



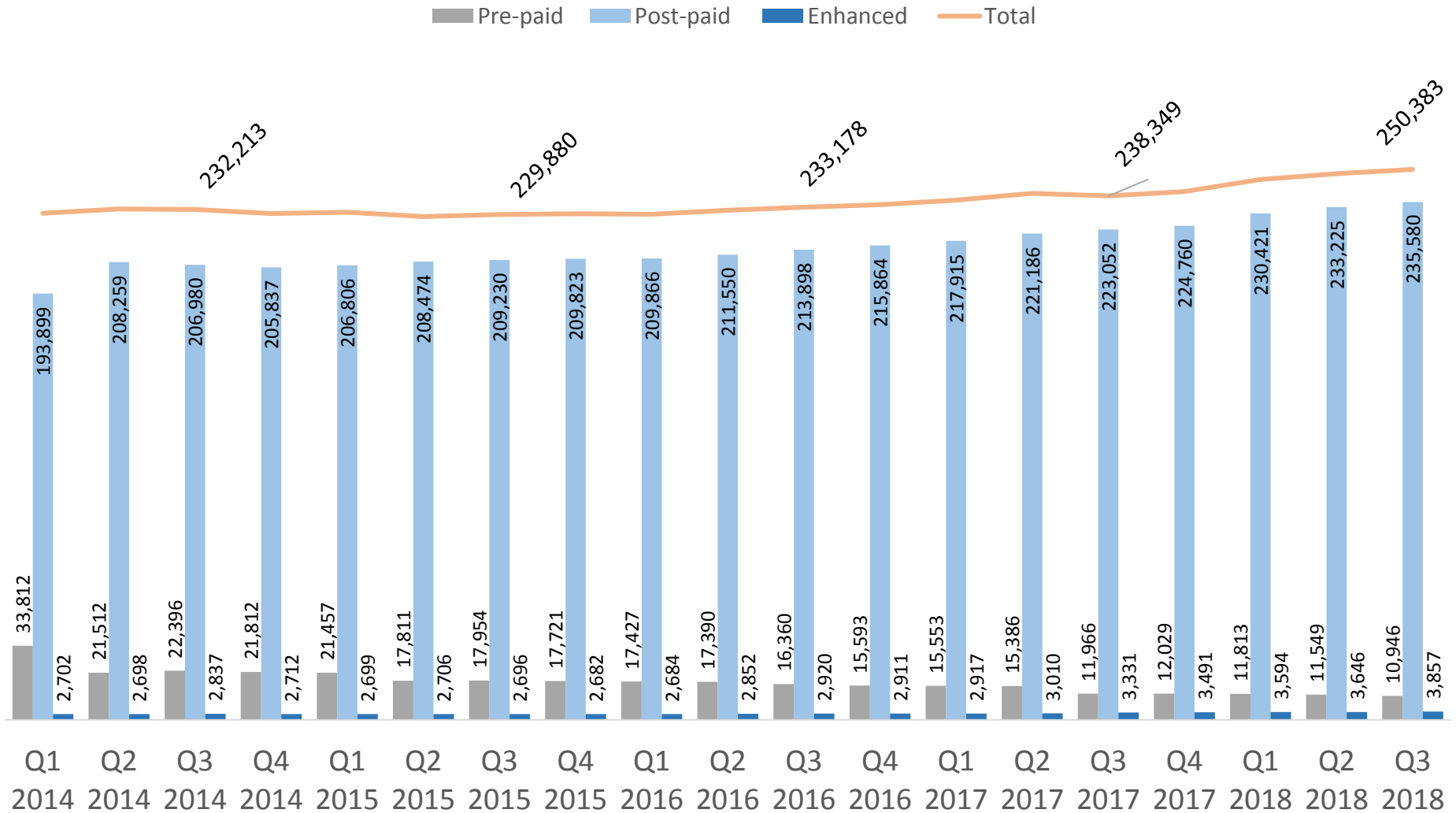
## MCA Market Trends - Q1 2014 to Q3 2018

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*Figures based on the Data Report Sheet (DRS) publication of the 5<sup>th</sup> December 2018*

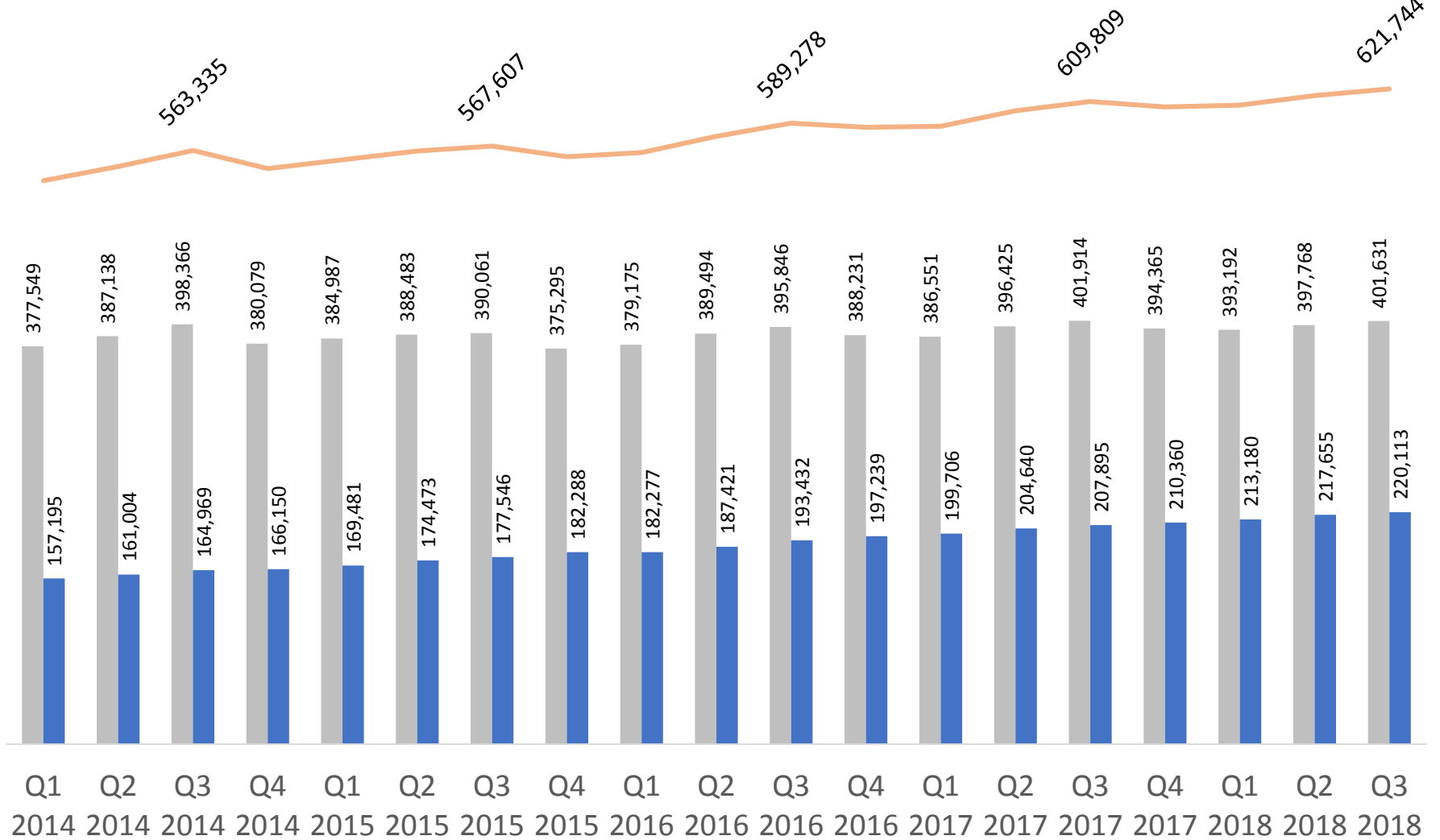
- Figures in this presentation are based on the Data Report Sheet (DRS) published on the 5<sup>th</sup> December 2018.
- Main indicators:
  - ✓ Number of subscriptions and ARPU for:
    - (i) fixed telephony; (ii) mobile telephony (iii) fixed broadband (iv) pay-TV.
  - ✓ Mobile data volumes consumed by mobile telephony subscribers.
  - ✓ Mail volumes for the postal sector.
- Data freeze took place on the 3<sup>rd</sup> December 2018

## Fixed telephony – subscriptions as at end of period



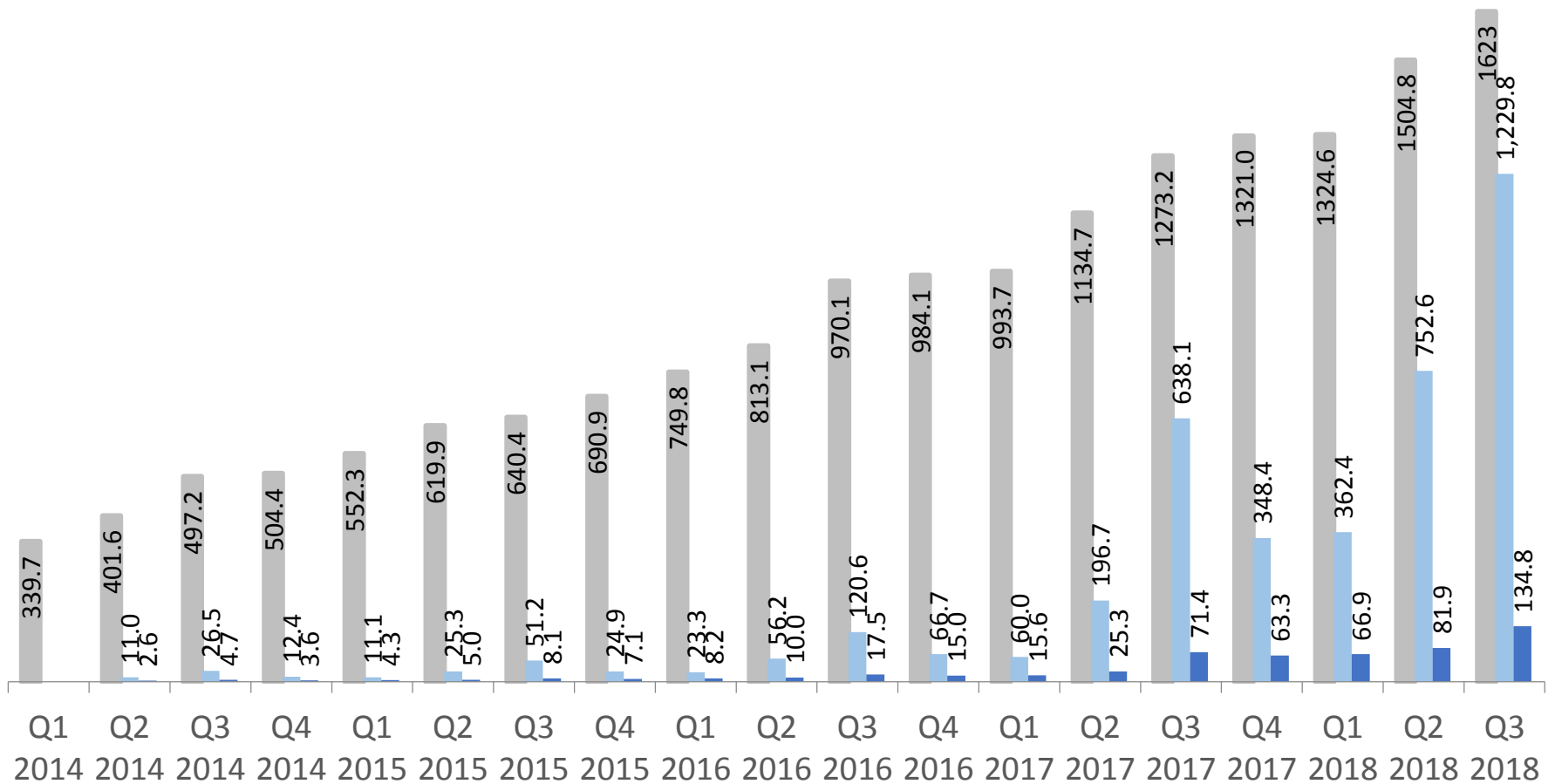
## Mobile telephony – subscriptions as at end of period

Pre-paid Post-paid Total

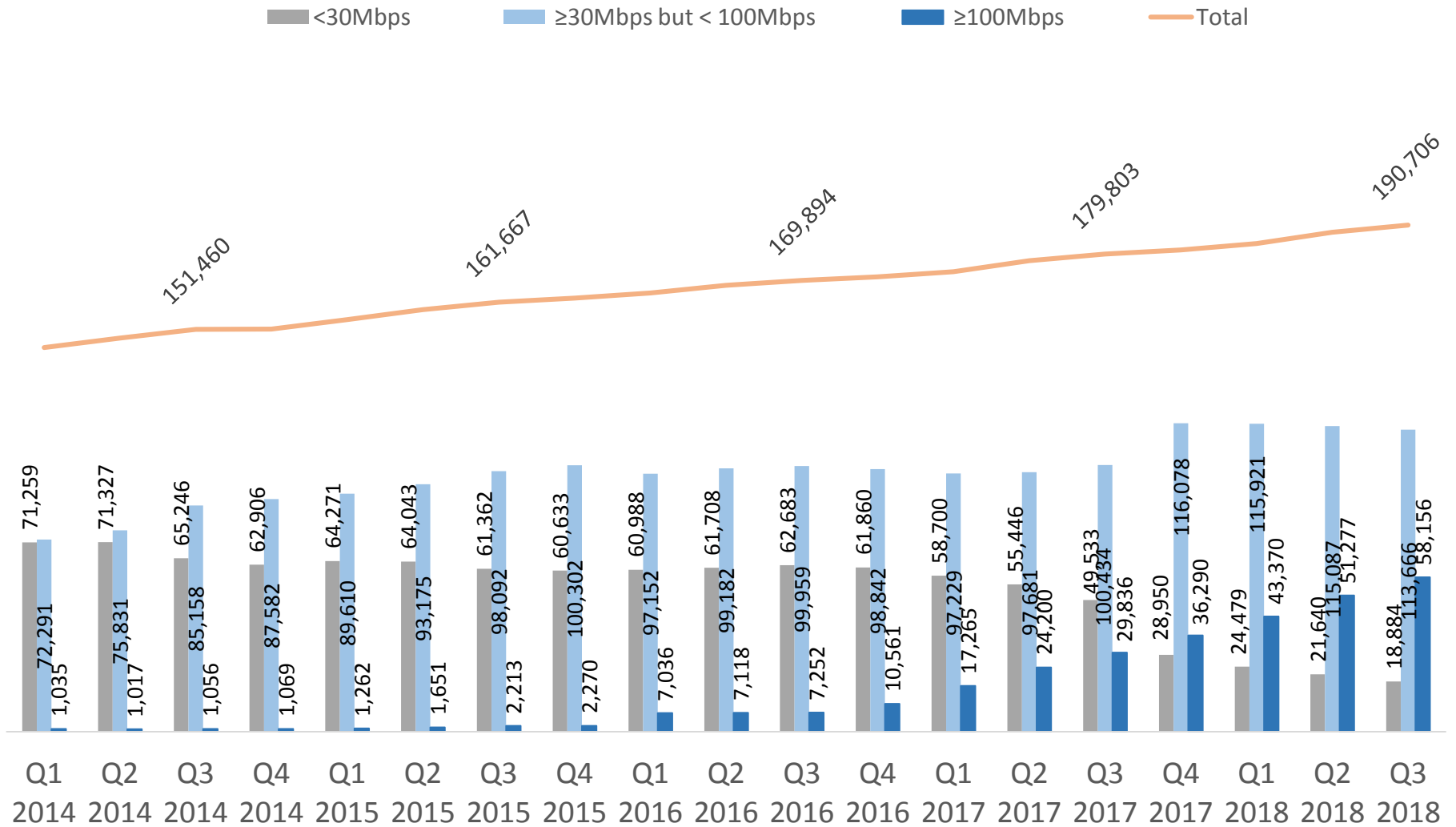


## Mobile telephony – mobile data volumes (in million MBs)

■ Domestic   ■ Inbound roaming   ■ Outbound roaming

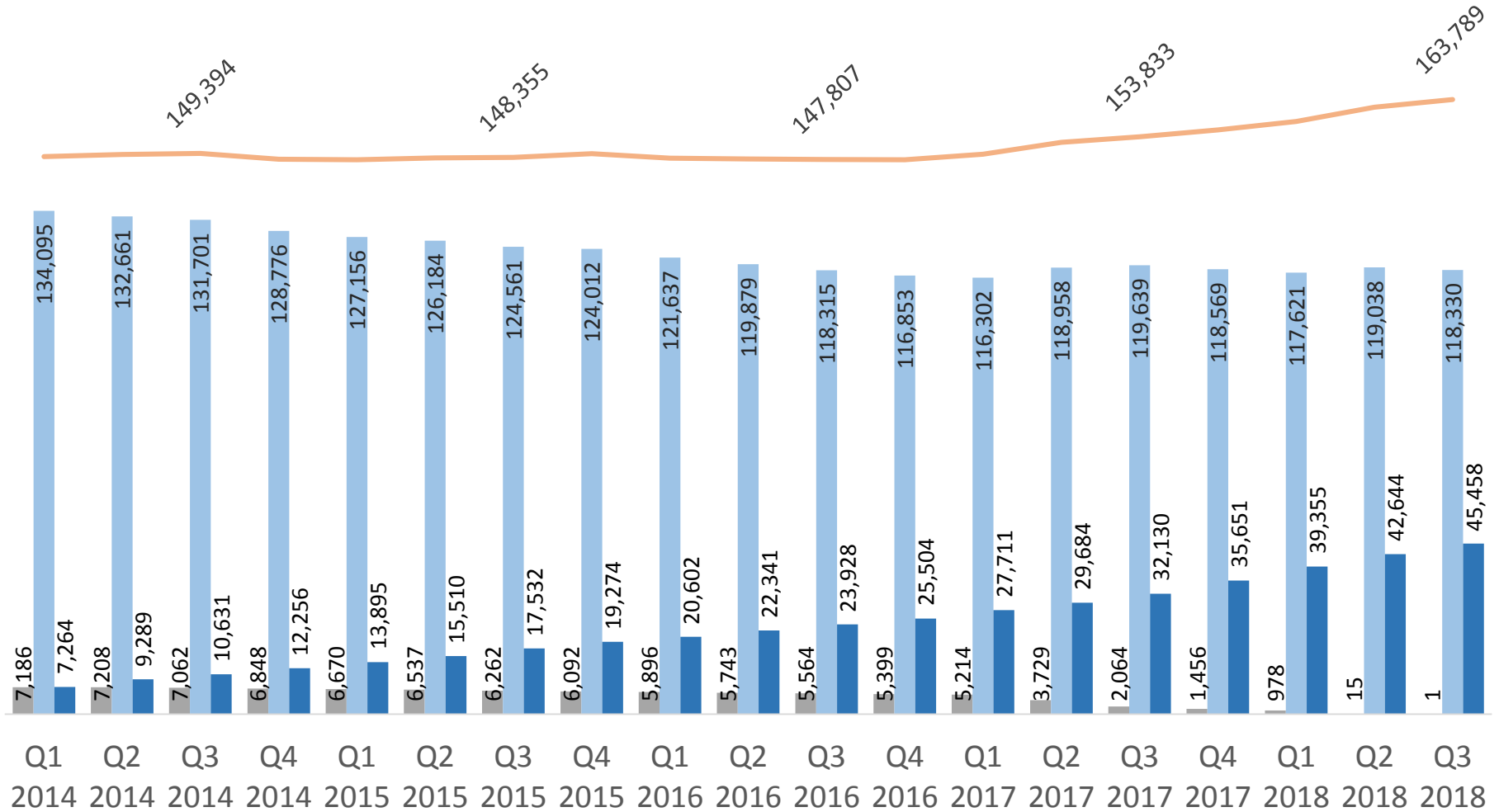


## Fixed broadband – subscriptions as at end of period



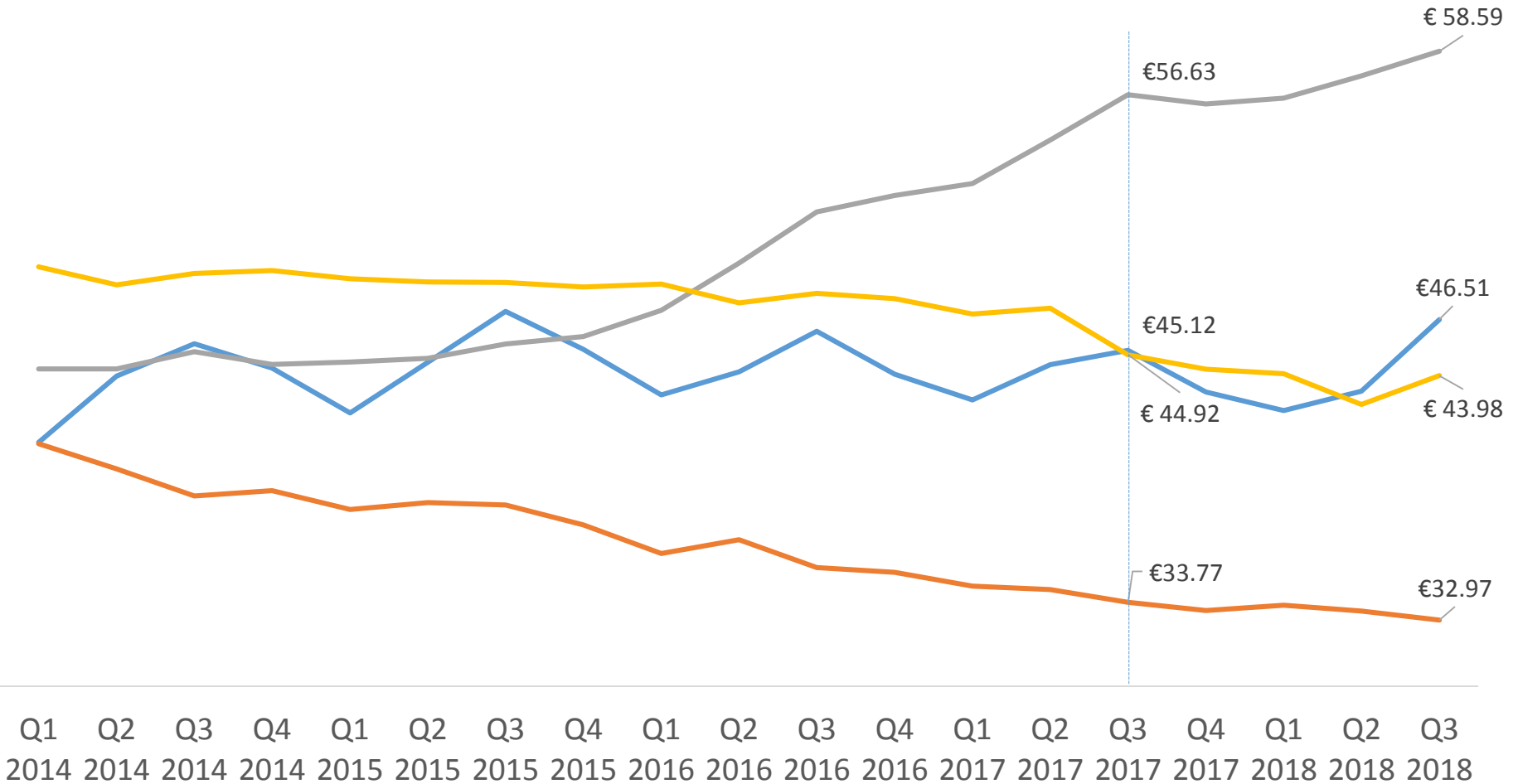
## Pay-TV – subscriptions as at end of period

■ Analogue   ■ Digital   ■ IPTV   — Total subscriptions



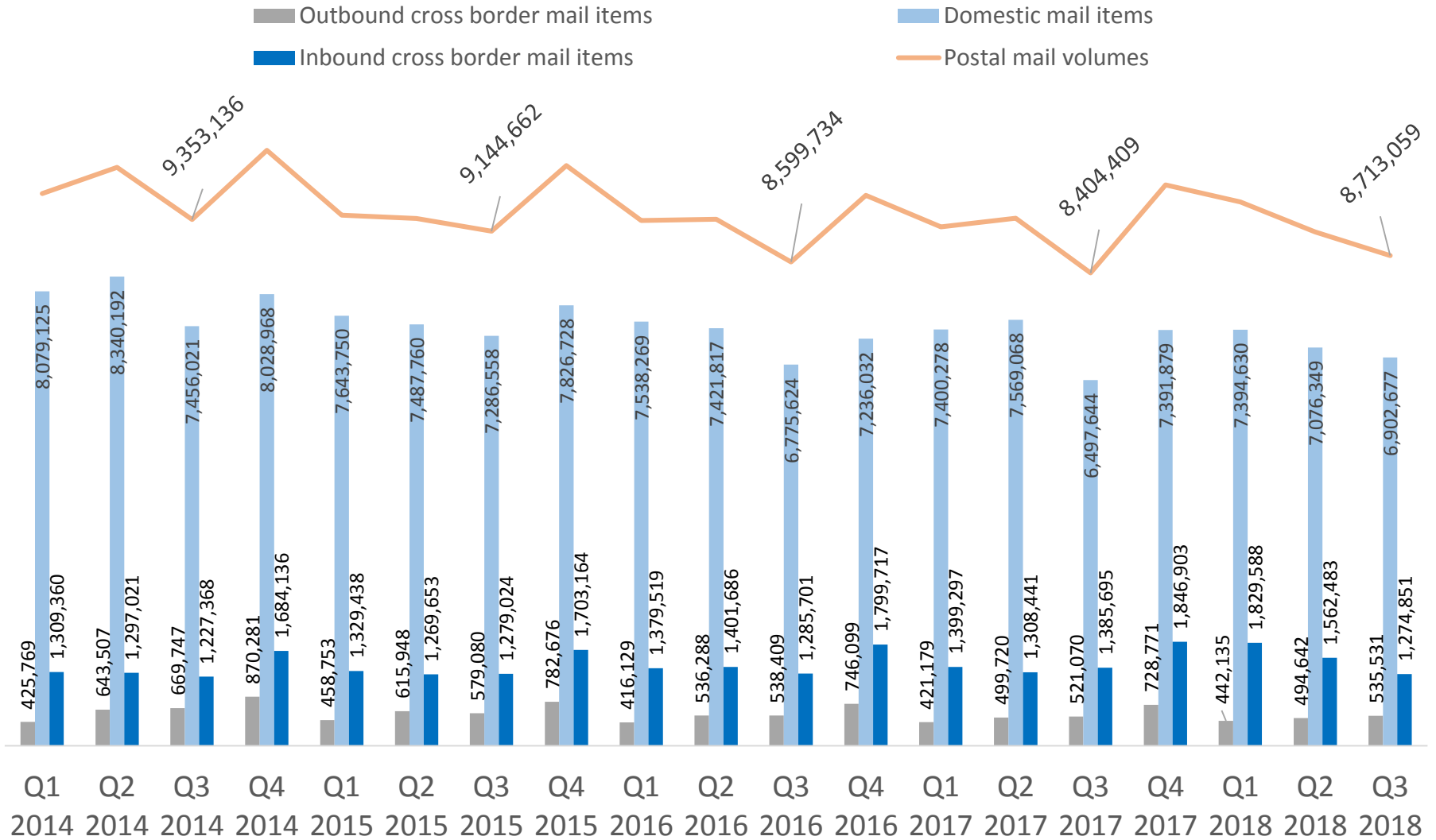
## Average revenue per user (ARPU, €)

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





## Postal – mail volumes



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