

Quarterly Market indicators

Data at the end of Q1 2014

2014



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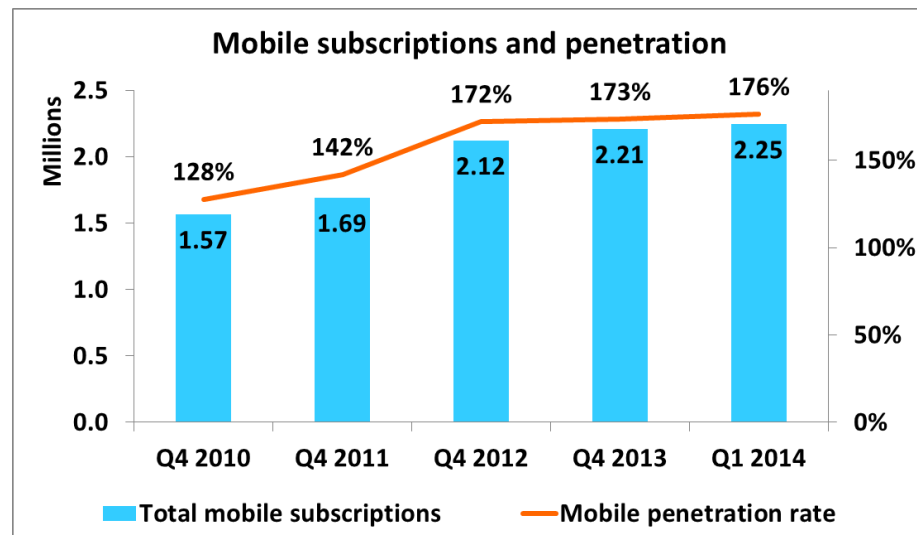
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Mobile services

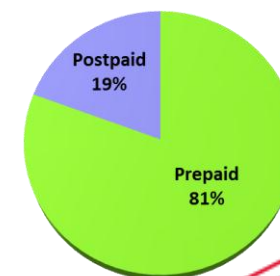
- ▶ At the end of Q1 2014, there were 2.25 million mobile subscriptions in Bahrain.
- ▶ The total number of mobile subscriptions increased by 2% between Q4 2013 and Q1 2014
 - ▶ Prepaid increased by 2%
 - ▶ While postpaid increased by 1%
- ▶ At the end of Q1 2014, prepaid mobile subscriptions represented 81% of total mobile subscriptions
- ▶ Mobile penetration at the end of Q1 2014 is 176% (based on 2013 mid-year population estimated by CIO 1,274,800)



Source: TRA analysis based on operators data.

Note: 2012 and 2013 Population used for calculating the penetration is based on Mid-Year Population Projections for the Kingdom of Bahrain based on CIO

Proportion of prepaid and postpaid subscriptions at the end of Q1 2014



Source: TRA analysis based on operators data.

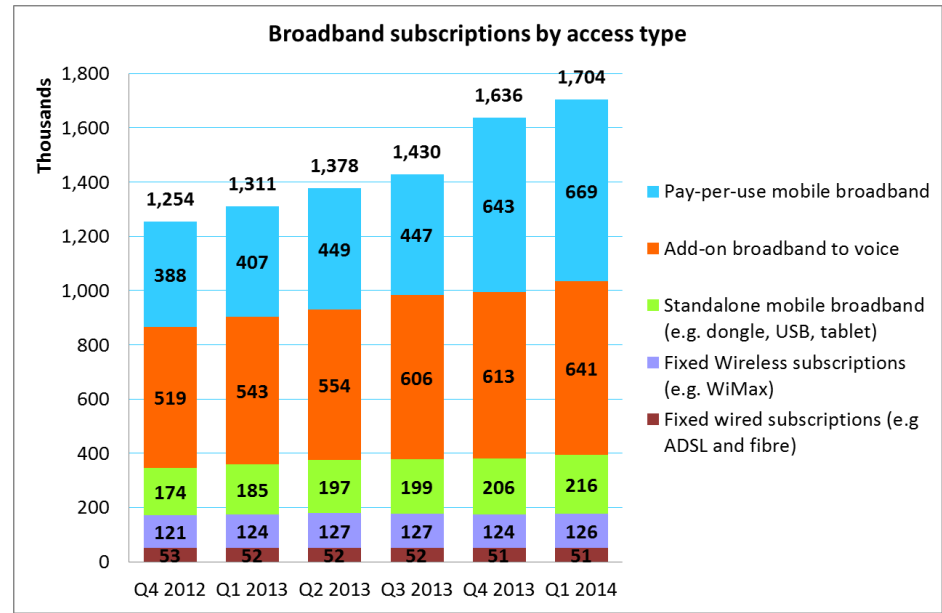
Number of mobile subscriptions

	Q4 2012	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014
Prepaid	1,720,958	1,749,205	1,837,192	1,795,338	1,777,864	1,810,770
Postpaid	402,945	397,266	415,476	428,001	432,326	436,131
Total	2,123,903	2,146,471	2,252,668	2,223,339	2,210,190	2,246,901

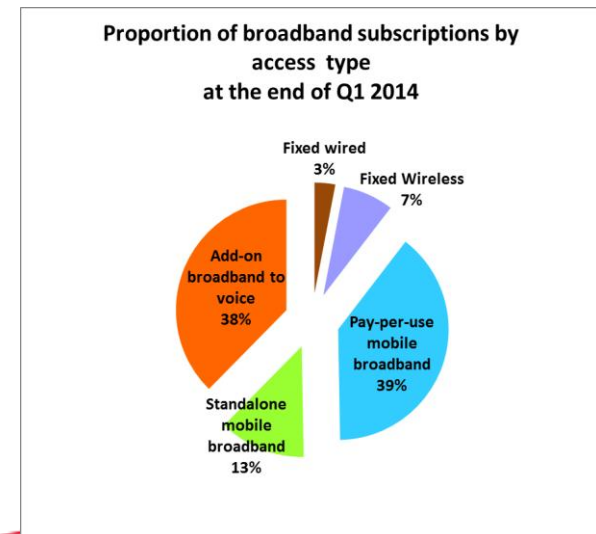
Source: TRA analysis based on operators data.

Broadband services

- ▶ At the end of Q1 2014, there were 1.7 million broadband subscriptions, a 4.1% increase compared to Q4 2013.
- ▶ Broadband penetration at the end of Q1 2014 is 134%
- ▶ Broadband subscription growth has been driven by growth in the number of mobile broadband subscriptions (up 4.4% compared to Q4 2013).
- ▶ Mobile broadband subscribers represented 90% of total broadband subscribers at the end of Q1 2014.



Source: TRA analysis based on operators data.

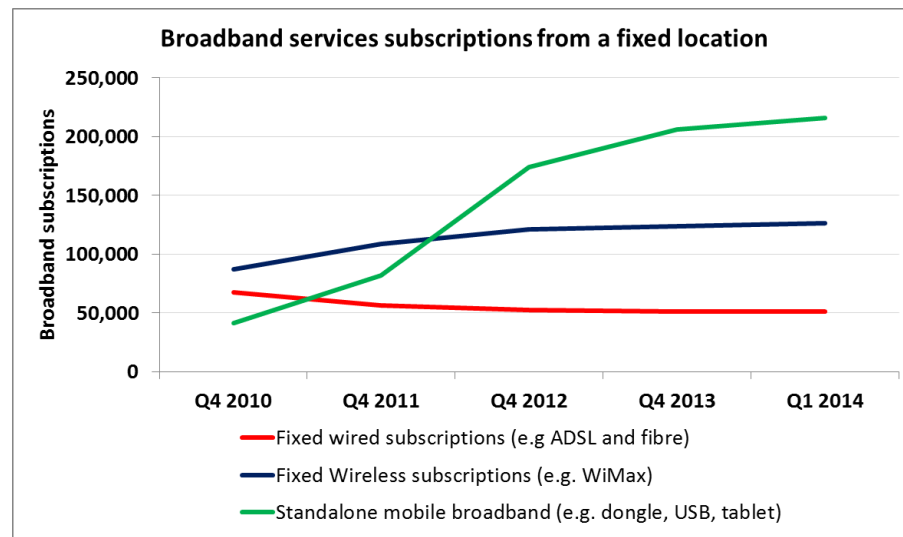


Source: TRA analysis based on operators data.

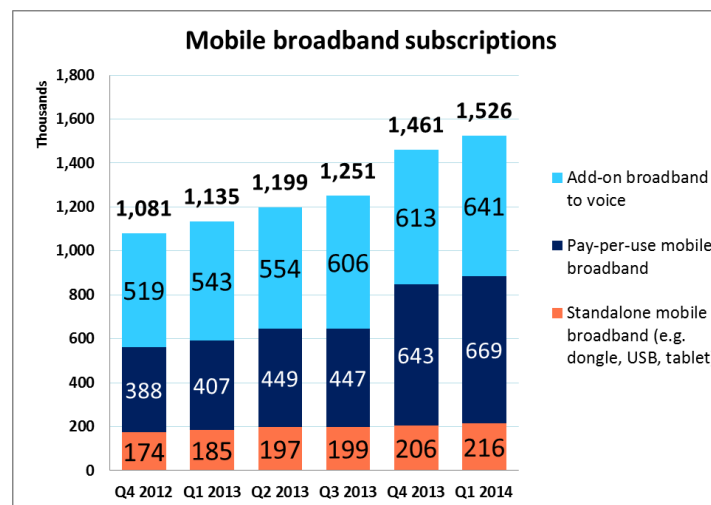
Broadband services

- ▶ At the end of Q1 2014, there were just over 393,621 subscriptions for broadband services from a fixed location.
 - ▶ Standalone mobile broadband represented 55% of the total subscriptions;
 - ▶ Fixed Wireless subscriptions represented 32%; and
 - ▶ Fixed wired subscriptions represented 13%.

- ▶ Add-on broadband to voice and pay-per-use mobile broadband represent 86% of mobile broadband subscriptions at the end of Q1 2014.



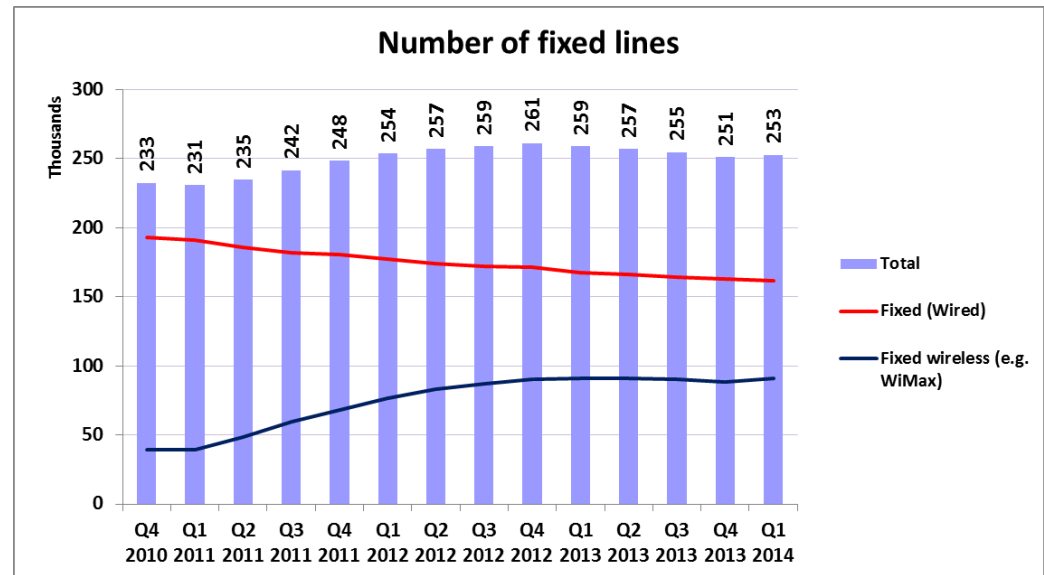
Source: TRA analysis based on operators data.



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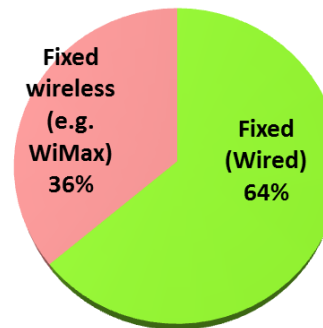
Fixed telephony services

- ▶ At the end of Q1 2014 there were 253,000 Fixed-telephone subscriptions compared to 259,000 in Q1 2013.
- ▶ The number of fixed (wired) telephone lines has continued to decrease in recent quarters.
- ▶ The number of fixed wireless fixed telephone lines (based on WiMax) has been flat during 2013.
- ▶ At the end of Q1 2014, fixed wireless telephony (i.e. WiMax) represented 36% of the total fixed lines.



Source: TRA analysis based on operators data.
 Note: Number of fixed lines including: PSTN, Fixed wireless and voice-over-IP (VoIP).

Proportion of fixed lines at the end of Q1 2014



Source: TRA analysis based on operators data.

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..!

