

MCA Market Trends - Q1 2021 to Q2 2025

Figures based on the Data Report Sheet (DRS) publication

MCA publication reference: MCA/R/25-5744



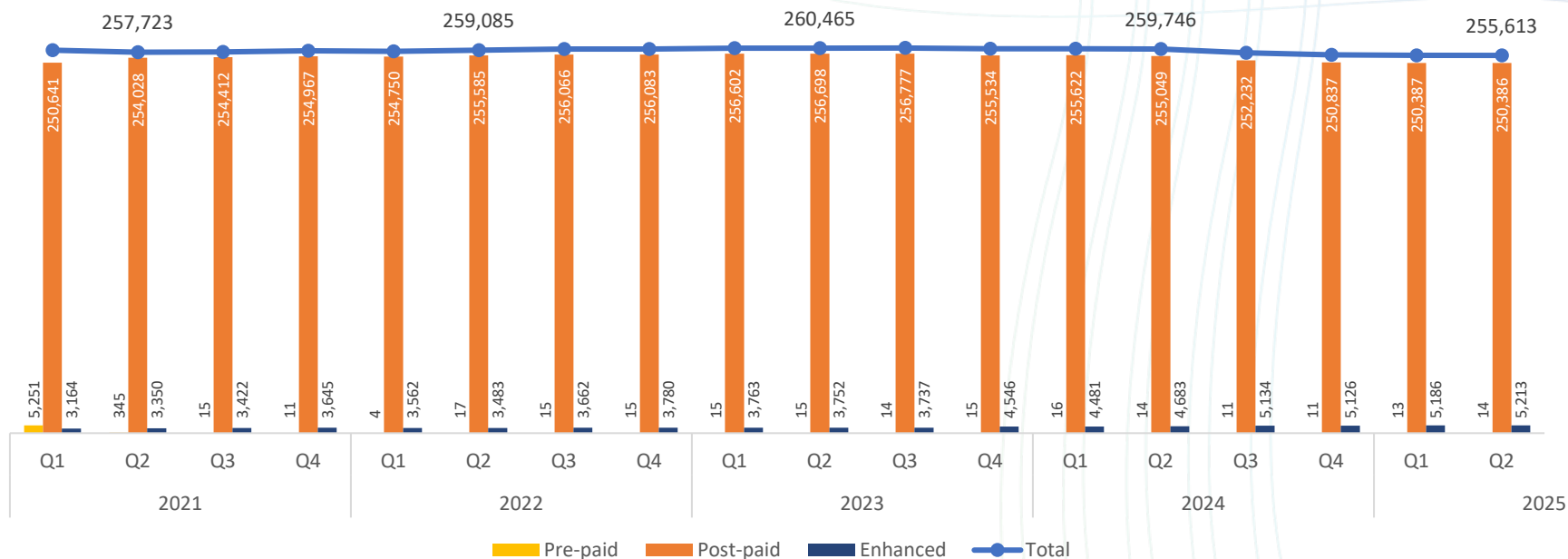
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Purpose

- 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 connectivity services;
 - Mail volumes for the postal sector.
- Data freeze carried out on 18th September 2025.

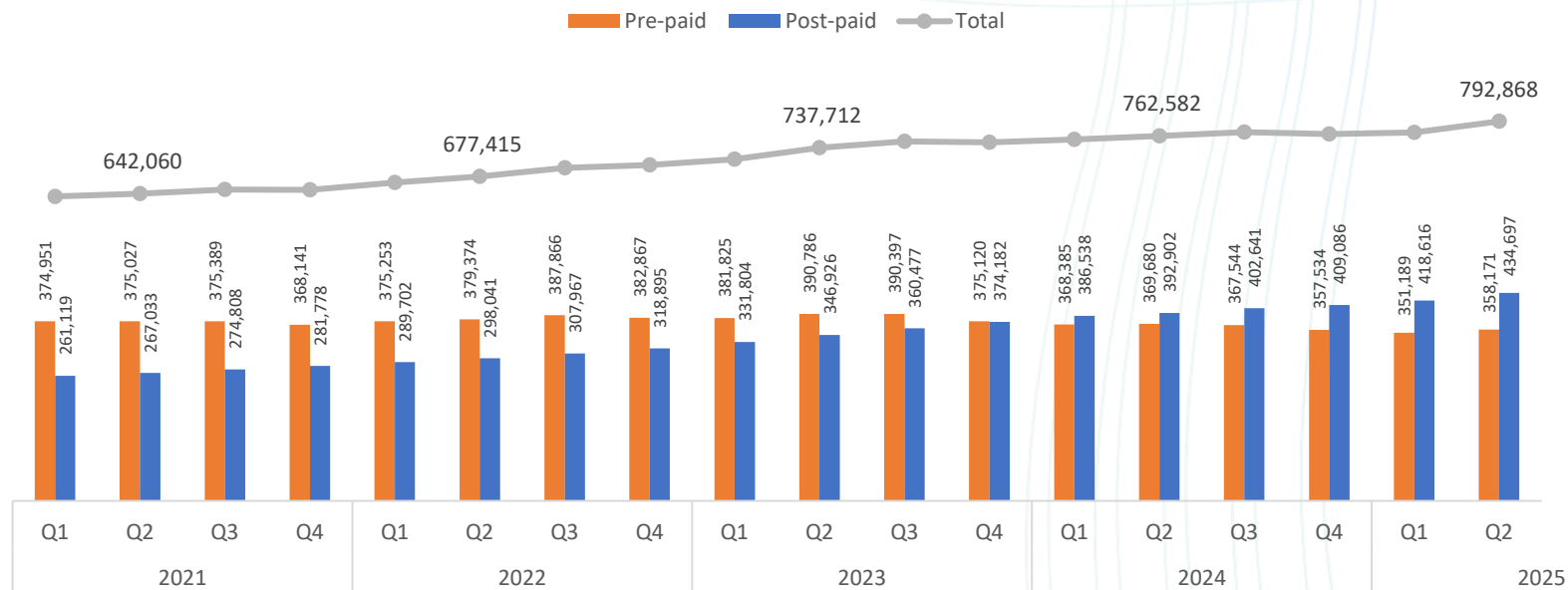
Fixed telephony

Subscriptions as at end of period



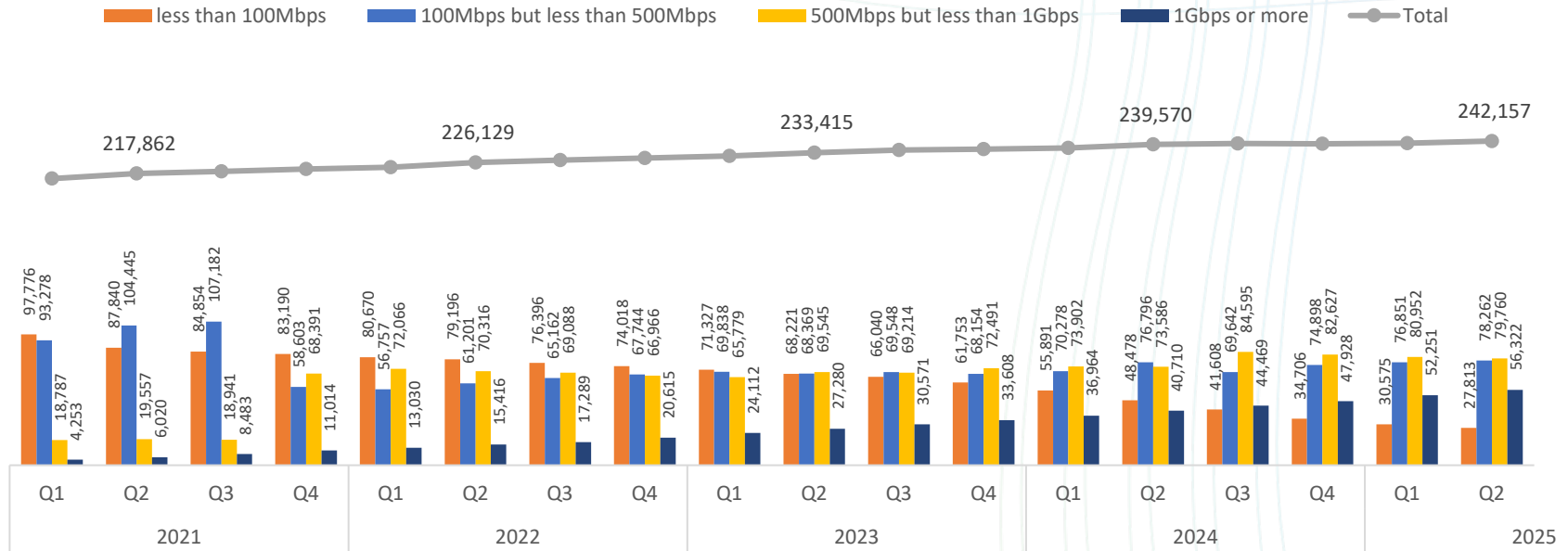
Mobile telephony

Subscriptions as at end of period



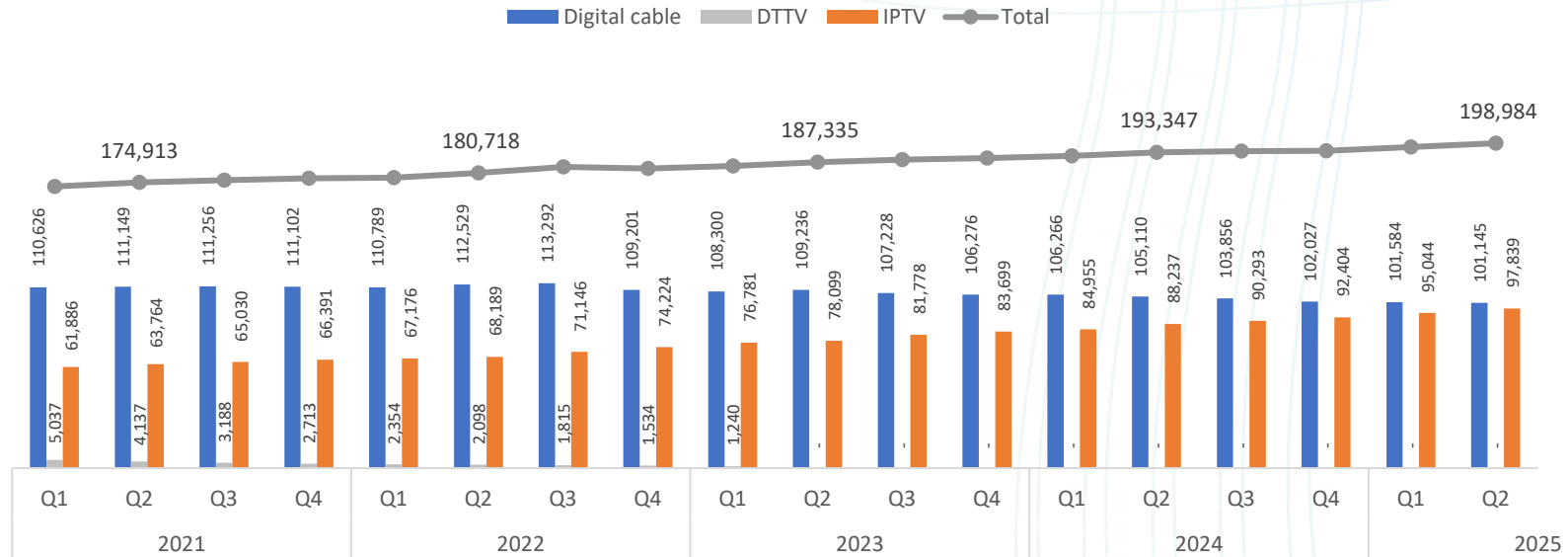
Fixed broadband

Subscriptions as at end of period

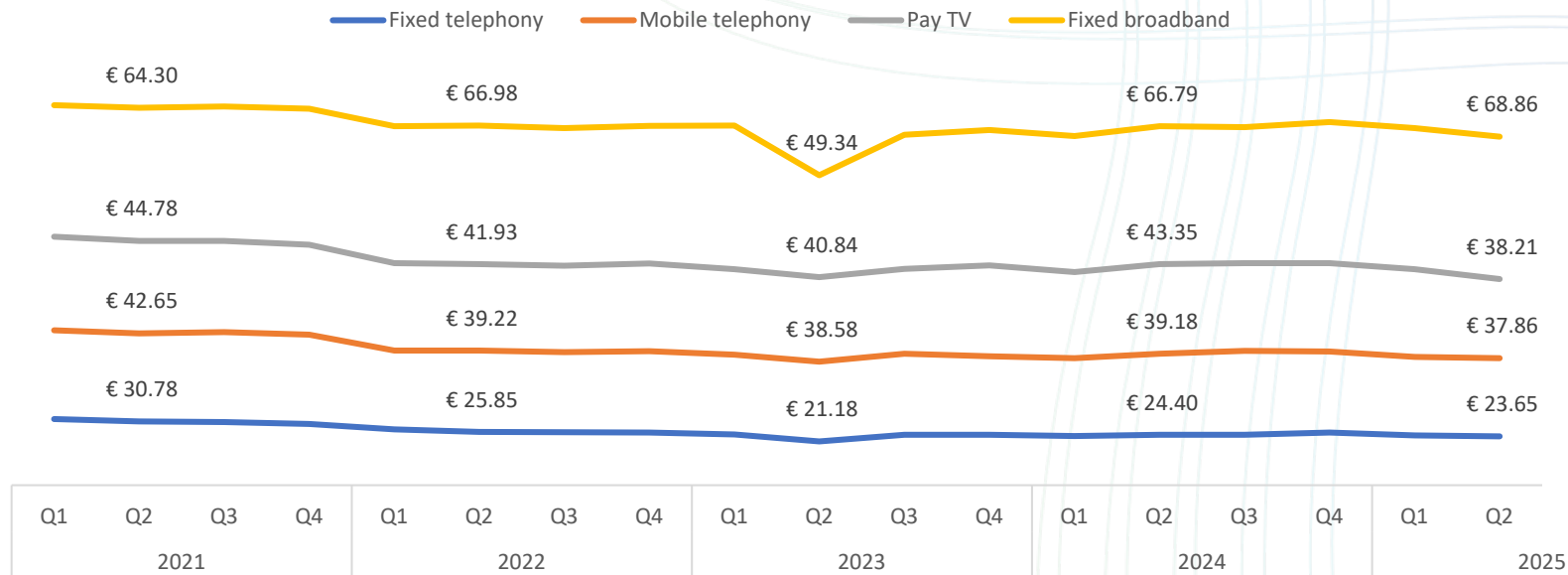


Pay-TV

Subscriptions as at end of period

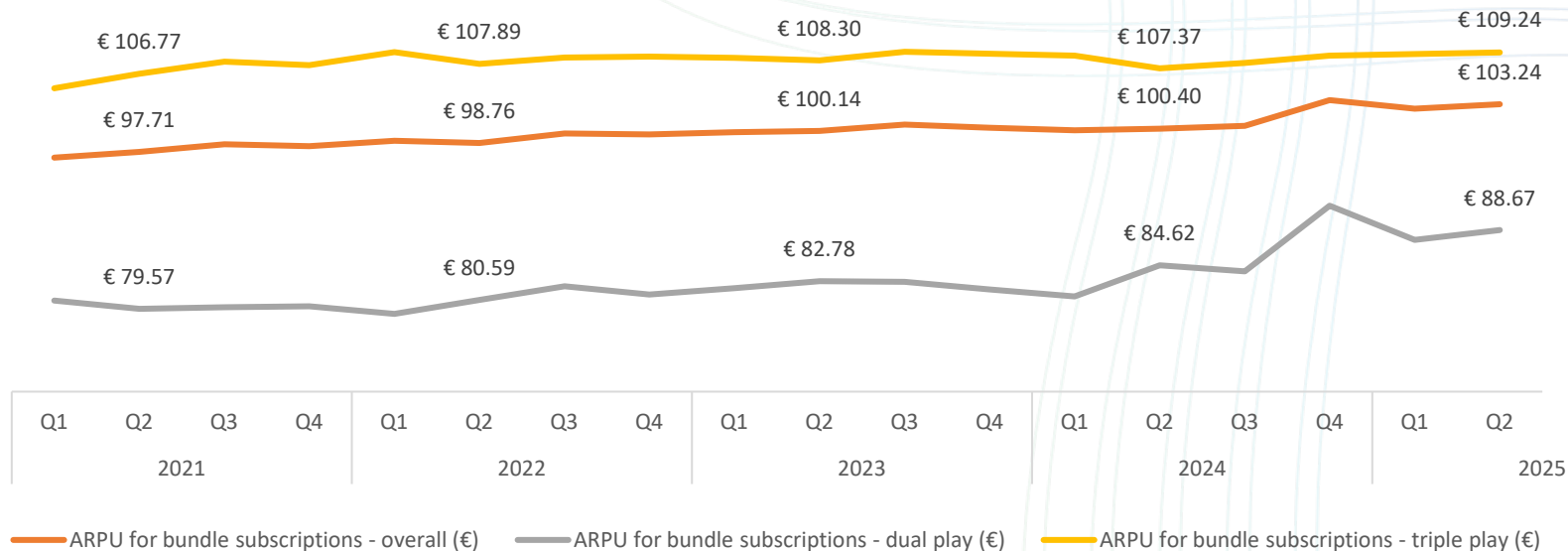


Average revenue per user (ARPU, €)



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.

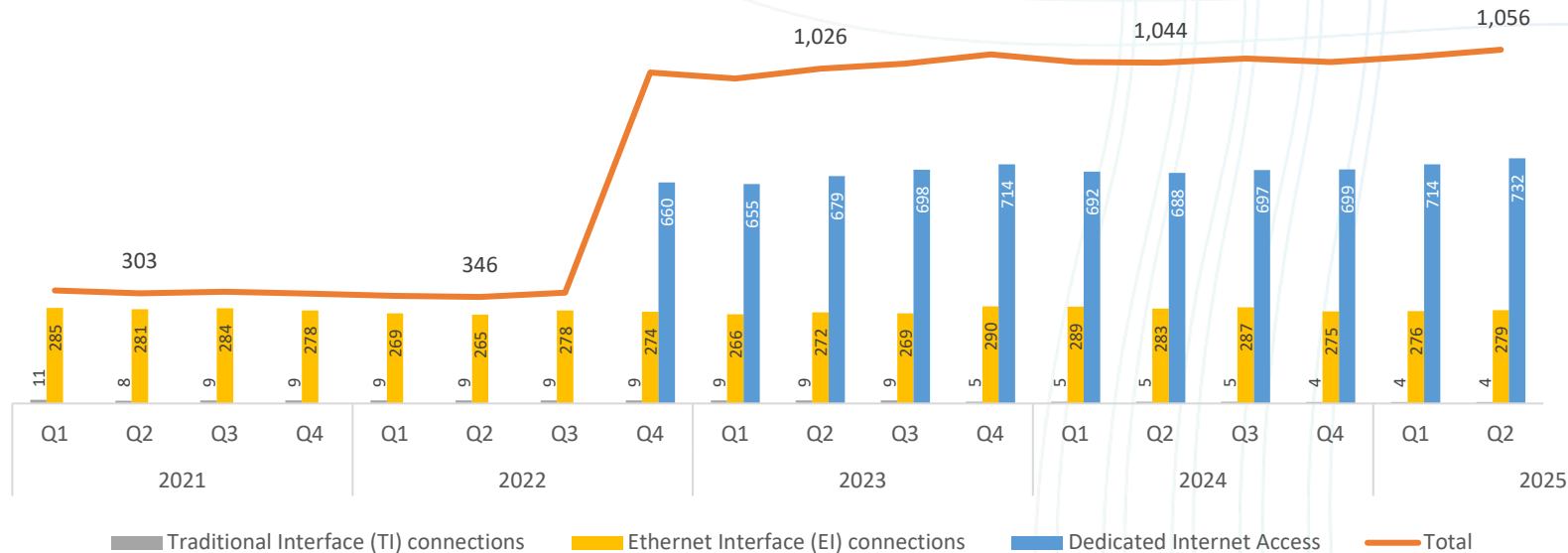
Bundle ARPU (€)



This indicator captures the average quarterly revenue per subscription reported by local service providers for bundle service. The revenue element for each bundle excludes installation and connection revenues. Readers should note that operators are left at their discretion to allocate their bundled revenues to individual services.

High-end connectivity

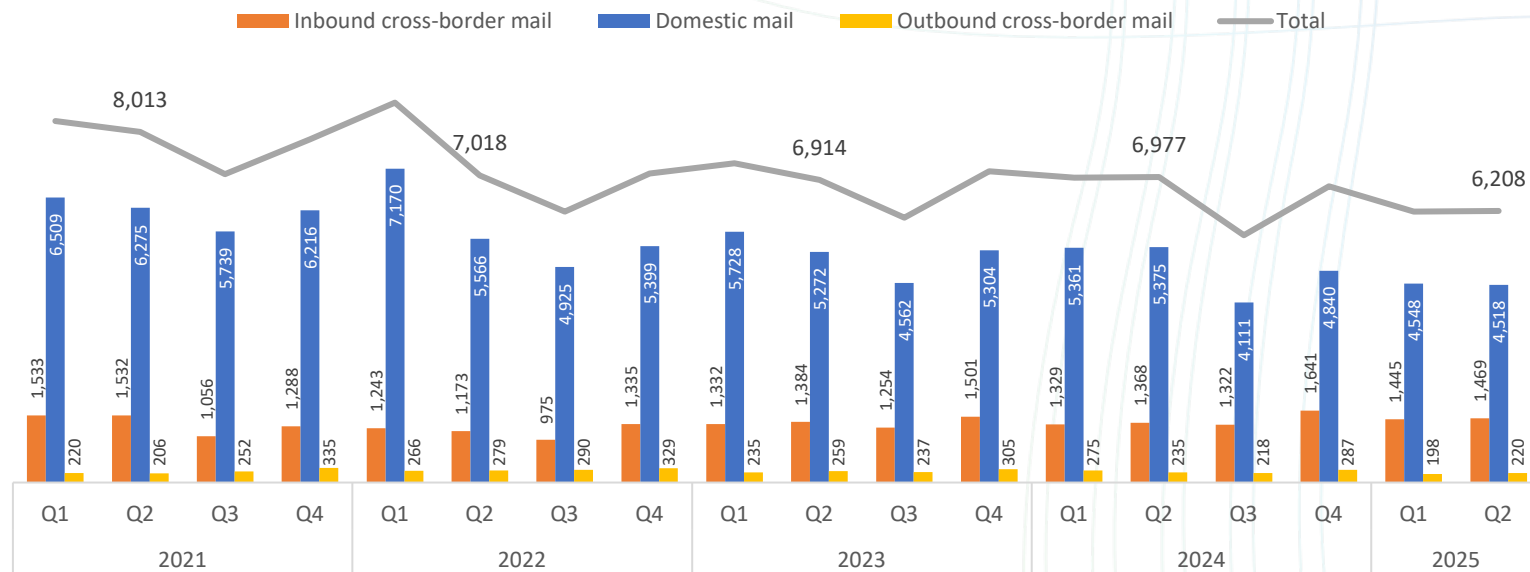
National retail connections as at end of period



As from Q4 2022, the data includes Dedicated Internet Access (DIA) connections, alongside traditional leased line segments and other legacy business-grade services.

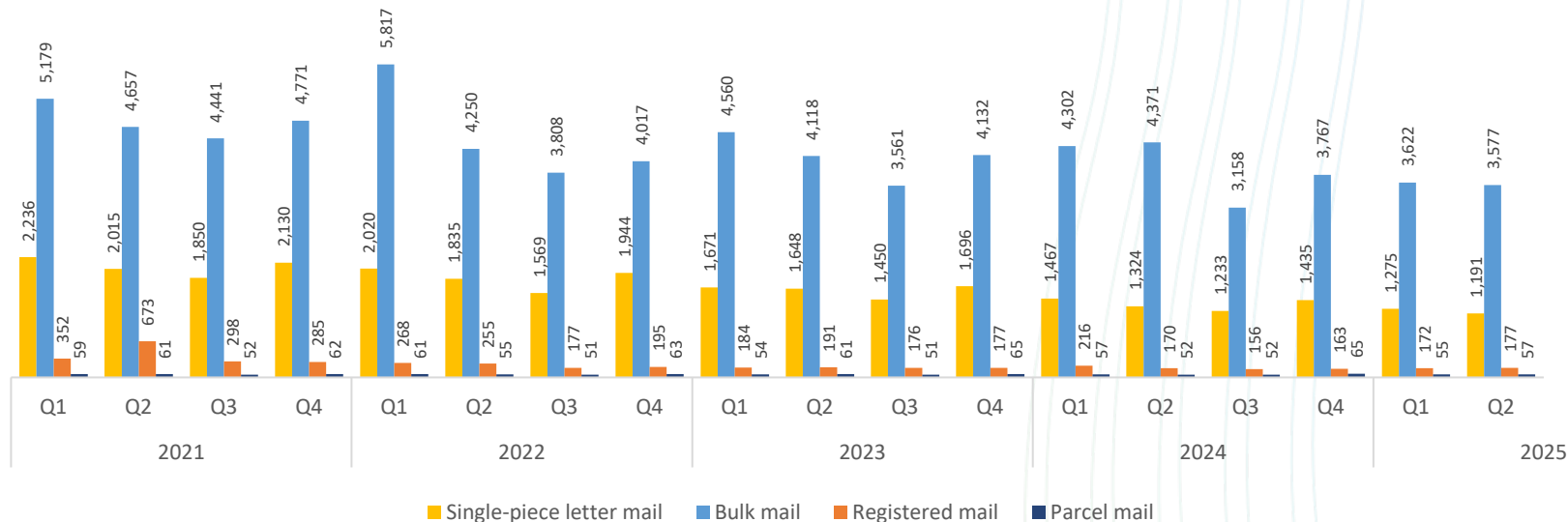
Post – mail volumes (1)

Postal mail volumes (in 000's)



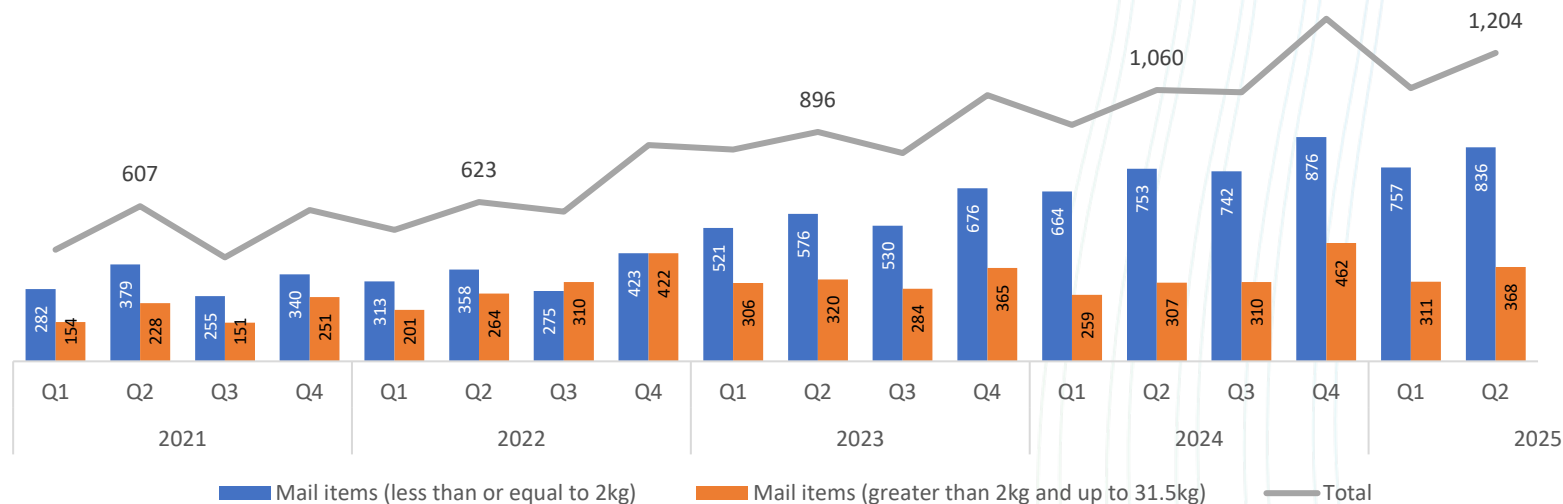
Post – mail volumes (2)

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



Post – mail volumes (3)

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



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