

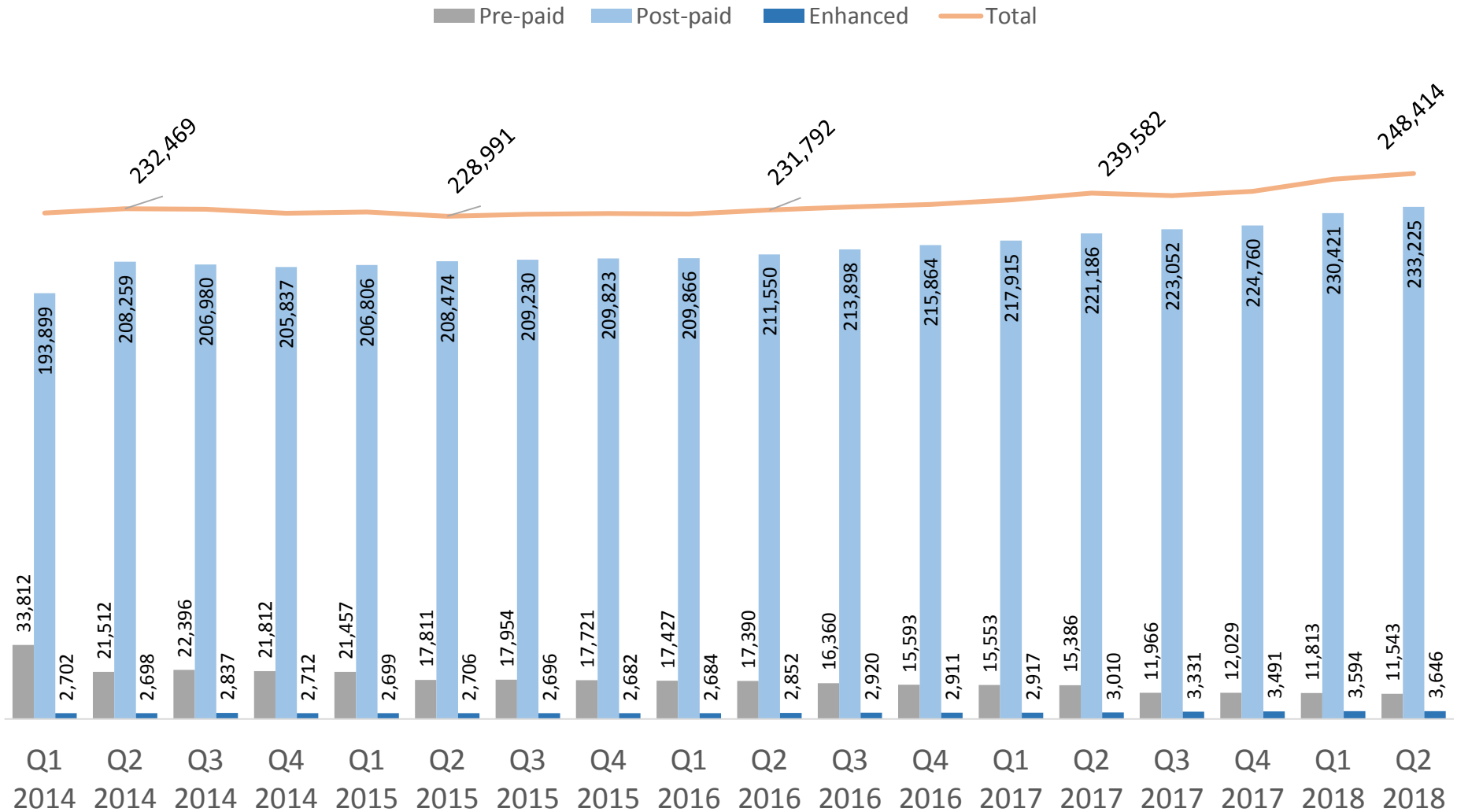


MCA Market Trends - Q1 2014 to Q2 2018

Figures based on the Data Report Sheet (DRS) publication of the 3rd October 2018

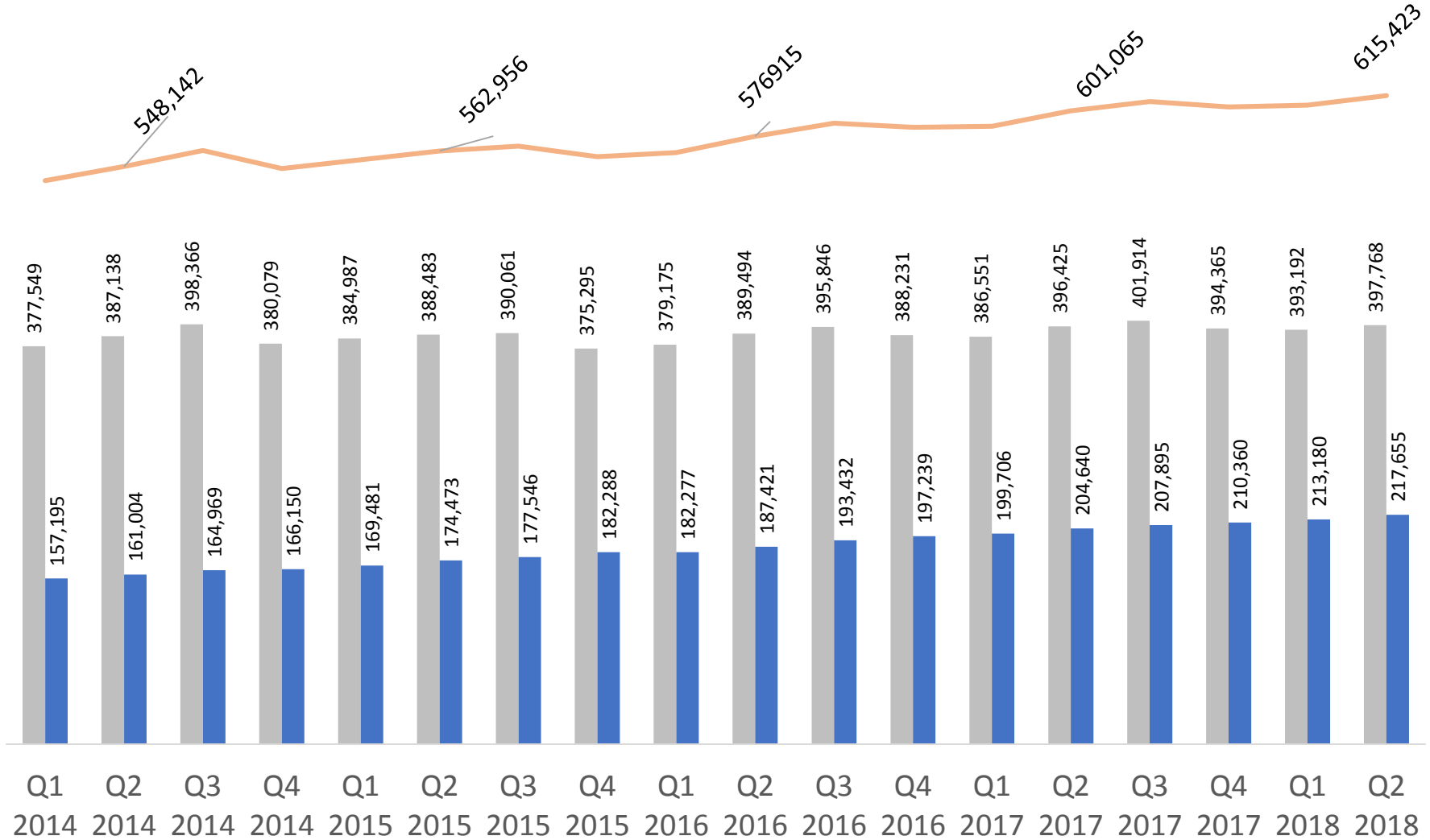
- Figures in this presentation are based on the Data Report Sheet (DRS) published on the 3rd October 2018.
- Main indicators:
 - ✓ Number of subscriptions and ARPU for:
 - (i) fixed telephony; (ii) mobile telephony (iii) fixed broadband (iv) pay-TV.
 - ✓ Mobile data volumes consumed by mobile telephony subscribers.
 - ✓ Mail volumes for the postal sector.
- Data freeze took place on the 17th September 2018

Fixed telephony – subscriptions as at end of period



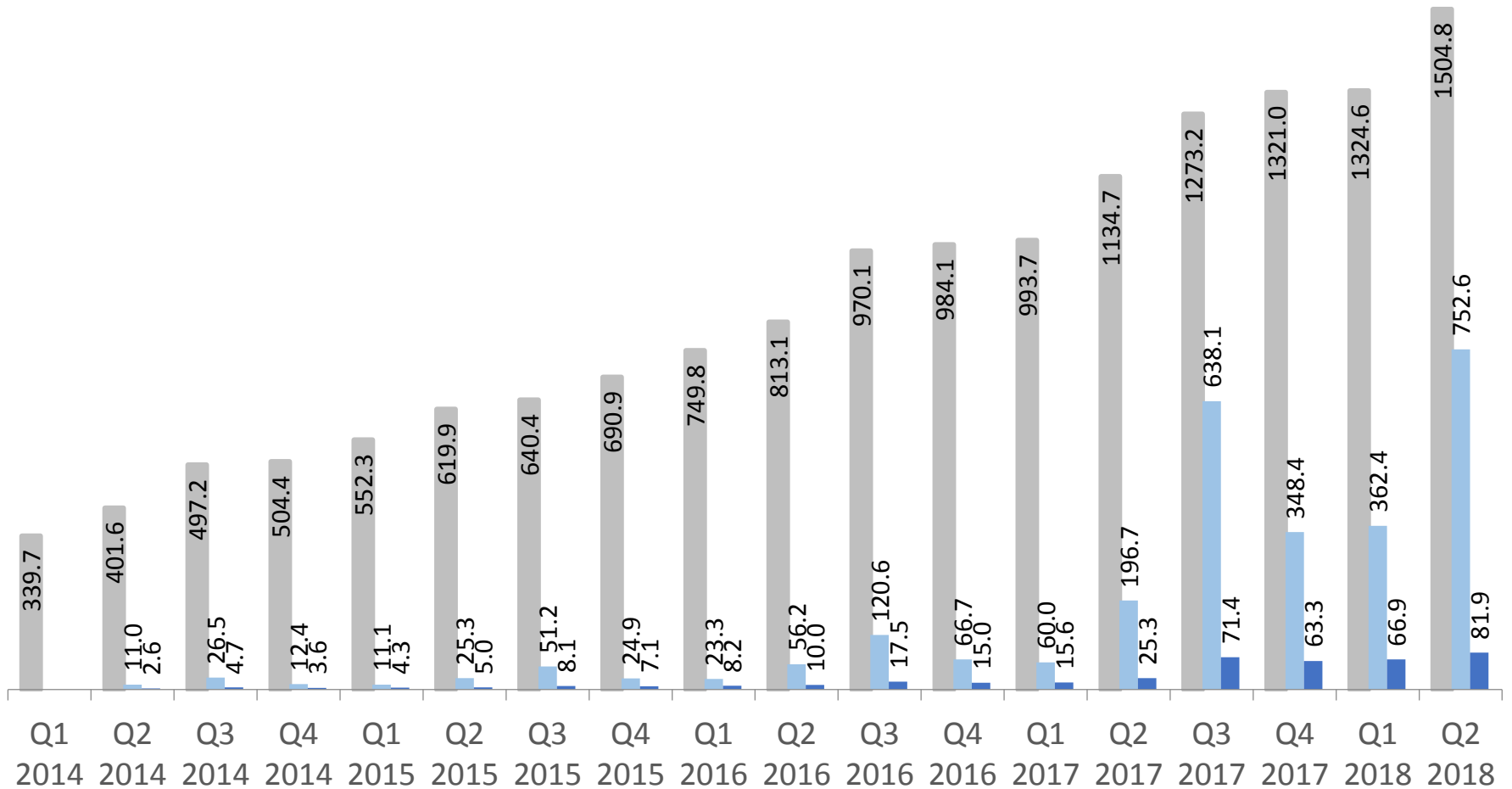
Mobile telephony – subscriptions as at end of period

Pre-paid Post-paid Total

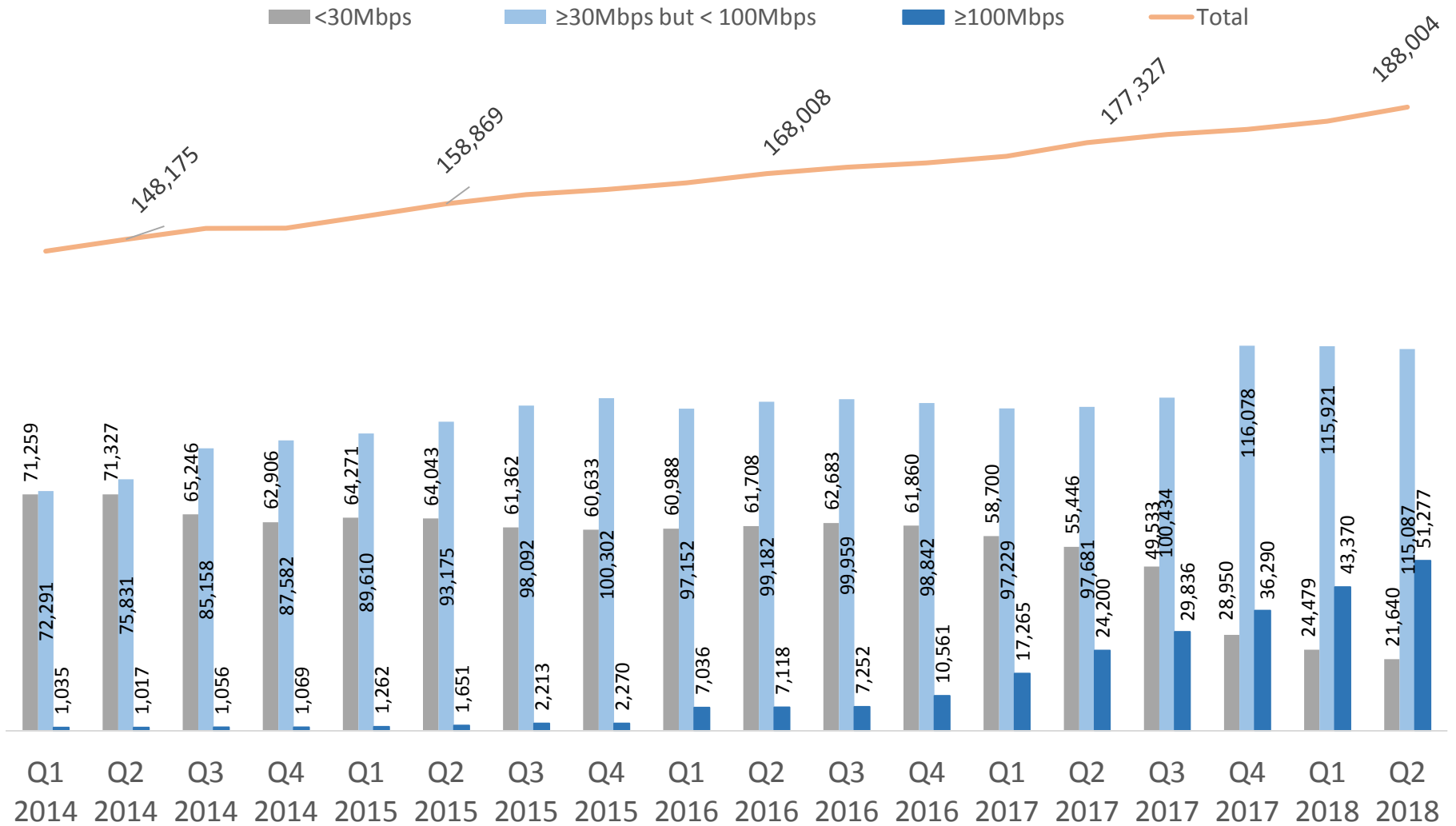


Mobile telephony – mobile data volumes (in million MBs)

■ Domestic ■ Inbound roaming ■ Outbound roaming

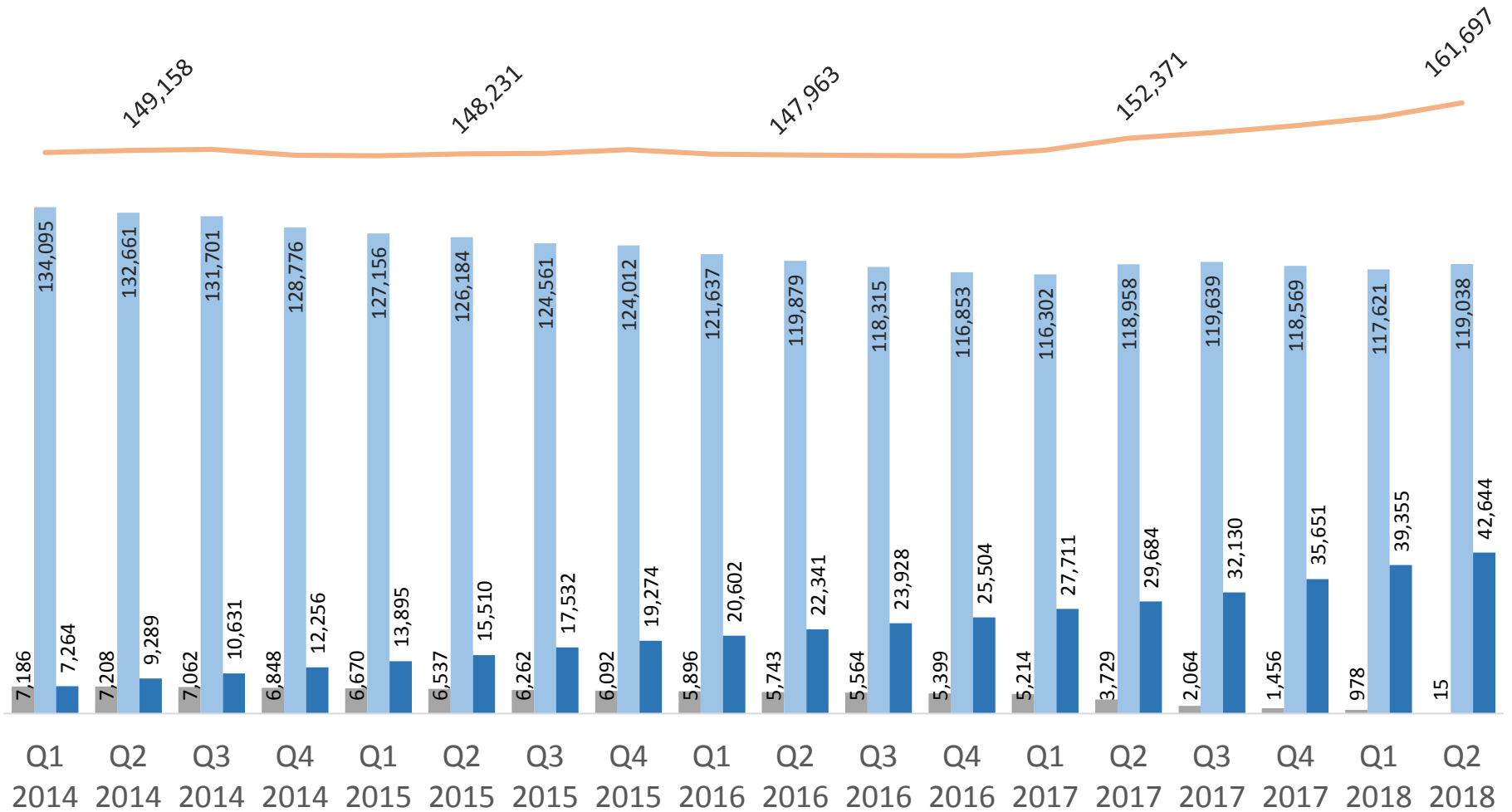


Fixed broadband – subscriptions as at end of period



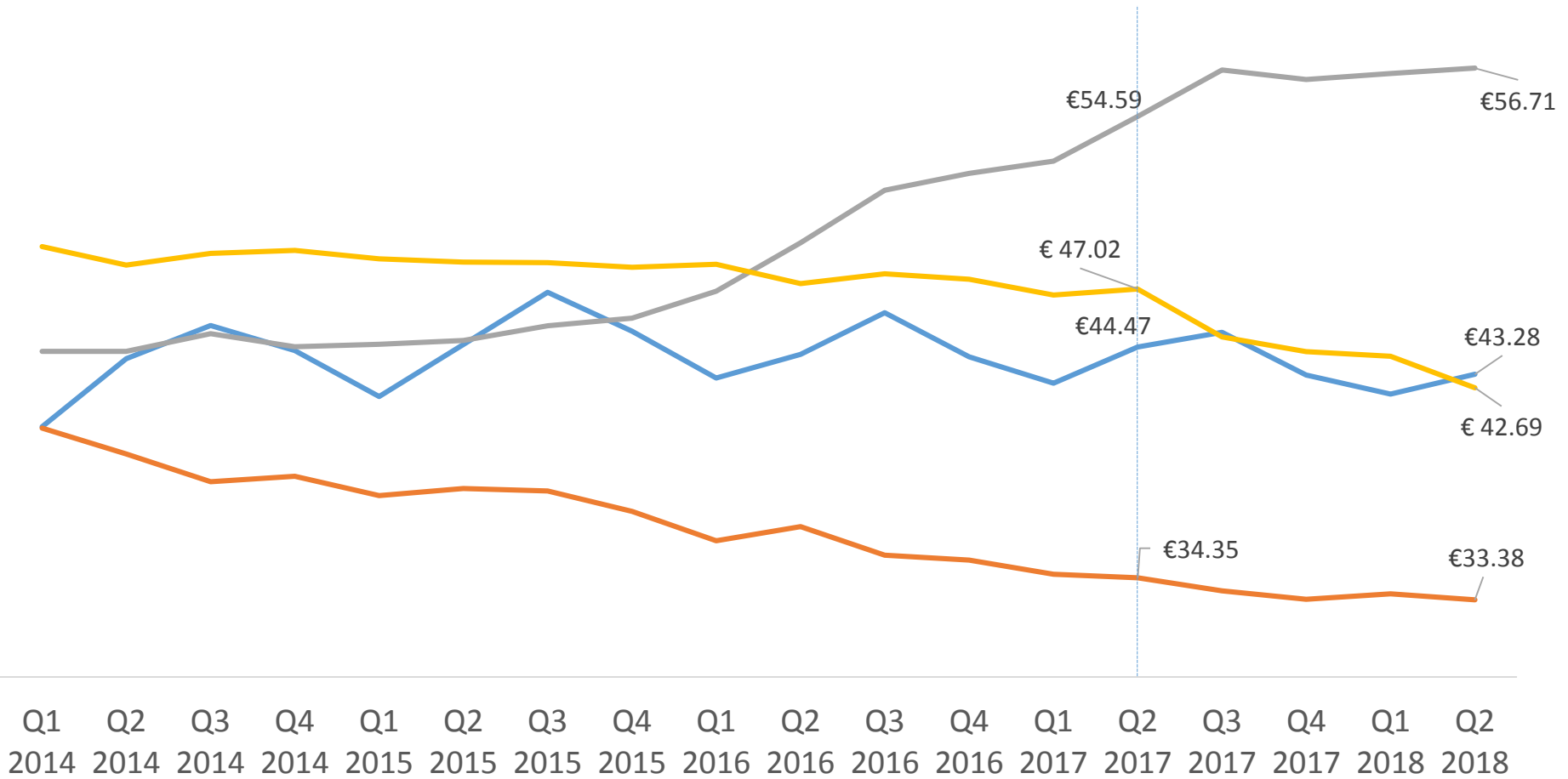
Pay-TV – subscriptions as at end of period

■ Analogue ■ Digital ■ IPTV — Total subscriptions

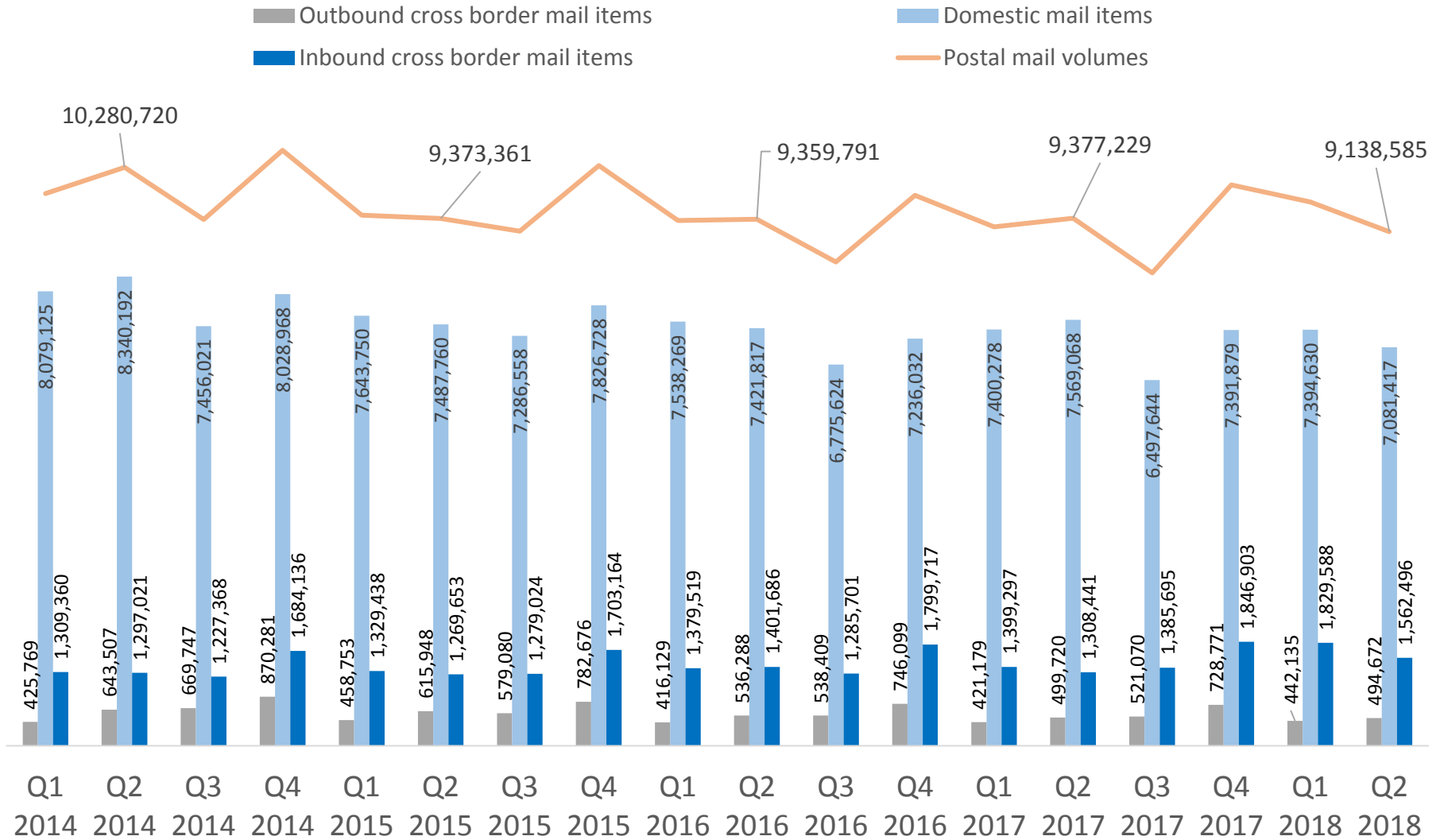


Average revenue per user (ARPU, €)

— Mobile telephony — Fixed line telephony — Fixed broadband — Pay TV



Postal – mail volumes



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