

Quarterly Market Indicators Report

Q4 2023

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Main Telecom Market Indicators (Q4 2022- Q4 2023)

	Q4 2022	Q1 2023	Q2 2023	Q3 2023	Q4 2023
 Mobile subscribers	2,141,263	2,152,591	2,299,208	2,328,750	2,415,715
 Mobile penetration	137%	136%	146%	148%	153%
 Mobile prepaid subscriptions	1,442,499	1,447,023	1,505,994	1,512,500	1,561,966
 Mobile postpaid subscriptions	698,239	705,172	792,832	816,250	853,748
 Average outgoing minutes from mobile (Domestic & Inter.)	171	160	152	136	140
 Fixed telephony subscriptions	217,077	216,678	215,233	214,355	211,474
 Fixed telephony penetration (Excluding ISDN)	13.8%	13.7%	13.6%	13.6%	13.4%
 Domestic monthly average minutes per line*	62	59	56	55	56
 International outgoing minutes (Mobile)	240,338,321	217,124,126	215,140,781	191,292,046	185,562,210
 International outgoing minutes (Fixed telephony)	2,162,818	2,321,273	1,741,692	1,556,065	1,427,326
 Mobile broadband subscriptions	2,319,717	2,304,132	2,332,985	2,314,646	2,317,171
 Mobile broadband penetration rate	147.1%	146.1%	143%	143.2%	147%
 Fiber broadband subscriptions	165,422	167,434	167,948	168,560	169,350
 Fiber broadband penetration per household**	64%	65%	65%	65%	66%
 Total data usage (Petabyte)	401	433	444	476	476
 Average total data usage per month per subscription	57	62	66	64	64

*An operator restated for the year 2022-2023.

**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 Q4 2023



Mobile subscribers: **2,415,715**

Penetration: **153%**

Average Int. & Domestic minutes per month per mobile subscription: **140**

Average data usage per mobile broadband subscription*: **23.7**

Fixed telephony subscriptions (Exclud. ISDN): **211,474**

Penetration: **13.4%**

Fixed Wired Telephony subscriptions **95%**

Fixed Wireless Telephony subscriptions: **5%**

Mobile Broadband subscriptions: **2,317,171**

Mobile Broadband penetration rate: **147%**

Fiber Broadband subscriptions: **169,350**

Fiber Broadband penetration rate per household: **66%****



Mobile Prepaid subscriptions: **1,561,966**

Mobile postpaid subscriptions: **853,748**

% 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): **185,562,210**

International Outgoing Minutes (Fixed telephony): **1,427,326**



Total Data Usage: **476 Petabyte**

Fiber Broadband Traffic: **264 Petabyte**

Avg. Traffic per broadband subscription per month: **64 GB**

Avg. Fiber Broadband Traffic per month: **496 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 2023)

2,415,715 Subscriptions

153% Penetration rate

Q4 2022

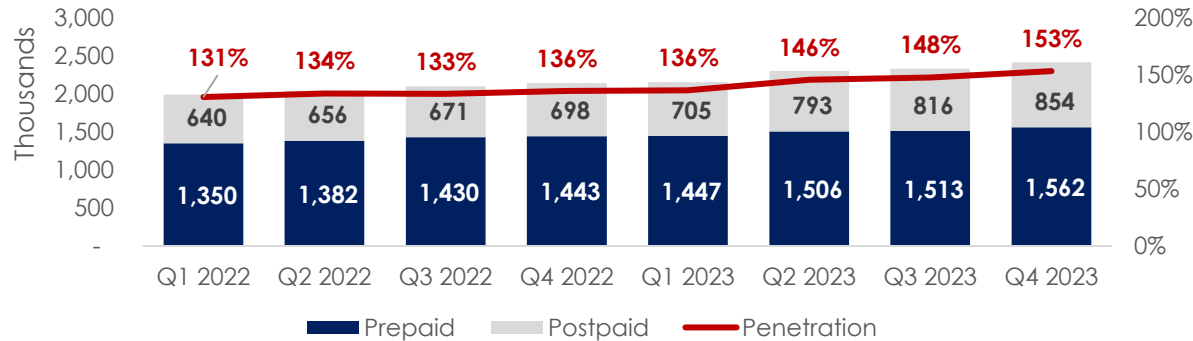
2,141,263

Q4 2023

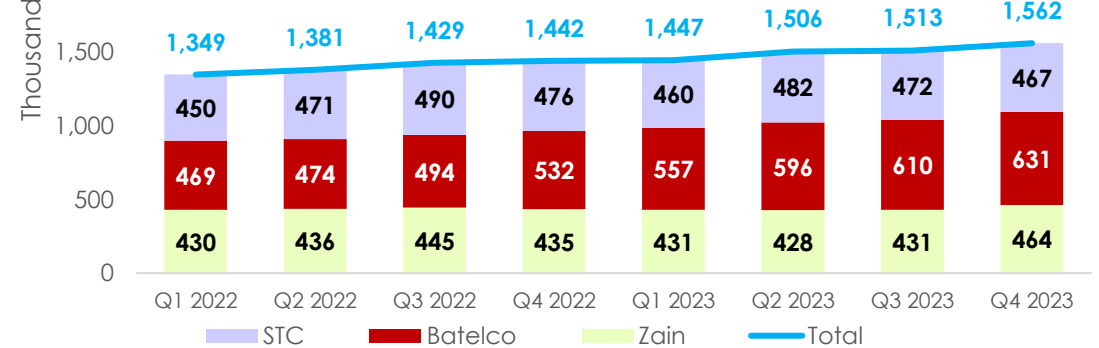
2,415,715

13%

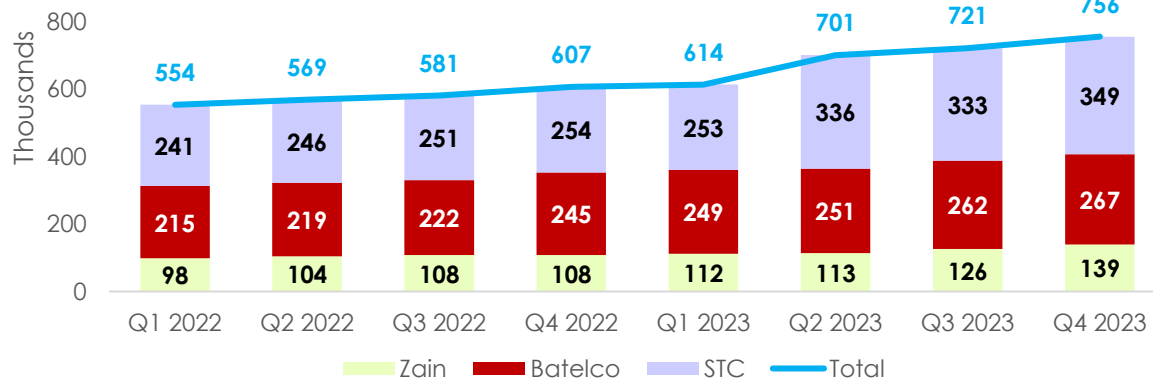
Number of Mobile Subscriptions & penetration



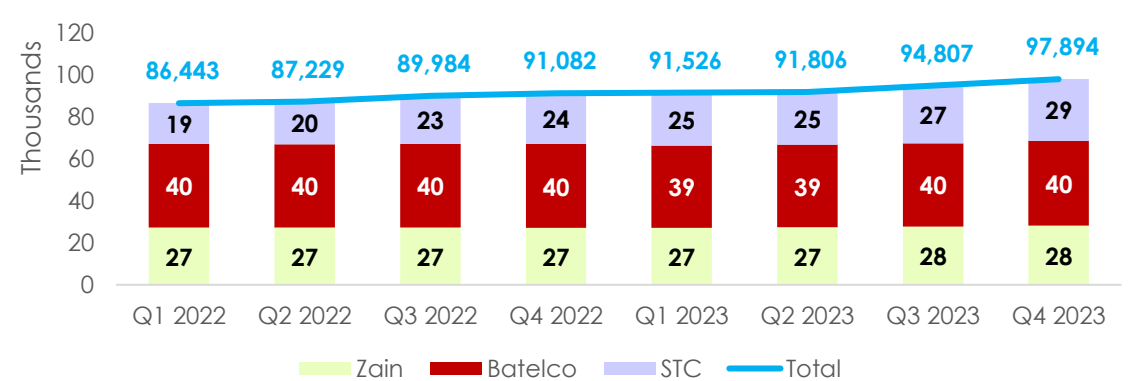
Prepaid subscribers - Residential**



Postpaid subscribers - Residential



Postpaid subscribers - Non Residential



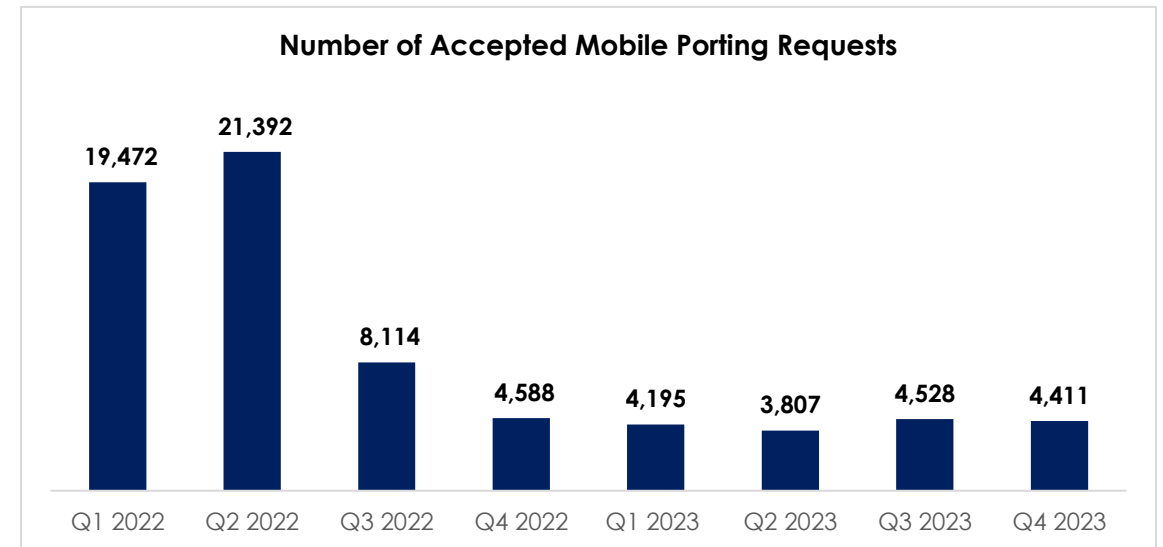
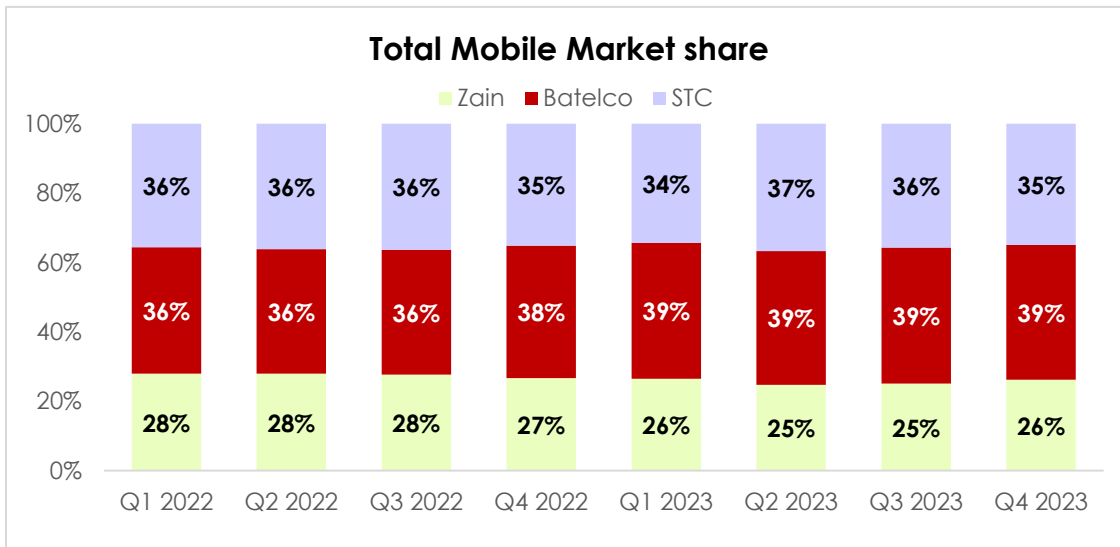
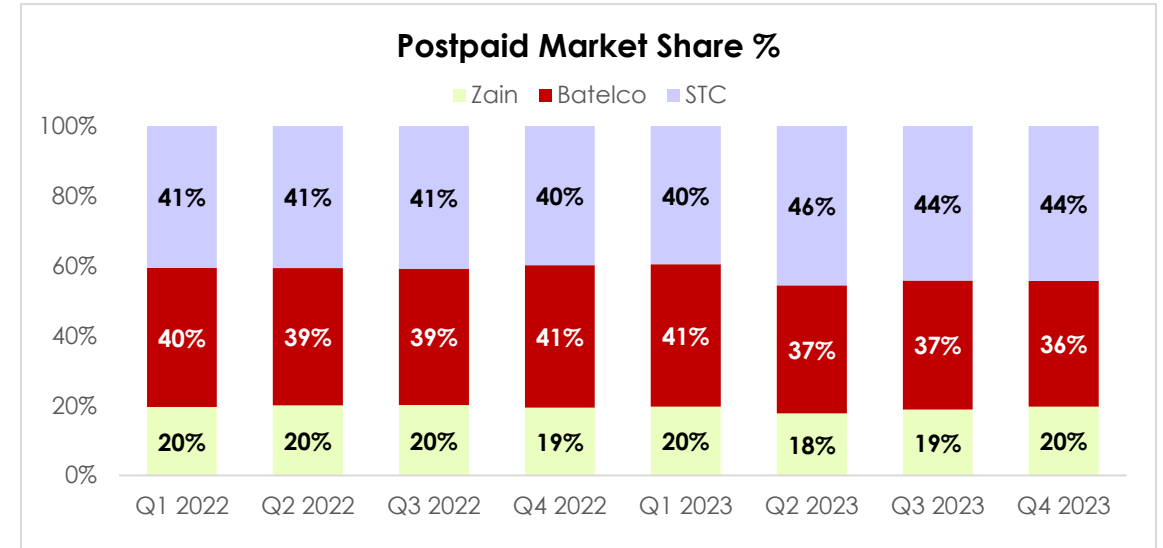
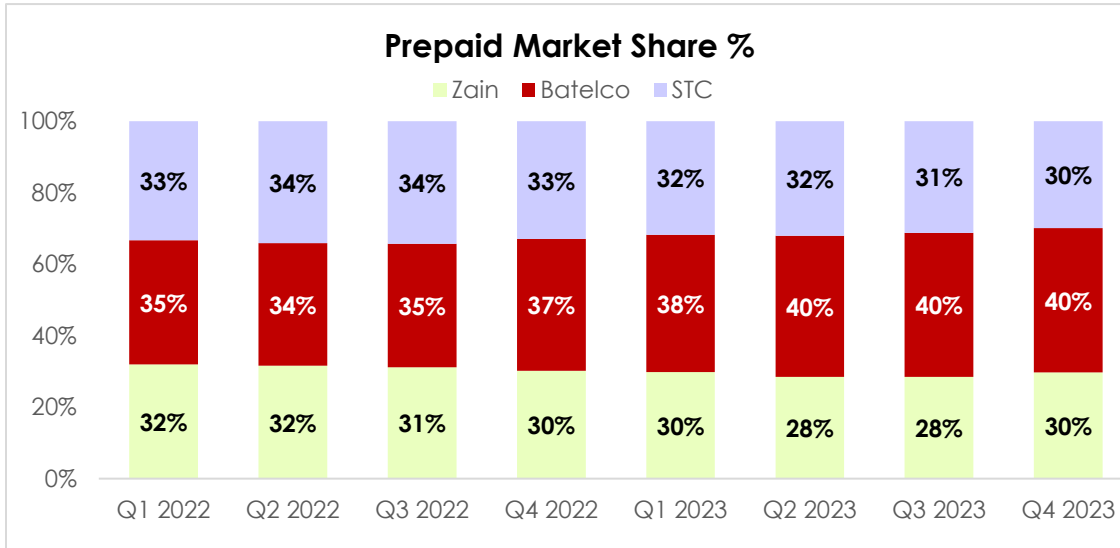
Population***	2021	2022	2023	2024
By IGA	1,504,365	1,565,000	1,577,059	1,577,059

* 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=q8FmFJgiscL2fwIzON1%2BDIHiz%2BofVmjO4F61CX7bmSQ%3D>

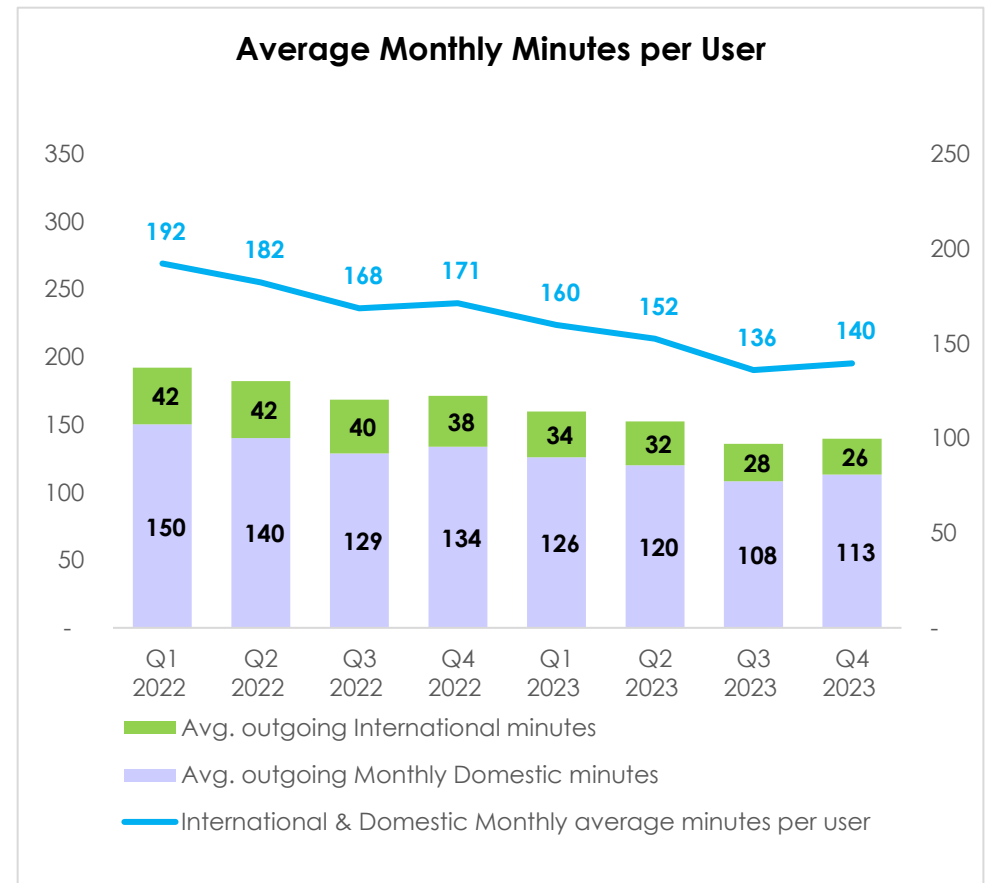
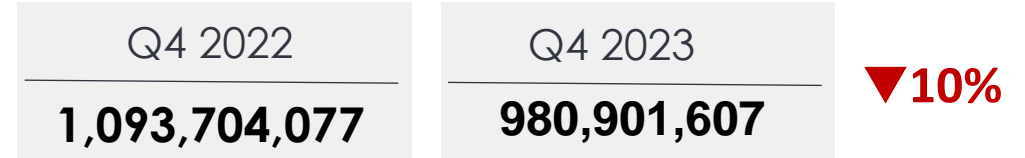
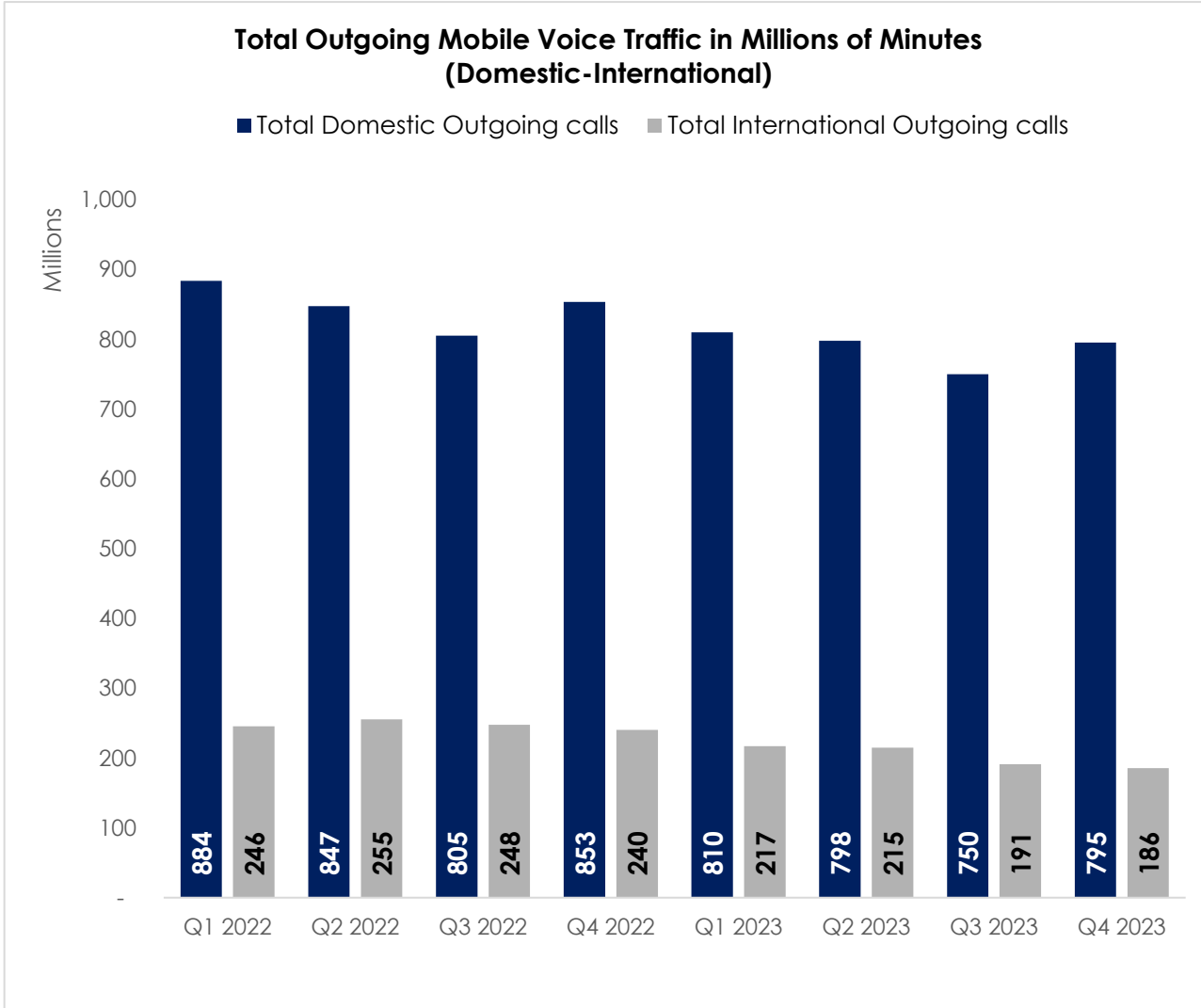
Mobile services: Subscriptions (2/2)



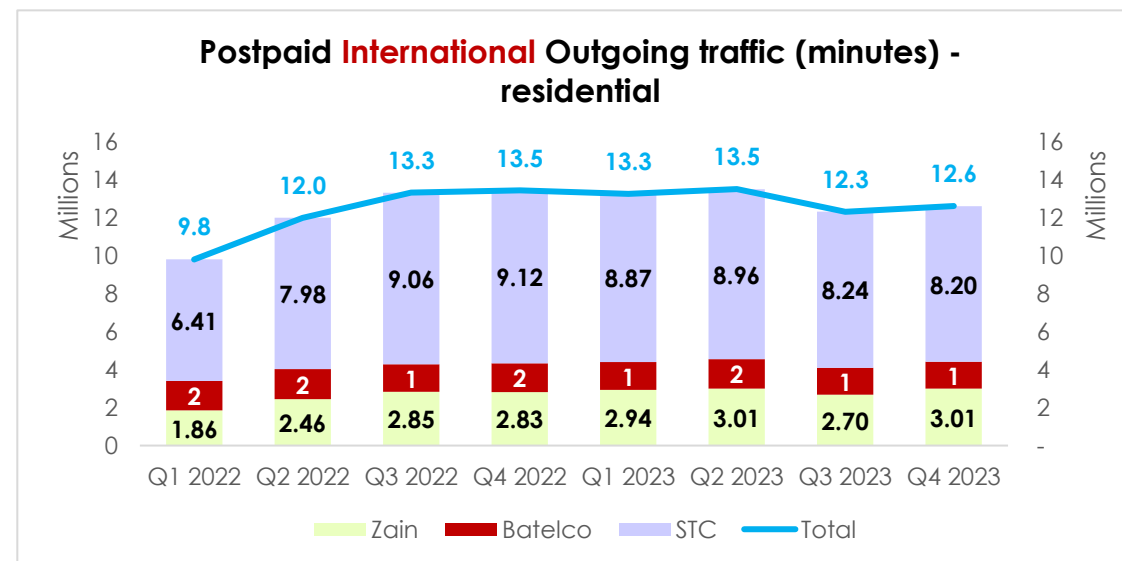
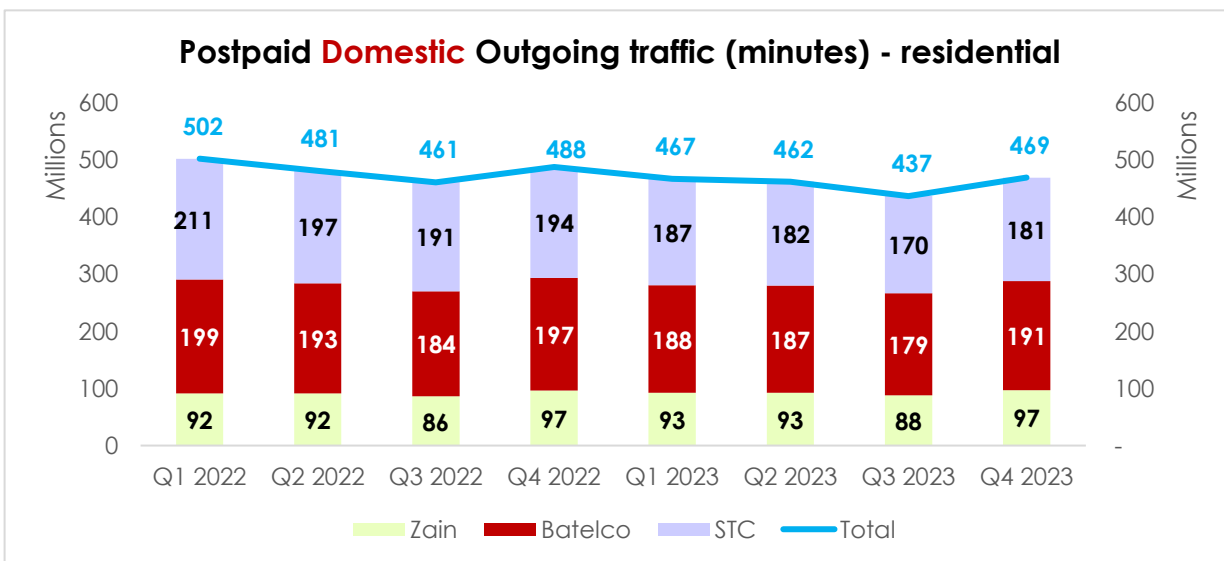
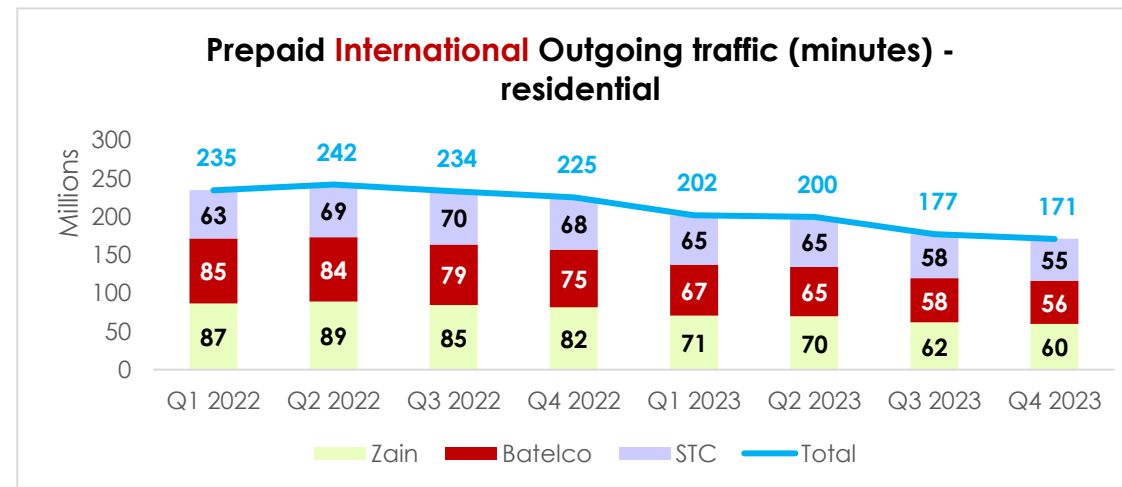
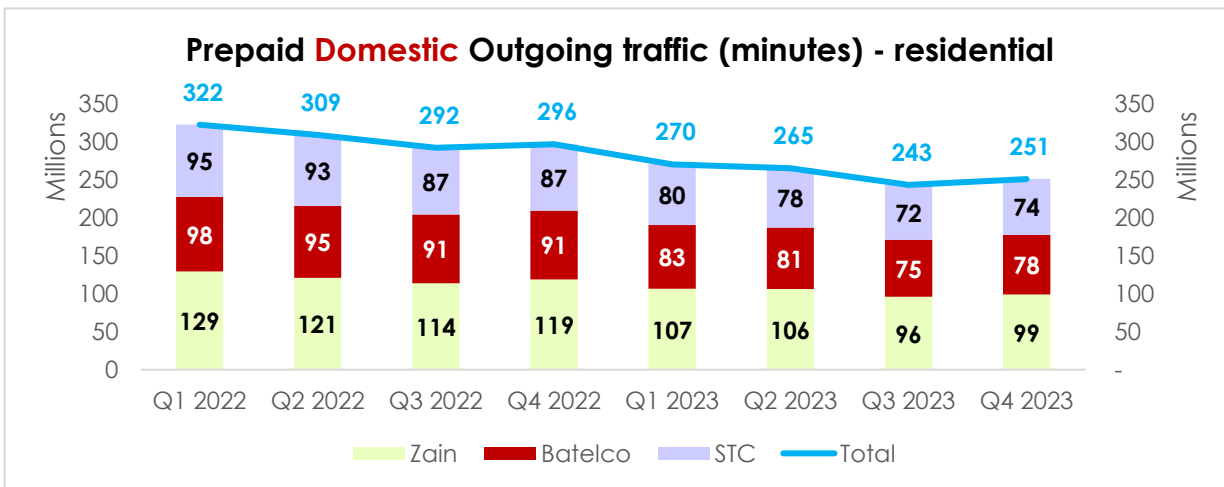
Mobile services: Traffic* (Minutes) (1/2)



Total Outgoing Traffic in Minutes (Domestic + International)*



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

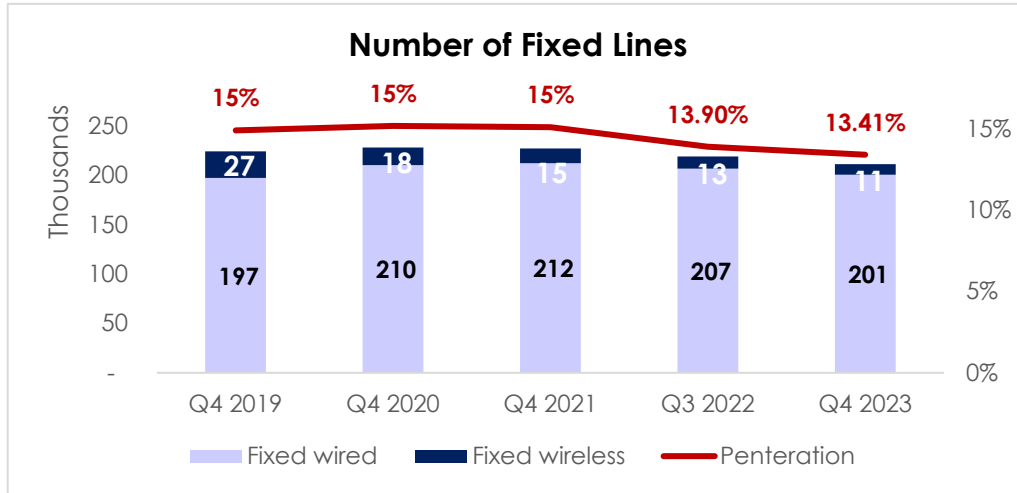


* Historical data for Non-residential (Domestic & Intl.) Traffic is currently unavailable.

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

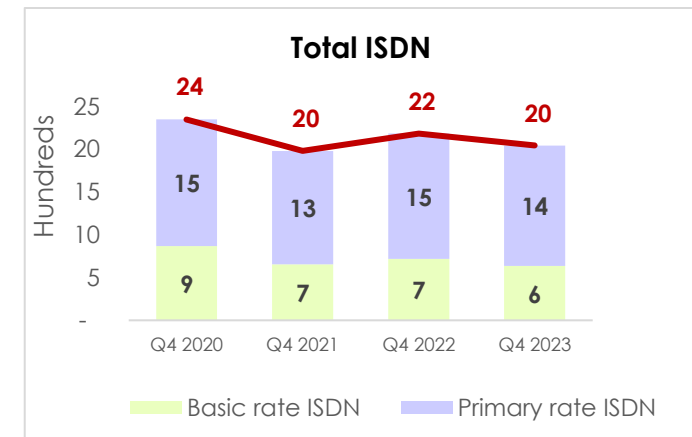
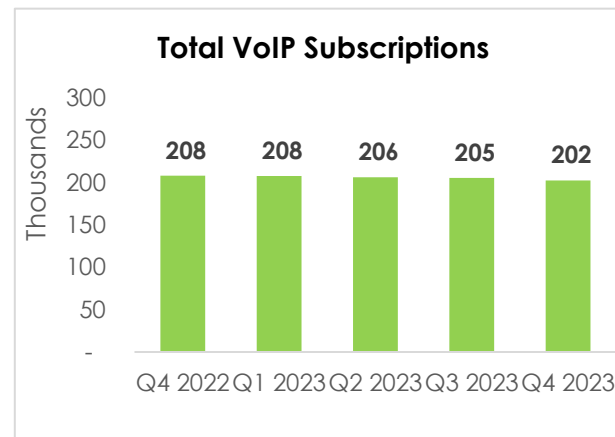
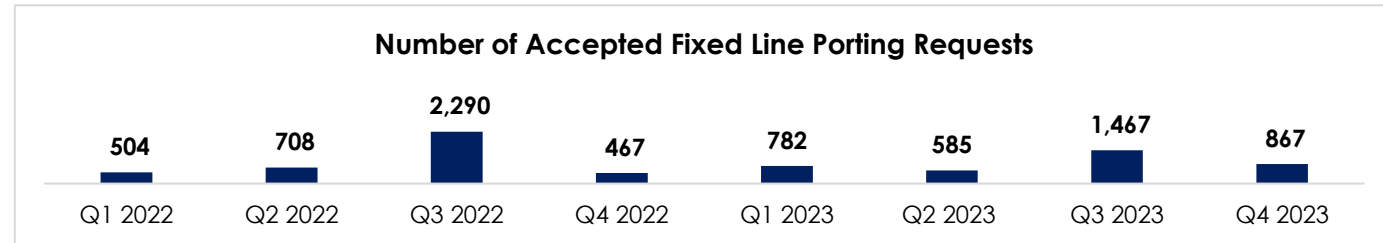
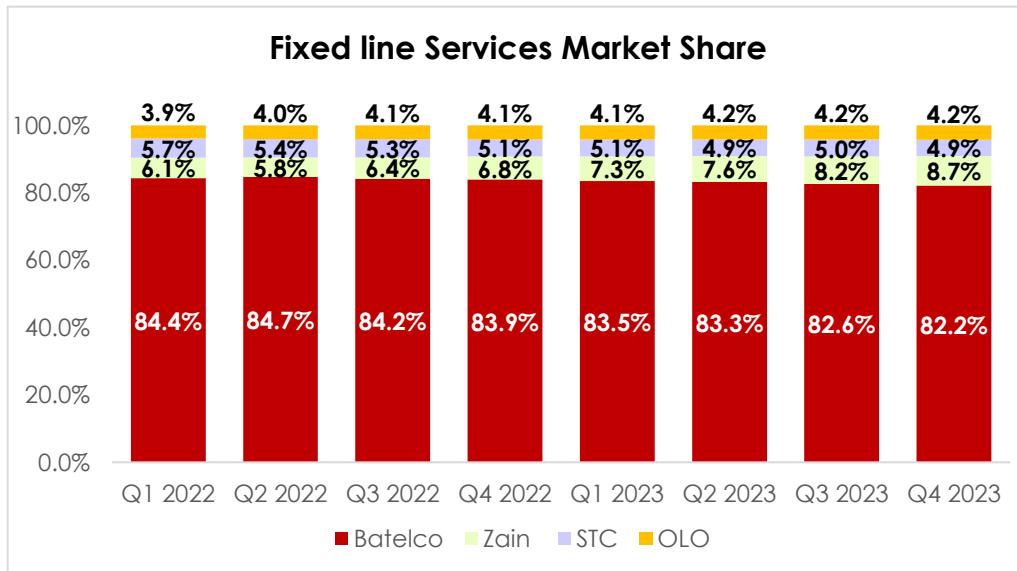


No. of fixed telephony subscriptions
(Excluding ISDN)



End of Q4 2022	End of Q4 2023
217,077	211,474
13.7% Penetration rate	13.4% Penetration rate

	2019	2020	2021	2022	Q4 2023
Q4 2023	224,962	228,121	227,133	217,077	211,474
% of Fixed Wired	88%	92%	93%	95%	95%
% of Fixed Wireless	12%	8%	7%	5%	5%



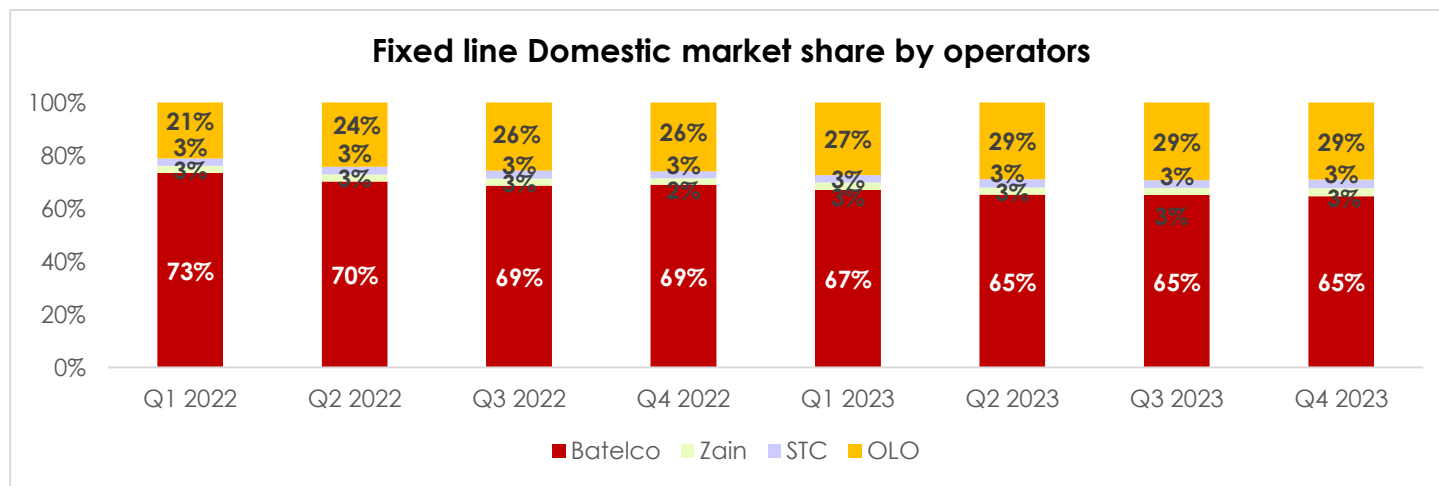
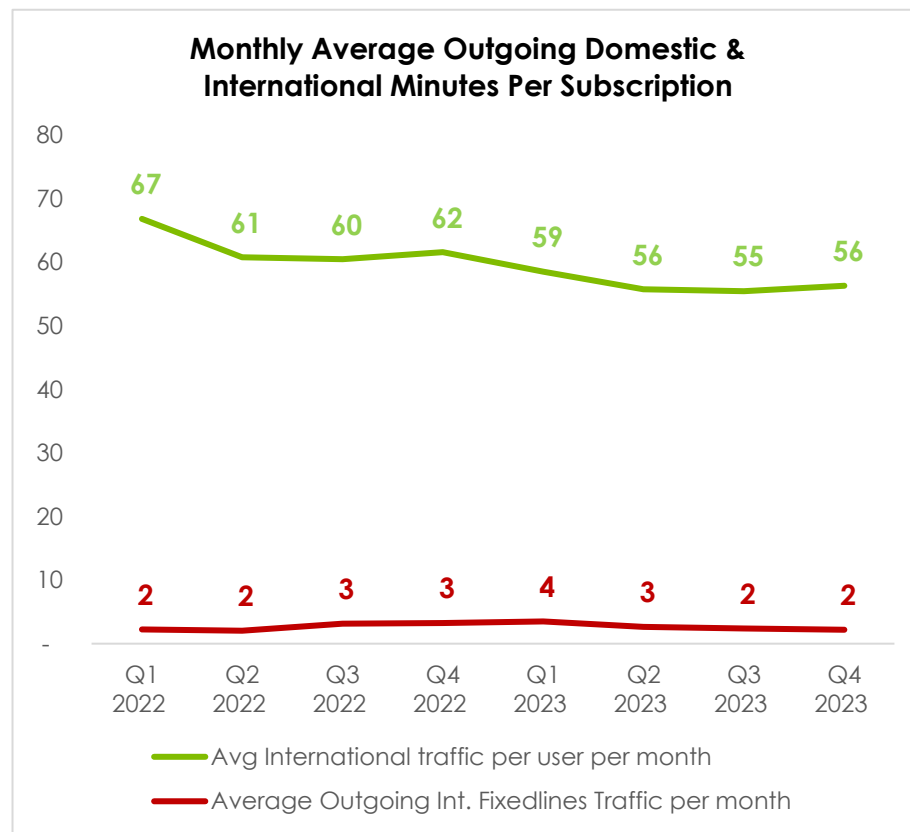
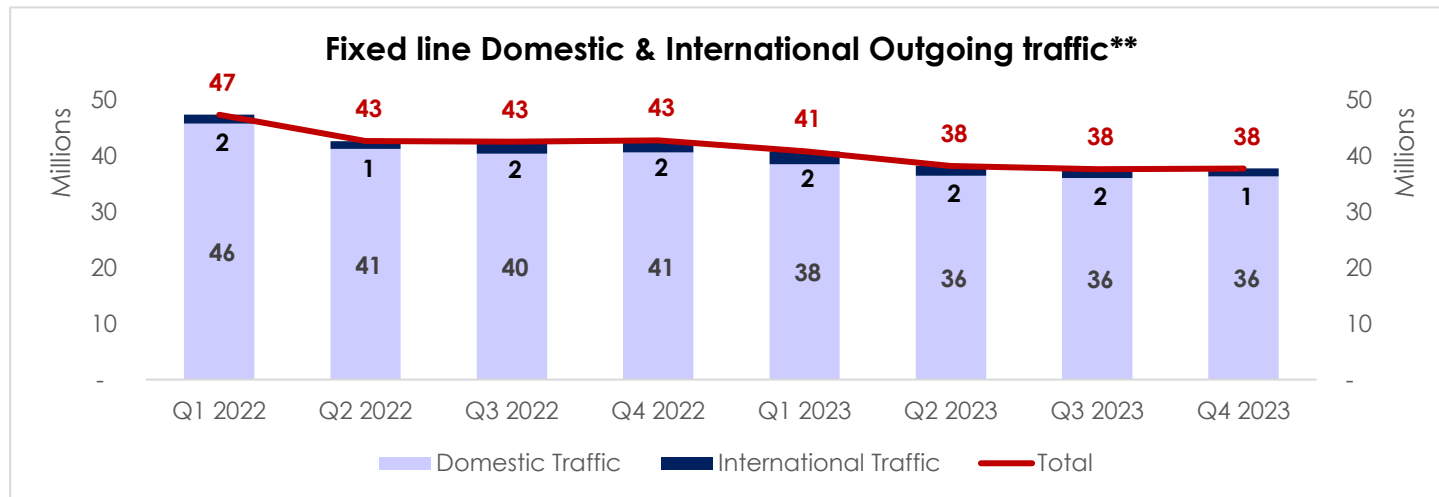
* Includes VoIP as of 2021 but excludes ISDN.

** 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**



* Includes VoIP and ISDN traffic.

Broadband services: Subscriptions* (1/2)



No. of broadband subscriptions (End of Q4 2023)

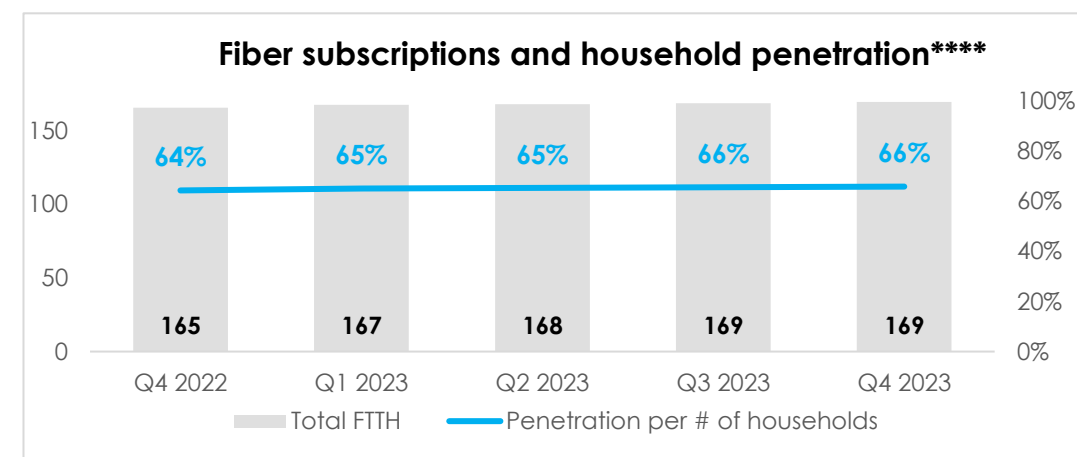
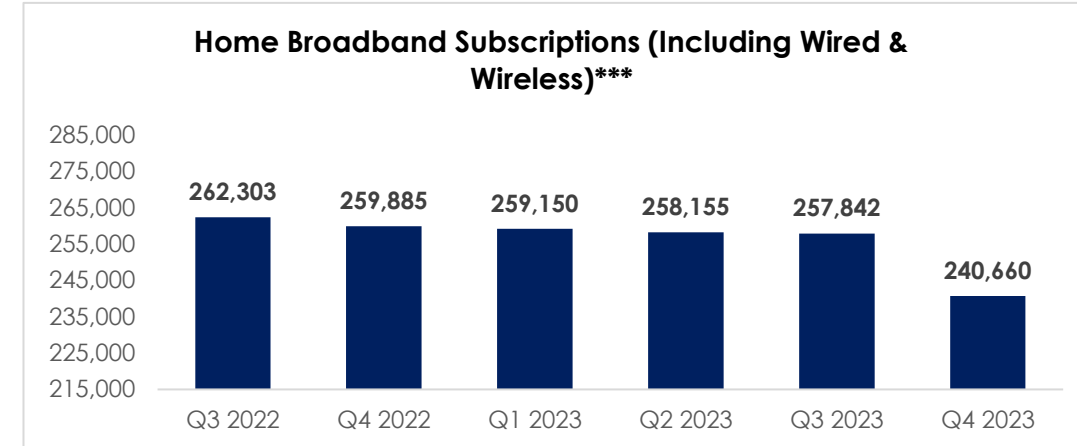
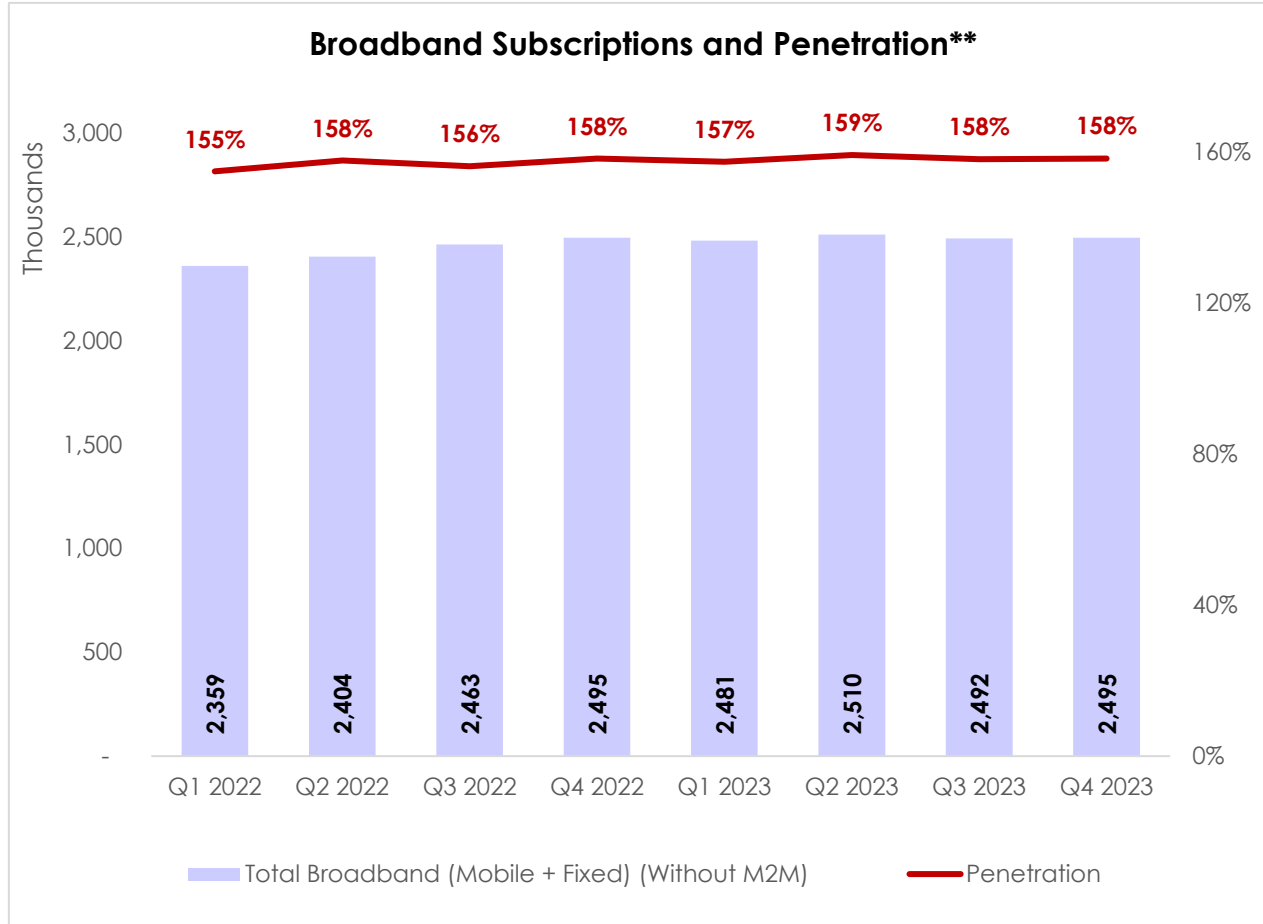
2,494,898

154% Penetration rate

Q4 2022
2,494,706

Q4 2023
2,494,898

<1%



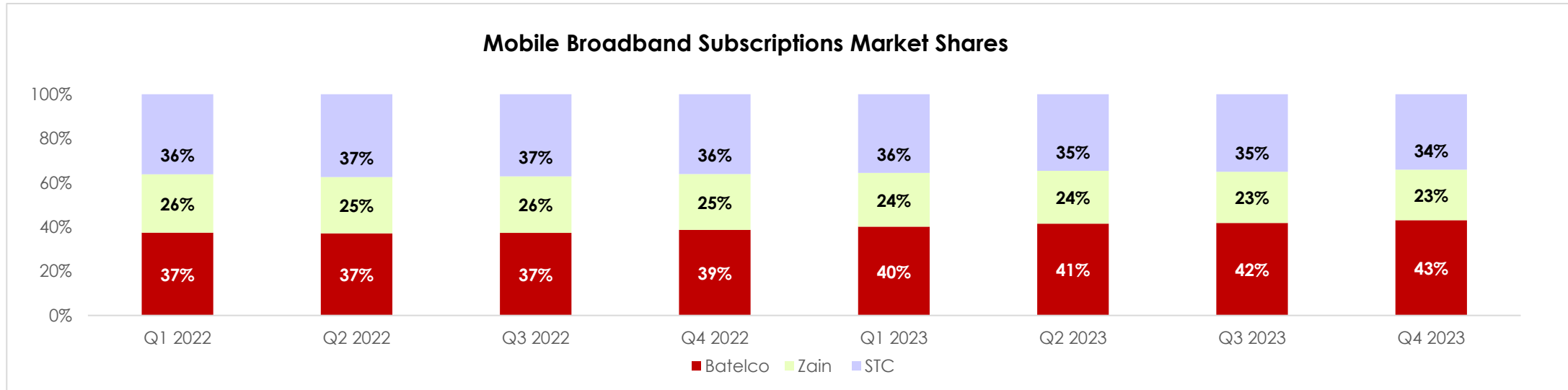
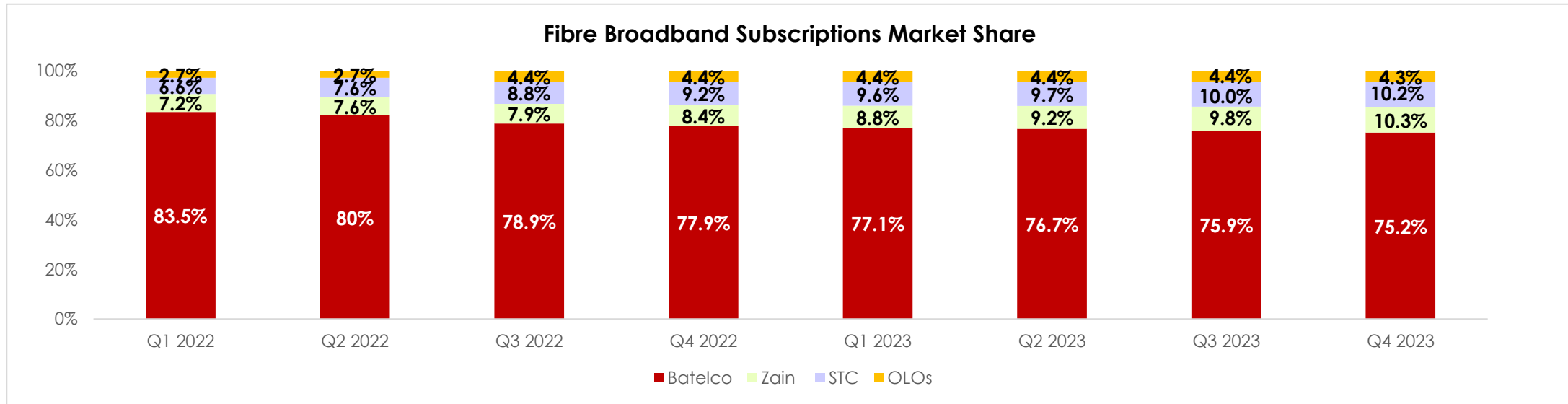
* Doesn't include M2M.

** Mobile broadband data is currently under review.

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

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

Broadband services: Subscriptions* (2/2)



Broadband services: Data Traffic 1 of 2



Total data traffic in Gigabyte

Q4 2022

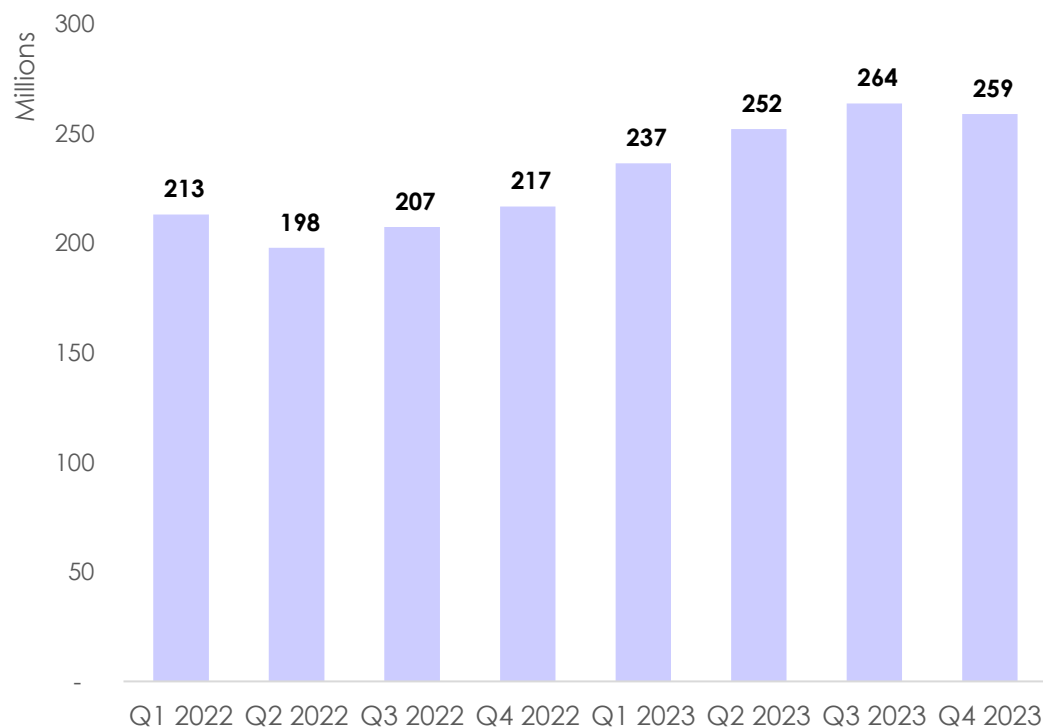
401,368,150

Q4 2023

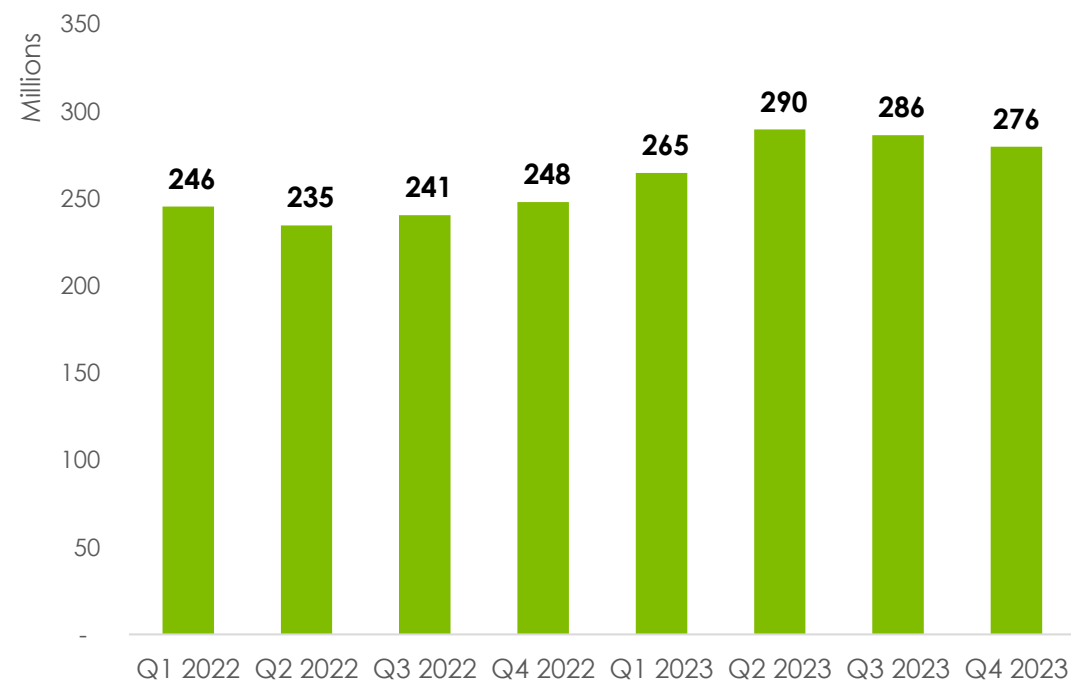
476,095,374

▲ 19%

Fibre Broadband Traffic



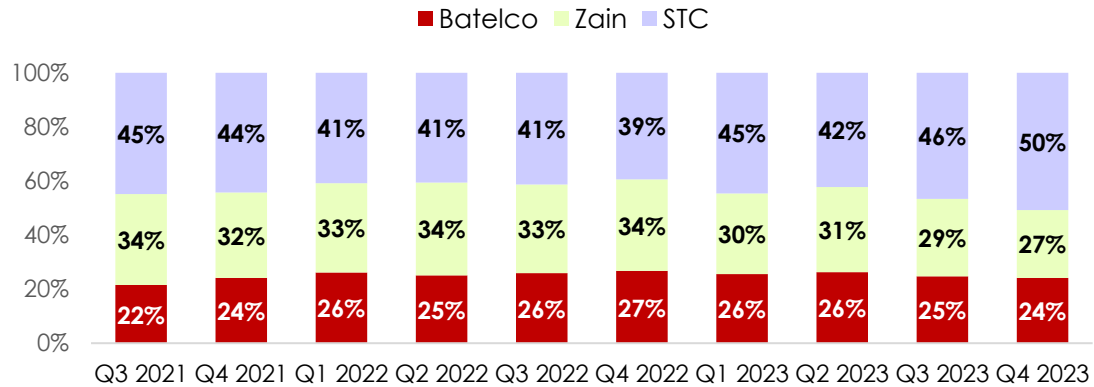
Home Broadband Traffic* (Including Wired & Wireless)



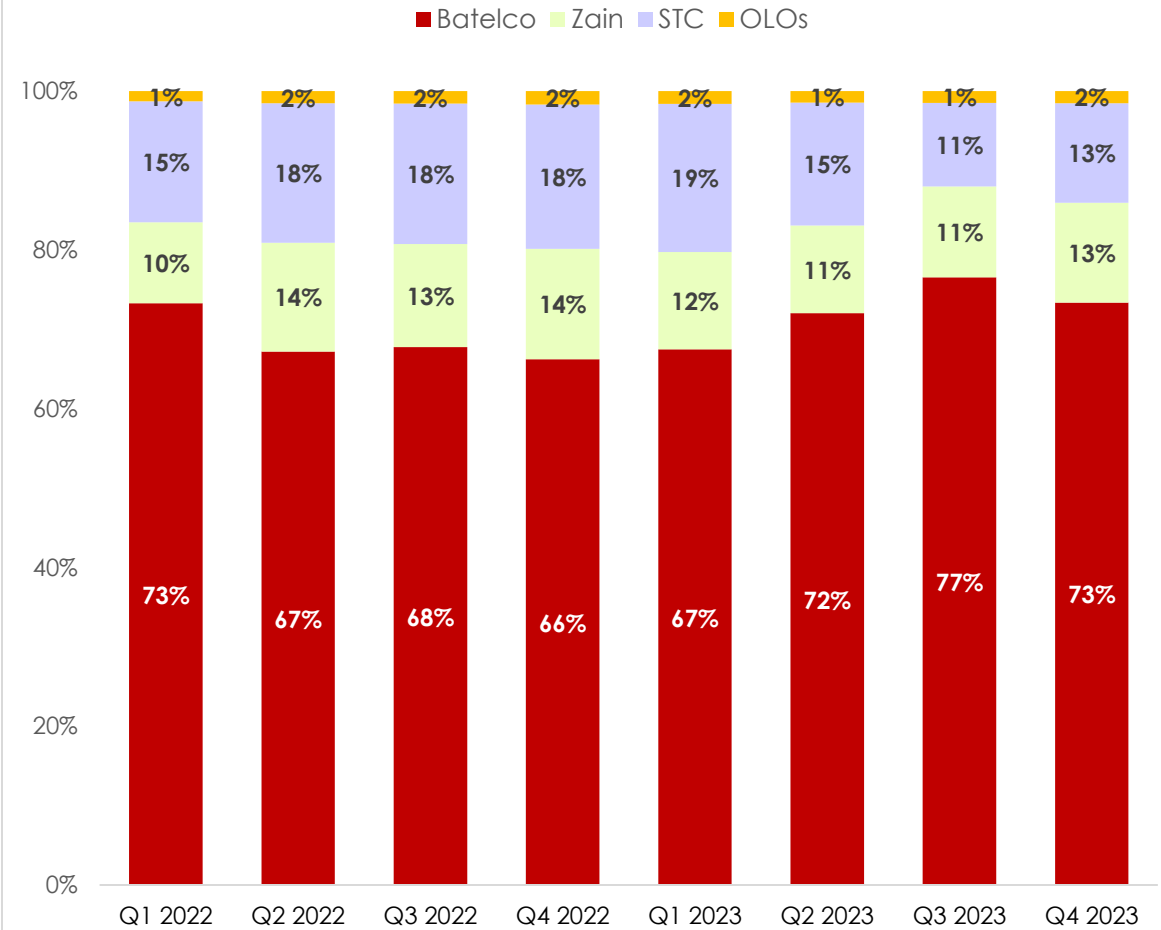
* Includes residential Fiber, Fixed Terrestrial and Mobile Home BB.

Broadband services: Data Traffic 2 of 2

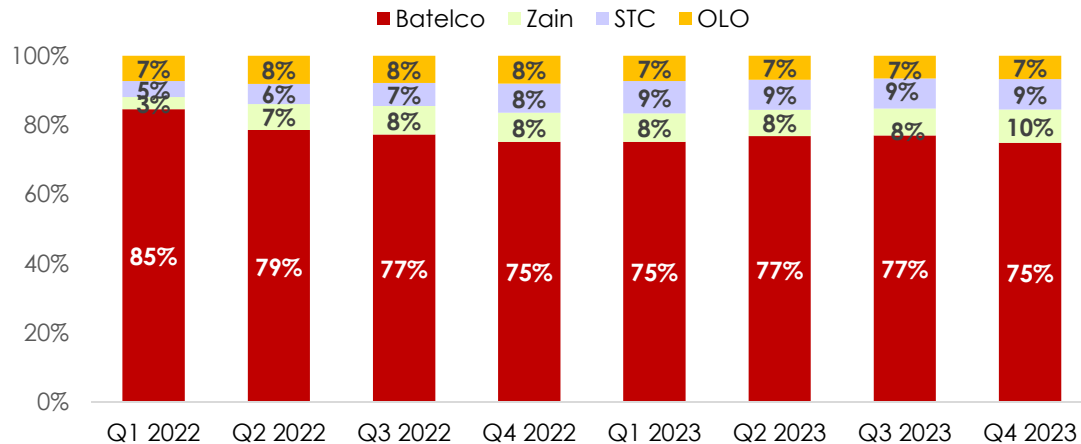
Mobile Broadband Traffic Market Share



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

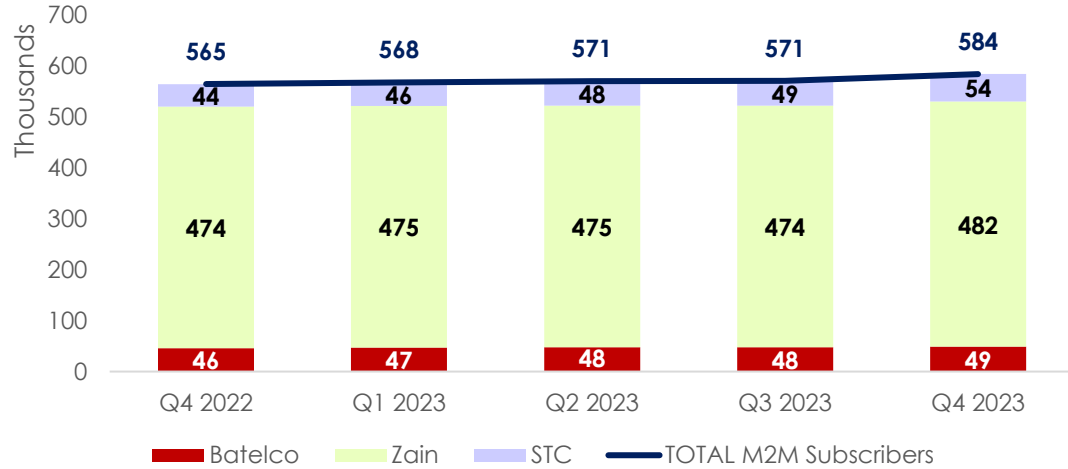


Fiber Broadband Traffic Market Share

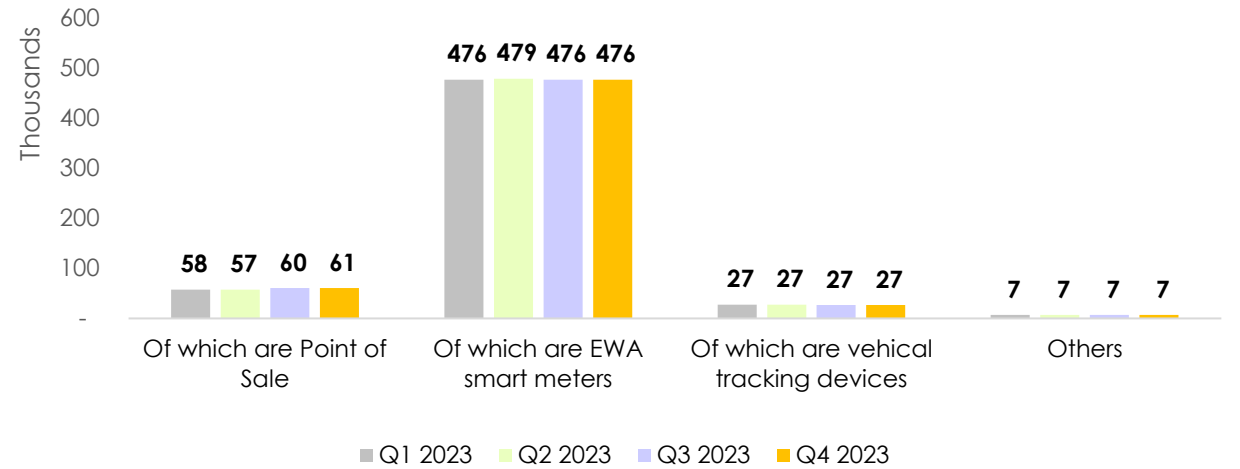


M2M Subscribers & Traffic

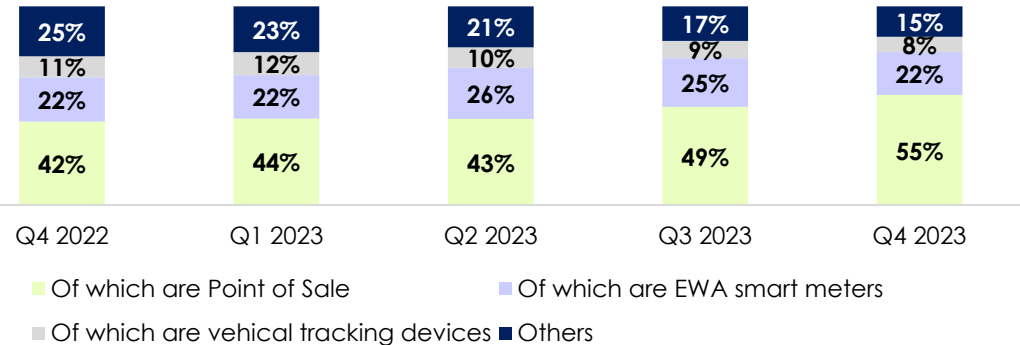
M2M Subscribers (Thousands)



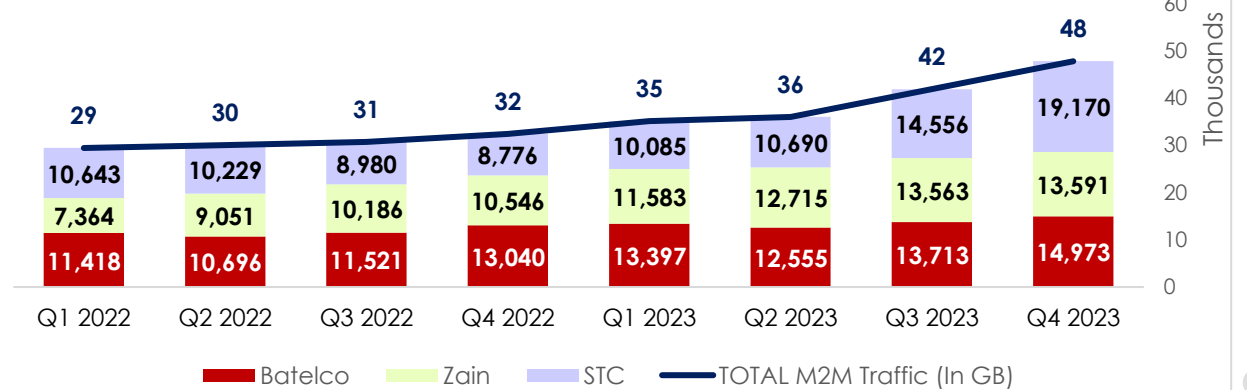
M2M Subscribers by type



M2M Traffic by Type (GB)



M2M 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 <u>residential</u> subscribers						Prepaid <u>non-residential</u> subscribers*				
	Q4 2022	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q4 2022	Q1 2023	Q2 2023	Q3 2023	Q4 2023
Batelco	532,275	556,874	595,732	609,640	630,755	N/A	N/A	N/A	N/A	N/A
Zain	434,705	430,642	427,940	430,924	463,812	525	396	382	N/A	N/A
STC	475,519	459,507	482,322	471,936	467,399	N/A	N/A	N/A	N/A	1
Total	1,442,499	1,447,023	1,505,994	1,512,500	1,561,966	525	396	382	0	1
Postpaid <u>residential</u> subscribers						Postpaid <u>non-residential</u> subscribers				
	Q4 2022	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q4 2022	Q1 2023	Q2 2023	Q3 2023	Q4 2023
Batelco	244,879	248,746	251,457	262,205	267,218	39,851	39,100	39,328	39,561	40,252
Zain	108,322	111,551	113,295	126,083	139,471	27,109	27,145	27,386	27,784	28,240
STC	253,956	253,349	336,274	333,155	349,165	24,122	25,281	25,092	27,462	29,402
Total	607,157	613,646	701,026	721,443	755,854	91,082	91,526	91,806	94,807	97,894

*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	Q4 2023
Batelco	129,651	128,325	127,599	126,485	125,047	122,374
Zain	12,690	13,381	14,189	14,771	15,673	16,467
STC	8,515	7,991	7,972	7,768	7,850	7,298
Fixed line subscriptions – PSTN & VoIP (non-residential)						
Batelco	54,968	53,891	53,386	52,710	52,065	51,369
Zain	1,279	1,459	1,555	1,673	1,825	1,944
STC	3,165	3,044	2,991	2,840	2,909	3,036
OLOs*	8,984	8,986	8,986	8,986	8,986	8,986
Total**	219,252	217,077	216,687	215,158	214,355	211,474

* Includes residential & non-residential

** Excluding ISDN.

	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q3 2023	Q4 2023
Basic-rate ISDN	740	718	715	705	680	636
Primary-rate ISDN	1,470	1,467	1,459	1,468	1,455	1,408
Total	2,210	2,185	2,174	2,173	2,135	2,044

Fiber Broadband subscriptions – raw data

Fiber Broadband subscriptions – (residential)						
	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q3 2023	Q4 2023
Batelco	128,763	127,965	128,105	127,787	126,908	126,394
Zain	11,984	12,693	13,511	14,115	14,901	15,711
STC	13,098	13,428	14,078	14,022	14,162	14,466*
OLOs	5,354	5,354	5,354	5,354	5,354	5,354
Total	159,199	159,440	161,048	161,278	161,205	161,925
Fiber Broadband subscriptions – (non-residential)						
	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q3 2023	Q4 2023
Batelco	1,367	1,269	1,320	1,336	1,341	1,214
Zain	1,050	1,242	1,328	1,445	1,596	1,723
STC	1,017	1,470	1,737	1,888	2,297	2,487
OLOs	1,974	2,001	2,001	2,001	2,001	2,001
Total	5,408	5,982	6,386	6,670	7,235	7,424
GRAND TOTAL	164,607	165,422	167,434	167,948	168,560	169,350

*STC figures amended for Q3-Q4 .

Total Mobile Broadband subscriptions* – raw data

Mobile Broadband subscriptions – (Prepaid)

	Q4 2022	Q1 2023	Q2 2023	Q3 2023	Q4 2023
Batelco	532,275**	556,874	595,732	609,640	630,755
Zain	404,159	373,068	368,482	349,554	344,437
STC	387,840	372,646	351,684	364,645	368,735

Mobile Broadband subscriptions – (Postpaid)

Batelco	363,828	367,401	371,006	358,302	366,998
Zain	186,901	188,251	190,491	187,256	185,787
STC	449,422	447,242	434,394	437,174	420,459***
Total**	2,319,717	2,304,132	2,332,985	2,314,646	2,317,171

* 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.