

## ***Netherlands: Broadband markets***

***The Netherlands has the highest fixed broadband take-up, and the second highest availability of Next Generation Access. In mobile broadband, 4th generation (LTE) is not yet available, but take-up of mobile broadband is higher than average.***

In 2012, standard fixed broadband covered more than 99.95% of homes in the Netherlands (95.5% in the EU). At the same time, Next Generation Access capable of providing at least 30 Mbps download was available to 98.4% of homes (53.8% in the EU).

In January 2013, the incumbent operator had a market share slightly below the European average (41.8% compared to 42.3% in the EU). 49.7% of all subscriptions were DSL connections (73.8% in the EU), while cable broadband connections accounted for 44.4% of the market (17.4% in the EU).

The take-up (subscriptions as a percentage of population) of fixed broadband was 40.2% in January 2013, the highest in the EU and 1.4 p.p. higher than in 2012. The share of high speed connections (at least 30 Mbps) was considerably higher than average (35% compared to 14.8% in the EU) and ultra-fast connections (at least 100 Mbps) accounted for 4.1% of all subscriptions (3.4% in the EU).

On the mobile side, third generation mobile broadband (HSPA) was available to 99% of population in 2012 (96.3% in the EU) and there was no 4th generation (LTE) availability. The take-up rate (subscriptions as a percentage of population) of mobile broadband was 61.5% in January 2013, above the average of 54.5% in the EU.