

# Quarterly Market Indicators Report

**Q3 2023**

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# Main Telecom Market Indicators (Q3 2022- Q3 2023)

	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q3 2023
 Mobile subscribers	2,101,013	2,141,263	2,152,591	2,299,208	2,328,750
 Mobile penetration	134%	137%	136%	146%	148%
 Mobile prepaid subscriptions	1,429,186	1,442,499	1,447,023	1,505,994	1,512,500
 Mobile postpaid subscriptions	671,333	698,239	705,172	792,832	816,250
 Average outgoing minutes from mobile (Domestic & Inter.)	168	171	160	155	146
 Fixed telephony subscriptions	219,252	217,077	216,678	215,233	214,355
 Fixed telephony penetration (Excluding ISDN)	14%	13.8%	13.7%	13.6%	13.6%
 Domestic monthly average minutes per line*	57	58	55	52	52
 International outgoing minutes (Mobile)	247,953,561	240,338,321	217,124,126	215,140,781	191,298,994
 International outgoing minutes (Fixed telephony)	2,123,794	2,162,818	2,321,273	1,741,692	1,556,065
 Mobile broadband subscriptions	2,289,066	2,319,717	2,304,132	2,255,279	2,258,752
 Mobile broadband penetration rate	145.1%	147.1%	146.1%	143%	143.2%
 Fiber broadband subscriptions	164,607	165,422	167,434	167,948	168,161
 Fiber broadband penetration per household**	64%	64%	65%	65%	65%
 Total data usage (Petabyte)	388	401	417	429	416
 Average total data usage per month per subscription	52	54	56	60	57

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

4 \*\*Fixed Broadband penetration is based on the latest available number of households provided by IGA. Number of households was last updated in 2022.

# Main Telecom Market Indicators for Q3 2023



Mobile subscribers: **2,328,750**  
Penetration: **148%**

Average Int. & Domestic minutes per month per mobile subscription: **146**

Average data usage per mobile broadband subscription\*: **12.5**

Fixed telephony subscriptions (Exclud. ISDN): **214,355**

Penetration: **13.6%**

Fixed Wired Telephony subscriptions **95%**

Fixed Wireless Telephony subscriptions: **5%**

Mobile Broadband subscriptions: **2,258,752**

Mobile Broadband penetration rate: **143.2%**

Fiber Broadband subscriptions: **168,161**

Fiber Broadband penetration rate per household: **65%\*\***



Mobile Prepaid subscriptions: **1,512,500**

Mobile postpaid subscriptions: **816,250**

% of prepaid out of Mobile market subscriptions: **65%**

% of postpaid out of Mobile market subscriptions : **35%**

Domestic monthly average minutes per line: **52**

International Outgoing Minutes (Mobile): **191,292,046**

International Outgoing Minutes (Fixed telephony): **1,556,065**



Total Data Usage: **416 Petabyte**

Fiber Broadband Traffic: **268 Petabyte**

Avg. Traffic per broadband subscription per month: **57 GB**

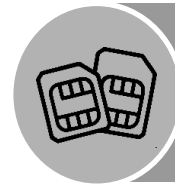
Avg. Fiber Broadband Traffic per month: **523 GB**

\*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 Q3 2023)

**2,328,750 Subscriptions**

148% Penetration rate

Q3 2022

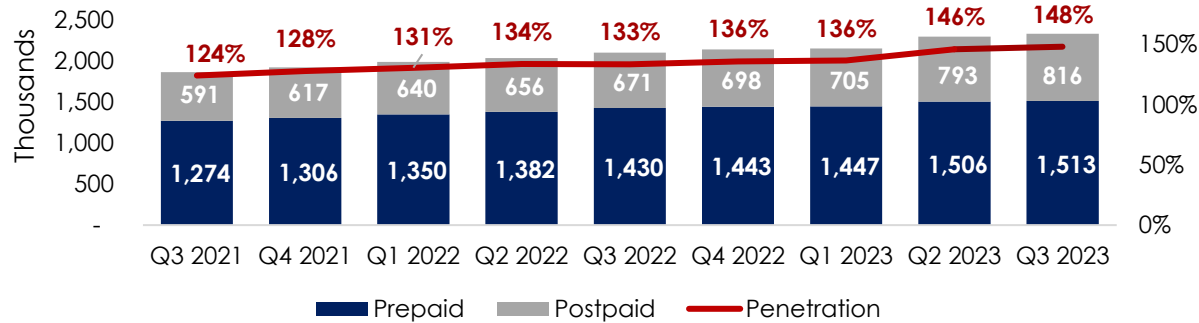
**2,101,013**

Q3 2023

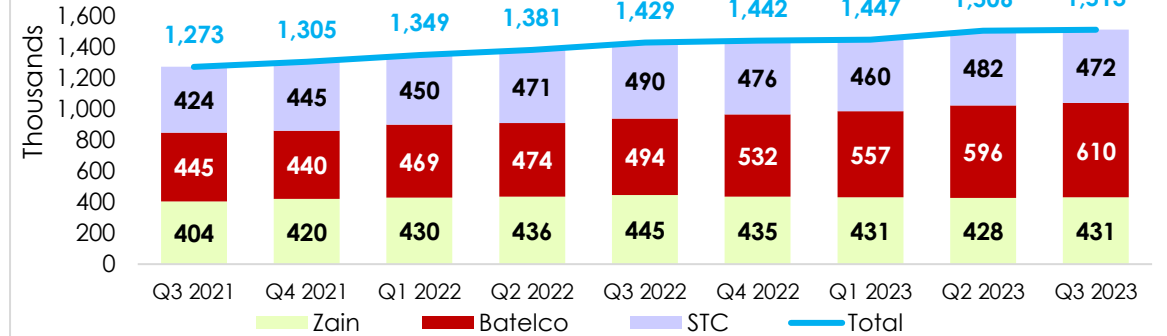
**2,328,750**

**11%**

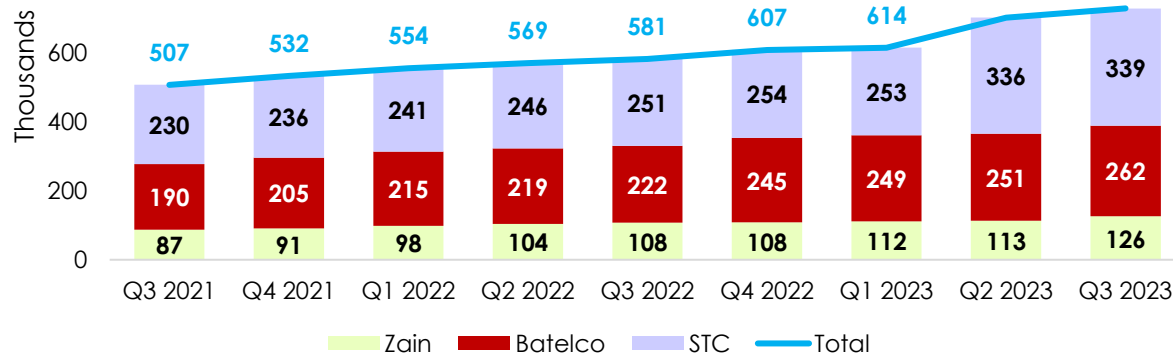
Number of Mobile Subscriptions & penetration



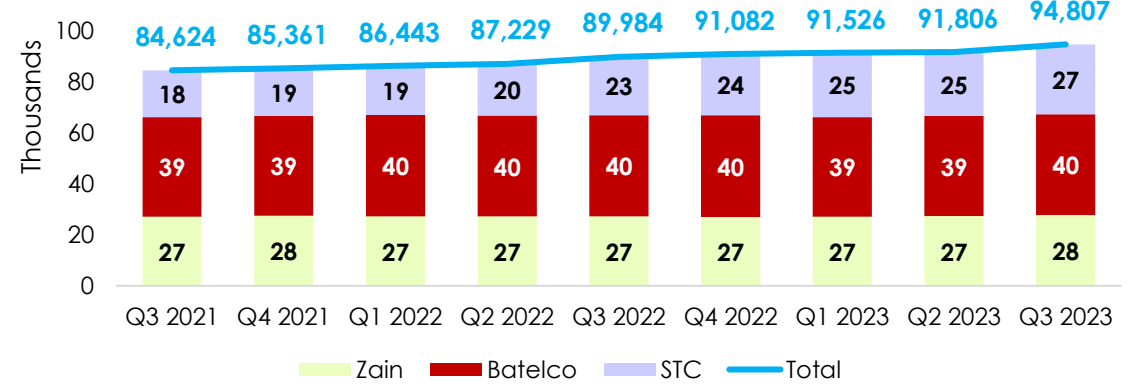
Prepaid subscribers - Residential\*\*



Postpaid subscribers - Residential



Postpaid subscribers - Non Residential



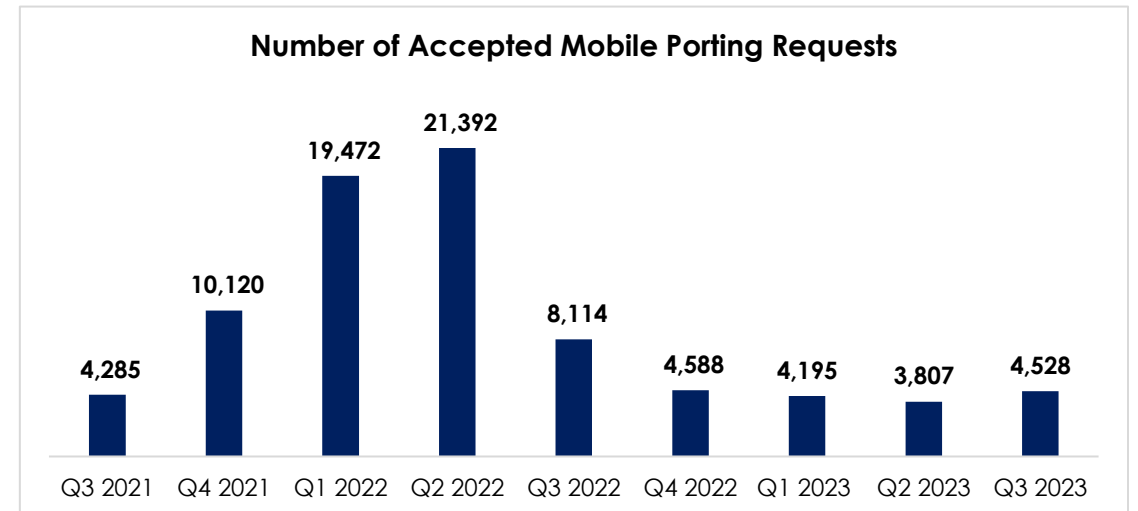
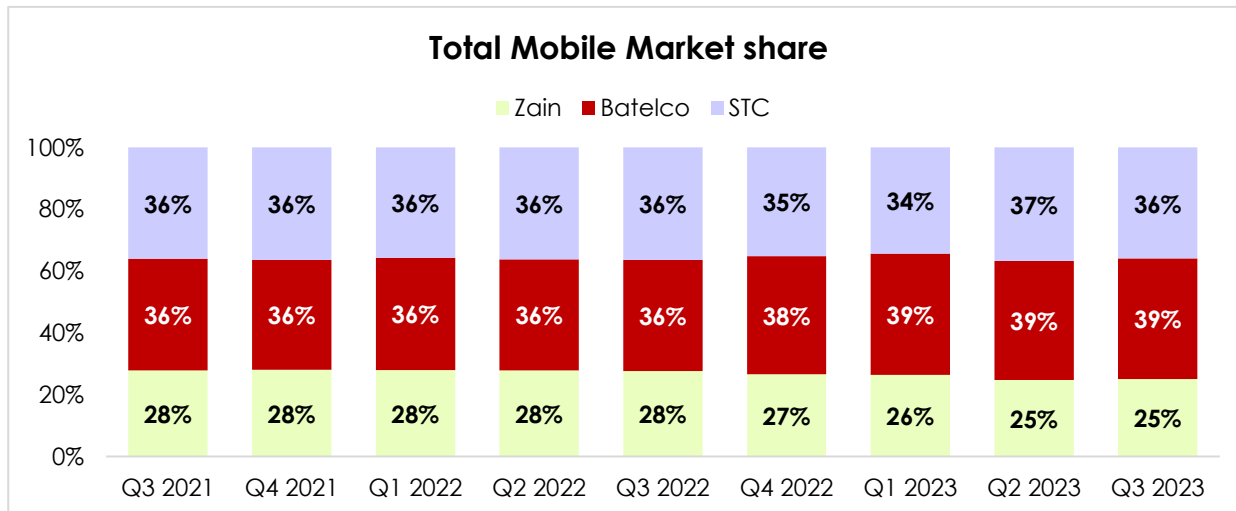
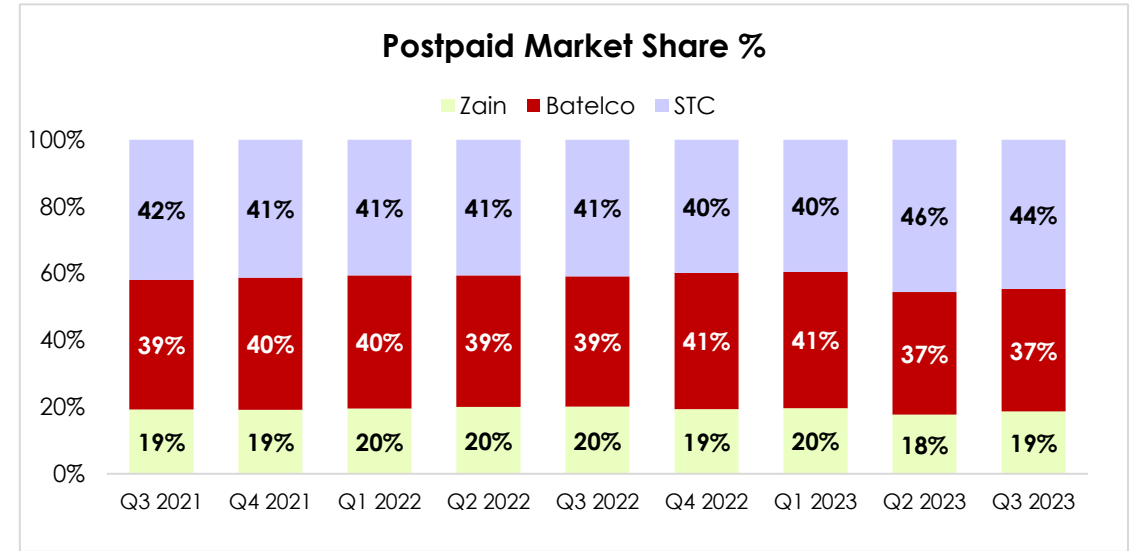
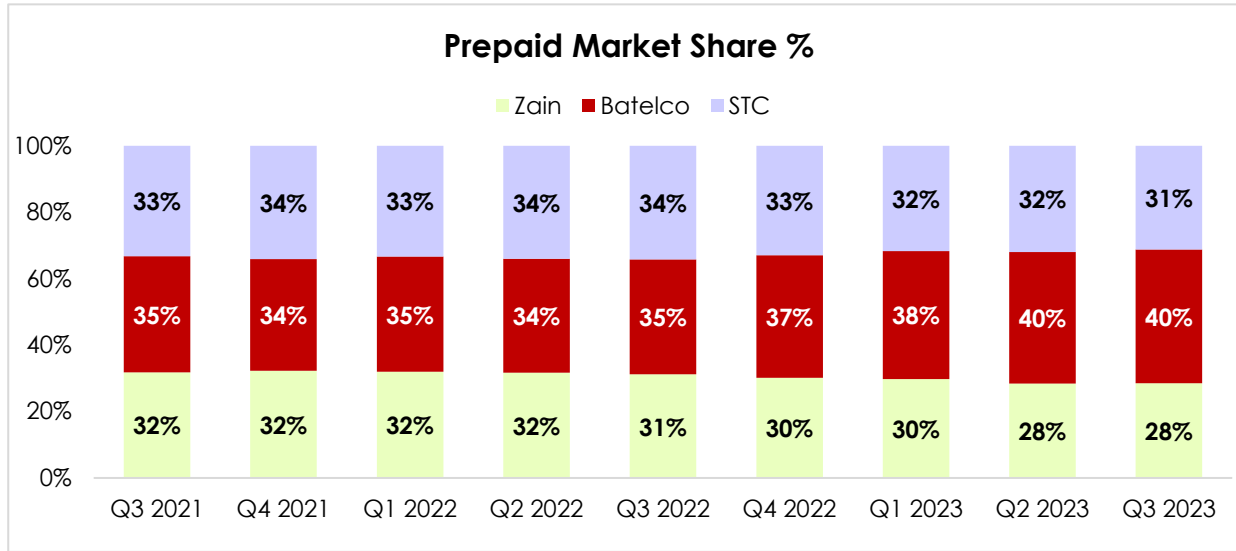
Population***	2020	2021	2022	2023
By IGA	1,472,204	1,504,365	1,565,000	1,577,059

\* Data for Prepaid Non-residential subscribers not yet available for 3/3 MNOs.

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

\*\*\* Source: <https://www.bna.bh/en/HRHtheCrownPrinceandPrimeMinisterchairstheweeklyCabinetMeeting.aspx?cms=q8FmFJgiscL2fwlzON1%2BDIHlz%2BofVmjO4F61CX7bmsQ%3D>

# Mobile services: Subscriptions (2/2)



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



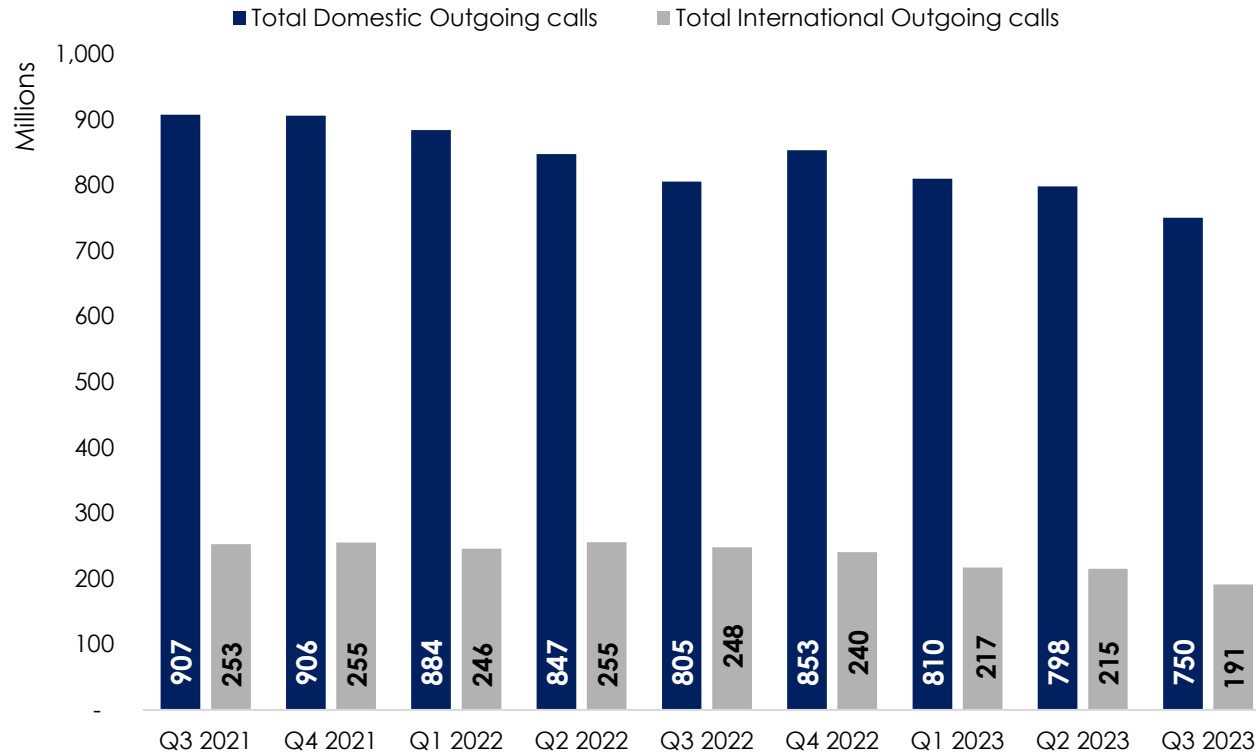
Total Outgoing Traffic in Minutes  
(Domestic + International)\*

▼ 11%

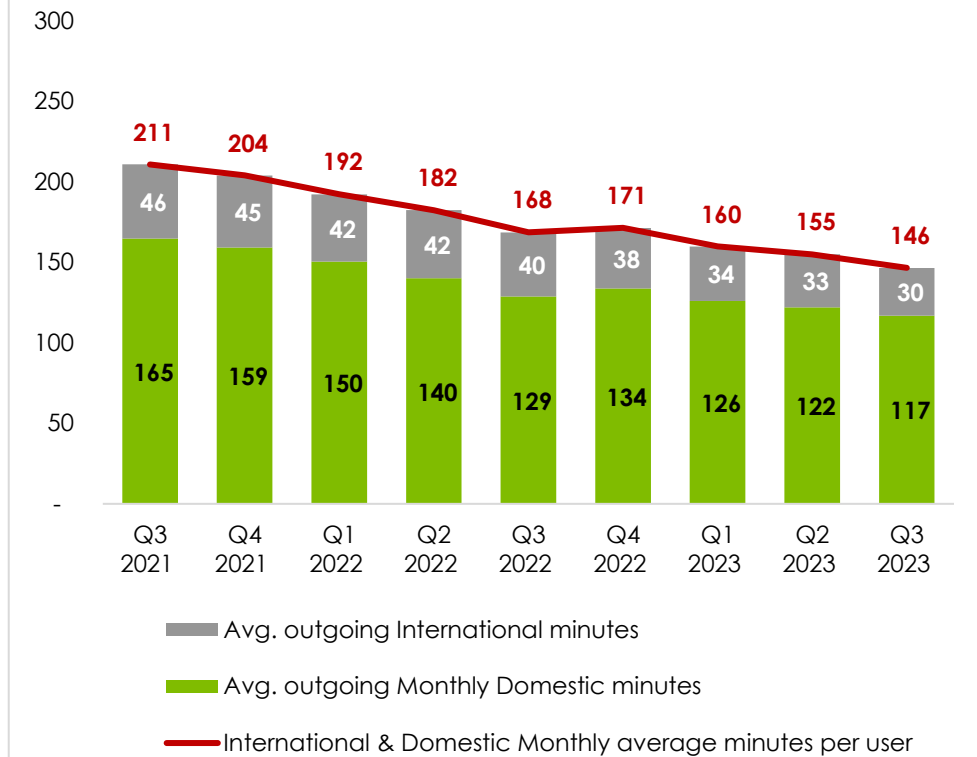
Q3 2022  
**1,053,235,914**

Q3 2023  
**941,501,965**

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

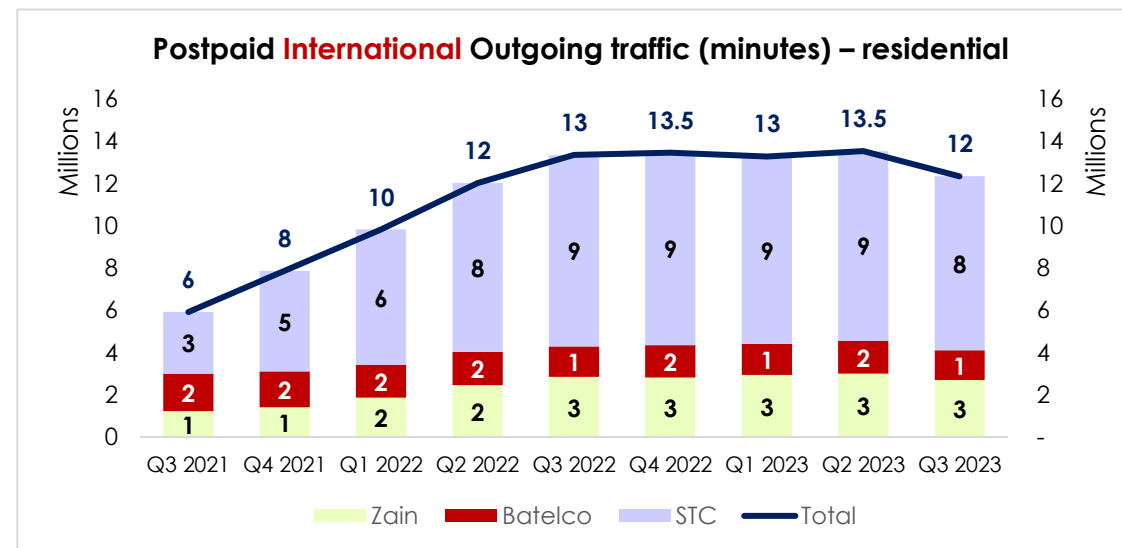
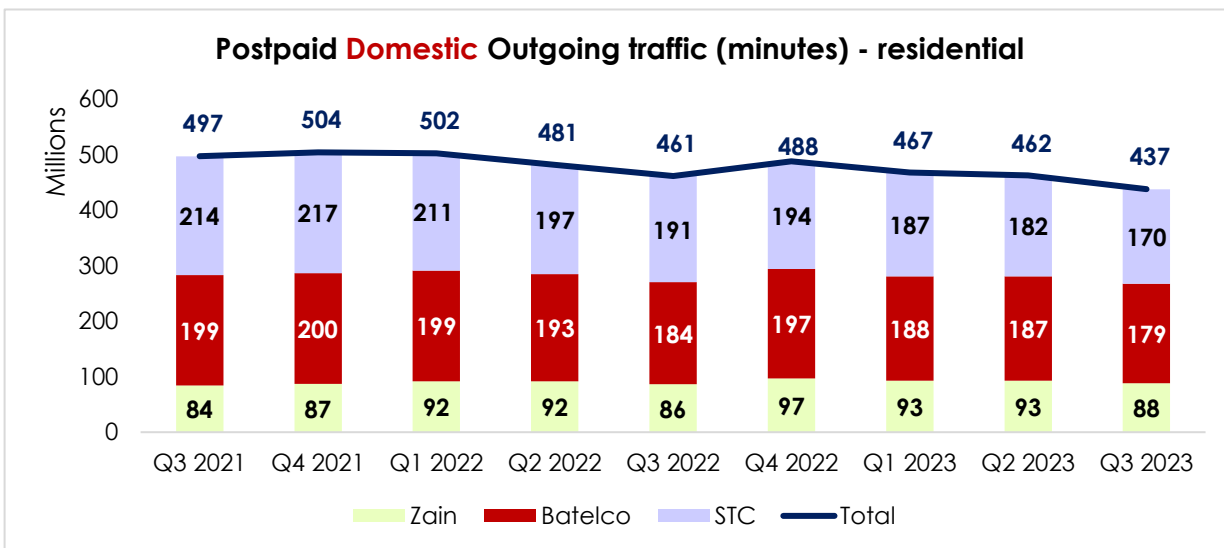
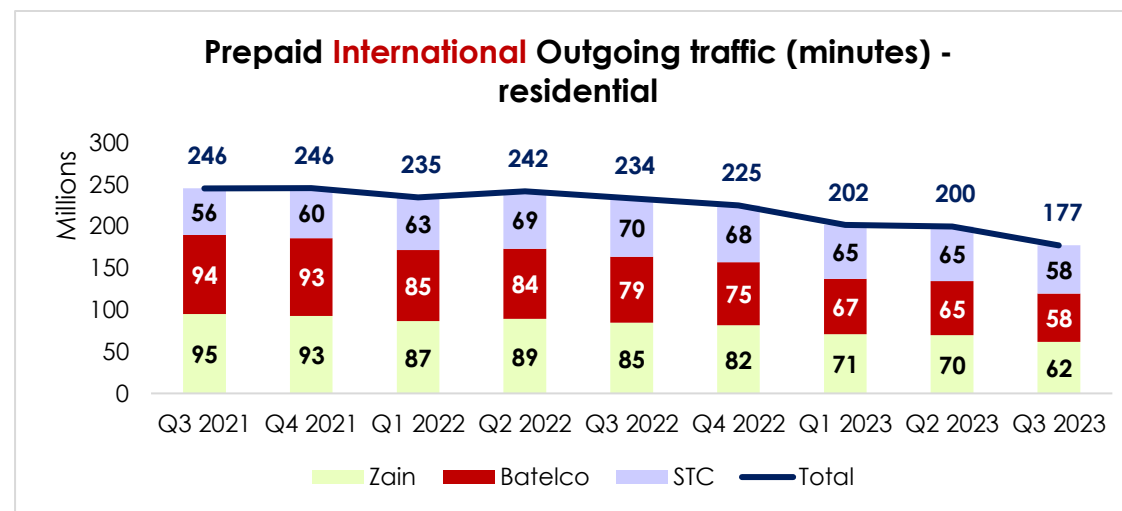
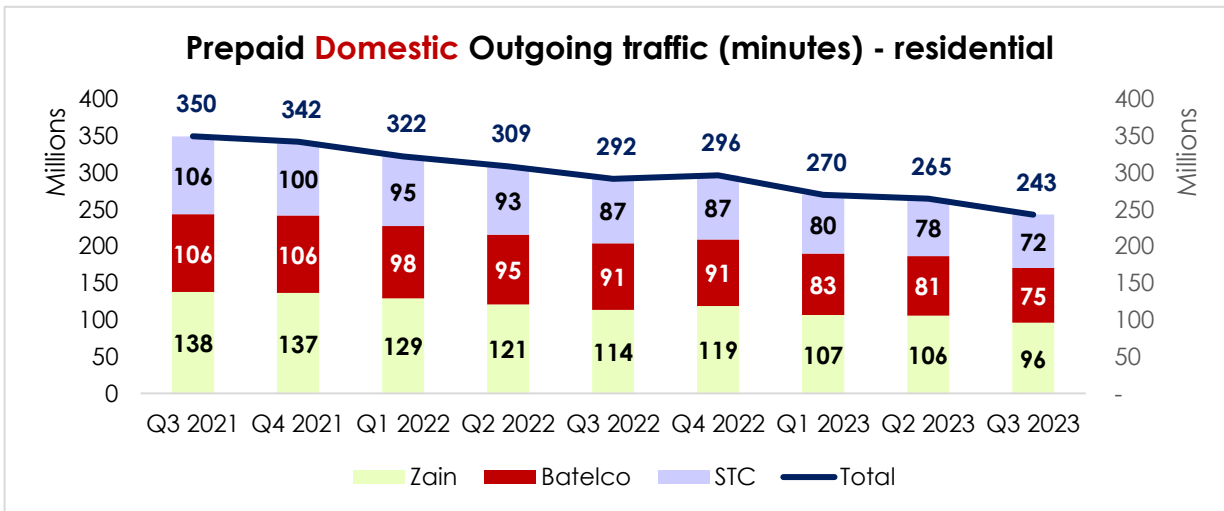


Average Monthly Minutes per User





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

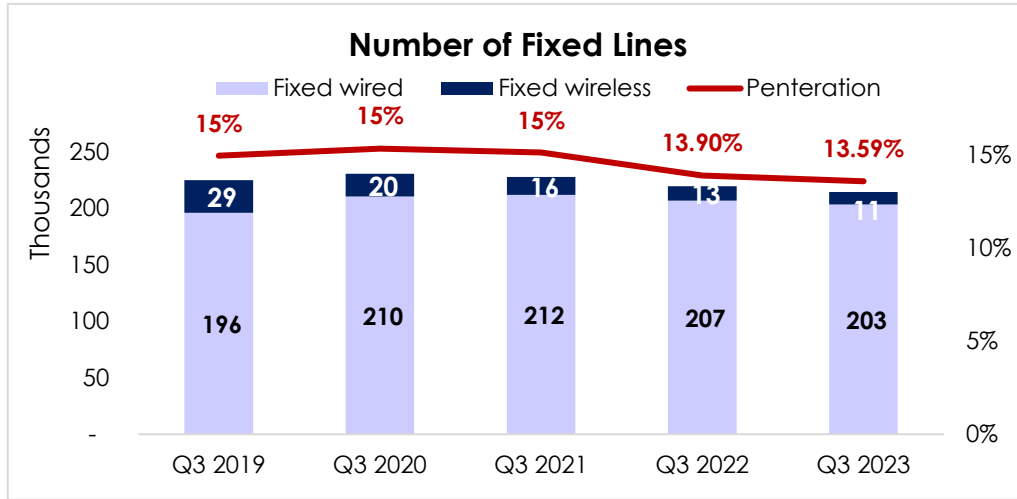


\* Historical data for Non-residential (Domestic & Intl.) Traffic is currently unavailable.

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

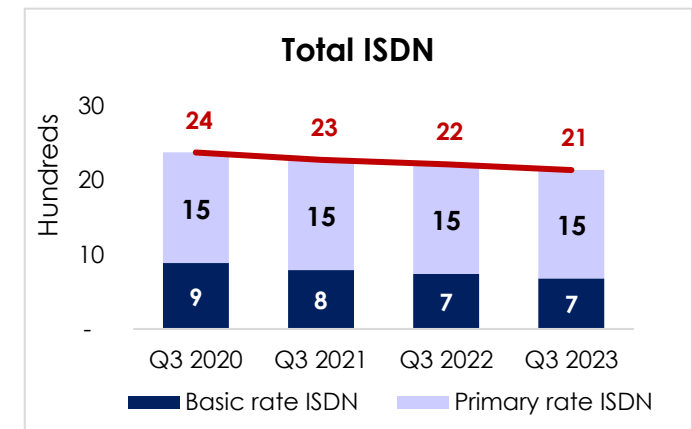
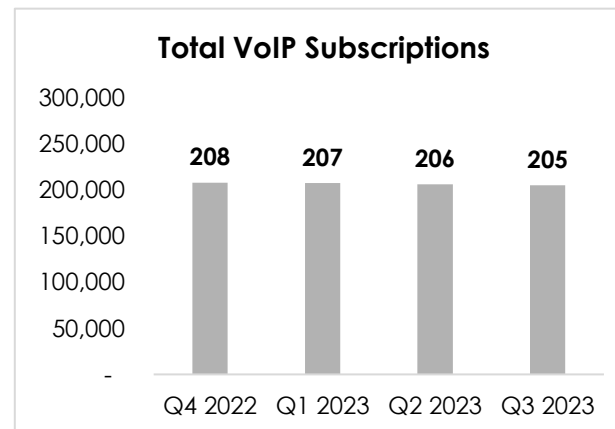
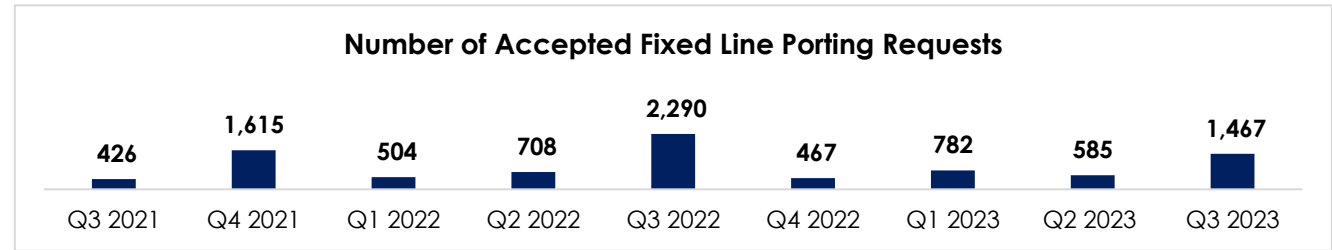
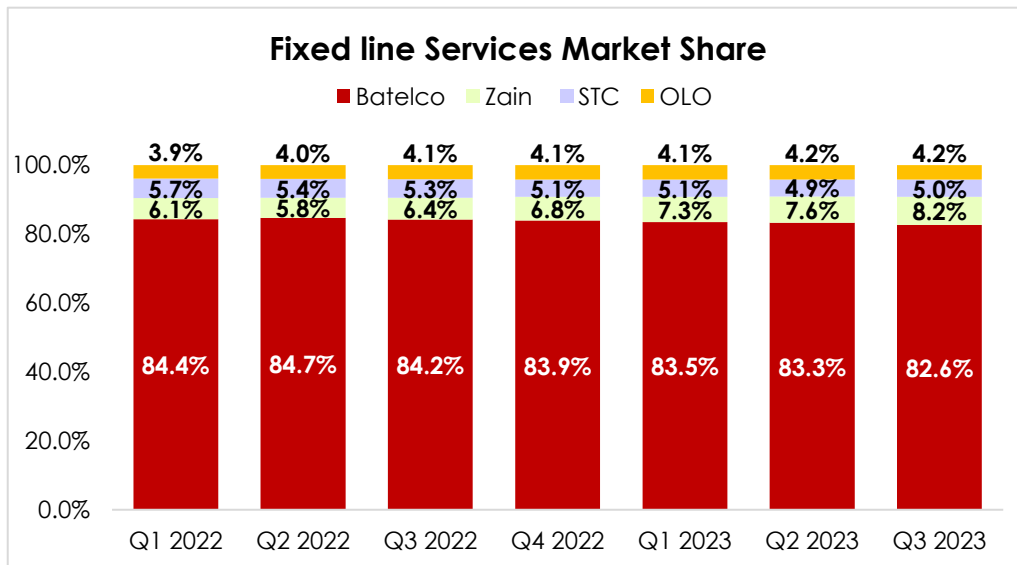


No. of fixed telephony subscriptions  
(Excluding ISDN)



End of Q3 2022	End of Q3 2023
<b>219,252</b>	<b>214,355</b>
14% Penetration rate	13.6% Penetration rate

	2019	2020	2021	2022	Q3 2023
<b>Q3 2023</b>	<b>224,962</b>	<b>228,121</b>	<b>227,133</b>	<b>217,077</b>	<b>214,355</b>
% of Fixed Wired	88%	92%	93%	95%	95%
% of Fixed Wireless	12%	8%	7%	5%	5%



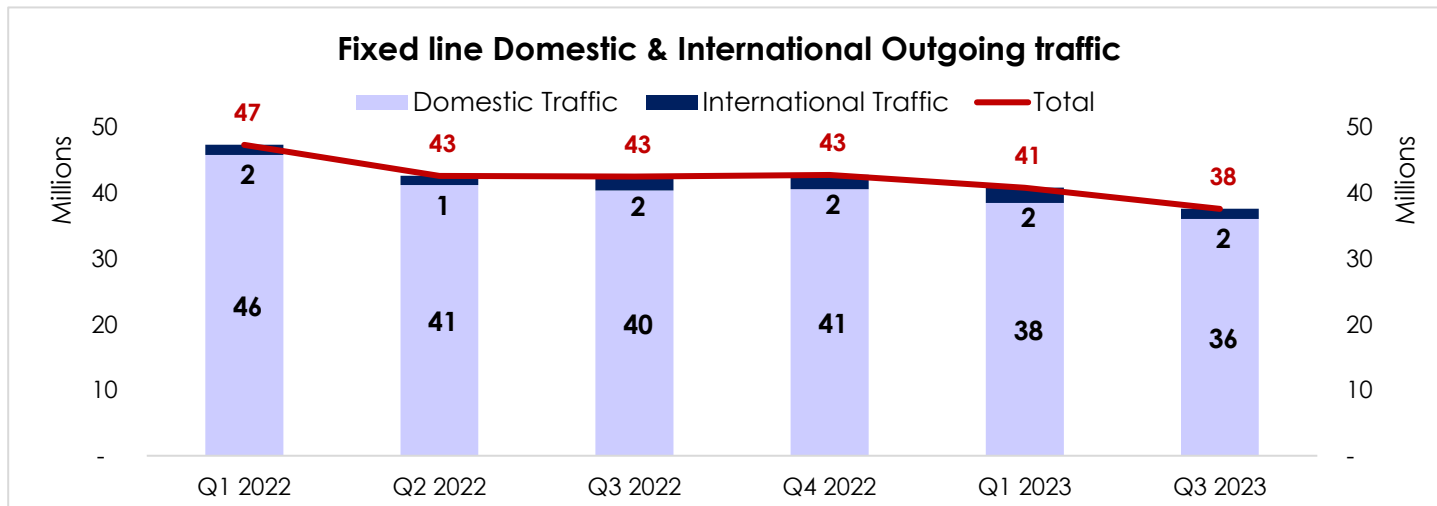
\* Includes VoIP as of 2021 but excludes ISDN.

\*\* In 2023, an operator merged its TDD and FDD subscriptions under one figure, hence the drop shown under Fixed wireless subscriptions.

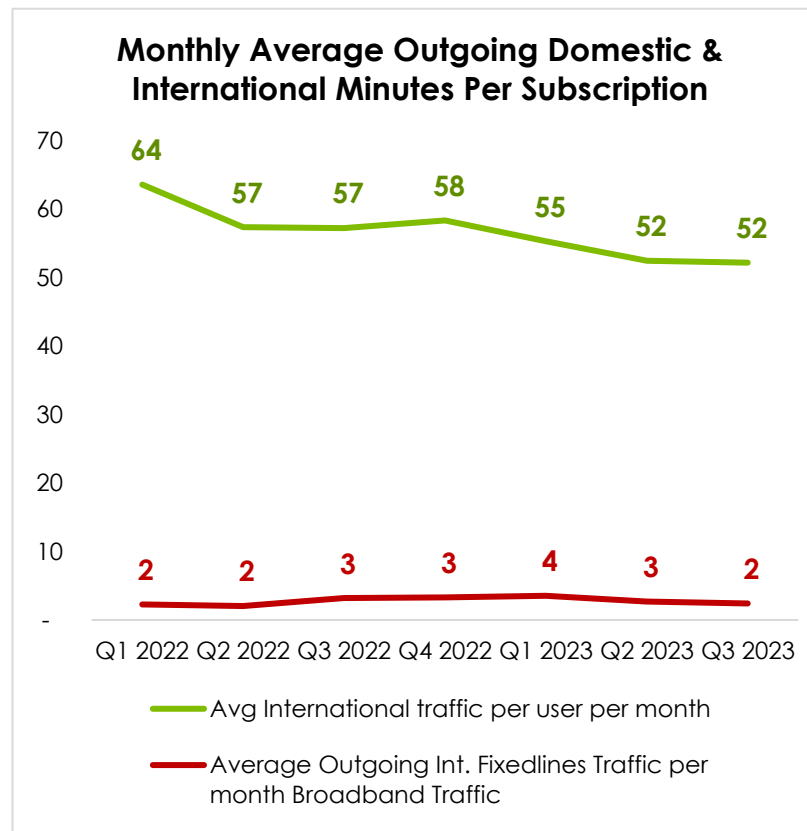
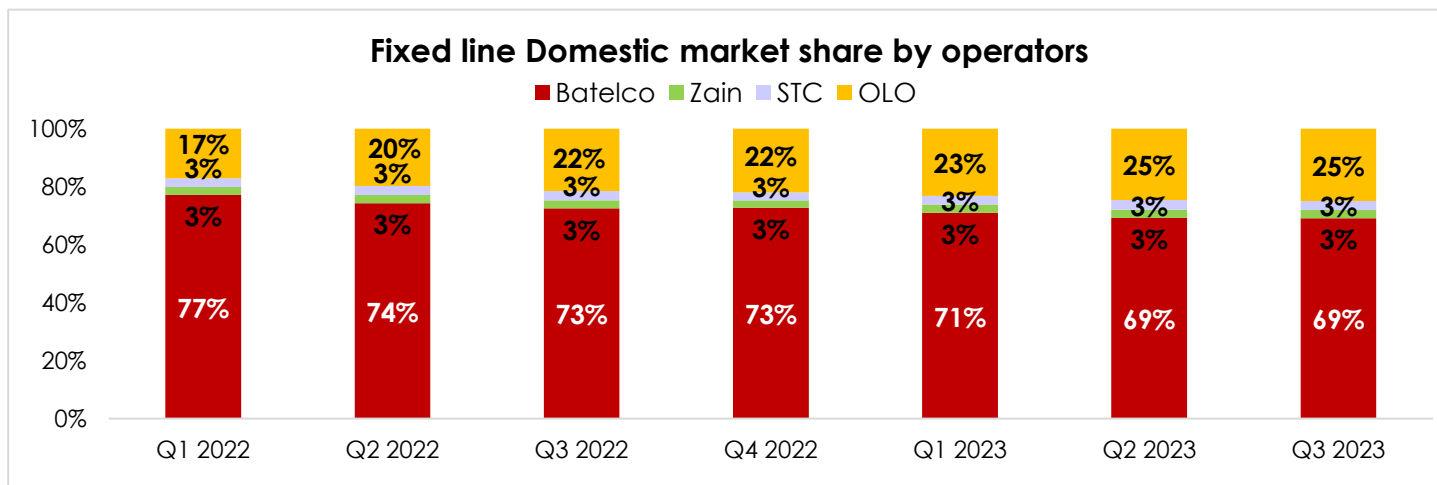
# Fixed telephony services: Traffic (PSTN & Wireless - Minutes)\*



Total fixed domestic outgoing traffic in minutes\*\*



Q3 2022	Q3 2023
<b>40,378,996</b>	<b>36,035,026</b>



\* Includes VoIP and ISDN traffic.

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



No. of broadband subscriptions (End of Q3 2023)

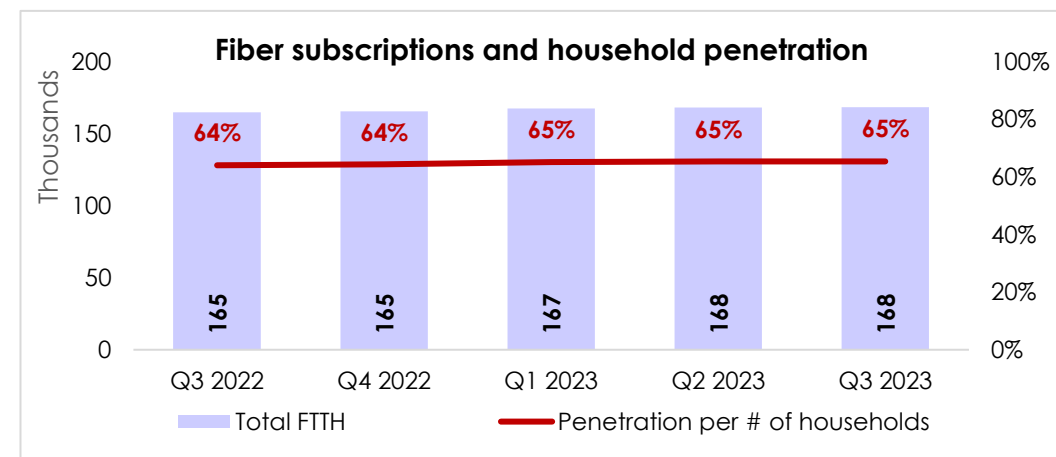
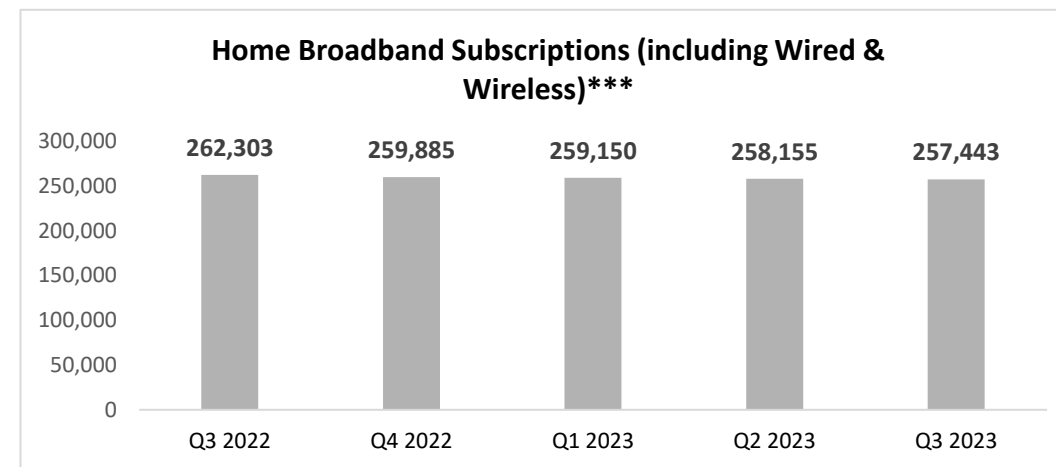
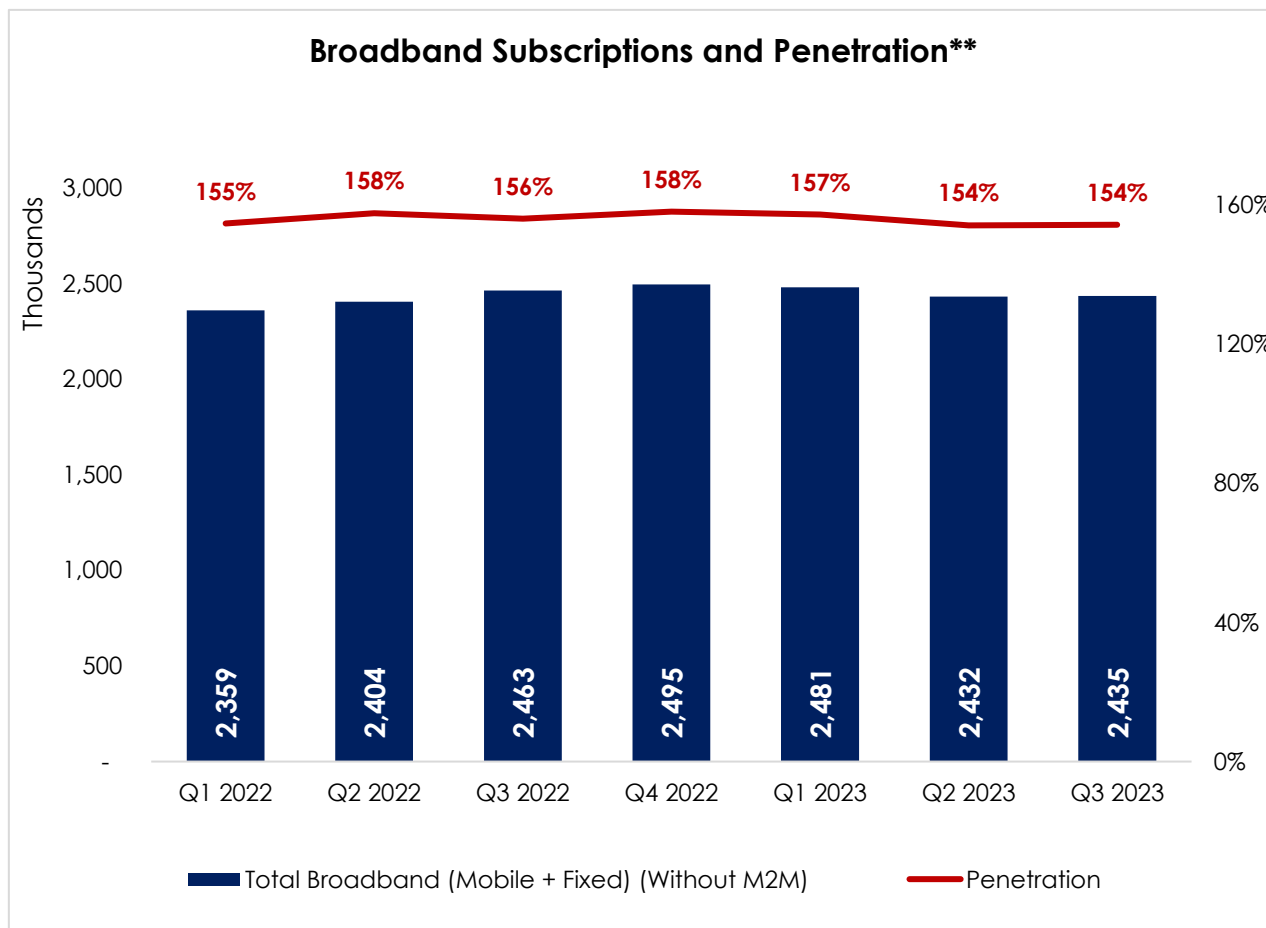
**2,435,485**

154% Penetration rate

Q3 2022  
**2,463,106**

Q3 2023  
**2,435,485**

▼  
**1%**



\* Doesn't include M2M.

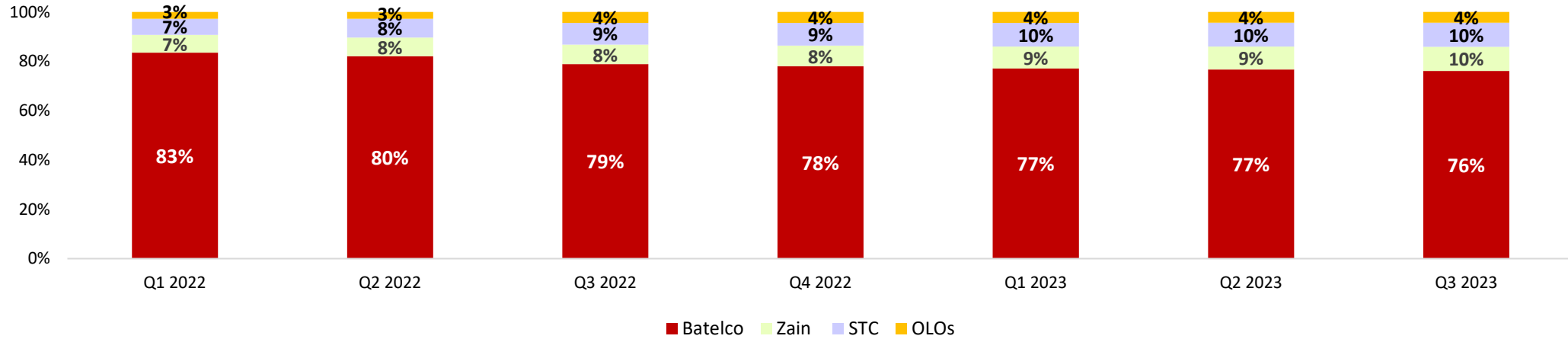
\*\* Mobile broadband data is currently under review.

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

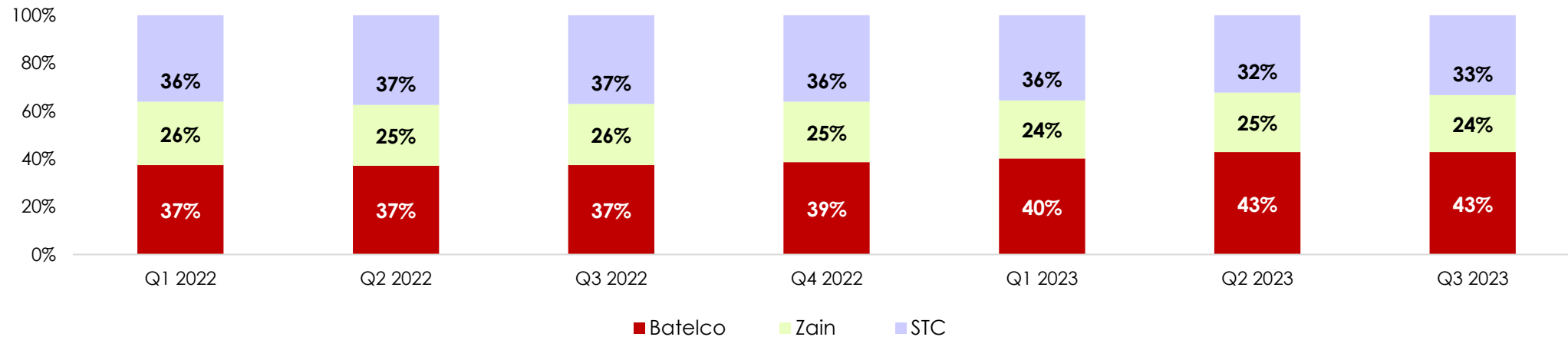
\*\*\*\* Number of households is based on the latest IGA data in 2021.

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

### Fiber Broadband Subscriptions Market Share



### Mobile Broadband Subscriptions Market Shares



# Broadband services: Data Traffic 1 of 2

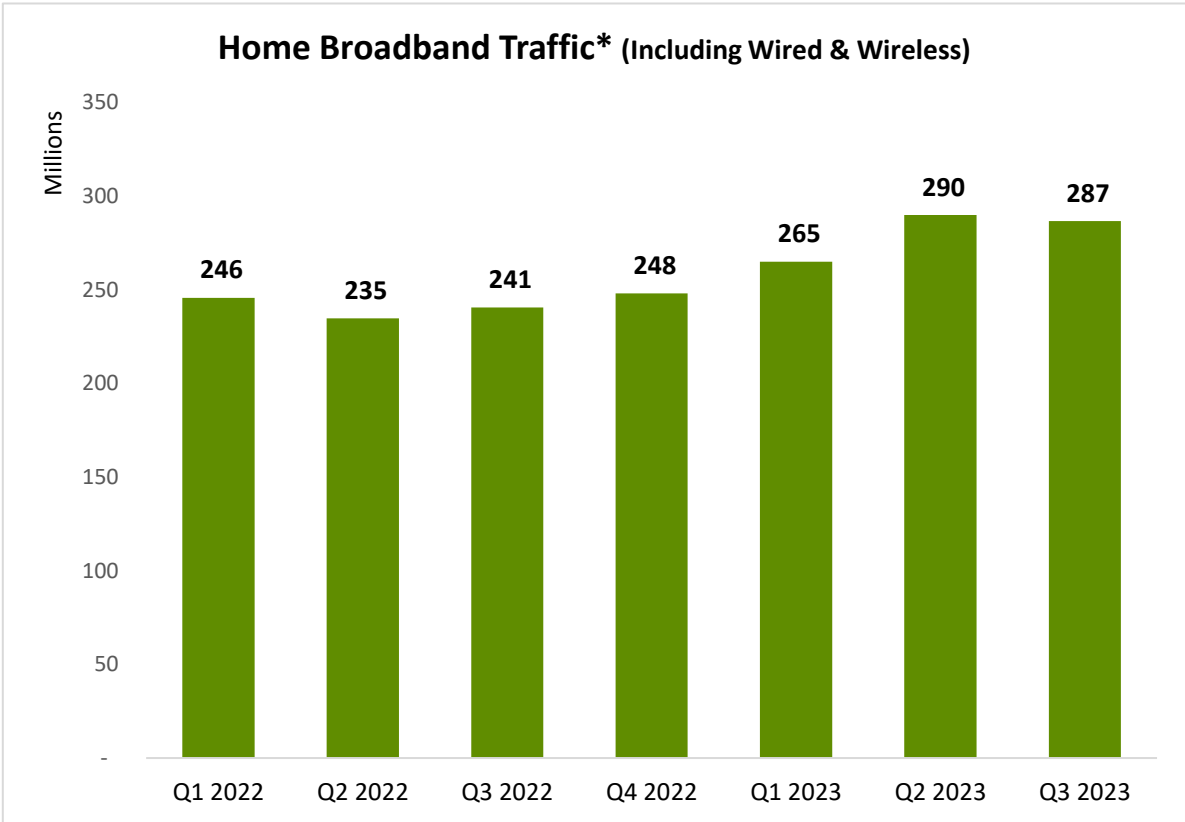
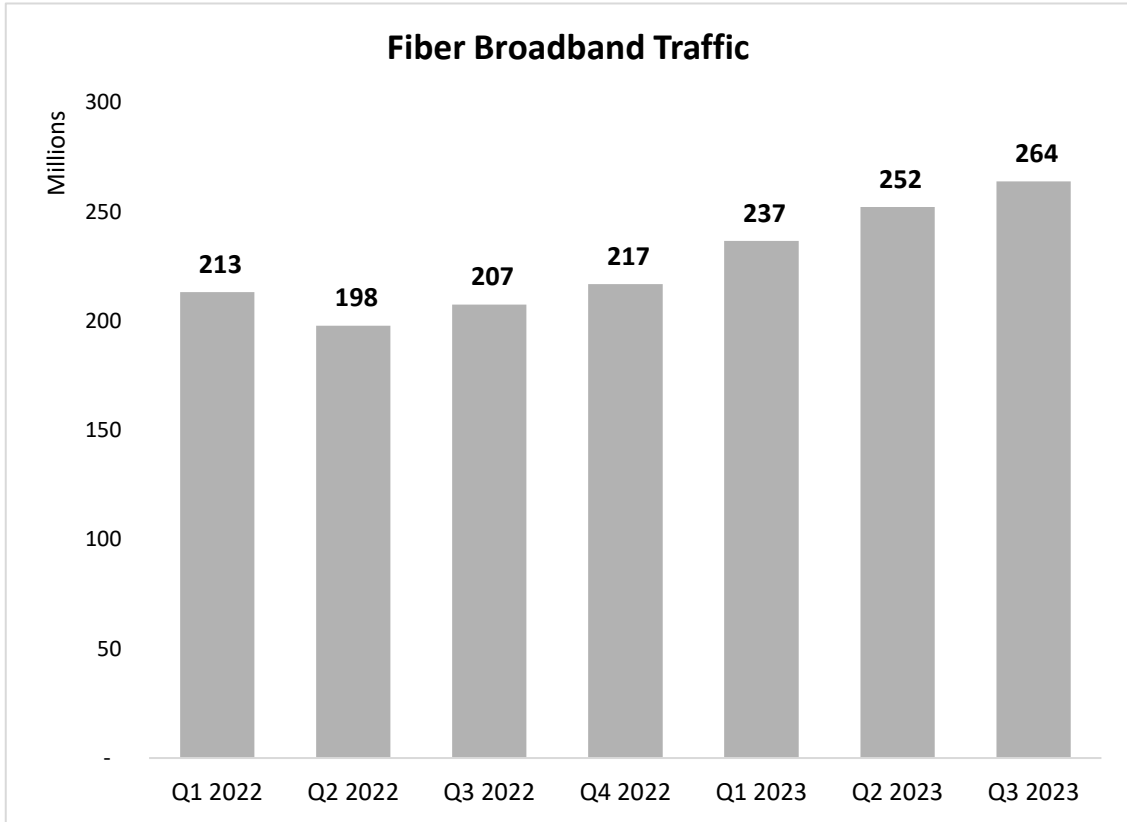


Total data traffic in Gigabyte

Q3 2022  
**388,701,856**

Q3 2023  
**416,570,594**

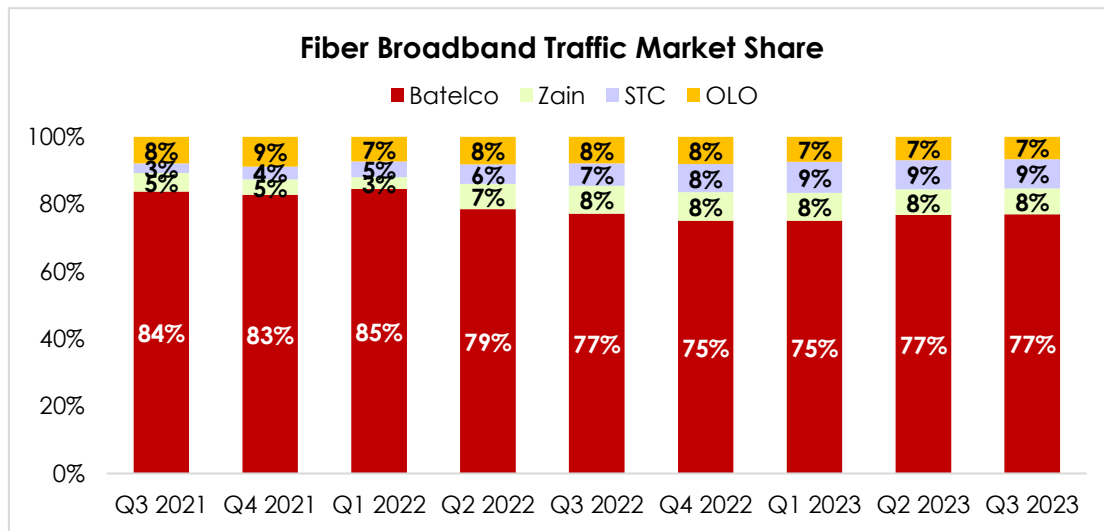
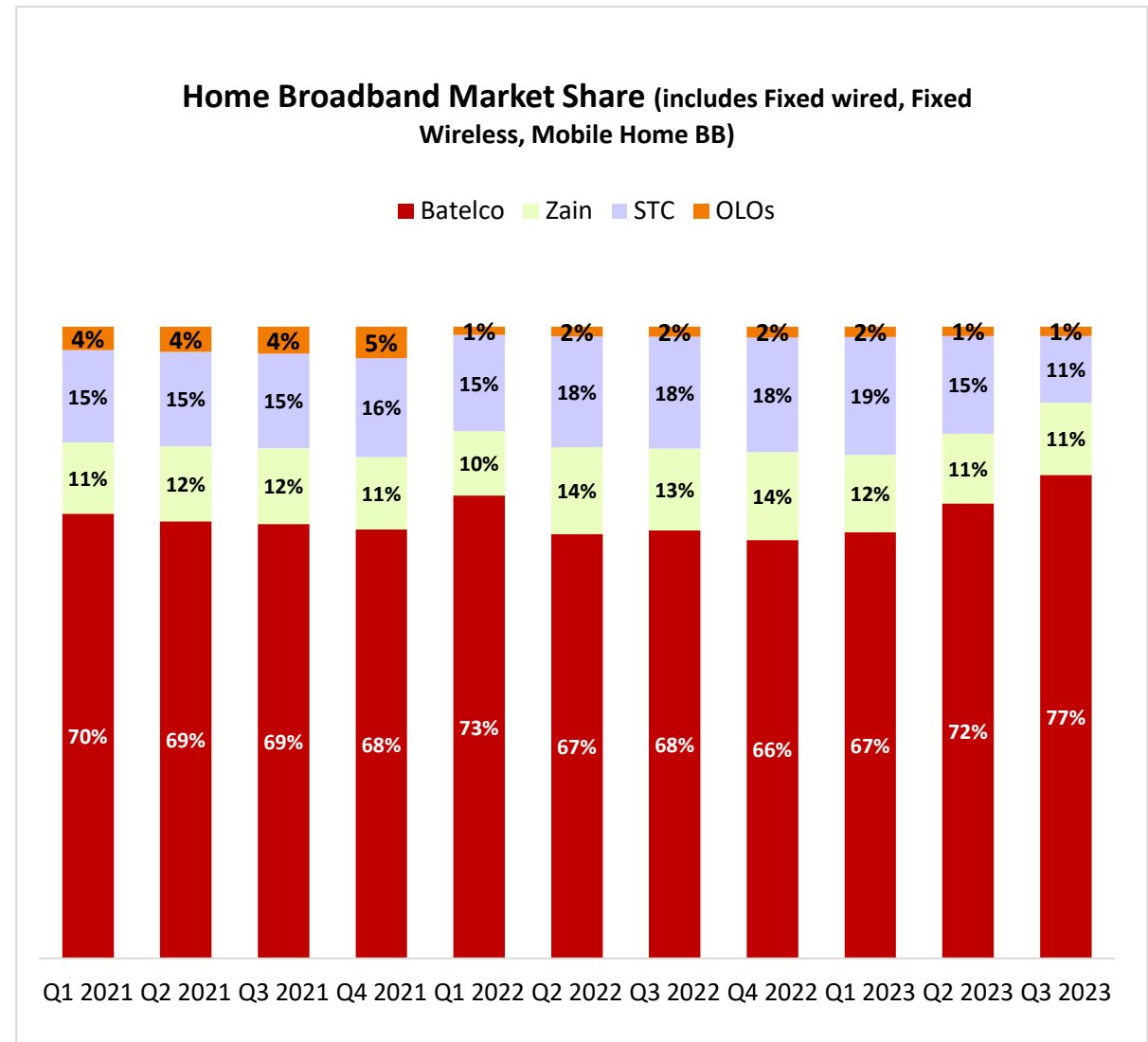
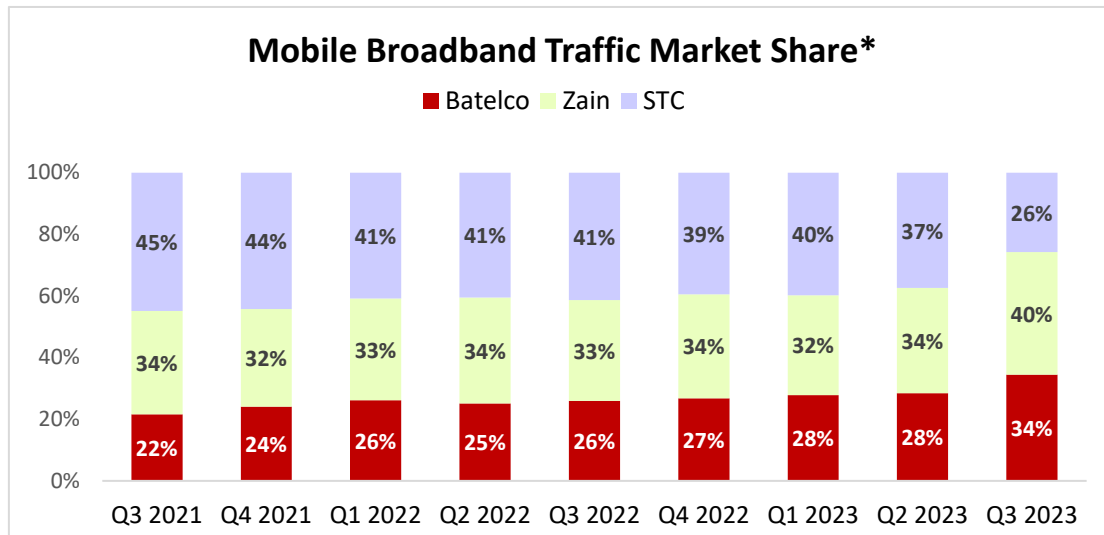
▲  
**7%**



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

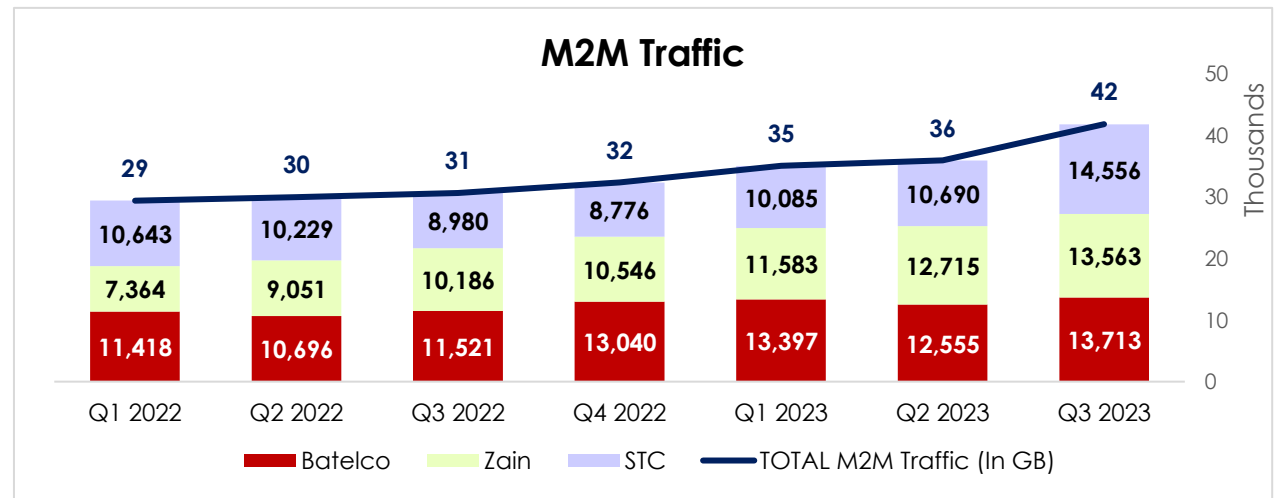
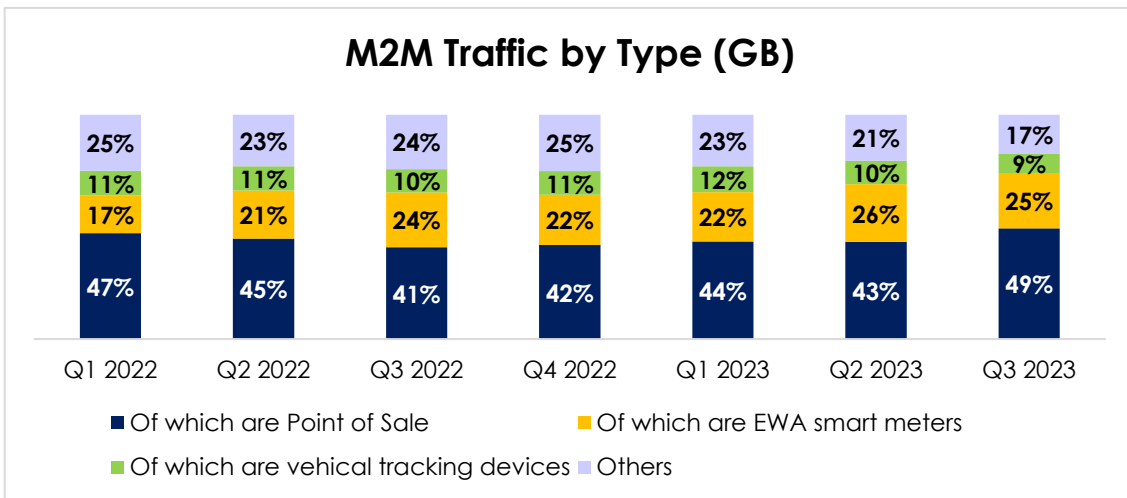
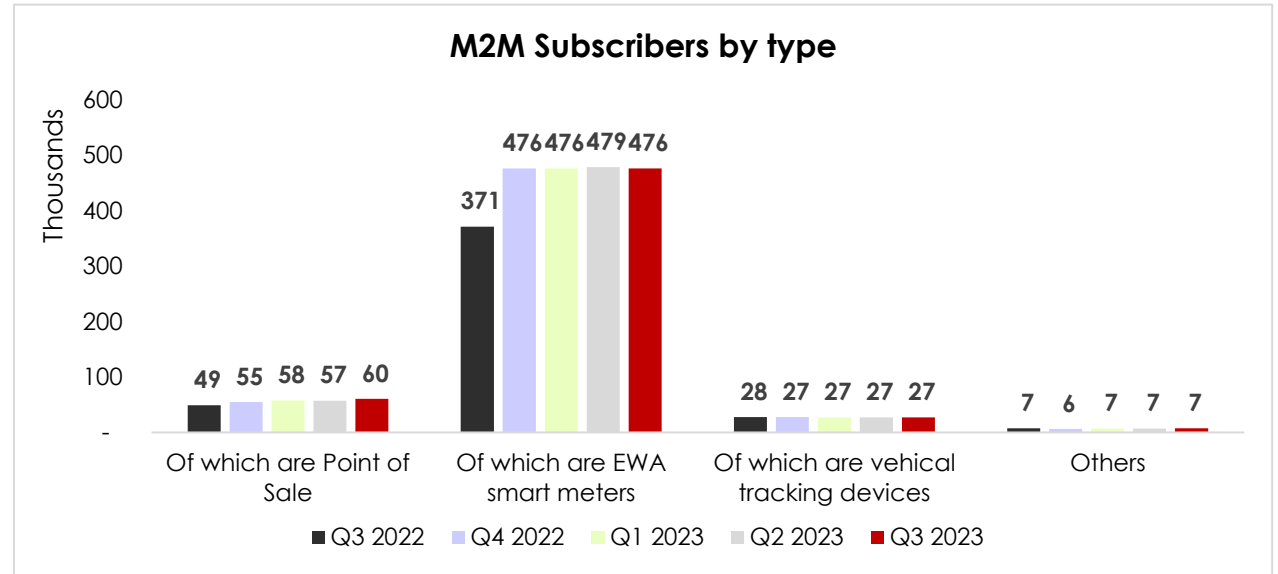
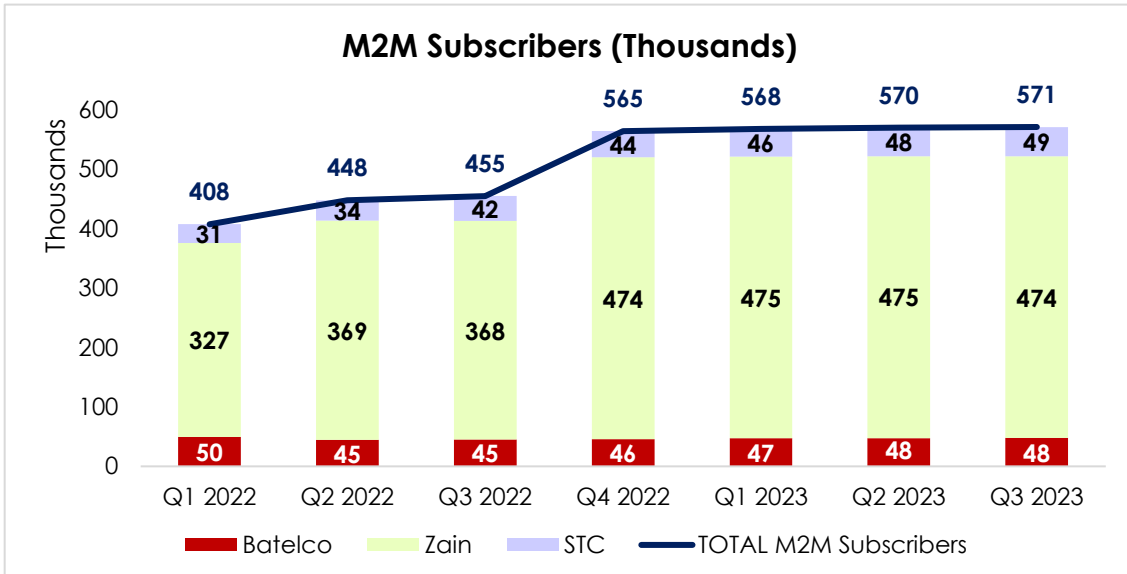
\*\* Mobile broadband traffic is currently under review.

# Broadband services: Data Traffic 2 of 2



\*STC figures are under review and are therefore subject to change.

# M2M Subscribers & Traffic





# 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 residential subscribers						Prepaid non-residential subscribers*				
	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q3 2023	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q3 2023
Batelco	494,067	532,275	556,874	595,732	609,640	N/A	N/A	N/A	N/A	N/A
Zain	445,257	434,705	430,642	427,940	430,924	494	525	396	382	N/A
STC	489,862	475,519	459,507	482,322	471,936	N/A	N/A	N/A	N/A	N/A
<b>Total</b>	<b>1,429,186</b>	<b>1,442,499</b>	<b>1,447,023</b>	<b>1,505,994</b>	<b>1,512,500</b>	<b>494</b>	<b>525</b>	<b>396</b>	<b>382</b>	<b>0</b>
Postpaid residential subscribers						Postpaid non-residential subscribers				
	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q3 2023	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q3 2023
Batelco	222,288	244,879	248,746	251,457	262,205	39,797	39,851	39,100	39,328	39,561
Zain	107,815	108,322	111,551	113,295	126,083	27,253	27,109	27,145	27,386	27,784
STC	251,246	253,956	253,349	336,274	333,155	22,934	24,122	25,281	25,092	27,462
<b>Total</b>	<b>581,349</b>	<b>607,157</b>	<b>613,646</b>	<b>701,026</b>	<b>721,443</b>	<b>89,984</b>	<b>91,082</b>	<b>91,526</b>	<b>91,806</b>	<b>94,807</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)

	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q3 2023
Batelco	129,651	128,325	127,599	126,485	125,047
Zain	12,690	13,381	14,189	14,771	15,673
STC	8,515	7,991	7,972	7,768	7,850

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

Batelco	54,968	53,891	53,386	52,710	52,065
Zain	1,279	1,459	1,555	1,673	1,825
STC	3,165	3,044	2,991	2,840	2,909
OLOs*	8,984	8,986	8,986	8,986	8,986
<b>Total**</b>	<b>219,252</b>	<b>217,077</b>	<b>216,687</b>	<b>215,158</b>	<b>214,355</b>

\* Includes residential & non-residential

\*\* Excluding ISDN.

	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q3 2023
Basic-rate ISDN	740	718	715	705	680
Primary-rate ISDN	1,470	1,467	1,459	1,468	1,455
<b>Total</b>	<b>2,210</b>	<b>2,185</b>	<b>2,174</b>	<b>2,173</b>	<b>2,135</b>

# Fiber Broadband subscriptions – raw data

## Fiber Broadband subscriptions – (residential)

	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q3 2023
Batelco	128,763	127,965	128,105	127,787	126,908
Zain	11,984	12,693	13,511	14,115	14,901
STC	13,098	13,428	14,078	14,022	13,763*
OLOs	5,354	5,354	5,354	5,354	5,354
<b>Total</b>	<b>159,199</b>	<b>159,440</b>	<b>161,048</b>	<b>161,278</b>	<b>160,926</b>

## Fiber Broadband subscriptions – (non-residential)

	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q3 2023
Batelco	1,367	1,269	1,320	1,336	1,341
Zain	1,050	1,242	1,328	1,445	1,596
STC	1,017	1,470	1,737	1,888	2,297*
OLOs	1,974	2,001	2,001	2,001	2,001
<b>Total</b>	<b>5,408</b>	<b>5,982</b>	<b>6,386</b>	<b>6,670</b>	<b>7,235</b>
<b>GRAND TOTAL</b>	<b>164,607</b>	<b>165,422</b>	<b>167,434</b>	<b>167,948</b>	<b>168,161</b>

\*STC figures are under review and are therefore subject to change.

# Total Mobile Broadband subscriptions\* – raw data

## Mobile Broadband subscriptions – (Prepaid)

	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q3 2023
Batelco	494,067	532,275**	556,874	595,732	609,640
Zain	405,792	404,159	373,068	368,482	349,554
STC	403,612	387,840	372,646	351,684	364,645

## Mobile Broadband subscriptions – (Postpaid)

Batelco	360,841	363,828	367,401	371,006	358,302
Zain	182,193	186,901	188,251	190,491	187,256
STC	445,818	449,422	447,242	377,195	389,355
<b>Total**</b>	<b>2,289,066</b>	<b>2,319,717</b>	<b>2,304,132</b>	<b>2,255,279</b>	<b>2,258,752</b>

\* Excluding M2M

Some operators' data have been restated for 2022-2023

\*\* 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).