



## Telecommunications services indicators in the Kingdom of Bahrain

### Press Conference TRA

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***13 February 2008***

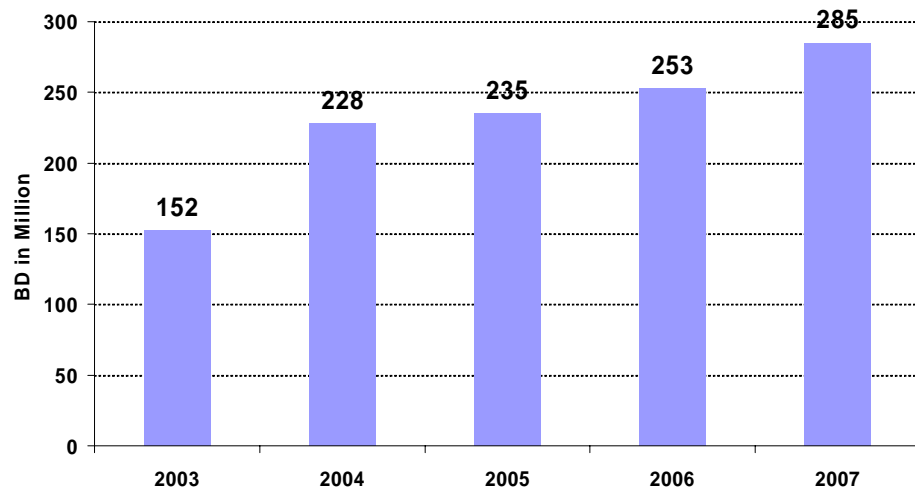
1. The collection, analysis and dissemination of accurate and timely market information significantly enhances the design of effective, proportional and efficient market regulation
2. Telecommunications Regulatory Authority (TRA) has commenced a process of collecting market information from licensed operators on a twice yearly basis – in January and July
3. The publication of market information should prove beneficial to licensed operators, consumer and business user groups by tracking the developments in the sector over time

- The “Telecommunications services indicators in the Kingdom of Bahrain” covers a large range of telecommunications services indicators such as:
  - subscribers number,
  - penetration rates,
  - calls usage and
  - telecommunications revenues
- for each of the telecom services:
  - Overall market data
  - Fixed line services
  - Internet services
  - International calls services
  - Leased line services

# Growth in the revenues and employees in the telecom sector

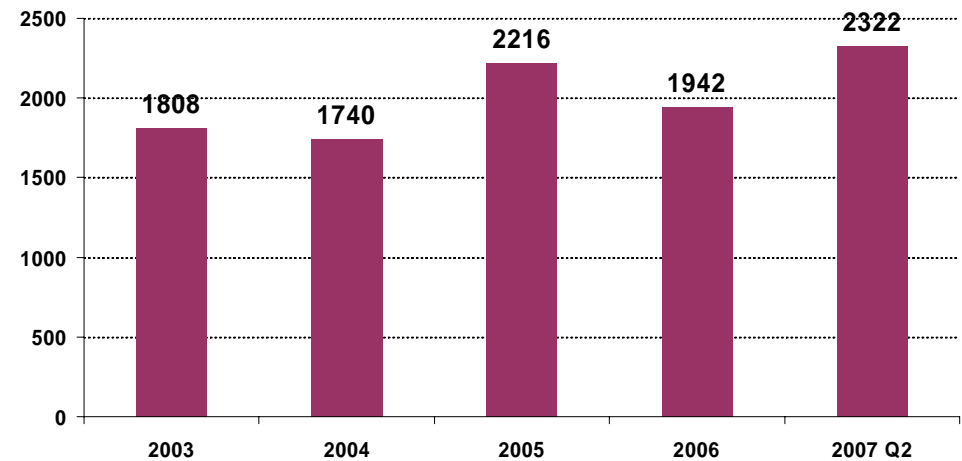


Growth in the telecommunications sector revenues (2003 - 2007)



**13% Growth in the revenues in 2007 with revenues in 2007 at 187% of the 2003 level at time of liberalisation**

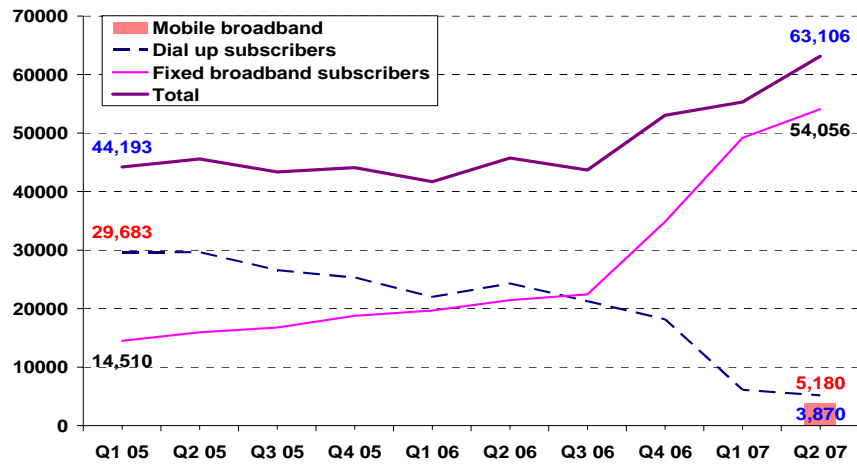
Number of employees in the telecommunications operators (2003 - 2007 Q2)



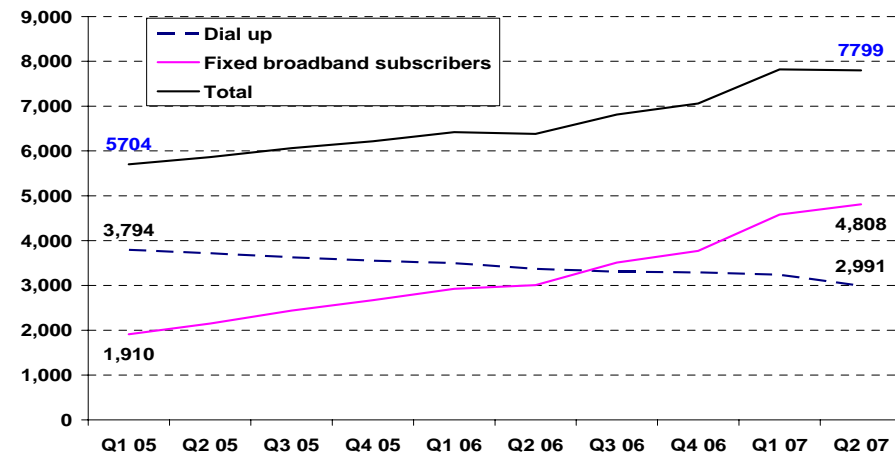
**19% growth in the number of employees between 2006 and 2007 Q2**  
**We now have 128% of the level of employees at the time of liberalisation**

# Internet subscribers

## Residential

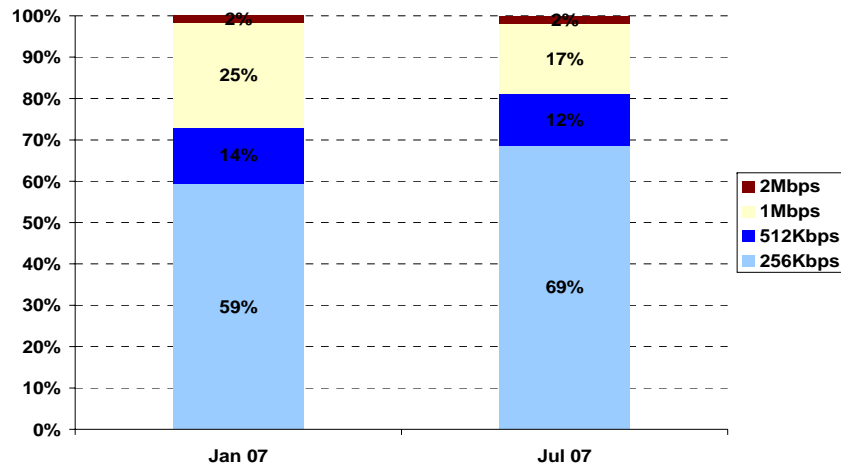


## Business

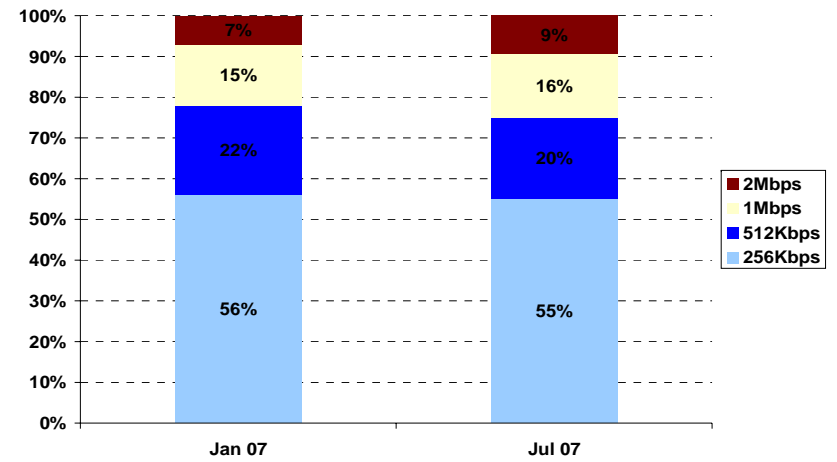


# Proportion of broadband subscribers

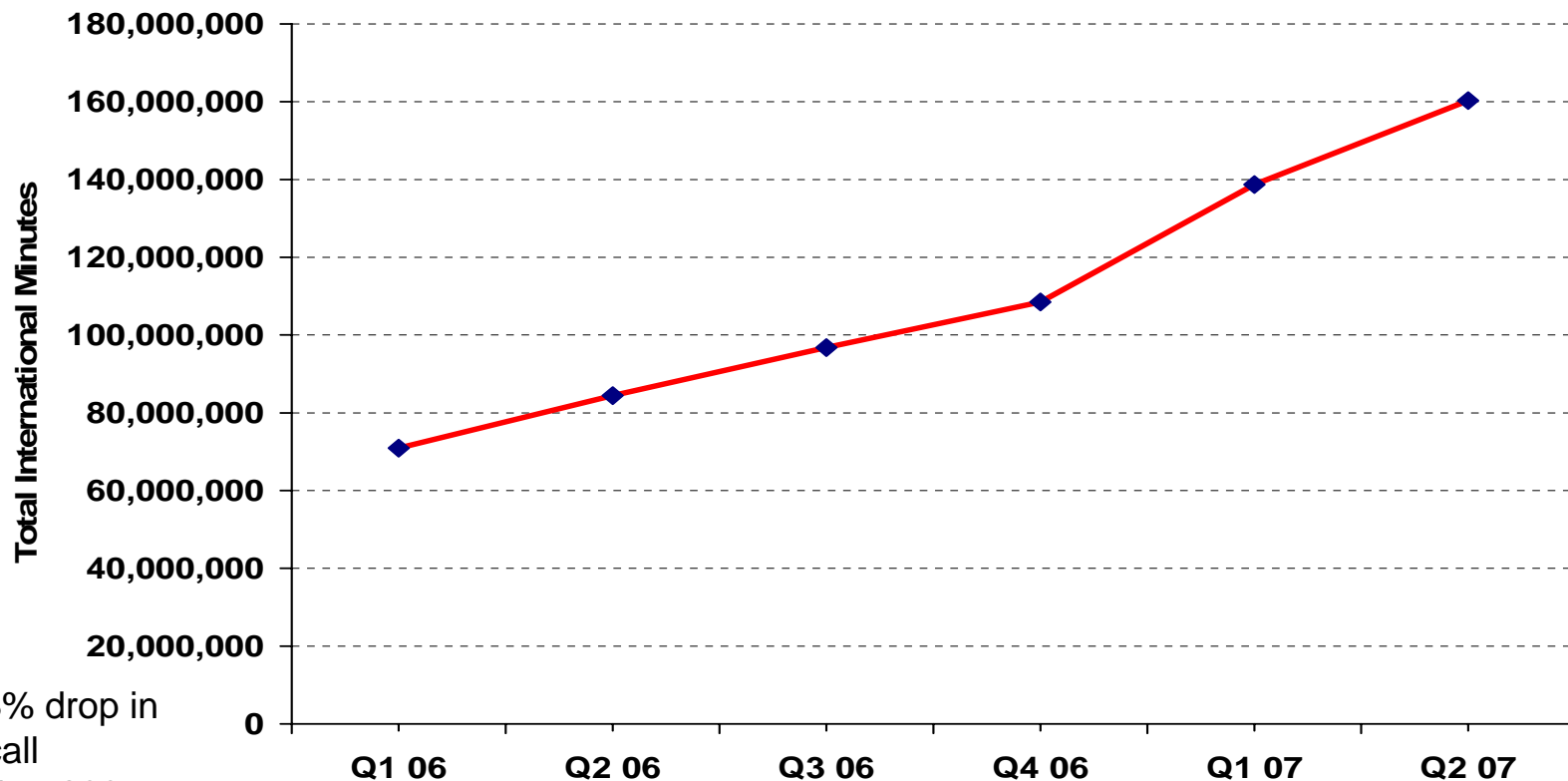
## Residential



## Business



## 90% Growth in the international outgoing minutes between Q2 2006 to Q2 2007



Average of 53% drop in international call charges (2004 to 2007 Q2)

## Some other points to look at

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- Of the 63 companies who have been issued licences 17 are active
- The majority of these are in the international PPCC market
- Consumers are being presented with an increased choice of provider not only for their voice calls but also for internet access
- Government estimates on population have changed from c760,000 to c1.1 million
- Given current penetration of mobile and fixed the potential growth in the market is larger than it was thought

- **Liberalisation has benefited Bahrain**
  - Increased employment
  - Increased choice
  - Decreased in certain charges
- **But there is still room for further benefit**
  - MENA will launch BB wireless service in 2008
  - Increased competition in international access which will put pressure on international prices
  - Increased BB speeds and lowering of prices
  - Increased benefits to business and consumers
- **Extends measure to Quality of Service**
- **Will assist in removing artificial barriers to market development**
- **Strategic Review – Decision next month**
- **Thank you to all operators investing in Bahrain**