

Quarterly Market Indicators

Q4 2019

Content

Disclaimer	Page 3
Mobile services	Page 5
Fixed line telephony services	Page 7
Broadband services	Page 9
Definitions	Page 11

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Market Indicators Snapshot for Q4 2019

Mobile subscribers:
2,070,710

Average minutes
per month per
mobile subscription:
222 minutes

Penetration:
138%



Fixed-
telephony
subscribers:
225,797

Domestic monthly
average minutes
per line:
129 minutes

Penetration:
15%



Mobile Prepaid subscribers:
1,399,670

% of Prepaid of Mobile Market:
67.59%



Fixed Wired Telephony Subscribers:
88.10%
Fixed Wireless Telephony Subscribers:
11.90%

Mobile Postpaid subscribers:
671,040

% of Postpaid of Mobile Market:
32.41%



International Outgoing minutes:

From mobile: 354,425,134

From fixed telephony: 1,261,876



2.35 Million
broadband subscriptions

156.6%
Broadband Penetration Rate



187 Petabyte
Total Data Usage

Avg. Traffic per
subscription per
month:
26.5 GB

112 Petabyte
Fixed Broadband
Traffic

Avg. Fixed Traffic per
month:
182.7 GB

74.5 Petabyte
Mobile Broadband
Traffic

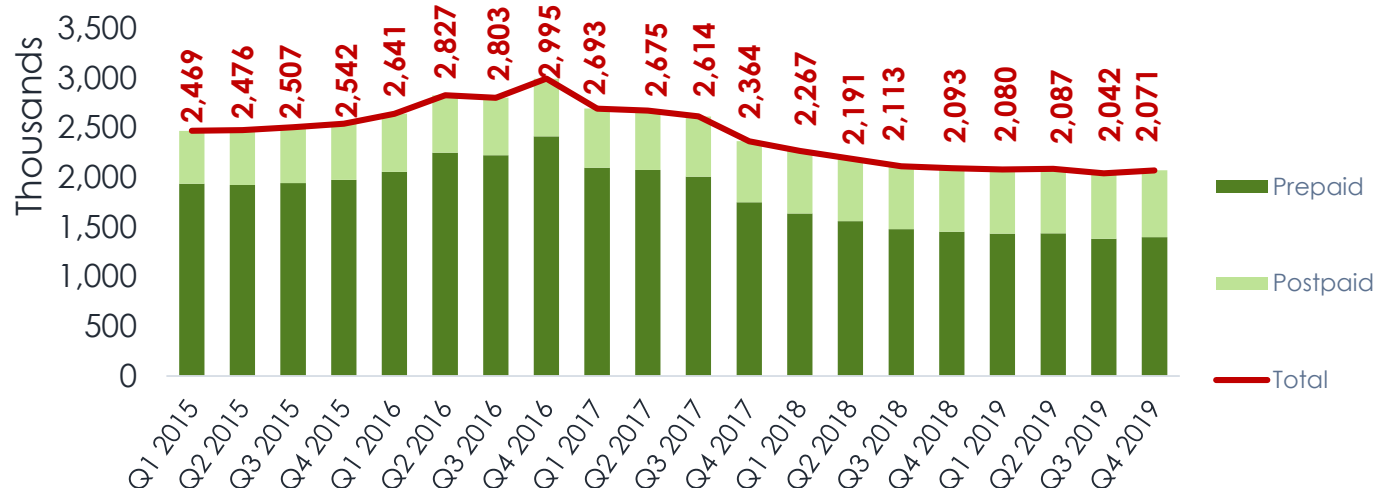
Avg. Mobile Traffic
per month:
11.6 GB



Mobile services: Subscriptions

- ☉ The growth trend in mobile postpaid subscriptions continued as postpaid subscriptions increased from **639,209** at the end of 2018 to **671,040** at the end of Q4 2019, a **5%** increase.
- ☉ On the other hand, mobile prepaid subscriptions is declining from **1,453,505** at the end of 2018 to **1,399,670** at the end of Q4 2019, a **3.7%** decline.
- ☉ Overall, total subscriptions remained somewhat stable over the last two years. Penetration rates were also stable over the period.
- ☉ Number of accepted ported mobile lines increased from **2,322** in Q4 2018 to **7,714** in Q4 2019.

Number of mobile subscriptions



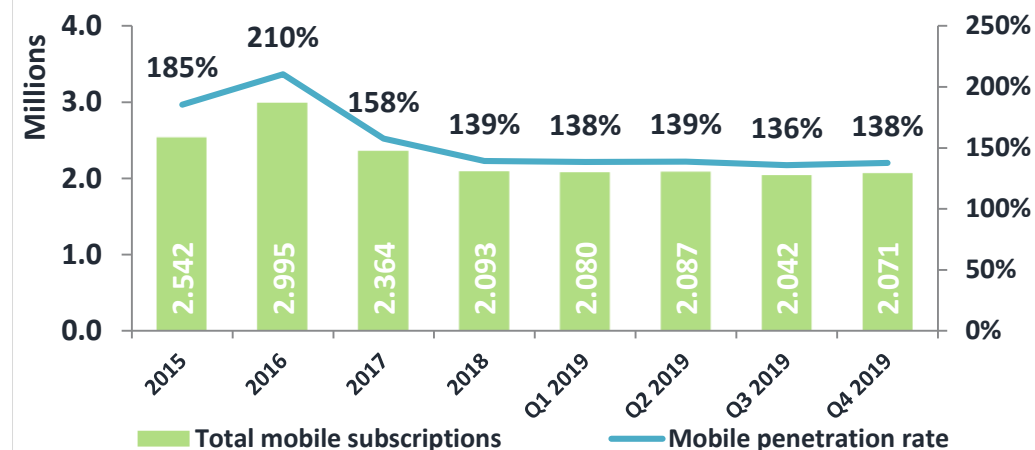
Population	2015	2016	2017	2018	Q4 2019
By IGA	1,370,322	1,423,726	1,501,116	1,503,091	1,503,091



Number of Mobile subscriptions (End of Q4 2019)
2,070,710 Subscriptions
 138% Penetration rate

	2016	2017	2018	Q4 2019
Total	2,994,865	2,364,477	2,092,714	2,070,710
% of Prepaid	80.60%	73.94%	69.46%	67.59%
% of Postpaid	19.40%	26.06%	30.54%	32.41%

Mobile subscriptions and penetration

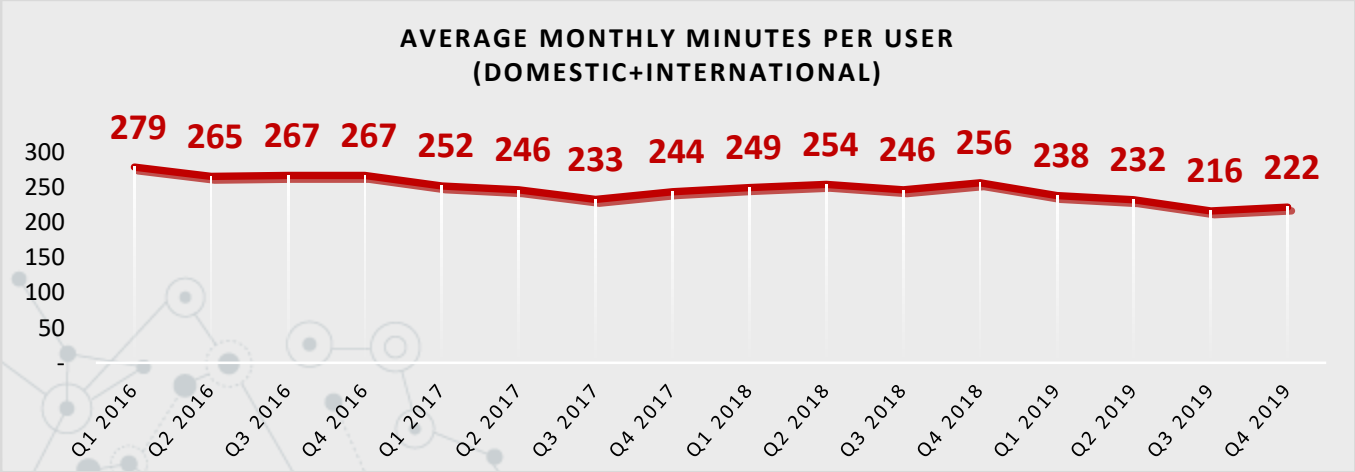


NUMBER OF ACCEPTED MOBILE PORTING REQUESTS



Mobile services: Traffic (Minutes)

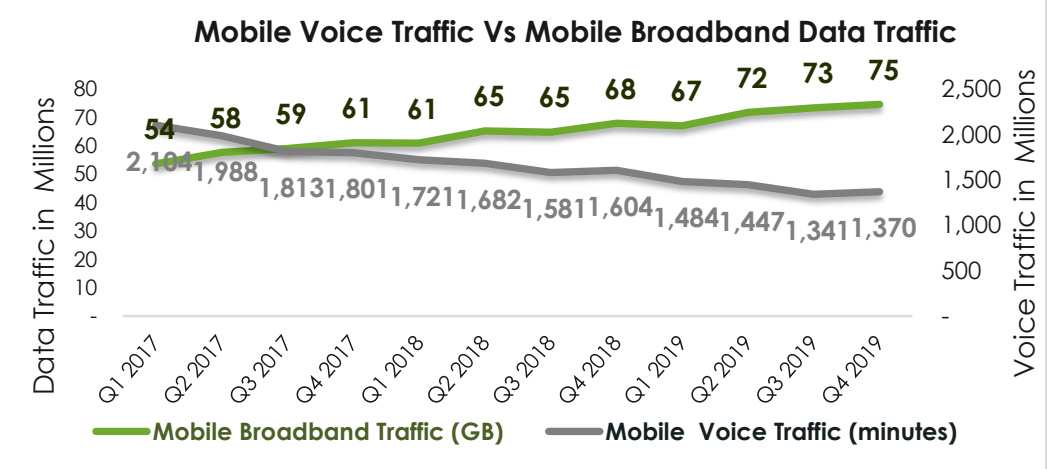
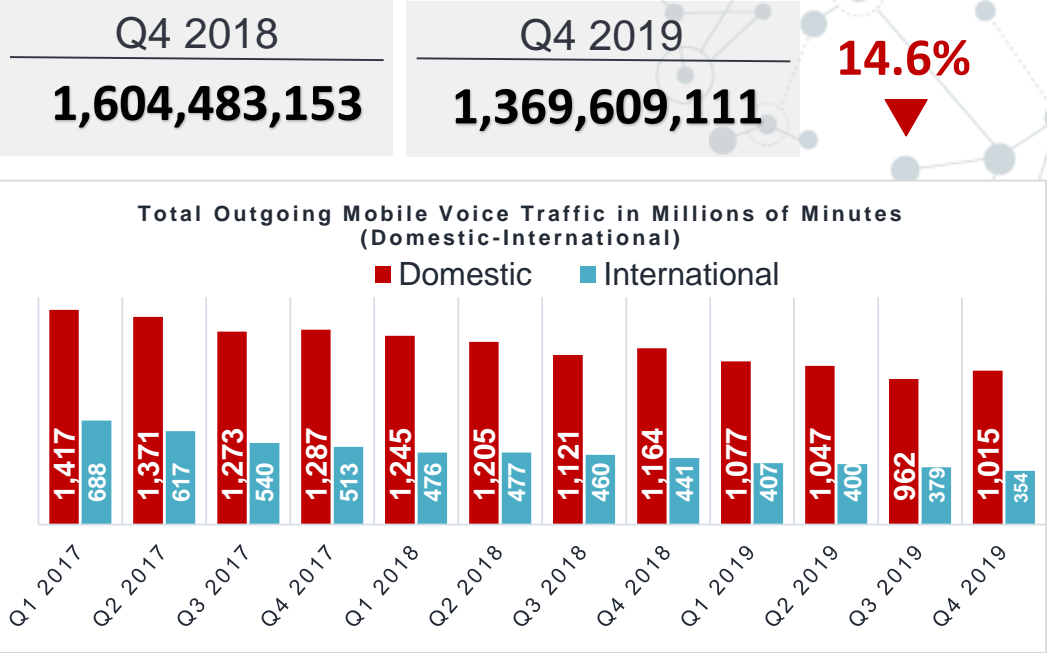
- Between Q4 2018 & Q4 2019, total mobile outgoing minutes decreased by **14.64%**.
- Domestic mobile prepaid outgoing minutes declined by **18.9%** while domestic mobile postpaid minutes declined by **6.2%**. Overall, total domestic minutes declined by **12.77%**.
- For mobile international outgoing minutes, prepaid minutes declined by **19.54%** while postpaid minutes declined by **20.81%**. Overall, mobile International outgoing minutes declined by **19.58%**.
- Average monthly minutes per user decreased to **222** minutes compared to **256** minutes in Q4 2018. However, Average monthly minutes have increased compared to Q3 2019. That number comprises average domestic monthly minutes per subscribers of **164** and average international monthly minutes by subscriber of **57**.



* Revised for 2019 data



Total Outgoing Traffic in Minutes (Domestic + International)*



Fixed telephony services: Subscriptions (PSTN & Wireless)

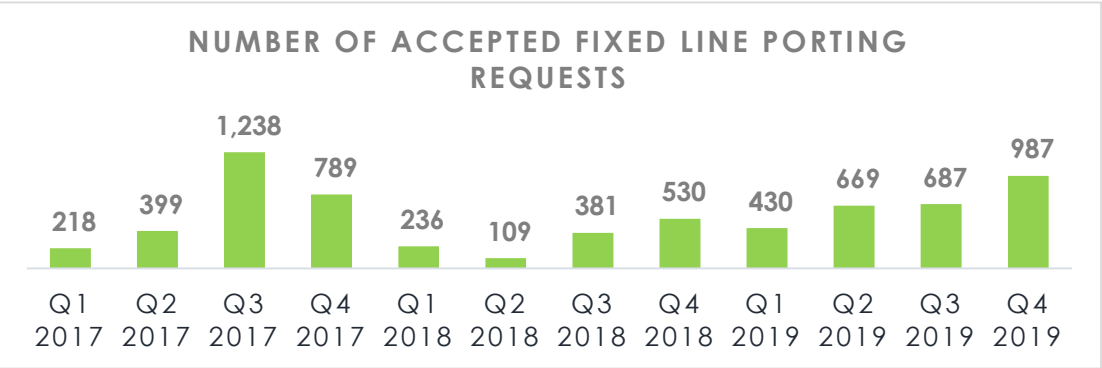
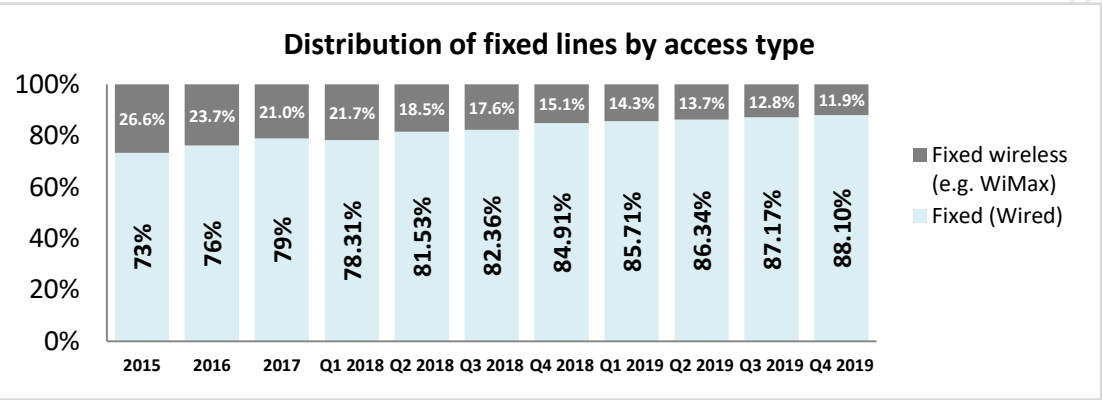
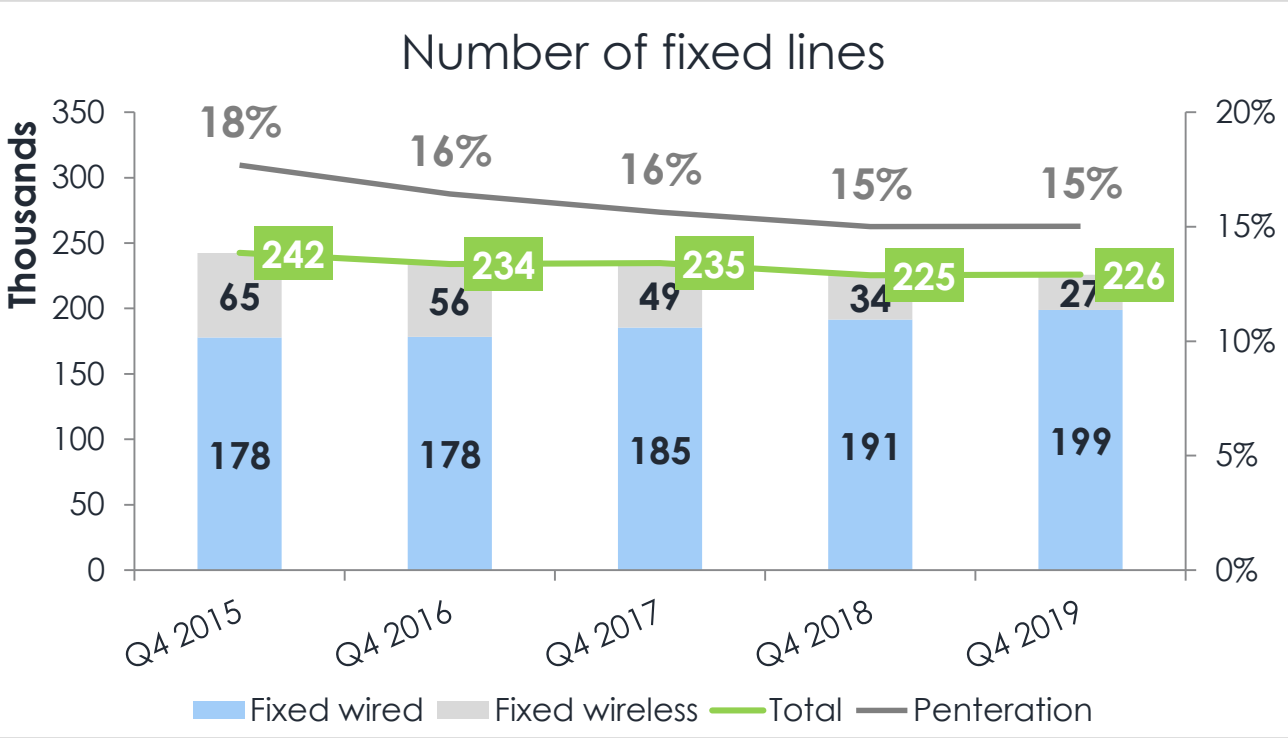


No. of fixed telephony subscriptions

⦿ Since the beginning of 2019, fixed telephony subscriptions increased by 0.14%. Fixed wired subscriptions increased by 3.9% while fixed wireless subscriptions decreased by 21%.

⦿ Number of ported fixed lines increased from 530 in Q4 2018 to 987 in Q4 2019.

<div>End of Q4 2018</div> <div>225,479</div> <div>15% Penetration rate</div>		<div>End of Q4 2019</div> <div>225,797</div> <div>15% Penetration rate</div>		
	2016	2017	2018	Q4 2019
Total	233,917	234,709	225,479	225,797
% of Fixed Wired	76.26%	79.01%	84.91%	88.1%
% of Fixed Wireless	23.74%	20.99%	15.09%	11.9%



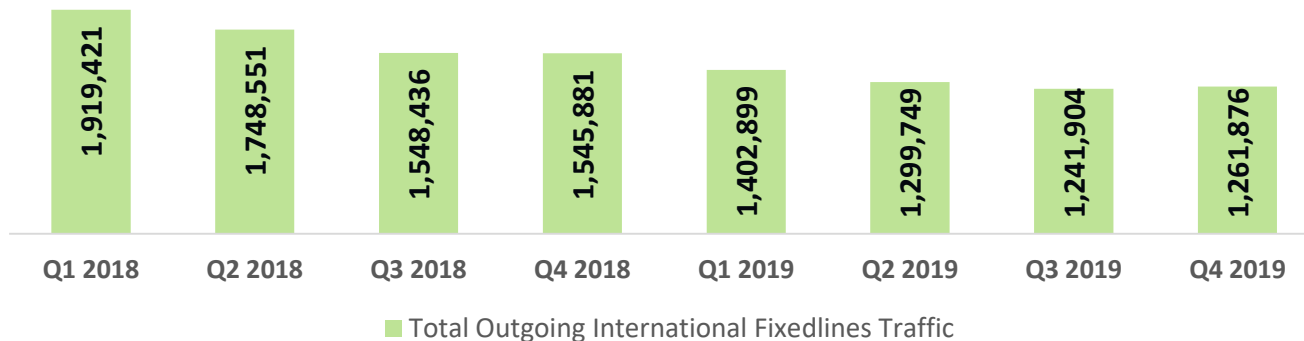
Fixed telephony services: Traffic (PSTN & Wireless - Minutes)

Overall, fixed telephony domestic traffic declined by **12.7%** between Q4 2018 and Q4 2019.

However, fixed telephony international traffic has decreased by **18.37%** over the period between Q4 2018 & Q4 2019.

Average monthly outgoing domestic minutes per subscriber decreased to **129** compared to **147** minutes in Q4 2018 while average monthly international minutes slightly decreased to **6** minutes per subscriber compared to **7** minutes in Q4 2018.

Total Outgoing International Fixedlines Traffic



* International Outgoing Minutes originated from ISDN traffic is not included in the chart above

** Revised for 2019 data



Total fixed domestic outgoing traffic in minutes**

Q4 2018

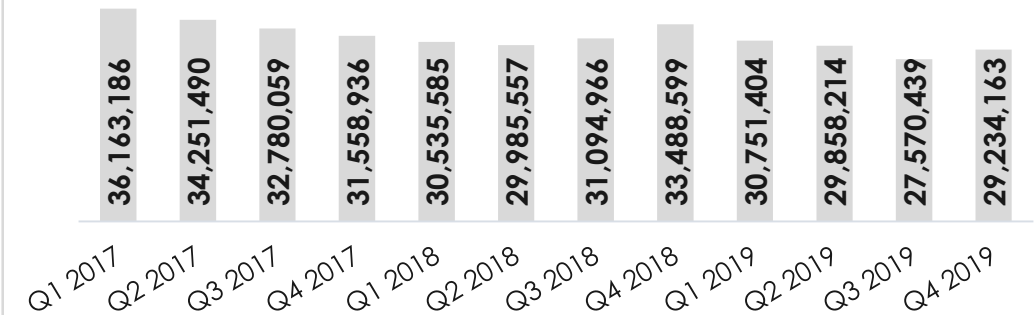
33,488,599

Q4 2019

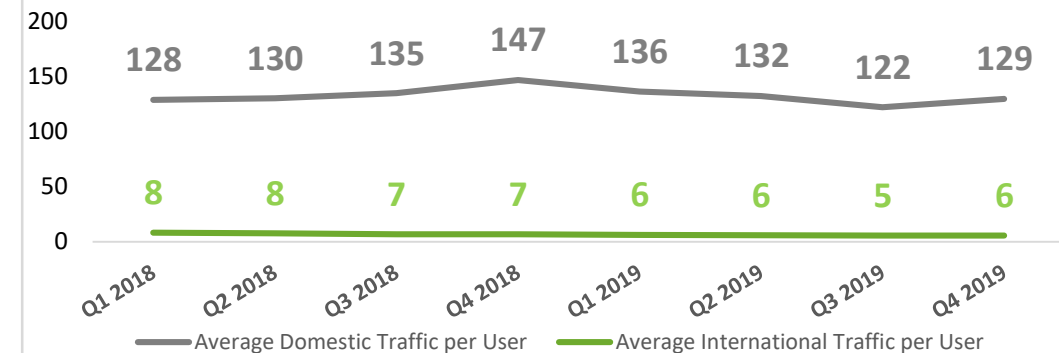
29,234,163

12.7%

Fixed Line Total Domestic Outgoing Traffic (Minutes)



Average Outgoing Domestic & International Minutes Per Subscription



Broadband services: Subscriptions

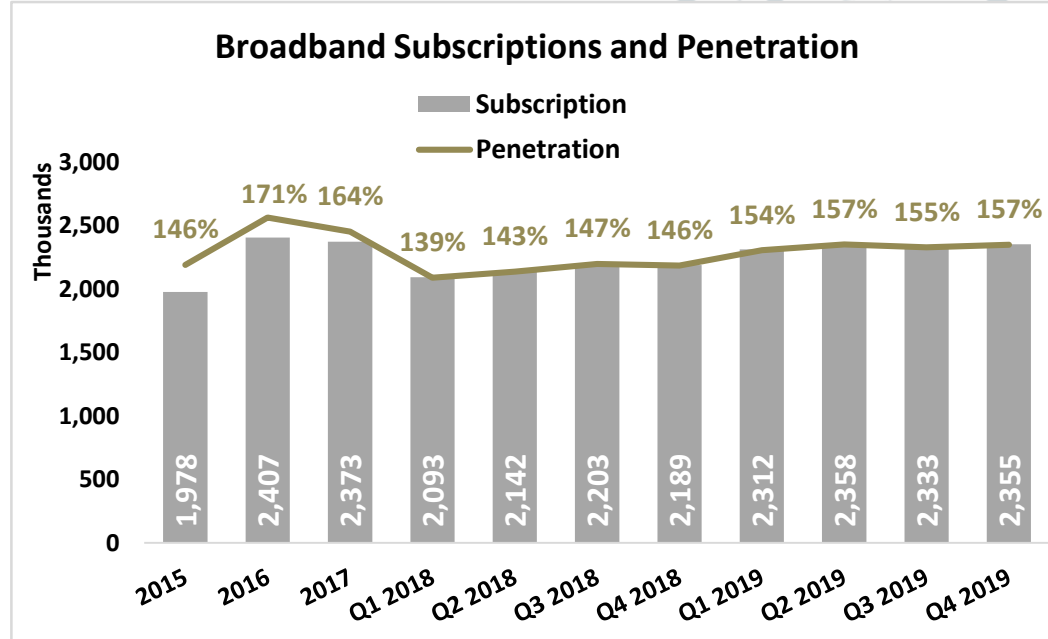
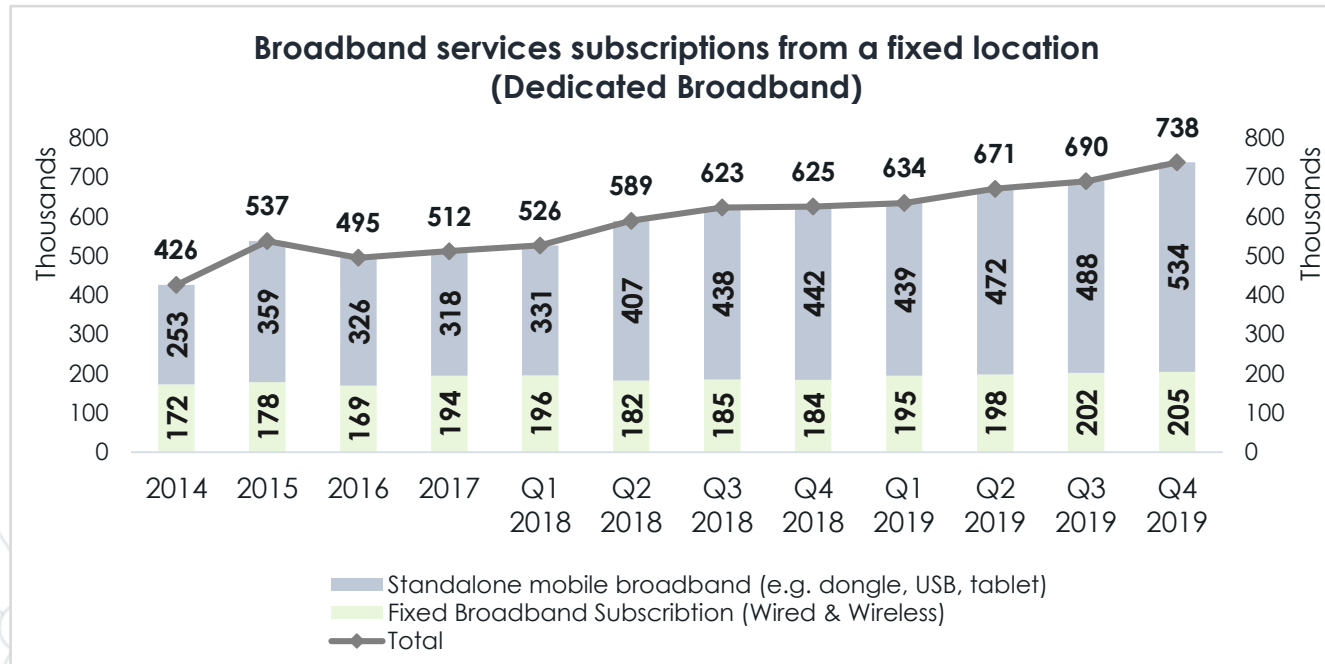
📶 Broadband penetration reached **156.6%** and between Q4 2018 & Q4 2019 broadband subscription increased by **7.5%**.

📶 In Q4 2019 Fixed wired broadband subscription increased by **14.3%** while fixed wireless increased by **7%** compared to Q4 2018.

📶 Overall, mobile broadband subscription increased by **7%**, while at the same time, standalone broadband subscription increased by **20.8%**.



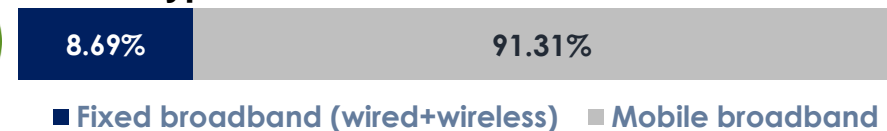
No. of broadband subscriptions (End of Q4 2019)*
2,354,538
156.6% Penetration rate



Mobile Broadband – Q4 2019

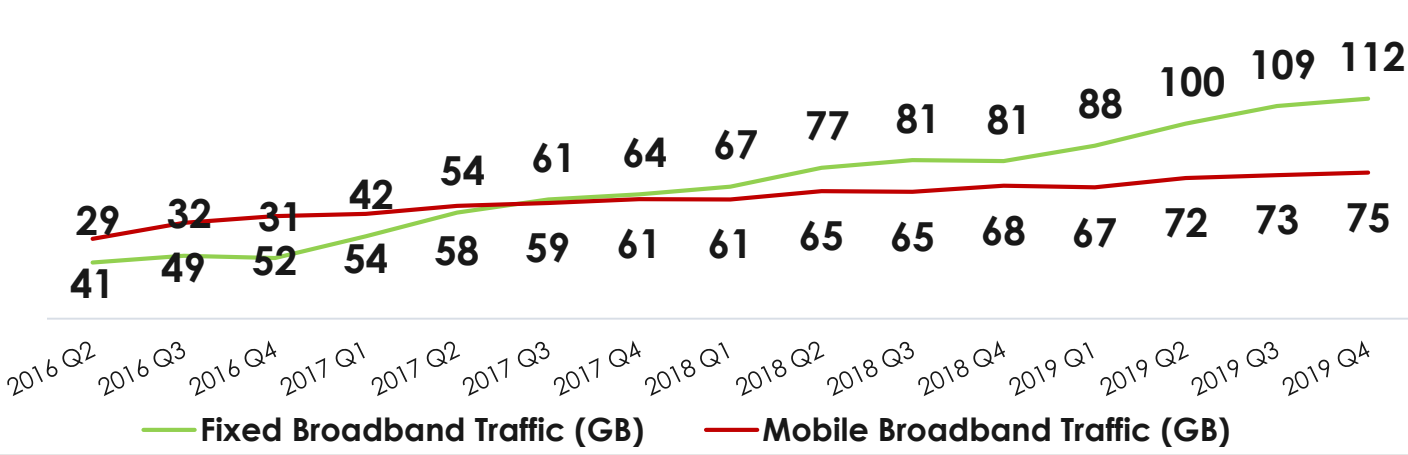


Proportion of broadband subscriptions by access type – Q4 2019

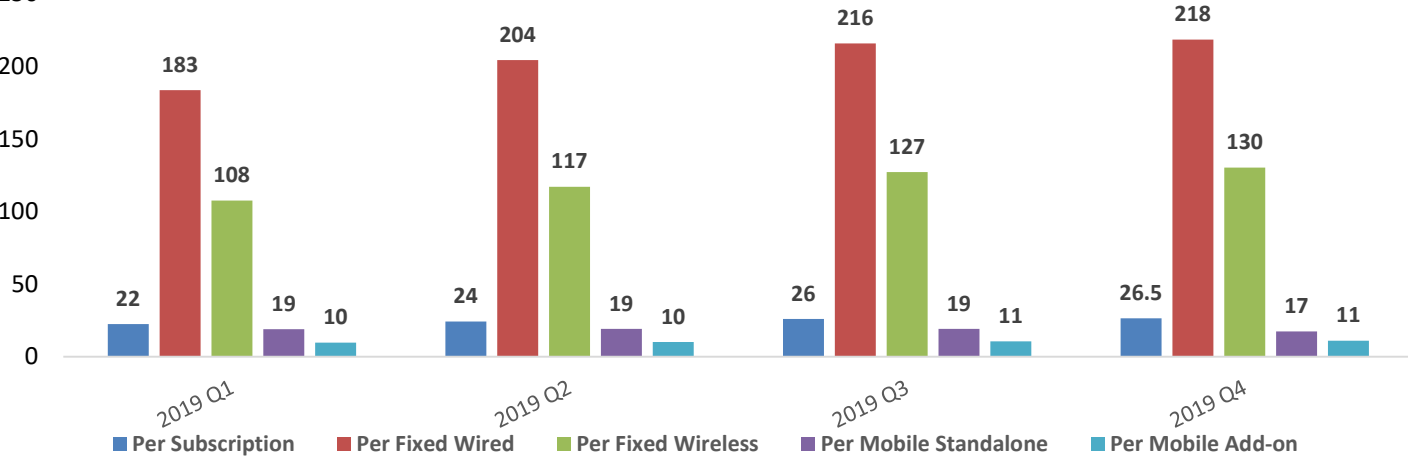


Broadband services: Data Traffic*

Quarterly data consumption (Petabyte)



Monthly Average data consumption per subscription (Gigabyte)



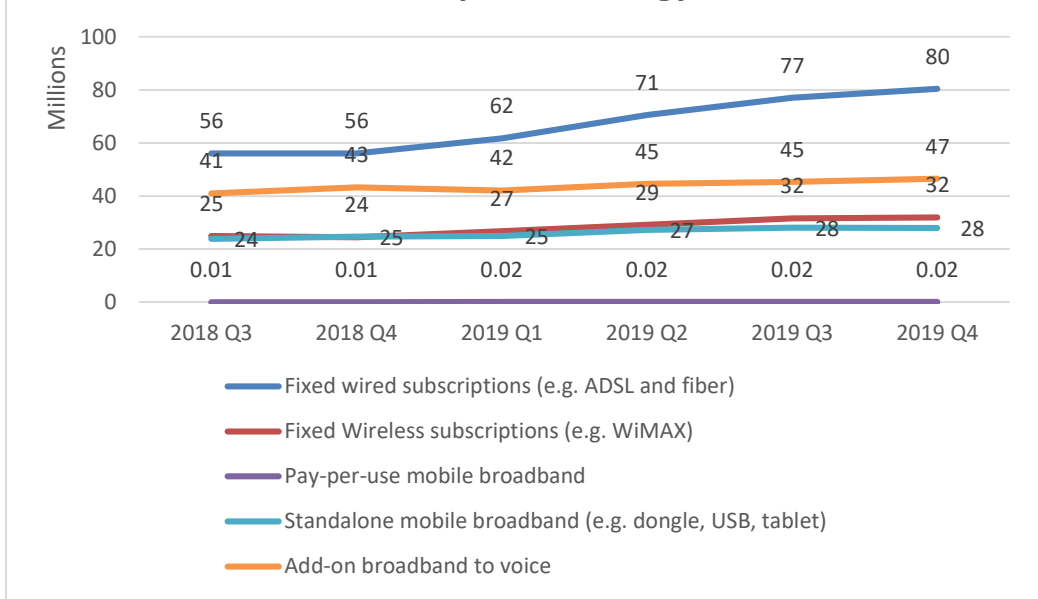
* Fixed wired data traffic was revised for Q1, Q2 and Q3 2019



Total data traffic in Gigabyte

Q4 2018	Q4 2019	
148,562,538	186,951,119	▲ 25.8%

Traffic per technology



🎯 At the end of Q4 2019, Data consumption stood at **187** petabyte, an increase of around **26%** compared to the same period last year.

🎯 Fixed Broadband traffic increased by **39.4%** over the same period last year while mobile data consumption increased by **9.7%**.

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

