



Q4 2018

Quarterly Market Indicators

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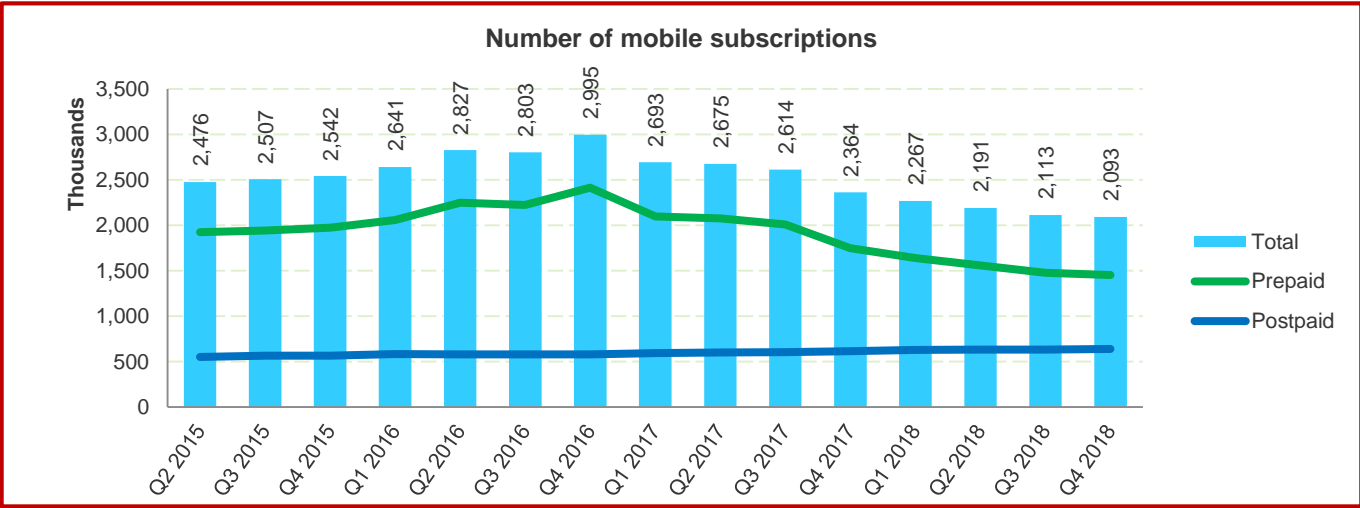
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Mobile services: Subscriptions*

- By the end of Q4 2018, Mobile subscriptions continued its decline to reach 2.09 million subscriptions; which is about a **11.5%** decrease from the end of Q4 2017.
- Mobile penetration rate declined from **158%** to **139%** by the end of Q4 2018.
- Percentage of Postpaid numbers continued to increase reaching to 31% by Q4 2018.



* Revised by IGA	2015	2016	2017	Q4 2018
Population	1,370,322	1,423,726	1,501,116	1,503,091

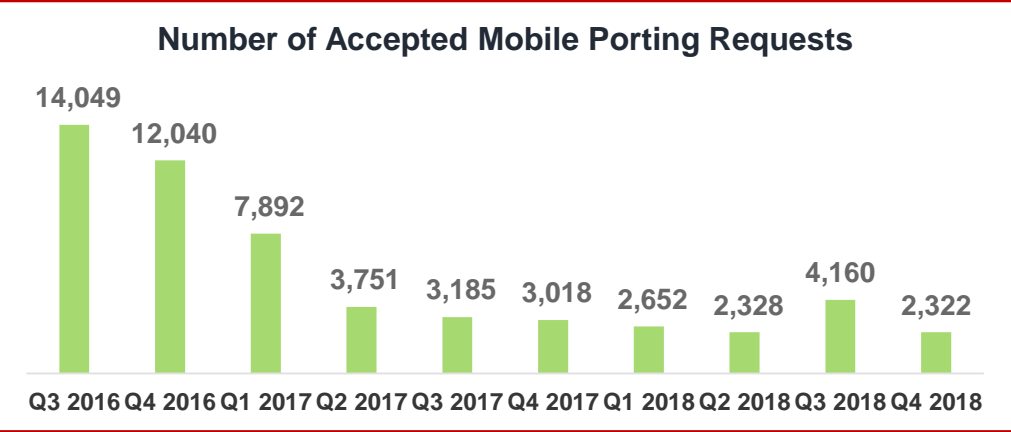
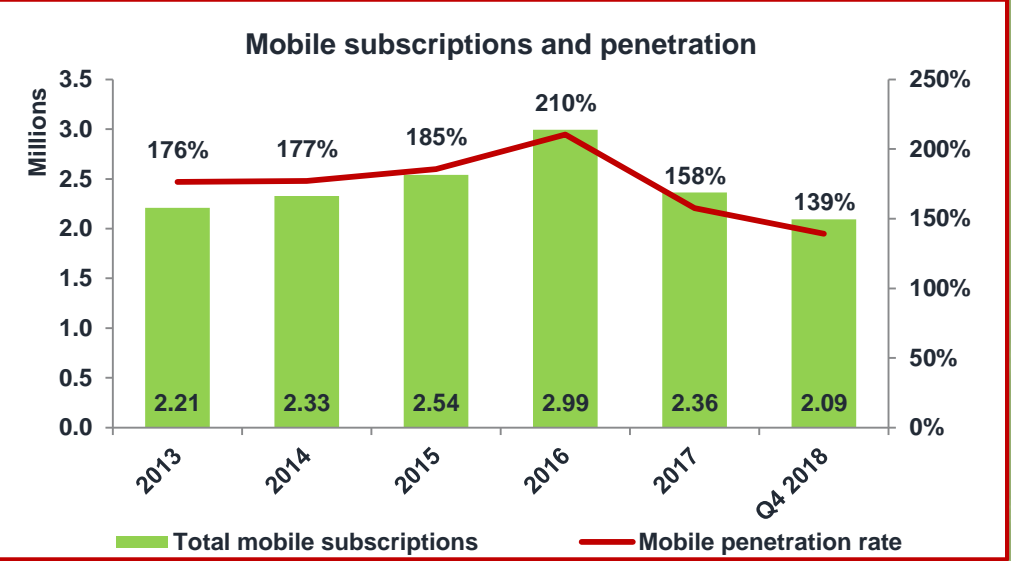
** Revised the number of accepted mobile porting requests for Q4 2017

Number of Mobile subscriptions



End of Q4 2018
2,092,714 Subscribers
139% Penetration rate

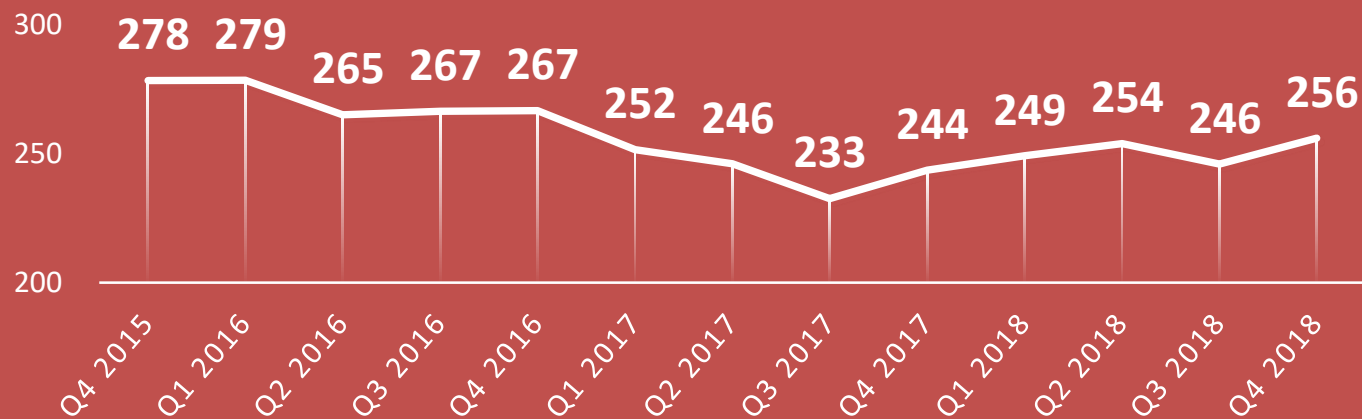
	2015	2016	2017	Q4 2018
Total	2,541,688	2,994,865	2,364,477	2,092,714
% of Prepaid	78%	81%	74%	69%
% of Postpaid	22%	19%	26%	31%



Mobile services: Traffic (Minutes)*

- Total outgoing mobile traffic decreased by **10.9%** between Q4 2017 and Q4 2018 continuing the downward trend on voice calls usage.
- The Total domestic outgoing mobile traffic decreased by **9.6%** (123.5 million minutes) in Q4 2018 compared to Q4 2017, whereas the total international mobile outgoing voice traffic decreased by **14%** (72 million minutes).
- Prepaid voice traffic as a percentage decreased to **52%** of total domestic traffic while Postpaid traffic reached **48%**.
- Average Monthly minutes per user increased by **5%** driven by decrease in subscribers.

Average Monthly Minutes Per User (Domestic-International)



* Revised number of minutes

Total Outgoing Traffic in Minutes (Domestic + International)

△ (10.9%)



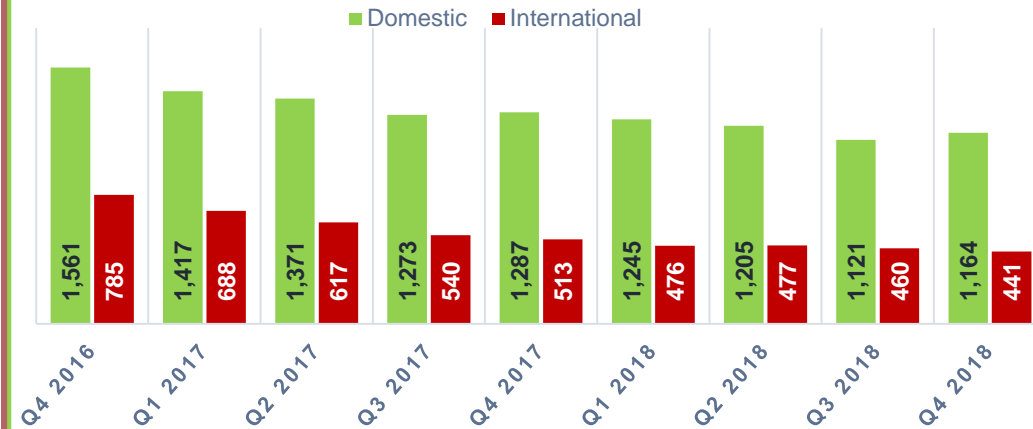
Q4 2017

1,800,632,348

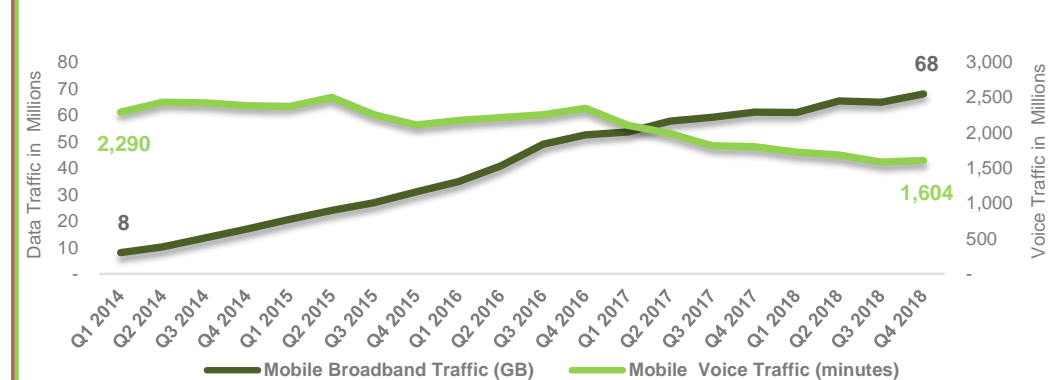
Q4 2018

1,604,483,153

TOTAL OUTGOING MOBILE VOICE TRAFFIC IN MILLIONS OF MINUTES (DOMESTIC-INTERNATIONAL)*

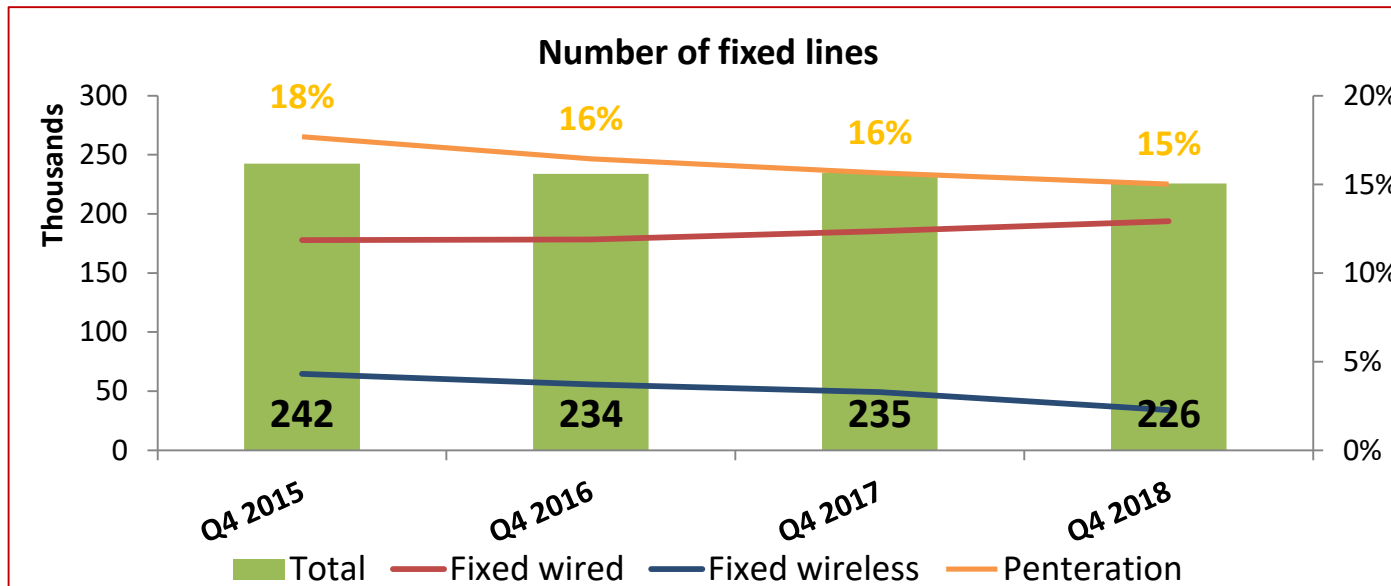


Mobile Voice Traffic Vs Mobile Broadband Data Traffic



Fixed telephony services: Subscriptions (PSTN & Wireless)*

- Between Q4 2017 & Q4 2018, Fixed telephony subscriptions has decreased by **3.8%**
- The fixed-wired telephony services continue to increase, as it has recorded an increase of **6,286** subscriptions between Q4 2017 to Q4 2018.
- On the other hand, fixed-wireless service has decreased by **15,236** subscriptions between Q4 2017 to Q4 2018.



*The number of OLO's subscriptions are estimated for 2018. The number of fixed telephony were revised in for 2017 subscriptions.

*The number of Fixed telephony for Q2 2018 was revised by an operator.

Number of fixed telephony subscriptions

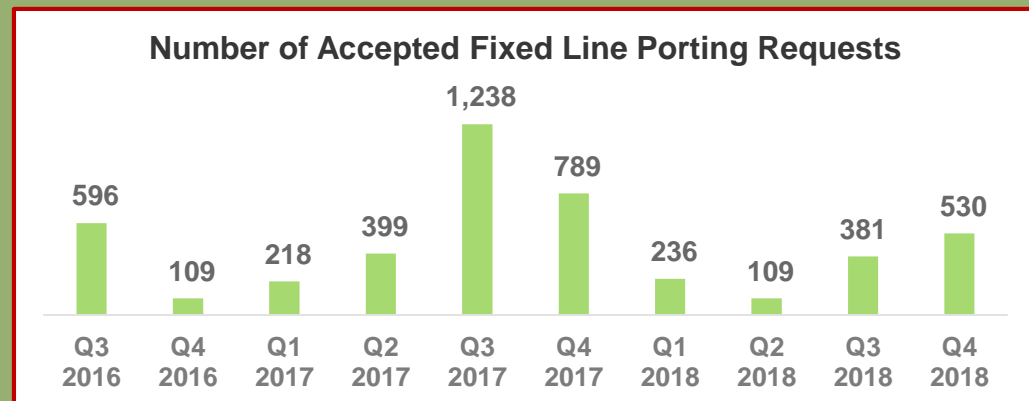
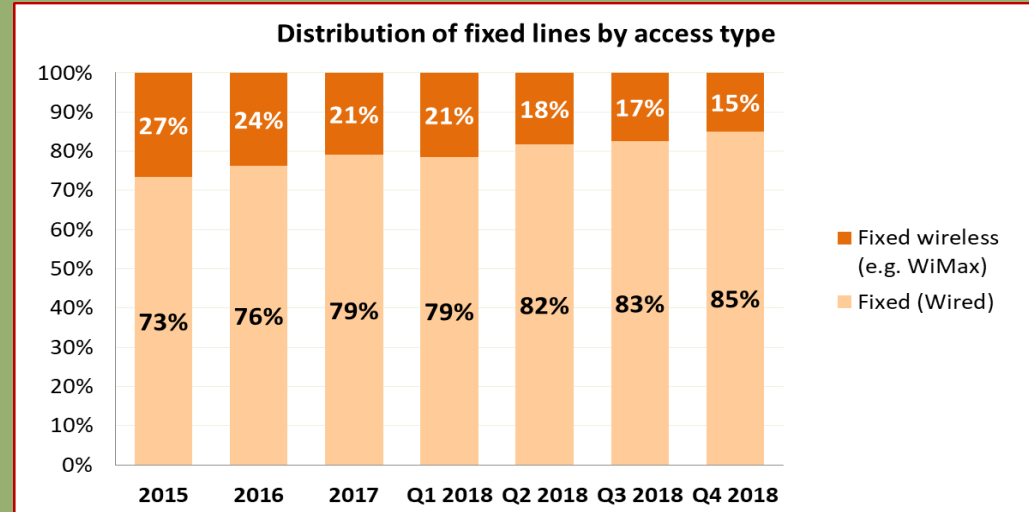


End of Q4 2018
225,759
15% Penetration rate



End of Q4 2017
234,709
16% Penetration rate

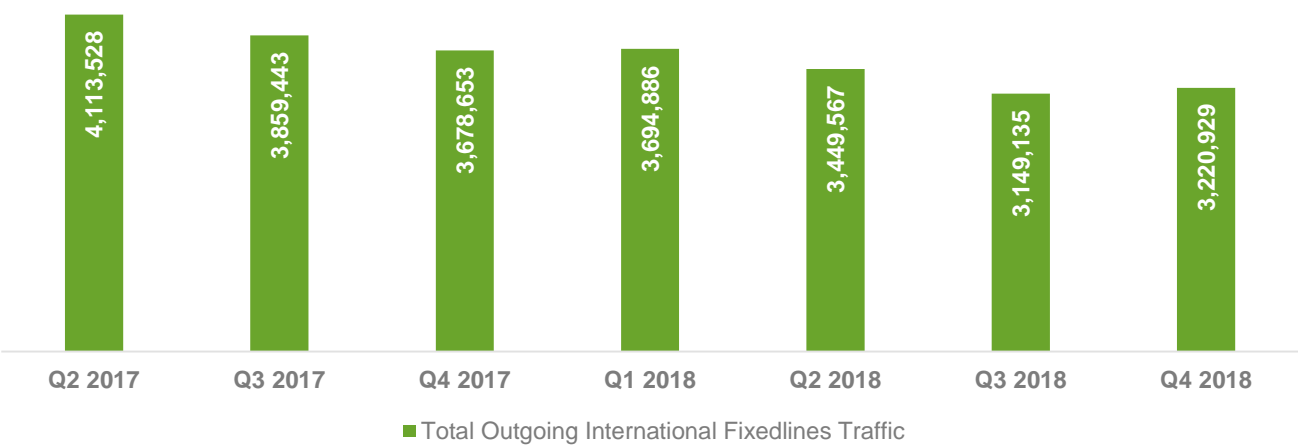
	2015	2016	2017	Q4 2018
Total	242,439	233,917	234,709	225,759
% of Fixed Wired	73%	76%	79%	85%
% of Fixed Wireless	27%	24%	21%	15%



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

- Domestic fixed telephony traffic showed an upward trend as traffic has increased between Q4 2017 & Q4 2018 by **5.67%**, an increase of **1.79 Million** minutes.
- The monthly average outgoing minutes per subscription increased to **145** minutes in Q4 2018 compared to 135 minutes in Q4 2017.
- Fixed International outgoing calls (Including ISDN) have decreased by **12%**.

Total Outgoing International Fixedlines Traffic*



Total fixed domestic outgoing traffic in minutes

△ (5.67%)



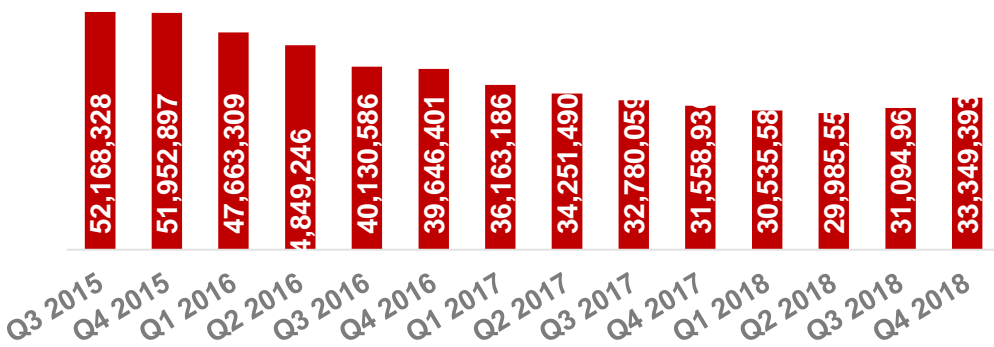
Q4 2017

31,558,936

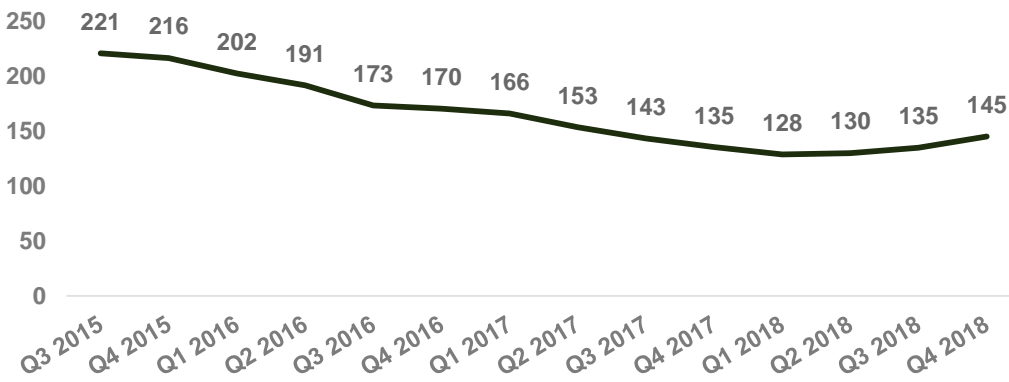
Q4 2018

33,349,393

Fixed Line Total Domestic Outgoing Traffic (Minutes)**



Average Outgoing Domestic Minutes Per Subscription

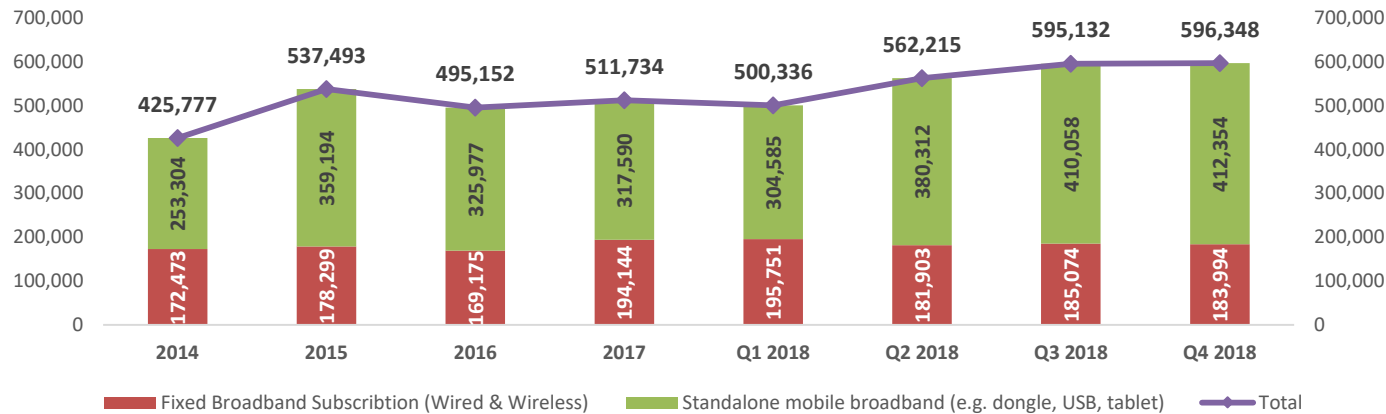


* ISDN international traffic was re-added to total international outgoing minutes
** The OLO's traffic was revised
*** Domestic traffic was revised in Dec 2018 due to an operator revision

Broadband services: Subscriptions

- At the end of Q4 2018, there were about 2.1 million broadband subscriptions, a decrease of **8.9%** compared to end of 2017, and a decrease of **14,395** compared to Q3 2018.
- Broadband penetration stayed stable at **144%** at the end of Q4 2018.
- Broadband services subscription from a fixed location has increased by **0.2%** between Q3 2018 & Q4 2018 while mobile broadband subscription stayed stable over the same period.
- Add-on broadband to voice and pay-per-use mobile broadband represent 67.9% of mobile broadband subscriptions at the end of Q4 2018. In addition, **75%** of mobile subscribers have data.

Broadband services subscriptions from a fixed location
(Dedicated Broadband)**



Number of broadband subscriptions

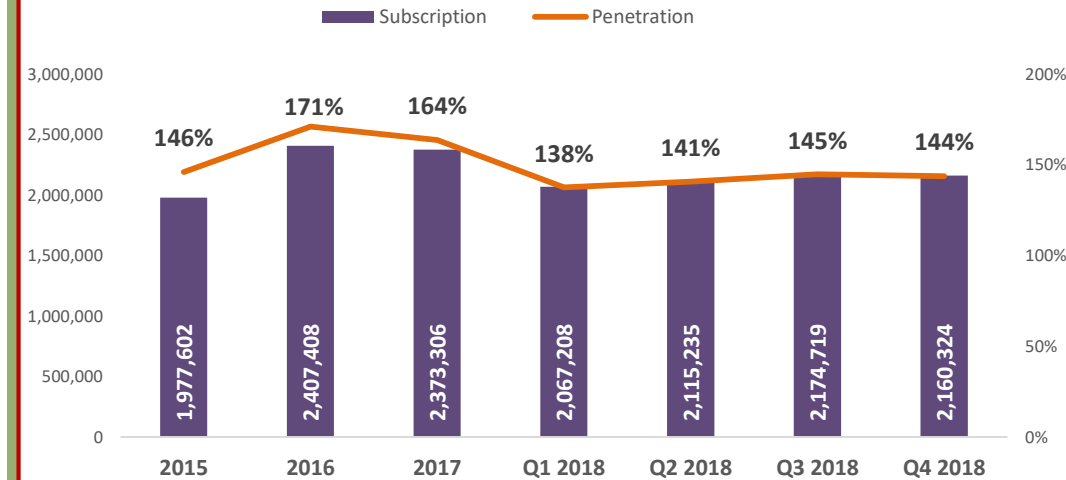


End of Q4 2018

2,160,324

144% Penetration rate

Broadband Subscriptions and Penetration**



Mobile Broadband – Q4 2018



Pay-per-use
11.2%

Standalone
20.9%

Add-on to voice
67.9%

Proportion of broadband subscriptions by access type – Q4 2018



8.5%

91.5%

■ Fixed broadband (wired+wireless) ■ Mobile broadband

* The number of OLO's subscriptions' are estimated for 2017 and 2018.

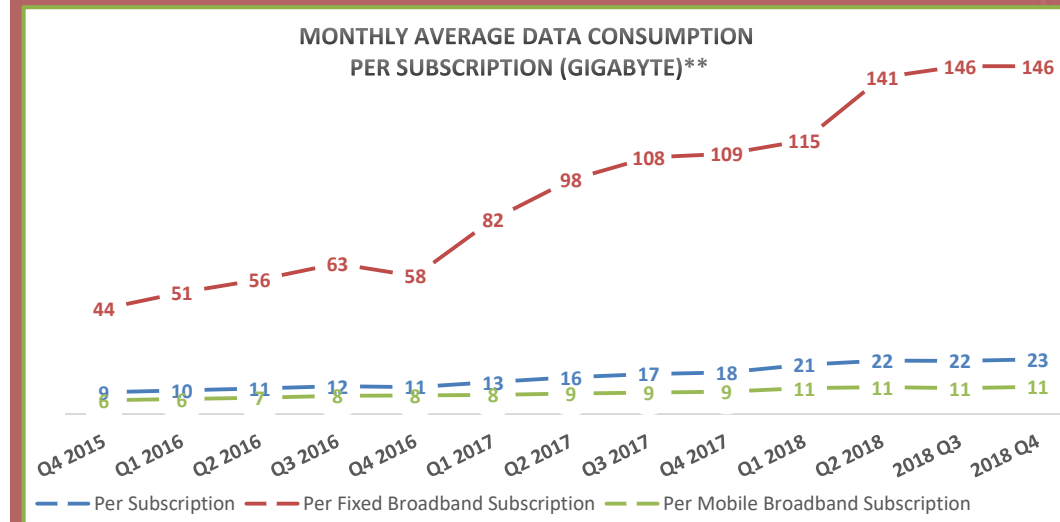
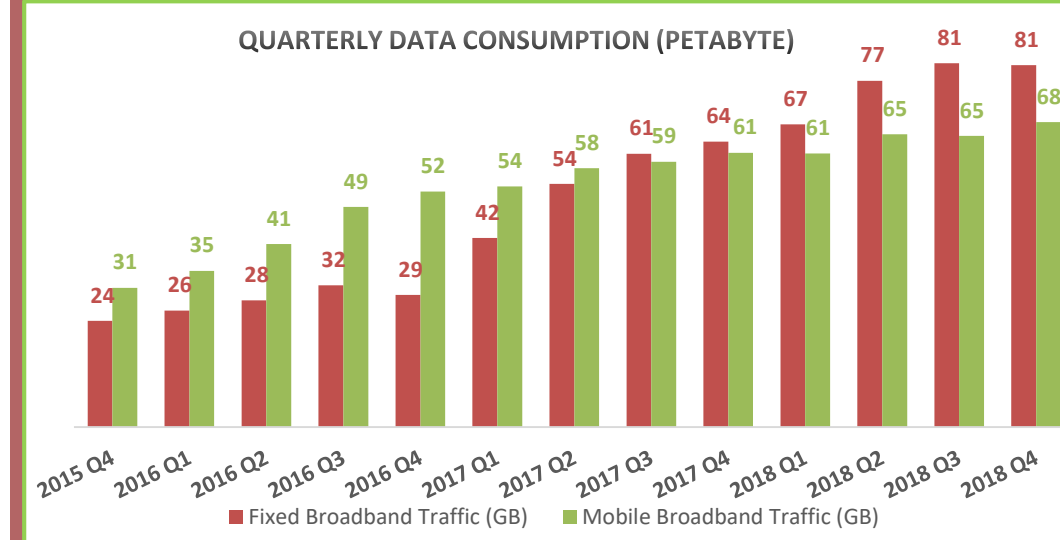
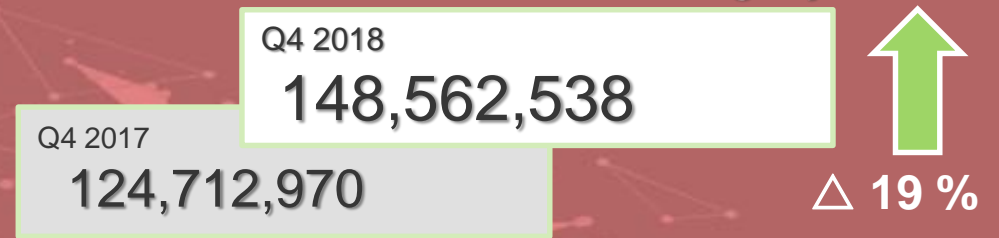
** Revised in Dec 2018 for 2018 year

Broadband services: Data Traffic*

- The upward trend in data consumption is continuing to grow as data traffic reached to 124 PB in Q4 2018, an increase of **19%** over the year from Q4 2017.
- Year-on-Year, Mobile broadband traffic has increased by **11.4%** while Fixed broadband traffic has increased by **26.6%**.
- The monthly average mobile broadband traffic per mobile subscription remained at 7 GB compared to the monthly average fixed broadband traffic per fixed subscription which increased to **146 GB**.
- Overall, the monthly average traffic per user remained at 19 GB.

* The OLO's traffic (data usage) is estimated for 2018
 ** Revised number of subscribers in Dec 2018

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>



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