

MCA Market Trends – Q1 2021 to Q4 2025

Figures based on the Data Report Sheet (DRS) publication

MCA publication reference: MCA/R/26-5928

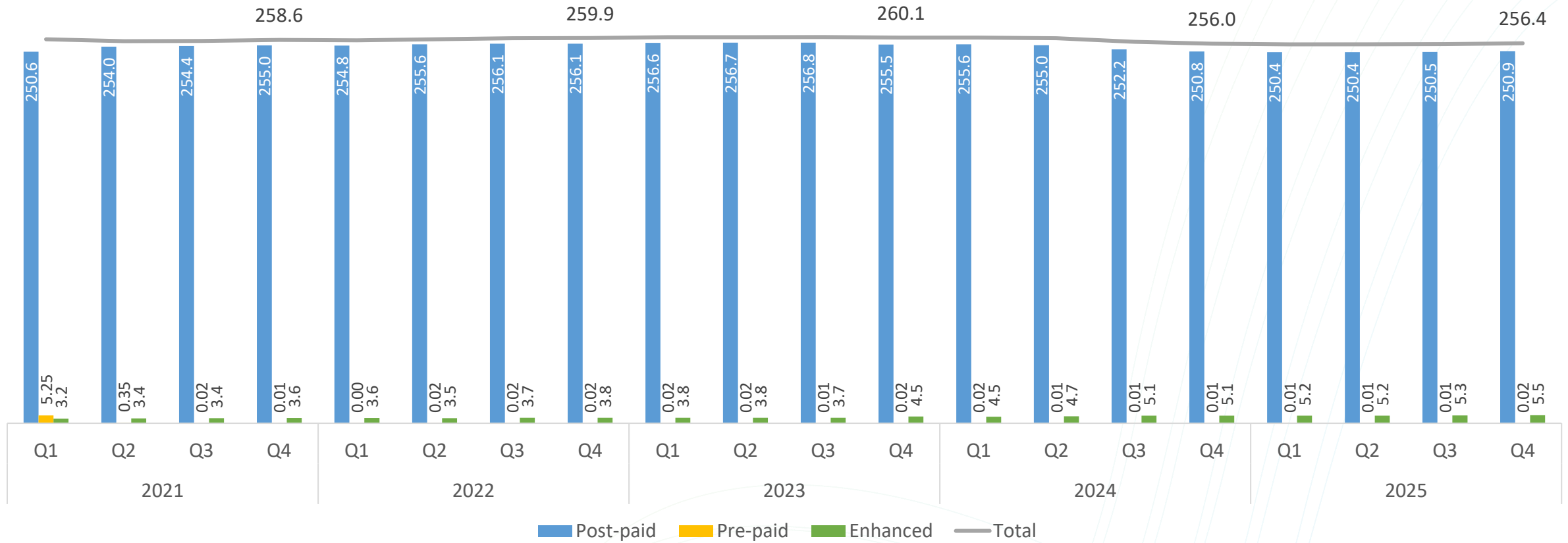


- Figures in this presentation are based on the latest Data Report Sheet (DRS) publication covering quarter 4 of 2025.
- Main indicators:
 - Number of subscriptions and ARPU for:
 - (i) fixed telephony
 - (ii) mobile telephony
 - (iii) fixed broadband
 - (iv) pay-TV
 - (v) bundles;
 - Mobile data volumes 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 2nd April 2026.

Fixed telephony



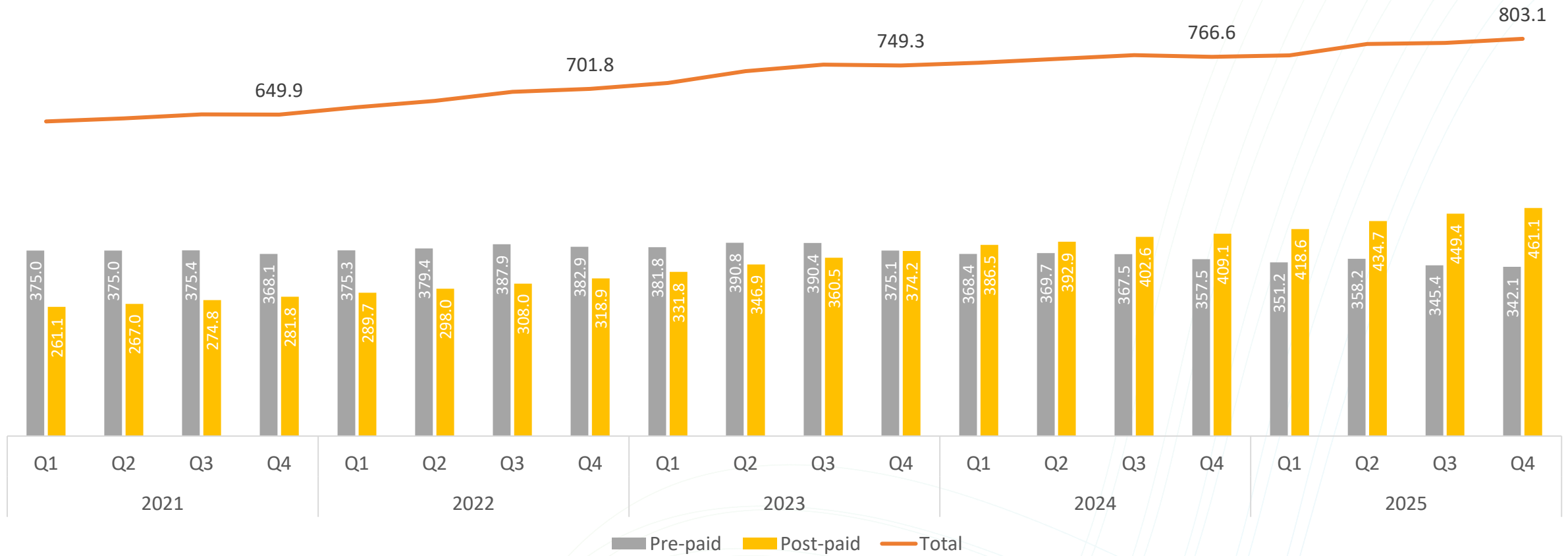
Subscriptions as at end of period (in 000's)



Mobile telephony



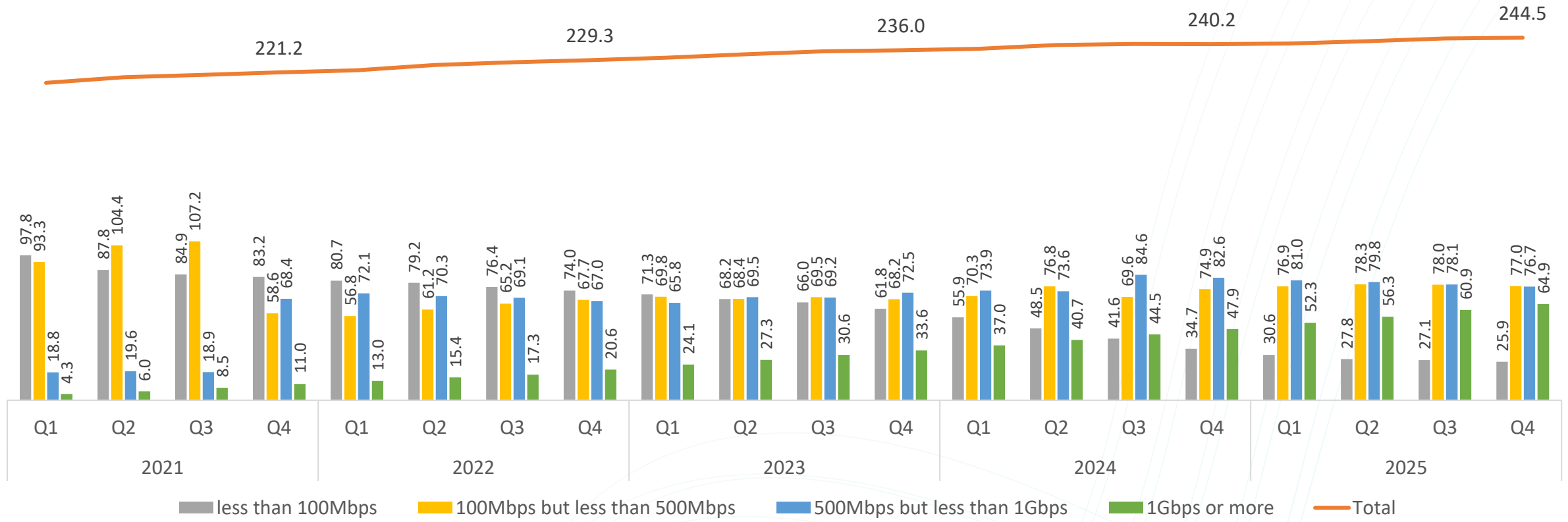
Subscriptions as at end of period (in 000's)



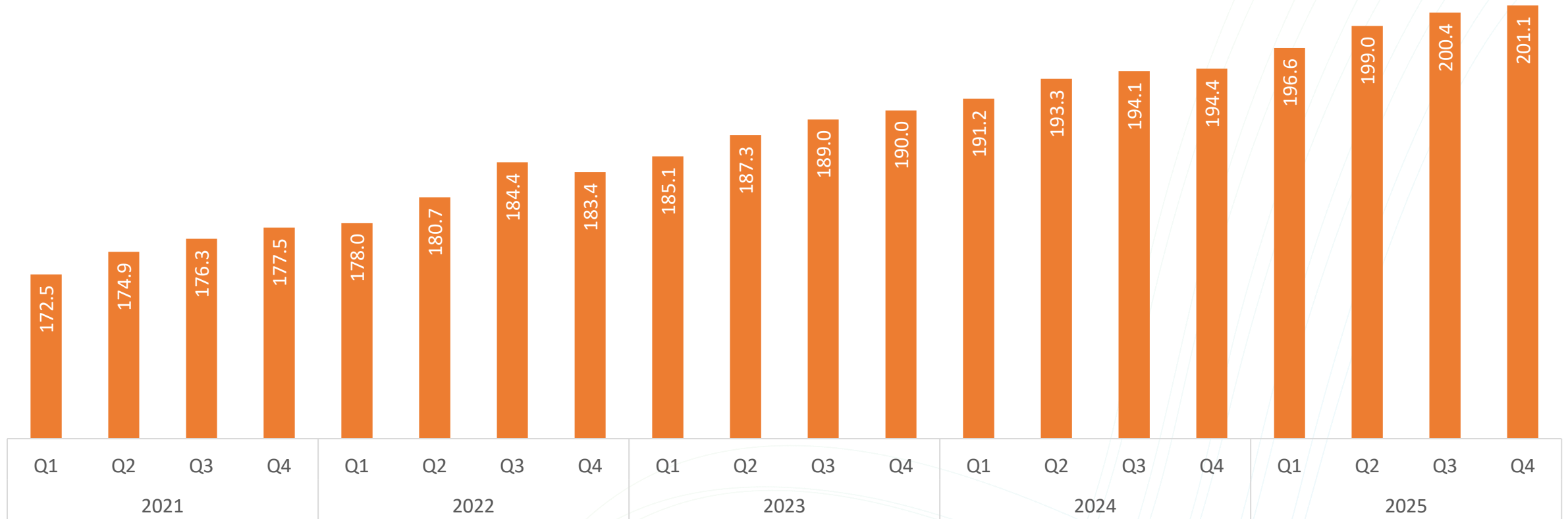
Fixed internet



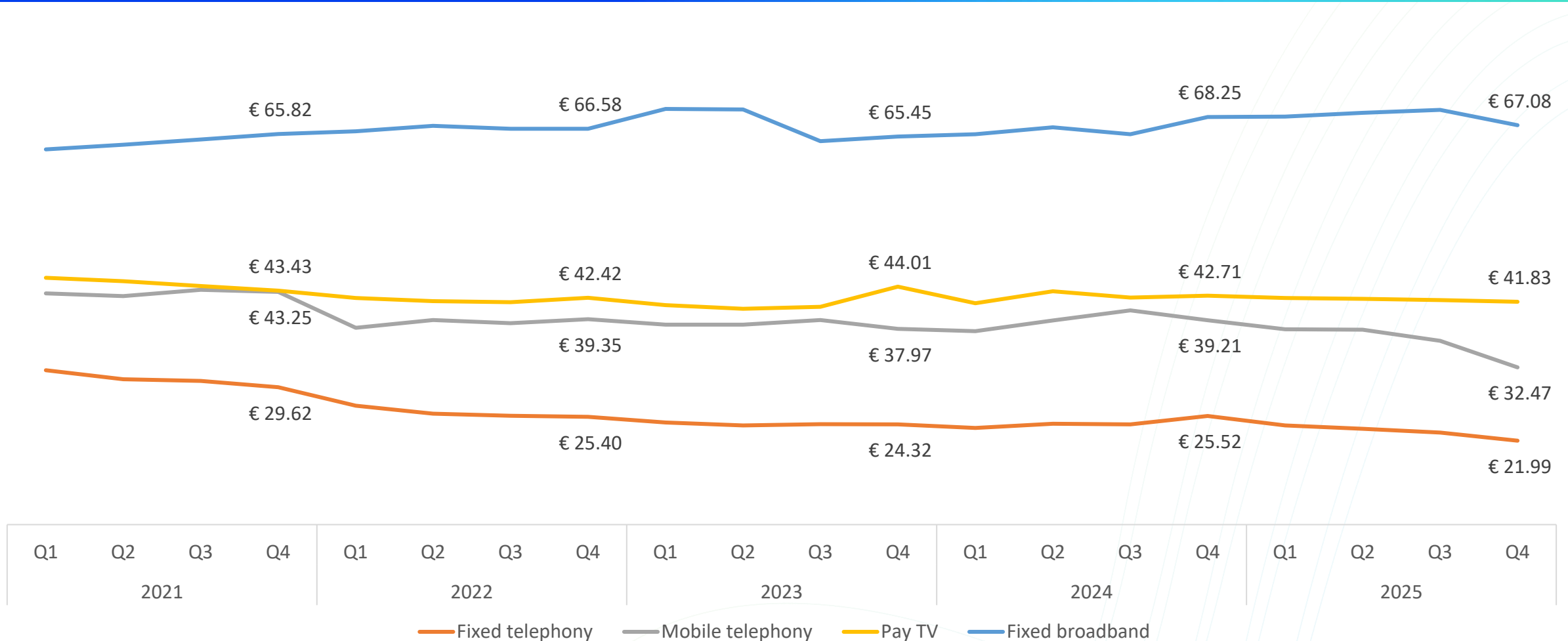
Subscriptions as at end of period (in 000's)



Subscriptions as at end of period (in 000's)



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 (€)

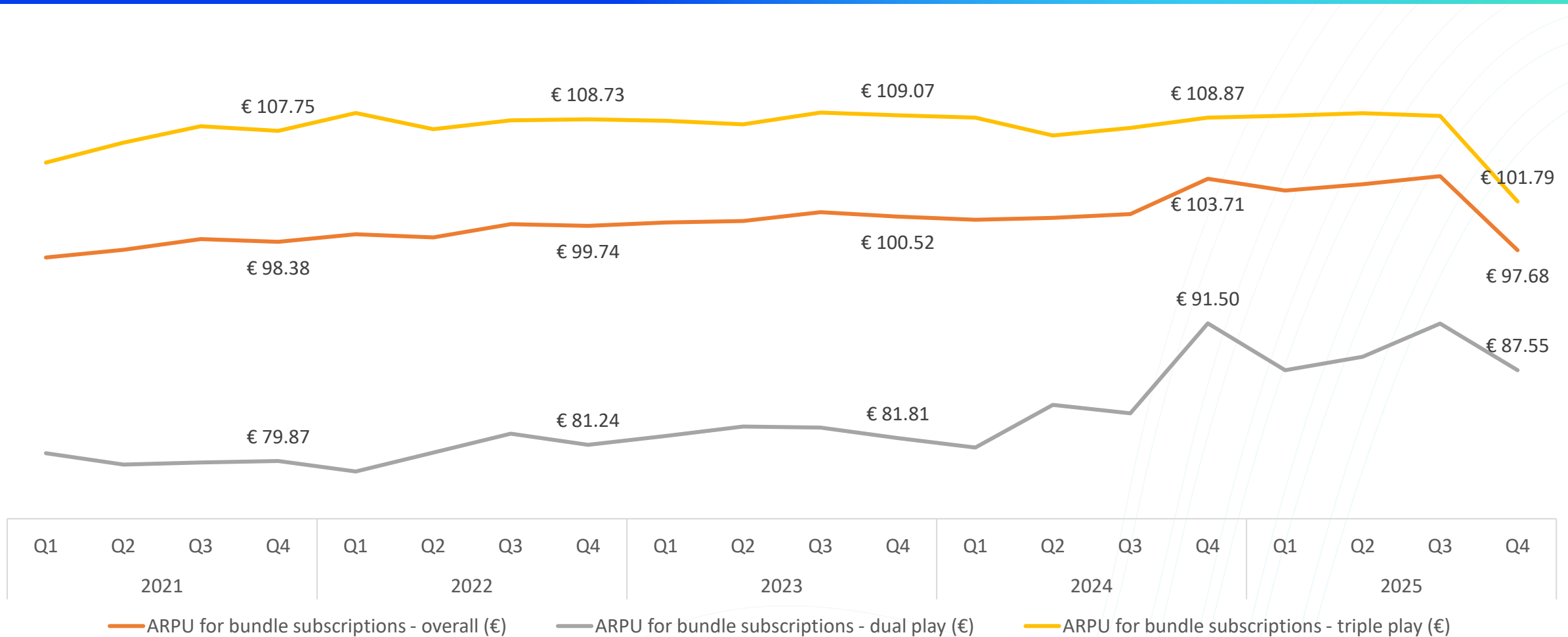
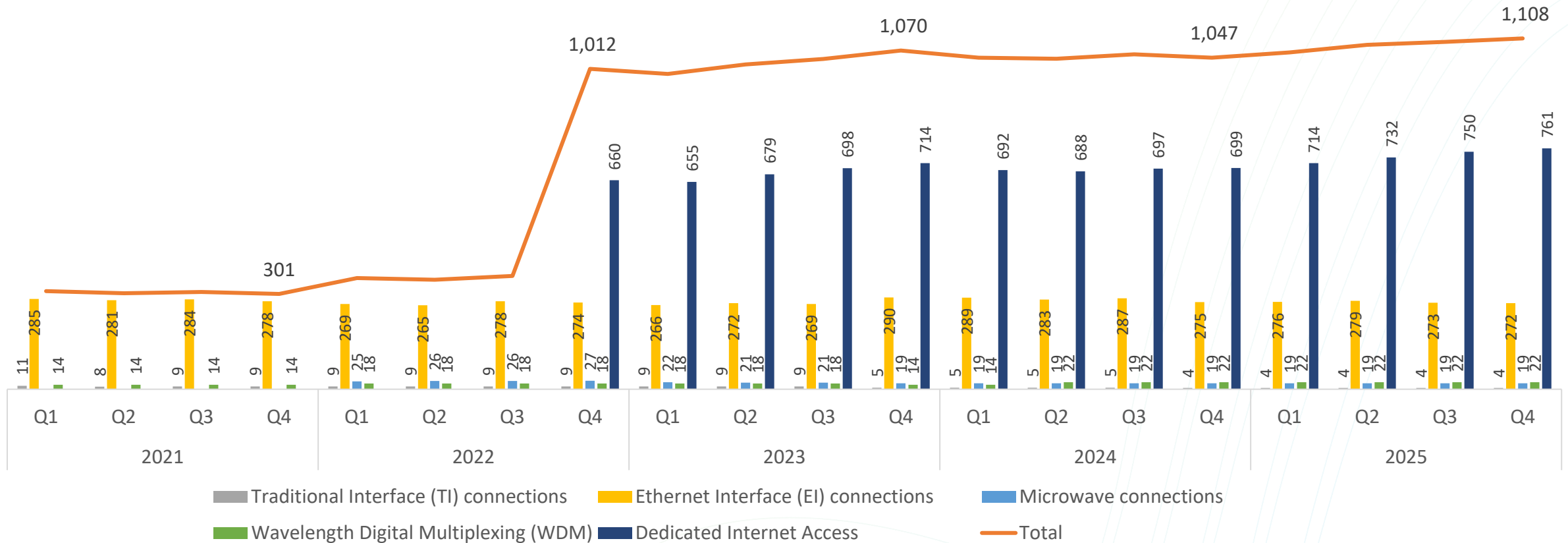


Diagram depicts trends for the average quarterly revenue per subscription on a bundle. The revenue element excludes installation and connection revenues. Readers should note that operators are left at their discretion to allocate their bundled revenues to each individual service in the bundle subscription.

Business high-end fixed connectivity



National connections as at end of period

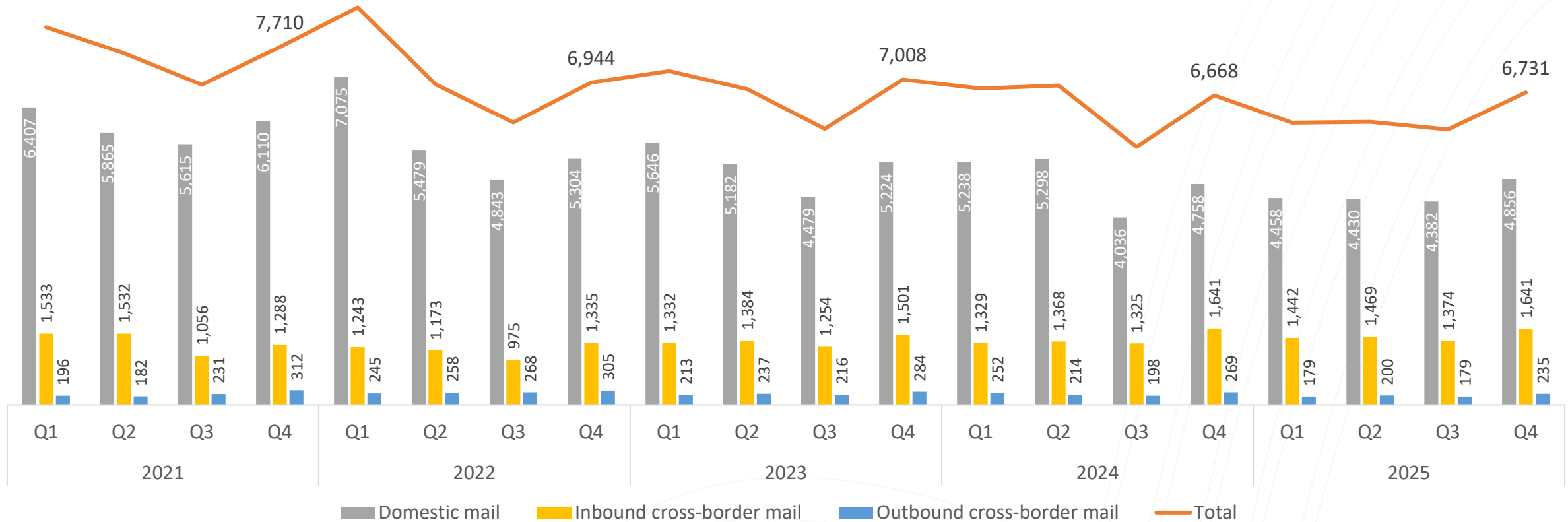


As from Q4 2022, the data includes Dedicated Internet Access (DIA) connections, alongside legacy business-grade subscriptions and subscriptions to Traditional Leased Lines, Ethernet Interface, Microwave and WDM.

Postal activity – mail volumes (1)



Postal volumes (000's)

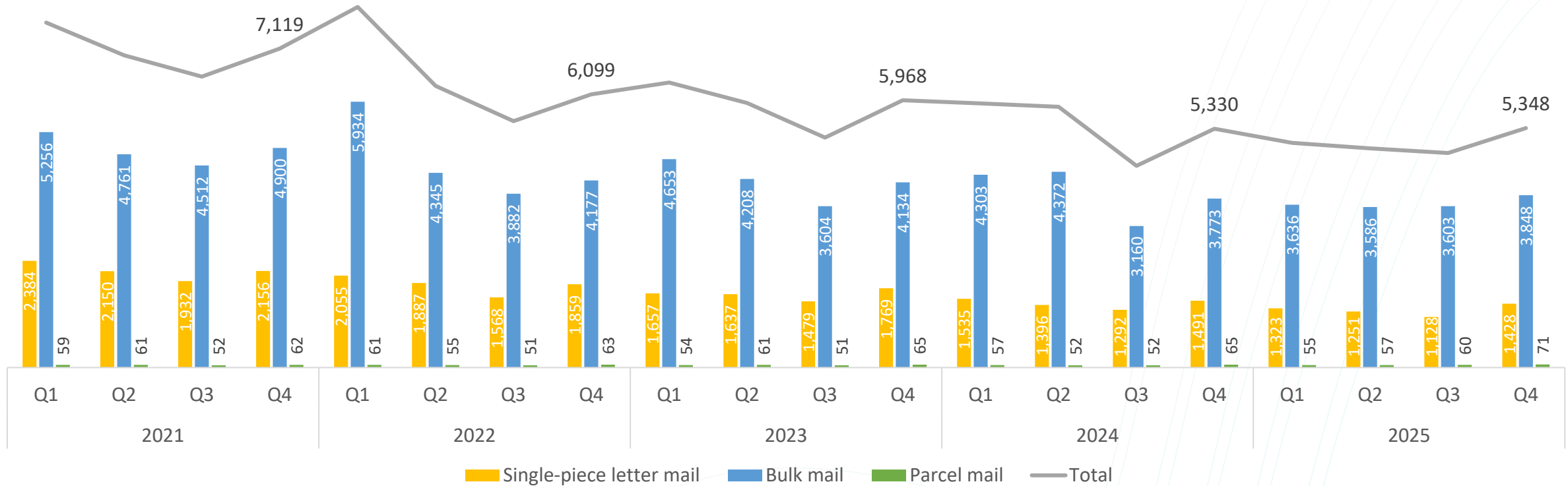


A break in series occurs in Q4 2025 due to changes in postal data mappings. As a result, data from Q4 2025 onwards are not directly comparable with earlier periods. Historical data have not been revised.

Postal activity – mail volumes (2)



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

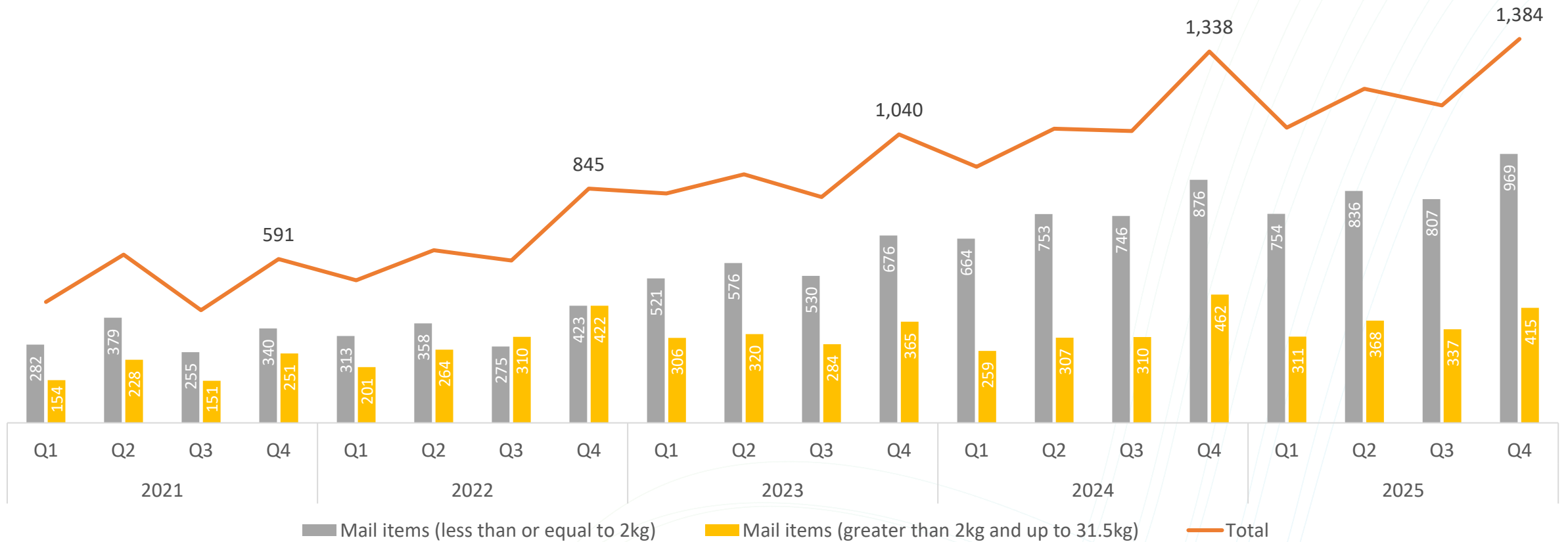


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Postal activity – mail volumes (2)



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



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