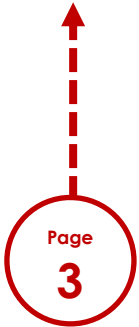


Quarterly Market Indicators

Q1 2020

Content

Disclaimer



Mobile services



Fixed line
telephony services



Broadband services



M2M Subscribers
& Traffic



Definitions



Disclaimer

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Main Market Indicators for Q1 2020



Mobile subscribers:
1,847,352

Penetration:
124%

Average minutes per
month per mobile
subscription:
238

Average data usage
per mobile broadband
subscription:
17.4 GB



Mobile Prepaid
subscribers:
1,300,143

% of Prepaid of Mobile
Market:
70.38%



Mobile Postpaid
subscribers:
547,209

% of Postpaid of Mobile
Market:
29.62%



Fixed-telephony
subscribers:
225,760

Penetration:
15%

Domestic **monthly**
average minutes per
line:
38



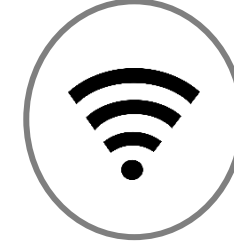
Fixed Wired Telephony
subscribers:
89.01%

Fixed Wireless
Telephony subscribers:
10.99%



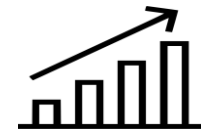
International Outgoing
Minutes (Mobile):
338,118,064

International Outgoing
Minutes (Fixed telephony):
1,205,291



Broadband
subscriptions:
2,111,405

Broadband
penetration rate:
142%



Total Data Usage:
223.6 Petabyte

Avg. Traffic per
broadband
subscription per
month:
35.3 GB

Fixed Broadband
Traffic:
119.9 Petabyte

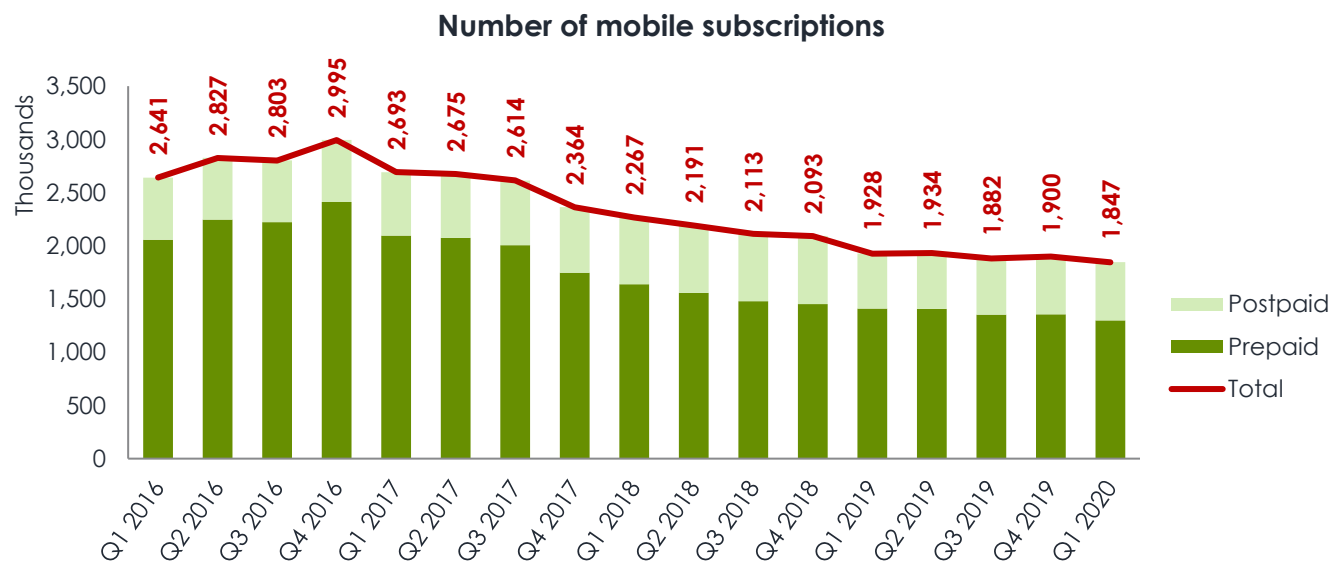
Avg. Fixed
Broadband Traffic
per month:
274.7 GB

Mobile
Broadband Traffic:
103.7 Petabyte

Avg. Mobile
Broadband Traffic
per month:
17.6 GB

Mobile services: Subscriptions

- Between the end of 2019 and Q1 2020, mobile subscriptions decreased by 2.7%.
- On the other hand, Postpaid subscribers increased for the same period by 1% while Prepaid subscribers declined by 4.3%.
- Penetration rate declined to 124% at the end of Q1 2020 from 126% at the end of 2019.
- Number of accepted ported mobile lines dropped from **7,714** by the end of 2019 to **3,479** in Q1 2020.

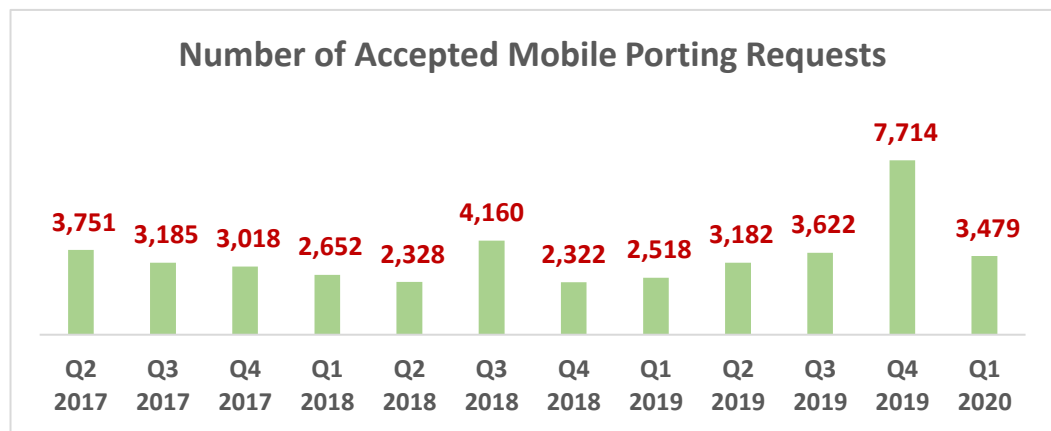
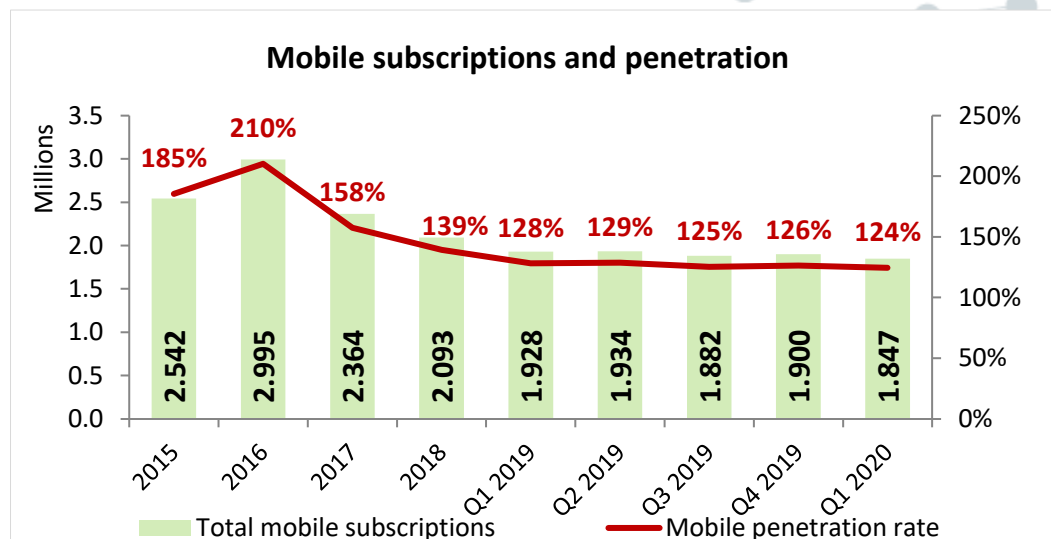


Population	2015	2016	2017	2018	2019
By IGA	1,370,322	1,423,726	1,501,116	1,503,091	1,484,756



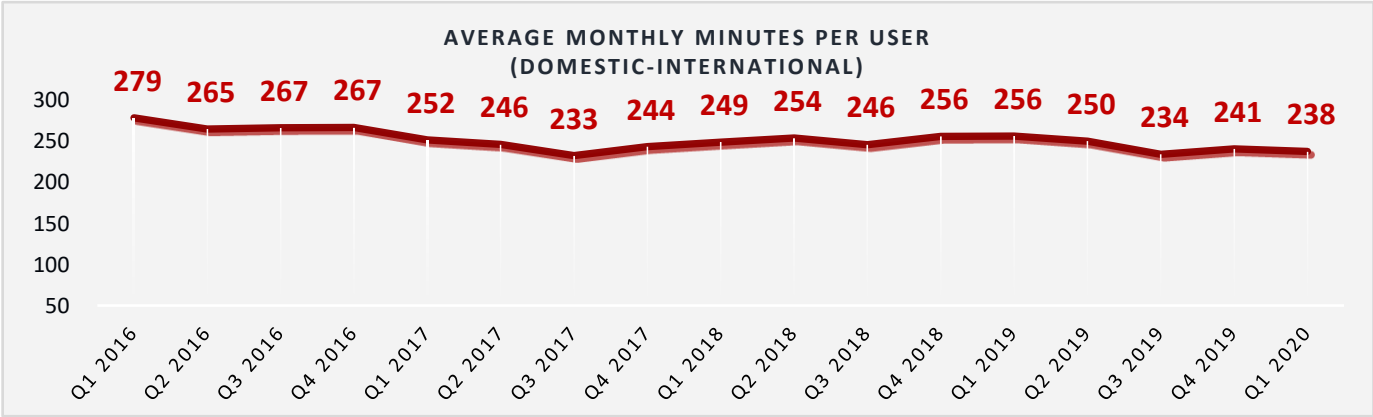
Number of Mobile subscriptions (End of Q1 2020)
1,847,352 Subscriptions
 124% Penetration rate

	2017	2018	2019	Q1 2020
Total	2,364,477	2,092,714	1,900,361	1,847,352
% of Prepaid	73.94%	69.46%	71.50%	70.38%
% of Postpaid	26.06%	30.54%	28.50%	29.62%



Mobile services: Traffic (Minutes)

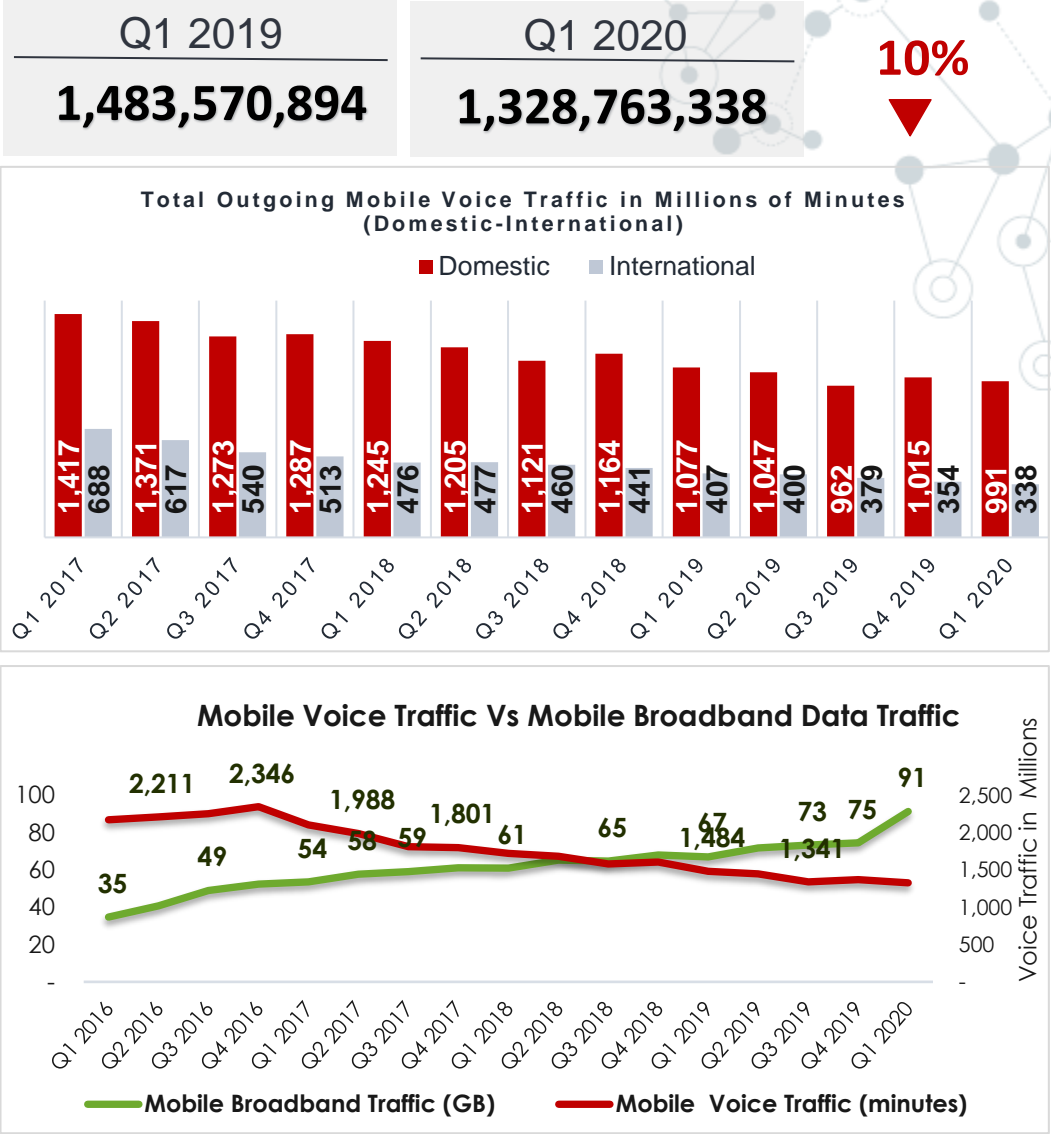
- Between Q1 2019 & Q1 2020, total mobile outgoing minutes decreased by **10%**.
- For the same period, Domestic mobile prepaid outgoing minutes declined by **14.6%** while domestic mobile postpaid minutes declined by **1.5%**. Overall, total domestic minutes declined by **8%**.
- Between Q1 2019 & Q1 2020, mobile international outgoing minutes, prepaid minutes declined by **16.5%** while postpaid minutes declined by **27.8%**. Overall, mobile International outgoing minutes declined by **17%**.
- Average monthly minutes per subscription decreased to **238** minutes in Q1 2020 compared to **256** minutes in Q1 2019. That number comprises average domestic monthly minutes per subscribers of **177** and average international monthly minutes by subscriber of **60**.



* Revised for 2019 data



Total Outgoing Traffic in Minutes (Domestic + International)*



Fixed telephony services: Subscriptions (PSTN & Wireless)



No. of fixed telephony subscriptions

Between Q1 2019 and Q1 2020, fixed telephony subscriptions slightly dropped by **0.3%**. Fixed wired subscriptions increased by **3.5%** while fixed wireless subscriptions decreased by **23.7%**.

Number of ported fixed lines increased from **430** in Q1 2019 to **555** in Q1 2020.

End of Q1 2019

226,571

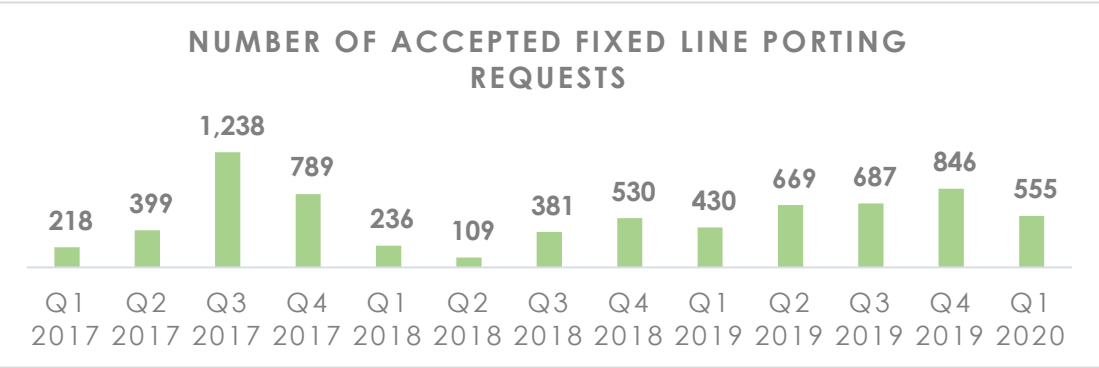
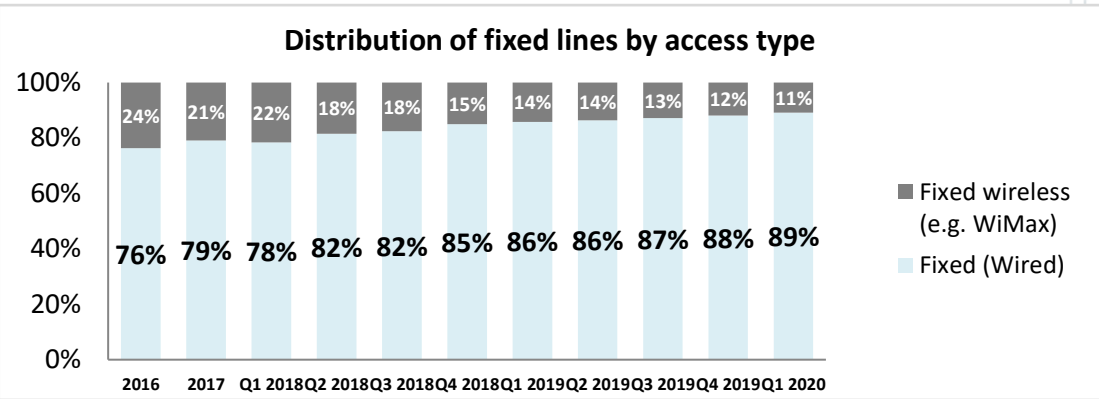
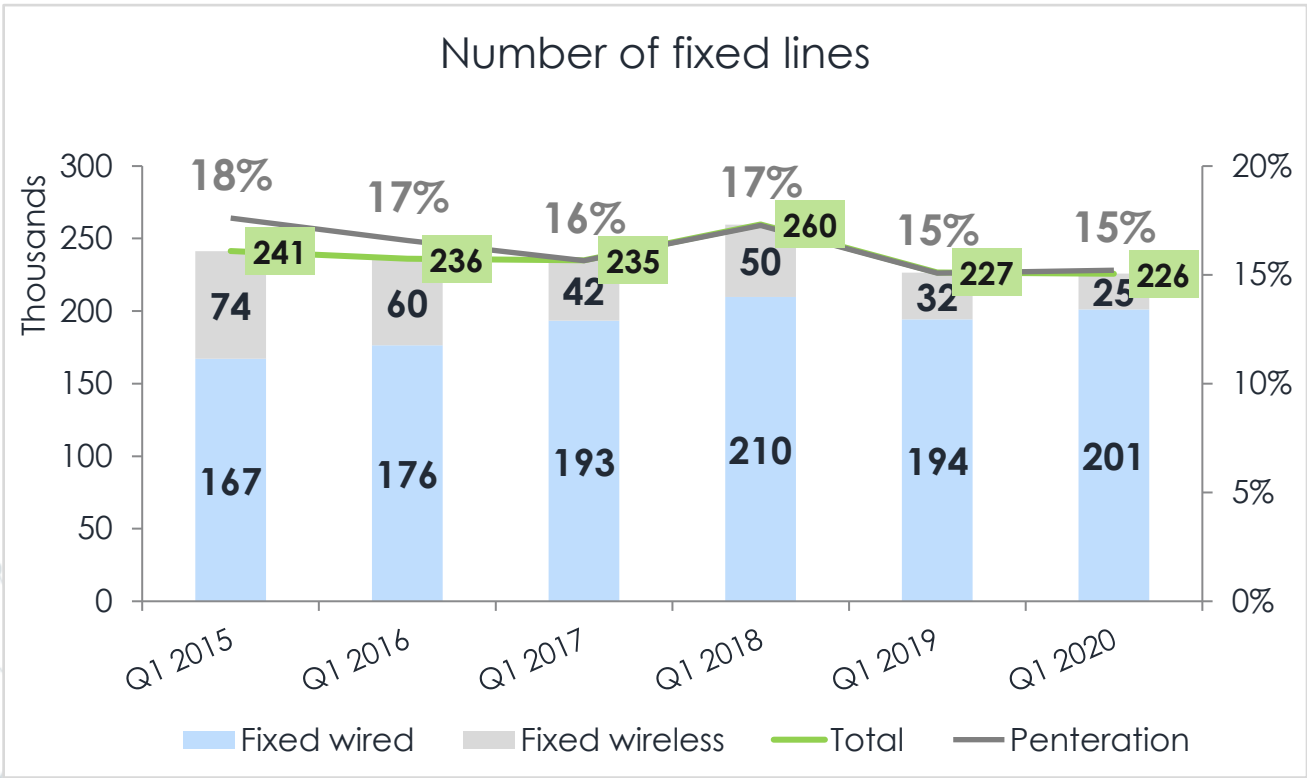
15% Penetration rate

End of Q1 2020

225,890

15% Penetration rate

	2017	2018	2019	Q1 2020
Total	234,709	225,479	225,797	225,890
% of Fixed Wired	79.01%	84.91%	88.1%	89.06%
% of Fixed Wireless	20.99%	15.09%	11.9%	10.94%

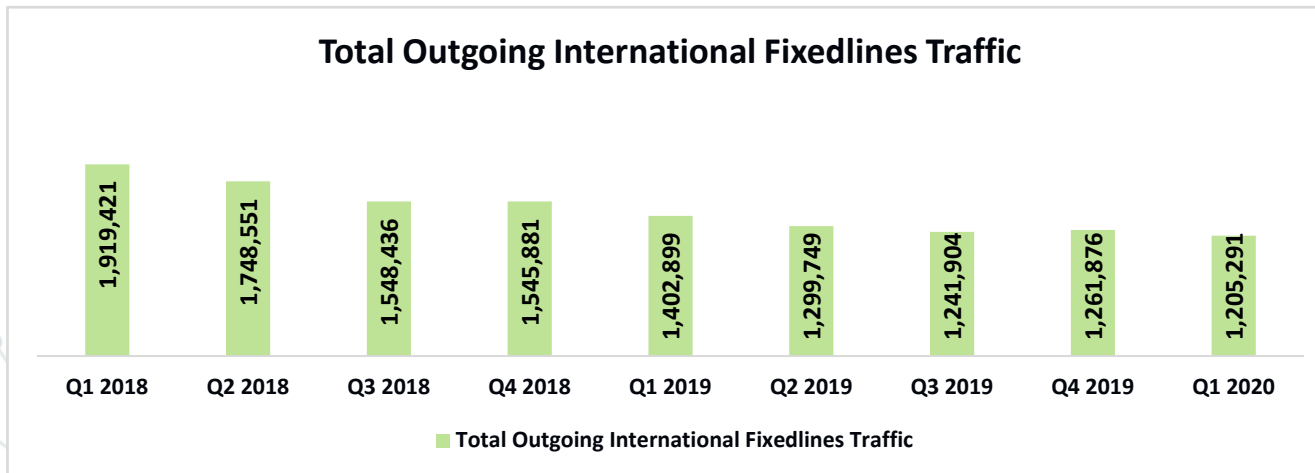


Fixed telephony services: Traffic (PSTN & Wireless - Minutes)

Overall, fixed telephony domestic traffic declined by **16%** between Q1 2019 and Q1 2020.

Similarly, fixed telephony outgoing international traffic has decreased by **14%** over the period between Q1 2019 & Q1 2020.

Average quarterly outgoing domestic minutes per subscriber decreased to **114** in Q1 2020 compared to **136** minutes in Q1 2019 while average quarterly international minutes slightly dropped to **5** minutes per subscriber compared to **6** minutes in Q1 2019.



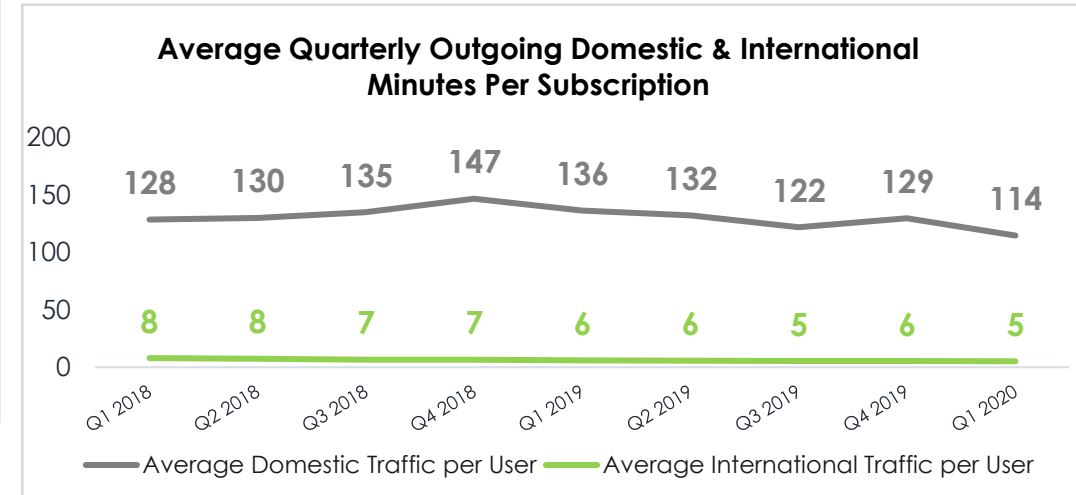
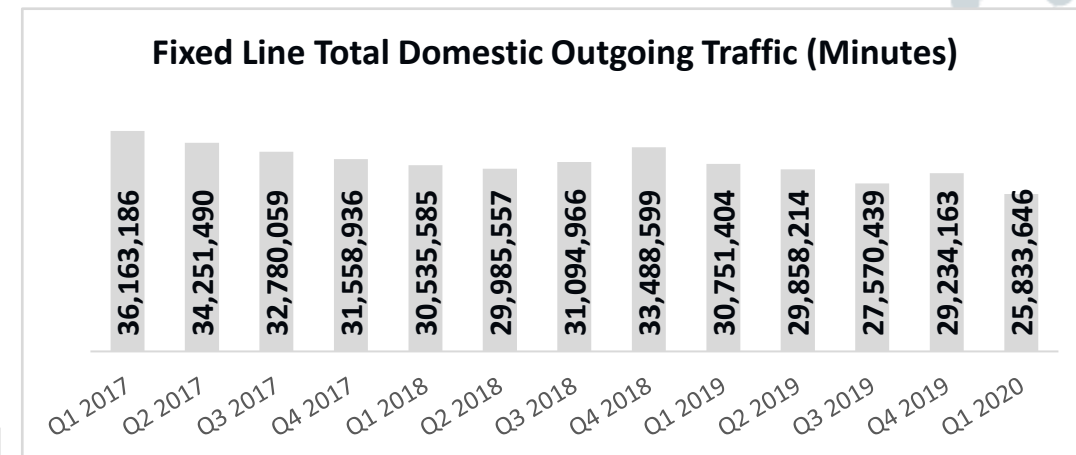
* International Outgoing Minutes originated from ISDN traffic is not included in the chart above

** Revised for 2019 data



Total fixed domestic outgoing traffic in minutes**

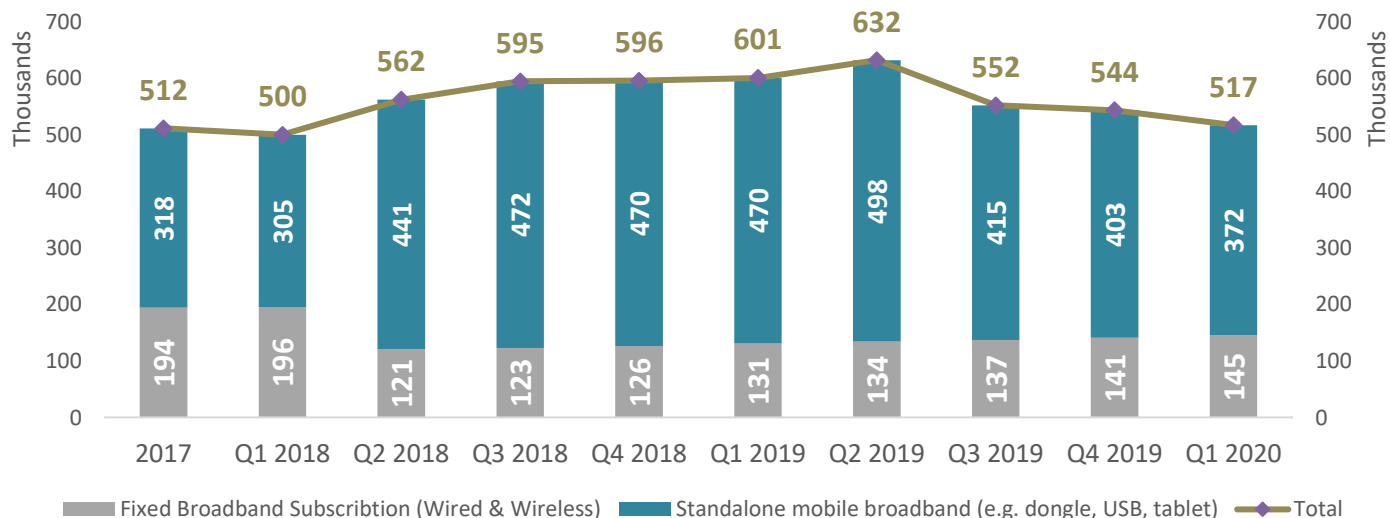
Q1 2019	Q1 2020	
30,751,404	25,833,646	16%



Broadband services: Subscriptions*

- ⊙ Broadband penetration dropped to **142.2%** and between Q1 2019 & Q1 2020 broadband subscription decreased by **7%** for the same period.
- ⊙ Between Q1 2019 & Q1 2020 Fixed wired broadband subscription increased by **14.6%** while fixed wireless decreased by **11%**. The drop in Fixed wireless is mainly due to an operator restating their data and moving subscribers from fixed wireless technology to mobile broadband technology.
- ⊙ Overall, mobile broadband subscription dropped by **8%**. Similarly, standalone broadband subscription also decreased by **21%**.

Broadband services subscriptions from a fixed location
(Dedicated Broadband)

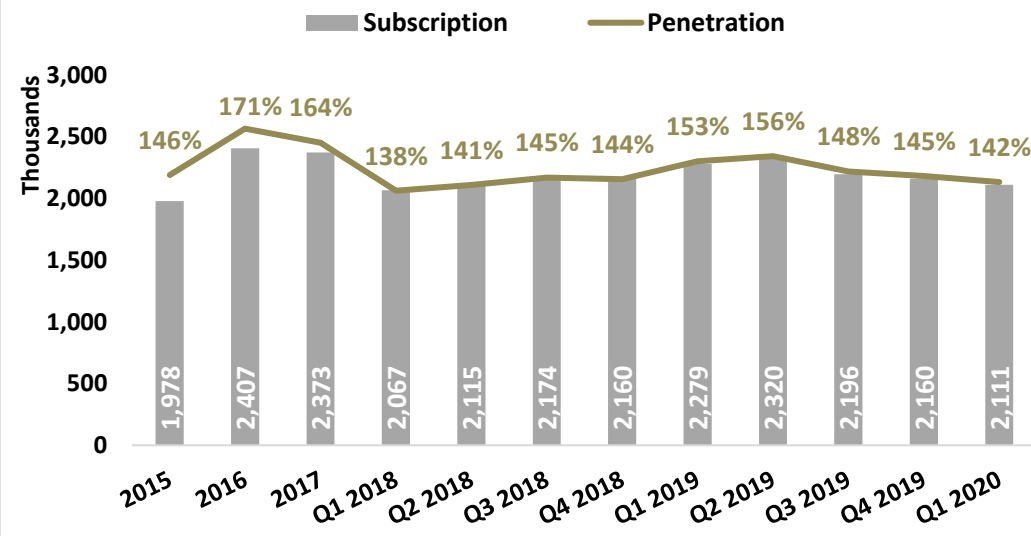


* Standalone numbers have been revised from Q3 2019 as M2M subscribers have been removed from the total number.



No. of broadband subscriptions (End of Q1 2020)*
2,111,372
142% Penetration rate

Broadband Subscriptions and Penetration



Mobile Broadband – Q1 2020

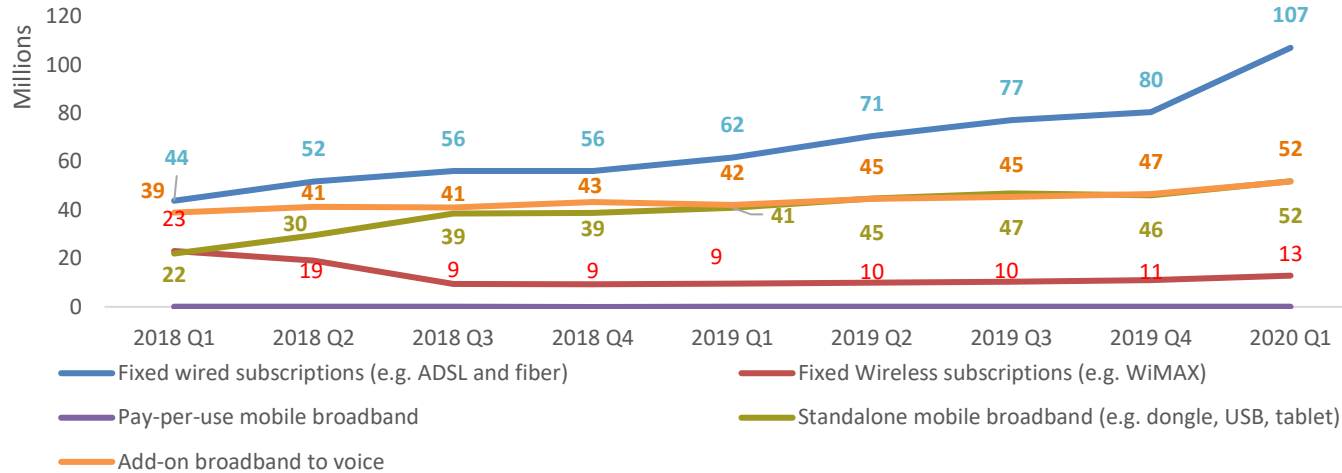


Proportion of broadband subscriptions by access type – Q1 2020

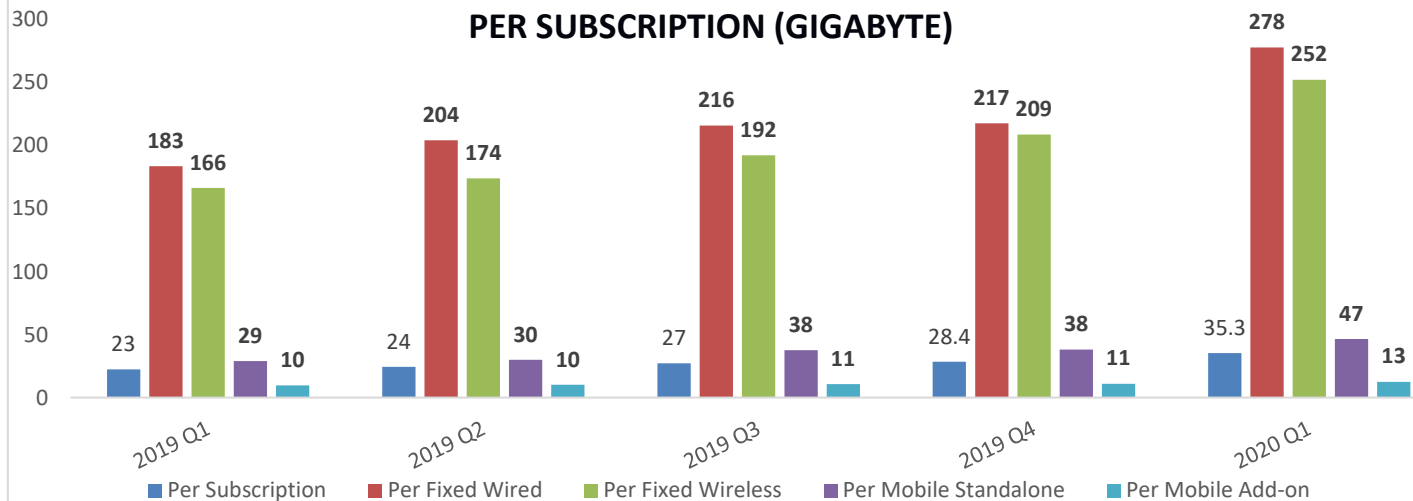


Broadband services: Data Traffic*

TRAFFIC PER TECHNOLOGY



MONTHLY AVERAGE DATA CONSUMPTION PER SUBSCRIPTION (GIGABYTE)



*Fixed wired data traffic was revised from June 2018



Total data traffic in Gigabyte

Q1 2019

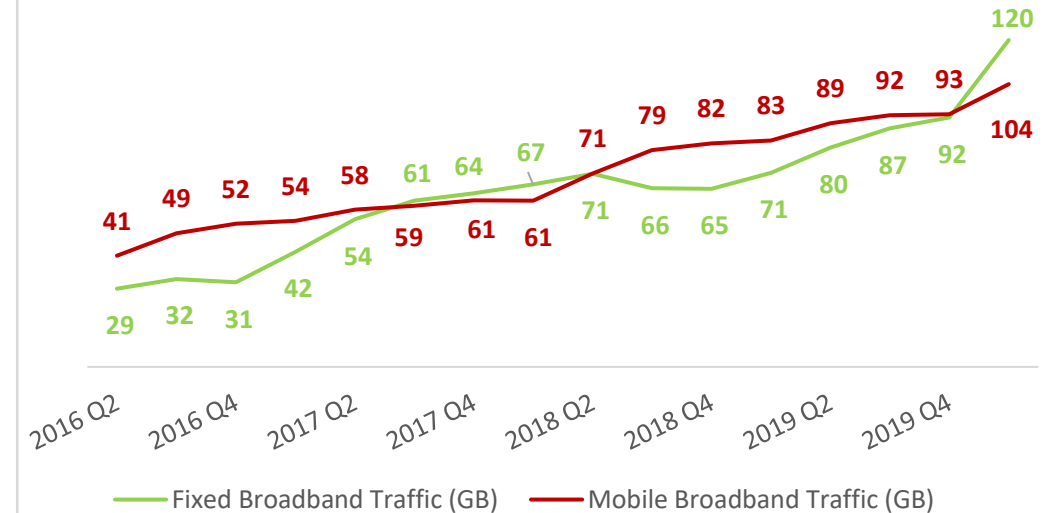
154,211,311

Q1 2020

223,635,808

▲
45%

QUARTERLY DATA CONSUMPTION (PETABYTE)

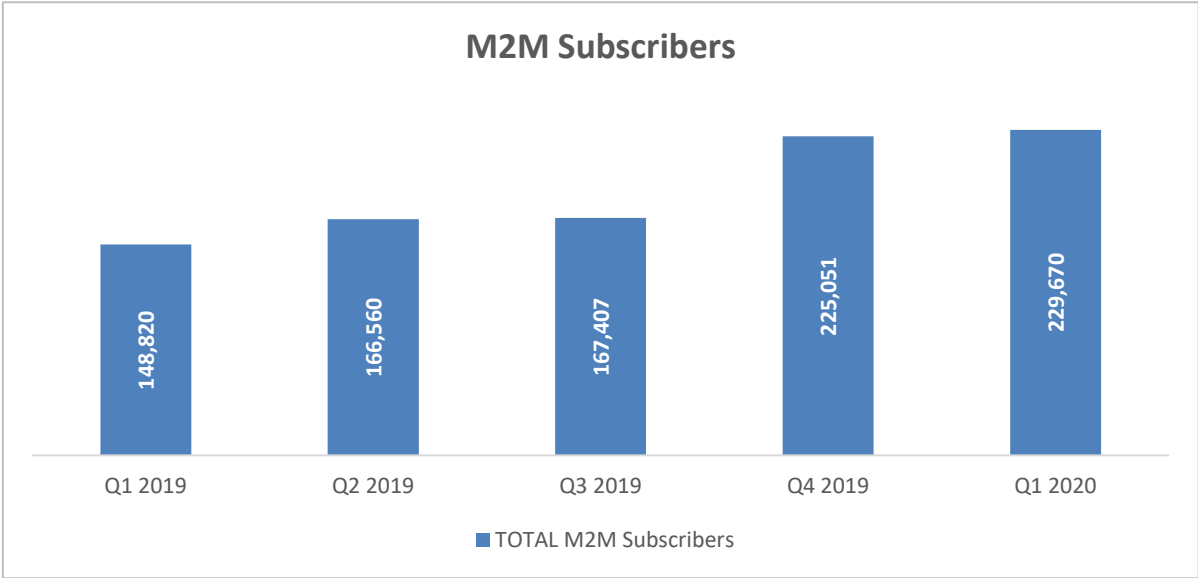


🎯 At the end of Q1 2020, Data consumption stood at **223.6** petabyte, an increase of around **45%** compared to the same period last year.

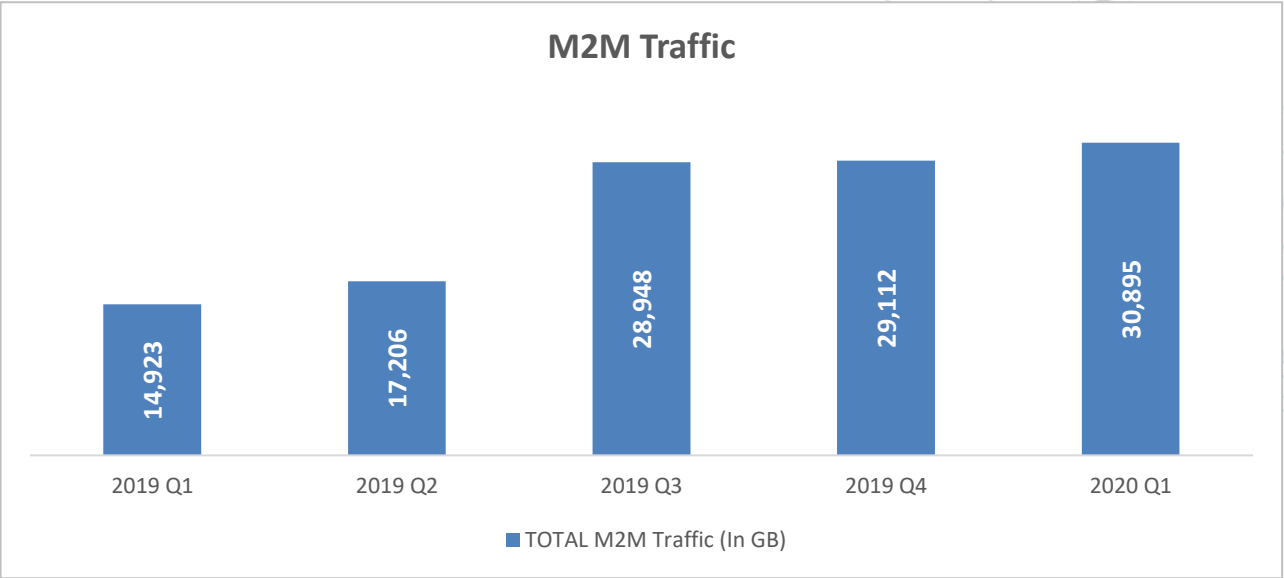
🎯 Fixed Broadband traffic increased by around **68.4%** over the same period last year while mobile data consumption increased by **25%**.

M2M Subscribers & Traffic

M2M Subscribers

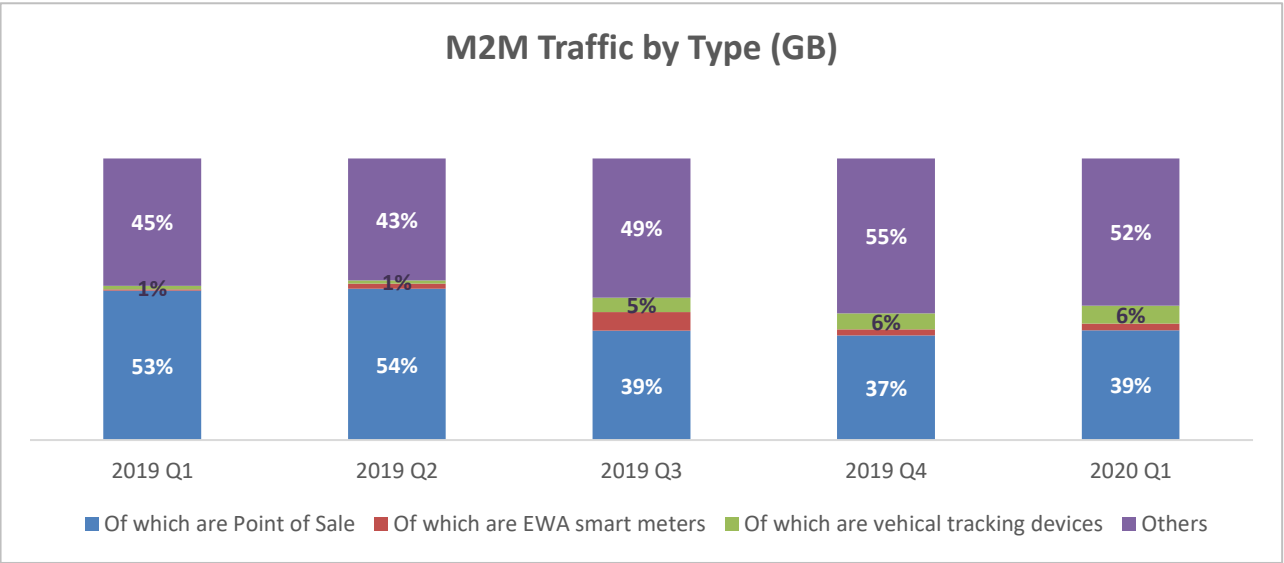


M2M Traffic



- ⦿ M2M subscribers base grow by 54% between Q1 2019 & Q1 2020.
- ⦿ For the same period M2M traffic grow by 107%.
- ⦿ Most of M2M traffic are for Other services, followed by Point of Sale and vehicle tracking

M2M Traffic by Type (GB)



*Fixed wired data traffic was revised from June 2018

Definitions

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

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:

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).

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.

Thank you

