

Quarterly Market Indicators

Q4 2020

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Main Market Indicators for Q4 2020



Mobile subscribers:
1,748,672

Penetration:
119%

Average Int. & Domestic minutes per **month** per mobile subscription:
245

Average data usage per mobile broadband subscription*:
12.8 GB



Mobile Prepaid subscribers:
1,194,013

% of Prepaid of Mobile Market:
68%



Mobile Postpaid subscribers:
554,659

% of Postpaid of Mobile Market:
32%



Fixed-telephony subscribers:
220,435

Penetration:
15%

Domestic **monthly** average minutes per line:
50



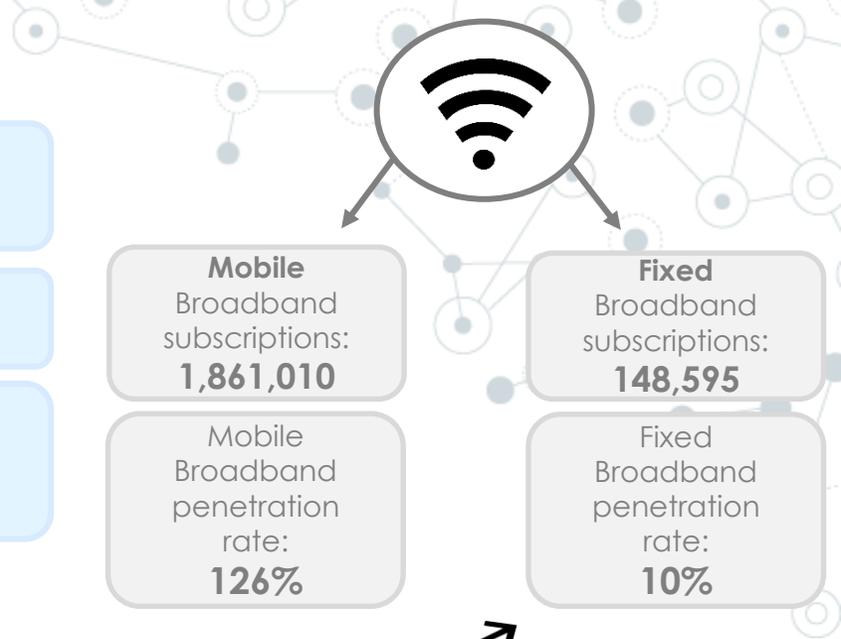
Fixed Wired Telephony subscribers:
92%

Fixed Wireless Telephony subscribers:
8%



International Outgoing Minutes (Mobile):
284,619,123

International Outgoing Minutes (Fixed telephony):
956,855



Total Data Usage:
299 Petabyte

Avg. Traffic per broadband subscription per month:
50 GB

Fixed Broadband Traffic:
156 Petabyte

Avg. Fixed Broadband Traffic per month:
351 GB

Mobile Broadband Traffic**:
142 Petabyte

Avg. Mobile Broadband Traffic per month:
26 GB

*Average data usage per mobile broadband subscription excludes Standalone subscribers' traffic

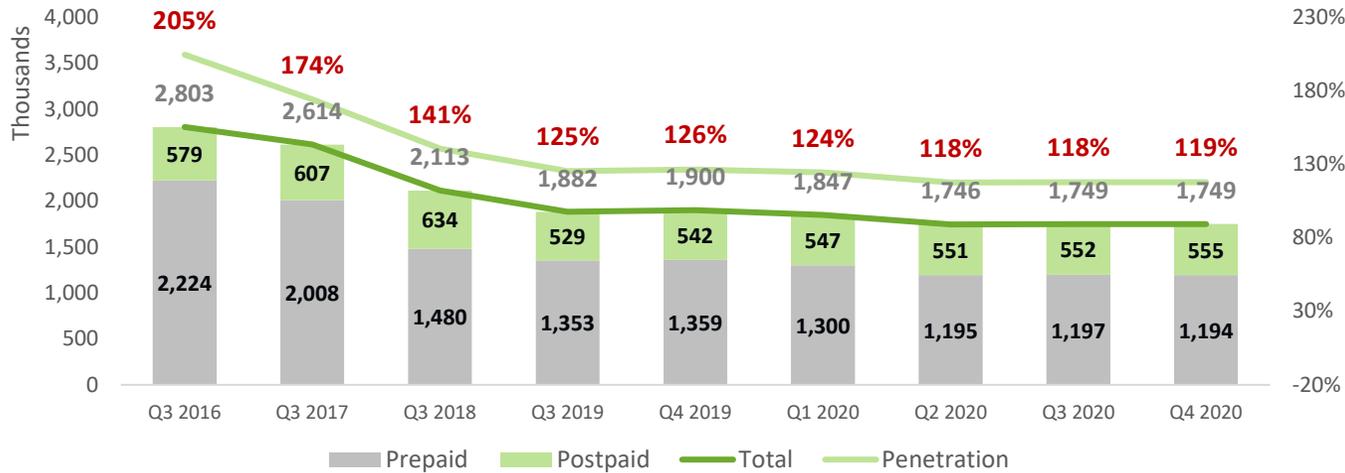
** Includes Broadband added to voice & Standalone mobile broadband

Mobile services: Subscriptions

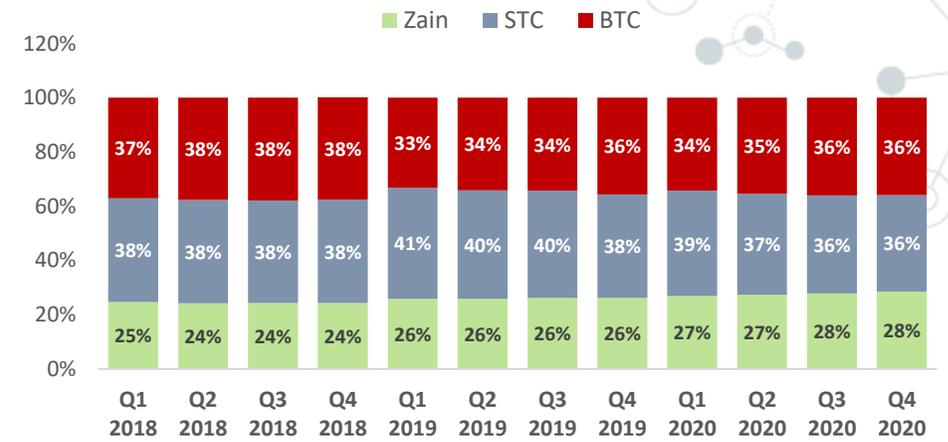


Number of Mobile subscriptions (End of Q4 2020)
1,748,672 Subscriptions
 119% Penetration rate

Number of mobile subscriptions & penetration



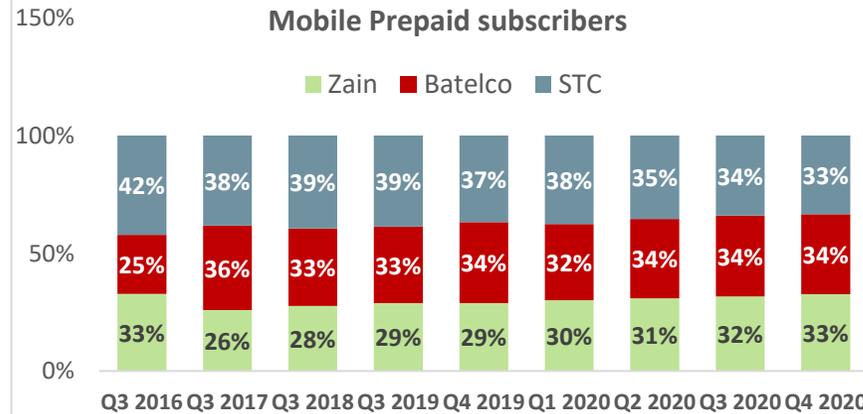
Total Mobile Market share



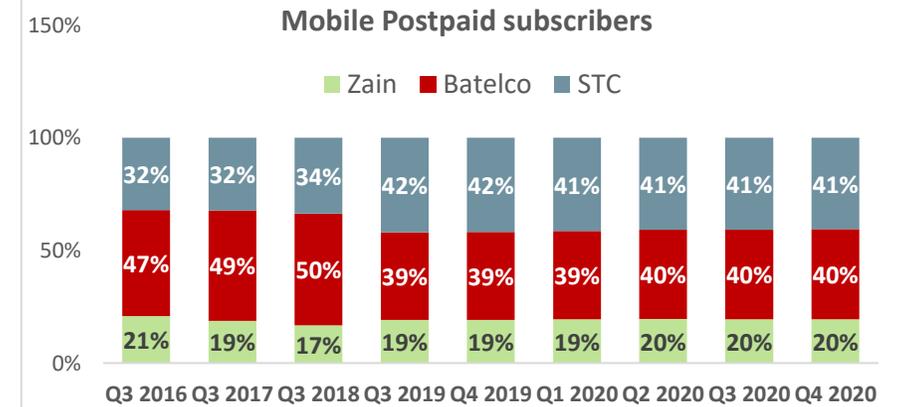
Number of Accepted Mobile Porting Requests



Mobile Prepaid subscribers



Mobile Postpaid subscribers



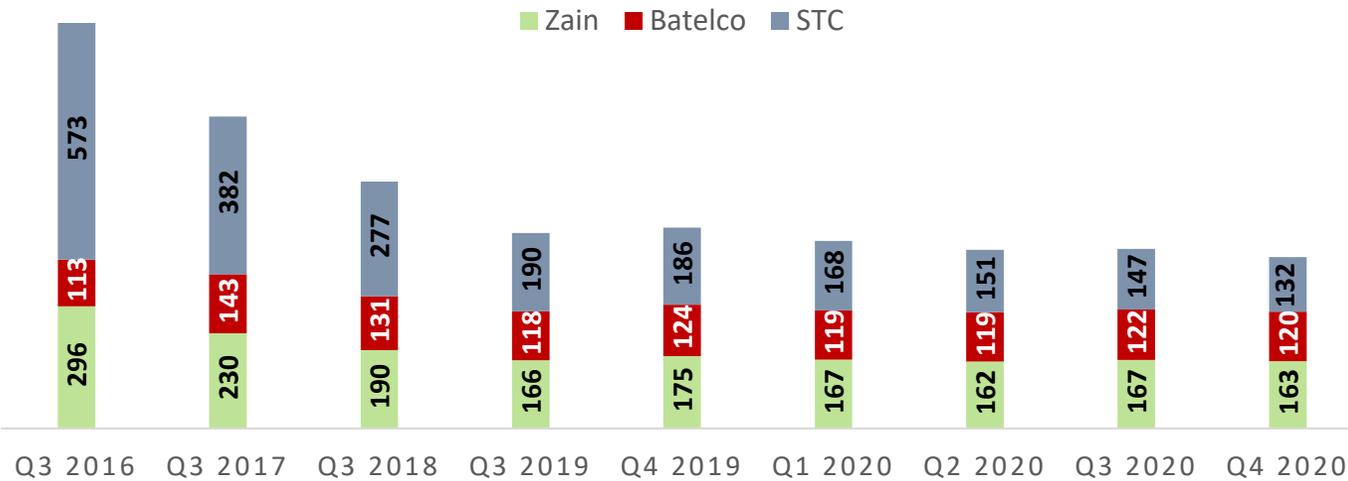
Population	2016	2017	2018	2019	2020
By IGA	1,423,726	1,501,116	1,503,091	1,484,756	1,472,204

Mobile services: Traffic (Minutes)



**Total Outgoing Traffic in Minutes
(Domestic + International)***

Total Domestic Prepaid Outgoing Mobile Traffic in Million



Q4 2019

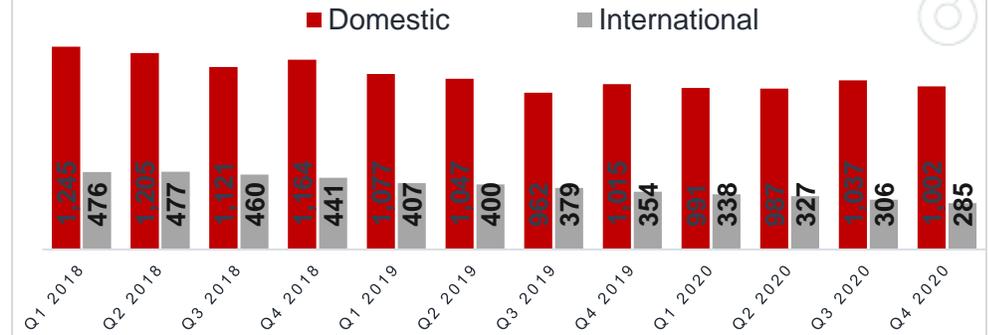
1,369,609,111

Q4 2020

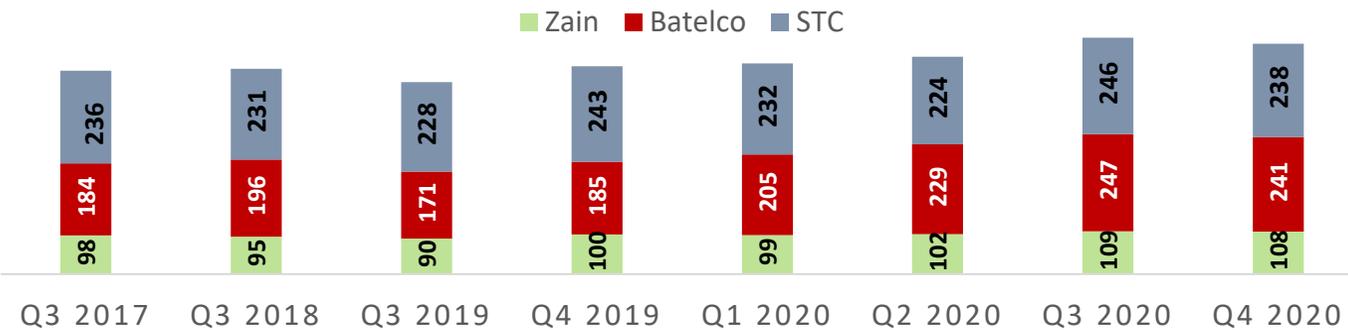
1,286,268,934

▼
6%

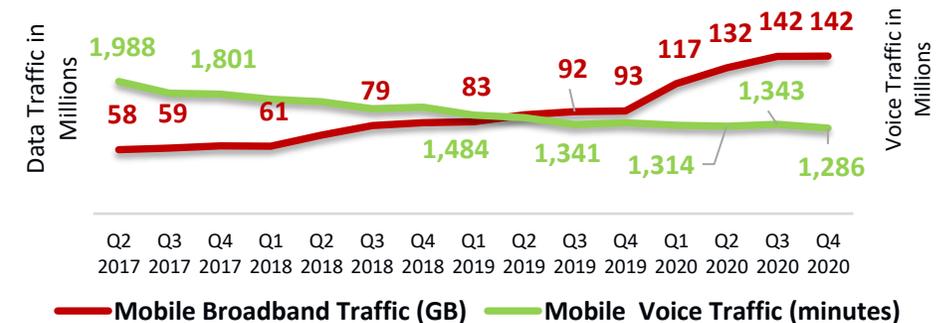
**Total Outgoing Mobile Voice Traffic in Millions of Minutes
(Domestic-International)**



Total Domestic Postpaid Outgoing Mobile Traffic in Million



Mobile Voice Traffic Vs Mobile Broadband Data Traffic



* Revised for 2019 data

Mobile Revenues

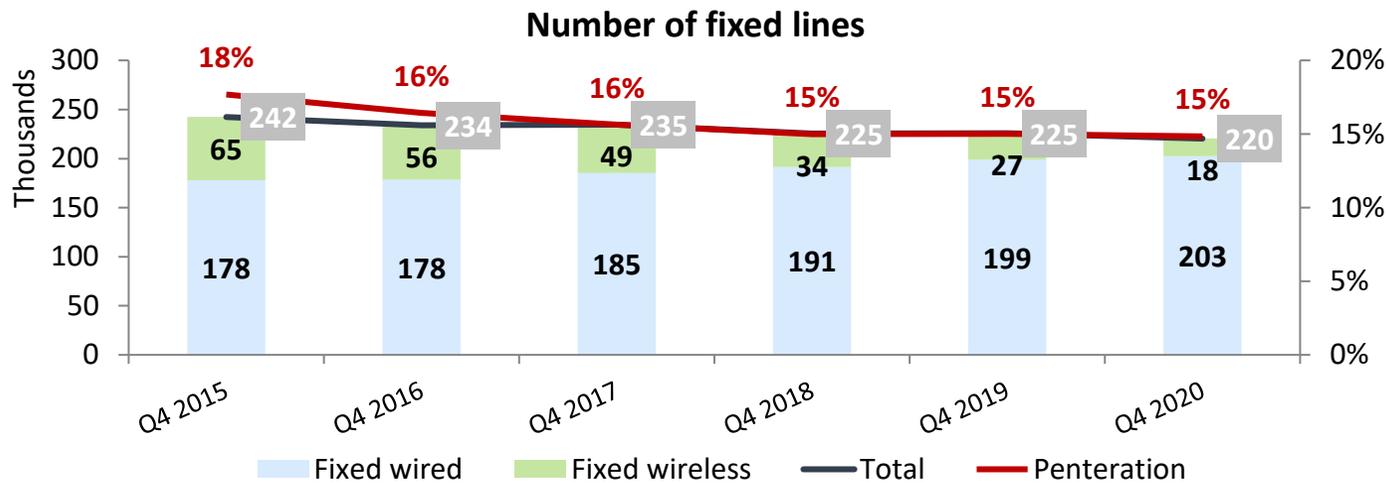
(BHD)	Q1 2020			Q2 2020			Q3 2020		
	Batelco	Zain	STC	Batelco	Zain	STC	Batelco	Zain	STC
Mobile Prepaid revenue	4,641,541	5,468,162	6,373,341	4,604,244	5,190,684	5,623,458	4,398,890	5,199,841	5,272,131
Mobile Postpaid revenue	11,541,579	3,994,480	8,466,622	10,361,932	3,476,227	8,230,544	10,589,852	3,610,730	8,233,576

**In reporting these numbers, the TRA has relied exclusively on the submissions received from the licensed operators. TRA has not independently verified the accuracy of these figures and that therefore TRA assumes no responsibility for the same. No reliance should be placed on the accuracy of these figures.*

Fixed telephony services: Subscriptions (PSTN & Wireless)



No. of fixed telephony subscriptions

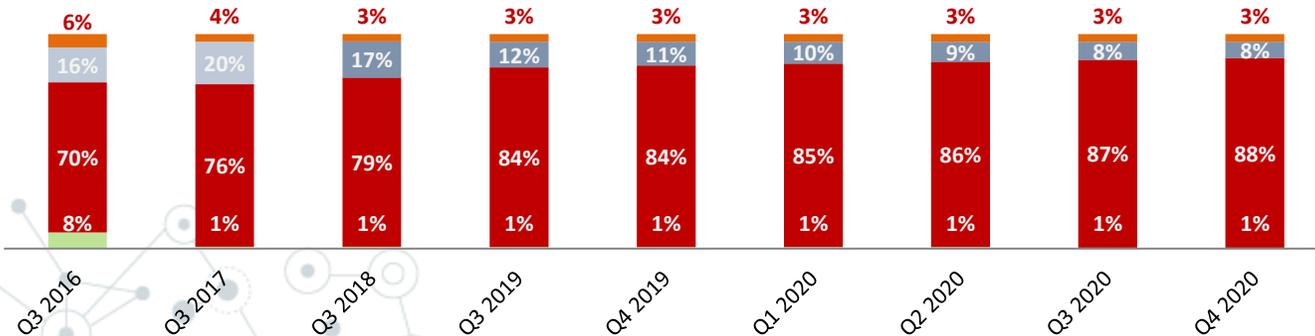


	End of Q4 2019	End of Q4 2020
Total	224,962	220,435
Penetration rate	15%	15%

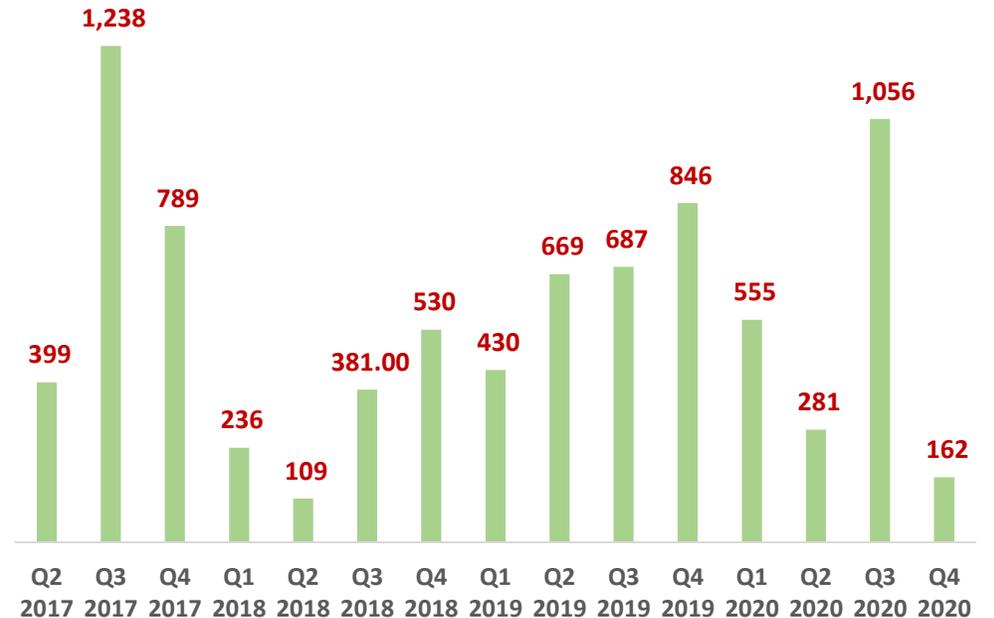
	2017	2018	2019	Q4 2020
Total	234,709	225,479	224,962	220,435
% of Fixed Wired	79%	85%	88%	92%
% of Fixed Wireless	21%	15%	12%	8%

Fixed telephone lines market share

Zain Batelco STC Mena Other



Number of Accepted Fixed Line Porting Requests

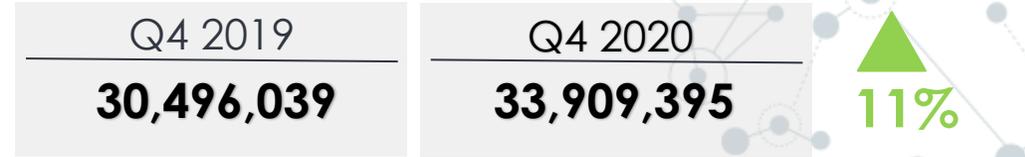
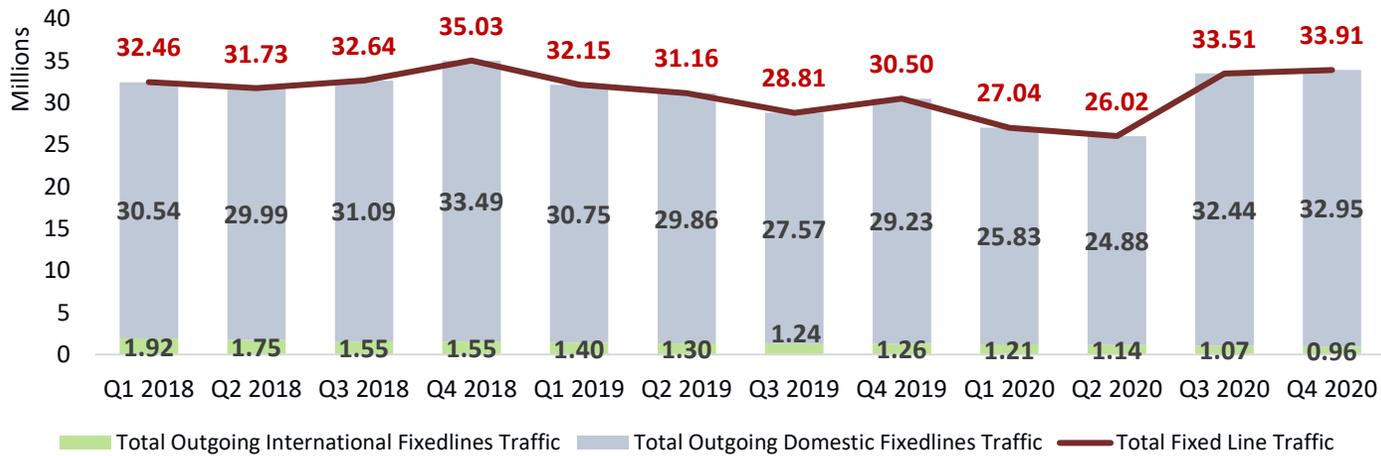


Fixed telephony services: Traffic (PSTN & Wireless - Minutes)

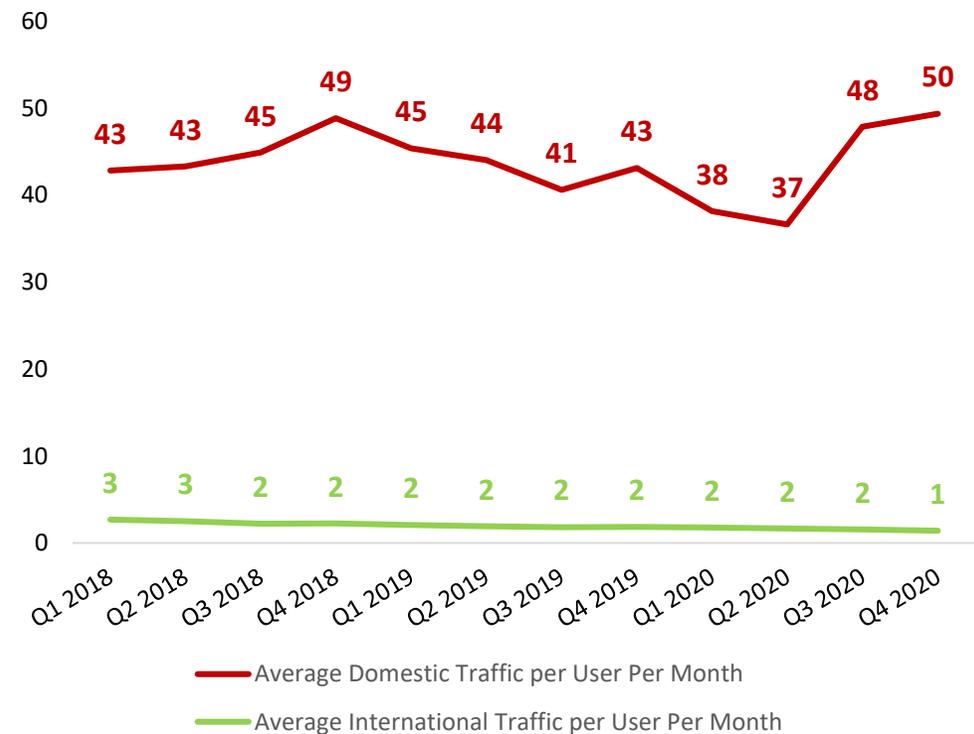


Total fixed domestic outgoing traffic in minutes**

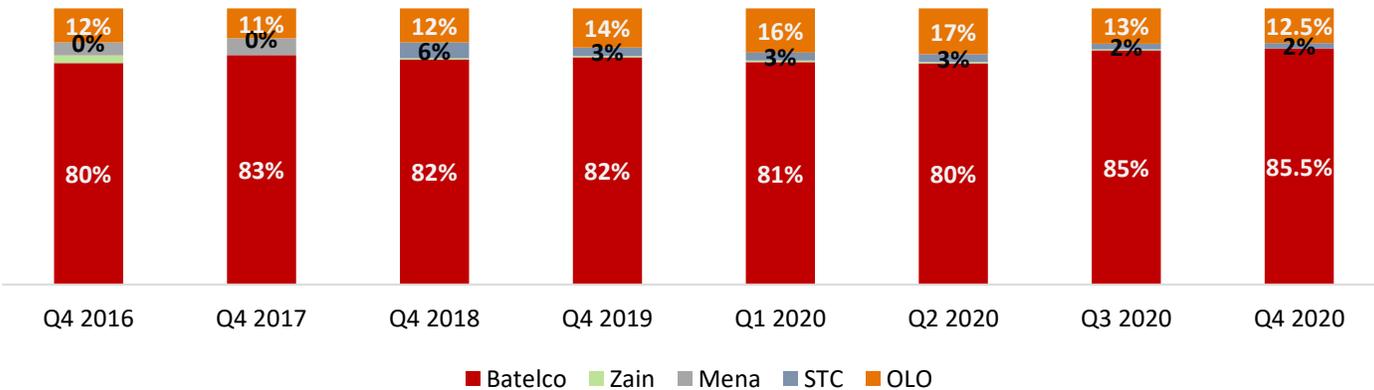
Fixed Line Domestic & International Outgoing Traffic (Minutes)



Monthly Average Outgoing Domestic & International Minutes Per Subscription



Fixed Domestic Traffic Market Share



* International Outgoing Minutes originated from ISDN traffic is not included in the chart above

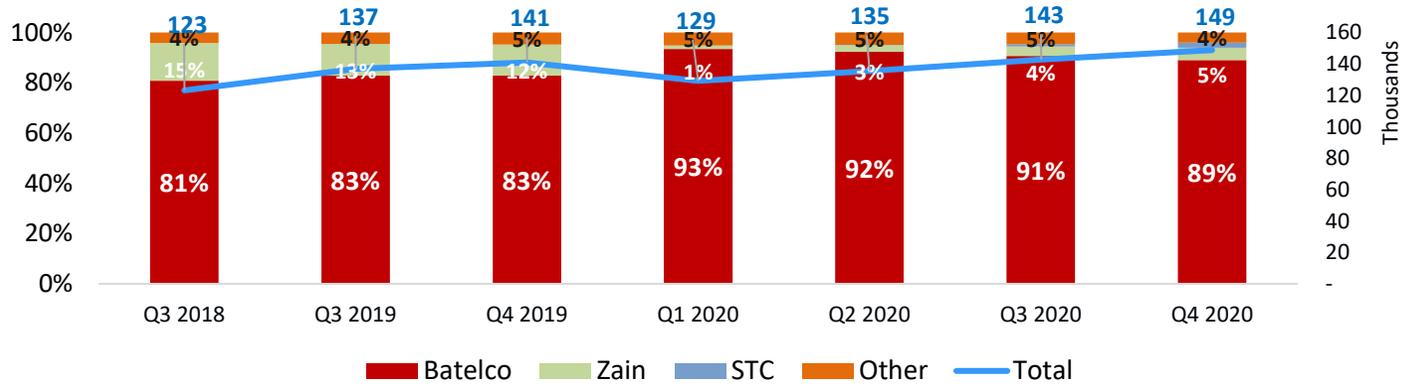
** Revised for 2019 data

Broadband services: Subscriptions**

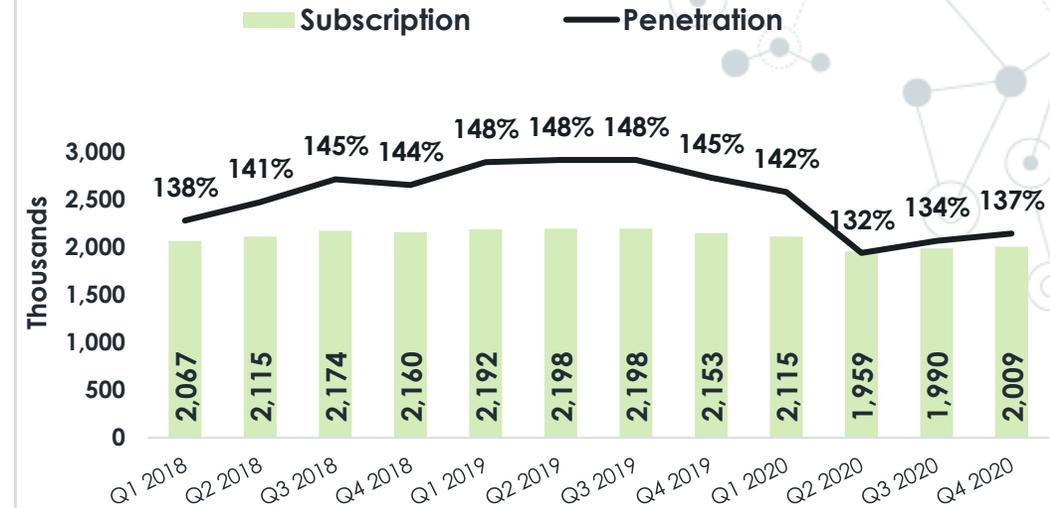


No. of broadband subscriptions (End of Q4 2020)*
2,009,605
 137% Penetration rate

Fixed Broadband Subscriptions Market Share

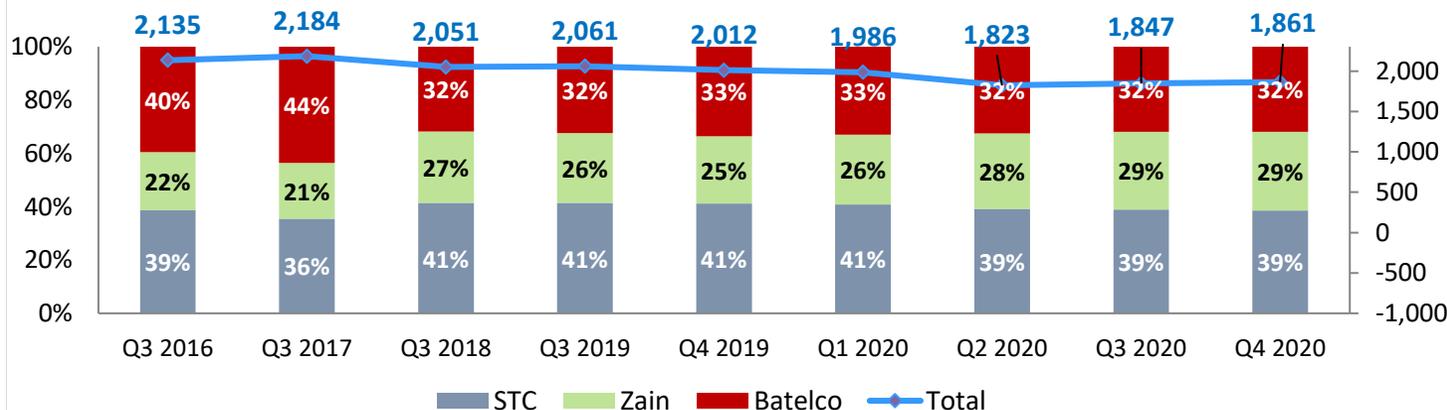


Broadband Subscriptions and Penetration



*Fixed Broadband includes Fixed wired and Fixed wireless

Mobile broadband subscriptions market shares (Pay-per-use + Add-on to voice + Standalone)



Mobile Broadband – Q4 2020



Proportion of broadband subscriptions by access type – Q4 2020



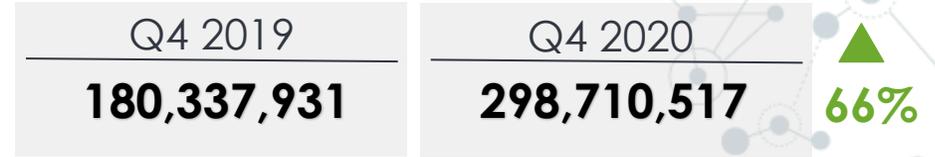
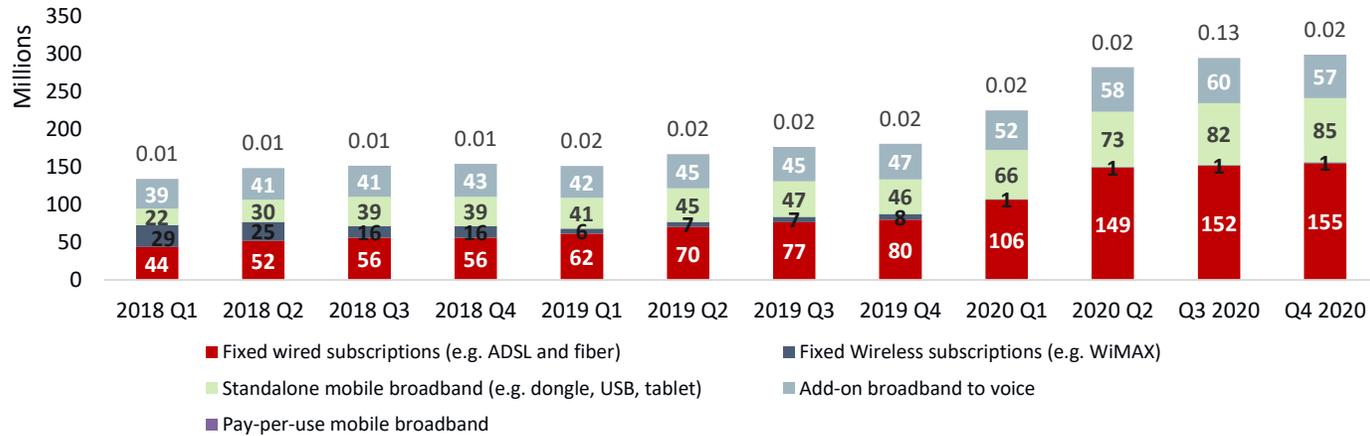
** Standalone numbers have been revised from Q3 2019 as M2M subscribers have been removed from the total number.

Broadband services: Data Traffic 1 of 2*

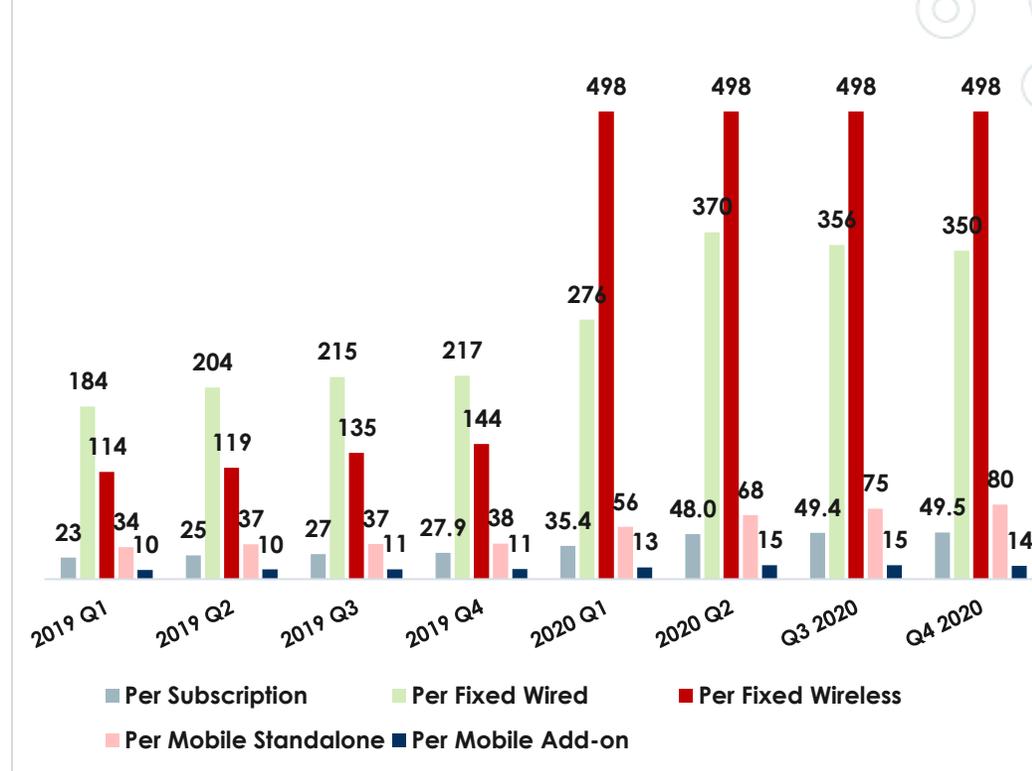


Total data traffic in Gigabyte

Traffic per technology*

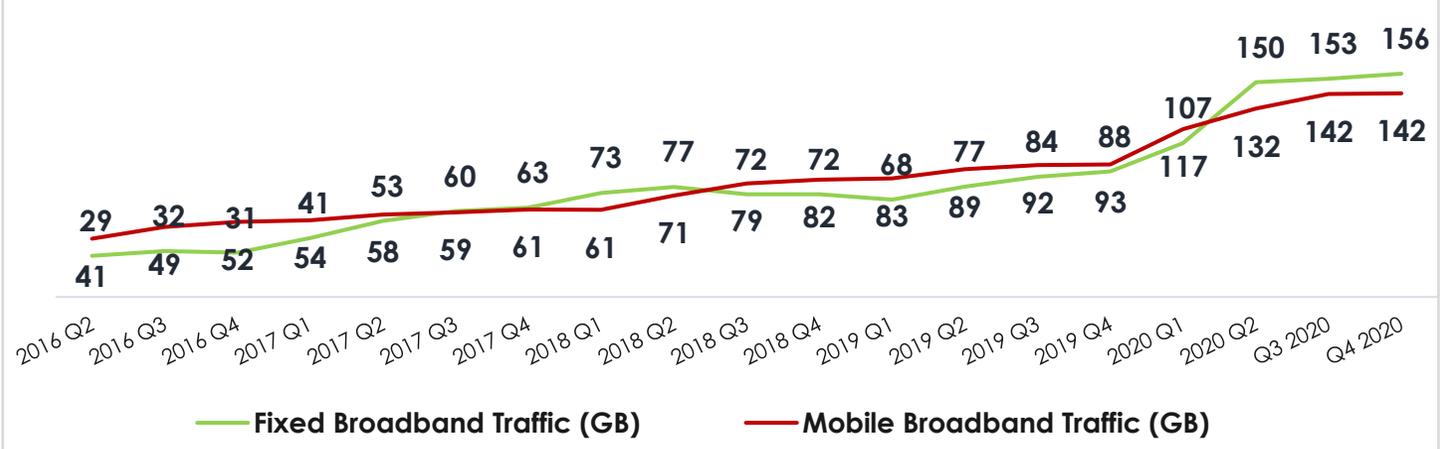


Monthly Average data consumption per subscription (Gigabyte)*



*Fixed wired data traffic was revised from June 2018

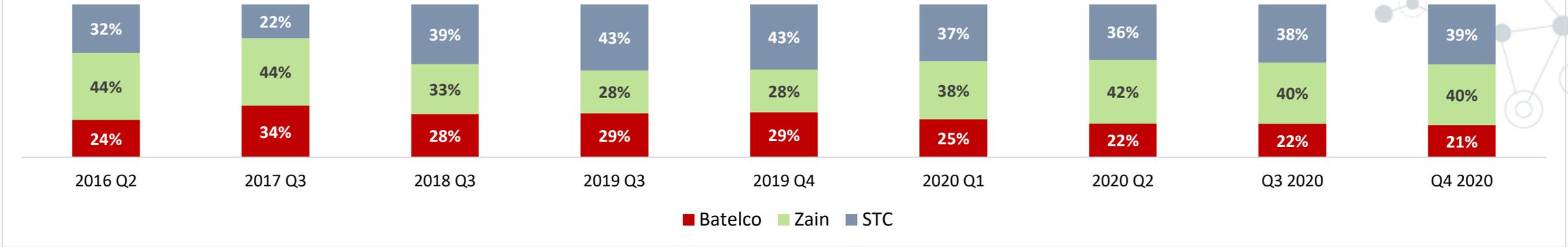
Quarterly data consumption (Petabyte)



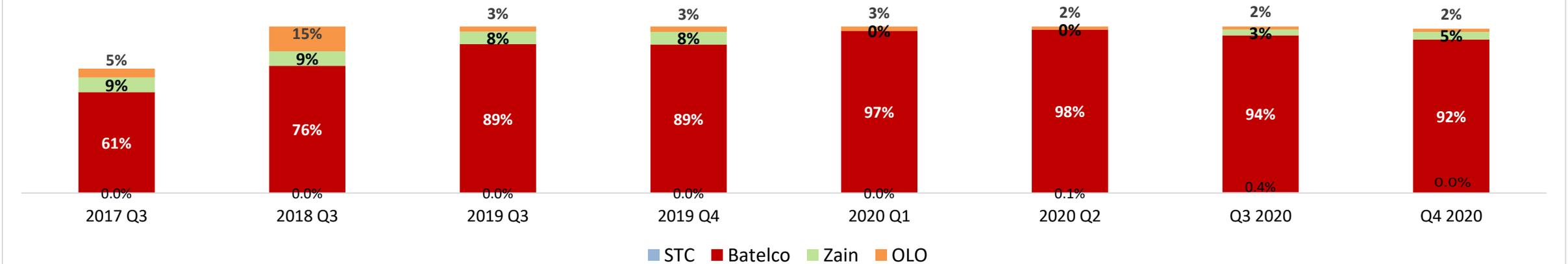
*Average fixed wireless traffic is relatively high due to non-residential subscribers having high usage

Broadband services: Data Traffic 2 of 2

Mobile Broadband Traffic Market Share (Pay-Per-Use, Standalone & Add-on)



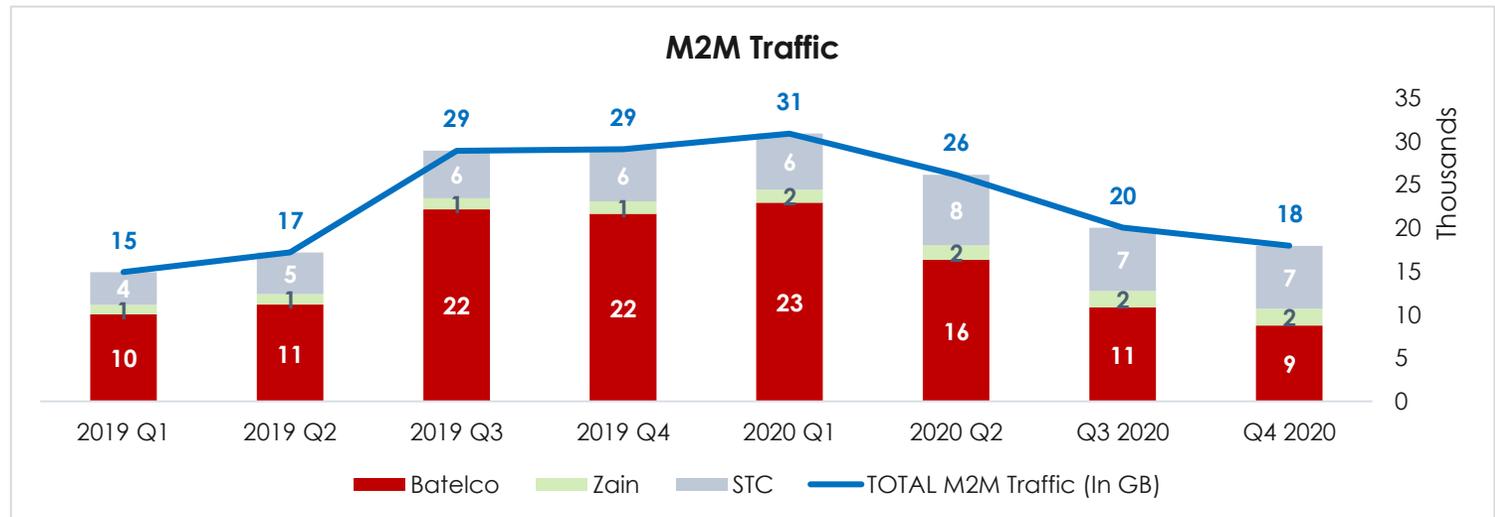
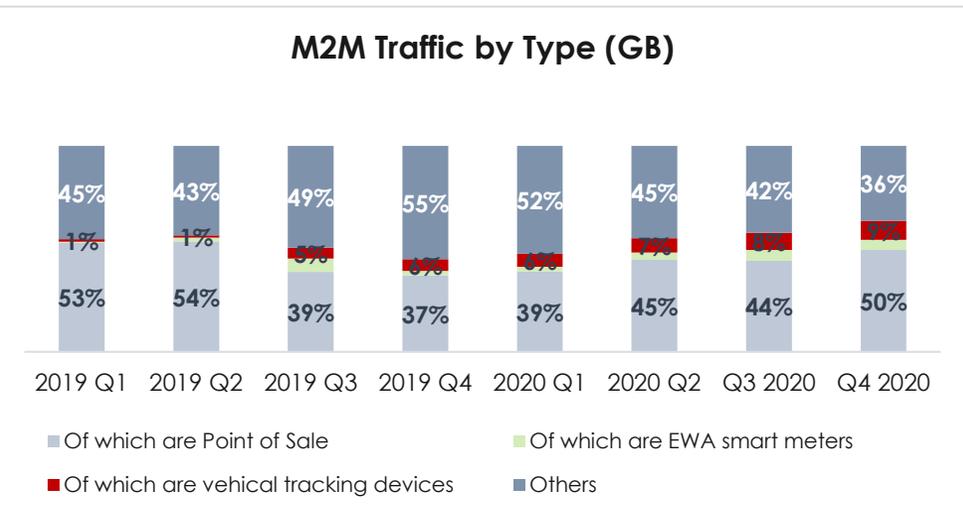
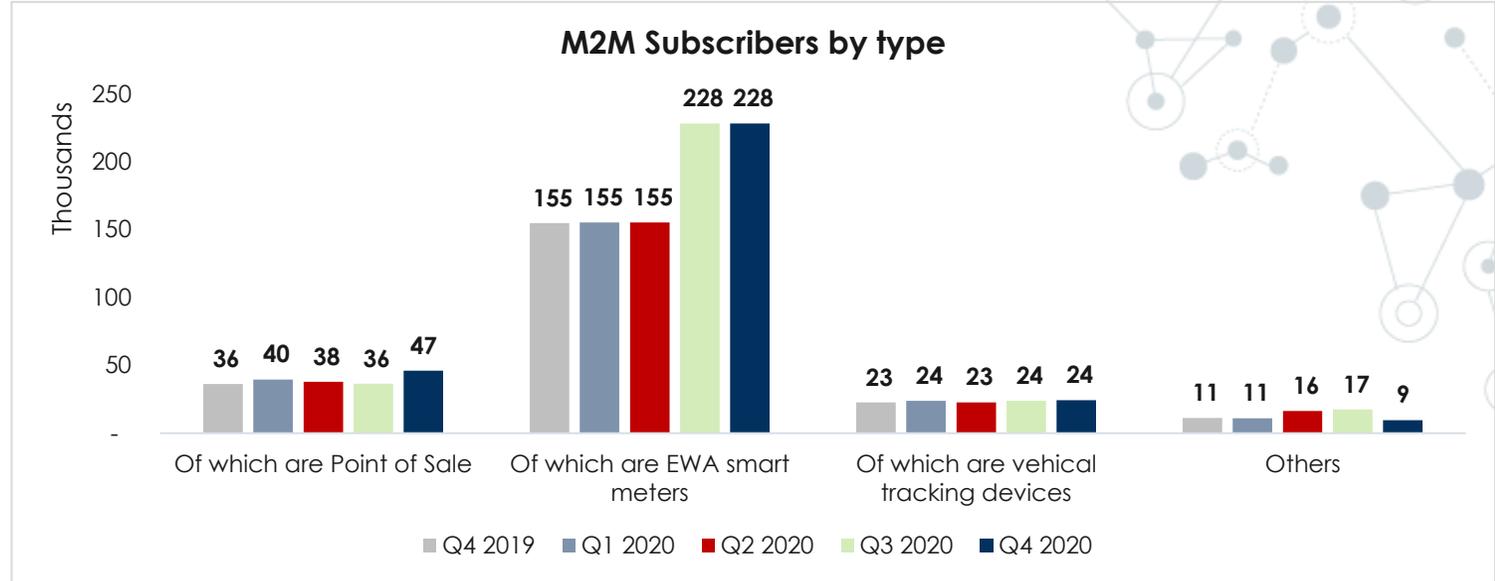
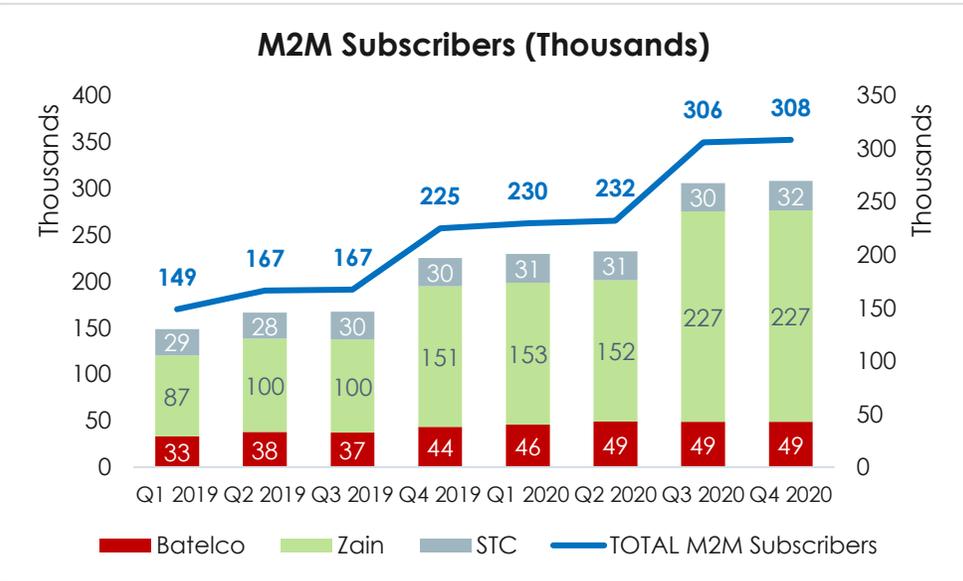
Fixed Broadband Traffic Market Share**



*Fixed wired data traffic was revised from June 2018.

**An operator's internet broadband services which are provided over TDD LTE network under Fixed Wireless have been included under Mobile Standalone as of 2020.

M2M Subscribers & Traffic



*Fixed wired data traffic was revised from June 2018

Definitions

Fixed-telephone subscriptions

Fixed-telephone subscriptions refers to the sum of all active

- i) analogue fixed-telephone lines,
 - ii) voice-over-IP (VoIP) subscriptions,
 - iii) fixed wireless local loop (WLL) subscriptions,
 - iv) ISDN voice-channel equivalents,
 - v) fixed public payphones and vi) satellite-based subscriptions
- provided to fixed locations that allow for a voice communication. This indicator was previously called Main telephone lines in operation.

*Active lines are those that have registered an activity in the past three months.

Prepaid mobile-cellular telephone subscriptions

Prepaid mobile-cellular telephone subscriptions (ITU code i271p) refers to the total number of mobile-cellular telephone subscriptions that use prepaid refills. These are subscriptions where, instead of paying an ongoing monthly fee, users purchase blocks of usage time. Only active subscriptions should be included (those used at least once in the last three months for making or receiving a call or carrying out a non-voice activity such as sending or reading an SMS or accessing the Internet).

Postpaid mobile-cellular telephone subscriptions

Postpaid mobile-cellular telephone subscriptions Refers to the total number of mobile-cellular subscriptions where subscribers are billed after their use of mobile services, at the end of each month. The postpaid service is provided on the basis of a prior arrangement with a mobile cellular operator. Typically, the subscriber's contract specifies a limit or allowance of minutes, text messages, etc. The subscriber will be billed at a flat rate for any usage equal to or less than that allowance. Any usage above that limit incurs extra charges. Theoretically, a subscriber in this situation has no limit on use of mobile services and, as a consequence, unlimited credit.

Active mobile-broadband subscriptions

Active mobile-broadband subscriptions refers to the sum of active handset-based and computer-based (USB/dongles) mobile-broadband subscriptions that allow access to the Internet. It covers actual subscribers, not potential subscribers, even though the latter may have broadband-enabled handsets. Subscriptions must include a recurring subscription fee or if in the prepayment modality, pass a usage requirement – users must have accessed the Internet in the last three months.

Clarification: For mobile data subscription to be considered broadband, the operator must advertise a connection that will be capable of using at least a 3G/UMTS network, so that a nominal downloading speed of 256 kbit/s is at a minimum expected. Hence, subscriptions that are only to use GPRS and EDGE technologies are to be excluded. A contract (post pay) subscription pays a recurrent bill with a predetermined frequency. It should be counted as an active mobile broadband subscription no matter the effective data consumption realized by the user. A prepayment or a pay-as-you-go subscription needs to pass the activity criterion to be considered as 'active': a billable Internet connection must have occurred in the last three months. Note that for a mobile subscription to be considered broadband it must allow access to the public open Internet, hence, any subscription that limits access only to walled garden or services provided in exclusivity by the mobile operator, are not counted as access to the open Internet, and hence, are not 'broadband'. Several cases are defined below. (See Table 4 in ITU document)

Thank you

