



هيئة تنظيم الاتصالات
Telecommunications Regulatory Authority
مملكة البحرين - Kingdom of Bahrain

Quarterly Market Indicators

Q2 2017



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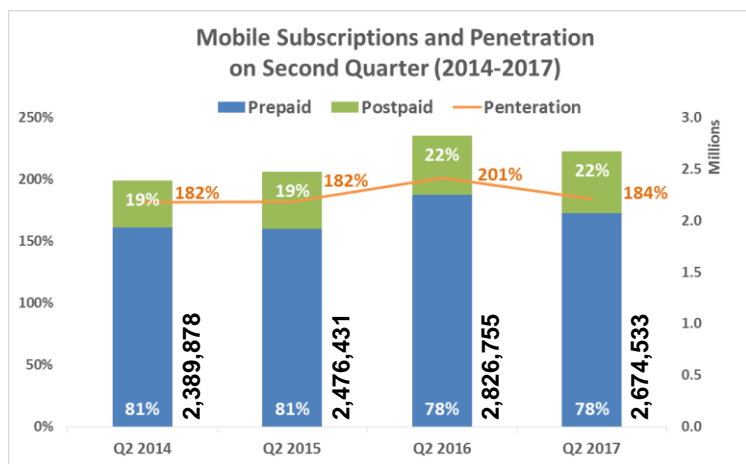
Mobile services: Subscriptions

By the end of Q2 2017, 2.67 million mobile subscriptions were reported; which is a 11 % decrease from the end Q4 2016 and a 5% decrease compared to the end of Q2 2016.

Mobile penetration rate was 184% by the end of Q2 2017.

By the end of Q2 2017, 78% of total mobile subscriptions were prepaid mobile subscriptions.

3,751 mobile numbers were successfully ported during Q2 2017, a 71% decrease compared to Q2 2016.



*Based on 2017 mid-year population estimated by CIO 1,451,200
Source: TRA analysis based on operators data.

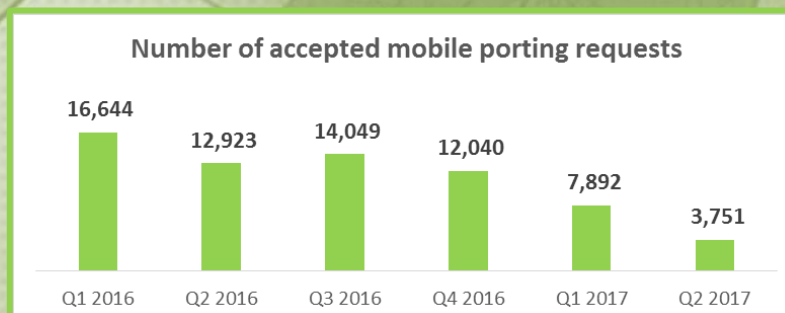
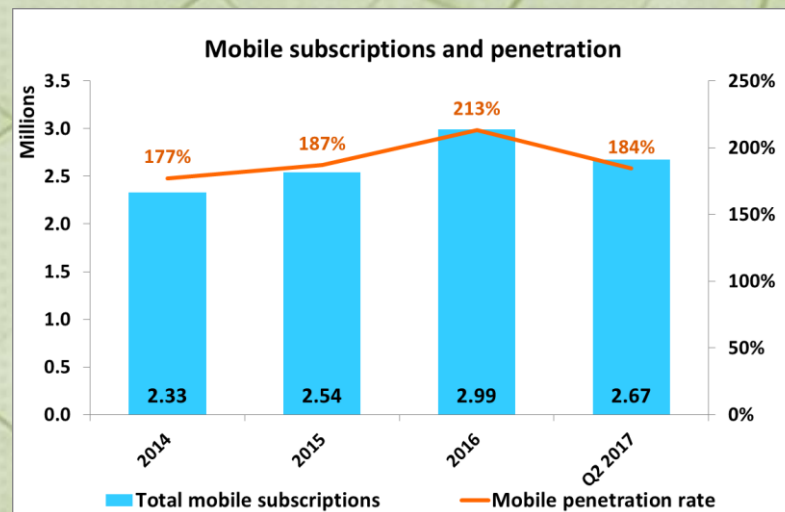
Number of mobile subscriptions



Q2 2017
2.67 million
184% Penetration rate

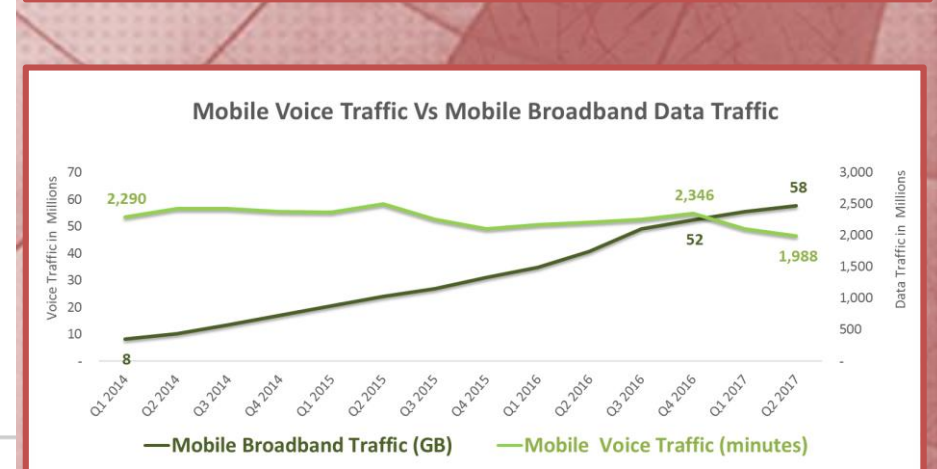
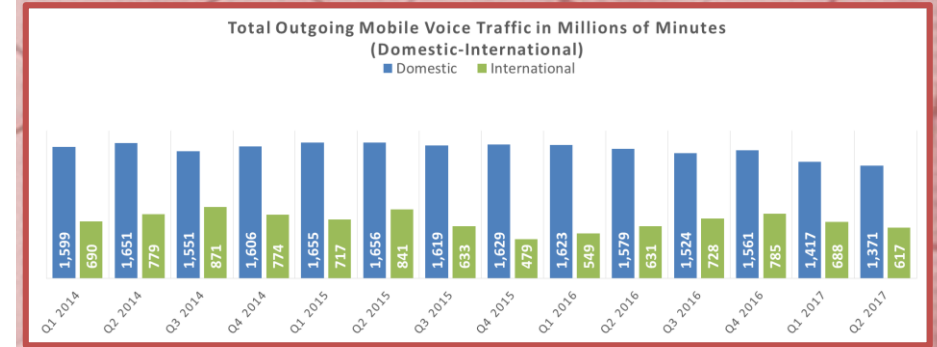
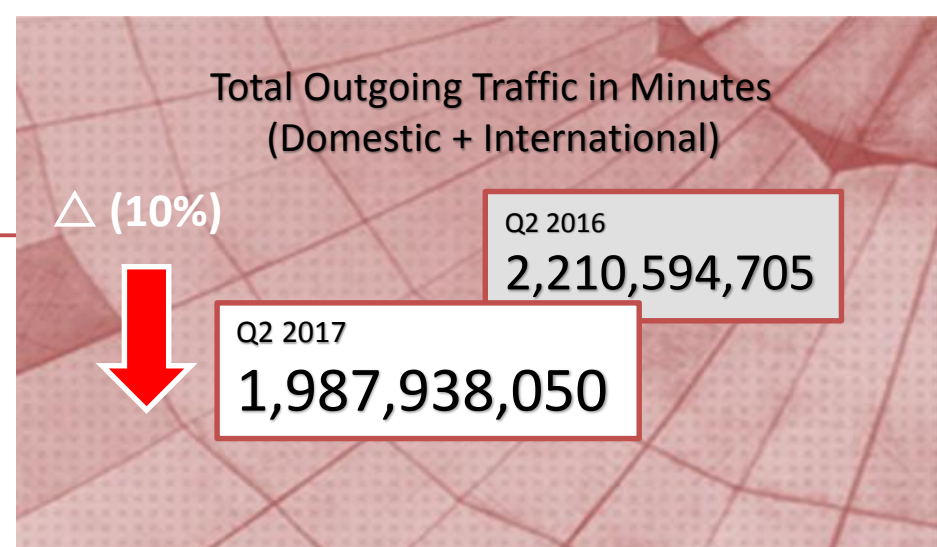
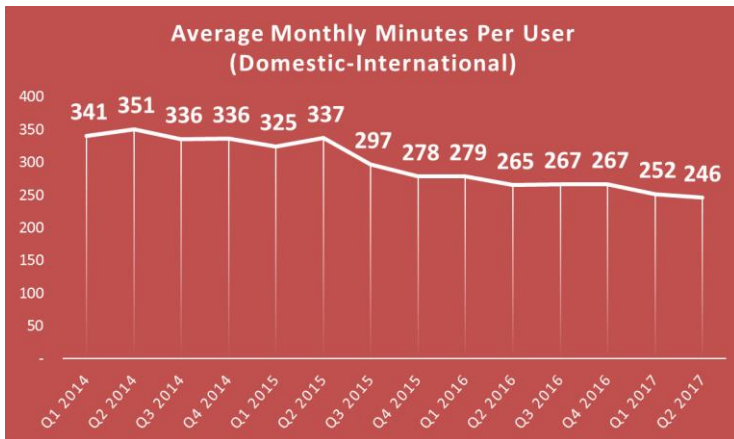


	2013	2014	2015	2016	Q2 2017
Total	2.21 m	2.33 m	2,54 m	2.99 m	2.67 m
% of Prepaid	80%	78%	78%	81%	78%
% of Postpaid	20%	22%	22%	19%	22%



Mobile services: Traffic (Minutes)*

- In Q2 2017, the total outgoing mobile minutes decreased by 10% compared to Q2 2016.
- The Total domestic mobile traffic decreased by 13% (208 million minutes) in Q2 2017 compared to Q2 2016, whereas the total international mobile voice traffic decreased by 2% (14.8 million minutes).
- Prepaid voice traffic continued to account for the majority of outgoing domestic mobile calls and represents 61% of total domestic mobile voice traffic in Q2 2017.
- In Q2 2017, the monthly average minute per user reached 246 minutes compared to 267 in Q2 2016.



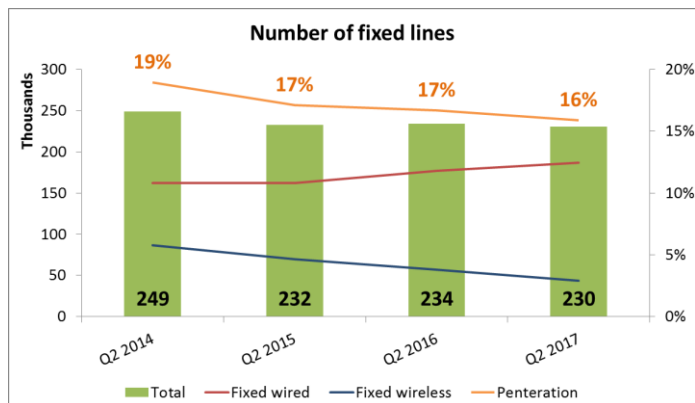
*1- Domestic traffic originated from mobile has been adjusted due to resubmission from an operator
 2- International traffic has been adjusted by eliminating roaming traffic

Fixed telephony services: Subscriptions (PSTN & Wireless)

In Q2 2017, the number of fixed telephony subscriptions decreased by almost 2% (230,176 down from 235,437 on Q4 2016).

Despite the overall decrease on fixed telephony services, the fixed wired telephony services continue to increase as it has recorded an increased of 6,541 subscription from Q4 2016 to Q2 2017, compared to decrease of 11,802 of fixed wireless subscriptions over the same period.

The majority of fixed line porting requests are received from businesses, as they tend to port all of their fixed lines from an operator to another, which explains the high discrepancy between each quarter.

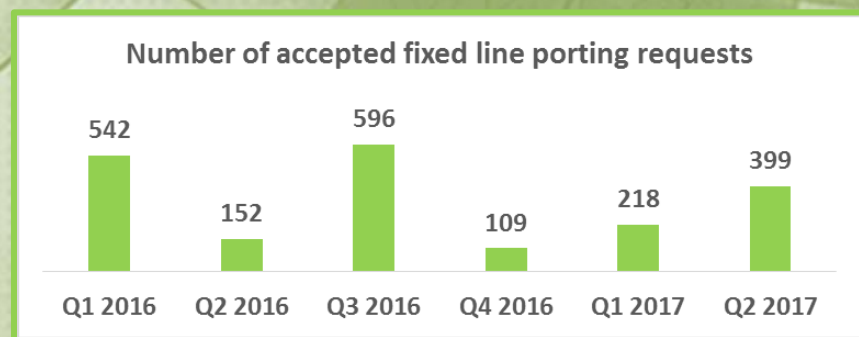
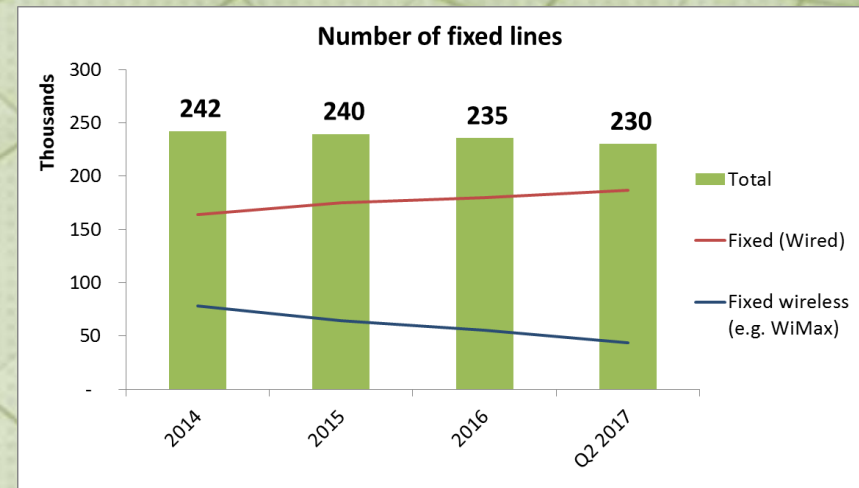


Number of fixed line subscriptions

Q2 2017
230,176
16% penetration rate



Fixed lines	2014	2015	2016	Q2 2017
Fixed wired	68%	73%	76%	81%
Fixed wireless	32%	27%	24%	19%
Total	242,090	239,521	235,437	230,176



*Based on 2017 mid-year population estimated by CIO 1,451,200
Source: TRA analysis based on operators data.

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

- The Total fixed telephony domestic outgoing voice traffic continued to decline in Q2 2017, as it has decreased by 5% between Q1 2017 and Q2 2017, and by 21% compared to Q2 2016.
- The monthly average outgoing minutes per subscription decreased as it has reach 150 minutes in Q2 2017 compared to 185 minutes in Q2 2016.

Total fixed domestic outgoing traffic in minutes

△ (21%)



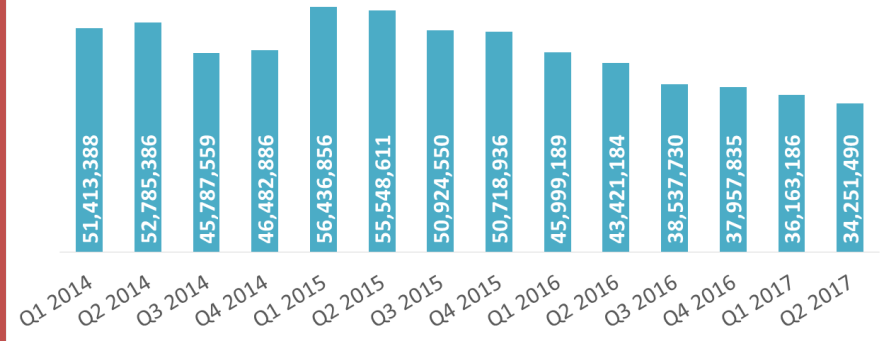
Q2 2016

43,421,184

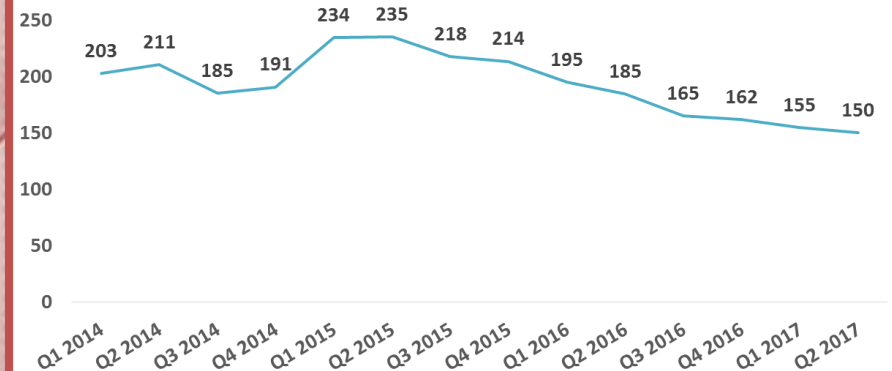
Q2 2017

34,251,490

Fixed Line Total Domestic Outgoing Traffic (Minutes)

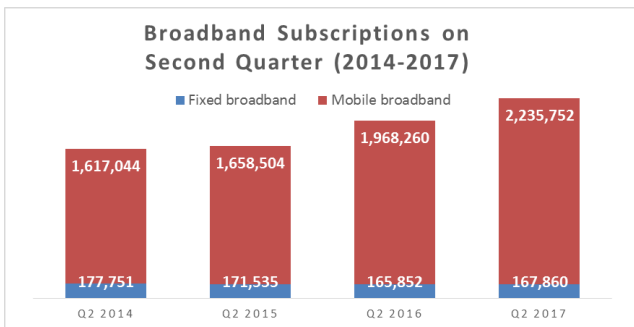


Average Outgoing Domestic Minutes Per Subscription



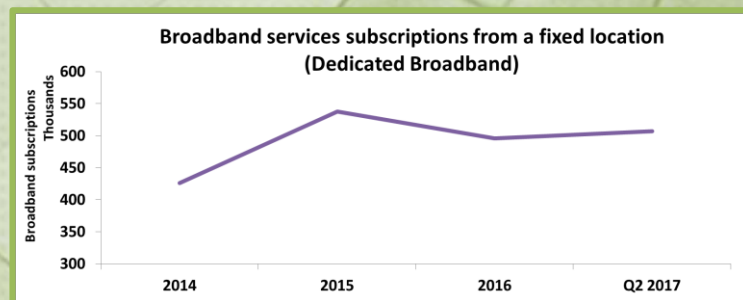
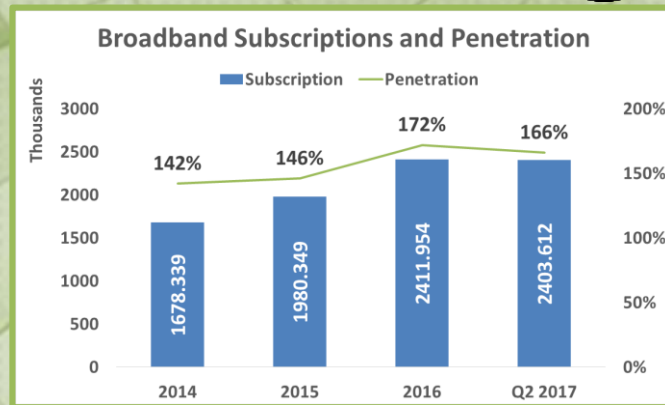
Broadband services: Subscriptions

- At the end of Q2 2017, there were about 2.4 million broadband subscriptions, a decrease of (0.2%) compared to Q4 2016.
- Broadband penetration reached 166% at the end of Q2 2017.
- The main drive for the growth of broadband subscriptions is the mobile broadband subscriptions as it represents 93% of total broadband subscriptions at the end of Q2 2017.
- Add-on broadband to voice and pay-per-use mobile broadband represent 82% of mobile broadband subscriptions at the end of Q2 2017.
- The overall broadband subscriptions has increased by 1.2% comparing Q2 2017 to Q2 2016, that increase was mainly due to increase in mobile broadband subscriptions.



Number of broadband subscriptions

Q2 2017
2.4 million
166% penetration rate

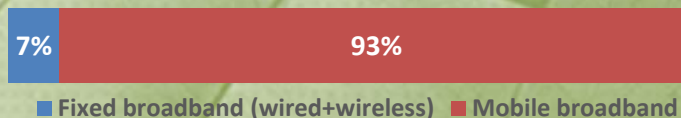


Mobile Broadband

Q2 2017 **Standalone 18%**



Proportion of broadband subscriptions by access type Q2 2017



*Based on 2017 mid-year population estimated by CIO 1,451,200
Source: TRA analysis based on operators data.

Broadband services: Data Traffic

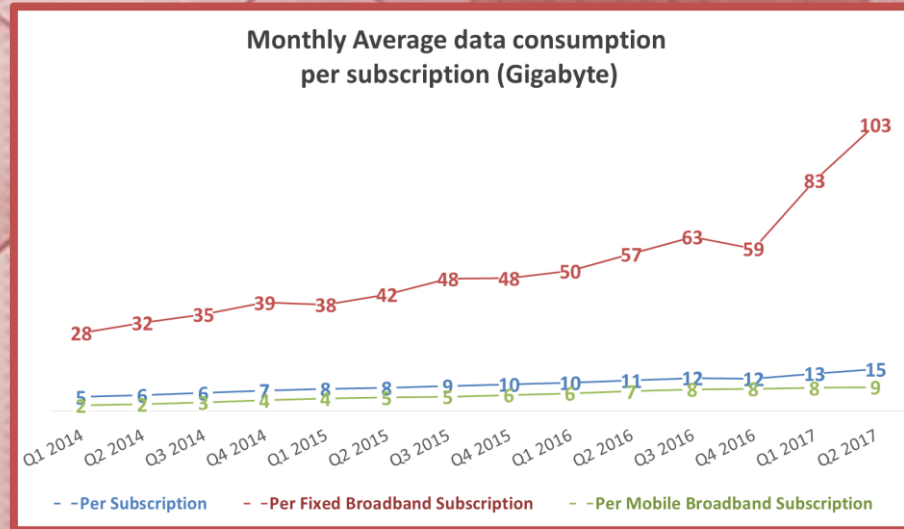
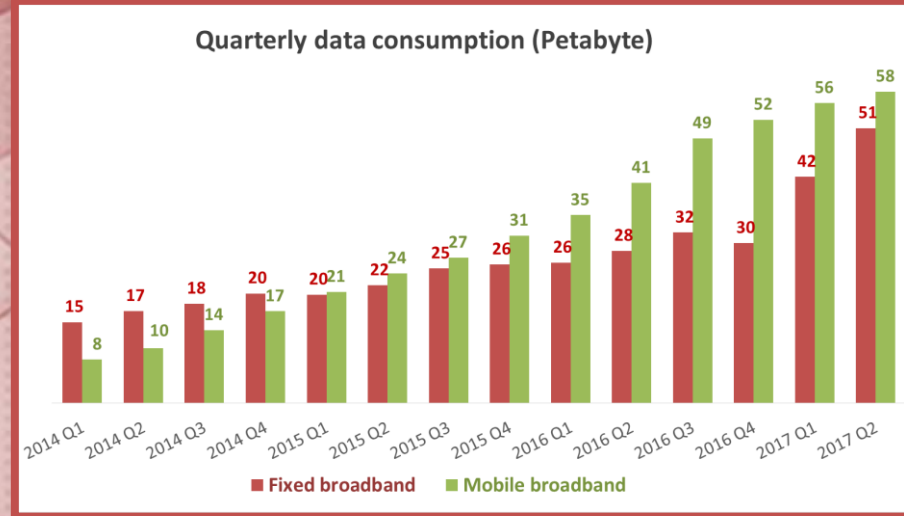
Data traffic increased from 69 million GB in Q2 2016 to 108 million GB in Q2 2017, a 57% increase.

Mobile broadband traffic has increased by 16.9 PB, an increase of 41% from Q2 2016 to Q2 2017, while the fixed broadband traffic has increased by 22.7 PB, which is a 80% increase over the same period.

Despite the fact that mobile broadband traffic continued to account for the majority of total broadband traffic as it represented 51% in Q2 2017, the monthly average mobile broadband traffic per mobile subscription is 9 GB compared to the monthly average fixed broadband traffic per fixed subscription, which is 103 GB.

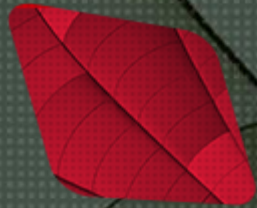
Overall, the monthly average traffic per user is 15 GB in Q2 2017 compared to 11 GB in Q2 2016.

Total data traffic in Gigabyte



Definitions

Indicator	Definition
Fixed-telephone subscriptions	Fixed-telephone subscriptions refers to the sum of active number of analogue fixed-telephone lines, voice-over-IP (VoIP) subscriptions, fixed wireless local loop (WLL) subscriptions.
Prepaid mobile subscribers	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 subscribers	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	<p>Active mobile-broadband subscriptions refers to the sum of standard mobile-broadband and dedicated mobile broadband subscriptions to the public Internet. It covers actual subscribers, not potential subscribers, even though the latter may have broadband enabled-handsets. The indicator can be further broken down into:</p> <p>Standard mobile-broadband subscriptions (ITU code i271mb_active): Refers to active mobile-cellular subscriptions with an advertised data speed of 256 kbit/s or greater that allow access to the greater Internet via HTTP and have been used to make a data connection using Internet protocol (IP) in the previous three months. Standard SMS and MMS messaging do not count as active Internet data connections, even if they are delivered via IP.</p> <p>This includes mobile subscriptions that use mobile-broadband services on a pay-per-use basis. It excludes mobile subscriptions with a separate monthly data plan for mobile-broadband access (see Indicator 25b, Dedicated mobile broadband subscriptions).</p> <p>Dedicated mobile-broadband subscriptions (ITU code i271md): Refers to subscriptions to dedicated data services (over a mobile network) that allow access to the greater Internet and that are purchased separately from voice services, either as a standalone service (e.g. using a data card such as a USB modem/dongle) or as an add-on data package to voice services that requires an additional subscription. All dedicated mobile-broadband subscriptions with recurring subscription fees are included as 'active data subscriptions' regardless of actual use. Prepaid mobile-broadband plans require use in the last three months if there is no monthly subscription. This indicator could also include mobile WiMAX subscriptions.</p>



Thank you