

MCA Market Trends – Q1 2021 to Q3 2025

Figures based on the Data Report Sheet (DRS) publication

MCA publication reference: MCA/R/26-5851

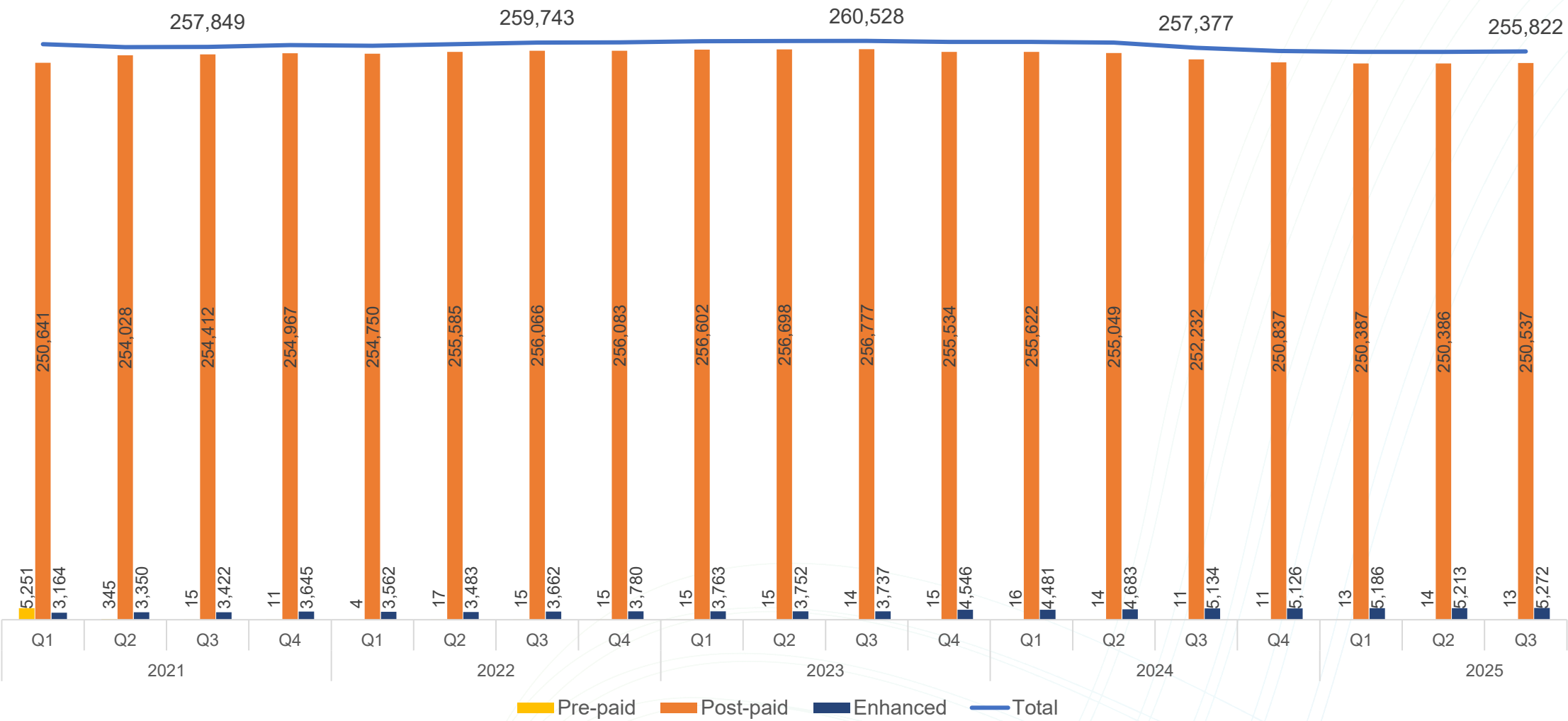


- Figures in this presentation are based on the latest Data Report Sheet (DRS) publication.
- Main indicators:
 - Number of subscriptions and ARPU for:
 - (i) fixed telephony
 - (ii) mobile telephony
 - (iii) fixed broadband
 - (iv) pay-TV
 - (v) bundles;
 - Mobile data volumes consumed by mobile telephony subscribers;
 - Number of connections for high-end fixed connectivity services;
 - Mail volumes for the postal sector.
- Data freeze carried out on 16th January 2026.

Fixed telephony



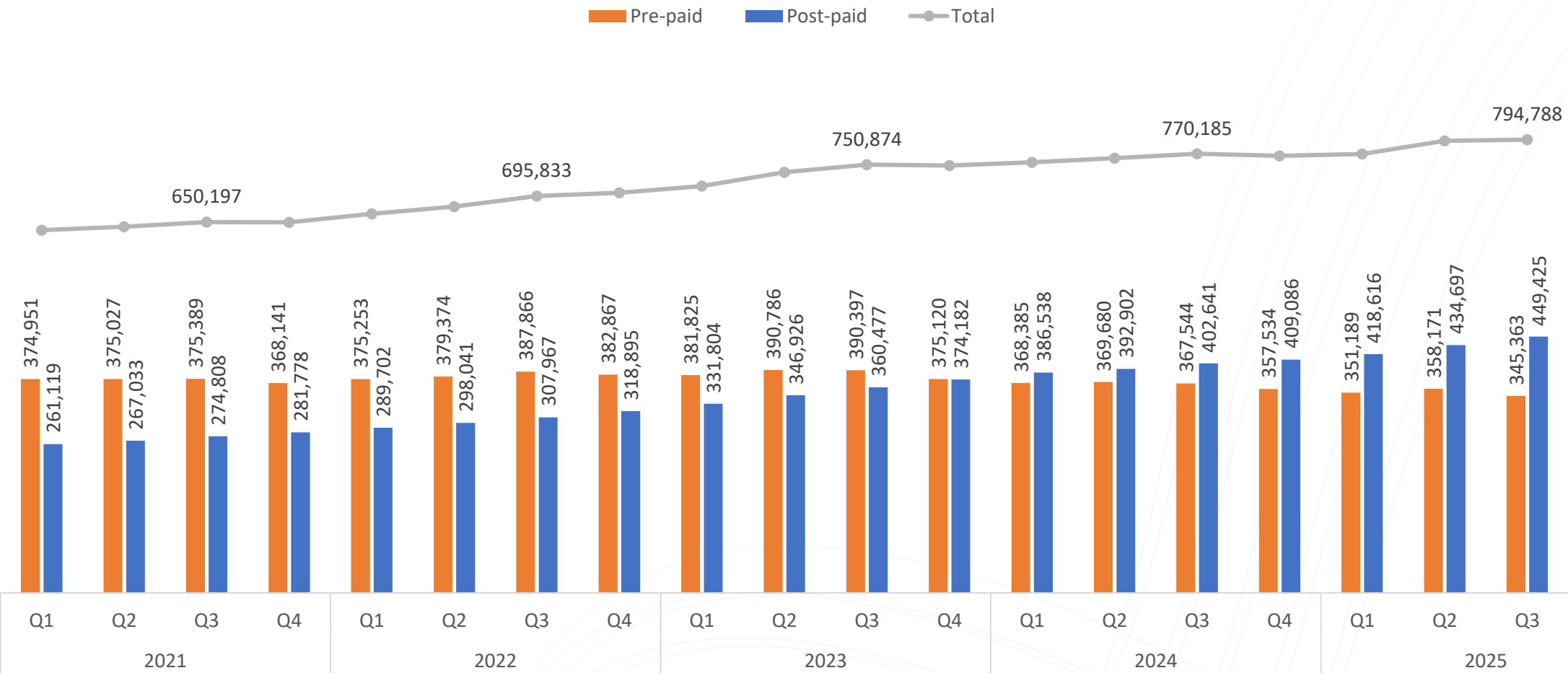
Subscriptions as at end of period



Mobile telephony



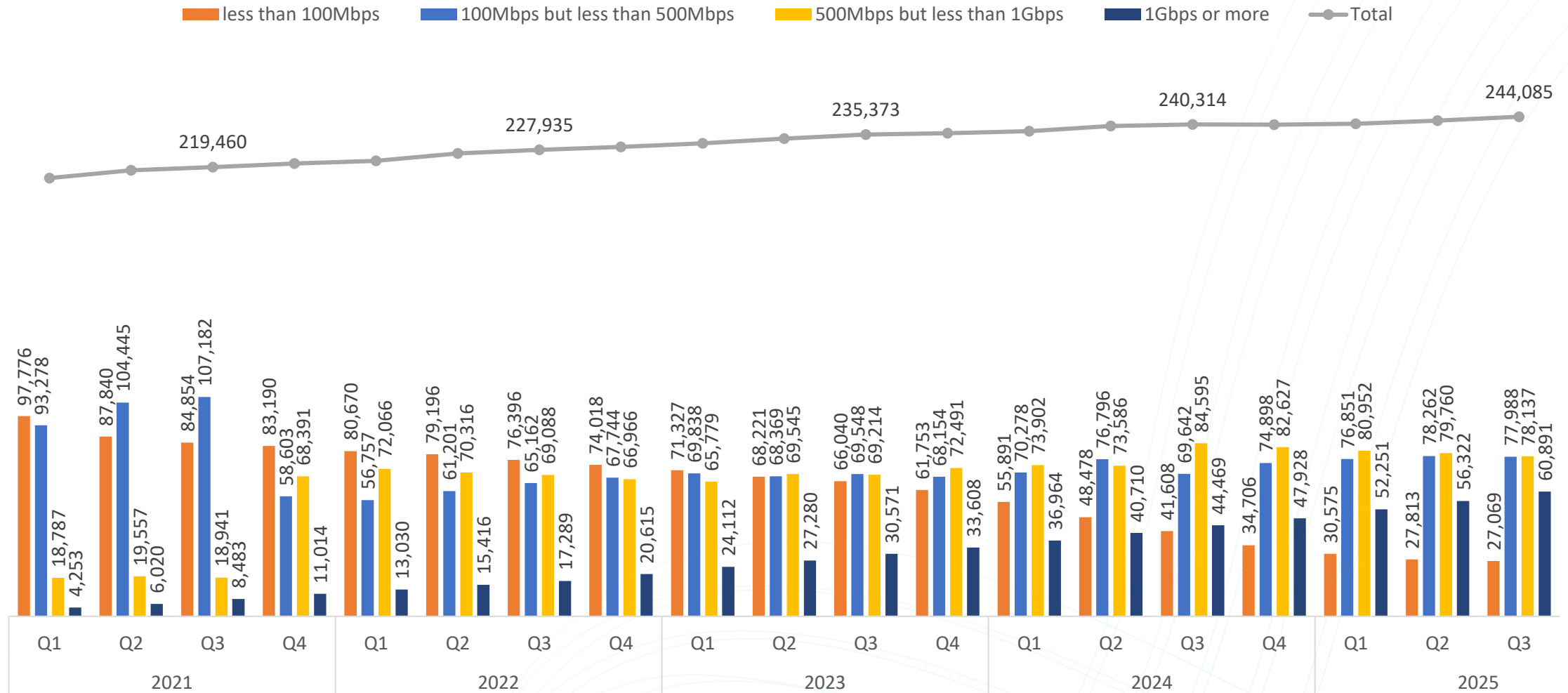
Subscriptions as at end of period



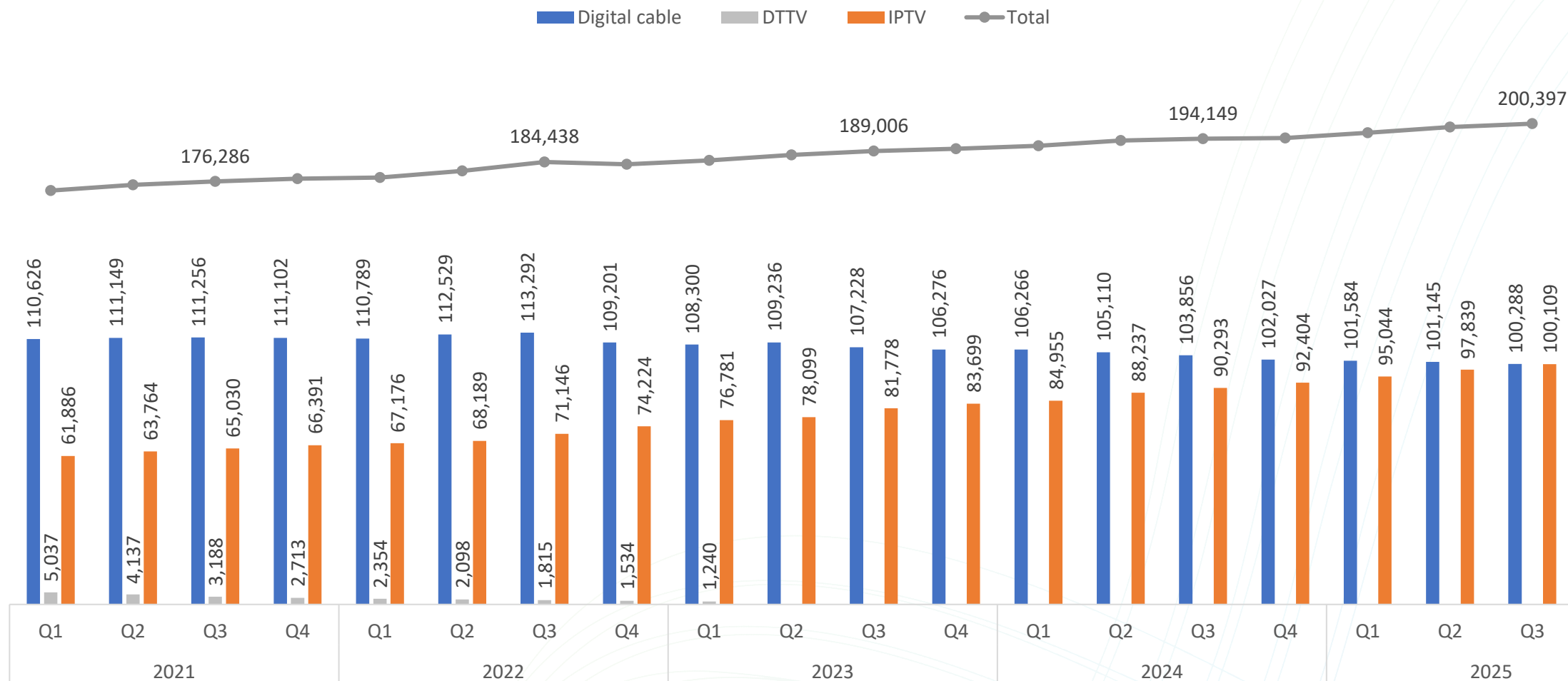
Fixed internet



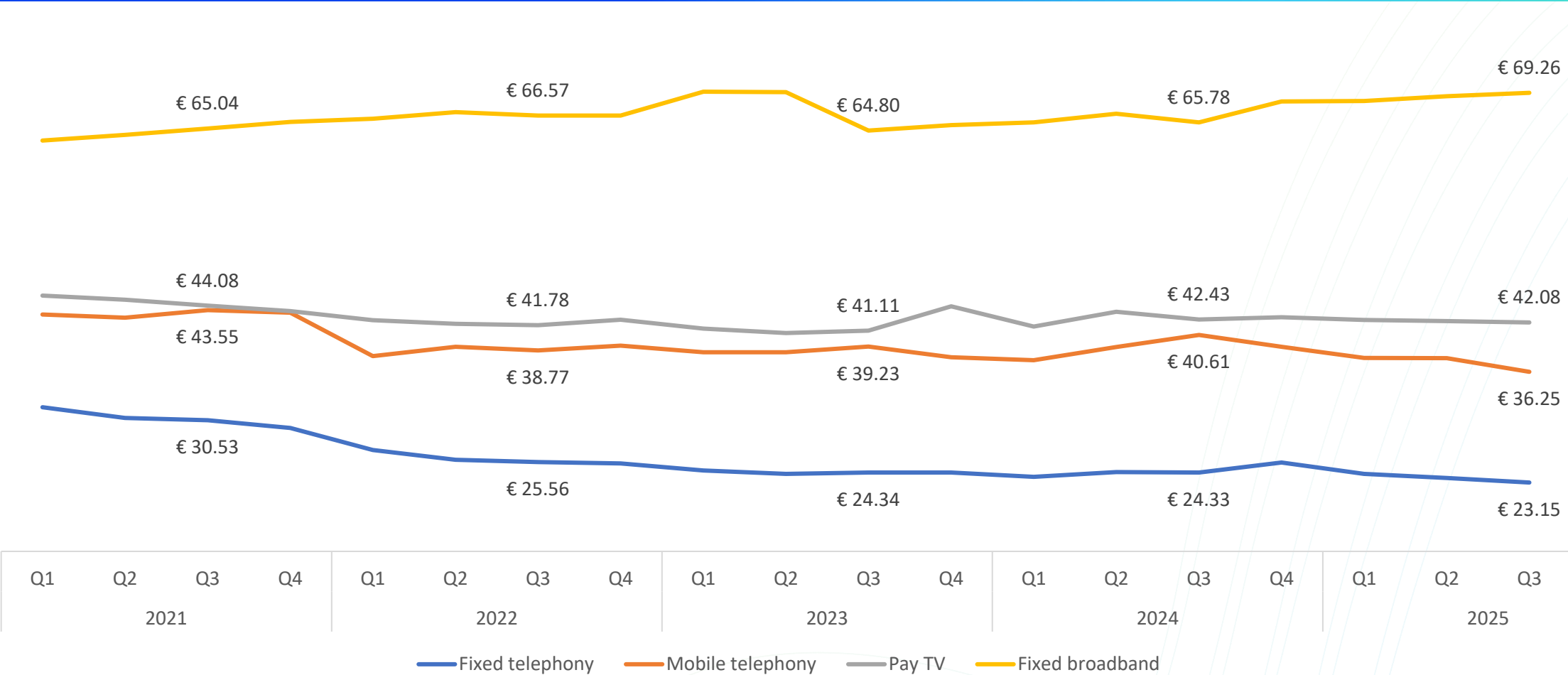
Subscriptions as at end of period



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 (€)

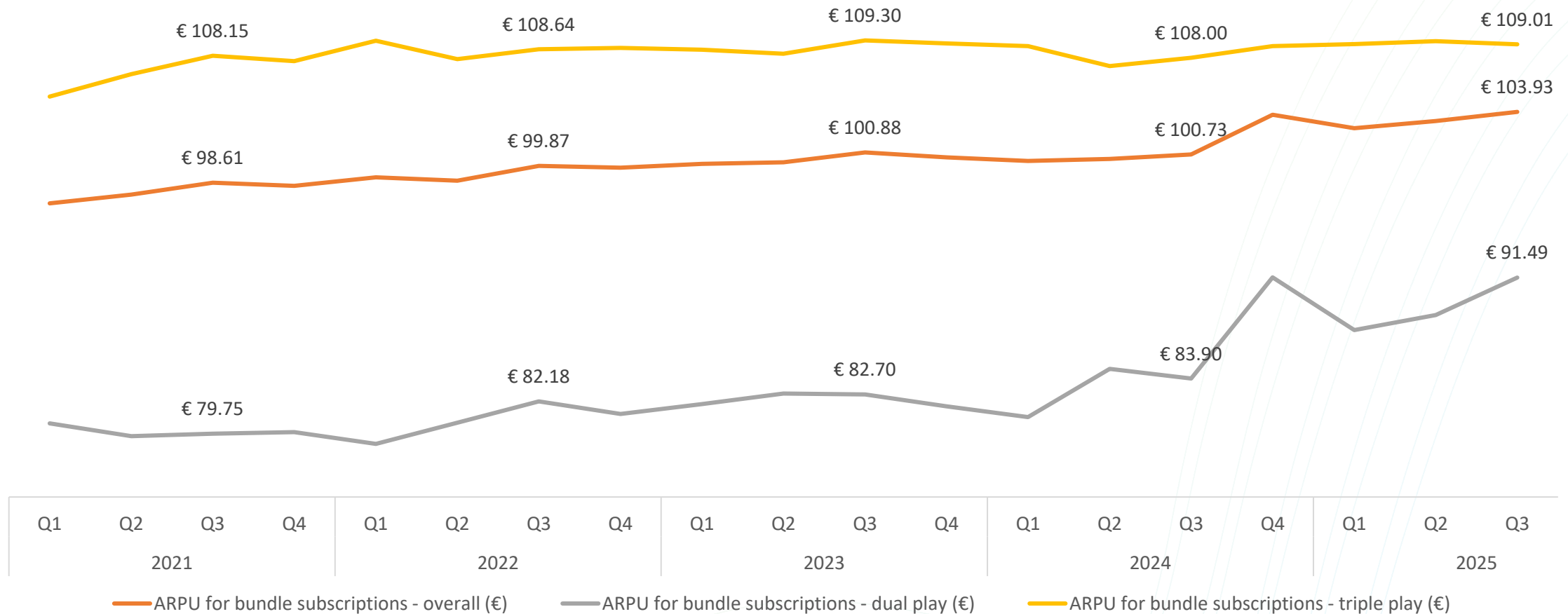
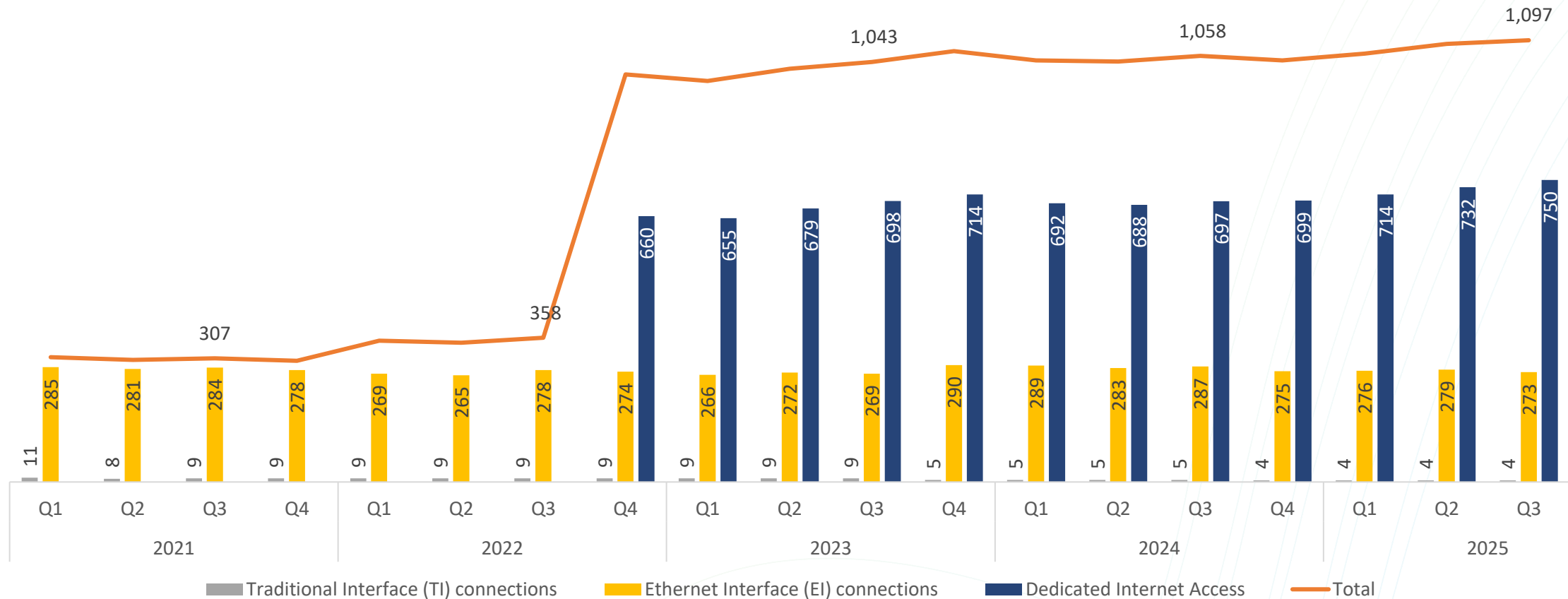


Diagram depicts trends for the average quarterly revenue per subscription on a bundle. The revenue element excludes installation and connection revenues. Readers should note that operators are left at their discretion to allocate their bundled revenues to each individual service in the bundle subscription.

High-end fixed connectivity



National connections for business users as at end of period

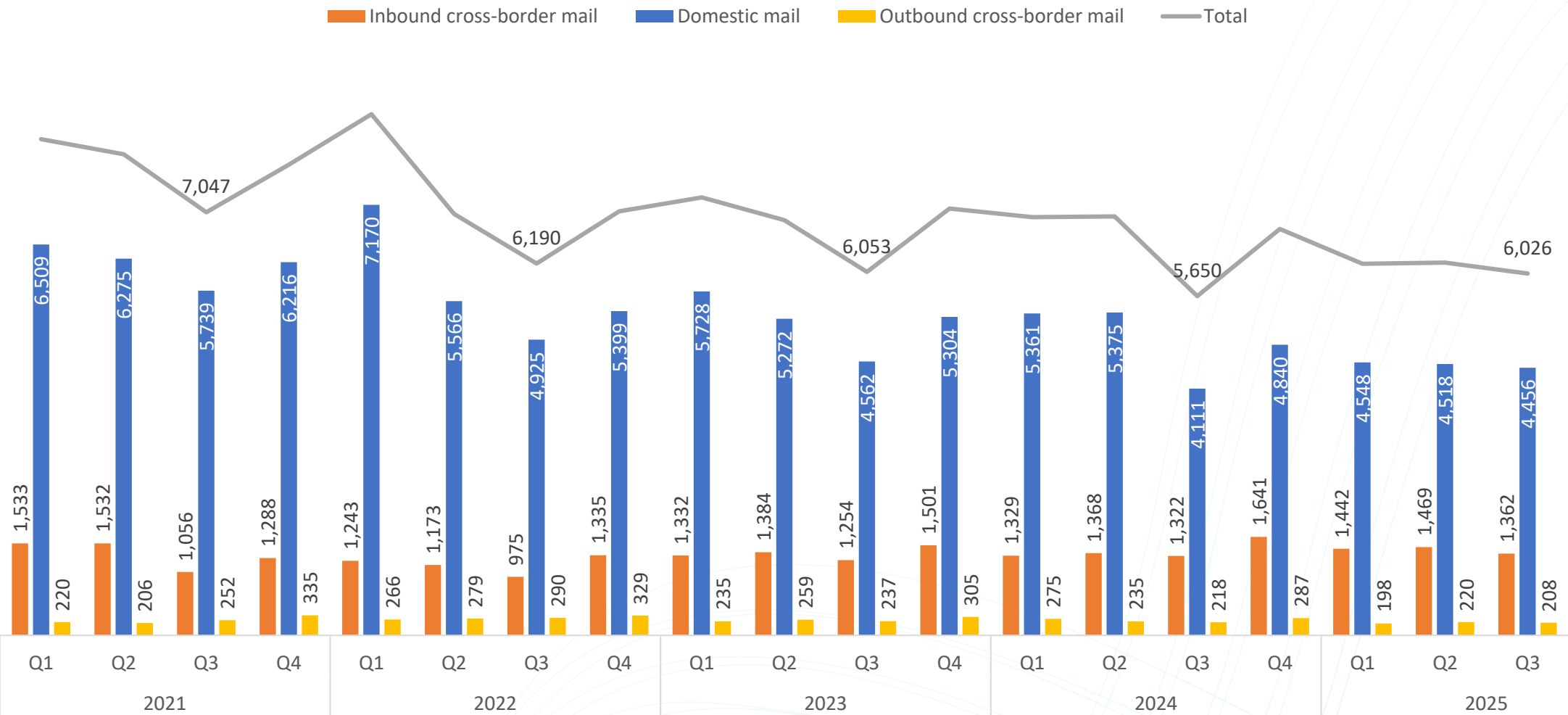


As from Q4 2022, the data includes Dedicated Internet Access (DIA) connections, alongside legacy business-grade subscriptions and subscriptions to Traditional Leased Lines, Ethernet Interface, Microwave and WDM.

Postal activity – mail volumes (1)



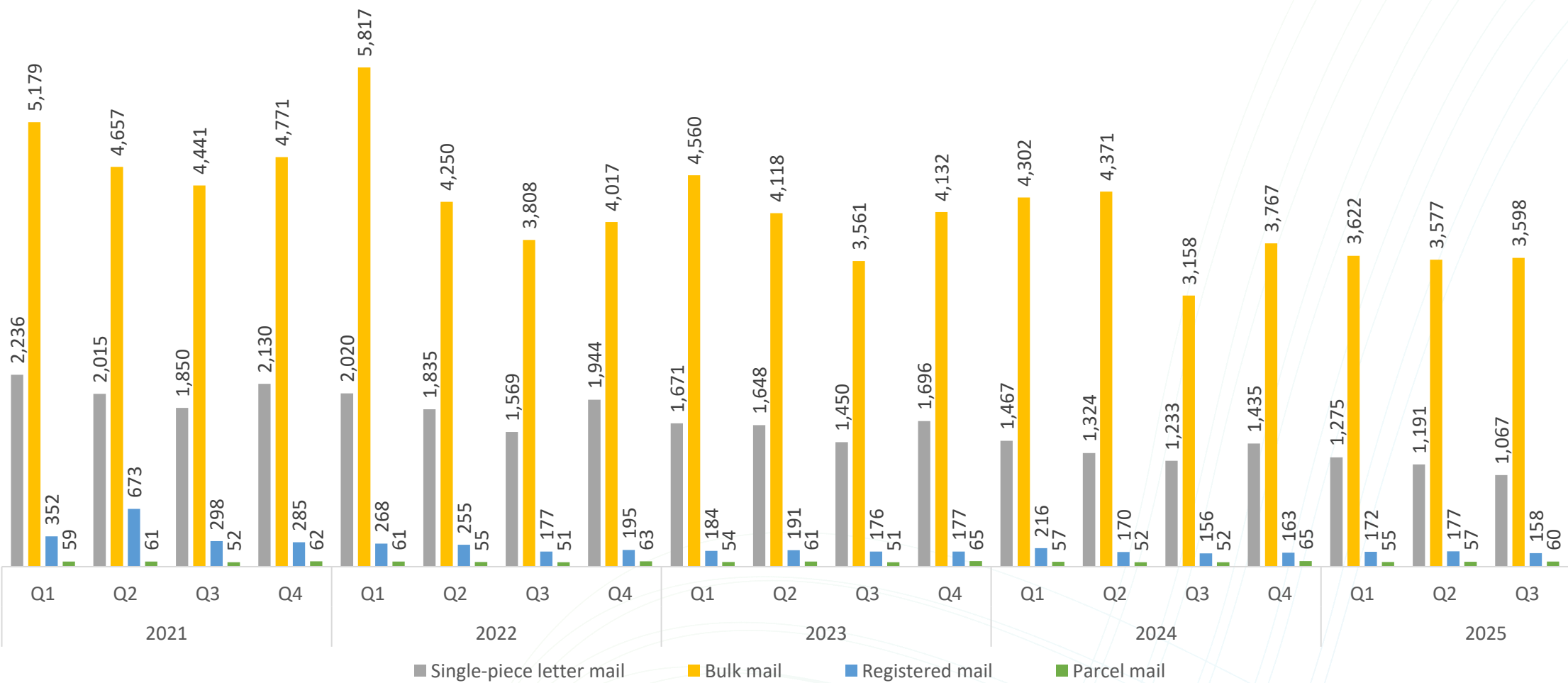
Postal mail volumes (in 000's)



Postal activity – mail volumes (2)



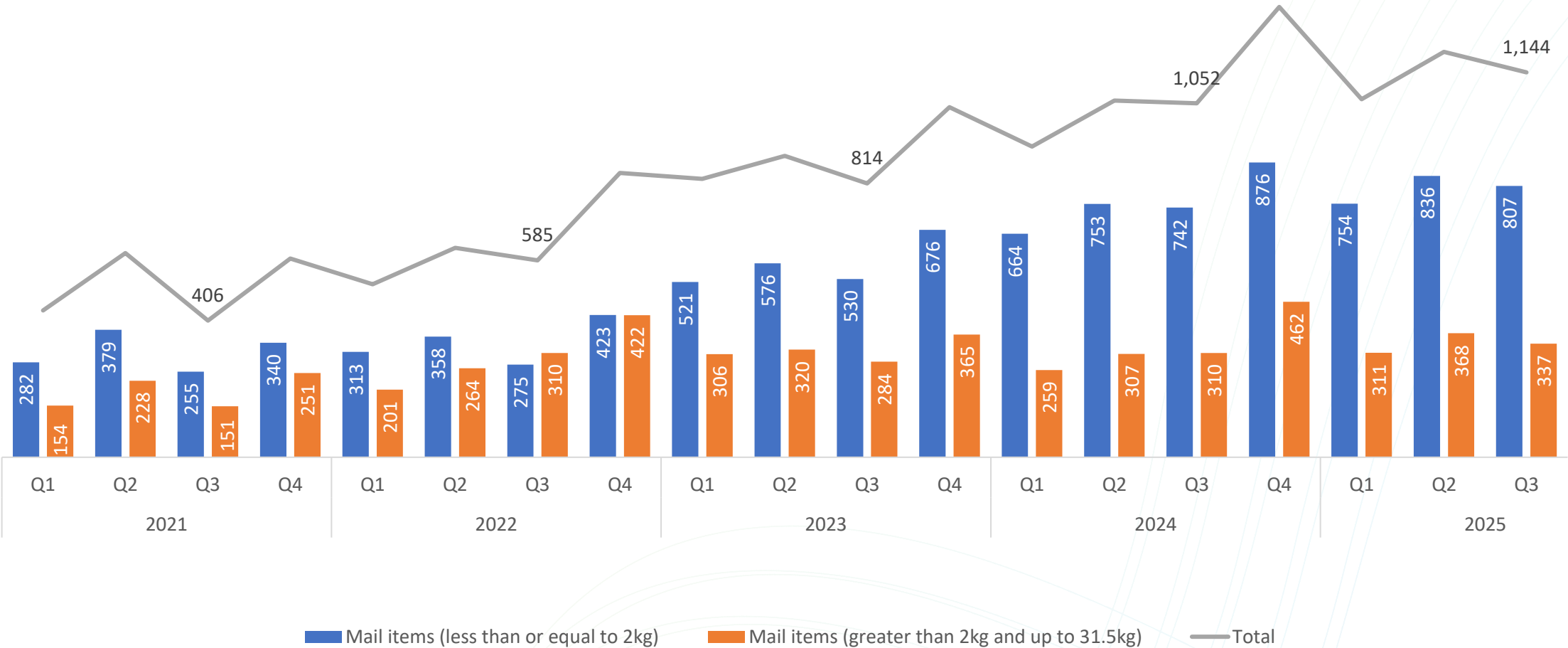
Within the scope of the universal service (in 000's)



Postal activity – mail volumes (2)



Outside the scope of the universal service (in 000's)



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