Authority for Consumers & Markets

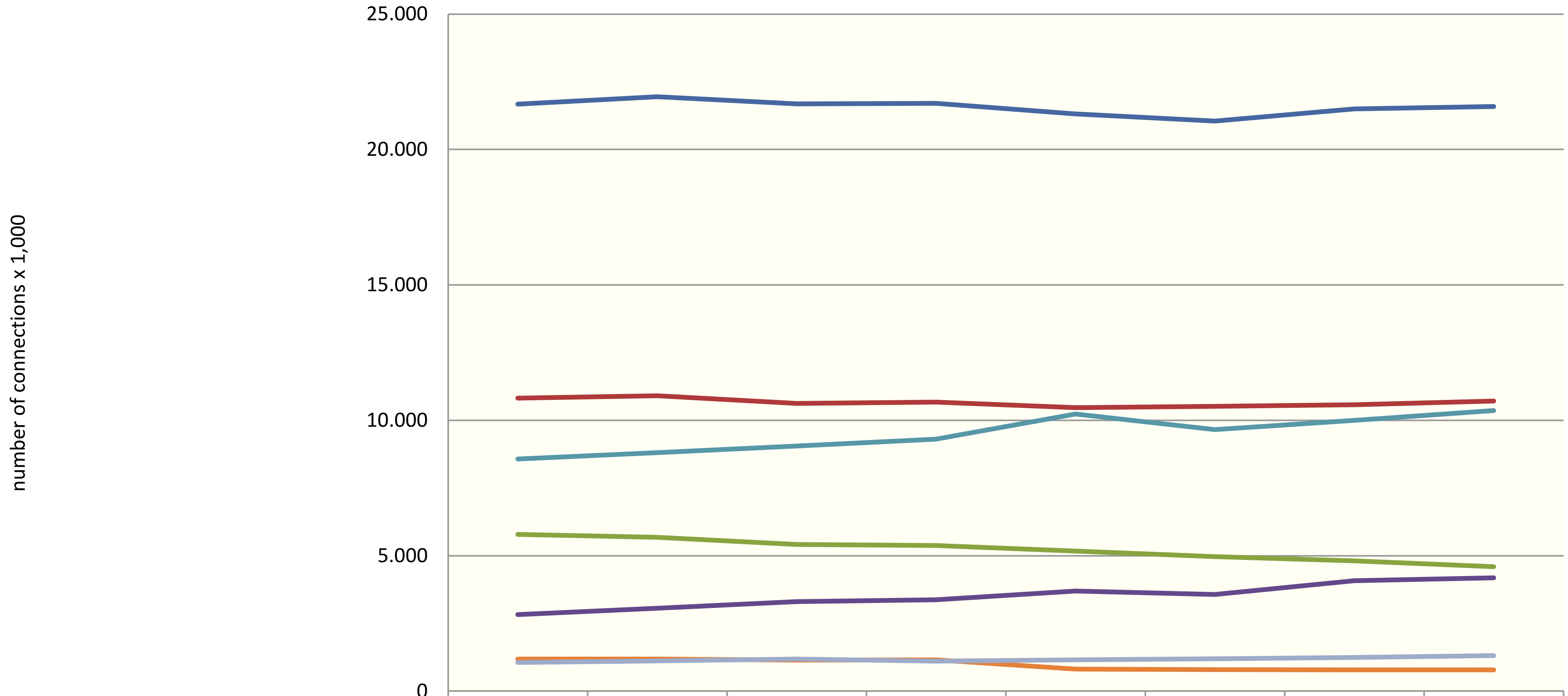
ACM Public version

Telecommonitor
First quarter 2014

The Netherlands Authority for Consumers and Markets (ACM) publishes each quarter the figures concerning the telecom sector. The Telecommonitor offers an overview of the market trends in electronic communication, based on the figures provided by the most significant market players.

The Market Monitor is largely based on data that ACM collects through its Telecommonitor. For the Telecommonitor, the largest market participants provide data on their activities on a regular basis. ACM verifies these data. In addition, ACM uses studies and media reports. This is how ACM keeps an eye on trends in various markets. The figures form an important basis for ACM's market analyses that are published every three years.

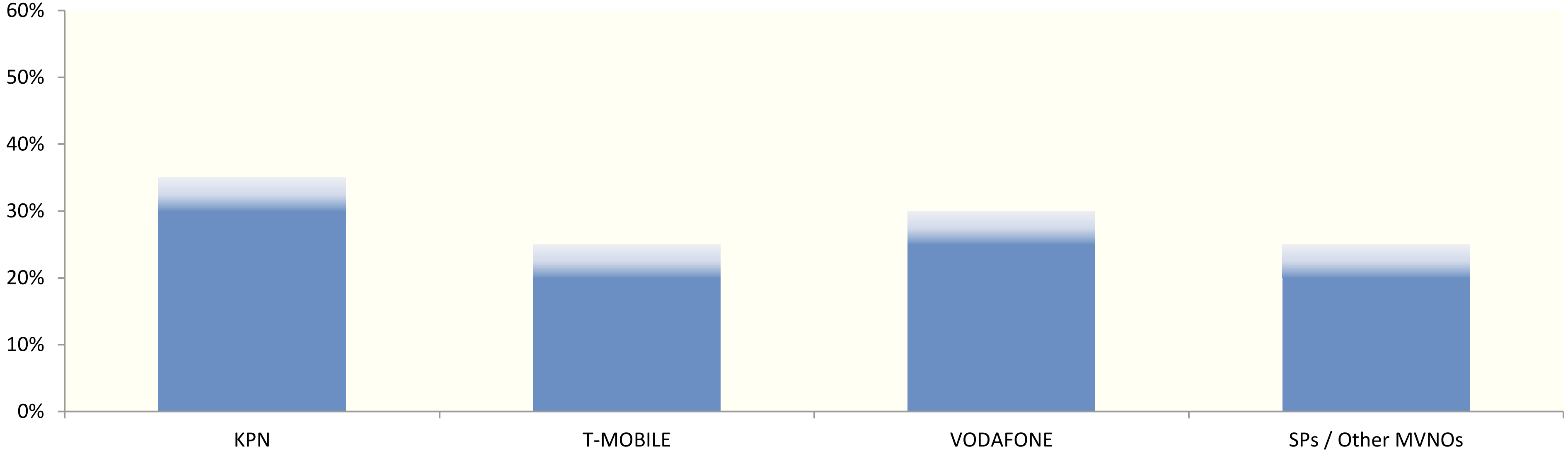
Mobile: Number of retail mobile connections



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
Total	21.679	21.945	21.681	21.702	21.314	21.047	21.500	21.589
Postpaid MNO	10.824	10.904	10.623	10.674	10.466	10.516	10.572	10.711
Prepaid MNO	5.784	5.678	5.420	5.378	5.174	4.969	4.815	4.592
Connections MVNO	2.829	3.062	3.304	3.375	3.700	3.575	4.081	4.182
Connections with mobile broadband	8.574	8.811	9.051	9.307	10.236	9.653	10.000	10.358
Dedicated mobile broadband connections	1.186	1.184	1.152	1.162	813	795	786	789
M2M	1.057	1.118	1.183	1.113	1.162	1.192	1.247	1.315

Based on questions 1_A_2_1-2-4-5-6-7 and 1_B_5_2-7-8 of the Telecommonitor.

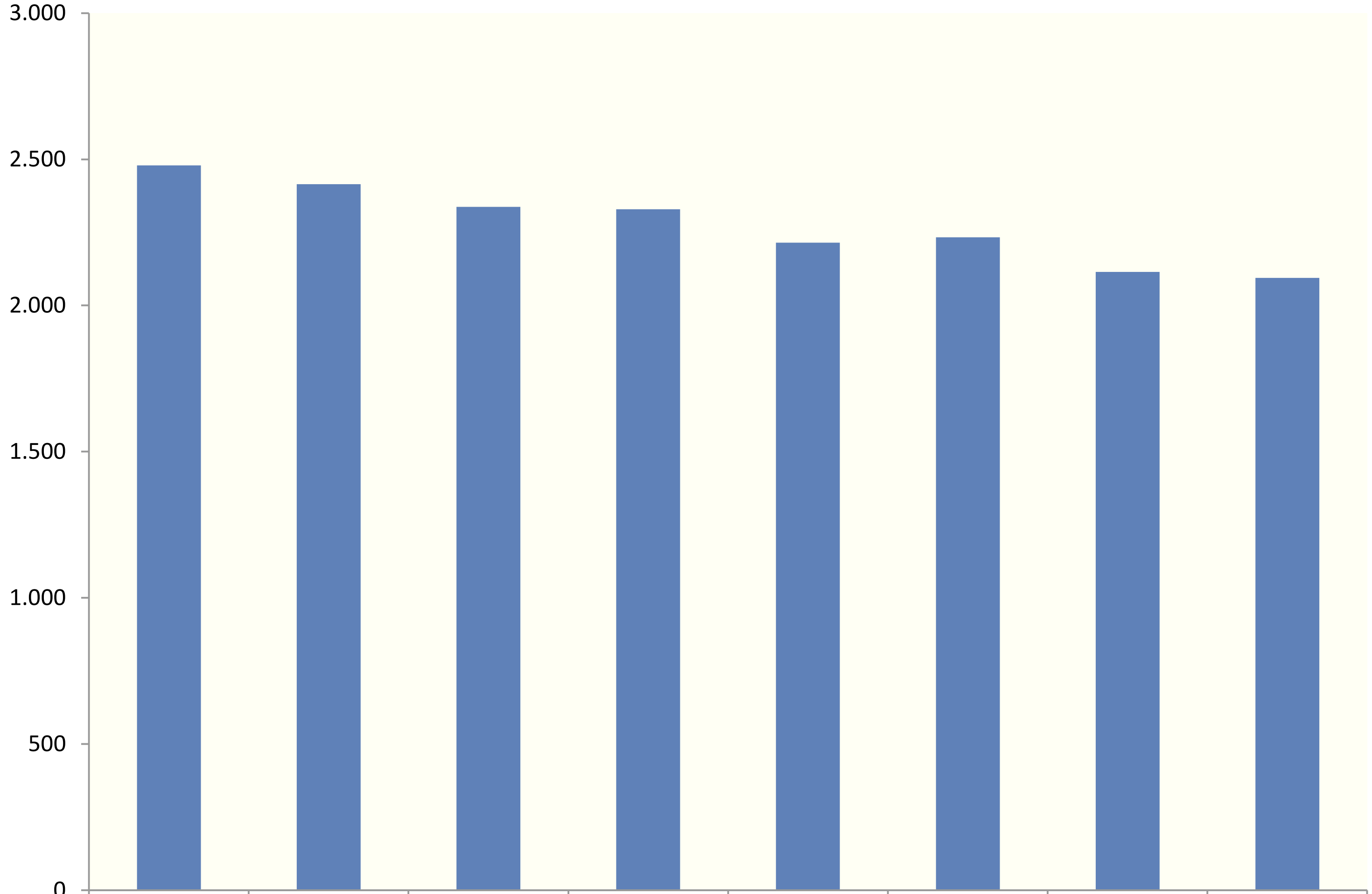
Mobile: Retail market shares based on connections (2014Q1)



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
KPN	[30-35%]	[30-35%]	[30-35%]	[30-35%]	[30-35%]	[30-35%]	[30-35%]	[30-35%]
T-MOBILE	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]
VODAFONE	[25-30%]	[25-30%]	[25-30%]	[25-30%]	[25-30%]	[25-30%]	[25-30%]	[25-30%]
SPs / Other MVNOs	[10-15%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[20-25%]	[20-25%]

Based on questions 1_A_2_1, 1_A_2_2 and 1_B_5_2 of the Telecommonitor.

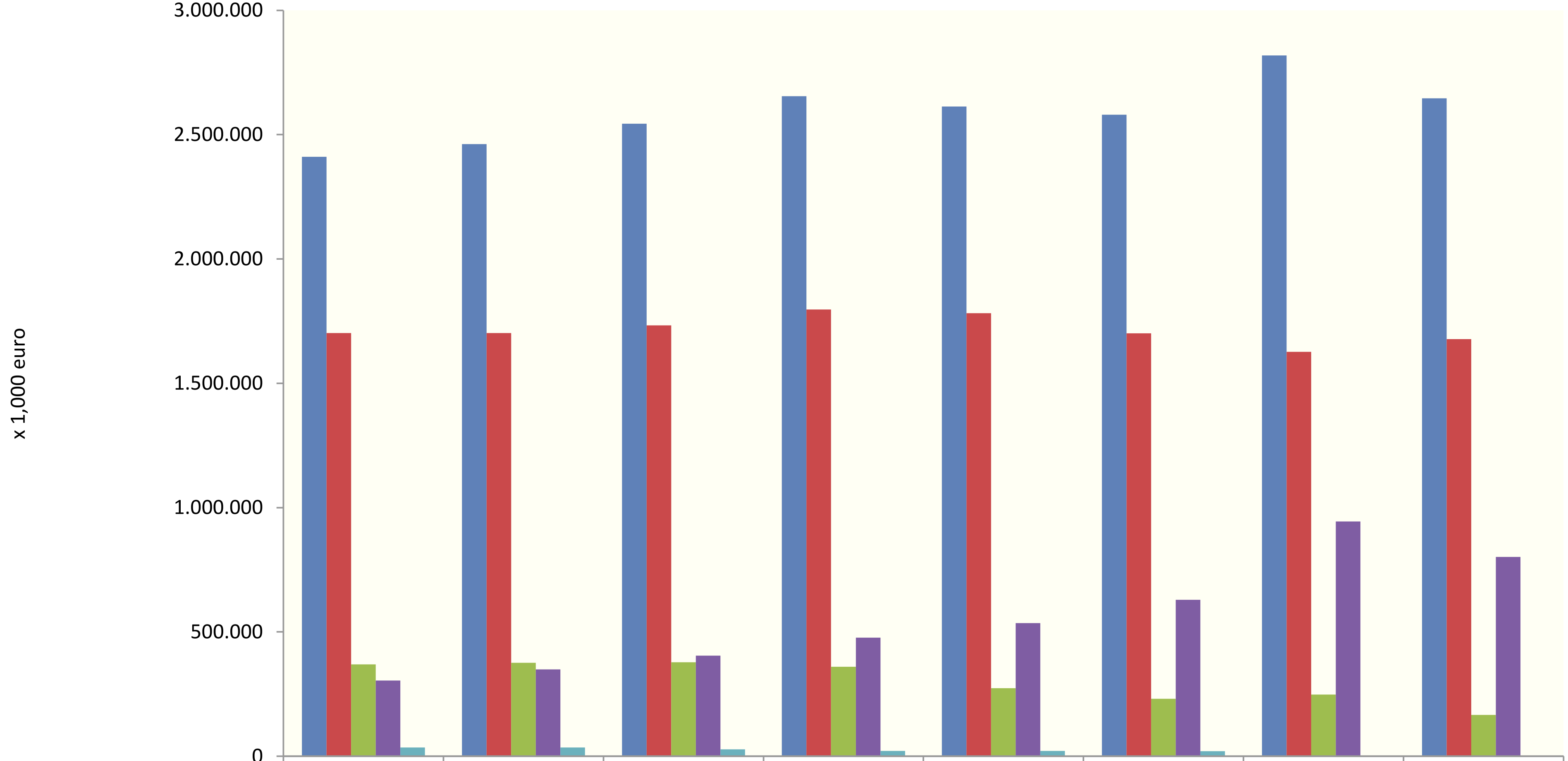
Mobile: Herfindahl-Hirschman Index of retail mobile connections



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
HHI of the total number of retail mobile connections	2.480	2.415	2.337	2.329	2.215	2.233	2.115	2.094

Based on questions 1_A_2_1, 1_A_2_2 and 1_B_5_2 of the Telecommonitor.

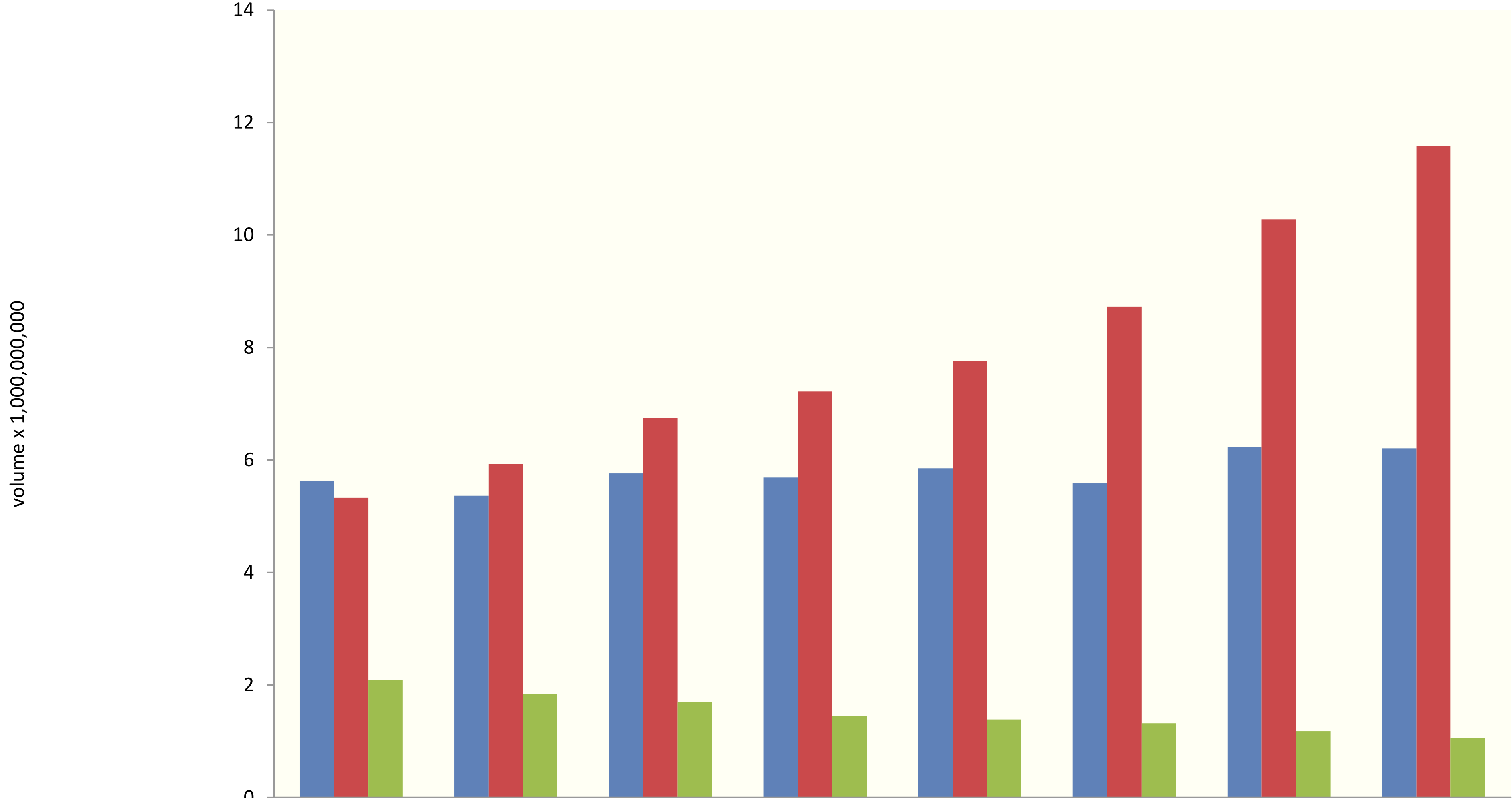
Mobile: Retail revenues per half year



	30-6-2010	31-12-2010	30-6-2011	31-12-2011	30-6-2012	31-12-2012	30-6-2013	31-12-2013
Total revenues	2.411.120	2.462.398	2.544.132	2.655.136	2.612.985	2.580.758	2.818.730	2.646.062
Voice revenues	1.702.218	1.702.277	1.733.362	1.796.569	1.782.147	1.700.682	1.626.285	1.677.777
Revenues for SMS services	369.265	376.087	378.393	359.758	273.954	231.299	248.481	166.261
Revenues for data services	304.057	349.056	404.949	477.411	535.616	628.728	943.964	802.024
Other revenues (content)	35.580	34.977	27.428	21.398	21.268	20.049		

Based on questions 1_A_1_1 through 1_A_1_7 of the Telecommonitor.

Mobile: Volume retail minutes of traffic, data and sms (MNOs and MVNOs)



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
Minutes of traffic (x 1,000)	5.634.160	5.363.795	5.760.782	5.686.770	5.853.737	5.582.763	6.224.566	6.205.108
Data (x 1,000 MB)	5.331.243	5.932.102	6.749.284	7.215.930	7.761.576	8.727.345	10.274.603	11.588.649
SMS (x 1,000)	2.080.763	1.838.890	1.692.681	1.440.031	1.386.259	1.316.488	1.178.447	1.061.956

Based on questions 1_A_3_2-3-4, 1_B_5_4-5-6, 1_B_6_4-5-6, 1_C_9_1-2-3, 1_D_3_1-2-3 and 1_D_4_1-2-3 of the Telecommonitor.

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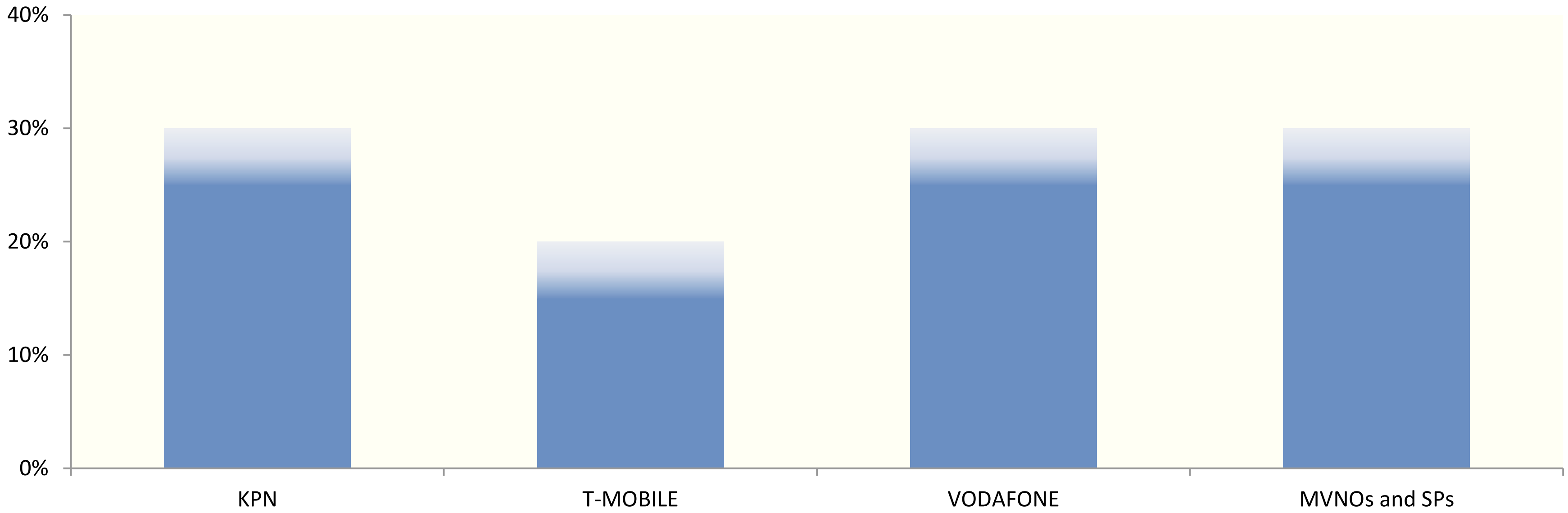
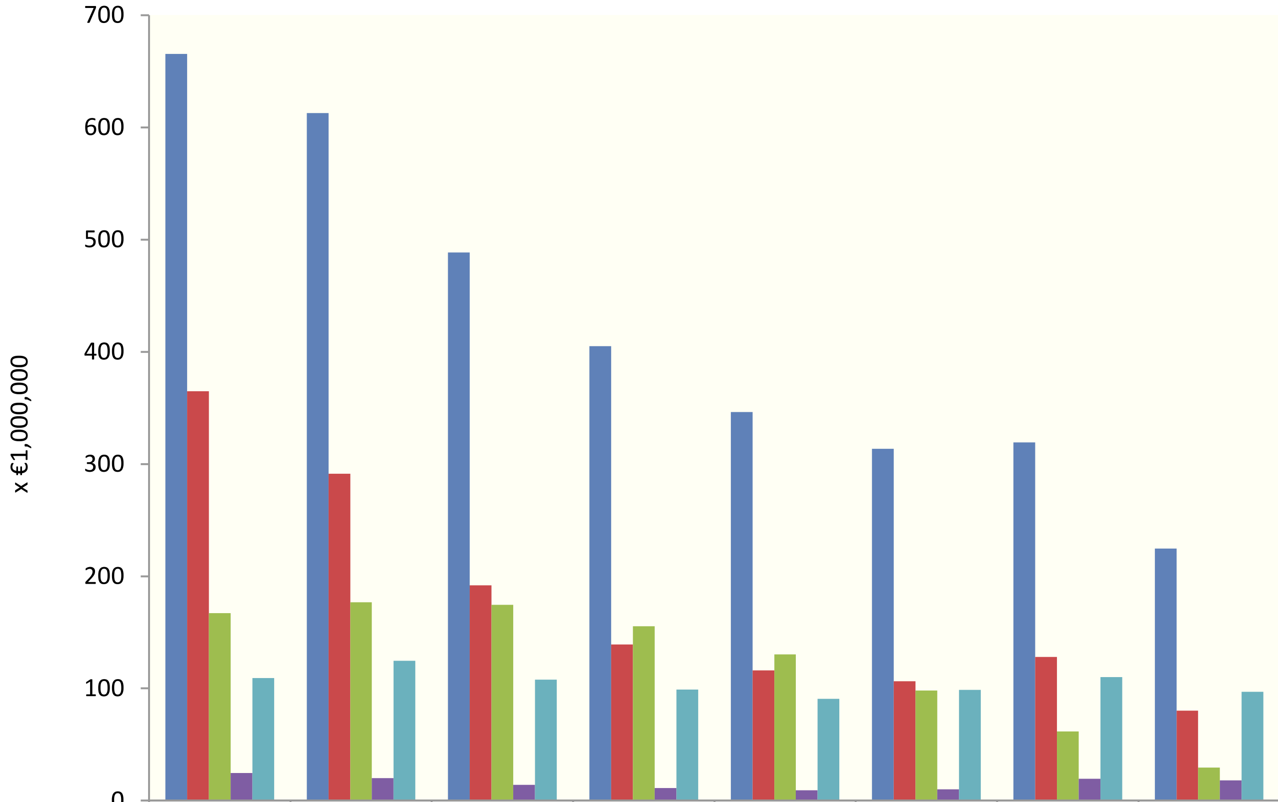
Mobile: Market shares based on total retail traffic volumes (2014Q1)



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
KPN	[30-35%]	[30-35%]	[30-35%]	[30-35%]	[30-35%]	[30-35%]	[25-30%]	[25-30%]
T-MOBILE	[20-25%]	[20-25%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]
VODAFONE	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[25-30%]	[25-30%]	[25-30%]	[25-30%]
MVNOs and SPs	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[25-30%]	[25-30%]	[25-30%]

Based on questions 1_A_3_2, 1_B_5_4, 1_C_9_1-2-3, 1_D_3_1, 1_B_6_4 and 1_D_4_1-2-3 of the Telecommonitor.

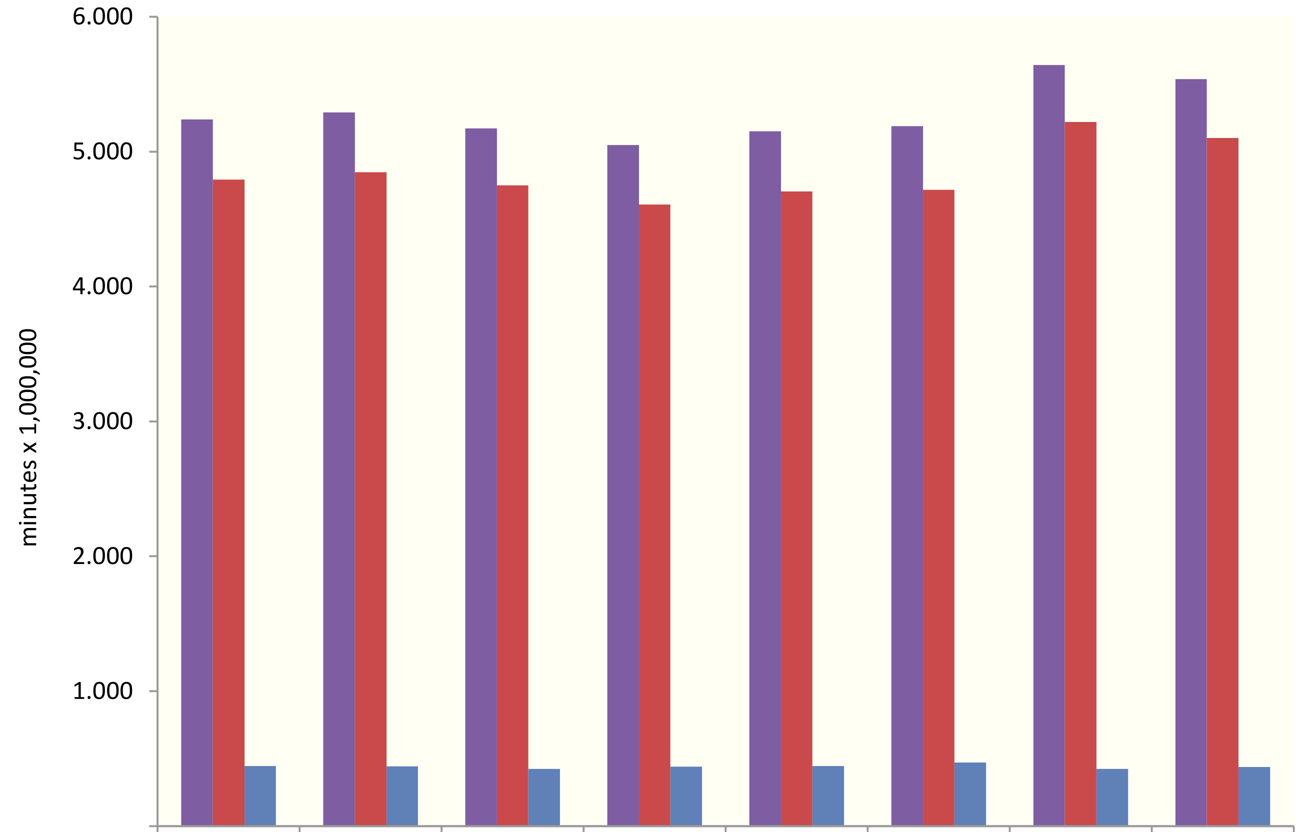
Mobile: Wholesale revenues terminating access



	30-6-2010	31-12-2010	30-6-2011	31-12-2011	30-6-2012	31-12-2012	30-6-2013	31-12-2013
Total wholesale revenues terminating access	666	613	489	405	346	313	319	225
Terminating revenues for national voice services	365	291	192	139	116	106	128	80
Terminating revenues for national non-voice services	167	177	175	155	130	98	62	29
Terminating revenues for international services	25	20	14	11	9	10	19	18
Revenues of services to SP's / MVNO's	109	125	108	99	91	99	110	97

Based on questions 1_C_6_1 through 1_C_6_3 of the Telecommonitor.

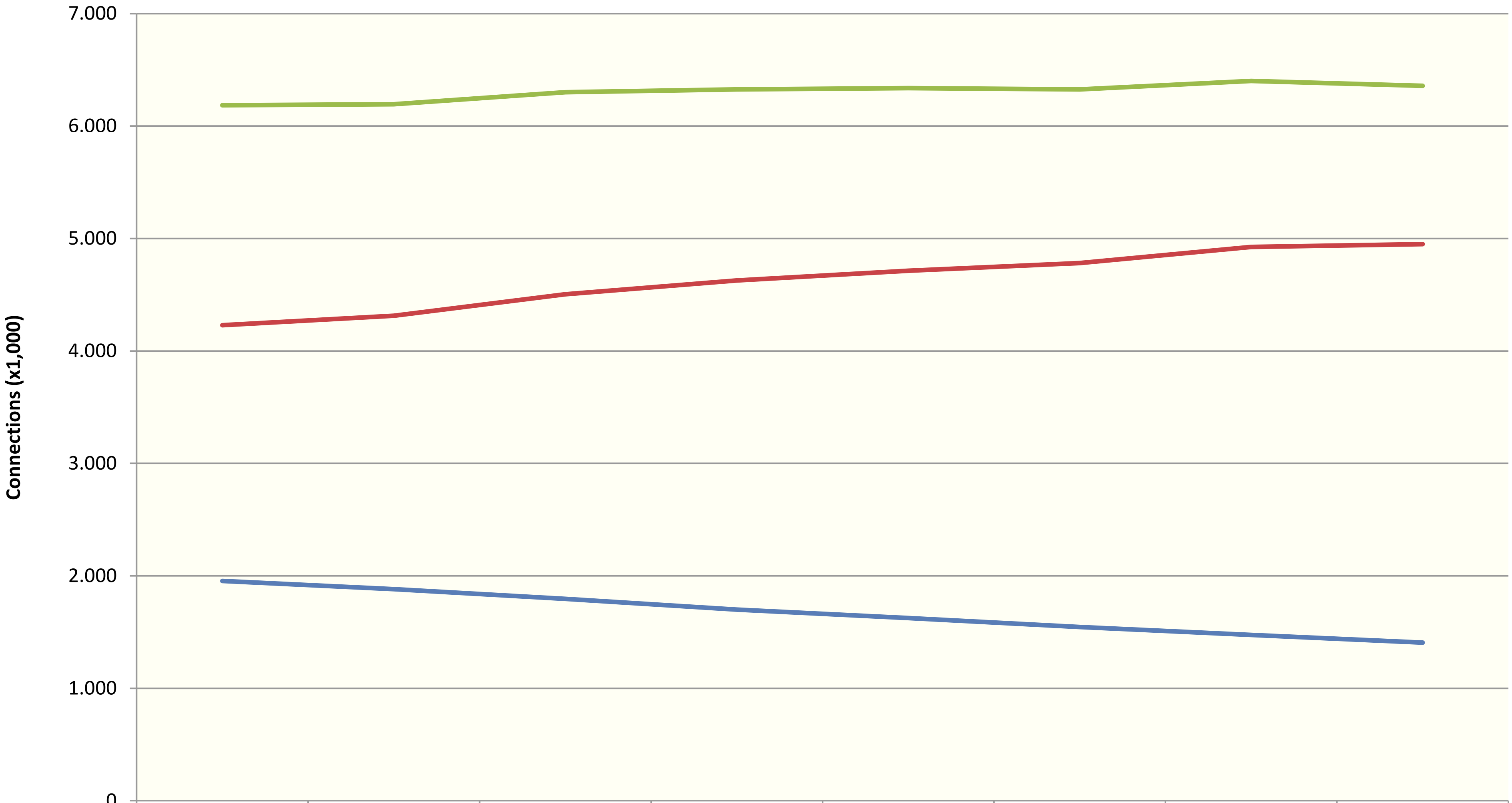
Mobile: Wholesale terminating access volume minutes (excl. on-net)



	30-6-2010	31-12-2010	30-6-2011	31-12-2011	30-6-2012	31-12-2012	30-6-2013	31-12-2013
Total volume of traffic terminated	5.238	5.291	5.173	5.049	5.151	5.188	5.642	5.539
Volume terminated from national networks	4.792	4.849	4.750	4.607	4.705	4.717	5.220	5.100
Volume terminated from abroad	446	442	423	441	446	471	423	438

Based on questions 1_C_8_1 through 1_C_8_3 of the Telecommonitor.

Fixed telephony: Number of retail singular connections



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
PSTN	1.955	1.881	1.795	1.700	1.625	1.545	1.476	1.407
VoB1	4.230	4.312	4.505	4.626	4.713	4.781	4.926	4.950
Singular	6.184	6.193	6.300	6.326	6.338	6.326	6.401	6.357

Based on questions 2_A2_1_1 and 2_A2_7_1 of the Telecommonitor.

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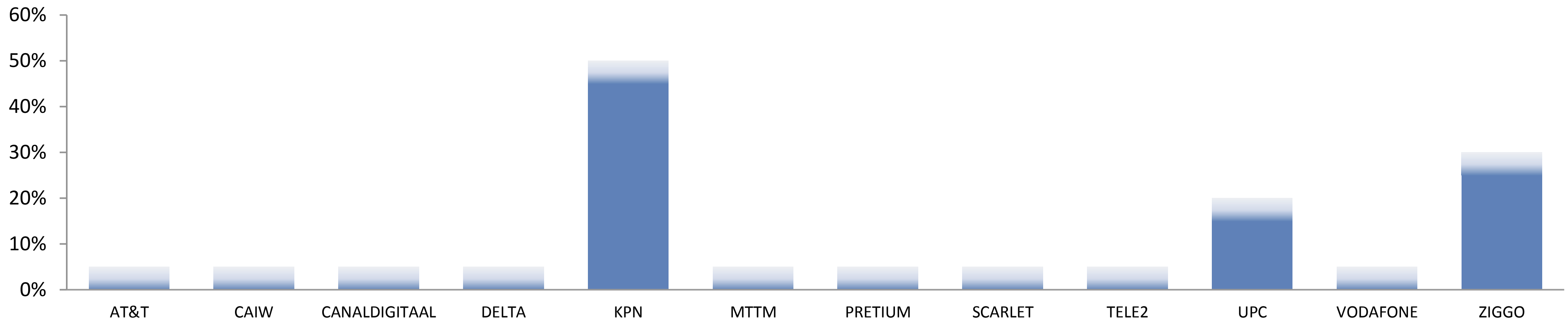
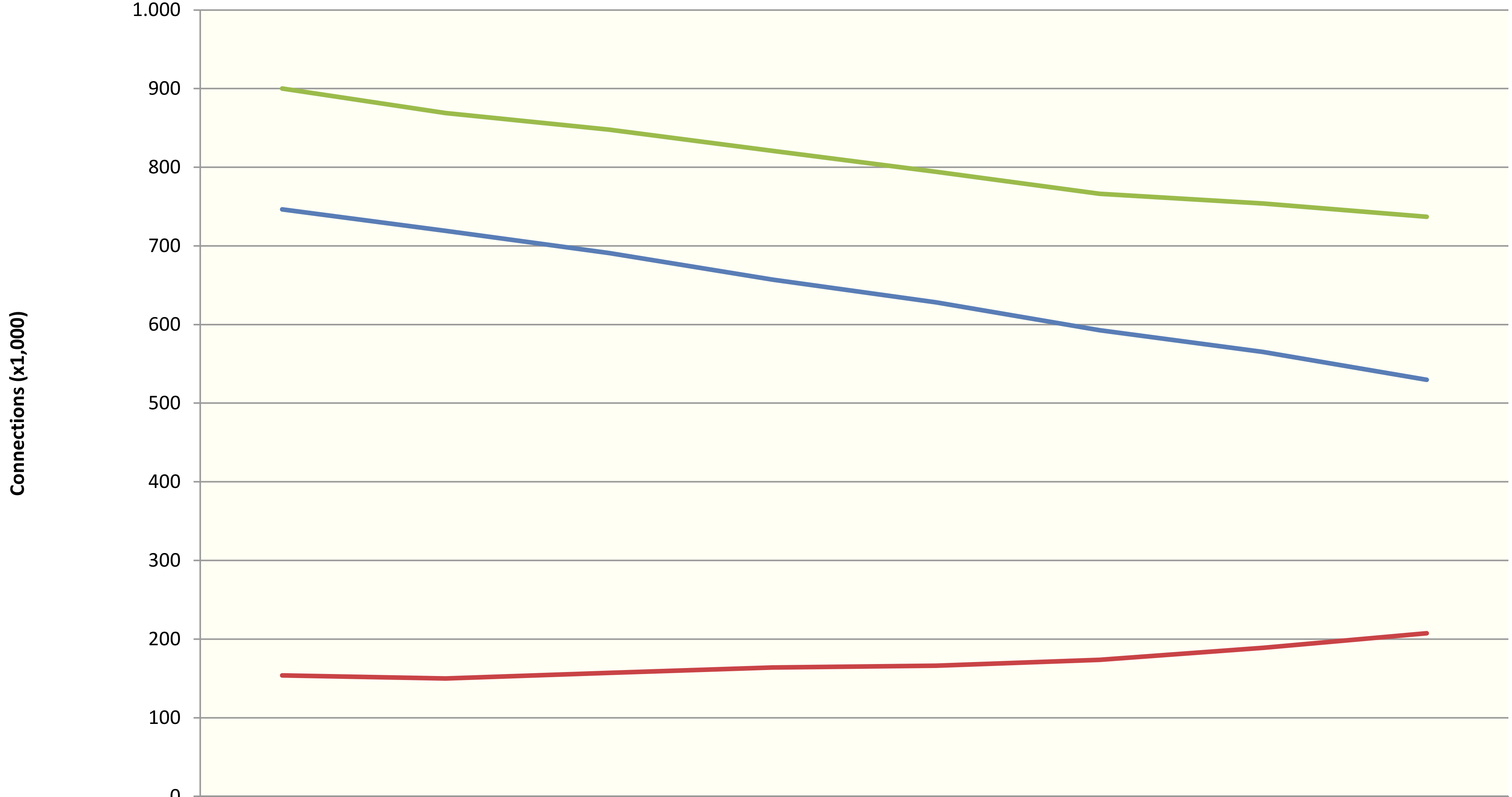
Fixed telephony: Market shares retail singular connections (2014Q1)



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
AT&T	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
CAIW	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
CANALDIGITAAL	-	-	-	-	-	-	-	[0-5%]
DELTA	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
ESPRIT	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	-	-	-
KPN	[45-50%]	[45-50%]	[45-50%]	[45-50%]	[45-50%]	[45-50%]	[45-50%]	[45-50%]
MTTM	-	-	-	-	-	-	[0-5%]	[0-5%]
PRETIUM	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
SCARLET	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
TELE2	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[0-5%]	[0-5%]
T-MOBILE	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	-
UPC	[10-15%]	[10-15%]	[10-15%]	[10-15%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]
VODAFONE	-	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
ZIGGO	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[25-30%]	[25-30%]	[25-30%]	[25-30%]

Based on questions 2_A2_1_1 and 2_A2_7_1 of the Telecommonitor.

Fixed telephony: Number of retail dual connections



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
ISDN1 & ISDN2	746	719	691	657	628	593	565	530
VoB2	154	150	157	164	166	174	189	207
Dual	900	869	848	821	794	766	754	737

Based on questions 2_A2_2_1, 2_A2_3_1 and 2_A2_8_1 of the Telecommonitor.

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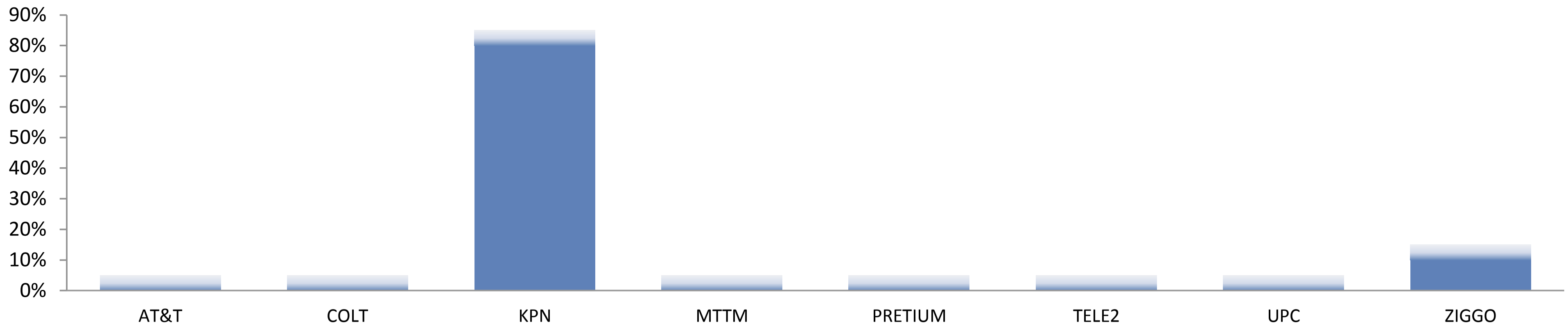
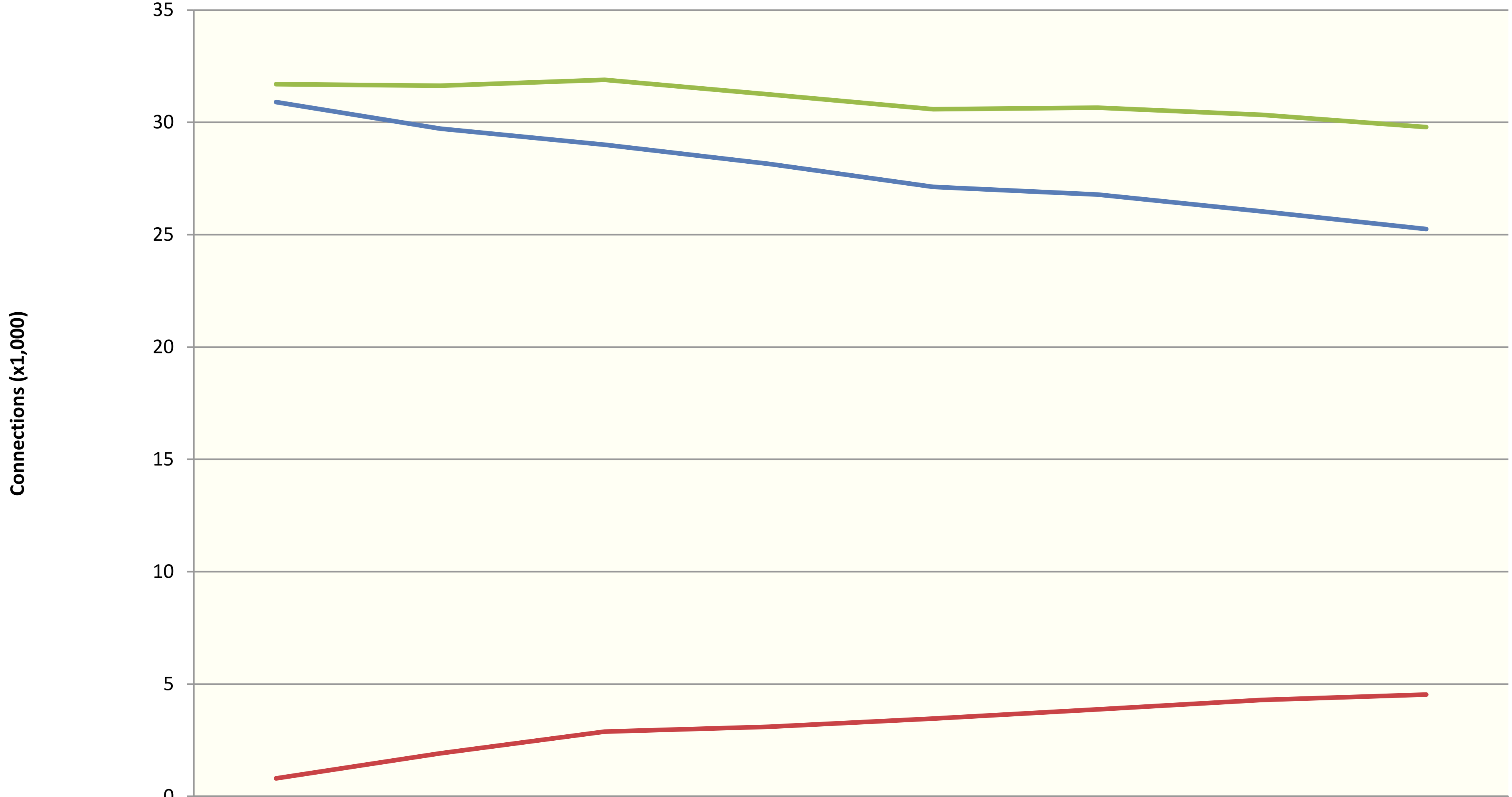
Fixed telephony: Market shares retail dual connections (2014Q1)



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
AT&T	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
COLT	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
ESPRIT	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	-	-	-
KPN	[85-90%]	[85-90%]	[85-90%]	[85-90%]	[85-90%]	[85-90%]	[80-85%]	[80-85%]
MTTM	-	-	-	-	-	-	[0-5%]	[0-5%]
PRETIUM	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
TELE2	[0-5%]	[0-5%]	[0-5%]	[5-10%]	[5-10%]	[0-5%]	[0-5%]	[0-5%]
UPC	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
ZIGGO	[0-5%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[10-15%]

Based on questions 2_A2_2_1, 2_A2_3_1 and 2_A2_8_1 of the Telecommonitor.

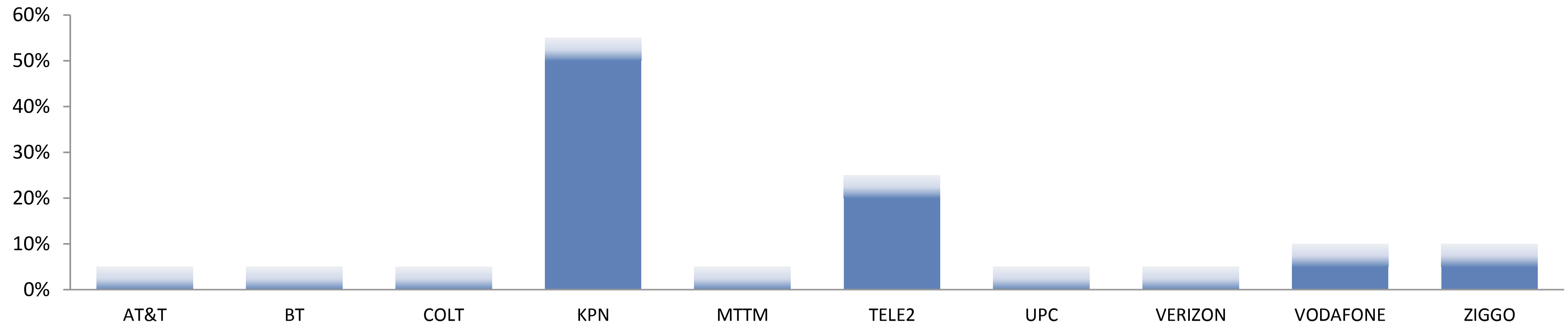
Fixed telephony: Number of retail multiple connections



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
ISDN15/20/30	31	30	29	28	27	27	26	25
VoBn	1	2	3	3	3	4	4	5
Multiple	32	32	32	31	31	31	30	30

Based on questions 2_A2_4_1, 2_A2_5_1, 2_A2_6_1 and 2_A2_9_1 of the Telecommonitor.

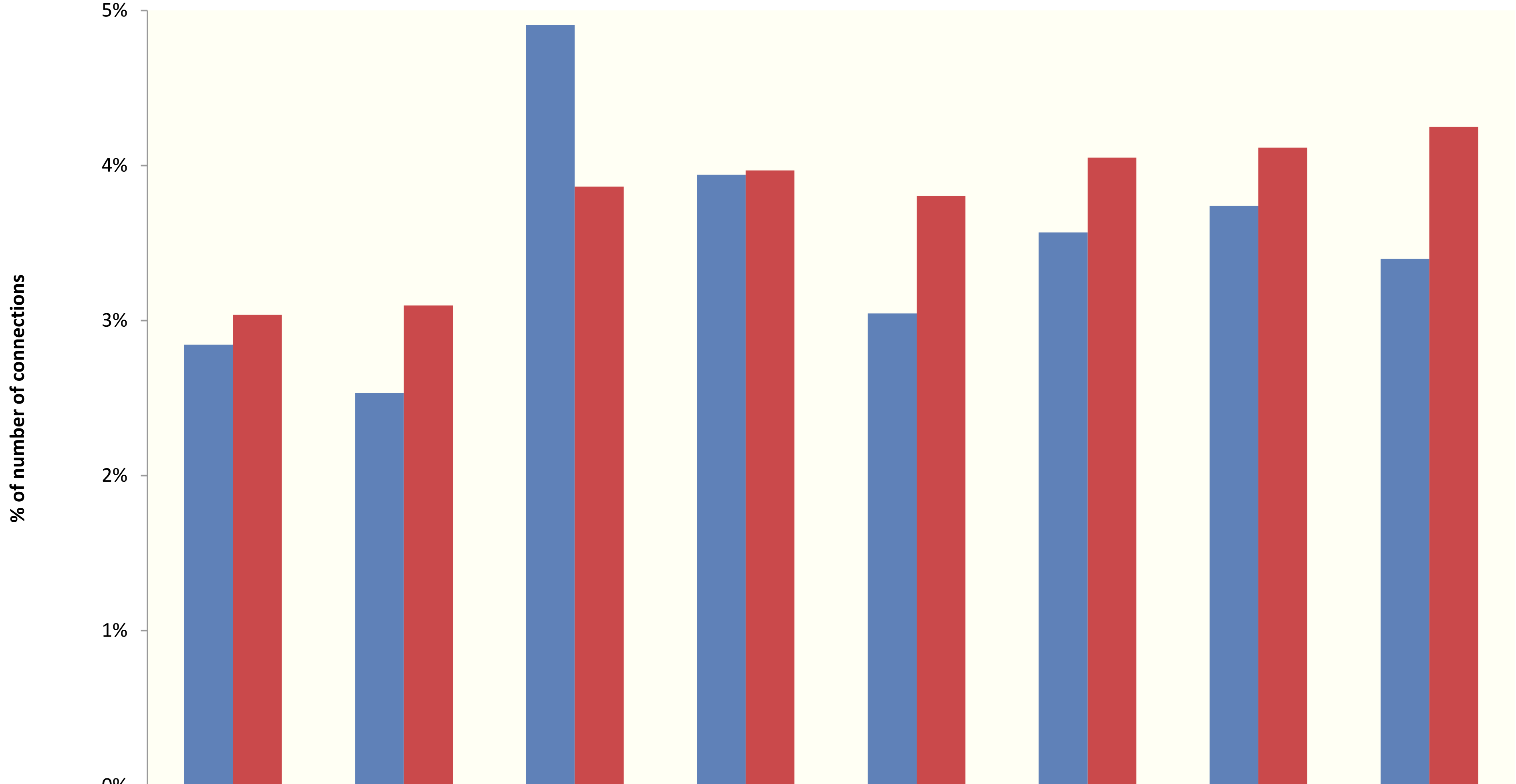
Fixed telephony: Market shares retail multiple connections (2014Q1)



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
AT&T	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
BT	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
COLT	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
ESPRIT	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	-	-	-
KPN	[55-60%]	[55-60%]	[50-55%]	[50-55%]	[50-55%]	[50-55%]	[50-55%]	[50-55%]
MTTM	-	-	-	-	-	-	[0-5%]	[0-5%]
TELE2	[15-20%]	[15-20%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]
UPC	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[0-5%]
VERIZON	[0-5%]	[5-10%]	[5-10%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
VODAFONE	-	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[5-10%]	[5-10%]
ZIGGO	[5-10%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[5-10%]	[5-10%]	[5-10%]

Based on questions 2_A2_4_1, 2_A2_5_1, 2_A2_6_1 and 2_A2_9_1 of the Telecommonitor.

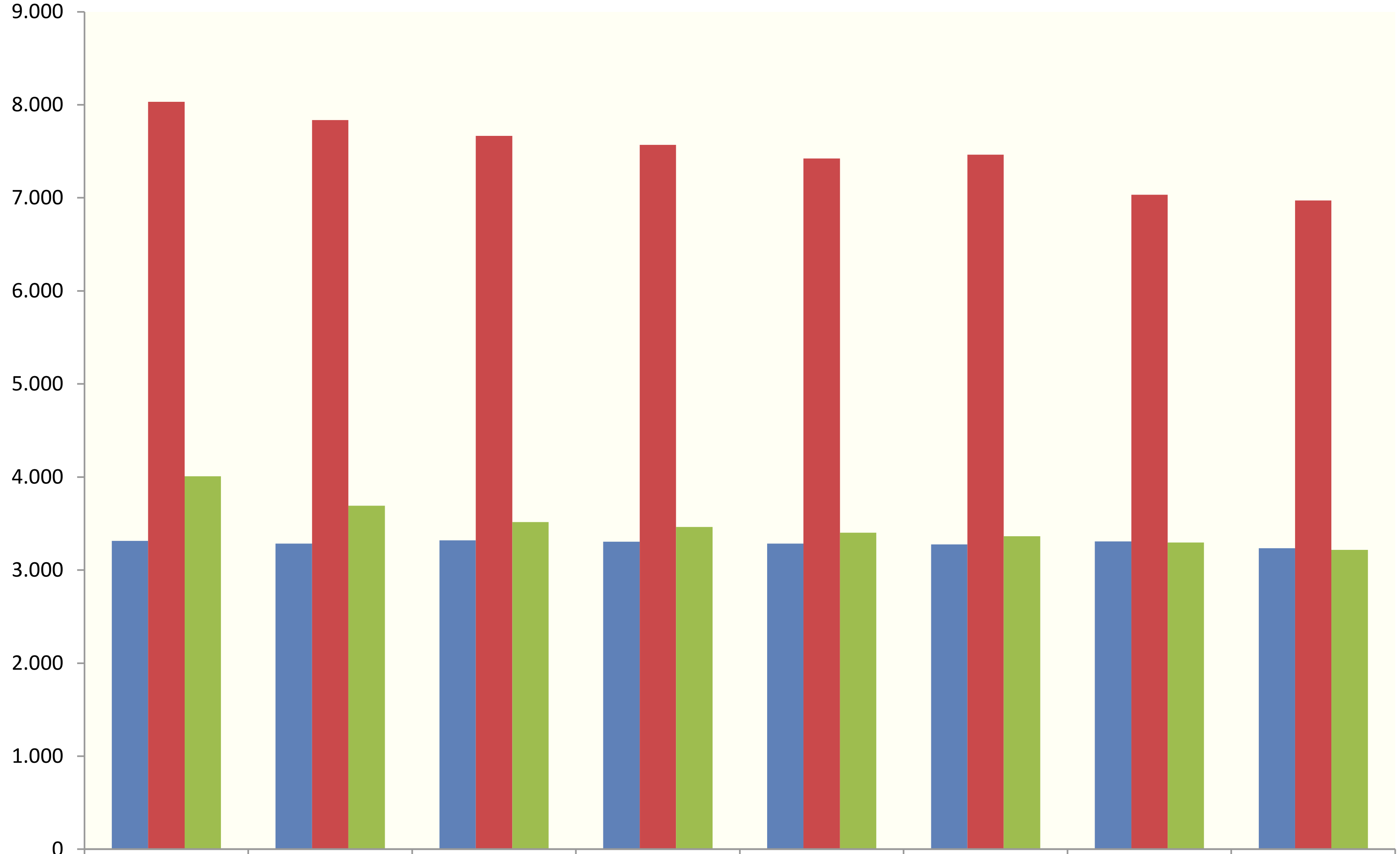
Fixed telephony: Churn based on number of retail connections (single, dual and multiple)



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
Adds	2,8%	2,5%	4,9%	3,9%	3,0%	3,6%	3,7%	3,4%
Disconnects	3,0%	3,1%	3,9%	4,0%	3,8%	4,1%	4,1%	4,2%

Based on questions 2_A3_5,6,7,8_1,_2 and 2_A4_1-9_1-2 of the Telecommonitor.

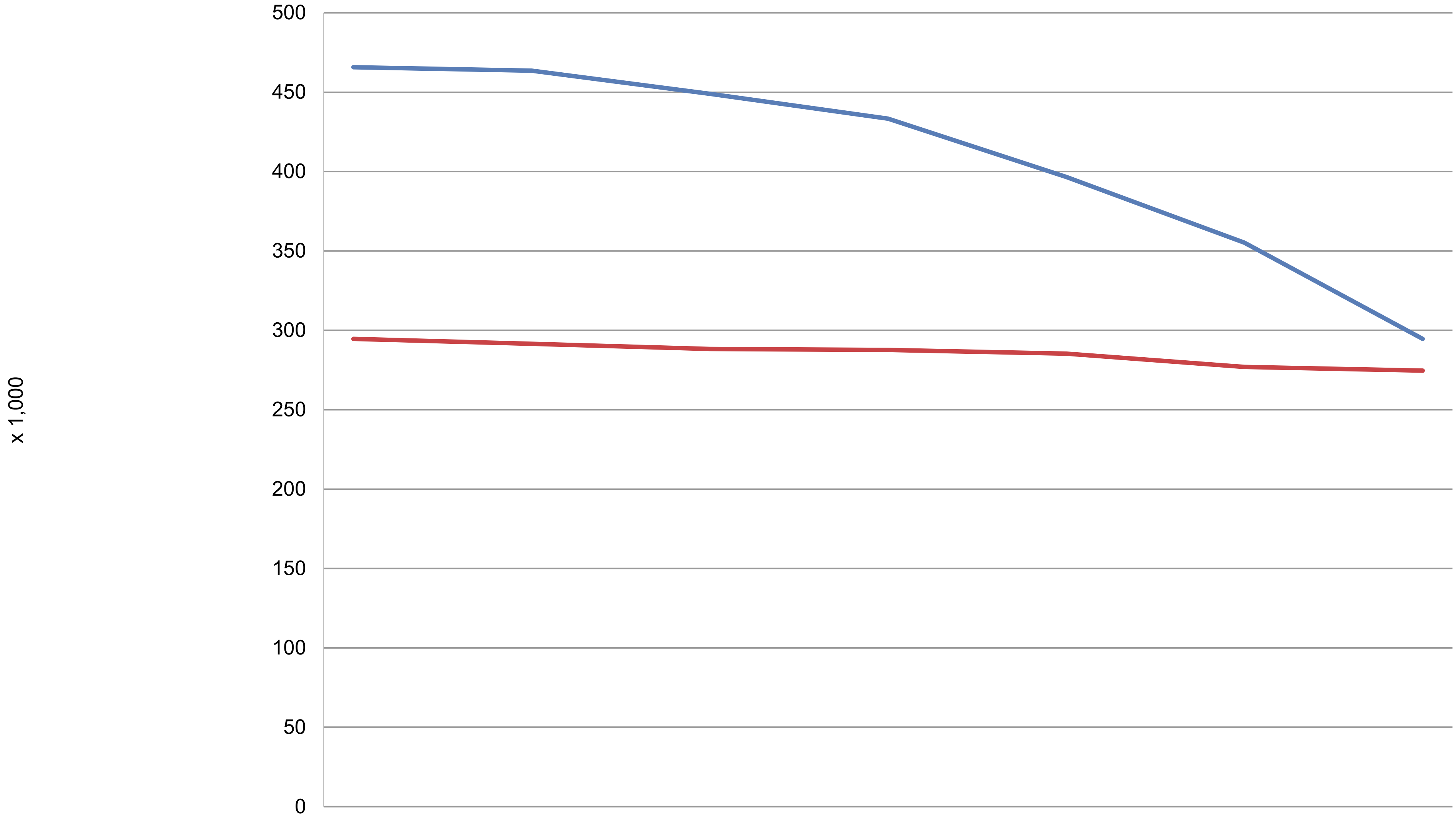
Fixed telephony: Herfindahl-Hirschman Index of retail lines



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
HHI single lines	3.314	3.286	3.321	3.306	3.286	3.275	3.308	3.236
HHI dual lines	8.032	7.837	7.667	7.570	7.423	7.465	7.032	6.971
HHI multiple lines	4.007	3.693	3.517	3.462	3.402	3.364	3.296	3.218

Based on questions 2_A2_1-9_1 of the Telecommonitor.

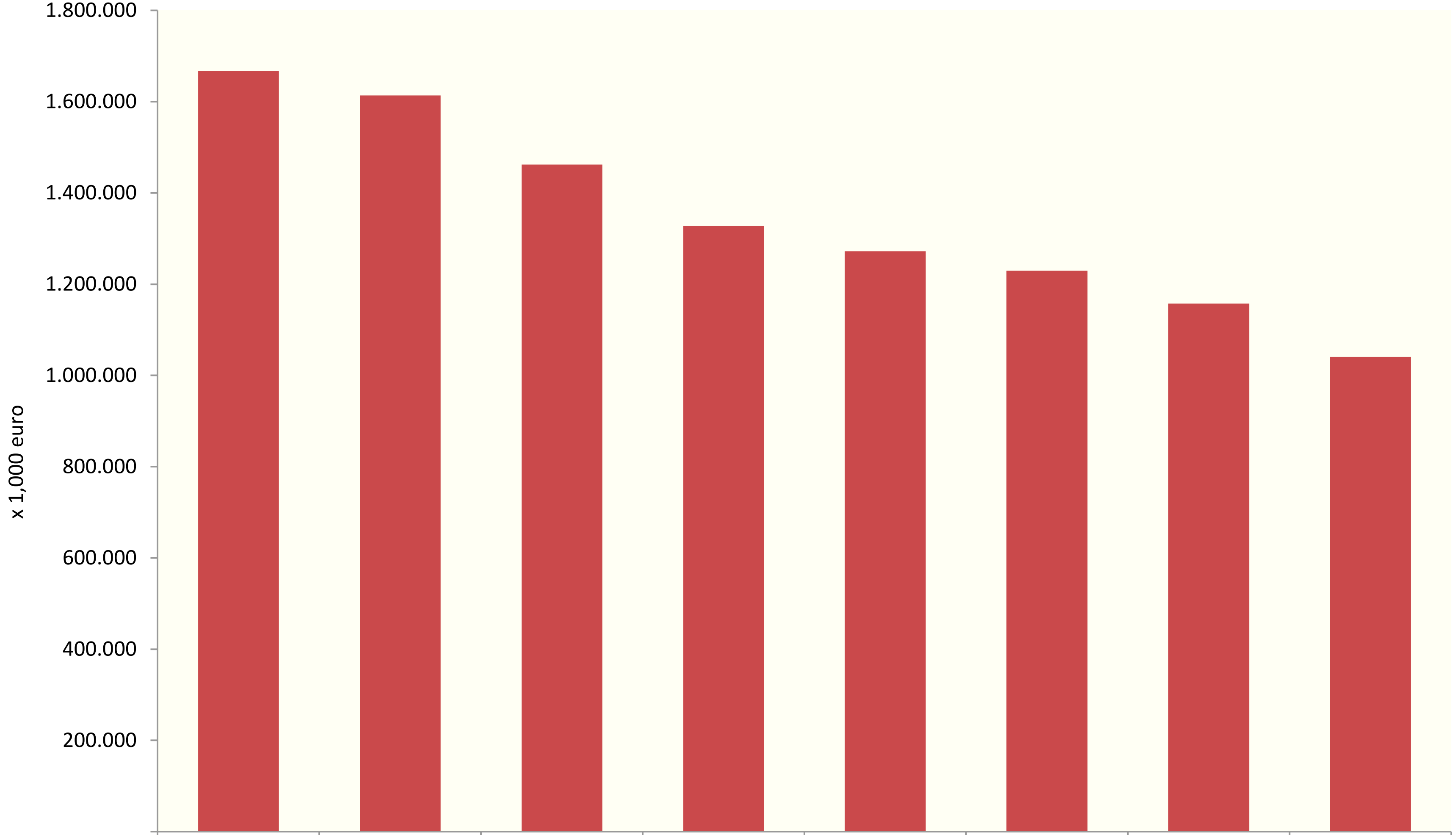
Fixed telephony: Number of WLR lines and CPS subscribers



	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
Number of CPS subscribers	466	464	449	433	397	355	295
Number of wholesale line rental lines	295	292	288	288	285	277	275

Based on questions 2_B_9_1, 2_E_14_1 and en 2_E_15_1 till 2_E_15_6 of the Telecommonitor.

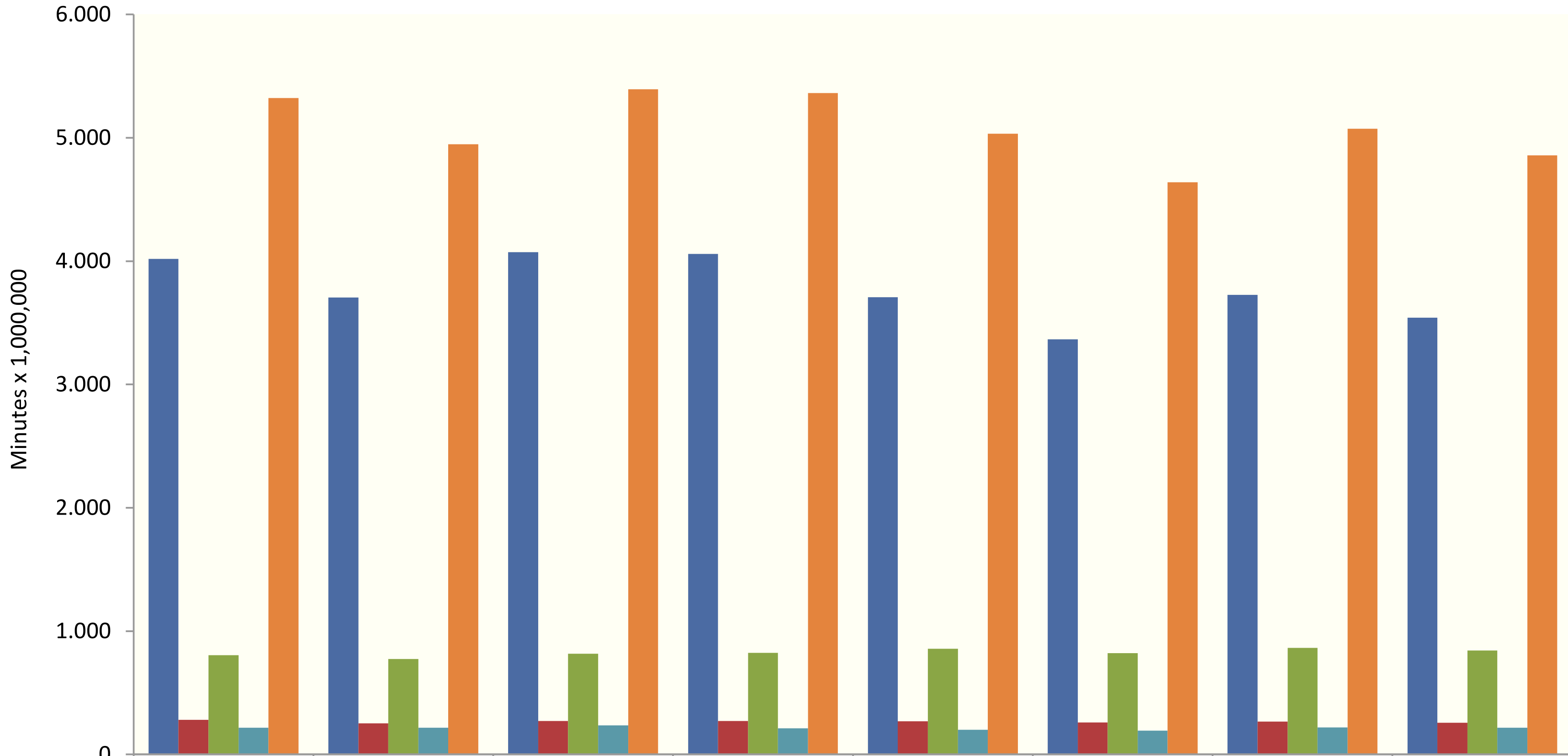
Fixed telephony: Annual retail revenues PSTN + VoB lines



	31-12-2006	31-12-2007	31-12-2008	31-12-2009	31-12-2010	31-12-2011	31-12-2012	31-12-2013
Revenues lines	1.667.623	1.613.981	1.462.311	1.327.285	1.272.332	1.229.487	1.157.429	1.040.576

Based on questions 2_A1_1_1, 2_A1_1_2 and 2_A1_1_3 of the Telecommonitor.

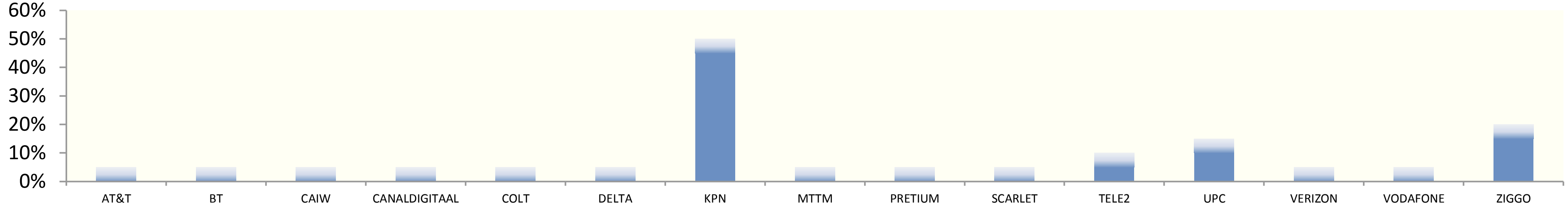
Fixed telephony: Total retail traffic in minutes



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
Local and national	4.019	3.705	4.073	4.059	3.708	3.367	3.726	3.542
International	281	253	270	270	269	259	265	257
Fixed-mobile	806	774	815	824	857	820	864	843
Other	217	216	234	211	199	193	218	216
Total volume	5.322	4.949	5.393	5.364	5.033	4.639	5.073	4.858

ased on questions 2_C2_11_1 till 2_C2_11_5 of the Telecommonitor.

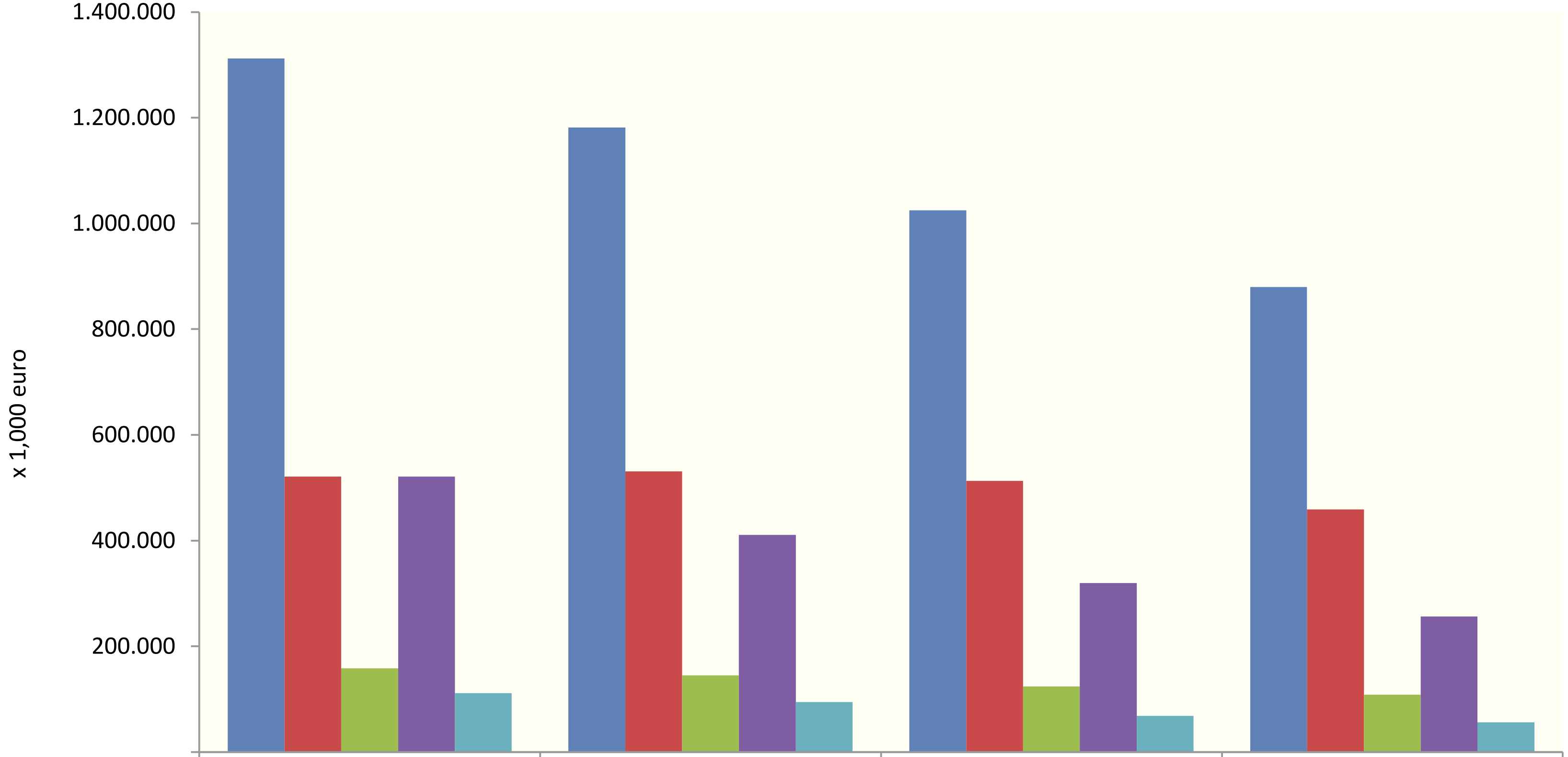
Fixed telephony: Market shares based on retail traffic (2014Q1)



	31-3-2012	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013
AT&T	-	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
BT	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
CAIW	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
COLT	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
DELTA	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
ESPRIT	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	-	-
KPN	[50-55%]	[45-50%]	[45-50%]	[45-50%]	[45-50%]	[45-50%]	[45-50%]	[45-50%]
MTTM	-	-	-	-	-	-	-	[0-5%]
PRETIUM	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
SCARLET	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
TELE2	[10-15%]	[10-15%]	[10-15%]	[10-15%]	[5-10%]	[10-15%]	[5-10%]	[5-10%]
T-MOBILE	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
UPC	[10-15%]	[10-15%]	[10-15%]	[10-15%]	[10-15%]	[10-15%]	[10-15%]	[10-15%]
VERIZON	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
VODAFON	-	-	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
ZIGGO	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]

Based on questions 2_C2_11_1 till 2_C2_11_5 of the Telecommonitor.

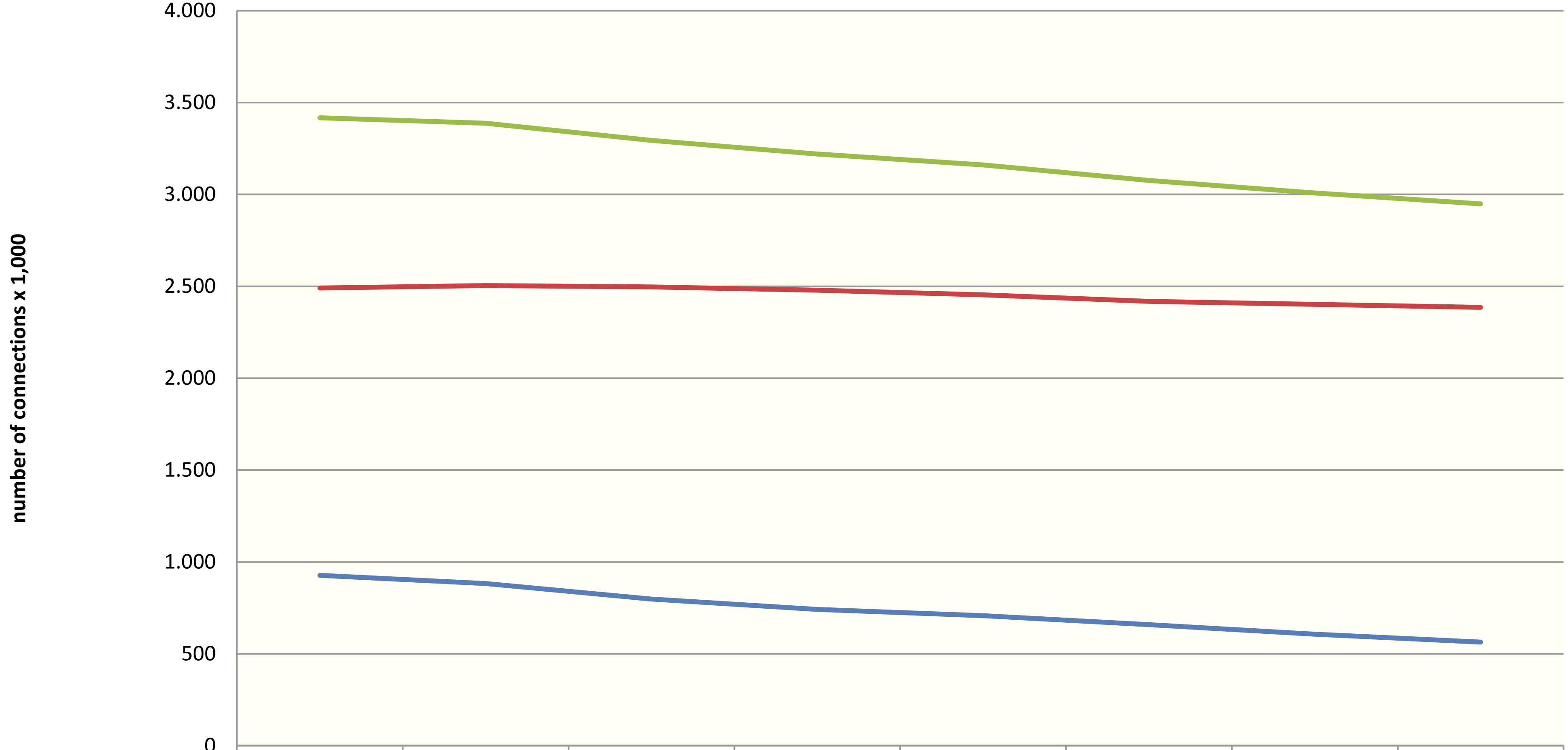
Fixed telephony: Annual revenues retail traffic



	31-12-2010	31-12-2011	31-12-2012	31-12-2013
Total revenues traffic	1.312.056	1.181.429	1.024.982	879.780
Revenues local and national traffic	520.856	530.935	512.706	458.889
Revenues international traffic	158.399	145.061	123.978	108.541
Revenues fixed-to-mobile traffic	521.279	410.704	319.829	256.242
Other traffic revenues	111.521	94.730	68.470	56.108

Based on questions 2_C2_10_1 till 2_C2_10_5 of the Telecommonitor.

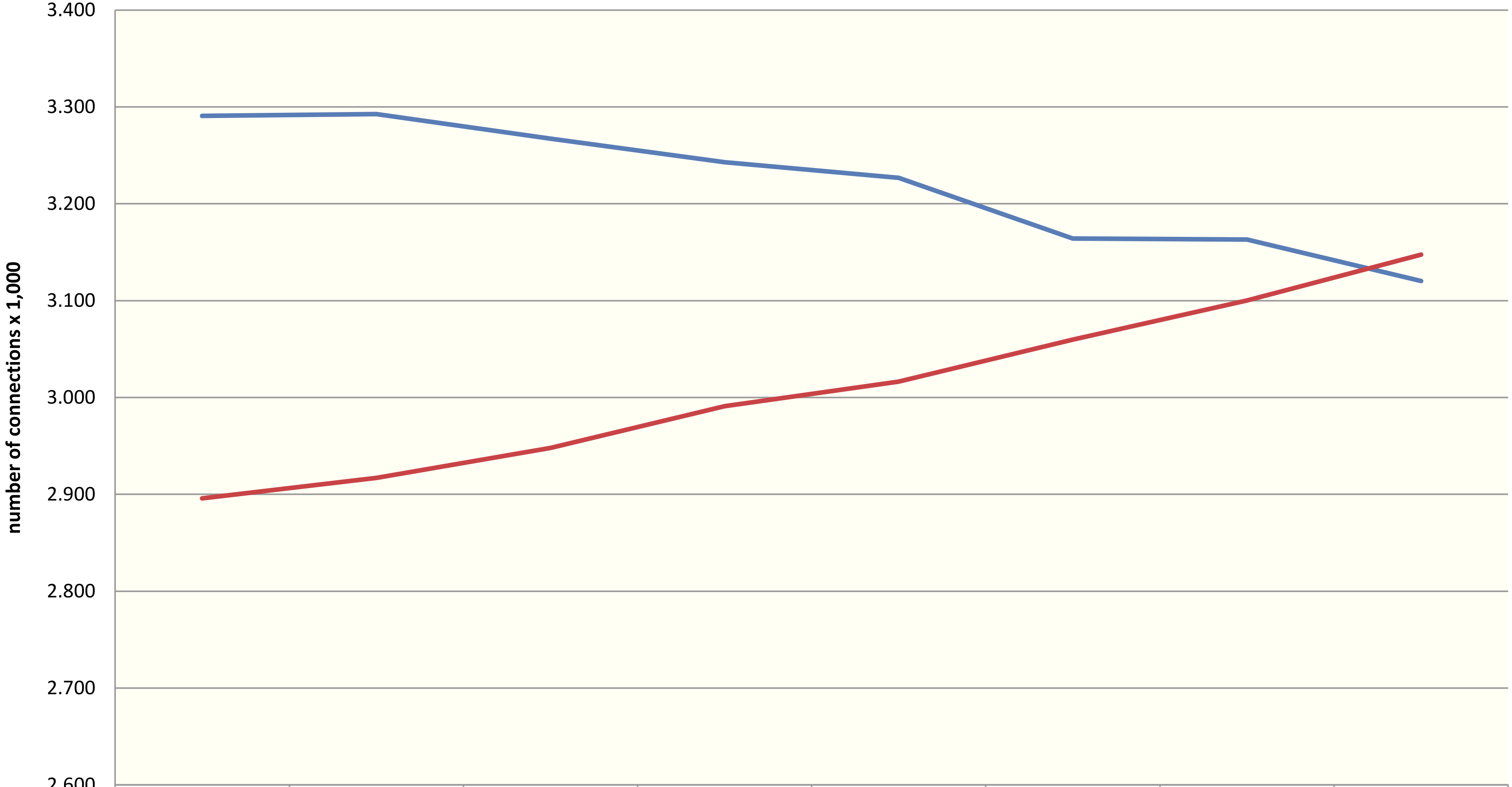
Broadband: unbundled MDF connections per type



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
Shared lines	927	883	798	741	707	658	606	563
Fully unbundled	2.490	2.505	2.497	2.479	2.454	2.418	2.402	2.386
Total	3.418	3.388	3.295	3.220	3.161	3.076	3.008	2.949

Based on questions 3_A1_1_1, 3_A1_1_2 and 3_A1_1_3 of the Telecommonitor.

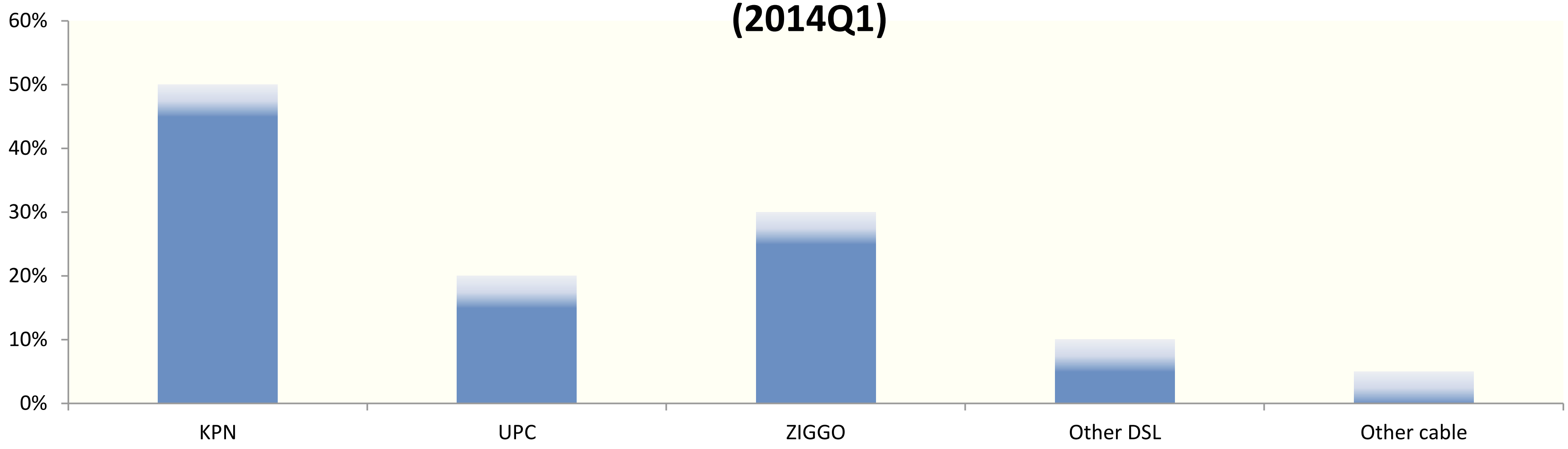
Broadband: WBT low quality connections per type of infrastructure - including self supply



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
DSL	3.291	3.293	3.267	3.243	3.227	3.164	3.163	3.120
Cable	2.896	2.917	2.948	2.991	3.016	3.060	3.100	3.148

Based on questions 3_A3_5_1-2-3-4-5 and 3_A3_6_1-2-3-4 of the Telecommonitor.

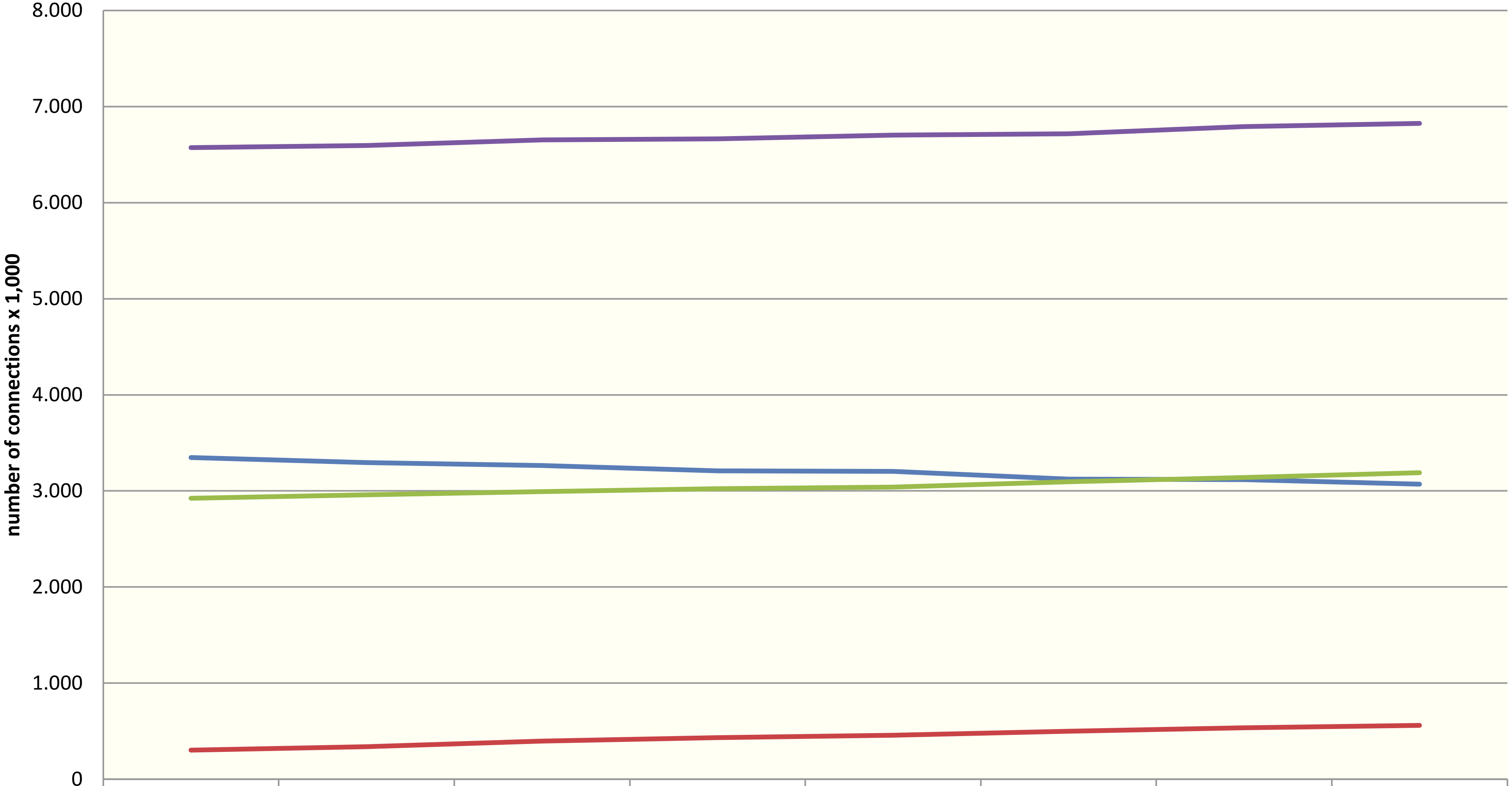
Broadband: marketshare WBT low quality per party - including self supply (2014Q1)



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
KPN	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
UPC	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]
ZIGGO	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
Other DSL	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
Other cable	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]

Based on questions 3_A3_5_1-2-3-4-5 and 3_A3_6_1-2-3-4 of the Telecommonitor.

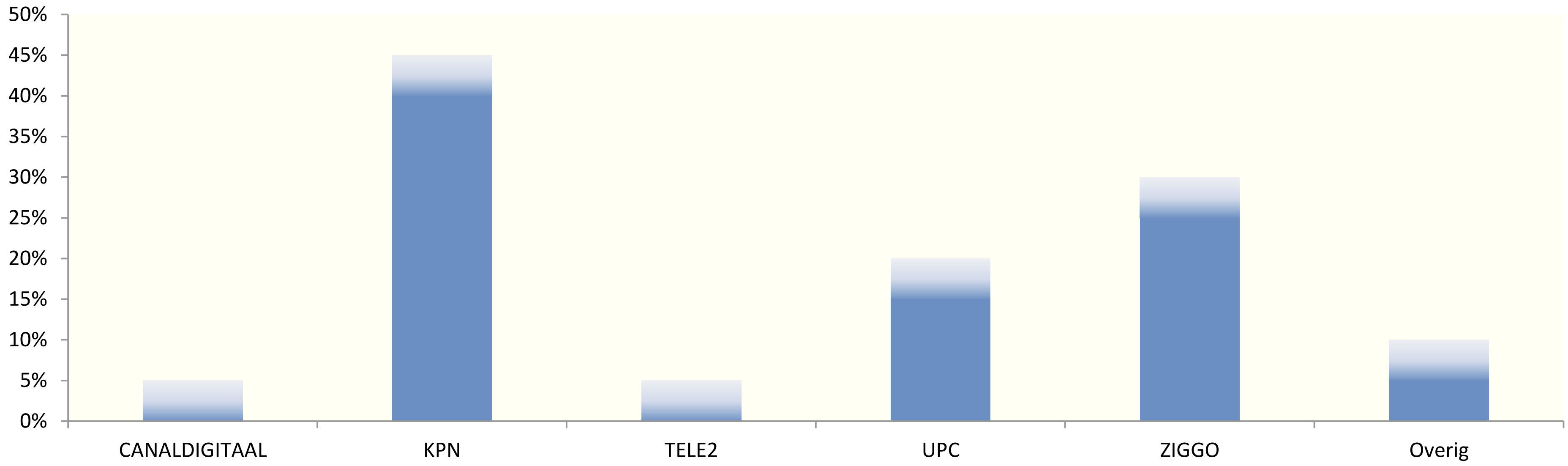
Broadband: retail connections per type



	30-06-2012	30-09-2012	31-12-2012	31-03-2013	30-06-2013	30-09-2013	31-12-2013	31-03-2014
DSL	3.347	3.295	3.264	3.208	3.204	3.122	3.118	3.071
Fiber	302	340	396	432	457	500	535	561
Cable	2.924	2.958	2.992	3.024	3.040	3.095	3.139	3.191
Total	6.573	6.594	6.652	6.663	6.701	6.717	6.792	6.824

Based on questions 3_A1_3_1-3, 3_A3_5_1-2-3-4 and 3_B_8_1-2-3-5 of the Telecommonitor.

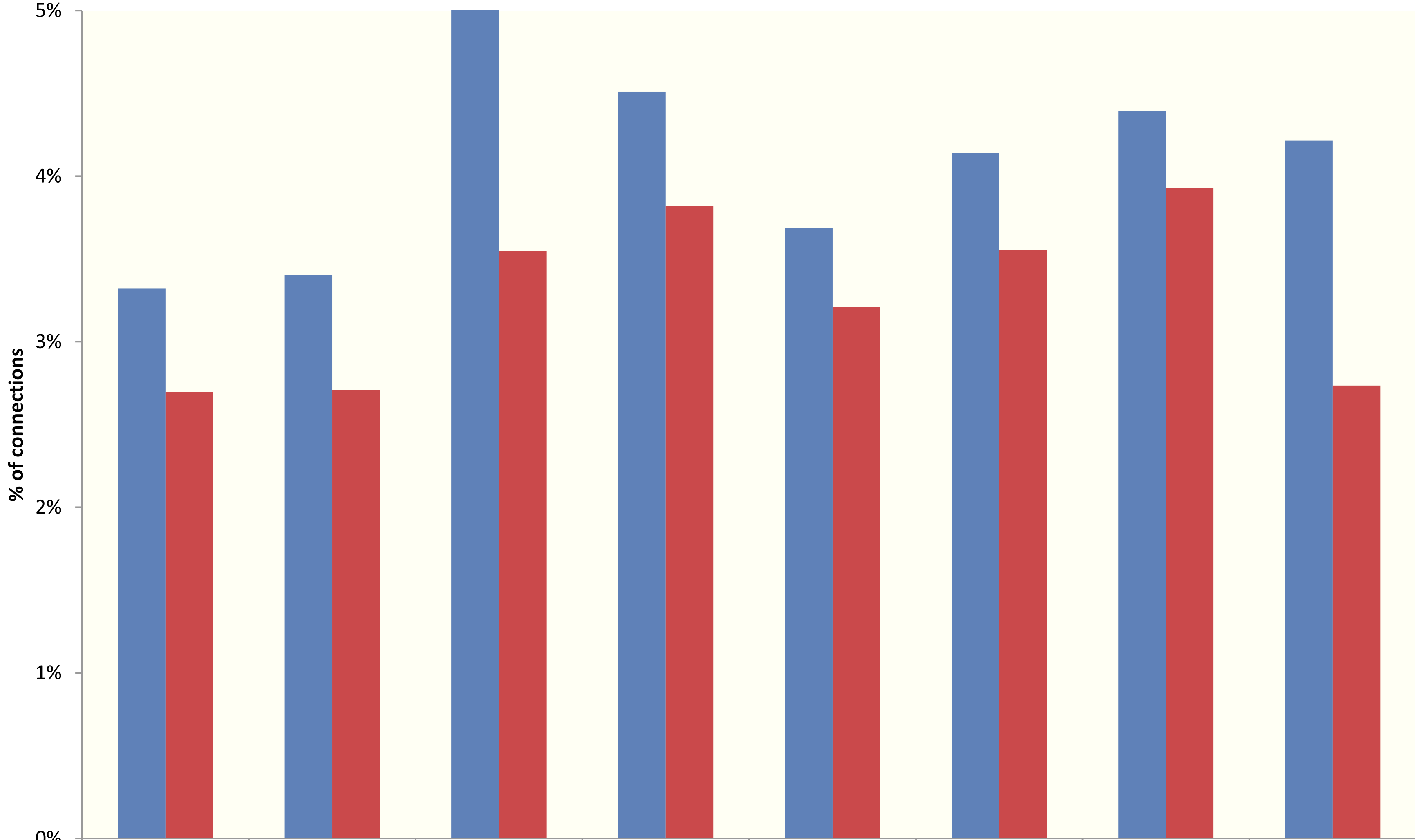
Breedband: marktaandeel retail per partij (2014Q1)



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
CANALDIGITAAL	-	-	-	-	-	-	-	[0 - 5%]
KPN	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
TELE2	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[0 - 5%]	[0 - 5%]
T-MOBILE	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	-
UPC	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]
ZIGGO	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
Overig	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[0 - 5%]	[5 - 10%]	[5 - 10%]

Op basis van vragen 3_A1_3_1, 3_A1_3_3, 3_A3_5_1-2-3-4 en 3_B_8_1-2-3-5 van de Telecommonitor.

Broadband: Churn based on retail connections

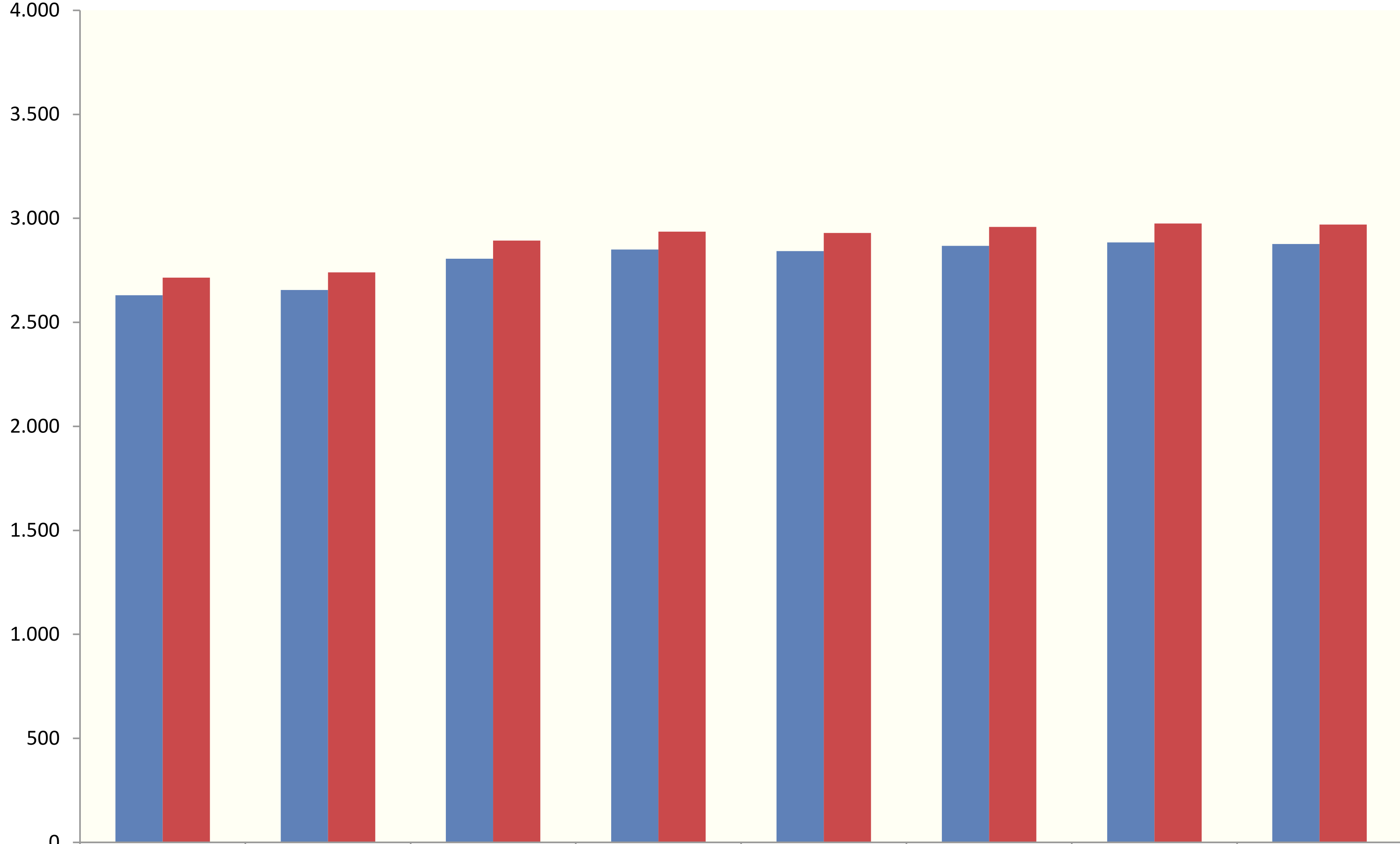


	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
Adds	3,3%	3,4%	6,1%	4,5%	3,7%	4,1%	4,4%	4,2%
Disconnects	2,7%	2,7%	3,5%	3,8%	3,2%	3,6%	3,9%	2,7%

Based on questions 3_E_13_1 and 3_E_13_2 of the Telecommonitor.

Authority for Consumers & Markets

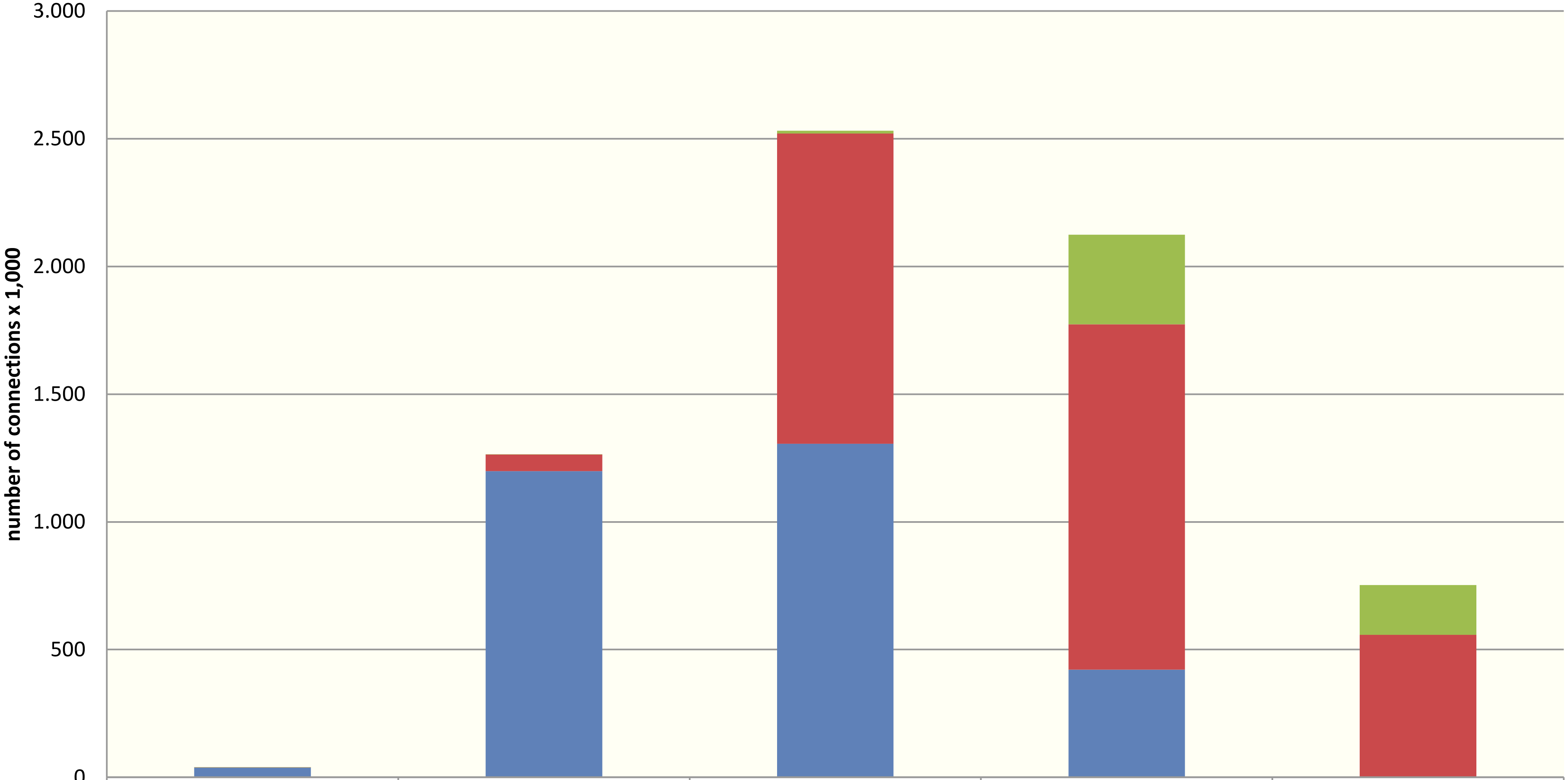
Broadband: HHI based on retailconnections broadband



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
HHI	2.630	2.655	2.806	2.850	2.842	2.868	2.884	2.877
HHI - cable as 1	2.715	2.741	2.893	2.936	2.930	2.958	2.975	2.970

Based on questions 3_A1_3_1-3, 3_A3_5_1-2-3-4 and 3_B_8_1-2-3-5 from the Telecommonitor.

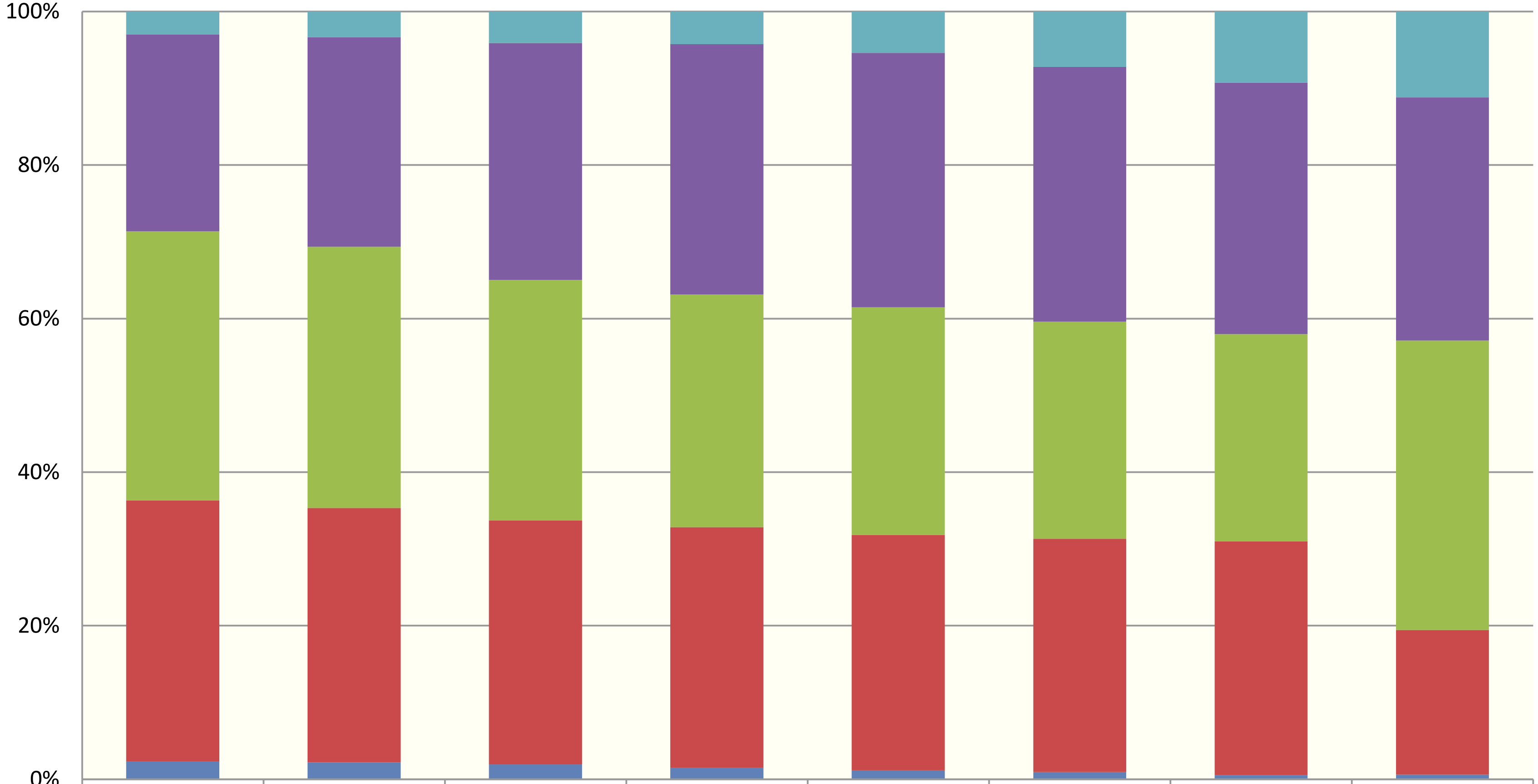
Broadband: retail connections by speed and infrastructure (2014Q1) (Excluding wholesale supplies)



	< 2 Mbps	≥ 2Mbps, < 10Mbps	≥ 10Mbps, < 30Mbps	≥ 30Mbps, < 100Mbps	≥ 100Mbps
Fiber	0	2	10	350	195
Cable	0	65	1.215	1.353	558
DSL	38	1.198	1.306	421	0

Based on questions 3_B1_8_1-5, 3_B2_8_1-5 and 3_B3_8_1-5 of the Telecommonitor.

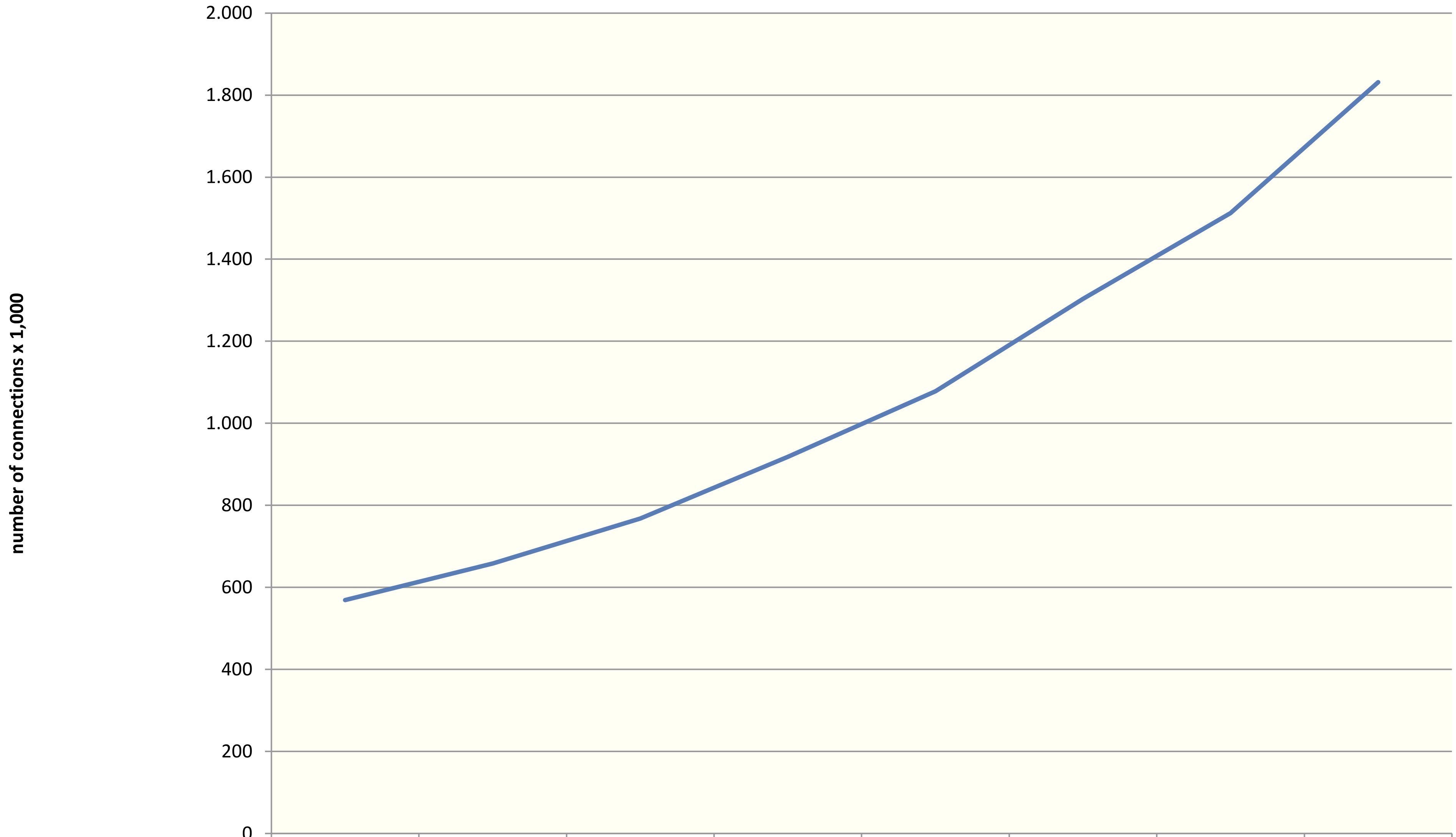
Broadband: retail connections by speed (Excluding wholesale supplies)



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
≥ 100Mbps	3%	3%	4%	4%	5%	7%	9%	11%
≥ 30Mbps, < 100Mbps	26%	27%	31%	33%	33%	33%	33%	32%
≥ 10Mbps, < 30Mbps	35%	34%	31%	30%	30%	28%	27%	38%
≥ 2Mbps, < 10Mbps	34%	33%	32%	31%	31%	30%	30%	19%
< 2 Mbps	2%	2%	2%	1%	1%	1%	1%	1%

Based on questions 3_B1_8_1-5, 3_B2_8_1-5 and 3_B3_8_1-5 of the Telecommonitor.

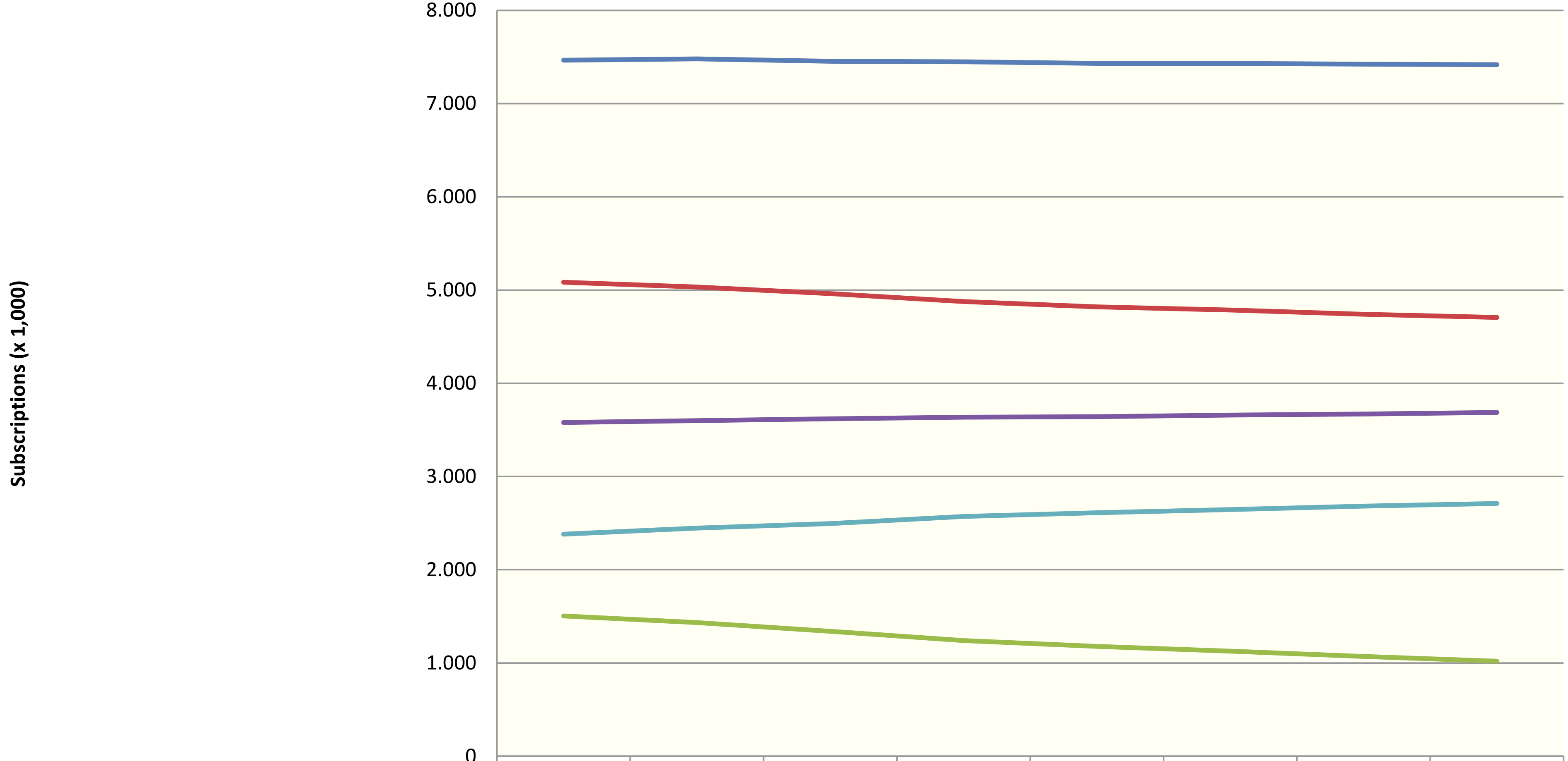
Broadband: homes connected (FttH)



	30-6-2010	31-12-2010	30-6-2011	31-12-2011	30-6-2012	31-12-2012	30-6-2013	31-12-2013
Homes connected (FttH)	569	658	768	918	1.078	1.303	1.512	1.832

Based on question 3_C_9_4 from the Telecommonitor.

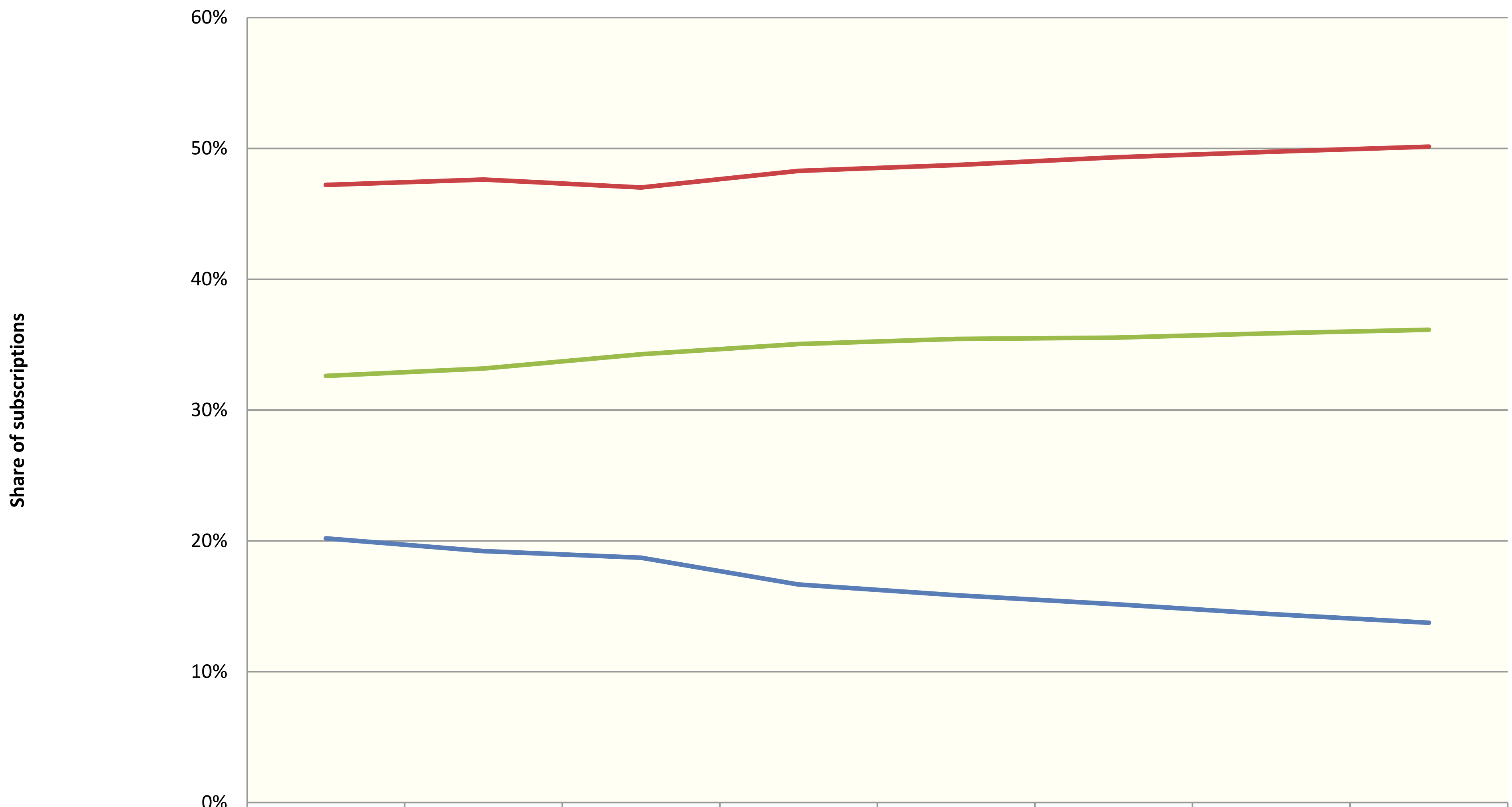
Television: subscriptions (standard package, national level)



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
Total - television subscriptions	7.465	7.480	7.455	7.450	7.431	7.432	7.424	7.417
Cable - total subscriptions	5.083	5.033	4.961	4.878	4.820	4.785	4.740	4.705
Cable - analogue subscriptions	1.504	1.434	1.341	1.242	1.177	1.127	1.069	1.018
Cable - digital subscriptions	3.579	3.599	3.620	3.636	3.643	3.658	3.671	3.687
Other subscriptions (DVB-T, DSL, FttH, satellite)	2.383	2.447	2.494	2.572	2.611	2.646	2.683	2.711

Based on questions 5_A_1_*_* of the Telecommonitor.

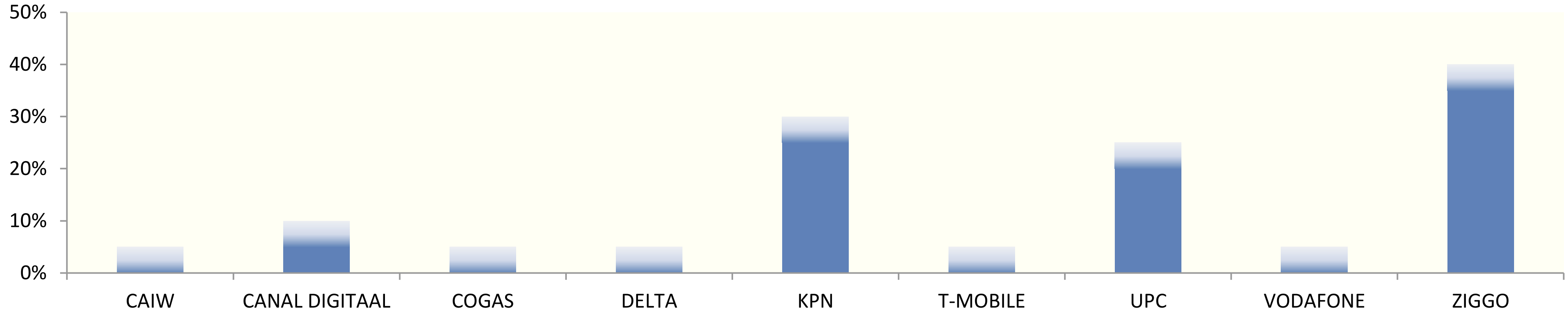
Television: digitization of subscriptions



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
Analogue only	20%	19%	19%	17%	16%	15%	14%	14%
Digital and analogue	47%	48%	47%	48%	49%	49%	50%	50%
Digital only	33%	33%	34%	35%	35%	36%	36%	36%

Based on questions 5_A_1_*_* of the Telecommonitor.

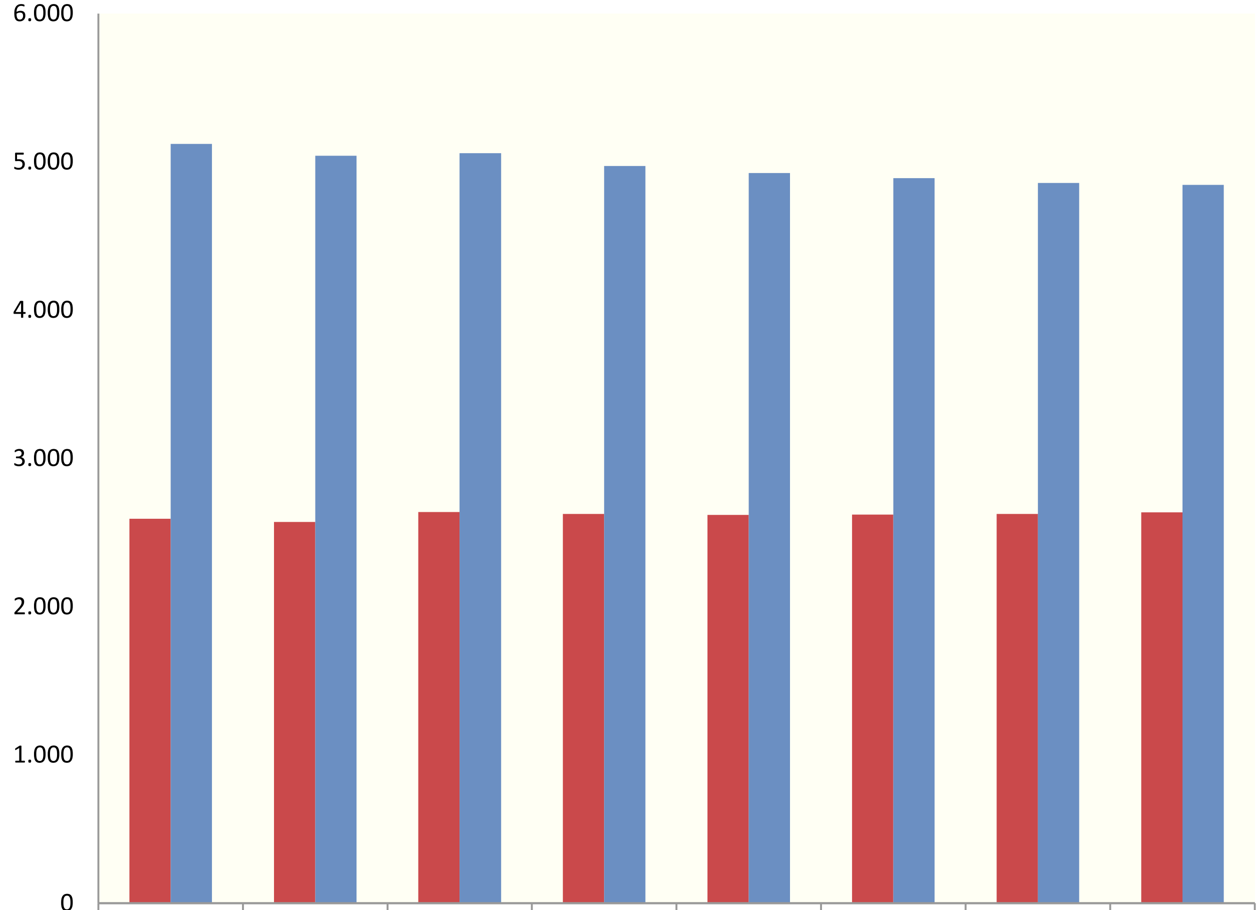
Television: Market shares based on subscriptions (national level, 2014Q1)



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
CAIW	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
CANAL DIGITAAL	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]
COGAS	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
DELTA	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
KPN	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[25-30%]	[25-30%]	[25-30%]	[25-30%]
Overig/Other	[0-5%]	[0-5%]	-	-	-	-	-	-
TELE2	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
T-MOBILE	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	-
UPC	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]
VODAFONE	-	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
ZIGGO	[35-40%]	[35-40%]	[35-40%]	[35-40%]	[35-40%]	[35-40%]	[35-40%]	[35-40%]

Based on questions 5_A_1_*_* of the Telecommonitor.

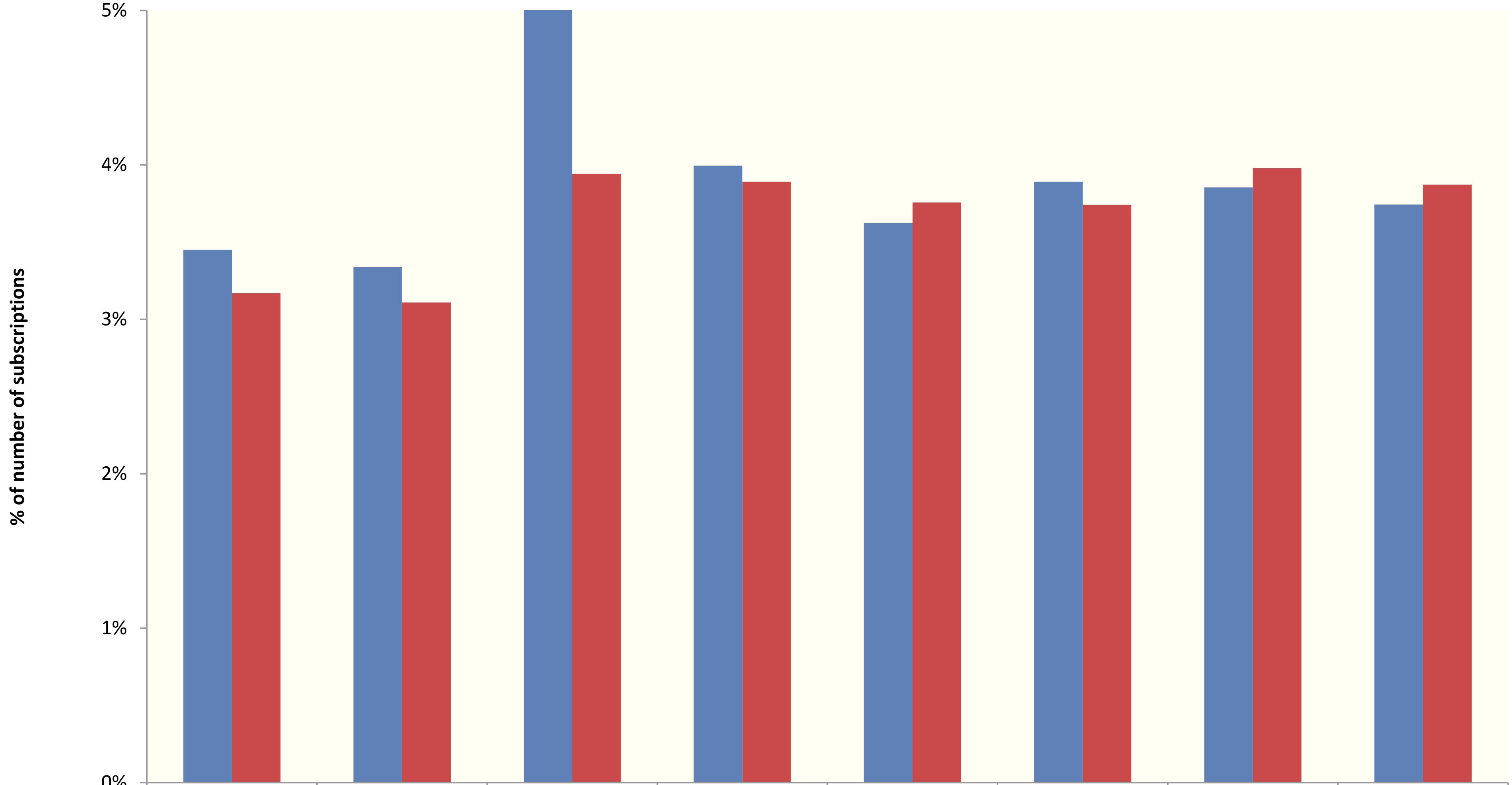
Television: Herfindahl-Hirschman Index based on RTV subscriptions (national)



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
HHI concentration index for subscriptions	2.593	2.571	2.637	2.624	2.619	2.621	2.624	2.636
HHI concentration index for subscriptions, when regional cable providers are seen as one provider	5.120	5.041	5.058	4.973	4.924	4.890	4.858	4.844

Based on questions 5_A_1_*_* of the Telecommonitor.

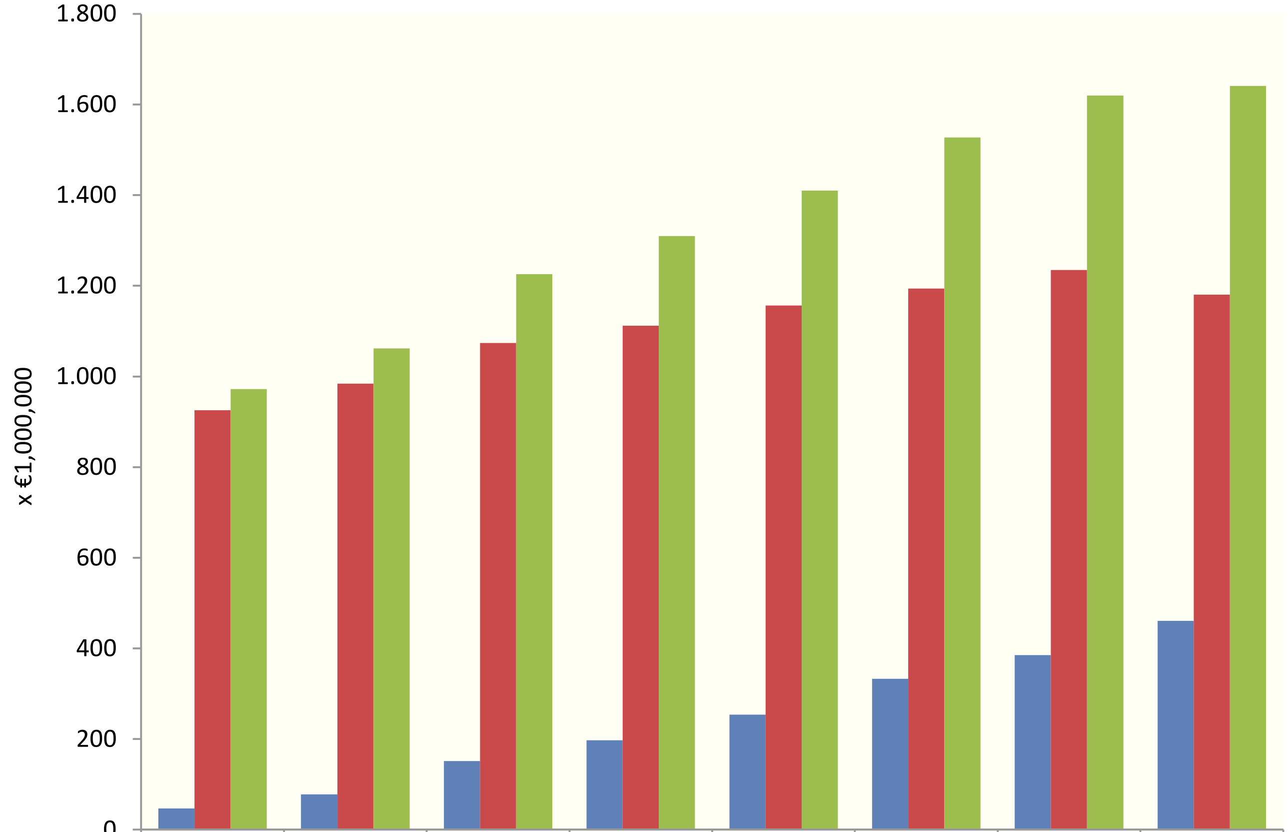
Television: Churn based on radio & TV subscriptions (standard package, national level)



	30-6-2012	30-9-2012	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014
Adds	3,5%	3,3%	5,6%	4,0%	3,6%	3,9%	3,9%	3,7%
Disconnects	3,2%	3,1%	3,9%	3,9%	3,8%	3,7%	4,0%	3,9%

Based on questions 5_A_1_*_*, 5_A_5_1 till 5_A_5_16 without 5_A_5_3, -4, -11, -12 of the Telecommonitor.

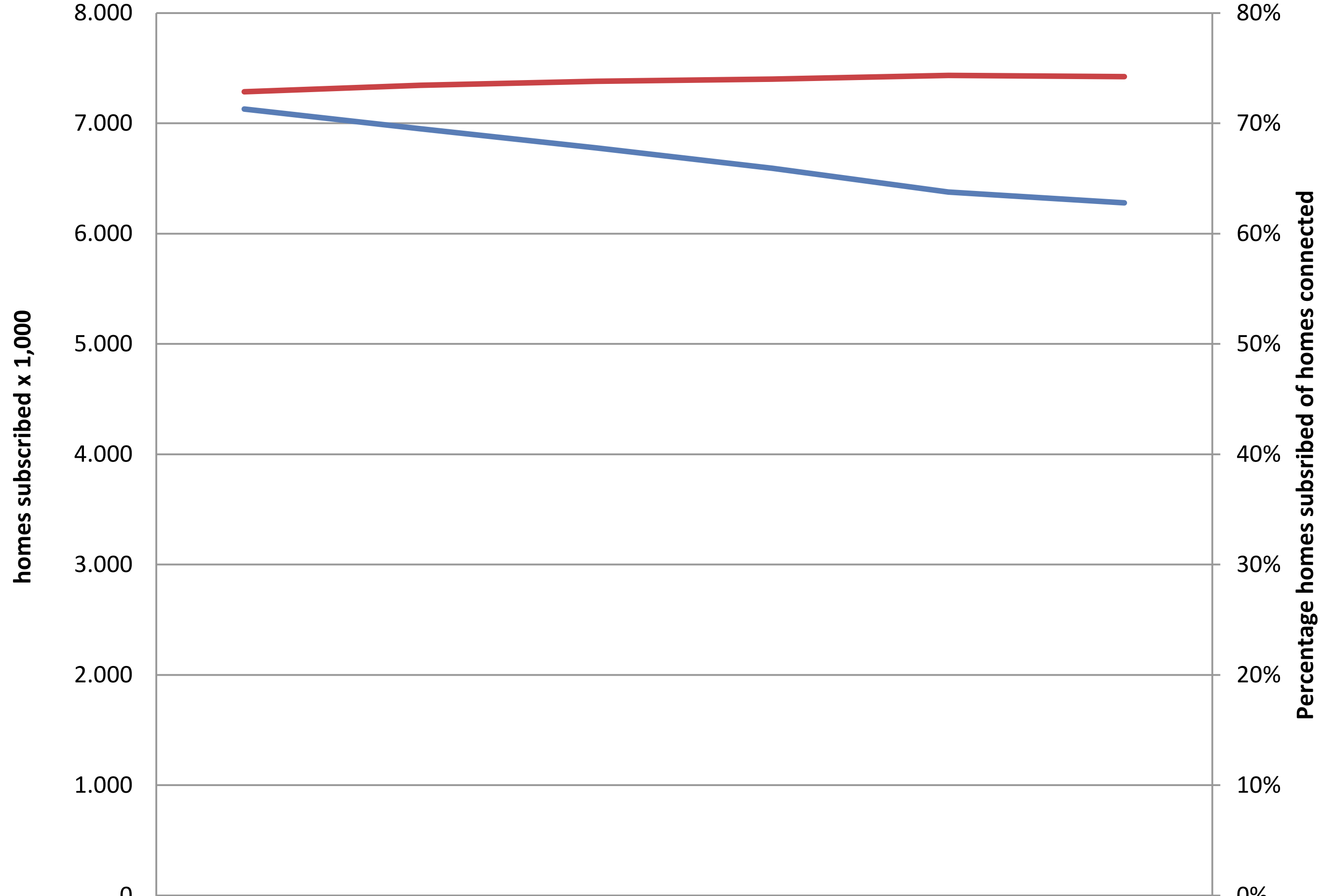
Television: Annual retail revenues RTV subscriptions



	31-12-2006	31-12-2007	31-12-2008	31-12-2009	31-12-2010	31-12-2011	31-12-2012	31-12-2013
Annual retail RTV revenues of non-cable operators aggregated	47	78	152	198	254	333	385	461
Annual retail RTV revenues of cable operators aggregated	925	984	1.074	1.112	1.156	1.194	1.235	1.180
Total retail revenues RTV per year	972	1.062	1.226	1.309	1.410	1.527	1.619	1.641

Based on question 5_B_4_1 of the Telecommonitor.

Television: use of cable networks (national)



	30-6-2011	31-12-2011	30-6-2012	31-12-2012	30-6-2013	31-12-2013
Number of physical cable connections (homes connected)	7.287	7.346	7.382	7.400	7.434	7.423
Cable penetration (active subscriptions / homes connected)	71%	69%	68%	66%	64%	63%

Based on questions 5_A_1_1_* and 5_A_3_1 of the Telecommonitor.

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Questioned market players

Figures per market are submitted by the market players enlisted below.

General		**Mobile services**	
AT&T	MTTM (per Q4 2013)	KPN	
BT	Pretium	T-Mobile	
CAIW	Reggefiber	Vodafone	
CanalDigitaal	Scarlet		
CIF (per Q4 2013)	Tele2		
Cogas	T-Mobile		
Colt	UPC		
Delta	UPC Business		
Easynet	Verizon		
EspritXB (till Q3 2013)	Vodafone		
Eurofiber	Ziggo		
KPN			

Fixed telephony		**Broadband and business network services**	
AT&T	Reggefiber	AT&T	Reggefiber
BT	Scarlet	BT	Tele2
CAIW	Tele2	CAIW	T-Mobile (till Q1 2014)
CanalDigitaal (per Q1 2014)	T-Mobile (till Q1 2014)	CanalDigitaal (per Q1 2014)	UPC
Colt	UPC	Colt	UPC Business
Delta	UPC Business	Delta	Verizon
EspritXB (till Q3 2013)	Verizon	Easynet	Vodafone
KPN	Vodafone	Eurofiber	Ziggo
MTTM (per Q4 2013)	Ziggo	KPN	
Pretium			

Television		**Multiplay**	
CAIW	T-Mobile (till Q1 2014)	CAIW	Tele2
CanalDigitaal	UPC	CanalDigitaal (per Q1 2014)	T-Mobile (till Q1 2014)
Cogas	UPC Business	Cogas	UPC
Delta	Vodafone	Delta	UPC Business
KPN	Ziggo	KPN	Vodafone
Tele2		Scarlet	Ziggo