



Quarterly data on the electronic communications market in the Republic of Croatia for 2.quarter 2026.

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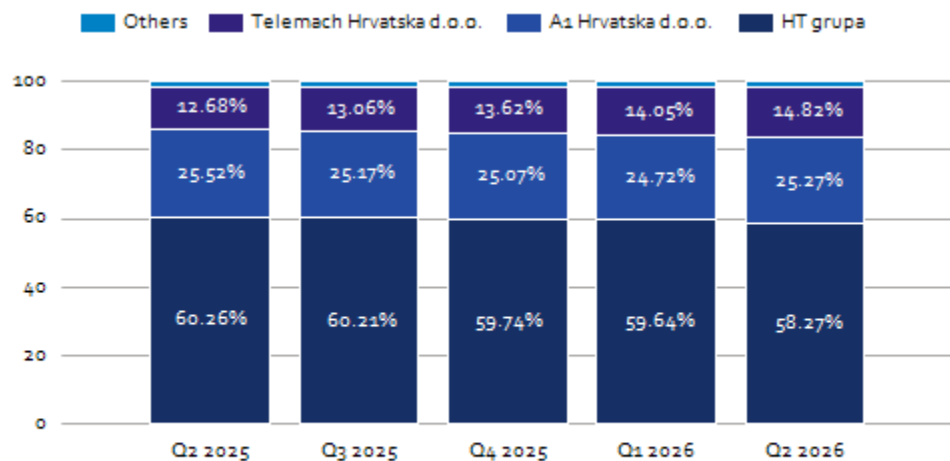
This report presents the quarterly indicators of the development of the electronic communications market. The report is based on regularly collected data from all operators in the electronic communications market in the Republic of Croatia. In some cases, HAKOM cannot detect inaccuracies in the reports/data 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 Q2 2026

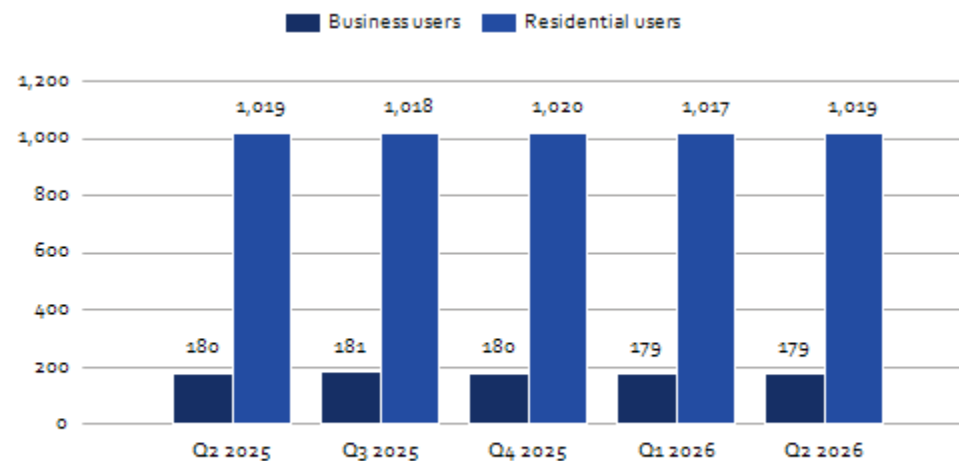
- In the first half of 2026, revenues from electronic communications services amounted to EUR 920 million, representing a 3.5 percent increase compared to the same period of the previous year. Revenues from mobile network services increased by 3.37 percent, while revenues from fixed network services rose by 3.73 percent.
- The trend of user migration to fiber networks continued in the second quarter of 2026. The number of fiber broadband lines reached 523,888, accounting for 43.31 percent of the total 1,208,441 broadband lines. The total number of VHCN lines reached 665,267, representing an increase of 99,517 lines compared with the same period of the previous year. The share of users subscribing to access speeds exceeding 300 Mbit/s amounted to 46.11 percent of the total number of broadband lines.
- The continued decline in the use of publicly available fixed telephone services is reflected in a year-on-year decrease of 3.2 percent in the number of users and a 6.8 percent reduction in total outgoing traffic. At the same time, the number of connections remained broadly stable, recording only a slight decline of 0.1 percent, while revenues increased by 2.3 percent.
- In the publicly available mobile telephone service segment, total revenues recorded a modest increase of 0.3 percent, while the number of users grew by 2.4 percent. Total outgoing traffic increased by 0.8 percent, while the use of SMS services continued to decline, with the number of SMS messages sent falling by 11.9 percent. This reflects changing user habits and an increasing reliance on internet-based communication platforms.
- The pay television market continues to be shaped by the strong expansion of OTT services. In the second quarter, the total number of subscriptions reached 953,606, representing a year-on-year increase of 1.9 percent. While traditional platforms continued to lose subscribers, with cable television declining by 10.7 percent, Internet Protocol television (IPTV) by 5.4 percent, satellite television by 11.9 percent and digital terrestrial pay television by 16.2 percent, subscriptions to operators' own OTT services grew by 50.6 percent. Total pay television service revenues reached EUR 40.1 million, up 3.5 percent compared with the same quarter of the previous year. This increase was largely supported by the continued strong performance of operators' own OTT services, whose revenues rose by 125.1 percent.



Fixed telephony services	Q2 2026	% Change Q2 2026 - Q1 2026	% Change Q2 2026 - Q2 2025
Total fixed telephony services revenue	27,325,958.72€	5.34 %	2.33%
Retail revenue	25,955,593.64€	5.17%	3.87%
Wholesale revenue	1,370,365.08€	8.64%	-20.02%
Total number of fixed lines*	1,198,635	0.23%	-0.08%
Number of subscribers	1,059,596	-2.38%	-3.20%
Fixed originating voice minutes (min)**	180,574,193	-2.83%	-6.83%



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



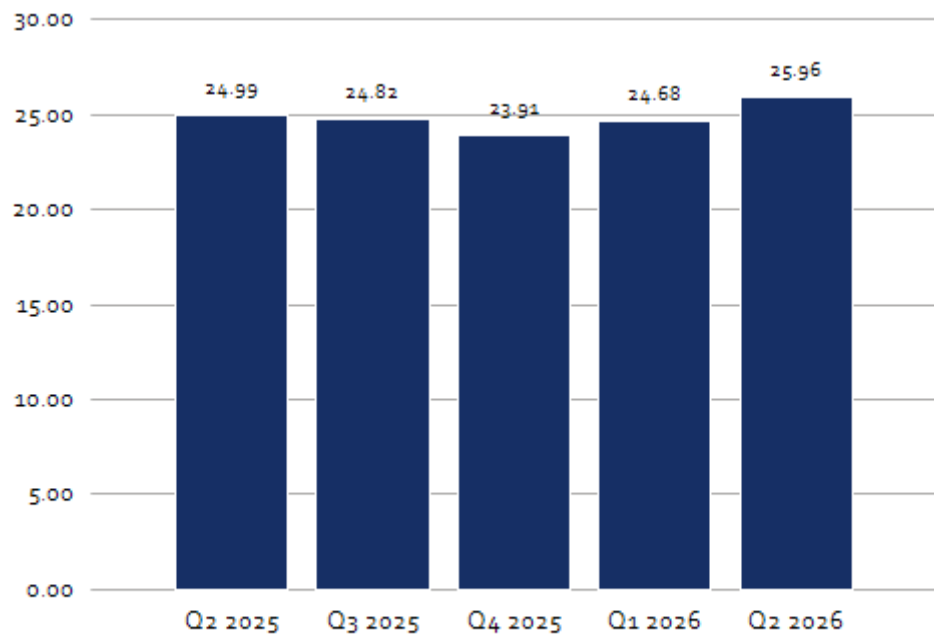
Fixed telephony lines (in thousands)

*CPS (carrier pre-selection) subscribers are included

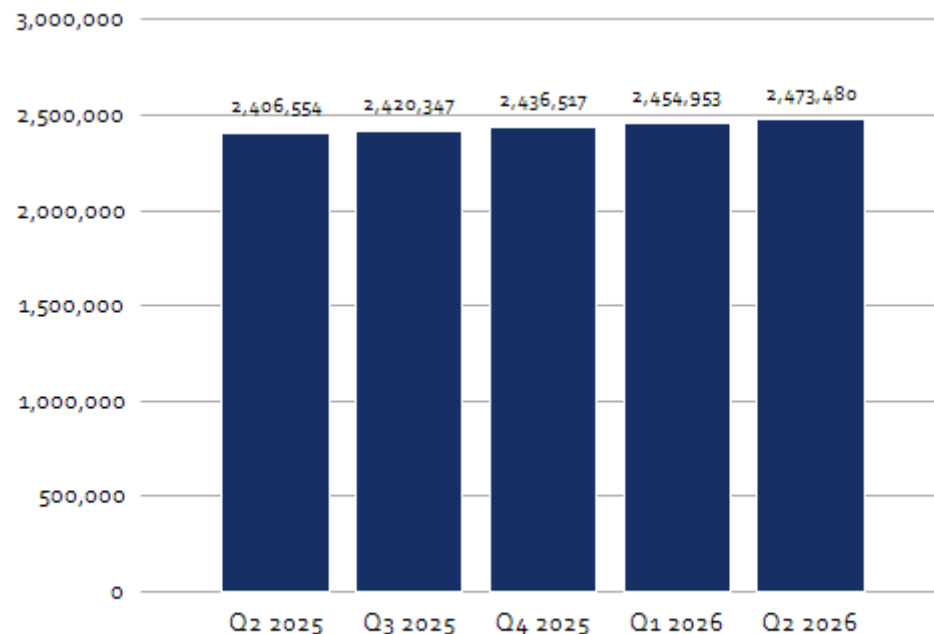
**Includes all types of calls (local, national, international calls, calls to mobile networks and calls to VAS numbers)



Fixed telephony services - bundles	Q2 2026	% Change Q2 2026 - Q1 2026	% Change Q2 2026 - Q2 2025
Stand-alone – fixed voice telephony subscribers	146,447	-2.62%	-12.43%
Number of bundled services subscribers – 2D	216,870	-1.51%	-13.89%
Number of bundled services subscribers – 3D	358,975	0.38%	-4.45%
Number of bundled services subscribers – 4D	331,055	1.05%	24.13%



Fixed telephony service retail revenue (millions EUR)



Fixed telephony ported numbers



Mobile telephony services	Q2 2026	% Change Q2 2026 - Q1 2026	% Change Q2 2026 - Q2 2025
Total mobile telephony services revenues	141,550,574.29€	-1.17%	0.28%
Retail revenue	129,798,451.55€	-1.92%	1.50%
Retail revenue - Residential	95,946,206.90€	-1.23%	2.63%
Prepaid subscribers	20,023,852.17€	3.49%	-0.92%
Postpaid subscribers	75,922,354.73€	-2.40%	3.61%
Retail revenue - Business	33,852,244.65€	-3.85%	-1.56%
Wholesale revenue	11,752,122.74€	7.95%	-11.50%
Total number of active subscribers (3G, 4G, 5G)*	5,075,372	2.23%	2.44%
Residential	4,149,102	2.51%	2.08%
Prepaid subscribers	1,636,487	4.60%	-0.58%
Postpaid subscribers	2,512,615	1.19%	3.89%
Business	926,270	1.01%	4.11%
Mobile penetration**	131.08%	2.23%	2.44%
Mobile originating voice minutes (min)***	2,698,223,941	1.91%	0.79%
International roaming traffic - own subscribers (min)	80,132,416	-5.35%	-19.21%
International roaming traffic - foreign subscribers (min)	148,702,354	163.46%	-29.40%
Total SMS sent	144,884,455	5.50%	-11.85%
Total MMS sent	1,250,107	10.00%	3.69%

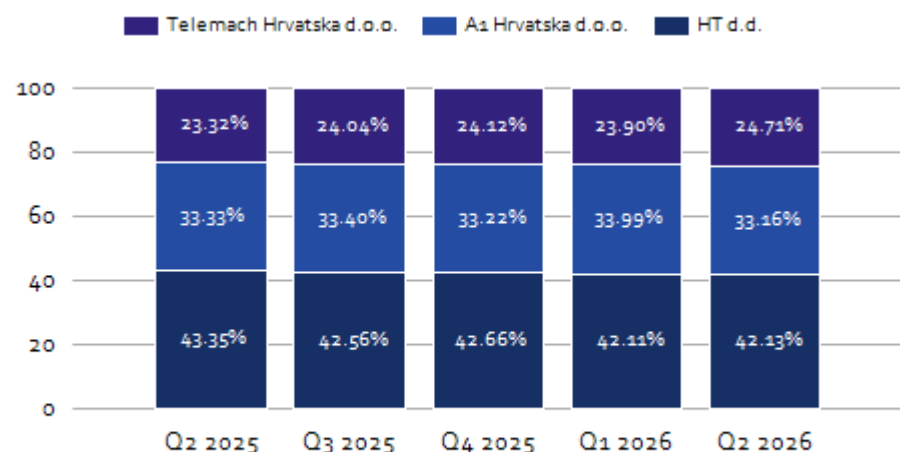
*Definition of active pre-paid subscriber: Subscriber who has used a mobile service or refilled the account in the last 90 days

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

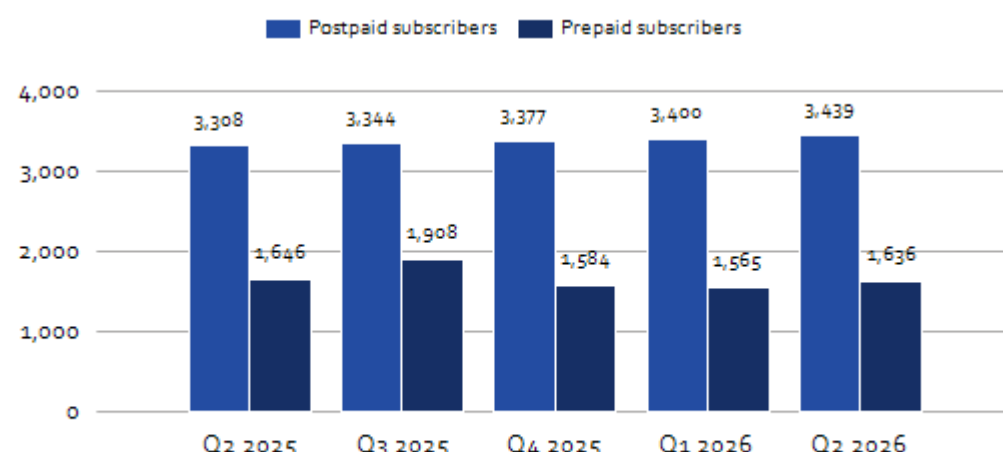
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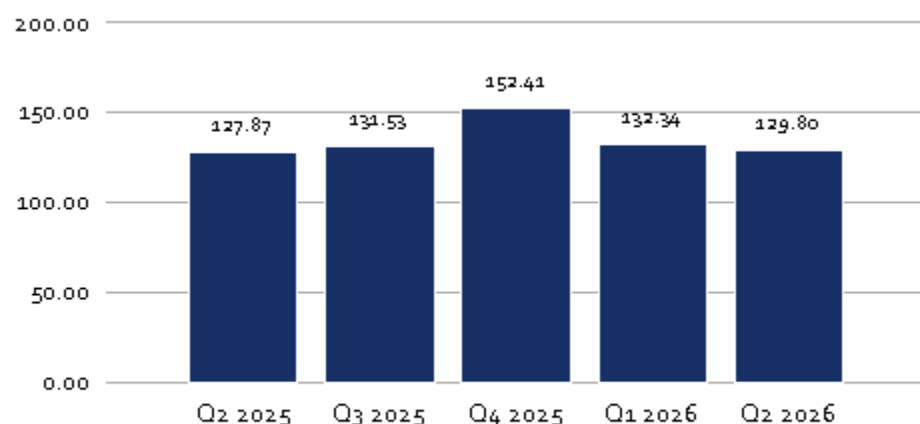
Quarterly data on the electronic communications market in the Republic of Croatia for 2.quarter 2026.



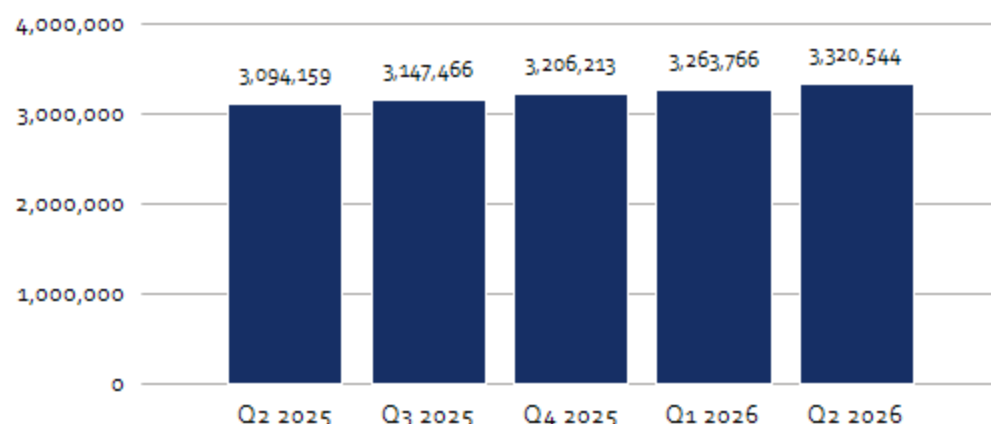
Mobile telephony operator's market shares by number of subscribers



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



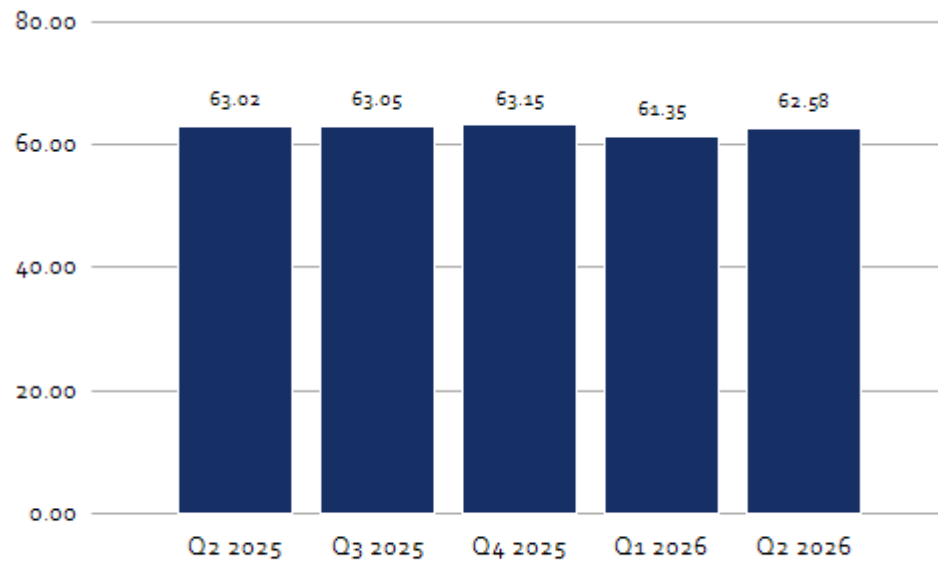
Mobile telephony service retail revenue (millions EUR)



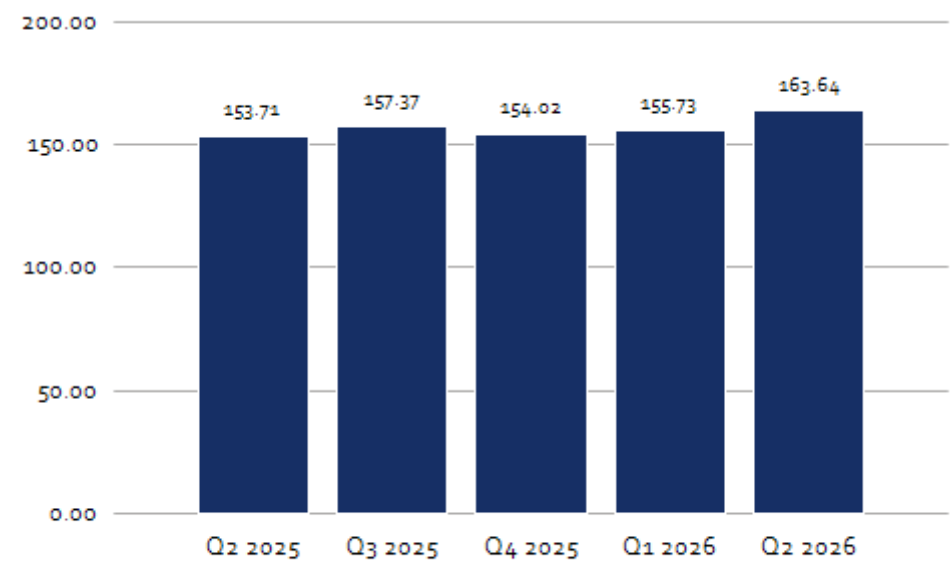
Mobile telephony ported numbers



Internet access service (retail level) - revenues and total subscriptions	Q2 2026	% Change Q2 2026 - Q1 2026	% Change Q2 2026 - Q2 2025
Total broadband Internet access services revenues	228,424,197.28€	4.39%	4.86%
Fixed broadband Internet access service revenue	62,575,860.27€	2.00%	-0.71%
Mobile broadband Internet access service revenue	163,638,542.18€	5.08%	6.46%
Satellite access revenue	2,209,794.83€	26.66%	99.39%
Total number of broadband subscriptions (lines)	7,371,711	2.08%	2.93%



Fixed broadband Internet access service retail revenues (millions EUR)



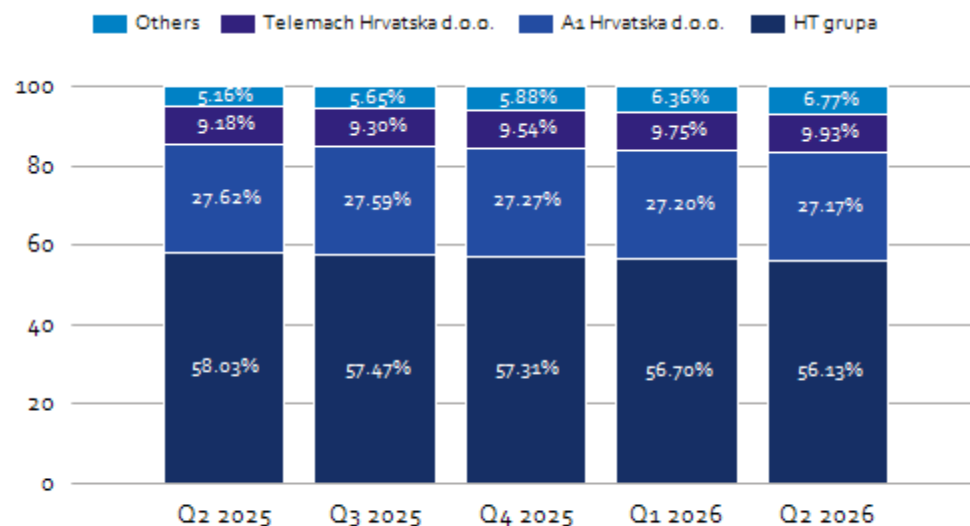
Mobile broadband Internet access service retail revenues (millions EUR)



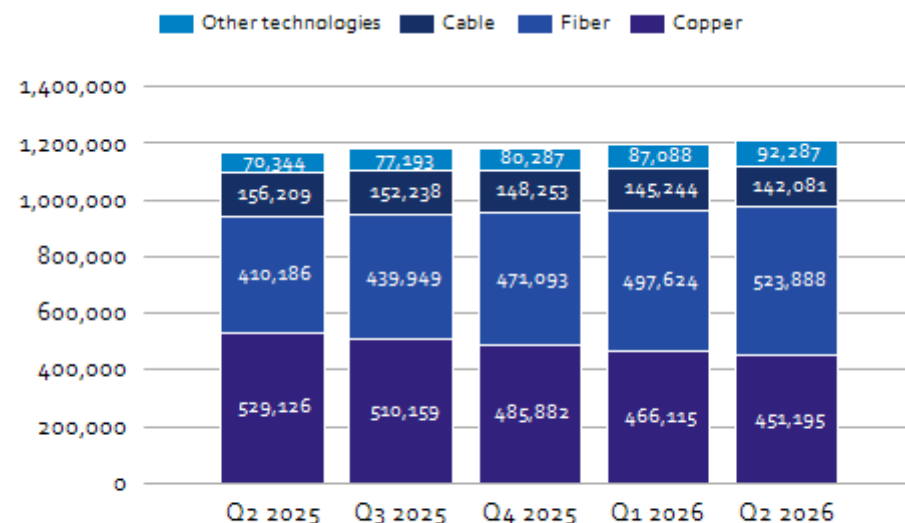
Internet access services (retail level) - fixed broadband network	Q2 2026	% Change Q2 2026 - Q1 2026	% Change Q2 2026 - Q2 2025
Fixed broadband Internet access service subscriptions (lines)*	1,208,441	1.06%	3.65%
<u>Copper access network</u>	451,195	-3.20%	-14.73%
<i>Access over own copper access network</i>	356,383	-3.38%	-15.02%
<i>xDSL based broadband using full local-loop unbundling</i>	22,045	-5.62%	-23.03%
<i>xDSL based broadband using shared access</i>	2	0.00%	0.00%
<i>Bitstream access over copper access network (xDSL)</i>	72,765	-1.53%	-10.29%
<u>Fiber optic access network</u>	523,888	5.28%	27.72%
<i>Access over own fiber access network</i>	370,912	4.33%	21.07%
<i>Fiber unbundling access</i>	73,228	5.44%	32.87%
<i>Bitstream access over fiber optic access network</i>	79,748	9.76%	63.70%
<u>Cable access network</u>	142,081	-2.18%	-9.04%
<u>Fixed wireless access (FWA)</u>	59,692	-0.54%	10.37%
<u>Satellite access</u>	22,134	24.80%	204.29%
<u>High Quality Access</u>	9,451	1.22%	5.27%
<u>Fixed broadband traffic (TB)</u>	1,309,682	-0.74%	29.00%

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

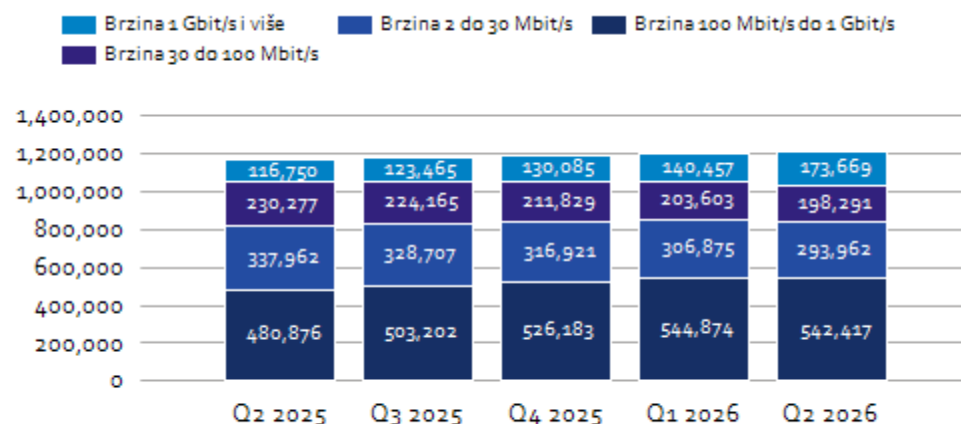
Internet access services (retail level) - bundles	Q2 2026	% Change Q2 2026 - Q1 2026	% Change Q2 2026 - Q2 2025
Number of standalone internet access service subscribers	4,834,676	2.04%	-3.42%
Number of bundled services subscribers – 2D	436,915	0.63%	-2.08%
Number of bundled services subscribers – 3D	425,260	0.37%	-2.44%
Number of bundled services subscribers – 4D	331,055	1.05%	24.13%



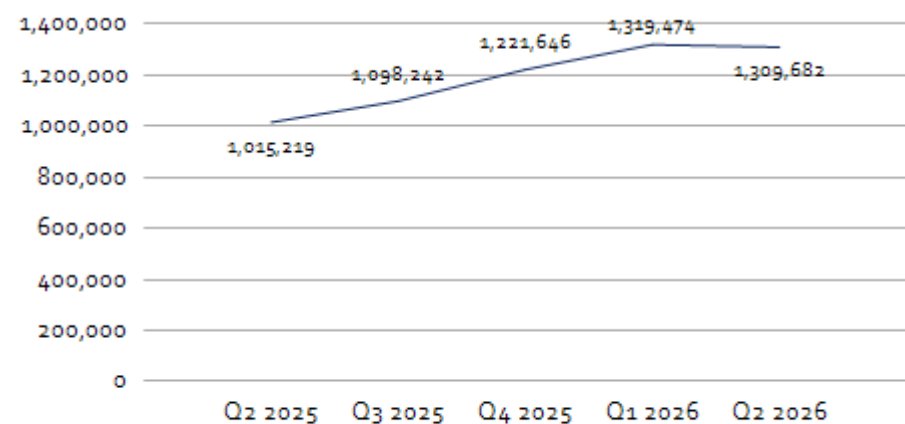
Fixed broadband Internet access service operator's market shares by number of lines



Fixed broadband Internet access service by technologies



Fixed broadband Internet access service by download speeds



Total fixed broadband data traffic (TB)

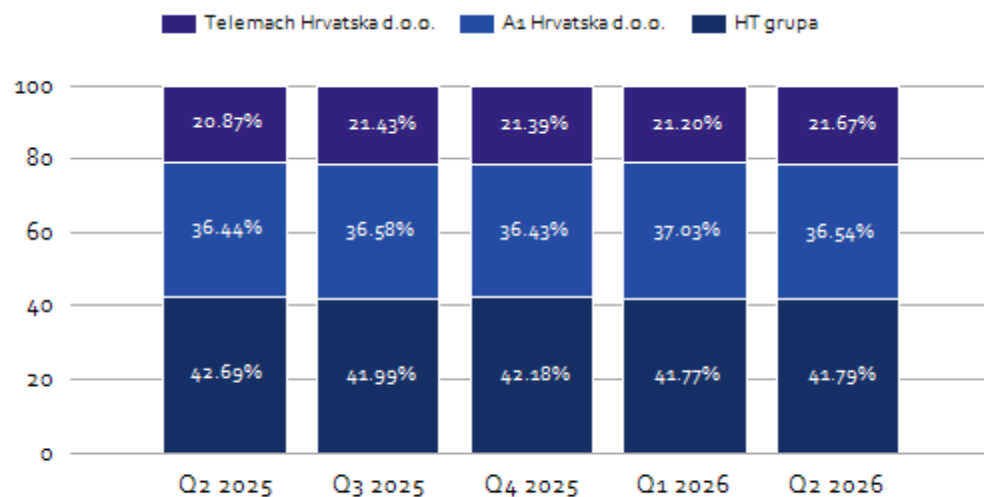


Internet access services (retail level) - mobile broadband network	Q2 2026	% Change Q2 2026 - Q1 2026	% Change Q2 2026 - Q2 2025
Mobile broadband Internet access service subscriptions (3G, 4G, 5G etc)*	6,162,260	2.27%	2.77%
<u>Residential (3G and 4G)</u>	2,309,324	-1.84%	-26.25%
<i>Dedicated data subscriptions (cards/modems/keys etc.)</i>	112,938	18.95%	-21.31%
<i>Mobile phones*</i>	2,056,641	-2.84%	-27.33%
<i>M2M</i>	9	28.86%	80.40%
<i>Broadband access at fixed location via mobile network</i>	139,736	-0.93%	-11.16%
<u>Residential (5G)</u>	2,247,233	7.87%	67.03%
<i>Dedicated data subscriptions (cards/modems/keys etc.)</i>	99,655	10.52%	59.29%
<i>Mobile phones</i>	2,079,211	7.63%	68.33%
<i>M2M</i>	0	N/A	N/A
<i>Broadband access at fixed location via mobile network</i>	68,367	11.63%	43.35%
<u>Business (3G and 4G)</u>	910,931	-3.24%	-17.74%
<i>Dedicated data subscriptions (cards/modems/keys etc.)</i>	111,362	-2.08%	-14.20%
<i>Mobile phones</i>	414,519	-3.64%	-27.54%
<i>M2M</i>	344,898	-3.30%	-4.47%
<i>Broadband access at fixed location via mobile network</i>	40,152	-1.63%	-9.60%
<u>Business (5G)</u>	694,772	7.15%	68.57%
<i>Dedicated data subscriptions (cards/modems/keys etc.)</i>	61,262	17.77%	108.91%
<i>Mobile phones</i>	511,737	5.11%	61.12%
<i>M2M</i>	116,576	11.02%	90.06%
<i>Broadband access at fixed location via mobile network</i>	5,197	15.13%	34.29%
<u>Mobile broadband traffic (TB)</u>	506,015	7.71%	29.45%

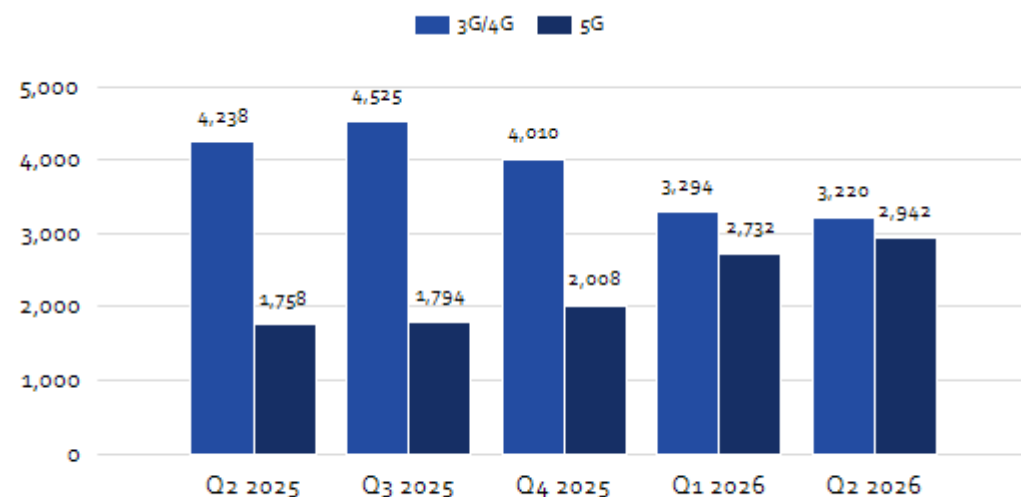
*Number of subscribers which have made an internet mobile connection in the last 90 days through mobile phones



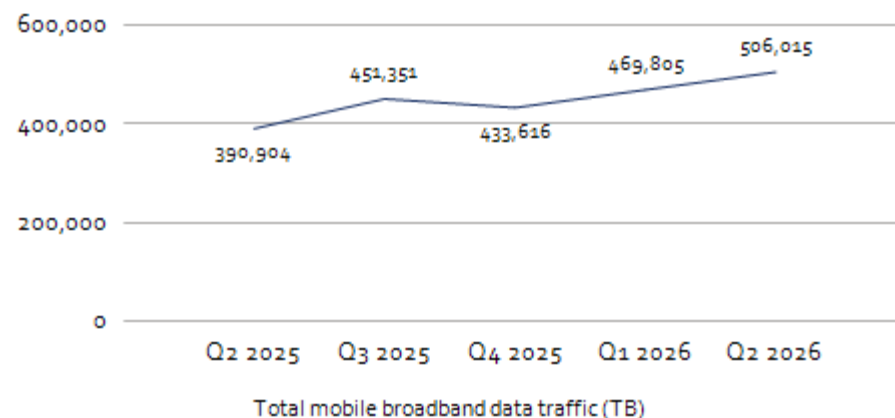
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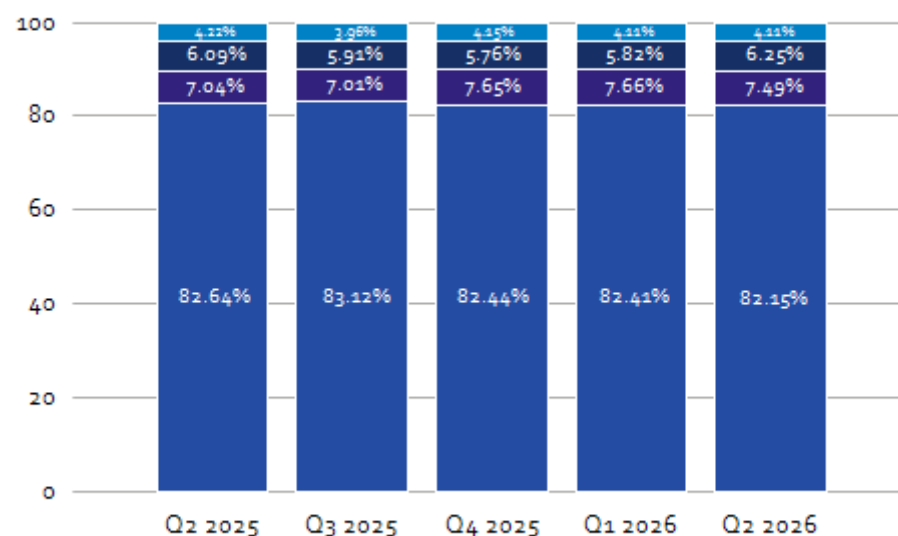
Mobile broadband Internet access service operator's market shares by number of subscriptions



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



Total mobile broadband data traffic (TB)



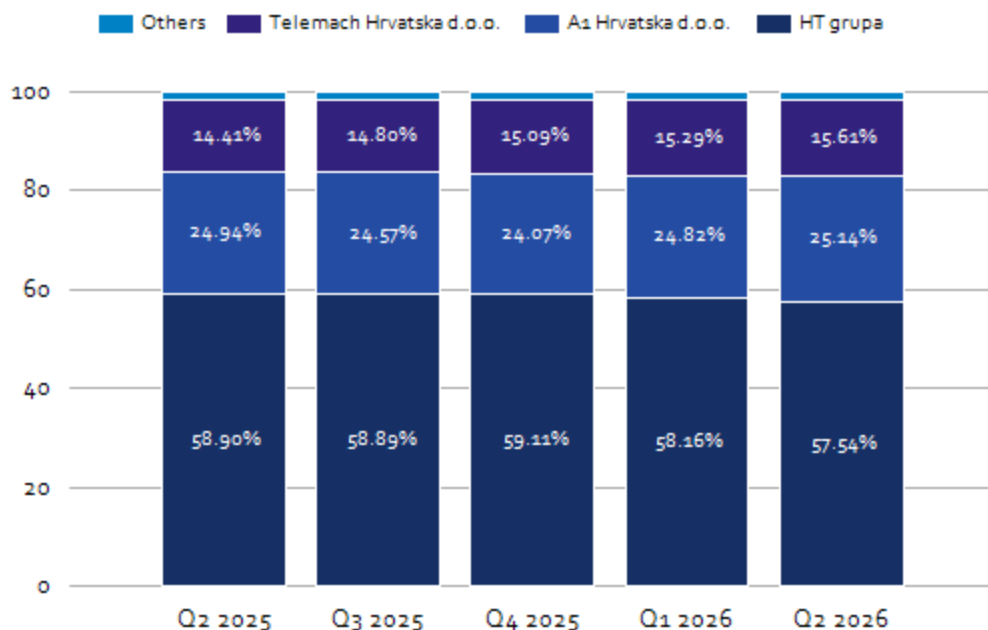
Mobile broadband Internet access service subscriptions by type of access



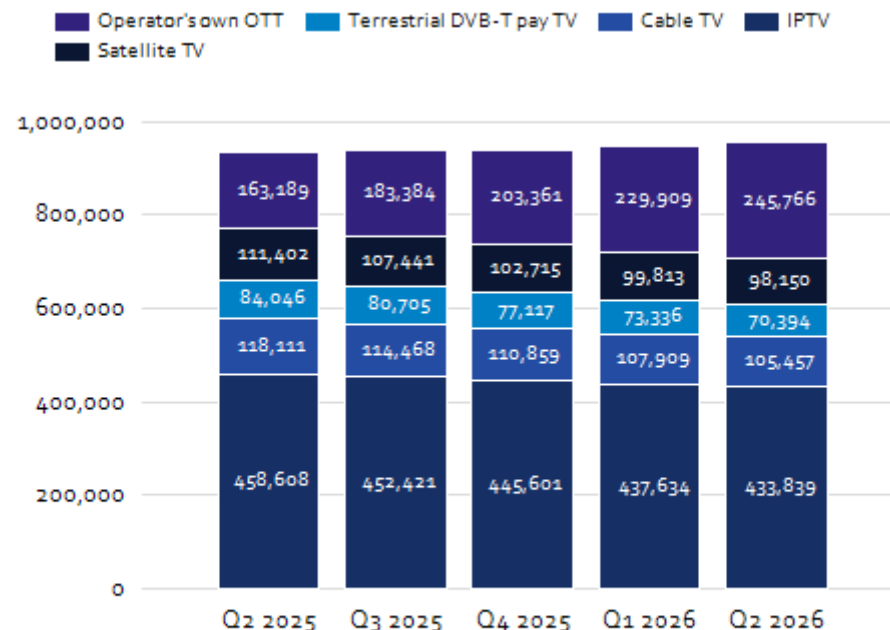
Television services	Q2 2026	% Change Q2 2026 - Q1 2026	% Change Q2 2026 - Q2 2025
Television services revenues	40,121,070.05€	3.21%	3.45%
Cable TV revenue	5,010,503.98€	-5.17%	-17.43%
IPTV revenue	18,772,679.19€	1.95%	-12.08%
Satellite TV revenue	3,781,858.11€	2.06%	-3.21%
Digital terrestrial TV revenue	2,839,229.66€	-1.99%	-9.49%
Own OTT service revenue	9,716,799.11€	13.32%	125.14%
Total number of pay-TV subscriptions (lines)	953,606	0.53%	1.95%
Cable reception	105,457	-2.27%	-10.71%
<i>Residential</i>	102,608	-2.25%	-10.72%
<i>Business</i>	2,849	-2.90%	-10.55%
IPTV	433,839	-0.87%	-5.40%
<i>Residential</i>	406,113	-1.09%	-5.91%
<i>Business</i>	27,726	2.49%	2.67%
Satellite reception (SAT TV)	98,150	-1.67%	-11.90%
<i>Residential</i>	89,714	-2.32%	-12.22%
<i>Business</i>	8,436	5.90%	-8.34%
Digital terrestrial reception – pay TV	70,394	-4.01%	-16.24%
<i>Residential</i>	69,549	-4.05%	-16.30%
<i>Business</i>	845	-0.71%	-11.61%
Own OTT service	245,766	6.90%	50.60%
<i>Residential</i>	231,934	7.24%	52.48%
<i>Business</i>	13,832	1.39%	24.80%



Quarterly data on the electronic communications market in the Republic of Croatia for 2.quarter 2026.



Pay TV operator's market shares by number of subscriptions

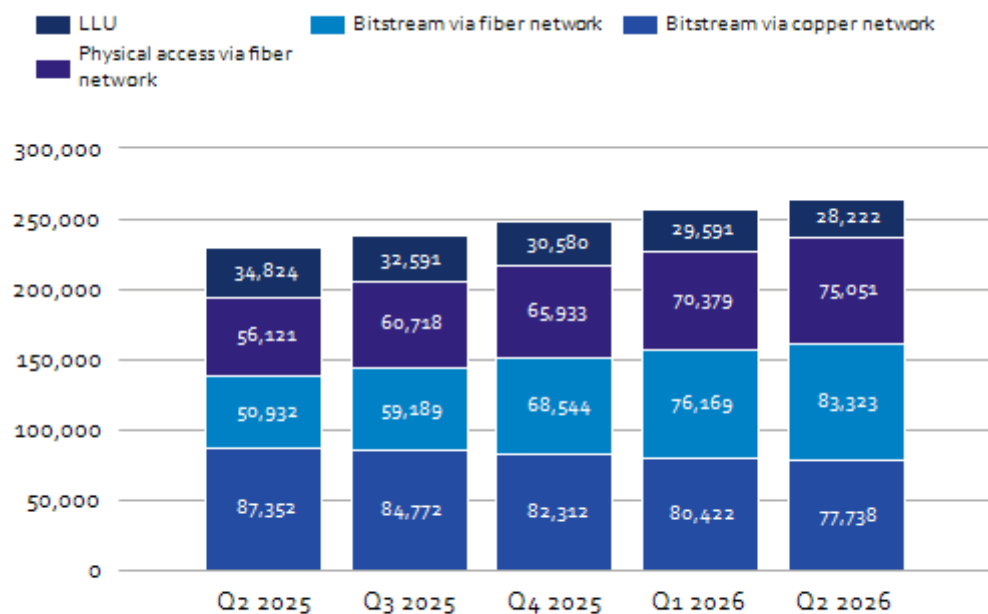


Pay TV subscriptions by technologies

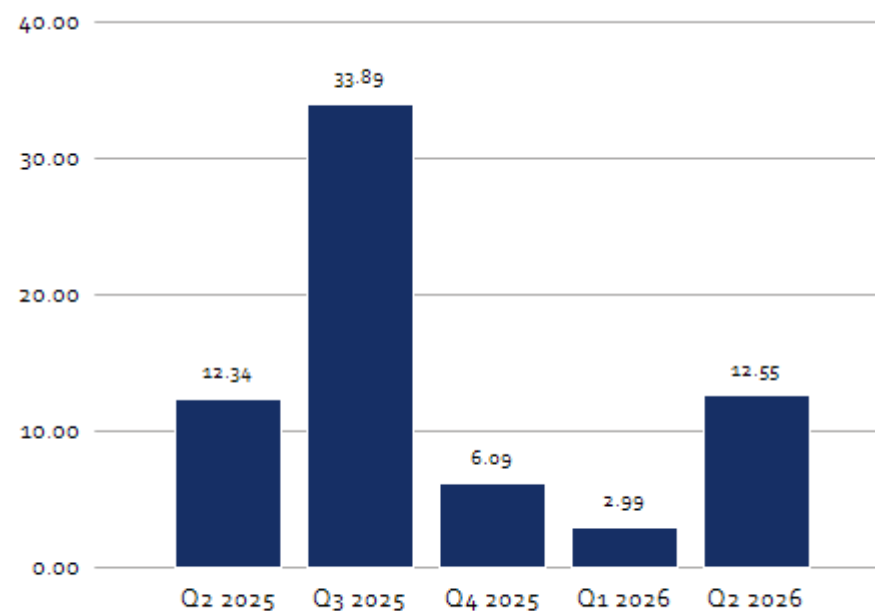
Television services - bundles	Q2 2026	% Change Q2 2026 - Q1 2026	% Change Q2 2026 - Q2 2025
Broj korisnika samostalne usluge naplatne televizije	211,425	-1.41%	-16.39%
Broj korisnika 2D paketa s uslugom naplatne televizije	110,277	-0.94%	16.79%
Broj korisnika 3D paketa s uslugom naplatne televizije	283,999	1.28%	-10.93%
Broj korisnika 4D paketa s uslugom naplatne televizije	331,055	1.05%	24.13%



Wholesale broadband access	Q2 2026	% Change Q2 2026 - Q1 2026	% Change Q2 2026 - Q2 2025
Wholesale broadband access services via copper network revenues	2,666,304.84€	-2.22%	-11.80%
Wholesale broadband access services via fiber network revenues	4,808,341.15€	9.51%	46.87%
Data roaming revenues	12,550,914.25€	319.22%	1.69%
Physical wholesale access viacopper network(LLU)-number of lines	28,222	-4.63%	-18.96%
Bitstream wholesale access via copper network-number of lines	77,738	-3.34%	-11.01%
Physical wholesale access via fiber network (unbundled fiber at distribution node) -number of lines	75,051	6.64%	33.73%
Bitstream wholesale access via fiber networks - number of lines	83,323	9.39%	63.60%



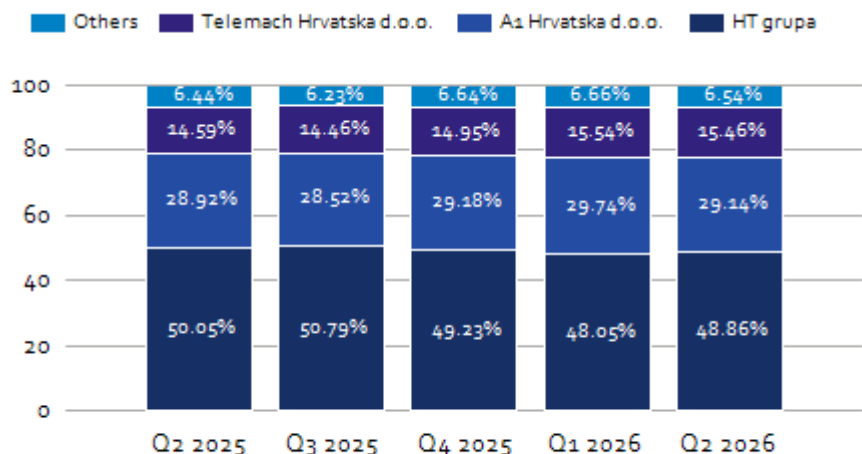
Wholesale broadband access by type of service



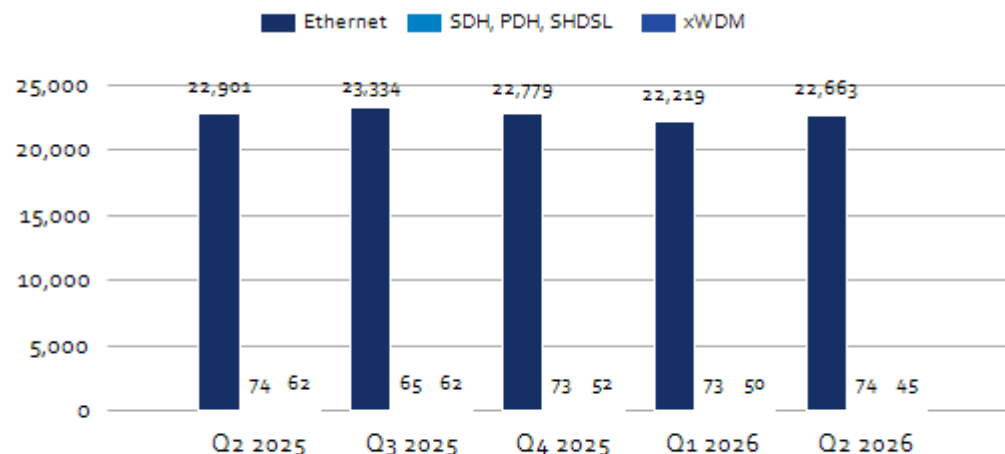
Data roaming revenues (millions EUR)



Dedicated capacity services (high-quality access) - retail level*	Q2 2026	% Change Q2 2026 - Q1 2026	% Change Q2 2026 - Q2 2025
Traditional digital lines (SDH, PDH, (S)HDSL revenue	104,020.35€	-2.45%	6.36%
Ethernet technology services revenue	7,903,035.62€	-0.03%	0.73%
xWDM technology services revenue	362,823.72€	-10.27%	-2.61%
"Dark fiber" services revenue	561,079.72€	12.47%	27.36%
Total number of connection points of traditional digital lines (SDH, PDH, (S)HDSL)	74	1.37%	0.00%
Total number of Ethernet technology connection points	22,663	2.00%	-1.04%
Total number of xWDM technology connection points	45	-10.00%	-27.42%
Total length of fiber as a part of "dark fiber" service (km)	6,377	73.38%	33.72%



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

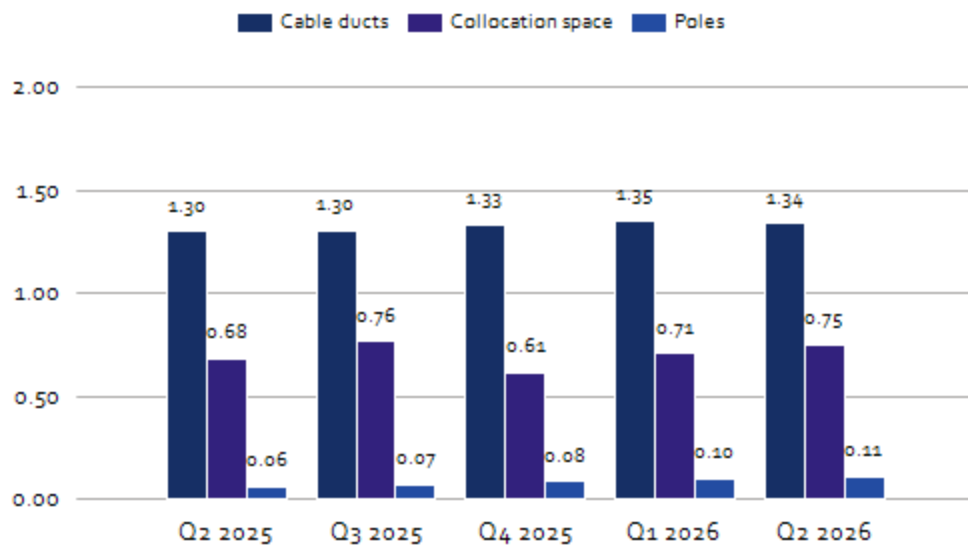


Dedicated capacity market connection points by technologies*

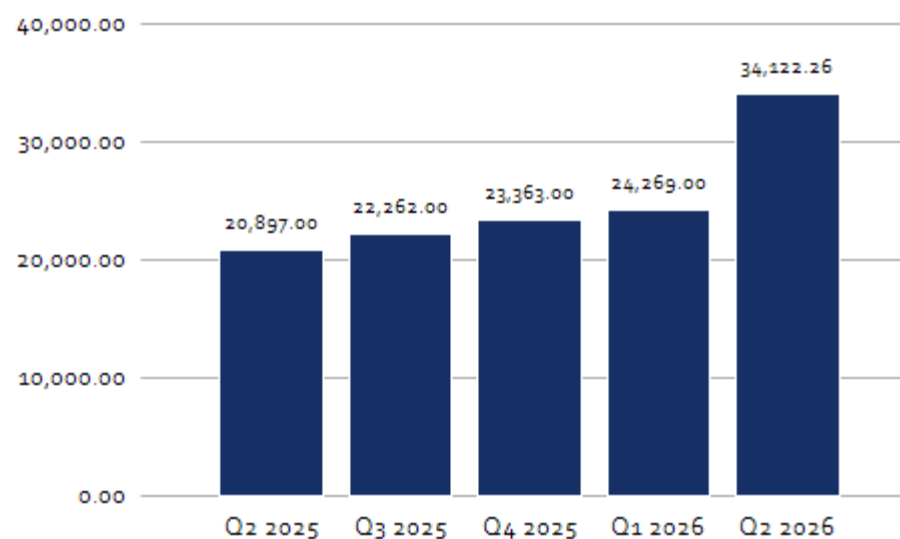
*From Q3 2024, the report no longer includes data from the operator HEP Telekomunikacije d.o.o., which provides services exclusively to companies within the HEP Group.



Shared use of electronic communications infrastructure	Q2 2026	% Change Q2 2026 - Q1 2026	% Change Q2 2026 - Q2 2025
Cable duct system shared use revenue	1,337,664.39€	-0.95%	3.06%
Poles for installation of aerial network cables rental revenue	106,087.94€	10.56%	89.94%
Colocation spaces rental revenue	747,933.11€	5.84%	9.79%
Total length of shared use cable duct systems (km)	34,122	40.60%	63.29%
Pipes length, 63-110 mm diameter (km)	3,609	7.05%	40.36%
Pipes length, 50 mm diameter (km)	4,366	13.89%	205.29%
Pipes length, 20-40 mm diameter (km)	6,587	0.29%	2.01%
Pipes length, 3-16 mm diameter (km)	19,561	86.35%	87.39%
Total number of rented poles for the installation of aerial network cables	8,411	18.07%	46.69%



Shared use of electronic communications infrastructure revenues (millions EUR)



Total length of shared cable ducts (km)