

# Quarterly Market indicators

Data at the end of Q3 2013

2013



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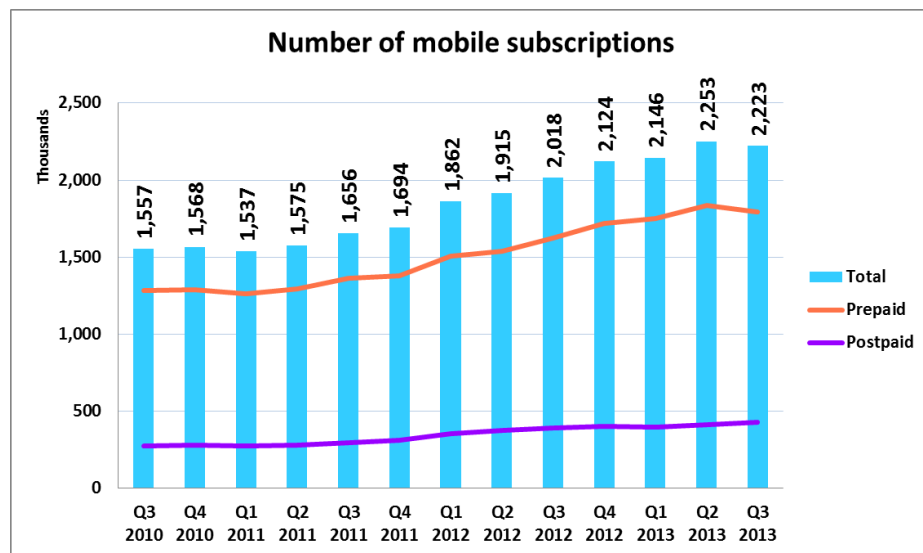
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# Disclaimer

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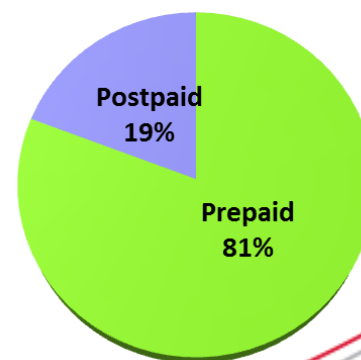
# Mobile services

- ▶ At the end of Q3 2013, there were 2.22 million mobile subscriptions in Bahrain.
- ▶ The total number of mobile subscriptions decreased by 1% between Q2 2013 and Q3 2013
  - ▶ Prepaid decreased by 2%
  - ▶ While postpaid increased by 3%
- ▶ At the end of Q3 2013, prepaid mobile subscriptions represented 81% of total mobile subscriptions
- ▶ Estimated mobile penetration at the end of Q3 2013 is 180%



Source: TRA analysis based on operators data.

**Proportion of prepaid and postpaid subscriptions at the end of Q3 2013**



Source: TRA analysis based on operators data.

## Number of mobile subscriptions

	Q3 2012	Q4 2012	Q1 2013	Q2 2013	Q3 2013
<b>Prepaid</b>	1,626,149	1,720,958	1,749,205	1,837,192	1,795,338
<b>Postpaid</b>	391,529	402,945	397,266	415,476	428,001
<b>Total</b>	<b>2,017,678</b>	<b>2,123,903</b>	<b>2,146,471</b>	<b>2,252,668</b>	<b>2,223,339</b>

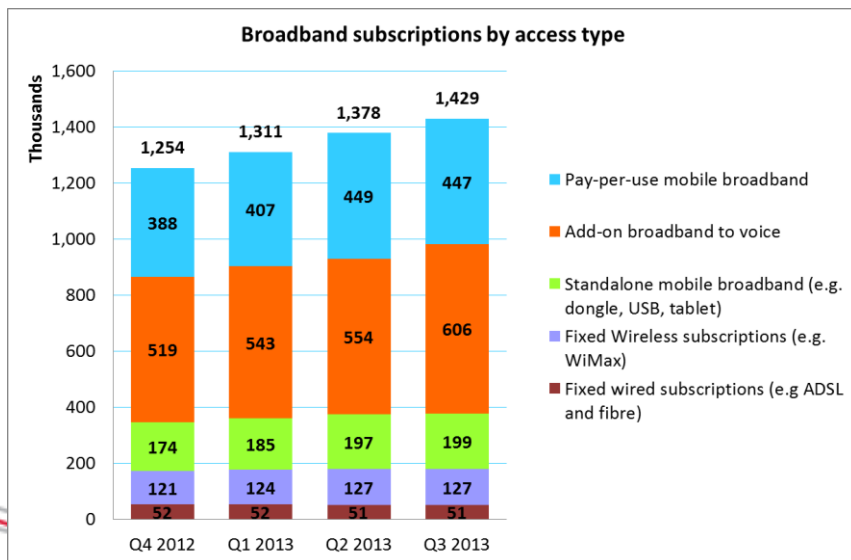
Source: TRA analysis based on operators data.

# Broadband services

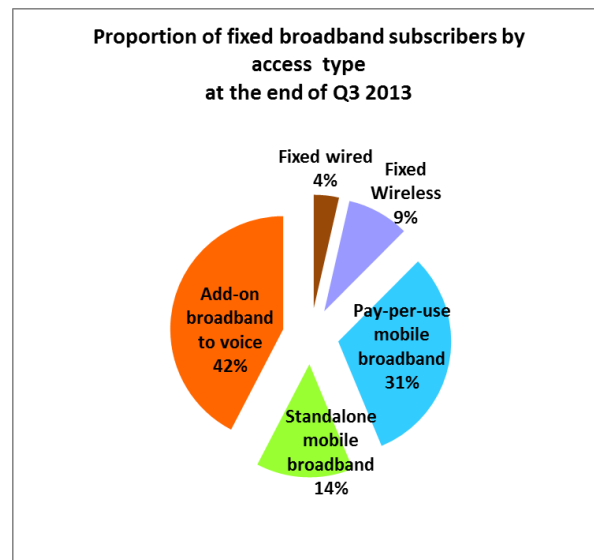
- ▶ At the end of Q3 2013, there were 1.43 million broadband subscriptions, a 3.7% increase on Q2 2013.
- ▶ Broadband subscription growth has been driven by growth in the number of mobile broadband subscriptions.
- ▶ Mobile broadband subscribers represented 87% of total broadband subscribers at the end of Q3 2013.

Broadband subscriptions		Q4 2012	Q1 2013	Q2 2013	Q3 2013	Growth Q2- Q3 2013
Fixed broadband	Fixed wired subscribers (e.g. ADSL and fiber)	52,356	51,948	51,485	51,350	-0.3%
	Fixed Wireless subscribers (e.g. WiMax)	120,820	123,783	127,269	127,066	-0.2%
Mobile broadband	(Pay-per-use) mobile-broadband	388,447	407,297	448,883	446,642	-0.5%
	Standalone mobile-broadband (e.g. dongle, USB, tablet)	173,712	184,749	196,903	198,739	0.9%
	Add-on mobile-broadband to voice	518,908	542,788	553,605	605,511	9.4%
<b>Total</b>		<b>1,254,243</b>	<b>1,310,565</b>	<b>1,378,145</b>	<b>1,429,308</b>	<b>3.7%</b>

Source: TRA analysis based on operators data.



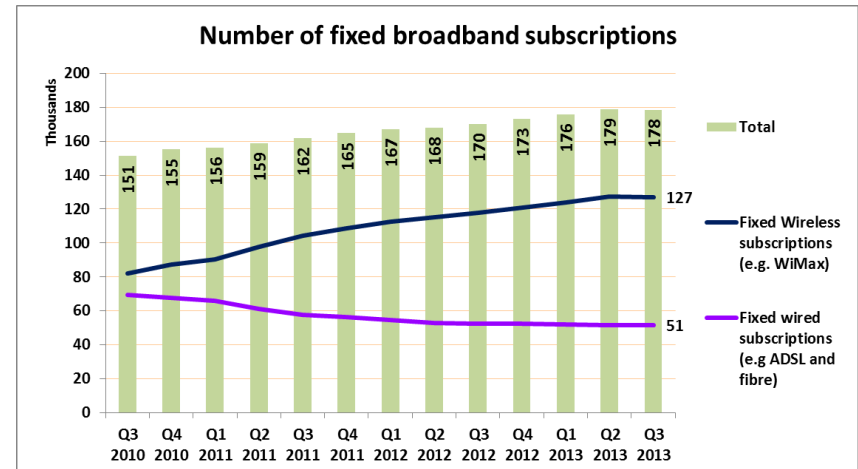
Source: TRA analysis based on operators data.



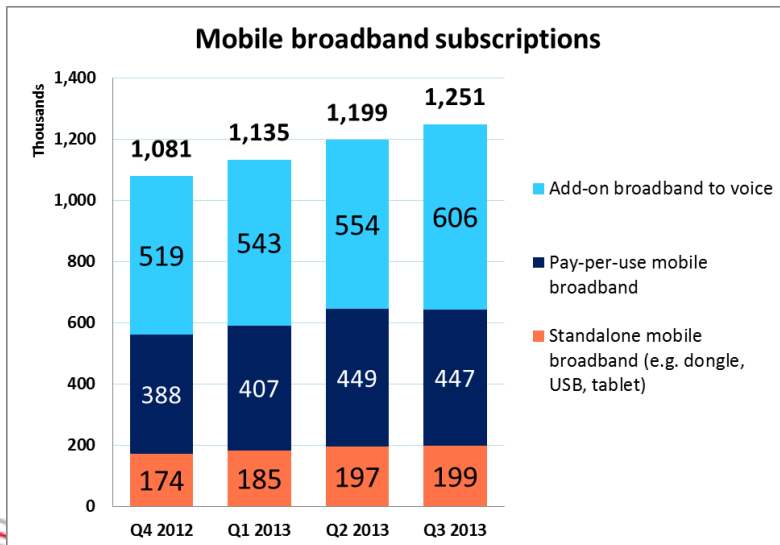
Source: TRA analysis based on operators data.

# Broadband services

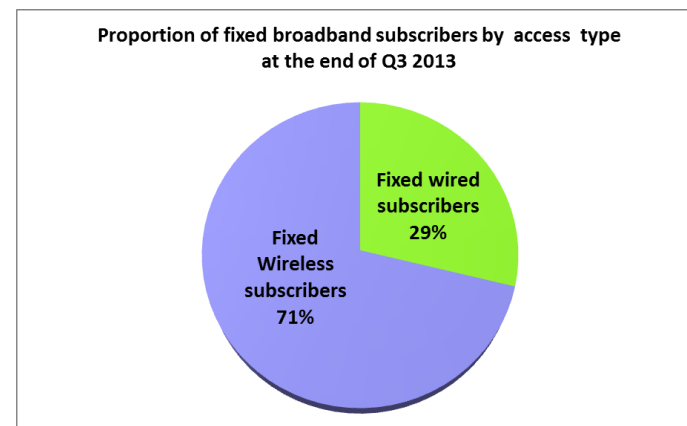
- ▶ At the end of Q3 2013, there were just over 178,000 fixed broadband subscriptions.
- ▶ At the end of Q3 2013, fixed wireless broadband subscribers represented 71% of fixed broadband subscribers (compared to 69% in Q3 2012 and 64 in Q3 2011).
- ▶ Add-on broadband to voice and pay-per-use mobile broadband represent 84% of mobile broadband subscriptions at the end of Q3 2013.



Source: TRA analysis based on operators data.



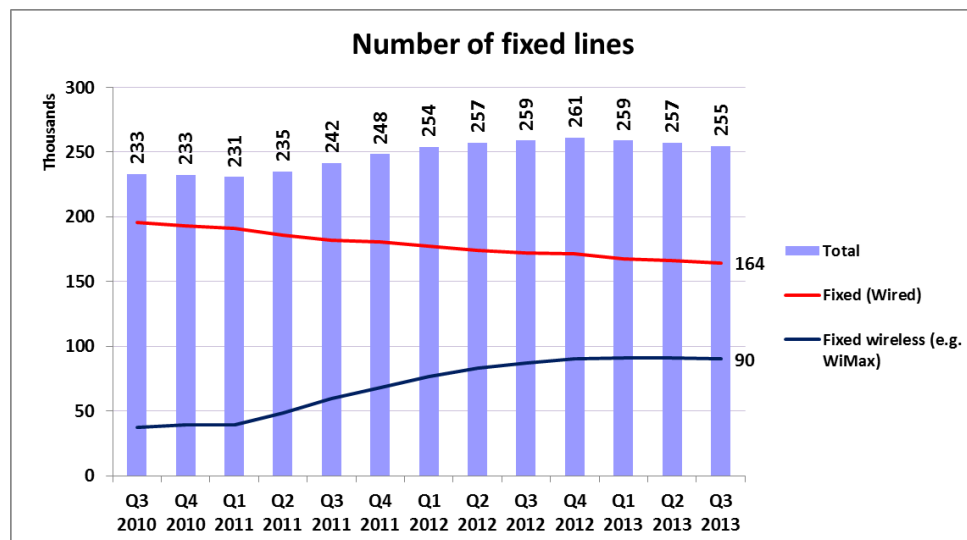
Source: TRA analysis based on operators data.



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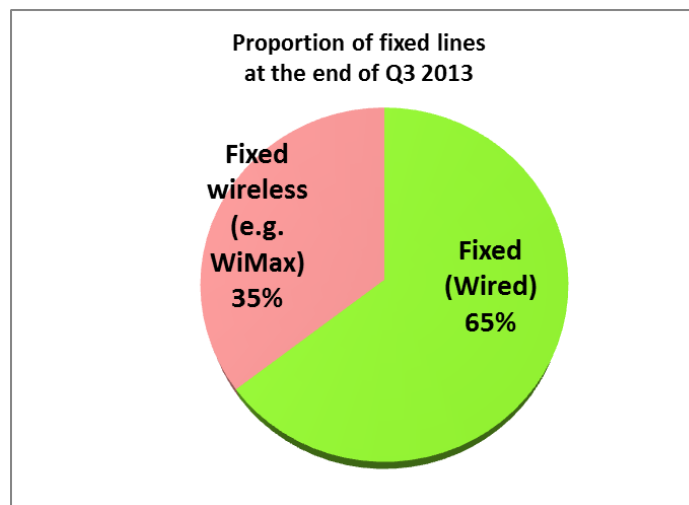
# Fixed telephony services

- ▶ At the end of Q3 2013 there were 255,000 Fixed-telephone subscriptions.
- ▶ The number of fixed (wired) telephone lines has continued to decrease in recent quarters, while the number of fixed wireless fixed telephone lines (based on WiMax) has been increasing, such growth has been slowing during 2013.
- ▶ At the end of Q3 2013, fixed wireless telephony (i.e. WiMax) represented 35% 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).



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><b>Standard mobile-broadband subscriptions (ITU code i271mb_active):</b> 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><b>Dedicated mobile-broadband subscriptions (ITU code i271md):</b> 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..!

