

The 2026 Fixed-Line Network Test in the Netherlands



Photo: Pavlo Glazkov shutterstock

For the fifth time, umlaut and connect have examined the performance of the fixed-line networks in the Netherlands. This year, all three nationally active operators achieved outstanding results. The regional assessment also shows many strong results.

Since 2022, umlaut and connect have applied umlaut's sophisticated crowdsourcing approach to offer a comprehensive look at the user experience of fixed-line customers in the Netherlands. This year's analysis shows that the performance level of all the operators analysed has improved once again significantly compared to our test in the previous year. This raises the results of all three nationwide operators to the grade "outstanding", with Odido winning in a tight race with two points ahead of KPN, and Ziggo following on third rank at close distance.

Scope

For its assessment of the Dutch fixed-line operators, umlaut has conducted crowd-sourced analyses based on data gathered between the calendar weeks 33/2025 (mid-August) and 04/2026 (late January). A total of 359,629,895 samples was considered in the analyses. The detailed methodology of our assessment is described on pages 8 and 9 of this report.

Crowdsourcing Facts

359.6
million
samples

24
weeks
(mid-August 2025 to
late January 2026)

max. 1000 Points

Odido



ziggo

GEOGRAPHIC AVAILABILITY
max. 100

98.1

98.7

96.8

DOWNLOAD SPEEDS
max. 400

395.6

391.7

397.7

UPLOAD SPEEDS
max. 220

214.4

214.0

208.1

LATENCY
max. 230

223.3

225.7

209.0

STABILITY
max. 50

49.3

48.5

49.0

RESULT GRADE
981
outstanding979
outstanding961
outstanding

The shown numerical values shown are rounded. The exact, non-rounded values were used for the calculation of points and totals.

The Dutch Fixed-Line Operators



The Koninklijke PTT Nederland N.V. or in short KPN has been the leading provider of telecommunications in the Netherlands for almost 140 years. KPN emerged from the privatisation of the formerly state-owned PTT in 1998.

For 2025, the company reported approx. 4.4 million fixed broadband customers. Based on the publicly available numbers, KPN managed to surpass former market leader Ziggo in terms of subscriber numbers in 2024 and is currently still the largest fixed-line operator in the Netherlands.

In early 2021, KPN and the Dutch pension fund APG announced the start of their joint fibre company "Glaspoort", which is scheduled to invest more than 1 billion Euros in the construction of approximately one million fibre connections in villages, small residential areas and business parks. In 2024, Glaspoort announced to acquire parts of the fibre-optic network owned by Delta in various municipalities in the Netherlands, covering a total of approximately 200,000 households.



The Dutch subsidiary of the international Vodafone Group acquired the operator Libertel in 2003, forming Vodafone Netherlands. In 2016, it merged with the cable and fibre operator Ziggo. Up to February 2026, the joint company VodafoneZiggo was owned 50% by the Vodafone Group and 50% by Liberty Global. At this point, Liberty Global announced to purchase Vodafone Group's 50% stake in VodafoneZiggo, which is supposed to be transferred to a new holding company, Ziggo Group. Vodafone Group will receive a 10% share in Ziggo Group.

At the end of 2025, VodafoneZiggo reported to cover approx 3.4 million broadband subscribers. This corresponds to a fixed broadband market share of about 40 per cent, which according to connect's research makes Ziggo the second largest fixed broadband operator in the Netherlands.

Also, according to VodafoneZiggo's latest publications, the company's fixed-line network reaches approx. 7.7 million "homes passed" – which would translate to a market potential of approx. 90 per cent of the 8.4 million households in the Netherlands.



In 2000, Deutsche Telekom bought a minority of the Dutch mobile network operator Ben, which was later extended to a 100 per cent acquisition. In 2003, Ben was renamed T-Mobile Netherlands, with the brand "Ben" becoming a "no-frills" offer within its portfolio. In 2007, T-Mobile Netherlands additionally acquired Orange. The acquisition of Thuis in 2016 marked T-Mobile Netherlands' entry into the fixed broadband market. In 2018, the company completed its acquisition of the smallest Dutch operator, Tele2, which brought both its own mobile as well as its own fixed-line network to the merger. The company also announced a strategic partnership with Open Dutch Fiber in 2021.

In the same year, T-Mobile Netherlands was acquired by the private equity investors Apax and Warburg Pincus, each of whom owns a 50% share of the joint company. In consequence, the operator was renamed as „Odido“ in fall 2023. According to recent market studies, Odido has surpassed 1 million fixed broadband customers in the Netherlands in 2025. This corresponds to a share of 10 to 15 per cent of the Dutch fixed-line market, making the company the third largest fixed-line broadband operator in the country.

The 2026 Fixed-Line Network Test in the Netherlands

Results at a Glance

Odido

Odido is the winner of the umlaut connect 2026 Fixed-Line Network Test in the Netherlands, achieving the overall grade “outstanding”. In comparison to the previous year, Odido improved by 17 score points. The fixed-line operator secures its win with the highest performance in the Upload Speed category and very strong results on all other assessed categories. Odido is slightly ahead of Ziggo in the Stability assessment and slightly ahead of KPN in terms of Upload Speeds. In terms of Reliability, the results of all three nationwide operators are on the same level.



KPN ranks second, two points behind the overall winner Odido and also with the impressive overall grade “outstanding”. With a plus of 20 score points, the Netherlands’ largest fixed broadband provider also achieves the biggest score improvement in comparison to the previous year’s results. KPN is particularly strong in the Latency and Geographic Availability assessments. In terms of Upload Speeds, KPN ranks only slightly behind overall winner Odido, in terms of Stability and Download Speeds, KPN also shows excellent results. The Reliability of all nationwide operators scores on the same level.

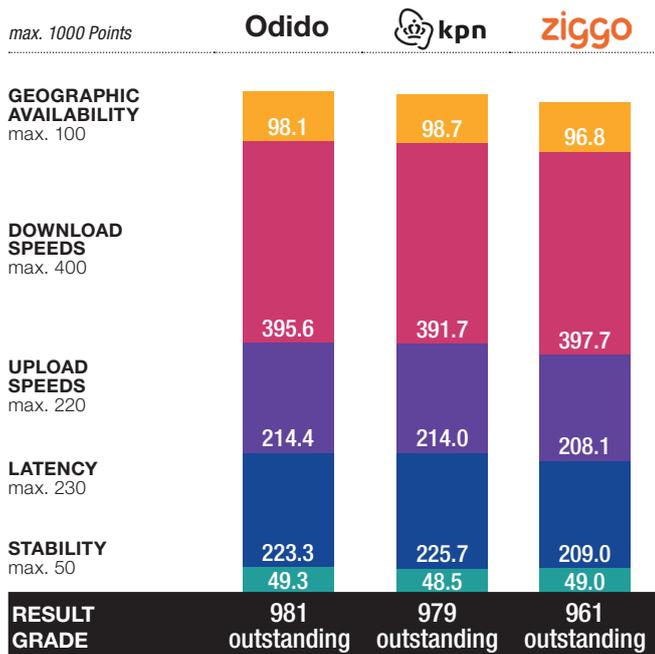


Ziggo ranks third and achieves the overall grade “outstanding” for the first time. The Netherlands’ second-largest fixed-line operator manages to improve its score by 17 points compared to its test result from the previous year. In our comparison, Ziggo achieves the strongest results in the Download Speed assessment, and ranks second in terms of Stability. In the Latency, Upload Speeds and Geographic Availability categories, Ziggo holds up well with the other nationwide fixed broadband operators. In our Reliability assessment, Ziggo ranks on the same level as Odido and KPN.



The 2026 Fixed-Line Network Test in the Netherlands

Results



connect
BEST IN TEST
ODIDO
3/2026
FIXED LINE NETWORK TEST
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“Congratulations to Odido for achieving ,Best in Test‘ for the third time in a row in the highly competitive environment of the Netherlands‘ fixed broadband providers, where all three nationwide Dutch operators achieve outstanding results. KPN ranks second, only two points behind winner Odido, showing particularly strong sub-results in our Latency and Geographic Availability assessments. Ziggo comes in third, with the best sub-scores in terms of Download speeds. Delta performs outstandingly in five Dutch provinces, jointly winning together with Odido in two of them.”
Bernd Theiss, Head of Testlab, connect

Detailed Results

Download Speeds

In the Download Speed measurements conducted by umlaut, Ziggo takes the lead with the highest values in the average and P10 values (90 percent of the measurements faster than...). In the P90 evaluation, which indicates the threshold surpassed by 10 percent and thus the fastest samples, Odido comes in first, followed by Ziggo and then KPN. In the assessment by speed classes, Ziggo is ahead in the Highspeed Class (minimum 50 Mbps), while KPN takes a narrow lead in the UHD Video class (minimum 20 Mbps), with KPN and Ziggo following on a par.

DOWNLOADS

ZIGGO

KPI Values	Odido	KPN	Ziggo
Download Speeds			
Ø Datarate [Mbps]	225.2	185.8	245.3
P10 Data Rate [Mbps]	62.9	61.6	71.1
P90 Data Rate [Mbps]	499.4	385.5	475.6
Highspeed Class [%]	95.4	95.2	96.1
UHD Video Class [%]	98.9	98.8	98.8

Upload Speeds

In the Upload Speed measurements, Odido shows the highest measurement values in the average, P10 and P90 (10 percent of the measurements faster than...) data rates. KPN follows at close distance and Ziggo at a little more pronounced gap in the average and P90 KPIs. In the speed-class-based assessment, KPN shows the highest fulfilment rate in the HD Video Class (at least 5 Mbps), with Odido and Ziggo following at a close gap and on a par. In the UHD Video Class (at least 20 Mbps), Ziggo is ahead, followed by Odido and then KPN.

UPLOADS

ODIDO

KPI Values	Odido	KPN	Ziggo
Download Speeds			
Ø Datarate [Mbps]	181.4	168.6	55.6
P10 Data Rate [Mbps]	29.6	26.8	26.4
P90 Data Rate [Mbps]	431.3	375.6	105.0
UHD Video Class [%]	95.5	94.5	95.7
HD Video Class [%]	99.3	99.5	99.3

Latency

In the Latency category, KPN gains the highest amount of score points. This is particularly due to its high fulfilment levels in the Standard Gaming Class (roundtrip times not slower than 50 ms) and Highend Gaming Class (latency below or equal 20 ms). In both, Odido follows at a small distance, and Ziggo at a little larger one. In the most demanding Ultra Low Latency (ULL) Class with roundtrip times not exceeding 10 ms, Odido is ahead of KPN by a narrow margin, while Ziggo follows at a more pronounced gap.

LATENCY

KPN

KPI Values	Odido	KPN	Ziggo
Latency			
Gaming Class [%]	98.6	99.2	98.5
Highend Gaming Class [%]	84.6	89.6	77.9
ULL Class [%]	60.4	58.7	17.2

Stability

The Transaction Success rates of all three nationwide operators are on a very high level. The success rates of Odido are slightly ahead of Ziggo, and Ziggo's KPI is slightly better than the one achieved by KPN. The additional look at the Download speed class Basic Internet (minimum 2 Mbps), shows a full 100 percent fulfilment at Odido and KPN, and only a minimally lower value at Ziggo. All in all, Dutch customers can be very content with the stability of their fixed-line broadband connections.

STABILITY

ODIDO

KPI Values	Odido	KPN	Ziggo
Stability			
Transaction Success [%]	99.4	98.6	99.1
Download Basic Internet Class [%]	100.0	100.0	99.9

The 2026 Fixed-Line Network Test in the Netherlands

Detailed Results

Geographic Availability

In the assessment of Geographic Availability (see page 9 for definition), KPN is overall slightly ahead of Odido, with Ziggo coming in third. KPN's lead is due to a higher percentage in the more highly scored Basic Availability KPI.

As in the overall Geographic Availability assessment, Odido ranks second and Ziggo third here. In the Speed Availability analysis, rewarding the availability of higher speed classes distributed over the country, Ziggo is ahead, Odido ranks second and KPN third.

GEOGRAPHIC AVAILABILITY

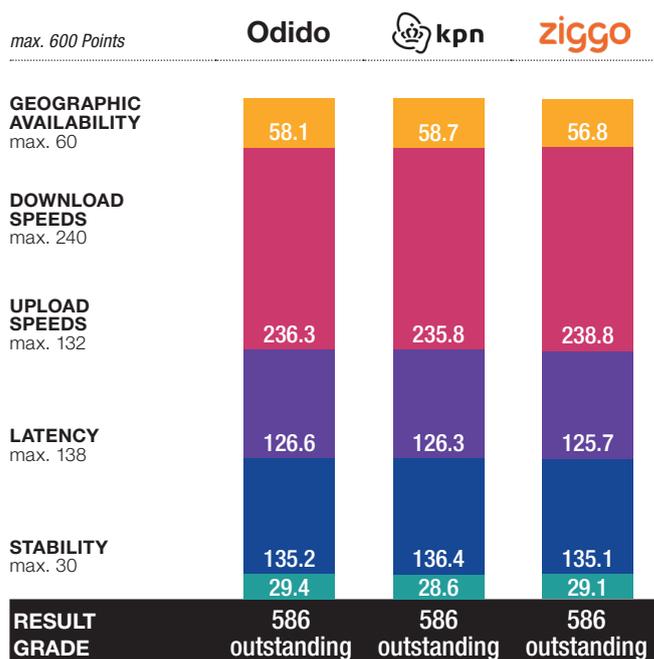
KPN

KPI Values	Odido	KPN	Ziggo
Geographic Availability			
Basic Availability	96.8	97.9	94.7
Speed Availability	90.1	89.6	94.6

Reliability

The "Reliability" section is not based on additional KPIs, but is rather a different look at the results of the various test categories. The analysis is based on the fact that umlaut distinguishes between "Qualifier KPIs" (basic needs) and "Differentiator KPIs" (performance-oriented KPIs) for all measured values – also see page 8. The Reliability assessment solely concentrates on the "Qualifier KPIs". As this evaluation only considers a subset of the achievable points, the reachable maximum in this section is only 600 points. In this consideration, all three nationwide operators achieve the same score and thus show an outstanding reliability in their fixed-line networks. When calculating the scores with decimal places, KPN achieves a slightly higher result than Odido, followed by Ziggo. However, according to connect's scoring principles, this does not establish a ranking order.

With a view to the single KPIs, in an overall tight race, Odido scores highest in the Stability and Upload categories, KPN is narrowly ahead in the Latency and Geographic Availability assessment, while Ziggo achieved the highest sub score in the analysis of the Reliability of Downloads. As already seen in the Stability category, the high and close results are good news for Dutch customers as they prove the outstandingly high reliability of the fixed broadband lines in the Netherlands.



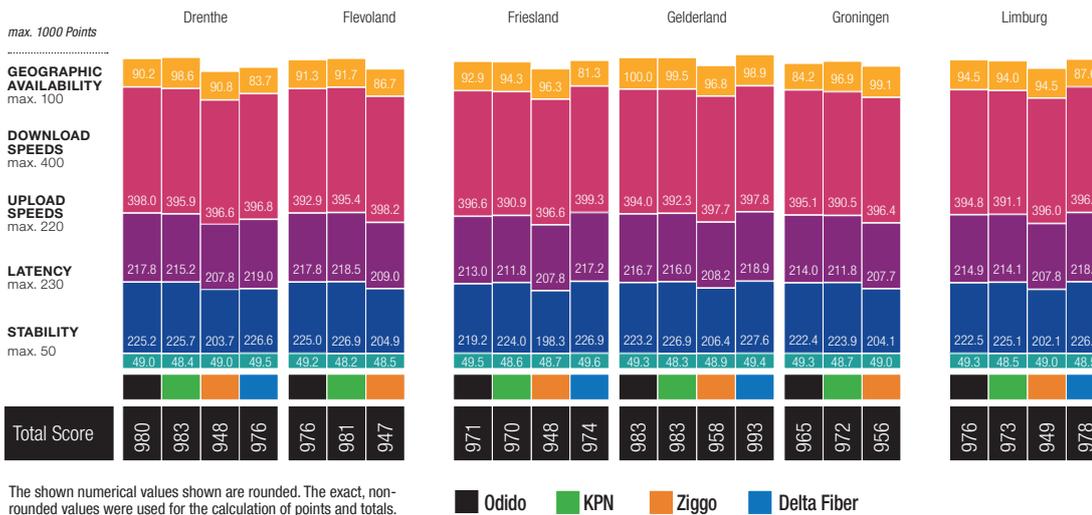
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The 2026 Fixed-Line Network Test in the Netherlands



Score Results per Province



BEST LOCAL RESULT

ODIDO
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Noord-Brabant, Noord-Holland, Joint Win: Overijssel, Zuid-Holland

BEST LOCAL RESULT

KPN
3/2026

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Drenthe, Flevoland, Groningen

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Odido KPN Ziggo Delta Fiber

In addition to the nationwide assessment, umlaut has also evaluated the local results achieved in the twelve Dutch provinces. With these analyses, inhabitants of these various parts of the country can check which operator may locally be the best choice. If a result is not published for a particular operator in a particular province, the number of samples for this combination was too low to specify a statistically reliable result.

As in the nationwide assessment, the overall level of performance is very high, and the margins between the candidates' results relatively small. Still, we see distinct rankings in each of the examined provinces.

Odido wins in two provinces, Co-Winner in Overijssel and Zuid-Holland

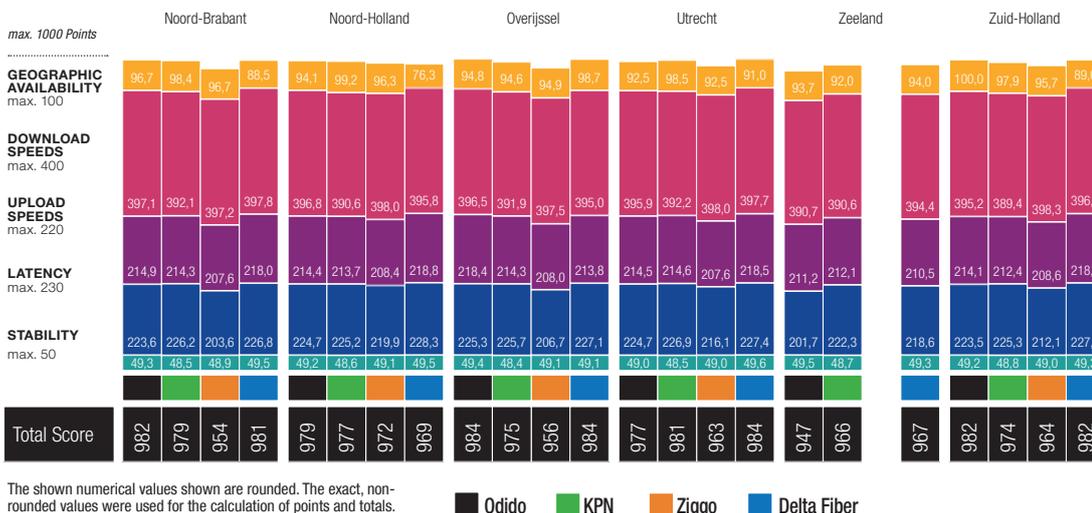
In the detailed analysis, Odido takes the lead in two of the considered Dutch provinces. In Noord Brabant and Noord Holland the operator takes the lead with outstanding results. In Overijssel and Zuid-Holland Odido shares the top position with the locally active fiber provider Delta (see below), who also achieves outstanding scores there.

KPN local champion in three provinces: Drenthe, Flevoland and Groningen

KPN takes the lead with outstanding results in Drenthe, Flevoland and Groningen. In Gelderland, KPN scores on a par with Odido, but behind Delta.

Delta ahead in five provinces, Co-Winner in Overijssel and Zuid-Holland

Delta Fiber, which includes the Delta and Caiway brands, offers a TV cable network as well as fibre connections to approximately 1.7 million households (homes passed) in various Dutch provinces. The company reports 1.1 million homes "connected" and customer base of approx. 600,000. Currently, we consider Delta as a regional fixed-line provider in the Netherlands, based on the observed distribution of Delta lines. The operator leads in Friesland, Gelderland, Limburg, Utrecht and Zeeland, achieves top-results also in the other considered Dutch provinces and is the joint winner together with Odido in Overijssel and Zuid-Holland.



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Odido KPN Ziggo Delta Fiber

BEST LOCAL RESULT

DELTA
3/2026

FIXED LINE NETWORK TEST IN THE NETHERLANDS
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Friesland, Gelderland, Limburg, Utrecht, Zeeland, Joint Win: Overijssel, Zuid-Holland

The 2026 Fixed-Line Network Test in the Netherlands

Methodology

The umlaut connect Fixed-Line Network Test is based on a sophisticated crowdsourcing approach. The analysis considers data gathered over a period of 24 weeks and represents the real-life user experience of fixed-line customers.

The network tests conducted by umlaut and connect are widely accepted as the de-facto industry standard and for being highly objective. With a further refinement of the crowdsourcing methodology already known from umlaut's accredited mobile network tests, it became also possible to analyse relevant performance KPIs of fixed-line services.

Fixed Network Crowdsourcing

The data basis for the analyses is determined on smartphones and tablets. To this end, the parameters described below are recorded in the background when thousands of popular apps are used – provided that the user has consented to the completely anonymous collection of data. At specific intervals (from one second to 15 minutes), random samples are generated and sent daily to umlaut's cloud servers, where the data is then processed.

By filtering samples collected during a Wi-Fi connection (as opposed to mobile network connections) and identifying the network operator, the measured values can be limited to landline connections. A complex set of rules and extensive checks ensure the validity of the evaluations. For example, conspicuously slow connections are filtered out for the data rate and latency determinations – the threshold value is derived from the average performance of all lines observed in a country.

The analysis of Wi-Fi connections takes into account the fact that most Internet connections today are made via Wi-Fi. Since the Wi-Fi speeds possible with current smartphones are usually significantly higher than the observed overall data rates, the influence of the Wi-Fi link speed on the measurement results is negligible.

Active Data rates

In addition to passive observations of the data rates requested by apps, *active measurements of upload and download data rates* are also carried out regularly. They determine the amount of data that can be transferred in 3.5 seconds and derive the data rate from this.

Our scoring takes into account the average data rate, the P10 value (90% of the values are above the specified threshold, a good approximation of the typical minimum speed) and the P90 value (10% of the values are above this threshold, a look at the peak values) for the measured values determined.

We supplement the determined active download and upload speeds with a classification of these KPIs into application-related speed classes. For this purpose, umlaut has defined speed classes that reflect suitability for specific applications: *UHD video* requires 20 Mbps, *high speed* requires 50 Mbps. For uploads, which are typically slower, the speed classes *HD video* (min. 5 Mbps) and *UHD video* (min. 20 Mbps) are taken into account. Download speed measurements account for 40 per cent of the overall result, while upload data rates contribute 22 per cent.

Download Speeds

40%

Average Data Rate

90% of Measurement Values above

10% of Measurement Values above

Highspeed Class

UHD Video Class

Basic Availability

Speed Availability

Geographic Availability

10%

Upload Speeds

22%

Average Data Rate

90% of Measurement Values above

10% of Measurement Values above

UHD Video Class

HD Video Class

Standard Gaming Class

Highend Gaming Class

Ultra Low Latency Class

Latency

23%

Transaction Success

Download Basic Internet Class

Stability

5%

Latency

Latency measurements are taken every 15 minutes – pings are performed immediately after the connection tests. The first 'hop' affected by Wi-Fi is calculated out. umlaut also assigns the results to an application-specific class: round-trip times of less than 50 ms qualify a sample for *standard gaming* and less than 20 ms for *high-end gaming*. If the latency is less than 10 ms, the sample is counted as *ultra-low latency* (ULL), which is sufficient for near-real-time applications. Our tables show the percentage of samples that meet or exceed the required thresholds for each of the classes mentioned. The latency rating accounts for 23 per cent of the result.

Stability

Based on browsing and connection tests as well as additionally passively observed data transfers, umlaut also examines when a broadband connection is actually available. In addition, umlaut takes into account the (passively determined) download data rates in the *basic internet speed class* (min. 2 Mbps).

These do not serve as performance KPIs, but rather to check whether data is flowing at all. They supplement the percentage success rate of Internet transactions. The averaged and weighted results contribute 5 per cent to the overall result.

The 2026 Fixed-Line Network Test in the Netherlands

Methodology (continued)

Geographic Availability

When assessing fixed networks, their geographical availability is an important factor. On the one hand, the best network performance is of little use if potential customers cannot actually sign up for the service in question. On the other hand, it makes a big difference to the roll-out and operation of a network whether it is offered across virtually the entire country or whether connections are limited to a few lucrative metropolitan areas.

We take this fact into account with the Geographic Availability metric newly introduced this year, which contributes ten per cent to the overall result.

The Geographic Availability assessment is based on the 2x2 km tiles ('evaluation areas') also used in our mobile network test. umlaut combines 8x8 of these to form a 'super tile'.

Background: As a result of our crowdsourcing approach, providers with a small market share are also represented with a smaller share among the observed users. In order to achieve reliable results in determining the networks' geographic availability even with a relatively small number of customers, we have therefore chosen comparatively large tiles for this analysis.

In fact, a single observed participant in a 16 x 16 km zone is sufficient for the corresponding super tile to be counted as covered by the respective provider. The maximum number of super tiles for the area of the Netherlands is 97.

From the respective total number, those super tiles that are uninhabited or undeveloped are deducted for each country. This value is then used as a reference value for calculating *basic availability*.

In addition, we determine the highest download data rate recorded during the observation period for each subscriber connection. This value is assigned to a speed class and converted into the *Speed Availability* score using a weighted formula. The higher the data rates observed in the respective super tile, the higher the score.

This indicator thus provides information about the geographical availability of high-bitrate services from the respective network operator. The Geographic Availability metric accounts for 10 per cent of the overall result.

Reliability

All measured values collected and described above are divided into basic requirements ('qualifier KPIs') and values related to maximum performance ('differentiator KPIs').

The reliability rating only takes into account the 'qualifier KPIs' and thus allows a statement to be made about how well a provider's network meets the basic requirements. The maximum points that can be achieved in the reliability rating are adjusted accordingly – a total of 600 out of 1000 points are awarded in the overall rating.