



Figure 16 – Prepaid and postpaid customer shares, Q32006-Q42008

Mobile Networks Volumes

The minutes charged in Croatian mobile networks have been growing with CAGR of 24,4% since 2003 (Table 33). The stronger growth was experienced in 2006 (46,3%) upon entrance of the third mobile operator in the market. A decrease in the annual traffic growth rates during 2007 and 2008 came as the market has been approaching the saturation phase. The majority of the traffic is charged on domestic calls (95-98%).

Table 33 – Mobile networks traffic volumes, 2003-2008

	2003	2004	2005	2006	2007	2008
Minutes charged in mobile networks (millions)	1.913	2.198	2.812	4.115	4.985	5.704
Annual growth rate	27,7%	14,9%	27,9%	46,3%	21,1%	14,4%
Domestic minutes charged in mobile networks (millions)	1.822	2.102	2.706	3.987	4.888	5.592
Annual growth rate	27,1%	15,4%	28,7%	47,3%	22,6%	14,4%
International outgoing minutes charged in mobile networks (millions)	91	96	106	128	97	112
Annual growth rate	40,0%	5,5%	10,4%	20,8%	-24,2%	15,5%

Source: Lator based on HAKOM data.

SMS volumes have grown with CAGR of 13,1% since 2003, with significant growth achieved during 2008 (Table 34). Also, MMS volumes have strongly increased since the introduction of this service in the market in 2003, with the high growth of absolute MMS volumes in 2008 as well.

Table 34 – SMS and MMS volumes, 2003-2008

	2003	2004	2005	2006	2007	2008
SMS (millions)	2.026	2.243	2.429	2.554	2.724	3.745
Annual growth rate	21,9%	10,7%	6,4%	5,1%	6,7%	37,5%
MMS (millions)	-	3	10	15	22	43
Annual growth rate	-	-	235,8%	43,2%	45,2%	99,8%

Source: Lator based on HAKOM data.