



Quarterly data on the electronic communications market in the Republic of Croatia for 4. quarter 2025.

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This report presents the quarterly indicators of the development of the electronic communications market. The report is based on regularly collected data from all operators in the electronic communications market in the Republic of Croatia. In some cases, HAKOM cannot detect inaccuracies in the reports/data until several consecutive periods are compared. Consequently, HAKOM notes that all reports may contain minor deviations from the actual data. Furthermore, the values of individual indicators in this report may differ from previously published values due to corrections and/or subsequently submitted reports by certain operators. HAKOM does not assume responsibility for the quality of the reports containing data received from operators.



Summary overview of the market in Q4 2025

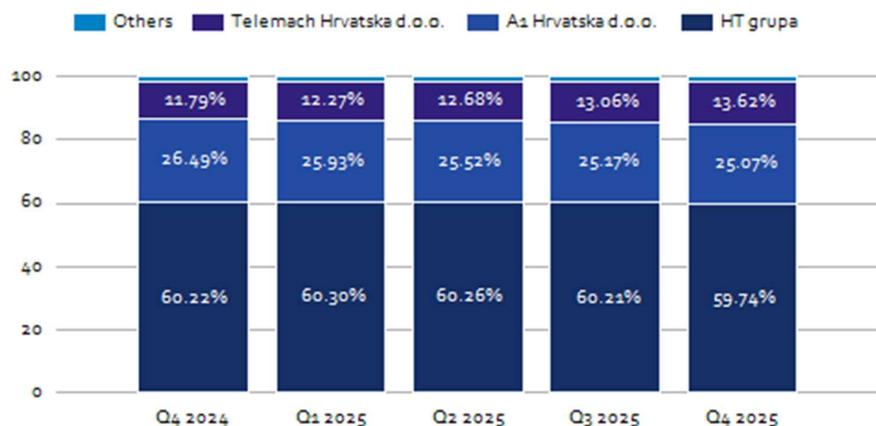
- In 2025, compared to the same period last year, there was an increase in investments in fixed assets in the fixed network, while investment in fixed assets in the mobile network showed a slight decrease. As expected, investments in VHCN networks increased the most, with over EUR 135 million invested in the observed period of 2025.
- In the first four quarters of 2025, total revenues from services in the electronic communications market amounted to EUR 1.870 million, an increase of 3,63% compared to the same period last year. Revenues from mobile networks services are 2,94 percent higher, and revenues from fixed networks are 5.08 percent higher.
- By the end of the fourth quarter of 2025, the migration of subscribers to fiber networks continued, resulting in an increase of 119.373 fiber broadband lines compared to the previous year, while the copper broadband lines decreased by 84.138. The total number of fiber broadband lines reached 470.996, accounting for 39.76 percent of the total 1.184.418 fixed broadband lines.
- The number of VHCN broadband lines reached 618.640, representing 52.33 percent of the total fixed broadband lines. Moreover, the share of broadband lines with speeds above 100 Mbit/s, regardless of the technology, amounted to 55.40 percent, while the share of connections with speeds above 300 Mbit/s is 41.72 percent.
- In publicly available fixed-line telephony services, the downward trend in usage continued, with annual revenues decreasing by 14.8 percent and total outgoing traffic declining by 12.5 percent. The number of users decreased by 1.5 percent, further confirming the ongoing reduction in demand for this service.
- In publicly available mobile telephony services, total revenue showed a slight decline of 2.1 percent, while the number of users grew by 5.2 percent. Despite the increase in users, total outgoing traffic declined by 2.9 percent, alongside a significant drop in SMS and MMS usage, which decreased by 21.4 percent and 16.8 percent respectively, indicating a continued shift of users toward OTT services.
- The total number of pay-tv subscriptions in the fourth quarter recorded a modest increase of 1.3 percent, reaching 939,653 connections. Subscriptions declined across all technologies except for the company's own OTT service, which continued to grow strongly, up 58.6 percent. Total revenues from pay-tv services amounted to €39.7 million, representing a 7.6 percent year-on-year increase, despite revenue declines across all other technologies except the company's OTT platform. Growth remained primarily driven by the OTT service, whose revenues surged by 136.2 percent, reaching nearly €8 million.



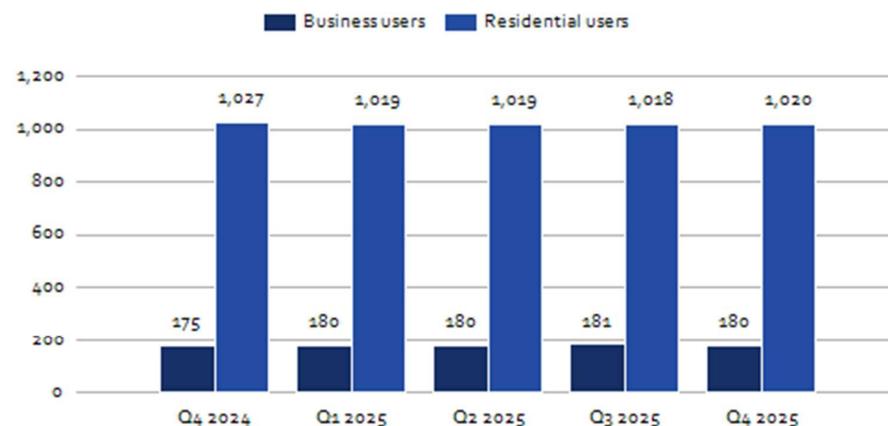
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Fixed telephony services	Q4 2025	% Change Q4 2025 - Q3 2025	% Change Q4 2025 - Q4 2024
Total fixed telephony services revenue	25,371,673.44€	-4.20 %	-14.77%
Retail revenue	23,906,925.83€	-3.67%	-13.18%
Wholesale revenue	1,464,747.61€	-12.02%	-34.40%
Total number of fixed lines*	1,199,735	0.06%	-0.17%
Number of subscribers	1,085,368	-0.58%	-1.48%
Fixed originating voice minutes (min)**	188,220,293	3.98%	-12.54%



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



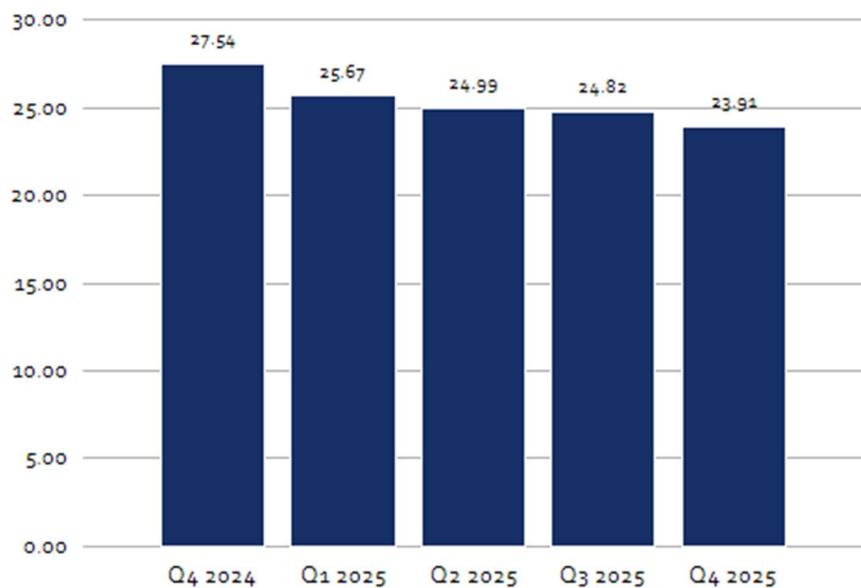
Fixed telephony lines (in thousands)

*CPS (carrier pre-selection) subscribers are included

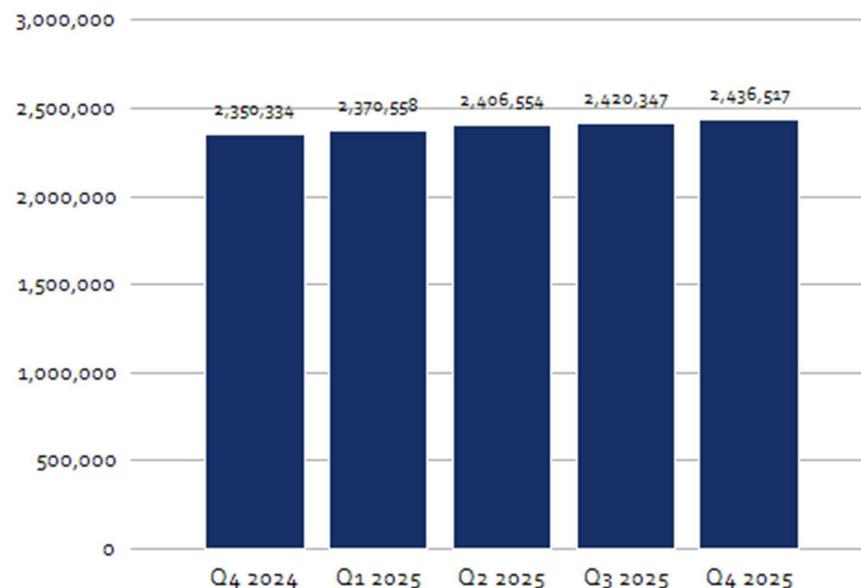
**Includes all types of calls (local, national, international calls, calls to mobile networks and calls to VAS numbers)



Fixed telephony services - bundles	Q4 2025	% Change Q4 2025 - Q3 2025	% Change Q4 2025 - Q4 2024
Stand-alone – fixed voice telephony subscribers	158,418	-2.99%	-9.68%
Number of bundled services subscribers – 2D	249,328	0.32%	-1.93%
Number of bundled services subscribers – 3D	383,023	1.23%	3.40%
Number of bundled services subscribers – 4D	274,760	2.05%	6.13%



Fixed telephony service retail revenue (millions EUR)



Fixed telephony ported numbers



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Mobile telephony services	Q4 2025	% Change Q4 2025 - Q3 2025	% Change Q4 2025 - Q4 2024
Total mobile telephony services revenues	164,447,259.73€	12.11%	-2.06%
Retail revenue	152,407,220.90€	15.87%	-1.65%
Retail revenue - Residential	113,754,405.41€	14.97%	-0.87%
Prepaid subscribers	22,991,094.53€	4.06%	-6.98%
Postpaid subscribers	90,763,310.88€	18.10%	0.81%
Retail revenue - Business	38,652,815.50€	18.60%	-3.85%
Wholesale revenue	12,040,038.83€	-20.51%	-6.97%
Total number of active subscribers (3G, 4G, 5G)*	4,960,809	-5.54%	5.16%
Residential	4,049,279	-6.95%	5.31%
Prepaid subscribers	1,584,017	-16.96%	5.85%
Postpaid subscribers	2,465,262	0.87%	4.97%
Business	911,530	1.27%	4.48%
Mobile penetration**	128.13%	-5.54%	5.16%
Mobile originating voice minutes (min)***	2,660,205,466	0.17%	-2.85%
International roaming traffic - own subscribers (min)	86,843,681	-1.58%	-21.74%
International roaming traffic - foreign subscribers (min)	84,045,356	-80.83%	-23.20%
Total SMS sent	150,728,579	-6.76%	-21.44%
Total MMS sent	1,175,878	0.40%	-16.76%

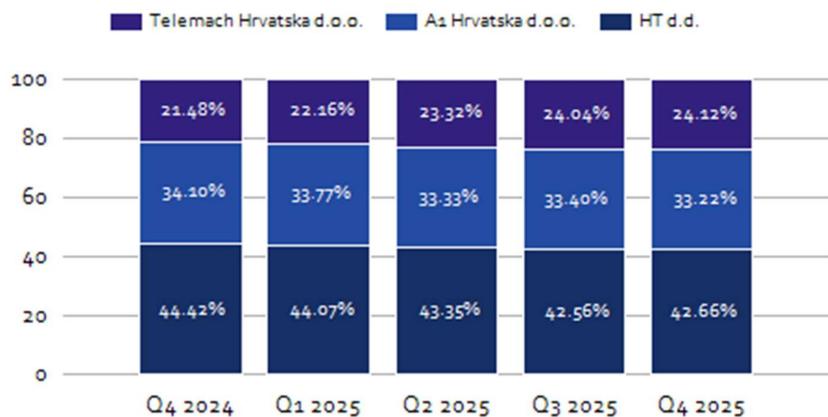
*Definition of active pre-paid subscriber: Subscriber who has used a mobile service or refilled the account in the last go days

**Mobile penetration has been calculated according to the last census of population from 2021

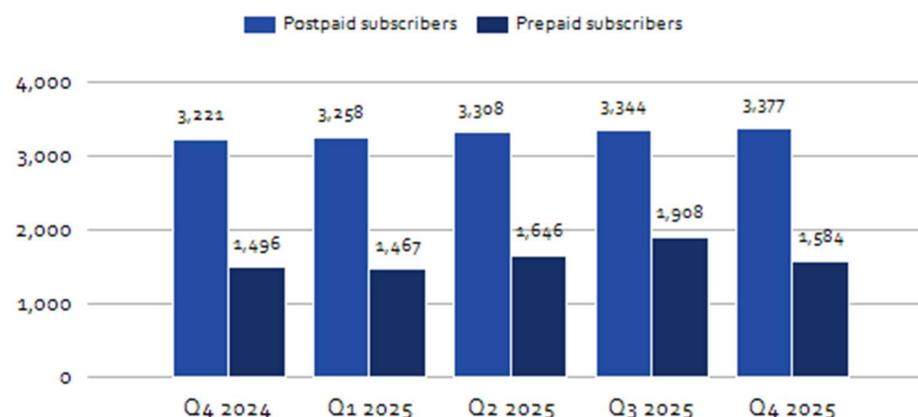
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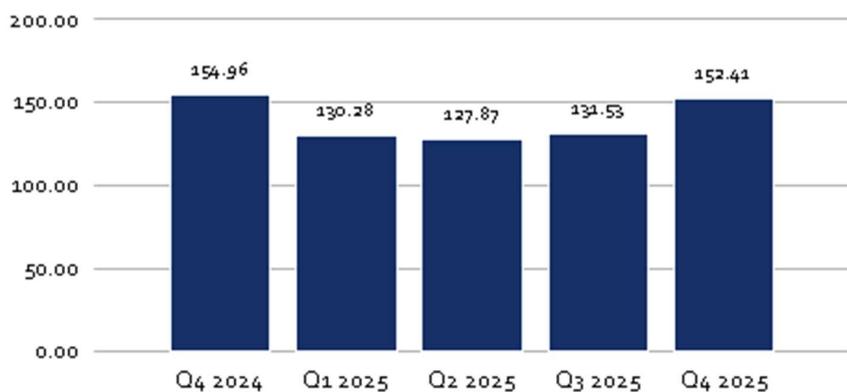
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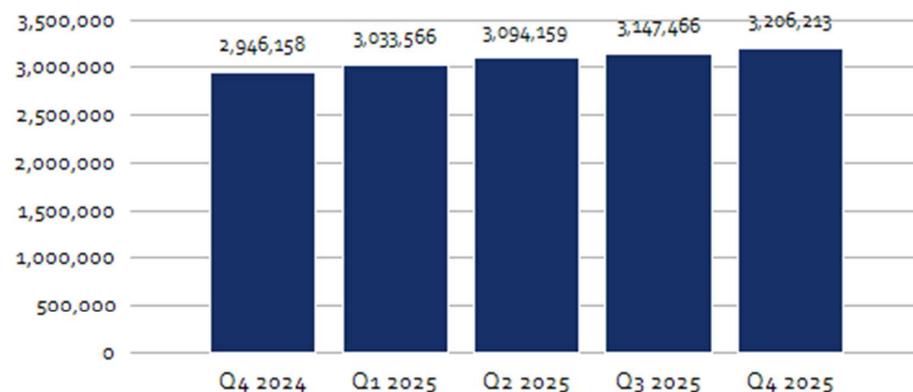
Mobile telephony operator's market shares by number of subscribers



Mobile telephony service number of subscribers by quarter (in thousands)



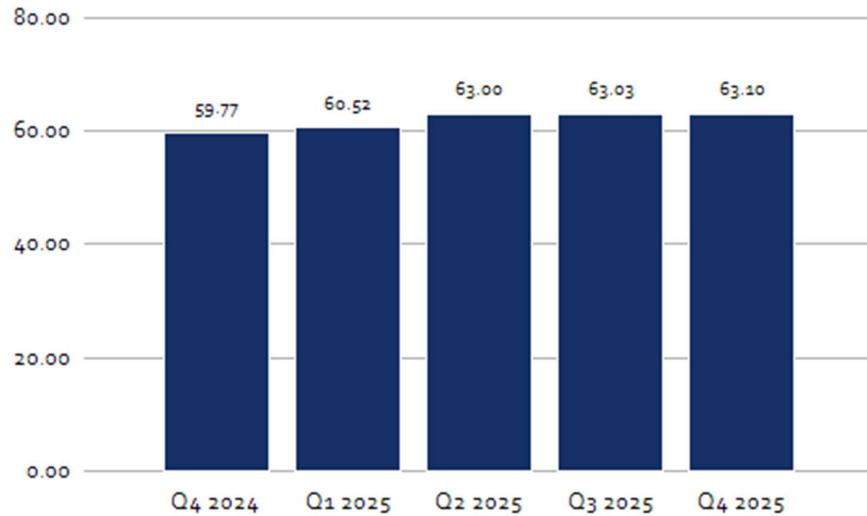
Mobile telephony service retail revenue (millions EUR)



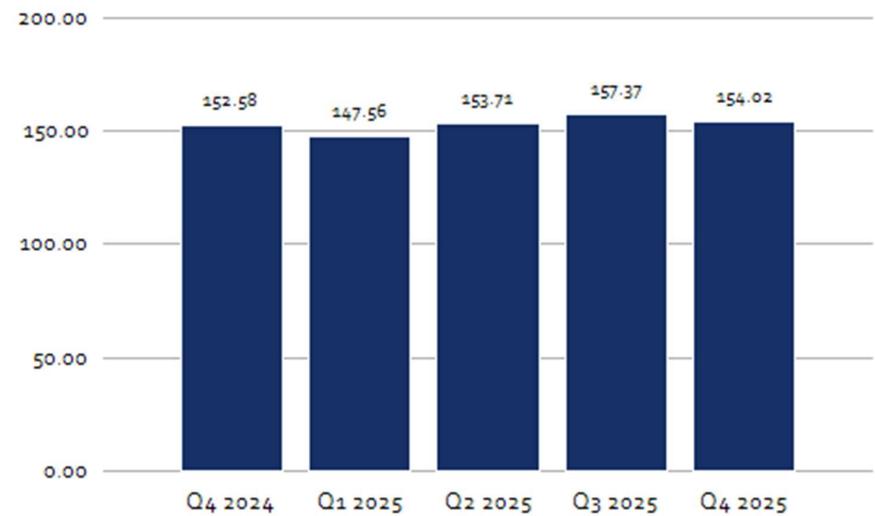
Mobile telephony ported numbers



Internet access service (retail level) - revenues and total subscriptions	Q4 2025	% Change Q4 2025 - Q3 2025	% Change Q4 2025 - Q4 2024
Total broadband Internet access services revenues	218,746,186.38€	-1.53%	2.69%
Fixed broadband Internet access service revenue	63,102,721.43€	0.12%	5.57%
Mobile broadband Internet access service revenue	154,020,866.91€	-2.13%	0.94%
Satellite access revenue	1,622,598.04€	-6.70%	147.33%
Total number of broadband subscriptions (lines)	7,202,581	-3.95%	4.59%



Fixed broadband Internet access service retail revenues (millions EUR)



Mobile broadband Internet access service retail revenues (millions EUR)



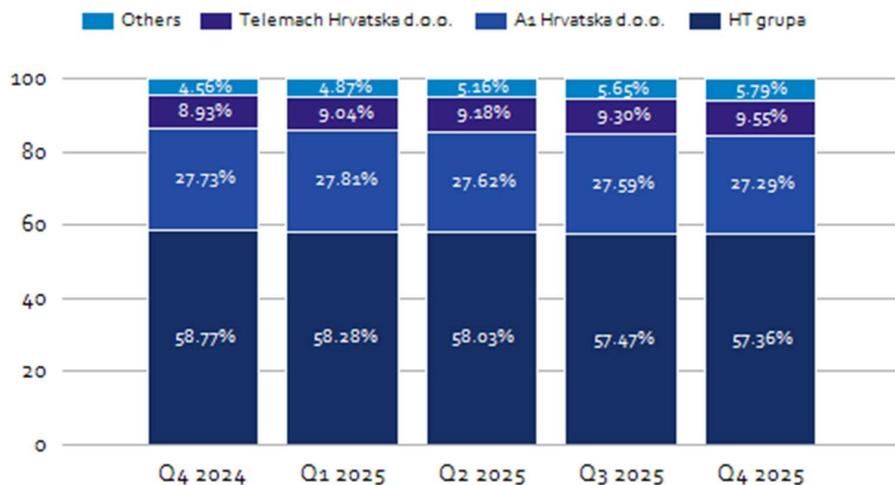
Internet access services (retail level) - fixed broadband network	Q4 2025	% Change Q4 2025 - Q3 2025	% Change Q4 2025 - Q4 2024
Fixed broadband Internet access service subscriptions (lines)*	1,184,418	0.42%	3.25%
<u>Copper access network</u>	485,882	-4.76%	-14.76%
<i>Access over own copper access network</i>	385,551	-4.69%	-14.95%
<i>xDSL based broadband using full local-loop unbundling</i>	24,985	-7.29%	-23.46%
<i>xDSL based broadband using shared access</i>	2	0.00%	0.00%
<i>Bitstream access over copper access network (xDSL)</i>	75,344	-4.25%	-10.39%
<u>Fiber optic access network</u>	470,996	7.06%	33.95%
<i>Access over own fiber access network</i>	341,124	5.65%	24.39%
<i>Fiber unbundling access</i>	64,471	8.52%	45.75%
<i>Bitstream access over fiber optic access network</i>	65,401	13.45%	97.26%
<u>Cable access network</u>	148,253	-2.62%	-9.93%
<u>Fixed wireless access (FWA)</u>	57,243	1.50%	17.79%
<u>Satellite access</u>	12,839	10.12%	237.42%
<u>High Quality Access</u>	9,205	0.81%	9.09%
<u>Fixed broadband traffic (TB)</u>	1,219,975	11.08%	22.66%

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

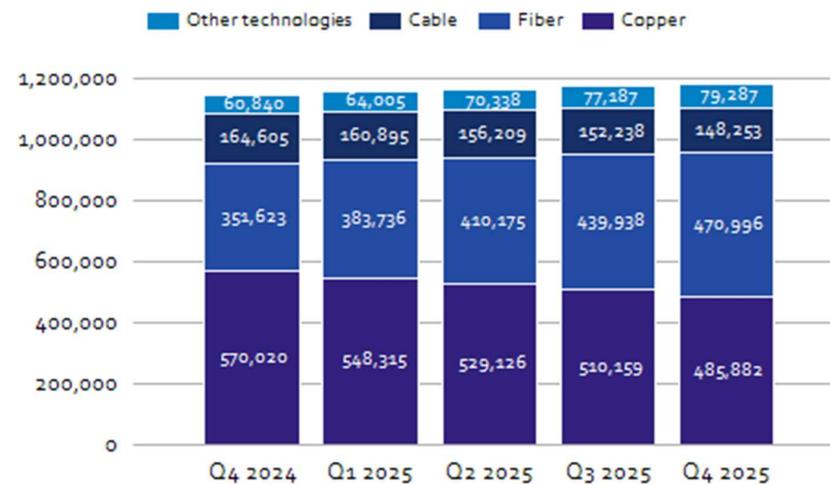
Internet access services (retail level) - bundles	Q4 2025	% Change Q4 2025 - Q3 2025	% Change Q4 2025 - Q4 2024
Number of standalone internet access service subscribers	5,051,989	-4.72%	5.43%
Number of bundled services subscribers – 2D	441,585	-0.28%	-0.61%
Number of bundled services subscribers – 3D	444,053	1.28%	3.25%
Number of bundled services subscribers – 4D	274,760	2.05%	6.13%



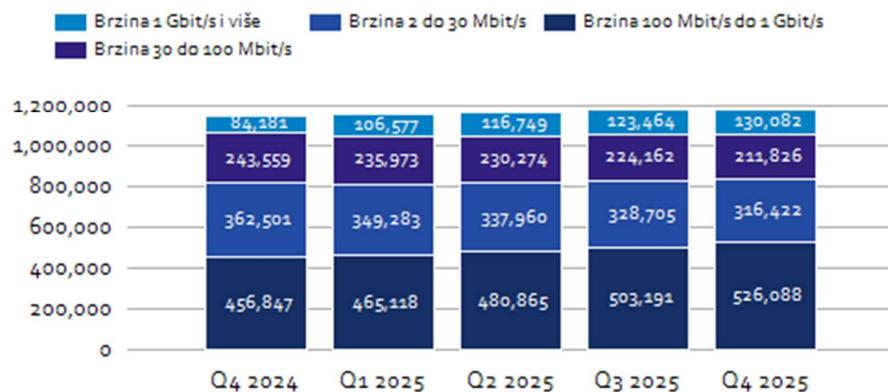
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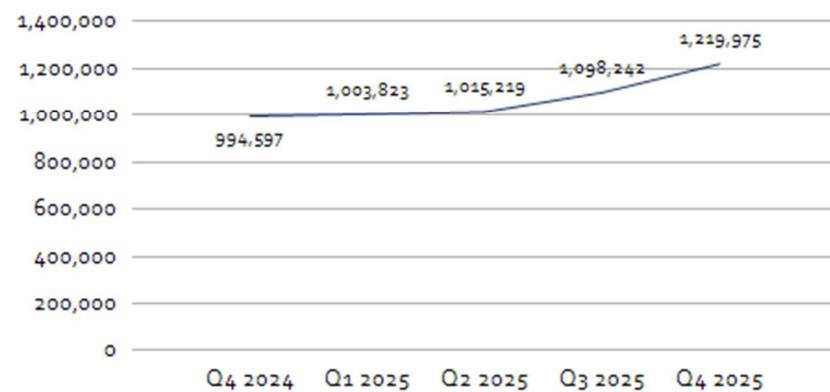
Fixed broadband Internet access service operator's market shares by number of lines



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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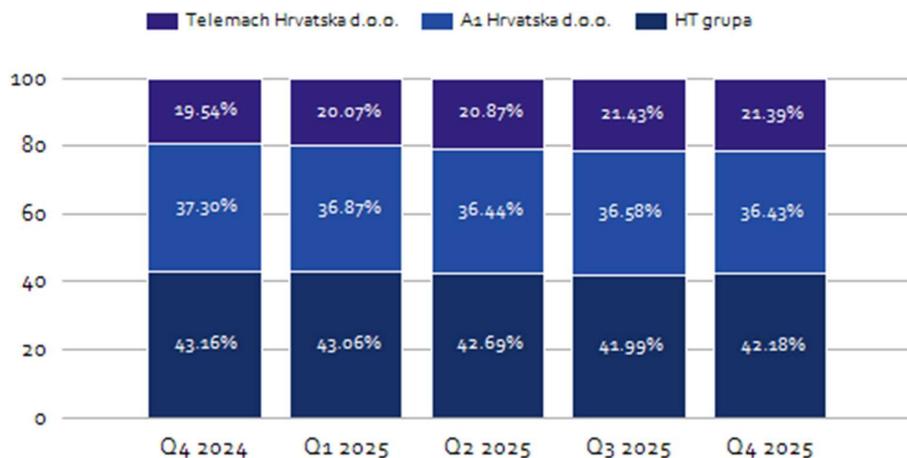


Internet access services (retail level) - mobile broadband network	Q4 2025	% Change Q4 2025 - Q3 2025	% Change Q4 2025 - Q4 2024
Mobile broadband Internet access service subscriptions (3G, 4G, 5G etc)*	6,018,163	-4.76%	4.86%
<u>Residential (3G and 4G)</u>	2,941,719	-12.81%	-6.45%
<i>Dedicated data subscriptions (cards/modems/keys etc.)</i>	96,549	-31.72%	-37.57%
<i>Mobile phones*</i>	2,702,378	-12.38%	-4.22%
<i>M2M</i>	7	40.00%	16.67%
<i>Broadband access at fixed location via mobile network</i>	142,785	-3.88%	-15.09%
<u>Residential (5G)</u>	1,496,094	7.34%	33.70%
<i>Dedicated data subscriptions (cards/modems/keys etc.)</i>	87,518	23.31%	46.47%
<i>Mobile phones</i>	1,347,764	6.27%	31.58%
<i>M2M</i>	0	NA	NA
<i>Broadband access at fixed location via mobile network</i>	60,812	11.49%	73.89%
<u>Business (3G and 4G)</u>	1,068,768	-7.11%	-6.93%
<i>Dedicated data subscriptions (cards/modems/keys etc.)</i>	122,151	-6.34%	-11.64%
<i>Mobile phones</i>	527,989	-11.37%	-12.59%
<i>M2M</i>	377,415	-1.07%	4.59%
<i>Broadband access at fixed location via mobile network</i>	41,213	-4.16%	-8.88%
<u>Business (5G)</u>	511,582	27.75%	56.19%
<i>Dedicated data subscriptions (cards/modems/keys etc.)</i>	40,463	33.25%	109.75%
<i>Mobile phones</i>	383,332	25.95%	42.85%
<i>M2M</i>	83,033	35.02%	125.31%
<i>Broadband access at fixed location via mobile network</i>	4,754	12.10%	56.38%
<u>Mobile broadband traffic (TB)</u>	413,691	-4.88%	24.59%

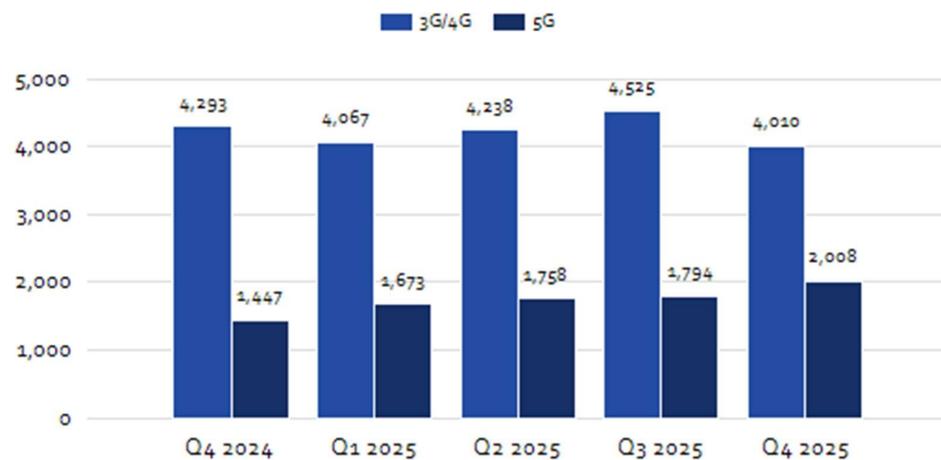
*Number of subscribers which have made an internet mobile connection in the last 90 days through mobile phones



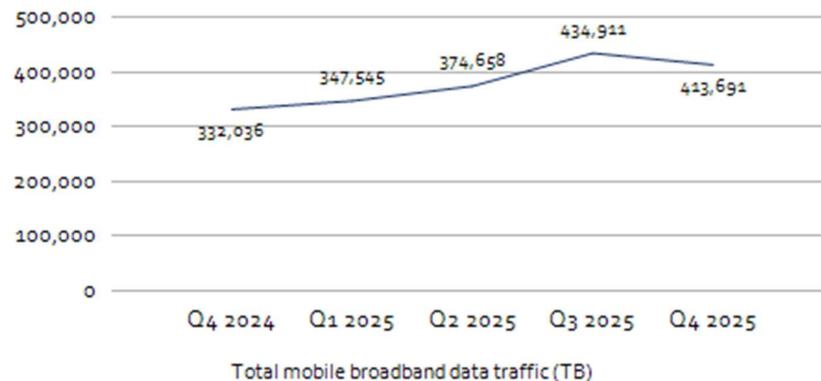
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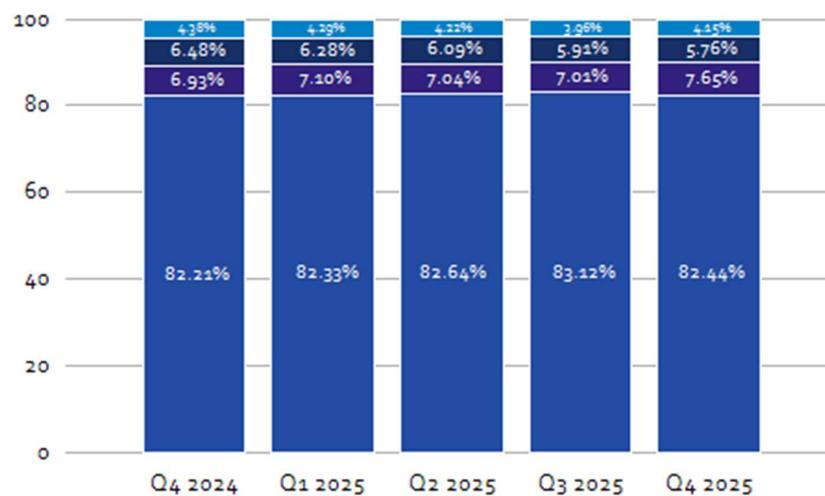
Mobile broadband Internet access service operator's market shares by number of subscriptions



Mobile broadband Internet access service subscriptions by technologies (in thousands)



Total mobile broadband data traffic (TB)



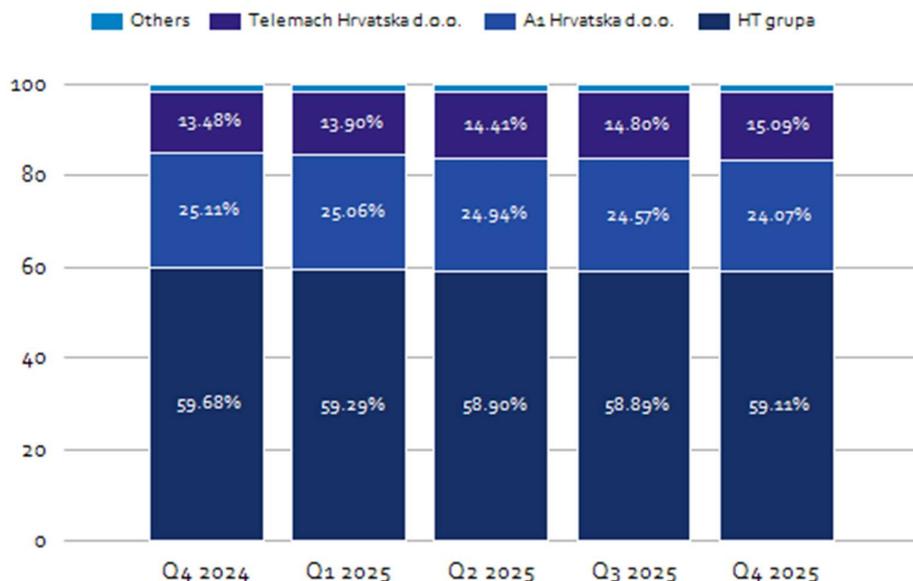
Mobile broadband Internet access service subscriptions by type of access



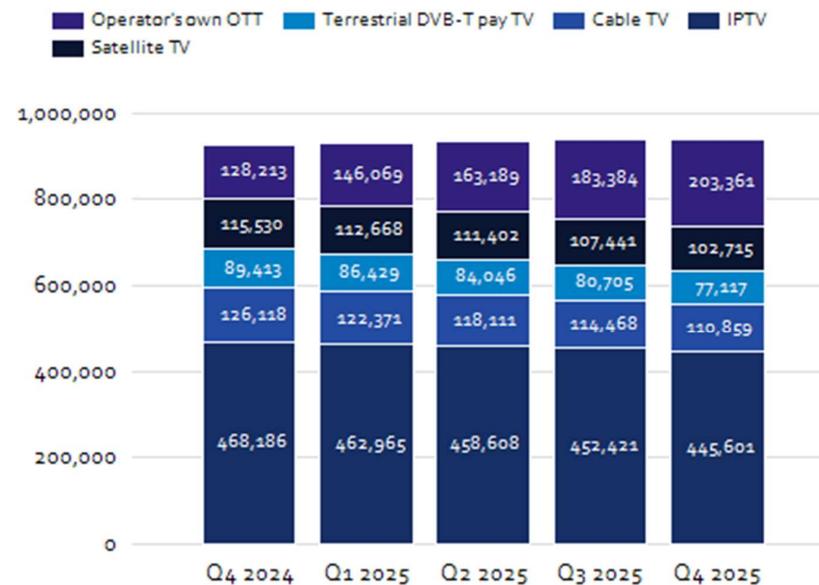
Television services	Q4 2025	% Change Q4 2025 - Q3 2025	% Change Q4 2025 - Q4 2024
Television services revenues	39,712,864.03€	2.87%	7.57%
Cable TV revenue	5,521,105.80€	1.37%	-3.65%
IPTV revenue	19,378,704.84€	-7.10%	-6.15%
Satellite TV revenue	3,855,325.62€	-1.33%	-3.38%
Digital terrestrial TV revenue	3,046,941.61€	-2.26%	-4.74%
Own OTT service revenue	7,910,786.16€	50.06%	136.19%
Total number of pay-TV subscriptions (lines)	939,653	0.13%	1.31%
Cable reception	110,859	-3.15%	-12.10%
<i>Residential</i>	107,869	-3.15%	-12.14%
<i>Business</i>	2,990	-3.42%	-10.51%
IPTV	445,601	-1.51%	-4.82%
<i>Residential</i>	418,629	-1.63%	-5.15%
<i>Business</i>	26,972	0.38%	0.53%
Satellite reception (SAT TV)	102,715	-4.40%	-11.09%
<i>Residential</i>	94,849	-3.65%	-11.38%
<i>Business</i>	7,866	-12.63%	-7.43%
Digital terrestrial reception – pay TV	77,117	-4.45%	-13.75%
<i>Residential</i>	76,240	-4.44%	-13.79%
<i>Business</i>	877	-4.78%	-10.42%
Own OTT service	203,361	10.89%	58.61%
<i>Residential</i>	190,228	11.34%	60.49%
<i>Business</i>	13,133	4.85%	35.66%



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Pay TV operator's market shares by number of subscriptions



Pay TV subscriptions by technologies

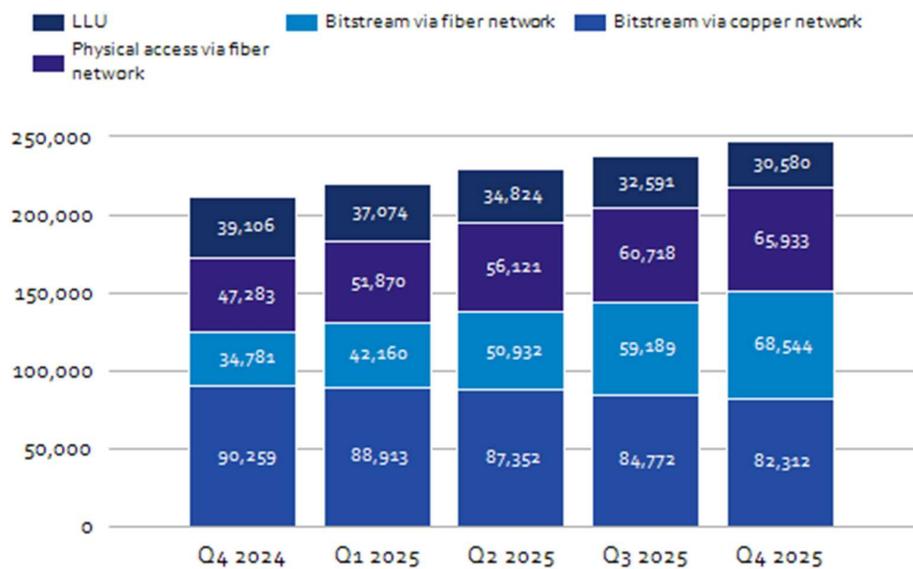
Television services - bundles	Q4 2025	% Change Q4 2025 - Q3 2025	% Change Q4 2025 - Q4 2024
Broj korisnika samostalne usluge naplatne televizije	246,346	-2.60%	-4.69%
Broj korisnika 2D paketa s uslugom naplatne televizije	88,127	-3.63%	-5.71%
Broj korisnika 3D paketa s uslugom naplatne televizije	325,719	1.77%	4.22%
Broj korisnika 4D paketa s uslugom naplatne televizije	274,760	2.05%	6.13%



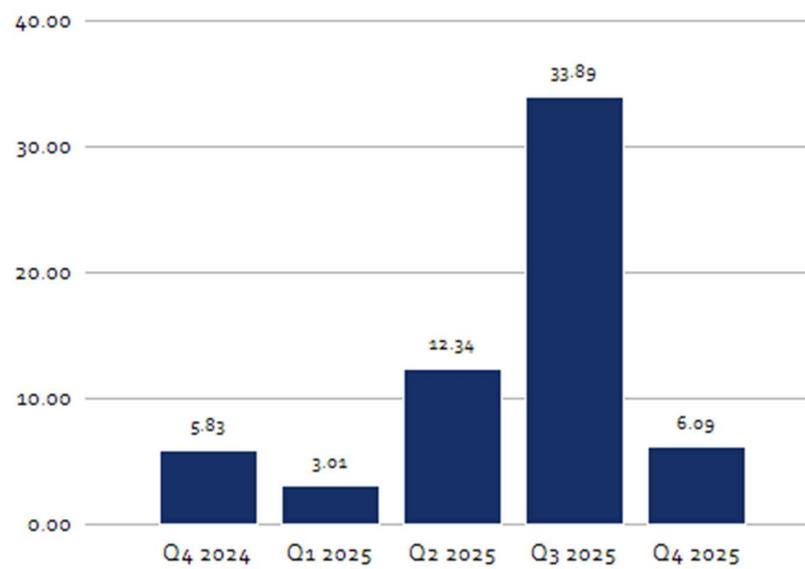
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Wholesale broadband access	Q4 2025	% Change Q4 2025 - Q3 2025	% Change Q4 2025 - Q4 2024
Wholesale broadband access services via copper network revenues	2,819,735.45€	-3.83%	-11.34%
Wholesale broadband access services via fiber network revenues	4,169,977.66€	13.95%	68.30%
Data roaming revenues	6,089,016.45€	-82.04%	4.39%
Physical wholesale access via copper network(LLU)-number of lines	30,580	-6.17%	-21.80%
Bitstream wholesale access via copper network-number of lines	82,312	-2.90%	-8.80%
Physical wholesale access via fiber network (unbundled fiber at distribution node) -number of lines	65,933	8.59%	39.44%
Bitstream wholesale access via fiber networks - number of lines	68,544	15.81%	97.07%



Wholesale broadband access by type of service



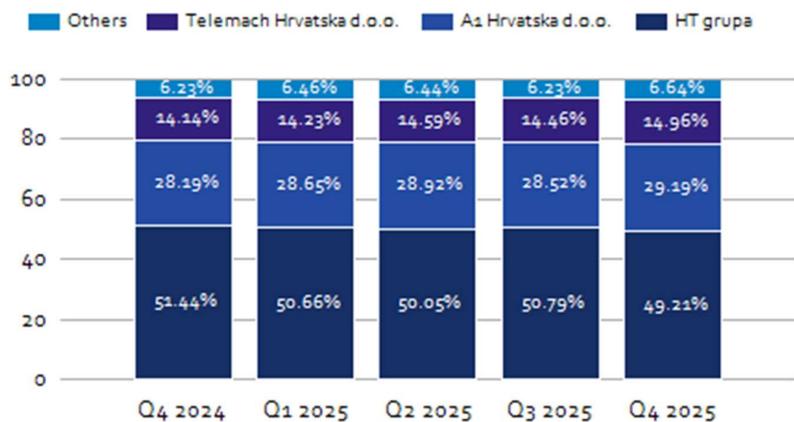
Data roaming revenues (millions EUR)



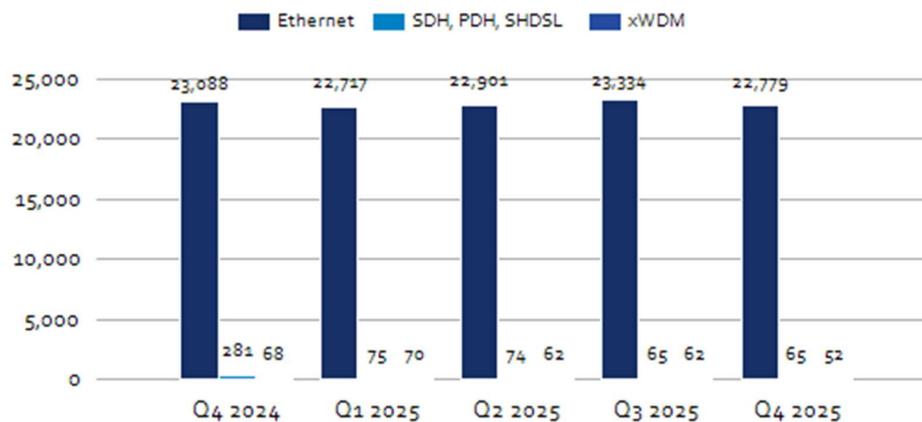
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Dedicated capacity services (high-quality access) - retail level*	Q4 2025	% Change Q4 2025 - Q3 2025	% Change Q4 2025 - Q4 2024
Traditional digital lines (SDH, PDH, (S)HDSL revenue	95,915.77€	-1.13%	-64.94%
Ethernet technology services revenue	7,869,387.85€	-0.78%	4.65%
xWDM technology services revenue	409,346.97€	9.71%	16.56%
"Dark fiber" services revenue	531,644.28€	25.94%	32.73%
Total number of connection points of traditional digital lines (SDH, PDH, (S)HDSL)	65	0.00%	-76.87%
Total number of Ethernet technology connection points	22,779	-2.38%	-1.34%
Total number of xWDM technology connection points	52	-16.13%	-23.53%
Total length of fiber as a part of "dark fiber" service (km)	5,026	4.53%	-0.16%



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



Dedicated capacity market connection points by technologies*

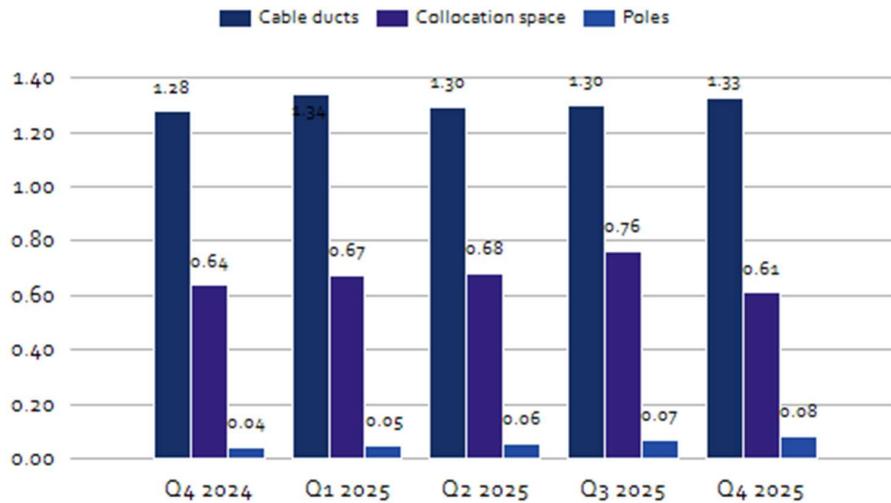
*From Q3 2024, the report no longer includes data from the operator HEP Telekomunikacije d.o.o., which provides services exclusively to companies within the HEP Group.



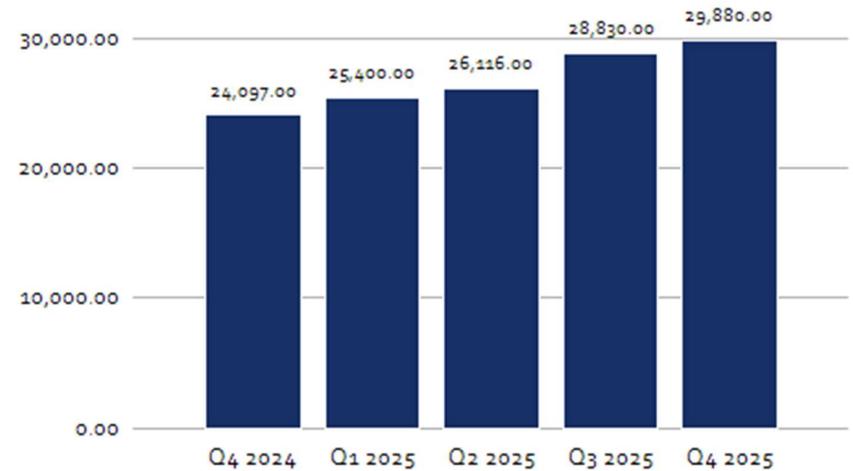
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Shared use of electronic communications infrastructure	Q4 2025	% Change Q4 2025 - Q3 2025	% Change Q4 2025 - Q4 2024
Cable duct system shared use revenue	1,326,383.46€	2.08%	3.86%
Poles for installation of aerial network cables rental revenue	84,150.55€	21.21%	99.97%
Colocation spaces rental revenue	610,175.32€	-20.13%	-4.24%
Total length of shared use cable duct systems (km)	29,880	3.64%	24.00%
Pipes length, 63-110 mm diameter (km)	7,701	NA	48.18%
Pipes length, 50 mm diameter (km)	3,501	34.97%	367.42%
Pipes length, 20-40 mm diameter (km)	7,049	-0.27%	7.42%
Pipes length, 3-16 mm diameter (km)	11,629	-1.93%	0.35%
Total number of rented poles for the installation of aerial network cables	6,478	5.52%	31.08%



Shared use of electronic communications infrastructure revenues (millions EUR)



Total length of shared cable ducts (km)