








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

Quarterly Market Indicators

Q1 2016



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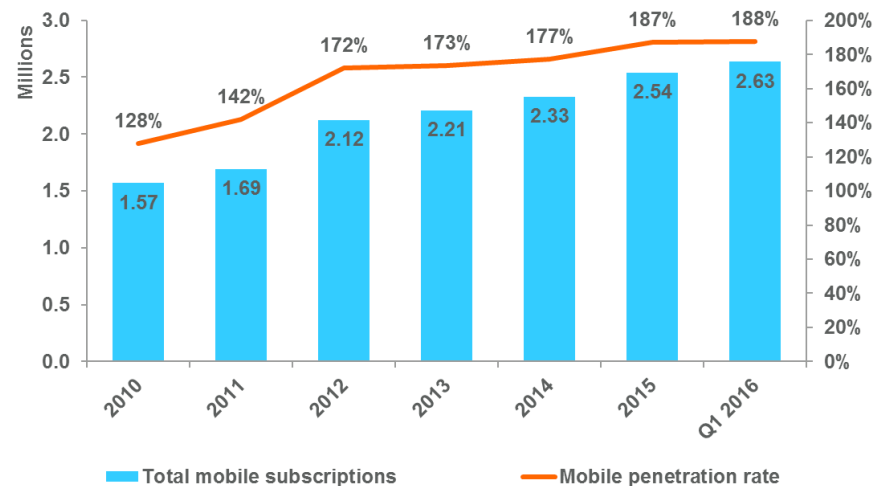
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Mobile services

- At the end of Q1 2016, there were 2.6 million mobile subscriptions in Bahrain.
- Mobile penetration at the end of Q1 2016 is 188%.
- The total number of mobile subscriptions increased by almost 4% between end of 2015 and Q1 2016.
- At the end of Q1 2016, prepaid mobile subscriptions represented 78% of total mobile subscriptions.

Mobile subscriptions and penetration



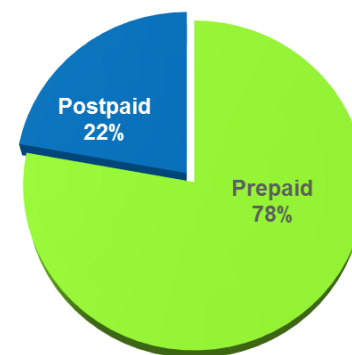
Source: TRA analysis based on operators data.
 Note: Population used for calculating the penetration is based on Mid-Year Population Projections for the Kingdom of Bahrain based on CIO

Number of mobile subscriptions

	2010	2011	2012	2013	2014	2015	Q1 2016
Prepaid	1,289,274	1,379,820	1,720,958	1,777,864	1,821,364	1,975,192	2,051,025
Postpaid	278,472	313,830	402,945	432,326	507,630	566,496	583,404
Total	1,567,746	1,693,650	2,123,903	2,210,190	2,328,994	2,541,688	2,634,429

Source: TRA analysis based on operators data.

Proportion of prepaid and postpaid subscriptions as of Q1 2016



Source: TRA analysis based on operators data.

Note 1: Based on 2016 mid-year population estimated by CIO 1404900

Fixed telephony services

At the end of Q1 2016 there were 232,600 Fixed-telephone lines compared to 239,500 in 2015 (drop by 3%).

The number of fixed (wired) telephone lines is showing a slight decrease between 2015 and Q1 2016 (1%),

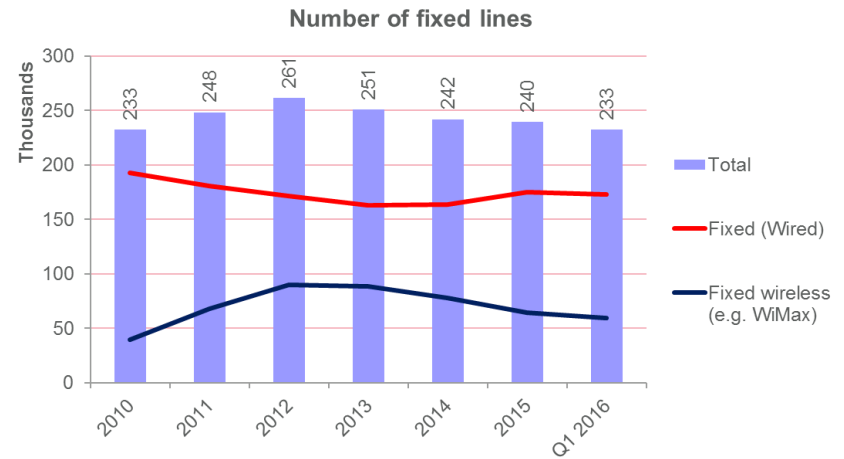
while the number of fixed wireless telephone lines (e.g. WiMax) dropped by 8% between 2015 and Q1 2016.

At the end of same quarter, fixed wire telephony represented 74% of total fixed lines, compared to 73% of the total fixed lines in the end of 2015.

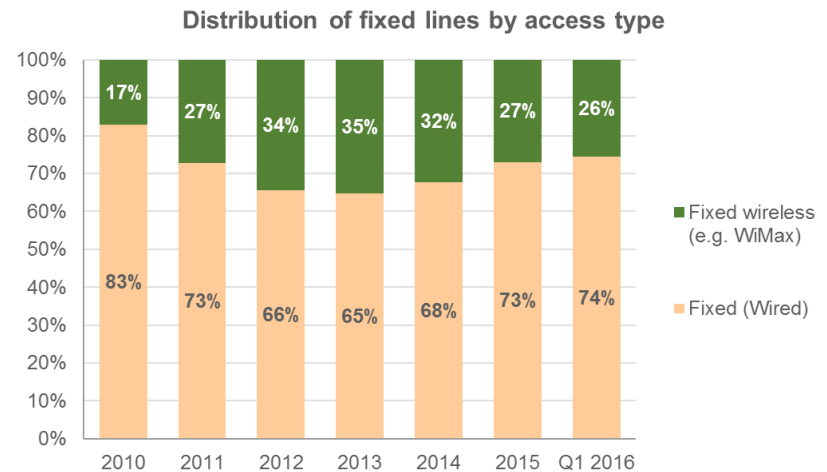
Number of fixed lines

Fixed lines	2010	2011	2012	2013	2014	2015	Q1 2016
Fixed wired	192,932	180,514	171,238	162,732	164,085	174,979	172,985
Fixed wireless	39,626	67,966	90,122	88,342	78,005	64,542	59,624
Total	232,558	248,480	261,360	251,074	242,090	239,521	232,609

Source: TRA analysis based on operators data.



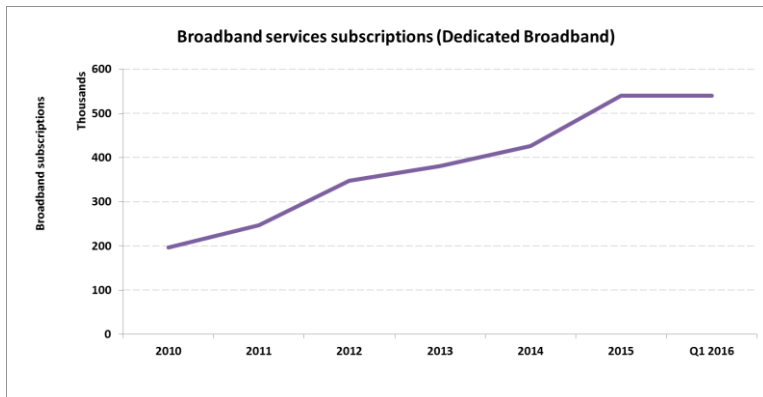
Source: TRA analysis based on operators data.



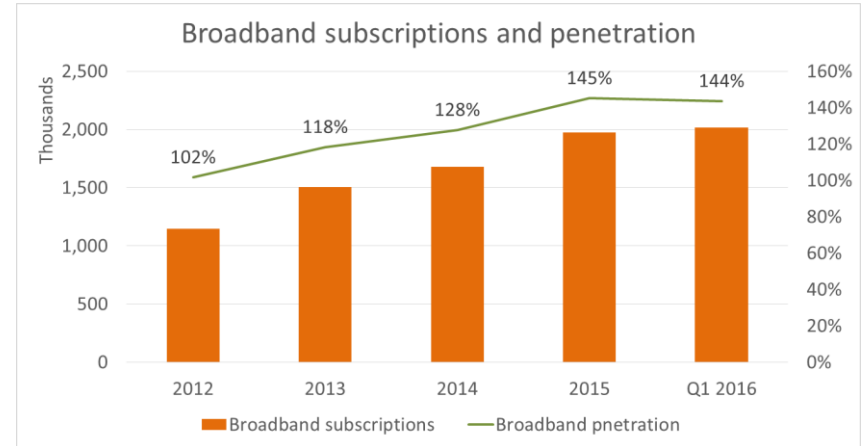
Source: TRA analysis based on operators data.

Broadband services

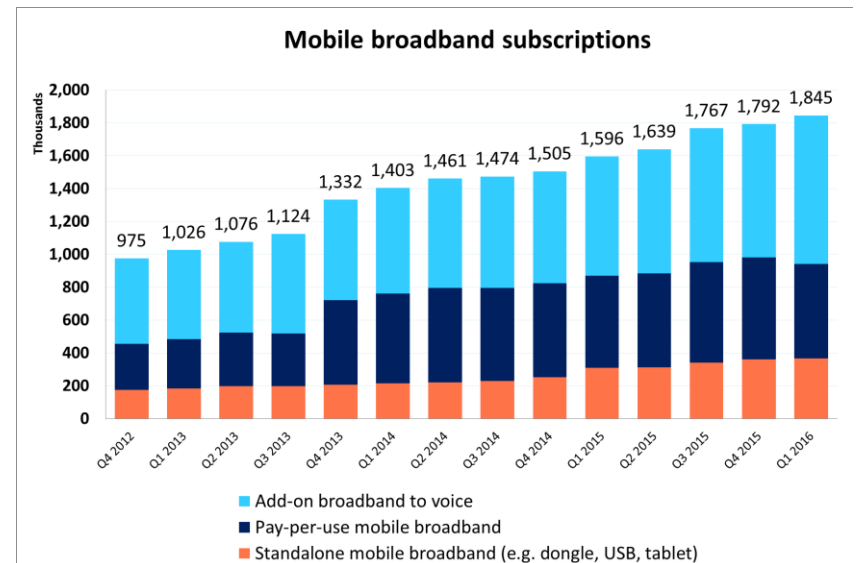
- At the end of Q1 2016, there were about 2 million broadband subscriptions, a 2% increase compared to Q4 2015.
- Broadband penetration reached 144% at the end of Q1 2016 compared to 145% in Q4 2015.
- The main drive for the growth of broadband subscription is the mobile broadband subscriptions.
- Mobile broadband subscribers represented 89% of total broadband subscribers at the end of Q1 2016.
- Standalone mobile broadband remains the fastest growing in the last four years.
- Add-on broadband to voice and pay-per-use mobile broadband represent 80% of mobile broadband subscriptions at the end of Q1 2016.



Source: TRA analysis based on operators data.



Source: TRA analysis based on operators data.

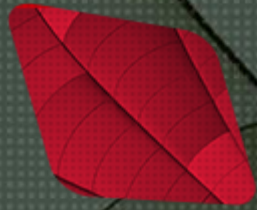


Source: TRA analysis based on operators data.

*Dedicated Broadband includes Fixed wired, Fixed wireless and Standalone mobile broadband

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. 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

