MALTA COMMUNICATIONS AUTHORITY

Market Developments for Electronic Communications and Post

A Review of Outcomes for Q4 2025

MCA publication reference: MCA/R/26-5928

29th April 2026

(+356) 2133 6840 info@mca.org.mt www.mca.org.mt
Valletta Waterfront, Pinto Wharf, Floriana FRN1913, Malta

Malta's telecommunications market in 2025 is characterised by steady growth in fixed-internet subscriptions, a mobile segment showing strong but stabilising growth, and evolving consumer preferences across services. The sector continues to support the country's digital agenda, with stronger fibre infrastructure and rising demand for high-speed fixed internet, data-driven communications.

Fixed internet

Fixed internet subscriptions increased by 1.8% in 2025, reaching 244,524 by the end of the year. This growth reflects households' and businesses' continued demand for higher-speed and reliable broadband connections.

GO completed nationwide fibre deployment by end-2025, positioning Malta as a dual-network market with island-wide FTTH and cable networks. Over the year, GO migrated 87.2% of its copper-DSL customers to fibre, reducing copper-based connections to just 1,019 by end of year. Ongoing fibre investments by Melita and Epic also contributed to a notable shift towards FTTH, which now accounts for nearly half (49.2%) of all fixed internet subscriptions, up from 43.8% in 2024.

By end 2025, 26.5% of fixed internet subscribers were on gigabit plans (64,901), up from 19.9% the previous year. Beyond gigabit tiers, operators also upgraded entry-level plans, with GO and Epic raising their standard entry-level download speeds from 100 Mbps to 300 Mbps in the first half of 2025, giving more users faster access at largely similar price points.

The average revenue per user (ARPU) rose from €267.36 in 2024 to €273.46, just five percentage points lower than the European average of €288[1]. This reflects wider adoption of higher-speed tier plans.

Mobile telephony

The mobile telephony segment remains an active and growing part of the market, with 803,118 subscriptions recorded in 2025 and a penetration rate of 136.5%. Growth reflects both population-driven demand, from both incoming residents and visitors, and the consolidation of the sector's role as a primary channel for everyday connectivity.

[1] European Telecommunications Network Operators' Association & Analysys Mason. (2024) State of Digital Communications 2024. Brussels: SIPOTRA. Available at: https://www.sipotra.it/wp-content/uploads/2024/09/STATE-OF-DIGITAL-COMMUNICATIONS-2024.pdf (Accessed: 2 April 2026).

More users shifted from basic, voice-centric plans to post-paid contracts that bundle unlimited or large-volume voice, SMS, and data. By the end of 2025, 57.4% of mobile subscribers were on post-paid plans, up from 53.3% in 2024.

Total domestic mobile data consumption reached 154.4 billion megabytes in 2025, an 11.4% increase on the previous year. At the same time, more traditional usage has continued to ease, with originating call volumes declining by 8.0%, originating minutes by 6.0%, and SMS messages sent by 15.1% to 101.8 million.

Average revenue per mobile telephony user declined from €157.36 in 2024 to €144.51 in 2025, a figure that lies below the European average of €186.

Pay-TV

Pay-TV subscriptions grew by 3.5% in 2025, reaching 201,147 households. This growth is driven by flexible, app-based and on-demand viewing options, rather than traditional linear TV. Average revenue per TV subscriber declined slightly from €170.59 to €169.10.

Fixed telephony

Fixed telephony remains the electronic communications services (ECS) segment with the weakest growth profile. The number of fixed-line subscribers edged up by just 0.2% in 2025, reflecting a broadly stable but subdued demand. As in previous years, both originating calls (-10.7%) and originating minutes (-14.6%) continued to decline. Nevertheless, each fixed-line call remains longer on average than a mobile call, with fixed-line calls averaging 3 minutes and 36 seconds versus 2 minutes and 24 seconds for mobile calls. ARPU for fixed telephony declined by 5.6%, from €98.35 in 2024 to €92.85 in 2025.

Bundles

Bundling remains the dominant way consumers in Malta access electronic communications services, reflecting a mix of operator-driven promotion and actual user preferences. In 2025, 90.9% of internet subscribers took their connection as part of a bundle, slightly up from 90.3% in 2024, followed by 89.0% of fixed telephony subscribers and 82.6% of Pay-TV consumers. Mobile telephony is still largely sold as a stand-alone service, with only 0.2% of subscribers on bundled offers.

Triple-play bundles (internet + fixed telephony + TV) accounted for 70.8% of all bundled subscriptions, up from 69.9% in 2024. Overall, average revenue per bundled subscriber remained relatively stable at €101.79, with dual-play ARPU rising by 4.2% to €346.47 and triple-play ARPU dipping slightly from €434.10 to €429.73, reflecting operators' internal revenue-apportionment practices.

High-quality dedicated connections

For business users, high-end connectivity is also on the rise. In 2025, the number of enterprises on premium, high-speed connectivity plans increased from 1,047 to 1,108 (a 5.8% rise). National connections still dominate this segment (97.3%), with 70.6% delivered via dedicated internet access, up from 68.6% in 2024. Most national connections operate in the 100–500 Mbps range (36.9%), while gigabit speeds are more common among international-facing connections (36.8%), albeit on a much smaller subscriber base.

Post[2]

A total of 24.8 million mail items were circulated across the Maltese islands in 2025. Of these, 80.7% handled within the scope of the universal service, while the remaining 19.3% were handled outside its scope.

Almost three-quarters of all mail items sent within the scope of the universal service originated as bulk mail, now also including the distribution of newspaper post. The majority (88.4%) of all mail items within the scope of the universal service were delivered locally.

Mail items outside the scope of the universal service consisted predominantly of inbound cross-border mail, accounting for 87.9% of the total. This was largely driven by the growth in parcel mail, primarily associated with e-commerce activity. Similar trends have been observed in previous reports, reflecting the continued impact of digital substitution.

Notes

(i) Data cut-off date: 2nd April 2026.

(ii) Data is preliminary and subject to change.

[2] A break in the data 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.

MALTA COMMUNICATIONS AUTHORITY

(+356) 2133 6840
info@mca.org.mt
www.mca.org.mt
Valletta Waterfront, Pinto Wharf,
Floriana FRN1913, Malta