

Autoriteit
Consument & Markt



Telecom Monitor

Q2 2021

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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Remarks and corrections

(dutch)

Breedband

- **Lage kwaliteit WBT aansluitingen (p.29, 31 en 33):** Voor de periode Q2 2021 en eerder heeft er een correctie plaatsgevonden in de aantallen voor lage kwaliteit wholesale breedbandtoegang (WBT) aansluitingen.

Zakelijke netwerkdiensten

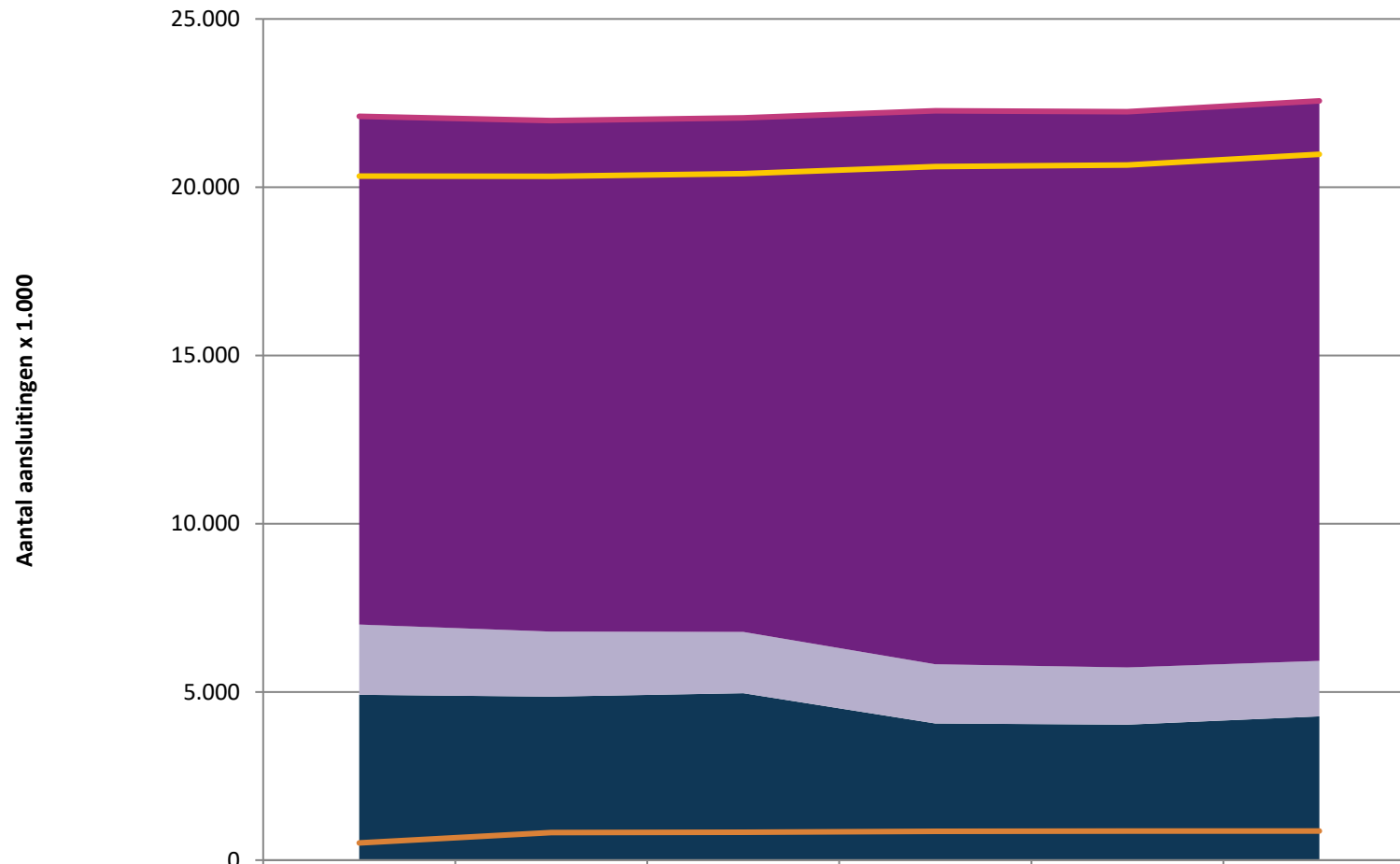
- **Wholesale HWT en huurlijnen:** Naar aanleiding van het geconsulteerde ontwerp marktanalysebesluit hoogwaardige wholesaletoeegang (HWT) van de ACM, hebben enkele partijen de eerder ten behoeve van de Telecommonitor aangeleverde gegevens herzien. De ACM is bezig met het onderzoek van de nieuwe gegevens. In afwachting van de uitkomsten van dit onderzoek worden in deze rapportage van de Telecommonitor geen cijfers en marktaandelen gepubliceerd van wholesale HWT en huurlijnen.

Televisie

- **Churn / overstap televisie abonneemnten:** Voor de periode Q4 2020 heeft een correctie plaatsgevonden in de churn overstap gegevens. In eerdere rapportages was het percentage van overstappers te hoog gerapporteerd vanwege de migratie van klantgegevens van een van de bevraagde partijen. In deze rapportage is hiervoor gecorrigeerd.

Mobile

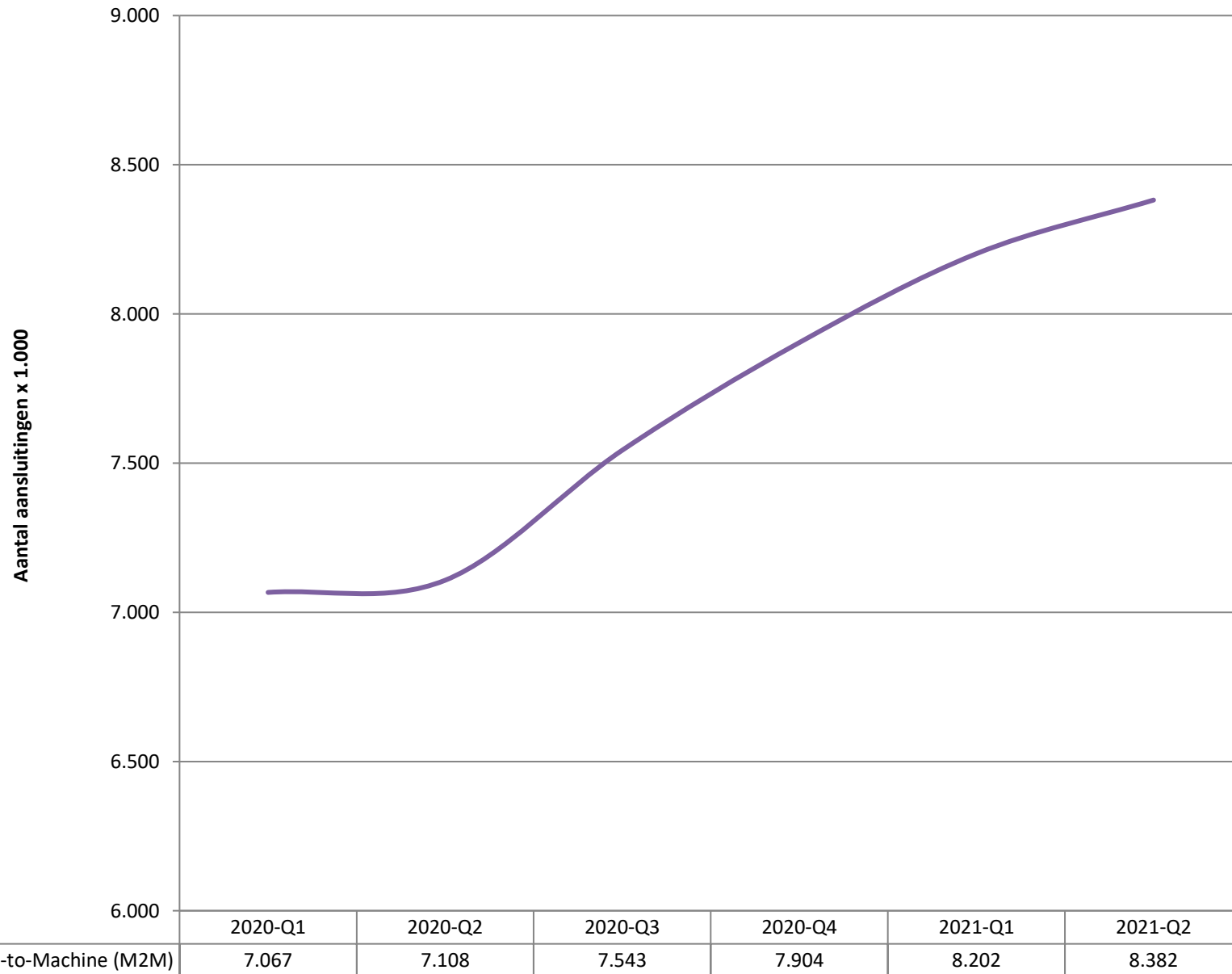
Retail connections



| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|------------------------------------|---------|---------|---------|---------|---------|---------|
| Postpaid MNO | 15.097 | 15.186 | 15.273 | 16.450 | 16.520 | 16.647 |
| Prepaid MNO | 2.095 | 1.932 | 1.825 | 1.756 | 1.698 | 1.647 |
| Postpaid and prepaid MVNO | 4.910 | 4.862 | 4.962 | 4.065 | 4.029 | 4.271 |
| Total mobile connections | 22.102 | 21.979 | 22.059 | 22.270 | 22.247 | 22.565 |
| Of which bundled (data and speech) | 20.333 | 20.323 | 20.403 | 20.610 | 20.661 | 20.978 |
| Of which data only connections | 512 | 821 | 832 | 855 | 864 | 861 |

Mobile

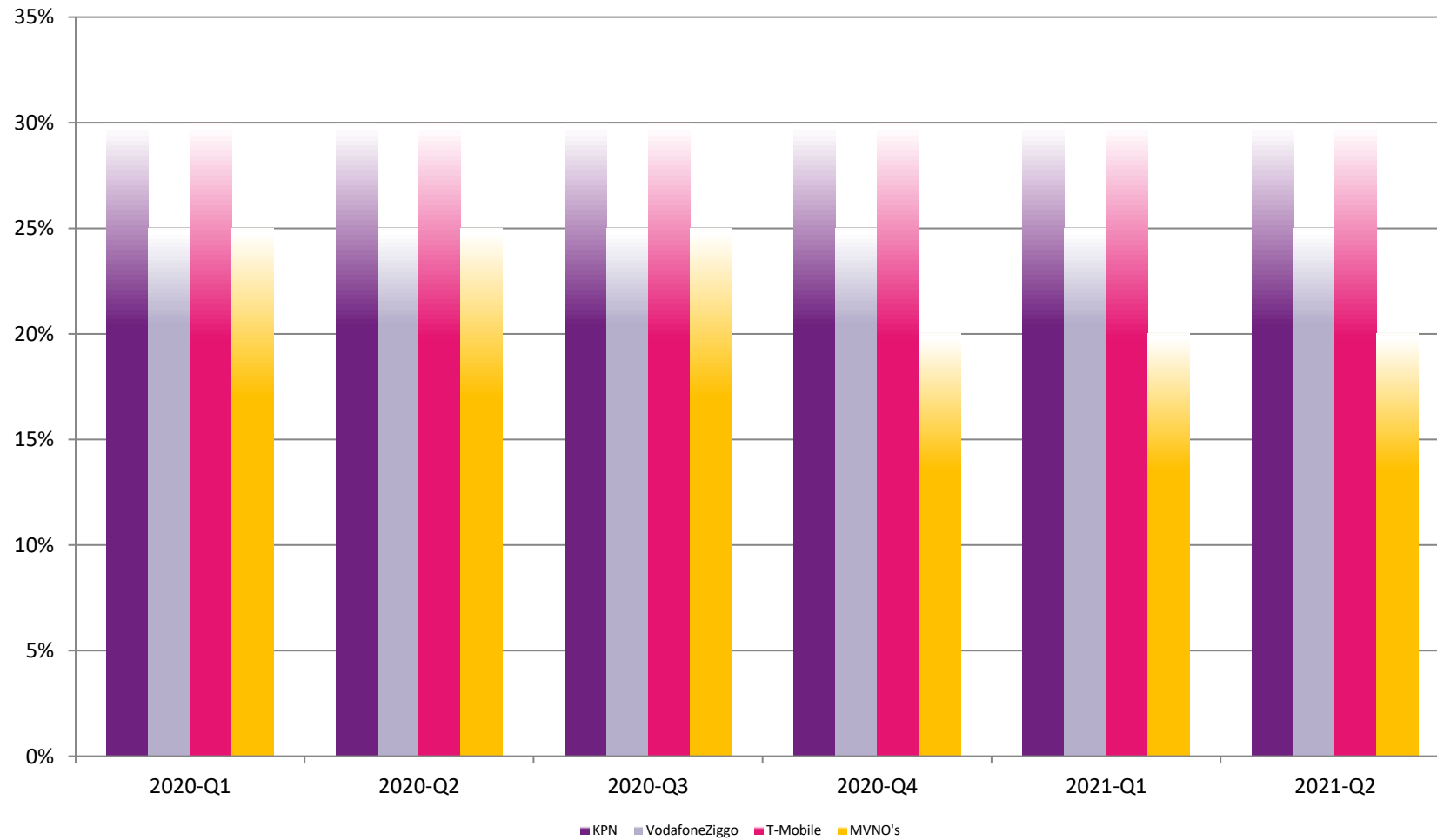
Machine-to-Machine connections



Op basis van vragen 10_A1_4_1 van de Telecommonitor

Mobile

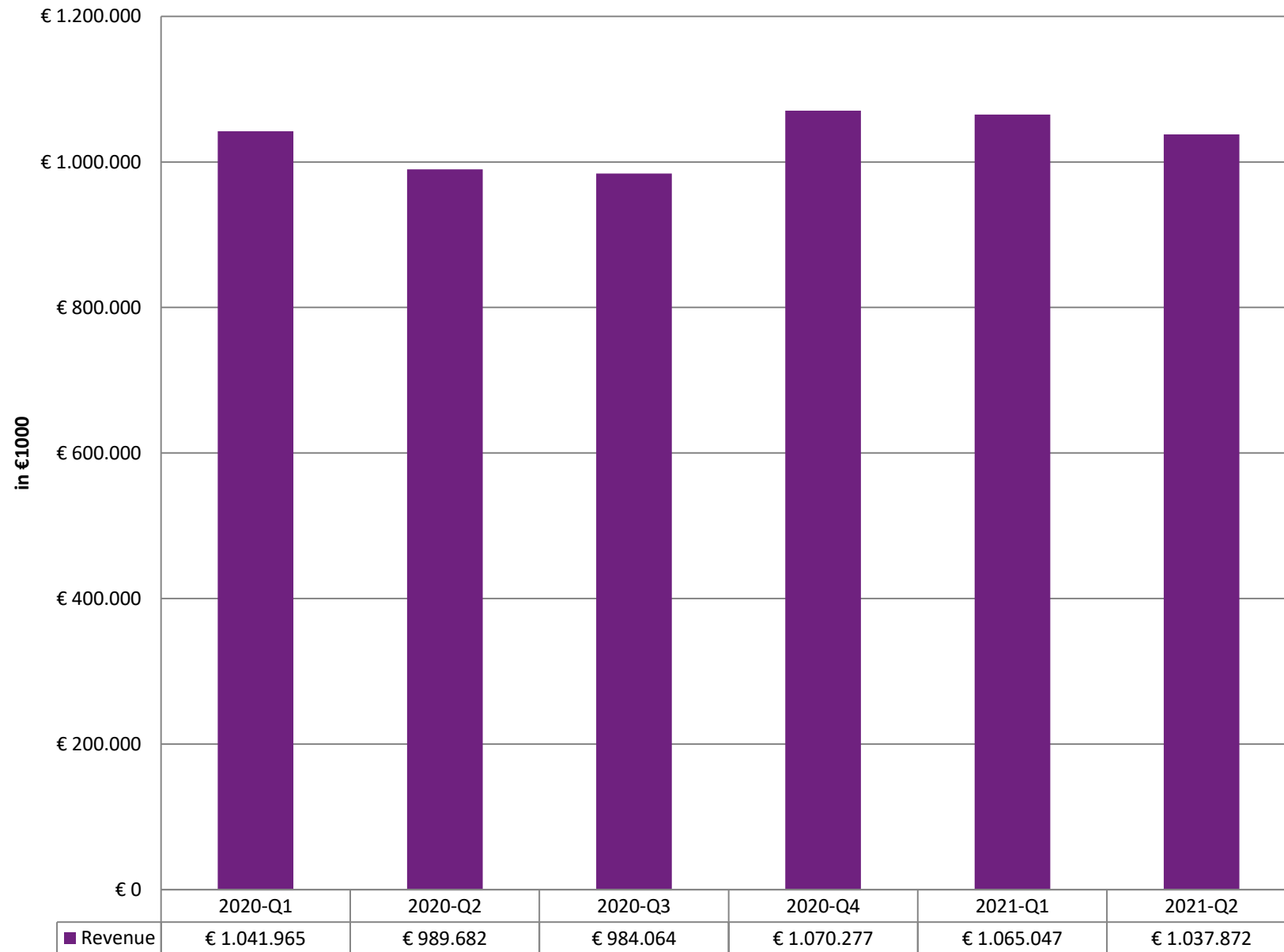
Retail market share based on connections



| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|---------------|------------|------------|------------|------------|------------|------------|
| 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 | [25 - 30%] | [25 - 30%] | [25 - 30%] | [25 - 30%] | [25 - 30%] | [25 - 30%] |
| MVNO's | [20 - 25%] | [20 - 25%] | [20 - 25%] | [15 - 20%] | [15 - 20%] | [15 - 20%] |

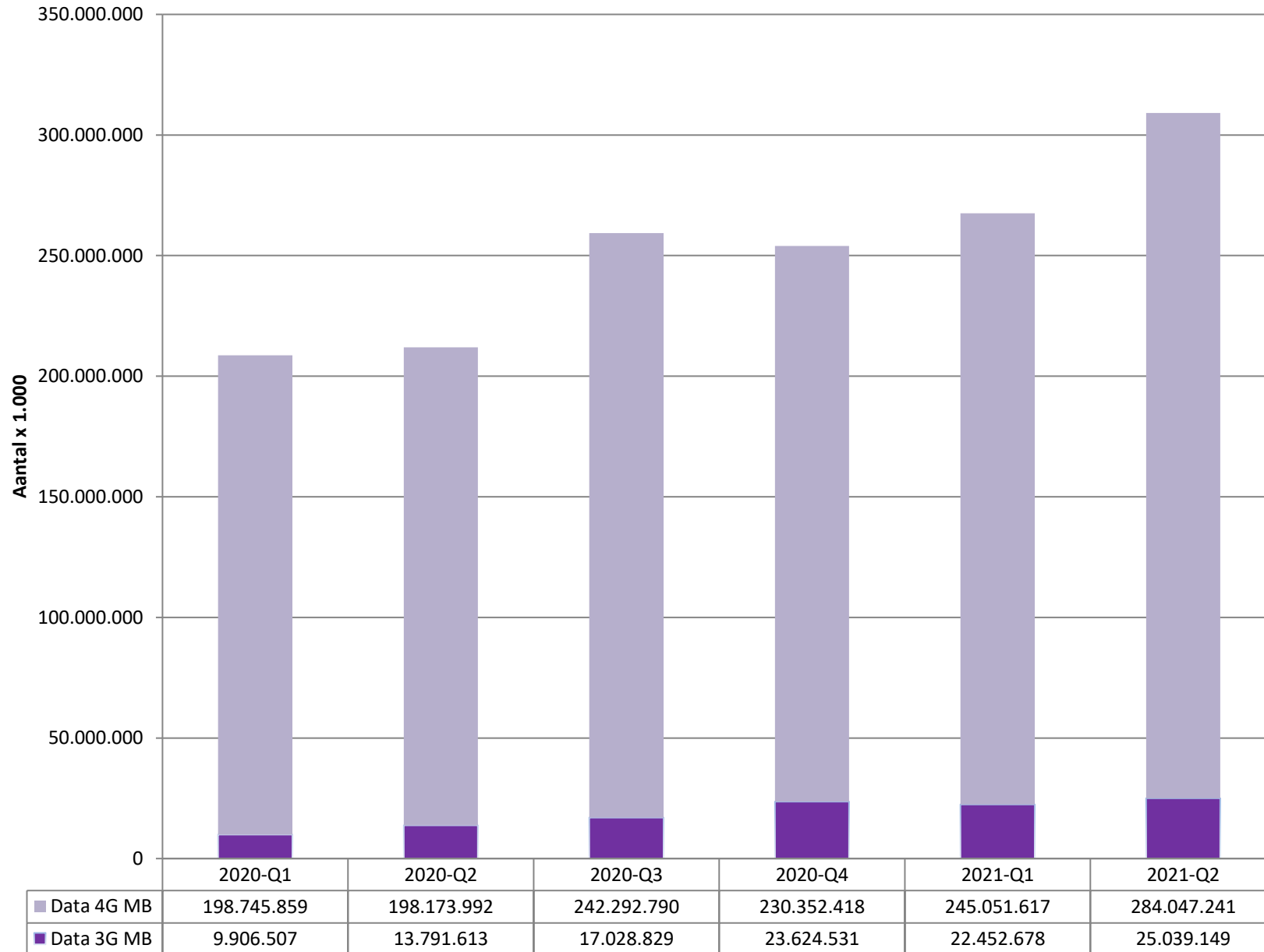
Mobile

Retail revenue of Mobile Network Operators (MNOs)



Mobile

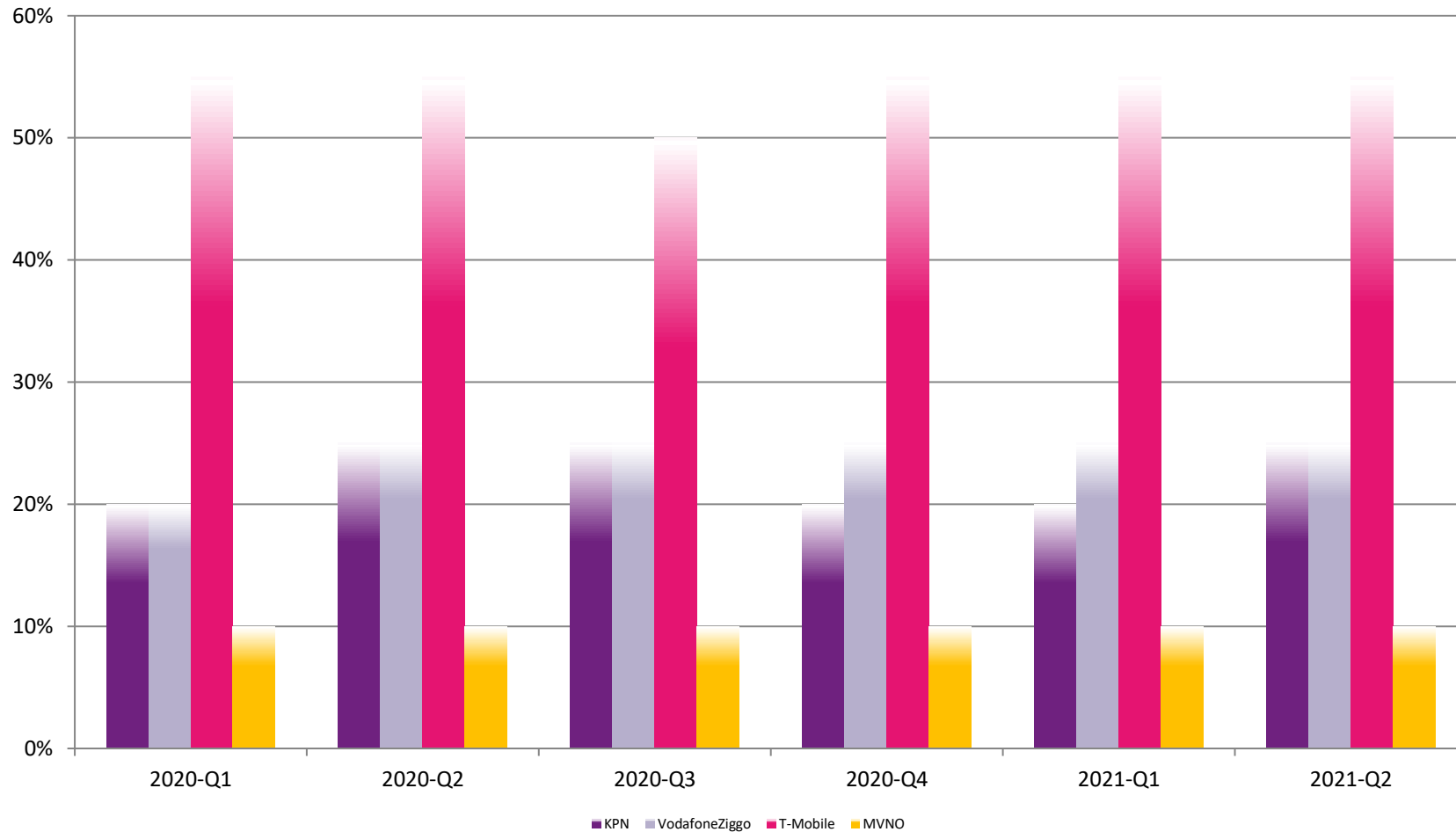
Retail volume 3G/4G data



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

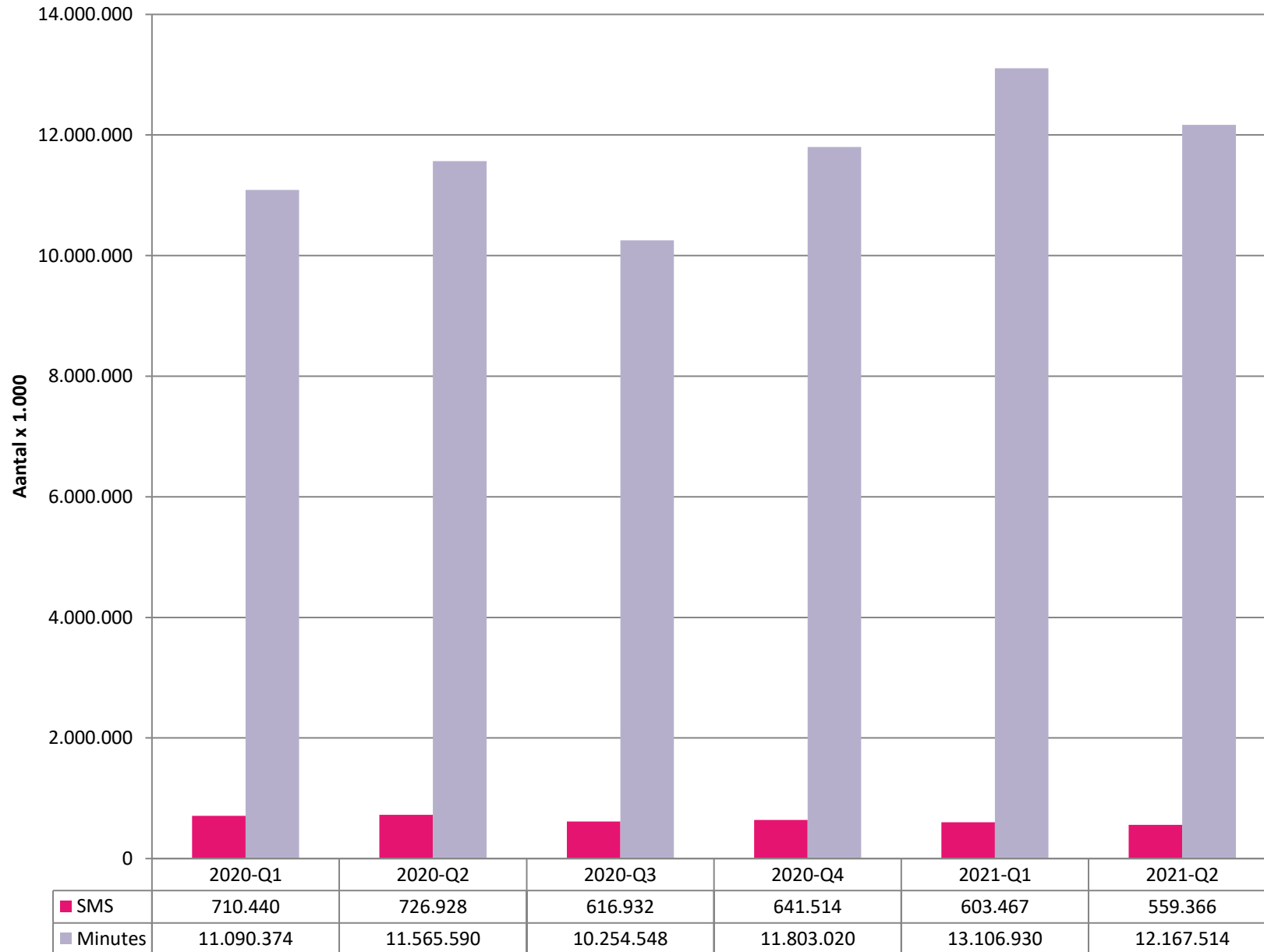
Retail market share based on data consumption



| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|---------------|------------|------------|------------|------------|------------|------------|
| KPN | [15 - 20%] | [20 - 25%] | [20 - 25%] | [15 - 20%] | [15 - 20%] | [20 - 25%] |
| VodafoneZiggo | [15 - 20%] | [20 - 25%] | [20 - 25%] | [20 - 25%] | [20 - 25%] | [20 - 25%] |
| T-Mobile | [50 - 55%] | [50 - 55%] | [45 - 50%] | [50 - 55%] | [50 - 55%] | [50 - 55%] |
| MVNO | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] |

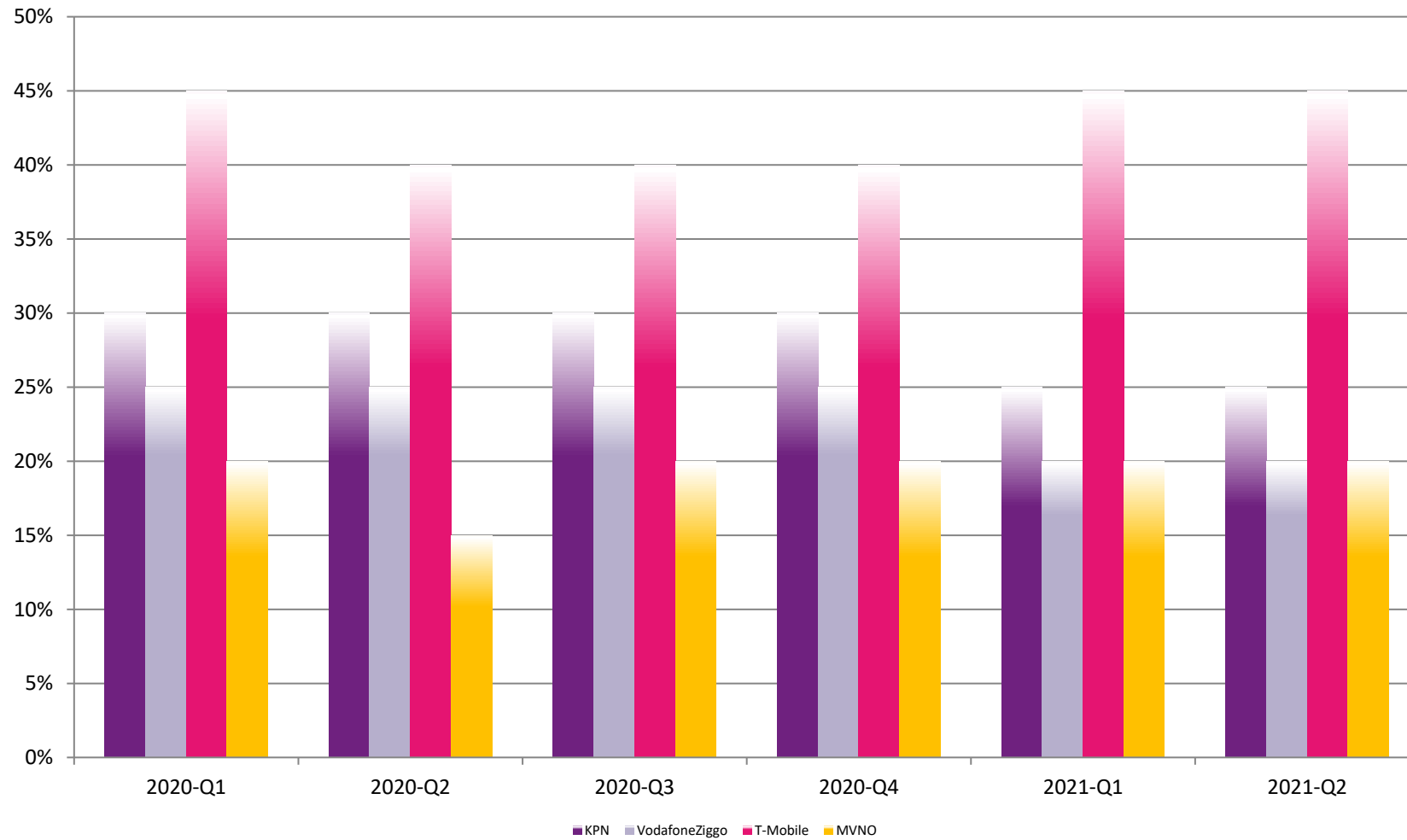
Mobile

Retail volume of voice minutes and SMS/text



Mobile

Retail market share based on consumed voice minutes



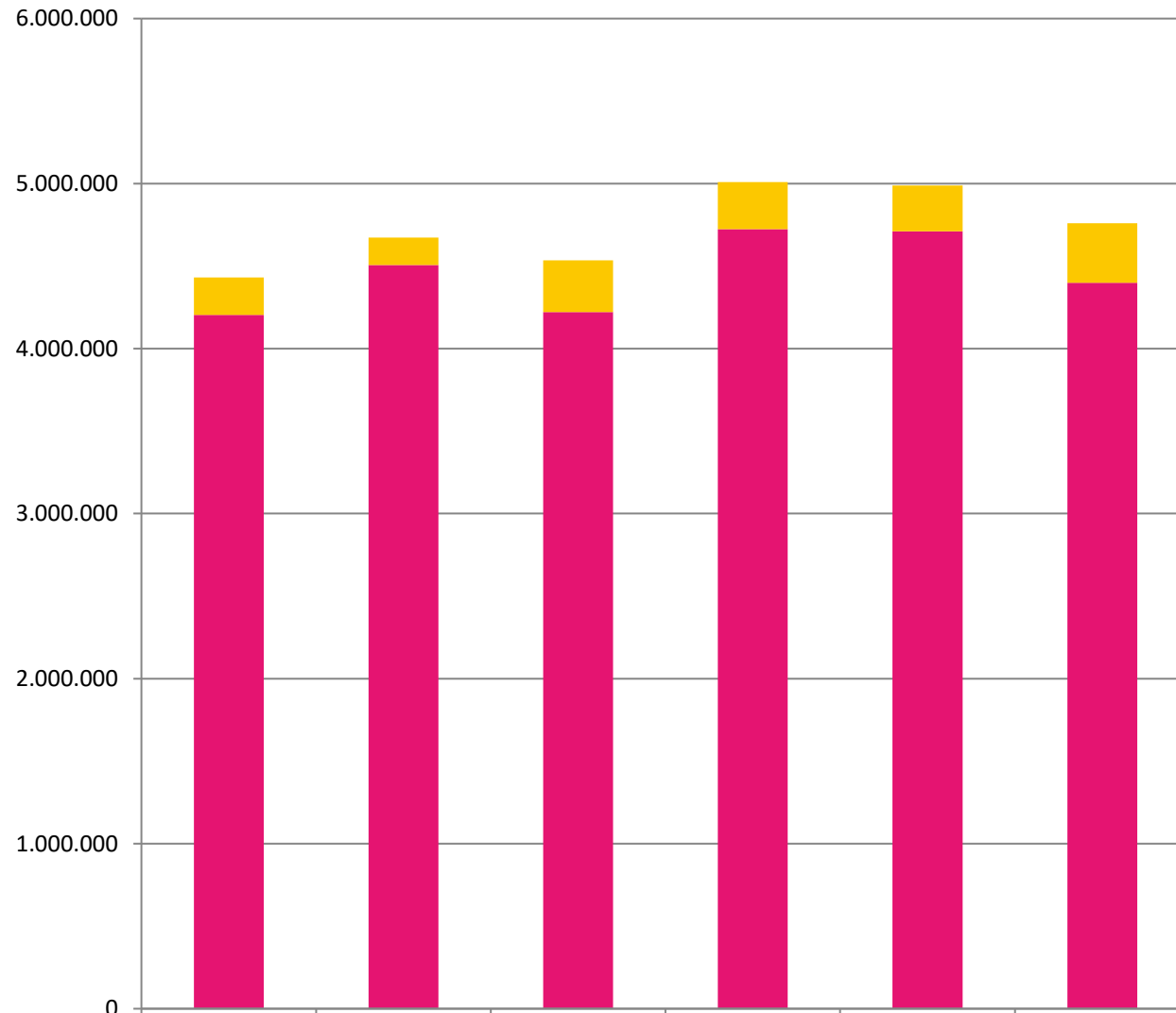
| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|---------------|------------|------------|------------|------------|------------|------------|
| KPN | [25 - 30%] | [25 - 30%] | [25 - 30%] | [25 - 30%] | [20 - 25%] | [20 - 25%] |
| VodafoneZiggo | [20 - 25%] | [20 - 25%] | [20 - 25%] | [20 - 25%] | [15 - 20%] | [15 - 20%] |
| T-Mobile | [40 - 45%] | [35 - 40%] | [35 - 40%] | [35 - 40%] | [40 - 45%] | [40 - 45%] |
| MVNO | [15 - 20%] | [10 - 15%] | [15 - 20%] | [15 - 20%] | [15 - 20%] | [15 - 20%] |

Mobile

Wholesale volume of call termination (excluding onnet)



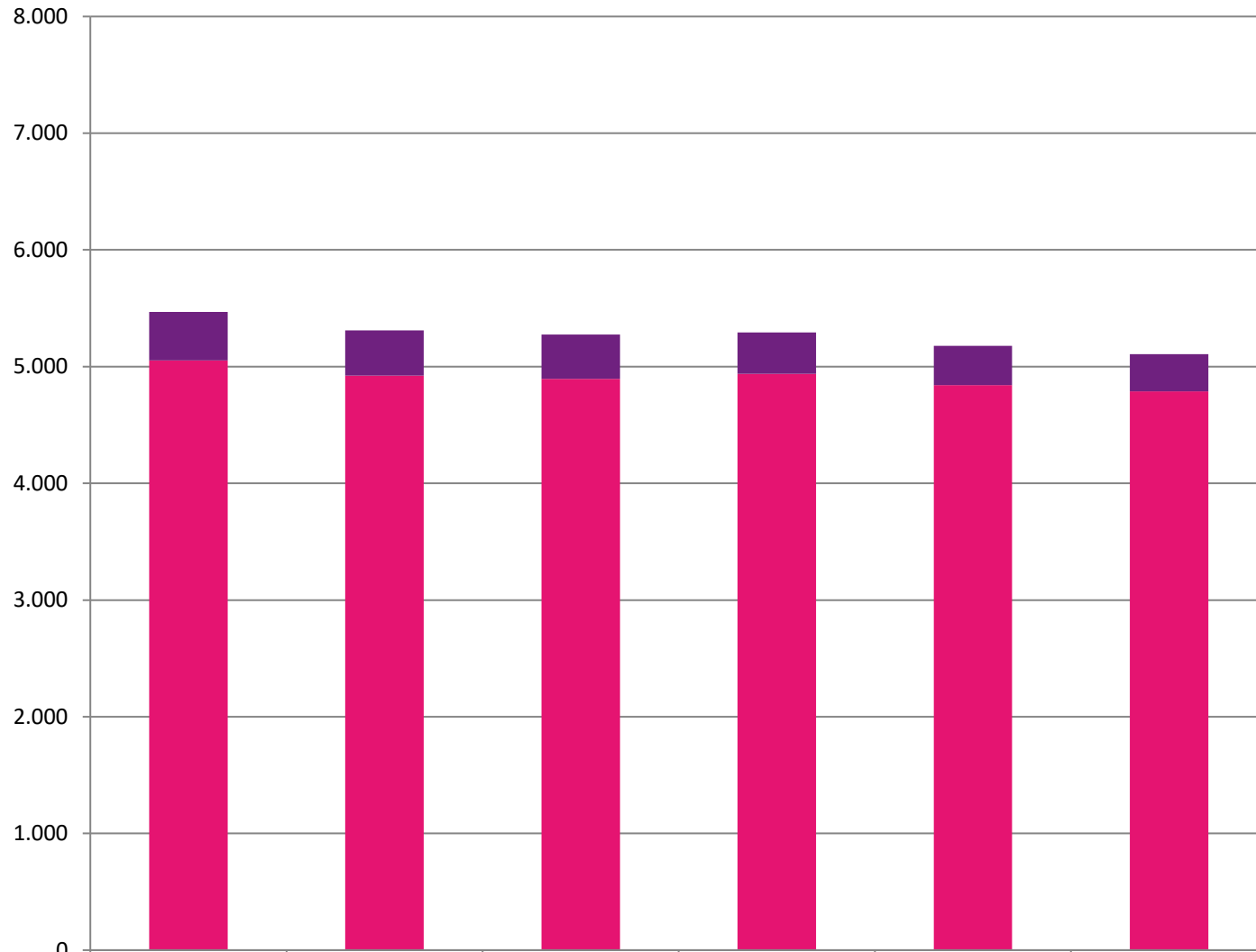
Minuten x 1.000



| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|--|-----------|-----------|-----------|-----------|-----------|-----------|
| Volume terminated from national networks | 227.201 | 165.322 | 314.514 | 285.849 | 277.763 | 359.541 |
| Volume terminated from abroad | 4.204.771 | 4.507.294 | 4.220.924 | 4.723.289 | 4.710.561 | 4.399.829 |

Fixed telephony

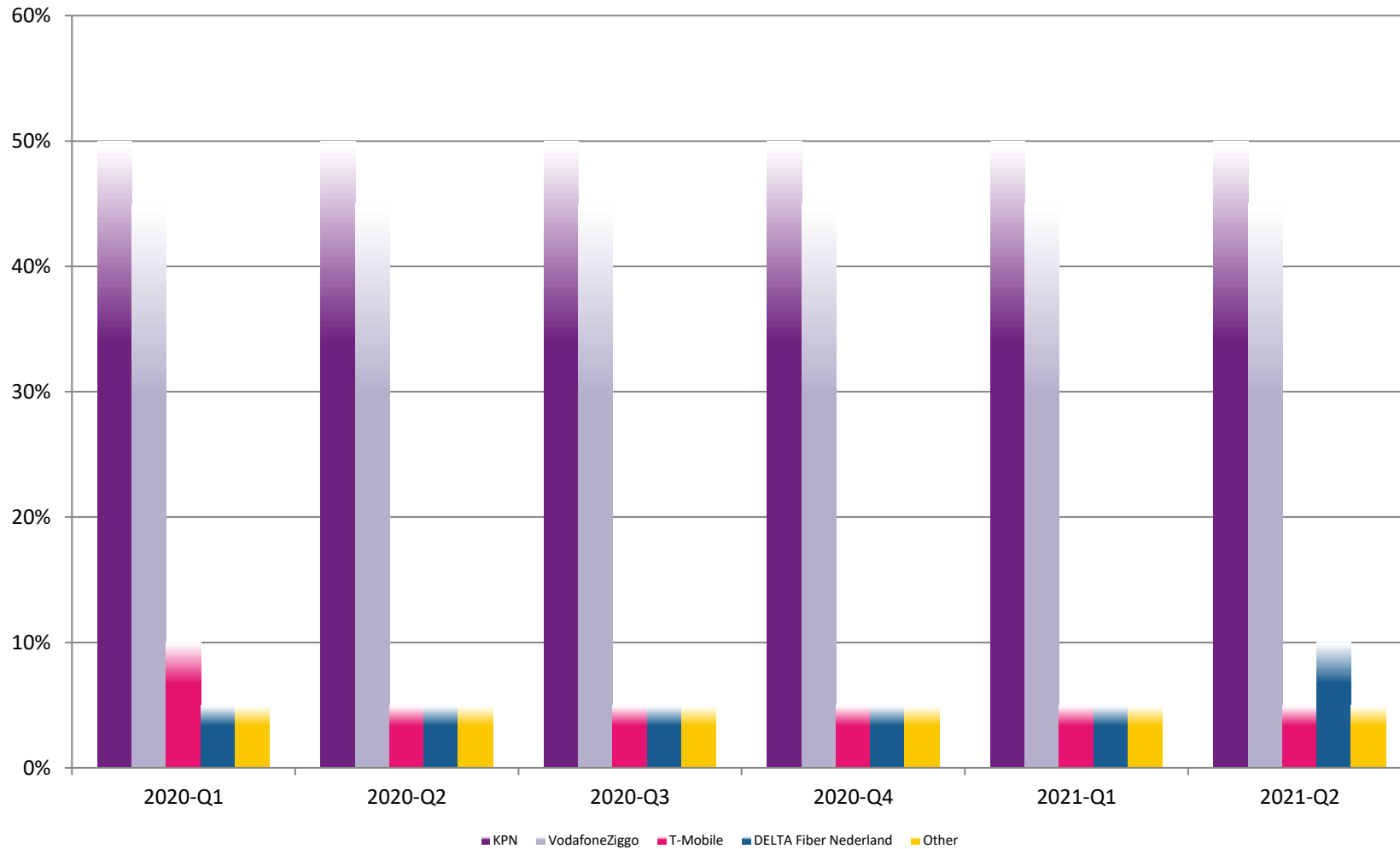
Retail single connections



| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|-------------------------|---------|---------|---------|---------|---------|---------|
| ■ PSTN | 417 | 388 | 378 | 357 | 336 | 318 |
| ■ VoB Single connection | 5.052 | 4.924 | 4.896 | 4.937 | 4.841 | 4.788 |
| Adds | 1,4% | 1,5% | 2,7% | 3,9% | 2,0% | 1,3% |
| Disconnects | 2,7% | 2,7% | 3,5% | 3,4% | 2,8% | 2,6% |

Fixed telephony

Retail market share based on single connections



| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|-----------------------|------------|------------|------------|------------|------------|------------|
| 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%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] |
| DELTA Fiber Nederland | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [0 - 5%] | [5 - 10%] |
| 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

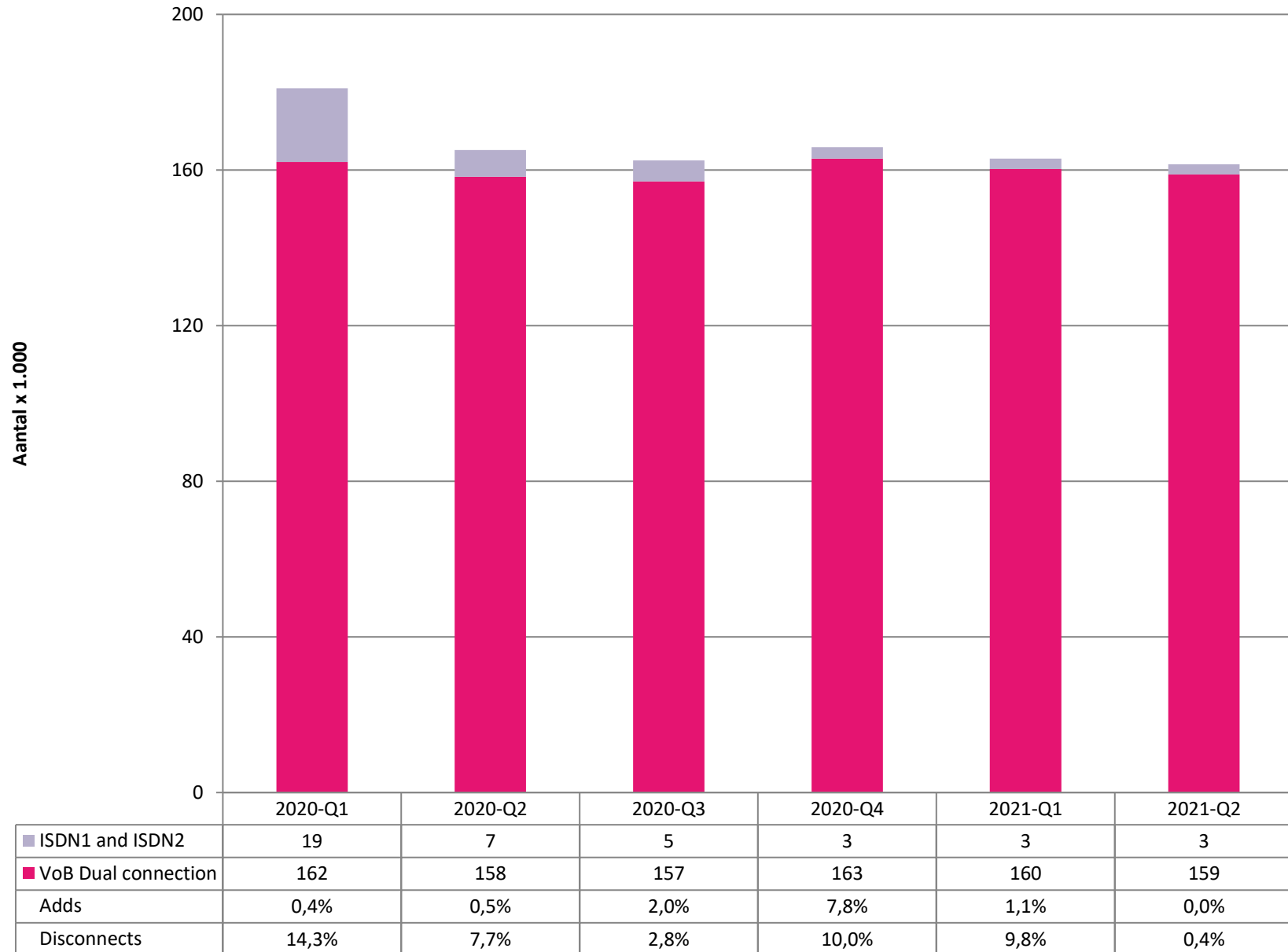
Fixed telephony

Retail turnover PSTN and VoB



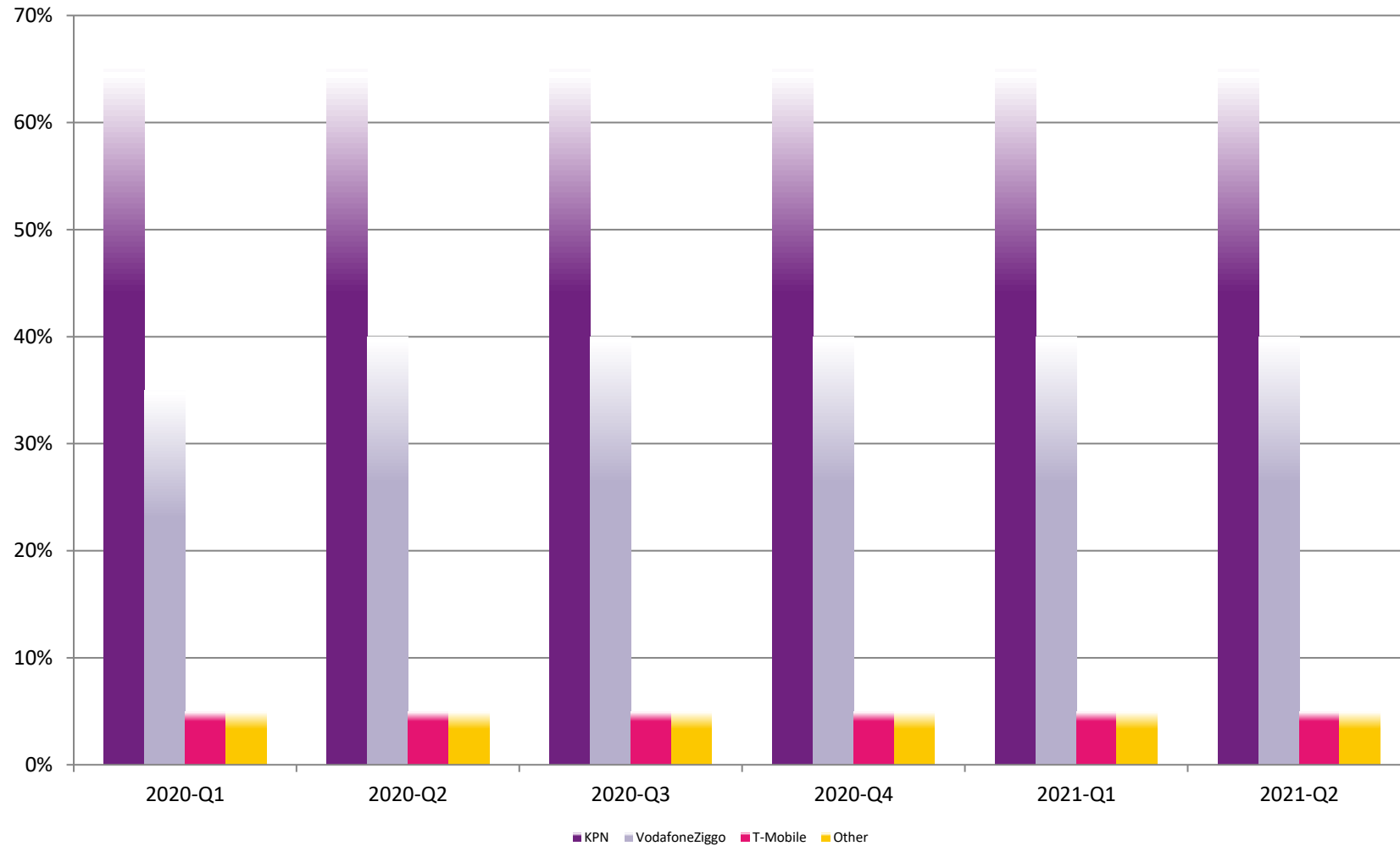
Fixed telephony

Retail dual connections



Fixed telephony

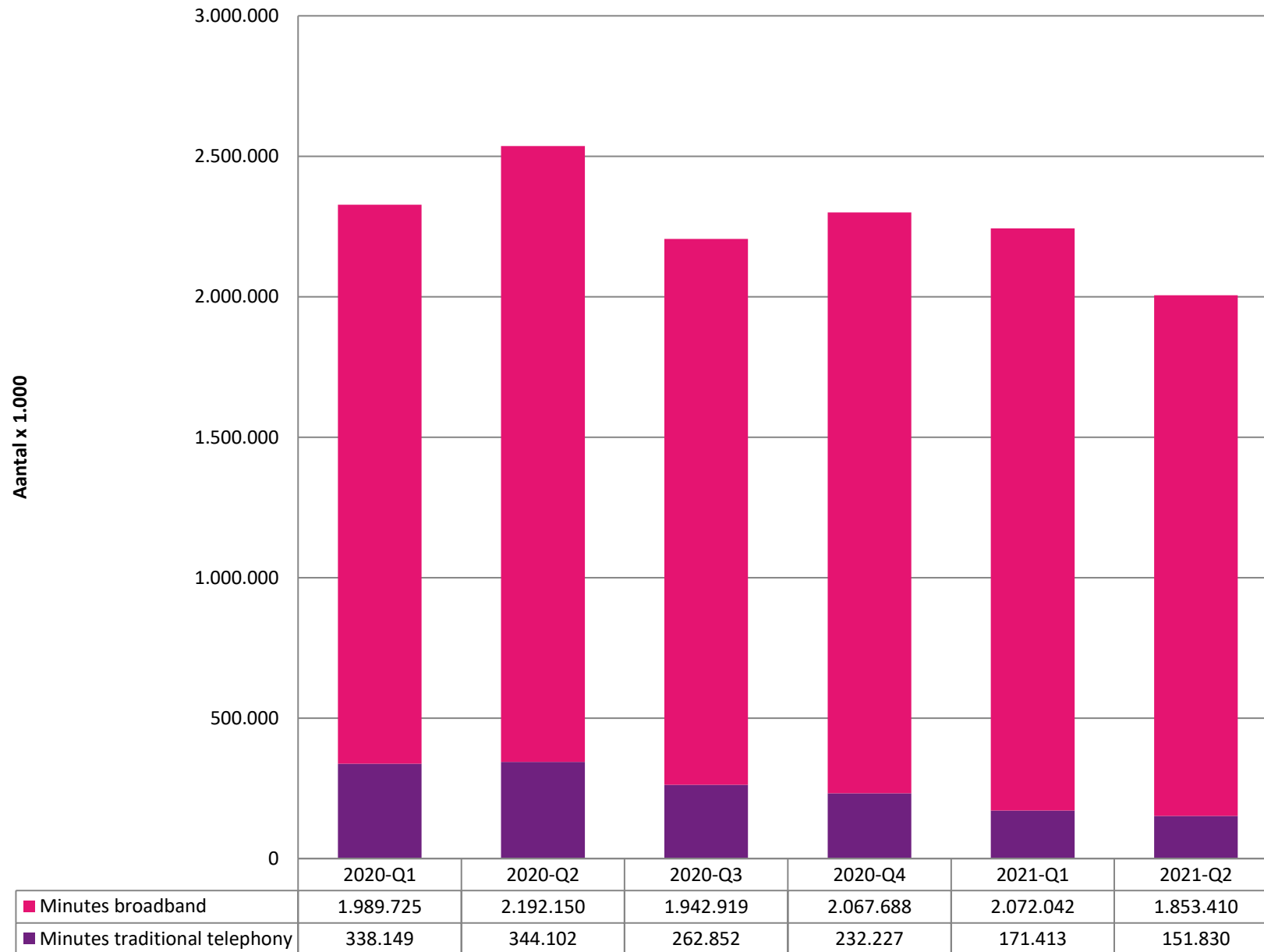
Retail market share based on dual connections



| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|---------------|------------|------------|------------|------------|------------|------------|
| KPN | [60 - 65%] | [60 - 65%] | [60 - 65%] | [60 - 65%] | [60 - 65%] | [60 - 65%] |
| VodafoneZiggo | [30 - 35%] | [35 - 40%] | [35 - 40%] | [35 - 40%] | [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%] |

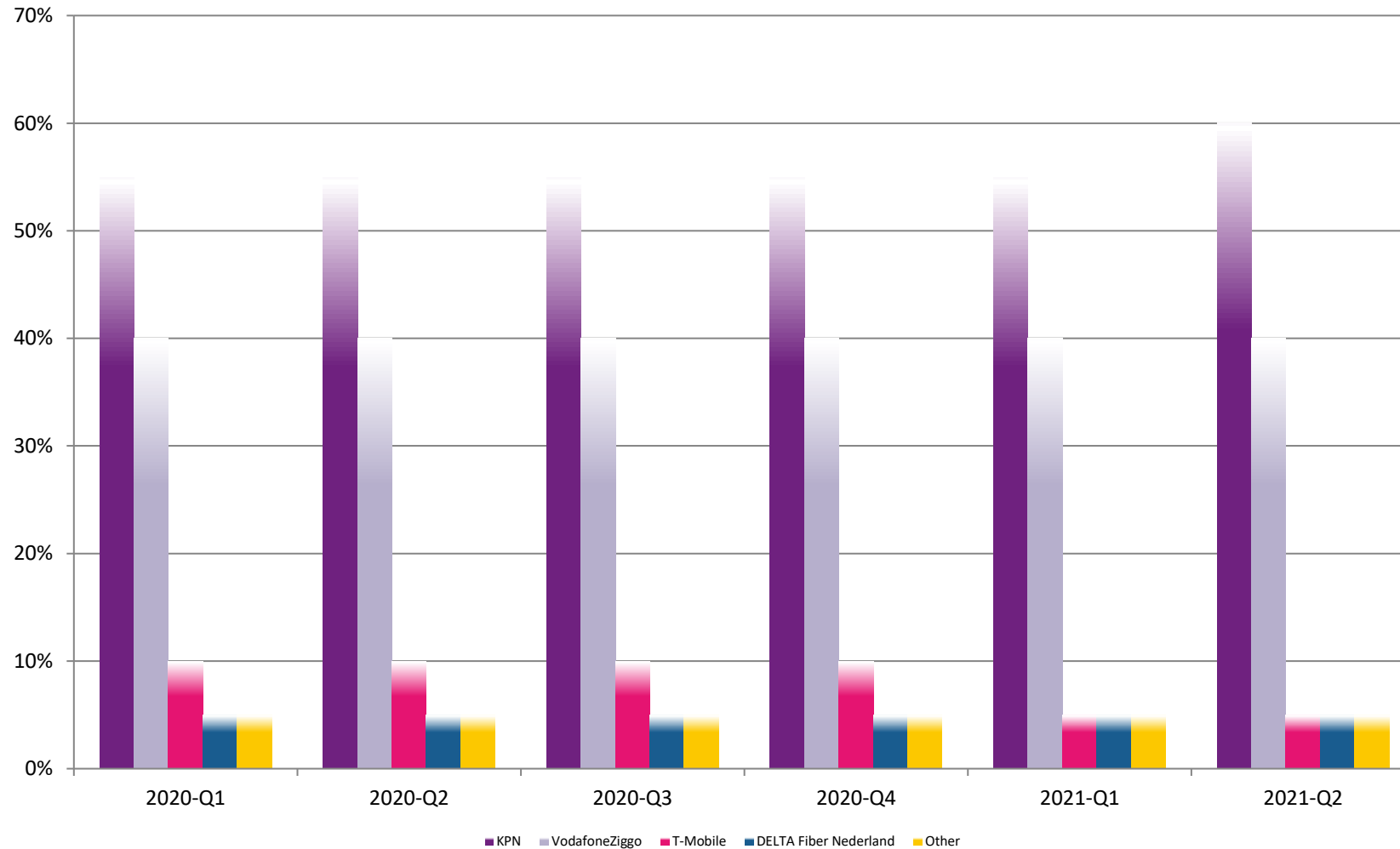
Fixed telephony

Retail volume based on voice minutes



Fixed telephony

Retail market share based on voice minutes



| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|-----------------------|------------|------------|------------|------------|------------|------------|
| KPN | [50 - 55%] | [50 - 55%] | [50 - 55%] | [50 - 55%] | [50 - 55%] | [55 - 60%] |
| VodafoneZiggo | [35 - 40%] | [35 - 40%] | [35 - 40%] | [35 - 40%] | [35 - 40%] | [35 - 40%] |
| 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%] |

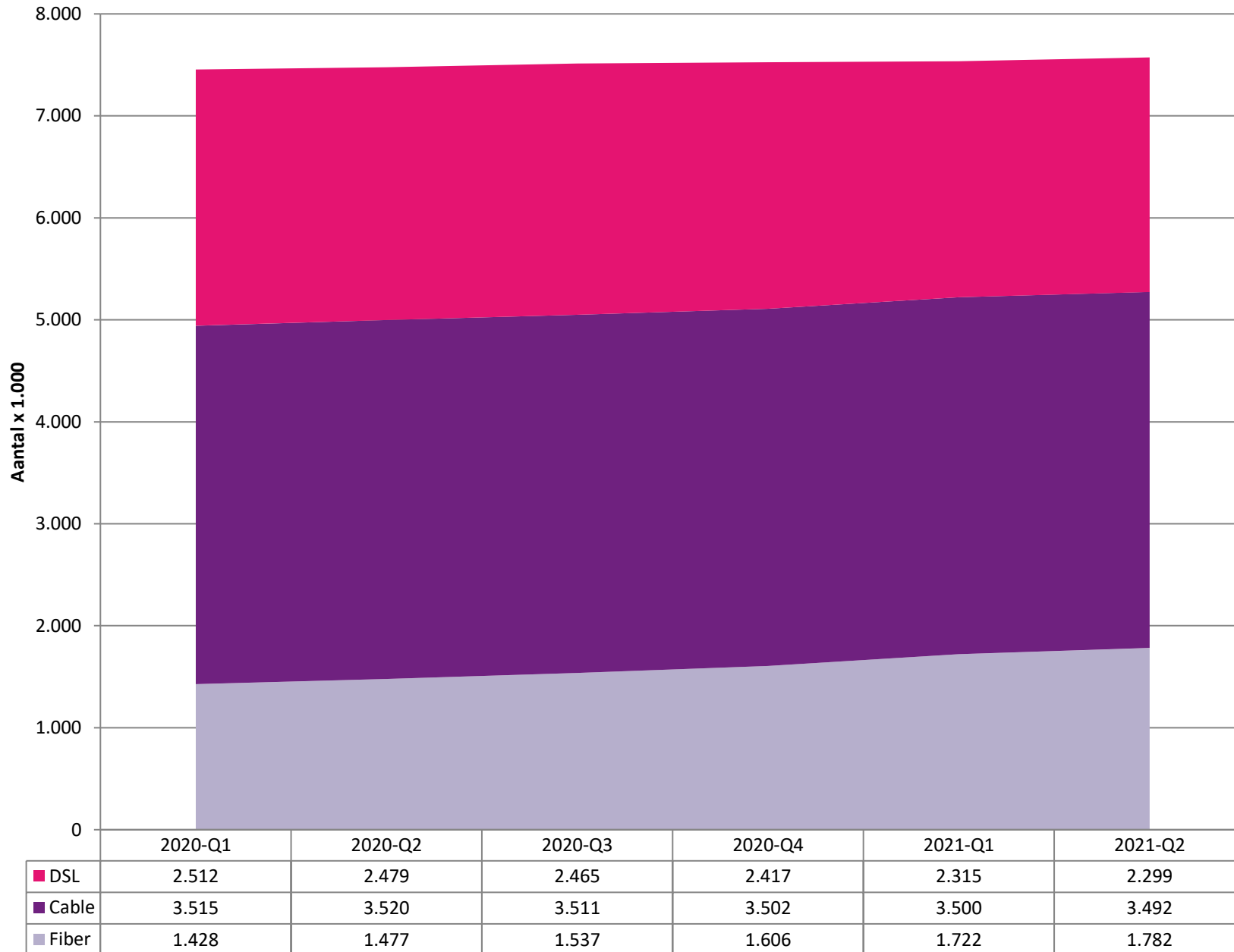
Fixed telephony

Retail turnover per type of traffic



Broadband

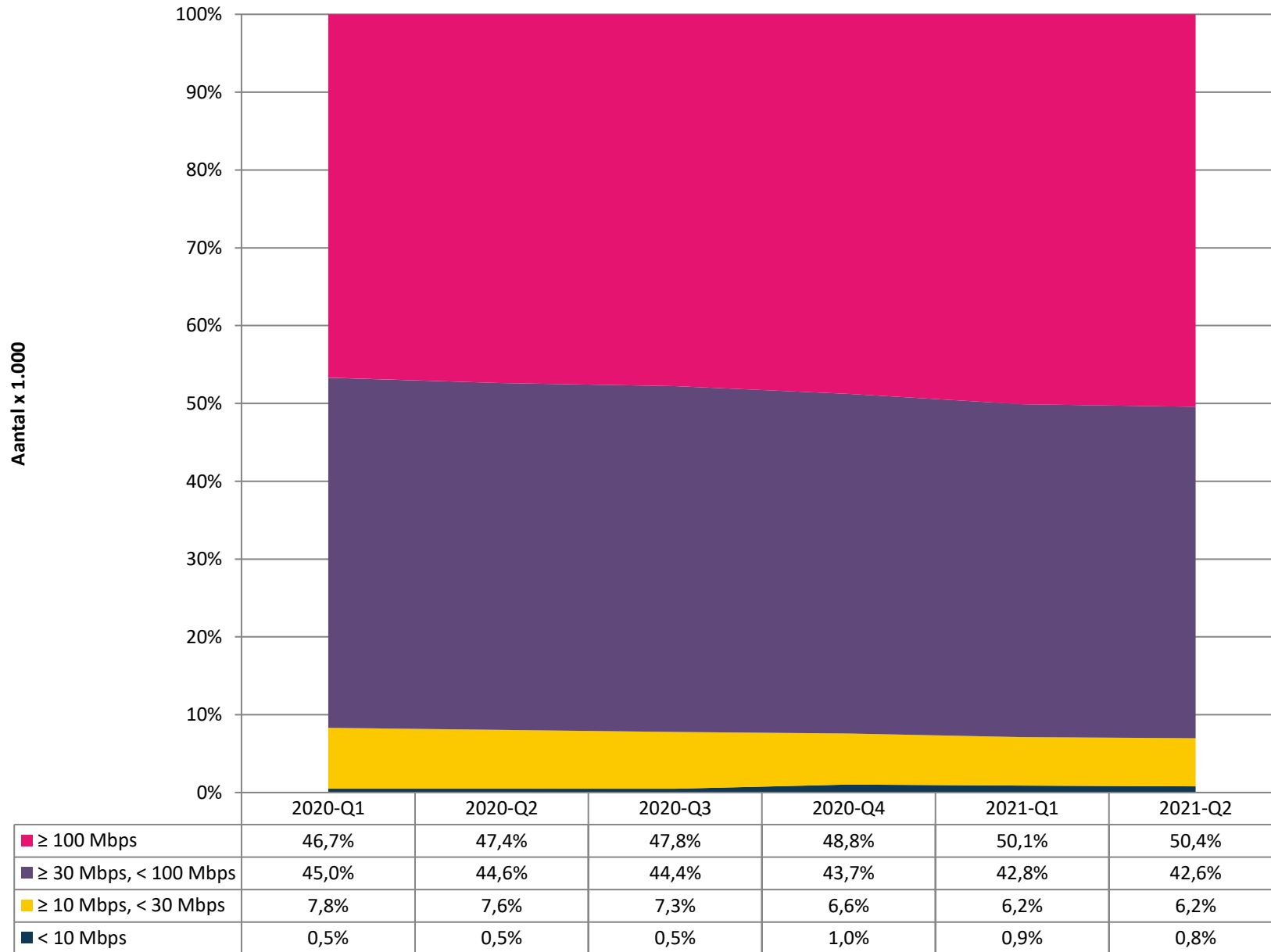
Retail connections per type



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

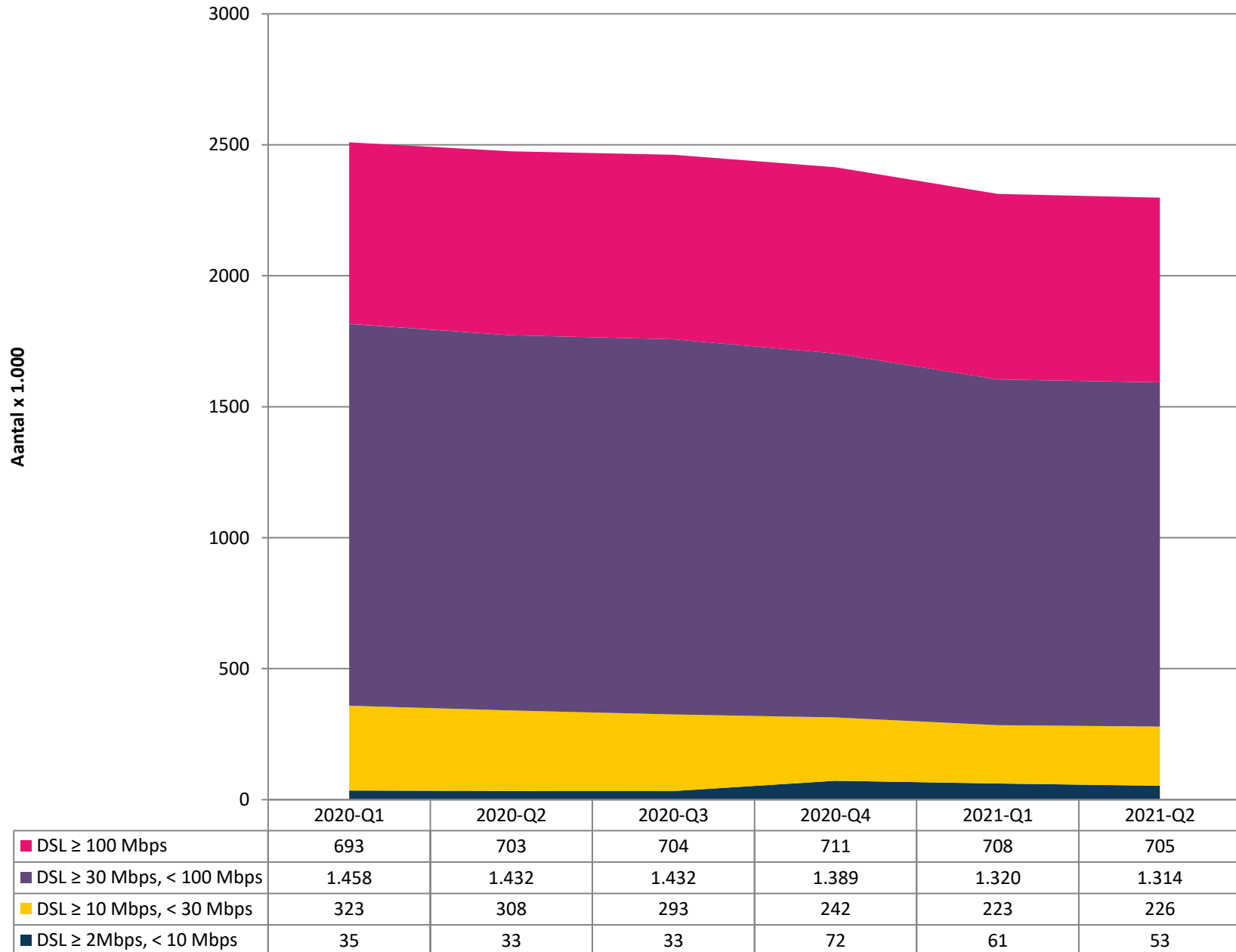
Percentage retail connections by speed



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

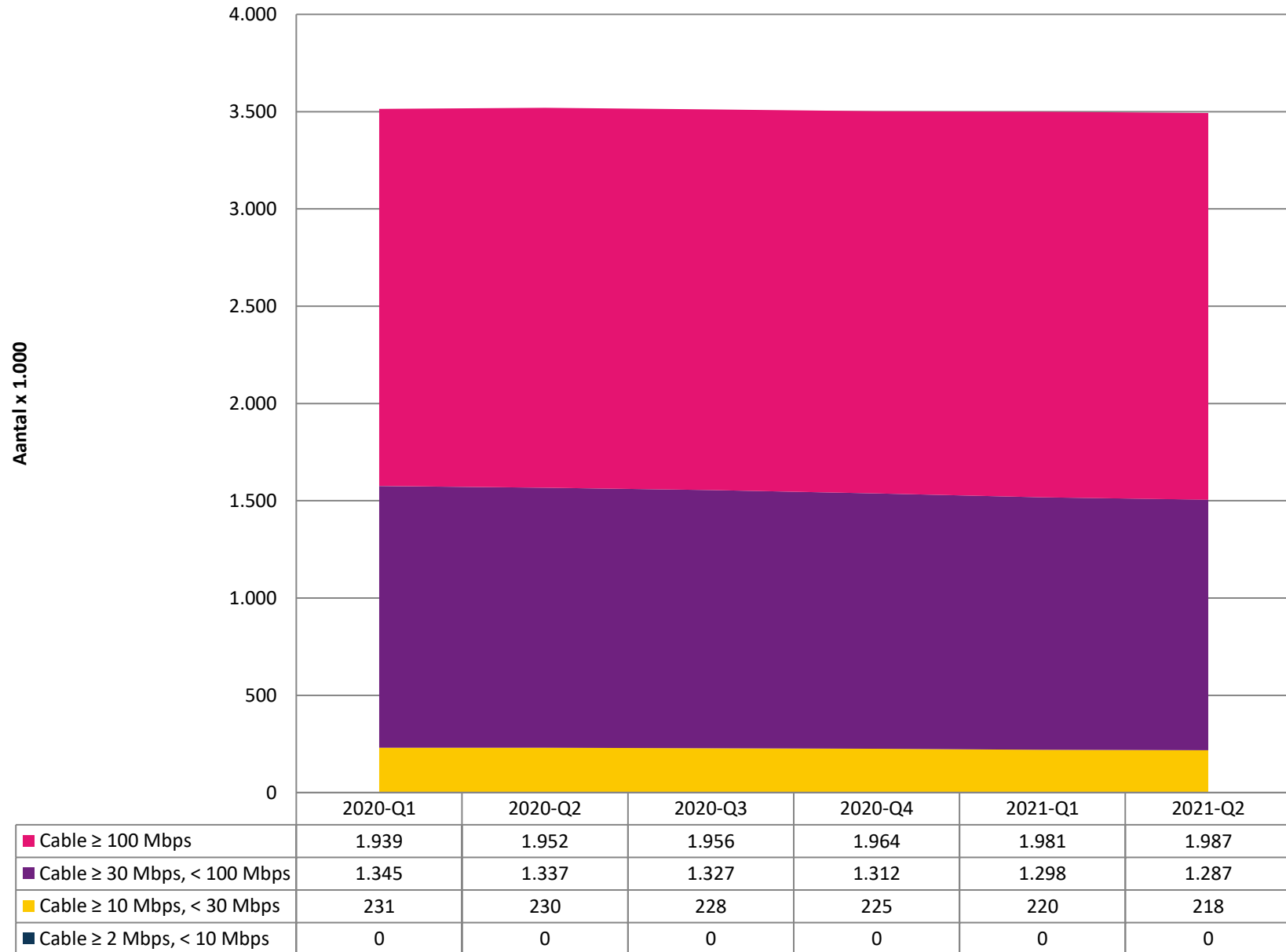
Retail DSL-connections by speed



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

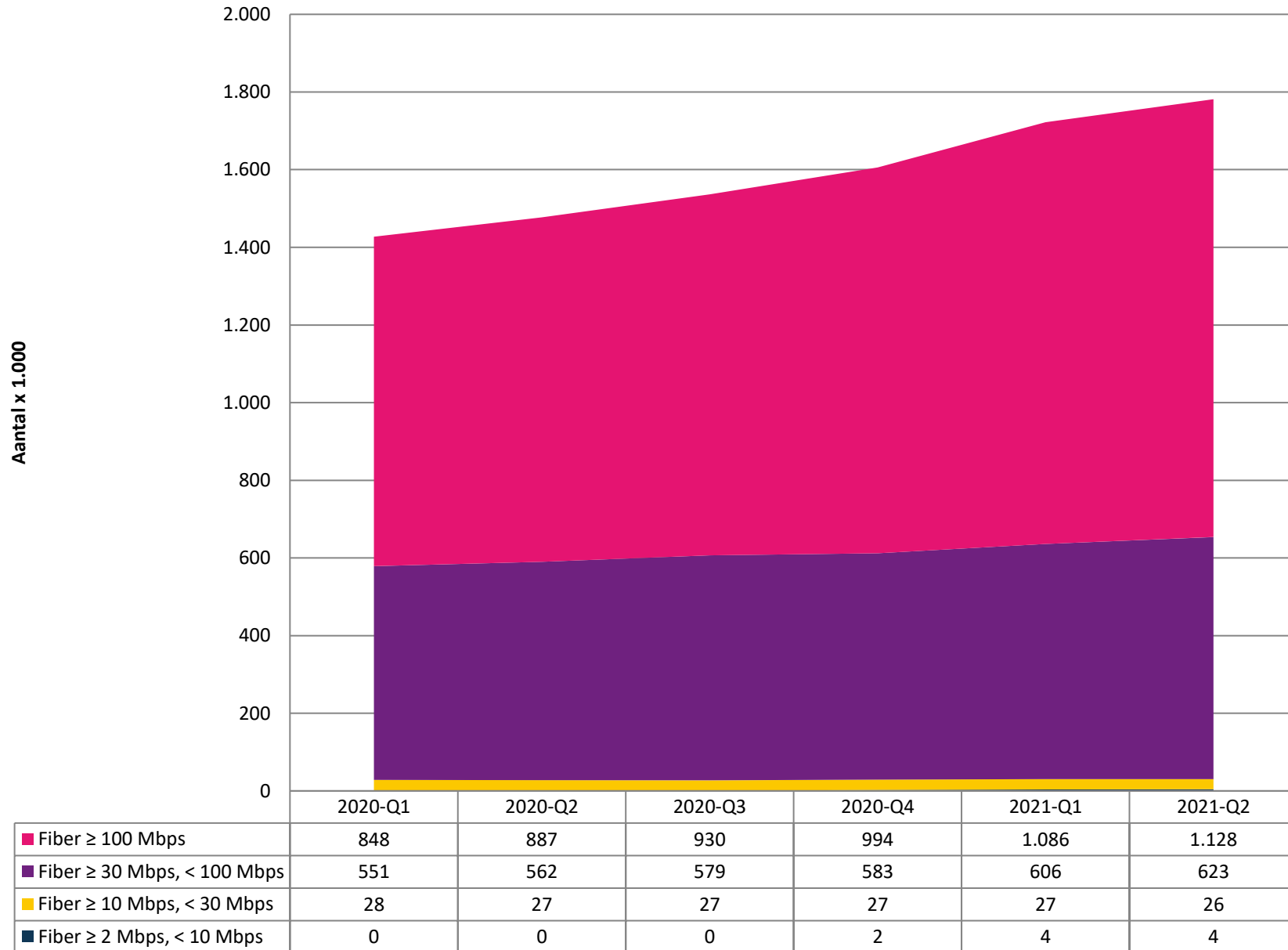
Retail cable connections by speed



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

Broadband

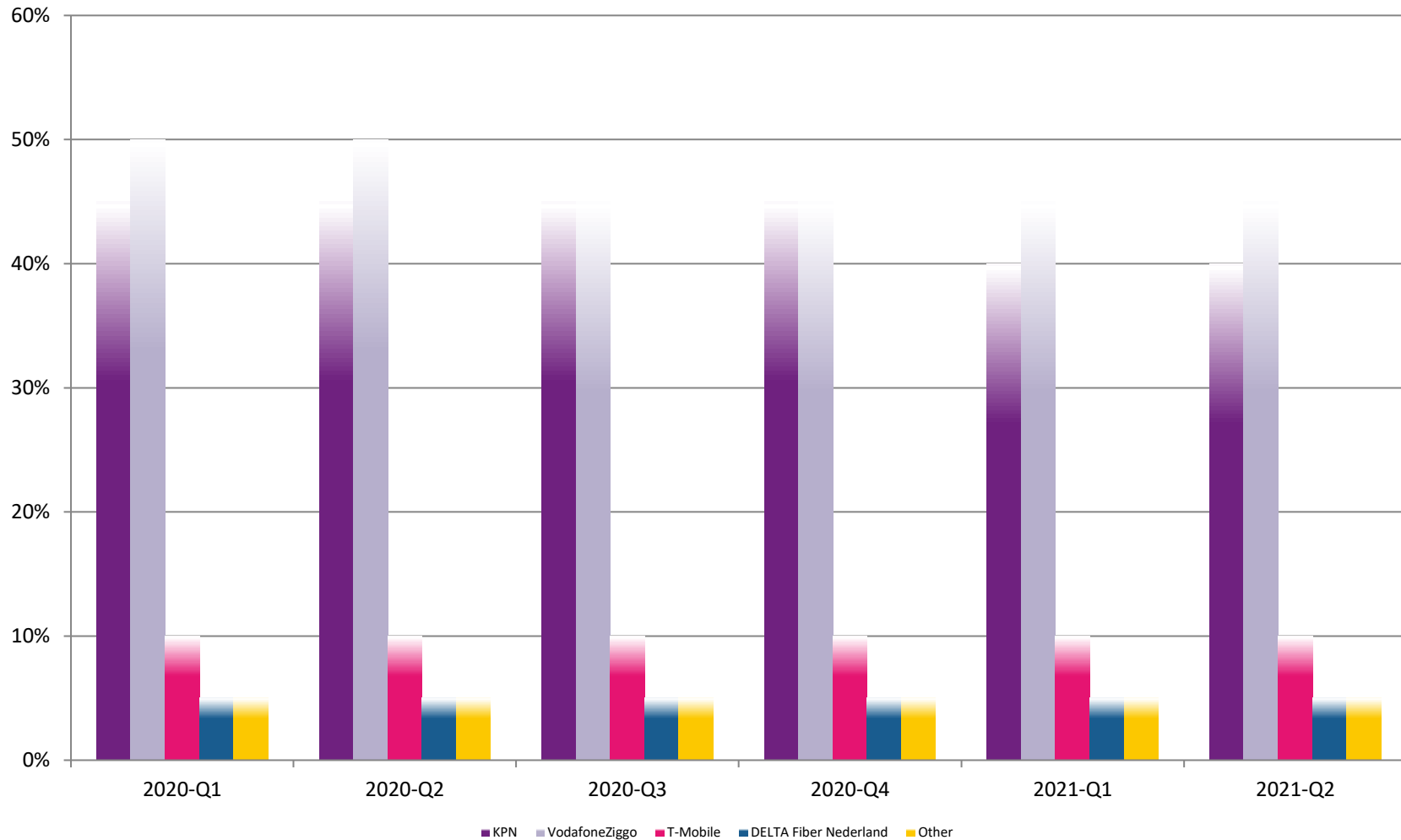
Retail fiber-optic connections by speed



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

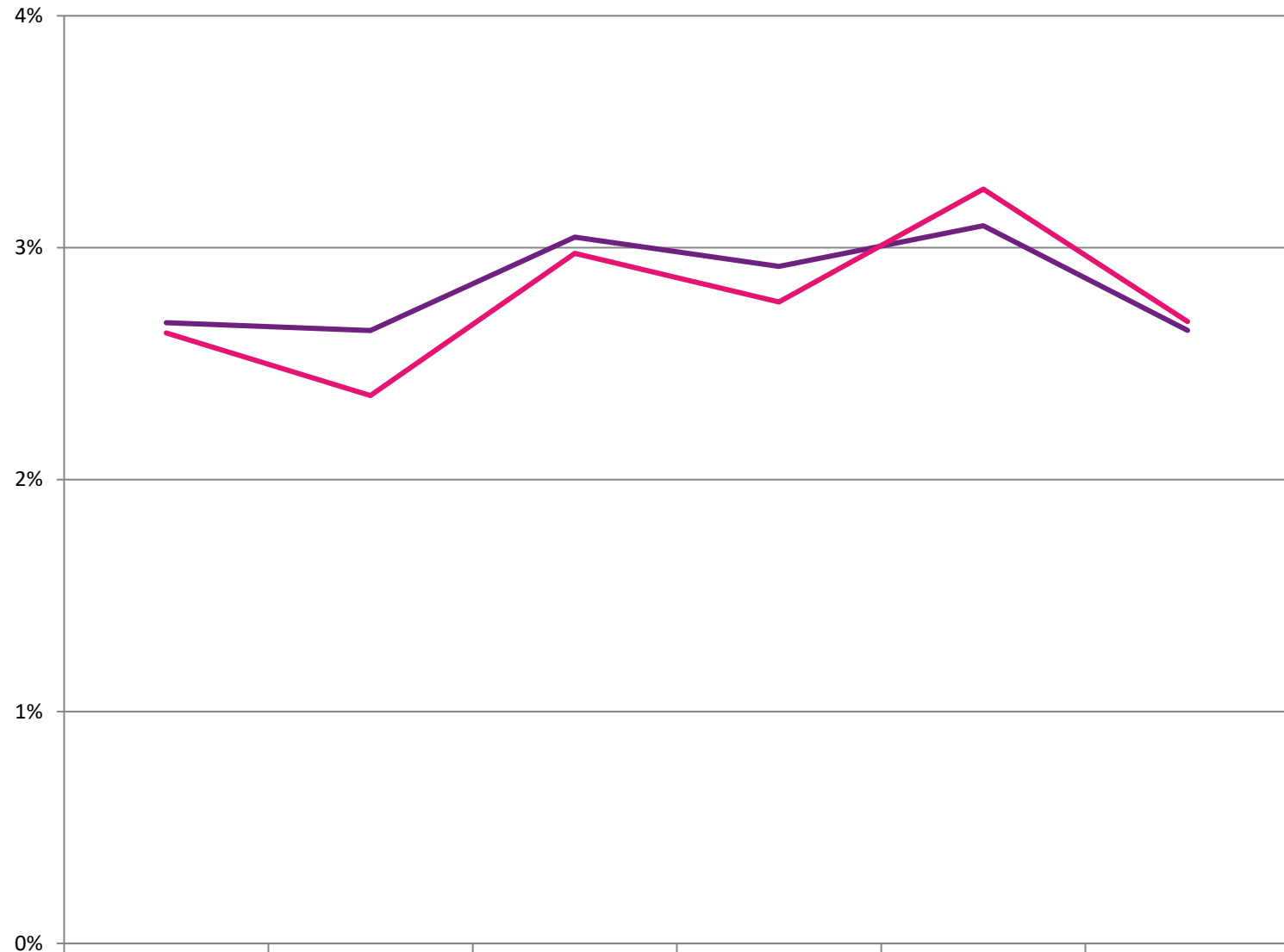


| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|-----------------------|------------|------------|------------|------------|------------|------------|
| KPN | [40 - 45%] | [40 - 45%] | [40 - 45%] | [40 - 45%] | [35 - 40%] | [35 - 40%] |
| VodafoneZiggo | [45 - 50%] | [45 - 50%] | [40 - 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 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

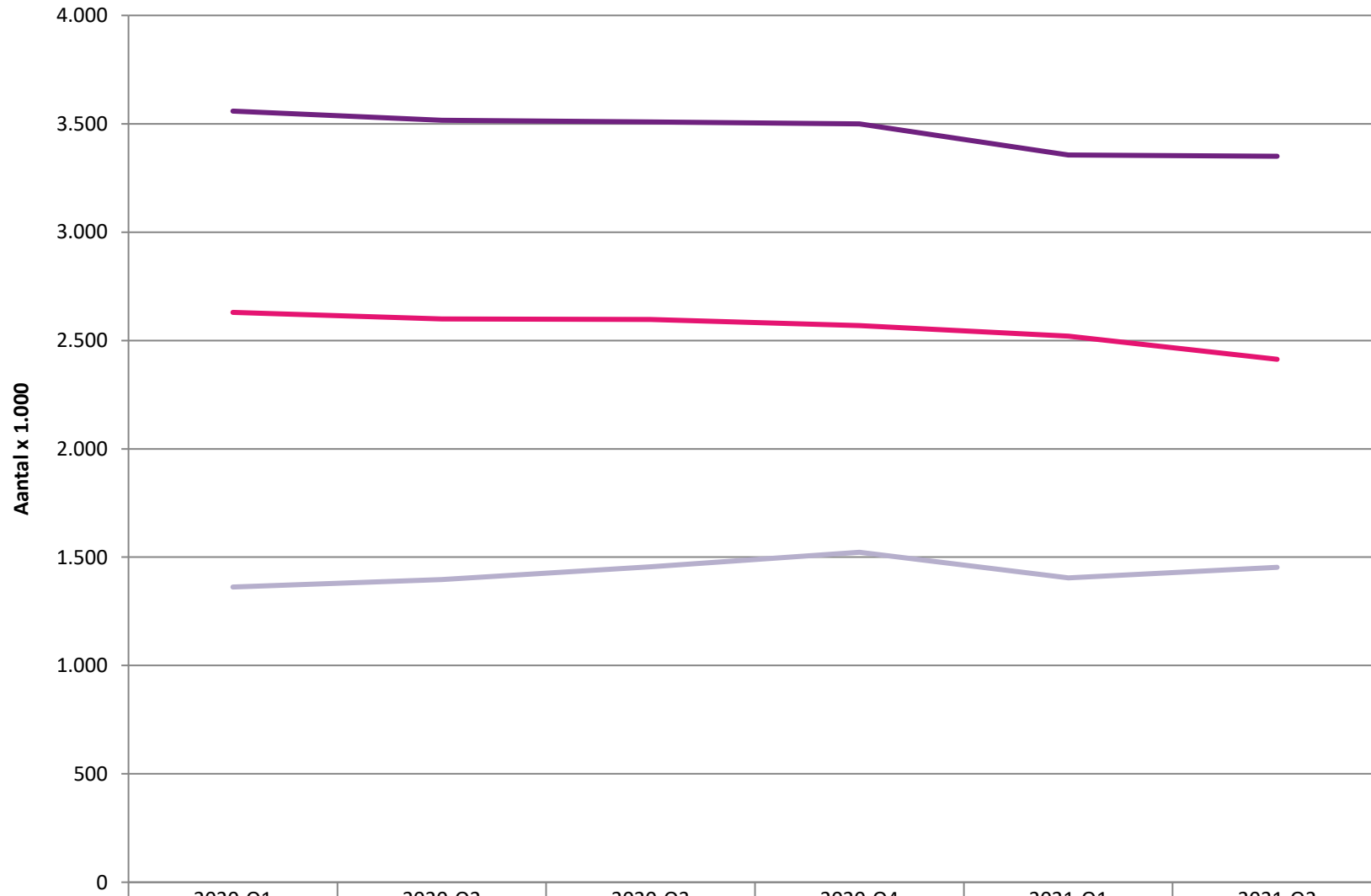
Broadband

Retail churn based on connections



Broadband

Low-quality WBT-connections



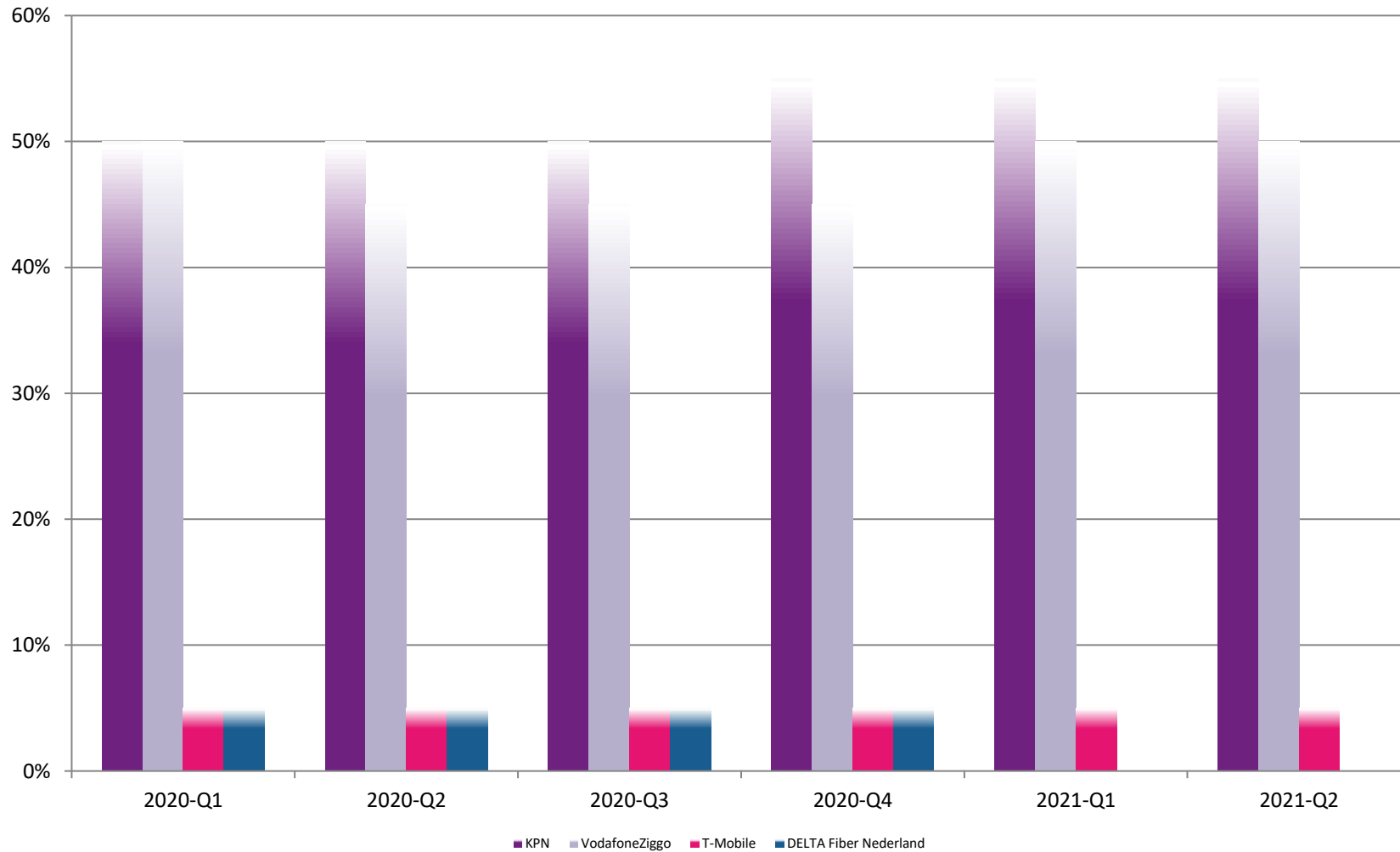
1) De afname van WBT obv glasvezel en kabel voor de periode Q1 2021 is veroorzaakt door de integratie van CIF en Rekam in Delta Fiber Nederland.

2) KPN heeft voor Q2 2021 en eerder correcties doorgevoerd ten aanzien van lage kwaliteit WBT obv DSL en glasvezel.

Op basis van vragen 30_B3_1_b-c-d-e en 30_B3_2_1-2-3-4 van de Telecommonitor

Broadband

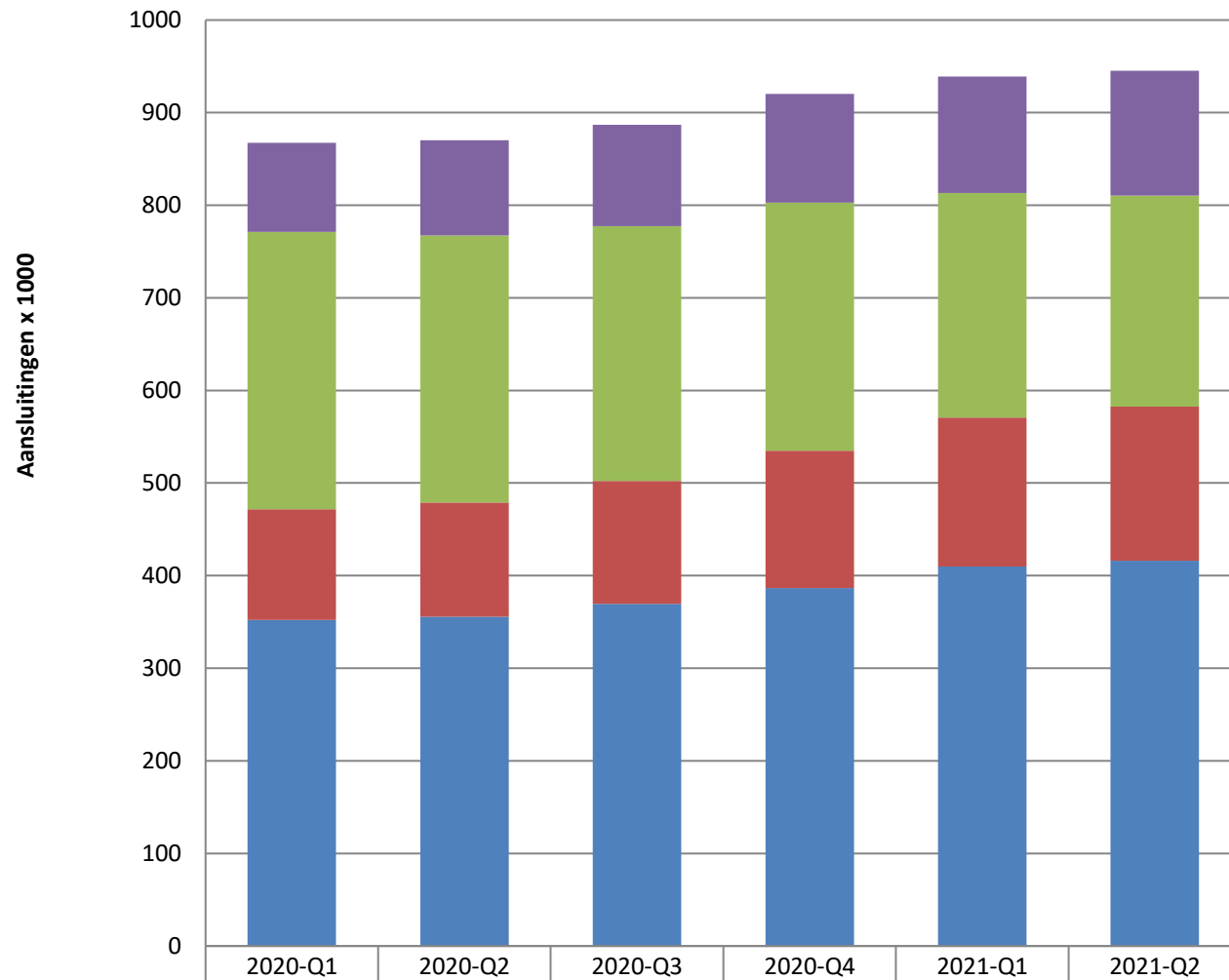
Market share based on low-quality WBT-connections



| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|-----------------------|------------|------------|------------|------------|------------|------------|
| KPN | [45 - 50%] | [45 - 50%] | [45 - 50%] | [50 - 55%] | [50 - 55%] | [50 - 55%] |
| VodafoneZiggo | [45 - 50%] | [40 - 45%] | [40 - 45%] | [40 - 45%] | [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 - 0%] | [0 - 0%] |

Broadband

Unbundled access and external procurement of copper and fiber-optic (FttH) by alternative providers with KPN

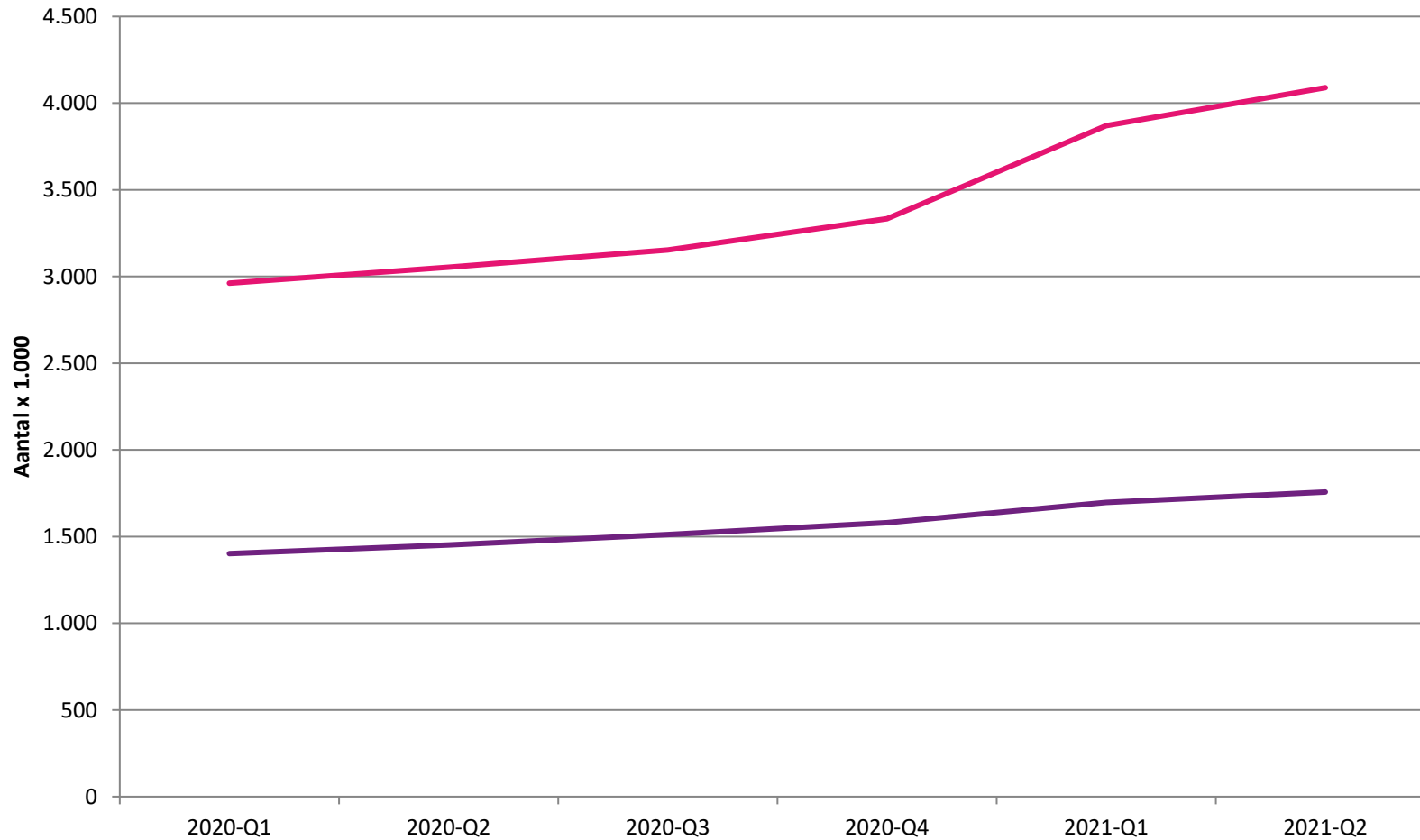


| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|---|---------|---------|---------|---------|---------|---------|
| ■ Unbundled Local Loop Fiber (FttH) | 96 | 103 | 109 | 117 | 126 | 135 |
| ■ (Virtual) Unbundles Local Loop Copper | 299 | 288 | 275 | 268 | 242 | 228 |
| ■ Purchase of active fiber optic connections (FttH) | 119 | 123 | 133 | 148 | 161 | 166 |
| ■ Purchase of active copper connections | 352 | 356 | 370 | 387 | 410 | 416 |

* KPN heeft voor de periode Q2 2021 en eerder correcties doorgevoerd ten aanzien van lage kwaliteit WBT obv DSL en glasvezel.

Broadband

Homes passed and activated (FttH)



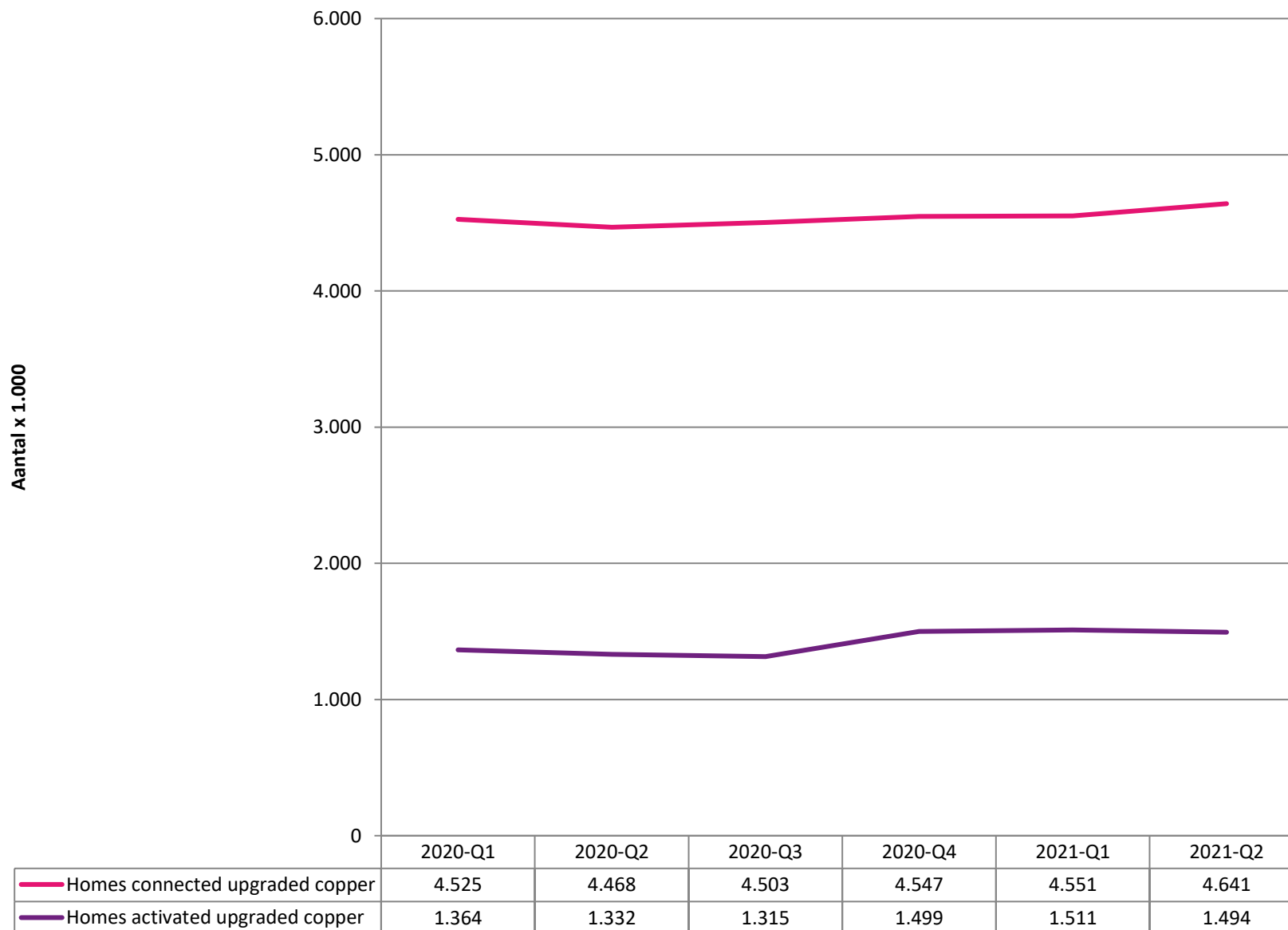
| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|--|---------|---------|---------|---------|---------|---------|
| — Homes passed fiber (FttH) | 2.962 | 3.054 | 3.154 | 3.333 | 3.871* | 4.090* |
| — Homes activated fiber (FttH) | 1.402 | 1.452 | 1.512 | 1.581 | 1.698* | 1.757* |

De ACM heeft in het kader van de Telecommontitor haar reguliere uitvraag uitgebreid met 10-15 kleine en regionale glasvezelaanbieders. Zie pagina 60 van deze rapportage voor een lijst met de bevroagde marktpartijen.

* Inclusief aansluitingen van kleine/regionale glasvezelaanbieders.

Broadband

Homes connected to upgraded copper

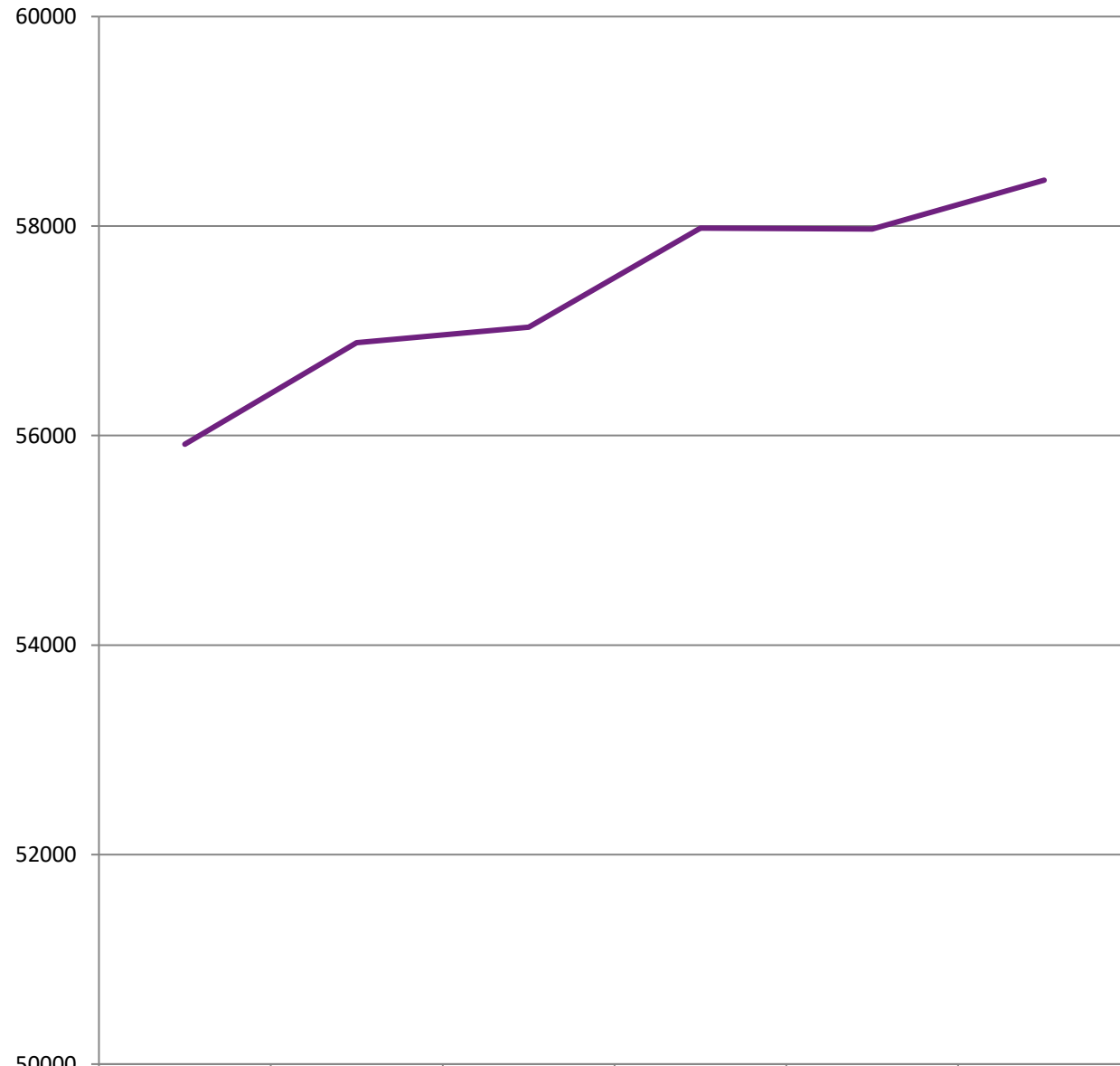


* Het aantal aansluitingen Homes activated upgraded koper vanaf de straatkast is voor de periode van Q4 2020 en eerder naar beneden bijgesteld.

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

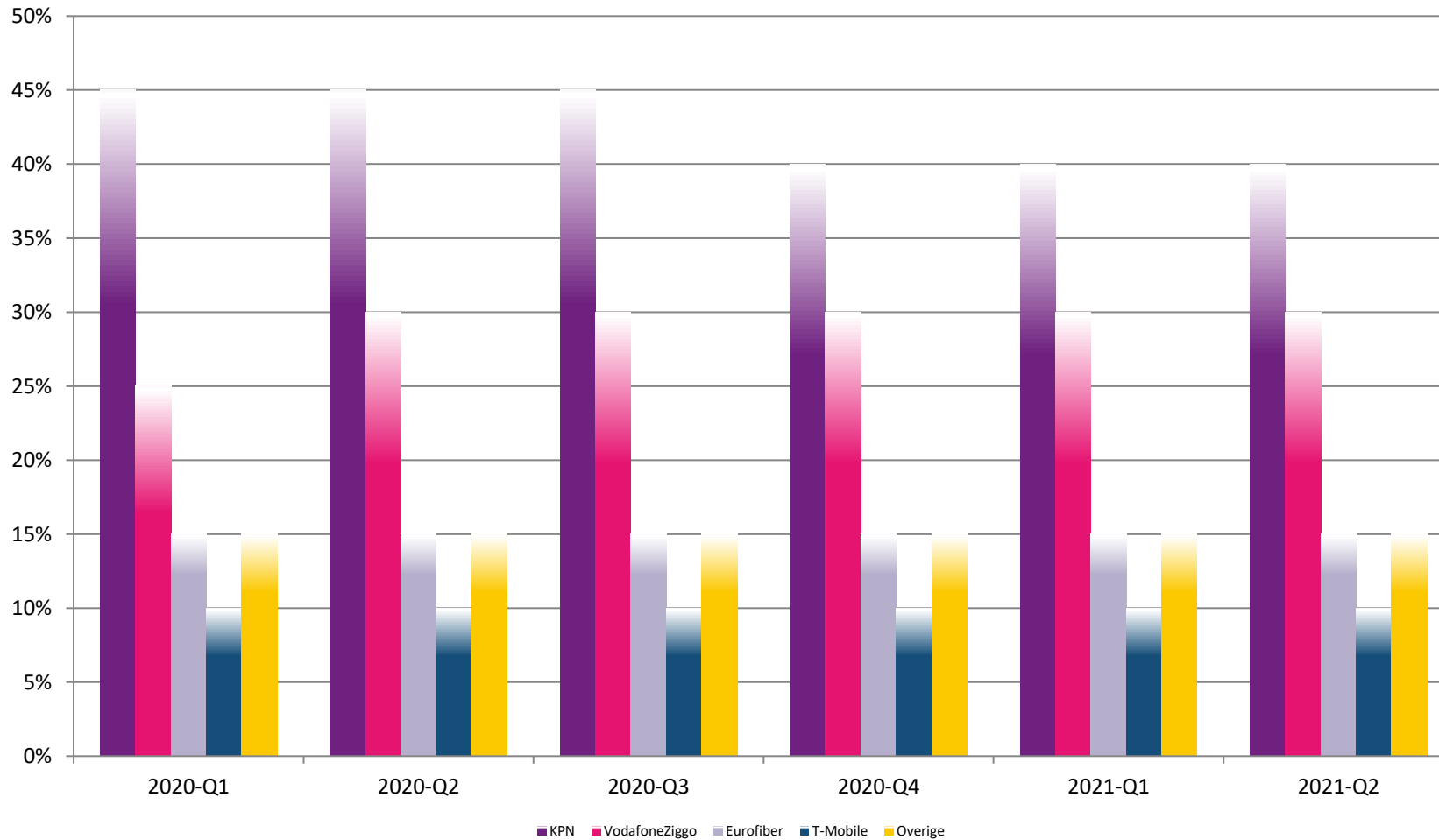


| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|--|---------|---------|---------|---------|---------|---------|
| Retail business active fiber connections | 55917 | 56887 | 57036 | 57979 | 57972 | 58438 |

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

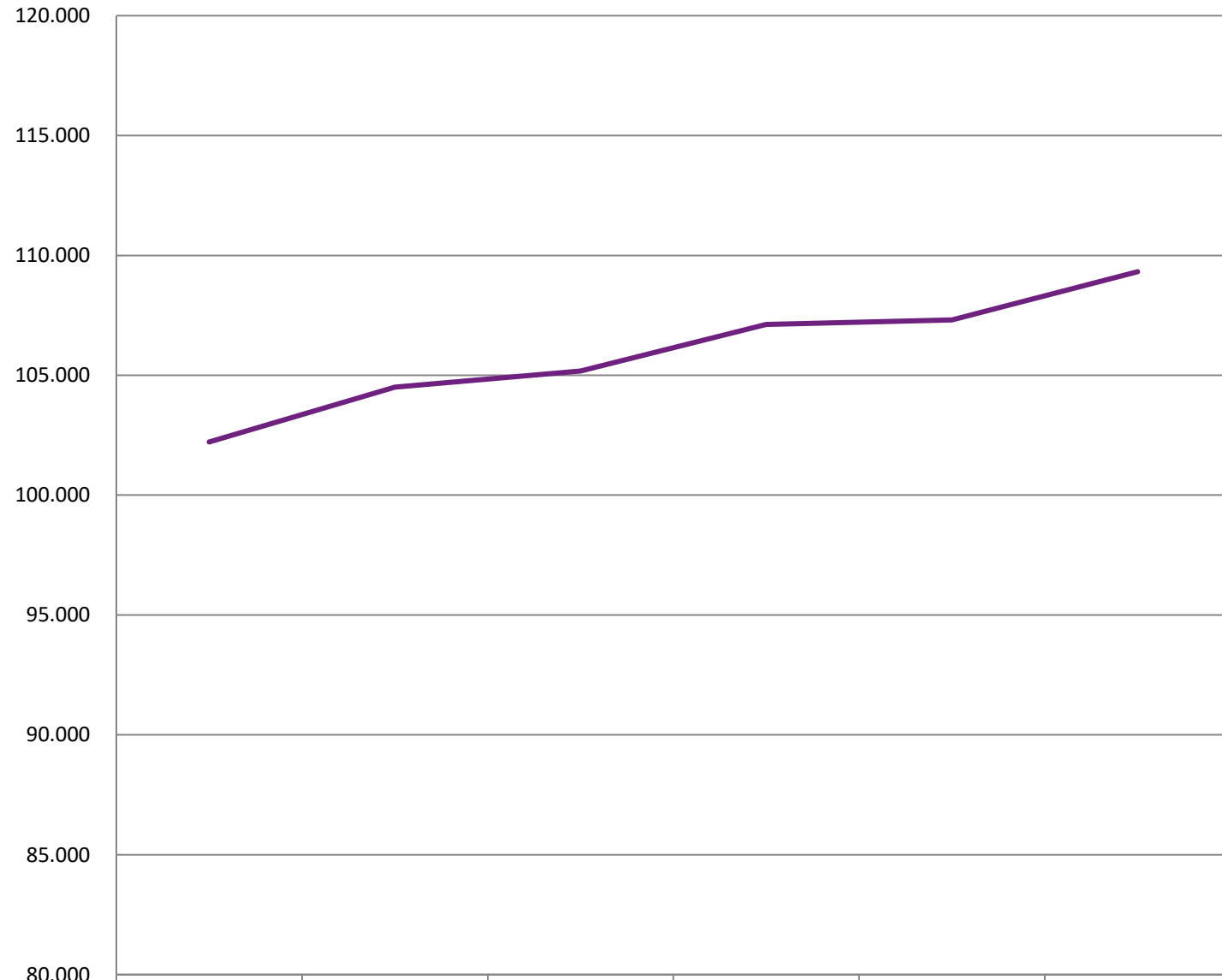


| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|---------------|------------|------------|------------|------------|------------|------------|
| KPN | [40 - 45%] | [40 - 45%] | [40 - 45%] | [35 - 40%] | [35 - 40%] | [35 - 40%] |
| VodafoneZiggo | [20 - 25%] | [25 - 30%] | [25 - 30%] | [25 - 30%] | [25 - 30%] | [25 - 30%] |
| Eurofiber | [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%] |
| Overige | [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

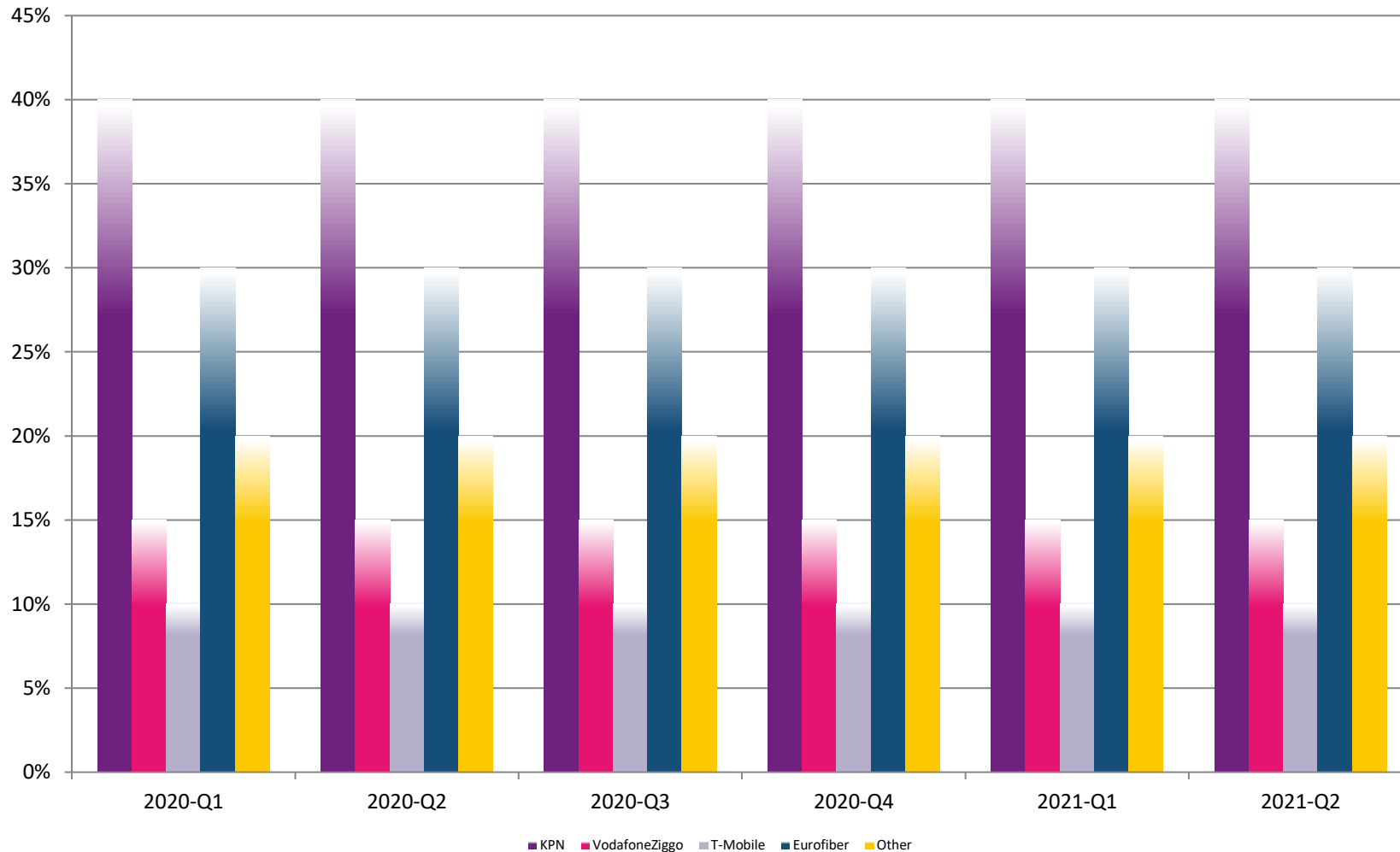
Wholesale business fiber-optic connections



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

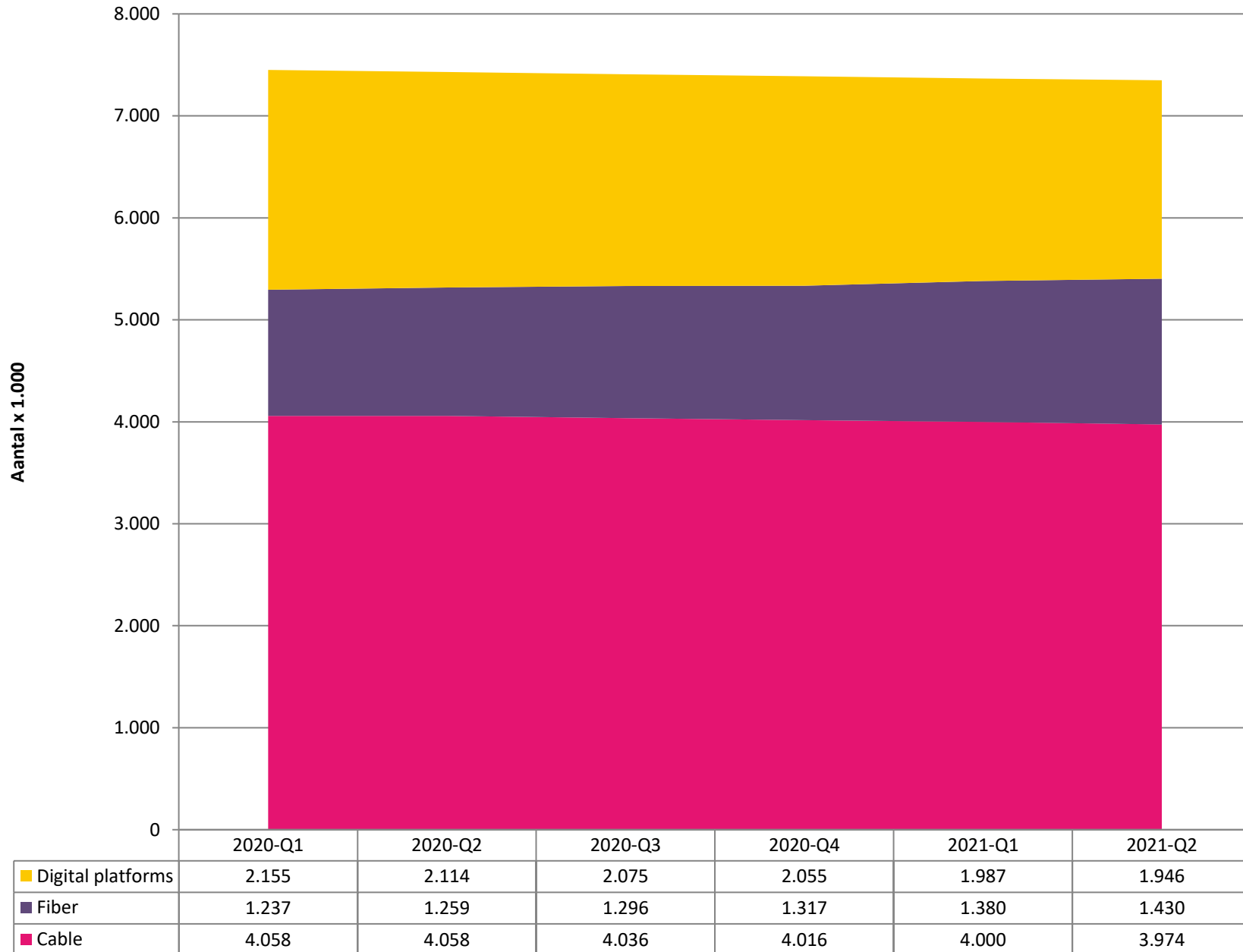


| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|---------------|------------|------------|------------|------------|------------|------------|
| KPN | [35 - 40%] | [35 - 40%] | [35 - 40%] | [35 - 40%] | [35 - 40%] | [35 - 40%] |
| VodafoneZiggo | [10 - 15%] | [10 - 15%] | [10 - 15%] | [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))

Television

Retail subscriptions per connection type

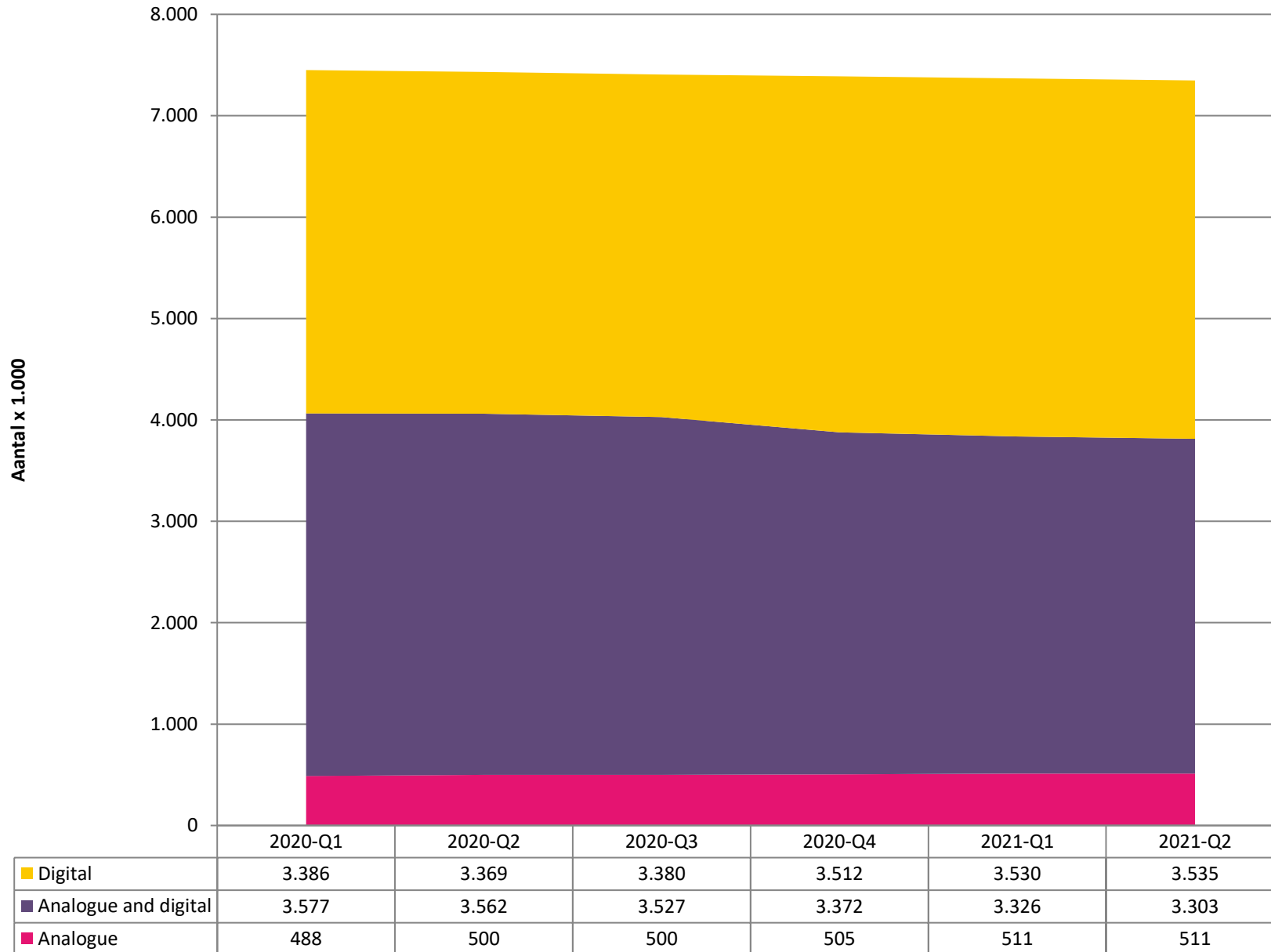


Op basis van vragen 40_A1_1_1-2-3, 40_A1_2_1-2, 40_A1_3_1-2-3, en 40_A1_4_1-2-3-4 van de Telecommonitor

Digitale platforms zijn bijvoorbeeld DSL, Digitenne en Satelliet.

Television

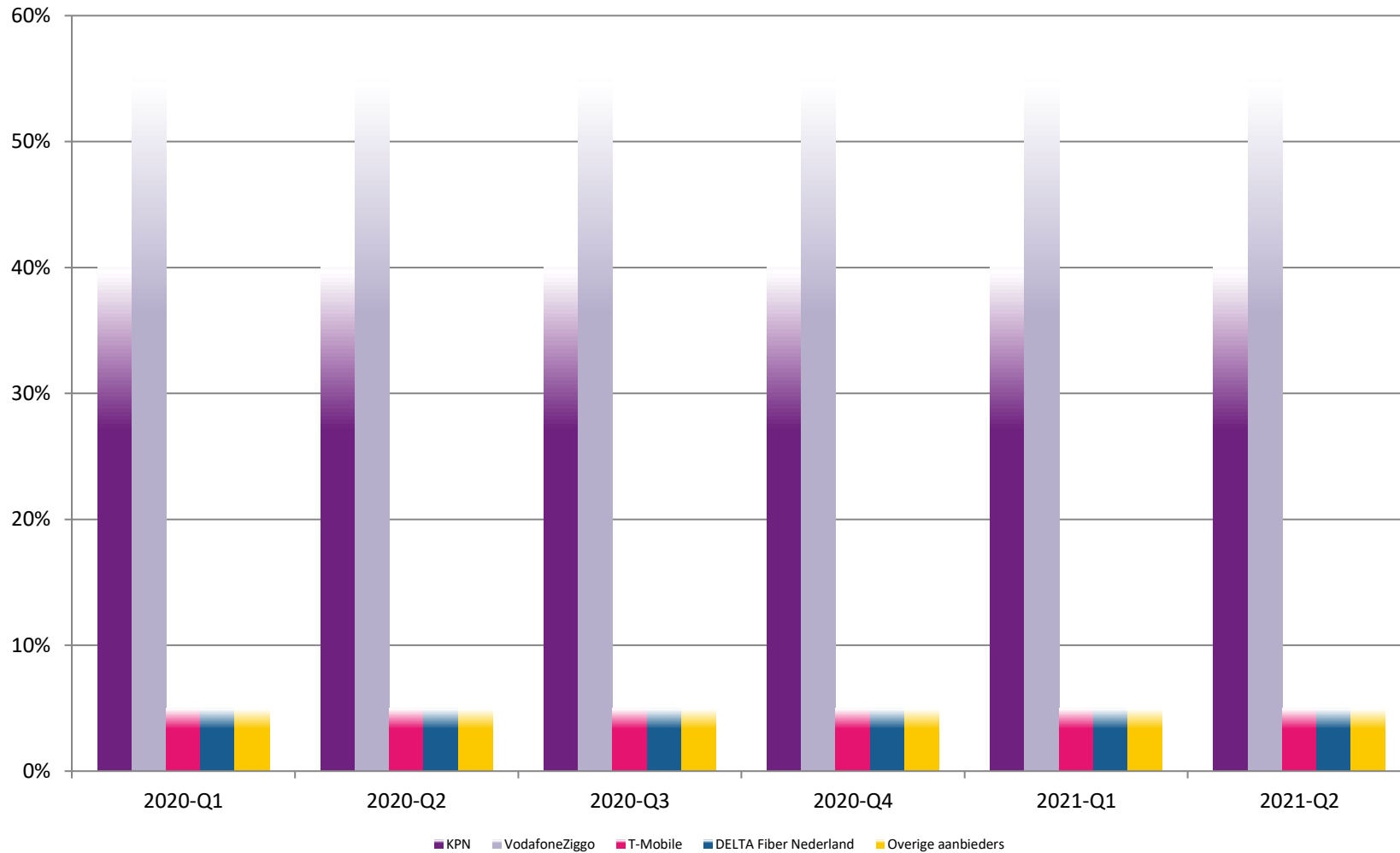
Digitalization of television subscriptions



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



| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|-----------------------|------------|------------|------------|------------|------------|------------|
| 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

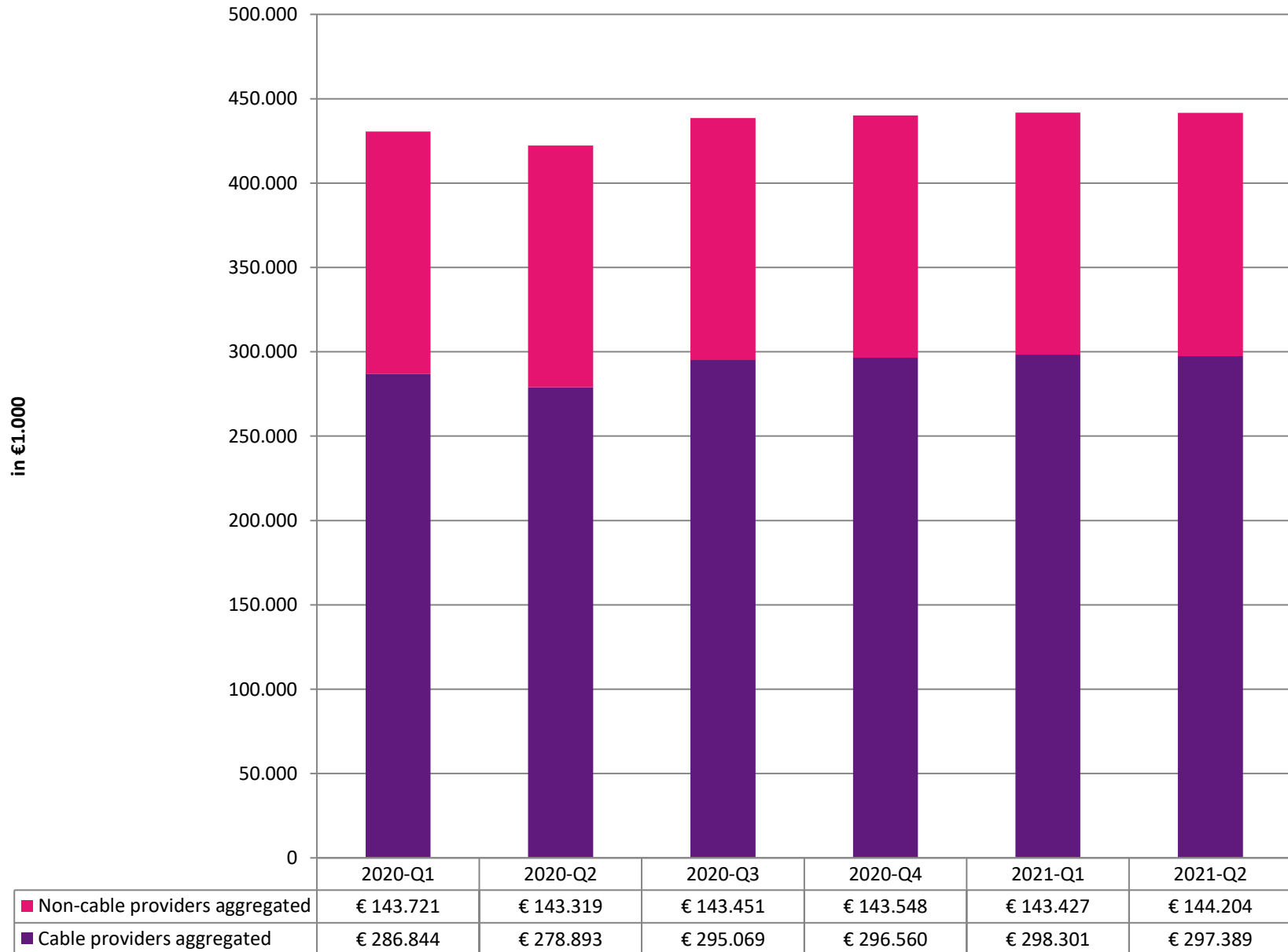
Television

Retail churn of television subscriptions



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

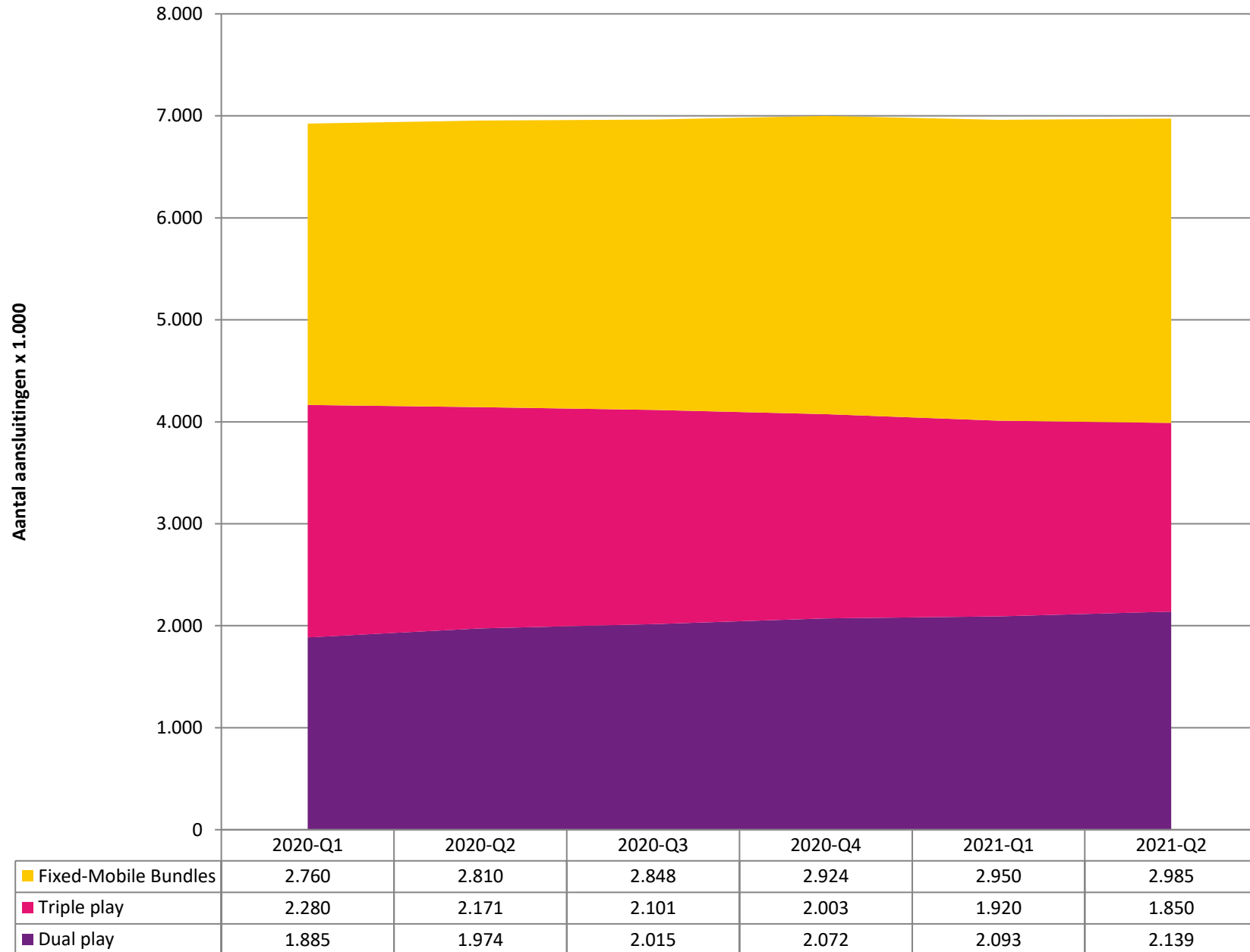
Homes passed and cable penetration level



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

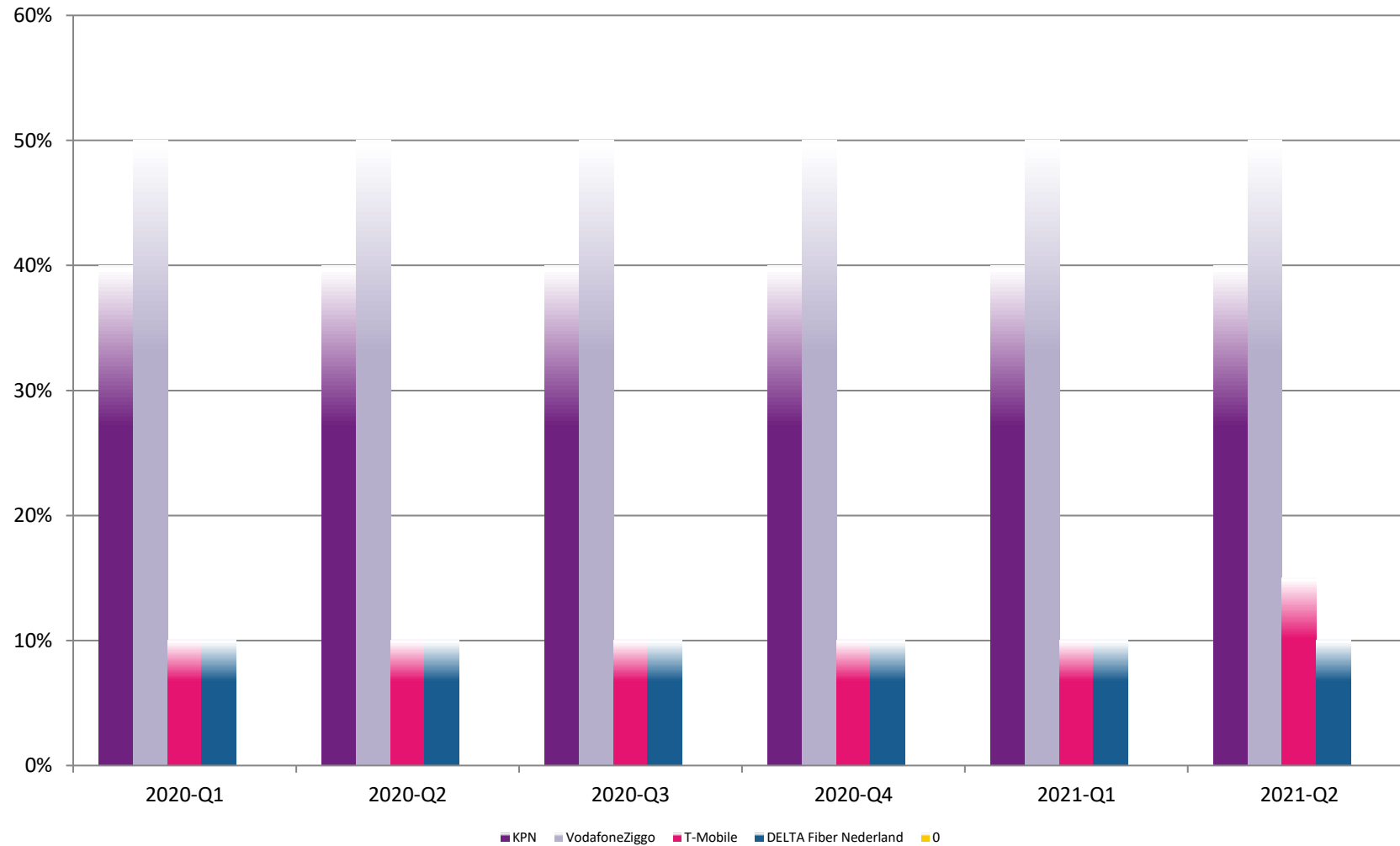


Op basis van vragen 50_A1_1_1-2-3-5-6, 50_A1_2_1-2-3-4, en 50_A1_3_1 van de Telecommonitor

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

Bundles

Retail market share of bundles



| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|-----------------------|------------|------------|------------|------------|------------|------------|
| 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%] | [10 - 15%] |
| DELTA Fiber Nederland | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] | [5 - 10%] |
| Other | [0 - 0%] | [0 - 0%] | [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



| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|---------------|------------|------------|------------|------------|------------|------------|
| 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%] | [10 - 15%] |

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



| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|--|---------|---------|---------|---------|---------|---------|
| ■ Broadband in Fixed-Mobile | 25% | 25% | 26% | 26% | 26% | 26% |
| ■ Broadband in triple play | 41% | 40% | 39% | 38% | 38% | 37% |
| ■ Broadband in dual play | 26% | 27% | 28% | 28% | 29% | 29% |
| ■ Broadband only | 7% | 7% | 7% | 7% | 8% | 8% |
| — Breedband in vast-mobiel | 37% | 38% | 38% | 39% | 39% | 39% |

Bundles

Retail connections with television

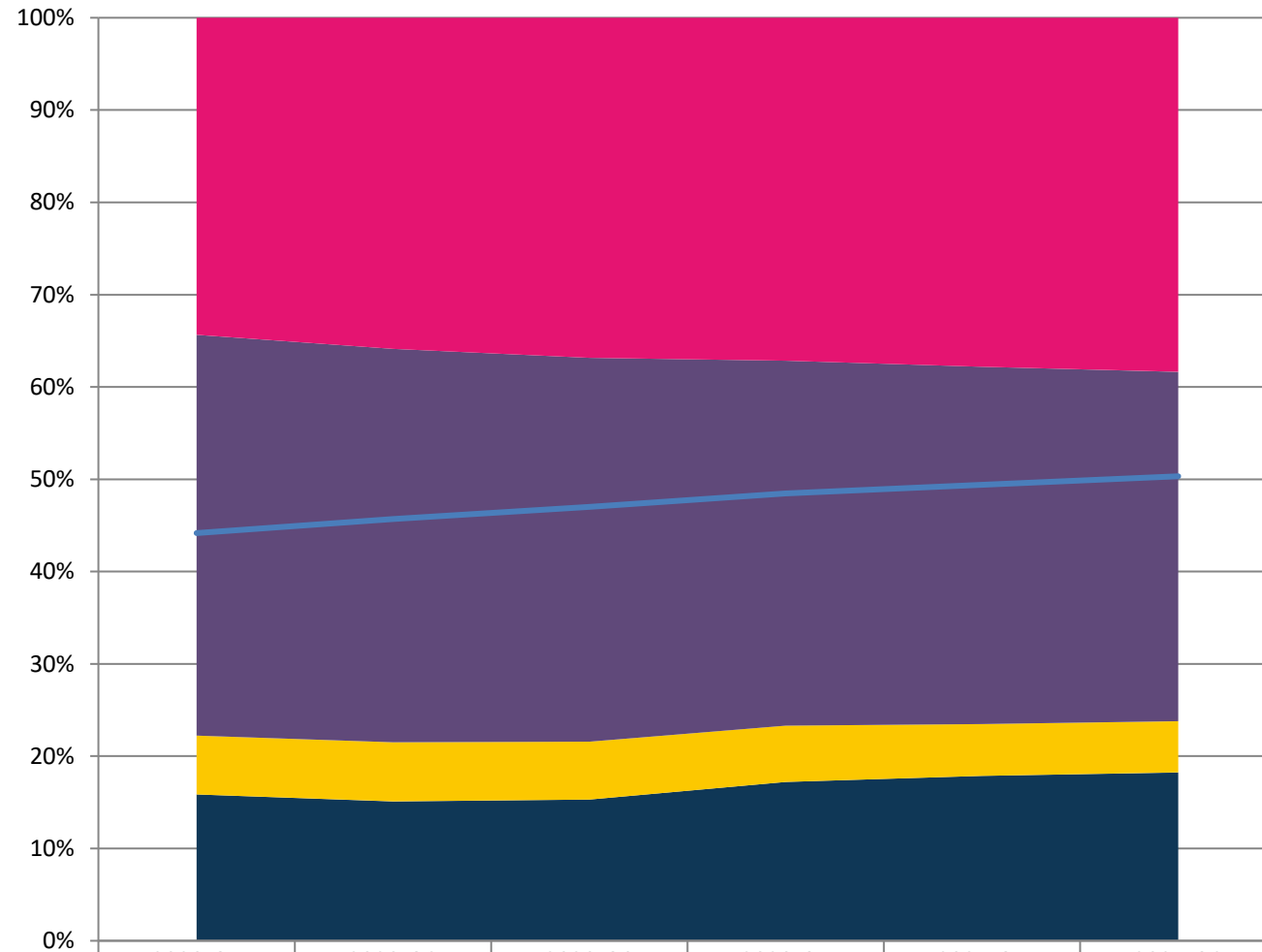


| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|--------------------|---------|---------|---------|---------|---------|---------|
| TV in Fixed-Mobile | 24% | 25% | 25% | 26% | 26% | 26% |
| TV in triple play | 39% | 38% | 37% | 37% | 36% | 36% |
| TV in dual play | 20% | 22% | 22% | 23% | 24% | 25% |
| TV only | 16% | 16% | 15% | 14% | 14% | 13% |
| TV in vast-mobiel | 53% | 55% | 56% | 58% | 59% | 60% |

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



| | 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 |
|---------------------------------|---------|---------|---------|---------|---------|---------|
| Fixed telephony in Fixed-Mobile | 34% | 36% | 37% | 37% | 38% | 38% |
| Fixed telephony in triple play | 43% | 43% | 42% | 40% | 39% | 38% |
| Fixed telephony in dual play | 6% | 6% | 6% | 6% | 6% | 6% |
| Fixed telephony only | 16% | 15% | 15% | 17% | 18% | 18% |
| Vaste telefonie in vast-mobiel | 44% | 46% | 47% | 48% | 49% | 50% |

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

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. Mobiele operator met eigen netwerk. |
| MVNO | Mobile Virtual Network Operator. Mobiele operator die gebruik maakt van het netwerk van derden. |

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. |



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. |
|-------------|--|