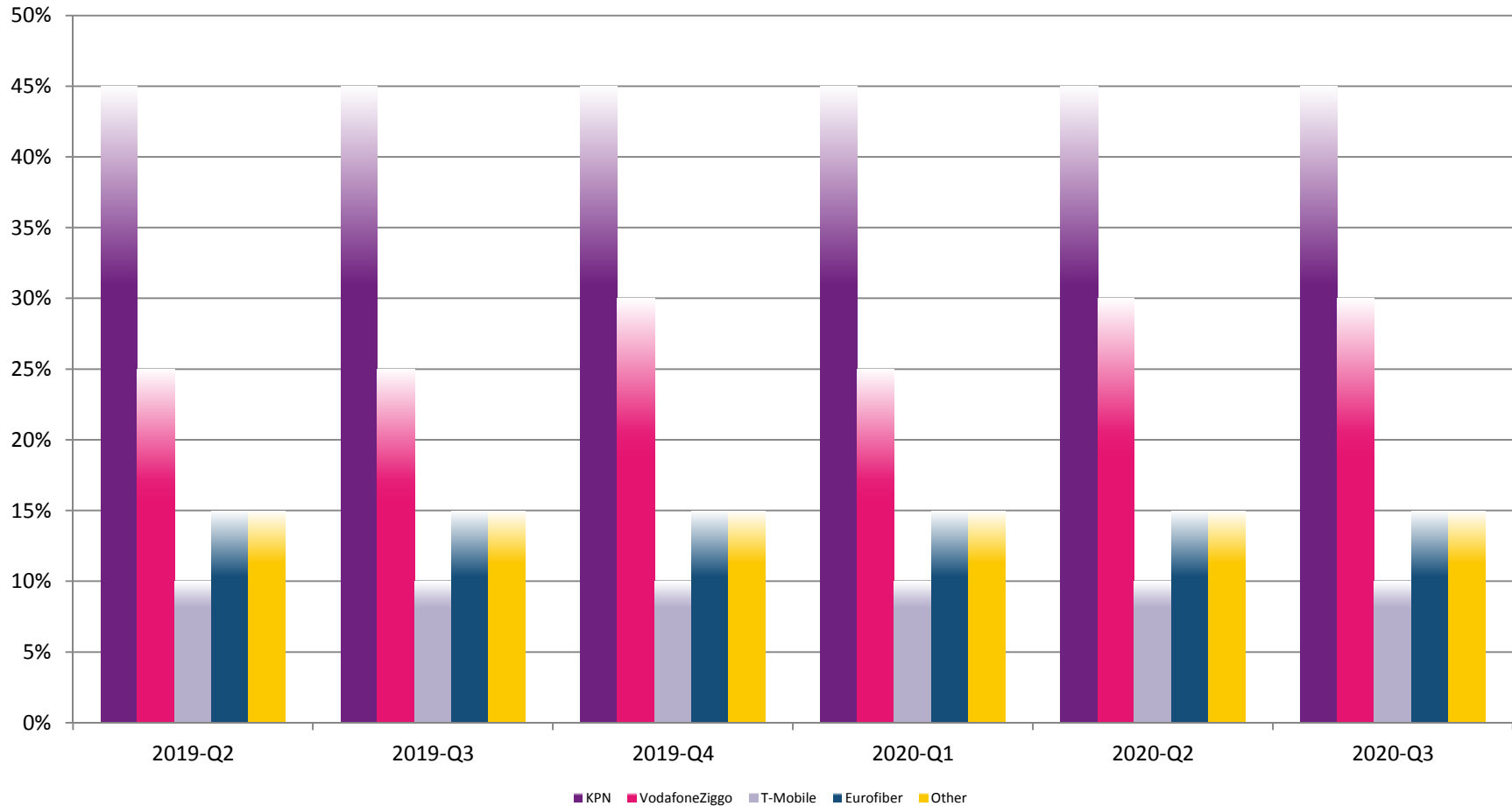
Retail business fiber-optic connections



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-Q2	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3
KPN	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
VodafoneZiggo	[20 - 25%]	[20 - 25%]	[25 - 30%]	[20 - 25%]	[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

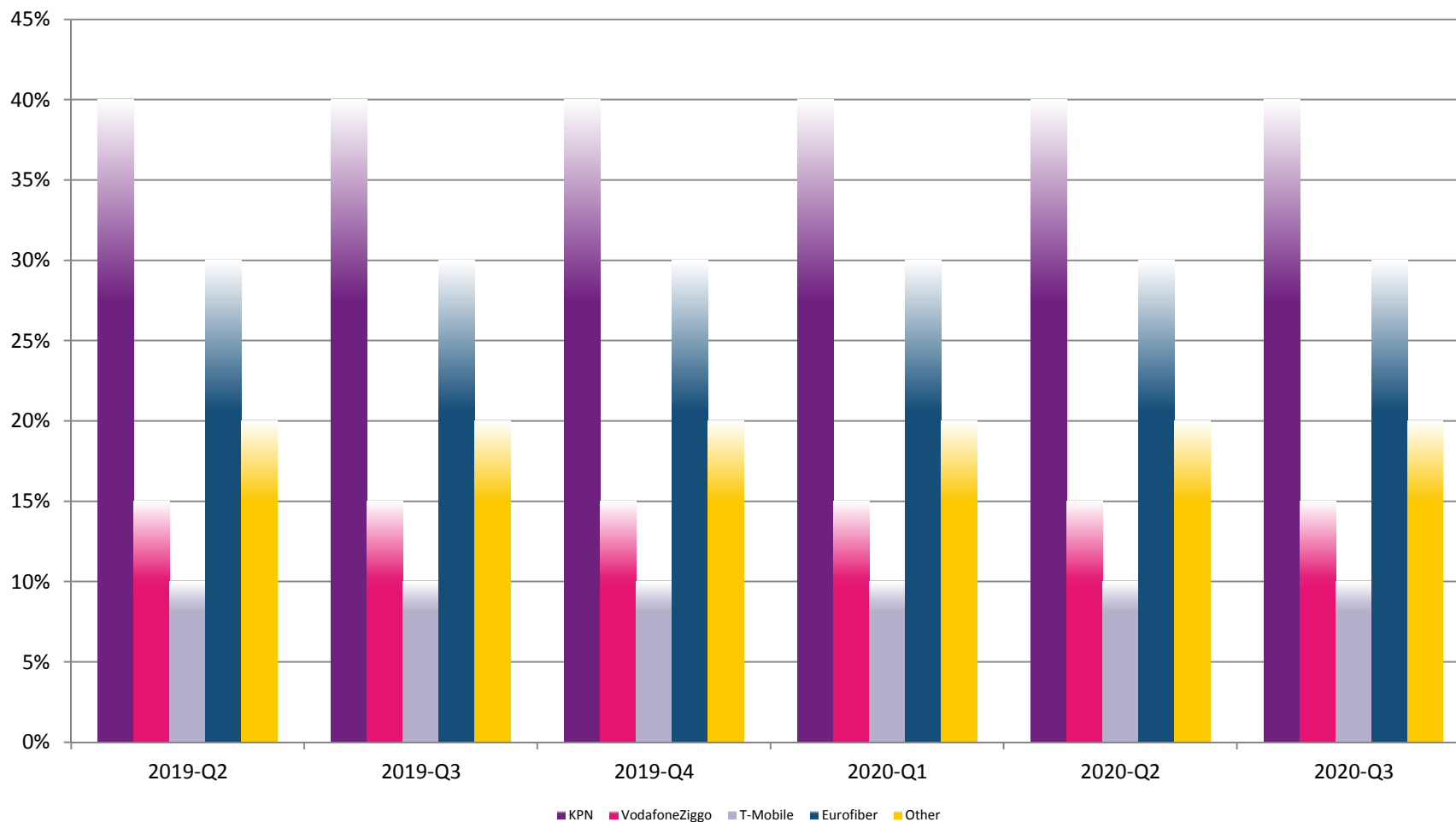
Wholesale business fiber-optic connections



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

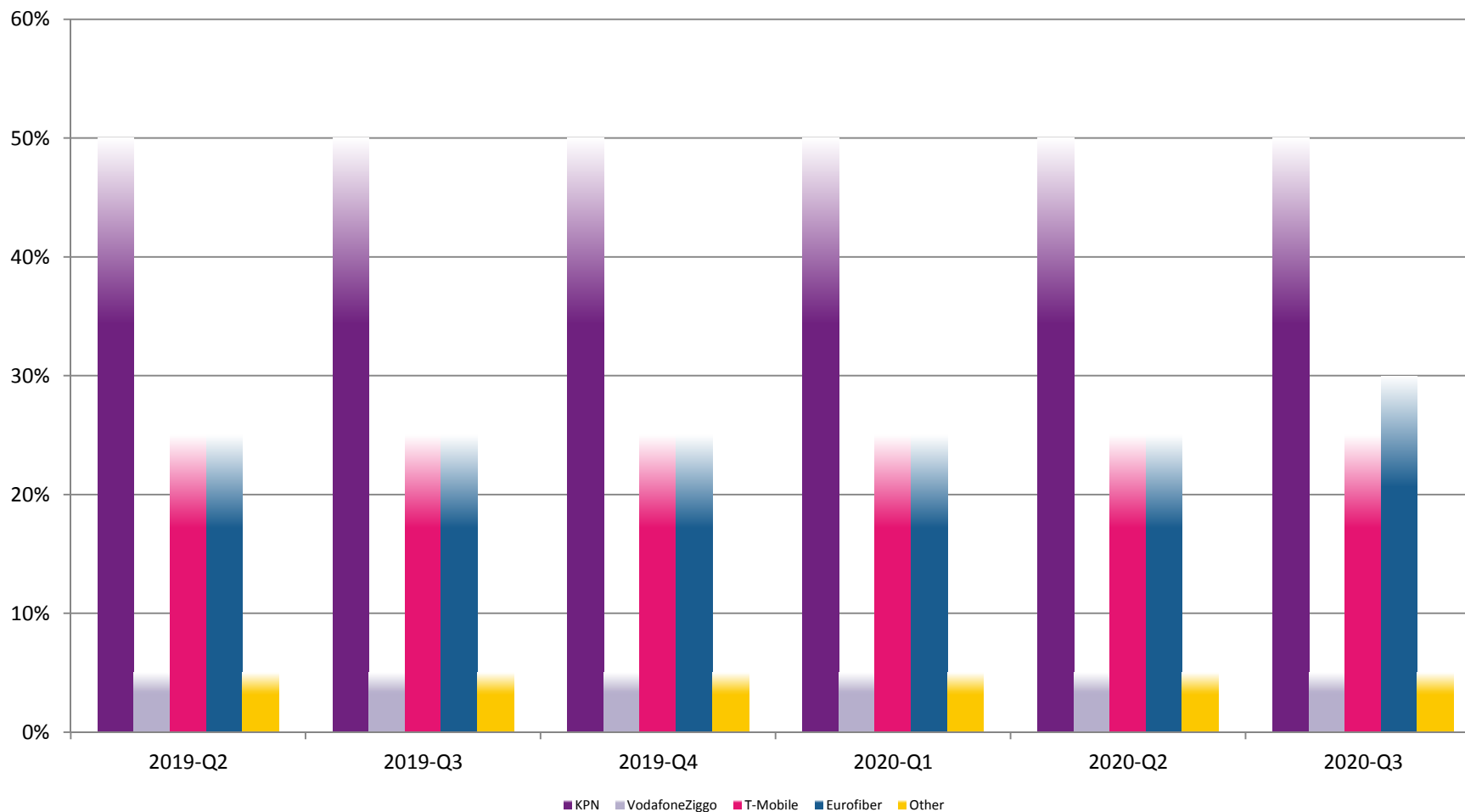
Wholesale HKWBT and leased lines



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

Business network services

Wholesale market share of HKWBT and leased lines



	2019-Q2	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3
KPN	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
VodafoneZiggo	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
T-Mobile	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]
Eurofiber	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[25 - 30%]
Other	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]

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

Television

Retail subscriptions per connection type

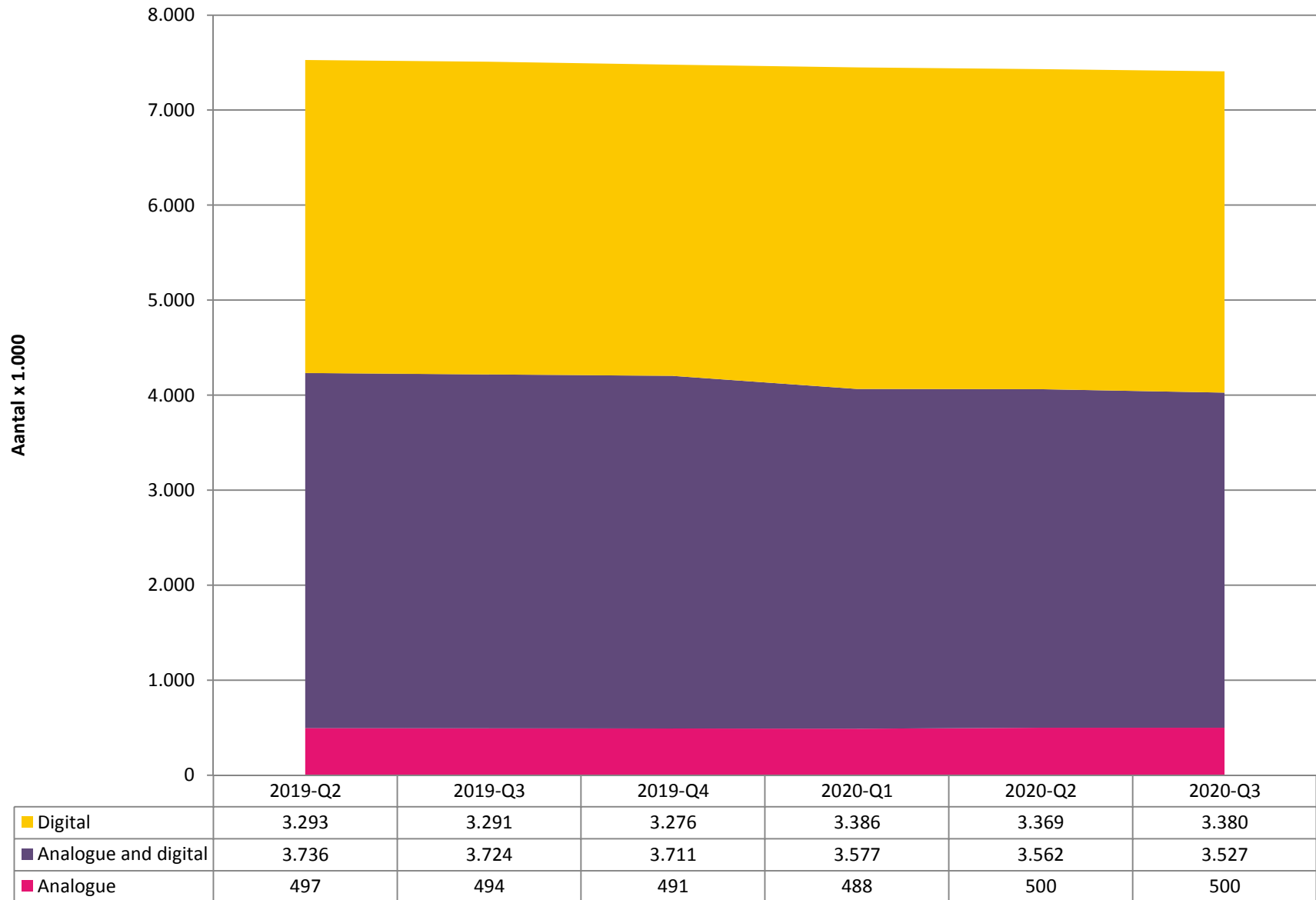


Op basis van vragen 40_A1_1_1-2-3, 40_A1_2_1-2, 40_A1_3_1-2-3, en 40_A1_4_1-2-3-4 van de Telecommonitor

Digitale platforms zijn bijvoorbeeld DSL, Digitenne en Satelliet.

Television

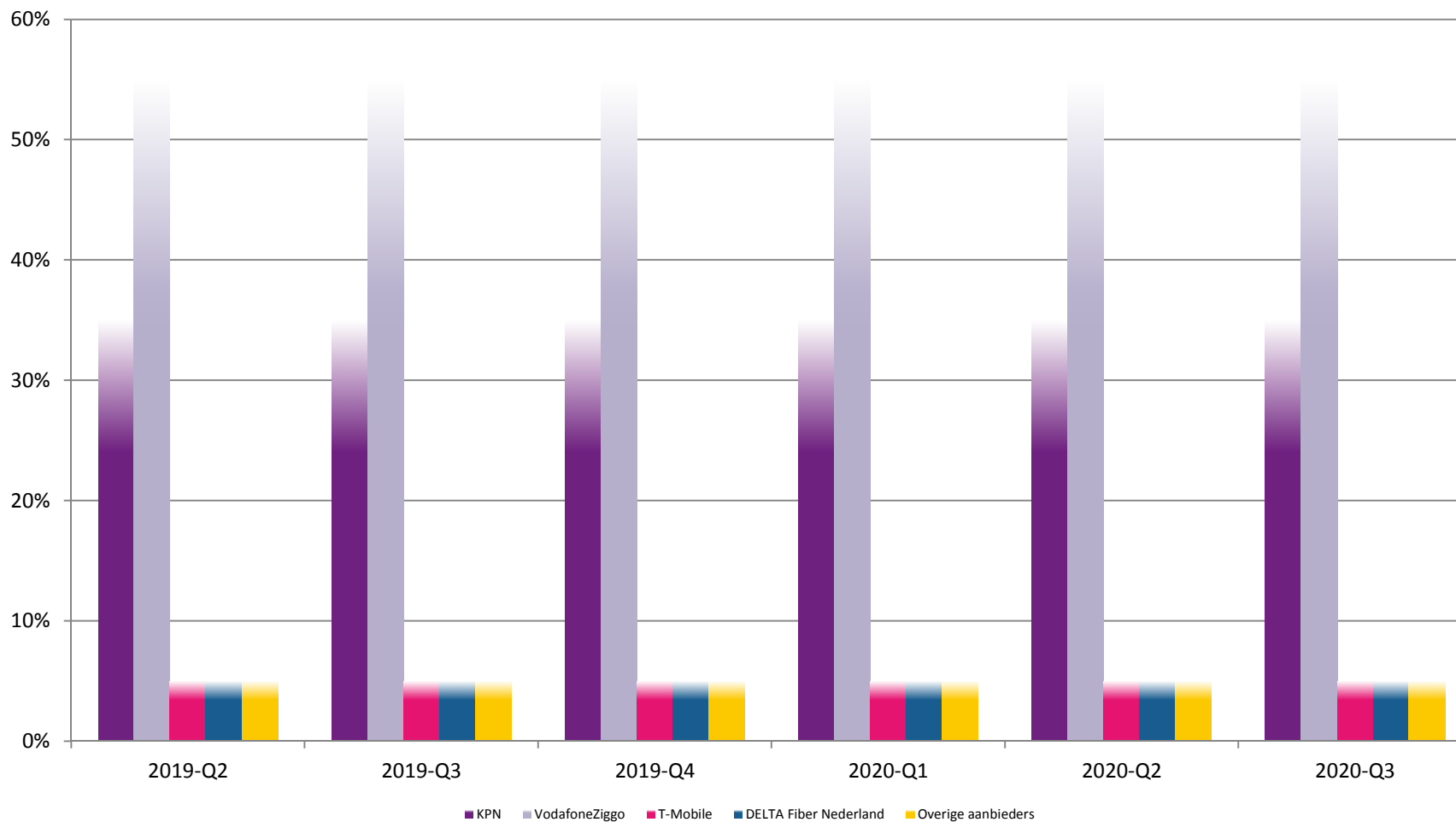
Digitalization of television subscriptions



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

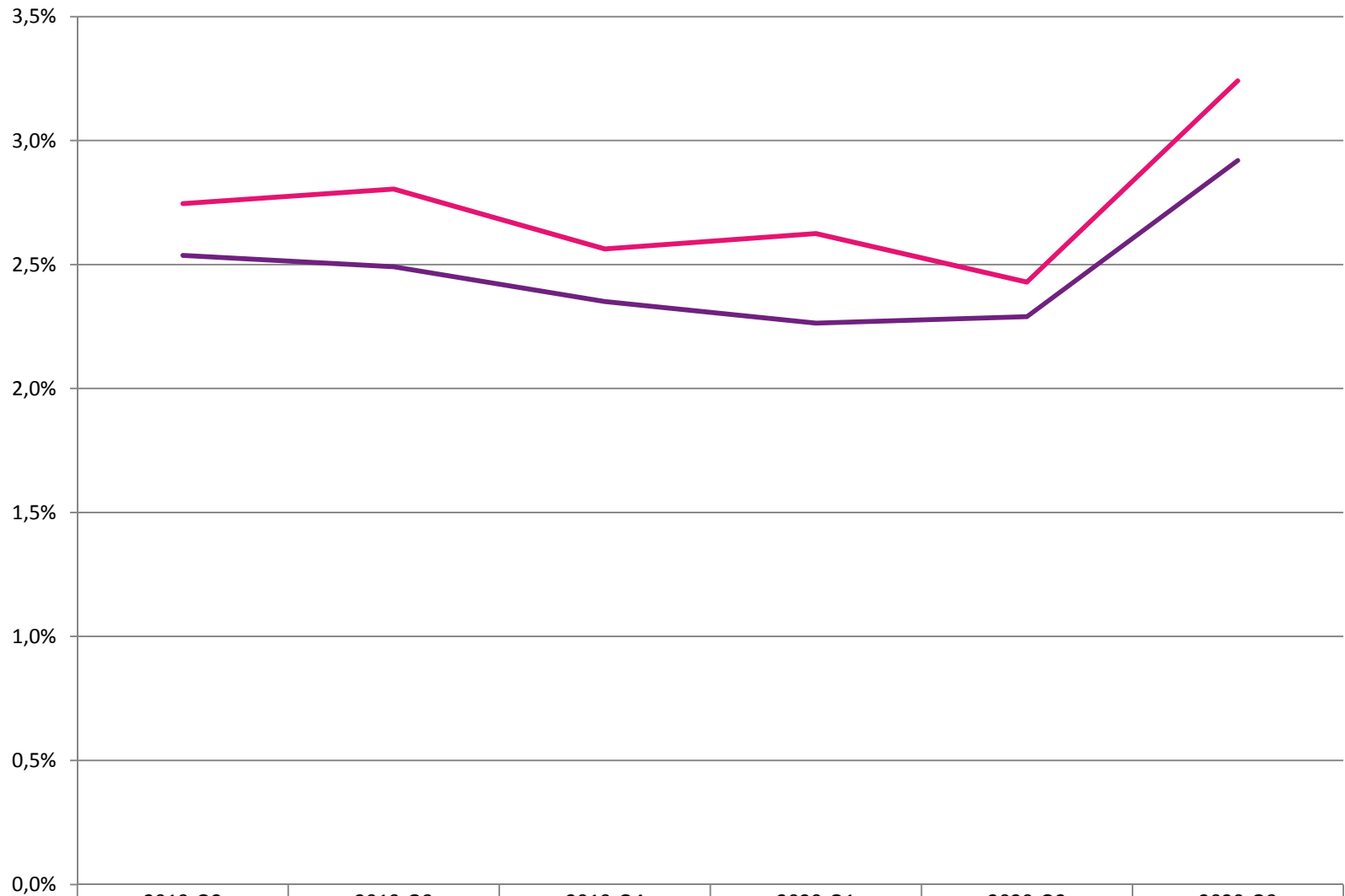


	2019-Q2	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3
KPN	[30 - 35%]	[30 - 35%]	[30 - 35%]	[30 - 35%]	[30 - 35%]	[30 - 35%]
VodafoneZiggo	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]
T-Mobile	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 5%]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

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

Television

Retail churn of television subscriptions



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

Television

Retail turnover of radio/tv subscriptions



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

Television

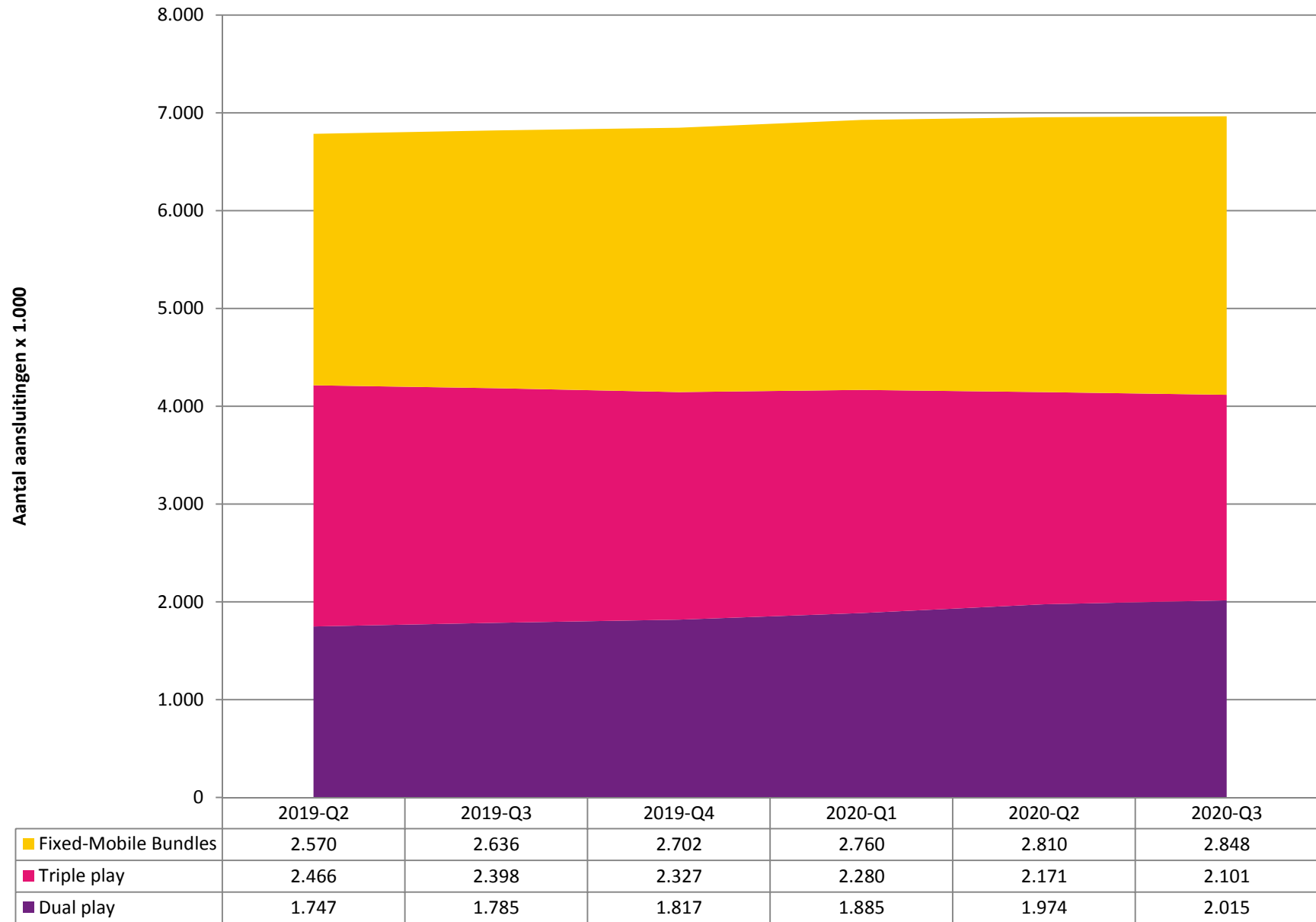
Homes passed and cable penetration level



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

Bundles

Retail connections of bundles

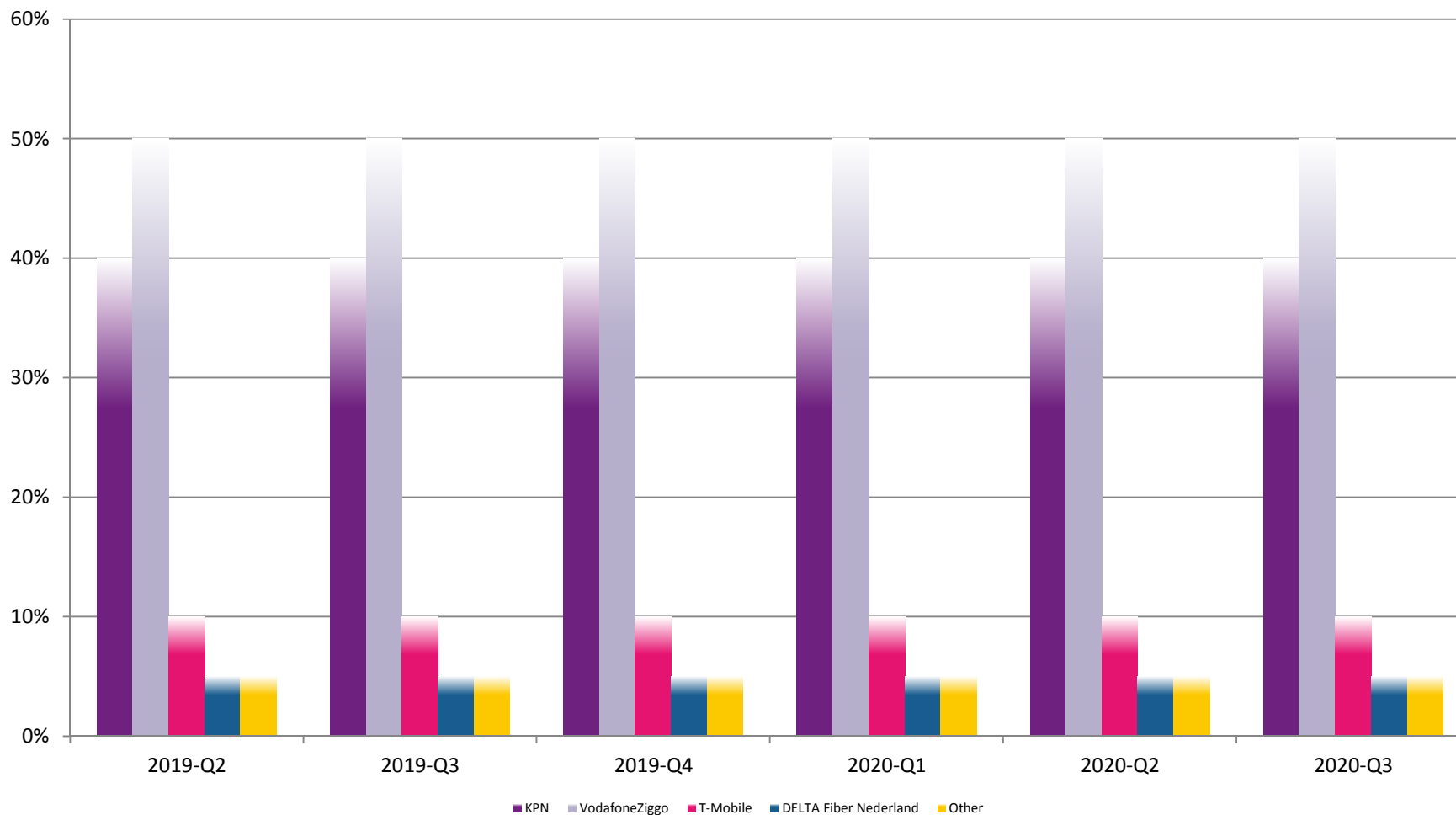


Op basis van vragen 50_A1_1_1-2-3-5-6, 50_A1_2_1-2-3-4, en 50_A1_3_1 van de Telecommonitor

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

Bundles

Retail market share of bundles

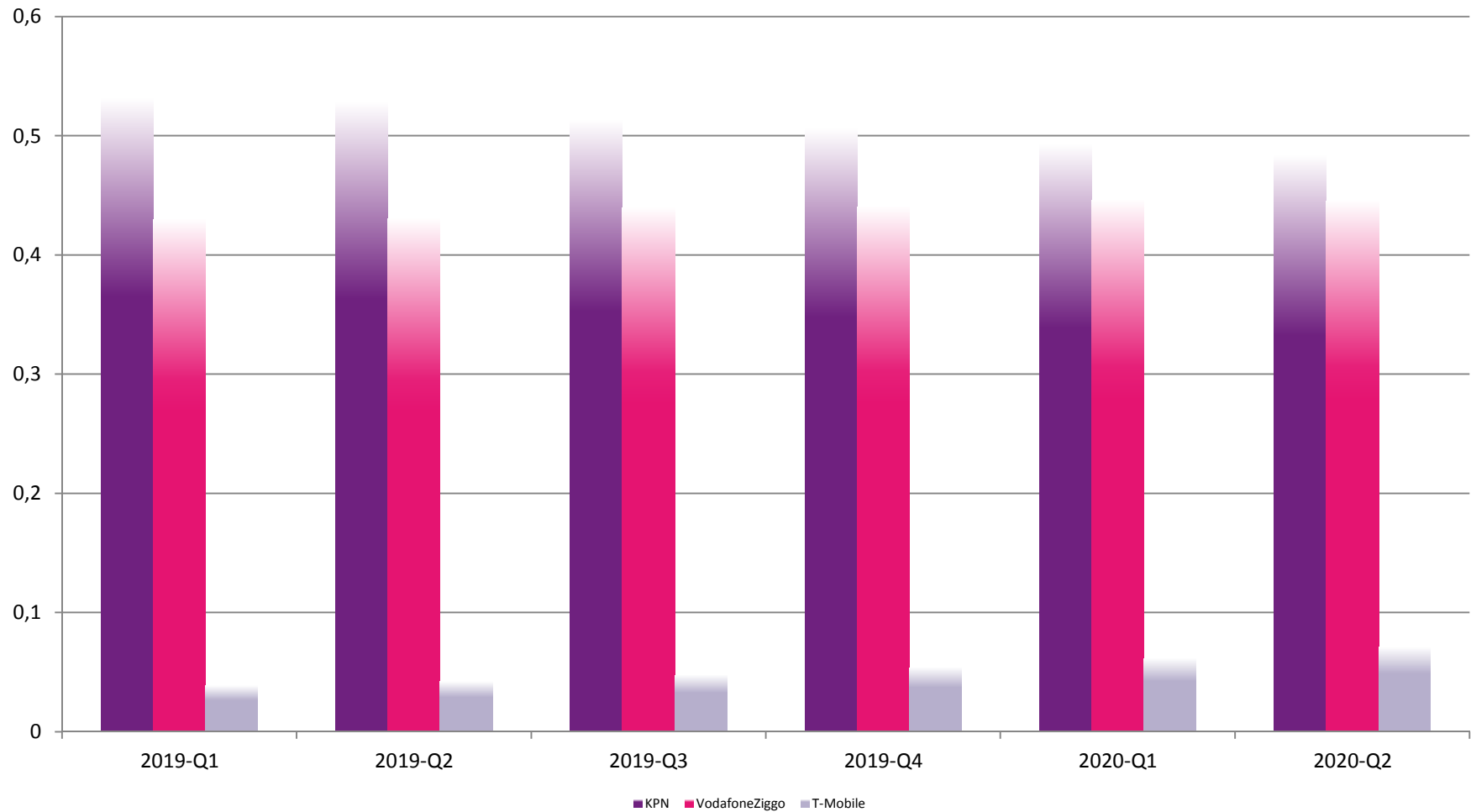


	2019-Q2	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3
KPN	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]
VodafoneZiggo	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
DELTA Fiber Nederland	[0 - 5%]	[0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

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

Bundles

Retail market share of bundles with mobile



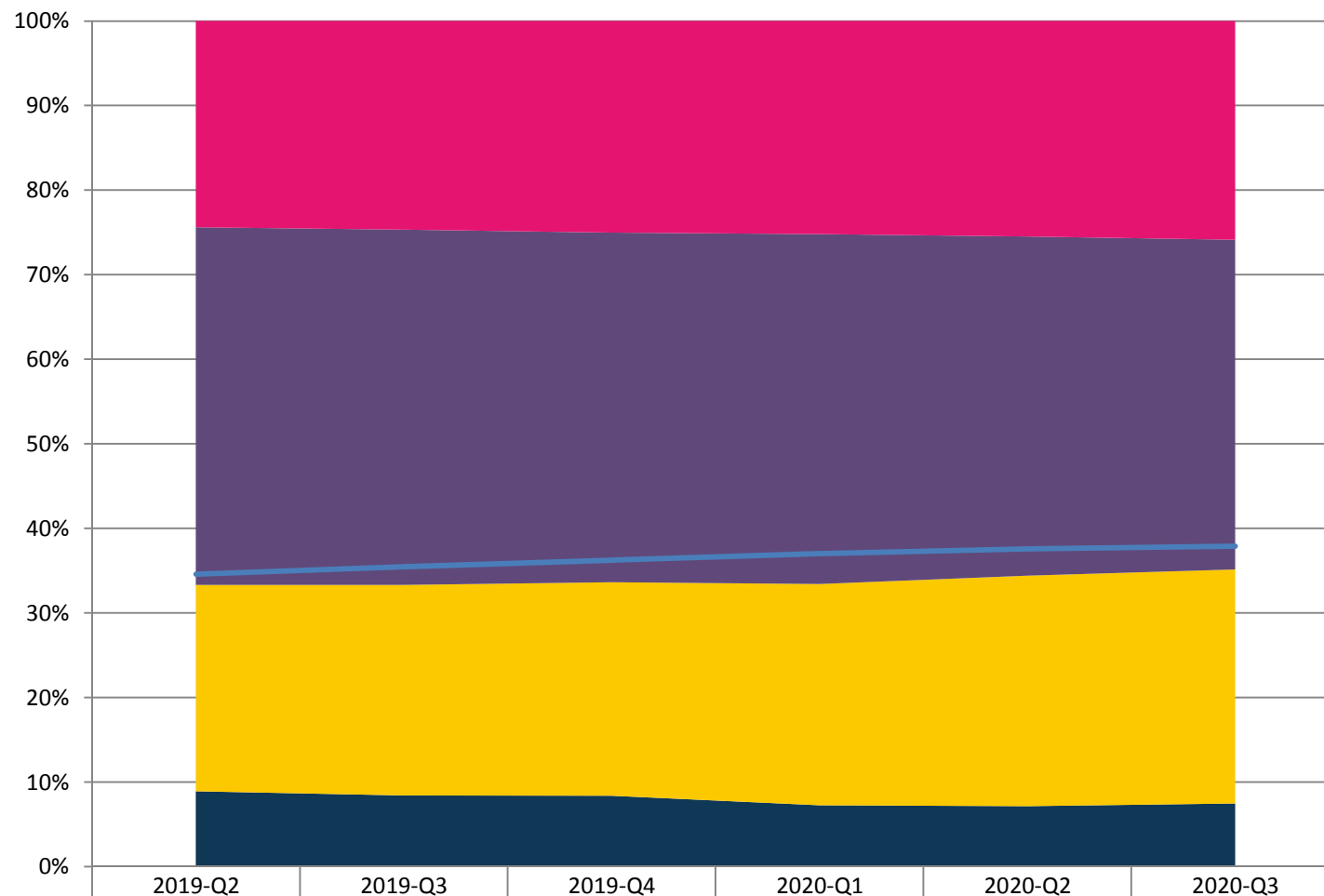
	2019-Q2	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3
KPN	[50 - 55%]	[50 - 55%]	[50 - 55%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
VodafoneZiggo	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
T-Mobile	[0 - 5%]	[0 - 5%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]

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-Q2	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3
■ Broadband in Fixed-Mobile	24%	25%	25%	25%	25%	26%
■ Broadband in triple play	42%	42%	41%	41%	40%	39%
■ Broadband in dual play	24%	25%	25%	26%	27%	28%
■ Broadband only	9%	8%	8%	7%	7%	7%
■ Breedband in vast-mobiel	35%	35%	36%	37%	38%	38%

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

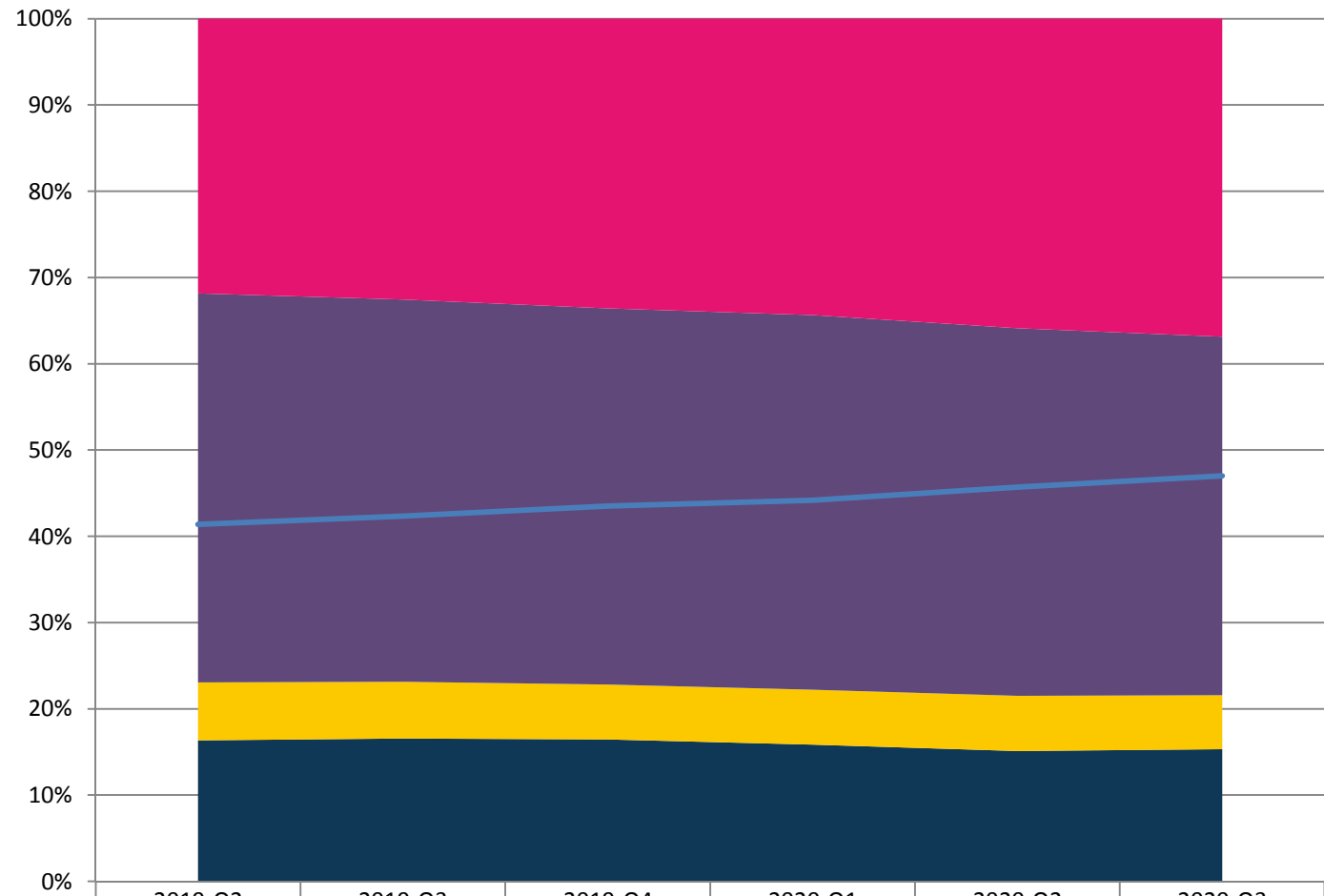


	2019-Q2	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3
TV in Fixed-Mobile	23%	24%	24%	24%	25%	25%
TV in triple play	39%	39%	39%	39%	38%	37%
TV in dual play	18%	18%	19%	20%	22%	22%
TV only	20%	19%	18%	16%	16%	15%
TV in vast-mobiel	49%	51%	52%	53%	55%	56%

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-Q2	2019-Q3	2019-Q4	2020-Q1	2020-Q2	2020-Q3
Fixed telephony in Fixed-Mobile	32%	33%	34%	34%	36%	37%
Fixed telephony in triple play	45%	44%	44%	43%	43%	42%
Fixed telephony in dual play	7%	7%	6%	6%	6%	6%
Fixed telephony only	16%	17%	16%	16%	15%	15%
Vaste telefonie in vast-mobiel	41%	42%	43%	44%	46%	47%

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

Interviewed market participants

Data is provided per market by the below market participants

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