

MCA Market Trends – Q1 2022 to Q2 2026

Figures based on the Data Report Sheet (DRS) publication

MCA publication reference: MCA/R/26-6108

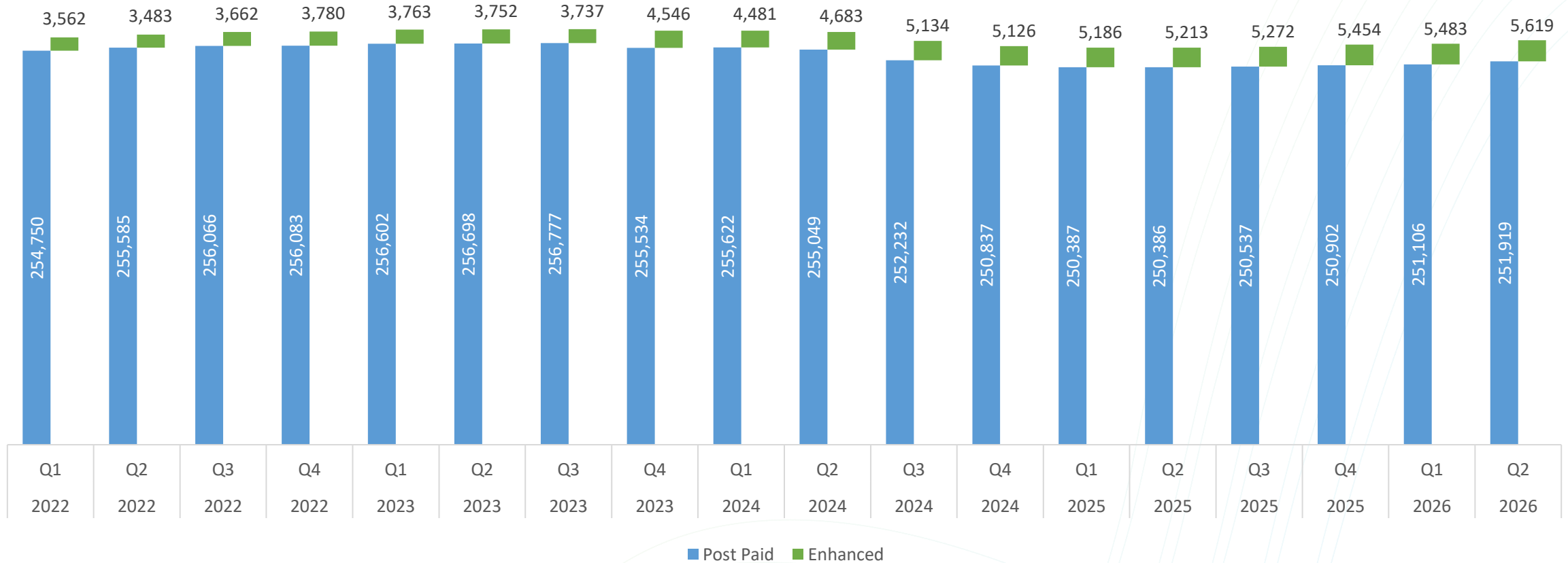


- Figures in this presentation are based on the latest Data Report Sheet (DRS) publication covering quarter 2 of 2026.
- Main indicators:
 - Number of subscriptions and ARPU for:
 - (i) fixed telephony
 - (ii) mobile telephony
 - (iii) fixed broadband
 - (iv) pay-TV
 - (v) bundles;
 - Mobile data volumes consumed by mobile telephony subscribers;
 - Number of connections for high-end fixed connectivity services;
 - Mail volumes for the postal sector.
- Data freeze carried out on 28th September 2026.

Fixed telephony



Subscriptions as at end of period

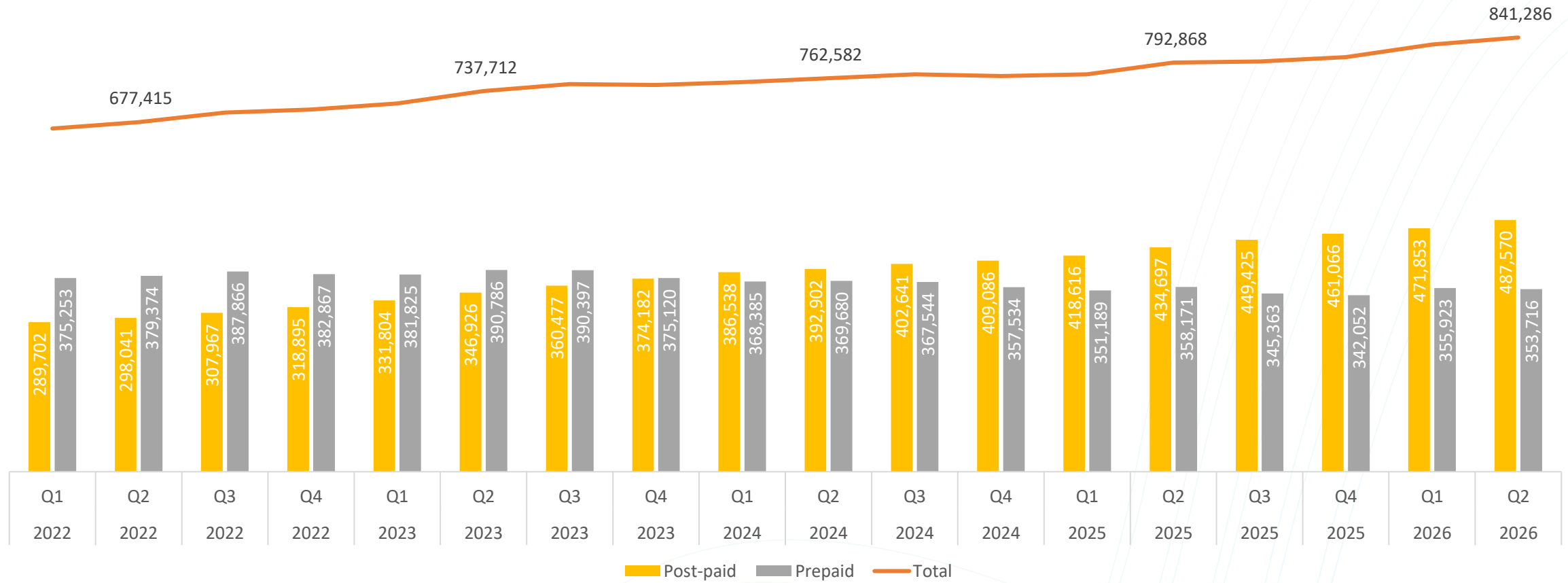


Pre-paid fixed telephony figures are very small, totalling to 12 subscriptions as at end-Q2 2026.

Mobile telephony



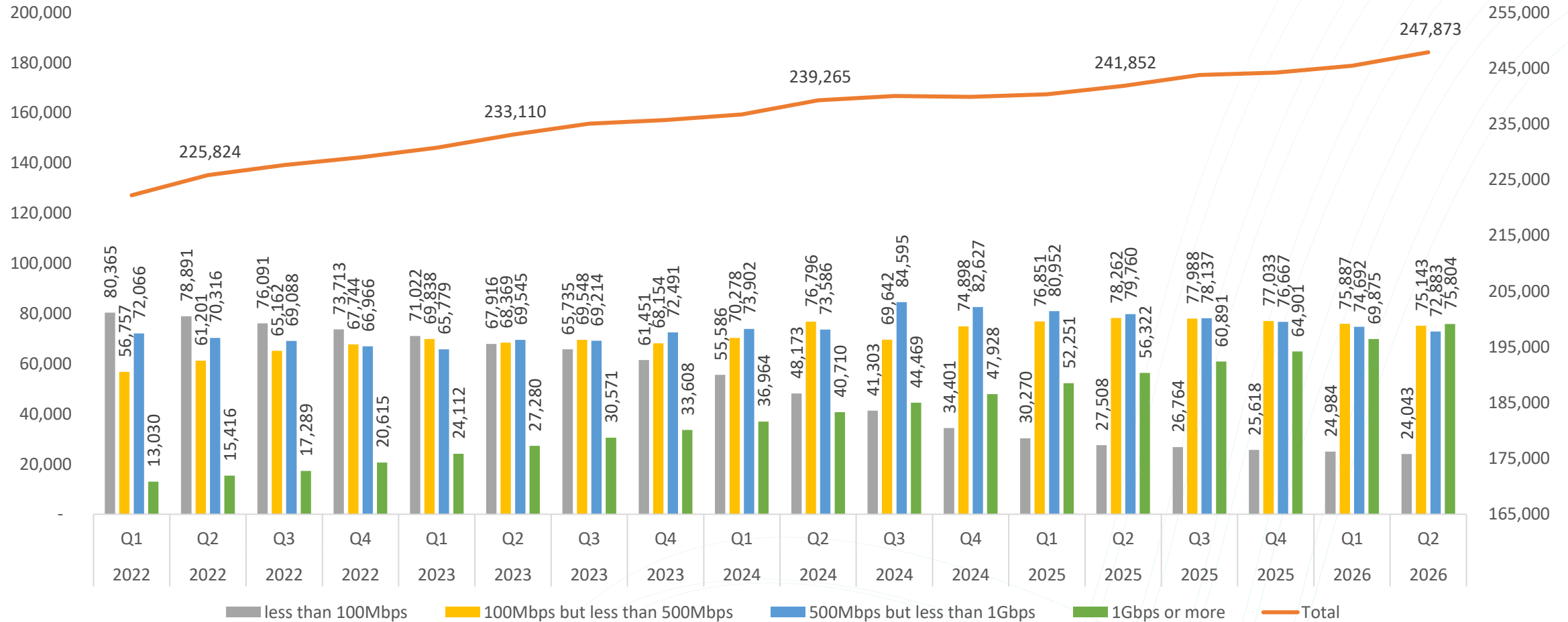
Subscriptions as at end of period



Fixed internet



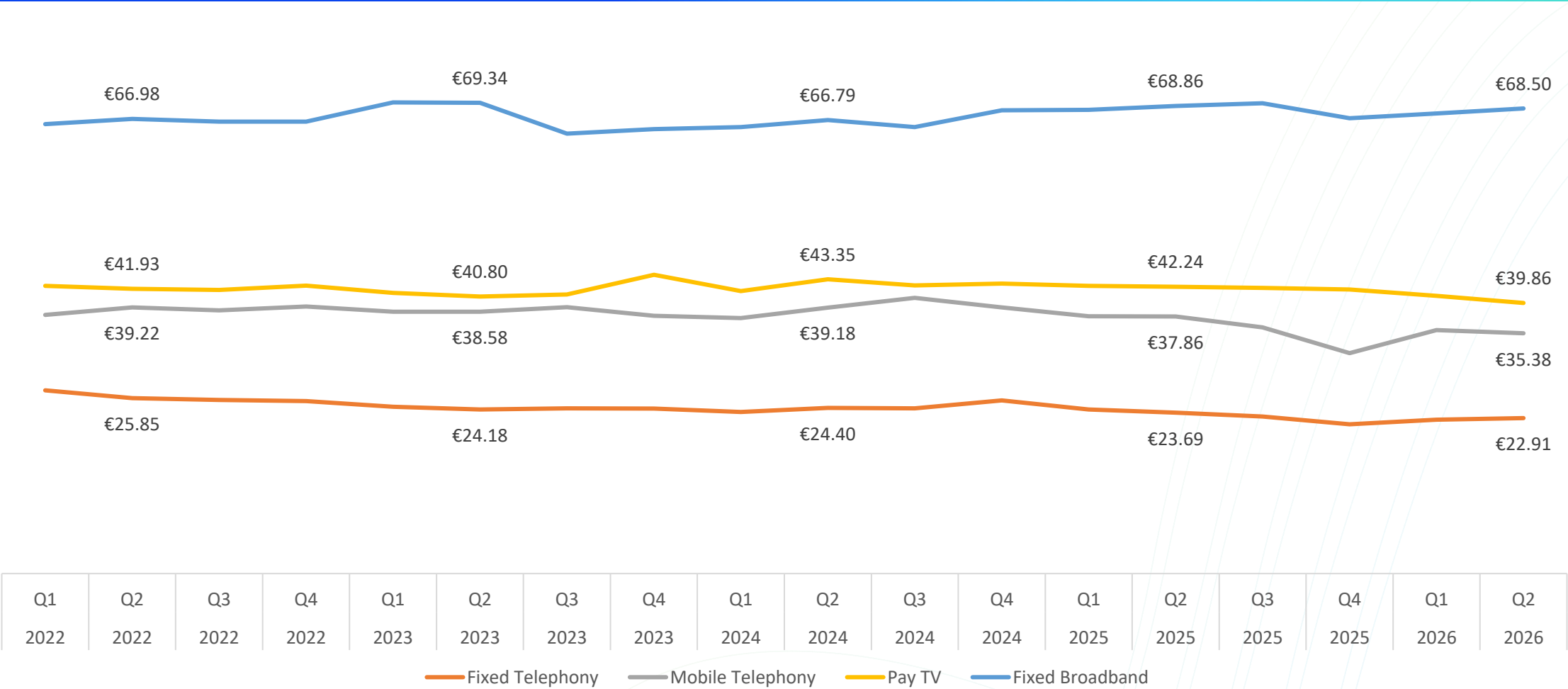
Subscriptions as at end of period



Subscriptions as at end of period



Average revenue per user (ARPU, €)



This indicator captures the average quarterly revenue per subscription reported by local service providers for each service. The revenue element for each individual service is composed of both stand-alone and bundle revenues from subscriptions to a specific service but excludes installation and connection revenues. Readers should note that operators are left at their discretion to allocate their bundled revenues to individual services.

Bundle ARPU (€)

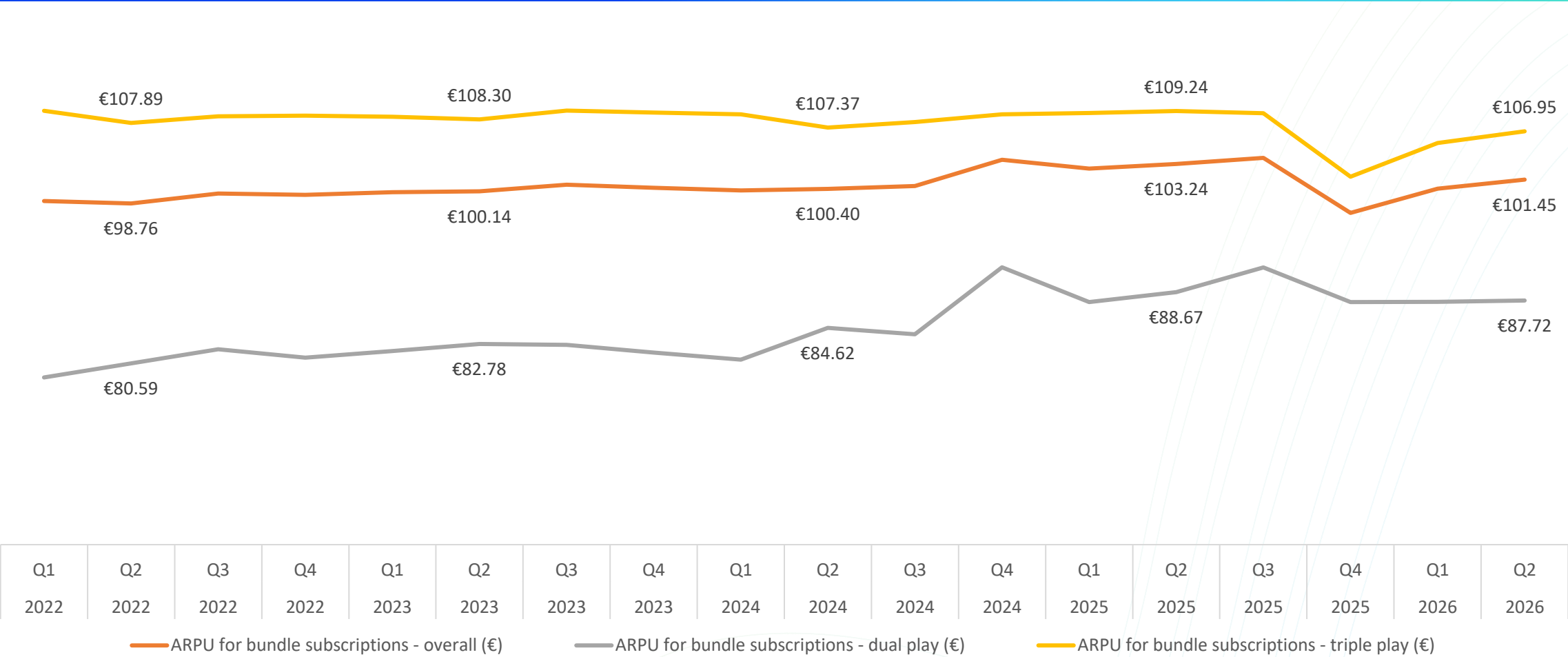
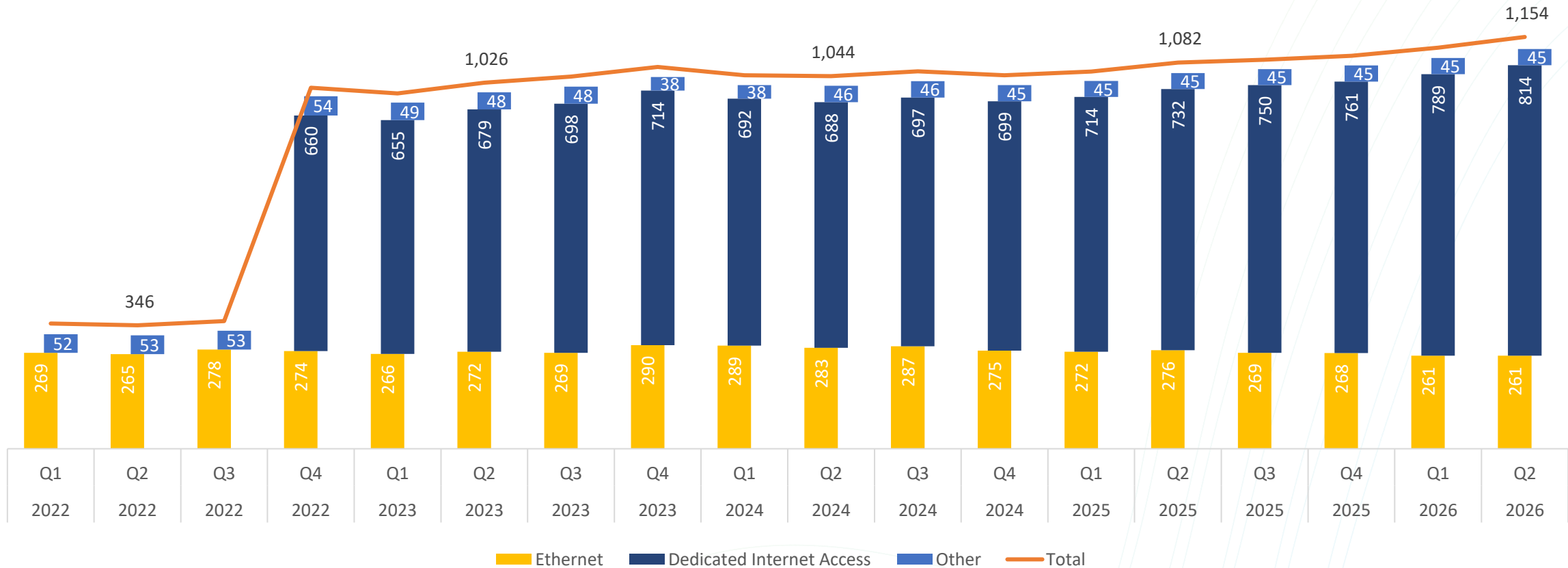


Diagram depicts trends for the average quarterly revenue per subscription on a bundle. The revenue element excludes installation and connection revenues. Readers should note that operators are left at their discretion to allocate their bundled revenues to each individual service in the bundle subscription.

Business high-end fixed connectivity



National connections for business users as at end of period



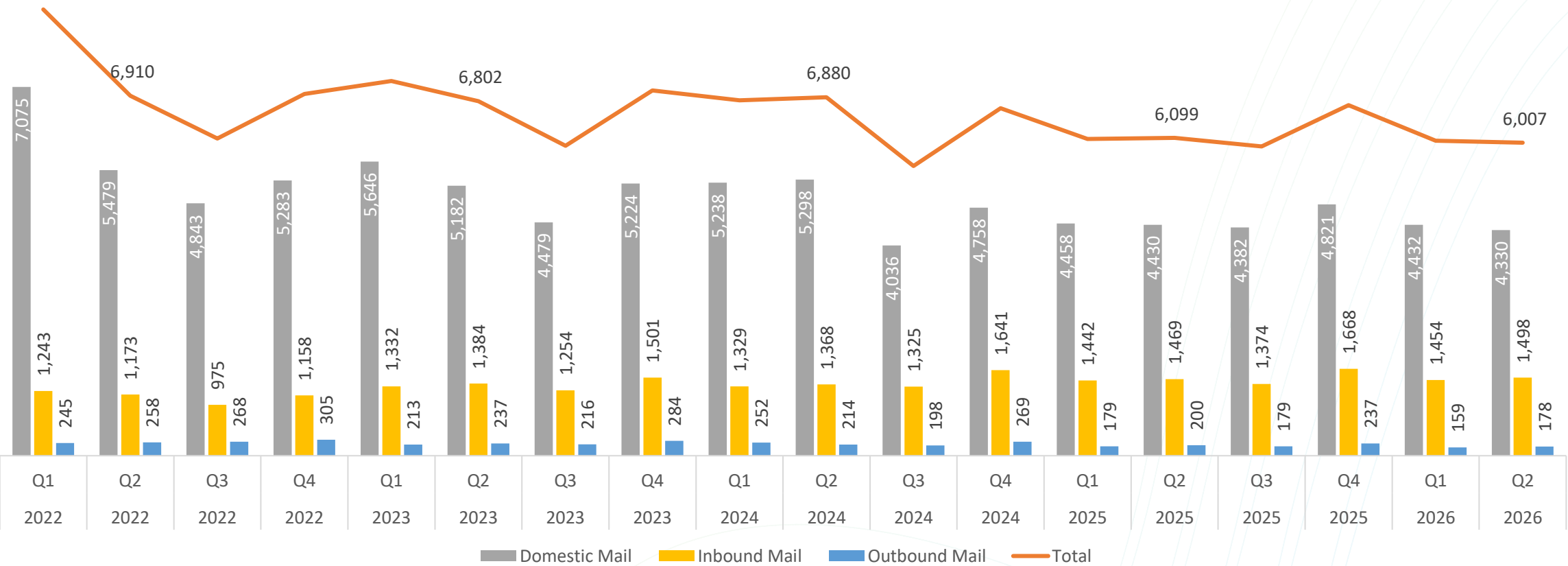
As from Q4 2022, the data includes Dedicated Internet Access (DIA) connections, alongside legacy business-grade subscriptions and subscriptions to Traditional Leased Lines, Ethernet Interface, Microwave and WDM.

Other high-end fixed connectivity services include Microwave connections, Wavelength Digital Multiplexing (DWM) and Traditional Interface (TI) connections.

Postal activity – mail volumes (1)

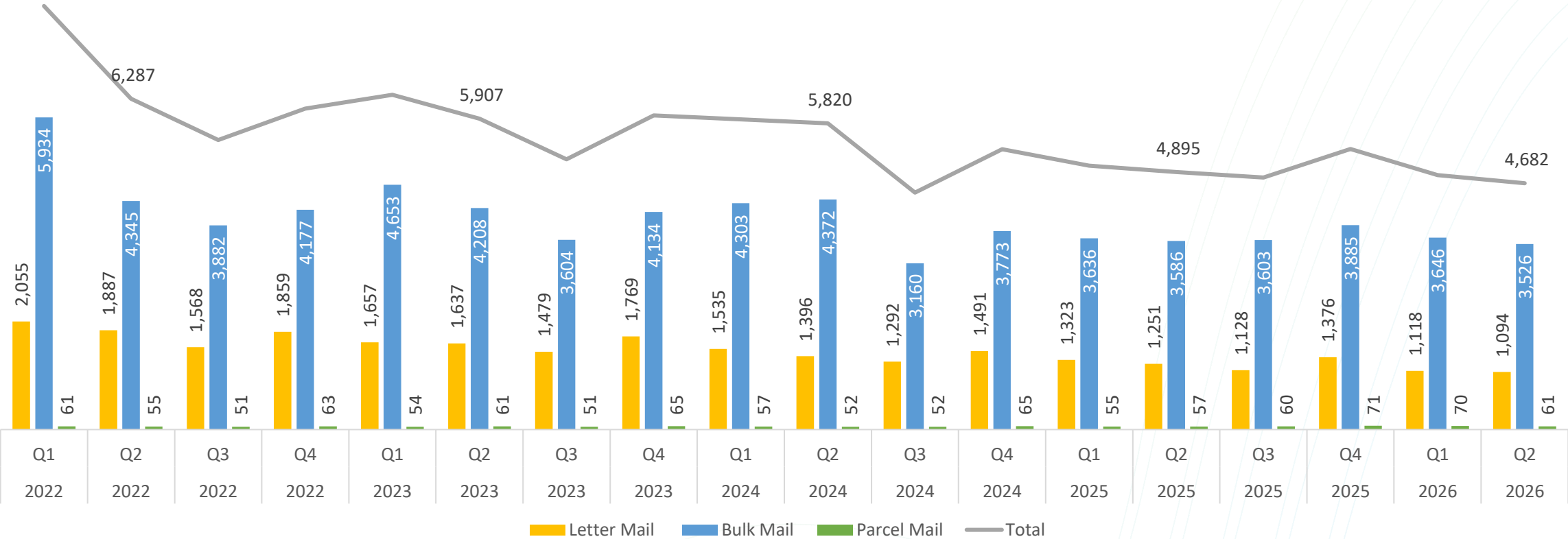


Total mail items (in 000's)



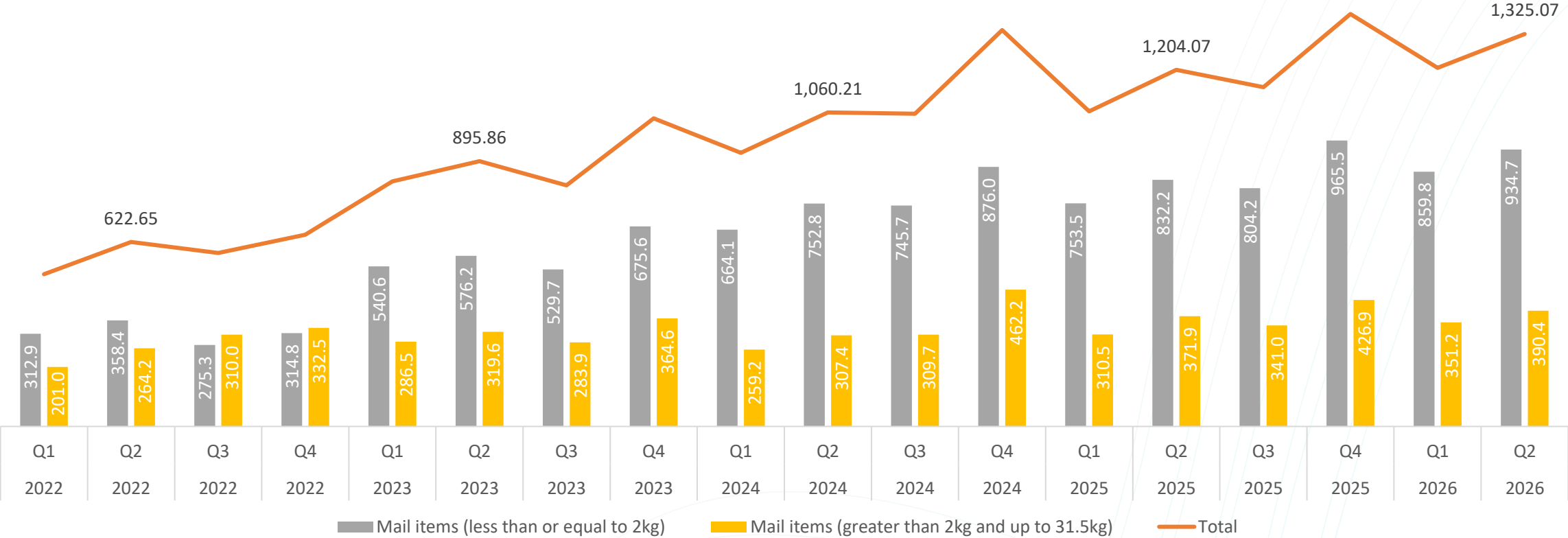
A break in series occurs in Q4 2025 due to changes in postal data mappings. As a result, data from Q4 2025 onwards are not directly comparable with earlier periods. Historical data have not been revised.

Postal activity – mail volumes (2)



A break in series occurs in Q4 2025 due to changes in postal data mappings. As a result, data from Q4 2025 onwards are not directly comparable with earlier periods. Historical data have not been revised.

Postal activity – mail volumes (3)



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