

Autoriteit  
Consument & Markt



# Telecom Monitor

## Q1 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.

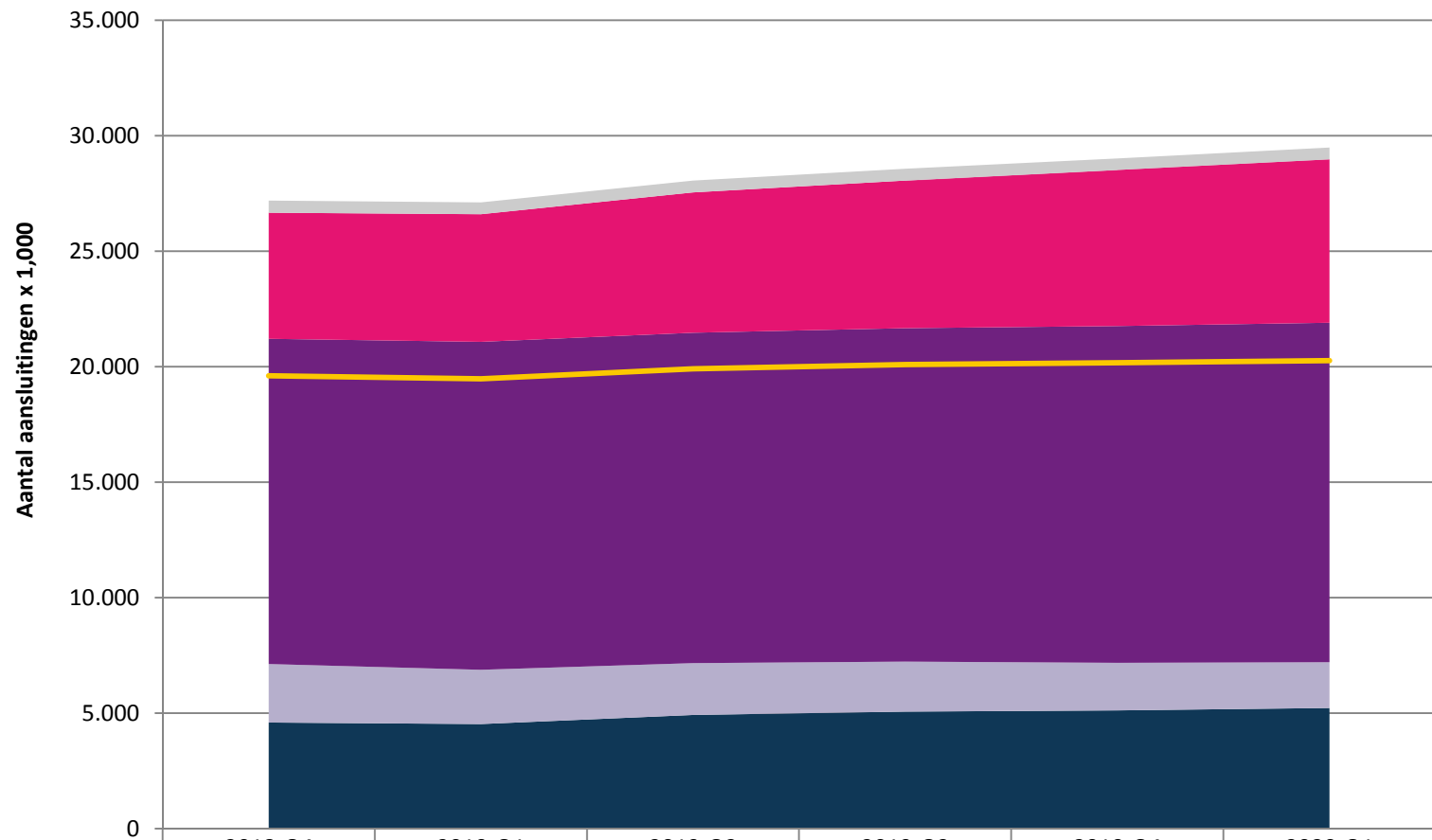
ACM verifies that data. In that way, ACM is able to keep track of the trends and developments in the various markets. The figures form a solid basis for ACM's three-year market analyses.

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# Mobile

## Retail connections

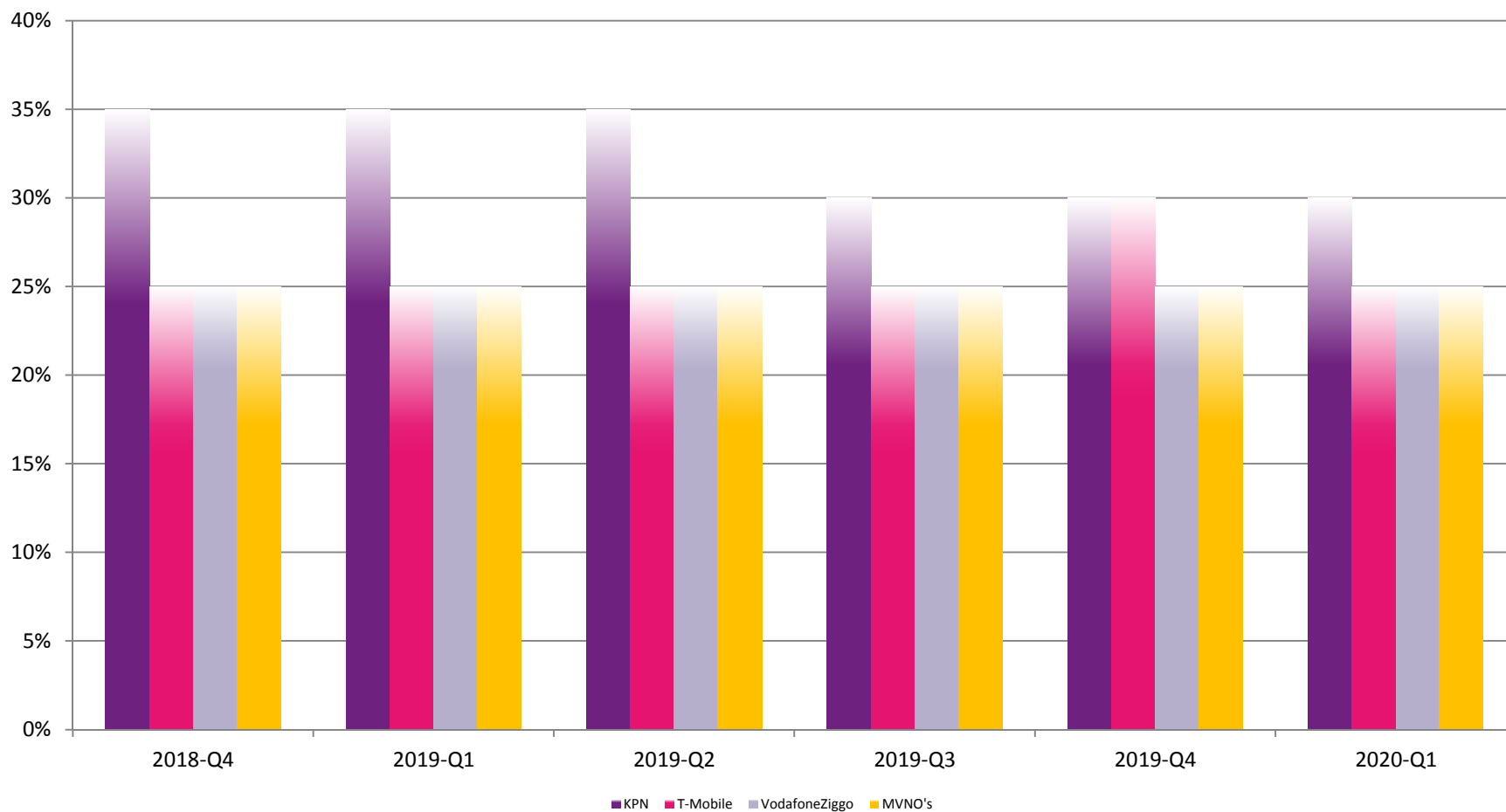


	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4	2020-Q1
Data only mobile	520	503	504	509	505	512
M2M	5.456	5.525	6.080	6.385	6.744	7.067
Postpaid MNO	14.078	14.193	14.291	14.433	14.587	14.700
Prepaid MNO	2.534	2.358	2.250	2.167	2.060	1.987
Postpaid and prepaid MVNO	4.595	4.526	4.922	5.068	5.115	5.218
Mobile bundle (data and speech)	19.606	19.468	19.900	20.093	20.170	20.257

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

## Retail market share based on connections

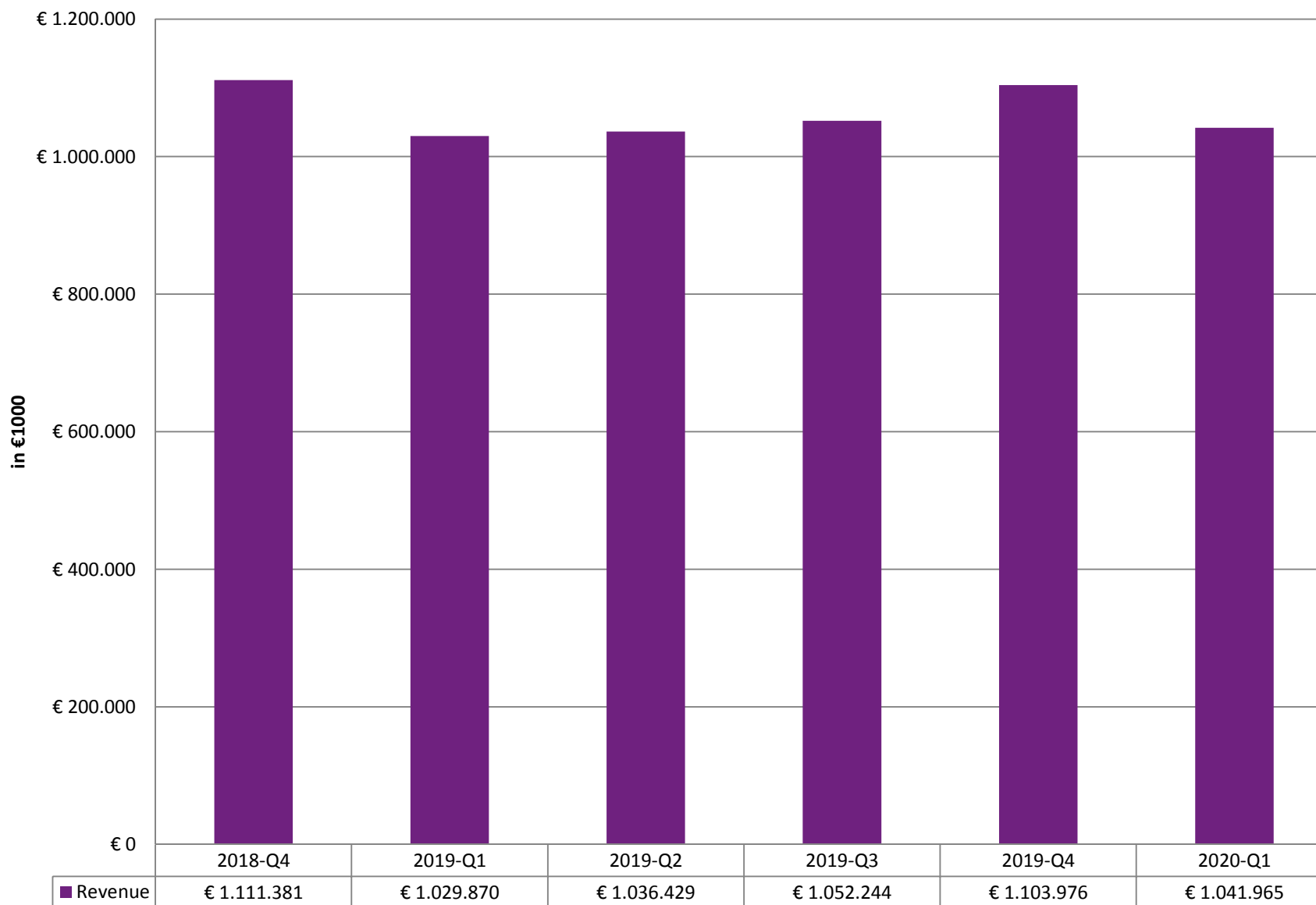


	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4	2020-Q1
KPN	[30 - 35%]	[30 - 35%]	[30 - 35%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
VodafoneZiggo	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]
T-Mobile	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[25 - 30%]	[20 - 25%]
MVNO's	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]

Op basis van vragen 10\_A1\_1\_1, 10\_A1\_2\_1, 10\_A1\_3\_1, en 10\_B3\_1\_1 van de Telecommonitor

# Mobile

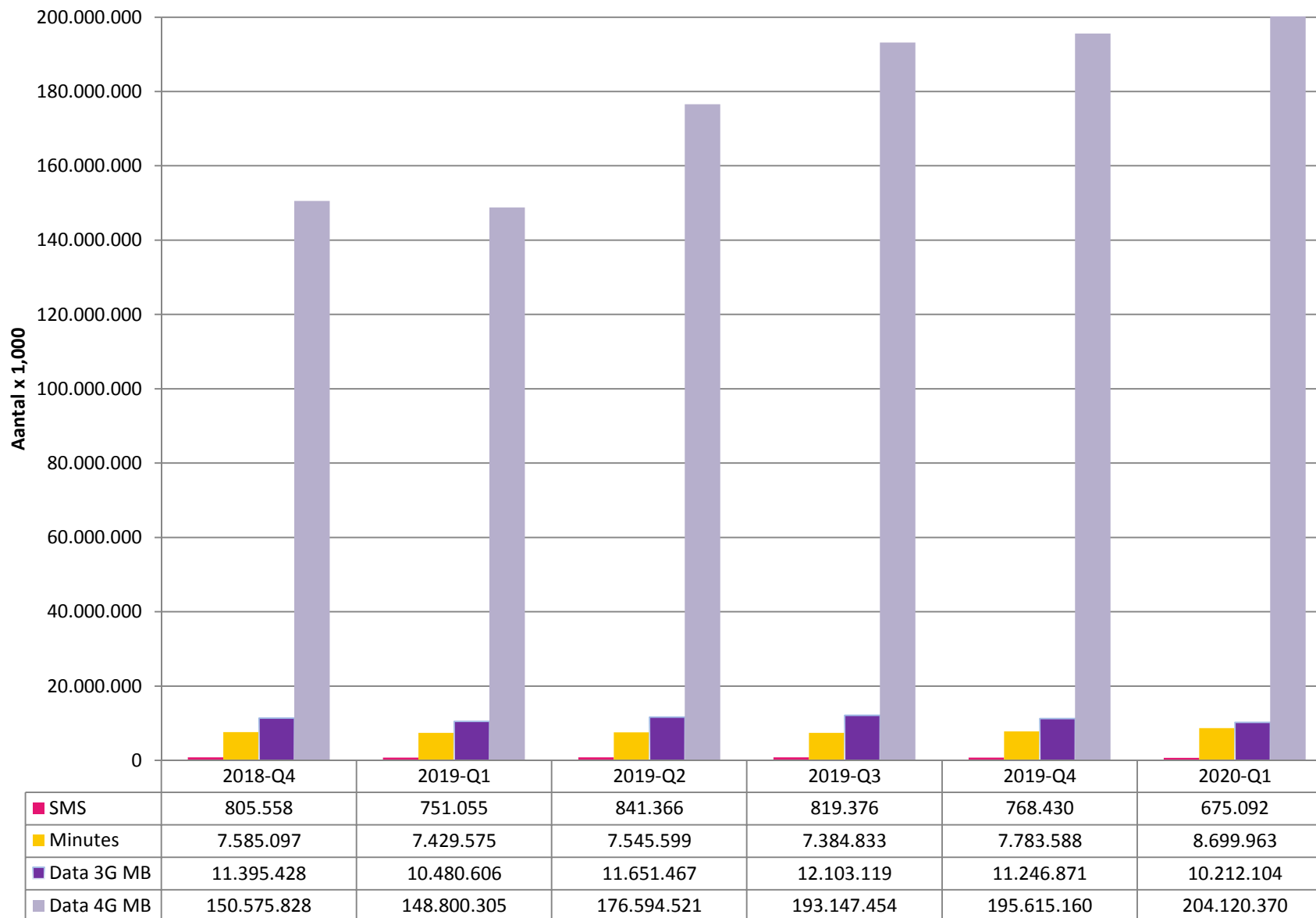
## Retail revenue of Mobile Network Operators (MNOs)



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

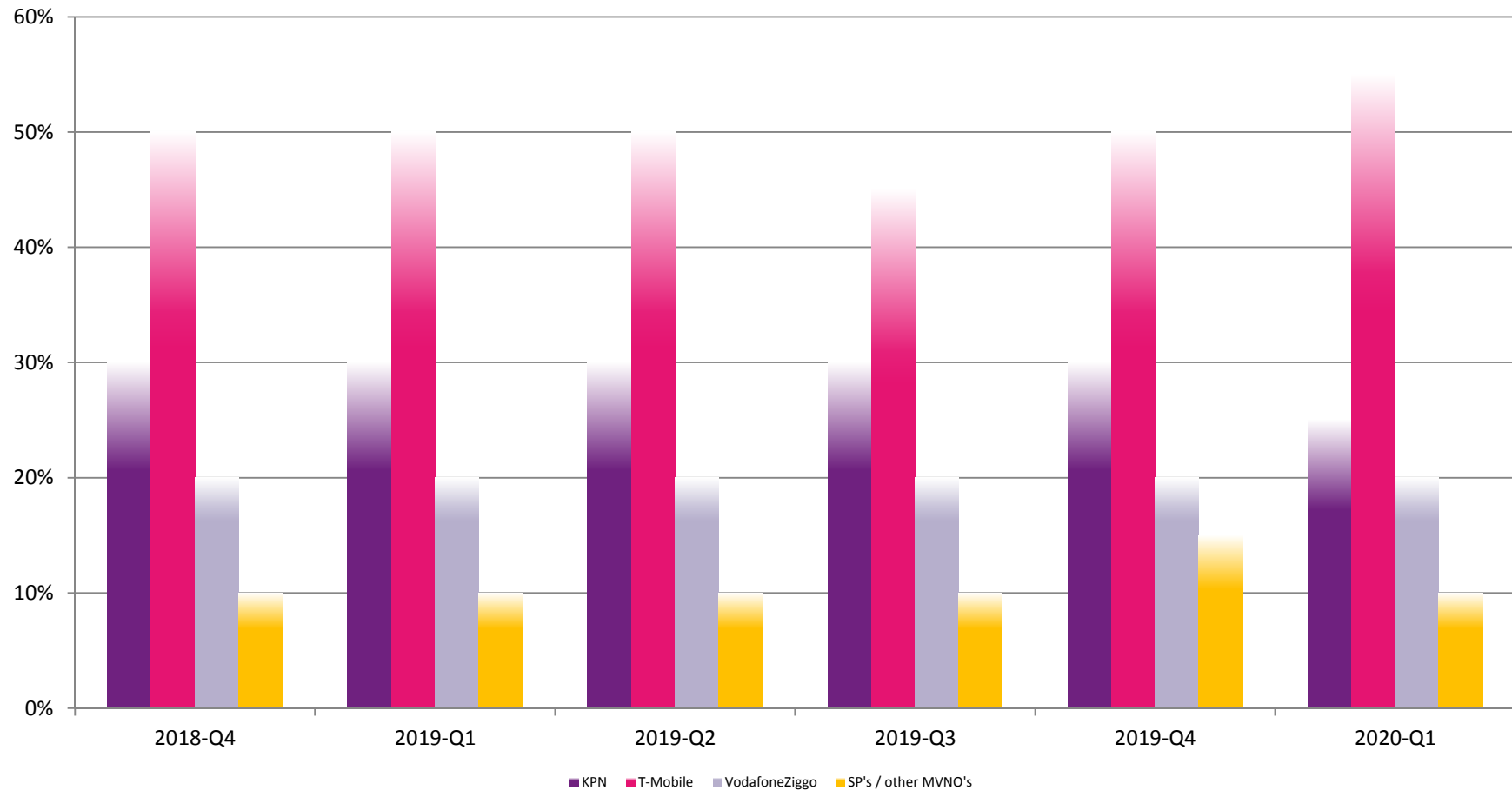
## Retail volume of voice minutes, data and SMS/text



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

# Mobile

## Retail market share based on data consumption

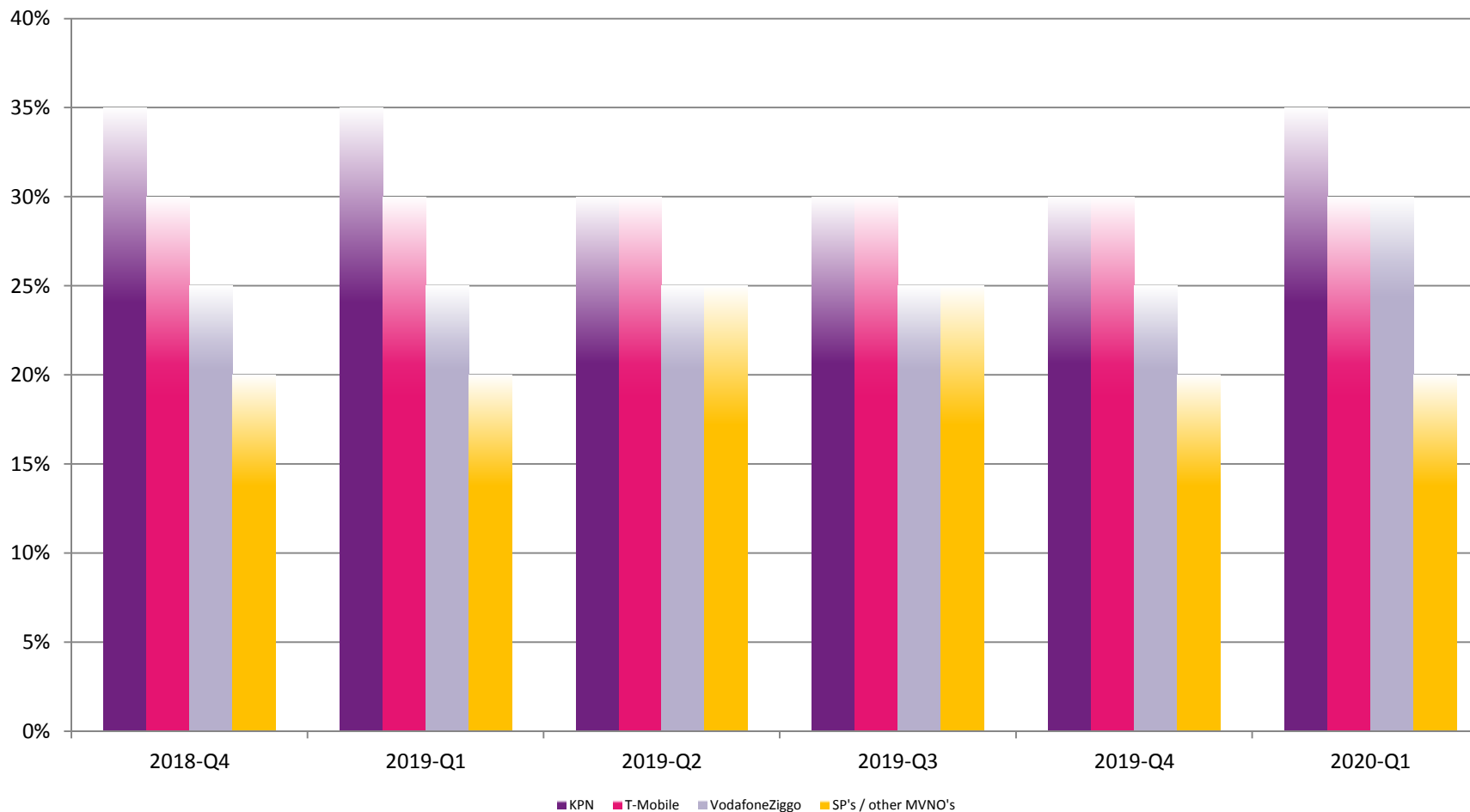


	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4	2020-Q1
KPN	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[20 - 25%]
VodafoneZiggo	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]
T-Mobile	[45 - 50%]	[45 - 50%]	[45 - 50%]	[40 - 45%]	[45 - 50%]	[50 - 55%]
SP's / other MVNO's	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[10 - 15%]	[5 - 10%]

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 market share based on consumed voice minutes



	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4	2020-Q1
KPN	[30 - 35%]	[30 - 35%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[30 - 35%]
VodafoneZiggo	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[25 - 30%]
T-Mobile	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
SP's / other MVNO's	[15 - 20%]	[15 - 20%]	[20 - 25%]	[20 - 25%]	[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

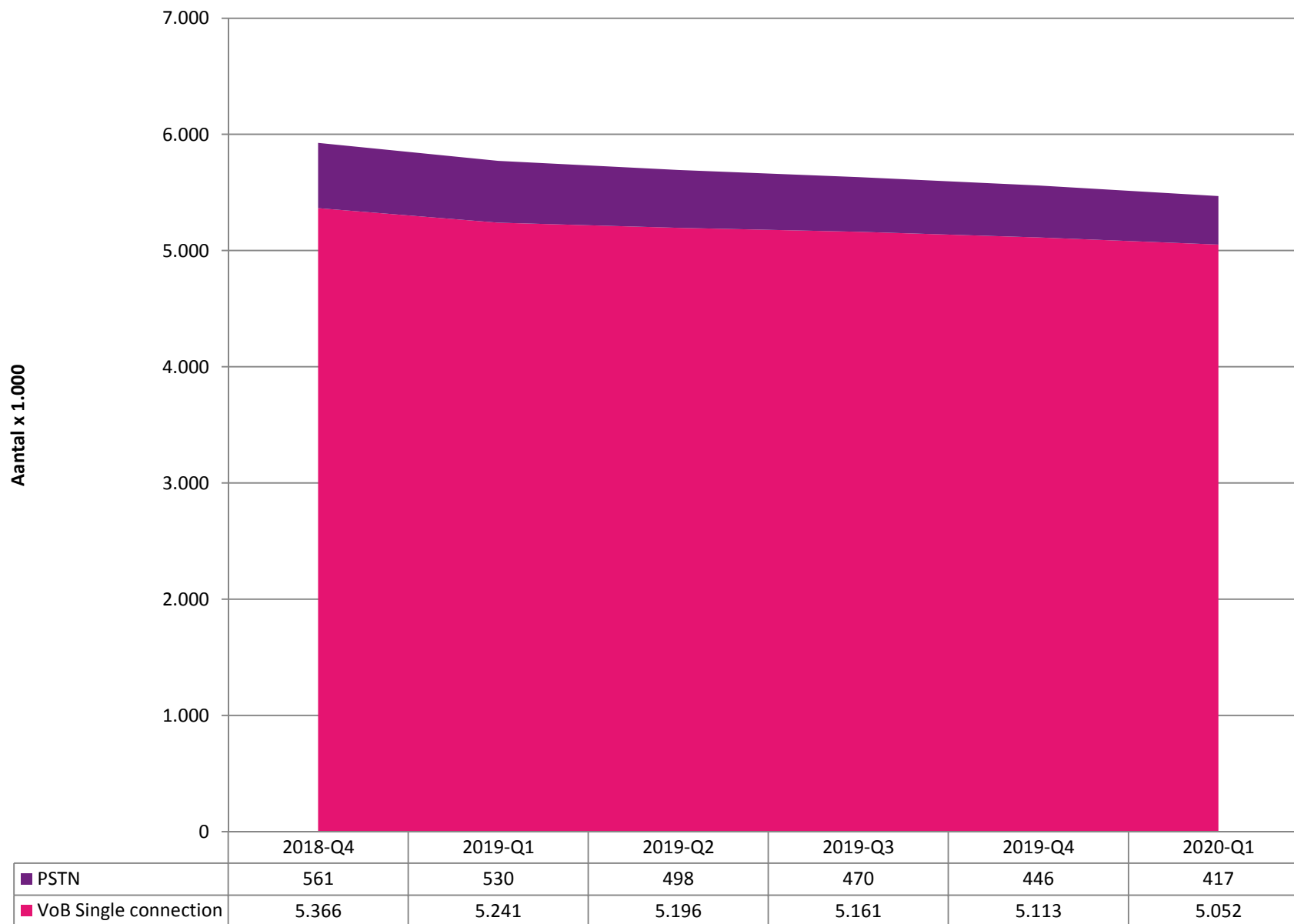
## Wholesale volume of call termination (excluding onnet)



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

# Fixed telephony

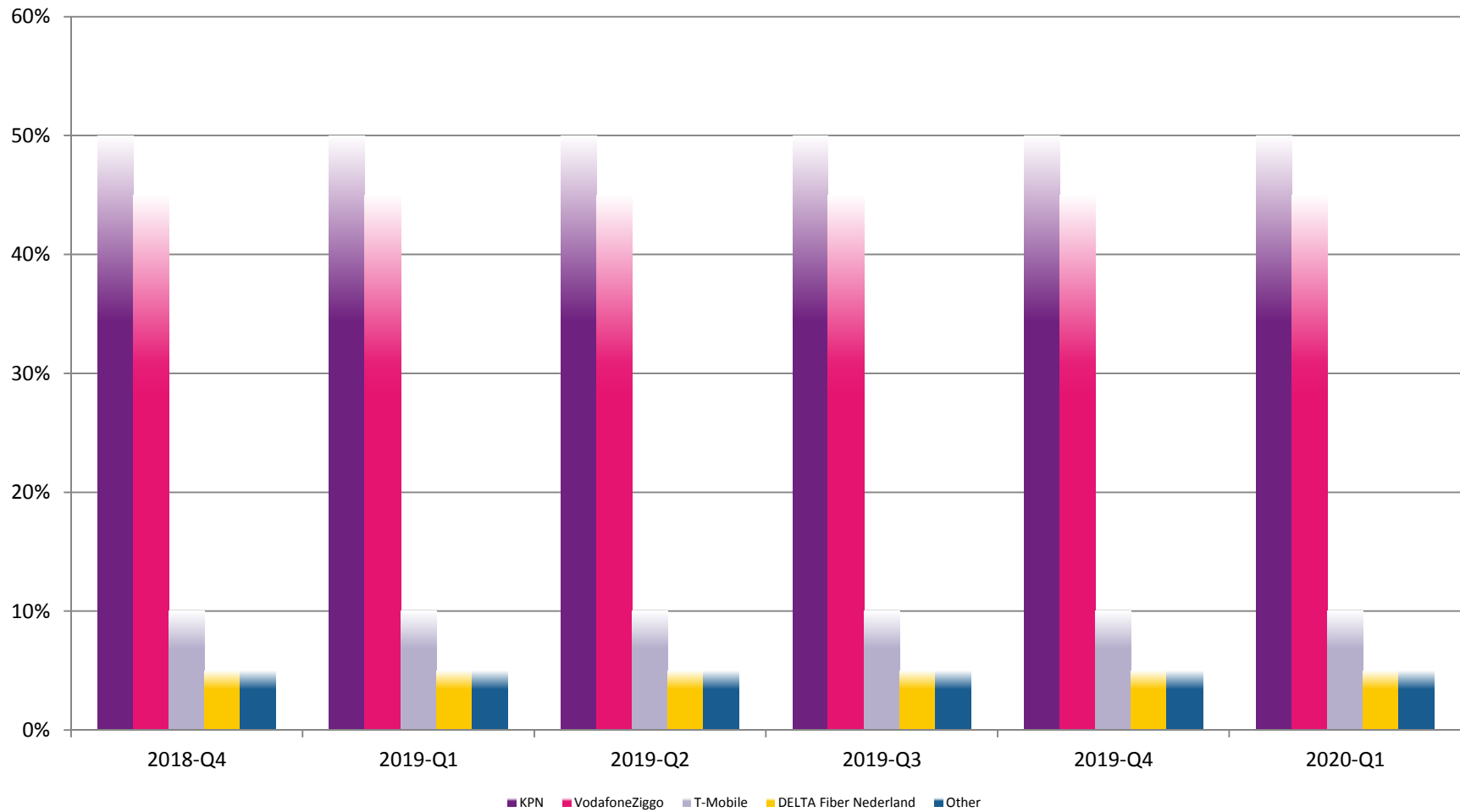
## Retail single connections



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



	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4	2020-Q1
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%]	[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\_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



# Fixed telephony

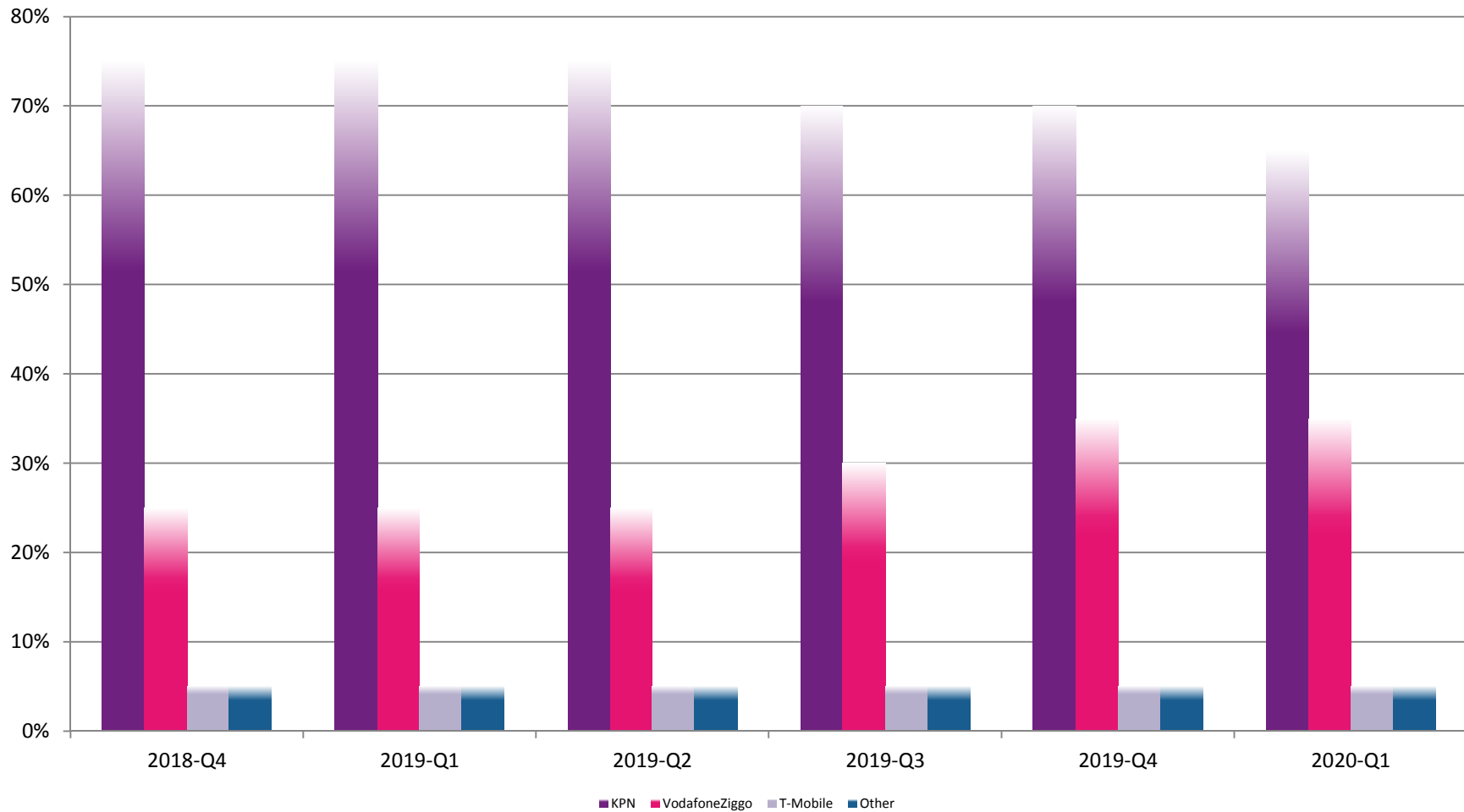
## Retail dual connections



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

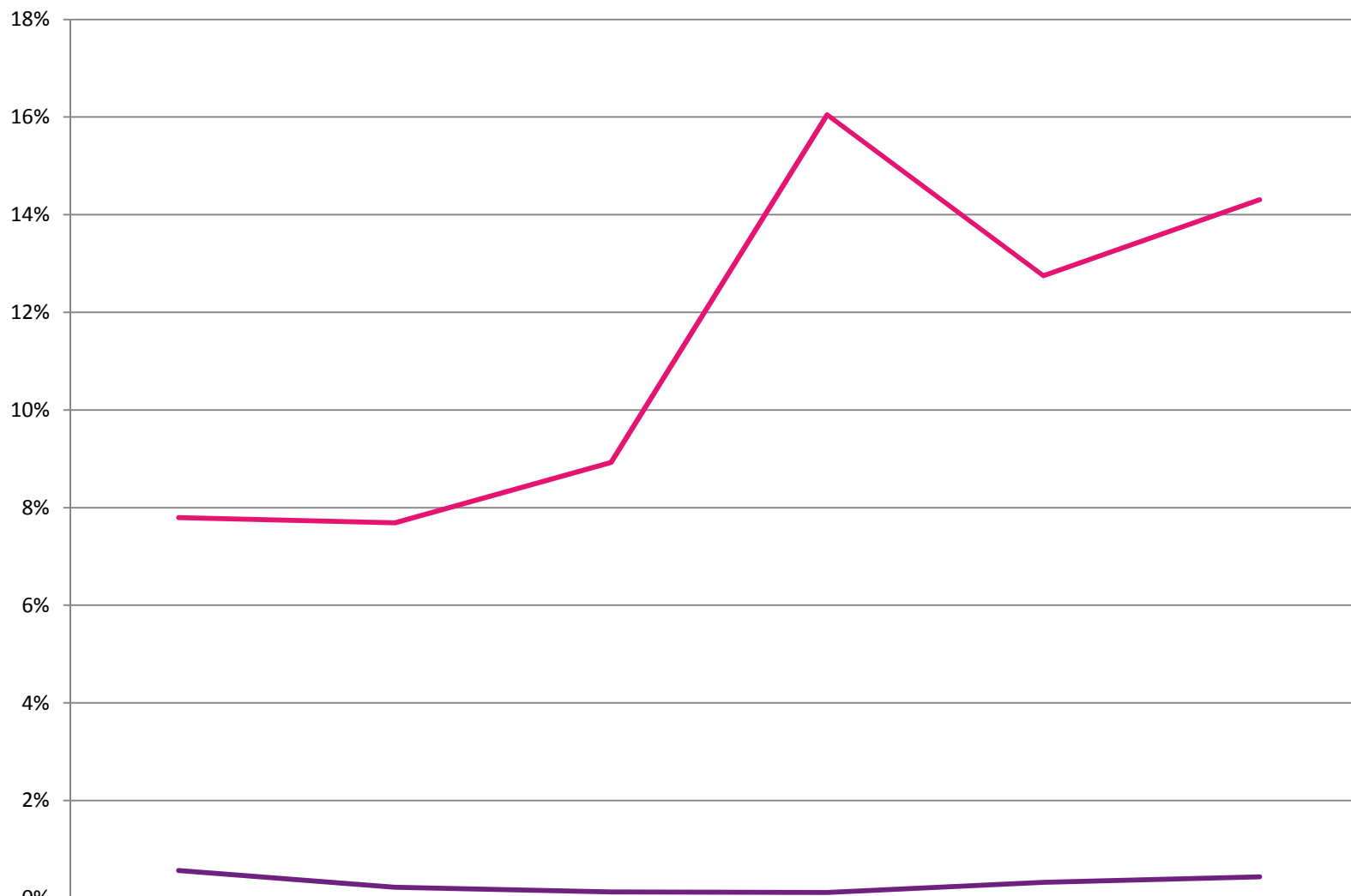


	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4	2020-Q1
KPN	[70 - 75%]	[70 - 75%]	[70 - 75%]	[65 - 70%]	[65 - 70%]	[60 - 65%]
VodafoneZiggo	[20 - 25%]	[20 - 25%]	[20 - 25%]	[25 - 30%]	[30 - 35%]	[30 - 35%]
T-Mobile	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
Other	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[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



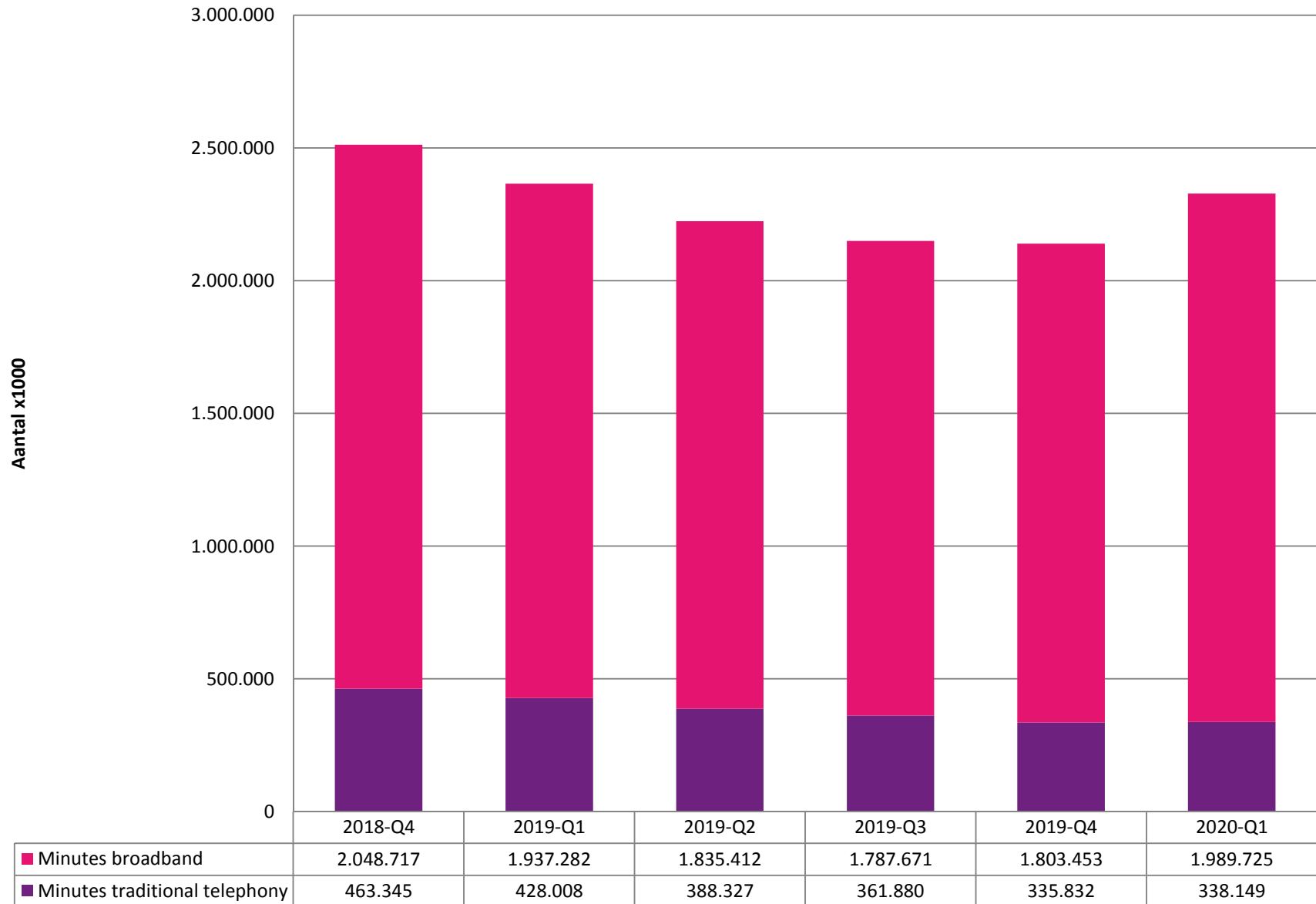
	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4	2020-Q1
— Adds	0,57%	0,22%	0,13%	0,12%	0,32%	0,44%
— Disconnects	7,80%	7,69%	8,92%	16,04%	12,75%	14,31%

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

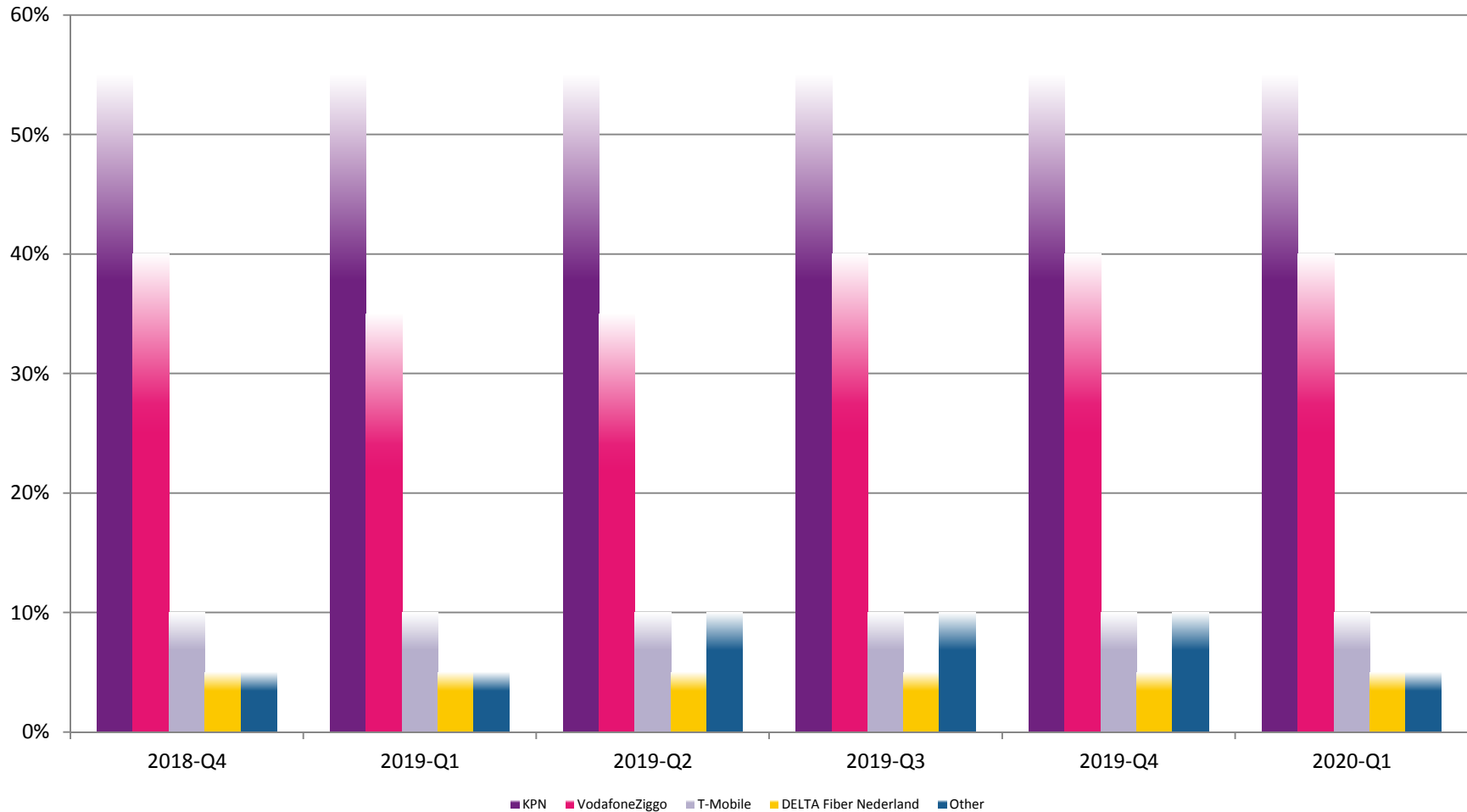
## Retail volume based on voice minutes



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

# Fixed telephony

## Retail market share based on voice minutes

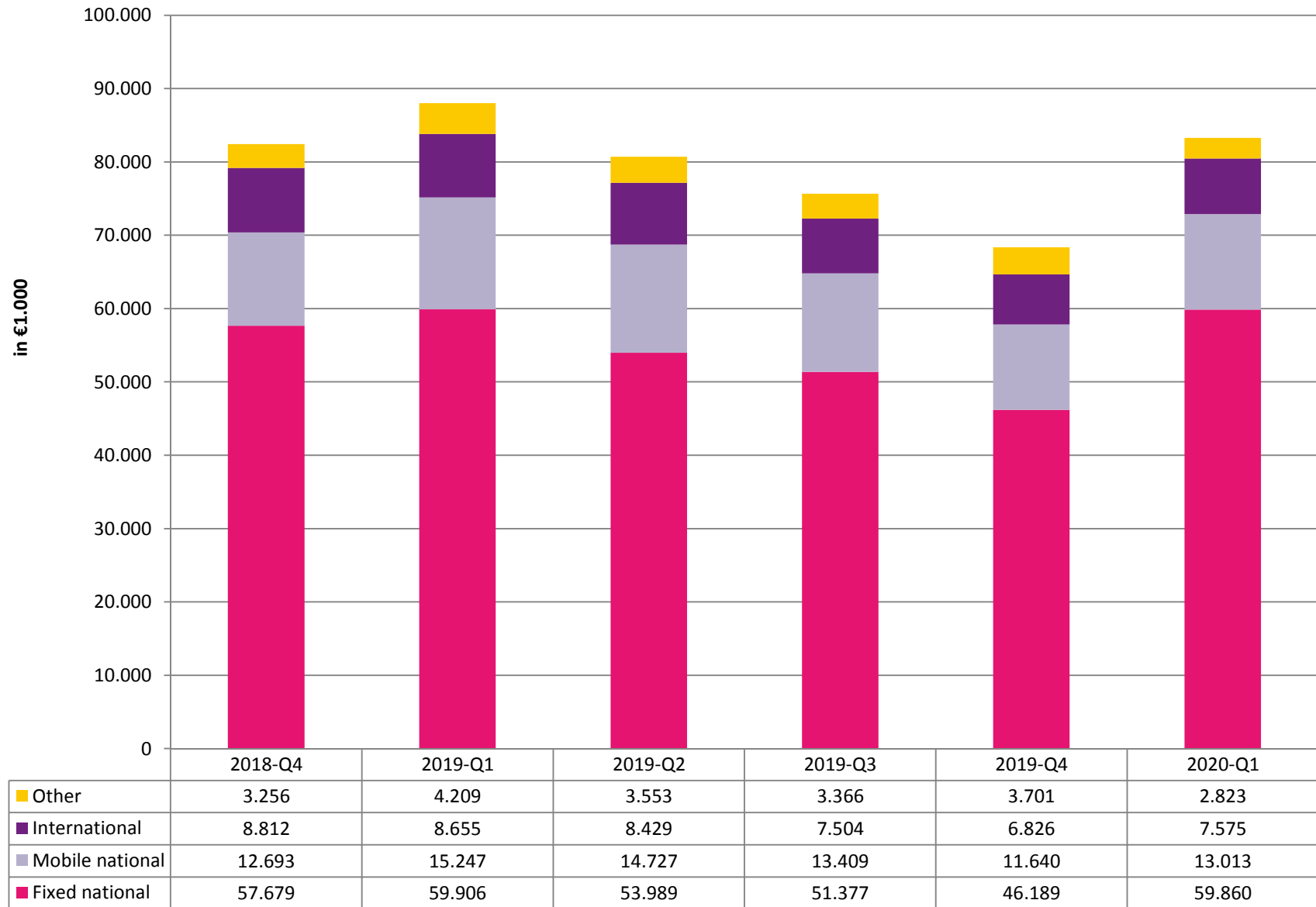


	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4	2020-Q1
KPN	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]
VodafoneZiggo	[35 - 40%]	[30 - 35%]	[30 - 35%]	[35 - 40%]	[35 - 40%]	[35 - 40%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
Other	[0 - 5%]	[0 - 5%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[0 - 5%]

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

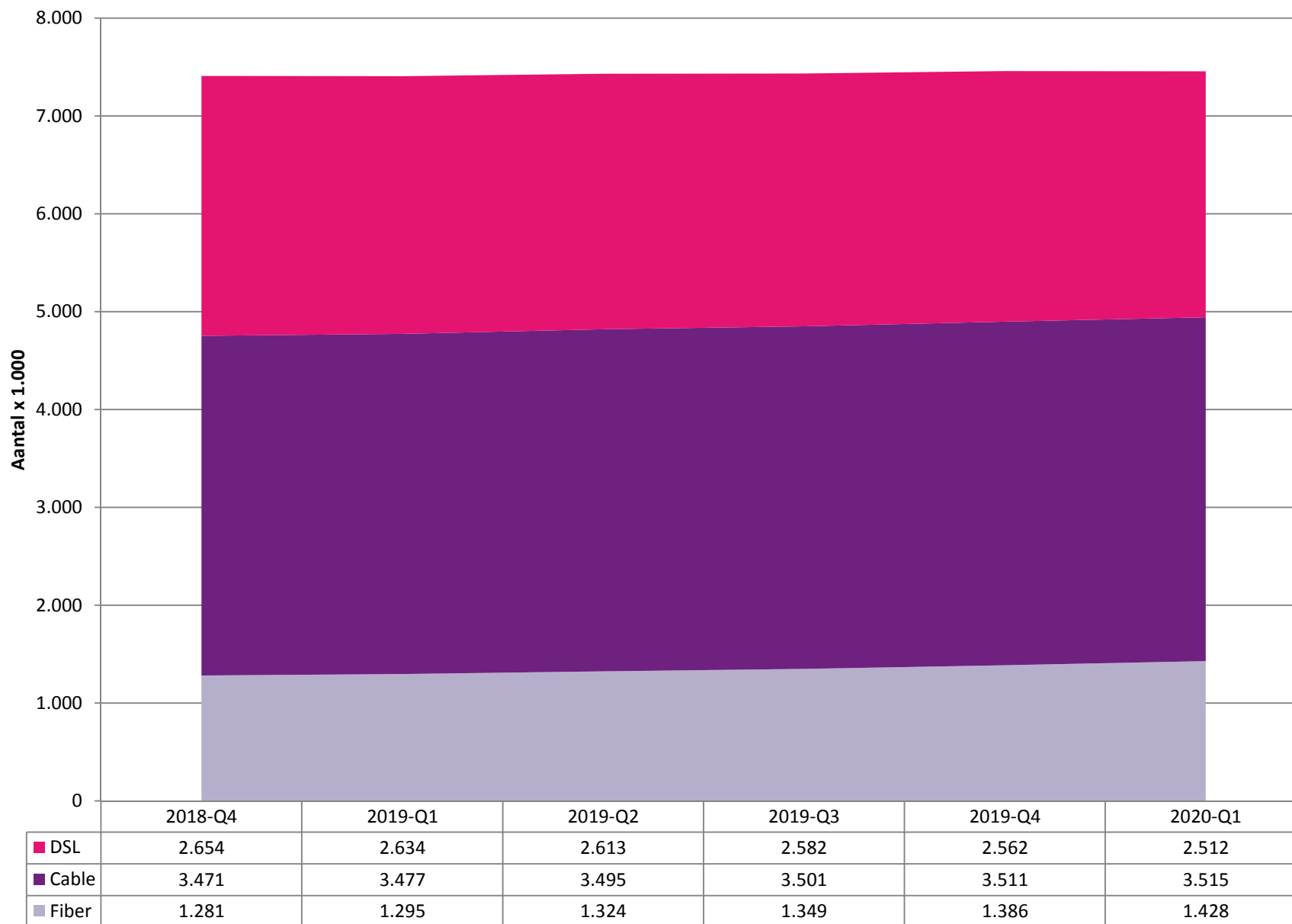
# Fixed telephony

## Retail turnover per type of traffic



# Broadband

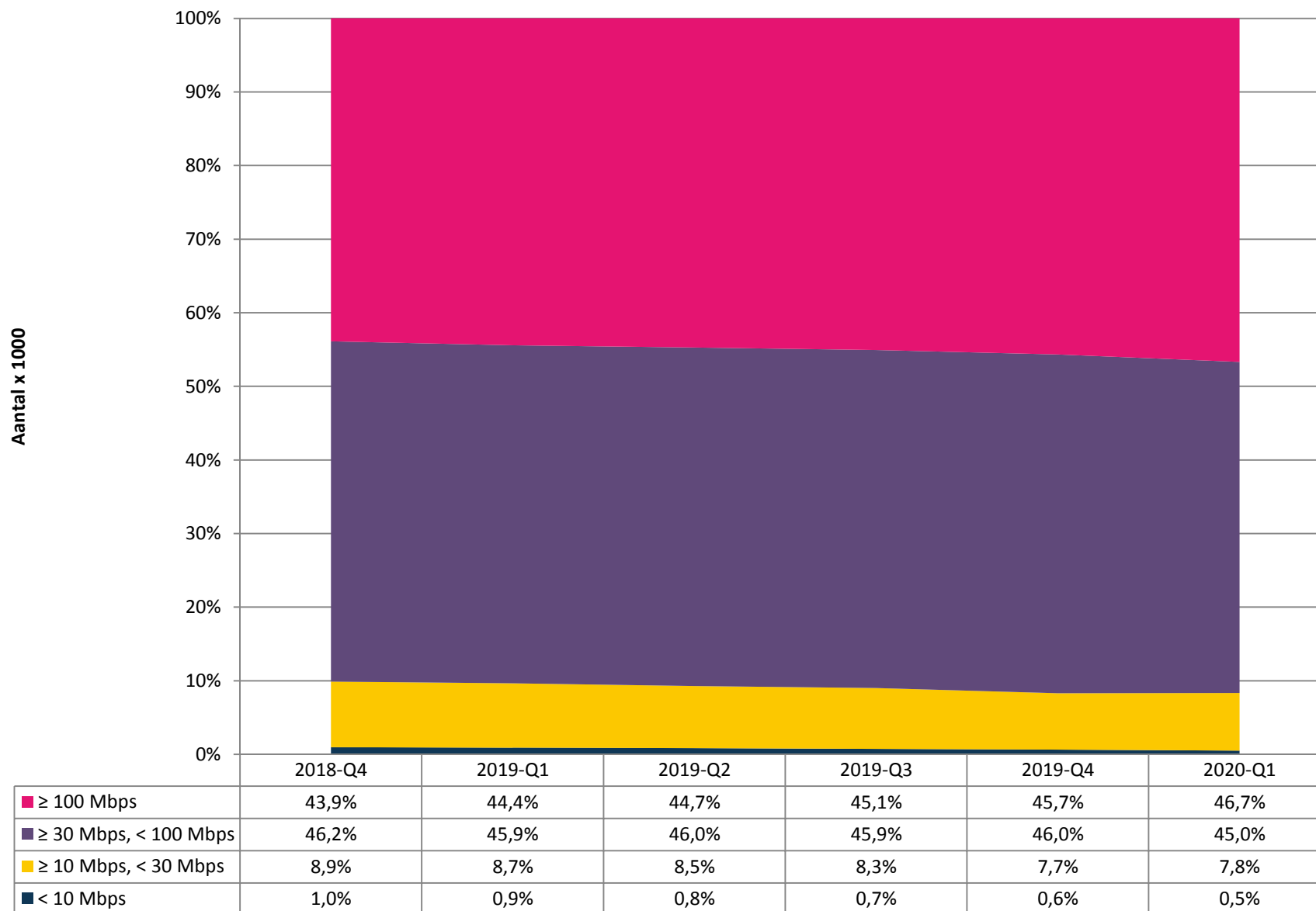
## Retail connections per type



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

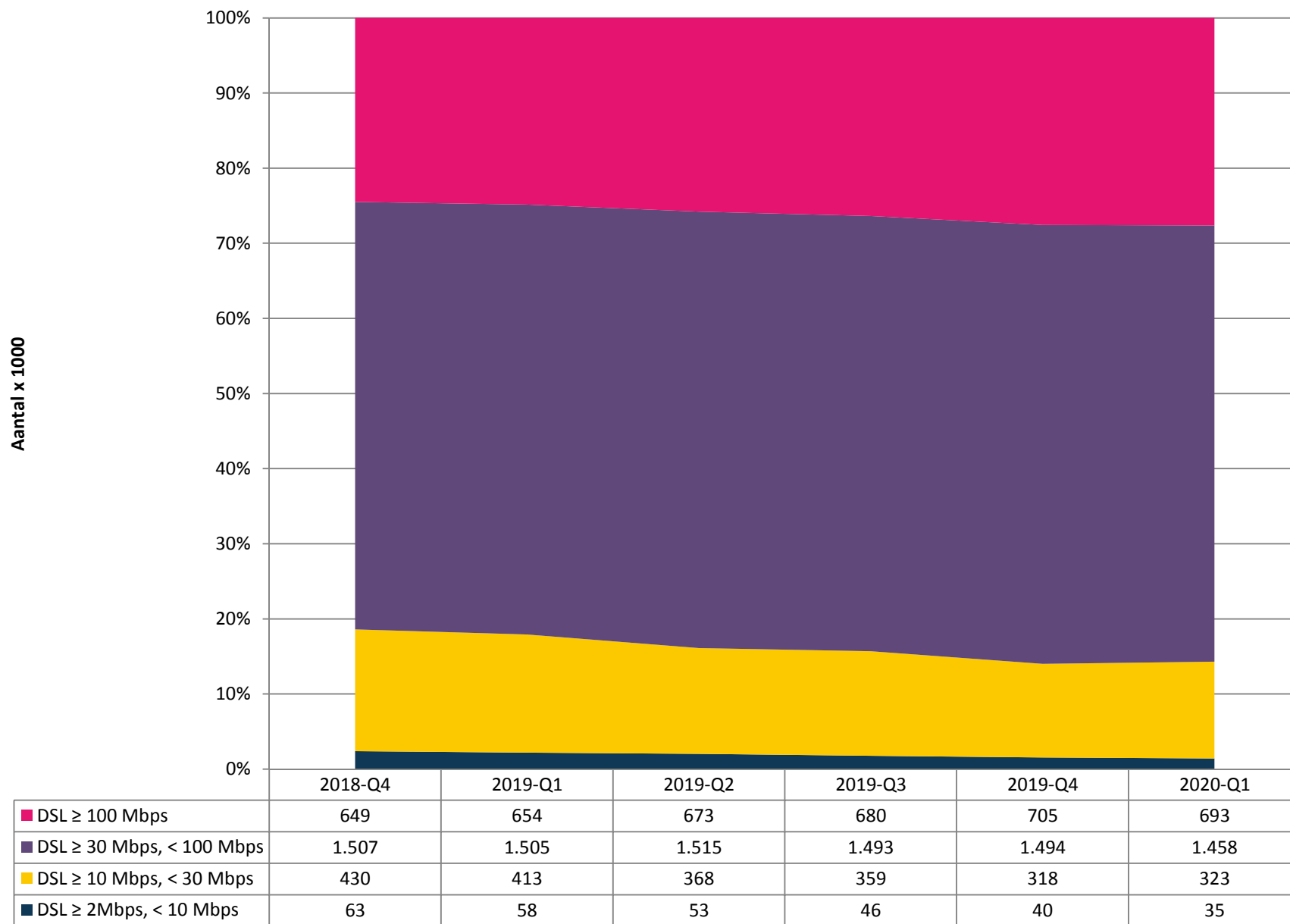
## Percentage retail connections by speed



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

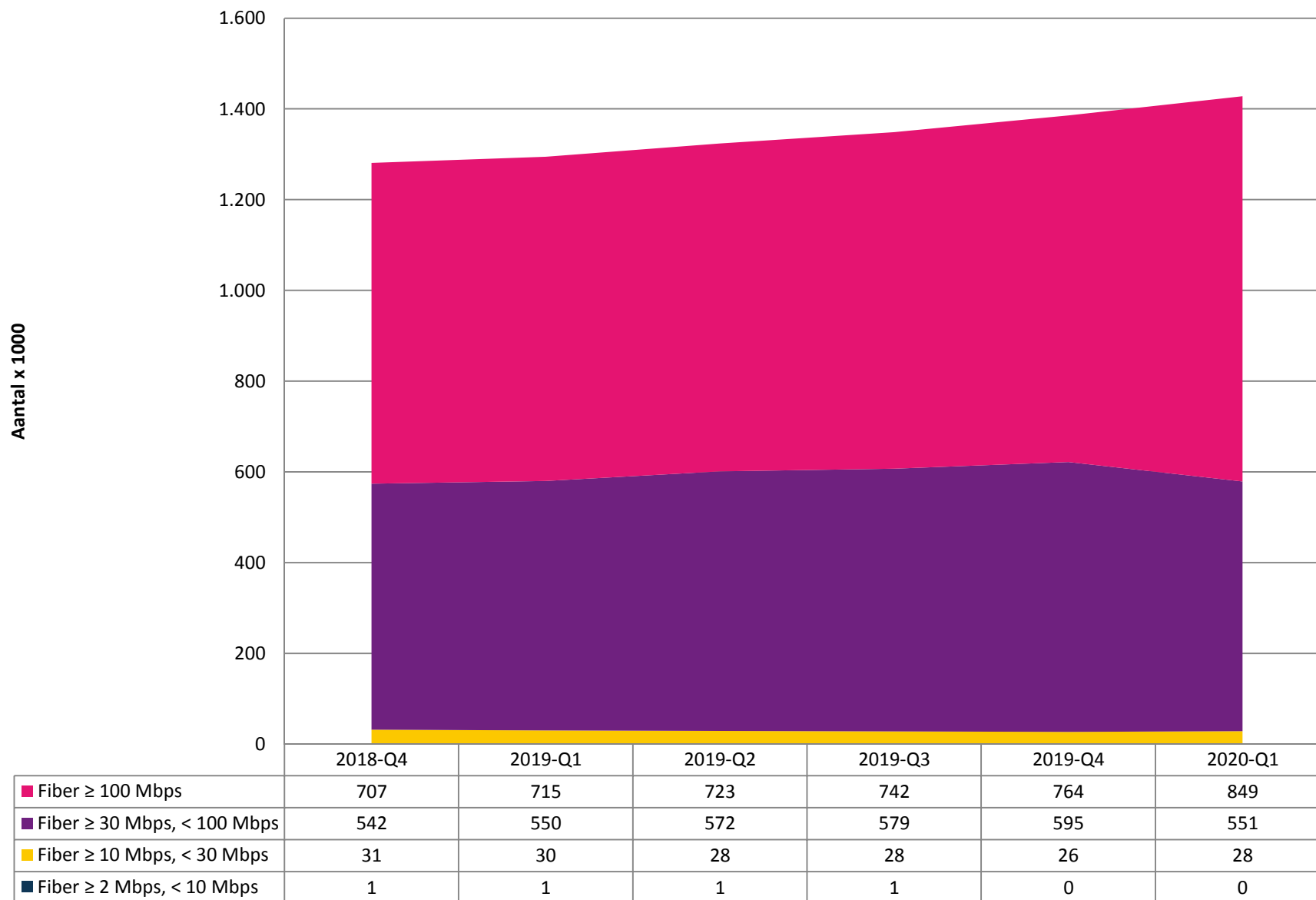
## Retail cable connections by speed



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

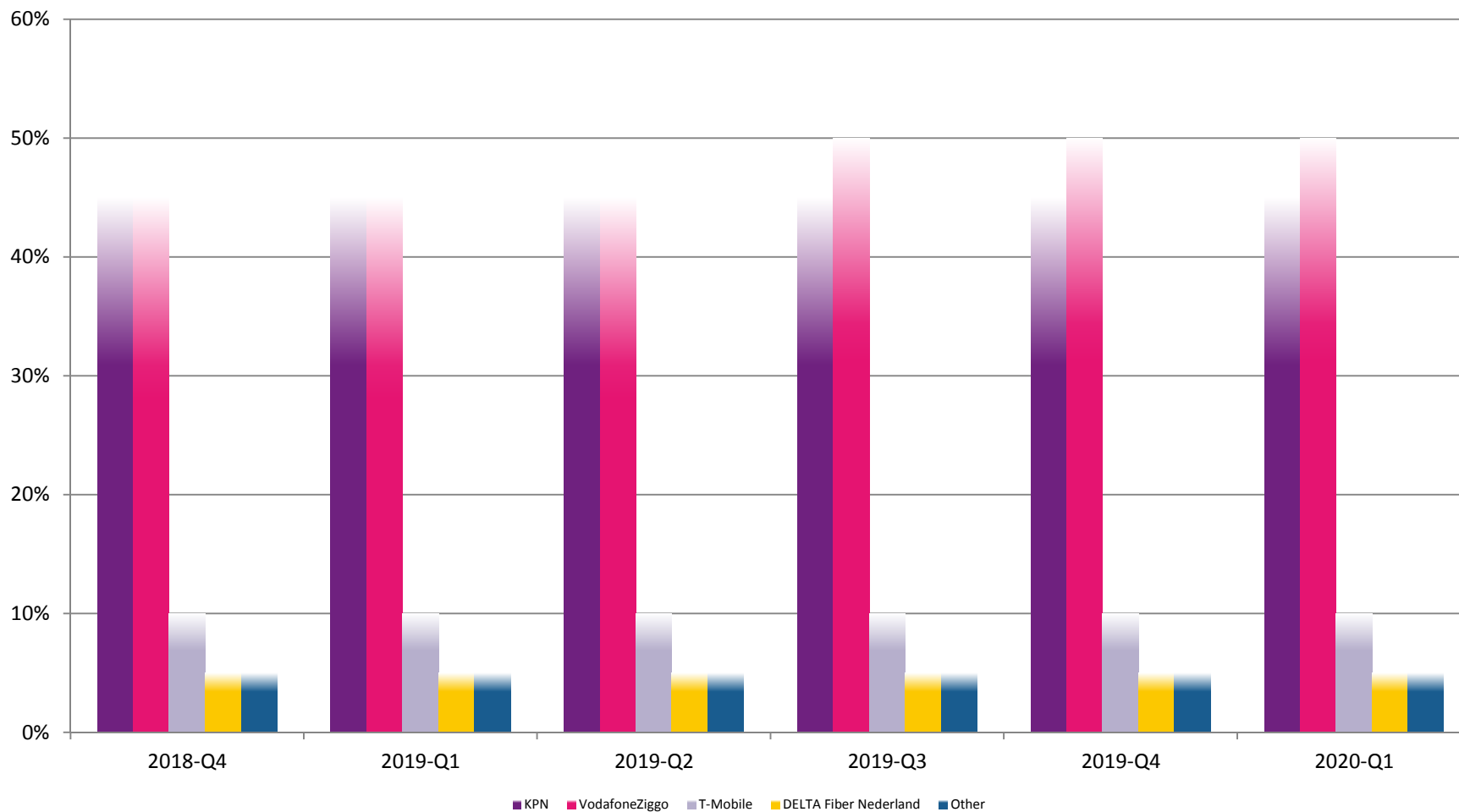


Op basis van vragen 30\_A1\_4\_1-2-3-4-5, en 30\_A1\_5\_1-2-3-4-5 van de Telecommonitor. Snelheid op basis van geadverteerde snelheid



# Broadband

## Retail market shares based on connections

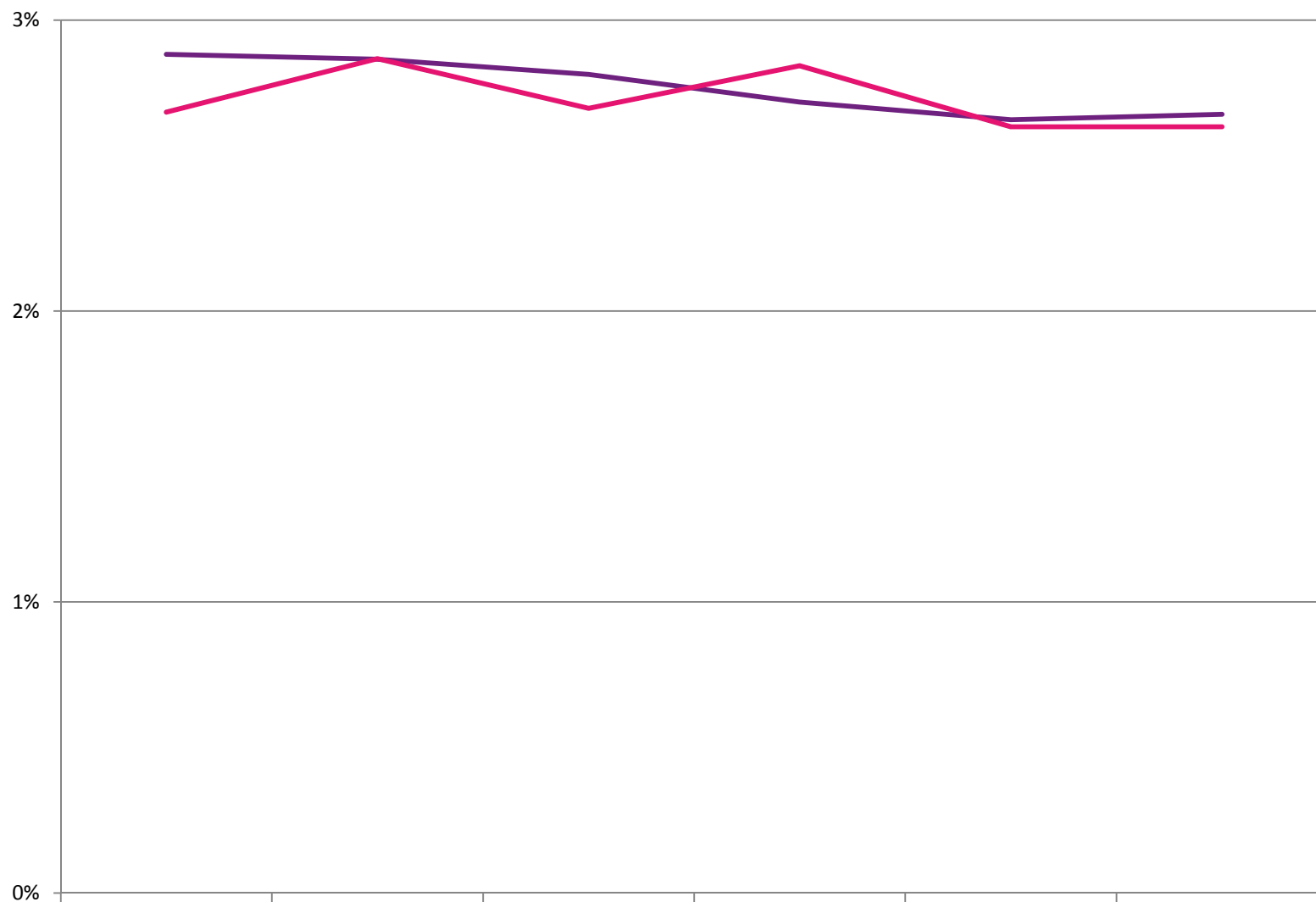


	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4	2020-Q1
KPN	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
VodafoneZiggo	[40 - 45%]	[40 - 45%]	[40 - 45%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 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 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

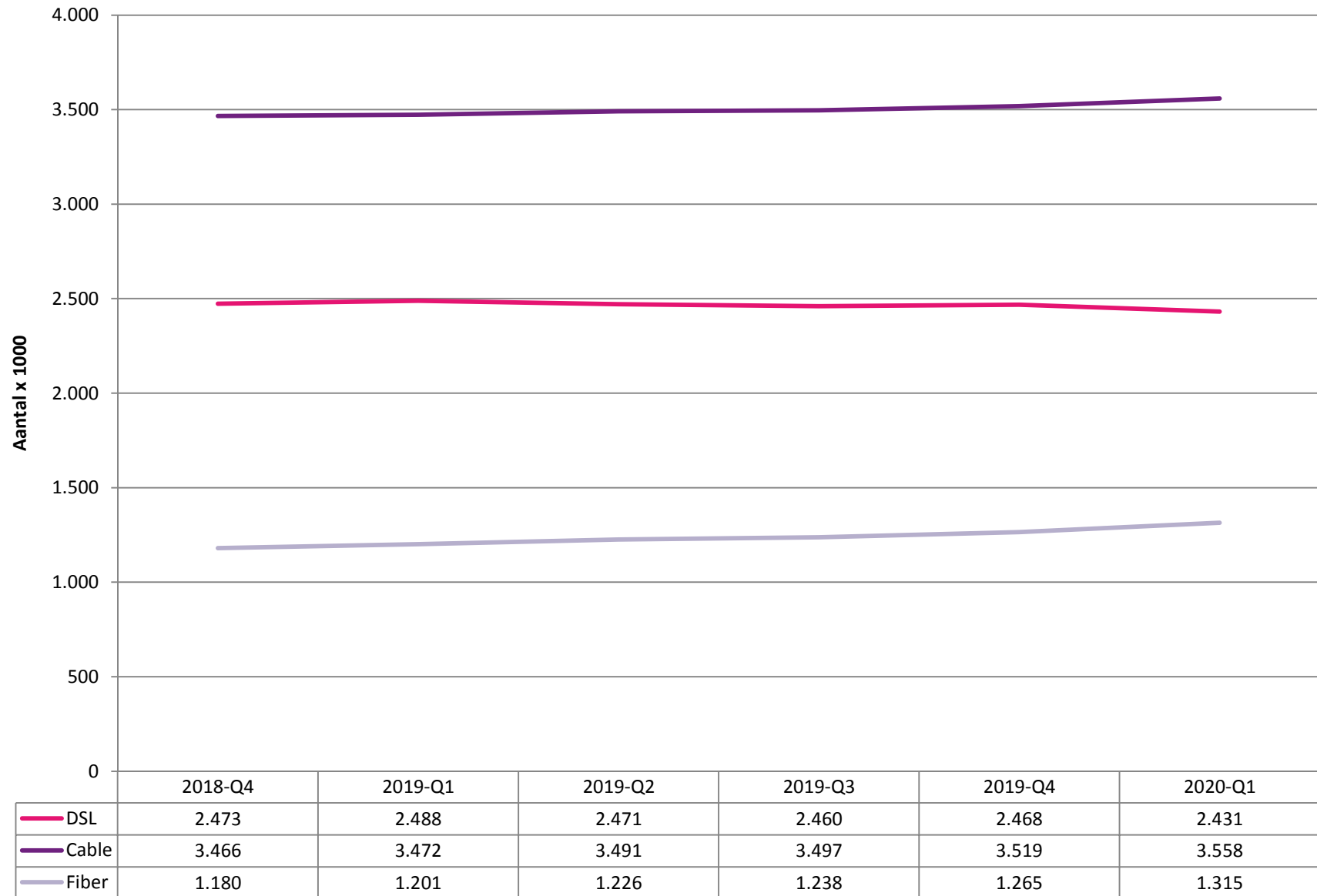
# Broadband

## Retail churn based on connections



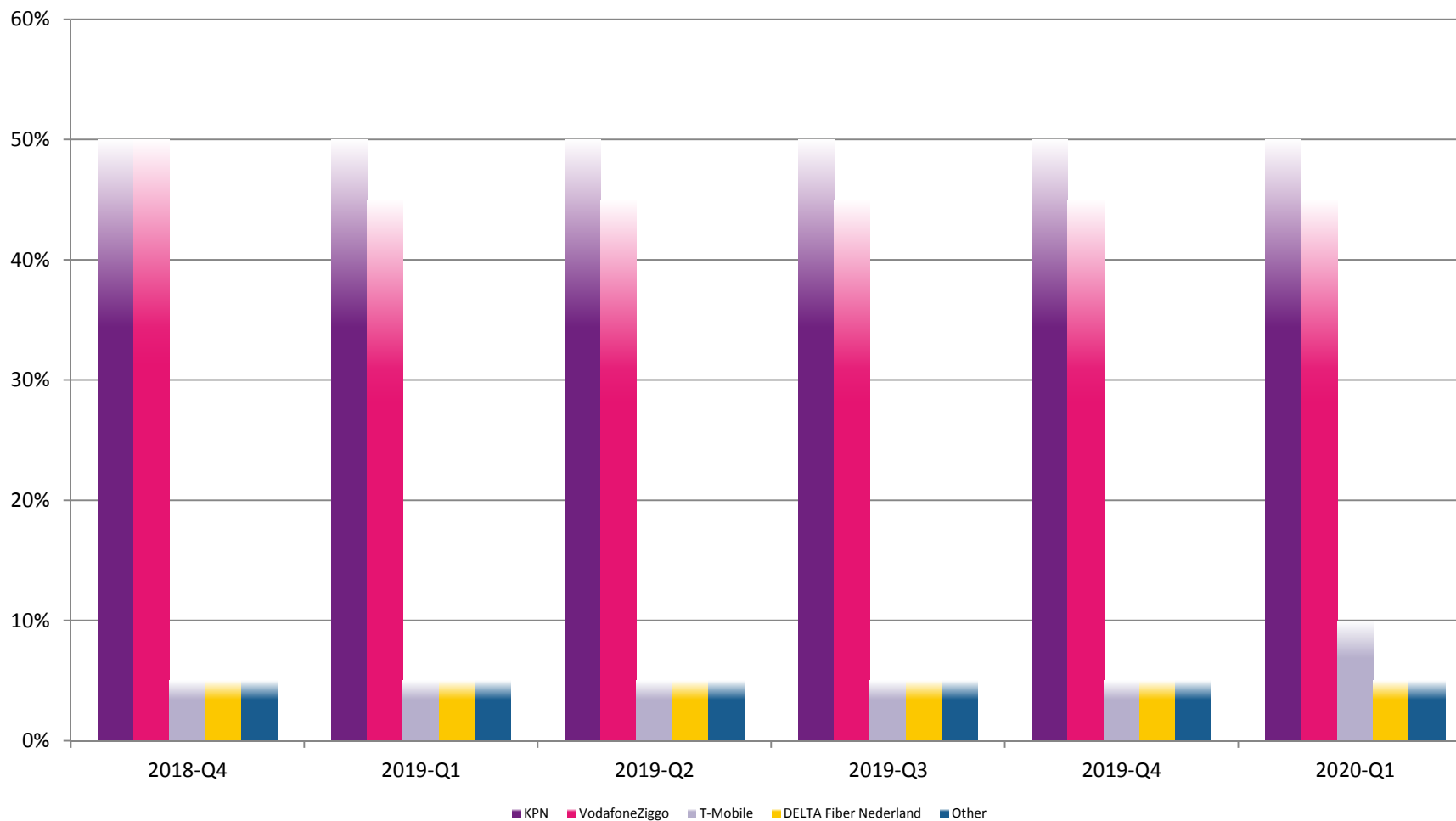
# Broadband

## Low-quality WBT-connections



# Broadband

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

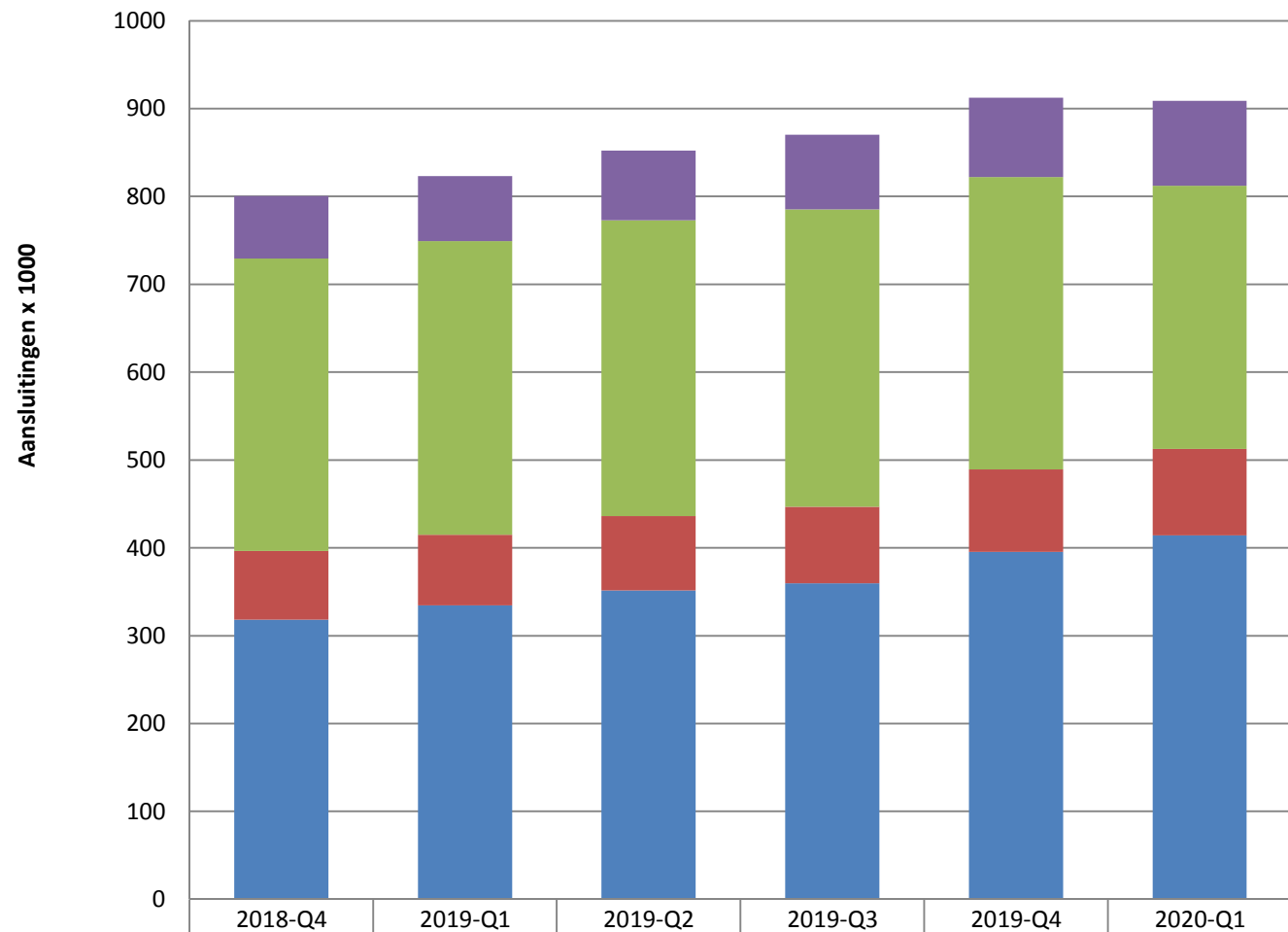


	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4	2020-Q1
KPN	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
VodafoneZiggo	[45 - 50%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
T-Mobile	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[5 - 10%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 5%]	[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\_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

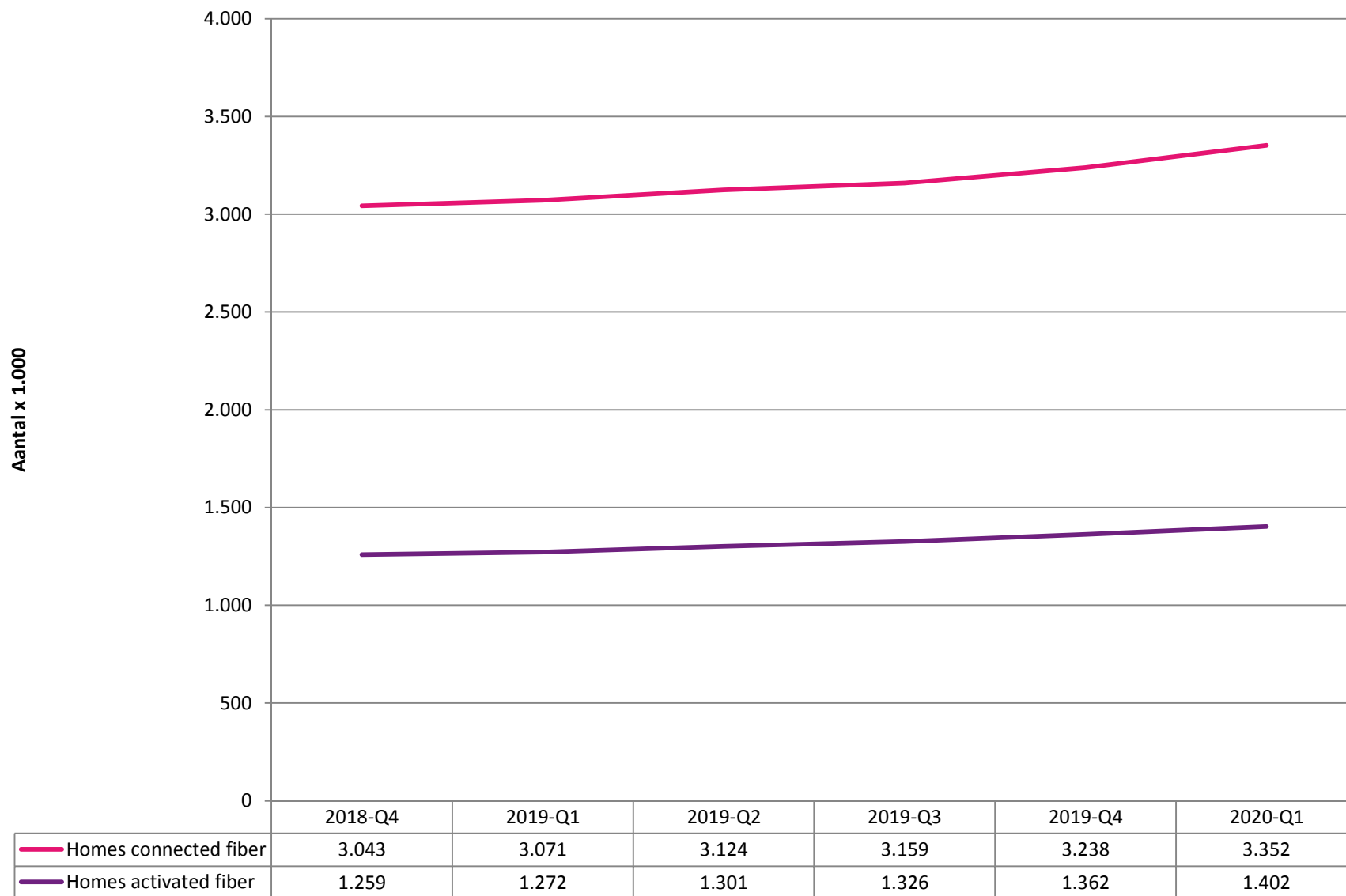


■ Unbundled Local Loop Fiber (FttH)	71	74	79	85	90	96
■ (Virtual) Unbundles Local Loop Copper	333	334	337	338	333	299
■ Purchase of active fiber optic connections (FttH)	78	80	84	87	94	99
■ Purchase of active copper connections	318	335	352	360	396	414

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

De aantallen voor Homes Connected glasvezel zijn met terugwerkende kracht gecorrigeerd met de toevoeging van Delta Fiber Nederland.

# Broadband

## Homes connected to upgraded copper



Aantal x 1.000



	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4	2020-Q1
Homes connected upgraded copper	4.048	4.144	4.246	4.337	4.399	4.525
Homes activated upgraded copper	1.397	1.456	1.501	1.526	1.586	1.614

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

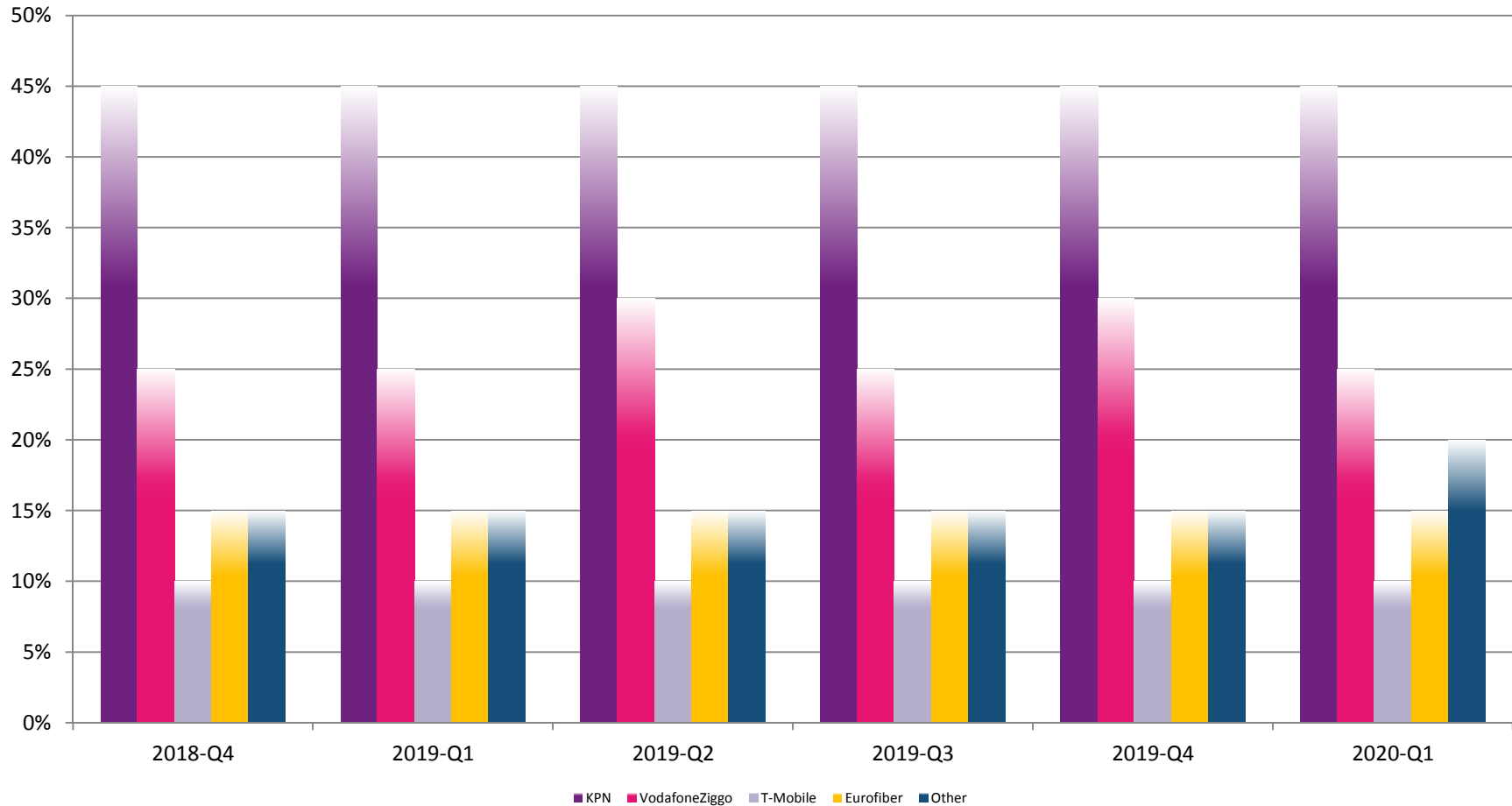


Op basis van vragen 30\_A2\_1\_1 van de Telecommonitor. Exclusief aansluitingen kleine en regionale marktpartijen



# Business network services

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

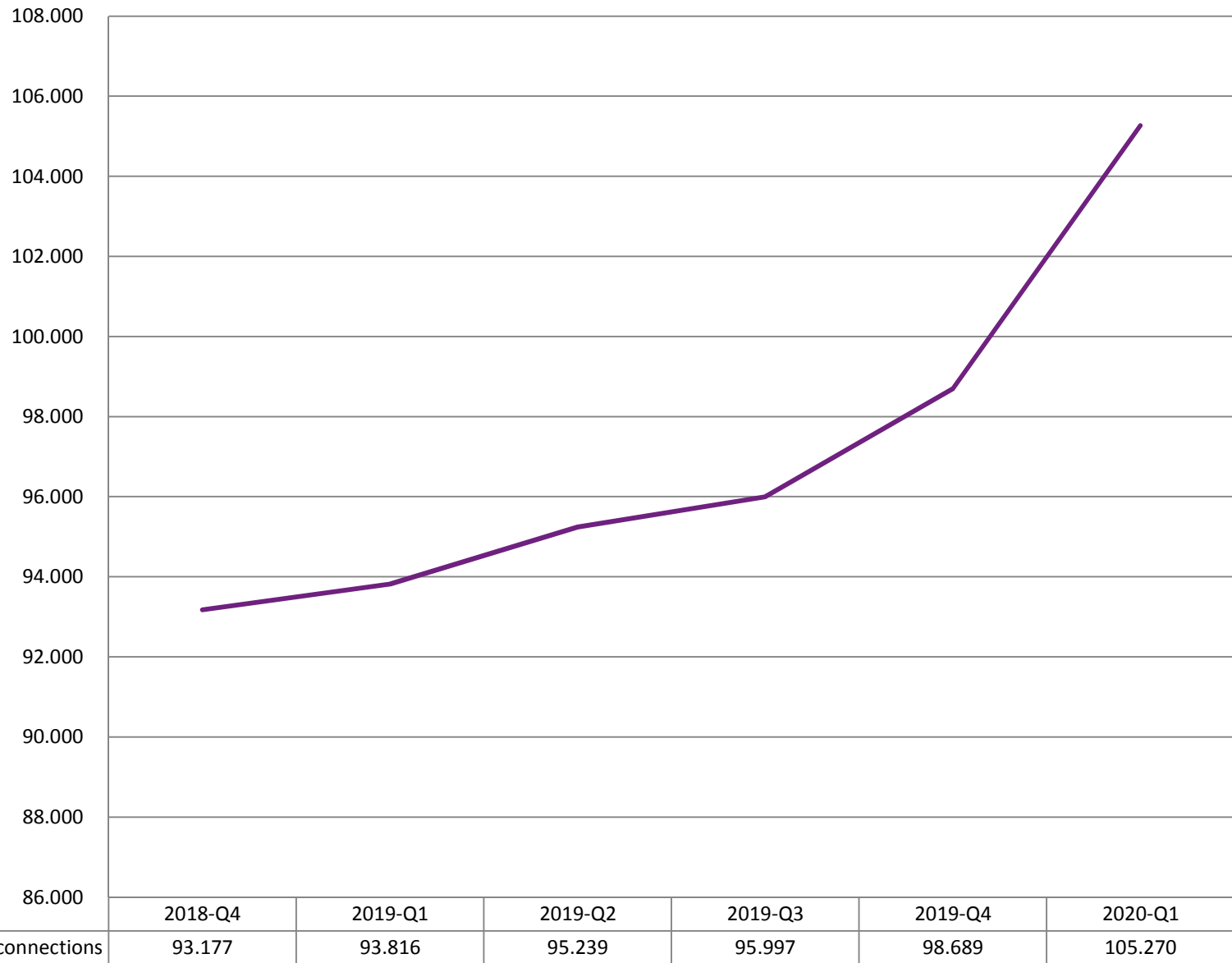


	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4	2020-Q1
KPN	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
VodafoneZiggo	[20 - 25%]	[20 - 25%]	[25 - 30%]	[20 - 25%]	[25 - 30%]	[20 - 25%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
Eurofiber	[10 - 15%]	[10 - 15%]	[10 - 15%]	[10 - 15%]	[10 - 15%]	[10 - 15%]
Other	[10 - 15%]	[10 - 15%]	[10 - 15%]	[10 - 15%]	[10 - 15%]	[15 - 20%]

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

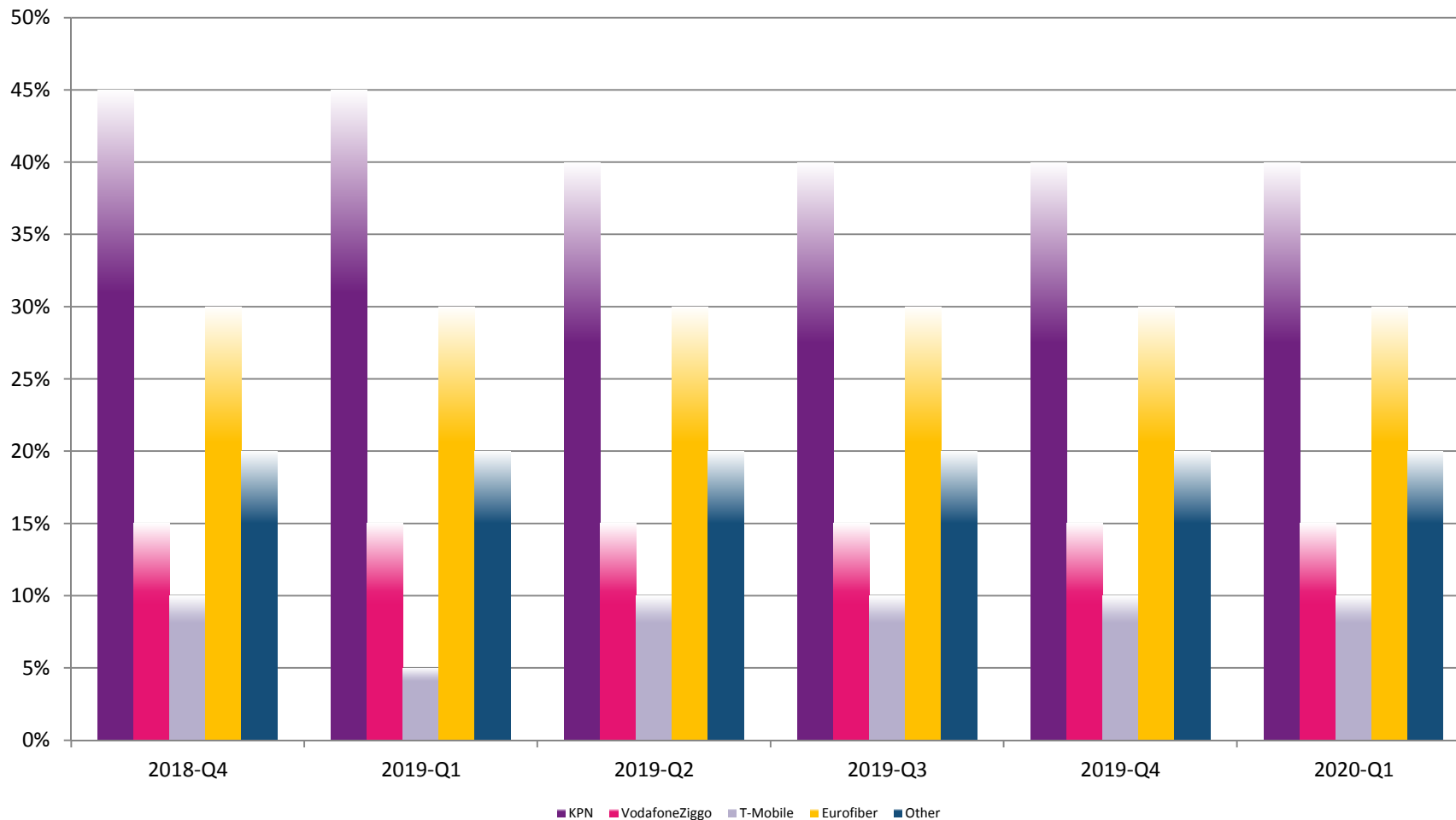
# Business network services

## Wholesale business fiber-optic connections



# Business network services

## Wholesale market share based on business fiber-optic connections



	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4	2020-Q1
KPN	[40 - 45%]	[40 - 45%]	[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%]	[0 - 5%]	[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

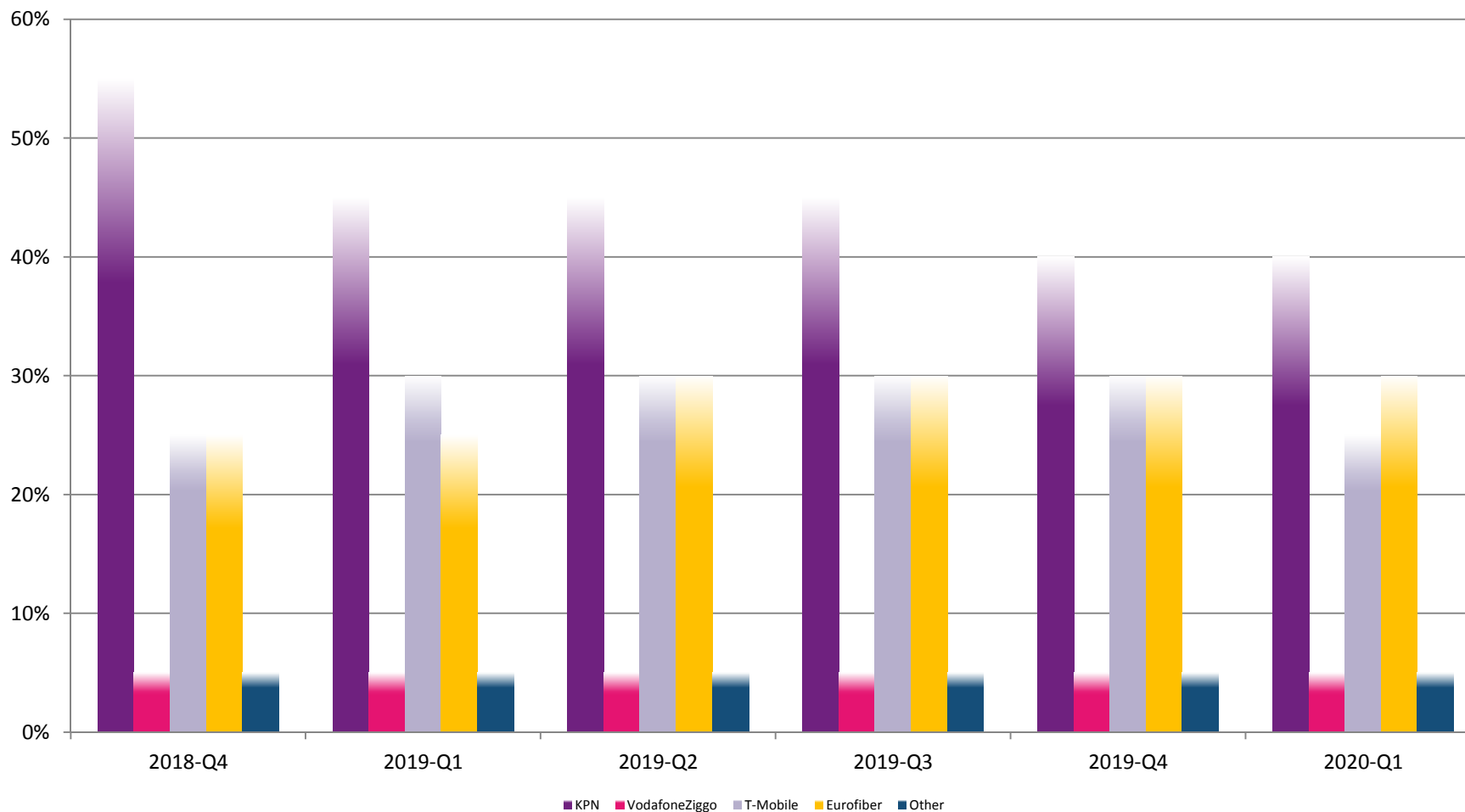
## Wholesale HKWBT and leased lines



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



	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4	2020-Q1
KPN	[50 - 55%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[35 - 40%]	[35 - 40%]
VodafoneZiggo	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
T-Mobile	[20 - 25%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[20 - 25%]
Eurofiber	[20 - 25%]	[20 - 25%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
Other	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]

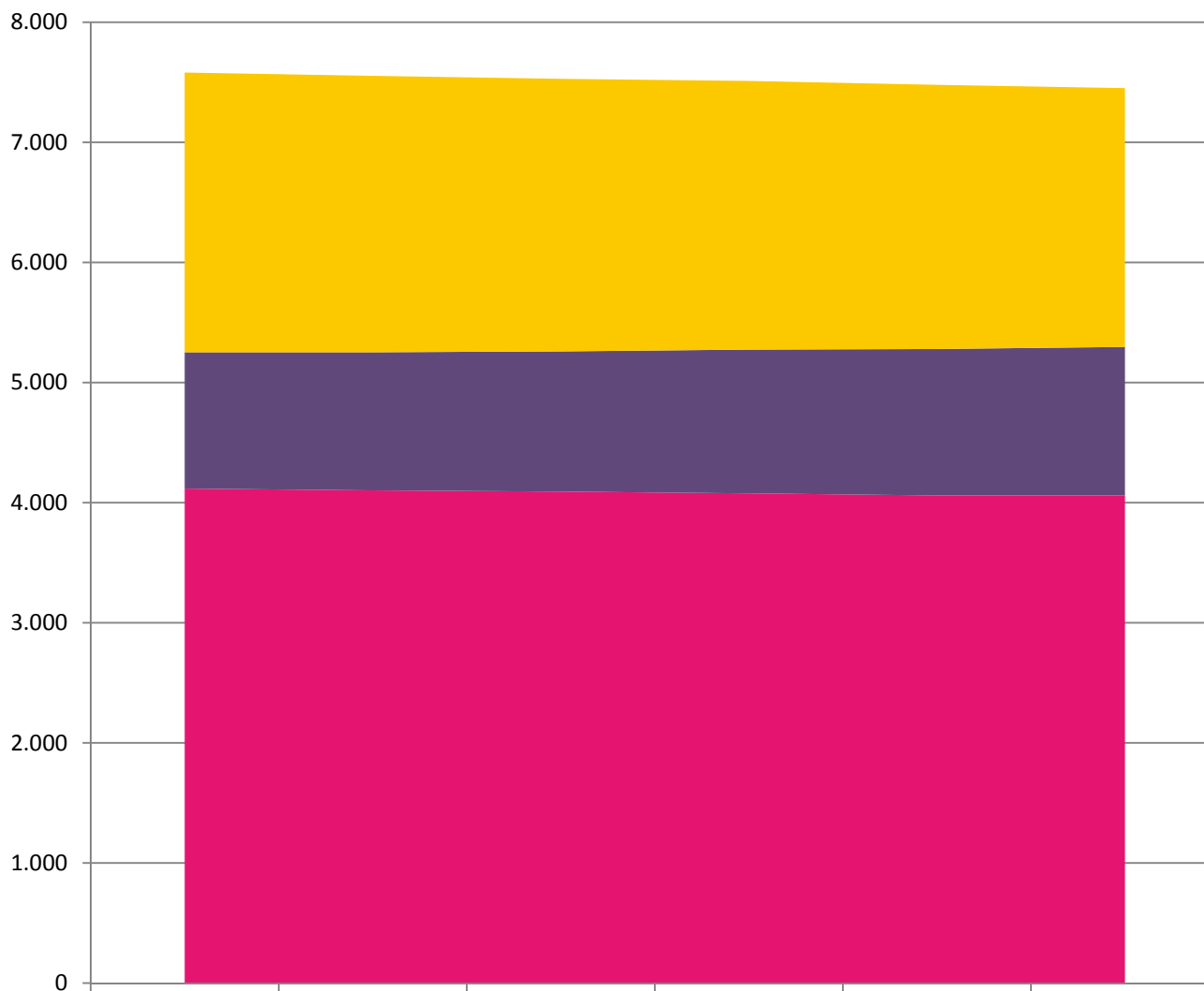
Op basis van vragen 30\_A2\_4\_1, 30\_B2\_1\_b-c-d, 30\_B2\_2\_1-2-3, 30\_B4\_3\_b-c-d-e, 30\_B4\_4\_1-2-3-4, 30\_B4\_6\_b-c, 30\_B4\_7\_1-2 en 30\_B4\_8\_1 van de Telecommonitor. De cijfers zijn gebaseerd op de marktafbakening die volgt uit het marktanalysebesluit HKWBT/HL 2012

# Television

## Retail subscriptions per connection type



Aantal x 1.000

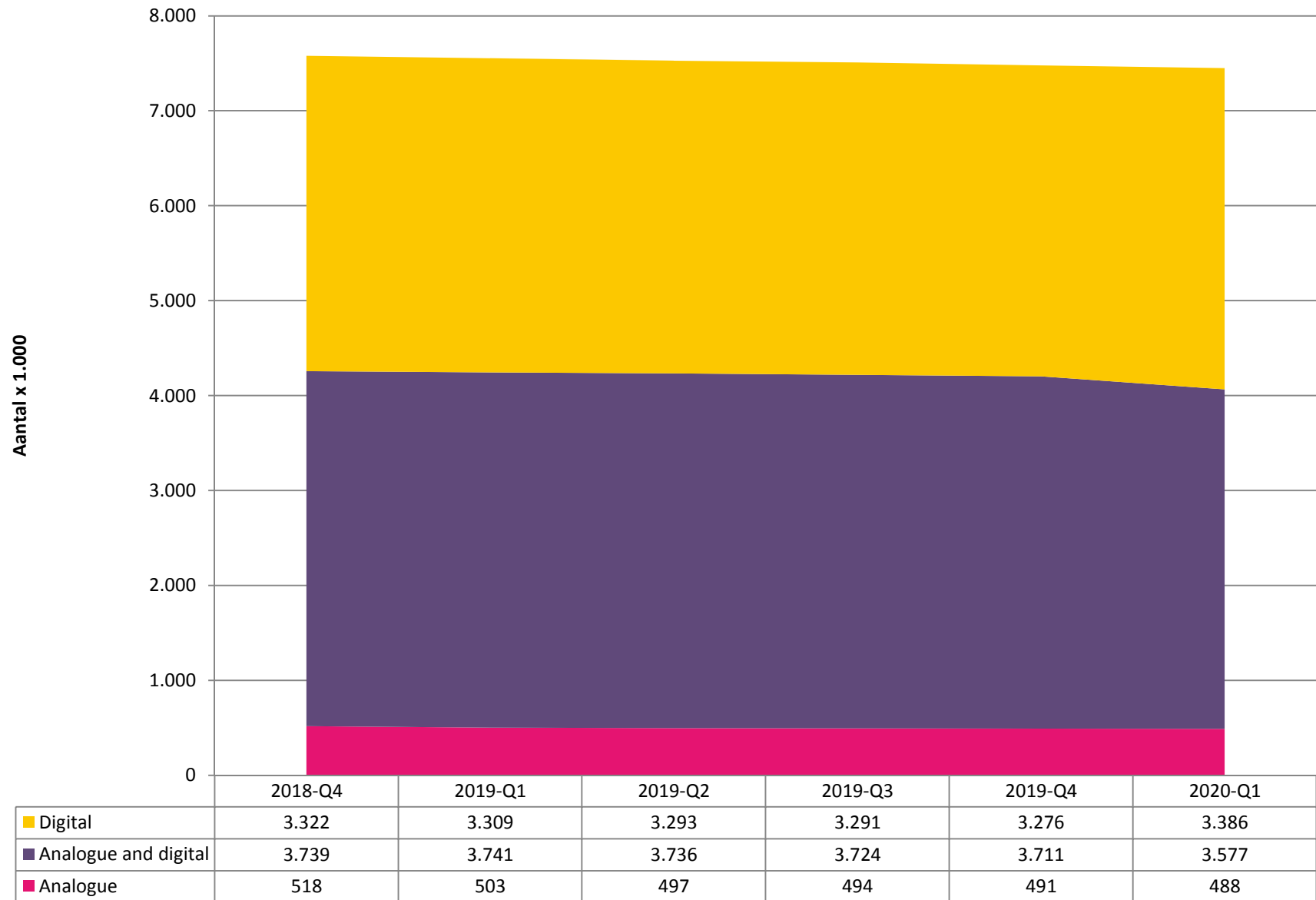


	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4	2020-Q1
■ Digital platforms (DSL, Digitenne, Satellite)	2.329	2.302	2.270	2.236	2.199	2.155
■ Fiber	1.134	1.149	1.167	1.197	1.218	1.237
■ Cable	4.117	4.102	4.090	4.077	4.060	4.058

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

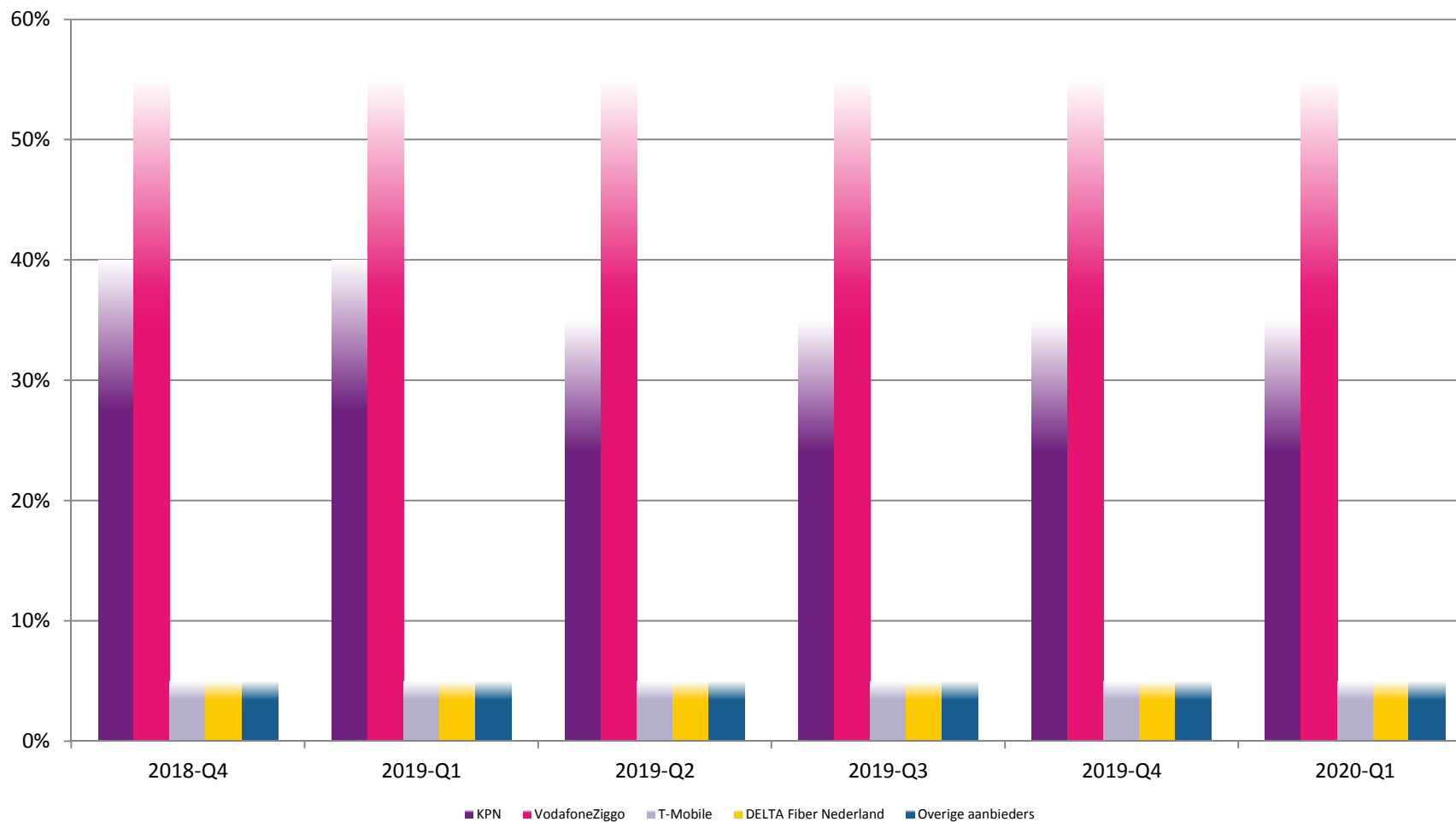
## Digitalization of television subscriptions



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



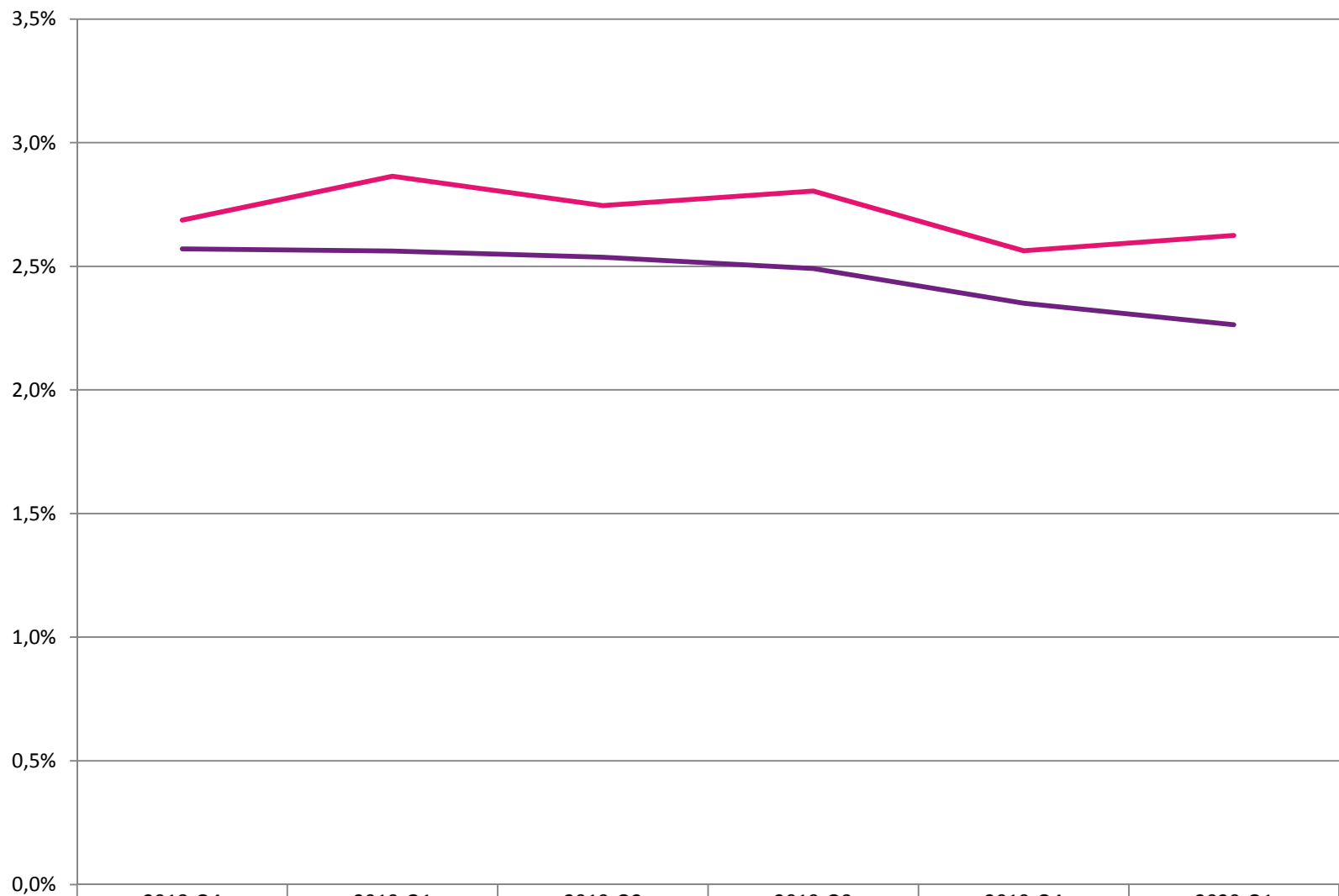
	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4	2020-Q1
KPN	[35 - 40%]	[35 - 40%]	[30 - 35%]	[30 - 35%]	[30 - 35%]	[30 - 35%]
VodafoneZiggo	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]
T-Mobile	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 5%]	[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

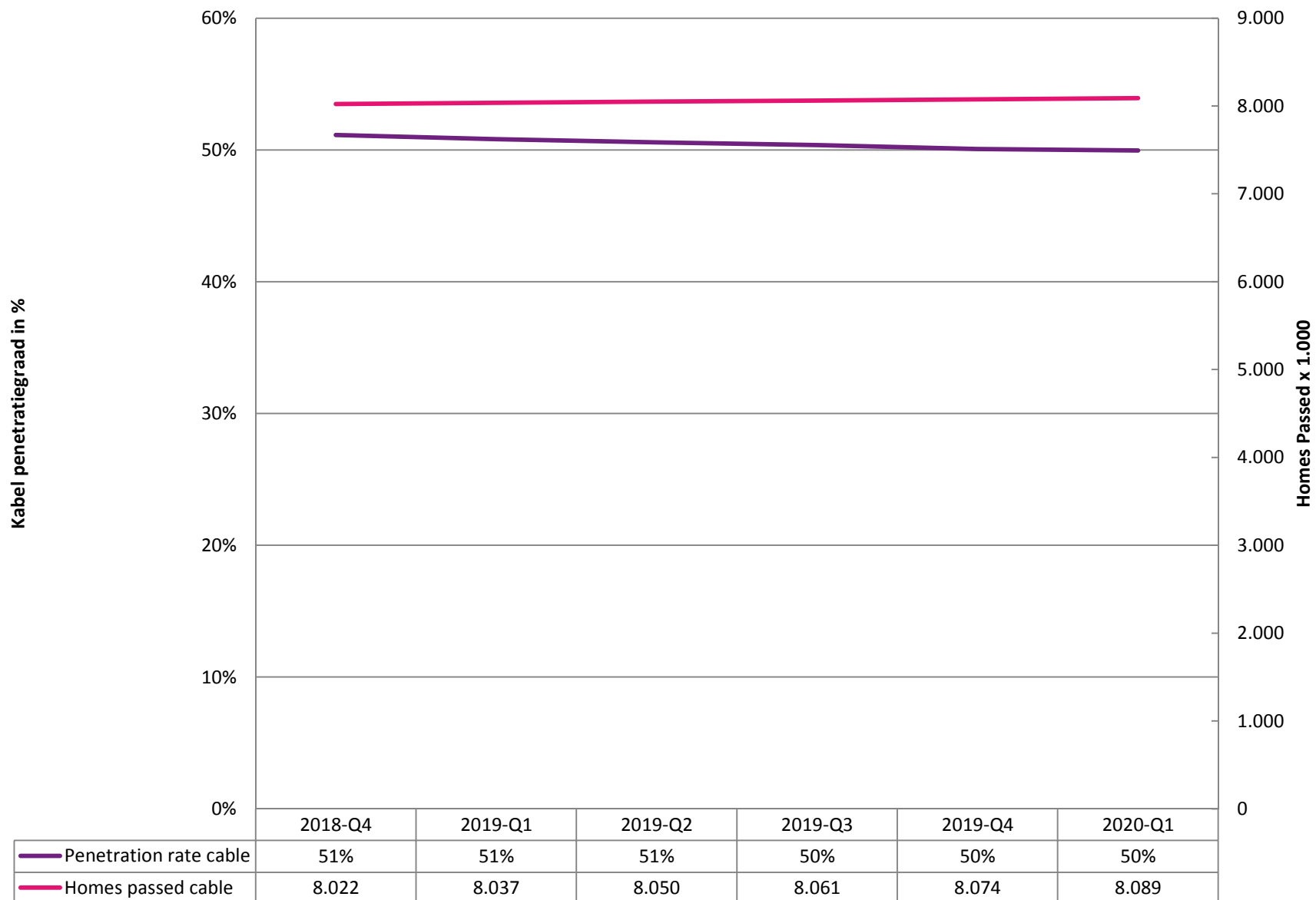
## Retail turnover of radio/tv subscriptions



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

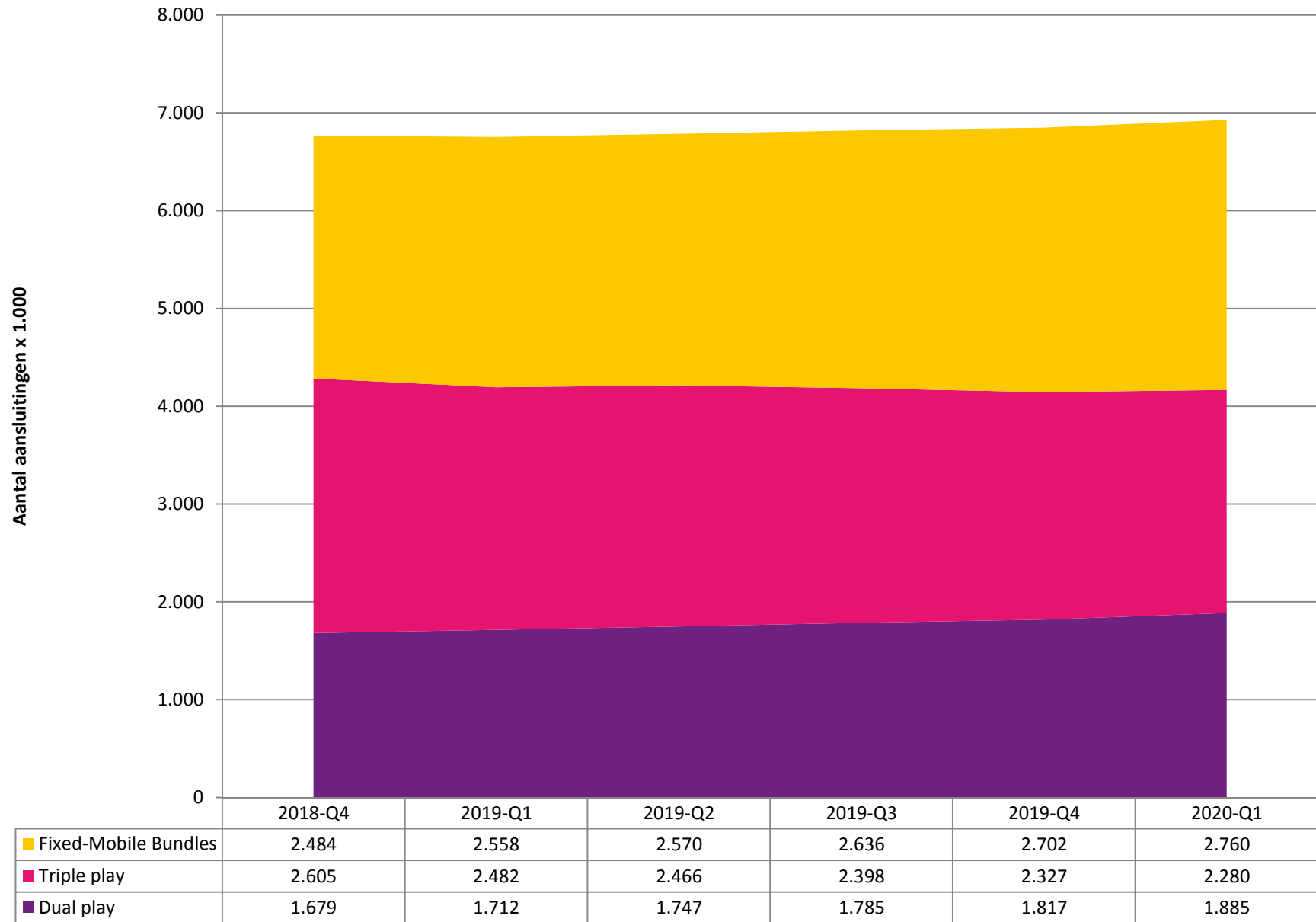


Op basis van vragen 40\_A1\_1\_1-2-3, 40\_A1\_2\_1-2, 40\_A1\_3\_1-2-3, en 40\_A1\_4\_1-2-3-4 van de Telecommonitor

De aantallen voor Homes Passed zijn met terugwerkende kracht gecorrigeerd. Het betreft een correctie van +/- 117.000 aansluitingen t.o.v. eerdere rapportages.

# Bundles

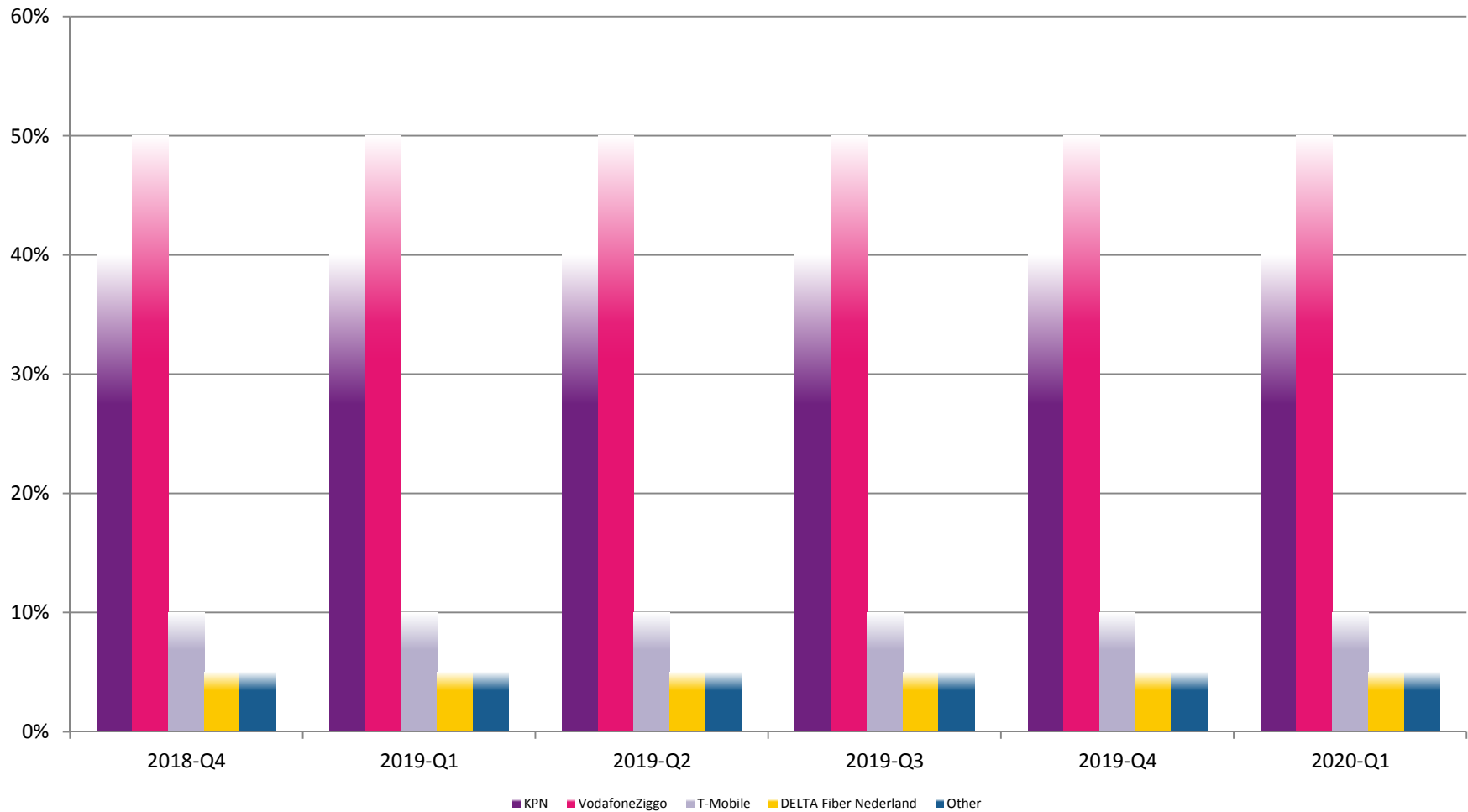
## Retail connections of bundles



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

# Bundles

## Retail market share of bundles



	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4	2020-Q1
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 connections with broadband



	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4	2020-Q1
■ Broadband in Fixed-Mobile	24%	24%	24%	25%	25%	25%
■ Broadband in triple play	44%	43%	42%	42%	41%	41%
■ Broadband in dual play	24%	24%	24%	25%	25%	26%
■ Broadband only	9%	9%	9%	8%	8%	7%

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



	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4	2020-Q1
■ TV in Fixed-Mobile	23%	23%	23%	24%	24%	24%
■ TV in triple play	40%	39%	39%	39%	39%	39%
■ TV in dual play	16%	17%	18%	18%	19%	20%
■ TV only	21%	21%	20%	19%	18%	16%

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



	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4	2020-Q1
■ Fixed telephony in Fixed-Mobile	30%	31%	32%	33%	34%	34%
■ Fixed telephony in triple play	46%	45%	45%	44%	44%	43%
■ Fixed telephony in dual play	7%	7%	7%	7%	6%	6%
■ Fixed telephony only	18%	18%	16%	17%	16%	16%

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

Algemeen		Mobiel	Vaste telefonie	
AT&T	MTTM	KPN	AT&T	T-Mobile
BT	Pretium	T-Mobile	BT	Verizon
CAIW	Stipte	VodafoneZiggo	CAIW	VodafoneZiggo
CanalDigitaal	Tele2	Tele2	CanalDigitaal	
CIF	T-Mobile		Colt	
Cogas	Verizon		Delta	
Colt	VodafoneZiggo		KPN	
Delta			MTTM	
Easynet			Pretium	
Eurofiber			Stipte	
KPN			Tele2	
Breedband en netwerkdiensten		Televisie	Bundels	
AT&T	KPN	CAIW	CAIW	VodafoneZiggo
BT	Tele2	CanalDigitaal	CanalDigitaal	
CAIW	T-Mobile	Cogas	Cogas	
CanalDigitaal	Verizon	Delta	Delta	
Colt	VodafoneZiggo	KPN	KPN	
Delta		Tele2	Stipte	
Easynet		T-Mobile	Tele2	
Eurofiber		VodafoneZiggo	T-Mobile	

