


Quarterly data on the electronic communications market in the Republic of Croatia for 1. 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.

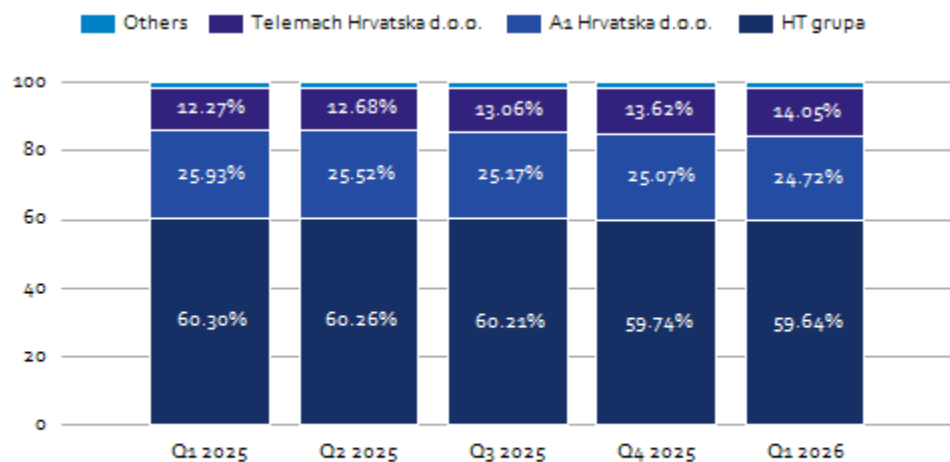


Summary overview of the market in Q1 2026

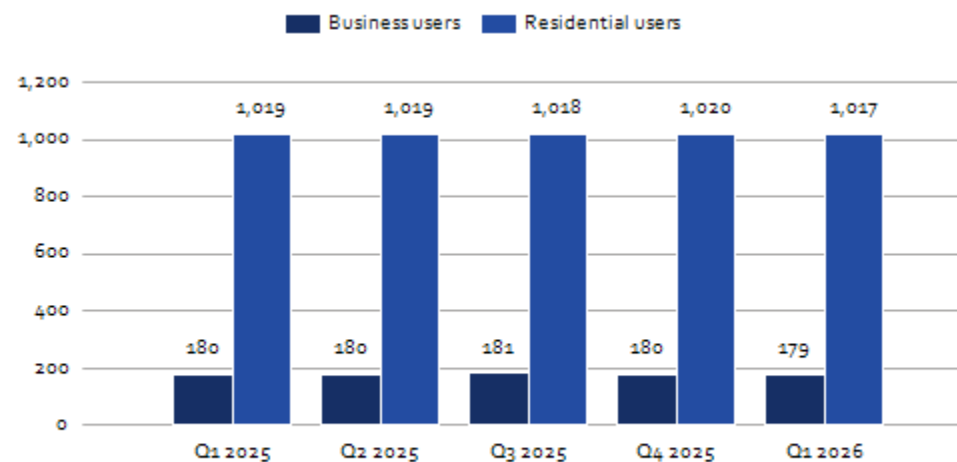
- In the first quarter of 2026, revenues from electronic communications services amounted to EUR 453 million, representing a 2.76% increase compared to the same period of the previous year. Revenues from mobile network services increased by 3.30%, while revenues from fixed network services rose by 1.68%.
- At the end of the first quarter of 2026, the strong migration of end-users to fiber networks continued. The number of fiber broadband lines increased by 113,878 on an annual basis, reaching 497,605, thereby exceeding for the first time the number of broadband lines provided over traditional copper networks. The total number of VHCN lines reached 641,996, representing 53.67% of the total 1,196,170 broadband lines. At the same time, the number of copper broadband lines decreased by 82,202 year-on-year, amounting to 466,111 lines.
- In publicly available fixed-line telephony services, the downward trend in usage continued, with annual revenues decreasing by 5.7 percent and total outgoing traffic declining by 11.8 percent. The number of users decreased by 0.8 percent, further confirming the ongoing reduction in demand for this service. In publicly available mobile telephony services, a slight increase in total revenue of 1.1 percent was recorded, while the number of users simultaneously grew by 5.1 percent. Total outgoing traffic increased by 1.7 percent, alongside a continued significant decline in the use of SMS and MMS services, by 21.8 percent and 9.4 percent respectively, indicating a further shift of users toward OTT services.
- The total number of pay-TV subscriptions in the first quarter recorded a slight increase of 1.9 percent compared to the same period last year, reaching 948,601 connections. At the same time, a decline was recorded across all technologies except the operator's own OTT service, whose subscriptions continue to grow strongly, by 57.4 percent. Total revenues from pay-TV services amounted to €38.9 million, representing a 5.8 percent year-on-year increase, despite revenue declines across all technologies except the operator's own OTT services. Revenue growth continues to be predominantly driven by the OTT service, whose revenues increased by 136.9 percent, reaching €8.6 million.



Fixed telephony services	Q1 2026	% Change Q1 2026 - Q4 2025	% Change Q1 2026 - Q1 2025
Total fixed telephony services revenue	25,940,969.35€	2,24 %	-5.69%
Retail revenue	24,679,601.00€	3.23%	-3.88%
Wholesale revenue	1,261,368.35€	-13.88%	-31.14%
Total number of fixed lines*	1,195,840	-0.32%	-0.19%
Number of subscribers	1,085,392	0.00%	-0.83%
Fixed originating voice minutes (min)**	185,825,520	-1.27%	-11.82%



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



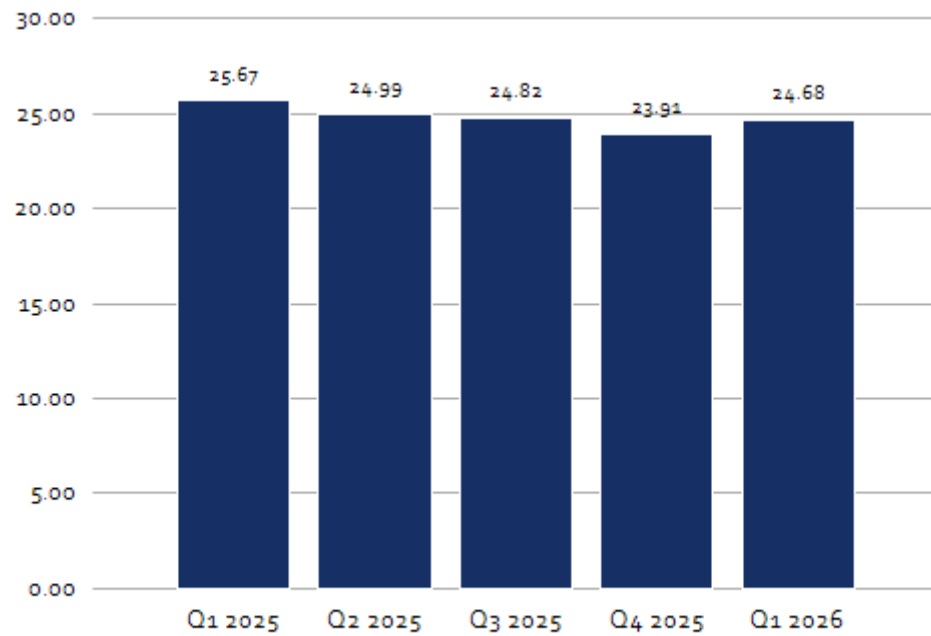
Fixed telephony lines (in thousands)

*CPS (carrier pre-selection) subscribers are included

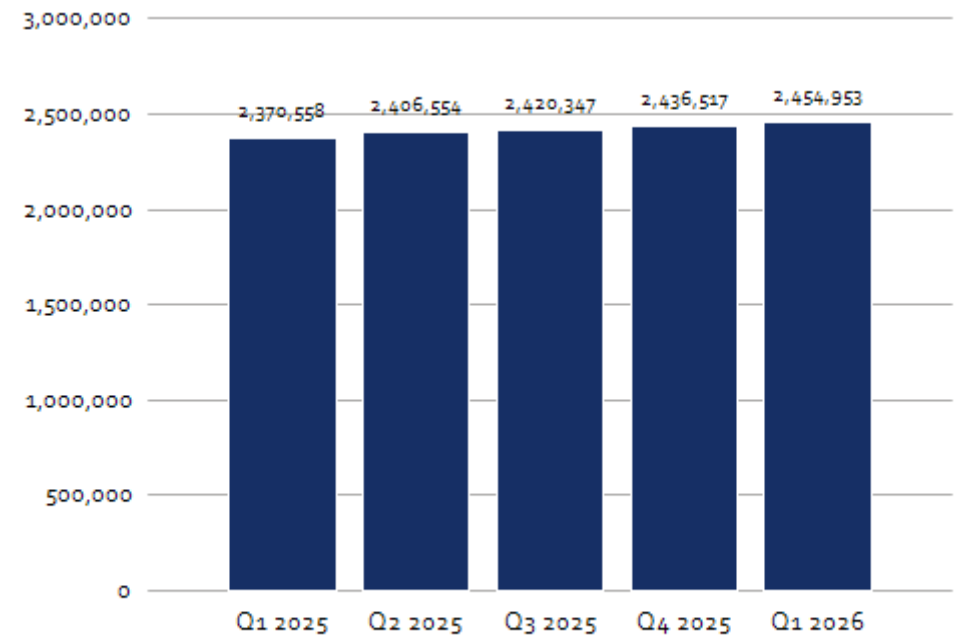
**Includes all types of calls (local, national, international calls, calls to mobile networks and calls to VAS numbers)



Fixed telephony services - bundles	Q1 2026	% Change Q1 2026 - Q4 2025	% Change Q1 2026 - Q1 2025
Stand-alone – fixed voice telephony subscribers	150,383	-5.07%	-12.07%
Number of bundled services subscribers – 2D	220,038	-12.46%	-12.77%
Number of bundled services subscribers – 3D	357,568	-6.83%	-4.23%
Number of bundled services subscribers – 4D	327,621	19.24%	24.88%



Fixed telephony service retail revenue (millions EUR)



Fixed telephony ported numbers



Mobile telephony services	Q1 2026	% Change Q1 2026 - Q4 2025	% Change Q1 2026 - Q1 2025
Total mobile telephony services revenues	143,216,629.79€	-12.91%	1.06%
Retail revenue	132,343,748.46€	-13.16%	1.58%
<u>Retail revenue - Residential</u>	97,137,208.53€	-14.61%	0.59%
<i>Prepaid subscribers</i>	19,347,939.57€	-15.85%	-1.87%
<i>Postpaid subscribers</i>	77,789,268.96€	-14.29%	1.22%
Retail revenue - Business	35,206,539.92€	-8.92%	4.42%
Wholesale revenue	10,872,881.33€	-9.69%	-4.96%
Total number of active subscribers (3G, 4G, 5G)*	4,964,698	0.08%	5.07%
Residential	4,047,646	-0.04%	5.24%
<i>Prepaid subscribers</i>	1,564,532	-1.23%	6.61%
<i>Postpaid subscribers</i>	2,483,114	0.72%	4.39%
Business	917,052	0.61%	4.30%
Mobile penetration**	128.23%	0.08%	5.07%
Mobile originating voice minutes (min)***	2,647,665,392	-0.47%	1.71%
International roaming traffic - own subscribers (min)	84,663,799	-2.51%	-19.65%
International roaming traffic - foreign subscribers (min)	56,441,291	-32.84%	-23.66%
Total SMS sent	137,330,287	-8.89%	-21.80%
Total MMS sent	1,136,503	-3.35%	-9.39%

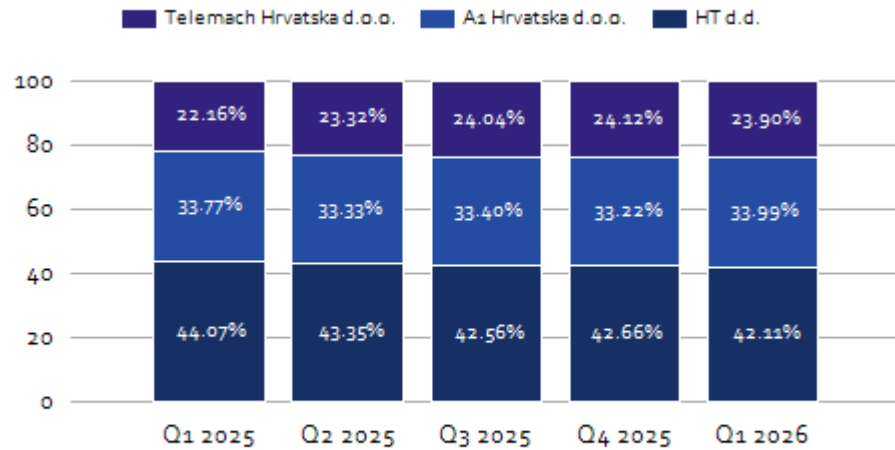
*Definition of active pre-paid subscriber: Subscriber who has used a mobile service or refilled the account in the last 90 days

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

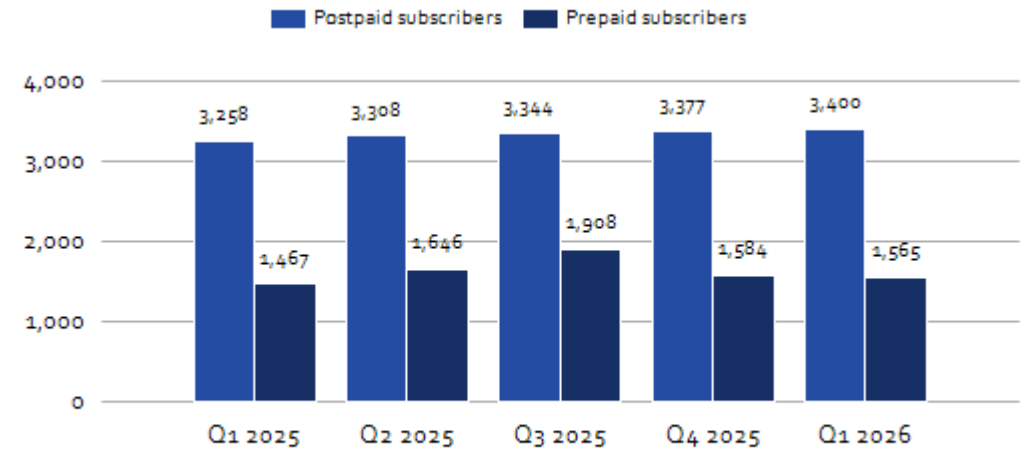
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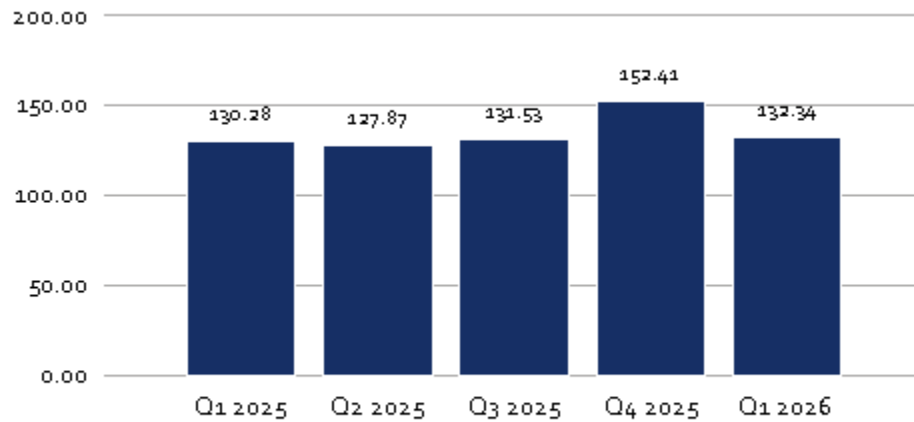
Quarterly data on the electronic communications market in the Republic of Croatia for 1. quarter 2026.



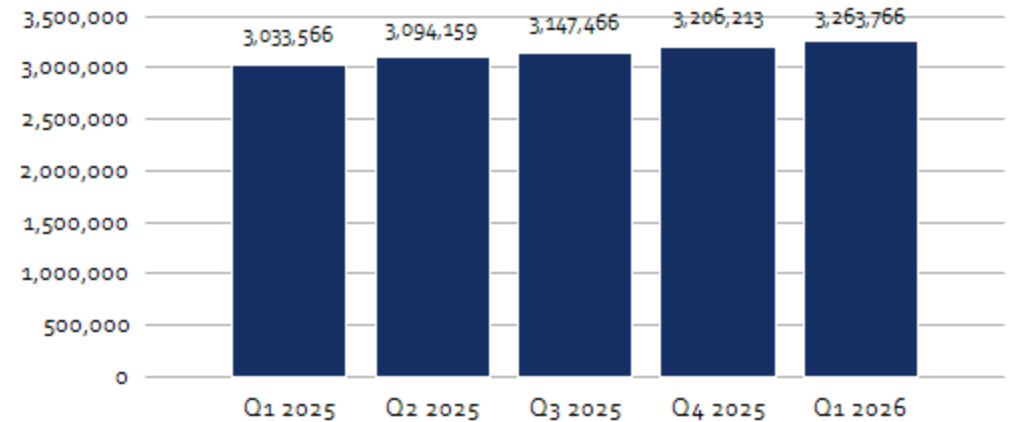
Mobile telephony operator's market shares by number of subscribers



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



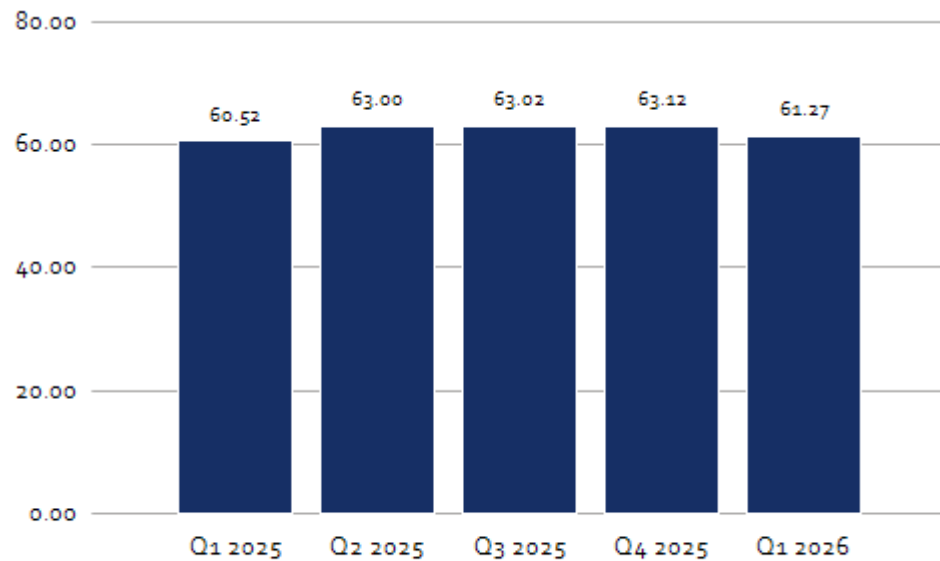
Mobile telephony service retail revenue (millions EUR)



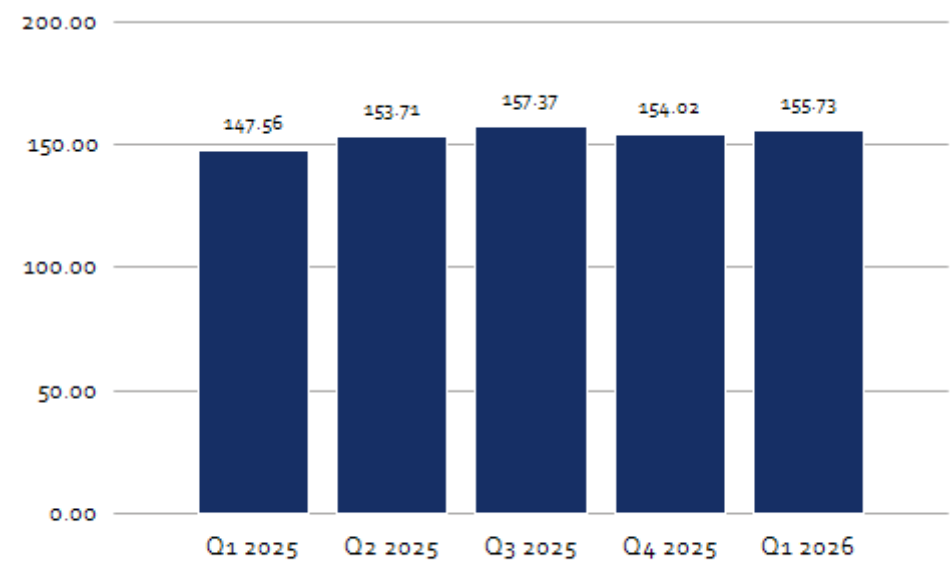
Mobile telephony ported numbers



Internet access service (retail level) - revenues and total subscriptions	Q1 2026	% Change Q1 2026 - Q4 2025	% Change Q1 2026 - Q1 2025
Total broadband Internet access services revenues	218,745,323.57€	-0.01%	4.76%
Fixed broadband Internet access service revenue	61,272,024.99€	-2.93%	1.24%
Mobile broadband Internet access service revenue	155,728,656.95€	1.11%	5.53%
Satellite access revenue	1,744,641.63€	7.52%	139.39%
Total number of broadband subscriptions (lines)	7,222,172	0.26%	4.71%



Fixed broadband Internet access service retail revenues (millions EUR)



Mobile broadband Internet access service retail revenues (millions EUR)



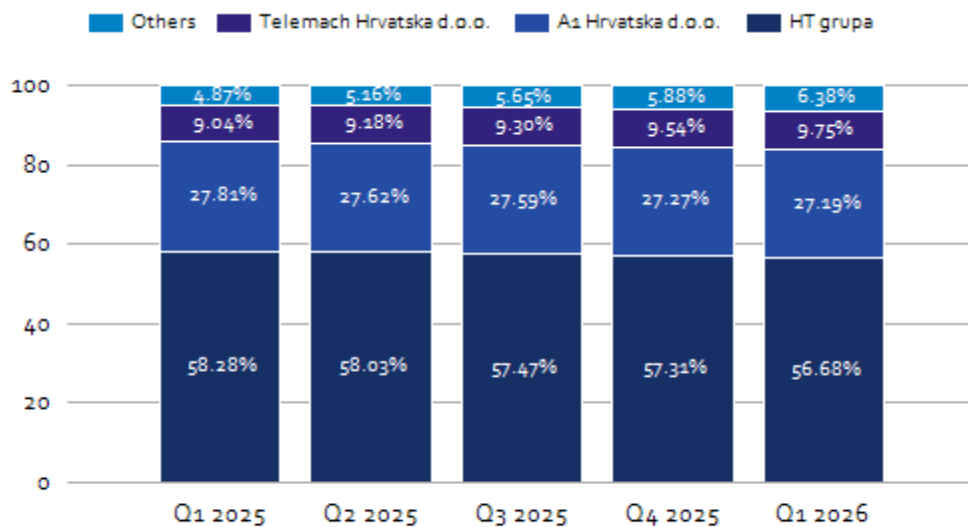
Internet access services (retail level) - fixed broadband network	Q1 2026	% Change Q1 2026 - Q4 2025	% Change Q1 2026 - Q1 2025
Fixed broadband Internet access service subscriptions (lines)*	1,196,432	0.92%	3.41%
<u>Copper access network</u>	466,115	-4.07%	-14.99%
<i>Access over own copper access network</i>	368,863	-4.33%	-15.23%
<i>xDSL based broadband using full local-loop unbundling</i>	23,358	-6.51%	-23.90%
<i>xDSL based broadband using shared access</i>	2	0.00%	0.00%
<i>Bitstream access over copper access network (xDSL)</i>	73,892	-1.93%	-10.39%
<u>Fiber optic access network</u>	497,604	5.63%	29.67%
<i>Access over own fiber access network</i>	355,516	4.19%	21.48%
<i>Fiber unbundling access</i>	69,432	7.70%	37.13%
<i>Bitstream access over fiber optic access network</i>	72,656	11.09%	79.62%
<u>Cable access network</u>	145,244	-2.03%	-9.73%
<u>Fixed wireless access (FWA)</u>	60,455	3.81%	19.05%
<u>Satellite access</u>	17,735	38.13%	289.69%
<u>High Quality Access</u>	9,279	0.71%	6.86%
<u>Fixed broadband traffic (TB)</u>	1,333,976	9.32%	32.89%

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

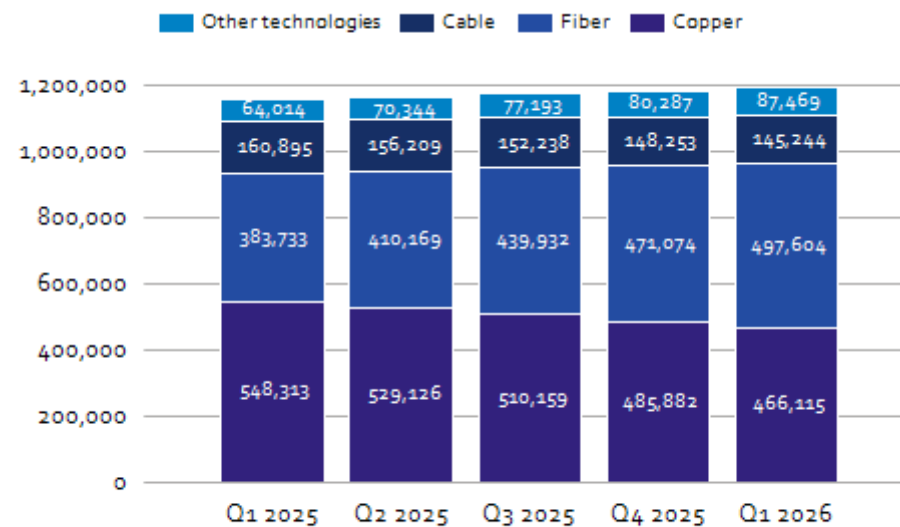
Internet access services (retail level) - bundles	Q1 2026	% Change Q1 2026 - Q4 2025	% Change Q1 2026 - Q1 2025
Number of standalone internet access service subscribers	4,736,033	-6.50%	-1.01%
Number of bundled services subscribers – 2D	433,869	-2.60%	-2.04%
Number of bundled services subscribers – 3D	423,650	-4.76%	-2.24%
Number of bundled services subscribers – 4D	327,621	19.24%	24.88%



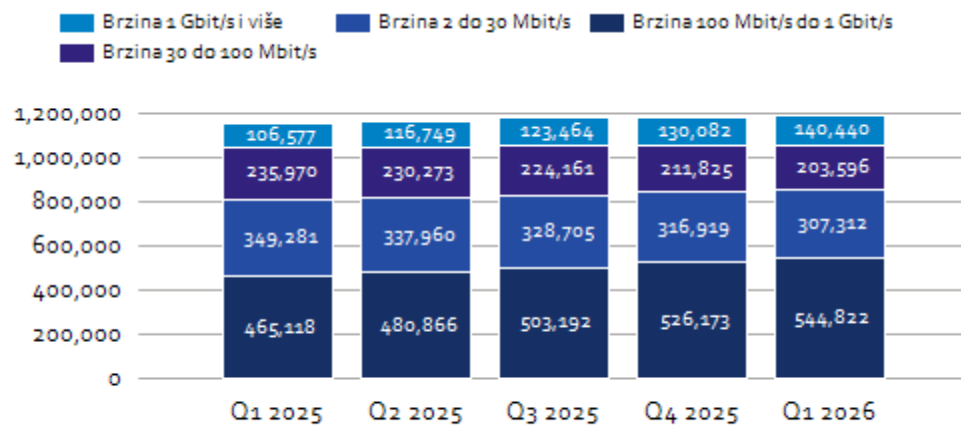
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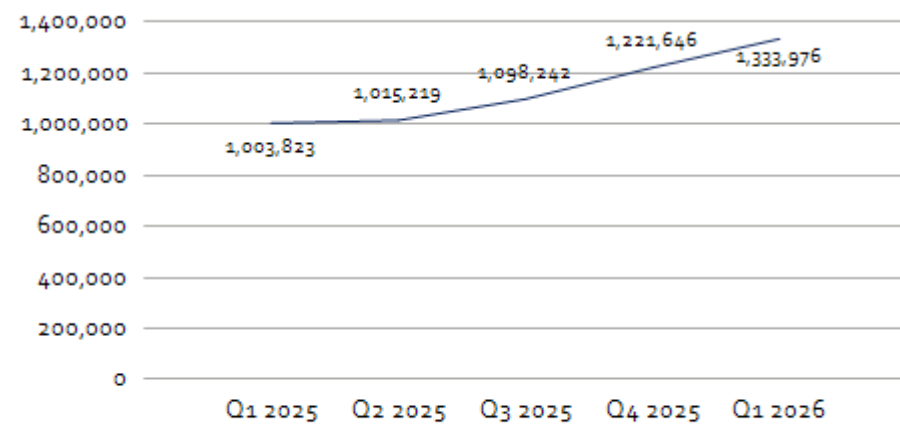
Fixed broadband Internet access service operator's market shares by number of lines



Fixed broadband Internet access service by technologies



Fixed broadband Internet access service by download speeds



Total fixed broadband data traffic (TB)

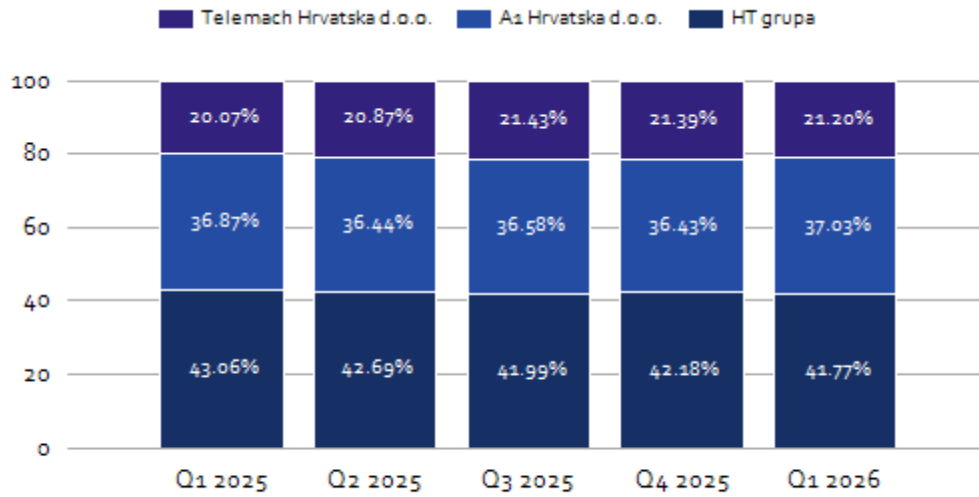


Internet access services (retail level) - mobile broadband network	Q1 2026	% Change Q1 2026 - Q4 2025	% Change Q1 2026 - Q1 2025
Mobile broadband Internet access service subscriptions (3G, 4G, 5G etc)*	6,025,740	0.13%	4.98%
<u>Residential (3G and 4G)</u>	2,352,730	-20.02%	-20.73%
<i>Dedicated data subscriptions (cards/modems/keys etc.)</i>	94,943	-1.66%	-34.22%
<i>Mobile phones*</i>	2,116,733	-21.67%	-20.57%
<i>M2M</i>	7	0.00%	40.00%
<i>Broadband access at fixed location via mobile network</i>	141,047	-1.22%	-11.02%
<u>Residential (5G)</u>	2,083,212	39.24%	62.35%
<i>Dedicated data subscriptions (cards/modems/keys etc.)</i>	90,169	3.03%	47.56%
<i>Mobile phones</i>	1,931,796	43.33%	63.45%
<i>M2M</i>	0	N/A	N/A
<i>Broadband access at fixed location via mobile network</i>	61,247	0.72%	52.36%
<u>Business (3G and 4G)</u>	941,406	-11.92%	-14.33%
<i>Dedicated data subscriptions (cards/modems/keys etc.)</i>	113,722	-6.90%	-11.19%
<i>Mobile phones</i>	430,185	-18.52%	-25.03%
<i>M2M</i>	356,681	-5.49%	1.07%
<i>Broadband access at fixed location via mobile network</i>	40,818	-0.96%	-7.34%
<u>Business (5G)</u>	648,392	26.74%	66.14%
<i>Dedicated data subscriptions (cards/modems/keys etc.)</i>	52,019	28.56%	93.60%
<i>Mobile phones</i>	486,853	27.01%	59.43%
<i>M2M</i>	105,006	26.46%	92.22%
<i>Broadband access at fixed location via mobile network</i>	4,514	-5.05%	32.76%
<u>Mobile broadband traffic (TB)</u>	469,805	8.35%	29.93%

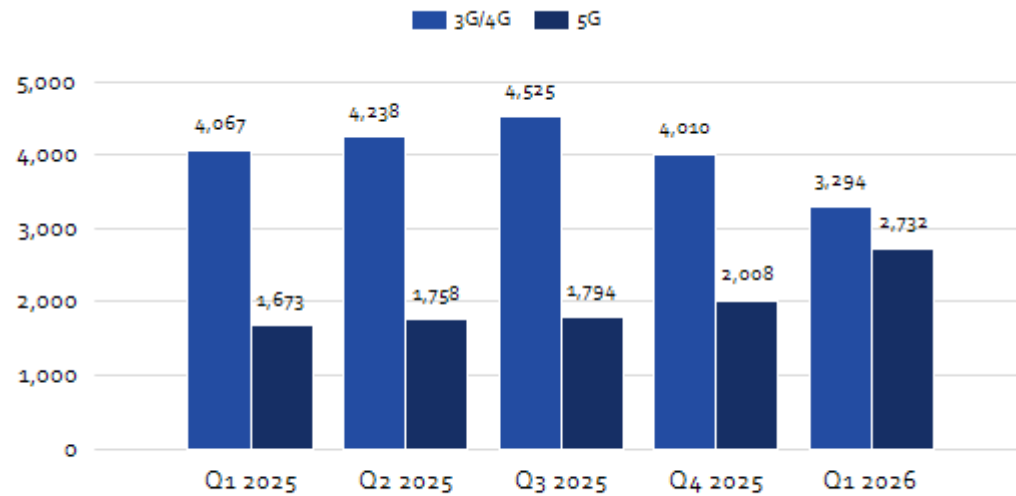
*Number of subscribers which have made an internet mobile connection in the last go days through mobile phones



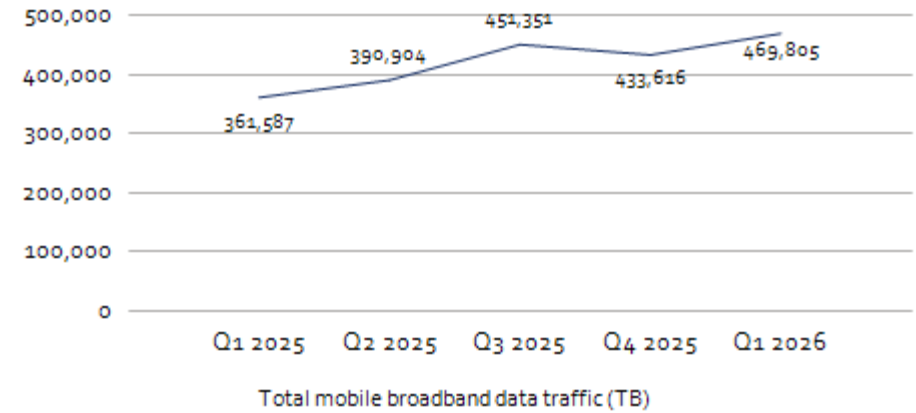
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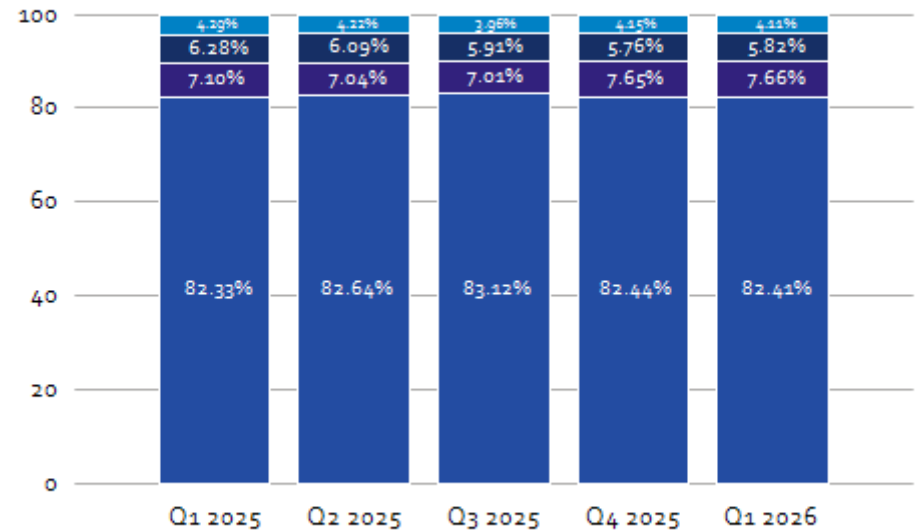
Mobile broadband Internet access service operator's market shares by number of subscriptions



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



Total mobile broadband data traffic (TB)



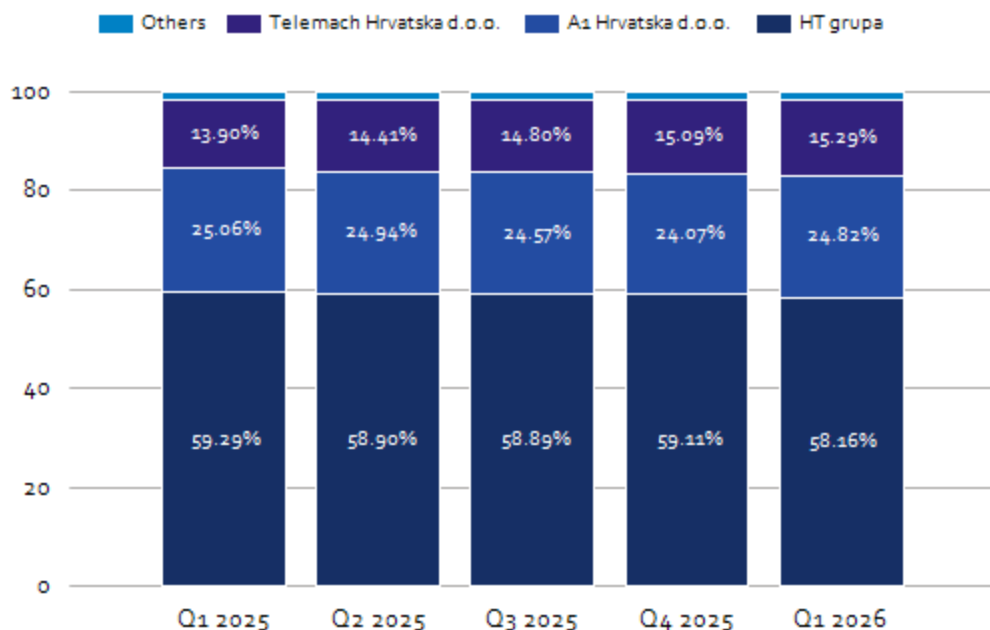
Mobile broadband Internet access service subscriptions by type of access



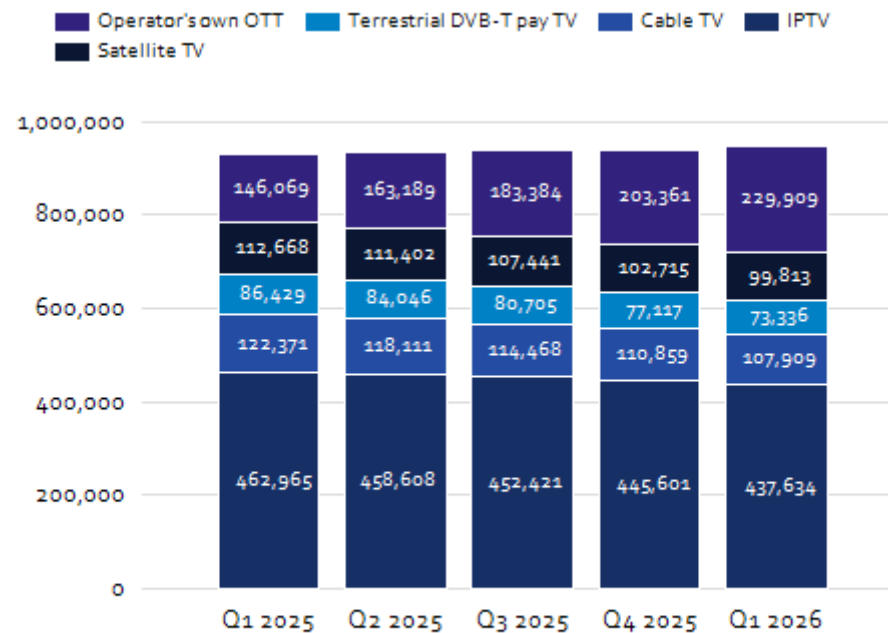
Television services	Q1 2026	% Change Q1 2026 - Q4 2025	% Change Q1 2026 - Q1 2025
Television services revenues	38,874,997.56€	-2.11%	5.79%
Cable TV revenue	5,283,750.70€	-4.30%	0.59%
IPTV revenue	18,413,940.22€	-4.98%	-11.82%
Satellite TV revenue	3,705,487.35€	-3.89%	-3.59%
Digital terrestrial TV revenue	2,896,799.56€	-4.93%	-8.08%
Own OTT service revenue	8,575,019.73€	8.40%	136.90%
Total number of pay-TV subscriptions (lines)	948,601	0.95%	1.95%
Cable reception	107,909	-2.66%	-11.82%
<i>Residential</i>	104,975	-2.68%	-11.86%
<i>Business</i>	2,934	-1.87%	-10.19%
IPTV	437,634	-1.79%	-5.47%
<i>Residential</i>	410,581	-1.92%	-5.83%
<i>Business</i>	27,053	0.30%	0.34%
Satellite reception (SAT TV)	99,813	-2.83%	-11.41%
<i>Residential</i>	91,847	-3.17%	-11.75%
<i>Business</i>	7,966	1.27%	-7.32%
Digital terrestrial reception – pay TV	73,336	-4.90%	-15.15%
<i>Residential</i>	72,485	-4.93%	-15.19%
<i>Business</i>	851	-2.96%	-11.08%
Own OTT service	229,909	13.05%	57.40%
<i>Residential</i>	216,267	13.69%	59.28%
<i>Business</i>	13,642	3.88%	32.51%



Quarterly data on the electronic communications market in the Republic of Croatia for 1. quarter 2026.



Pay TV operator's market shares by number of subscriptions

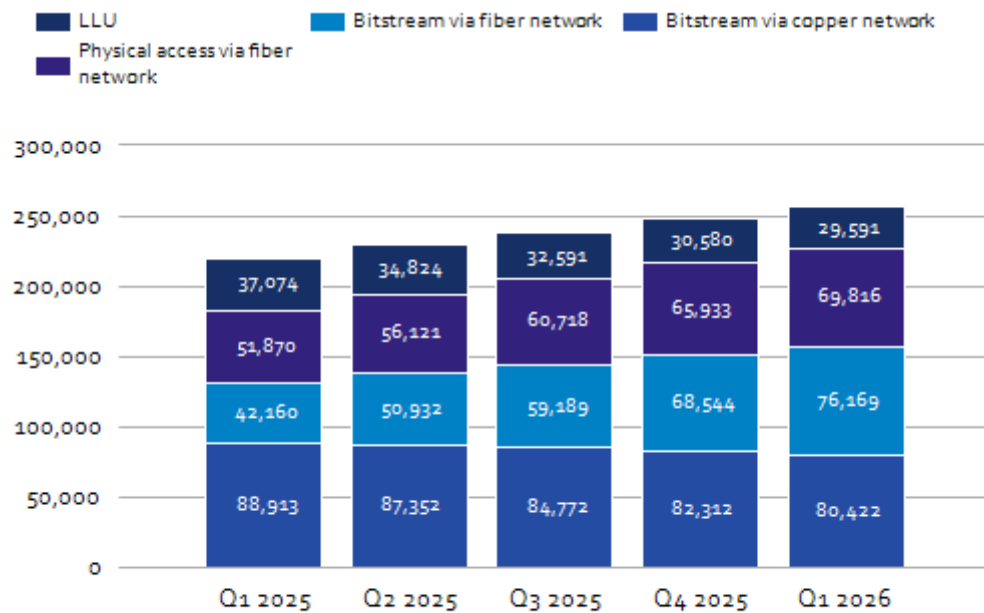


Pay TV subscriptions by technologies

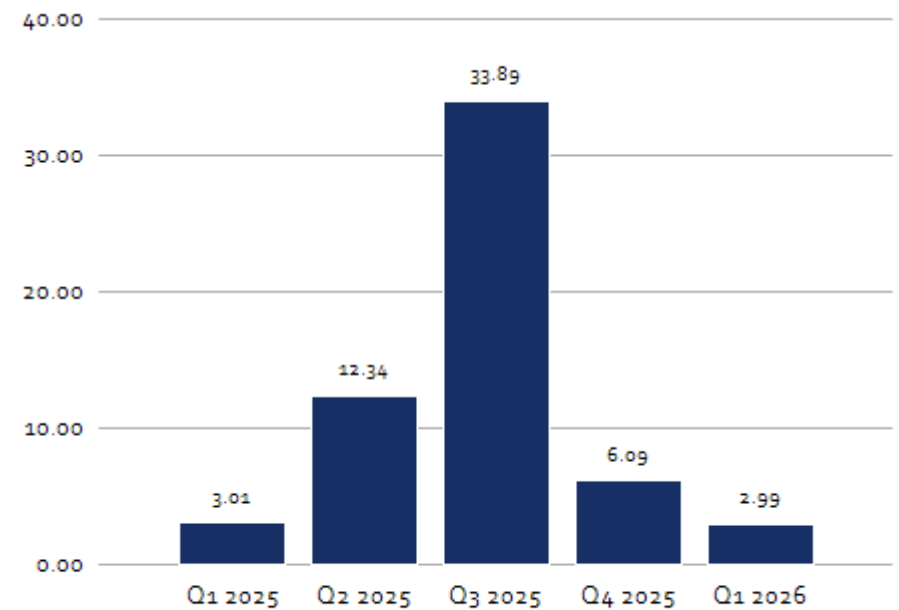
Television services - bundles	Q1 2026	% Change Q1 2026 - Q4 2025	% Change Q1 2026 - Q1 2025
Broj korisnika samostalne usluge naplatne televizije	214,451	-12.95%	-15.72%
Broj korisnika 2D paketa s uslugom naplatne televizije	111,165	23.56%	17.79%
Broj korisnika 3D paketa s uslugom naplatne televizije	280,371	-14.12%	-11.43%
Broj korisnika 4D paketa s uslugom naplatne televizije	327,621	19.24%	24.88%



Wholesale broadband access	Q1 2026	% Change Q1 2026 - Q4 2025	% Change Q1 2026 - Q1 2025
Wholesale broadband access services via copper network revenues	2,726,734.46€	-3.30%	-11.99%
Wholesale broadband access services via fiber network revenues	4,390,614.48€	5.29%	52.59%
Data roaming revenues	2,993,892.63€	-50.83%	-0.58%
Physical wholesale access via copper network (LLU)-number of lines	29,591	-3.23%	-20.18%
Bitstream wholesale access via copper network-number of lines	80,422	-2.30%	-9.55%
Physical wholesale access via fiber network (unbundled fiber at distribution node) -number of lines	69,816	5.89%	34.60%
Bitstream wholesale access via fiber networks - number of lines	76,169	11.12%	80.67%



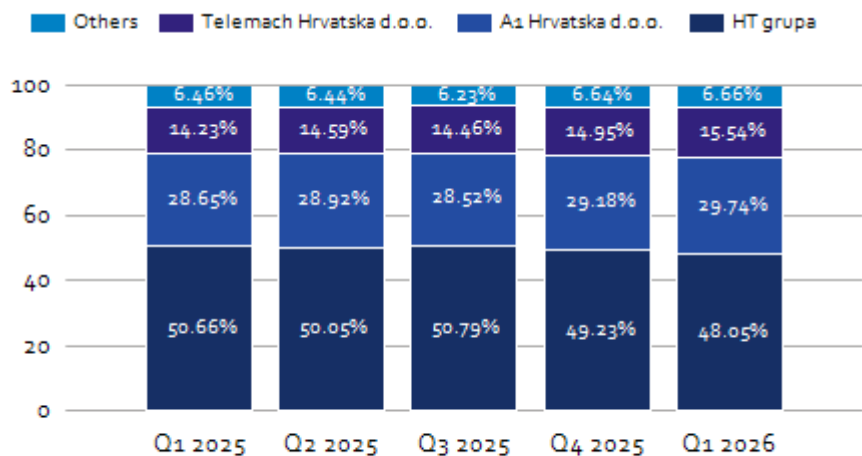
Wholesale broadband access by type of service



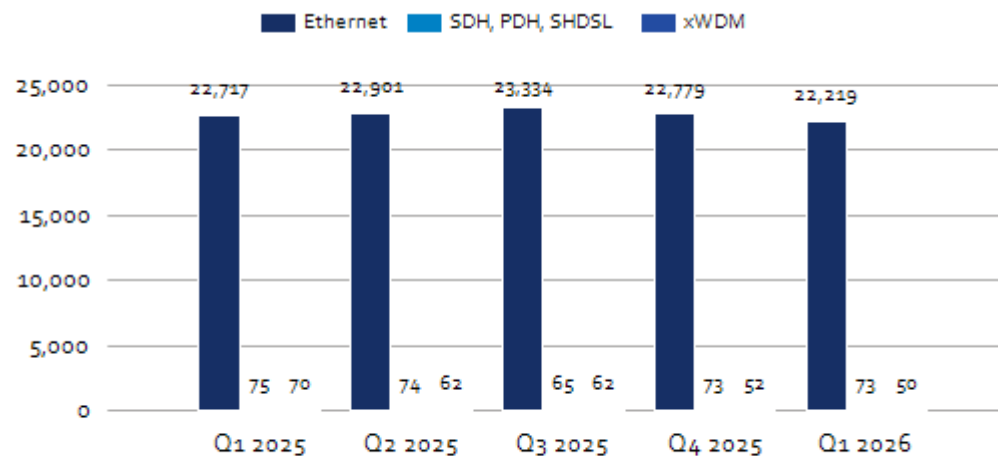
Data roaming revenues (millions EUR)



Dedicated capacity services (high-quality access) - retail level*	Q1 2026	% Change Q1 2026 - Q4 2025	% Change Q1 2026 - Q1 2025
Traditional digital lines (SDH, PDH, (S)HDSL revenue	106,630.58€	11.17%	8.24%
Ethernet technology services revenue	7,905,762.68€	0.46%	1.70%
xWDM technology services revenue	404,335.74€	-1.22%	3.71%
"Dark fiber" services revenue	498,891.09€	11.78%	9.03%
Total number of connection points of traditional digital lines (SDH, PDH, (S)HDSL)	73	0.00%	-2.67%
Total number of Ethernet technology connection points	22,219	-2.46%	-2.19%
Total number of xWDM technology connection points	50	-3.85%	-28.57%
Total length of fiber as a part of "dark fiber" service (km)	3,557	-29.31%	-29.02%



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

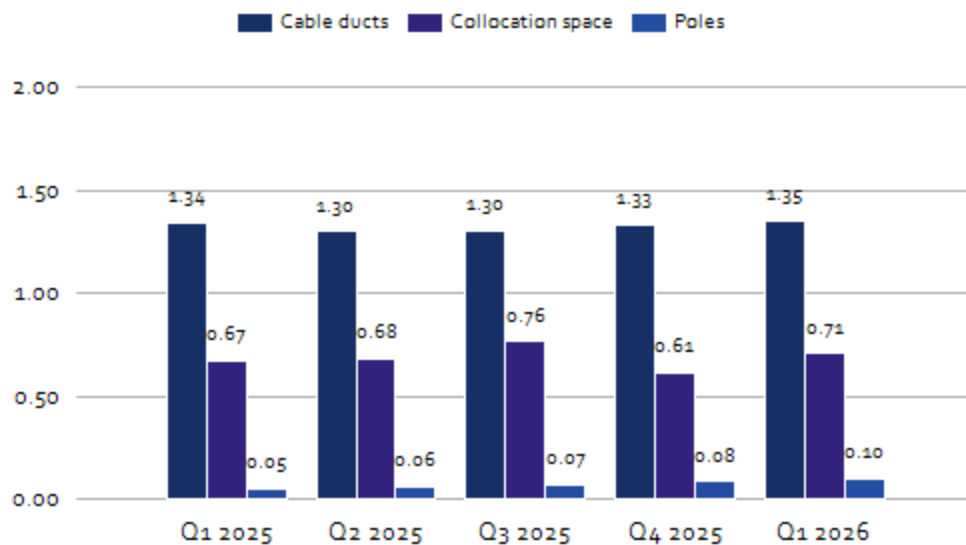


Dedicated capacity market connection points by technologies*

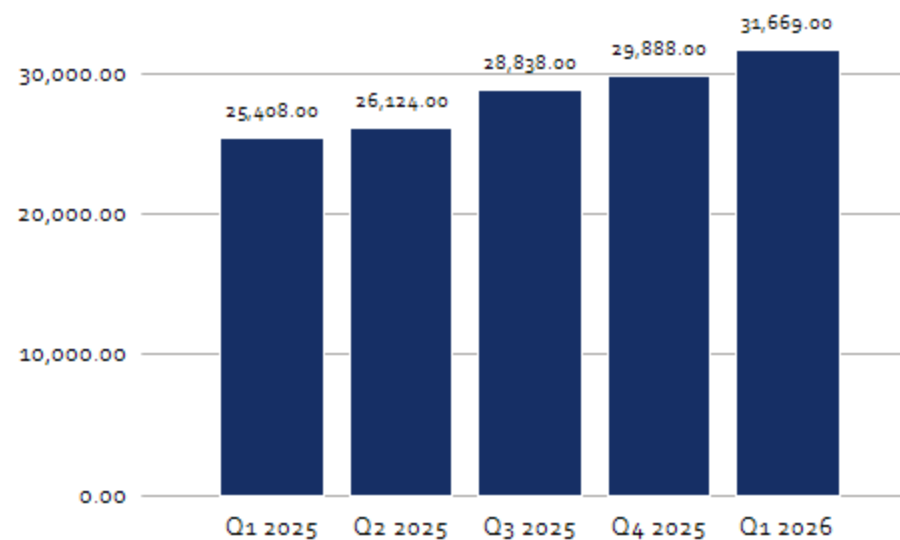
*From Q3 2024, the report no longer includes data from the operator HEP Telekomunikacije d.o.o., which provides services exclusively to companies within the HEP Group.



Shared use of electronic communications infrastructure	Q1 2026	% Change Q1 2026 - Q4 2025	% Change Q1 2026 - Q1 2025
Cable duct system shared use revenue	1,350,442.72€	1.59%	0.61%
Poles for installation of aerial network cables rental revenue	95,955.97€	14.03%	94.77%
Colocation spaces rental revenue	706,676.36€	15.82%	5.14%
Total length of shared use cable duct systems (km)	31,669	5.96%	24.64%
Pipes length, 63-110 mm diameter (km)	8,179	N/A	30.51%
Pipes length, 50 mm diameter (km)	4,421	26.28%	372.83%
Pipes length, 20-40 mm diameter (km)	7,163	1.62%	7.71%
Pipes length, 3-16 mm diameter (km)	11,906	2.31%	3.03%
Total number of rented poles for the installation of aerial network cables	7,124	9.97%	31.27%



Shared use of electronic communications infrastructure revenues (millions EUR)



Total length of shared cable ducts (km)