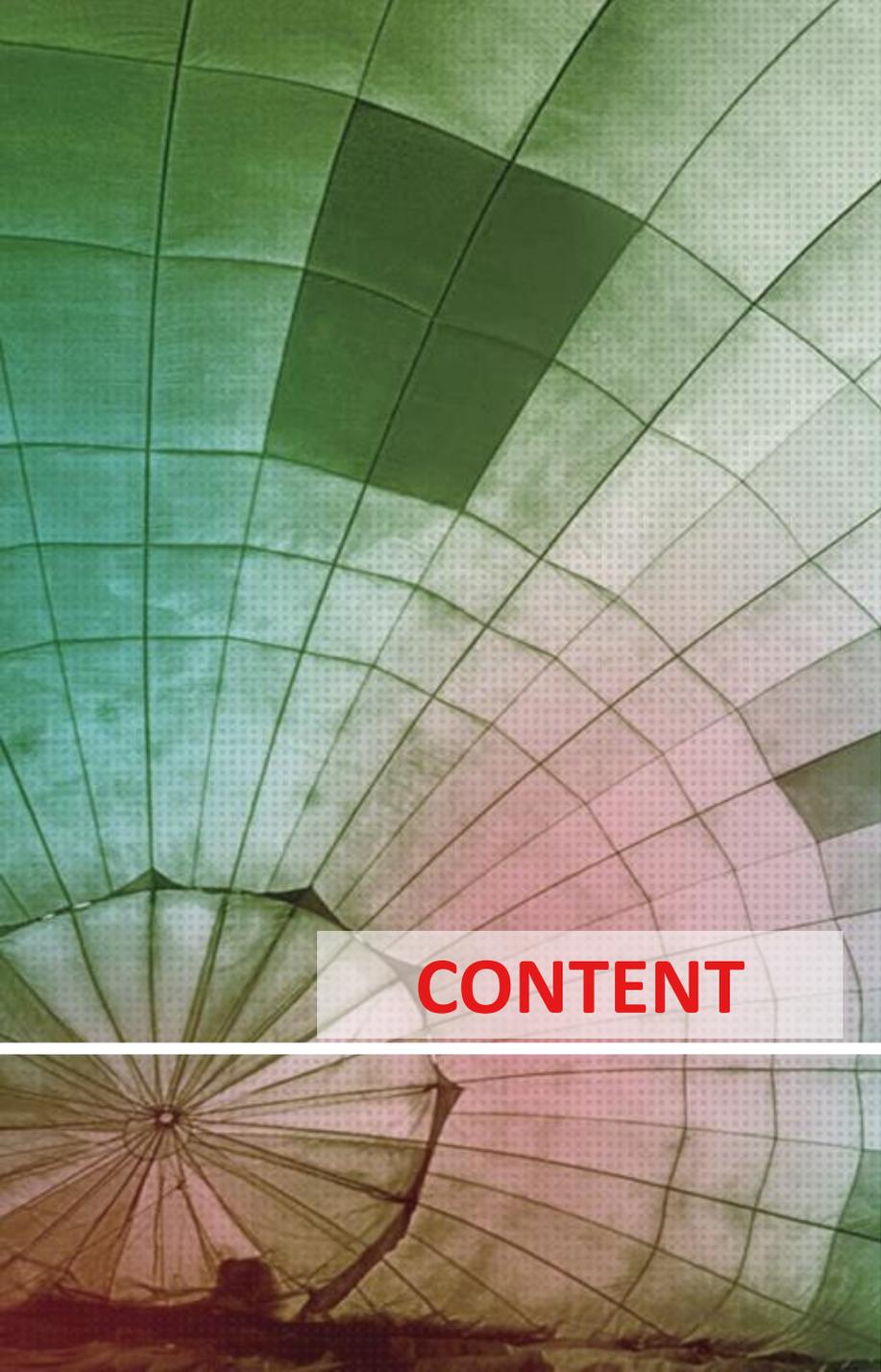




هيئة تنظيم الاتصالات
Telecommunications Regulatory Authority
مملكة البحرين - Kingdom of Bahrain

Quarterly Market Indicators

Q4 2016



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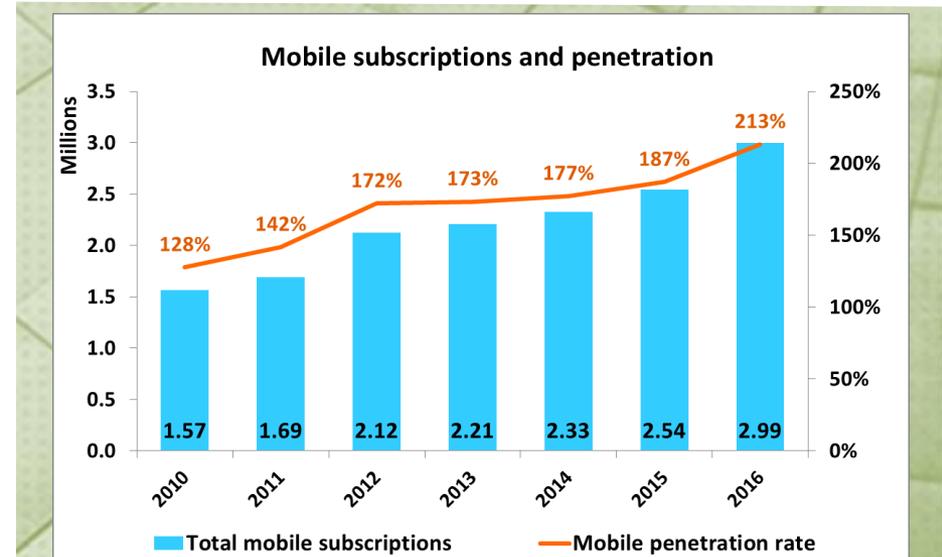
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Mobile services

- Mobile service closed Q4 2016 with 2.99million subscriptions, the number of mobile subscriptions grew by 18% comparing to end of Q4 2015.
- Mobile penetration at the end of 2016 is 213%.
- At the end of 2016, prepaid mobile subscriptions represented 81% of total mobile subscriptions.

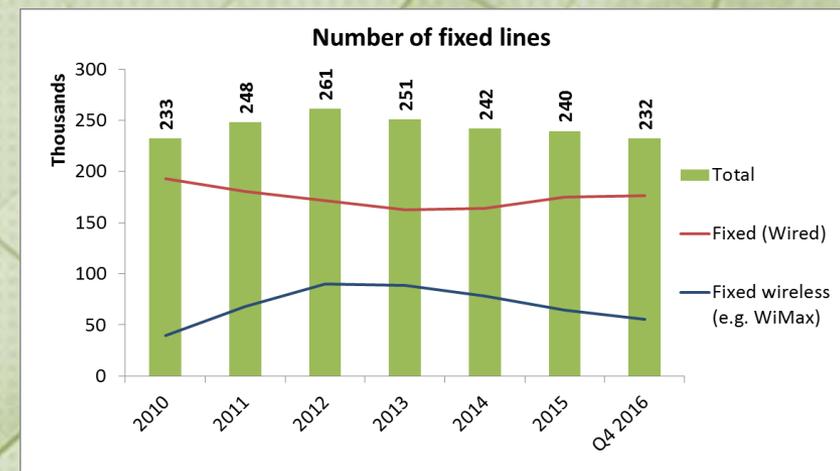
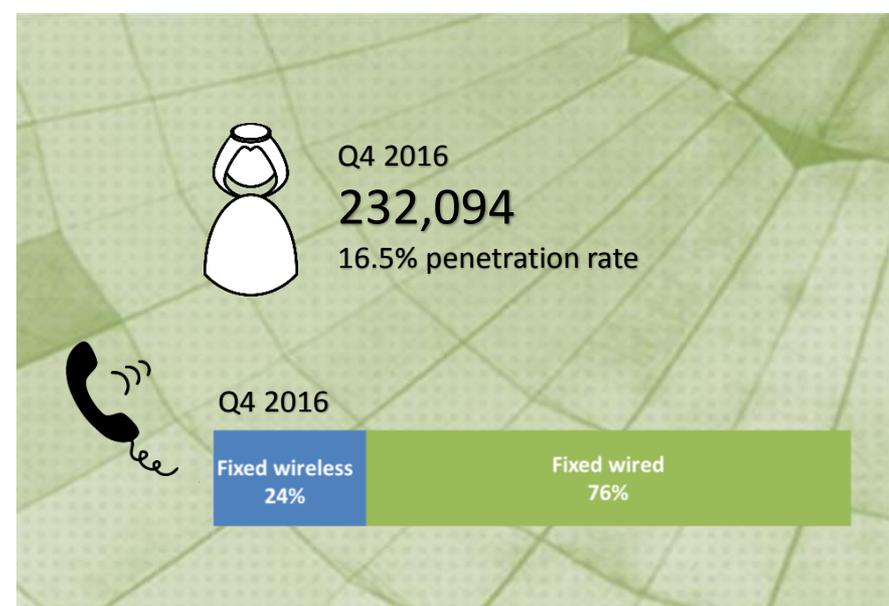


	2010	2011	2012	2013	2014	2015	2016
Total	1,289,274	1,379,820	1,720,958	1,777,864	1,821,364	1,975,192	2,994,865
% of Prepaid	82%	81%	81%	80%	78%	78%	81%
% of Postpaid	18%	19%	19%	20%	22%	22%	19%

*Based on 2016 mid-year population estimated by CIO 1,404,900
Source: TRA analysis based on operators data.

Fixed telephony services

- Continuing with the tendency of the last years (as it decreased by (3%) between 2014-2015), in Q4 2016 the number of fixed telephony subscriptions decreased by (3%).
- At the end of Q3 2016, fixed wire telephony represented 76% of total fixed lines, compared to 73% at the end of 2015.
- While the fixed wireless shows a significant decrease (64,542 lines in 2015 to 55,542 lines in 2016, decrease of (14%)), the number of fixed wired telephony lines increases by 1,573 during the same period.



	2010	2011	2012	2013	2014	2015	2016
Fixed wired	192,932	180,514	171,238	162,732	164,085	174,979	176,552
Fixed wireless	39,626	67,966	90,122	88,342	78,005	64,542	55,542
Total	232,558	248,480	261,360	251,074	242,090	239,521	232,094

*Based on 2016 mid-year population estimated by CIO 1,404,900
Source: TRA analysis based on operators data.

Broadband services

- At the end of Q4 2016, there were about 2.4 million broadband subscriptions, a 22% increase compared to Q4 2015.
- Broadband penetration reached 172% at the end of Q4 2016.
- The main drive for the growth of broadband subscriptions is the mobile broadband subscriptions.
- Mobile broadband subscriptions represented 93% of total broadband subscriptions at the end of Q4 2016.
- Add-on broadband to voice and pay-per-use mobile broadband represent 85% of mobile broadband subscriptions at the end of Q4 2016.

*Based on 2016 mid-year population estimated by CIO 1,404,900
Source: TRA analysis based on operators data.



Q4 2016

2.4 million

172% penetration rate

Mobile Broadband

Q4 2016

Standalone 15%



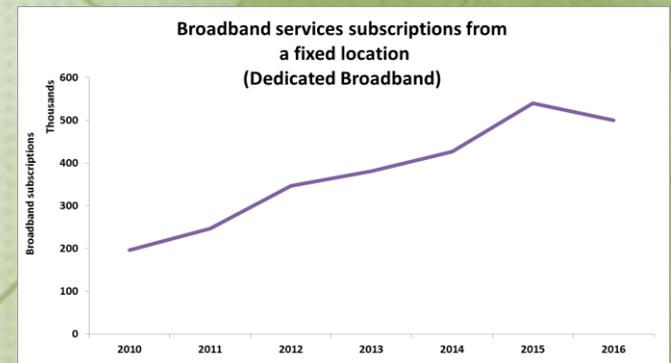
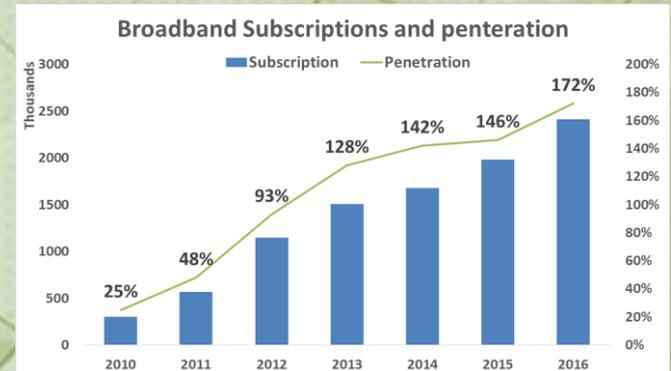
Pay-per-use 26%

Proportion of broadband subscriptions by access type

Q4 2016

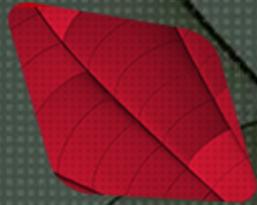


Fixed broadband (wired+wireless) 7%



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. 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