

Annual Report 2005

Market monitor



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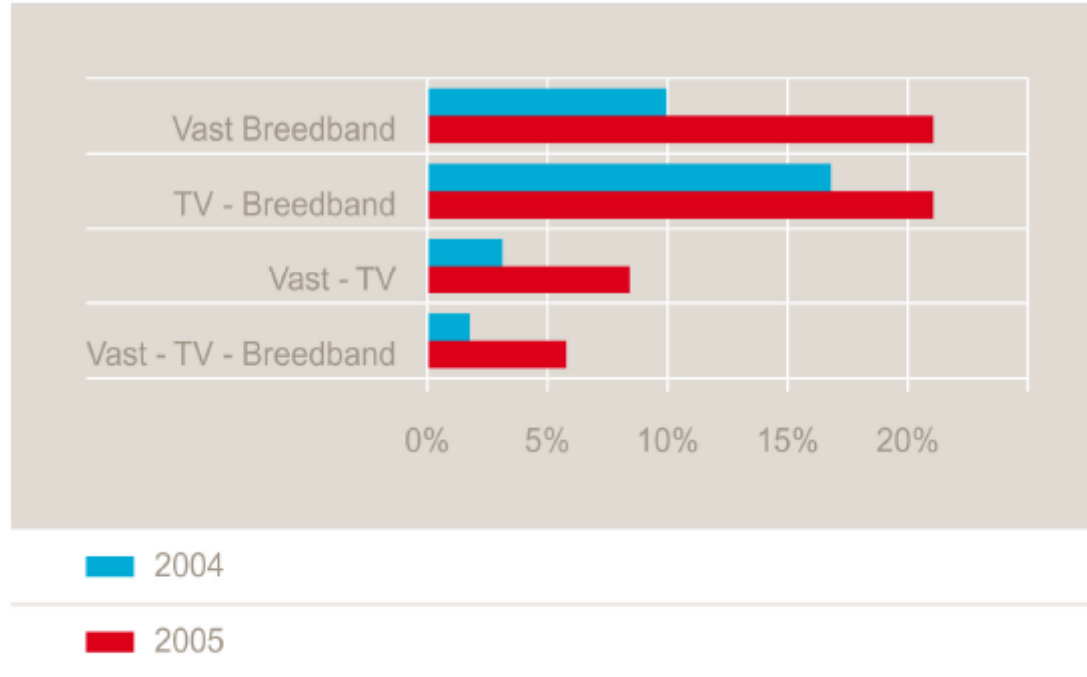
Market size 2004

32 largest firms (turnover > 20 mln)

euro 14,6 billion

1. Bundles

Households with products from single provider



Source: EIM Consumentenonderzoek 2006

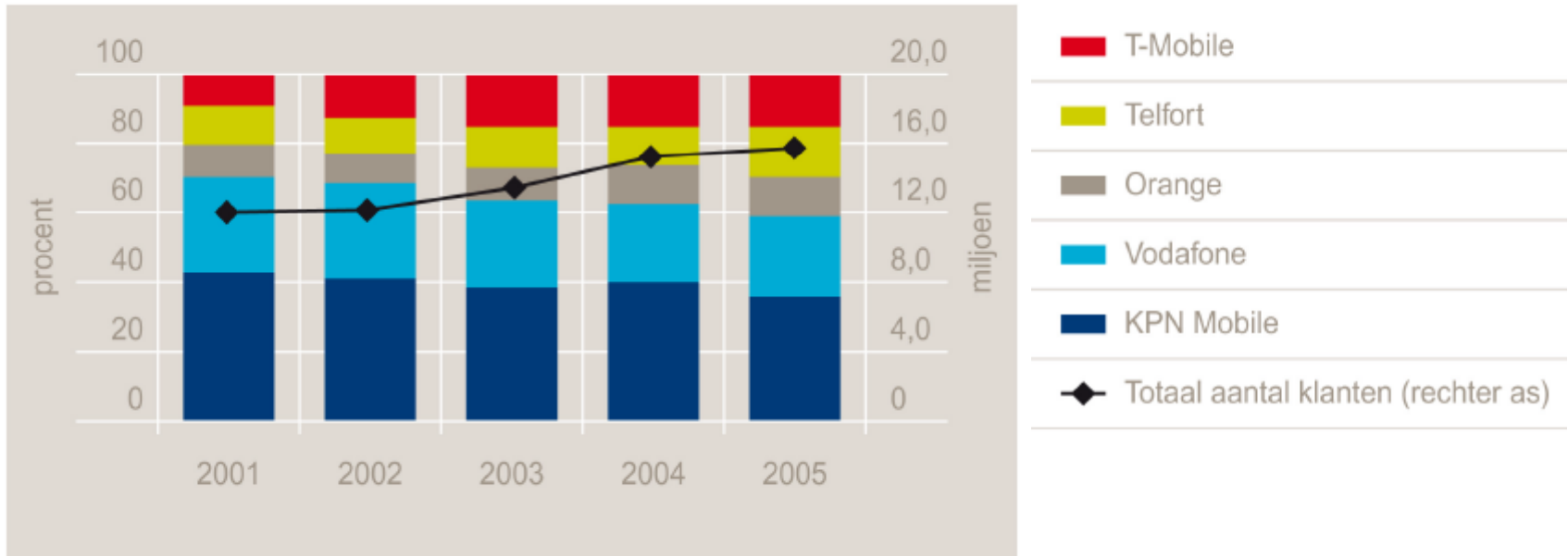
2. Telephony

Calling methods Dutch households



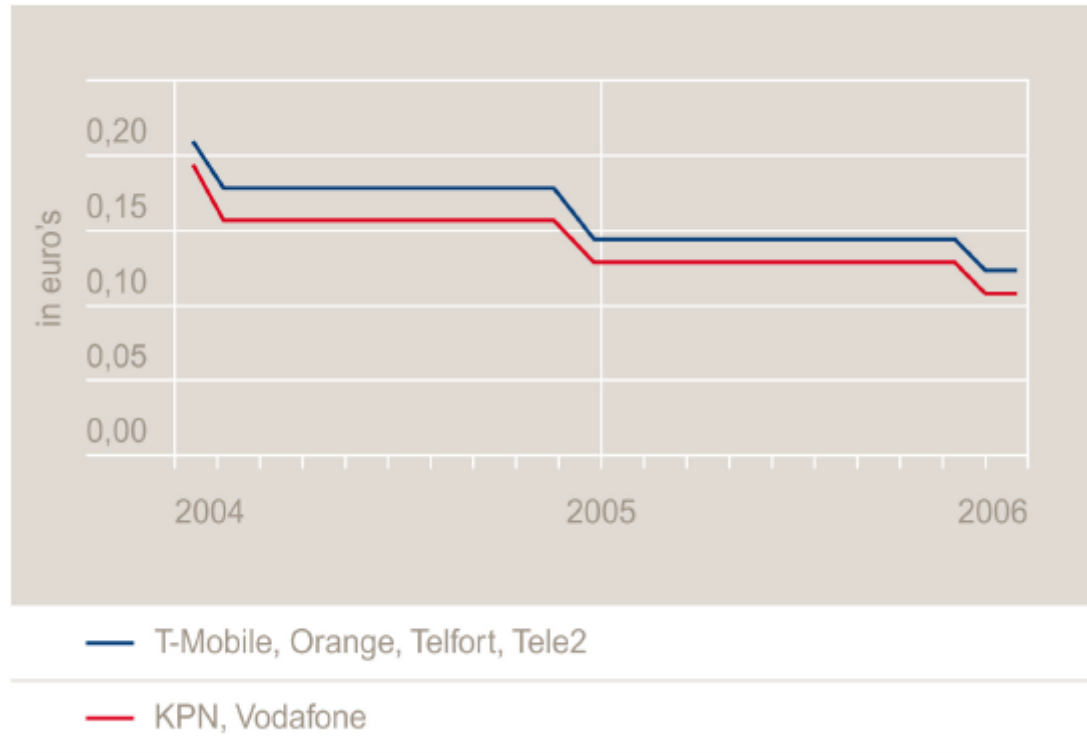
Source: KPN kwartaalrapportage, Vecai, Trouw

Market shares mobile providers (by number of connections)



Source: Oxera

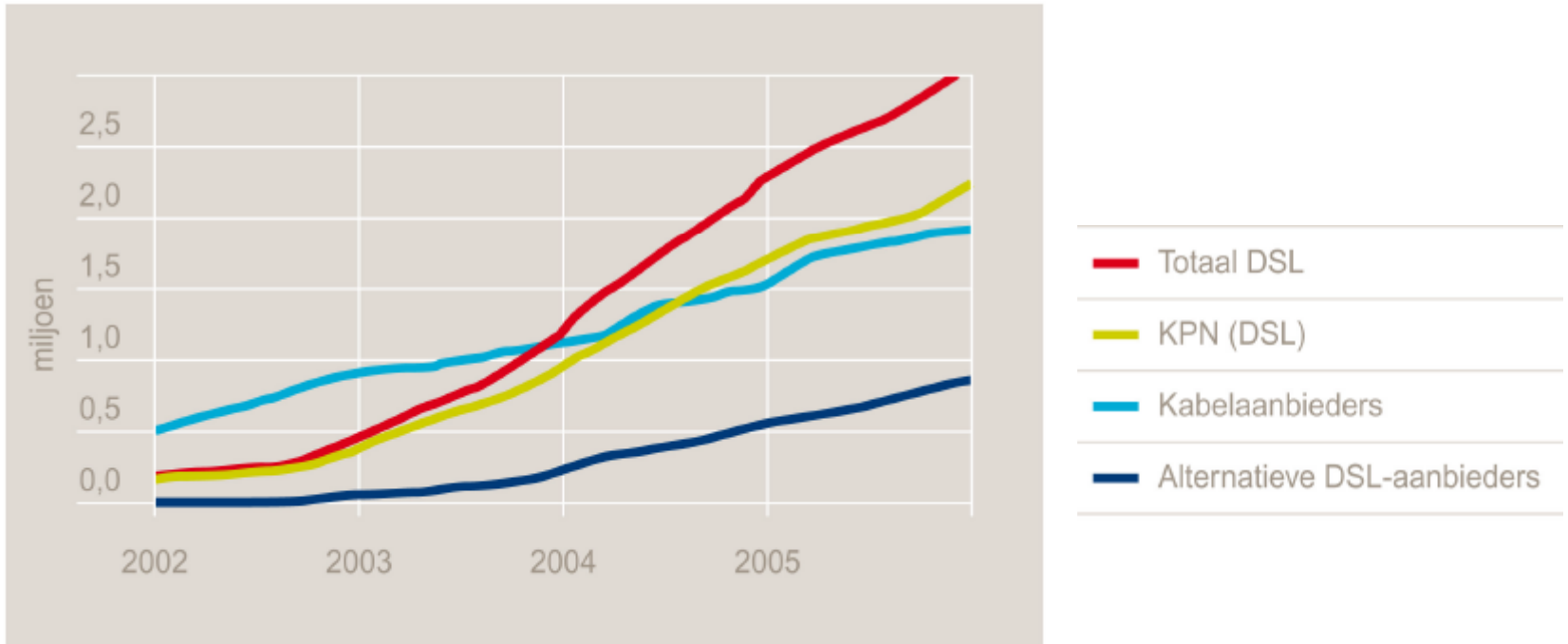
Mobile termination tariffs



Source: OPTA

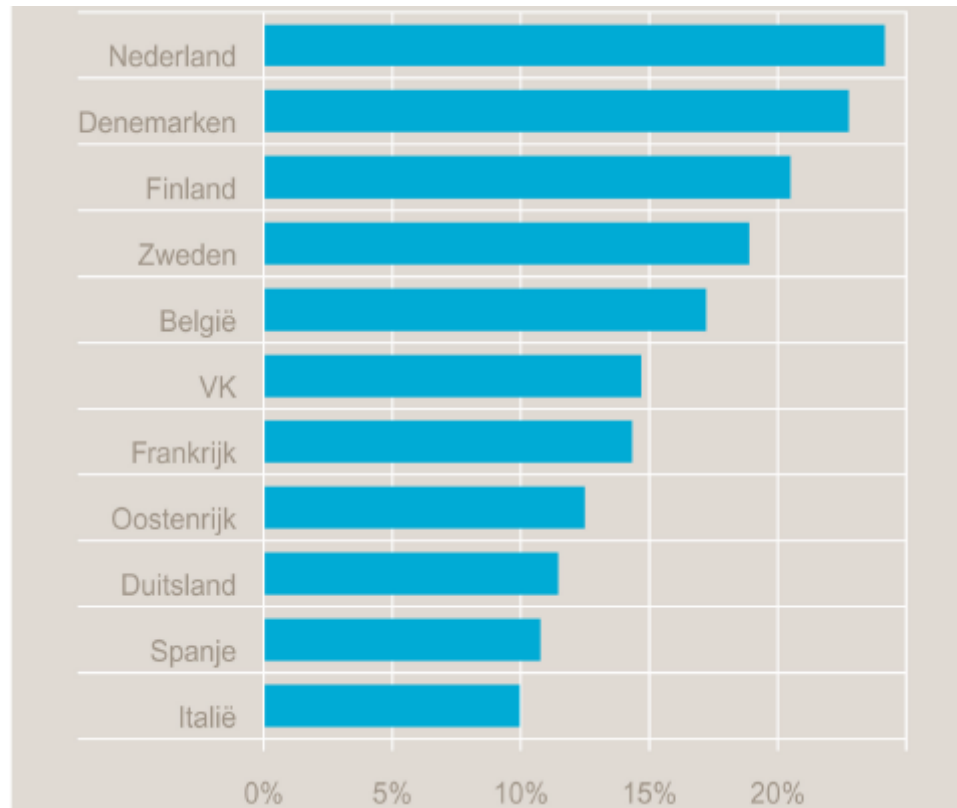
3. Broadband internet

Number of xDSL and cable connections



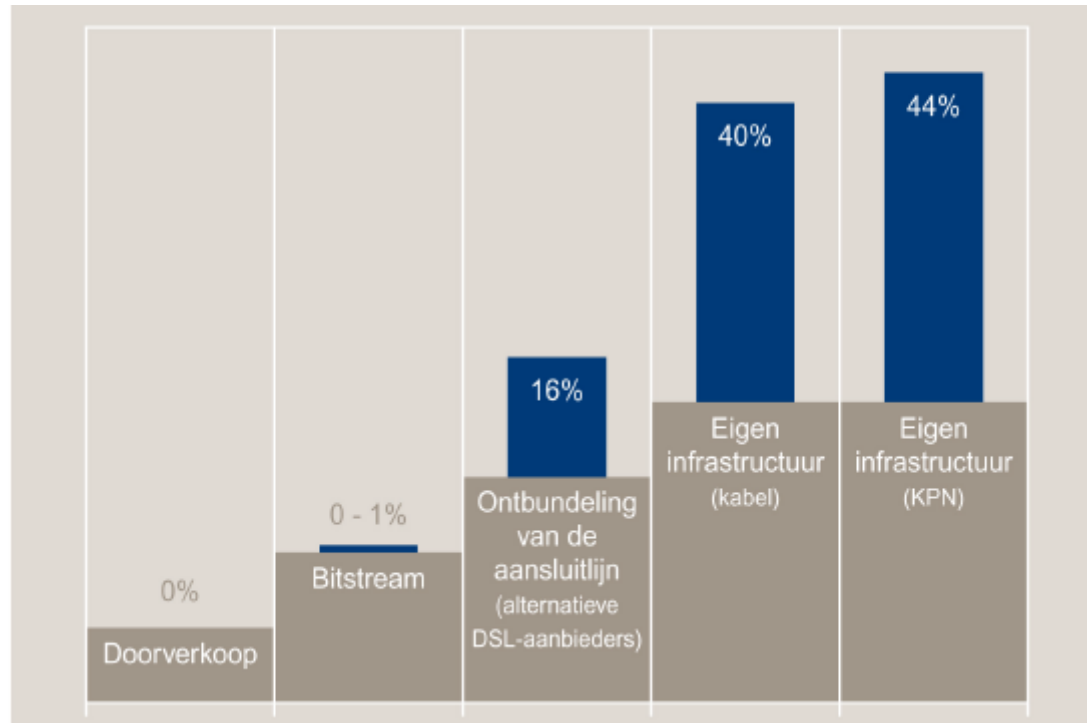
Source: KPN, Platform Nederland Breedband en Telecompaper

Penetration level broadband internet (per capita)



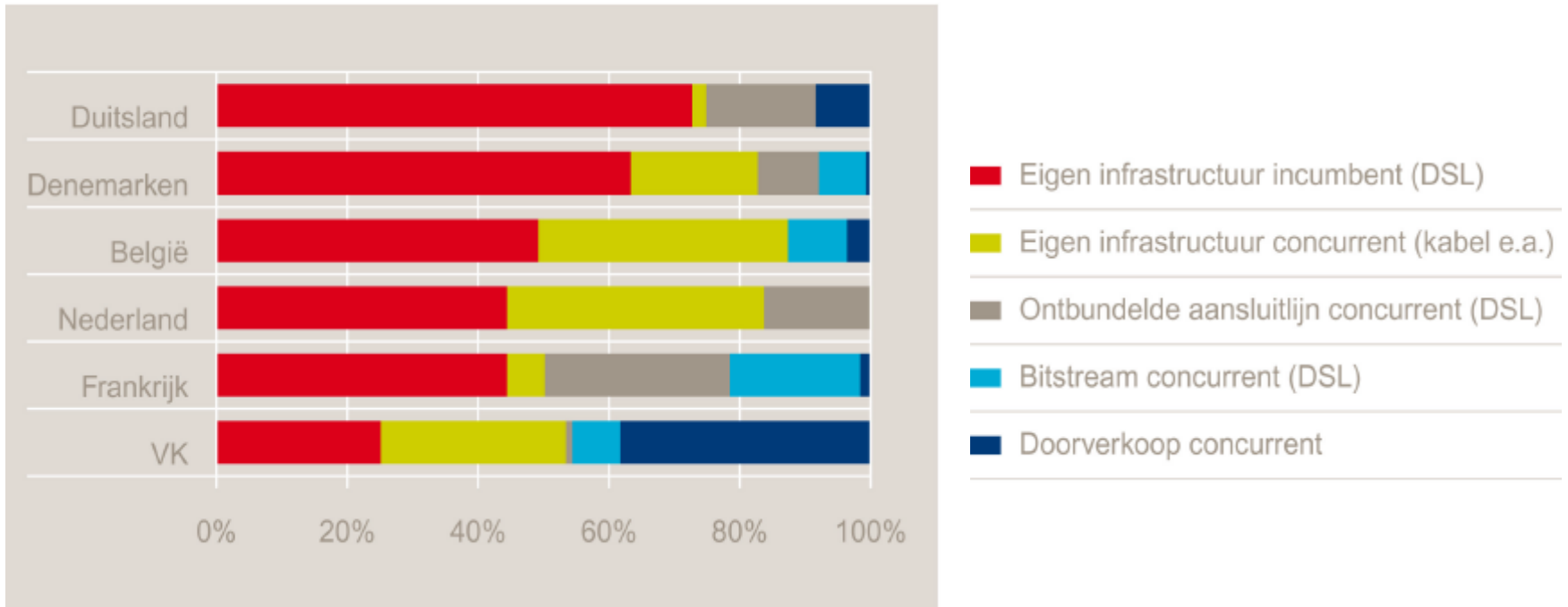
Source: European Commission, 11th Implementation report

Investment ladder for providing broadband-internet access



Source: OPTA

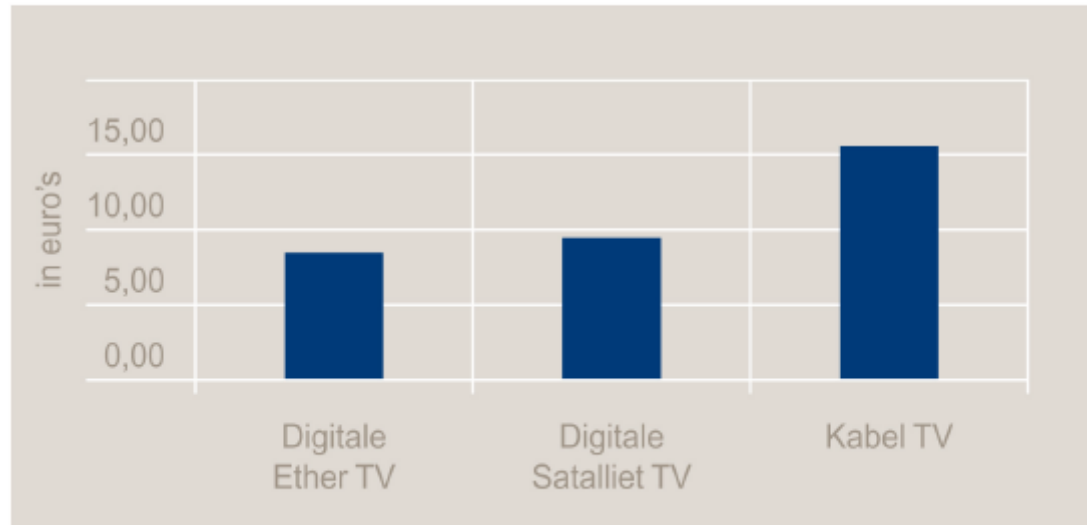
Investment ladder in European perspective



Source: European Commission, 11th Implementation report

4. Broadcasting

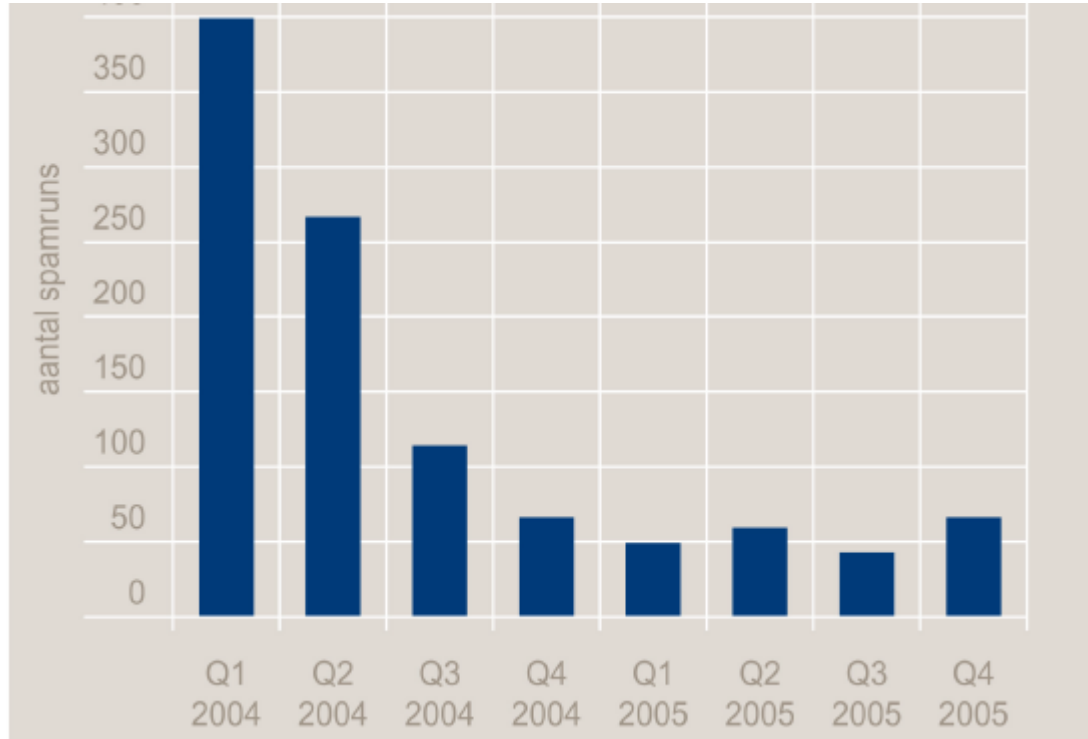
Price standard service RTV via different infrastructures



Source: Dialogic, September 2005 en OPTA Marktanalysebesluit Omroep

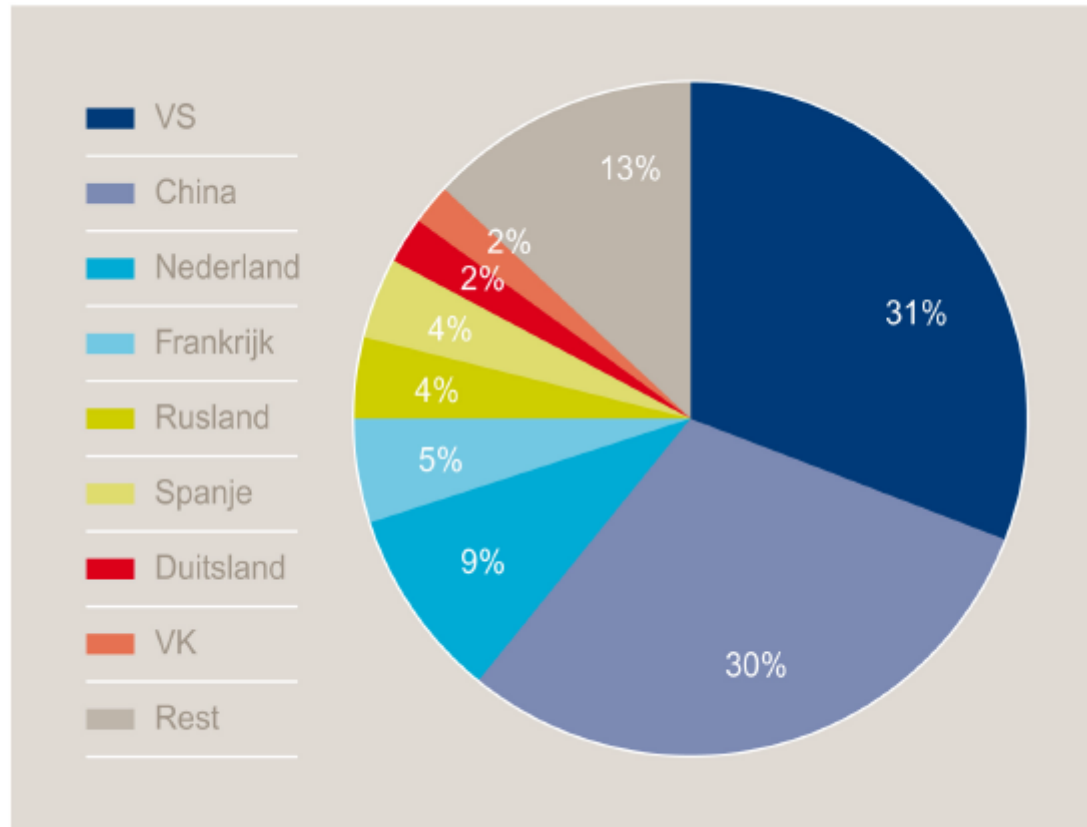
5. Spam

Quarterly spam runs in the Netherlands



Source: spamvrij.nl

Share of *spyware* from websites per country

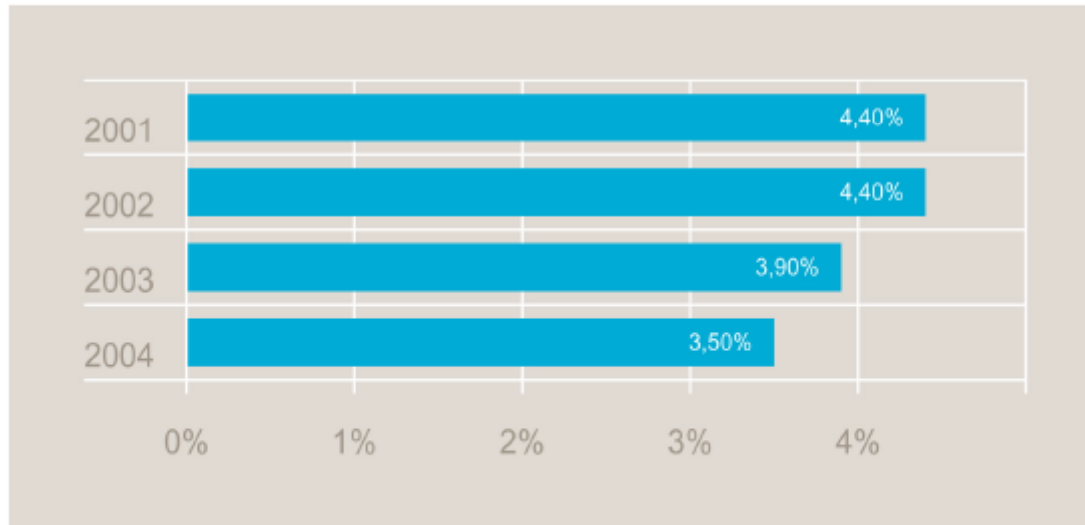


Source: Webroot, *State of Spyware 2005*

6. *Postal market*

- 2 entrants: Sandd and Selekt Mail
- Doubled their 2005 market share to approx. 8%

Percentage delayed letters in the Netherlands (standard overnight-service) by TPG Post



Source: Concession report TPG Post