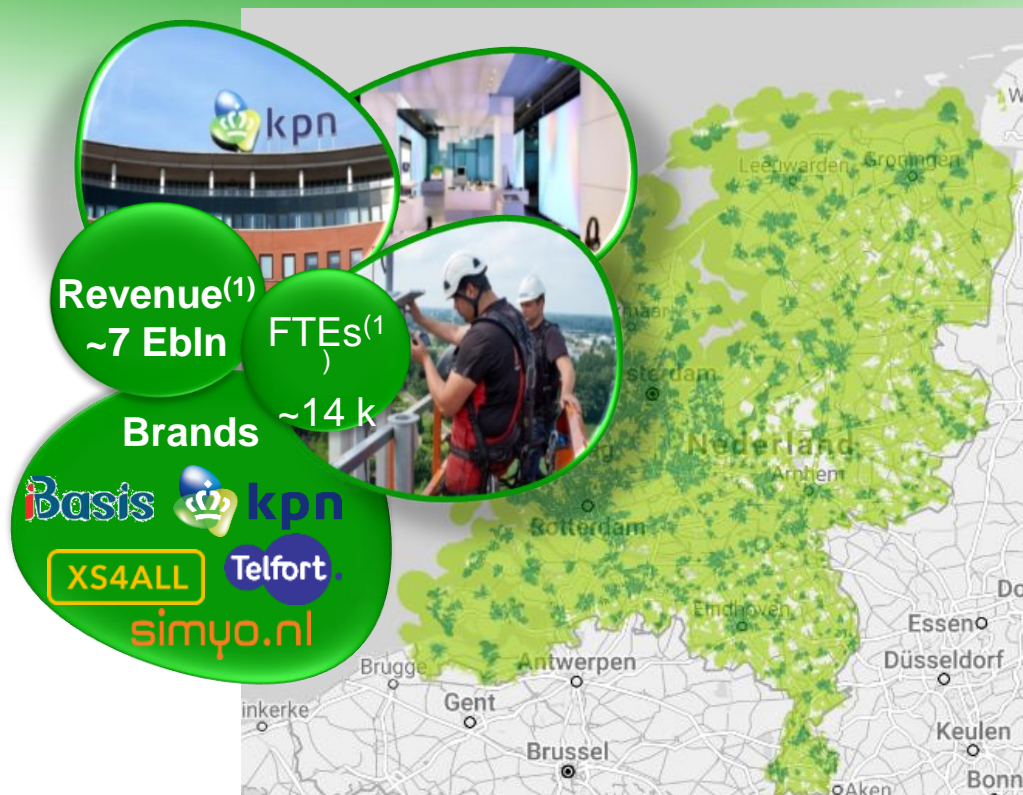


Building the gigabit society

Eelco Blok



KPN at a glance



99%

Mobile 4G network with 99% geographic and population coverage



99%

World first nationwide LoRa network for Internet of Things



72%

Fixed network with 72% of households with download speeds of 100 Mbps



NPS +10 for Consumer Mobile in Q2 2016

Mobile

9.5 M customers

Retail, Wholesale, Business Market

Broadband

3.8 M

Retail, Wholesale, Business Market

Television

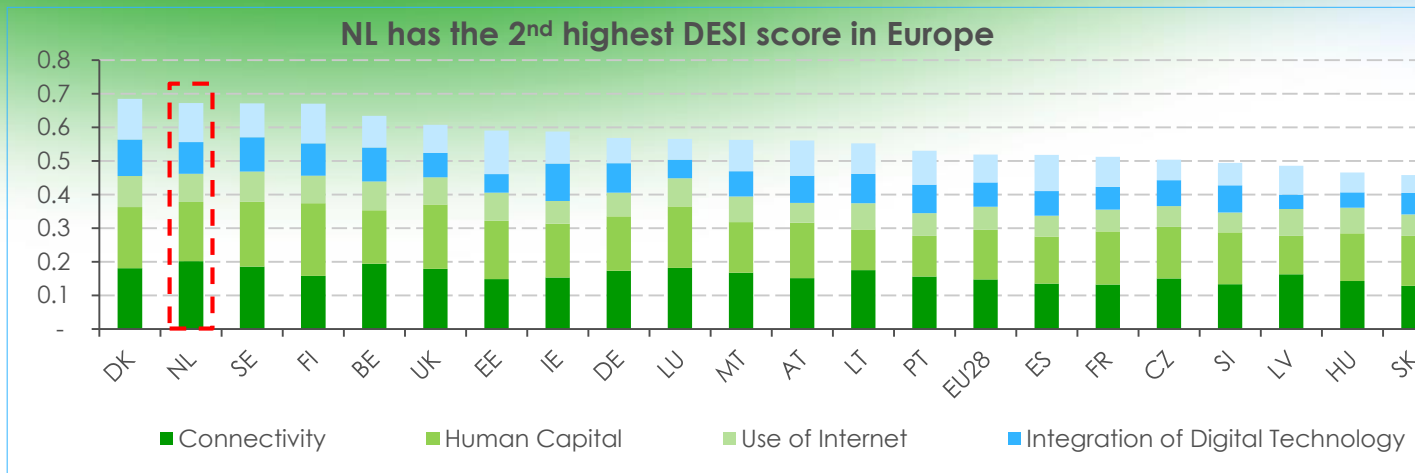
2.2 M

Retail

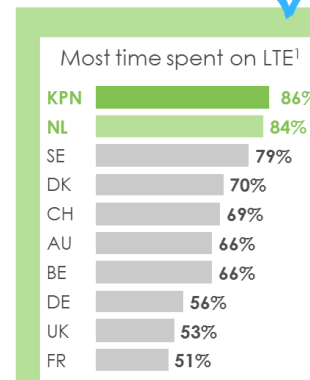


The Netherlands scores well on Digital Society & Economy

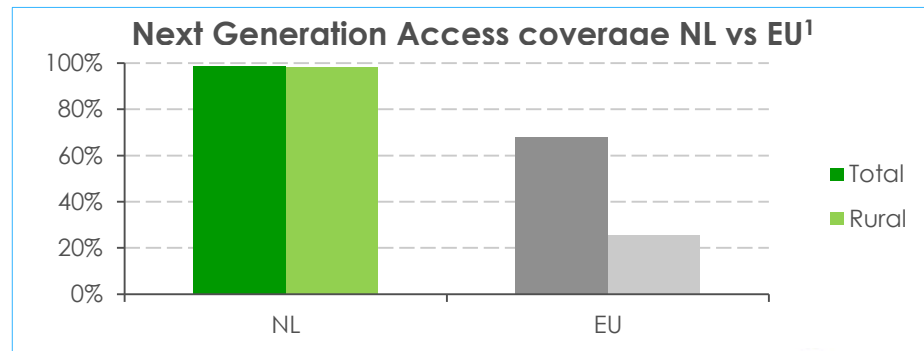
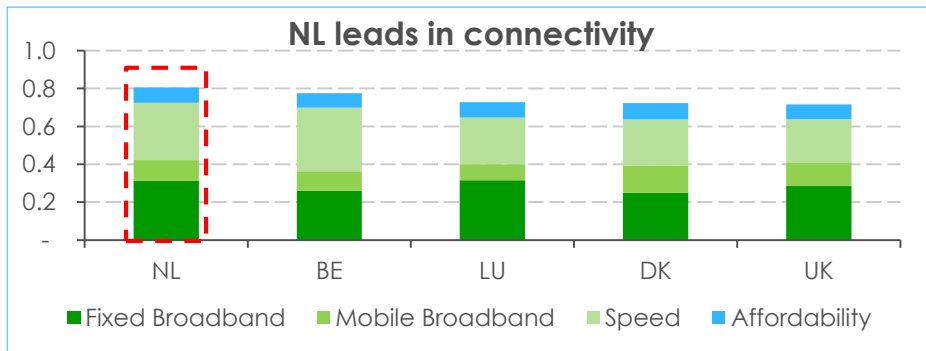
Mainly due to strong connectivity



First to reach nationwide 4G coverage in Europe



1) OpenSignal; The state of LTE (February 2016)



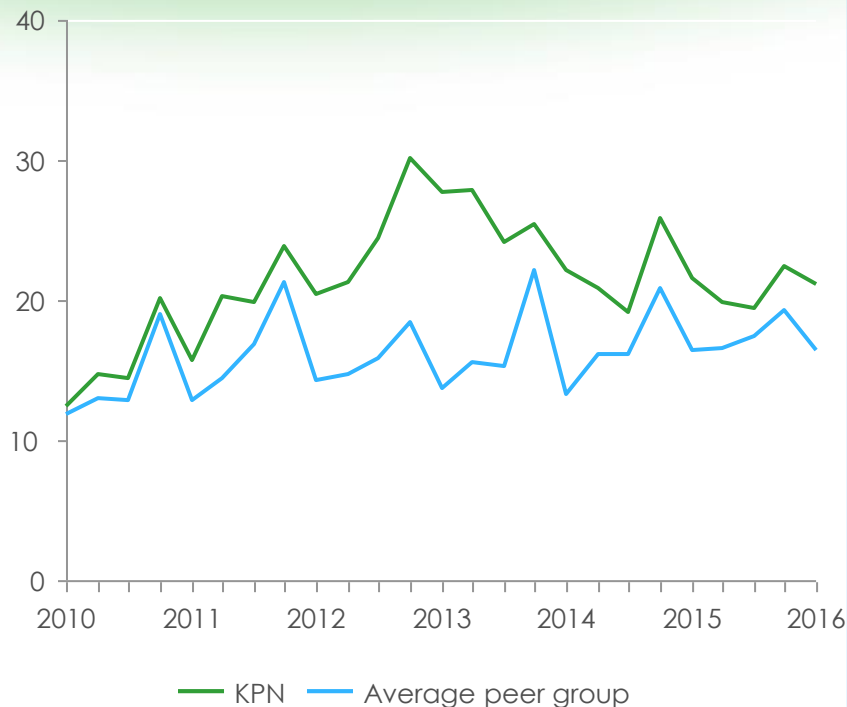
¹ 2014 data, source: EC presentation on broadband market developments in the EU (June 2015)

High investments led to best-in-class connectivity

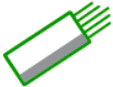


Future connectivity secured by ongoing investment program

KPN invested more than peers

Capex /
Sales (%)



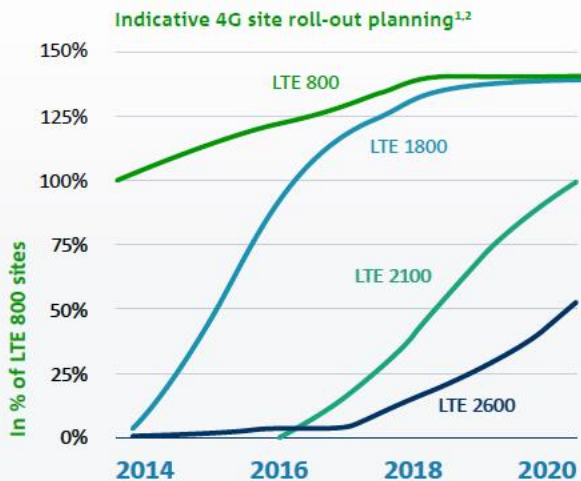
...and continues to build capacity

	Investment program 2016	Future investment programs
 Technology	FttC/FttH	VPlus
 Carrier aggregation	800/1800MHz	Virtualization
 Simplification program	~€ 450m savings	IT processes & networks

Staying ahead of demand for mobile data

Fully utilizing spectrum position for excellent customer experience

4G CAPACITY ROLL-OUT AHEAD OF DATA GROWTH

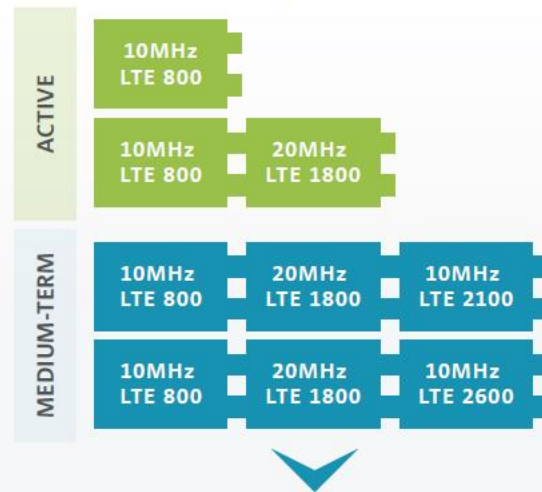


1 Rebased to LTE 800 sites end 2014

2 Excluding small cells



UTILIZING FULL SPECTRUM TO DEPLOY CARRIER AGGREGATION

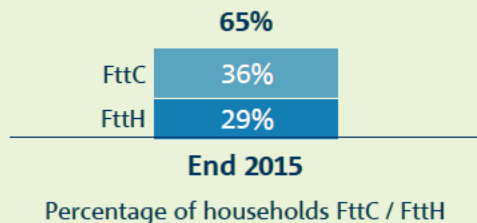


Increasing capacity and enabling
download speeds up to 400Mbps

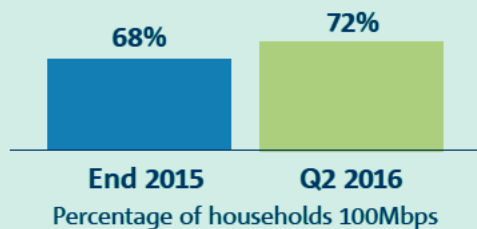
Best fixed access provider

Investment-led strategy enabling superior customer experience

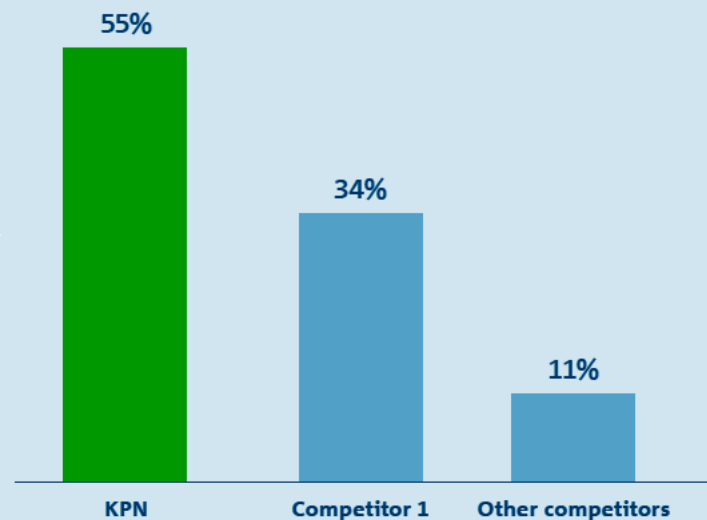
Rising FttC / FttH penetration



Driving coverage 100Mbps



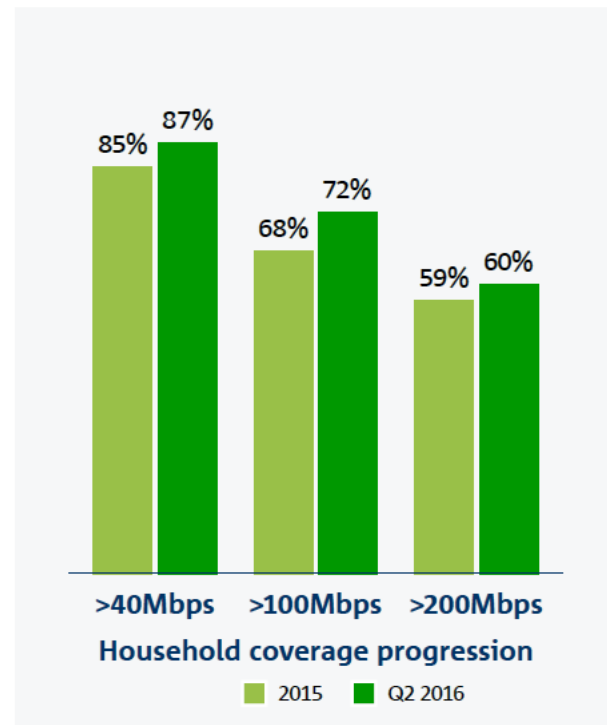
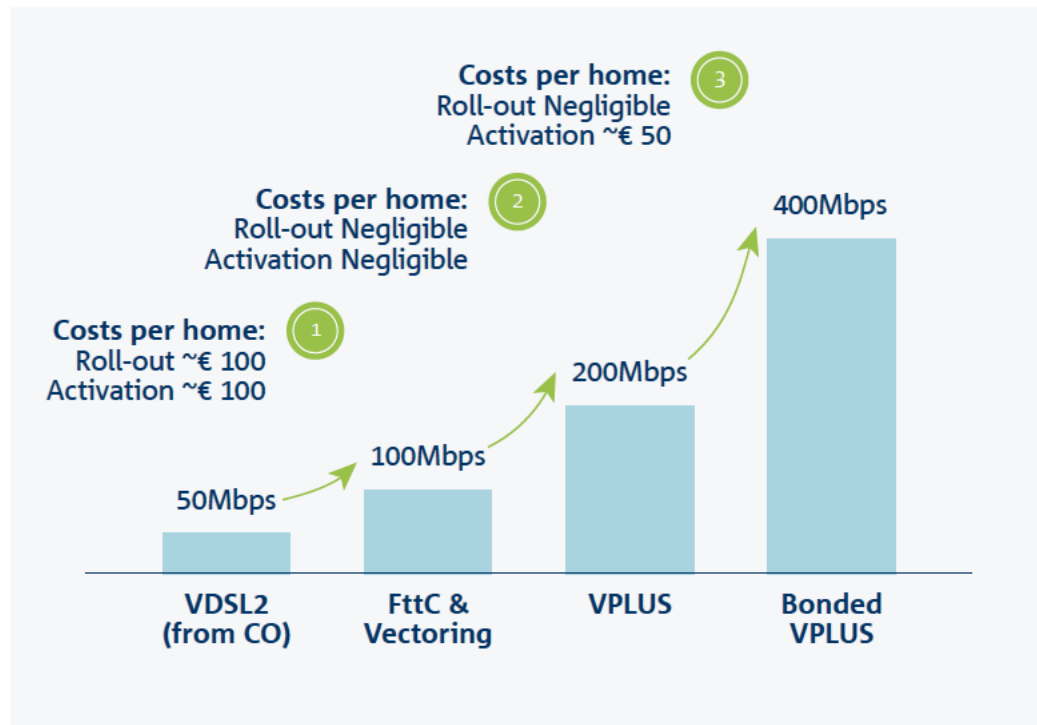
Best fixed network quality according to customers¹



¹ Independent market survey (Q4 2015)

Ready to upgrade if demand changes

Cost and time efficient upgrades with FttC investments largely completed in 2016



Regulate for the future

Regulation should focus on:

- A level playing field regarding network access
- Faster access to and harmonisation of frequency allocation
- Same service, same rules for OTT and telco

