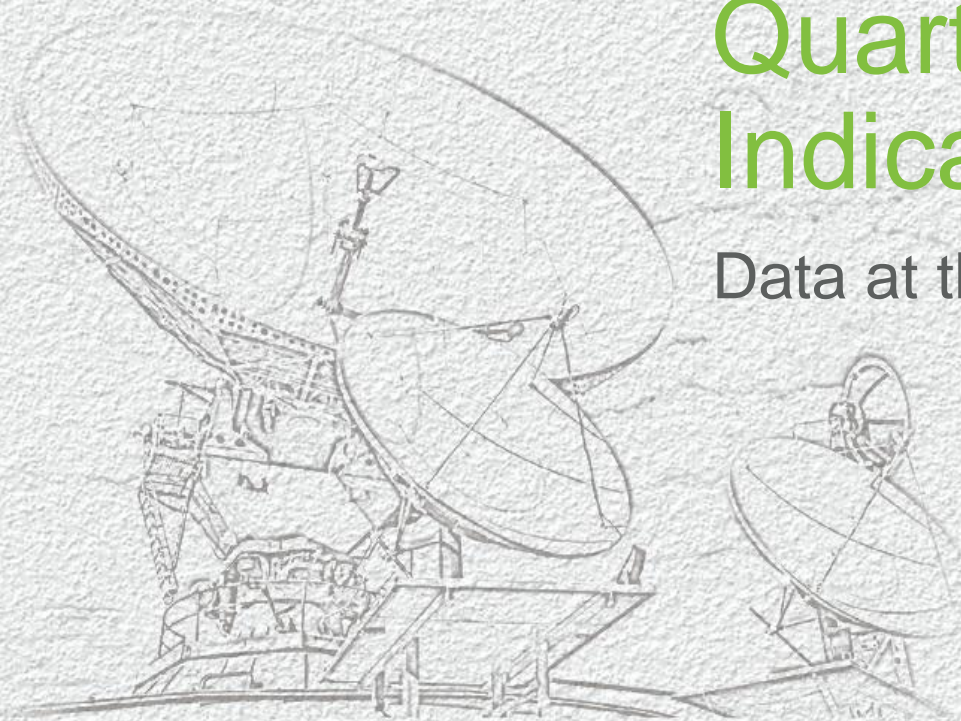




هيئة تنظيم الاتصالات
Telecommunications Regulatory Authority
Kingdom of Bahrain - مملكة البحرين

Quarterly Market Indicators






Data at the end of Q4 2014



2015



Content

	Disclaimer	Page 3
	Mobile services	Page 4
	Broadband services	Page 5
	Fixed telephony services	Page 6
	Definitions	Page 7



Disclaimer

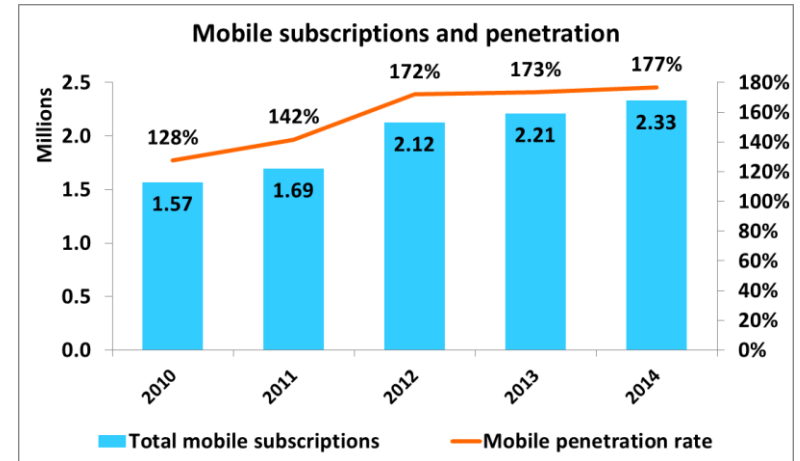
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Mobile services

- At the end of 2014, there were 2.33 million mobile subscriptions in Bahrain.
- Mobile penetration at the end of 2014 is 177%¹.
- The total number of mobile subscriptions increased by 5% between 2013 and 2014
 - Prepaid dropped by 2%
 - While postpaid increased by 17%
- At the end of 2014, prepaid mobile subscriptions represented 78% of total mobile subscriptions compared to 82% at the end of 2010.



Source: TRA analysis based on operators data.

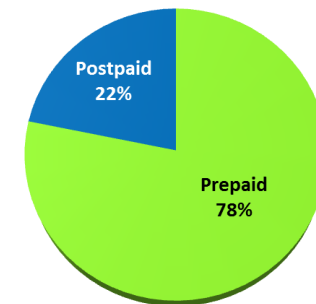
Note: Population used for calculating the penetration is based on Mid-Year Population Projections for the Kingdom of Bahrain based on CIO

Number of mobile subscriptions

	2010	2011	2012	2013	2014	Growth 2013-2014
Prepaid	1,289,274	1,379,820	1,720,958	1,777,864	1,821,364	2%
Postpaid	278,472	313,830	402,945	432,326	507,630	17%
Total	1,567,746	1,693,650	2,123,903	2,210,190	2,328,994	5%

Source: TRA analysis based on operators data.

Proportion of prepaid and postpaid subscriptions at the end of 2014

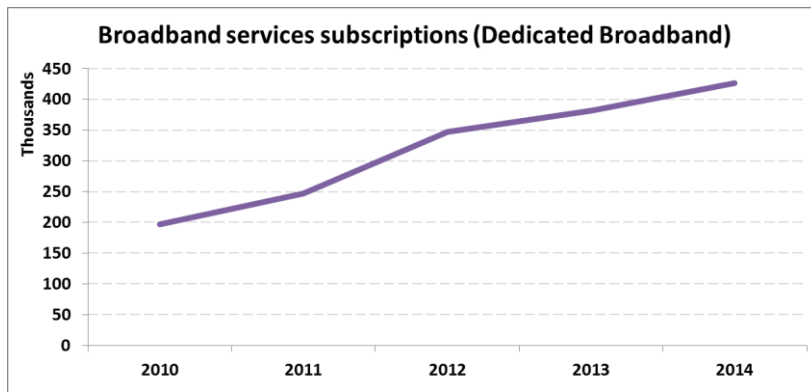


Source: TRA analysis based on operators data.

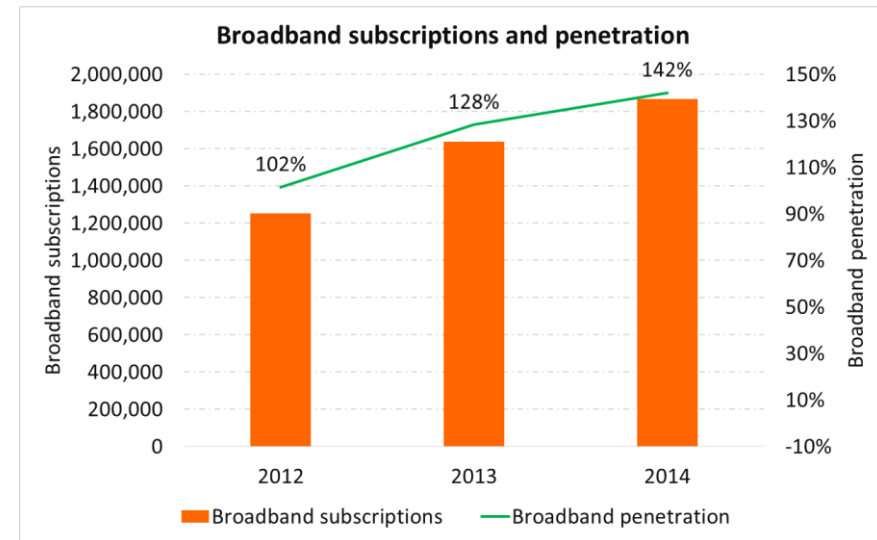


Broadband services

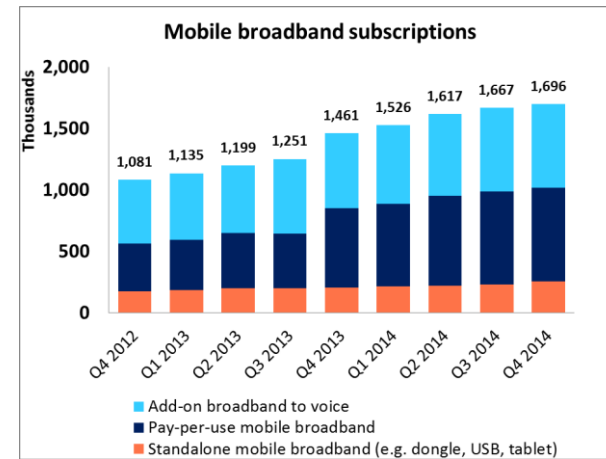
- At the end of 2014, there were 1.87 million broadband subscriptions, a 14% increase compared to 2013.
- Broadband penetration reached 142% at the end of 2014 compared to 129% in 2013 and 102% in 2012.
- Broadband subscription growth continues to be driven by growth in the number of mobile broadband subscriptions.
- Mobile broadband subscribers represented approximately 91% of total broadband subscribers at the end of 2014.
- At the end of 2014, there were 426,082 subscriptions for dedicated broadband services.
- Add-on broadband to voice and pay-per-use mobile broadband represent 85% of mobile broadband subscriptions at the end of Q4 2014.



Source: TRA analysis based on operators data.
Note: Include fixed wired, fixed wireless and standalone mobile broadband subscriptions.



Source: TRA analysis based on operators data.



Source: TRA analysis based on operators data.



Fixed telephony services



At the end of 2014 there were 242,000 Fixed-telephone lines compared to 251,000 in 2013 (drop by 4%).



The number of fixed (wired) telephone lines is showing a slight increase between 2013 and 2014 (1%),



while the number of fixed wireless fixed telephone lines (e.g. WiMax) dropped by 12% between 2013 and 2014.



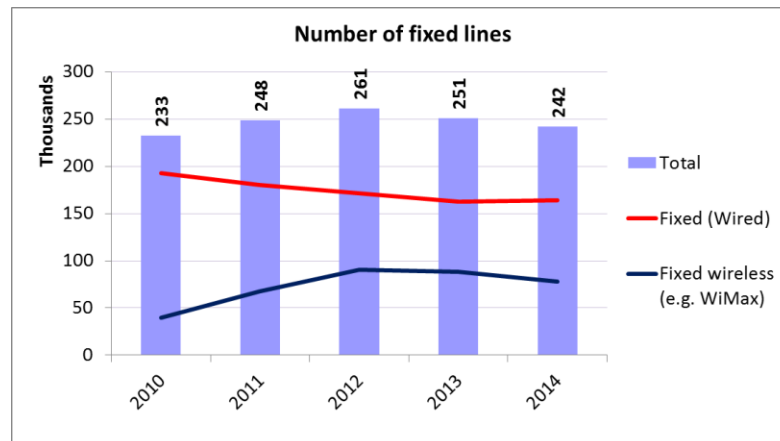
At the end of 2014, fixed wireless telephony (i.e. WiMax) represented 32% of total fixed lines, compared to 35% of the total fixed lines in the end of 2013.

Number of fixed lines

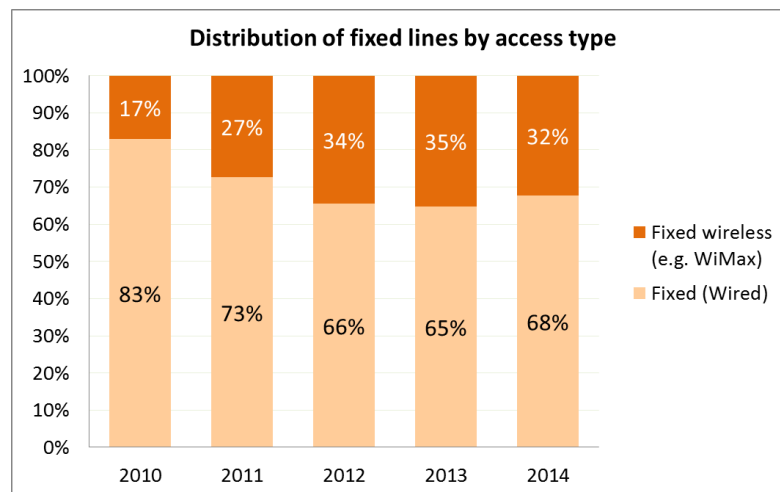
Fixed lines	2010	2011	2012	2013	2014	Growth 2013-2014
Fixed (Wired)	192,932	180,514	171,238	162,732	164,085	1%
Fixed wireless (e.g. WiMax)	39,626	67,966	90,122	88,342	78,005	-12%
Total	232,558	248,480	261,360	251,074	242,090	-4%

Source: TRA analysis based on operators data.

Note: Number of fixed lines Exclude ISDN subscriptions.



Source: TRA analysis based on operators data.



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>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!