Croatian quarterly electronic communications market data for 2.quarter 2025.

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Data presented in this Summary of the quarterly electronic communications market indicators is based on statistical data HAKOM collects from all authorized operators quarterly. In certain cases, HAKOM cannot observe irregularities in reports/data until several consequent periods are compared. As a result, HAKOM emphasizes that minor discrepancies from actual data are possible. Also, the values of individual indicators in this report may deviate from the previously published values due to corrections and/or subsequently submitted reports by individual operators. HAKOM does not assume responsibility for the quality of data reports delivered by the operators.

Summary: Quarterly Key Data Report Q2 2025

• In the first half of 2025, compared to the same period last year, there was an increase in investments in fixed assets in both the fixed and mobile networks. As expected, investments in VHCN networks increased the most, with almost EUR 60 million invested in them in the first half of 2025.

• In the first half of 2025, total revenues from services in the electronic communications market amounted to EUR 900 million, an increase of 5.87 percent compared to the same period last year. Revenues from mobile networks services are 5.10 percent higher, and revenues from fixed networks are 8.05 percent higher

• In the second quarter of 2025, the migration of subscribers to fiber networks continued, resulting in an increase of 106,474 fiber broadband lines compared to the previous year, while the copper broadband lines decreased by 68,191. The total number of fiber broadband lines reached 410.206

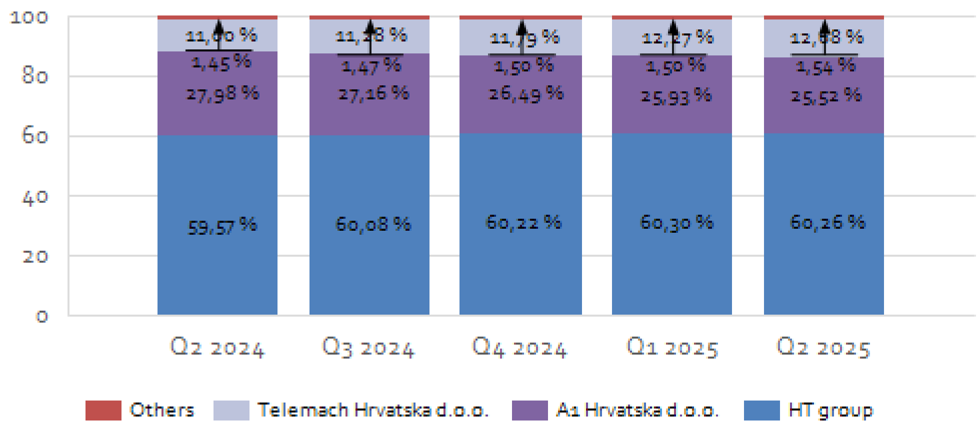
• The number of VHCN broadband lines reached 565,770, representing 48.53 percent of the total 1,165,879 fixed broadband lines. Moreover, the share of broadband lines with speeds above 100 Mbit/s, regardless of the technology, amounted to 51.26 percent.

• The trend of declining revenue and outgoing traffic in landline telephone service continues, with a stable number of users and connections, suggesting a gradual decrease in the use of this service despite a consistent user base. At the same time, revenue from the mobile telephone service remains almost stable compared to the same period last year, although a slight decline in revenue from private and business users is noted due to the shift to data and OTT services. Concurrently, the reduction in SMS/MMS traffic and roaming minutes of own users confirms the ongoing replacement of traditional communication habits with digital applications.

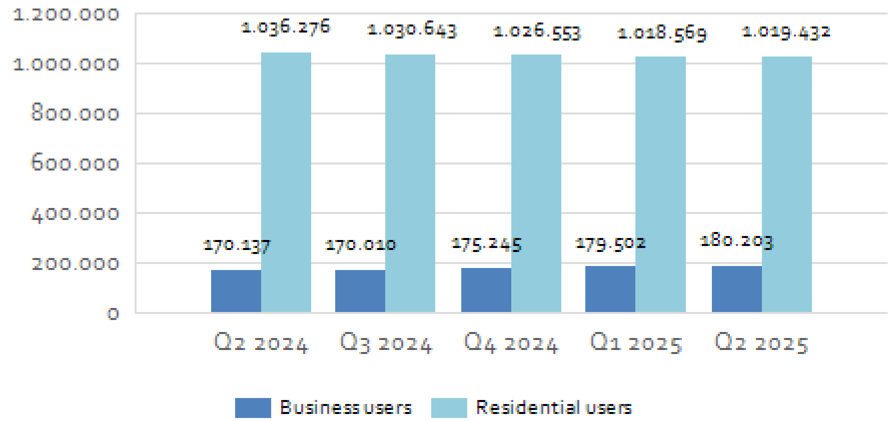
• Revenues from pay-TV services in the second quarter of 2025 increased to 38.8 million euros, representing a 13 percent rise compared to the previous year. The most significant growth is recorded by the own OTT service, with a revenue increase of 124 percent and a 90 percent rise in the number of connections, reaching 163,189, confirming the accelerated shift of users toward internet-based and OTT solutions. On the other hand, the IPTV service recorded a 1 percent decline in the number of connections, causing its market share to fall below half for the first time, to 49 percent.

Fixed telephony services	Q2 2025	% Change Q2 2025 - Q1 2025	% Change Q2 2025 - Q2 2024
Total fixed telephony services revenue	26.702.879,70€	-2,92 %	-10,65 %
Retail revenue	24.989.509,65€	-2,67 %	-9,64 %
Wholesale revenue	1.713.370,05€	-6,47 %	-23,19 %
Total number of fixed lines*	1.199.635	0,13 %	-0,56 %
Number of subscribers	1.094.615	0,01 %	-1,16 %
Fixed originating voice minutes (min)**	193.804.425	-8,03 %	-14,09 %

Fixed telephony service operator's market shares by number of lines

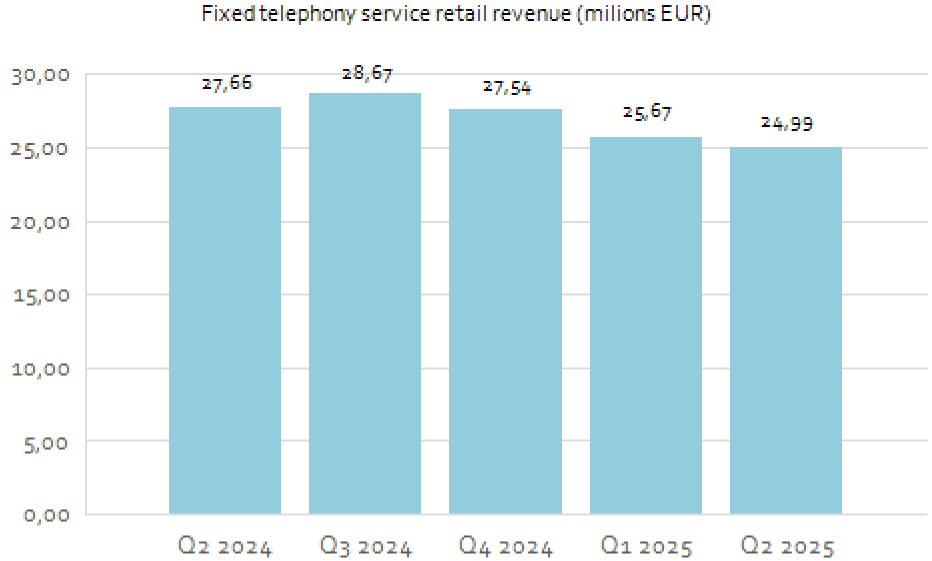


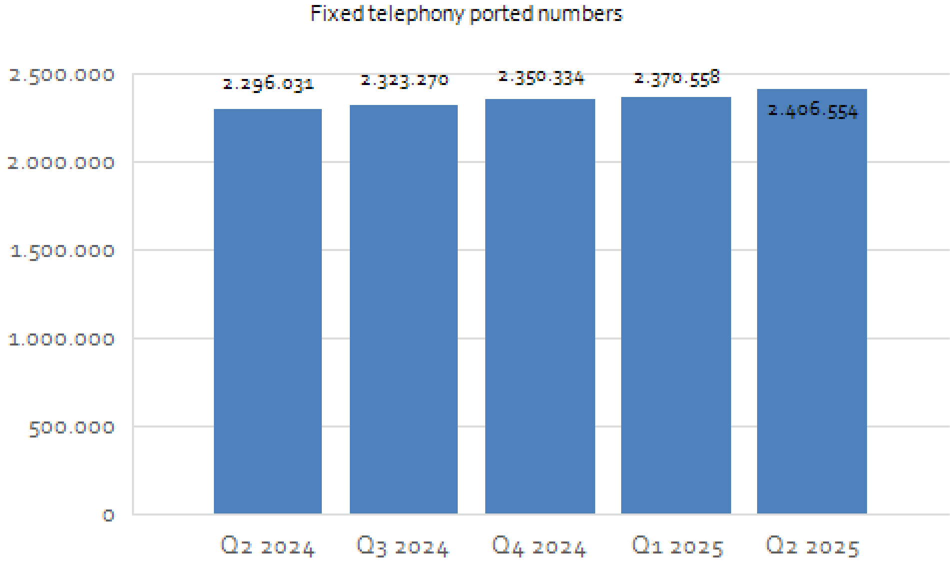
Fixed telephony lines



*CPS (carrier pre-selection) subscribers are included
**Includes all types of calls (local, national, international calls, calls to mobile networks and calls to VAS numbers)

Fixed telephony services - bundles	Q2 2025	% Change Q2 2025 - Q1 2025	% Change Q2 2025 - Q2 2024
Stand-alone – fixed voice telephony subscribers	160.177	-2,47 %	-9,10 %
Number of bundled services subscribers – 2D	253.043	0,05 %	0,48 %
Number of bundled services subscribers – 3D	374.759	0,62 %	2,85 %
Number of bundled services subscribers – 4D	266.691	1,66 %	5,56 %

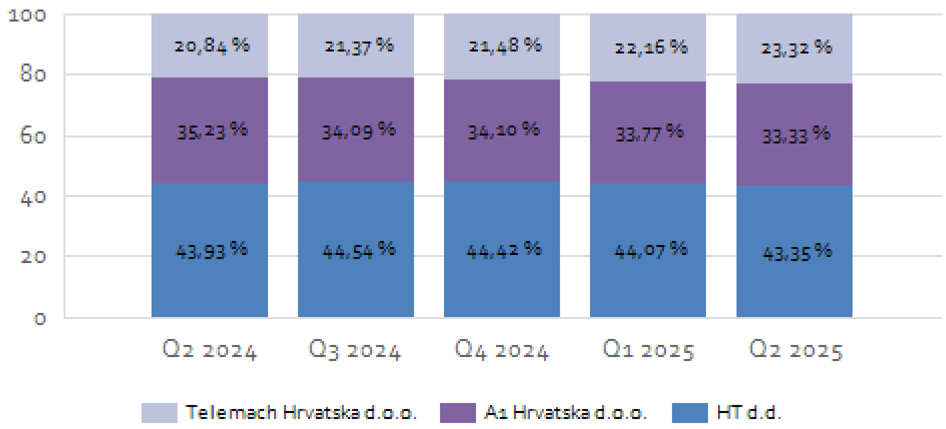




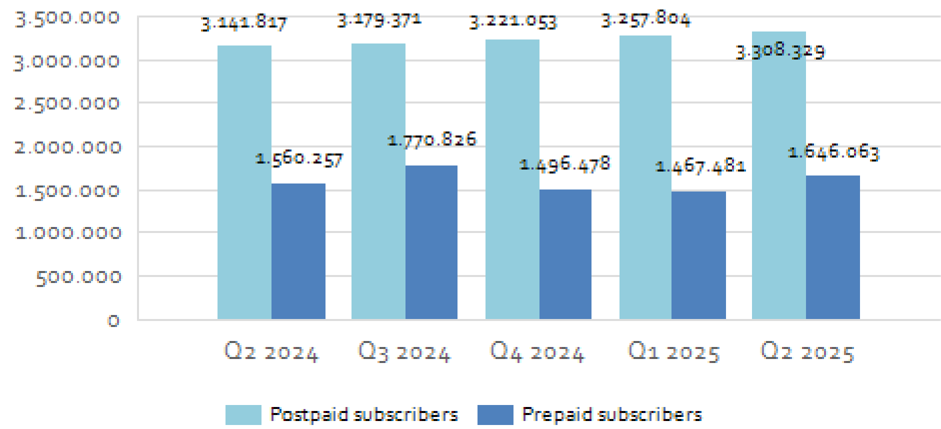
Mobile telephony services	Q2 2025	% Change Q2 2025 - Q1 2025	% Change Q2 2025 - Q2 2024
Total mobile telephony services revenues	**140.371.086,08€**	**-0,95 %**	**-0,15 %**
Retail revenue	**127.496.797,96€**	**-2,14 %**	**1,11 %**
Retail revenue - Residential	79.945.719,39€	-17,21 %	-11,94 %
Prepaid subscribers	14.939.336,66€	-24,23 %	-27,94 %
Postpaid subscribers	65.006.382,73€	-15,41 %	-7,20 %
Retail revenue - Business	28.430.040,76€	-15,68 %	-19,49 %
Wholesale revenue	**12.874.288,12€**	**12,54 %**	**-11,13 %**
Total number of active subscribers (3G, 4G, 5G)*	**4.954.392**	**4,85 %**	**5,37 %**
Residential	4.064.656	5,68 %	5,61 %
Prepaid subscribers	1.646.063	12,17 %	5,50 %
Postpaid subscribers	2.418.593	1,68 %	5,69 %
Business	889.736	1,20 %	4,26 %
Mobile penetration**	127,96 %	4,85 %	5,37 %
Mobile originating voice minutes (min)***	2.677.128.097	2,84 %	-2,53 %
International roaming traffic - own subscribers (min)	99.185.687	-5,87 %	-20,14 %
International roaming traffic - foreign subscribers (min)	210.623.139	184,88 %	-10,10 %
Total SMS sent	164.369.299	-6,40 %	-19,88 %
Total MMS sent	1.205.615	-3,88 %	-13,28 %

*Definition of active pre-paid subscriber: Subscriber who has used a mobile service or refilled the account in the last 90 days
**Mobile penetration has been calculated according to the last census of population from 2021
***Includes all types of calls (local, national, international calls, calls to mobile networks and calls to VAS numbers)

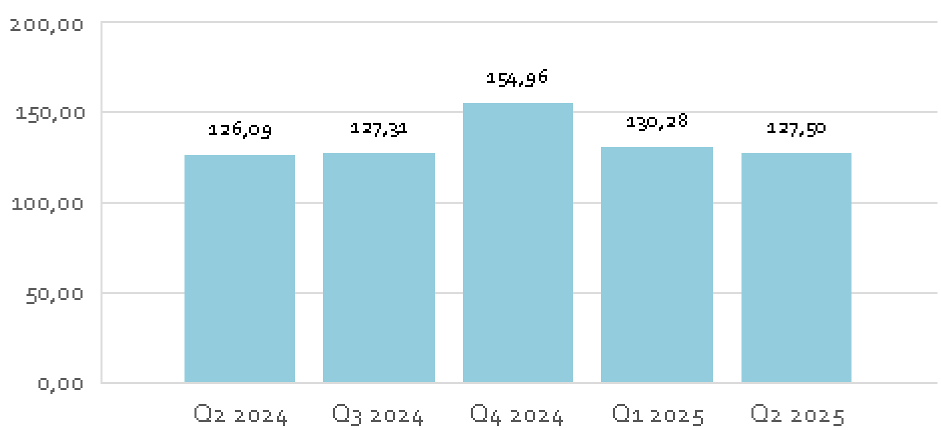
Mobile telephony operator's market shares by number of subscribers



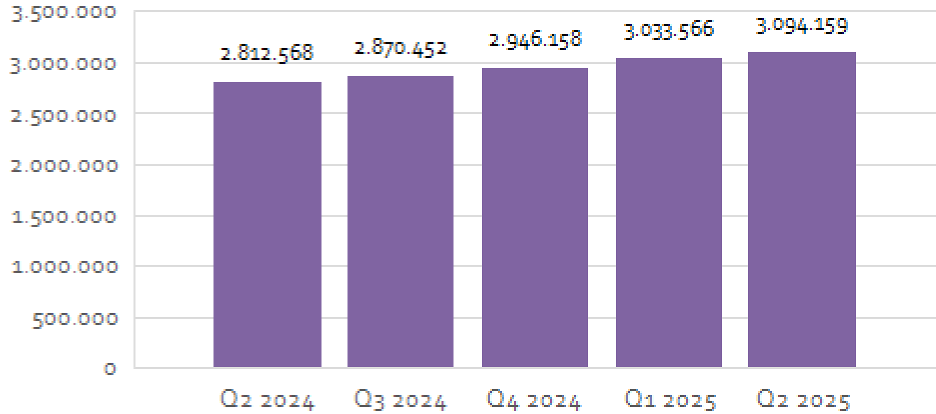
Mobile telephony service number of subscribers by quarter



Mobile telephony service retail revenue (milions EUR)

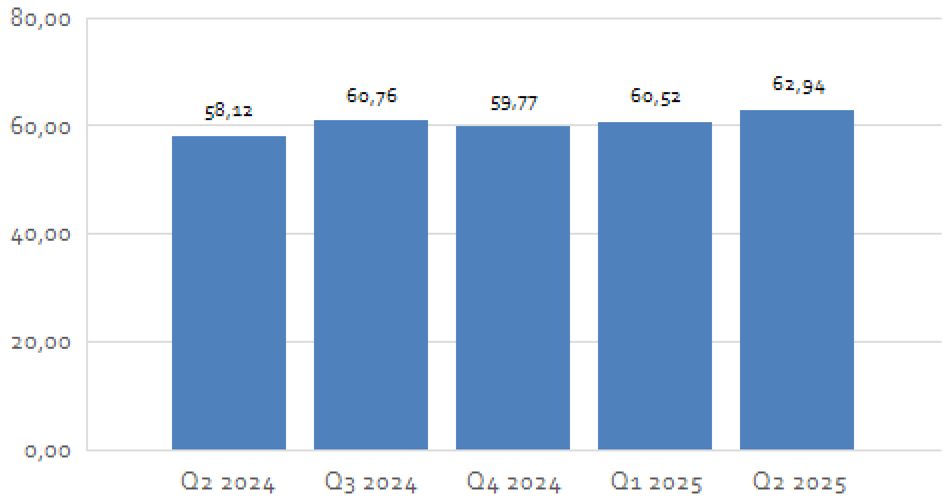


Mobile telephony ported numbers

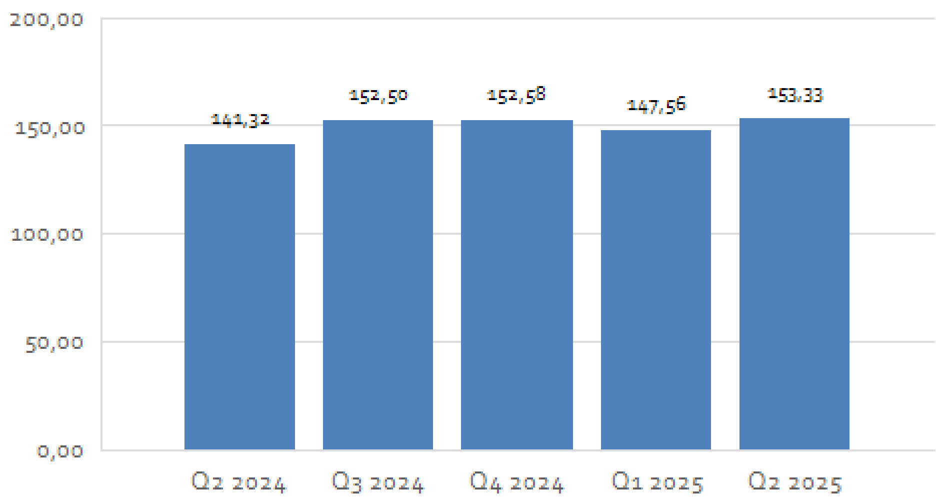


Internet access service (retail level) - revenues and total subscriptions	Q2 2025	% Change Q2 2025 - Q1 2025	% Change Q2 2025 - Q2 2024
Total broadband Internet access services revenues	**217.386.445,60€**	**4,11 %**	**8,68 %**
Fixed broadband Internet access service revenue	62.944.674,78€	4,00 %	8,29 %
Mobile broadband Internet access service revenue	153.333.517,36€	3,91 %	8,50 %
Satellite access revenue	1.108.253,46€	52,07 %	86,80 %
Total number of broadband subscriptions (lines)	**7.161.119**	**3,83 %**	**5,27 %**

Fixed broadband Internet access service retail revenues (milions EUR)



Mobile broadband Internet access service retail revenues (milions EUR)

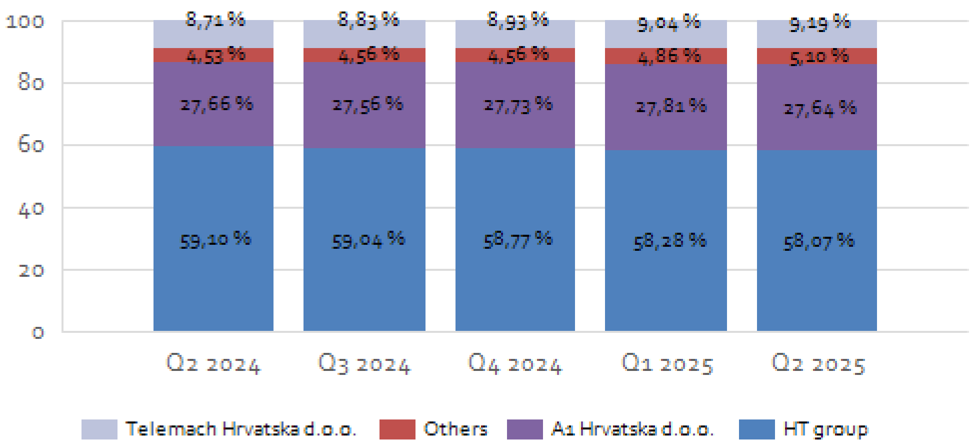


Internet access services (retail level) - fixed broadband network	Q2 2025	% Change Q2 2025 - Q1 2025	% Change Q2 2025 - Q2 2024
Fixed broadband Internet access service subscriptions (lines)*	**1.165.063**	**0,70 %**	**2,61 %**
Copper access network	529.126	-3,50 %	-11,42 %
Access over own copper access network	419.373	-3,63 %	-11,30 %
xDSL based broadband using full local-loop unbundling	28.641	-6,69 %	-21,74 %
xDSL based broadband using shared access	2	-50,00 %	-81,82 %
Bitstream access over copper access network (xDSL)	81.110	-1,64 %	-7,74 %
Fiber optic access network	409.440	6,70 %	34,80 %
Accesss over own fiber access network	305.637	4,44 %	15,56 %
Fiber unbundling access	55.125	8,87 %	217,58 %
Bitstream access over fiber optic access network	48.678	20,34 %	122,40 %
Cable access network	156.209	-2,91 %	-9,04 %
Fixed wireless access (FWA)	54.045	6,43 %	4,72 %
Satellite access	7.274	59,83 %	150,14 %
High Quality Access	8.969	3,40 %	10,06 %
Fixed broadband traffic (TB)	1.013.974	1,14 %	26,09 %

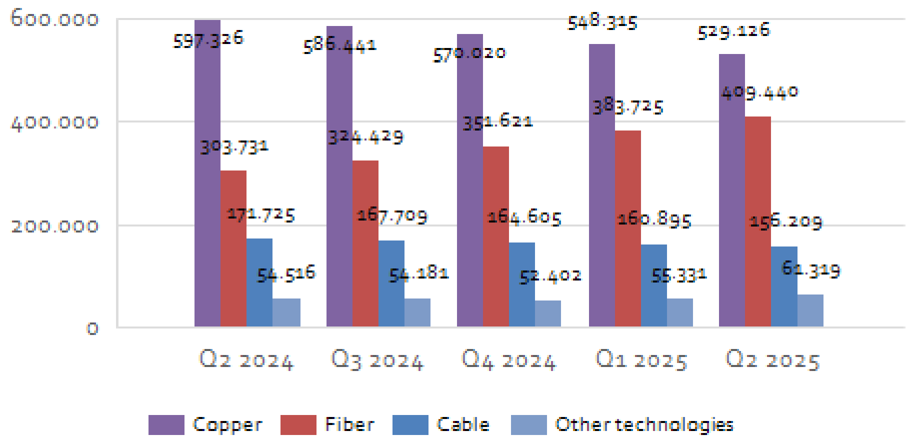
*Broadband access service at fixed location via mobile network is not included - it is included in the mobile broadband table.

Internet access services (retail level) - bundles	Q2 2025	% Change Q2 2025 - Q1 2025	% Change Q2 2025 - Q2 2024
Number of standalone internet access service subscribers	4.946.068	4,63 %	5,00 %
Number of bundled services subscribers – 2D	406.076	0,21 %	0,34 %
Number of bundled services subscribers – 3D	434.966	0,59 %	2,95 %
Number of bundled services subscribers – 4D	266.691	1,66 %	5,56 %

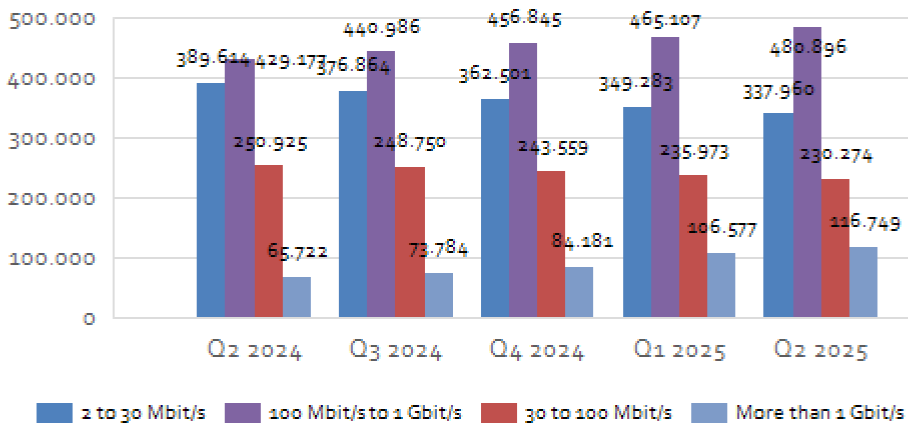
Fixed broadband Internet access service operator's market shares by number of lines



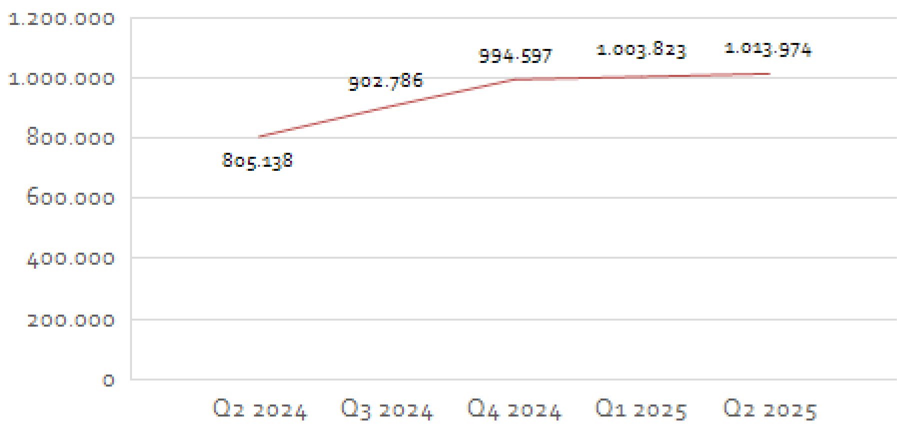
Fixed broadband Internet access service by technologies



Fixed broadband Internet access service by download speeds



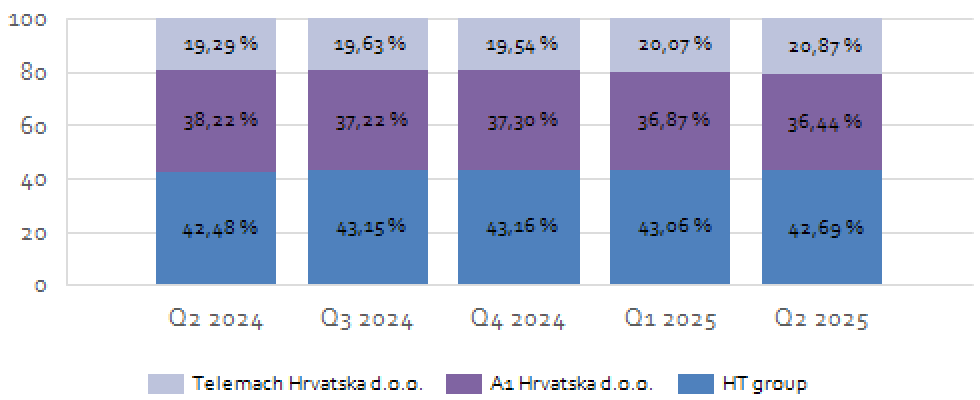
Total fixed broadband data traffic (TB)



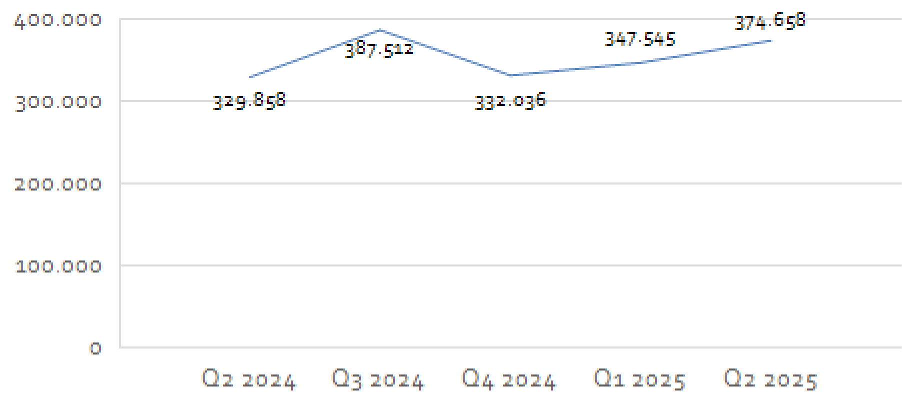
Internet access services (retail level) - mobile broadband network	Q2 2025	% Change Q2 2025 - Q1 2025	% Change Q2 2025 - Q2 2024
Mobile broadband Internet acccess service subscriptions (3G, 4G, 5G etc)*	**5.996.056**	**4,46 %**	**5,81 %**
Residential (3G and 4G)	3.131.109	5,50 %	-2,73 %
Dedicated data subscriptions (cards/modems/keys etc.)	143.530	-0,56 %	-21,84 %
*Mobile phones**	2.830.291	6,20 %	-0,51 %
M2M	5	0,00 %	150,00 %
Broadband access at fixed location via mobile network	157.283	-0,78 %	-17,42 %
Residential (5G)	1.345.444	4,85 %	27,51 %
Dedicated data subscriptions (cards/modems/keys etc.)	62.562	2,38 %	113,91 %
Mobile phones	1.235.191	4,51 %	22,94 %
M2M	0	NA	NA
Broadband access at fixed location via mobile network	47.691	18,64 %	124,84 %
Business (3G and4G)	1.107.352	0,77 %	0,27 %
Dedicated data subscriptions (cards/modems/keys etc.)	129.789	1,36 %	-1,25 %
Mobile phones	572.105	-0,30 %	-8,41 %
M2M	361.043	2,30 %	20,11 %
Broadband access at fixed location via mobile network	44.415	0,83 %	-6,89 %
Business (5G)	412.151	5,61 %	42,79 %
Dedicated data subscriptions (cards/modems/keys etc.)	29.325	9,14 %	39,50 %
Mobile phones	317.618	4,01 %	38,86 %
M2M	61.338	12,28 %	66,64 %
Broadband access at fixed location via mobile network	3.870	13,82 %	85,61 %
Mobile broadband traffic (TB)	374.658	7,80 %	13,58 %

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

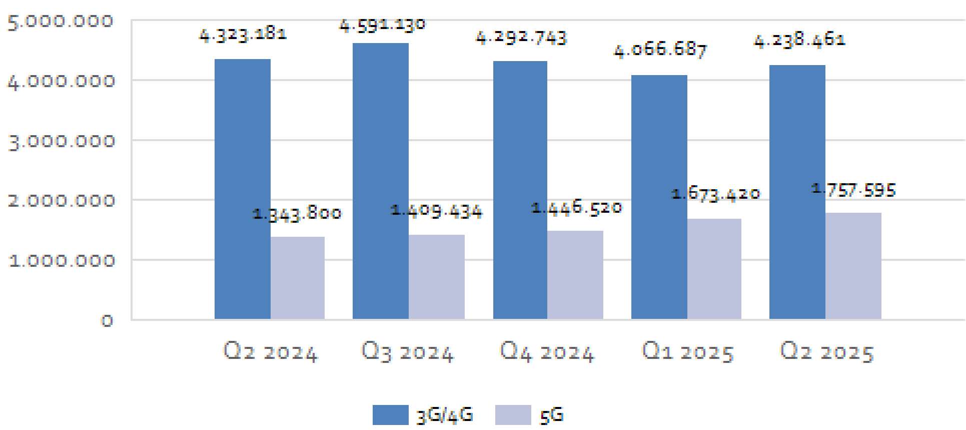
Mobile broadband Internet access service operator's market shares by number of subscriptions



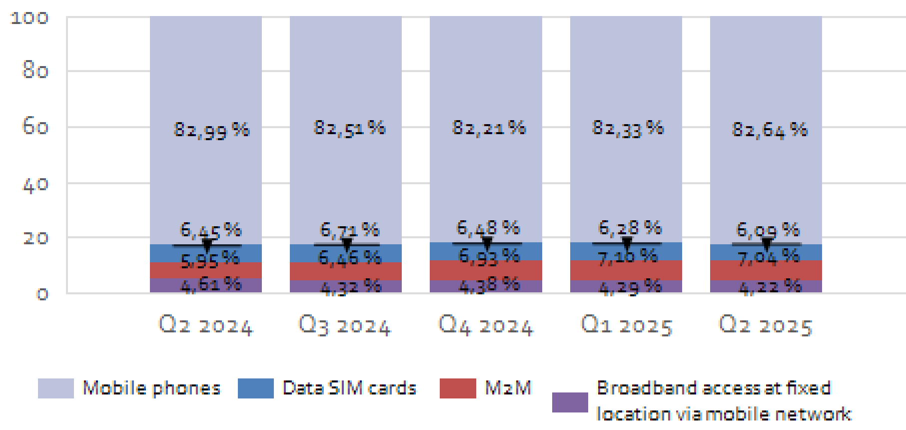
Total mobile broadband data traffic (TB)



Mobile broadband Internet access service subsriptions by technologies

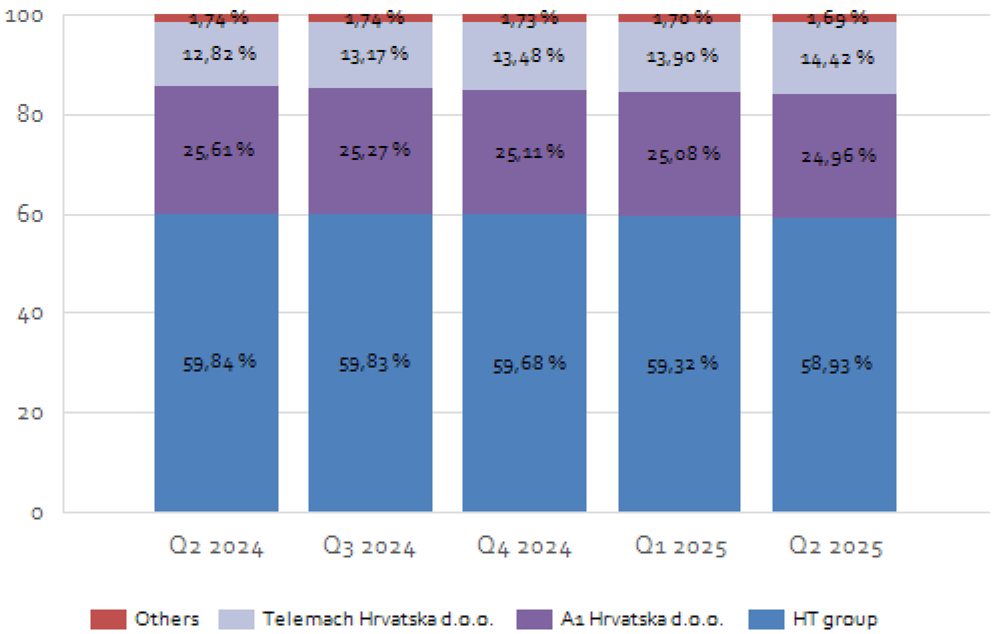


Mobile broadband Internet access service subscriptions by type of access

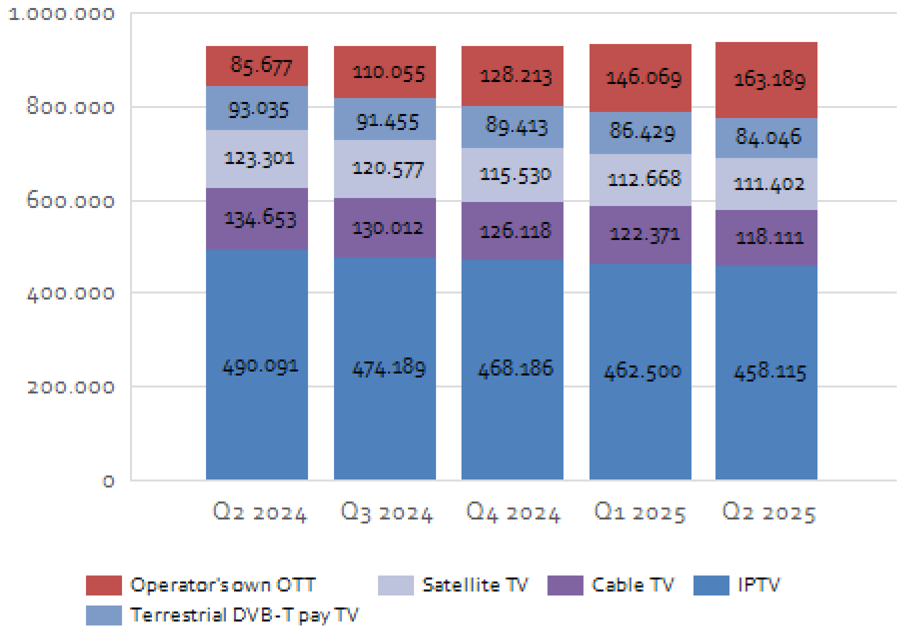


Television services	Q2 2025	% Change Q2 2025 - Q1 2025	% Change Q2 2025 - Q2 2024
Television services revenues	**38.769.096,97€**	**5,53 %**	**12,51 %**
Cable TV revenue	6.068.343,23€	15,52 %	10,73 %
IPTV revenue	21.340.636,73€	2,26 %	6,69 %
Satellite TV revenue	3.907.307,26€	1,66 %	-1,87 %
Digital terrestrial TV revenue	3.136.937,99€	-0,46 %	2,30 %
Own OTT service revenue	4.315.871,76€	19,23 %	123,84 %
Total number of pay-TV subscriptions (lines)	**934.863**	**0,52 %**	**0,87 %**
Cable reception	118.111	-3,48 %	-12,28 %
Residential	114.926	-3,51 %	-12,35 %
Business	3.185	-2,51 %	-9,90 %
IPTV	458.115	-0,95 %	-6,52 %
Residential	431.159	-1,02 %	-6,97 %
Business	26.956	0,17 %	1,28 %
Satellite reception (SAT TV)	111.402	-1,12 %	-9,65 %
Residential	102.198	-1,80 %	-9,90 %
Business	9.204	7,09 %	-6,82 %
Digital terrestrial reception – pay TV	84.046	-2,76 %	-9,66 %
Residential	83.090	-2,79 %	-9,72 %
Business	956	-0,10 %	-4,40 %
Own OTT service	163.189	11,72 %	90,47 %
Residential	152.106	12,03 %	97,70 %
Business	11.083	7,65 %	26,82 %

Pay TV operator's market shares by number of subscriptions

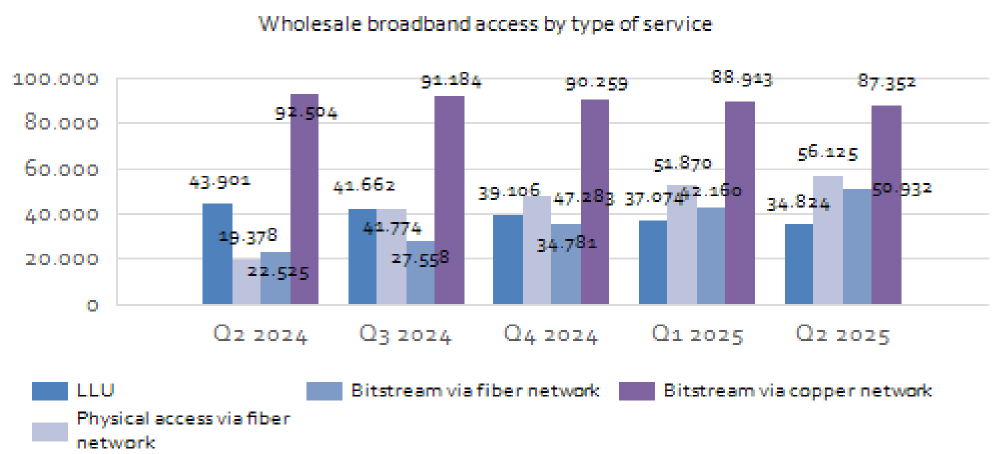


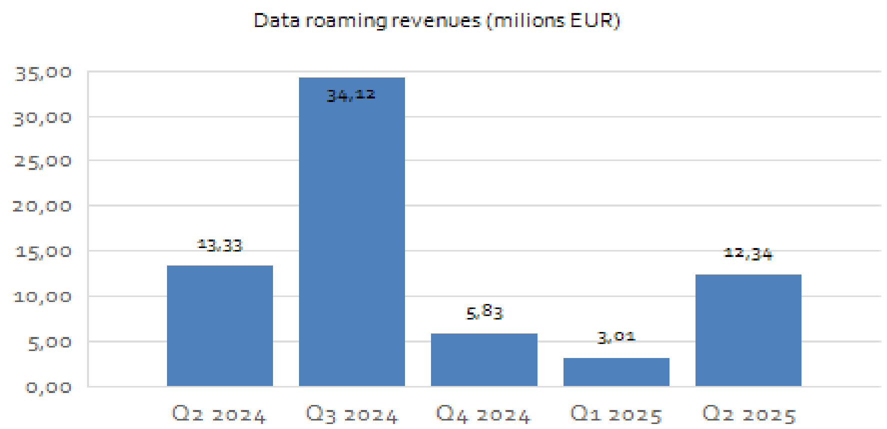
Pay TV subscriptions by technologies



Television services - bundles	Q2 2025	% Change Q2 2025 - Q1 2025	% Change Q2 2025 - Q2 2024
Stand-alone – TV subscribers	280.133	-0,60 %	5,57 %
Number of bundled services subscribers – 2D	79.217	-0,74 %	-7,17 %
Number of bundled services subscribers – 3D	317.896	0,71 %	4,30 %
Number of bundled services subscribers – 4D	266.691	1,66 %	5,56 %

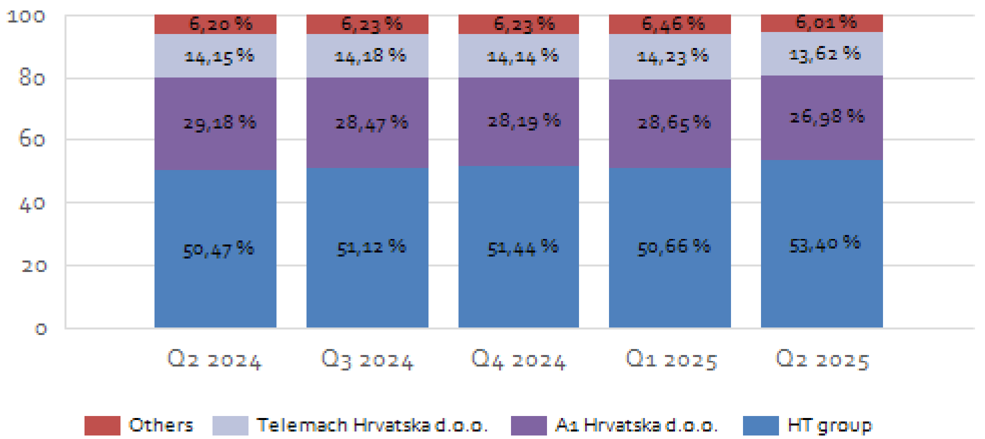
Wholesale broadband access	Q2 2025	% Change Q2 2025 - Q1 2025	% Change Q2 2025 - Q2 2024
Wholesale broadband access services via copper network revenues	3.022.869,59€	-2,44%	-9,39 %
Wholesale broadband access services via fiber network revenues	3.273.765,72€	13,78 %	162,50 %
Data roaming revenues	12.342.285,27€	309,88 %	-7,41 %
Physical wholesale access viacopper network(LLU)-number ofl ines	34.824	-6,07 %	-20,68 %
Bitstream wholesale access via copper network-number of lines	87.352	-1,76 %	-5,57 %
Physical wholesale access via fiber network (unbundled fiber at distribution node) - number of lines	55.761	7,50 %	187,75 %
Bitstream wholesale access via fiber networks - number of lines	50.932	20,81 %	126,11 %



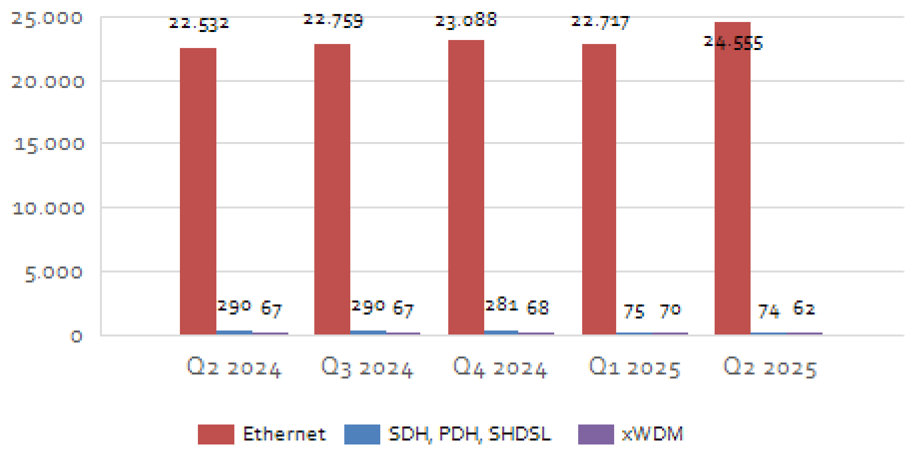


Dedicated capacity services (high-quality access) - retail level*	Q2 2025	% Change Q2 2025 - Q1 2025	% Change Q2 2025 - Q2 2024
Traditional digital lines (SDH, PDH, (S)HDSL revenue	97.803,74€	-0,72 %	-65,10 %
Ethernet technology services revenue	7.846.136,92€	0,93 %	24,16 %
xWDM technology services revenue	372.558,21€	-4,44 %	0,01 %
"Dark fiber" services revenue	439.221,73€	-4,01 %	1,16 %
Total number of connection points of traditional digital lines (SDH, PDH, (S)HDSL)	74	-1,33 %	-74,48 %
Total number of Ethernet technology connection points	24.555	8,09 %	8,98 %
Total number of xWDM technology connection points	62	-11,43 %	-7,46 %
Total length of fiber as a part of "dark fiber" service (km)	4.763	-4,95 %	-5,76 %

Dedicated capacity market operator's shares by number of connection points*



Dedicated capacity market connection points by technologies*



*From Q3 2024, the report no longer includes data from the operator HEP Telekomunikacije d.o.o., which provides services exclusively to companies within the HEP Group.

Shared use of electronic communications infrastructure	Q2 2025	% Change Q2 2025 - Q1 2025	% Change Q2 2025 - Q2 2024
Cable duct system shared use revenue	1.295.042,43€	45,59 %	-3,09 %
Poles for installation of aerial network cables rental revenue	55.853,56€	13,37 %	219,74 %
Colocation spaces rental revenue	681.212,05€	3,69 %	4,42 %
Total length of shared use cable duct systems (km)	26.116	5,34 %	33,02 %
Pipes length, 63-110 mm diameter (km)	6.575	NA	NA
Pipes length, 50 mm diameter (km)	1.495	116,04 %	NA
Pipes length, 20-40 mm diameter (km)	6.699	0,74 %	8,31 %
Pipes length, 3-16 mm diameter (km)	11.347	-1,74 %	-15,62 %
Total number of rented poles for the installation of aerial network cables	5.734	5,66 %	43,64 %