



Croatian quarterly electronic communications market data for 1. 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 Q1 2025

- In the first quarter of 2025, compared to the previous year, a total increase in investment of 25.8 percent was recorded, while the growth of investment in fixed networks was as much as 30 percent. In this period of 2025, total revenues from services on the electronic communications market amounted to EUR 440,919,469 million, which is an increase of 7.1 percent compared to 2024. Revenues from mobile communications services increased by 6.65 percent, and revenues from fixed communications services increased by 8 percent.
- In the first quarter of 2025, the fiber broadband lines increased by 99,781 compared to the previous year, while the copper broadband lines decreased by 70,628. The total number of the fiber broadband lines reached 382,890.
- The number of VHCN broadband lines reached 543,129, accounting for 46.98 percent of the total 1,156,044 broadband Internet access lines. Moreover, 49.4 percent of these lines offer speeds over 100 Mbit/s, regardless of the technology.
- In Q1 of 2025, total revenues in the pay-TV market increased by 11.57% compared to the same period in the previous year, with the own OTT service segment showing the most significant increase percent-wise, with revenues soaring by 143%. The total number of connections grew by 0.86%, reaching 929,990.
- The distribution of pay-TV connections across different technologies remained largely stable compared to earlier periods, with IPTV connections leading, representing 49.73% of the total. Connections through own OTT services accounted for 15.71%, followed by cable networks at 13.15%, satellite television at 12.11%, and terrestrial pay-TV constituting 9.29% of the market.

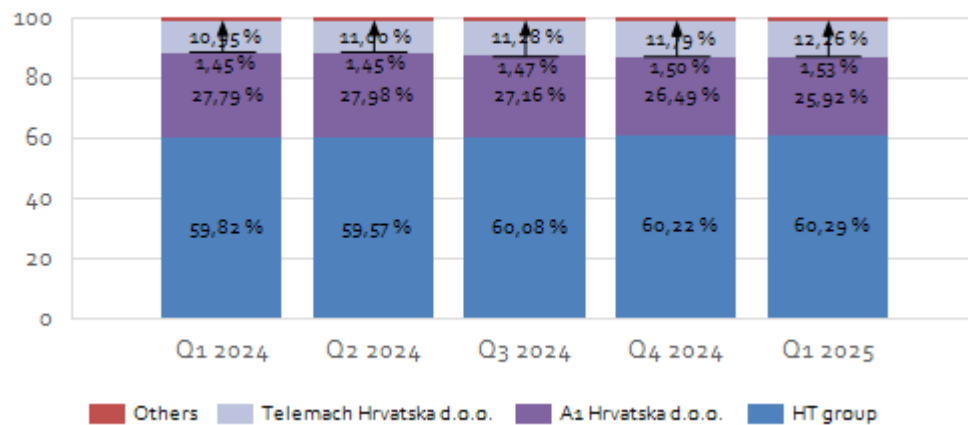


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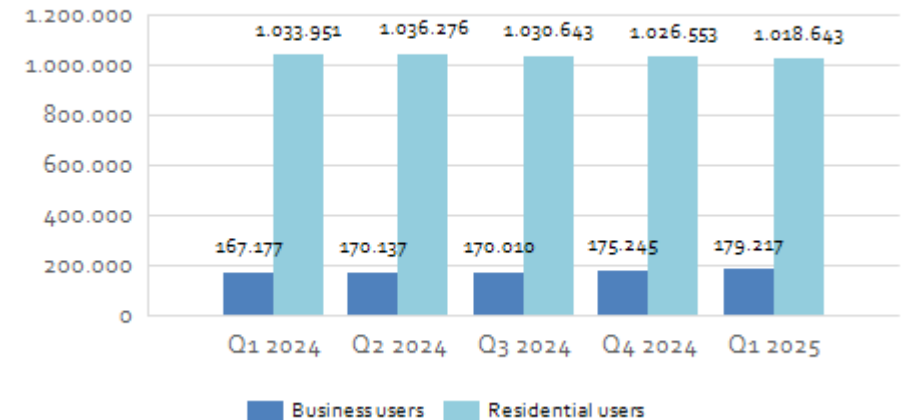
1. Quarter 2025.

Fixed telephony services	Q1 2025	% Change Q1 2025 - Q4 2024	% Change Q1 2025 - Q1 2024
Total fixed telephony services revenue	27.503.604,13€	-7,61 %	-4,83 %
Retail revenue	25.672.166,61€	-6,77 %	-4,97 %
Wholesale revenue	1.831.437,52€	-17,98 %	-2,78 %
Total number of fixed lines*	1.197.860	-0,33 %	-0,27 %
Number of subscribers	1.094.735	-0,63 %	-1,36 %
Fixed originating voice minutes (min)**	210.755.245	-2,07 %	-15,82 %

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



Fixed telephony lines



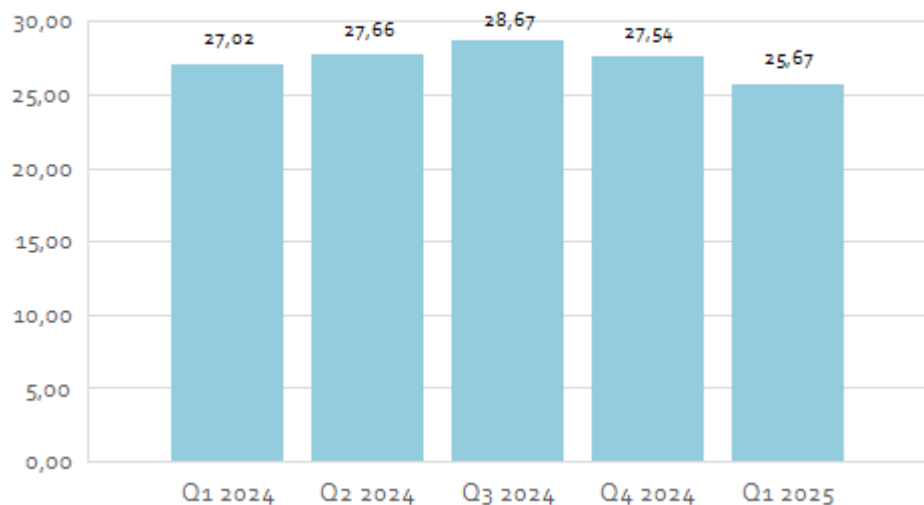
*CPS (carrier pre-selection) subscribers are included

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

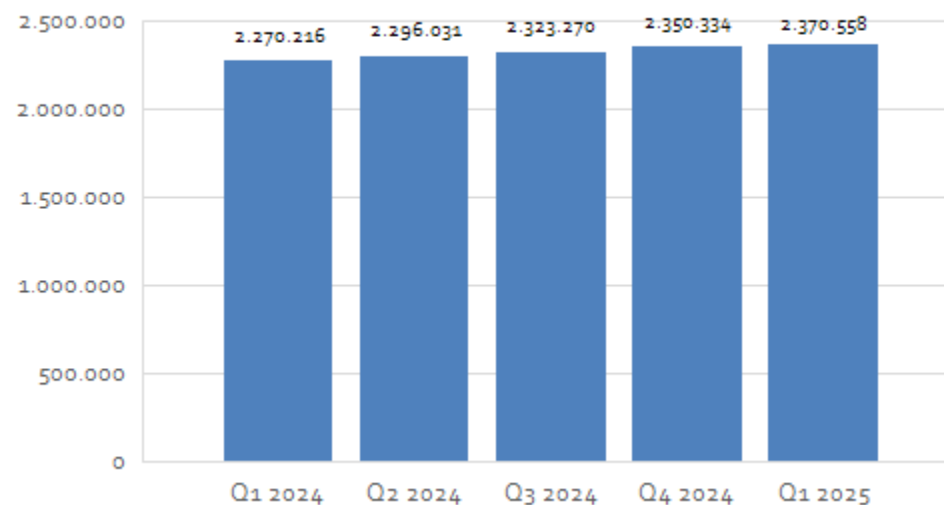


Fixed telephony services - bundles	Q1 2025	% Change Q1 2025 - Q4 2024	% Change Q1 2025 - Q1 2024
Stand-alone – fixed voice telephony subscribers	163.762	-2,84 %	-8,86 %
Number of bundled services subscribers – 2D	253.360	-0,34 %	2,53 %
Number of bundled services subscribers – 3D	372.443	0,54 %	2,97 %
Number of bundled services subscribers – 4D	262.347	1,34 %	5,47 %

Fixed telephony service retail revenue (millions EUR)



Fixed telephony ported numbers





Mobile telephony services	Q1 2025	% Change Q1 2025 - Q4 2024	% Change Q1 2025 - Q1 2024
Total mobile telephony services revenues	141.728.755,93€	-15,59 %	3,61 %
Retail revenue	130.288.985,39€	-15,92 %	4,92 %
<u>Retail revenue - Residential</u>	96.564.614,63€	-15,85 %	7,95 %
<i>Prepaid subscribers</i>	19.716.371,25€	-20,23 %	-2,20 %
<i>Postpaid subscribers</i>	76.848.243,38€	-14,65 %	10,91 %
<u>Retail revenue - Business</u>	33.724.370,75€	-16,11 %	-2,90 %
Wholesale revenue	11.439.770,54€	-11,61 %	-9,28 %
Total number of active subscribers (3G, 4G, 5G)*	4.725.285	0,16 %	3,76 %
Residential	3.846.062	0,02 %	3,58 %
<i>Prepaid subscribers</i>	1.467.481	-1,94 %	0,20 %
<i>Postpaid subscribers</i>	2.378.581	1,27 %	5,78 %
Business	879.223	0,78 %	4,58 %
Mobile penetration**	122,04 %	0,16 %	3,76 %
Mobile originating voice minutes (min)***	2.603.090.047	-4,94 %	-2,90 %
International roaming traffic - own subscribers (min)	105.369.486	-5,04 %	-17,82 %
International roaming traffic - foreign subscribers (min)	73.932.706	-32,44 %	-13,14 %
Total SMS sent	175.617.538	-8,46 %	-14,56 %
Total MMS sent	1.254.222	-11,22 %	0,11 %

*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

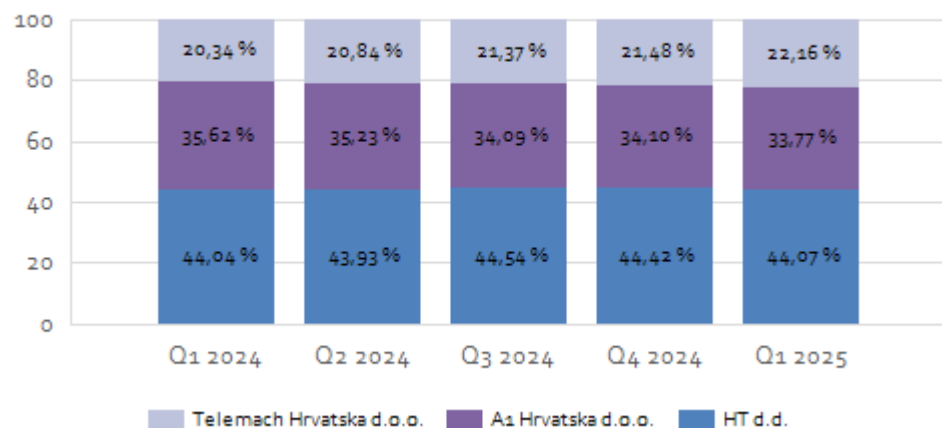
***Includes all types of calls (local, national, international calls, calls to mobile networks and calls to VAS numbers)



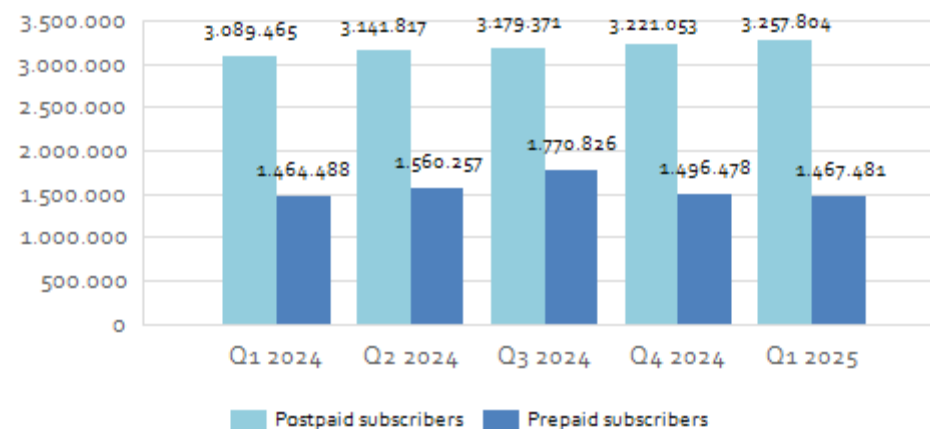
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1. Quarter 2025.

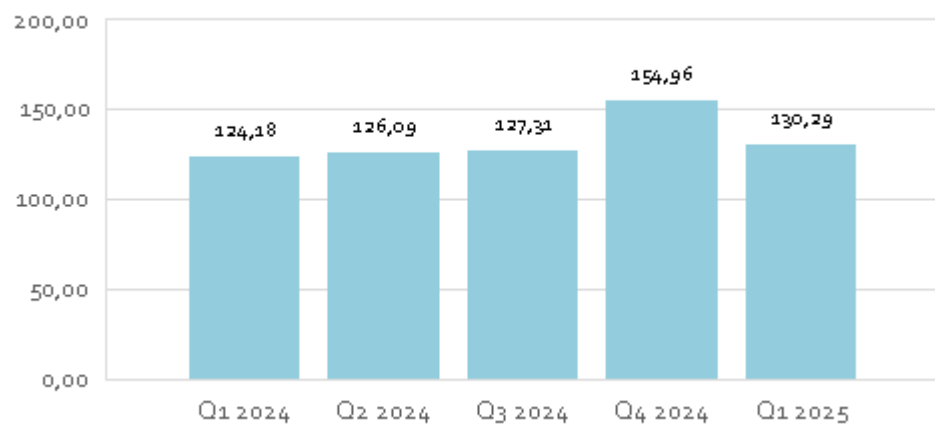
Mobile telephony operator's market shares by number of subscribers



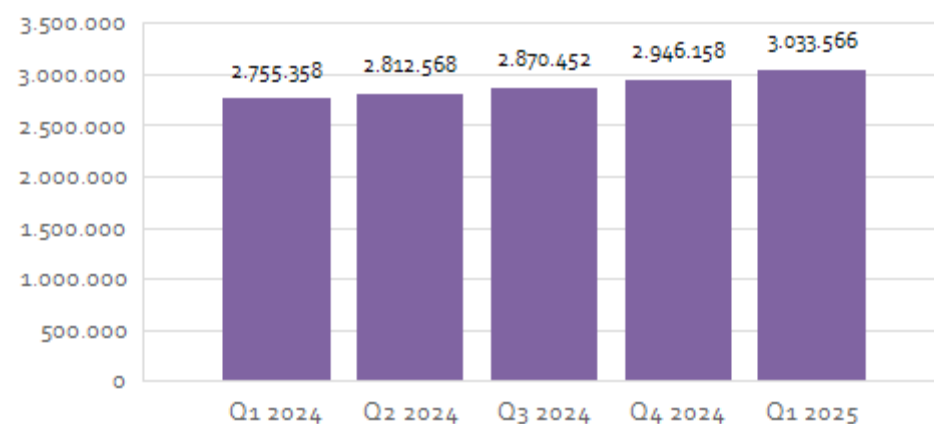
Mobile telephony service number of subscribers by quarter

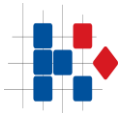


Mobile telephony service retail revenue (millions EUR)



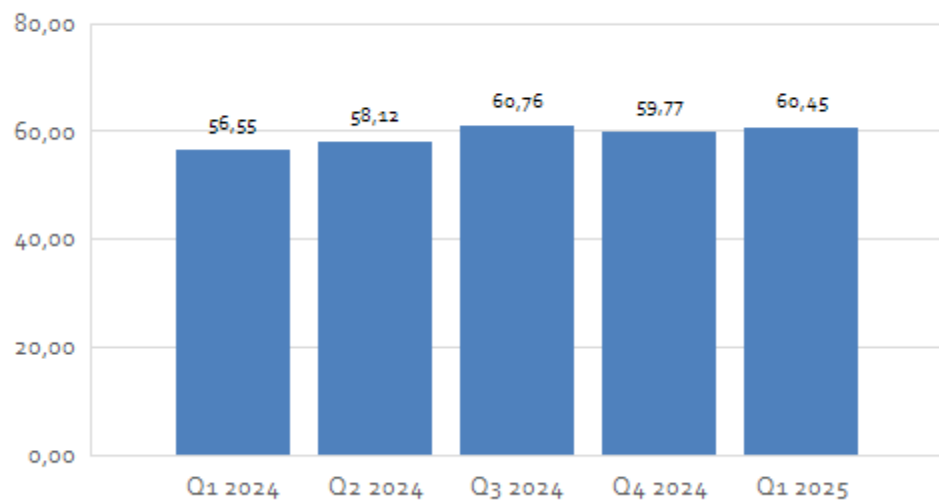
Mobile telephony ported numbers



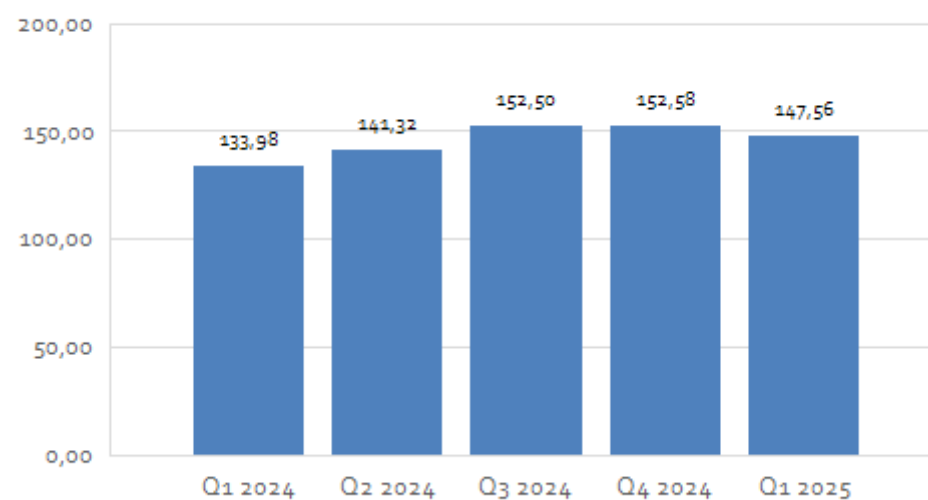


Internet access service (retail level) - revenues and total subscriptions	Q1 2025	% Change Q1 2025 - Q4 2024	% Change Q1 2025 - Q1 2024
Total broadband Internet access services revenues	208.737.400,05€	-2,01 %	9,42 %
Fixed broadband Internet access service revenue	60.446.472,32€	1,13 %	6,88 %
Mobile broadband Internet access service revenue	147.562.131,75€	-3,29 %	10,14 %
Satellite access revenue	728.795,98€	11,09 %	199,73 %
Total number of broadband subscriptions (lines)	6.896.151	0,14 %	4,73 %

Fixed broadband Internet access service retail revenues (millions EUR)



Mobile broadband Internet access service retail revenues (millions EUR)





CROATIAN QUARTERLY ELECTRONIC COMMUNICATIONS MARKET DATA

1. Quarter 2025.

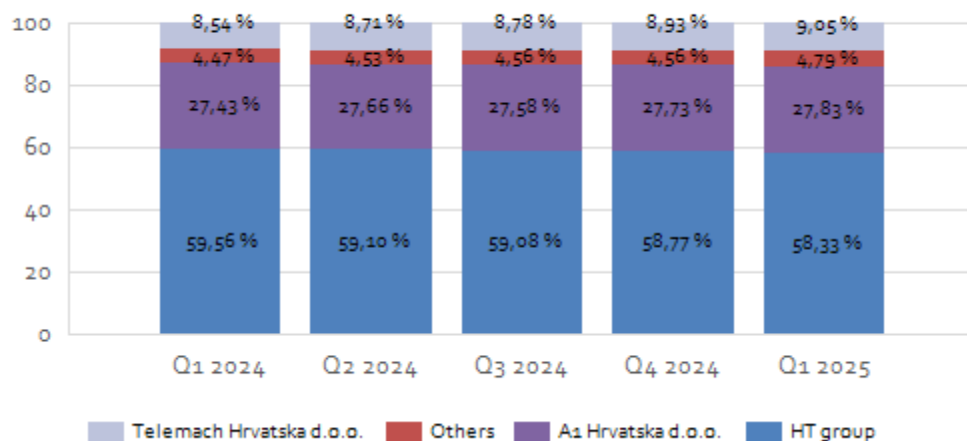
Internet access services (retail level) - fixed broadband network	Q1 2025	% Change Q1 2025 - Q4 2024	% Change Q1 2025 - Q1 2024
Fixed broadband Internet access service subscriptions (lines)*	1.156.044	0,78 %	3,14 %
<u>Copper access network</u>	548.315	-3,81 %	-11,41 %
Access over own copper access network	435.156	-4,00 %	-11,56 %
xDSL based broadband using full local-loop unbundling	30.695	-5,96 %	-23,32 %
xDSL based broadband using shared access	4	100,00 %	100,00 %
Bitstream access over copper access network (xDSL)	82.460	-1,92 %	-5,11 %
<u>Fiber optic access network</u>	382.890	8,89 %	35,24 %
Access over own fiber access network	291.805	6,41 %	17,27 %
Fiber unbundling access	52.252	14,81 %	198,74 %
Bitstream access over fiber optic access network	38.833	21,83 %	131,45 %
<u>Cable access network</u>	160.895	-2,25 %	-6,52 %
<u>Fixed wireless access (FWA)</u>	50.719	4,37 %	38,22 %
<u>Satellite access</u>	4.551	19,61 %	118,69 %
<u>High Quality Access</u>	8.674	2,80 %	9,55 %
<u>Fixed broadband traffic (TB)</u>	1.003.196	0,86 %	28,19 %

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

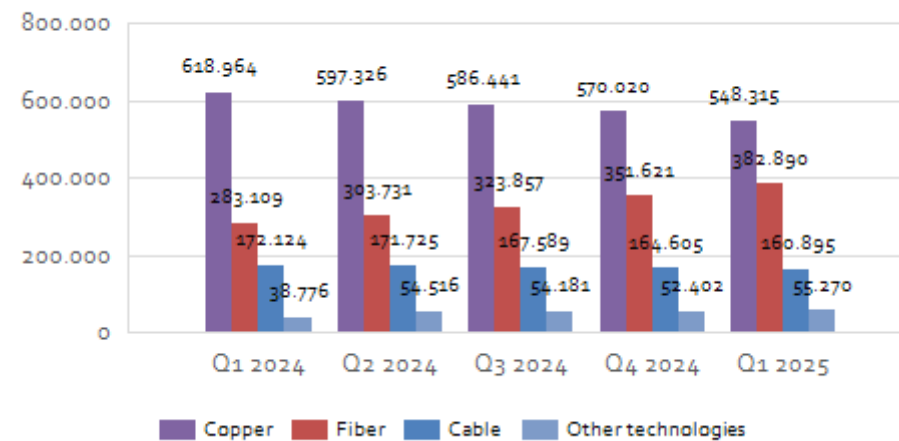
Internet access services (retail level) - bundles	Q1 2025	% Change Q1 2025 - Q4 2024	% Change Q1 2025 - Q1 2024
Number of standalone internet access service subscribers	4.727.843	-0,14 %	4,75 %
Number of bundled services subscribers – 2D	405.662	-0,34 %	2,87 %
Number of bundled services subscribers – 3D	432.435	0,55 %	3,23 %
Number of bundled services subscribers – 4D	262.347	1,34 %	5,47 %



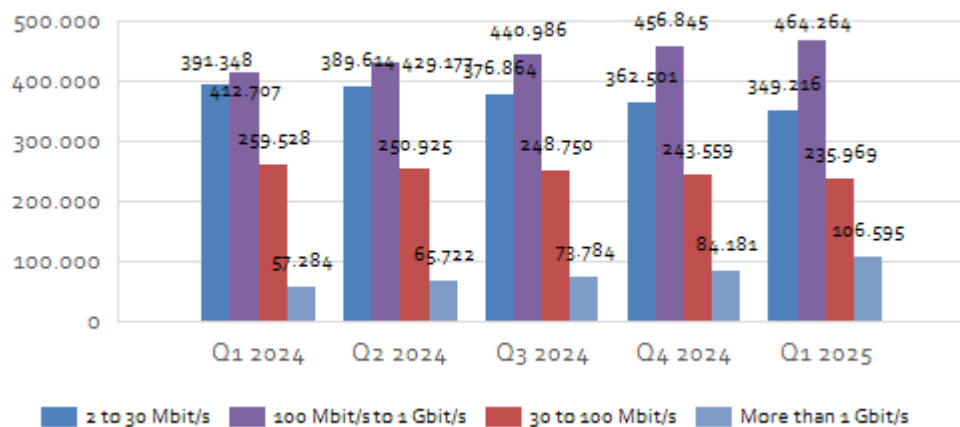
Fixed broadband Internet access service operator's market shares by number of lines



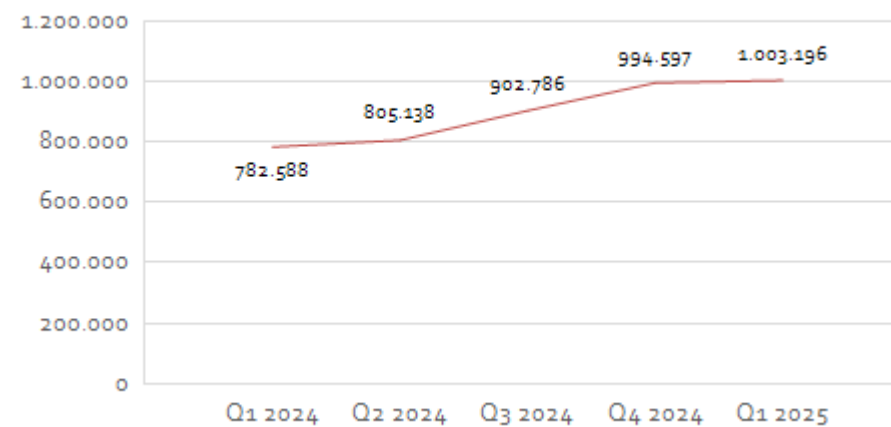
Fixed broadband Internet access service by technologies



Fixed broadband Internet access service by download speeds



Total fixed broadband data traffic (TB)





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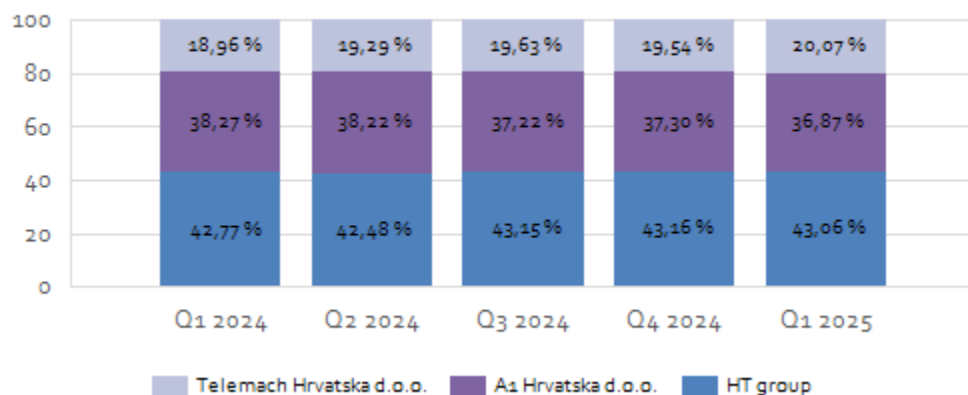
1. Quarter 2025.

Internet access services (retail level) - mobile broadband network	Q1 2025	% Change Q1 2025 - Q4 2024	% Change Q1 2025 - Q1 2024
Mobile broadband Internet access service subscriptions (3G, 4G, 5G etc)*	5.740.107	0,01 %	5,06 %
<u>Residential (3G and 4G)</u>	2.967.832	-5,61 %	-4,63 %
<i>Dedicated data subscriptions (cards/modems/keys etc.)</i>	144.345	-6,67 %	-6,23 %
<i>Mobile phones*</i>	2.664.963	-5,55 %	-3,82 %
<i>M2M</i>	5	-16,67 %	150,00 %
<i>Broadband access at fixed location via mobile network</i>	158.519	-5,74 %	-15,35 %
<u>Residential (5G)</u>	1.283.159	14,67 %	30,92 %
<i>Dedicated data subscriptions (cards/modems/keys etc.)</i>	61.108	2,27 %	166,59 %
<i>Mobile phones</i>	1.181.853	15,39 %	25,32 %
<i>M2M</i>	0	NA	NA
<i>Broadband access at fixed location via mobile network</i>	40.198	14,94 %	184,99 %
<u>Business (3G and 4G)</u>	1.098.855	-4,31 %	-0,33 %
<i>Dedicated data subscriptions (cards/modems/keys etc.)</i>	128.052	-7,37 %	-2,08 %
<i>Mobile phones</i>	573.844	-5,00 %	-7,84 %
<i>M2M</i>	352.910	-2,20 %	17,99 %
<i>Broadband access at fixed location via mobile network</i>	44.049	-2,61 %	-11,82 %
<u>Business (5G)</u>	390.261	19,15 %	45,00 %
<i>Dedicated data subscriptions (cards/modems/keys etc.)</i>	26.869	39,28 %	55,03 %
<i>Mobile phones</i>	305.364	13,79 %	40,03 %
<i>M2M</i>	54.628	48,24 %	71,20 %
<i>Broadband access at fixed location via mobile network</i>	3.400	11,84 %	84,18 %
<u>Mobile broadband traffic (TB)</u>	347.545	4,67 %	-2,06 %

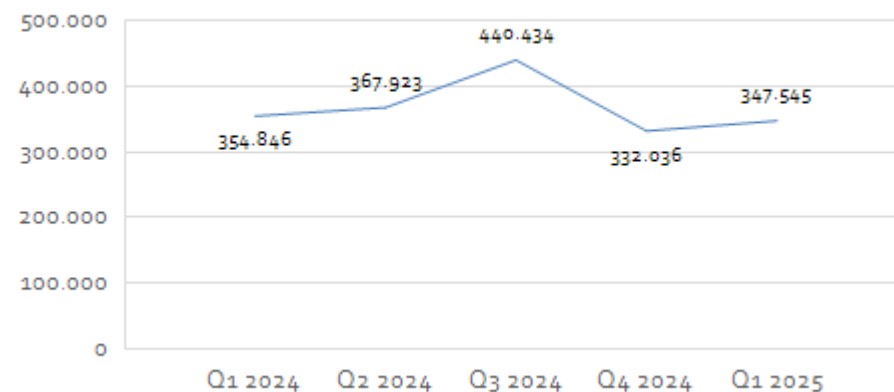
*Number of subscribers which have made an internet mobile connection in the last 90 days through mobile phones



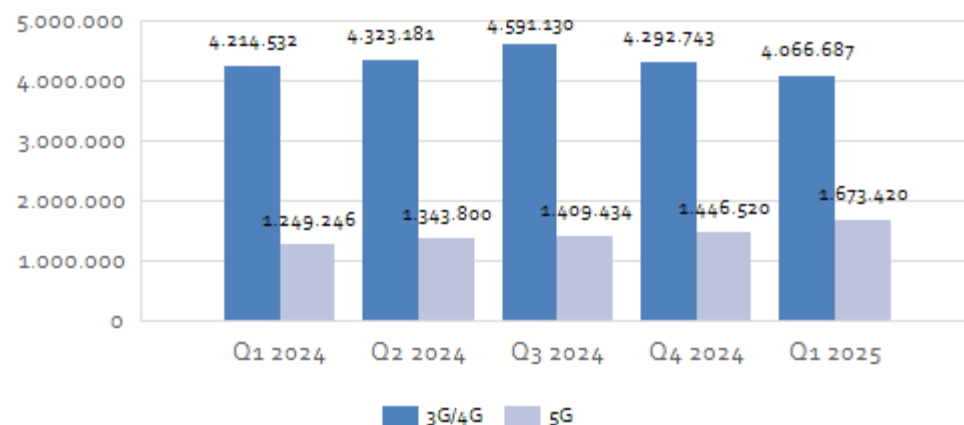
Mobile broadband Internet access service operator's market shares by number of subscriptions



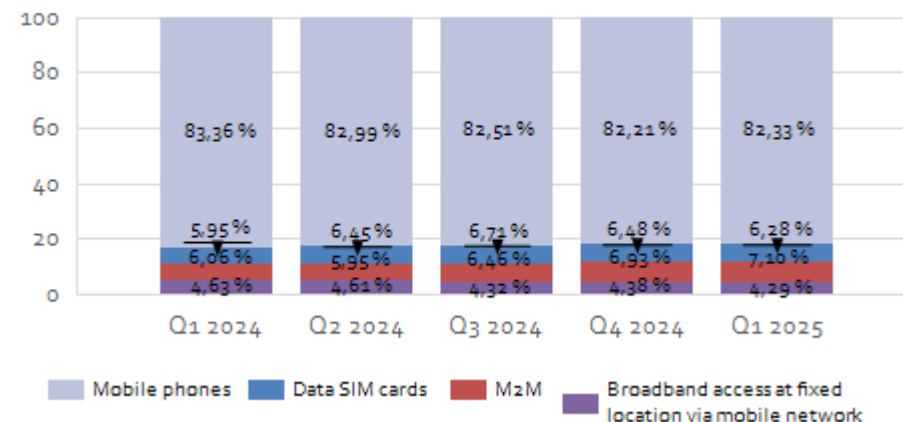
Total mobile broadband data traffic (TB)



Mobile broadband Internet access service subscriptions by technologies



Mobile broadband Internet access service subscriptions by type of access

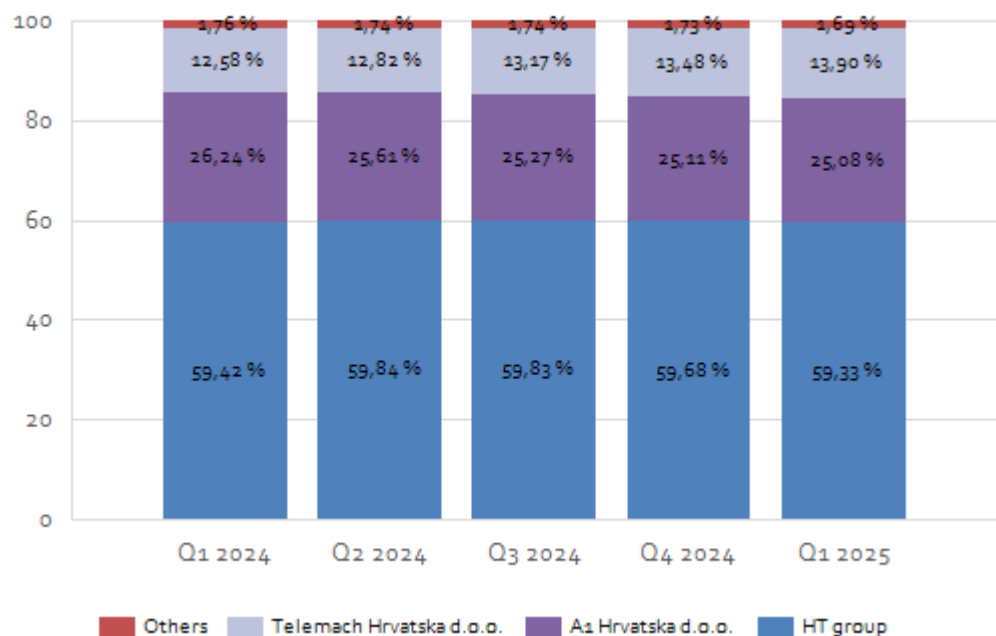




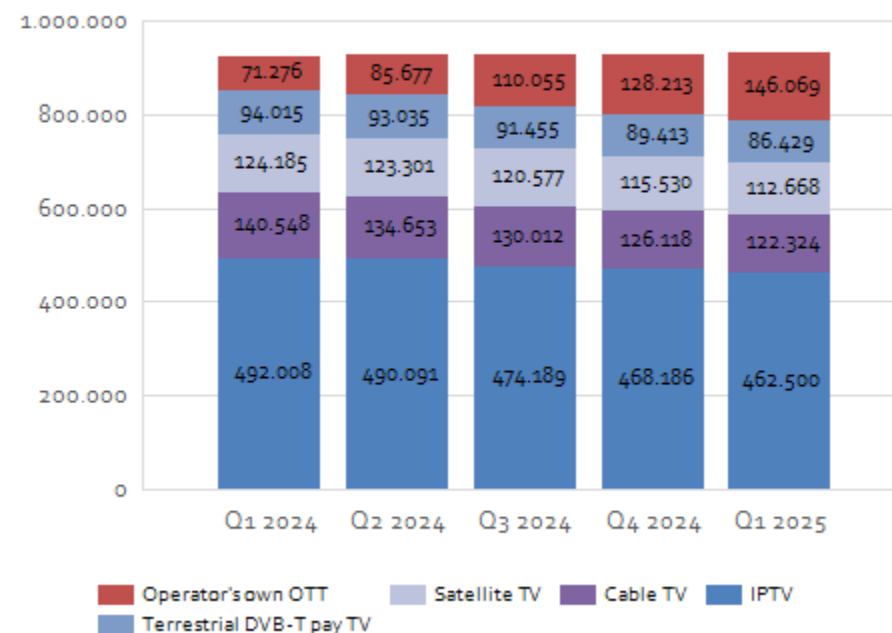
Television services	Q1 2025	% Change Q1 2025 - Q4 2024	% Change Q1 2025 - Q1 2024
Television services revenues	36.737.005,05€	-0,49 %	11,57 %
Cable TV revenue	5.252.960,30€	-8,33 %	8,10 %
IPTV revenue	20.869.407,78€	1,07 %	6,46 %
Satellite TV revenue	3.843.376,21€	-3,68 %	-1,83 %
Digital terrestrial TV revenue	3.151.584,69€	-1,47 %	2,88 %
Own OTT service revenue	3.619.676,07€	8,07 %	143,24 %
Total number of pay-TV subscriptions (lines)	929.990	0,27 %	0,86 %
Cable reception	122.324	-3,01 %	-12,97 %
<i>Residential</i>	119.057	-3,03 %	-13,08 %
<i>Business</i>	3.267	-2,21 %	-8,77 %
IPTV	462.500	-1,21 %	-6,00 %
<i>Residential</i>	435.589	-1,31 %	-6,39 %
<i>Business</i>	26.911	0,31 %	0,77 %
Satellite reception (SAT TV)	112.668	-2,48 %	-9,27 %
<i>Residential</i>	104.073	-2,77 %	-9,64 %
<i>Business</i>	8.595	1,15 %	-4,63 %
Digital terrestrial reception – pay TV	86.429	-3,34 %	-8,07 %
<i>Residential</i>	85.472	-3,35 %	-8,13 %
<i>Business</i>	957	-2,25 %	-2,25 %
Own OTT service	146.069	13,93 %	104,93 %
<i>Residential</i>	135.774	14,55 %	116,38 %
<i>Business</i>	10.295	6,34 %	20,73 %



Pay TV operator's market shares by number of subscriptions



Pay TV subscriptions by technologies



Television services - bundles	Q1 2025	% Change Q1 2025 - Q4 2024	% Change Q1 2025 - Q1 2024
Stand-alone – TV subscribers	281.837	-0,83 %	16,52 %
Number of bundled services subscribers – 2D	79.812	-1,98 %	-6,09 %
Number of bundled services subscribers – 3D	315.655	1,00 %	4,99 %
Number of bundled services subscribers – 4D	262.347	1,34 %	5,47 %

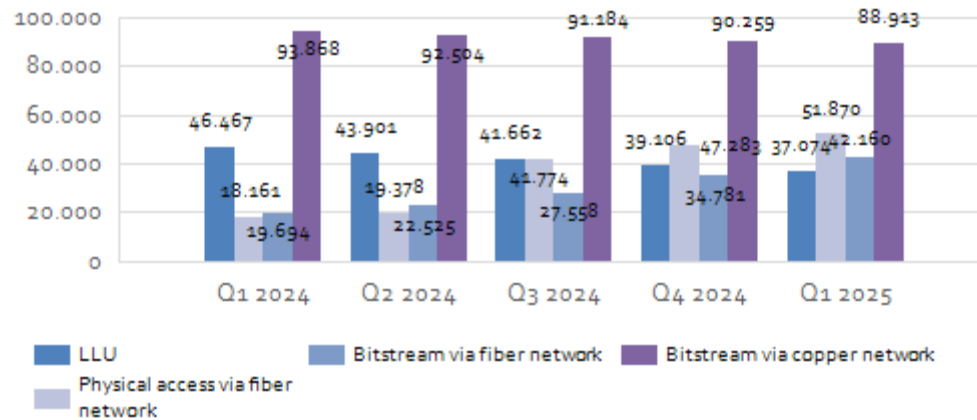


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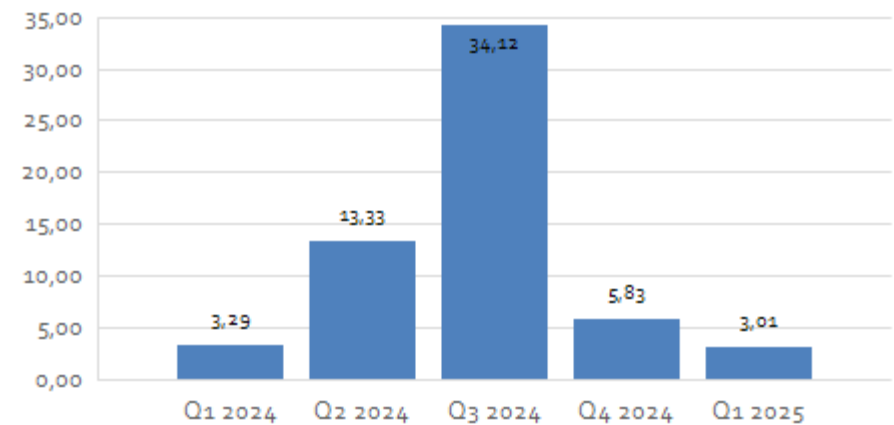
1. Quarter 2025.

Wholesale broadband access	Q1 2025	% Change Q1 2025 - Q4 2024	% Change Q1 2025 - Q1 2024
Wholesale broadband access services via copper network revenues	3.098.383,97€	-2,57%	-4,76 %
Wholesale broadband access services via fiber network revenues	2.877.301,93€	16,12 %	164,48 %
Data roaming revenues	3.011.220,00€	-48,37 %	-8,53 %
Physical wholesale access via copper network (LLU)-number of lines	37.074	-5,20 %	-20,21 %
Bitstream wholesale access via copper network-number of lines	88.913	-1,49 %	-5,28 %
Physical wholesale access via fiber network (unbundled fiber at distribution node) - number of lines	51.870	9,70 %	185,61 %
Bitstream wholesale access via fiber networks - number of lines	42.160	21,22 %	114,08 %

Wholesale broadband access by type of service



Data roaming revenues (millions EUR)



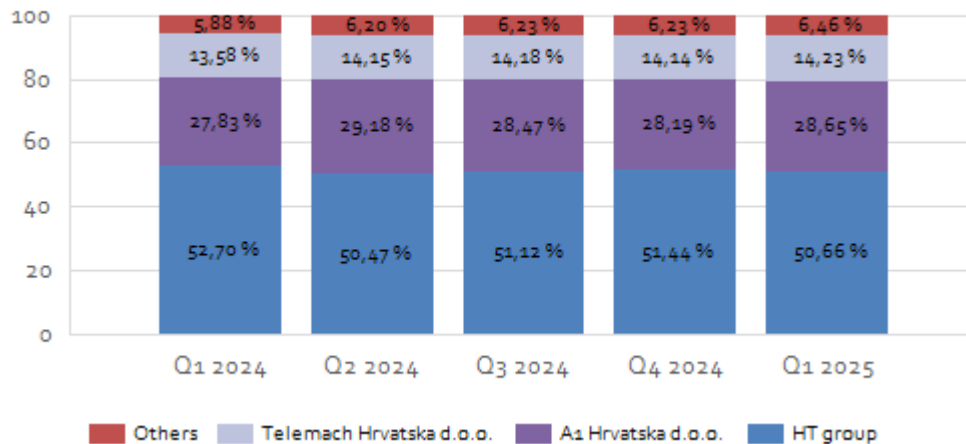


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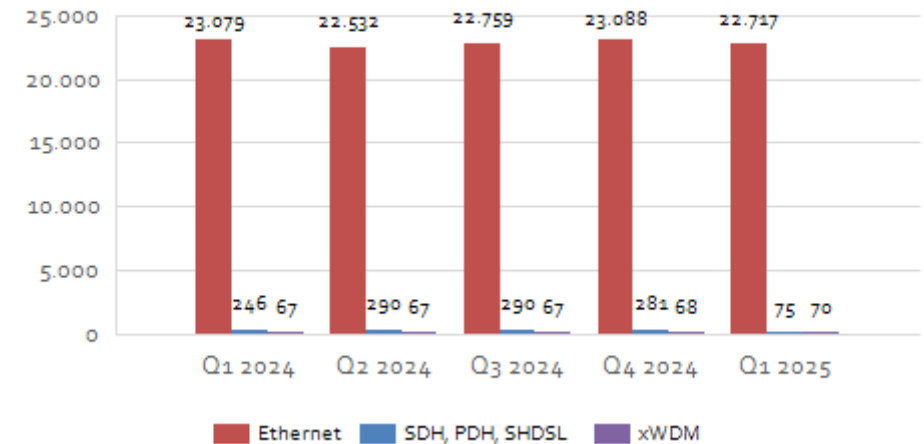
1. Quarter 2025.

Dedicated capacity services (high-quality access) - retail level*	Q1 2025	% Change Q1 2025 - Q4 2024	% Change Q1 2025 - Q1 2024
Traditional digital lines (SDH, PDH, (S)HDSL revenue	98.516,86€	-63,99 %	-64,61 %
Ethernet technology services revenue	7.773.753,33€	3,38 %	23,77 %
xWDM technology services revenue	389.882,25€	11,02 %	-12,46 %
"Dark fiber" services revenue	457.580,29€	14,24 %	10,50 %
Total number of connection points of traditional digital lines (SDH, PDH, (S)HDSL)	75	-73,31 %	-69,51 %
Total number of Ethernet technology connection points	22.717	-1,61 %	-1,57 %
Total number of xWDM technology connection points	70	2,94 %	4,48 %
Total length of fiber as a part of "dark fiber" service (km)	5.011	-0,46 %	1,79 %

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



Dedicated capacity market connection points by technologies*

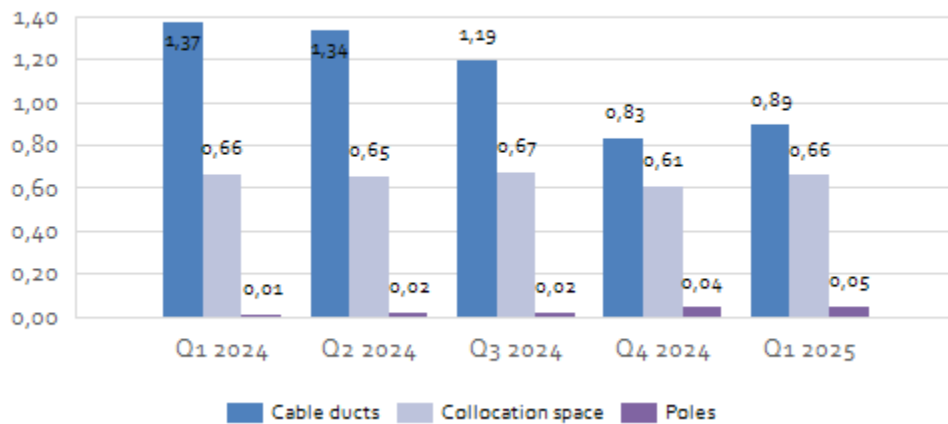


*From Q3 2024, the report no longer includes data from the operator HEP Telekomunikacije d.o.o., which provides services exclusively to companies within the HEP Group.



Shared use of electronic communications infrastructure	Q1 2025	% Change Q1 2025 - Q4 2024	% Change Q1 2025 - Q1 2024
Cable duct system shared use revenue	889.542,69€	7,23 %	-35,15 %
Poles for installation of aerial network cables rental revenue	49.265,10€	17,07 %	298,91 %
Colocation spaces rental revenue	656.970,03€	8,58 %	-0,40 %
Total length of shared use cable duct systems (km)	24.792	5,64 %	29,55 %
<i>Pipes length, 63-110 mm diameter (km)</i>	5.902	NA	NA
<i>Pipes length, 50 mm diameter (km)</i>	692	42,39 %	NA
<i>Pipes length, 20-40 mm diameter (km)</i>	6.650	1,34 %	7,59 %
<i>Pipes length, 3-16 mm diameter (km)</i>	11.548	-0,35 %	-10,87 %
Total number of rented poles for the installation of aerial network cables	5.427	9,81 %	47,83 %

Shared use of electronic communications infrastructure revenues (millions EUR)



Total length of shared cable ducts (km)

