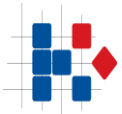




Croatian quarterly electronic communications market data for 3.quarter 2025.

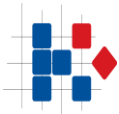
Published: 10.12.2025

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 Q3 2025

- In the first three quarters 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 over EUR 90 million invested in them in the observed period of 2025.
- In the first three quarters of 2025, total revenues from services in the electronic communications market amounted to EUR 1,392 million, an increase of 4,60 percent compared to the same period last year. Revenues from mobile networks services are 4.20 percent higher, and revenues from fixed networks are 5.45 percent higher.
- By the end of the third quarter of 2025, the migration of subscribers to fiber networks continued, resulting in an increase of 115.958 fiber broadband lines compared to the previous year, while the copper broadband lines decreased by 76.282. The total number of fiber broadband lines reached 439.935.
- The number of VHCN broadband lines reached 592.173, representing 50.22 percent of the total 1.179.126 fixed broadband lines. Moreover, the share of broadband lines with speeds above 100 Mbit/s, regardless of the technology, amounted to 52.86 percent, while the share of connections with speeds above 300 Mbit/s is 39.21 percent.
- The trend of declining usage in the landline telephone service continues, with outgoing traffic and revenues down by approximately 16 percent compared to the same period last year. The number of users decreased by less than 1.3 percent, and the number of connections by a negligible 0.1 percent, confirming the ongoing trend of gradual abandonment of this service. In the mobile telephone service, revenues increased slightly by 2 percent, alongside a 6,1 percent growth in the number of users, while outgoing traffic continues to decline, as does the sending of SMS and MMS messages. This trend is particularly evident despite the quarter covering the peak of the tourist season (July - September), due to the continued shift of users to OTT services.
- The total number of pay-TV connections shows a slight increase, although connections across all technologies except the own OTT service declined by around 5 to 12 percent, depending on the technology. As in previous periods, the own OTT service recorded the highest growth, with connections up by 66,6 percent and revenues increasing by 94,8 percent. Total revenues from pay-TV services in the third quarter amounted to 38,6 million euros, with a total of 937.862 connections.

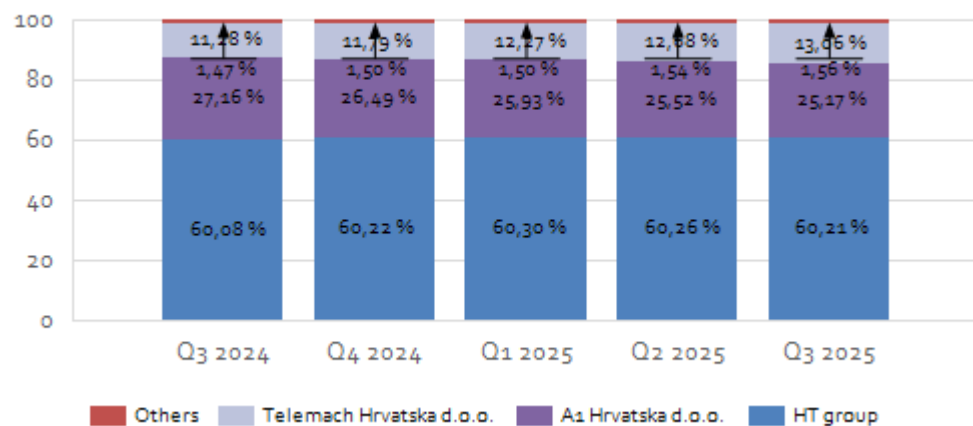


CROATIAN QUARTERLY ELECTRONIC COMMUNICATIONS MARKET DATA

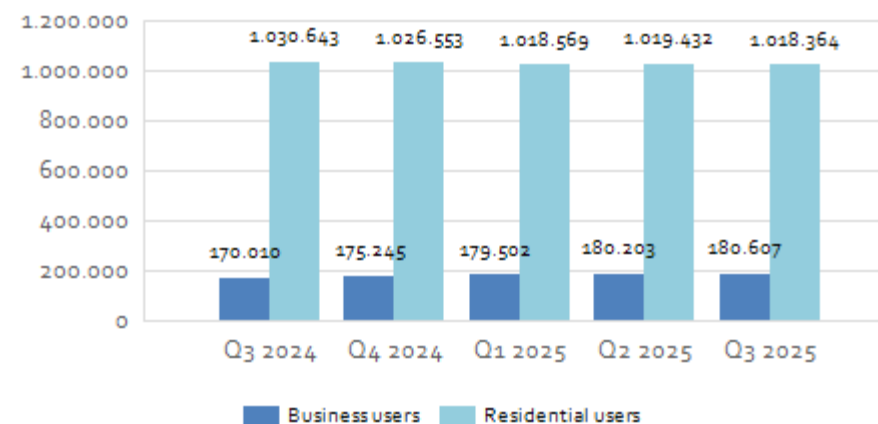
3. Quarter 2025.

Fixed telephony services	Q3 2025	% Change Q3 2025 - Q2 2025	% Change Q3 2025 - Q3 2024
Total fixed telephony services revenue	26.483.418,75€	-0,82 %	-15,80 %
Retail revenue	24.818.505,35€	-0,68 %	-13,44 %
Wholesale revenue	1.664.913,40€	-2,83 %	-40,09 %
Total number of fixed lines*	1.198.971	-0,06 %	-0,14 %
Number of subscribers	1.091.710	-0,27 %	-1,28 %
Fixed originating voice minutes (min)**	181.024.026	-6,59 %	-15,88 %

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

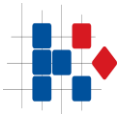


Fixed telephony lines



*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)

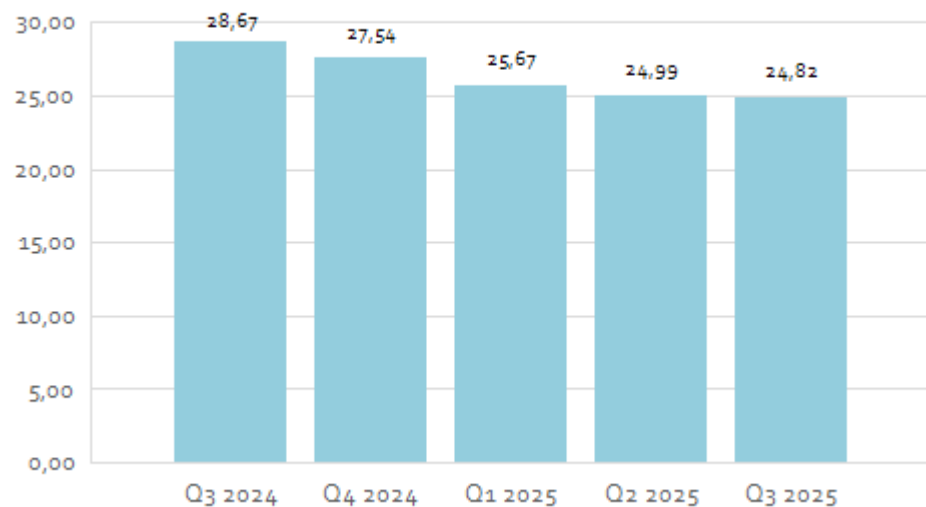


CROATIAN QUARTERLY ELECTRONIC COMMUNICATIONS MARKET DATA

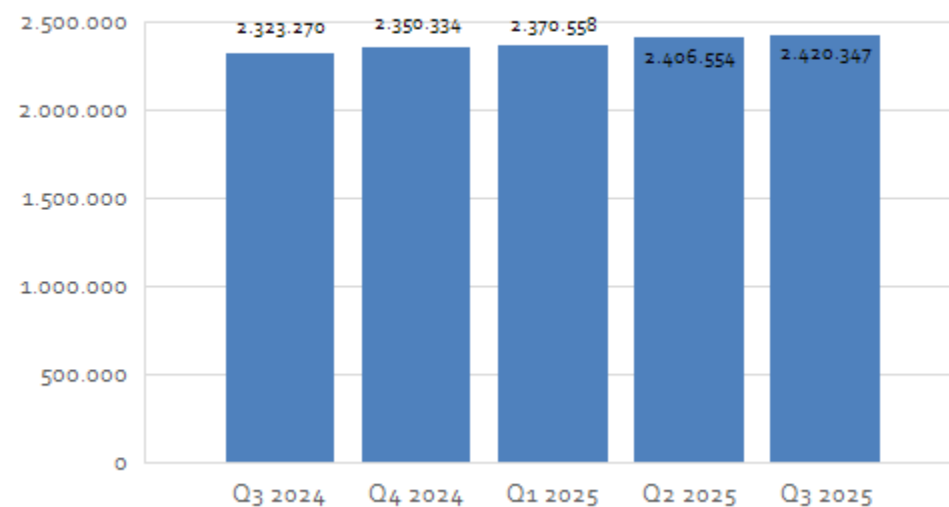
3. Quarter 2025.

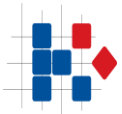
Fixed telephony services - bundles	Q3 2025	% Change Q3 2025 - Q2 2025	% Change Q3 2025 - Q3 2024
Stand-alone – fixed voice telephony subscribers	162.759	-2,75 %	-9,12 %
Number of bundled services subscribers – 2D	244.777	-3,27 %	-3,47 %
Number of bundled services subscribers – 3D	376.395	0,44 %	2,24 %
Number of bundled services subscribers – 4D	269.240	0,96 %	5,39 %

Fixed telephony service retail revenue (millions EUR)



Fixed telephony ported numbers





CROATIAN QUARTERLY ELECTRONIC COMMUNICATIONS MARKET DATA

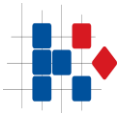
3. Quarter 2025.

Mobile telephony services	Q3 2025	% Change Q3 2025 - Q2 2025	% Change Q3 2025 - Q3 2024
Total mobile telephony services revenues	146.680.406,12€	3,92 %	2,03 %
Retail revenue	131.534.265,95€	2,86 %	3,32 %
<u>Retail revenue - Residential</u>	98.943.902,03€	5,84 %	2,99 %
<i>Prepaid subscribers</i>	22.094.018,30€	9,32 %	-1,65 %
<i>Postpaid subscribers</i>	76.849.883,73€	4,88 %	4,40 %
<u>Retail revenue - Business</u>	32.590.363,50€	-5,23 %	4,33 %
Wholesale revenue	15.146.140,17€	14,06 %	-7,94 %
Total number of active subscribers (3G, 4G, 5G)*	5.251.602	6,00 %	6,09 %
Residential	4.351.523	7,06 %	6,46 %
<i>Prepaid subscribers</i>	1.907.614	15,89 %	7,72 %
<i>Postpaid subscribers</i>	2.443.909	1,05 %	5,49 %
Business	900.079	1,16 %	4,33 %
Mobile penetration**	135,64 %	6,00 %	6,09 %
Mobile originating voice minutes (min)***	2.655.745.259	-0,80 %	-3,08 %
International roaming traffic - own subscribers (min)	88.235.844	-11,04 %	-19,00 %
International roaming traffic - foreign subscribers (min)	438.323.630	108,11 %	-15,56 %
Total SMS sent	161.661.383	-1,65 %	-19,91 %
Total MMS sent	1.171.246	-2,85 %	-20,52 %

*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

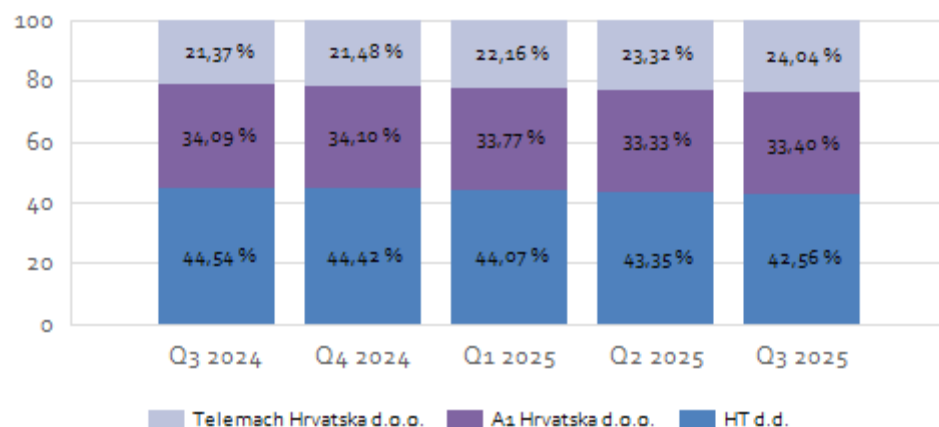
***Includes all types of calls (local, national, international calls, calls to mobile networks and calls to VAS numbers)



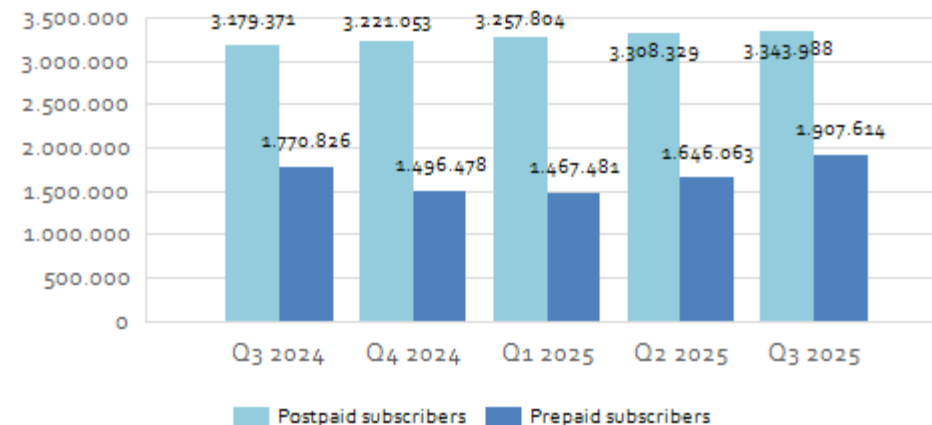
CROATIAN QUARTERLY ELECTRONIC COMMUNICATIONS MARKET DATA

3. Quarter 2025.

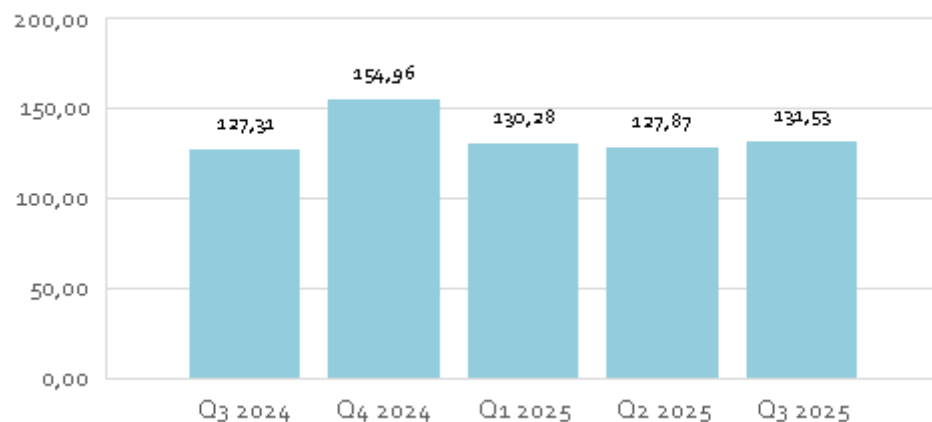
Mobile telephony operator's market shares by number of subscribers



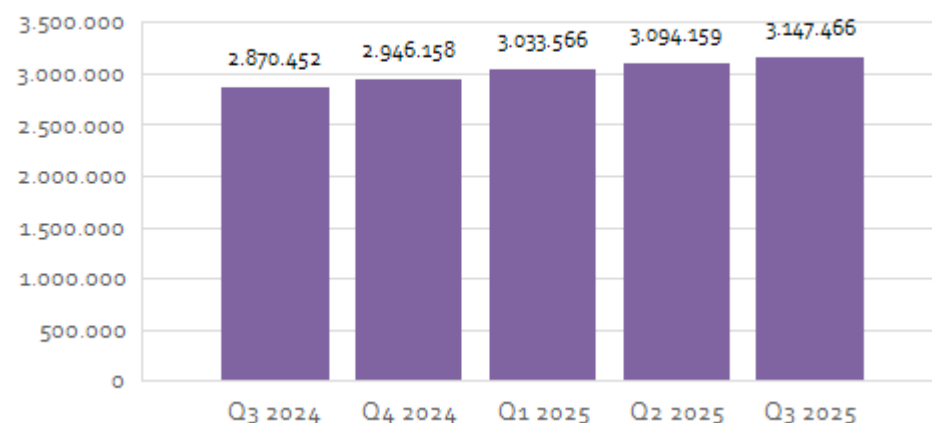
Mobile telephony service number of subscribers by quarter

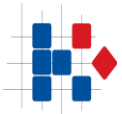


Mobile telephony service retail revenue (millions EUR)



Mobile telephony ported numbers



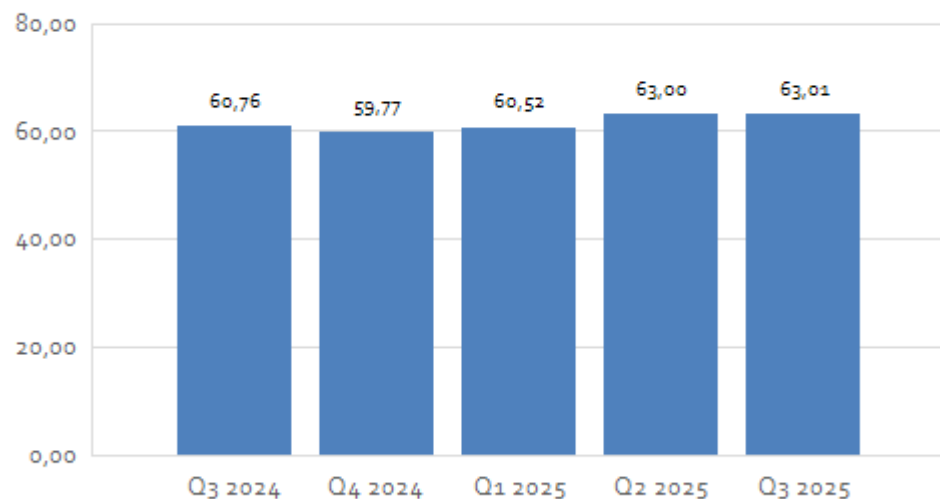


CROATIAN QUARTERLY ELECTRONIC COMMUNICATIONS MARKET DATA

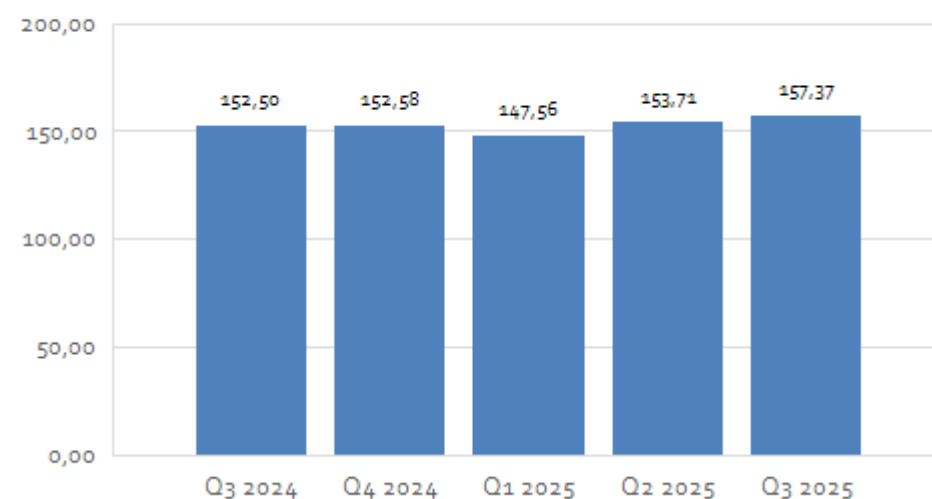
3. Quarter 2025.

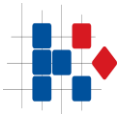
Internet access service (retail level) - revenues and total subscriptions	Q3 2025	% Change Q3 2025 - Q2 2025	% Change Q3 2025 - Q3 2024
Total broadband Internet access services revenues	222.120.006,71€	1,97 %	3,92 %
Fixed broadband Internet access service revenue	63.009.154,09€	0,02 %	3,70 %
Mobile broadband Internet access service revenue	157.371.686,14€	2,38 %	3,20 %
Satellite access revenue	1.739.166,48€	56,93 %	262,48 %
Total number of broadband subscriptions (lines)	7.498.034	4,69 %	4,99 %

Fixed broadband Internet access service retail revenues (millions EUR)



Mobile broadband Internet access service retail revenues (millions EUR)





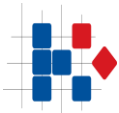
CROATIAN QUARTERLY ELECTRONIC COMMUNICATIONS MARKET DATA

3. Quarter 2025.

Internet access services (retail level) - fixed broadband network	Q3 2025	% Change Q3 2025 - Q2 2025	% Change Q3 2025 - Q3 2024
Fixed broadband Internet access service subscriptions (lines)*	1.179.126	1,14 %	3,31 %
<u>Copper access network</u>	510.159	-3,58 %	-13,01 %
Access over own copper access network	404.519	-3,54 %	-13,17 %
xDSL based broadband using full local-loop unbundling	26.950	-5,90 %	-22,07 %
xDSL based broadband using shared access	2	0,00 %	0,00 %
Bitstream access over copper access network (xDSL)	78.688	-2,99 %	-8,50 %
<u>Fiber optic access network</u>	439.935	7,26 %	35,50 %
Access over own fiber access network	322.880	5,39 %	25,49 %
Fiber unbundling access	59.406	7,81 %	44,63 %
Bitstream access over fiber optic access network	57.649	18,34 %	119,18 %
<u>Cable access network</u>	152.238	-2,54 %	-9,22 %
<u>Fixed wireless access (FWA)</u>	56.004	3,53 %	10,52 %
<u>Satellite access</u>	11.659	60,28 %	232,54 %
<u>High Quality Access</u>	9.131	1,81 %	9,80 %
<u>Fixed broadband traffic (TB)</u>	1.093.442	7,70 %	21,12 %

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

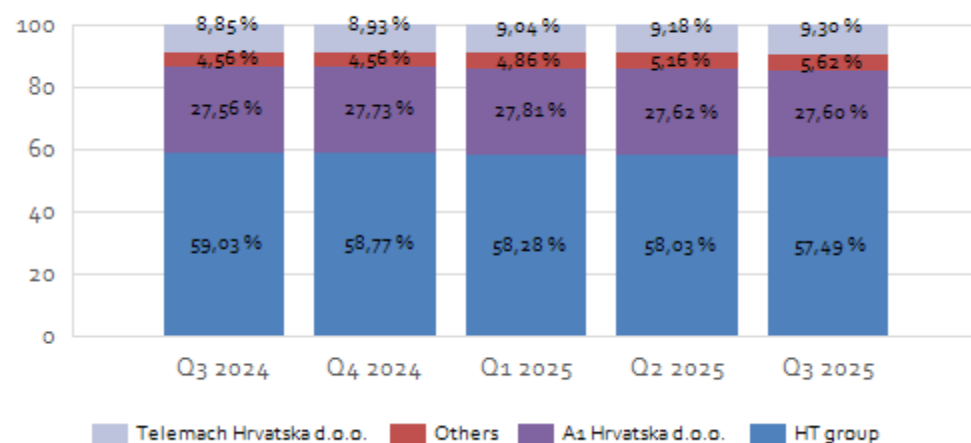
Internet access services (retail level) - bundles	Q3 2025	% Change Q3 2025 - Q2 2025	% Change Q3 2025 - Q3 2024
Number of standalone internet access service subscribers	5.295.925	5,80 %	4,53 %
Number of bundled services subscribers – 2D	437.507	-2,08 %	-1,14 %
Number of bundled services subscribers – 3D	436.460	0,34 %	2,31 %
Number of bundled services subscribers – 4D	269.240	0,96 %	5,39 %



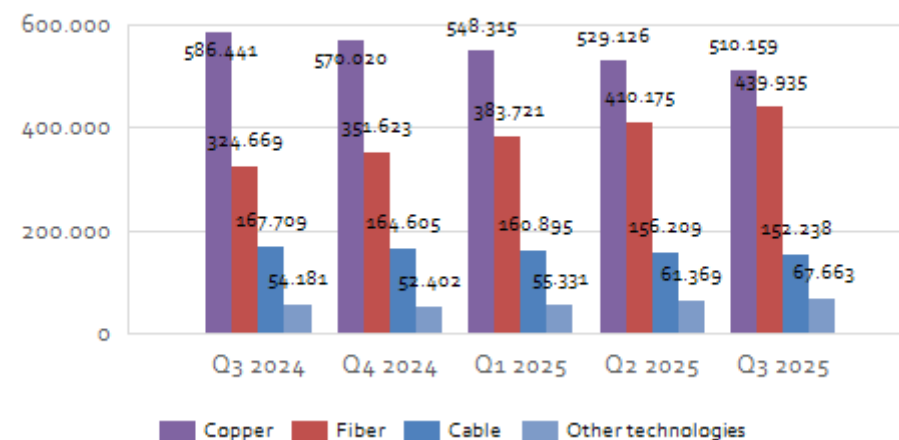
CROATIAN QUARTERLY ELECTRONIC COMMUNICATIONS MARKET DATA

3. Quarter 2025.

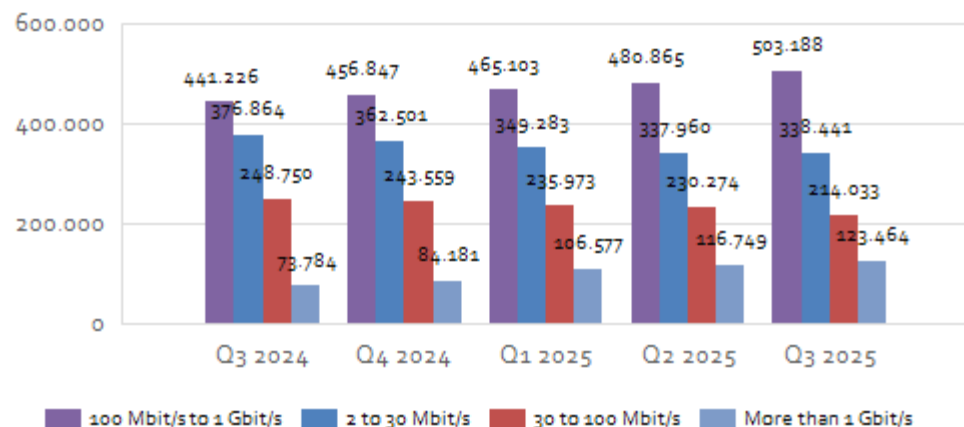
Fixed broadband Internet access service operator's market shares by number of lines



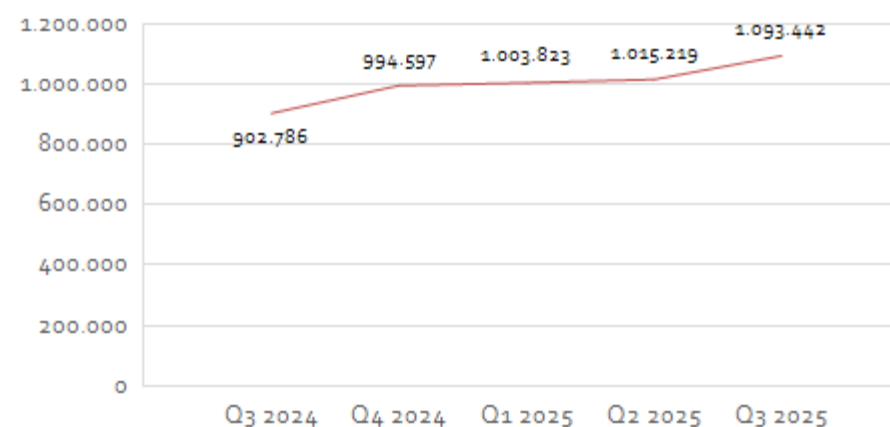
Fixed broadband Internet access service by technologies



Fixed broadband Internet access service by download speeds



Total fixed broadband data traffic (TB)



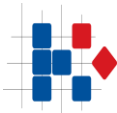


CROATIAN QUARTERLY ELECTRONIC COMMUNICATIONS MARKET DATA

3. Quarter 2025.

Internet access services (retail level) - mobile broadband network	Q3 2025	% Change Q3 2025 - Q2 2025	% Change Q3 2025 - Q3 2024
Mobile broadband Internet access service subscriptions (3G, 4G, 5G etc)*	6.318.908	5,38 %	5,31 %
<u>Residential (3G and 4G)</u>	3.374.071	7,76 %	-2,35 %
<i>Dedicated data subscriptions (cards/modems/keys etc.)</i>	141.400	-1,48 %	-29,29 %
<i>Mobile phones*</i>	3.084.123	8,97 %	0,30 %
<i>M2M</i>	5	0,00 %	150,00 %
<i>Broadband access at fixed location via mobile network</i>	148.543	-5,56 %	-17,78 %
<u>Residential (5G)</u>	1.393.752	3,59 %	27,77 %
<i>Dedicated data subscriptions (cards/modems/keys etc.)</i>	70.973	13,44 %	47,16 %
<i>Mobile phones</i>	1.268.232	2,67 %	25,13 %
<i>M2M</i>	0	NA	NA
<i>Broadband access at fixed location via mobile network</i>	54.547	14,38 %	87,41 %
<u>Business (3G and 4G)</u>	1.150.624	3,91 %	1,31 %
<i>Dedicated data subscriptions (cards/modems/keys etc.)</i>	130.417	0,48 %	-1,13 %
<i>Mobile phones</i>	595.706	4,13 %	-3,25 %
<i>M2M</i>	381.498	5,67 %	11,86 %
<i>Broadband access at fixed location via mobile network</i>	43.003	-3,18 %	-8,62 %
<u>Business (5G)</u>	400.461	-2,84 %	25,69 %
<i>Dedicated data subscriptions (cards/modems/keys etc.)</i>	30.366	3,55 %	34,37 %
<i>Mobile phones</i>	304.359	-4,17 %	23,24 %
<i>M2M</i>	61.495	0,26 %	32,15 %
<i>Broadband access at fixed location via mobile network</i>	4.241	9,59 %	69,64 %
<u>Mobile broadband traffic (TB)</u>	434.911	16,08 %	12,23 %

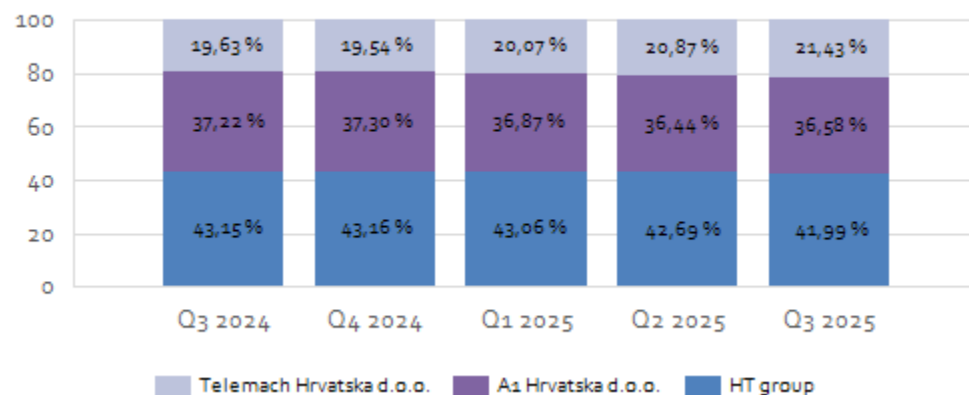
*Number of subscribers which have made an internet mobile connection in the last 90 days through mobile phones



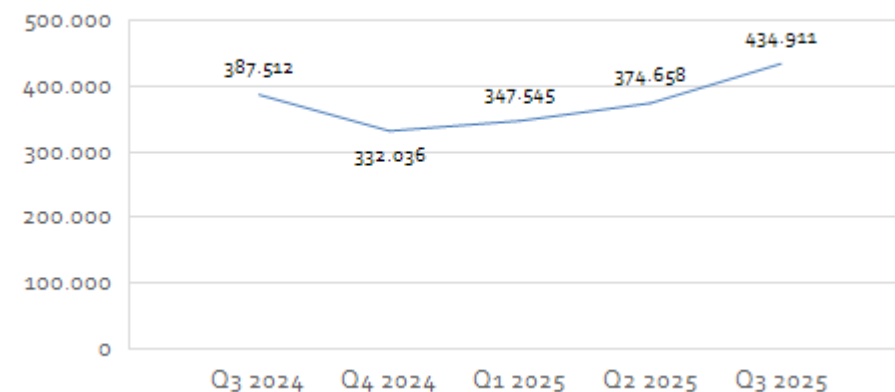
CROATIAN QUARTERLY ELECTRONIC COMMUNICATIONS MARKET DATA

3. Quarter 2025.

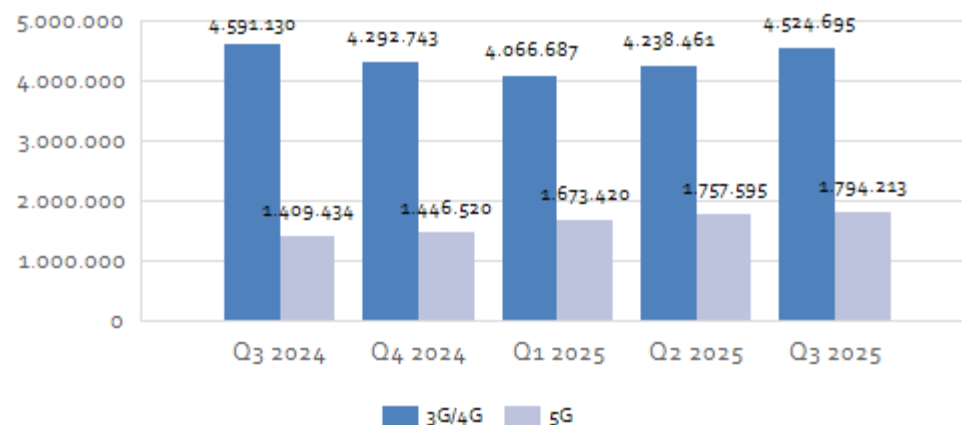
Mobile broadband Internet access service operator's market shares by number of subscriptions



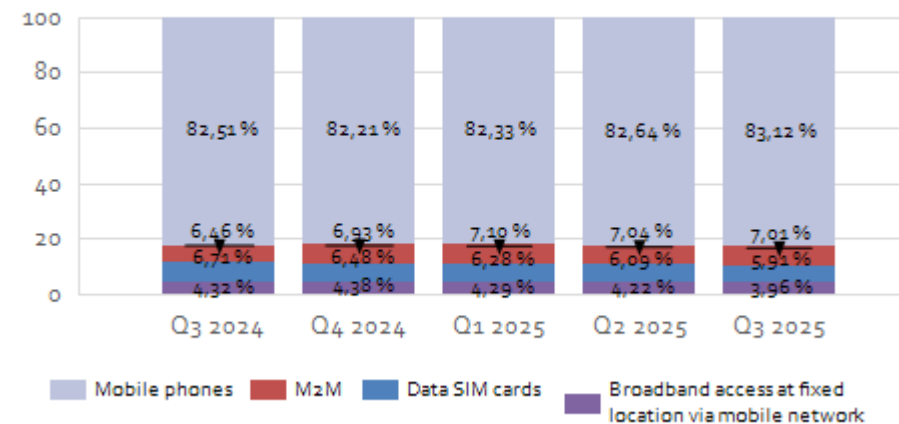
Total mobile broadband data traffic (TB)

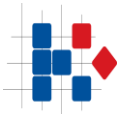


Mobile broadband Internet access service subscriptions by technologies



Mobile broadband Internet access service subscriptions by type of access





CROATIAN QUARTERLY ELECTRONIC COMMUNICATIONS MARKET DATA

3. Quarter 2025.

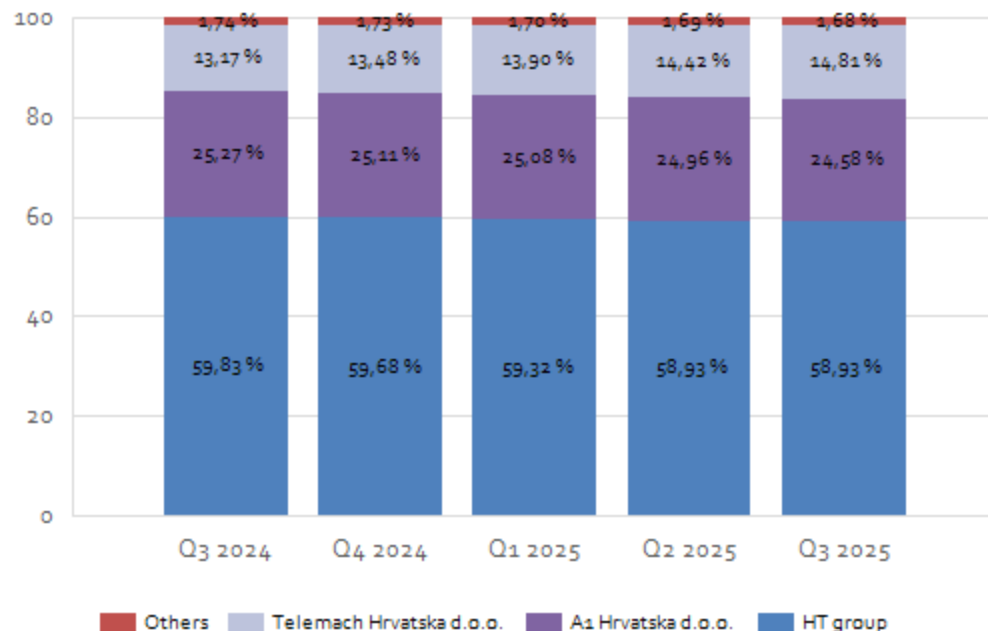
Television services	Q3 2025	% Change Q3 2025 - Q2 2025	% Change Q3 2025 - Q3 2024
Television services revenues	38.590.452,02€	-0,46 %	5,93 %
Cable TV revenue	5.446.477,21€	-10,25 %	-3,79 %
IPTV revenue	20.847.534,79€	-2,31 %	0,72 %
Satellite TV revenue	3.907.422,70€	0,00 %	-6,58 %
Digital terrestrial TV revenue	3.117.353,19€	-0,62 %	-2,06 %
Own OTT service revenue	5.271.664,13€	22,15 %	94,78 %
Total number of pay-TV subscriptions (lines)	937.862	0,32 %	1,25 %
Cable reception	114.416	-3,13 %	-12,00 %
<i>Residential</i>	111.320	-3,14 %	-12,02 %
<i>Business</i>	3.096	-2,79 %	-11,06 %
IPTV	451.916	-1,35 %	-4,70 %
<i>Residential</i>	425.098	-1,41 %	-4,97 %
<i>Business</i>	26.818	-0,51 %	-0,17 %
Satellite reception (SAT TV)	107.441	-3,56 %	-10,89 %
<i>Residential</i>	98.438	-3,68 %	-11,14 %
<i>Business</i>	9.003	-2,18 %	-8,12 %
Digital terrestrial reception – pay TV	80.705	-3,98 %	-11,75 %
<i>Residential</i>	79.784	-3,98 %	-11,79 %
<i>Business</i>	921	-3,66 %	-8,18 %
Own OTT service	183.384	12,38 %	66,63 %
<i>Residential</i>	170.859	12,33 %	69,31 %
<i>Business</i>	12.525	13,01 %	36,99 %



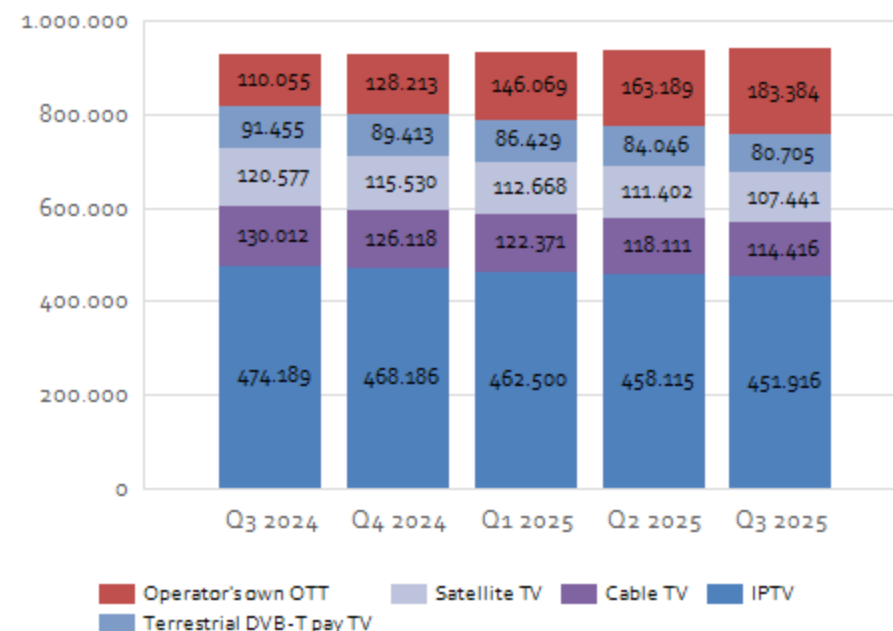
CROATIAN QUARTERLY ELECTRONIC COMMUNICATIONS MARKET DATA

3. Quarter 2025.

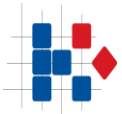
Pay TV operator's market shares by number of subscriptions



Pay TV subscriptions by technologies



Television services - bundles	Q3 2025	% Change Q3 2025 - Q2 2025	% Change Q3 2025 - Q3 2024
Stand-alone – TV subscribers	252.383	-0,08 %	-4,51 %
Number of bundled services subscribers – 2D	89.877	-4,23 %	-3,76 %
Number of bundled services subscribers – 3D	318.073	0,06 %	2,99 %
Number of bundled services subscribers – 4D	269.240	0,96 %	5,39 %

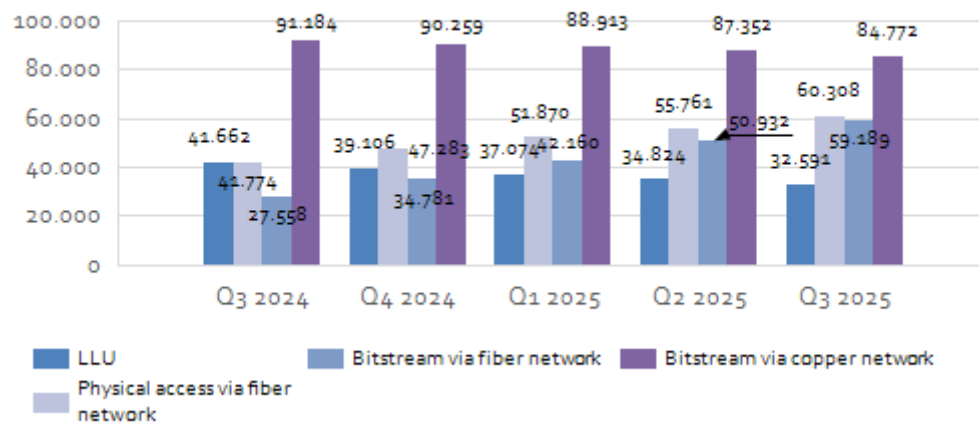


CROATIAN QUARTERLY ELECTRONIC COMMUNICATIONS MARKET DATA

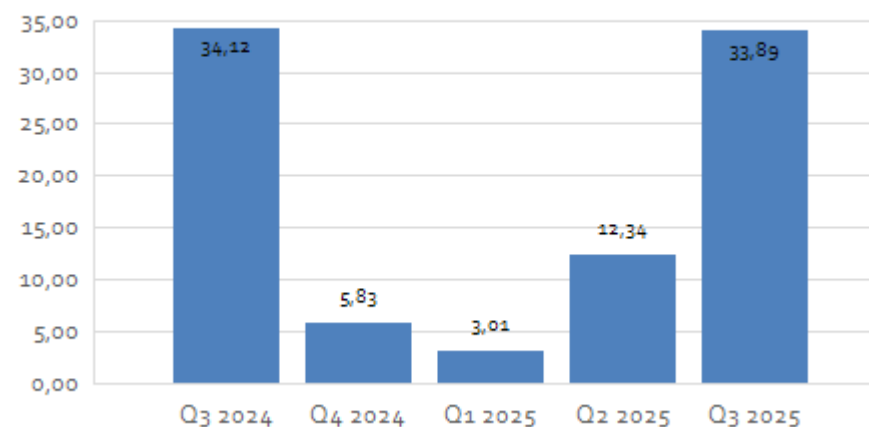
3. Quarter 2025.

Wholesale broadband access	Q3 2025	% Change Q3 2025 - Q2 2025	% Change Q3 2025 - Q3 2024
Wholesale broadband access services via copper network revenues	2.932.116,20€	-3,00%	-10,04 %
Wholesale broadband access services via fiber network revenues	3.659.397,11€	11,78 %	75,94 %
Data roaming revenues	33.894.142,98€	174,62 %	-0,67 %
Physical wholesale access via copper network (LLU)-number of lines	32.591	-6,41 %	-21,77 %
Bitstream wholesale access via copper network-number of lines	84.772	-2,95 %	-7,03 %
Physical wholesale access via fiber network (unbundled fiber at distribution node) - number of lines	60.308	8,15 %	44,37 %
Bitstream wholesale access via fiber networks - number of lines	59.189	16,21 %	114,78 %

Wholesale broadband access by type of service



Data roaming revenues (millions EUR)



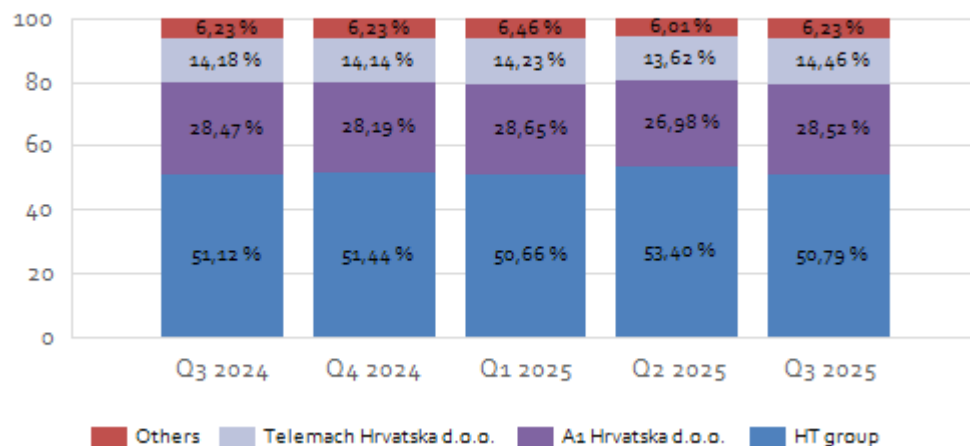


CROATIAN QUARTERLY ELECTRONIC COMMUNICATIONS MARKET DATA

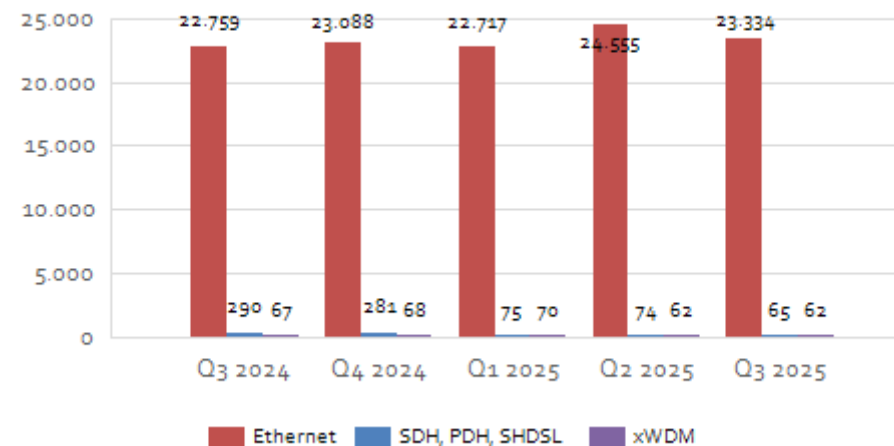
3. Quarter 2025.

Dedicated capacity services (high-quality access) - retail level*	Q3 2025	% Change Q3 2025 - Q2 2025	% Change Q3 2025 - Q3 2024
Traditional digital lines (SDH, PDH, (S)HDSL revenue	97.013,44€	-0,81 %	-64,51 %
Ethernet technology services revenue	7.931.323,98€	1,09 %	21,56 %
xWDM technology services revenue	373.119,17€	0,15 %	-3,59 %
"Dark fiber" services revenue	422.132,12€	-3,89 %	3,29 %
Total number of connection points of traditional digital lines (SDH, PDH, (S)HDSL)	65	-12,16 %	-77,59 %
Total number of Ethernet technology connection points	23.334	-4,97 %	2,53 %
Total number of xWDM technology connection points	62	0,00 %	-7,46 %
Total length of fiber as a part of "dark fiber" service (km)	4.808	0,94 %	-4,49 %

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.

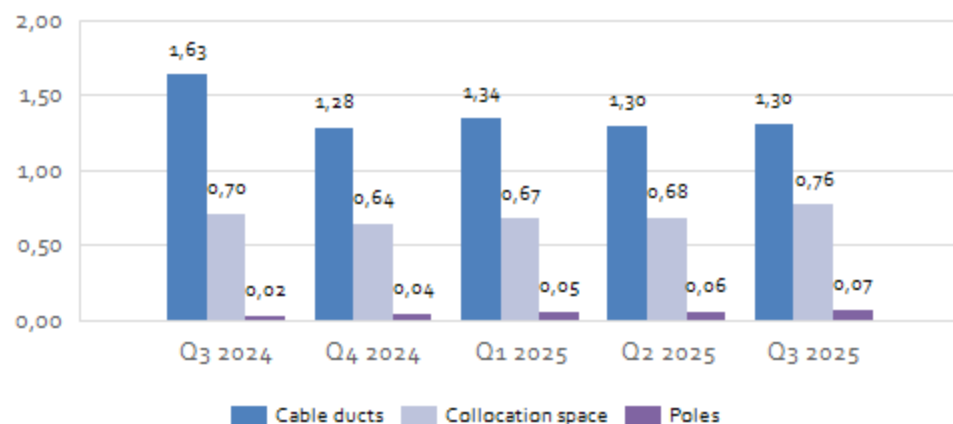


CROATIAN QUARTERLY ELECTRONIC COMMUNICATIONS MARKET DATA

3. Quarter 2025.

Shared use of electronic communications infrastructure	Q3 2025	% Change Q3 2025 - Q2 2025	% Change Q3 2025 - Q3 2024
Cable duct system shared use revenue	1.299.402,30€	0,34 %	-20,38 %
Poles for installation of aerial network cables rental revenue	69.427,10€	24,30 %	224,10 %
Colocation spaces rental revenue	763.960,40€	12,15 %	8,66 %
Total length of shared use cable duct systems (km)	28.830	10,39 %	40,72 %
<i>Pipes length, 63-110 mm diameter (km)</i>	7.310	NA	341,69 %
<i>Pipes length, 50 mm diameter (km)</i>	2.594	73,51 %	493,59 %
<i>Pipes length, 20-40 mm diameter (km)</i>	7.068	5,51 %	10,25 %
<i>Pipes length, 3-16 mm diameter (km)</i>	11.858	4,50 %	-1,06 %
Total number of rented poles for the installation of aerial network cables	6.139	7,06 %	44,75 %

Shared use of electronic communications infrastructure revenues (millions EUR)



Total length of shared cable ducts (km)

