

# State of Mobile Networks: Netherlands (September 2018)

The Netherlands mobile market is one of the most advanced in the world. On top of average 4G speeds well in excess of 40 Mbps, all four national operators have now passed 90% in our 4G availability category – the first time we have seen this in our European reports. One operator continues to dominate our Netherlands mobile analysis, winning or drawing in six out of our seven categories. And this dominance looks set to continue with a major mobile merger likely to be approved before the end of the year. But our analysis of speed found that while download rates are impressive, growth has somewhat stalled. In our latest look at the Netherlands, we analyzed over 312 million measurements to examine the 3G and 4G user experience offered by the country's four national operators.

## Report Facts

 312,699,324 Measurements	 20,323 Test Devices	 May 1 - Jul 29, 2018 Sample Period	 Netherlands Report Location
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## Highlights

### 4G availability passes 90% for all operators

Our 4G availability award was tied between Tele2 and Vodafone, with T-Mobile losing out after a three-way tie six months ago. But all four national operators have now passed the 90% milestone – the first time we have seen this in a country report.

### T-Mobile's 4G speed remains breathtakingly fast

T-Mobile kept its award in our 4G download category with a hugely impressive score of just over 50 Mbps – over 6 Mbps faster than its closest rival. However all four of the Dutch operators have passed 35 Mbps in our 4G download speed measurements, while three have scores over 40 Mbps.

### Dutch 4G download speeds appear to have peaked

Vodafone showed the best increase of just over 2 Mbps in our 4G download speed analysis. The fourth-placed operator was the only one to show any significant growth however, as the market appears to be approaching the current limit of LTE networks technology with the spectrum available.

### T-Mobile dominance looks set to continue

T-Mobile won our 4G download, 4G upload, 4G latency and overall speed awards outright, and drew in two others. And with its buyout of Tele2 likely to be approved before the end of the year, this dominance looks set to stay.

## Awards Table

	Download Speed: 4G	Download Speed: 3G	Download Speed: Overall	Upload Speed: 4G	Latency: 4G	Latency: 3G	Availability: 4G
KPN							
T-Mobile							
Tele2							
Vodafone							



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## Performance by Metric



## Analysis

The Dutch mobile market is doing prodigiously well. Our analysis of the Netherlands has found 4G availability has topped 90%, while average LTE speeds are now generally above 40 Mbps. The market is among the best we have measured; but while we are seeing 4G availability continue to expand, growth in 4G download speeds appears to be slowing. Indeed, our analysis of other highly advanced LTE markets suggests that further significant growth will be difficult to achieve, since 4G speeds over 50 Mbps and availability over 95% are rare indeed. So what are the key trends in the Netherlands, and where does one of the world's most advanced mobile markets go from here?

A quick glance at our awards table would suggest there's been little change in the Netherlands since our last [Mobile Networks Update](#) report in March. T-Mobile continues to dominate, winning or drawing six out of our seven categories, as the Deutsche Telekom operator took our 4G download, 4G upload, 4G latency and overall download speed awards outright, drawing in 3G download and 3G latency. The operator was squeezed out of the 4G availability category however, which was honed down to a draw after a three-way tie six months ago.

For this report, OpenSignal analyzed 312 million measurements collected from 20,323 mobile devices between May 1 and July 29, 2018. We used that data to compare the 3G and 4G services of the four national operators in the Netherlands: KPN, T-Mobile, Tele2 and Vodafone. Let's start by looking at 4G availability, where the country continues to impress.

### A close race in 4G availability as all operators pass 90%

We saw a tie in our national 4G availability metric between Tele2 and Vodafone, after a three-way draw in this category in our [last report](#). All four of the Netherlands national operators' scores stayed virtually static, with the two leaders at over 93%, followed by T-Mobile at just under 92% and KPN at 90% – but T-Mobile's speed waned just enough to see it drop out of the awards.

Nevertheless, all four of the Netherlands' operators scored over 90% in our analysis of 4G availability – the first time we have ever seen this in Europe. We expect this to become a not uncommon occurrence in the near future however as LTE networks become more ubiquitous. The Netherlands featured in the top six countries for 4G availability in our most recent global [State of LTE](#) report with a national overall score of 89.6% – just outside the top five countries, who all had national scores over 90%. And the Netherlands will almost certainly break the 90% mark in our next State of LTE report.

There is still room for the Dutch to grow. South Korea topped our list of countries with a national 4G availability score of over 97% – however we don't expect this score to get much better. We recently took a look at [LTE in London](#) to answer the question of whether operators will ever be able to achieve 100% 4G availability and concluded that "hotspots" (areas of limited or no mobile coverage) will never go away completely as they're part of the nature of building cellular networks. And in tandem with increased 4G availability, many mature markets like the Netherlands are still seeing increasing consumption of LTE data – putting pressure on network capacity.

### T-Mobile remains on top as 4G download speeds stagnate

T-Mobile kept its place at the top of our 4G download speed table with a highly impressive score of just over 50 Mbps – and remains the only Dutch operator to pass this milestone. But most of the country's operators have seen average 4G download speed growth stall in the past six months. KPN and Tele2 saw little change in our measurements with average speeds of 44 Mbps and 41 Mbps respectively, while Vodafone showed the greatest increase of just over 2 Mbps to reach 36 Mbps and close the gap on its rivals. Nonetheless, 4G download speeds of over 40 Mbps are very impressive, and it may be the case that LTE speed growth in the Netherlands is slowing as operators approach the limits of today's 4G network capabilities.

### Little change in any of our speed categories

In our overall speed category, which factors in the combined speeds of operators' 3G and 4G networks and the level of access to each technology, T-Mobile kept its lead. The operator saw its speed fall slightly to just under 45 Mbps, but its closest rivals both stayed fairly static at just under 38 Mbps, while Vodafone again saw the greatest increase in its score of over 2 Mbps to reach nearly 34 Mbps and close the gap.

In our analysis of 3G download speeds, all three operators we measured saw slight rises – though the category remained a statistical draw between T-Mobile and Vodafone. But 3G is arguably waning in importance in the Netherlands as 4G availability rates pass 90%, and both KPN and Vodafone have announced they will [shut down their 3G networks](#) by the end of 2022.

### T-Mobile continues to dominate latency

We also saw very little movement in our latency awards, as T-Mobile remains in the lead in 4G latency with a score of just under 30 milliseconds. Latency measures the response rate of mobile networks, meaning the lower the score, the better. KPN's 4G latency score remained fairly static at 33ms, while Vodafone and Tele2 both saw slight improvements to reach 37ms and 39ms respectively. In our 3G latency analysis, T-Mobile and Vodafone remained tied with scores of close to 53ms in our measurements, although both have improved by over 4ms in the past six months. But it was KPN who showed the greatest improvement in this category, of over 13ms to reach 71ms and close the gap on its rivals.

Competition remains high in the Netherlands' mobile sector as the market approaches saturation. This has triggered an M&A wave across Dutch telecoms, with the most significant mobile merger of T-Mobile and Tele2 [still awaiting regulatory approval](#) – although this is expected to be resolved before the end of the year. The shift in the balance of power that this merger will undoubtedly cause could be apparent by our next report, and we will continue to closely monitor the mobile market in the Netherlands as these developments unfold.

*EDITOR'S NOTE: We have not included 3G speed and latency metrics for Tele2 in this report, since the operator does not own or operate a 3G network.*

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## Our Methodology

OpenSignal measures the real-world experience of consumers on mobile networks as they go about their daily lives. We collect 3 billion individual measurements every day from tens of millions of smartphones worldwide.

Our measurements are collected at all hours of the day, every day of the year, under conditions of normal usage, including inside buildings and outdoors, in cities and the countryside, and everywhere in between. By analyzing on-device measurements recorded in the places where subscribers actually live, work and travel, we report on mobile network service the way users truly experience it.

We continually adapt our methodology to best represent the changing experience of consumers on mobile networks and, therefore, comparisons of the results to past reports should be considered indicative only. For more information on how we collect and analyze our data, see our [methodology page](#).

For this particular report, 312,699,324 datapoints were collected from 20,323 users during the period: May 1 - Jul 29, 2018.

For every metric we've calculated statistical confidence intervals and plotted them on all of the graphs. When confidence intervals overlap for a certain metric, our measured results are too close to declare a winner in a particular category. In those cases, we show a statistical draw. For this reason, some metrics have multiple operator winners.

## Recent Netherlands Reports

-  [Mobile Networks Update: Netherlands](#) (March 2018) [Read report](#)
-  [State of Mobile Networks: Netherlands](#) (September 2017) [Read report](#)

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