

The report is based on data regularly collected from all operators in the Croatian electronic communications market. In certain cases HAKOM cannot observe irregularities in reports/data until several consequent periods are compared. As a result, HAKOM emphasises that minor discrepancies from actual data are possible.

HAKOM does not assume the responsibility for the quality of data reports delivered by the operators.

| Fixed telephony services | Q1 2020 | quarterly change Q1 2020 – Q4 2019 | annual change Q1 2020 – Q1 2019 |
|---|--------------------|---------------------------------------|------------------------------------|
| Total fixed telephony services revenue (HRK) | 280.358.331 | -5,74% | -13,95% |
| <i>Retail revenue</i> | <i>245.198.322</i> | <i>-3,45%</i> | <i>-9,53%</i> |
| <i>Wholesale revenue</i> | <i>35.160.009</i> | <i>-19,12%</i> | <i>-35,82%</i> |
| Total number of fixed lines | 1.310.206 | -1,24% | -2,41% |
| Stand-alone – fixed voice telephony subscribers | 482.311 | 30,35% | 20,46% |
| Number of subscribers ¹ | 1.239.167 | -0,66% | -1,66% |
| CPS subscribers | 46.901 | -6,64% | -14,84% |
| Fixed originating voice minutes ² (min) | 435.231.736 | 6,89% | 0,45% |

¹ CPS (carrier pre-selection) subscribers are included

² includes all types of calls (local, national, international calls, calls to mobile networks and calls to VAS numbers)

| Mobile telephony services | Q1 2020 | quarterly change Q1 2020 – Q4 2019 | annual change Q1 2020 – Q1 2019 |
|--|--------------------|---------------------------------------|------------------------------------|
| Total mobile telephony services revenue (HRK) | 907.291.344 | -15,87% | -10,25% |
| Retail revenue | 752.134.383 | -16,63% | -12,86% |
| <i>Retail revenue - Residential</i> | 541.088.570 | -17,92% | -14,58% |
| <i>Prepaid subscribers</i> | 198.908.398 | -20,90% | -15,37% |
| <i>Postpaid subscribers</i> | 342.180.173 | -16,08% | -14,12% |
| <i>Retail revenue - Business</i> | 211.045.813 | -13,14% | -8,09% |
| Wholesale revenue | 155.156.961 | -11,99% | 4,98% |
| Total number of active subscribers³ | 4.359.507 | -1,02% | 0,36% |
| <u>Residential</u> | 3.605.735 | -1,47% | -0,26% |
| <i>Prepaid subscribers</i> | 1.916.368 | -3,90% | -4,91% |
| <i>Postpaid subscribers</i> | 1.689.367 | 1,45% | 5,60% |
| <u>Business</u> | 753.772 | 1,15% | 3,45% |
| Mobile penetration ⁴ | 101,74% | -1,03% | 0,37% |
| Mobile originating voice minutes ⁵ (min) | 2.672.329.343 | 11,25% | 16,63% |
| International <i>roaming</i> traffic – own subscribers (min) | 169.763.745 | -1,34% | 3,28% |
| International <i>roaming</i> traffic – foreign subscribers (min) | 62.500.753 | -26,39% | -0,87% |
| Total SMS sent | 421.852.355 | -7,40% | -8,24% |
| Total MMS sent | 2.424.486 | -5,03% | -8,98% |

³ Definition of active pre-paid subscriber: Subscriber who has used a mobile service or refilled the account in the last 90 days. This definition applies to all operators. Before 2011 each operator used a different active pre-paid subscriber definition (90/180/270 days).

⁴ Mobile penetration has been calculated according to the last census of population from 2011

⁵ includes all types of calls (local, national, international calls, calls to mobile networks and calls to VAS numbers)

| Broadband access services ⁶ | Q1 2020 | quarterly change Q1 2020 – Q4 2019 | annual change Q1 2020 – Q1 2019 |
|--|----------------------|---------------------------------------|------------------------------------|
| Total access services revenue (HRK) | 1.116.114.035 | -3,49% | 2,88% |
| <i>Fixed broadband revenue⁷</i> | 445.323.158 | -11,72% | -8,38% |
| <i>Mobile broadband revenue</i> | 670.790.877 | 2,87% | 12,02% |
| Total number of broadband subscriptions (lines) | 4.919.555 | 2,95% | 6,87% |
| Fixed broadband subscriptions (lines) | 1.023.238 | -11,39% | -10,02% |
| <i>Own copper access</i> | 426.652 | -0,40% | -0,80% |
| <i>xDSL based broadband using full local-loop unbundling</i> | 133.707 | -2,70% | -11,55% |
| <i>xDSL based broadband using shared access</i> | 57 | 216,67% | 159,09% |
| <i>FttX – own infrastructure</i> | 112.006 | 5,89% | 25,21% |
| <i>Bitstream (xDSL, FttX)</i> | 154.682 | -0,94% | -4,35% |
| <i>Cable broadband</i> | 165.038 | -1,15% | -0,66% |
| <i>Fixed wireless access (FWA)</i> | 25.892 | -83,31% | -80,73% |
| <i>Other</i> | 5.204 | 4,00% | 22,71% |
| Mobile broadband subscriptions | 3.896.317 | 7,52% | 12,40% |
| <i>Residential</i> | 2.899.002 | 8,70% | 13,51% |
| <i>Dedicated data subscriptions (cards/modems/keys etc.)</i> | 298.268 | 106,72% | 131,80% |
| <i>Mobile phones⁸</i> | 2.600.728 | 3,10% | 7,24% |
| <i>M2M</i> | 6 | -79,31% | -79,31% |

⁶ From Q1 2020 subscriptions that are realized on chosen fixed location over the mobile network, which do not satisfy minimum obligations related to guaranteed speed, will not be reported under the number of fixed broadband subscriptions anymore. Until now, these subscriptions were reported under the fixed wireless access category. They are reported under mobile broadband subscriptions and corresponding indicators instead.

⁷ Dial up revenue is also included

⁸ Number of subscribers which have made an internet mobile connection in the last 90 days through mobile phones

| | | | |
|---|--------------------|---|--|
| <i>Business</i> | 997.315 | 4,22% | 9,30% |
| <i>Dedicated data subscriptions (cards/modems/keys etc.)</i> | 167.494 | 12,50% | 14,43% |
| <i>Mobile phones⁹</i> | 581.005 | 1,05% | 5,29% |
| <i>M2M</i> | 248.816 | 6,76% | 16,11% |
| Number of bundled services subscribers – 2D | 328.296 | -31,46% | -32,90% |
| Number of bundled services subscribers – 3D | 287.373 | 2,37% | -0,09% |
| Number of bundled services subscribers – 4D | 285.387 | 5,84% | 22,08% |
| Stand-alone – broadband subscribers | 137.069 | 1,93% | -3,36% |
| Broadband traffic (GB) | 493.512.547 | 21,86% | 39,43% |
| <i>Fixed broadband traffic (GB)</i> | <i>356.633.179</i> | <i>13,80%</i> | <i>20,92%</i> |
| <i>Mobile broadband traffic (GB)</i> | <i>136.879.367</i> | <i>49,45%</i> | <i>131,89%</i> |
| Television services | | | |
| | Q1 2020 | quarterly change Q1 2020 – Q4 2019 | annual change Q1 2020 – Q1 2019 |
| Television services revenue (HRK) | 201.158.868 | -0,46% | 3,99% |
| Stand-alone – TV subscribers | 119.180 | -15,12% | -26,68% |
| Cable reception | 177.021 | 0,09% | -2,96% |
| IPTV | 437.096 | 0,11% | 1,94% |
| Satellite reception (SAT TV) | 146.288 | -0,31% | 1,49% |
| Digital terrestrial reception – pay TV | 71.042 | 1,71% | 3,37% |
| RH households with digital terrestrial reception only ¹⁰ | 649.058 | -0,21% | -1,13% |

⁹ Number of subscribers which have made an internet mobile connection in the last 90 days through mobile phones

¹⁰ **RH households with digital terrestrial reception only** = (1.520.026 (number of households in the Republic of Croatia according to the last census of population from 2011) – 2,6% households without TV) – (number of Cable receptions + number of IPTV + number of Satellite receptions + digital terrestrial reception_pay TV)