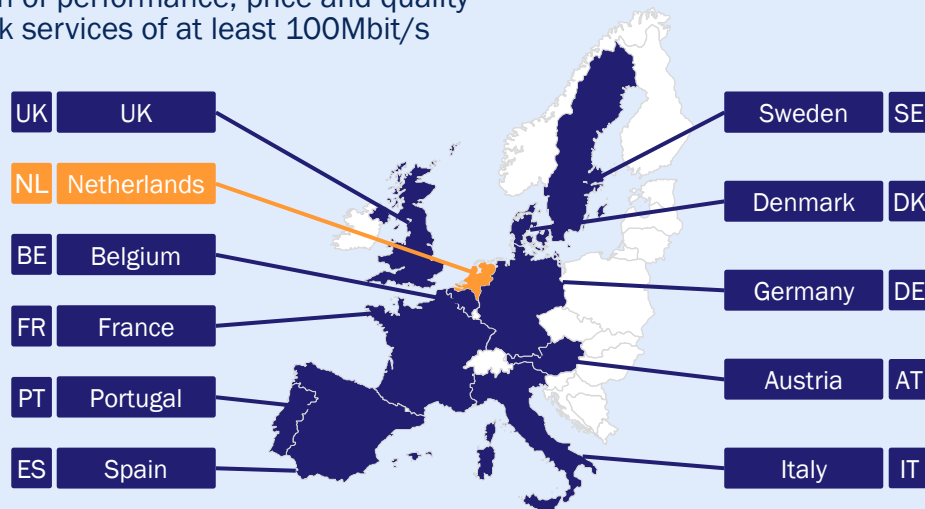
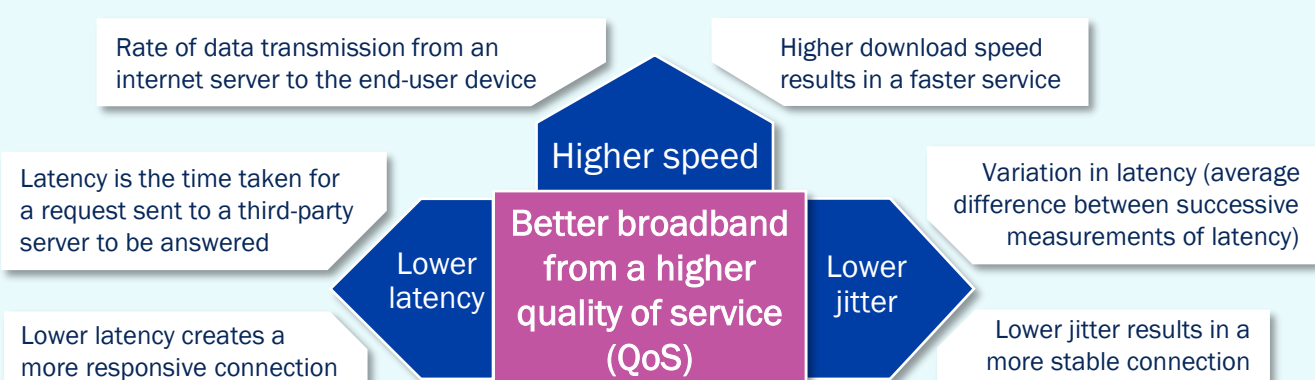


Dutch fixed networks are amongst the top performers of their European peers, with reasonable retail prices for high-speed internet services

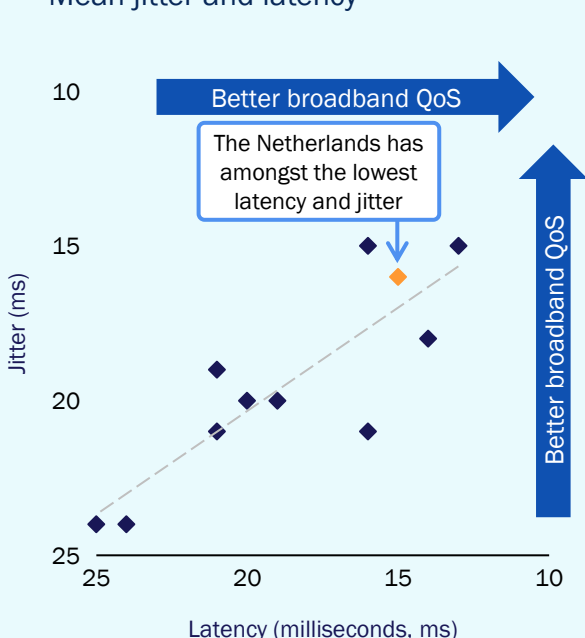
Our comparison of performance, price and quality of fixed network services of at least 100Mbit/s



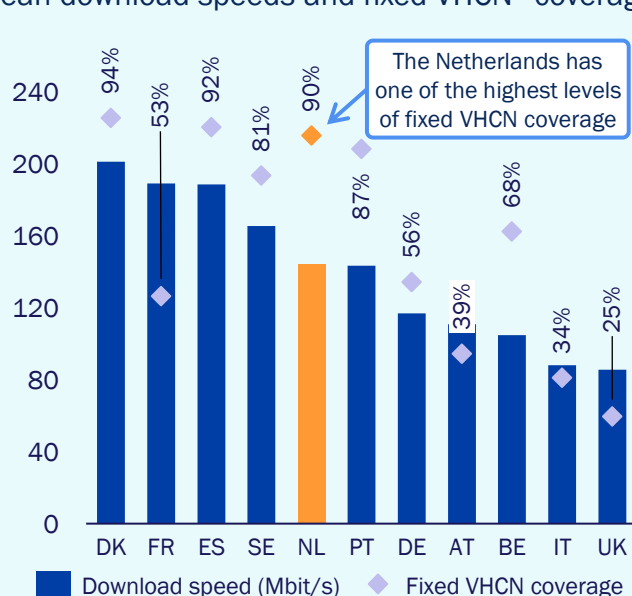
End-users in the Netherlands have access to responsive, stable broadband; average download speeds are high and likely to increase as take-up of FTTP¹ grows



Mean jitter and latency



Mean download speeds and fixed VHCN² coverage

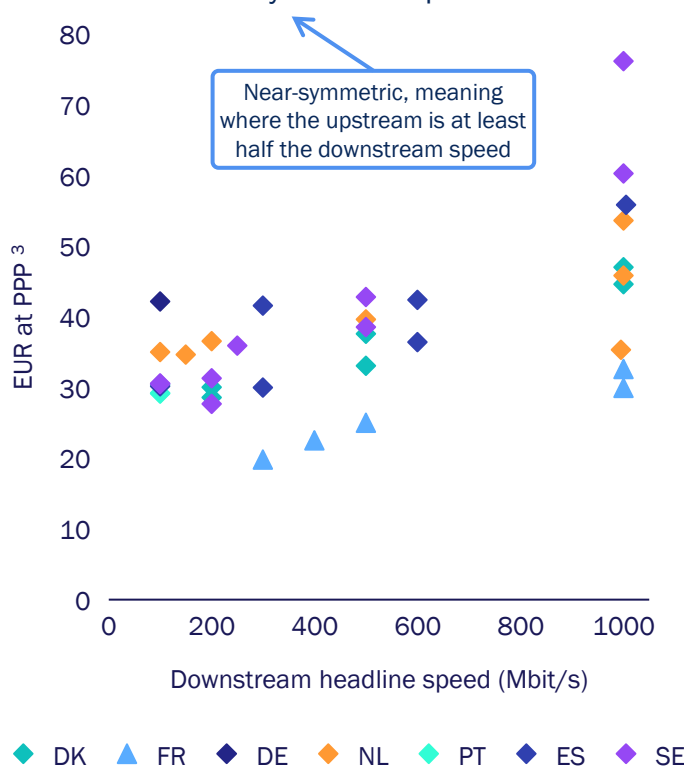


Based on analysis by Analysys Mason of Speedtest Intelligence® data for average fixed latency and jitter in select European countries, Q1-Q2 2021. Ookla trademarks and data used under license and reprinted with permission.

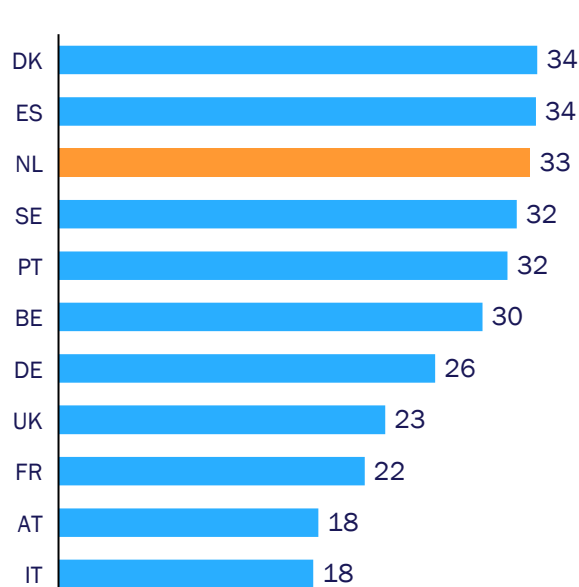
Based on analysis by Analysys Mason of Speedtest Intelligence® data for average fixed download speeds in select European countries, Q1-Q2 2021. Ookla trademarks and data used under license and reprinted with permission. Coverage from DESI 2021; UK value from DESI 2020.

The Netherlands scores highly for fixed connectivity in DESI 2021. Our retail-price estimates for high-speed broadband services indicate that Dutch prices are reasonable given their superior connectivity and performance

Monthly price per subscriber, 'near-symmetric' speeds



Fixed broadband connectivity score

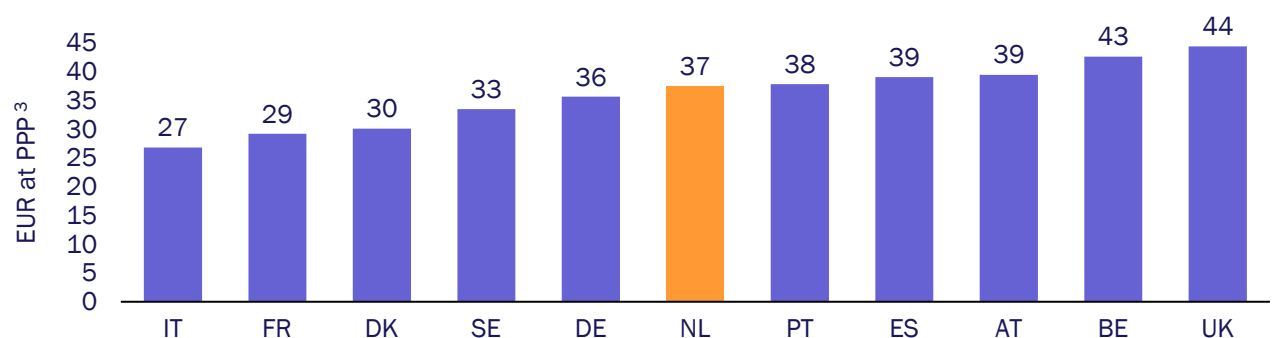


The Netherlands moves into a clear second place when the mobile connectivity sub-component score from DESI 2021 is added to the above

Source: Digital Economy and Society Index (DESI) 2021; sum of the two fixed broadband sub-components; UK value from DESI 2020

Source: Analysys Mason, operator websites (first-half 2021)

Median price per subscriber per month (all products with speeds of 100Mbit/s or higher)



Source: Analysys Mason, operator websites (first-half 2021)

Our approach to the retail pricing comparison

- Value added tax (VAT) excluded
- Deductions estimated for voice/TV in multi-play packages
- Prices adjusted relative to Dutch purchasing power³
- Prices adjusted to account for gifts, rebates and vouchers
- Capital cities used for postcode-dependent pricing
- Reference period of 24 months

¹ FTTP stands for fibre-to-the-premises

² Very-high capacity networks (VHCNs) are defined by BEREC in its guidelines of 1 October 2020 as being either a FTTP deployment or by satisfying a number of technical requirements at peak-time including (but not limited to) bandwidth, latency and jitter. Different technical requirements are defined for fixed-line and wireless technologies

³ Purchasing power parity (PPP) adjustments sourced from World Bank, with adjustment factors calculated relative to Dutch prices