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Consument & Markt



Telecom Monitor

Q4 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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Annual figures

Fixed network related revenues

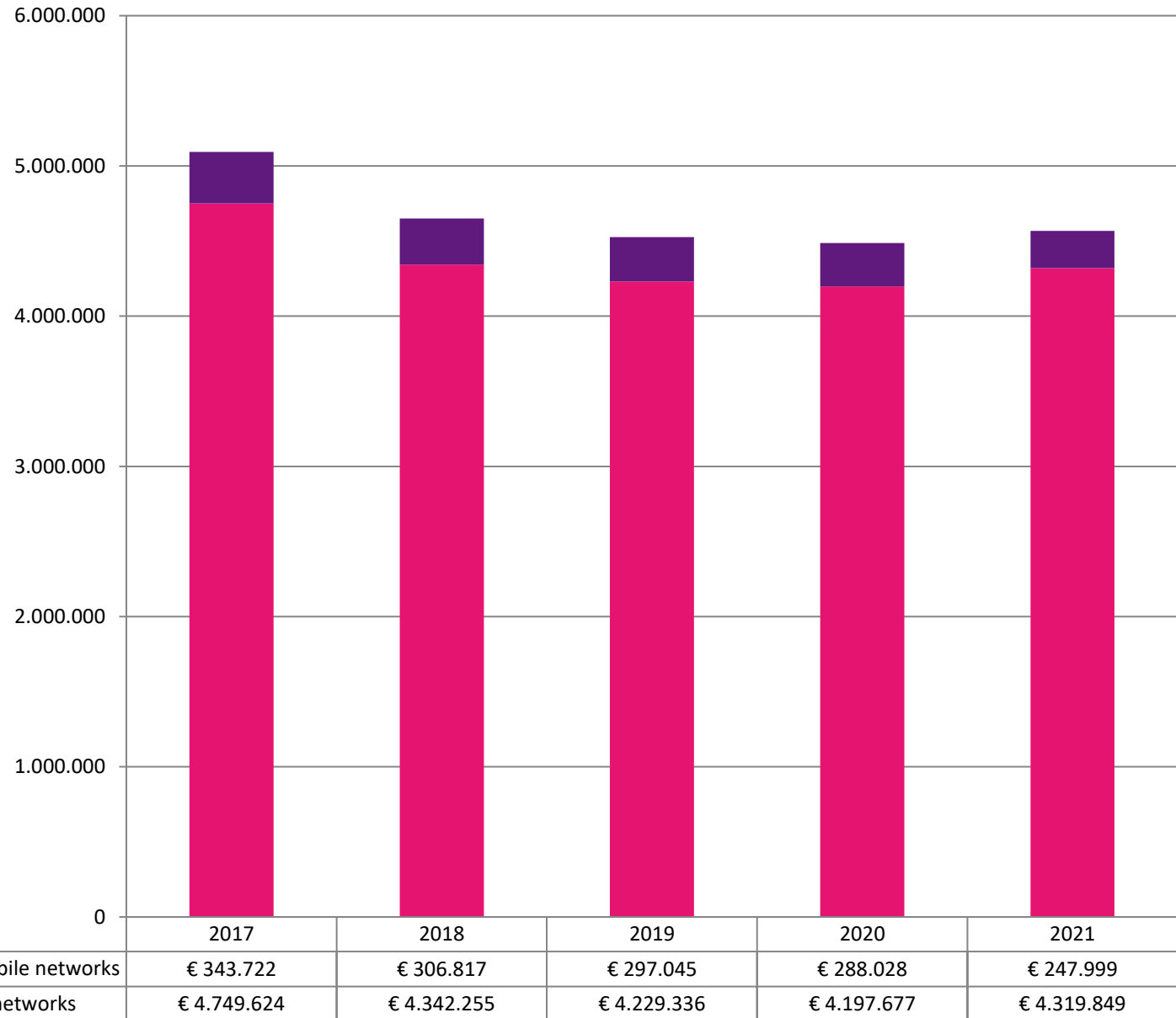


Annual figures

Mobile network related revenues



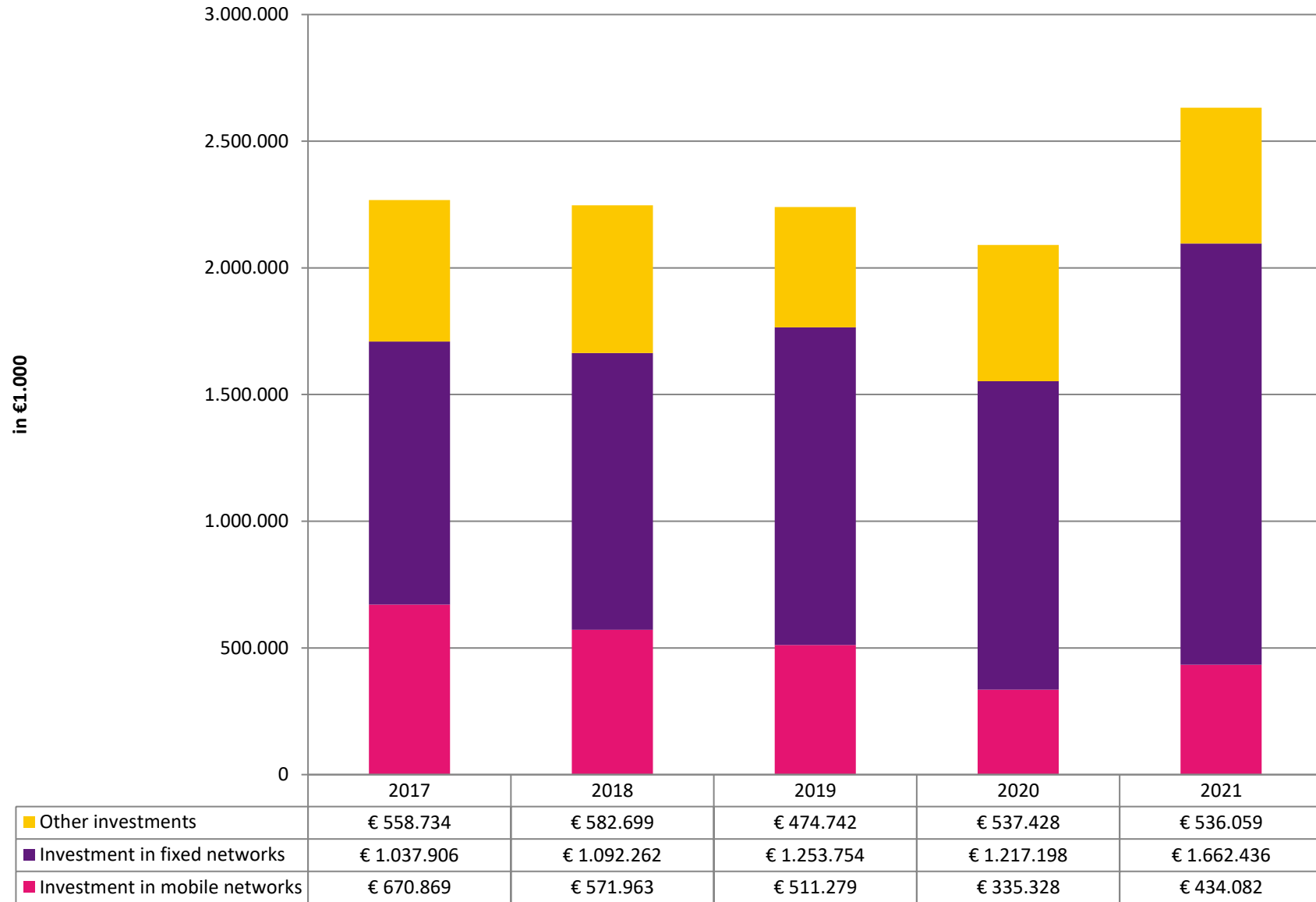
in €1.000



Op basis van vragen 0_A1_1_1-2-3 en 0_A1_2_1-2-3 van de Telecommonitor

Annual figures

Mobile and fixed network investments



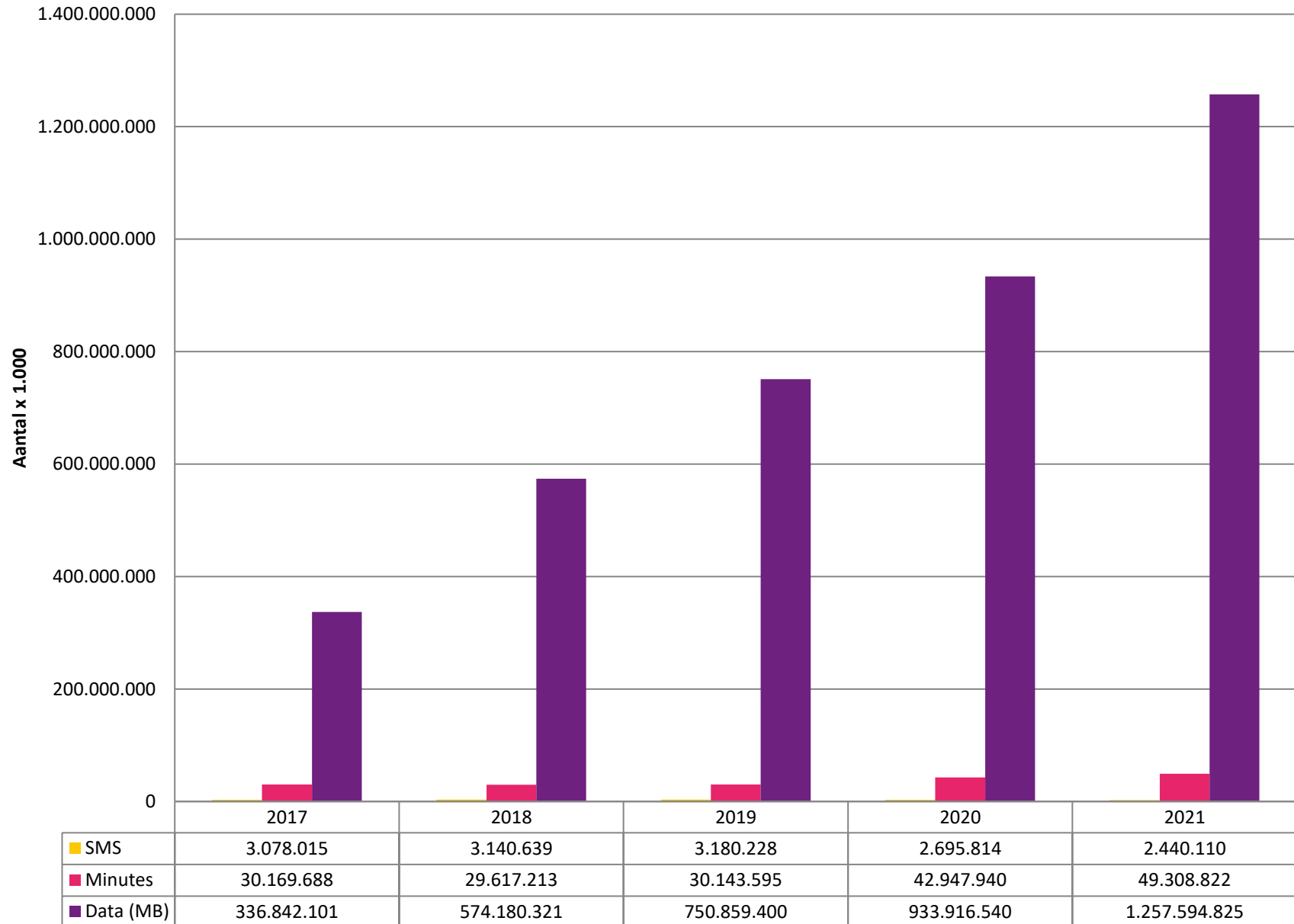
* Investerings in vaste netwerken in 2021 zijn inclusief investeringen van de glasvezelaanbieders die de ACM in 2021 heeft toegevoegd aan de Telecommonitor.

Zie pagina 60 van deze rapportage voor een lijst met bevraagde marktpartijen.

Op basis van vragen 0_A2_1_1-2-3 van de Telecommonitor

Annual figures

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

Annual figures

Retail connections by speed

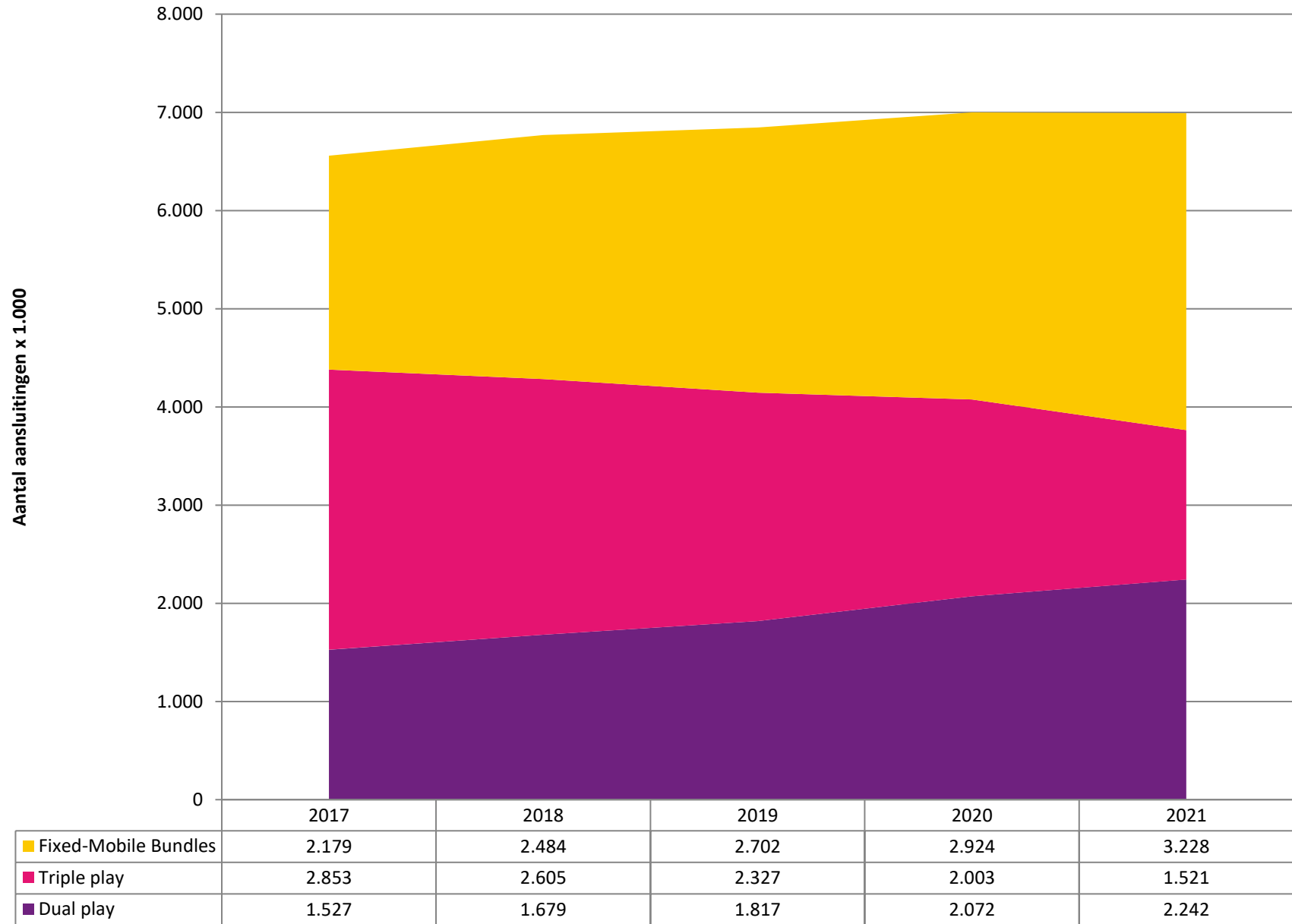


	2017	2018	2019	2020	2021
■ ≥ 100 Mbps	41,4%	43,9%	45,7%	48,8%	53,6%
■ ≥ 30 Mbps, < 100 Mbps	45,3%	46,2%	46,0%	43,7%	40,5%
■ ≥ 10 Mbps, < 30 Mbps	11,8%	8,9%	7,7%	6,6%	5,8%
■ < 10 Mbps	1,5%	1,0%	0,6%	1,0%	0,1%

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

Annual figures

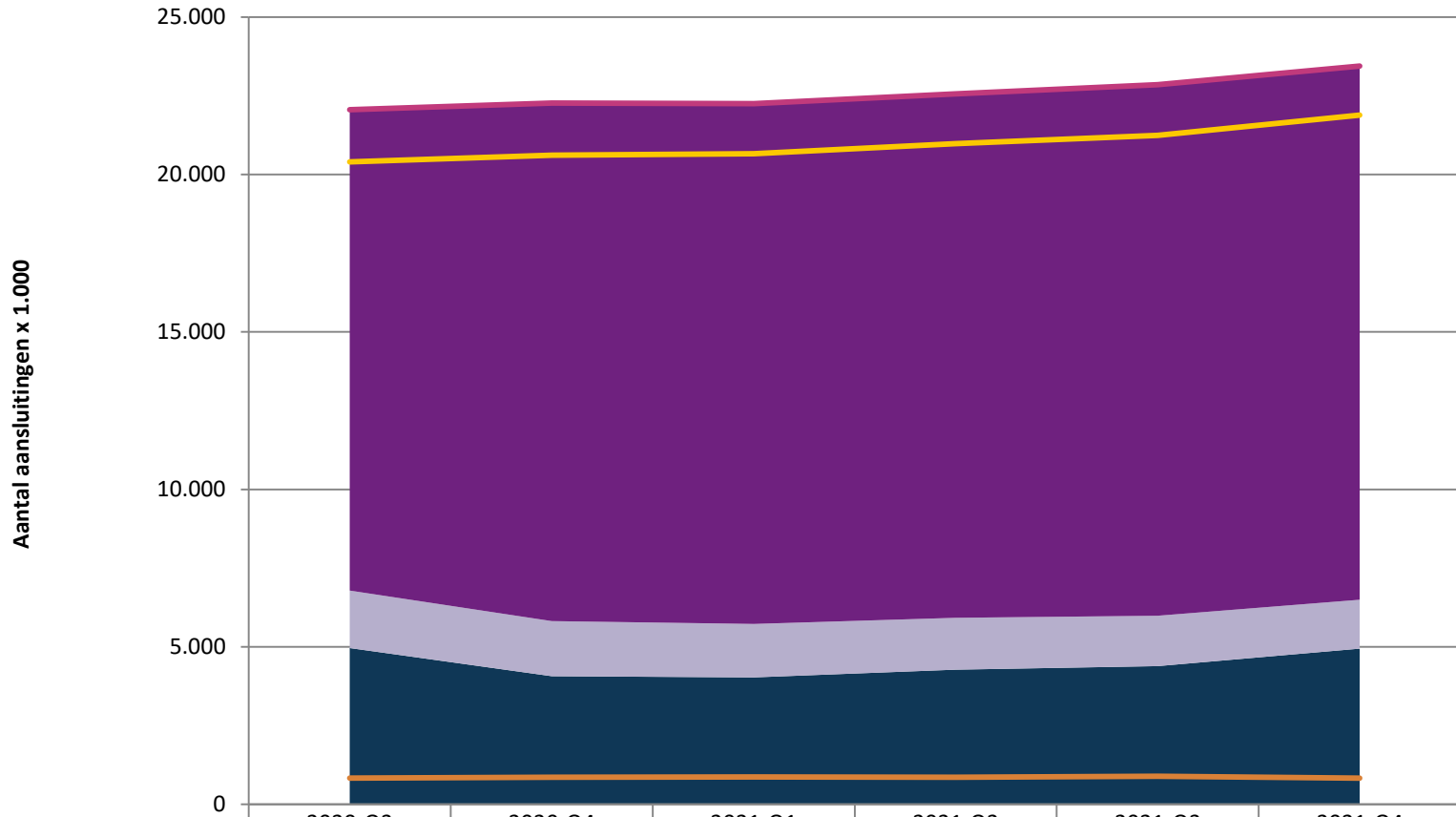
Bundles of telecommunication services



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

Mobile

Retail connections

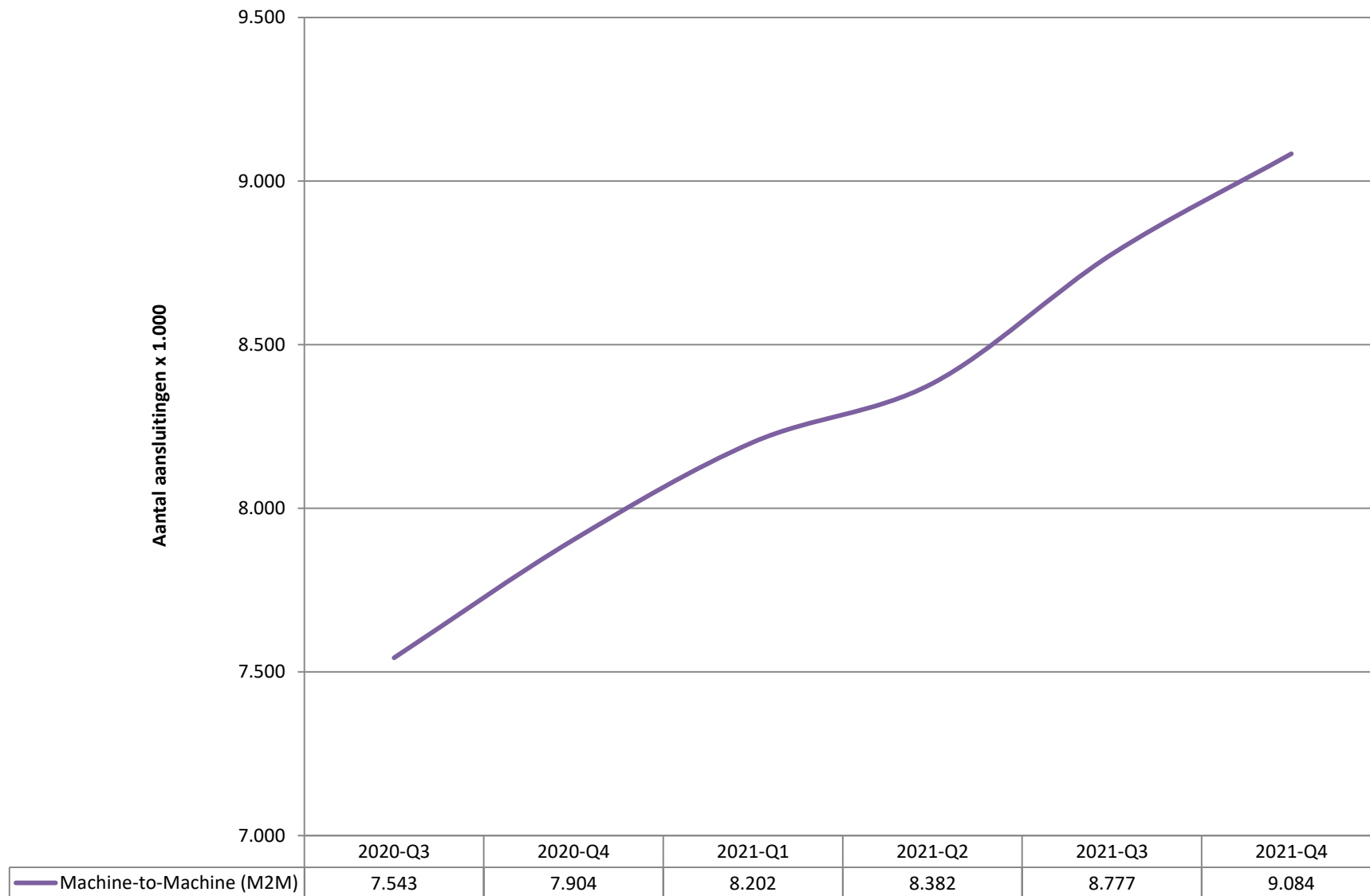


	2020-Q3	2020-Q4	2021-Q1	2021-Q2	2021-Q3	2021-Q4
Postpaid MNO	15.273	16.450	16.520	16.647	16.865	16.950
Prepaid MNO	1.825	1.756	1.698	1.647	1.597	1.551
Postpaid and prepaid MVNO	4.962	4.065	4.029	4.271	4.392	4.945
Total mobile connections	22.059	22.270	22.247	22.565	22.854	23.446
Of which bundled (data and speech)	20.403	20.610	20.661	20.978	21.243	21.888
Of which data only connections	832	855	864	861	890	833

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

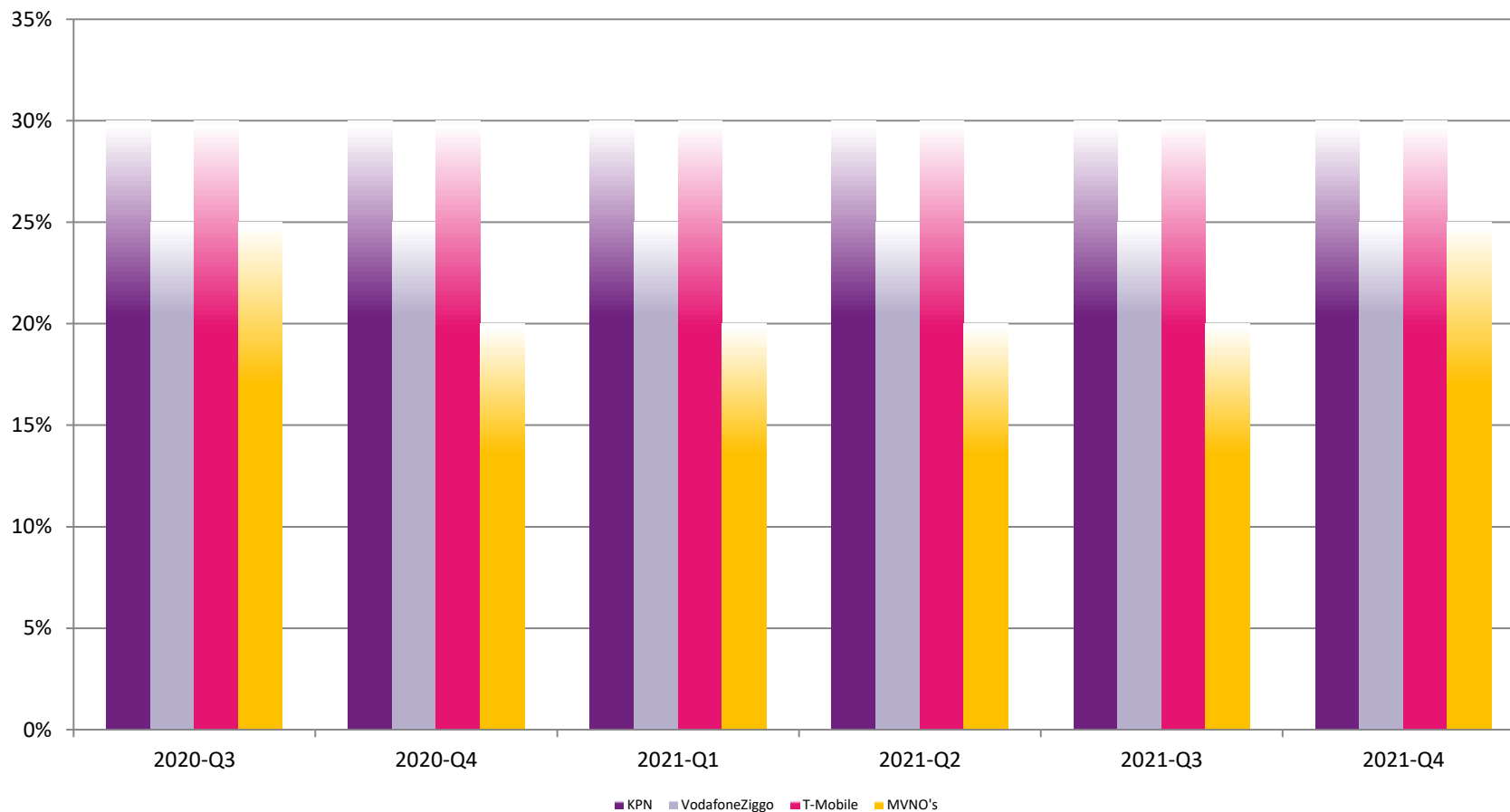
Machine-to-Machine connections



Op basis van vragen 10_A1_4_1 van de Telecommonitor

Mobile

Retail market share based on connections

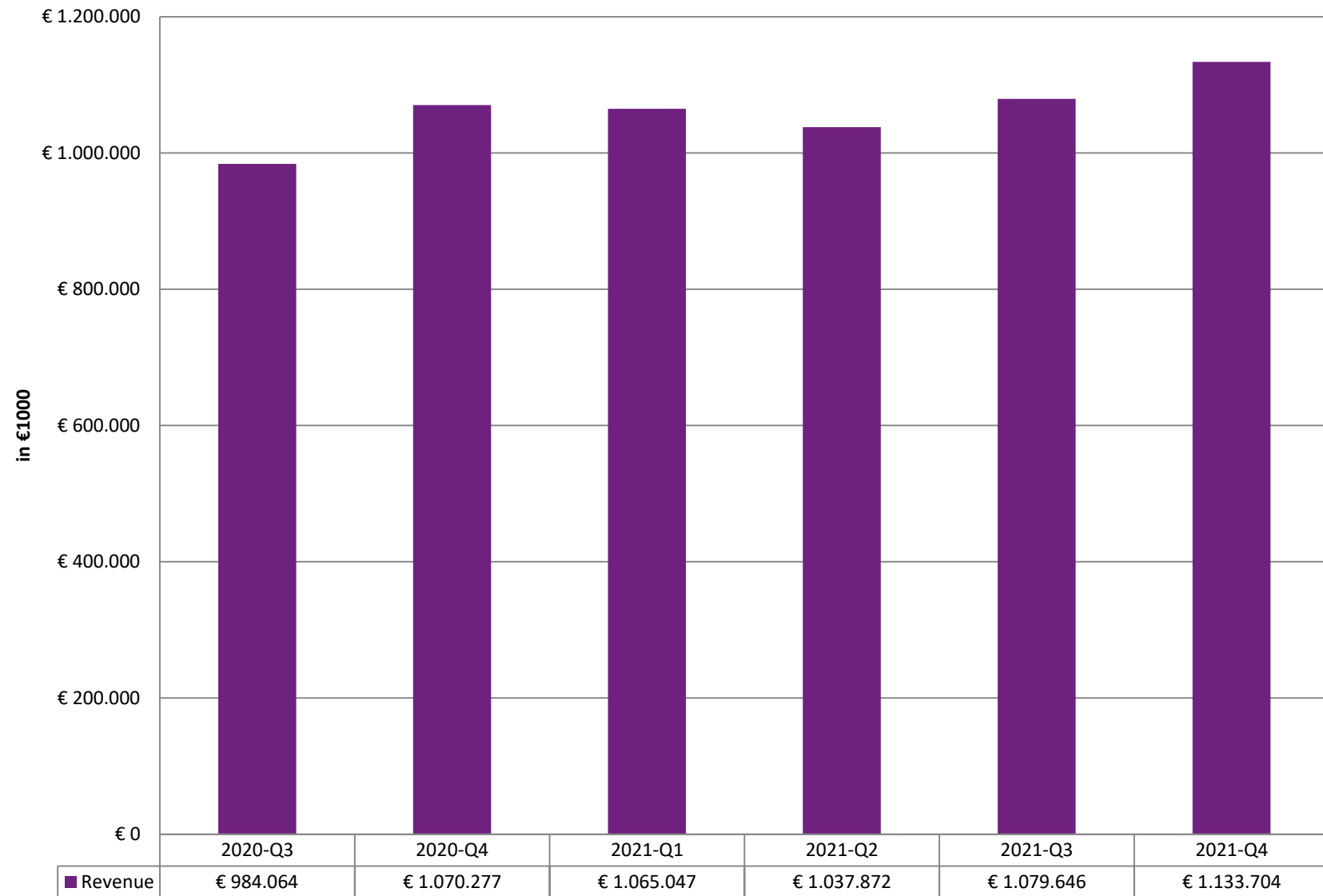


	2020-Q3	2020-Q4	2021-Q1	2021-Q2	2021-Q3	2021-Q4
KPN	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
VodafoneZiggo	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]
T-Mobile	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
MVNO's	[20 - 25%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[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

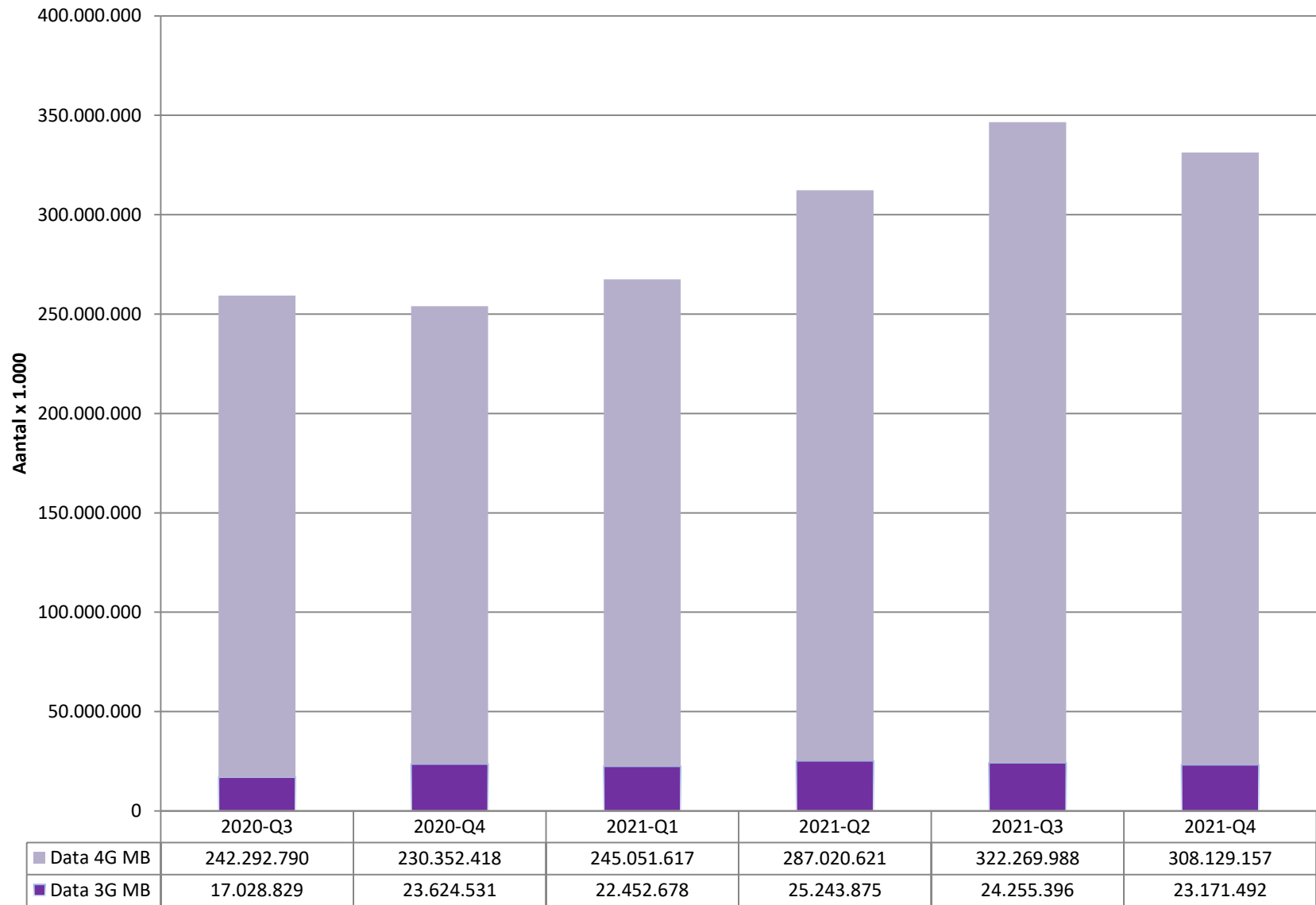
Retail revenue of Mobile Network Operators (MNOs)



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

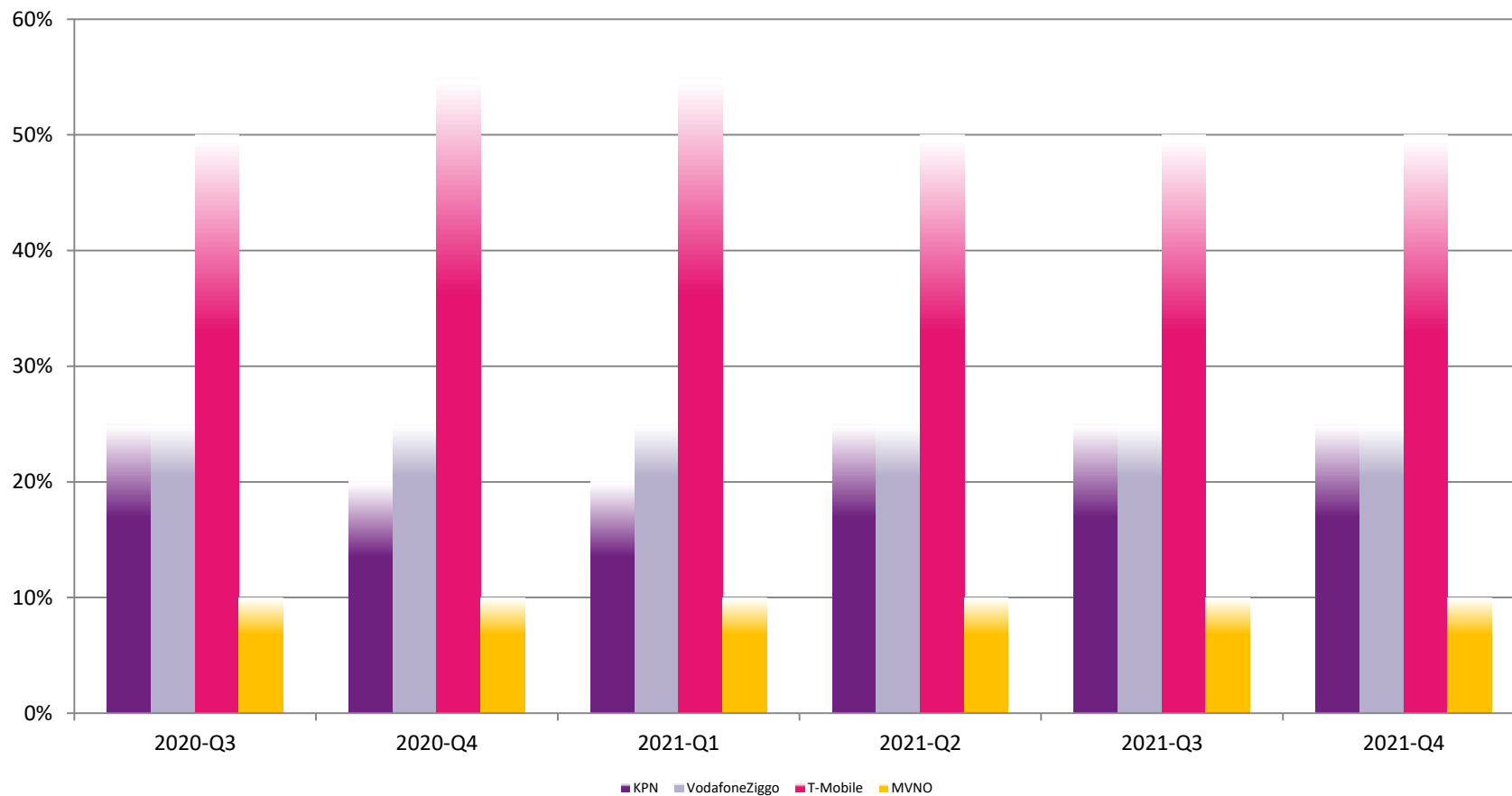
Retail volume 3G/4G data



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

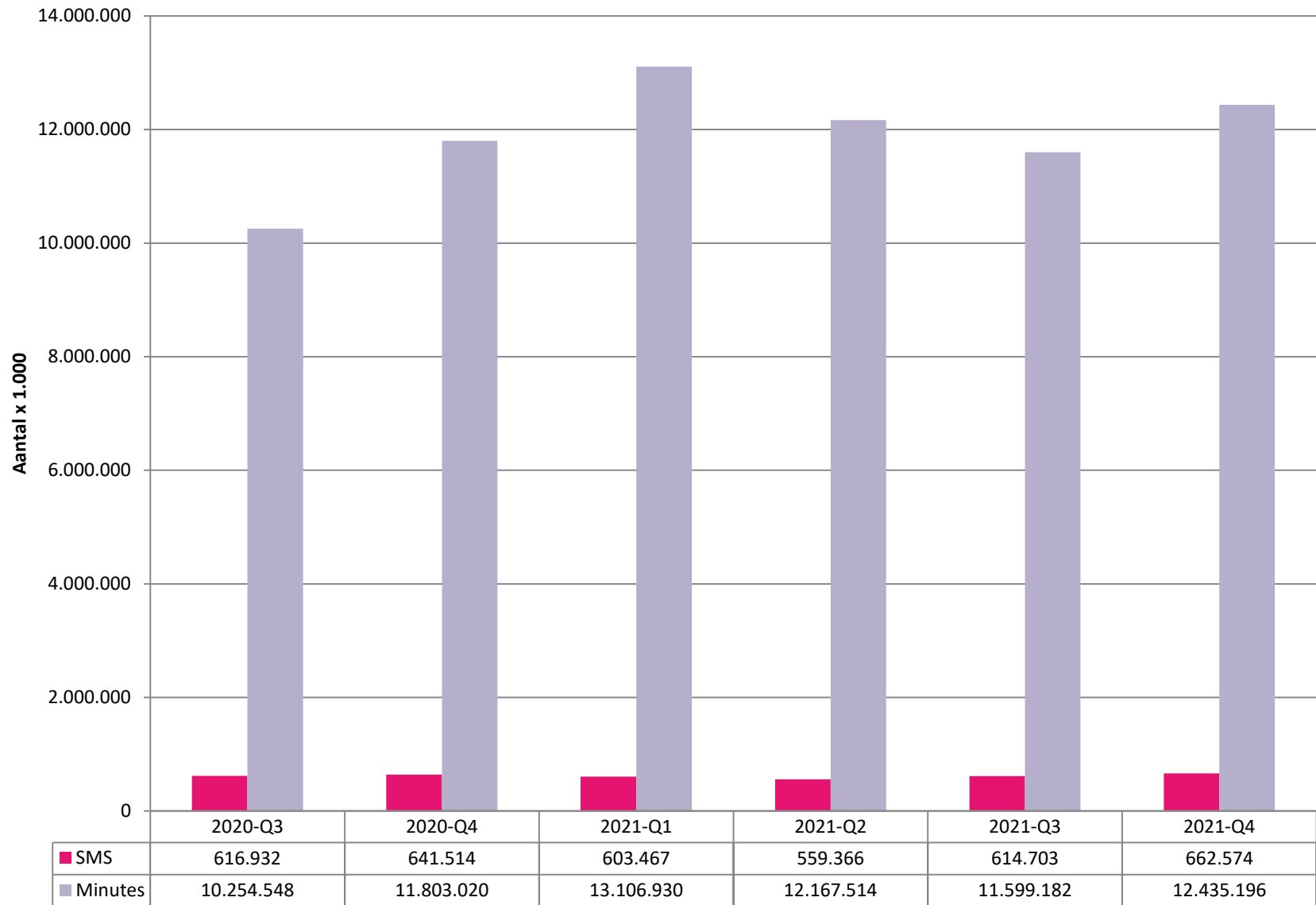


	2020-Q3	2020-Q4	2021-Q1	2021-Q2	2021-Q3	2021-Q4
KPN	[20 - 25%]	[15 - 20%]	[15 - 20%]	[20 - 25%]	[20 - 25%]	[20 - 25%]
VodafoneZiggo	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]
T-Mobile	[45 - 50%]	[50 - 55%]	[50 - 55%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
MVNO	[5 - 10%]	[5 - 10%]	[5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



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

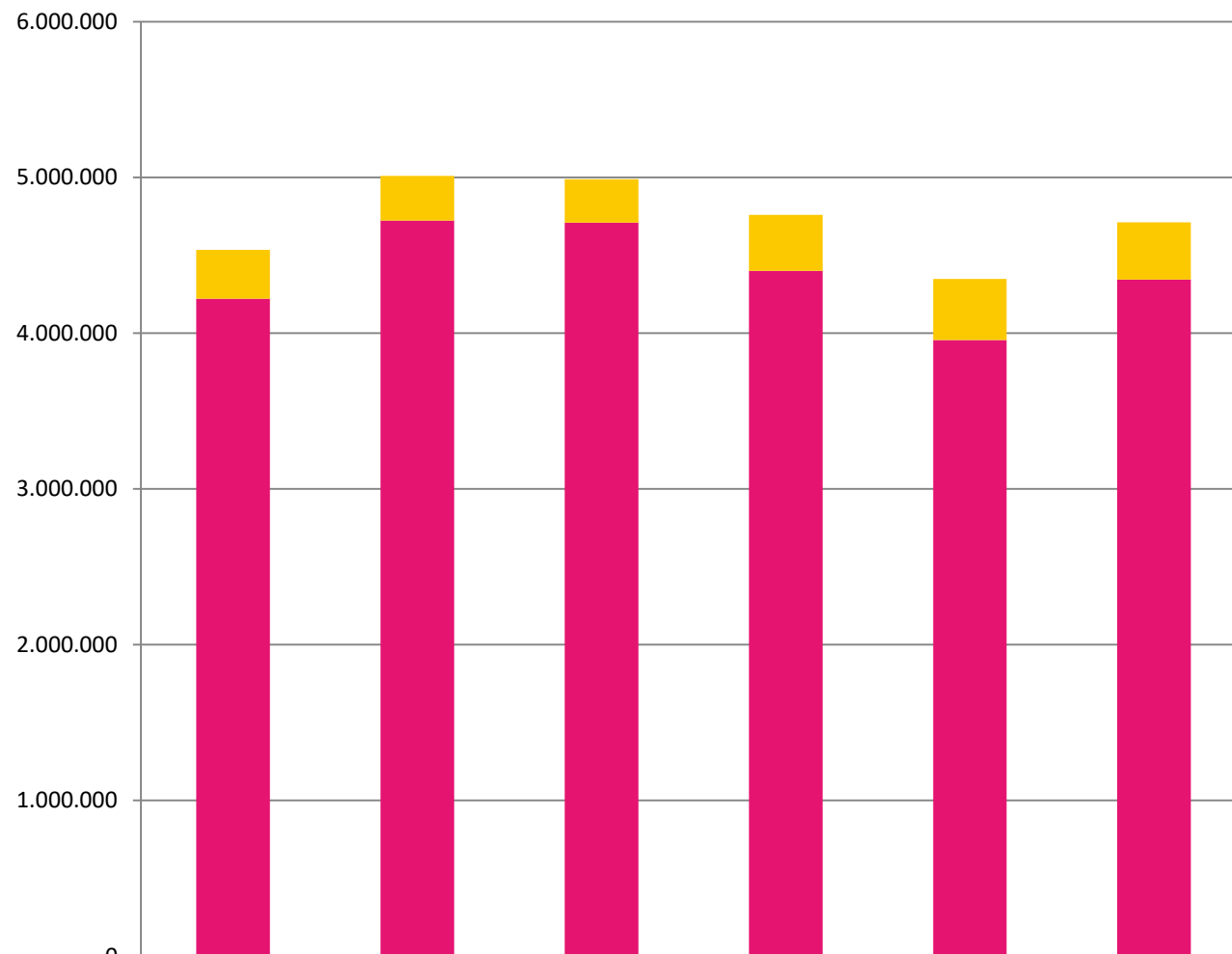
Op basis van vragen 10_A3_1_1, 10_A3_2_1, 10_A3_3_1, 10_A3_4_1, en 10_B3_1_1 van de Telecommonitor

Mobile

Wholesale volume of call termination (excluding onnet)



Minuten x 1.000



	2020-Q3	2020-Q4	2021-Q1	2021-Q2	2021-Q3	2021-Q4
Volume terminated from national networks	314.514	285.849	277.763	359.541	391.163	366.905
Volume terminated from abroad	4.220.924	4.723.289	4.710.561	4.399.829	3.956.862	4.344.717

Op basis van vragen 10_C2_1_1-2-3-4-5 van de Telecommonitor

Fixed telephony

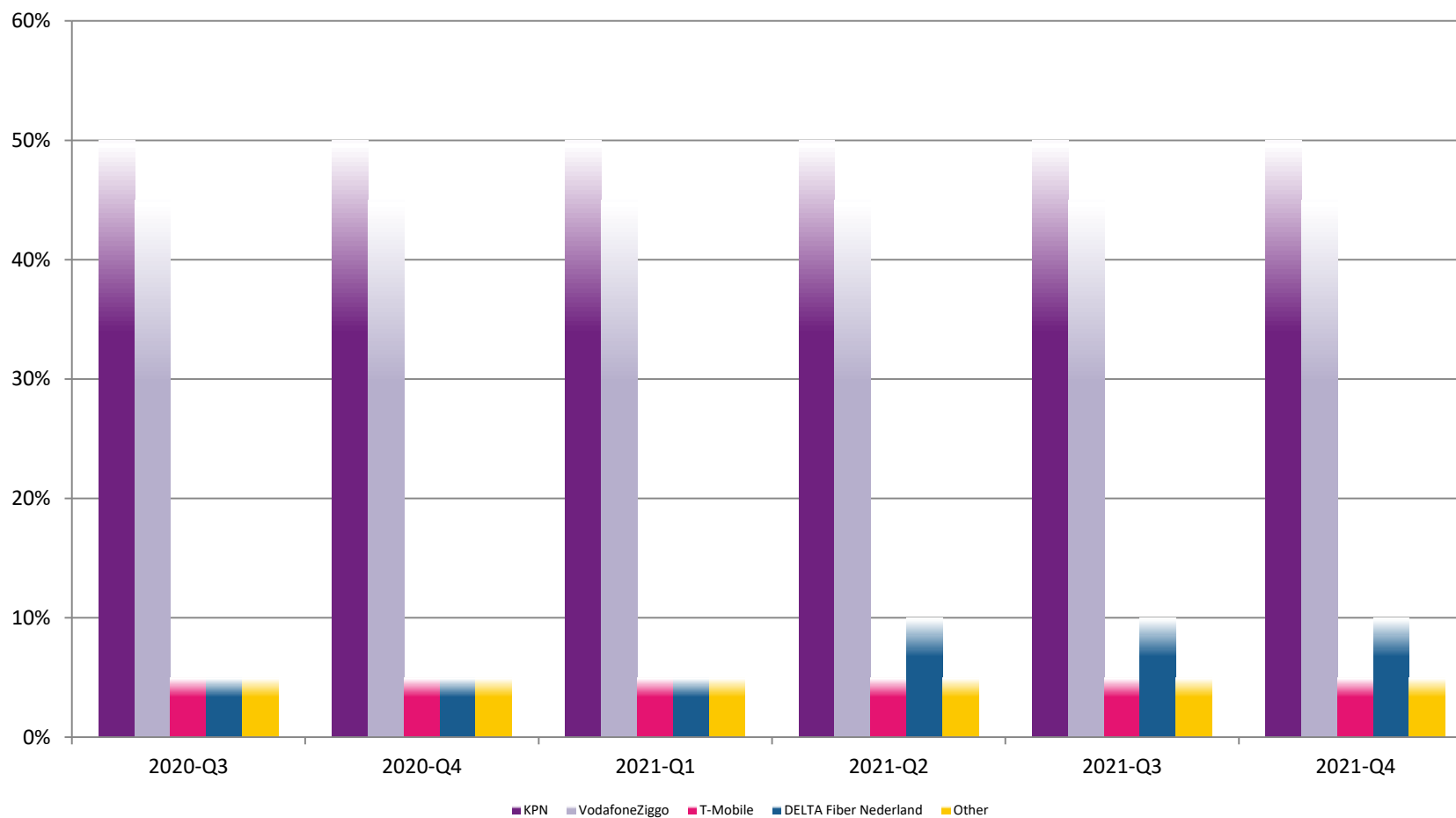
Retail single connections



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



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

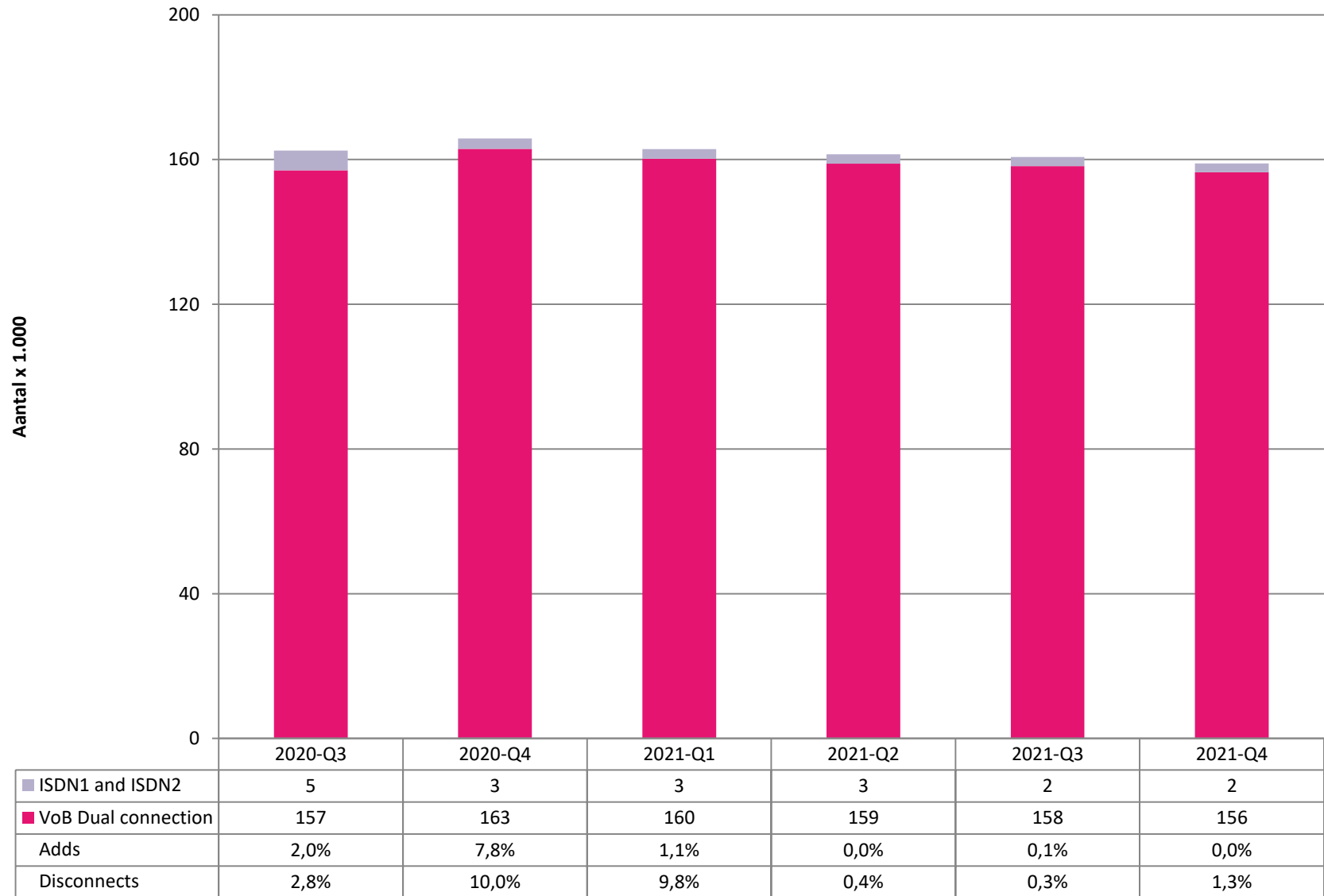
Retail turnover PSTN and VoB



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

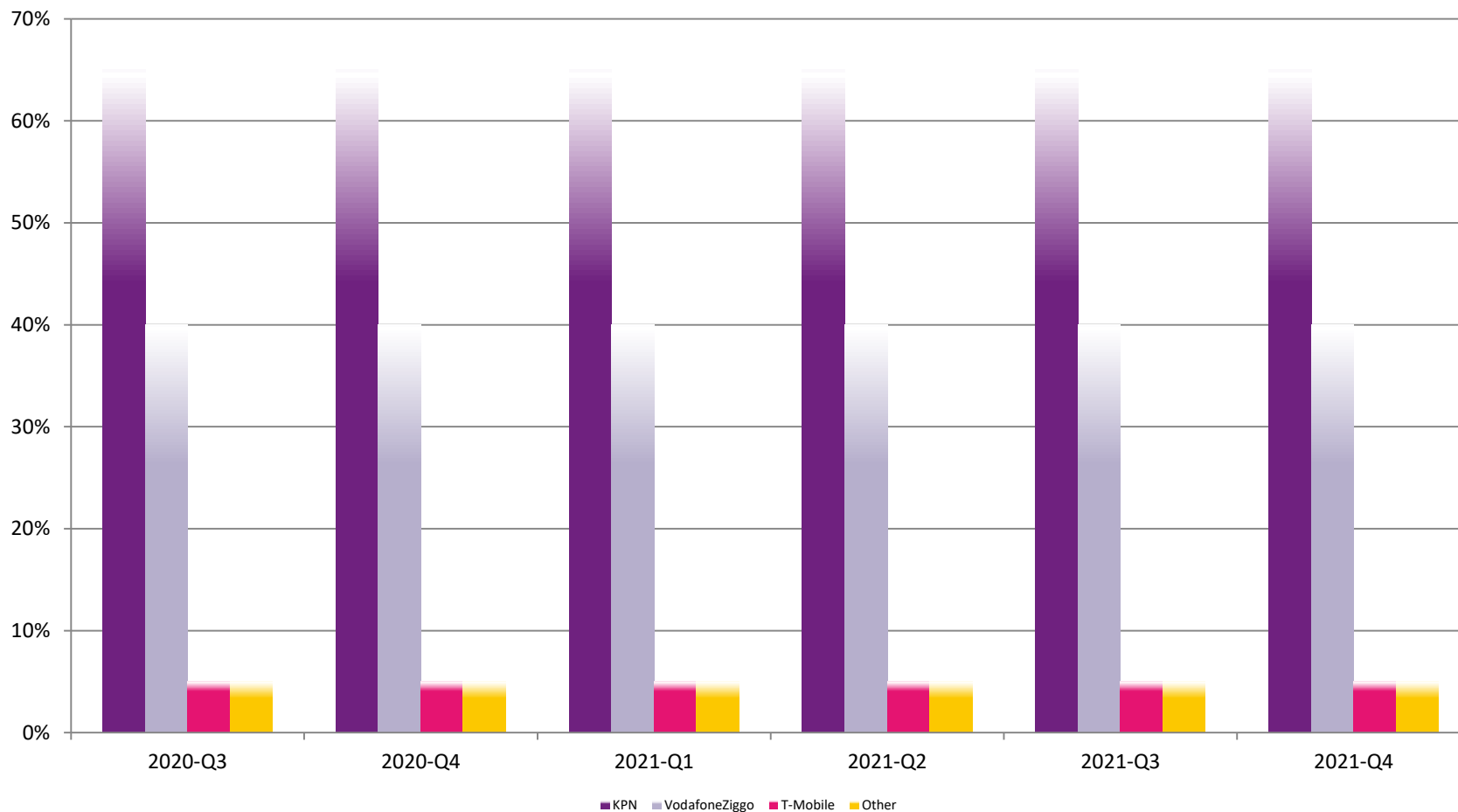
Retail dual connections



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

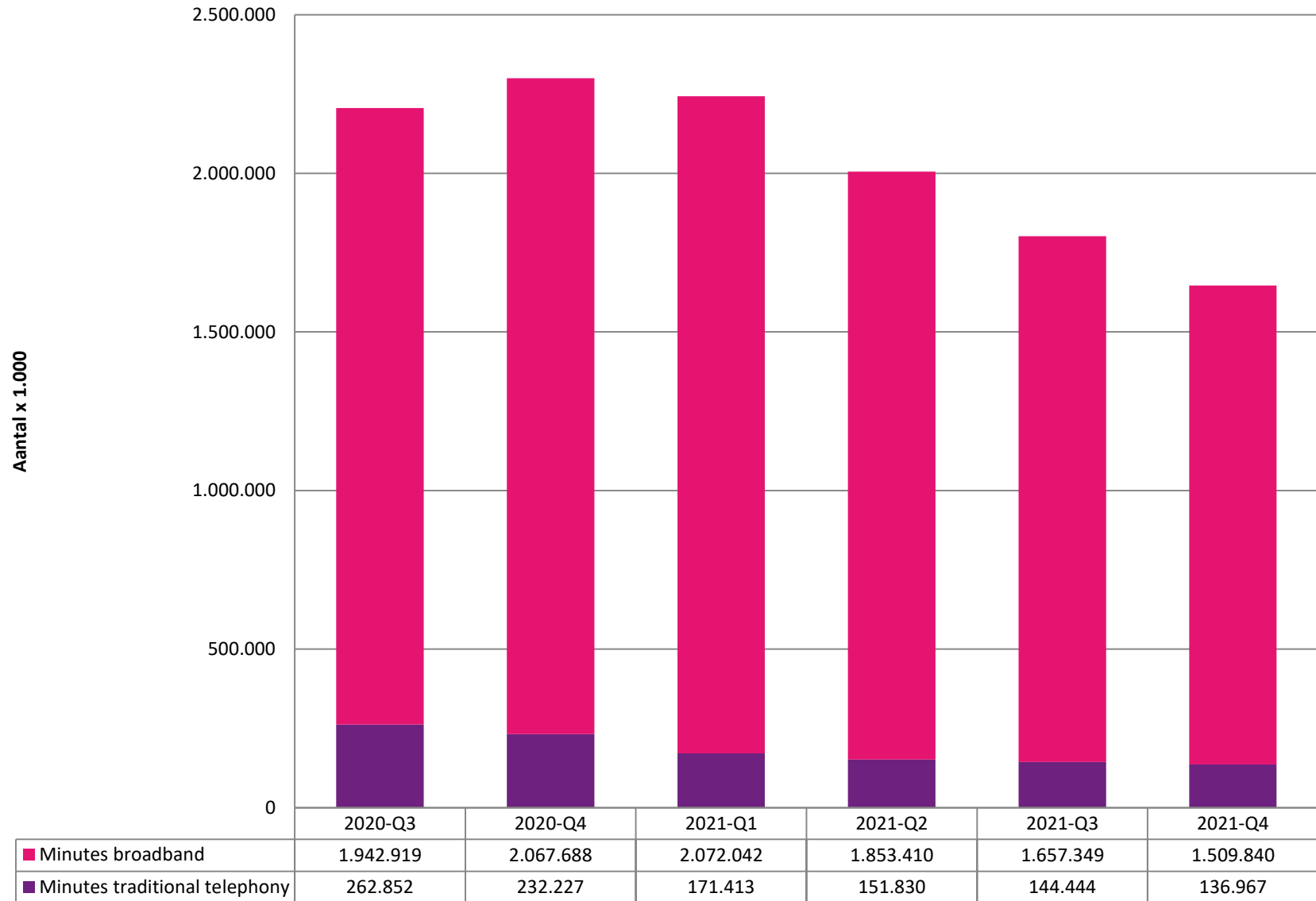


	2020-Q3	2020-Q4	2021-Q1	2021-Q2	2021-Q3	2021-Q4
KPN	[60 - 65%]	[60 - 65%]	[60 - 65%]	[60 - 65%]	[60 - 65%]	[60 - 65%]
VodafoneZiggo	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]
T-Mobile	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
Other	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]

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

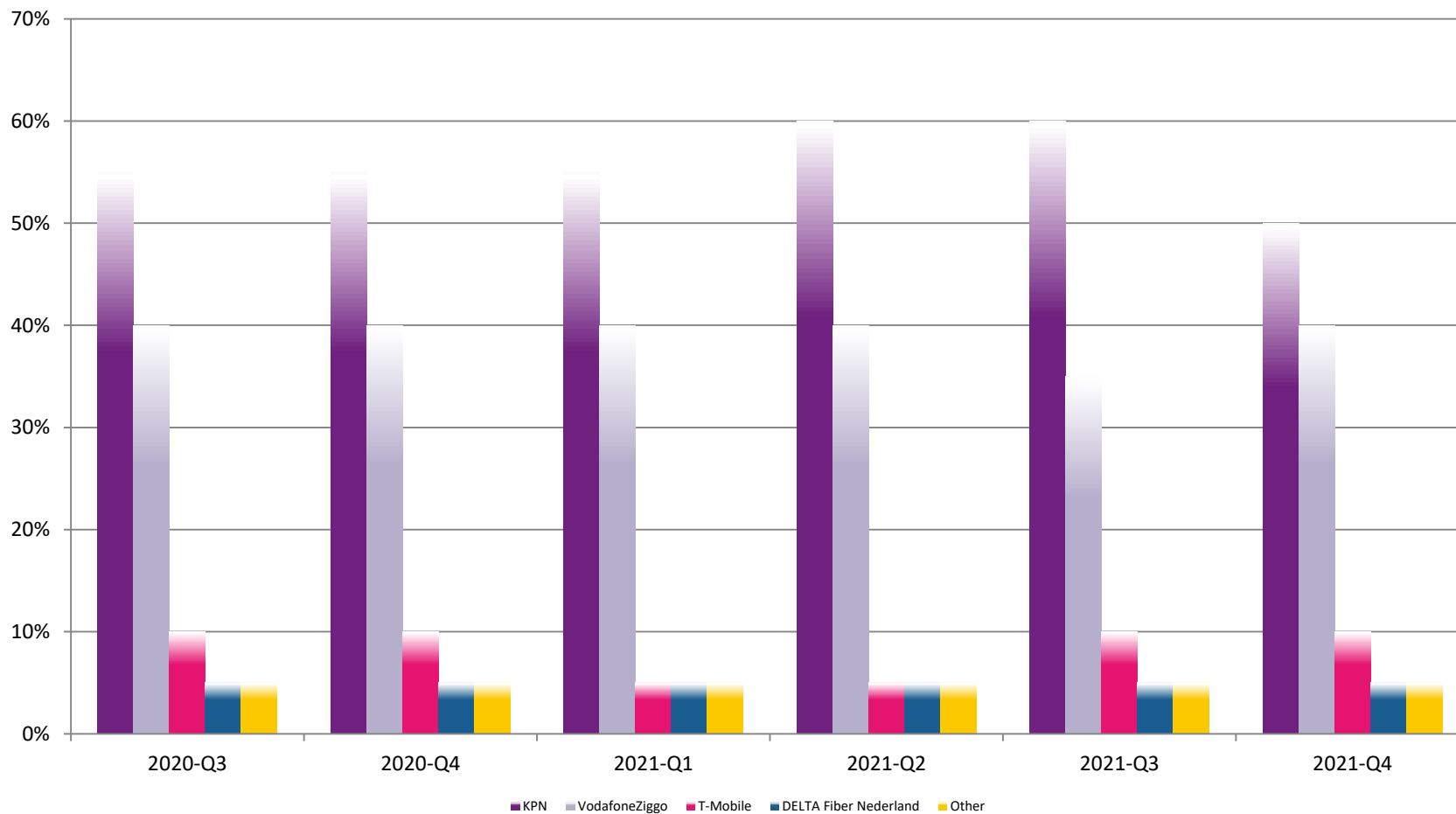
Retail volume based on voice minutes



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

Fixed telephony

Retail market share based on voice minutes



	2020-Q3	2020-Q4	2021-Q1	2021-Q2	2021-Q3	2021-Q4
KPN	[50 - 55%]	[50 - 55%]	[50 - 55%]	[55 - 60%]	[55 - 60%]	[45 - 50%]
VodafoneZiggo	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[30 - 35%]	[35 - 40%]
T-Mobile	[5 - 10%]	[5 - 10%]	[0 - 5%]	[0 - 5%]	[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_A4_2_1-2-3-4 van de Telecommonitor

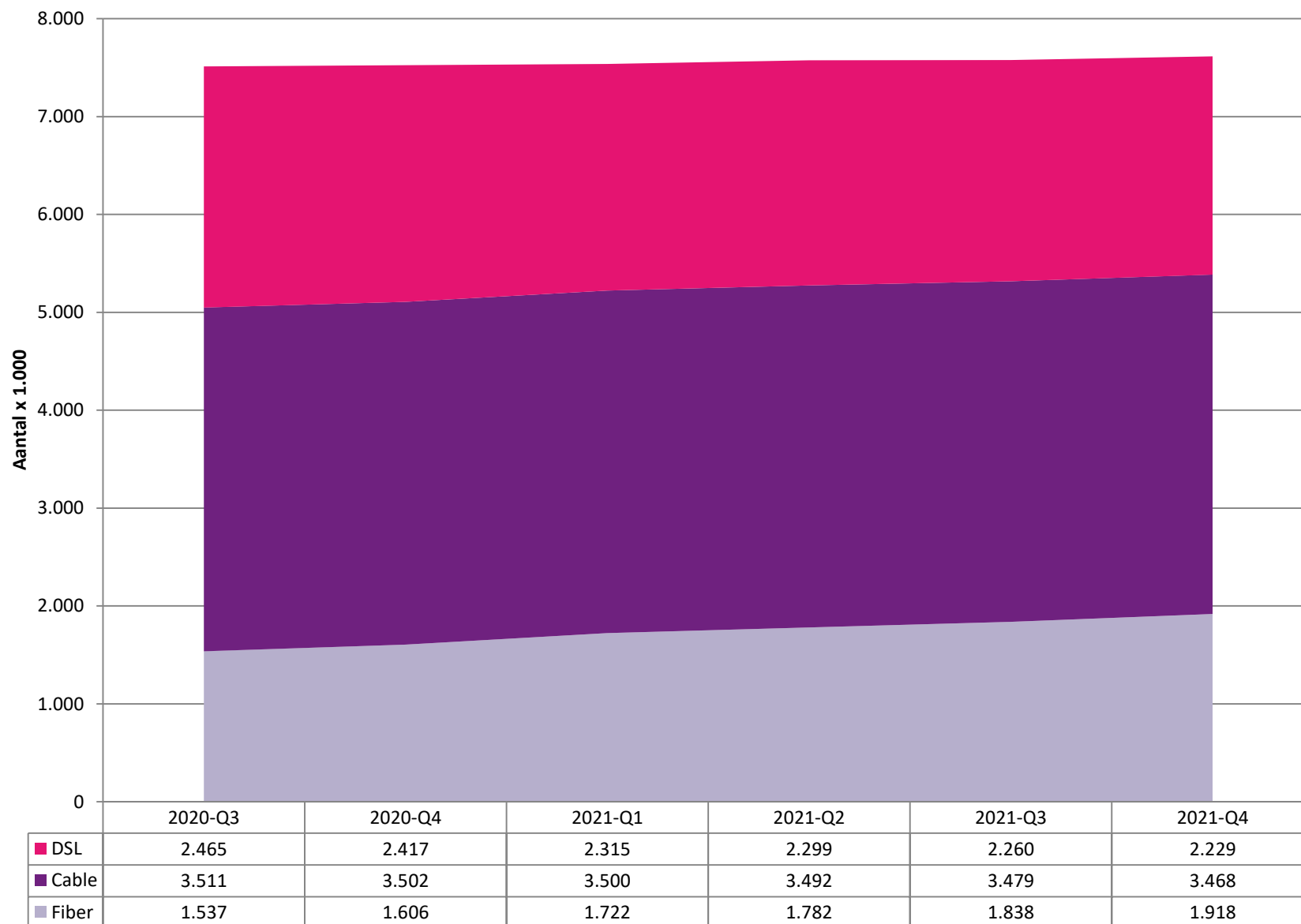
Fixed telephony

Retail turnover per type of traffic



Broadband

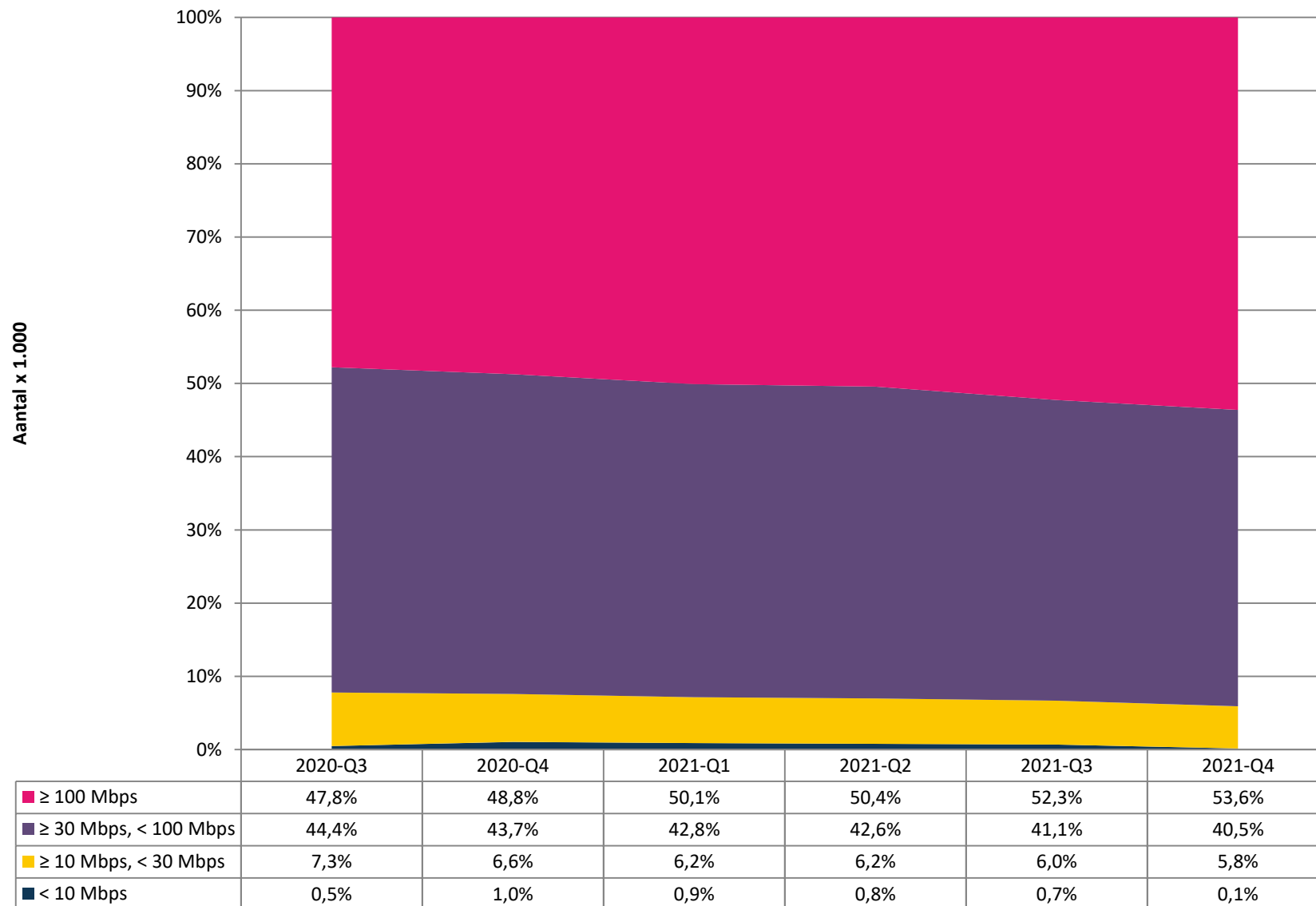
Retail connections per type



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. Glasvezel = breedbandinternet op basis van glasvezel ODF toegang (FtH + FtO)

Broadband

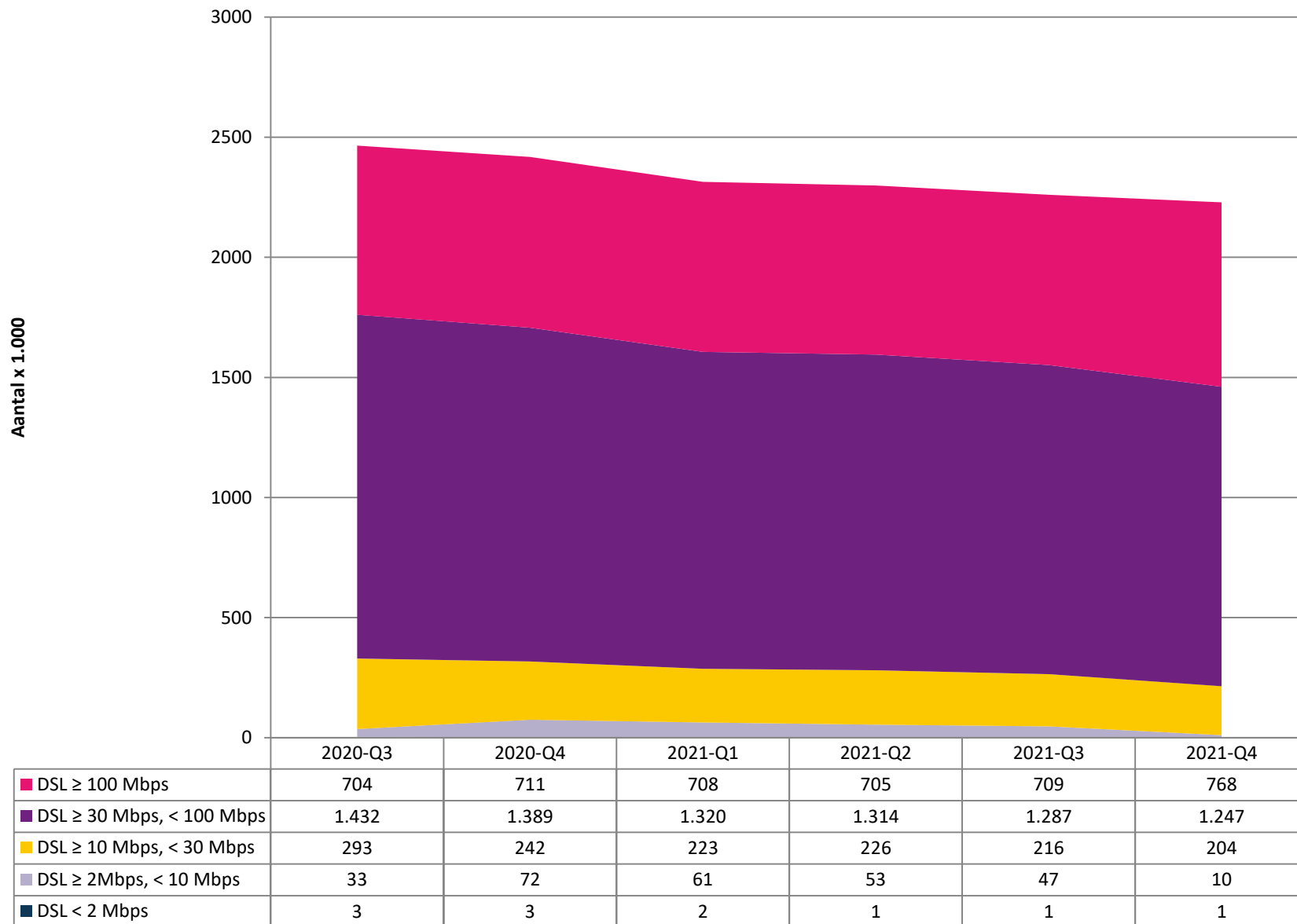
Percentage retail connections by speed



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

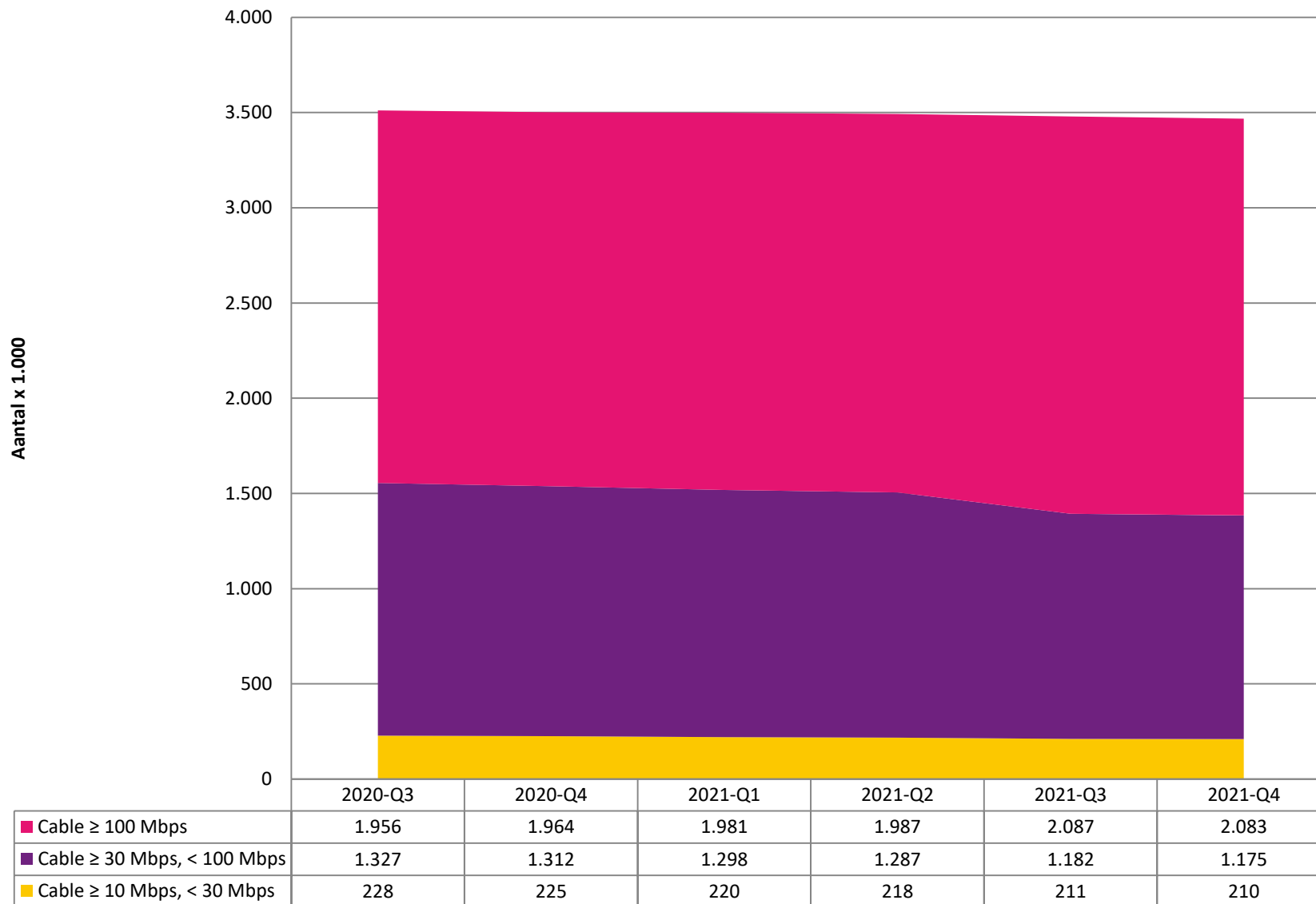
Retail DSL-connections by speed



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

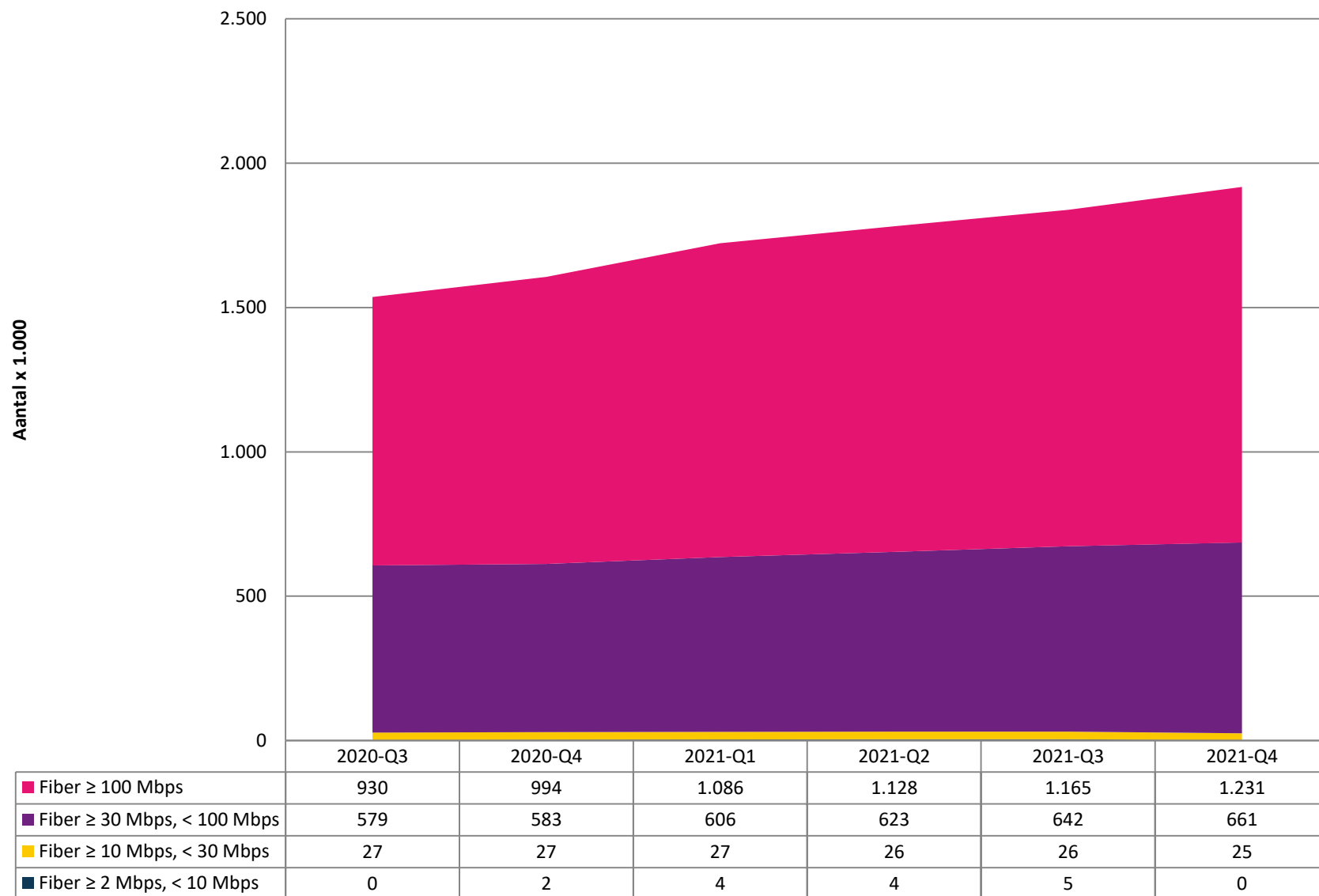
Retail cable connections by speed



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

Broadband

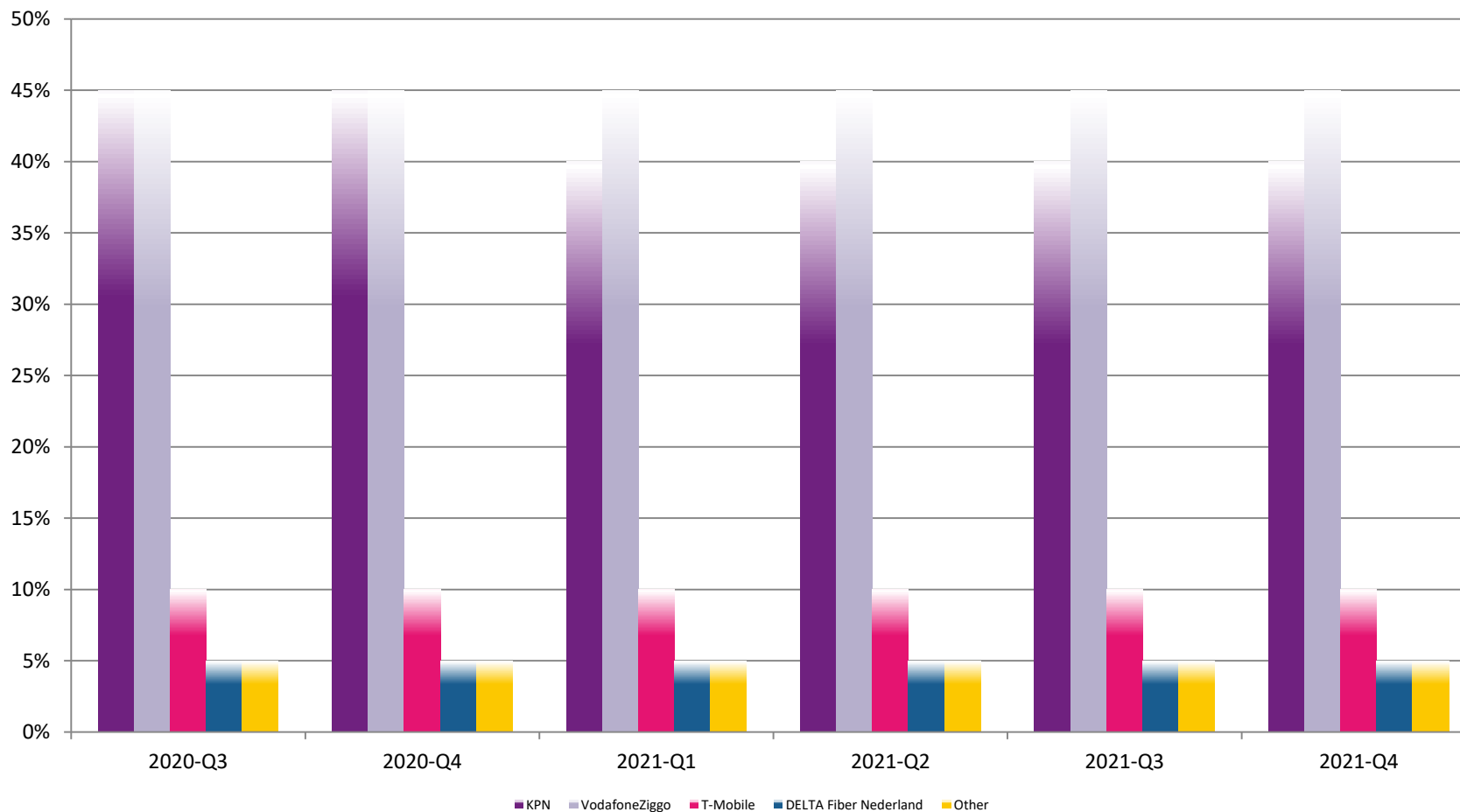
Retail fiber-optic connections by speed



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

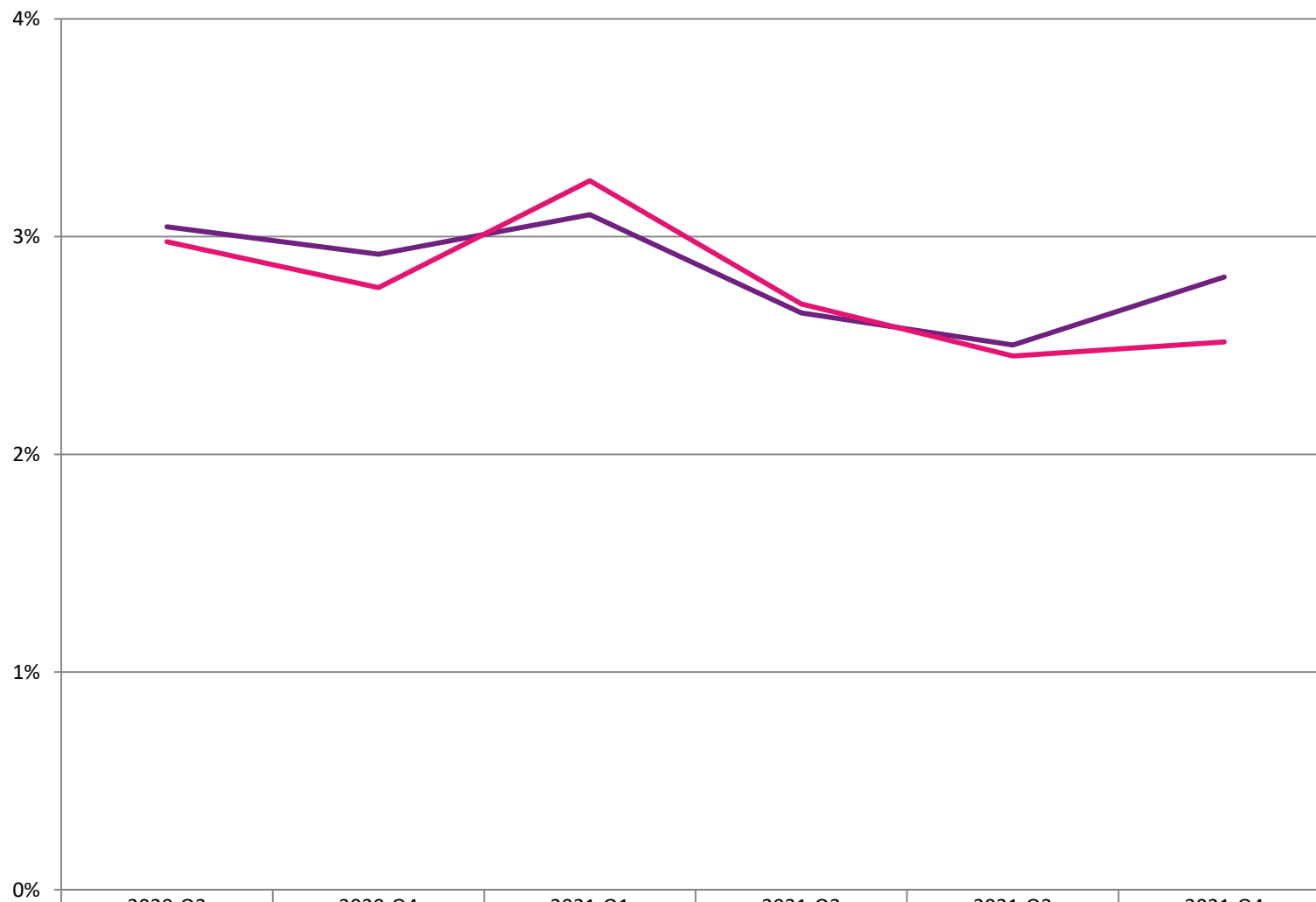


	2020-Q3	2020-Q4	2021-Q1	2021-Q2	2021-Q3	2021-Q4
KPN	[40 - 45%]	[40 - 45%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]
VodafoneZiggo	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 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 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

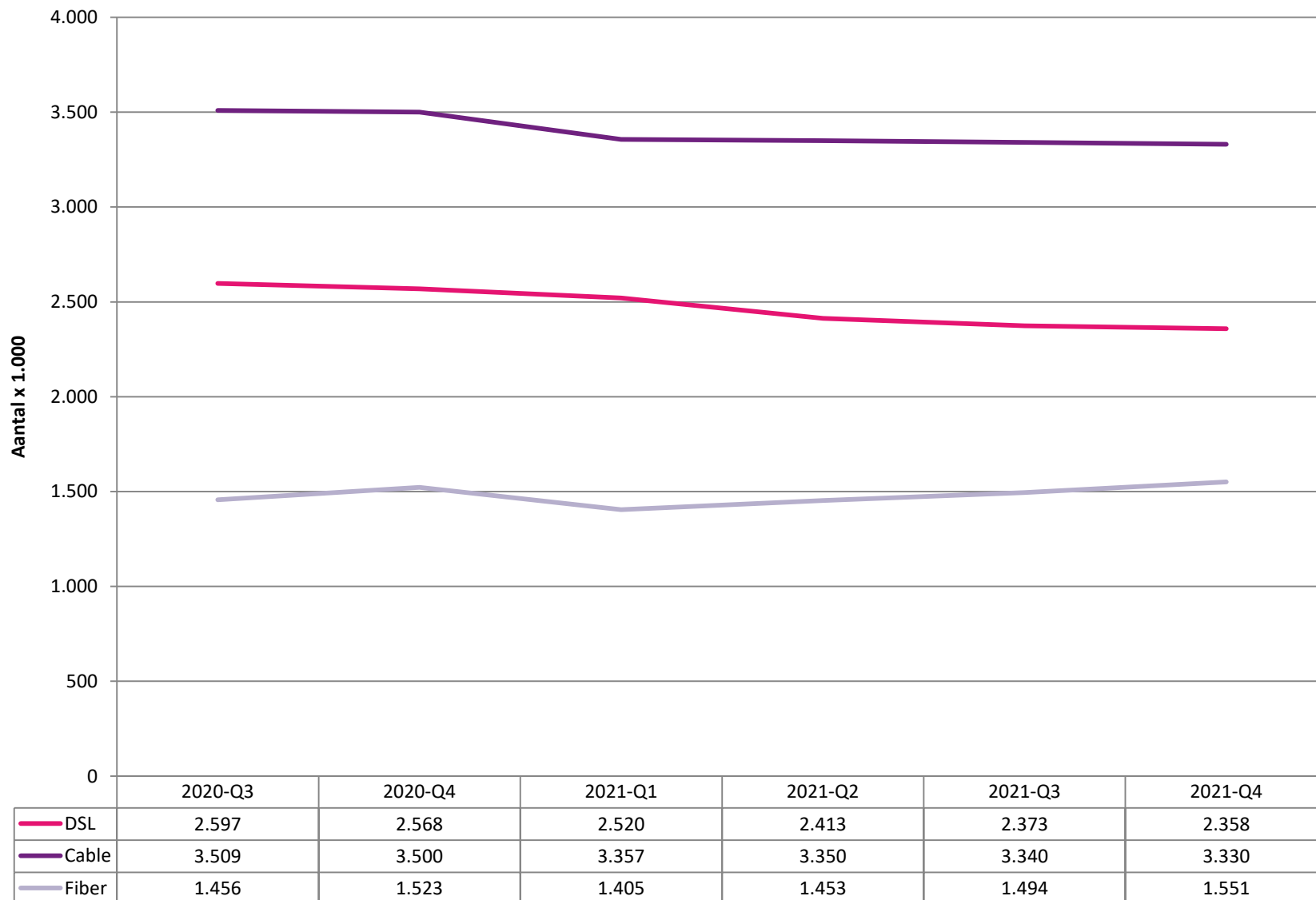
Retail churn based on connections



Op basis van vragen 30_A5_1_1-2, 30_A5_2_1-2, 30_A5_3_1-2, en 30_A5_4_1-2 van de Telecommonitor

Broadband

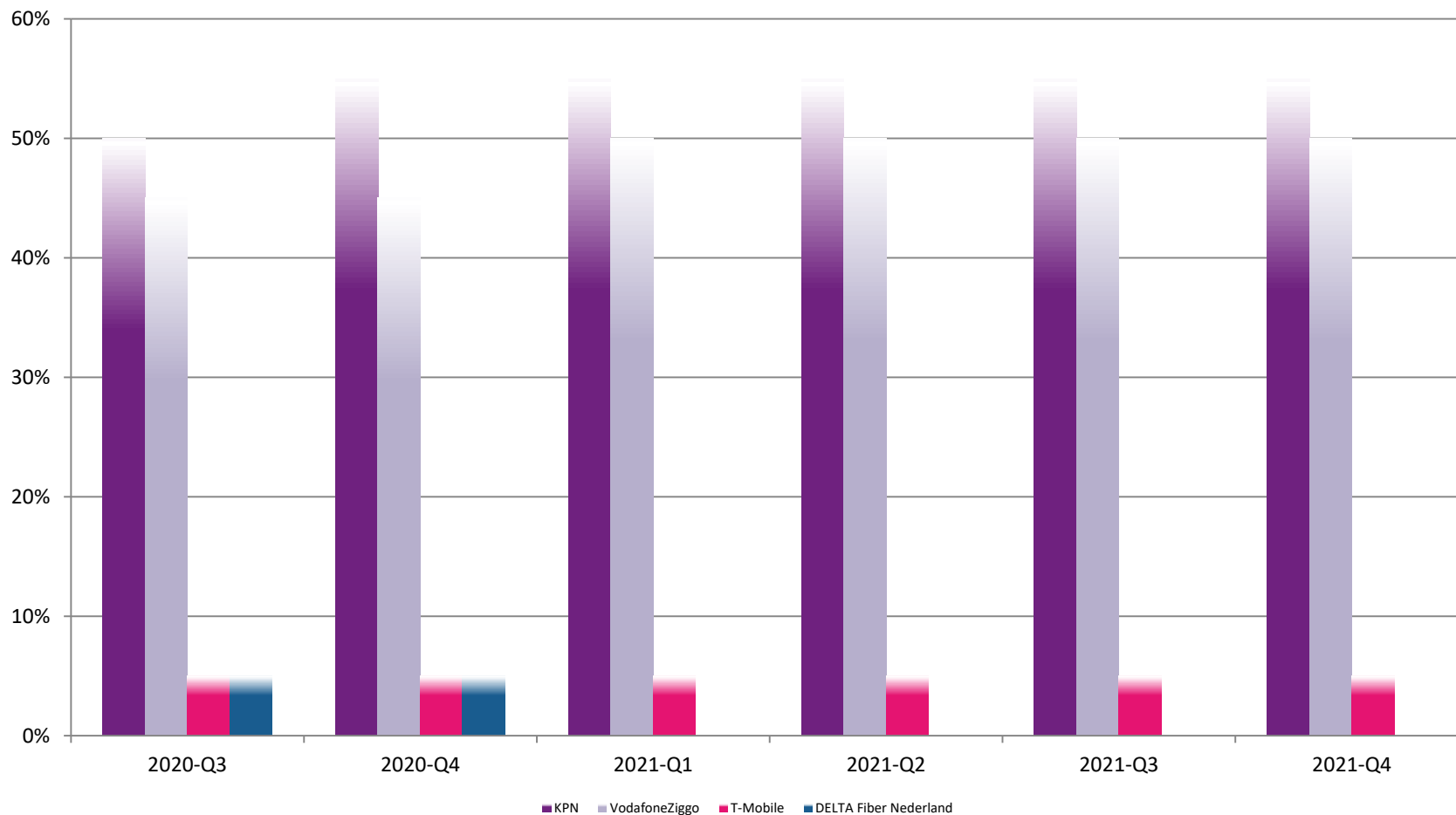
Low-quality WBT-connections



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

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

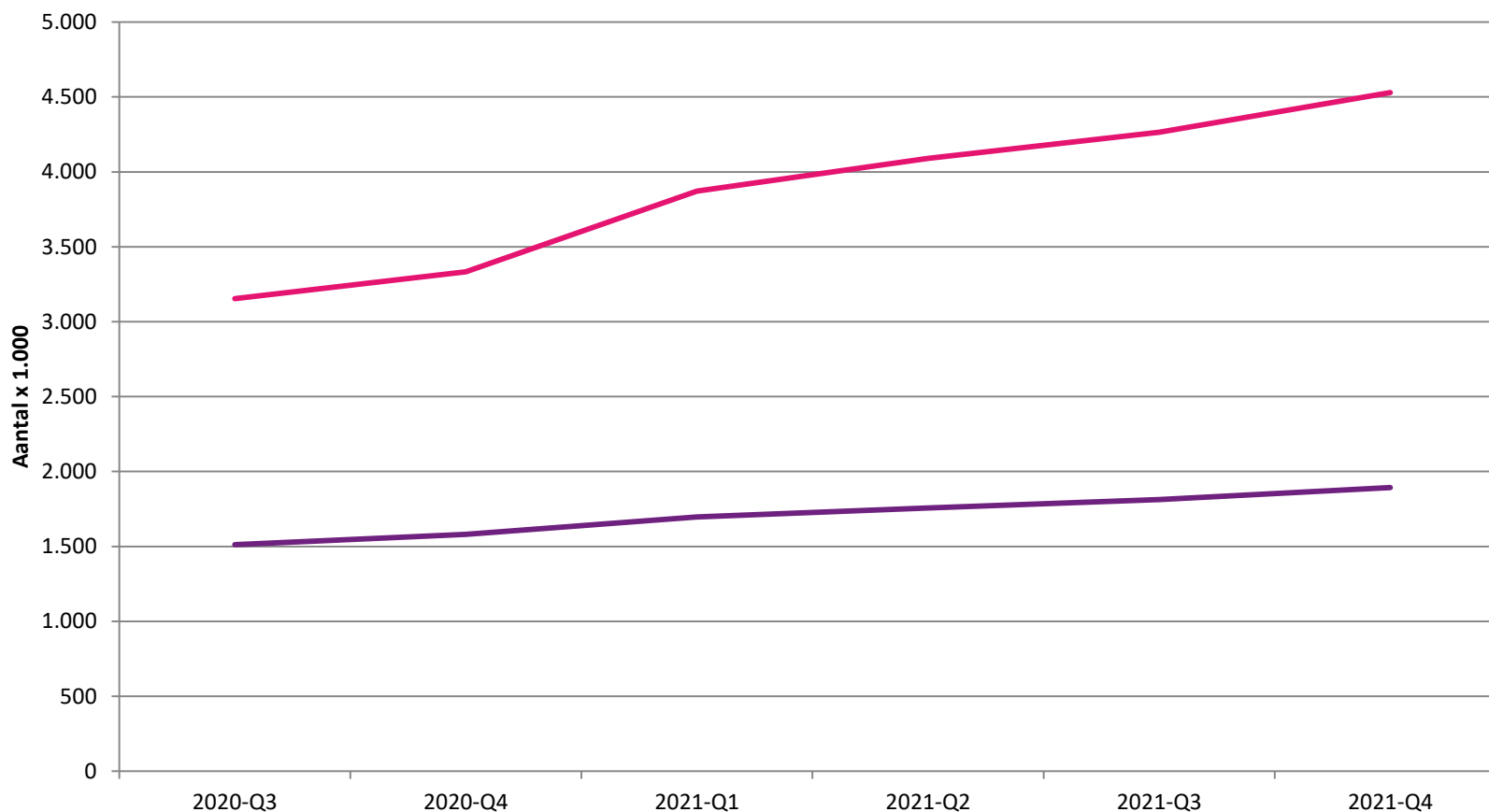


	2020-Q3	2020-Q4	2021-Q1	2021-Q2	2021-Q3	2021-Q4
■ Unbundled Local Loop Fiber (FttH)	109	117	126	135	146	165,77
■ (Virtual) Unbundles Local Loop Copper	275	268	242	228	219	206,1
■ Purchase of active fiber optic connections (FttH)	133	148	161	166	167	180
■ Purchase of active copper connections	370	387	410	416	427	435

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

Broadband

Homes passed and activated (FttH)



	2020-Q3	2020-Q4	2021-Q1	2021-Q2	2021-Q3	2021-Q4
— Homes passed fiber (FttH)	3.154	3.333	3.871*	4.090*	4.264*	4.529*
— Homes activated fiber (FttH)	1.512	1.581	1.698*	1.757*	1.814*	1.893*

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 bevroegde marktpartijen.

* Inclusief aansluitingen van kleine/regionale glasvezelaanbieders.

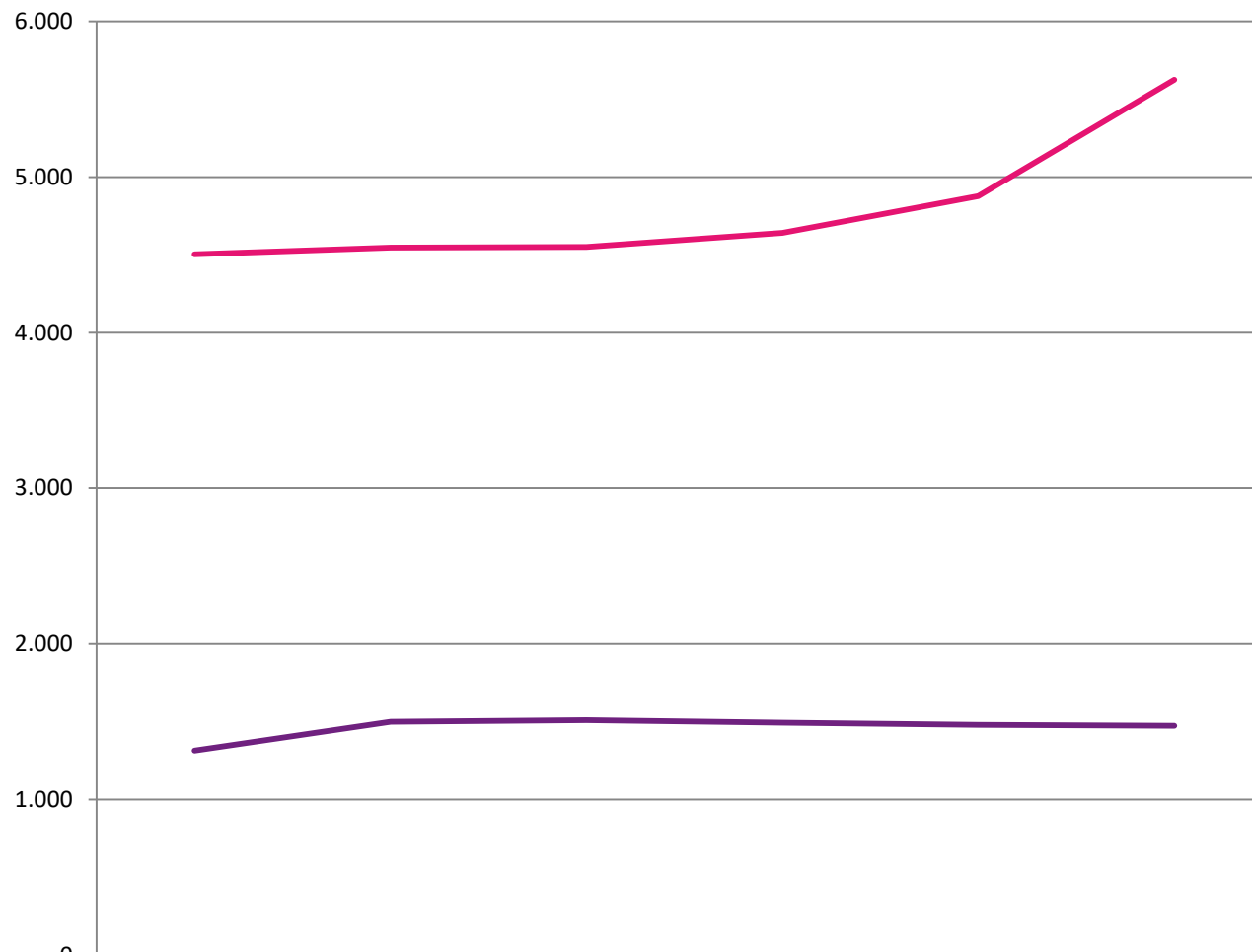
Op basis van vragen 0_A3_1_4 en 30_A1_4_1-2-3-4-5 van de Telecommontitor

Broadband

Homes connected to upgraded copper



Aantal x 1.000

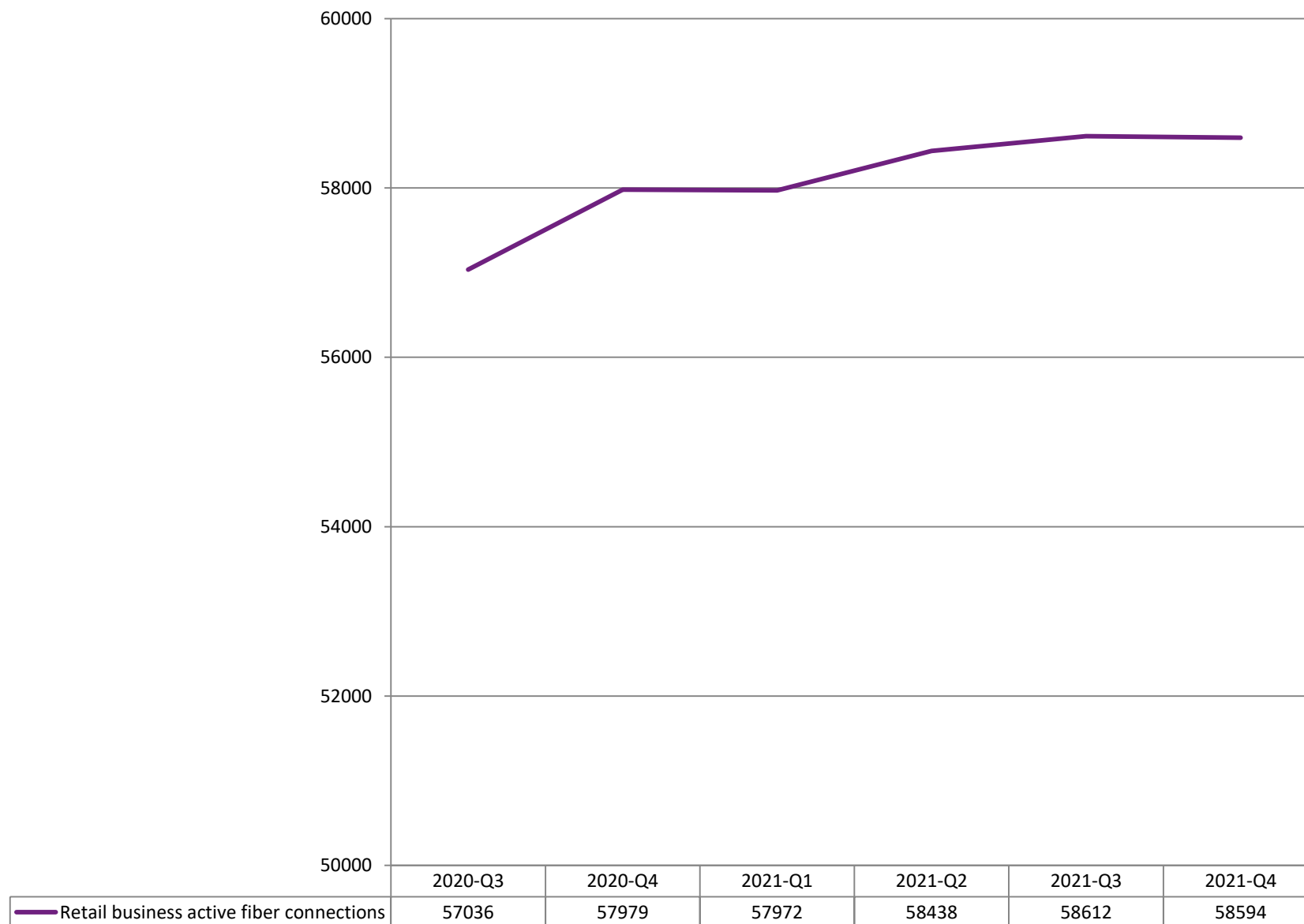


	2020-Q3	2020-Q4	2021-Q1	2021-Q2	2021-Q3	2021-Q4
Homes connected upgraded copper	4.503	4.547	4.551	4.641	4.878	5.624
Homes activated upgraded copper	1.315	1.499	1.511	1.494	1.480	1.474

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

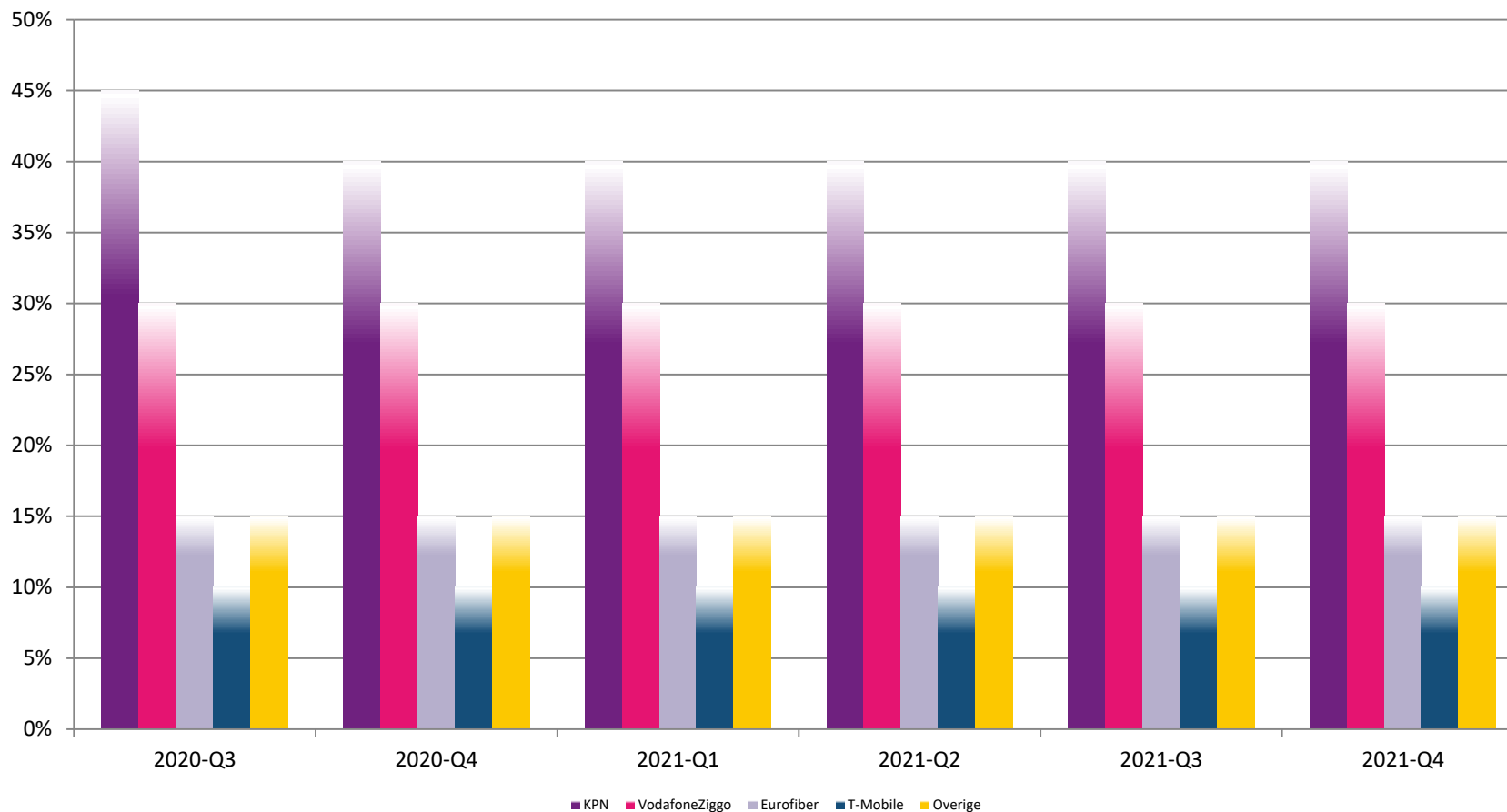
Retail business fiber-optic connections



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

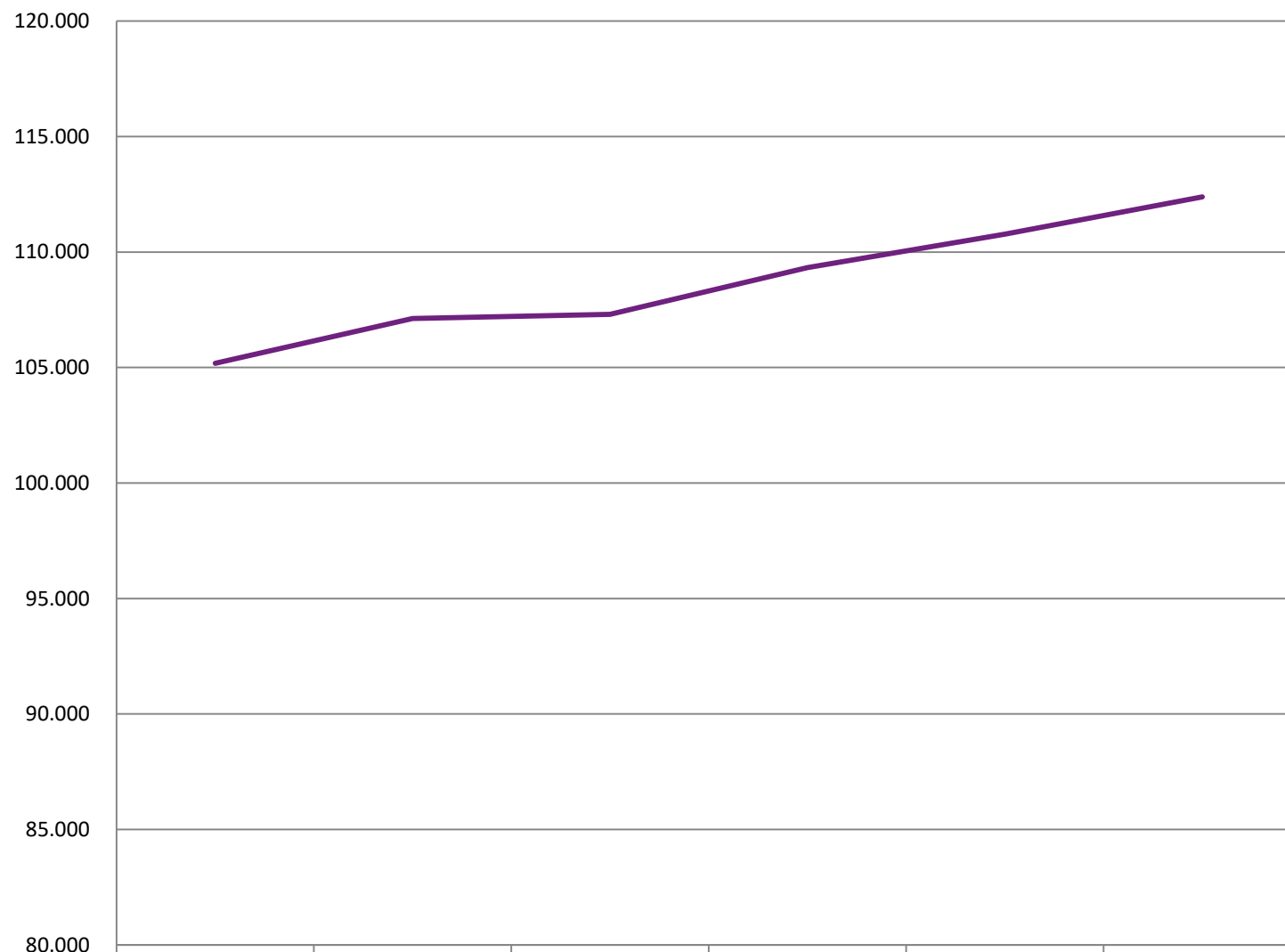


	2020-Q3	2020-Q4	2021-Q1	2021-Q2	2021-Q3	2021-Q4
KPN	[40 - 45%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]
VodafoneZiggo	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
Eurofiber	[10 - 15%]	[10 - 15%]	[10 - 15%]	[10 - 15%]	[10 - 15%]	[10 - 15%]
T-Mobile	[5 - 10%]	[5 - 10%]	[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

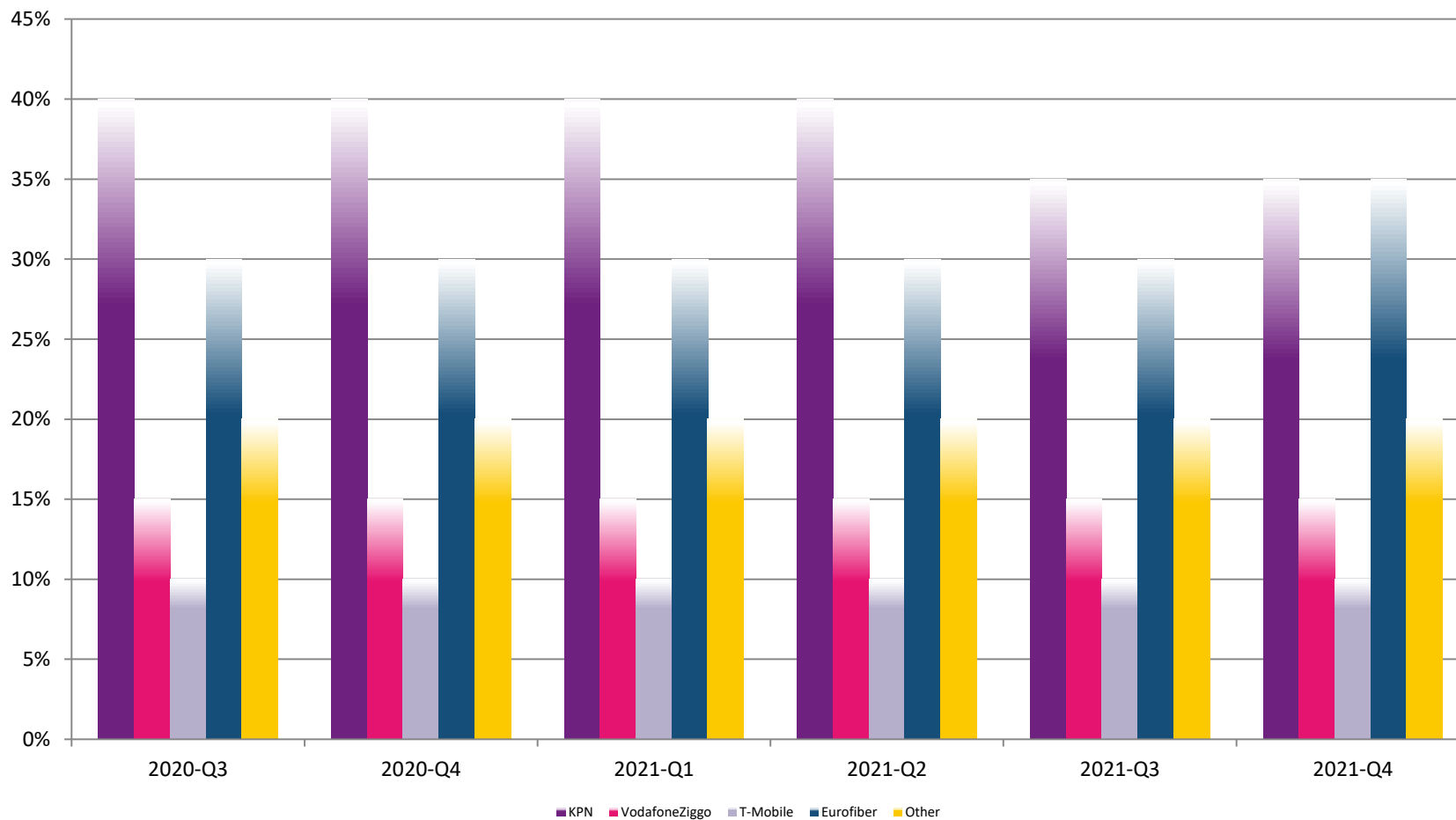
Wholesale business fiber-optic connections



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-Q3	2020-Q4	2021-Q1	2021-Q2	2021-Q3	2021-Q4
KPN	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[30 - 35%]	[30 - 35%]
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%]	[30 - 35%]
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 Telecommunitor. *Marktaandeel kleine en regionale marktpartijen zijn geschat op 10% (zie marktanalyse ODF-Access (FttO))

Business network services

Wholesale HWT and leased lines



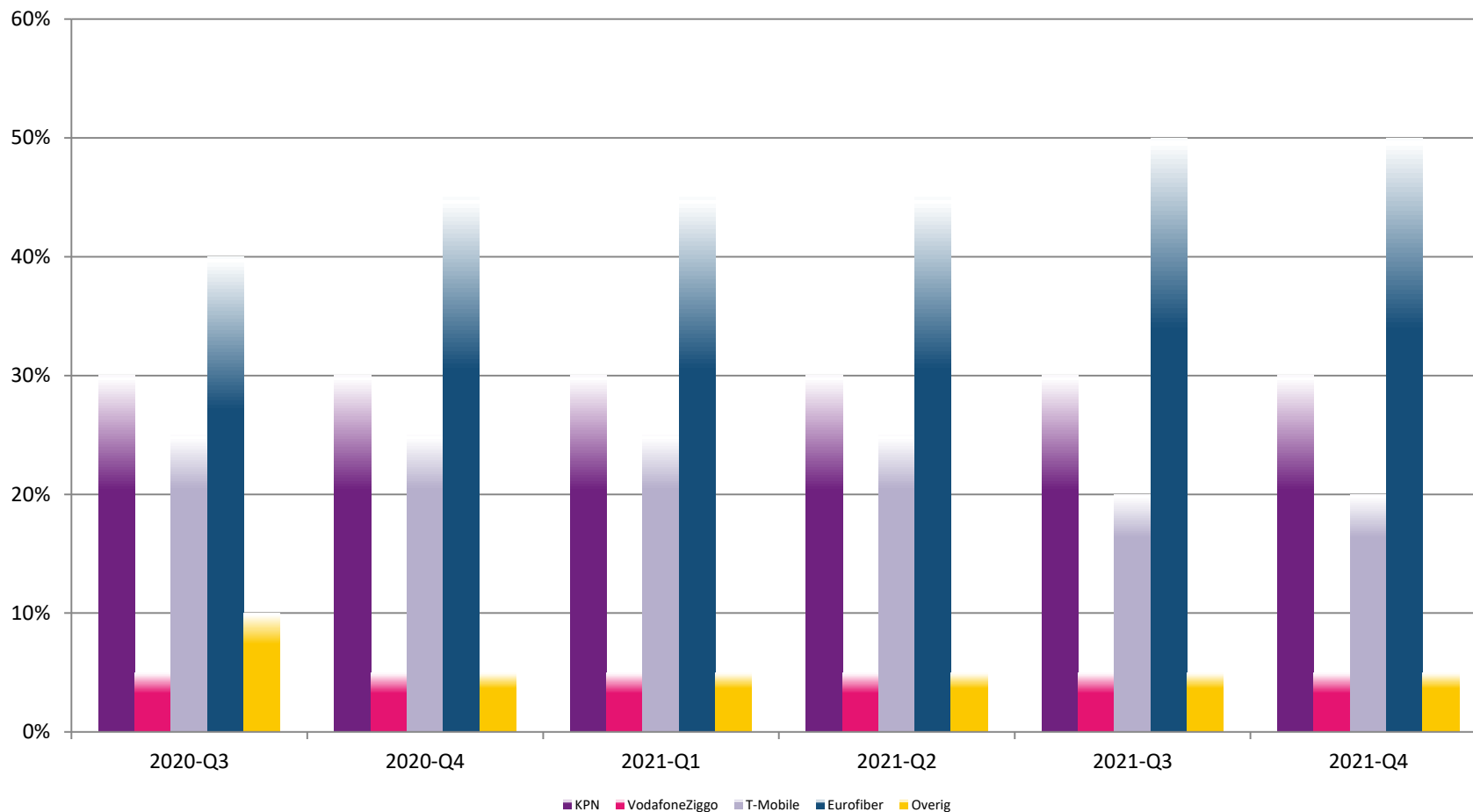
Aansluitingen



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.

Business network services

Wholesale market share of HWT and leased lines

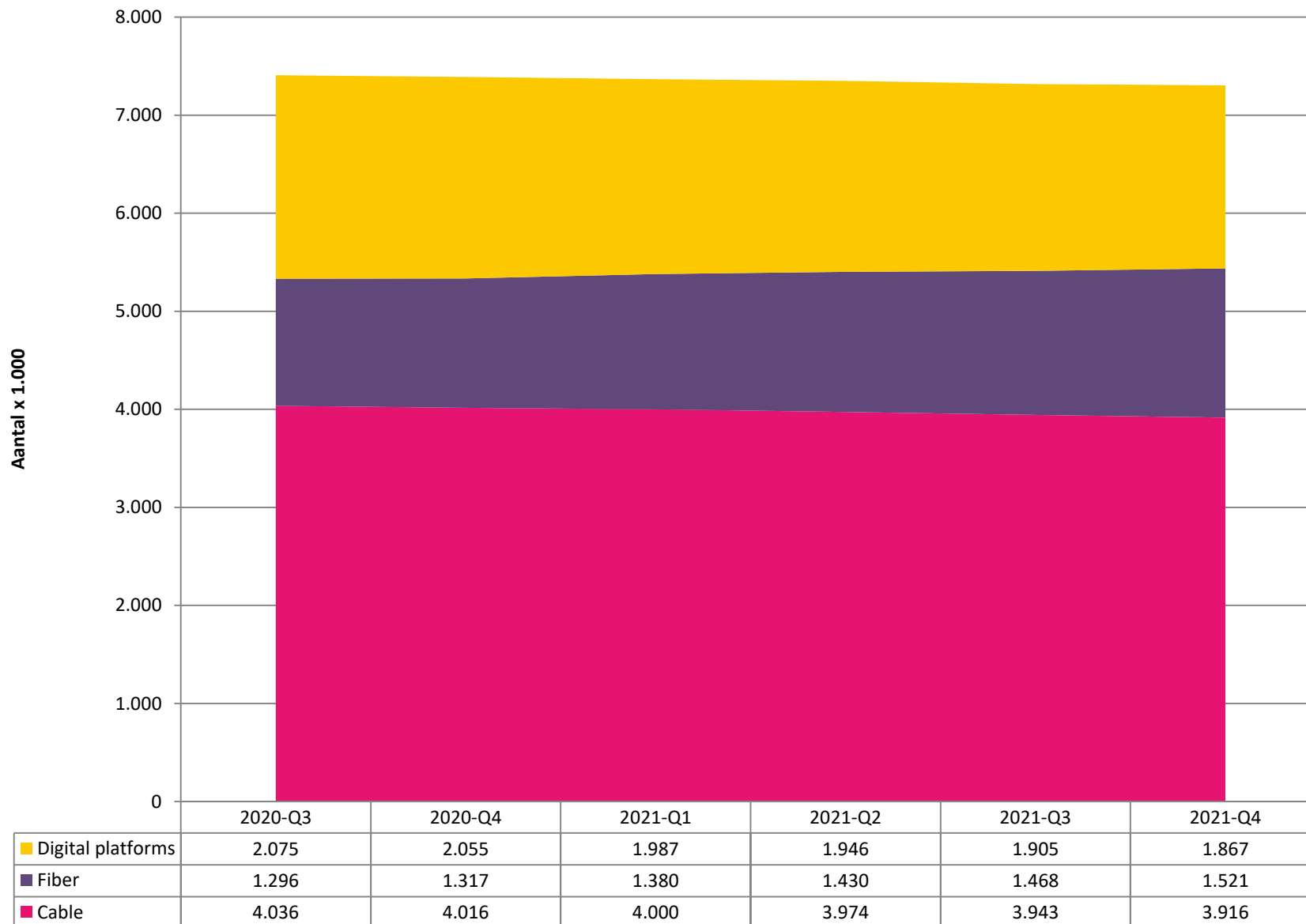


	2020-Q3	2020-Q4	2021-Q1	2021-Q2	2021-Q3	2021-Q4
KPN	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
VodafoneZiggo	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
T-Mobile	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[15 - 20%]	[15 - 20%]
Eurofiber	[35 - 40%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[45 - 50%]	[45 - 50%]
Other	[5 - 10%]	[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.

Television

Retail subscriptions per connection type

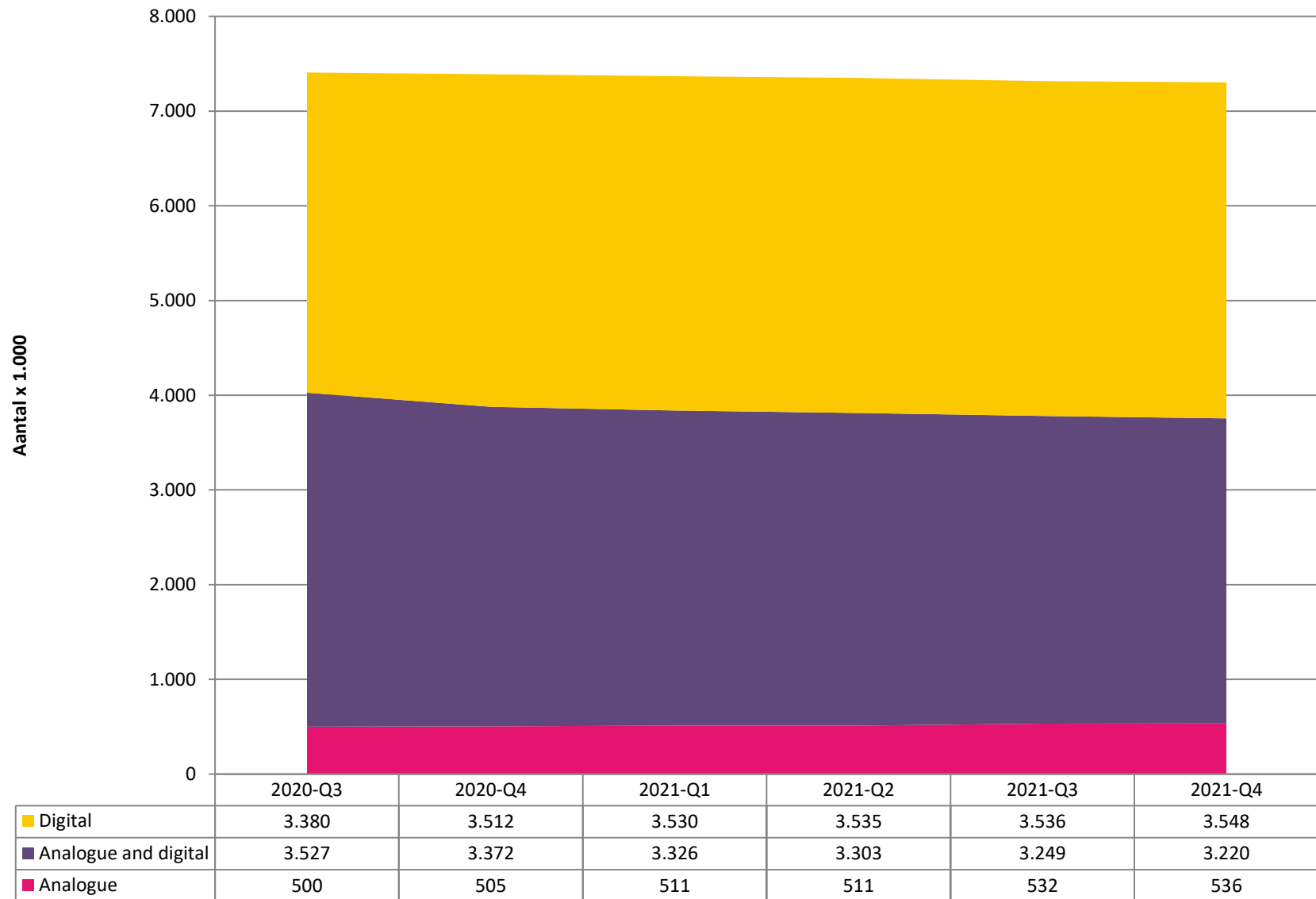


Op basis van vragen 40_A1_1_1-2-3, 40_A1_2_1-2, 40_A1_3_1-2-3, en 40_A1_4_1-2-3-4 van de Telecommonitor

Digitale platforms zijn bijvoorbeeld DSL, Digtienne en Satelliet.

Television

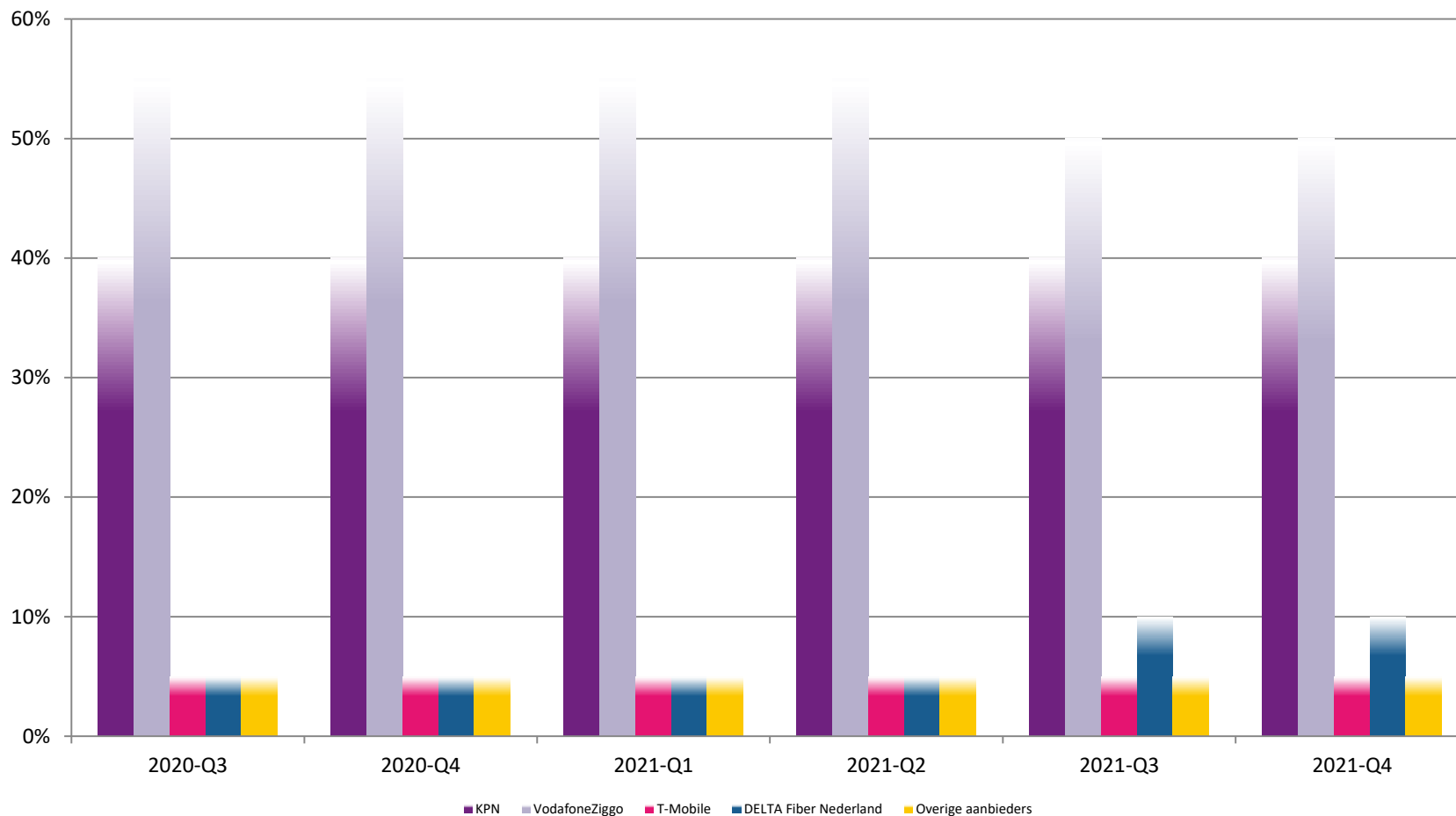
Digitalization of television subscriptions



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

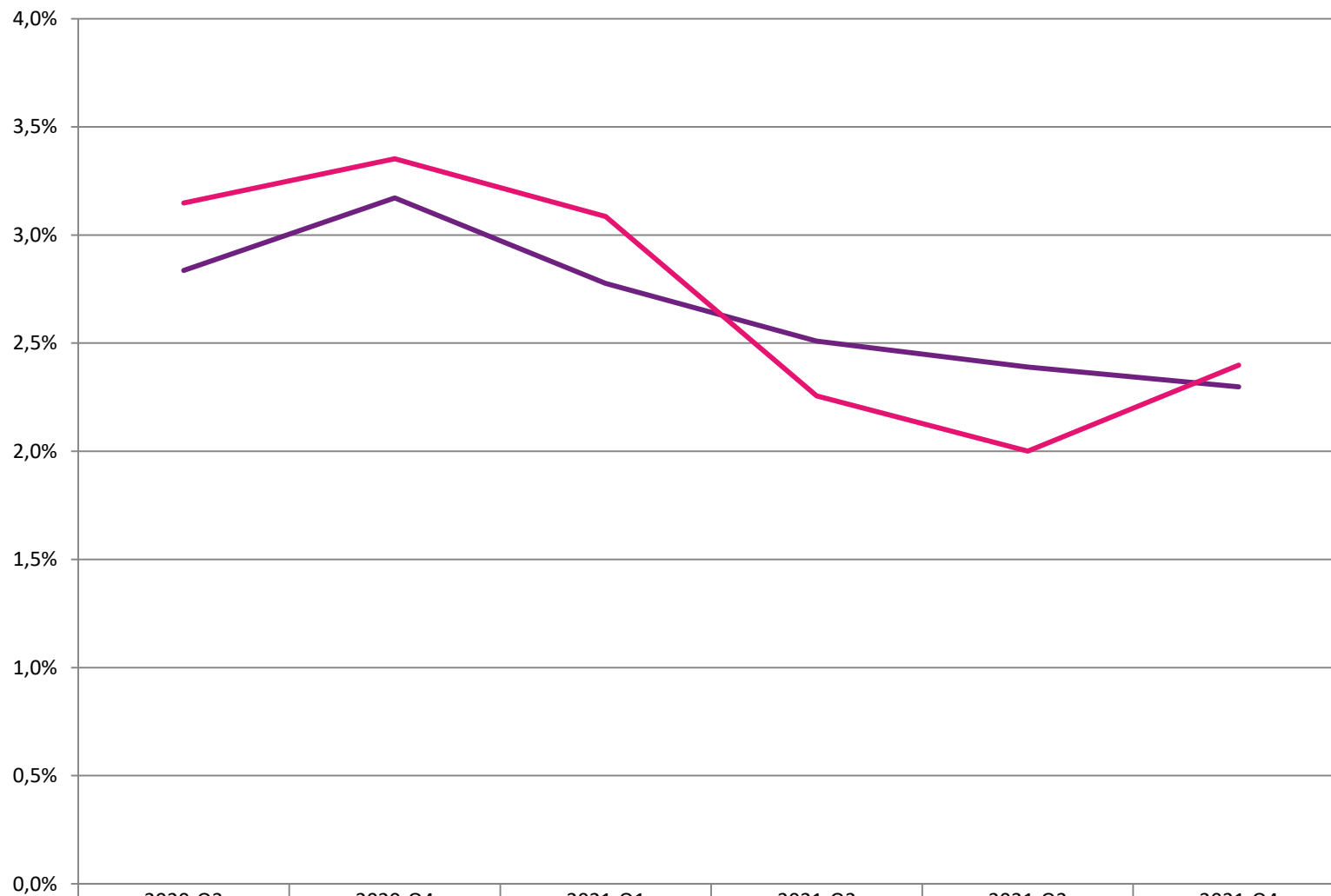


	2020-Q3	2020-Q4	2021-Q1	2021-Q2	2021-Q3	2021-Q4
KPN	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]
VodafoneZiggo	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[45 - 50%]	[45 - 50%]
T-Mobile	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[5 - 10%]	[5 - 10%]
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

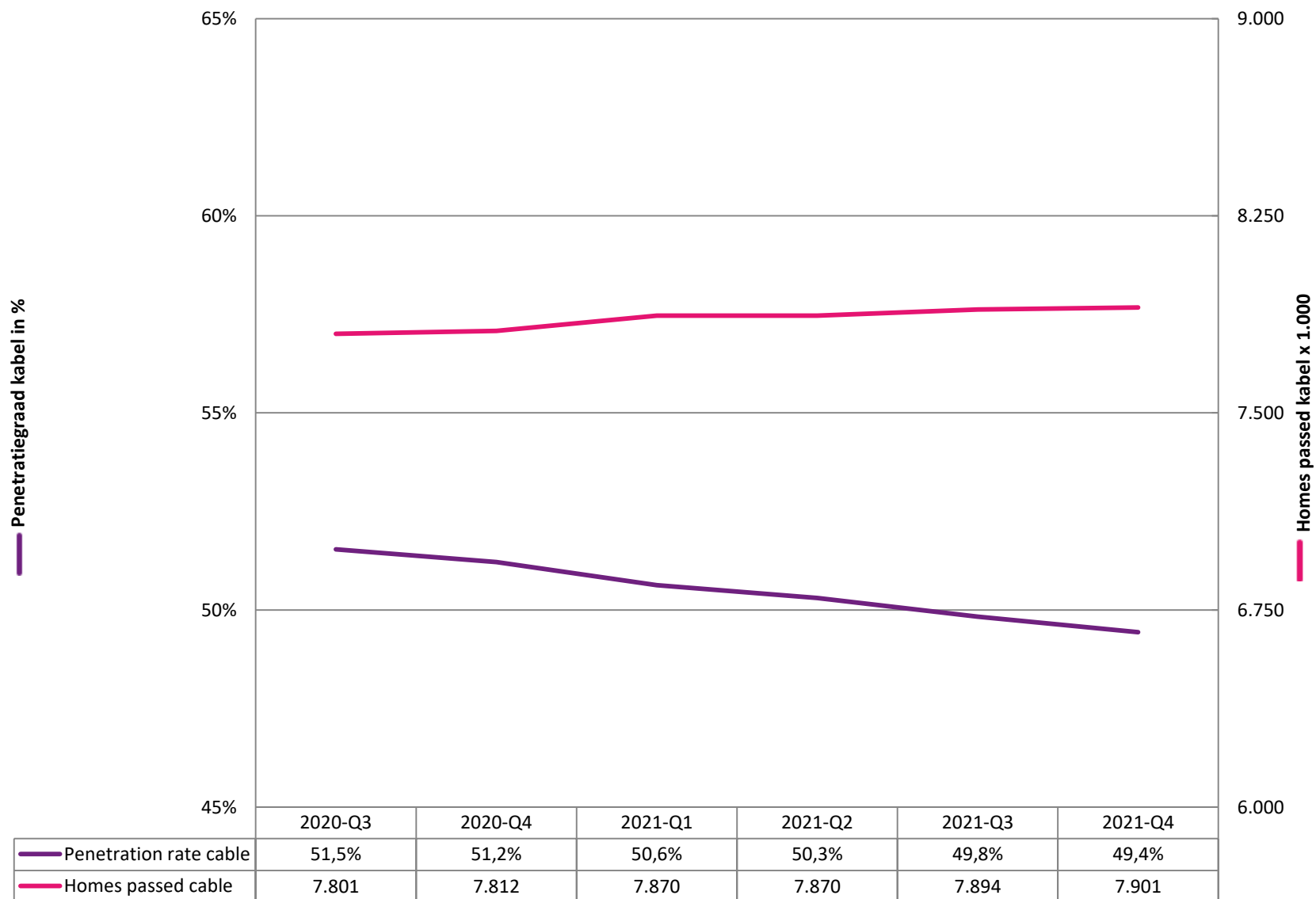
Retail turnover of radio/tv subscriptions



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

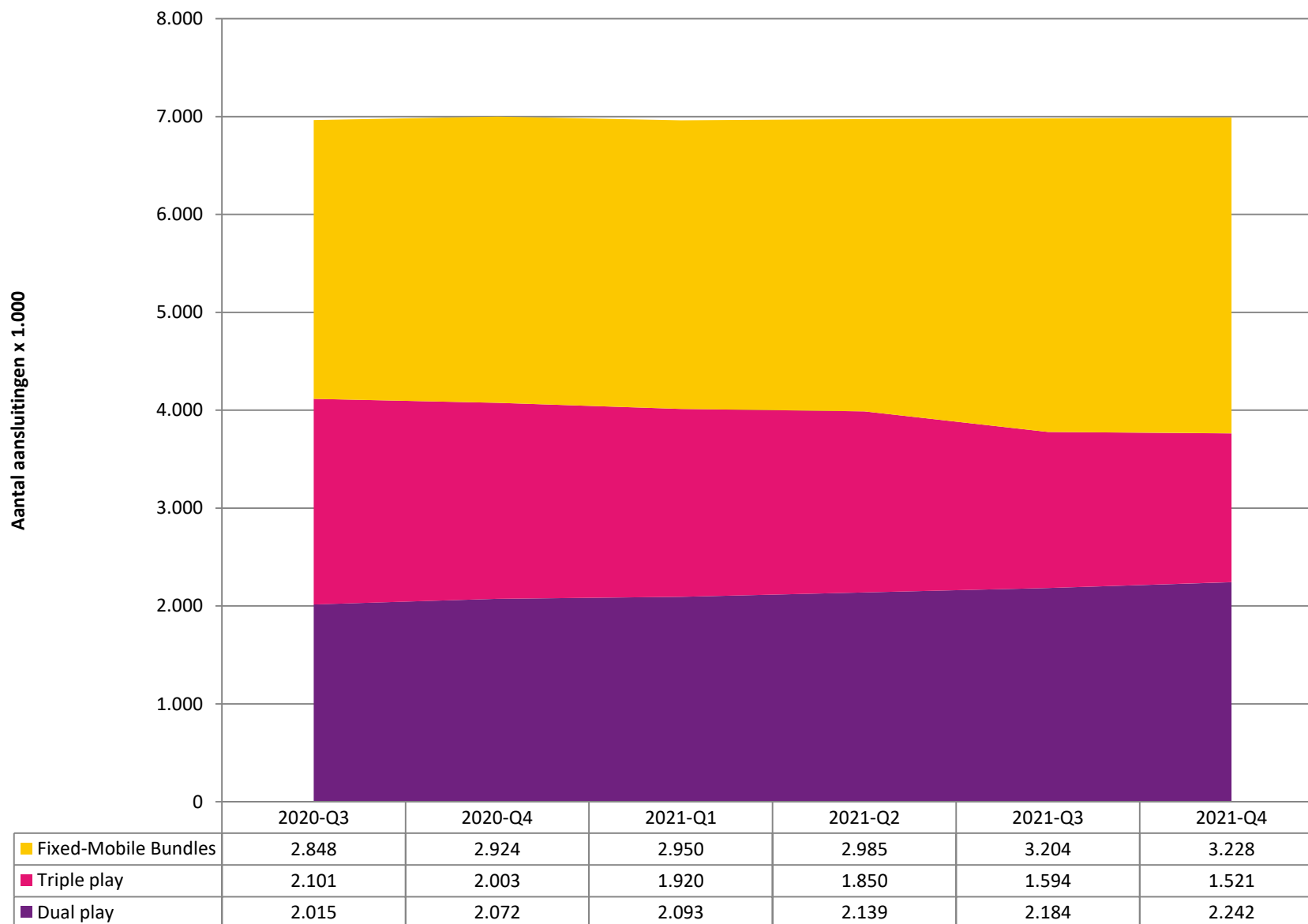
Homes passed and cable penetration level



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



	2020-Q3	2020-Q4	2021-Q1	2021-Q2	2021-Q3	2021-Q4
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%]	[10 - 15%]	[10 - 15%]	[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-Q3	2020-Q4	2021-Q1	2021-Q2	2021-Q3	2021-Q4
KPN	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[40 - 45%]	[40 - 45%]
VodafoneZiggo	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[45 - 50%]	[45 - 50%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[10 - 15%]	[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-Q3	2020-Q4	2021-Q1	2021-Q2	2021-Q3	2021-Q4
■ Broadband in Fixed-Mobile	26%	26%	26%	26%	28%	28%
■ Broadband in triple play	39%	38%	38%	37%	35%	34%
■ Broadband in dual play	28%	28%	29%	29%	30%	30%
■ Broadband only	7%	7%	8%	8%	8%	8%
— Breedband in vast-mobiel	38%	39%	39%	39%	42%	42%

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



	2020-Q3	2020-Q4	2021-Q1	2021-Q2	2021-Q3	2021-Q4
TV in Fixed-Mobile	25%	26%	26%	26%	28%	28%
TV in triple play	37%	37%	36%	36%	34%	33%
TV in dual play	22%	23%	24%	25%	26%	27%
TV only	15%	14%	14%	13%	13%	12%
TV in vast-mobiel	56%	58%	59%	60%	66%	67%

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-Q3	2020-Q4	2021-Q1	2021-Q2	2021-Q3	2021-Q4
Fixed telephony in Fixed-Mobile	37%	37%	38%	38%	42%	43%
Fixed telephony in triple play	42%	40%	39%	38%	34%	33%
Fixed telephony in dual play	6%	6%	6%	6%	6%	5%
Fixed telephony only	15%	17%	18%	18%	18%	18%
Vaste telefonie in vast-mobiel	47%	48%	49%	50%	55%	57%

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>Lomboxnet</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.

Autoriteit
Consument & Markt



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.
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