

# Quarterly Market Indicators Report

**Q4 2024**

## Disclaimer



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


## Annex A



20-23

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# Main Telecom Market Indicators (Q4 2023 – Q4 2024)

	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024
 Mobile subscribers	2,415,715	2,490,932	2,538,453	2,516,482	2,563,824
 Mobile penetration	153%	154%	158%	156%	161%
 Mobile prepaid subscriptions	1,561,966	1,559,011	1,598,997	1,567,349	1,596,876
 Mobile postpaid subscriptions	853,748	890,717	905,797	912,991	966,948
 Average outgoing minutes from mobile (Domestic & Inter.)	140	122	121	111	112
 Fixed telephony subscriptions	212,204	210,358	209,822	210,358	210,572
 Fixed telephony penetration (Excluding ISDN)	13.4%	13.3%	13.3%	13.2%	13.2%
 Domestic monthly average minutes per line*	53	50	50	47	47
 International outgoing minutes (Mobile)	185,562,210	173,367,504	171,564,023	164,950,106	144,403,145
 International outgoing minutes (Fixed telephony)	1,427,326	1,329,043	1,292,542	1,206,334	1,131,485
 Mobile broadband subscriptions	2,317,171	2,334,647	2,397,786	2,388,169	2,433,567
 Mobile broadband penetration rate	147%	151%	154%	152.6%	153.2%
 Fiber broadband subscriptions	178,862	179,111	179,690	181,503	181,607
 Fiber broadband penetration per household**	63%	63%	63%	64%	64%
 Total data usage (Petabyte)	474	475	502	508	513
 Average total data usage per month per subscription	63	62	64	65	65

\*An operator restated for the year 2022-2023.

\*\*Fiber Broadband penetration is based on the latest available number of households provided by IGA in 2024.

# Main Telecom Market Indicators for Q4 2024



Mobile subscribers: **2,563,824**  
Penetration: **161%**

Average Int. & Domestic minutes per month per mobile subscription: **112**

Average data usage per mobile broadband subscription\*: **26**

Fixed telephony subscriptions (Excl. ISDN): **210,572**

Penetration: **13.2%**

Fixed Wired Telephony subscriptions **95%**

Fixed Wireless Telephony subscriptions: **5%**

Mobile Broadband subscriptions: **2,605,180**

Mobile Broadband penetration rate: **152.6%**

Fiber Broadband subscriptions: **181,607**

Fiber Broadband penetration rate per household: **64%\*\***



Mobile Prepaid subscriptions: **1,596,876**

Mobile postpaid subscriptions: **966,948**

% of prepaid out of Mobile market subscriptions: **62%**

% of postpaid out of Mobile market subscriptions : **38%**

Domestic monthly average minutes per line: **47**

International Outgoing Minutes (Mobile): **144,403,145**

International Outgoing Minutes (Fixed telephony): **1,131,485**

Total Data Usage: **513 Petabyte**

Fiber Broadband Traffic: **286 Petabyte**

Avg. Traffic per broadband subscription per month: **65 GB**

Avg. Fiber Broadband Traffic per month: **525 GB**

\*Average data usage per mobile broadband subscription excludes Standalone subscribers' traffic.

\*\* Based on latest available number of households provided by IGA.

\*\*\* Includes Broadband added to voice & Standalone mobile broadband.

# Mobile services: Subscriptions\* (1/2)



Number of Mobile subscriptions (End of Q4 2024)

**2,563,824 Subscriptions**

161% Penetration rate

Q4 2023

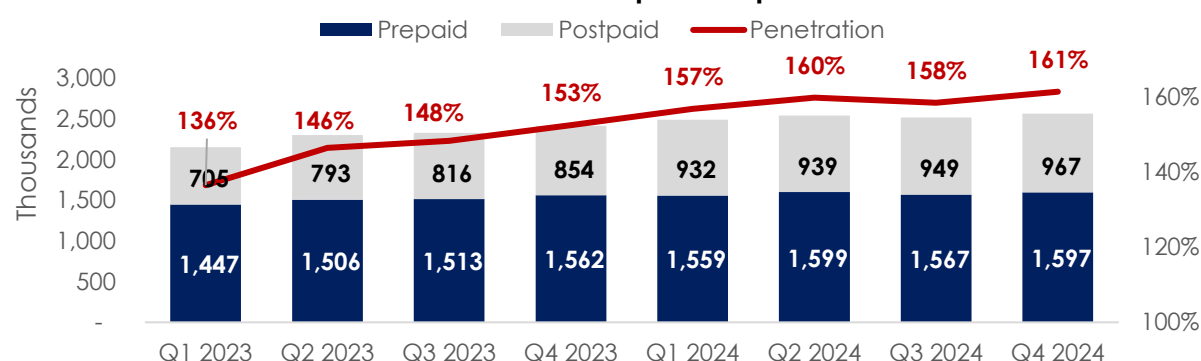
**2,415,715**

Q4 2024

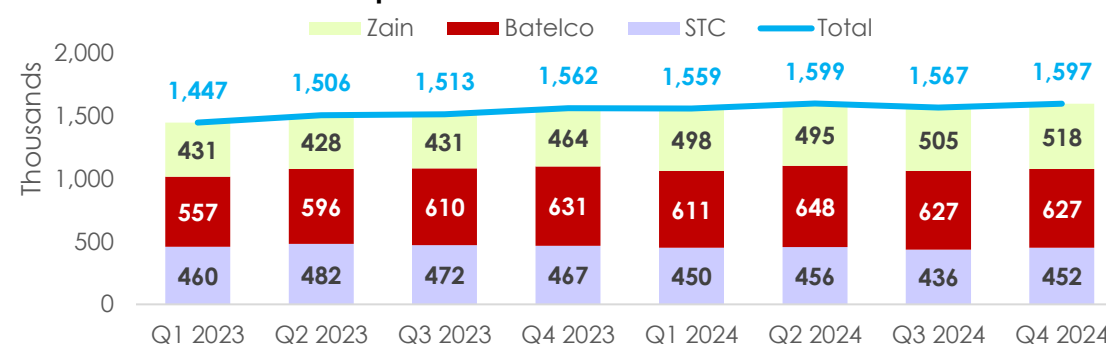
**2,563,824**

**6%**

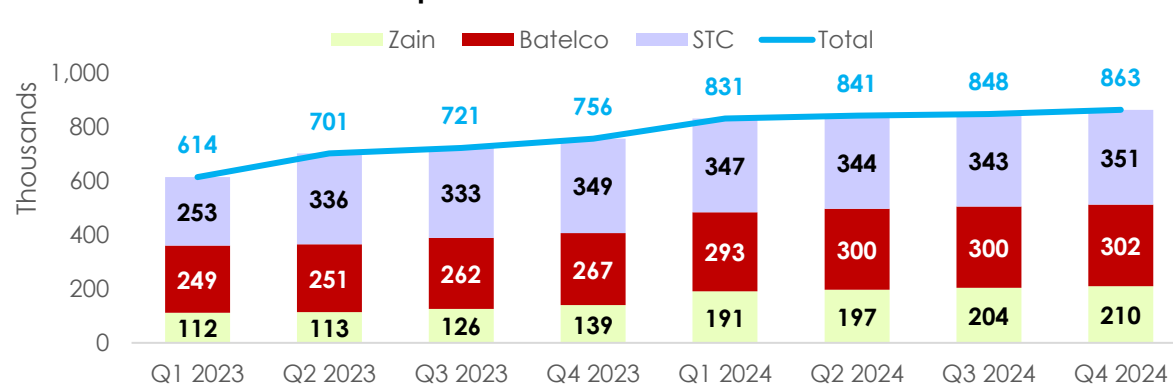
**Number of Mobile Subscriptions & penetration**



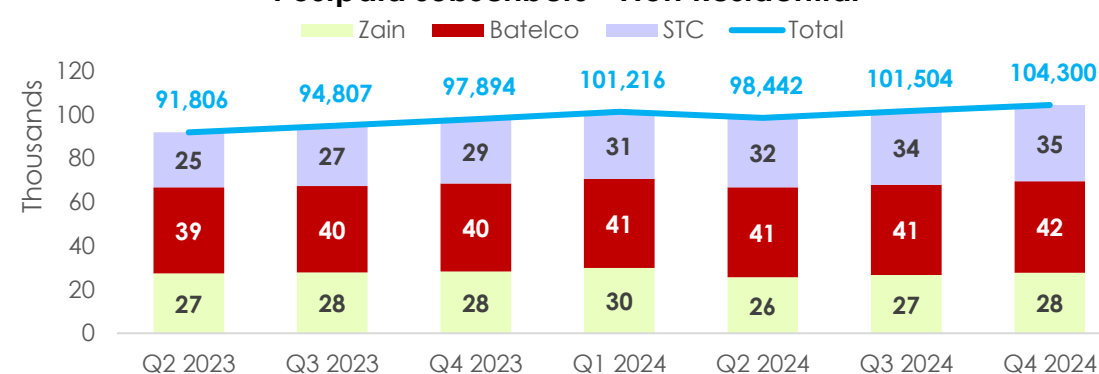
**Prepaid subscribers - Residential\*\***



**Postpaid subscribers - Residential**



**Postpaid subscribers - Non Residential**



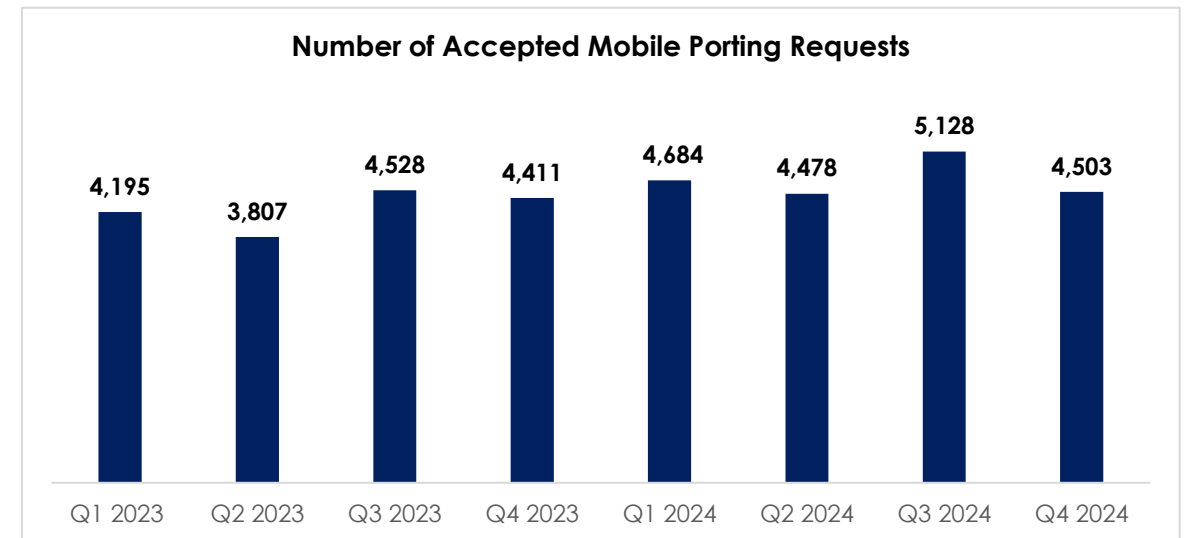
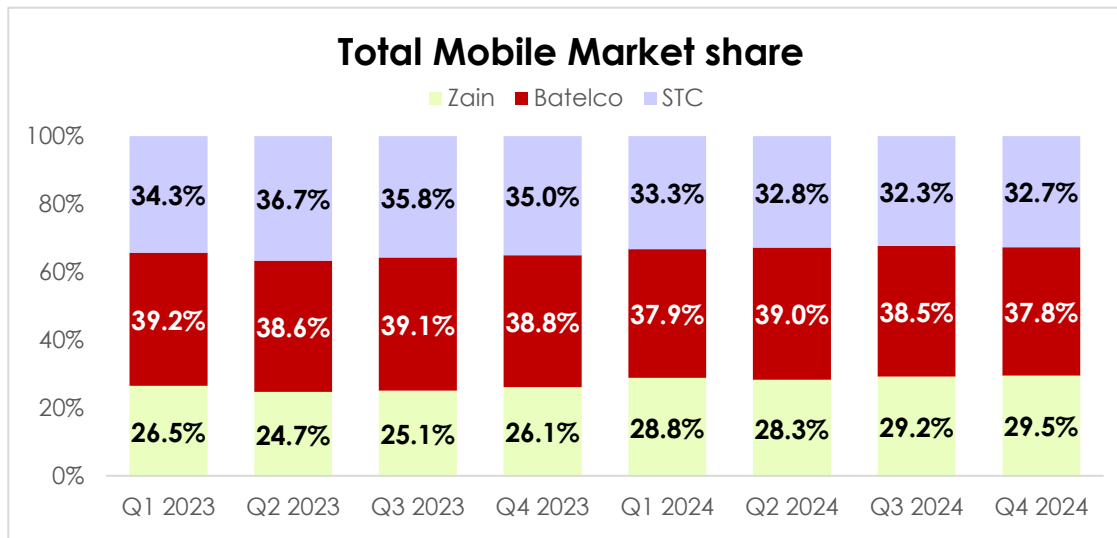
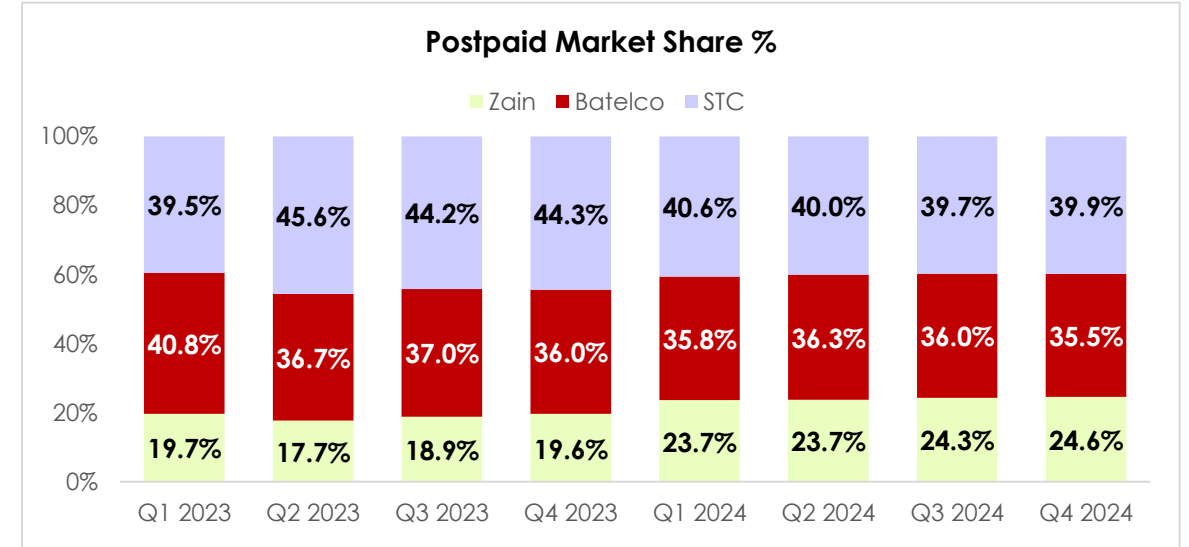
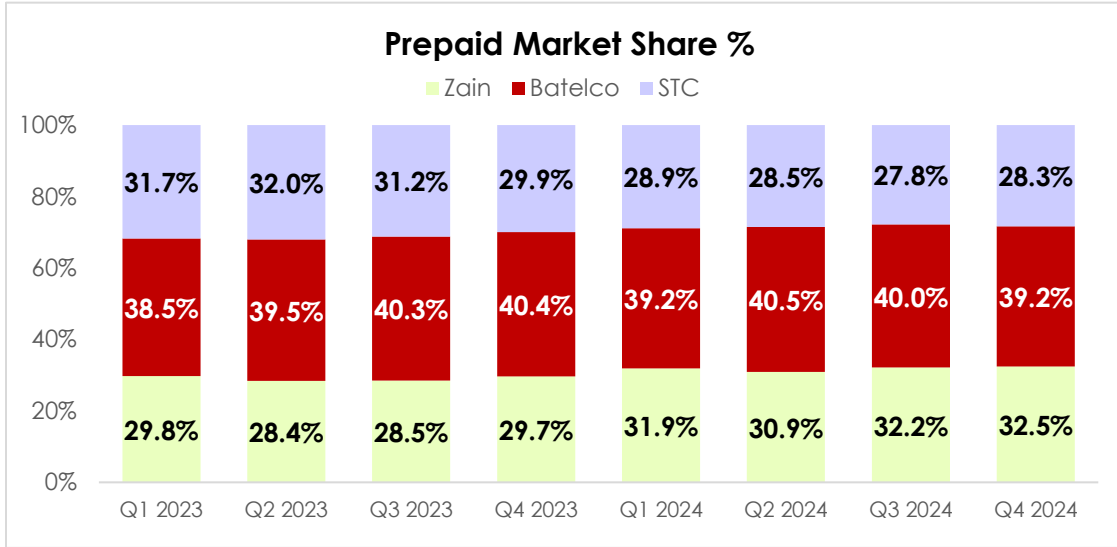
Population***	2021	2022	2023	2024
By IGA	1,504,365	1,565,000	1,577,059	1,588,670

\* Data for Prepaid Non-residential subscribers not yet available for all MNOs.

\*\* Increase in postpaid subscribers is due to operators activating voice on their standalone mobile broadband packages.

\*\*\* Source: IGA

# Mobile services: Subscriptions (2/2)

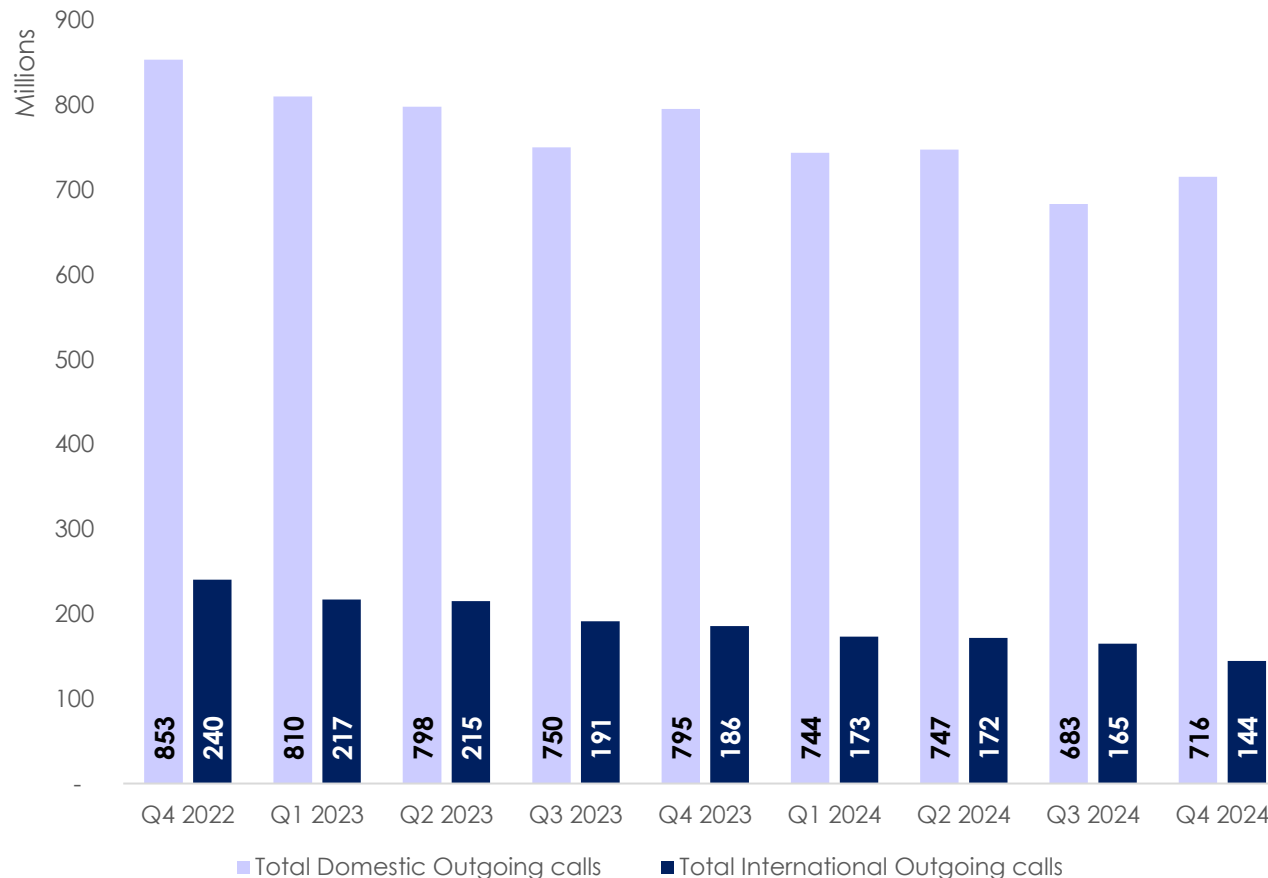


# Mobile services: Traffic\* (Minutes) (1/2)



Total Outgoing Traffic in Minutes  
(Domestic + International)

Total Outgoing Mobile Voice Traffic in Millions of Minutes  
(Domestic-International)



\* Historical data for Non-residential (Domestic & Intl.) Traffic is not unavailable.

Q4 2023

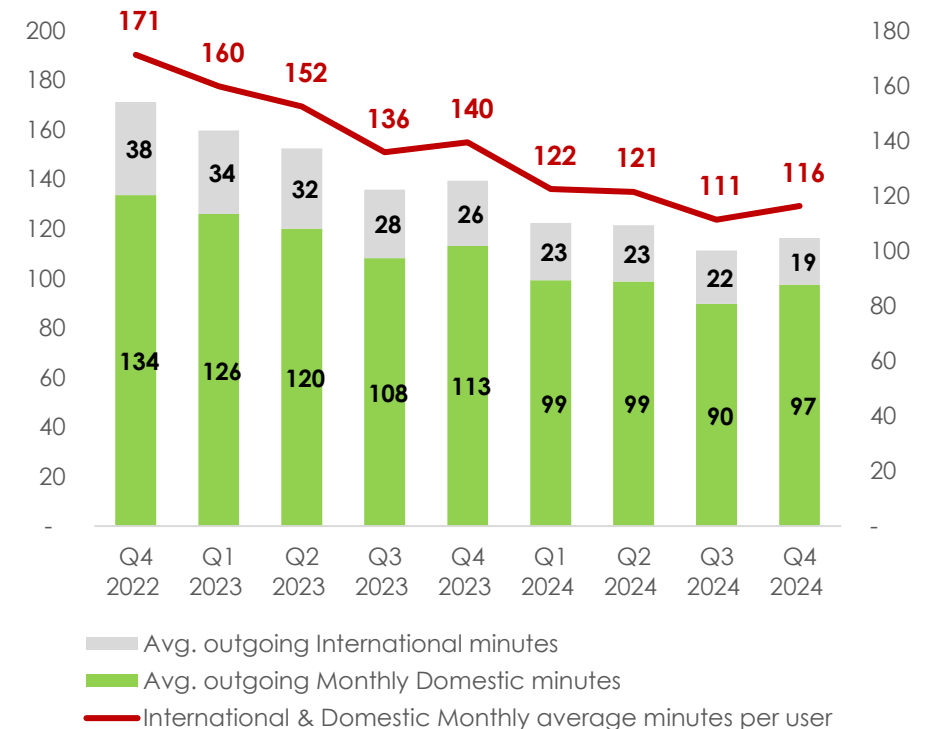
980,901,607

Q4 2024

859,904,486

▼12%

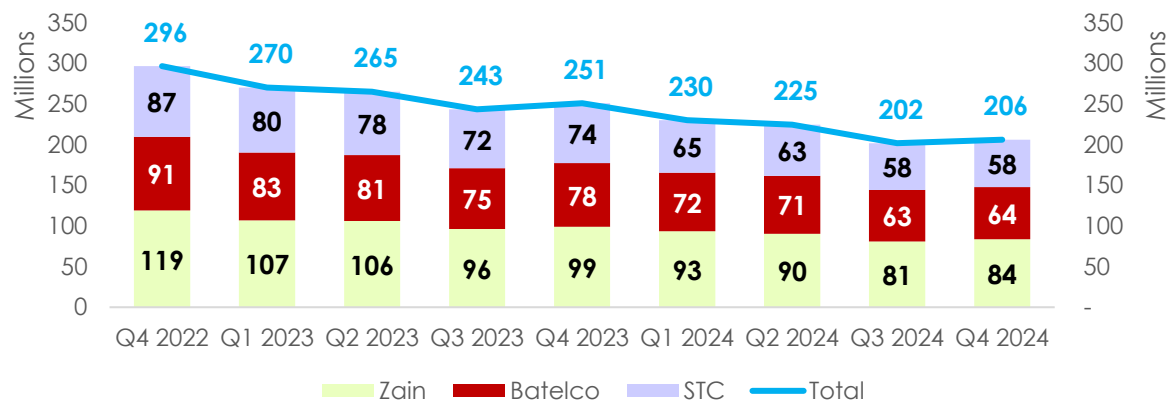
Average Monthly Minutes per User



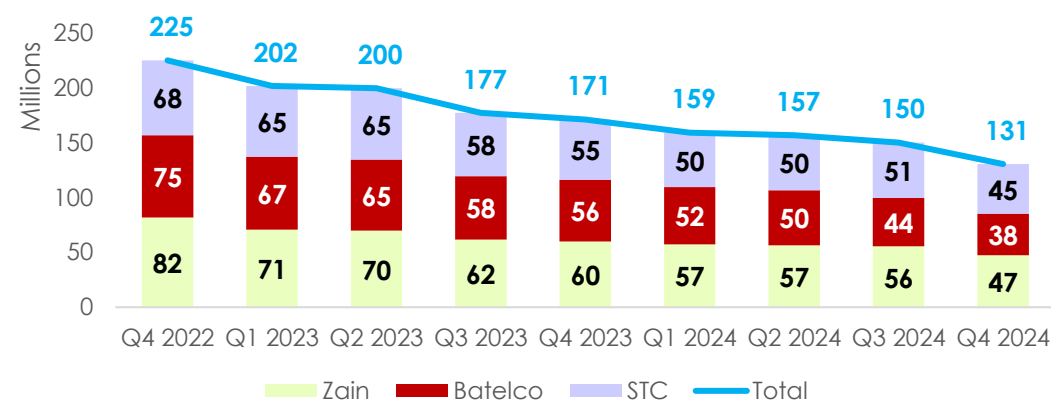


# Mobile services: Traffic\* (Minutes) (2/2)

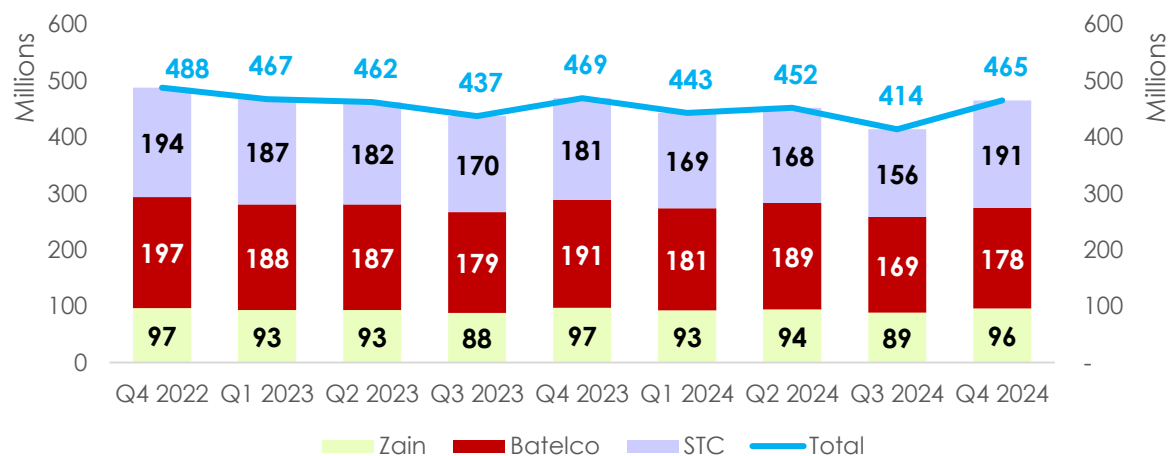
Prepaid Domestic Outgoing traffic (minutes) - residential



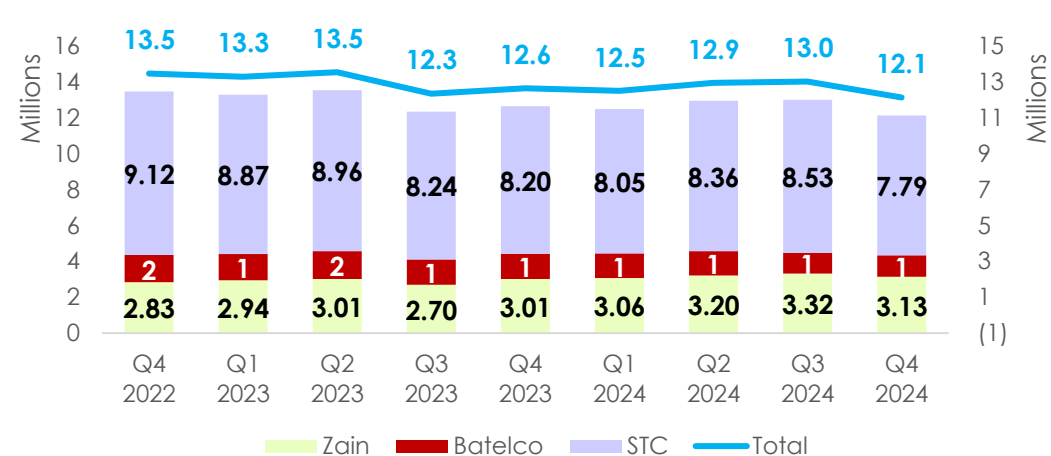
Prepaid International Outgoing traffic (minutes) - residential



Postpaid Domestic Outgoing traffic (minutes) - residential



Postpaid International Outgoing traffic (minutes) - residential

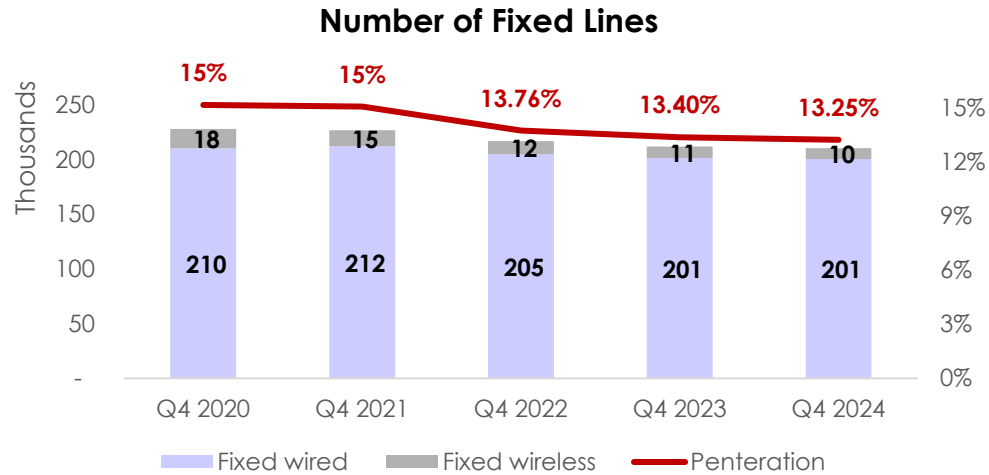


\* Historical data for Non-residential (Domestic & Intl.) Traffic is not available.

# Fixed telephony services: Subscriptions (PSTN & Fixed wireless)\*



No. of fixed telephony subscriptions  
(Excluding ISDN)



End of Q4 2023

**212,204**

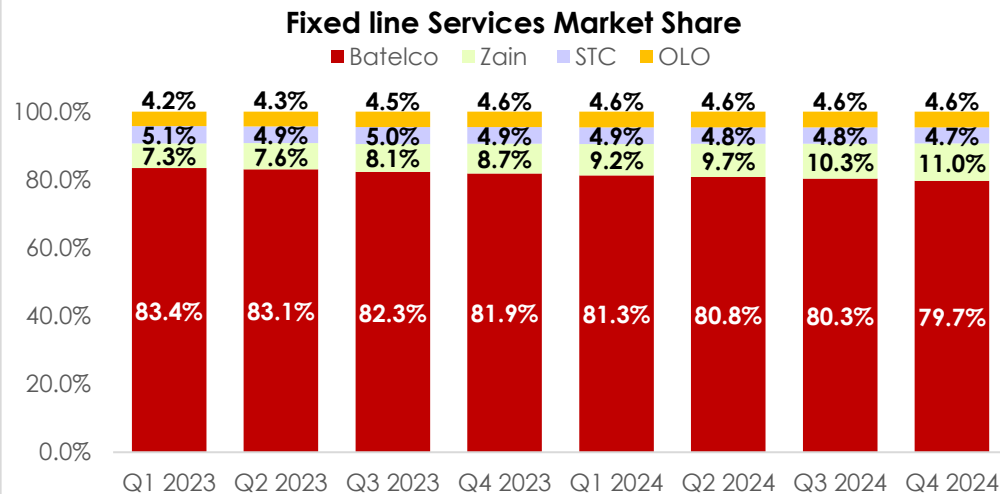
13.4% Penetration rate

End of Q4 2024

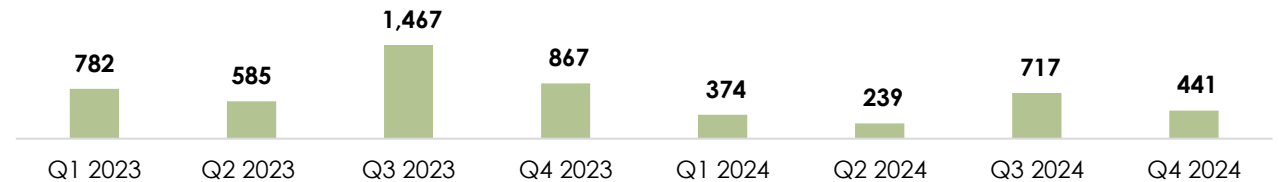
**210,572**

13.2% Penetration rate

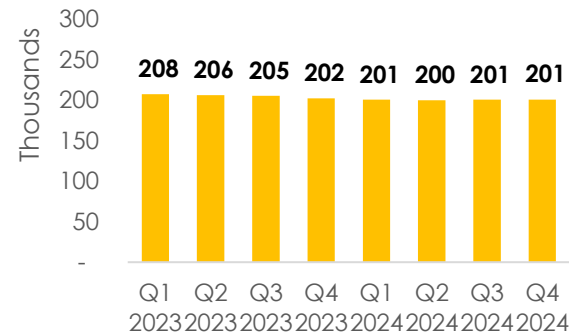
	2022	2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024
	217,077	212,204	210,358	209,822	210,358	210,572
% of Fixed Wired	94%	95%	95%	95%	95%	95%
% of Fixed Wireless	6%	5%	5%	5%	5%	5%



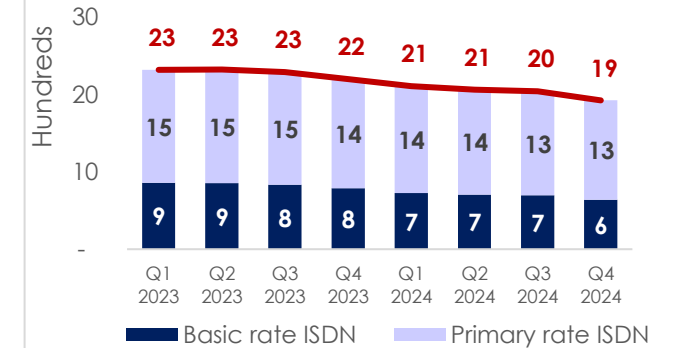
## Number of Accepted Fixed Line Porting Requests



## Total VoIP Subscriptions



## Total ISDN



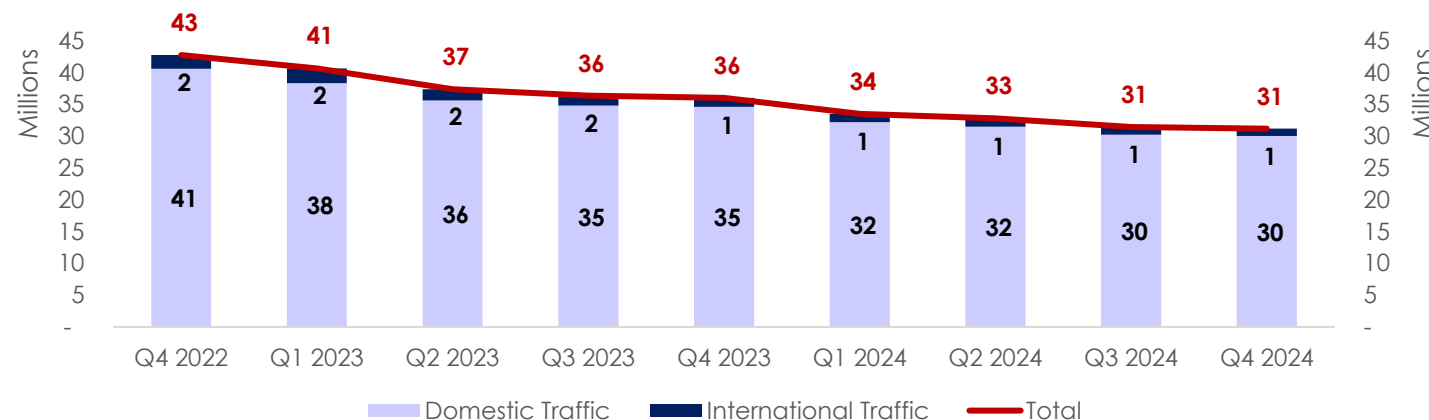
\* Includes VoIP as of 2021 but excludes ISDN.

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



Total fixed domestic outgoing traffic in minutes

Fixed line Domestic & International Outgoing traffic\*\*



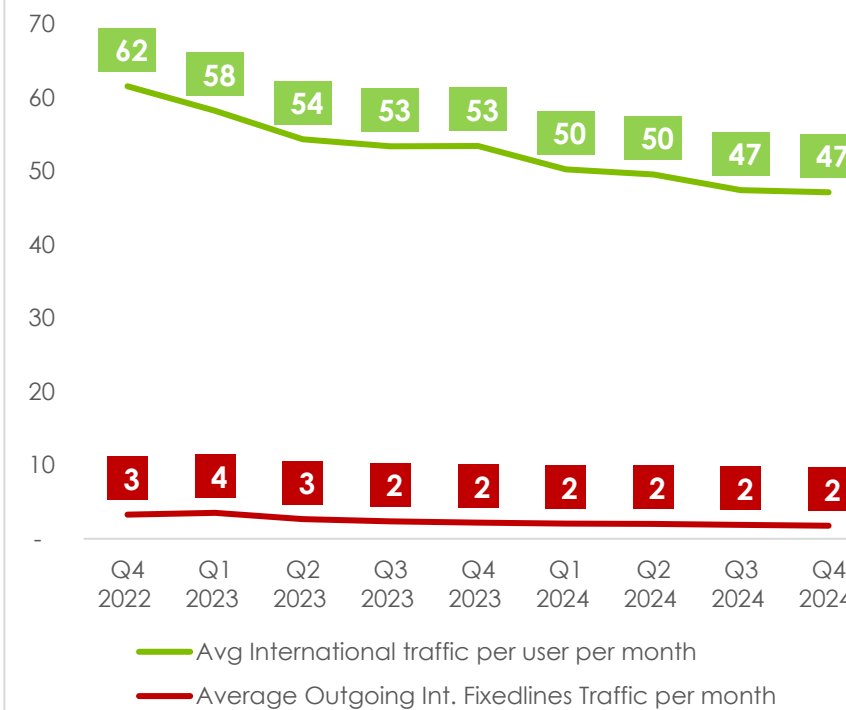
Q4 2023

36,034,438

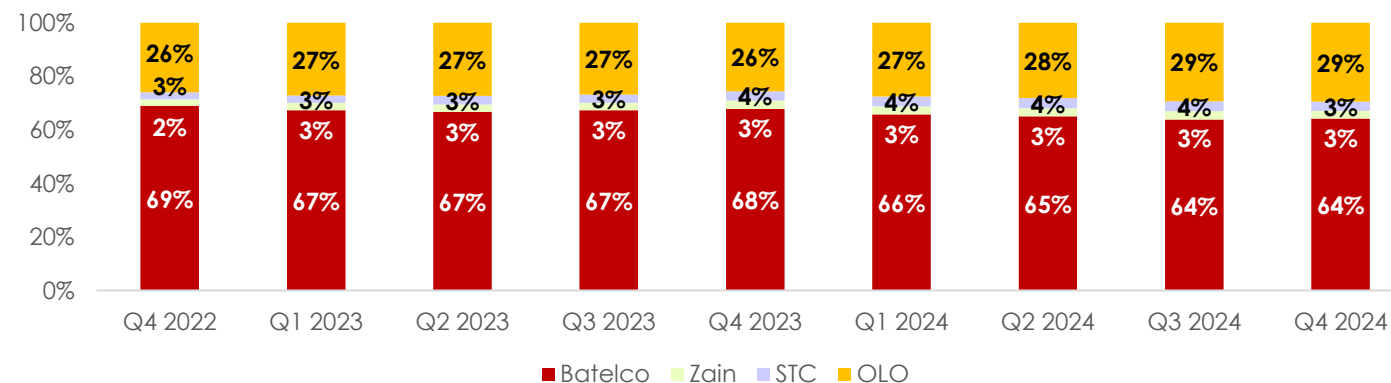
Q4 2024

31,304,236

Monthly Average Outgoing Domestic & International Minutes Per Subscription



Fixed line Domestic traffic market share by operators



\* Includes VoIP and ISDN traffic.

# Broadband services: Subscriptions\* (1/2)



No. of broadband subscriptions (End of Q4 2024)

**2,615,174**

165% Penetration rate

Q4 2023

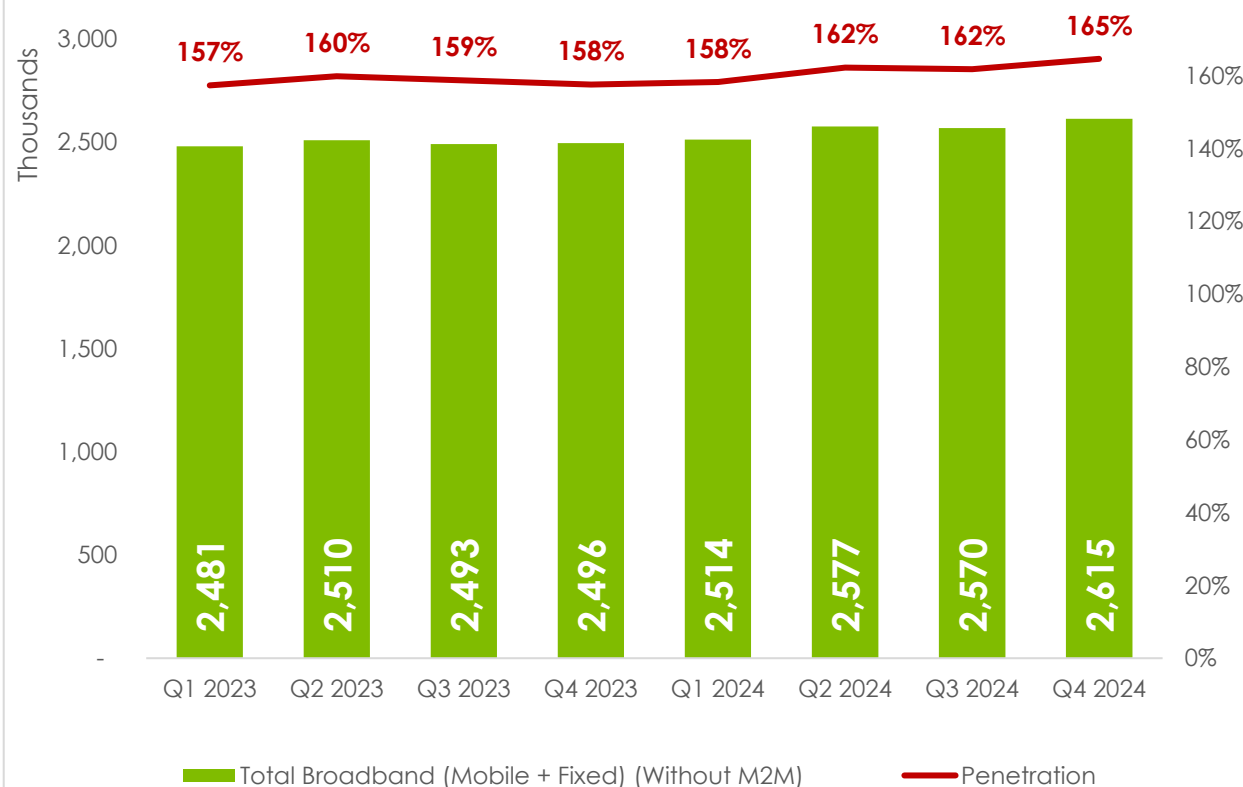
**2,496,033**

Q4 2024

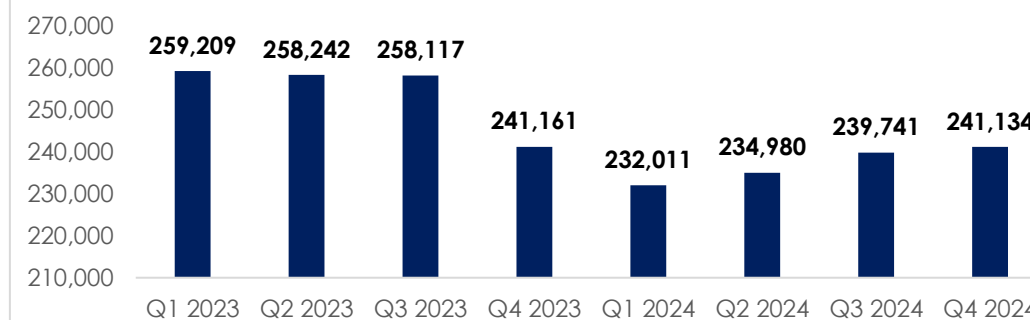
**2,615,174**

▲  
5%

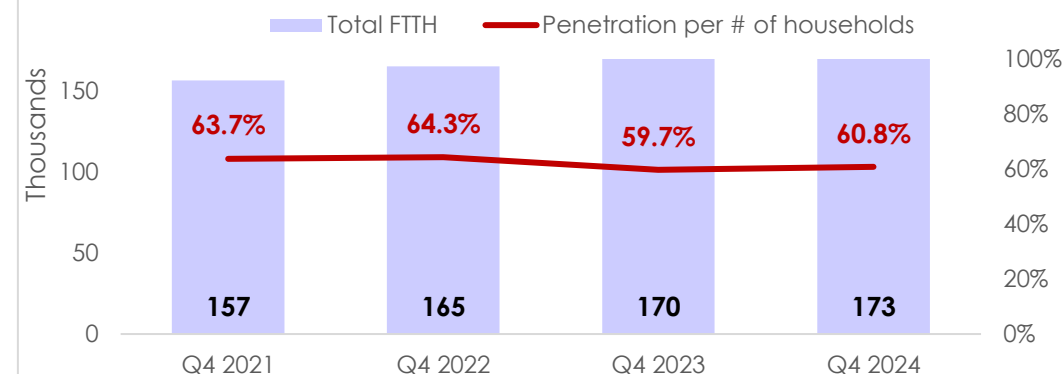
Broadband Subscriptions and Penetration\*\*



Home Broadband Subscriptions (Including Wired & Wireless)\*\*\*



Fiber subscriptions and household penetration\*\*\*



\* Doesn't include M2M.

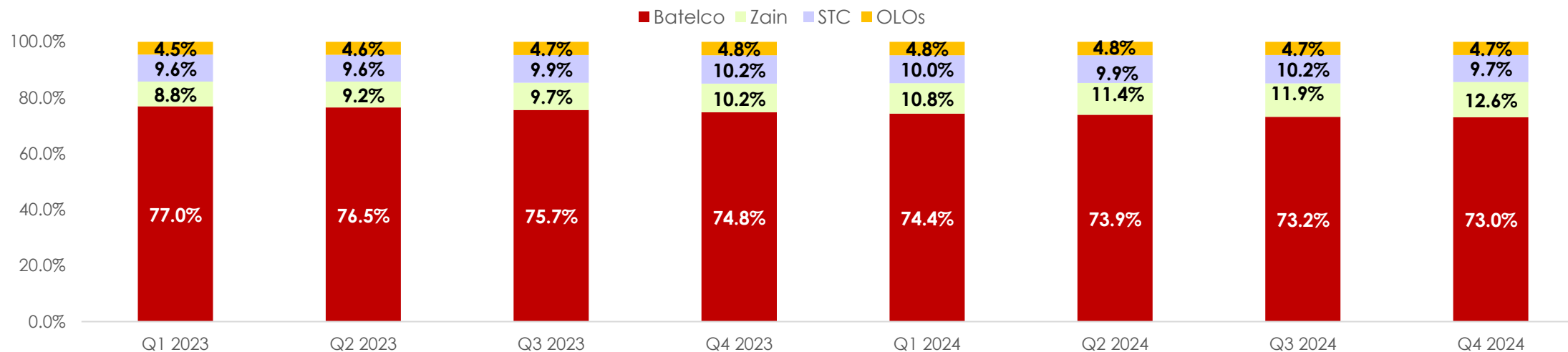
\*\* Mobile broadband data is currently under review.

\*\*\* Includes residential Fiber, Fixed Terrestrial and Mobile Home BB. Drop in Home Broadband subscriptions is due to activation of voice service.

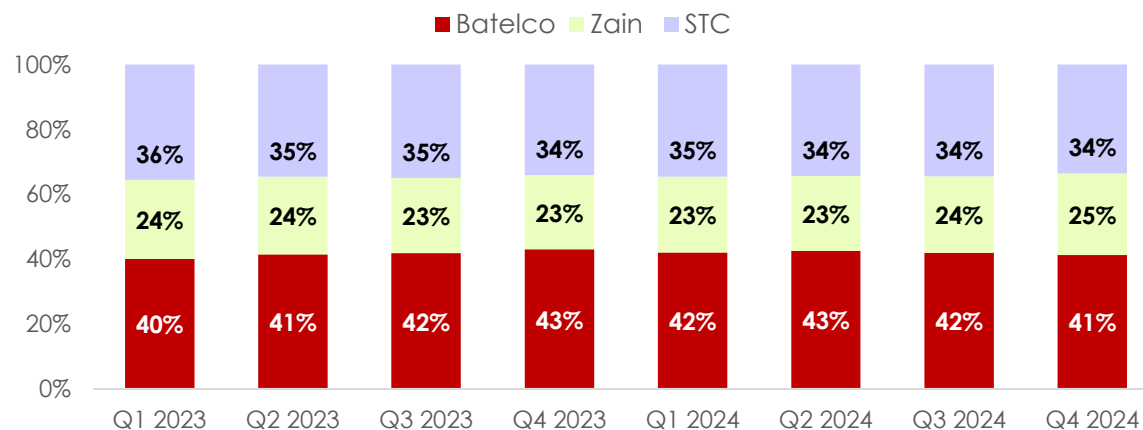
\*\*\*\* Number of households is based on the latest IGA data in 2024.

# Broadband services: Subscriptions (2/2)

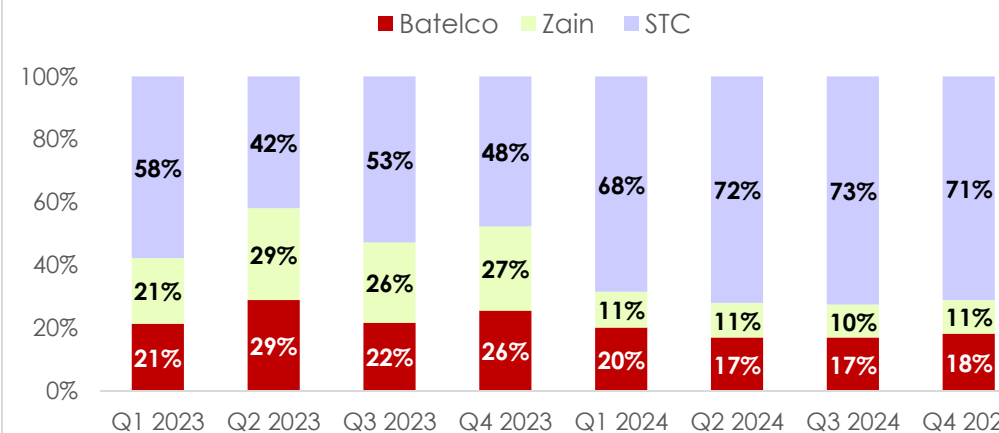
## Fibre Broadband Subscriptions Market Share



## Mobile Broadband Subscriptions Market Shares (Including Add-on, Pay-Per-Use & Standalone)



## Mobile Standalone Broadband Market Share



# Broadband services: Data Traffic 1 of 2



Total data traffic in Gigabyte

Q4 2023

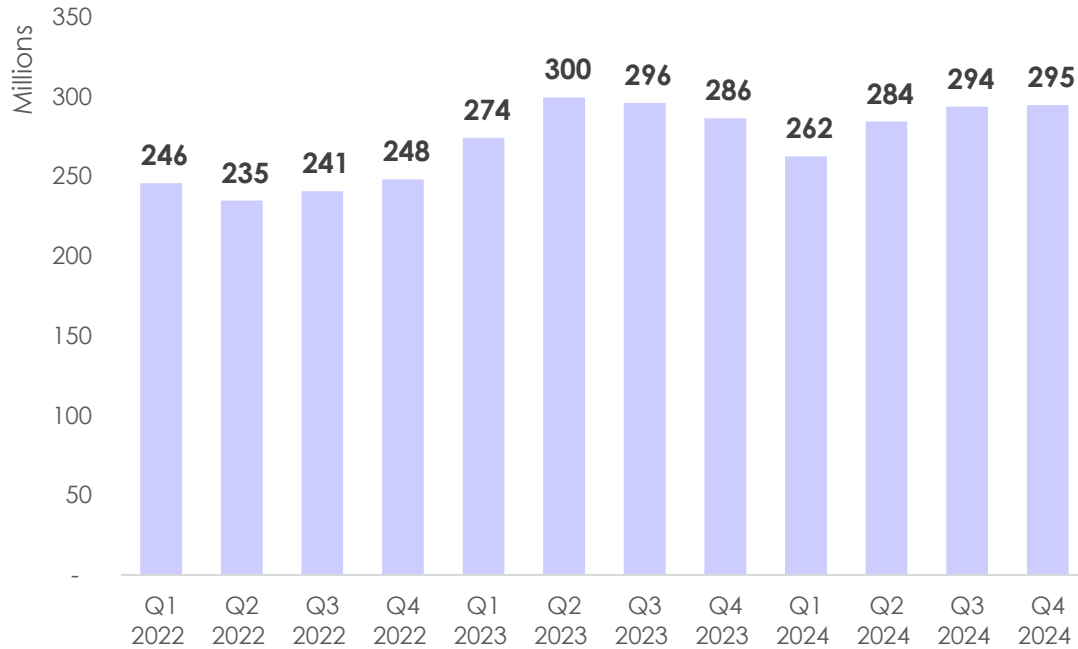
486,259,226

Q4 2024

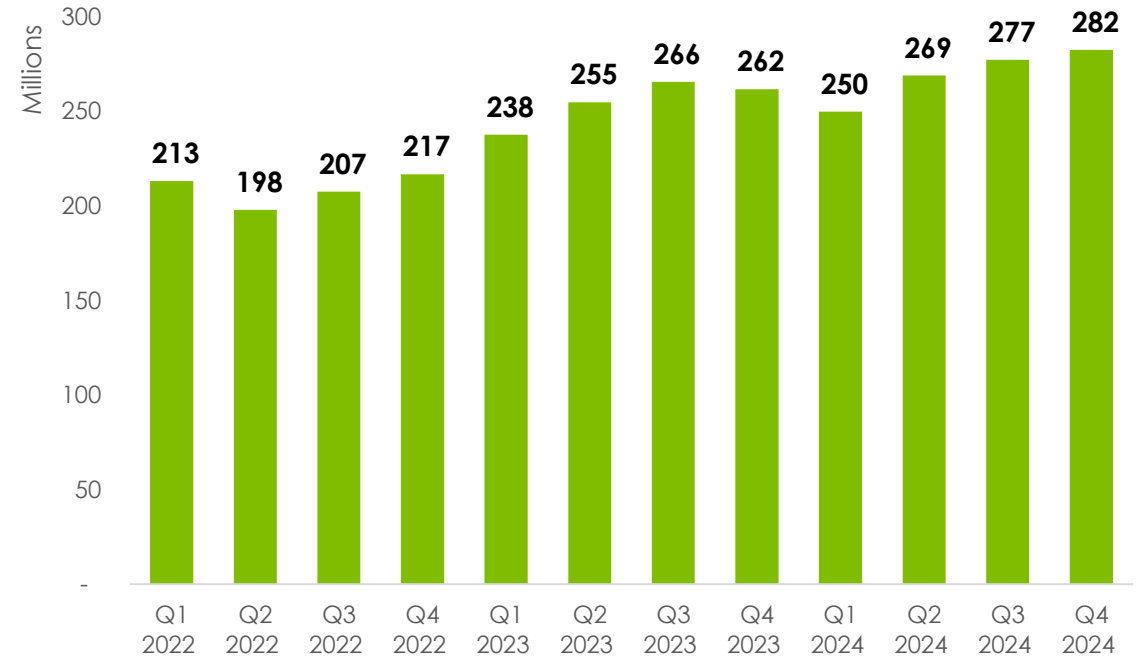
513,054,322

▲ 6%

Home Broadband Traffic\* (Including Wired & Wireless)



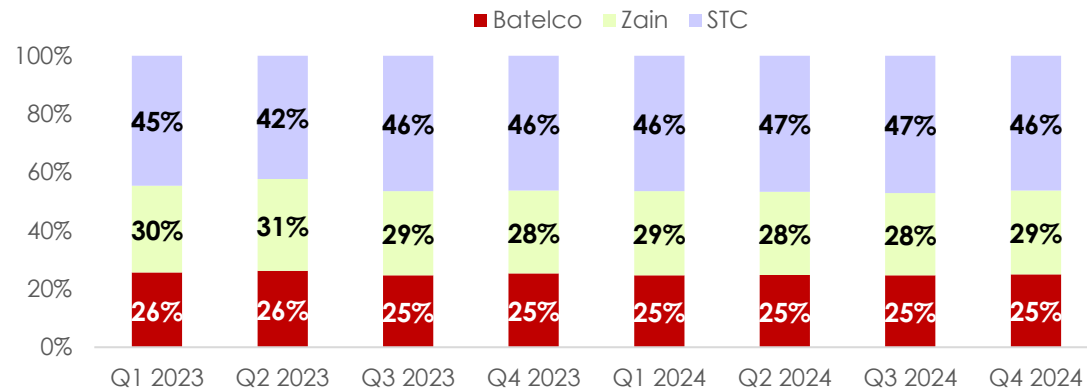
Fibre Broadband Traffic



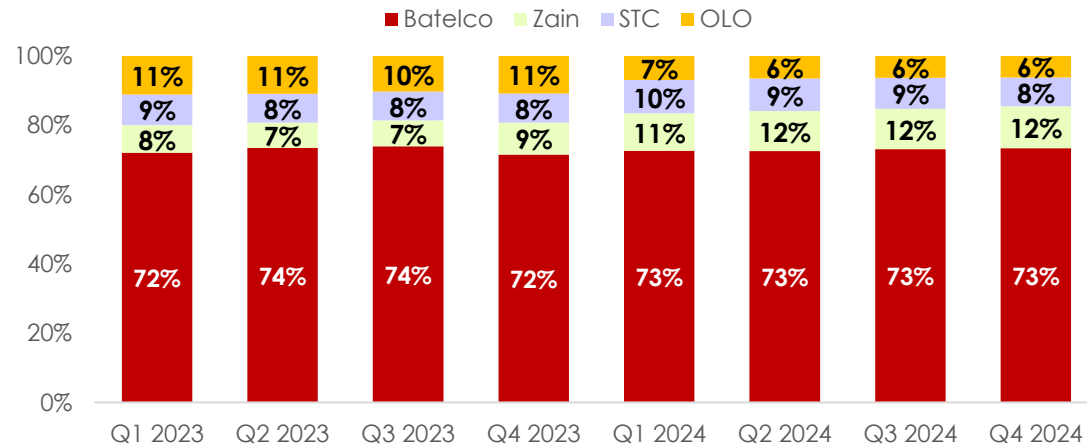
\* Includes residential Fiber, Fixed Terrestrial and Mobile Home BB.

# Broadband services: Data Traffic 2 of 2

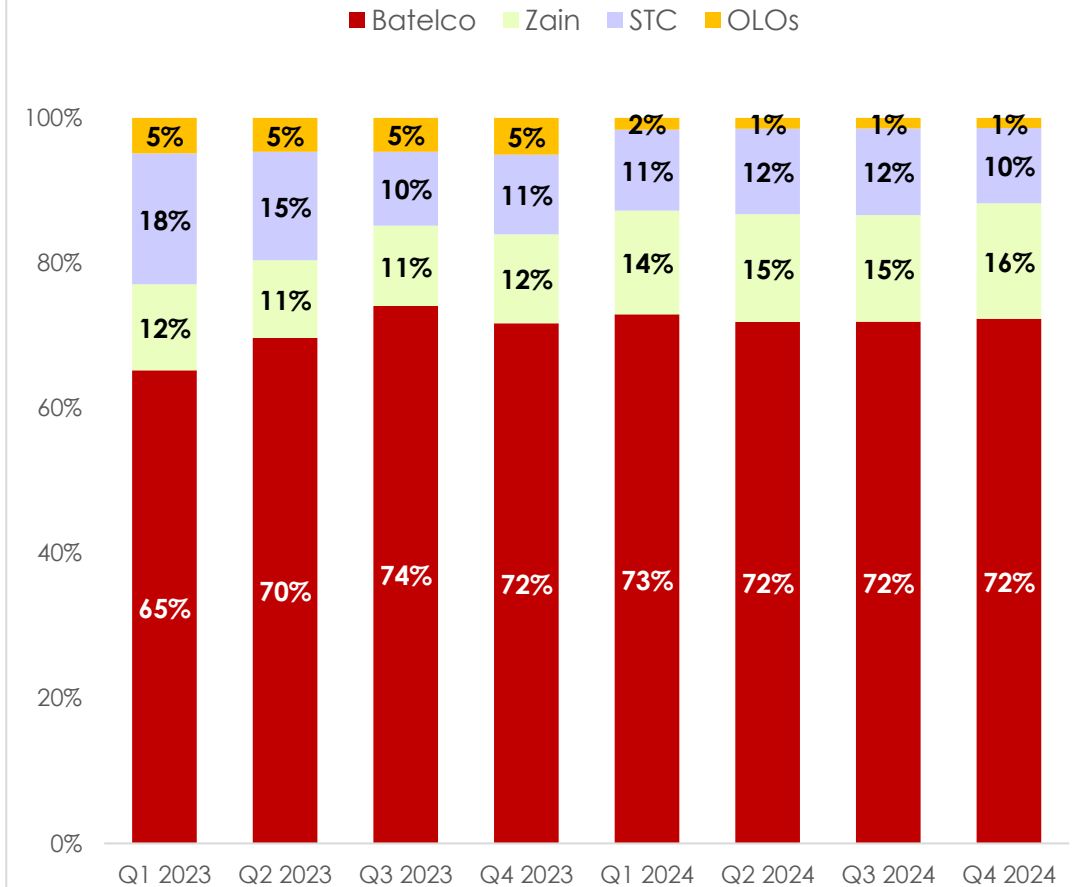
Mobile Broadband Traffic Market Share (Pay-per-use, Standalone & Add-on)



Fixed Broadband Traffic Market Share

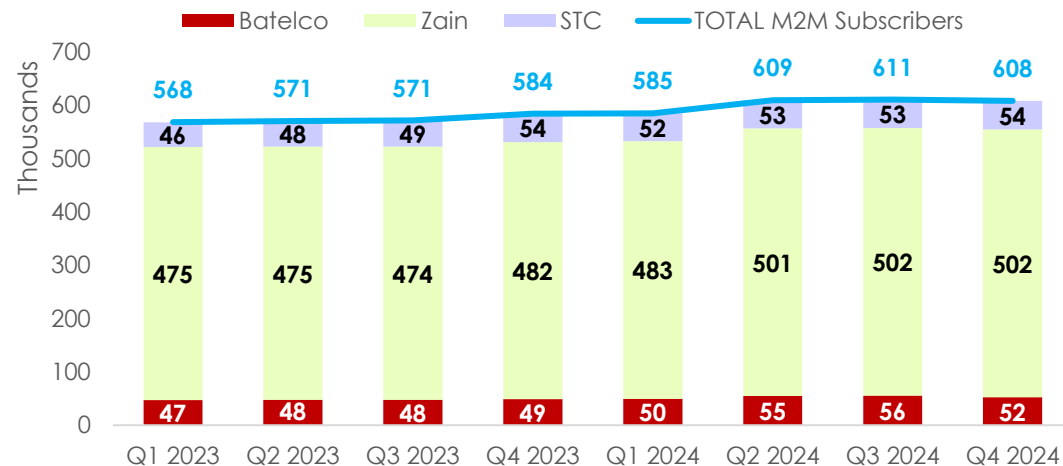


Home Broadband Market Share (including Fixed wired, Fixed Wireless, Mobile Home BB)

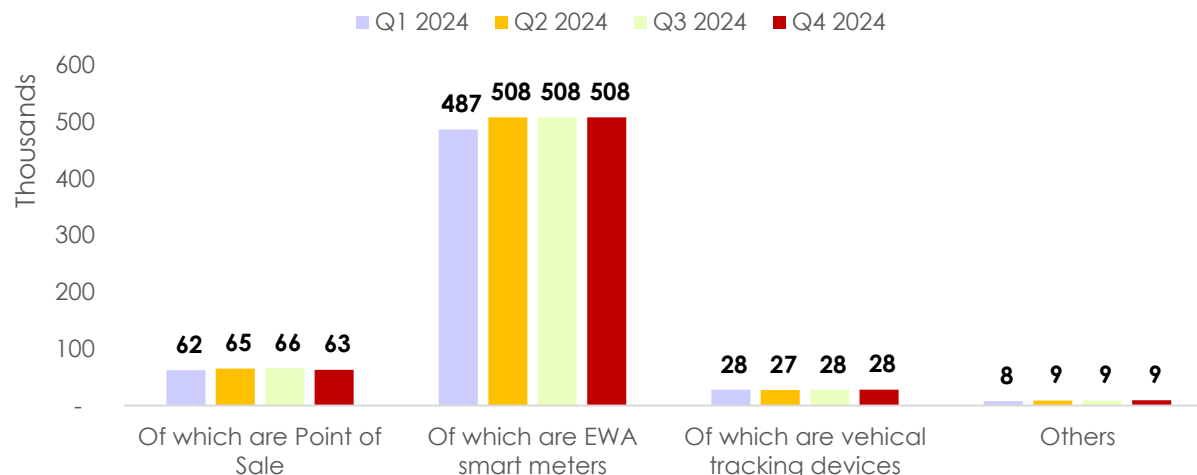


# M2M Subscribers & Traffic

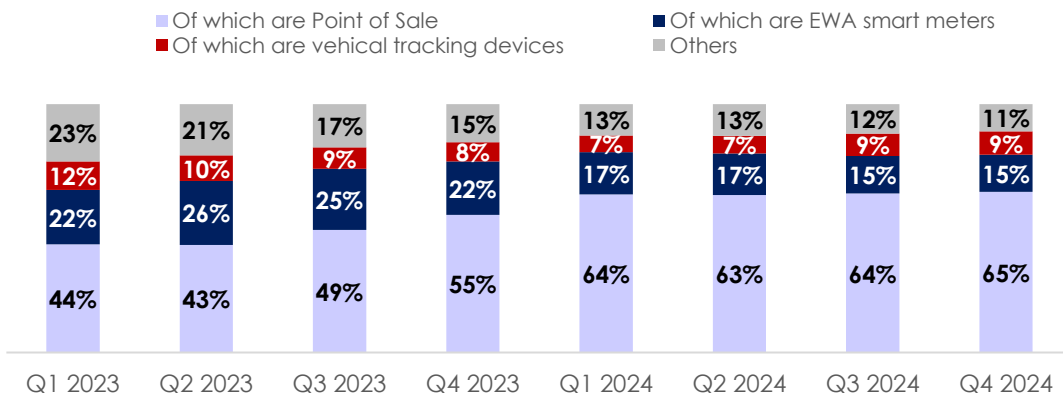
## M2M Subscribers (Thousands)



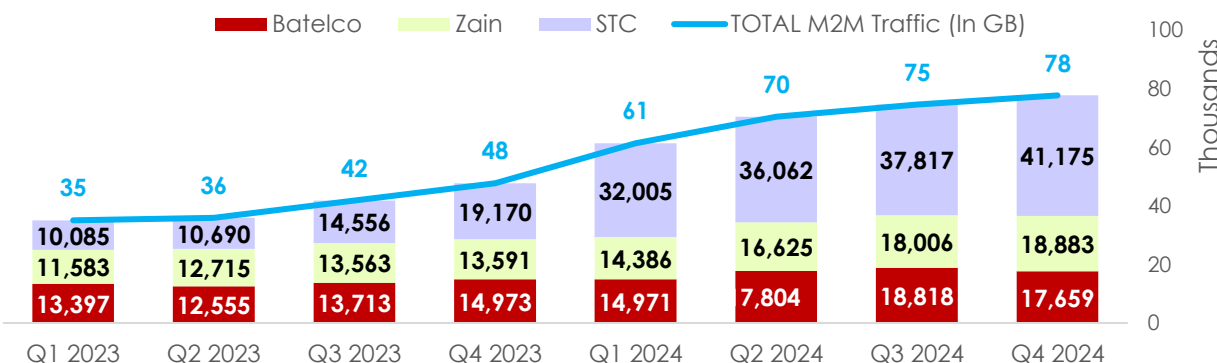
## M2M Subscribers by type



## M2M Traffic by Type (GB)



## M2M Traffic (in GB)





# Definitions

## Fixed-telephone subscriptions

Fixed-telephone subscriptions refers to the sum of all active

- i) analogue fixed-telephone lines,
- ii) voice-over-IP (VoIP) subscriptions,
- iii) fixed wireless local loop (WLL) subscriptions,
- iv) ISDN voice-channel equivalents,
- v) fixed public payphones and vi) satellite-based subscriptions

provided to fixed locations that allow for a voice communication. This indicator was previously called Main telephone lines in operation.

\*Active lines are those that have registered an activity in the past three months.

## Prepaid mobile-cellular telephone subscriptions

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-cellular telephone subscriptions

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 active handset-based and computer-based (USB/dongles) mobile-broadband subscriptions that allow access to the Internet. It covers actual subscribers, not potential subscribers, even though the latter may have broadband-enabled handsets. Subscriptions must include a recurring subscription fee or if in the prepayment modality, pass a usage requirement – users must have accessed the Internet in the last three months.

Clarification: For mobile data subscription to be considered broadband, the operator must advertise a connection that will be capable of using at least a 3G/UMTS network, so that a nominal downloading speed of 256 kbit/s is at a minimum expected. Hence, subscriptions that are only to use GPRS and EDGE technologies are to be excluded. A contract (post pay) subscription pays a recurrent bill with a predetermined frequency. It should be counted as an active mobile broadband subscription no matter the effective data consumption realized by the user. A prepayment or a pay-as-you-go subscription needs to pass the activity criterion to be considered as 'active': a billable Internet connection must have occurred in the last three months. Note that for a mobile subscription to be considered broadband it must allow access to the public open Internet, hence, any subscription that limits access only to walled garden or services provided in exclusivity by the mobile operator, are not counted as access to the open Internet, and hence, are not 'broadband'. Several cases are defined below. (See Table 4 in ITU document)

# Thank You

# Annex A

# Mobile subscriptions – raw data

Prepaid <u>residential</u> subscribers						Prepaid non- <u>residential</u> subscribers*				
	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024
Batelco	630,755	610,892	648,126	627,135	626,584	N/A	N/A	N/A	N/A	N/A
Zain	463,812	497,767	494,880	504,525	518,412	N/A	N/A	N/A	N/A	N/A
STC	467,399	450,349	455,991	435,685	451,880	N/A	N/A	N/A	N/A	N/A
<b>Total</b>	<b>1,561,966</b>	<b>1,559,008</b>	<b>1,598,997</b>	<b>1,567,345</b>	<b>1,596,876</b>	N/A	N/A	N/A	N/A	N/A
Postpaid <u>residential</u> subscribers						Postpaid non- <u>residential</u> subscribers				
	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024
Batelco	267,218	292,698	299,533	300,463	301,861	40,252	40,597	41,146	41,264	41,771
Zain	139,471	190,800	197,028	203,921	210,094	28,240	29,900	25,573	26,615	27,720
STC	349,165	347,210	344,453	343,249	350,693	29,402	30,719	31,723	33,625	34,809
<b>Total</b>	<b>755,854</b>	<b>830,708</b>	<b>841,014</b>	<b>847,633</b>	<b>862,648</b>	<b>97,894</b>	<b>101,216</b>	<b>98,442</b>	<b>101,504</b>	<b>104,300</b>

\*An operator amended their reporting of prepaid non-residential subscribers starting Q3 2023.

# Fixed line subscriptions – raw data

## Fixed line subscriptions – PSTN & VoIP (residential)

	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024
Batelco	122,374	121,662	120,859	120,228	119,271
Zain	16,467	17,235	18,072	18,930	20,010
STC	7,298	7,105	7,000	6,951	6,824

## Fixed line subscriptions – PSTN & VoIP (non-residential)

Batelco	51,369	49,347	48,695	48,767	48,541
Zain	1,944	2,177	2,359	2,648	3,095
STC	3,036	3,116	3,121	3,118	3,115
OLOs*	9,716	9,716	9,716	9,716	9,716
<b>Total**</b>	<b>212,204</b>	<b>210,358</b>	<b>209,822</b>	<b>210,358</b>	<b>210,572</b>

\* Includes residential & non-residential

\*\* Excluding ISDN.

	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024
Basic-rate ISDN	788	726	707	696	641
Primary-rate ISDN	1,408	1,382	1,356	1,344	1,282
<b>Total</b>	<b>2,196</b>	<b>2,108</b>	<b>2,063</b>	<b>2,040</b>	<b>1,923</b>

# Fiber Broadband subscriptions – raw data

## Fiber Broadband subscriptions – (residential)

	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024
Batelco	126,394	125,958	125,740	125,853	125,681
Zain	15,711	16,502	17,362	18,243	19,345
STC	14,466*	13,976	13,649	13,237	12,886
OLOs	5,855	5,855	5,855	5,855	5,855
<b>Total</b>	<b>162,426</b>	<b>162,291</b>	<b>162,606</b>	<b>163,188</b>	<b>163,767</b>

## Fiber Broadband subscriptions – (non-residential)

	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024
Batelco	1,214	1,165	1,085	1,045	986
Zain	1,723	1,963	2,148	2,437	2,540
STC	2,487	2,790	3,007	4,052	3,550
OLOs	2,326	2,326	2,326	2,326	2,326
<b>Total</b>	<b>7,750</b>	<b>8,224</b>	<b>8,566</b>	<b>9,860</b>	<b>9,402</b>
<b>GRAND TOTAL</b>	<b>170,176</b>	<b>170,515</b>	<b>171,172</b>	<b>173,048</b>	<b>173,169</b>

\*STC figures amended for Q3-Q4 2023.

# Total Mobile Broadband subscriptions\* – raw data

## Mobile Broadband subscriptions – (Prepaid)

	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024
Batelco	630,755	610,892	648,126	627,135	626,584
Zain	344,437	368,943	361,249	367,675	374,718
STC	368,735	359,752	371,892	363,945	351,006

## Mobile Broadband subscriptions – (Postpaid)

Batelco	366,998	369,968	372,920	374,941	378,205
Zain	185,787	177,641	191,214	195,739	236,106
STC	420,459***	447,451	452,385	458,734	460,878
<b>Total**</b>	<b>2,317,171</b>	<b>2,334,647</b>	<b>2,397,786</b>	<b>2,388,169</b>	<b>2,433,567</b>

\* Excluding M2M

\*\* Increase in BTC prepaid Mobile BB is due to BTC revising definition to reflect subscriptions that had access to Internet in the last 90 days rather than 30 days previously (i.e. ITU definition).

\*\*\* STC Postpaid data amended from Q2 – Q4 2023.