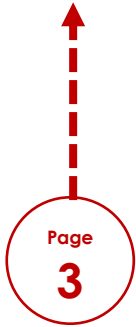


# Quarterly Market Indicators

Q1 2021

# Content

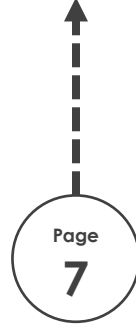
Disclaimer



Mobile services



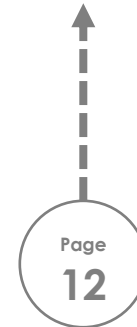
Fixed line  
telephony services



Broadband services



M2M Subscribers  
& Traffic



Definitions



## Disclaimer

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# Main Market Indicators for Q1 2021



Mobile subscribers:  
**1,782,117**

Penetration:  
**121%**

Average Int. & Domestic minutes per **month** per mobile subscription:  
**232**

Average data usage per mobile broadband subscription\*:  
**12.4 GB**

Mobile Prepaid subscribers:  
**1,227,287**

% of Prepaid of Mobile Market:  
**69%**

Mobile Postpaid subscribers:  
**554,830**

% of Postpaid of Mobile Market:  
**31%**



Fixed-telephony subscribers:  
**226,964**

Penetration:  
**15%**

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



Fixed Wired Telephony subscribers:  
**88%**

Fixed Wireless Telephony subscribers:  
**12%**



International Outgoing Minutes (Mobile):  
**262,069,443**

International Outgoing Minutes (Fixed telephony):  
**1,066,733**

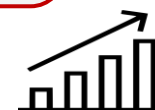


Mobile Broadband subscriptions:  
**1,754,672**

Mobile Broadband penetration rate:  
**119%**

Fixed Broadband subscriptions:  
**149,058**

Fixed Broadband penetration rate:  
**10%**



Total Data Usage:  
**304 Petabyte**

Fixed Broadband Traffic:  
**171 Petabyte**

Mobile Broadband Traffic\*\*:  
**133 Petabyte**

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

Avg. Fixed Broadband Traffic per month:  
**382 GB**

Avg. Mobile Broadband Traffic per month\*\*:  
**25 GB**

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

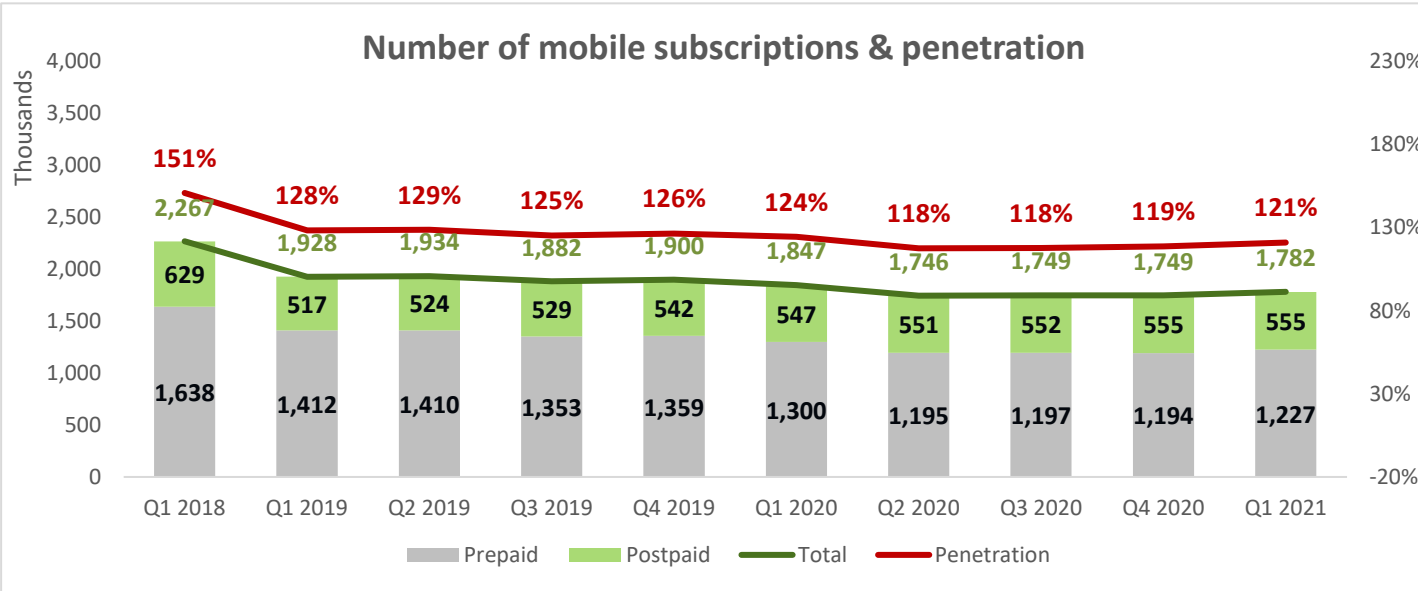
\*\* Includes Broadband added to voice & Standalone mobile broadband

# Mobile services: Subscriptions

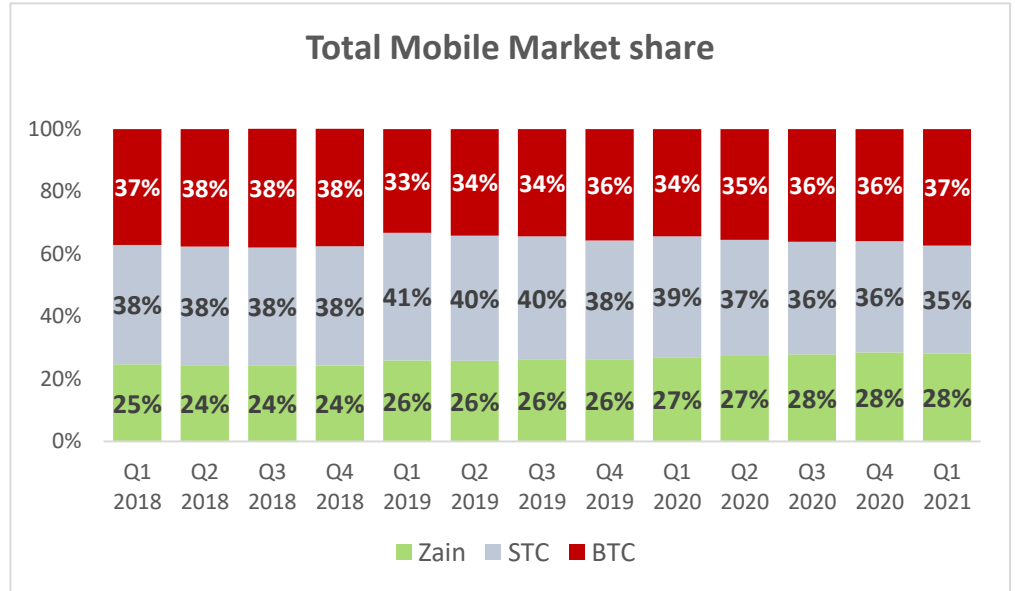


**Number of Mobile subscriptions (End of Q1 2021)**  
**1,782,117 Subscriptions**  
 121% Penetration rate

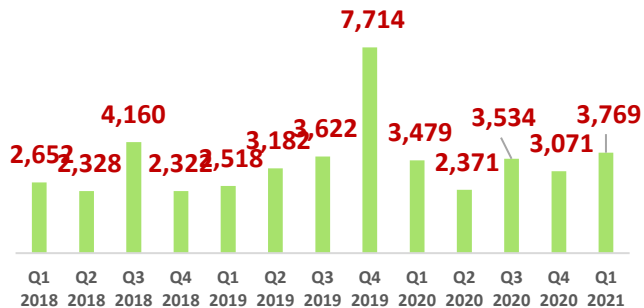
### Number of mobile subscriptions & penetration



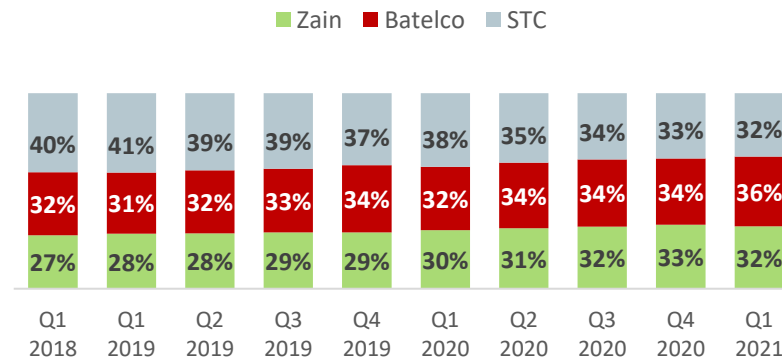
### Total Mobile Market share



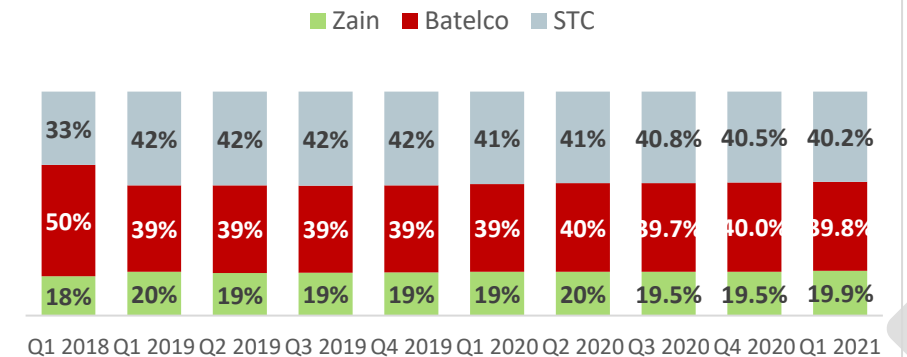
### Number of Accepted Mobile Porting Requests



### Mobile Prepaid subscribers



### Mobile Postpaid subscribers



Population	2017	2018	2019	2020	2021
By IGA	1,501,116	1,503,091	1,484,756	1,472,204	1,472,204

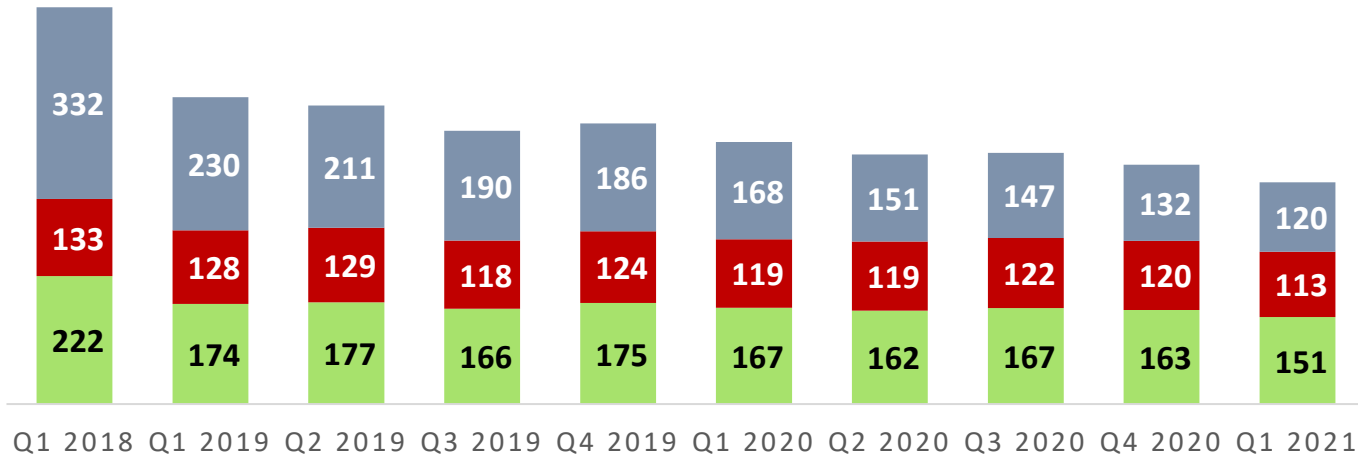
# Mobile services: Traffic (Minutes)



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

Total Domestic Prepaid Outgoing Mobile Traffic in Million

Zain Batelco STC



Q1 2020

1,328,763,338

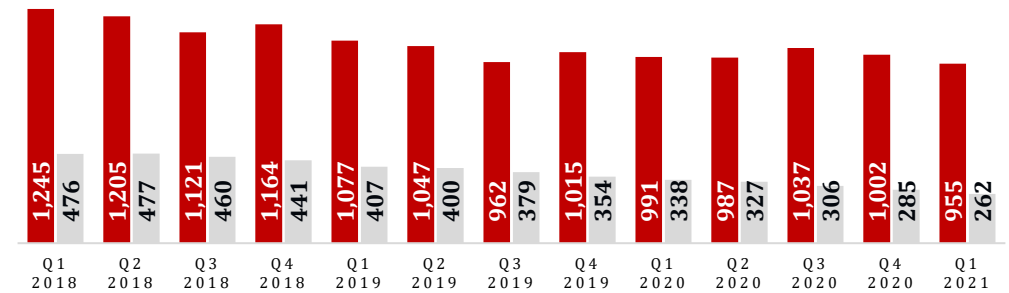
Q1 2021

1,216,959,215

▼  
8%

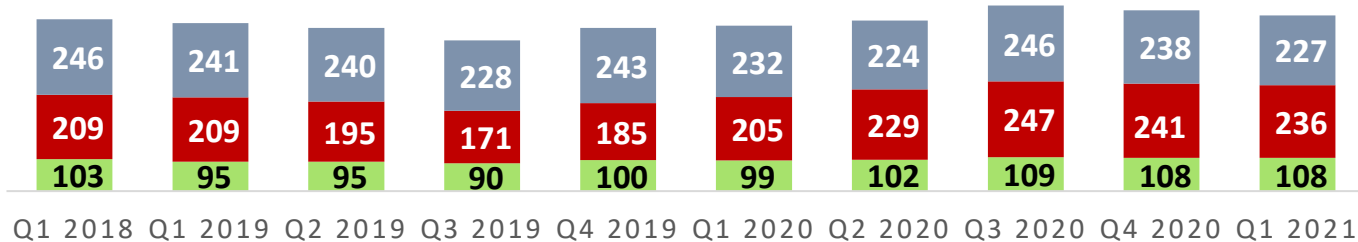
Total Outgoing Mobile Voice Traffic in Millions of Minutes  
(Domestic-International)

Domestic International

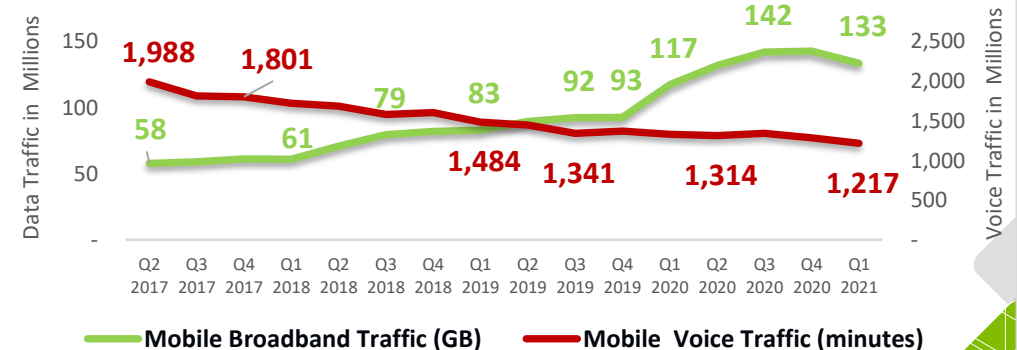


Total Domestic Postpaid Outgoing Mobile Traffic in Million

Zain Batelco STC



Mobile Voice Traffic Vs Mobile Broadband Data Traffic



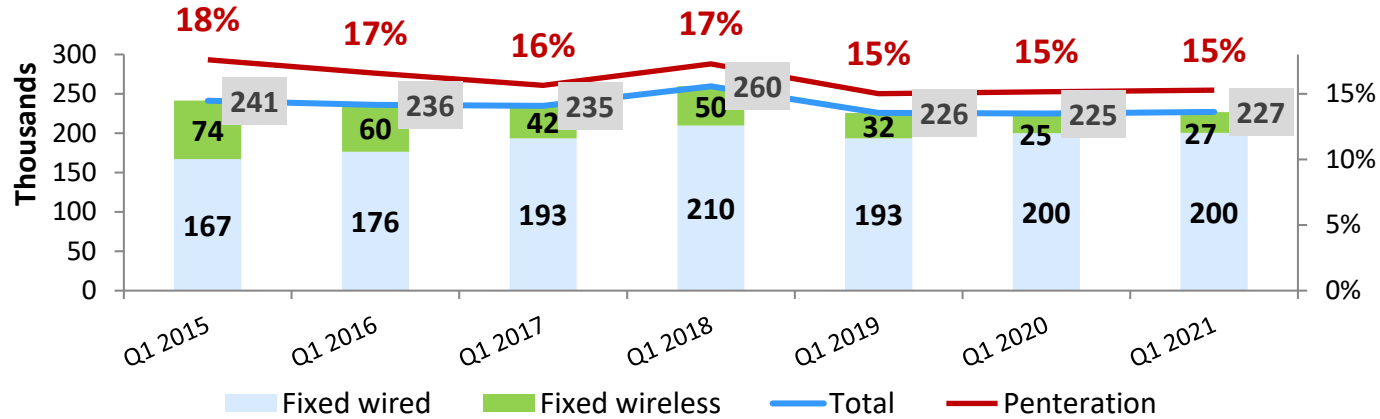
\* Revised for 2019 data

# Fixed telephony services: Subscriptions (PSTN & Wireless)



No. of fixed telephony subscriptions

### Number of fixed lines



End of Q1 2020

**225,055**

15% Penetration rate

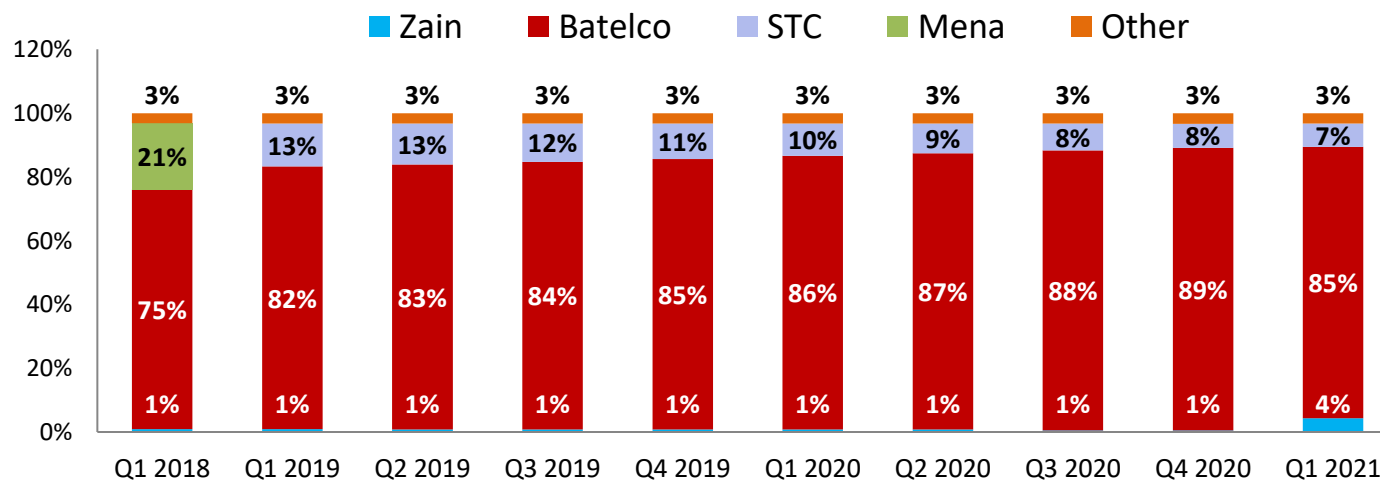
End of Q1 2021

**226,964**

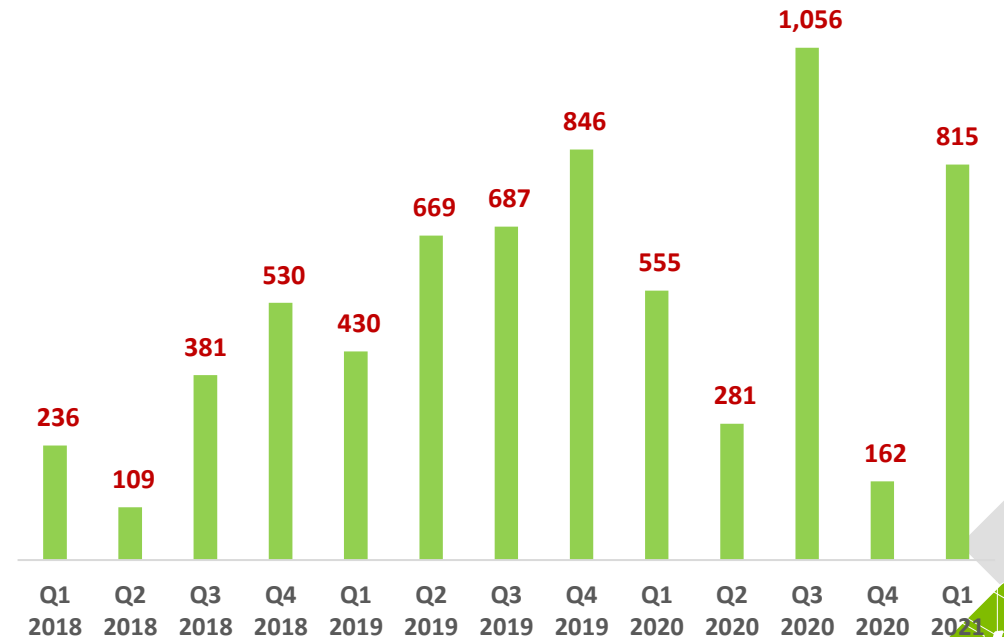
15% Penetration rate

	2018	2019	2020	Q1 2021
<b>Total</b>	<b>225,479</b>	<b>224,962</b>	<b>220,435</b>	<b>226,964</b>
% of Fixed Wired	85%	88%	92%	88%
% of Fixed Wireless	15%	12%	8%	12%

### Fixed telephone lines market share



### Number of Accepted Fixed Line Porting Requests



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



Total fixed domestic outgoing traffic in minutes\*\*

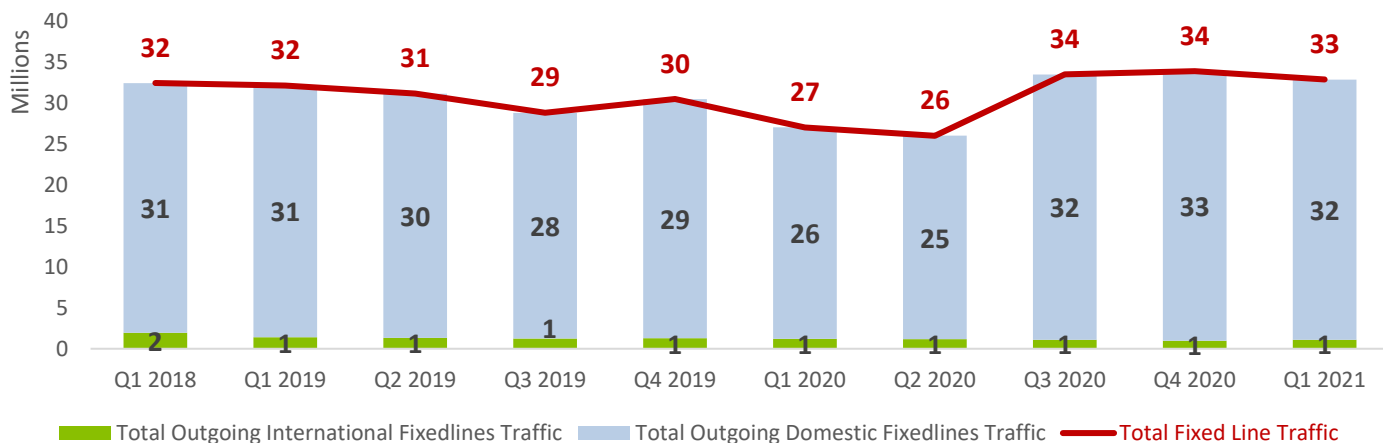
▲  
22%

Q1 2020  
**27,038,937**

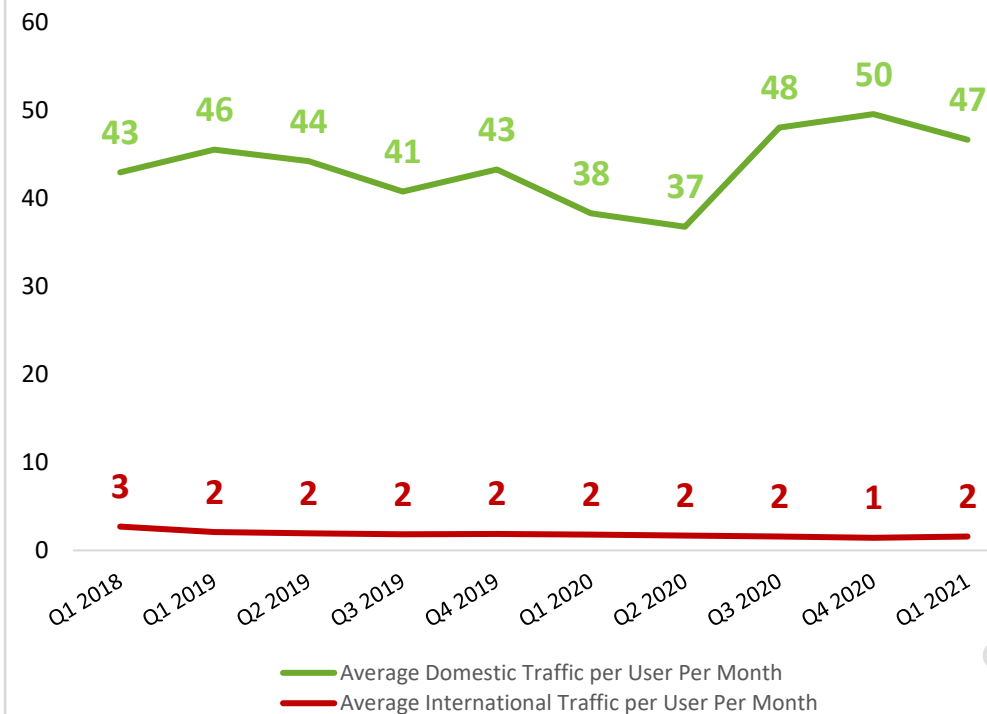
Q1 2021  
**32,882,415\***

\*Increase in traffic is due to an operator reporting VoIP traffic as of 2021

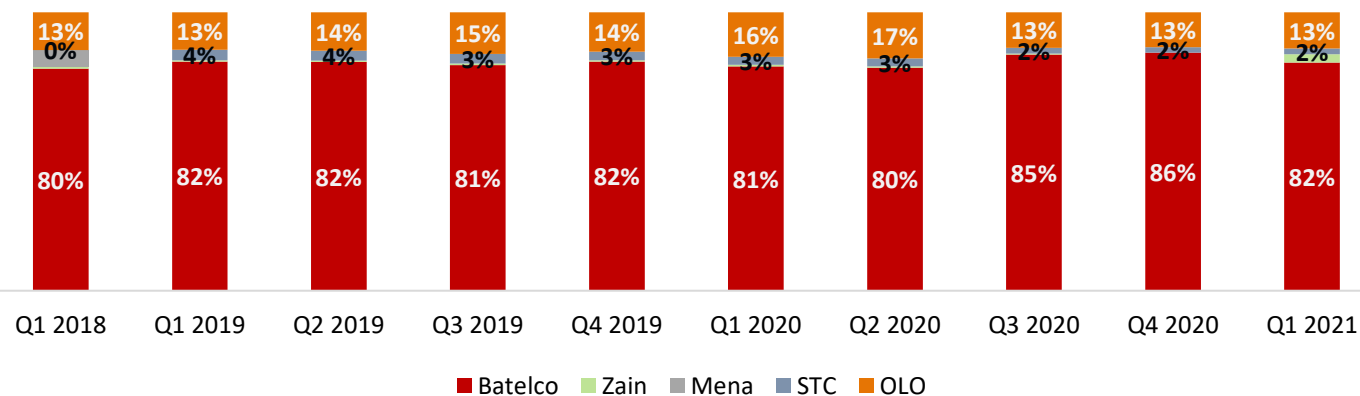
Fixed Line Domestic & International Outgoing Traffic (Minutes)



Monthly Average Outgoing Domestic & International Minutes Per Subscription



Fixed Domestic Traffic Market Share



\* International Outgoing Minutes originated from ISDN traffic is not included in the chart above

\*\* Revised for 2019 data

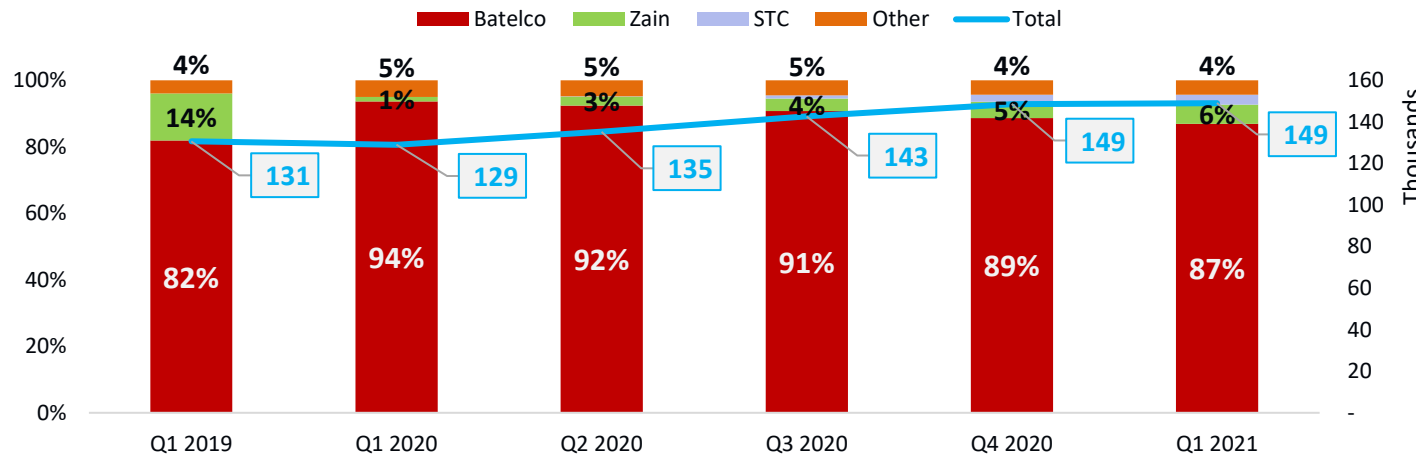


# Broadband services: Subscriptions\*\*

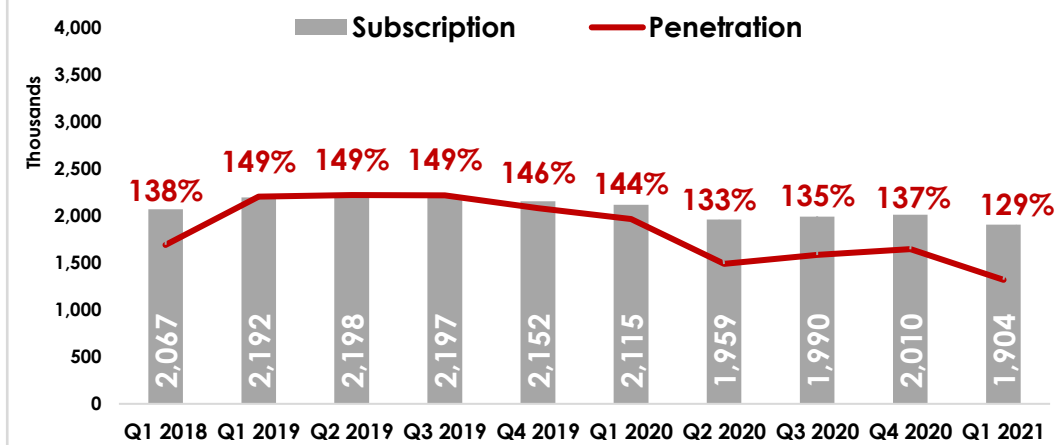


No. of broadband subscriptions (End of Q4 2020)\*  
**1,903,730**  
 129% Penetration rate

### Fixed Broadband Subscriptions Market Share

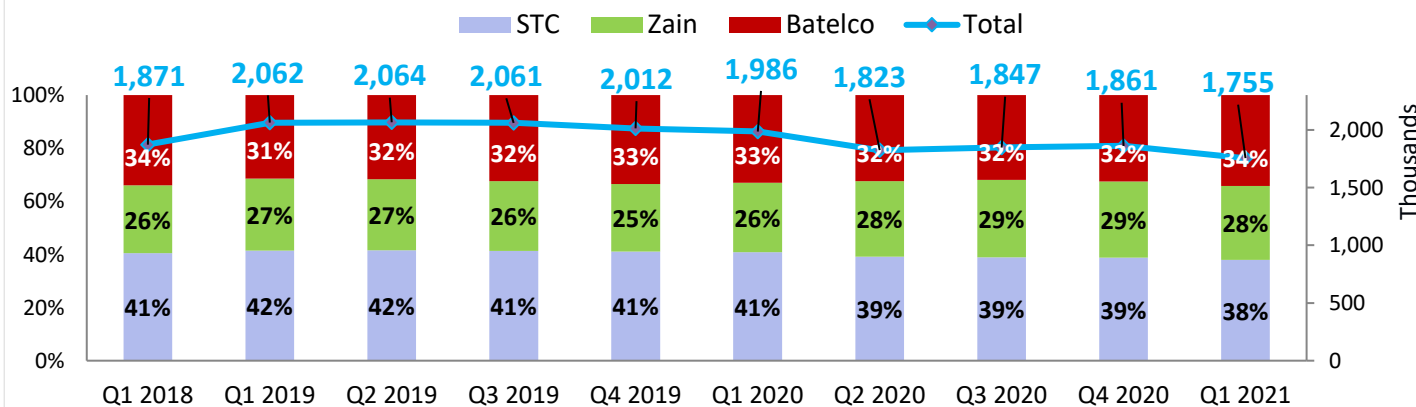


### Broadband Subscriptions and Penetration



\*Fixed Broadband includes Fixed wired and Fixed wireless

### Mobile broadband subscriptions market shares (Pay-per-use + Add-on to voice + Standalone)



### Mobile Broadband – Q1 2021



### Proportion of broadband subscriptions by access type – Q1 2021

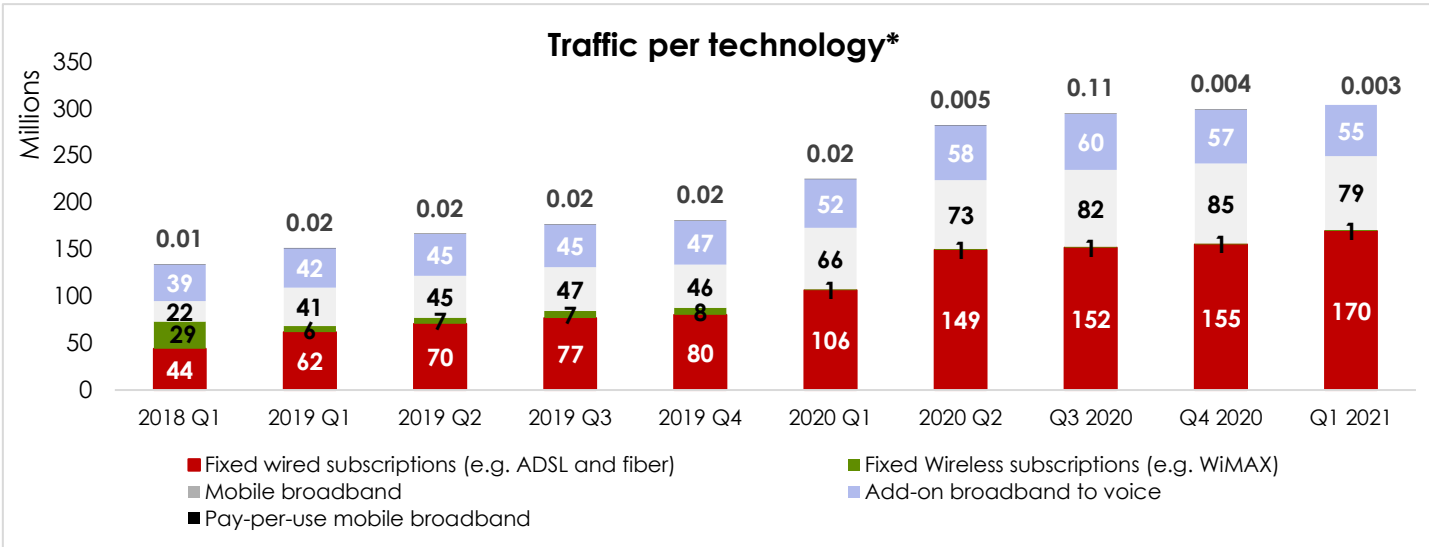


\*\* Standalone numbers have been revised from Q3 2019 as M2M subscribers have been removed from the total number.

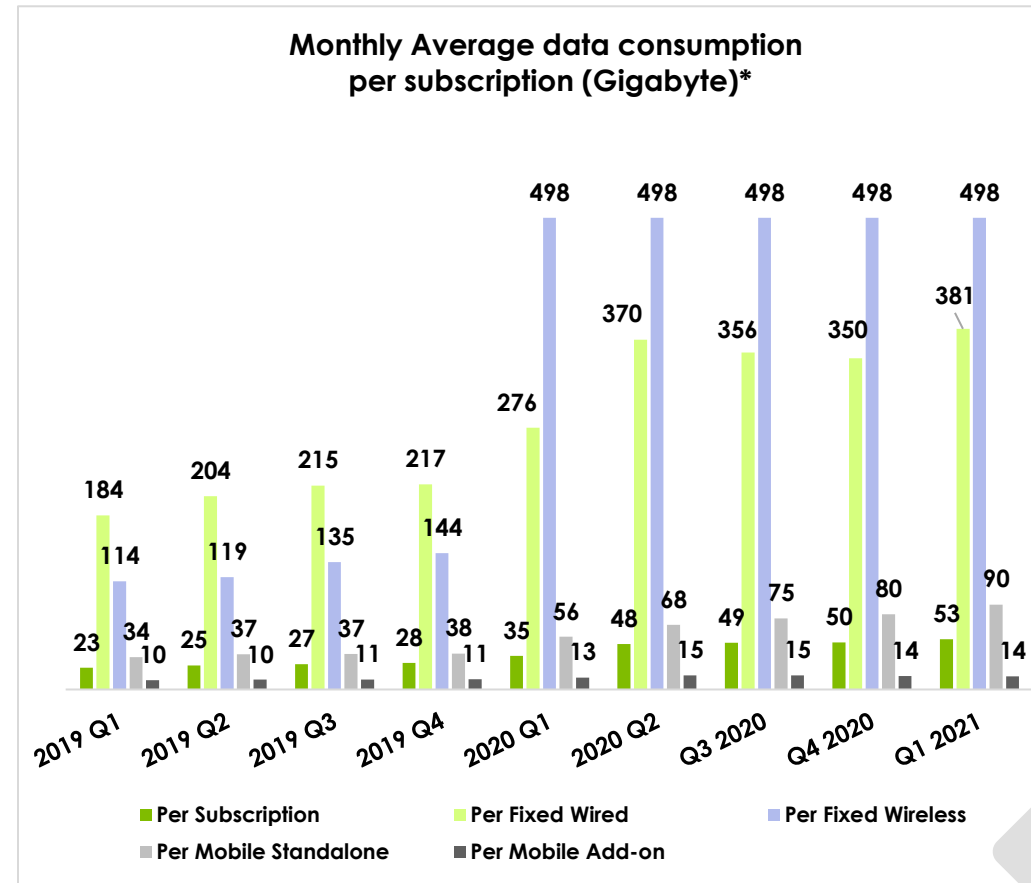
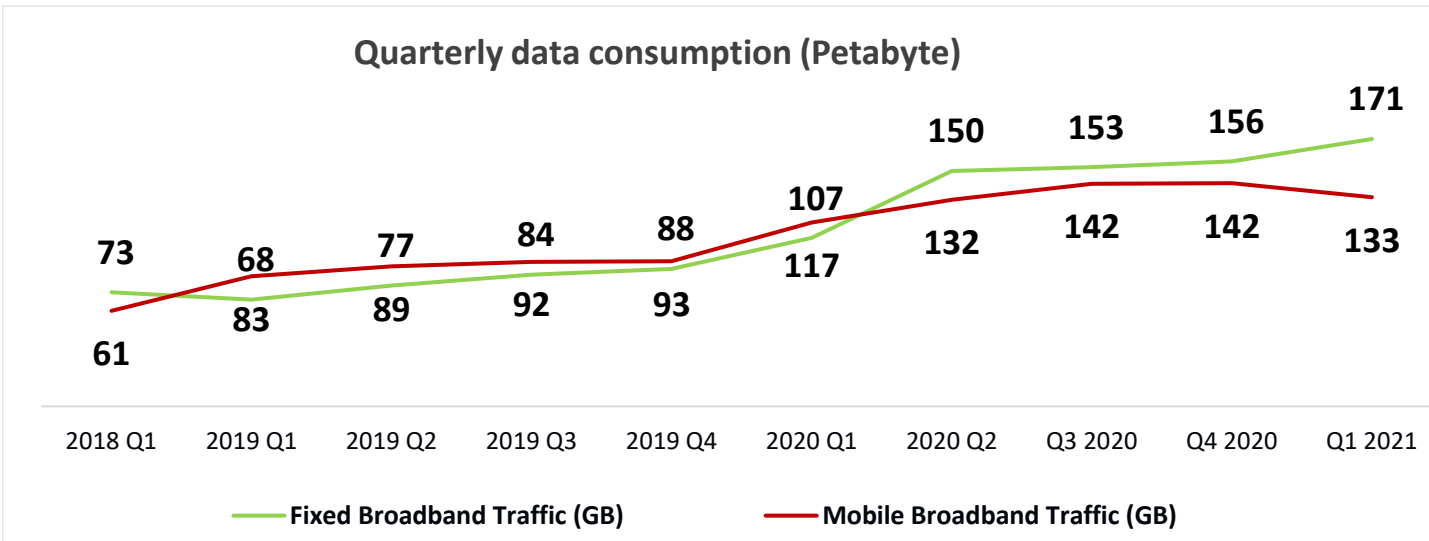
# Broadband services: Data Traffic 1 of 2\*



Total data traffic in Gigabyte



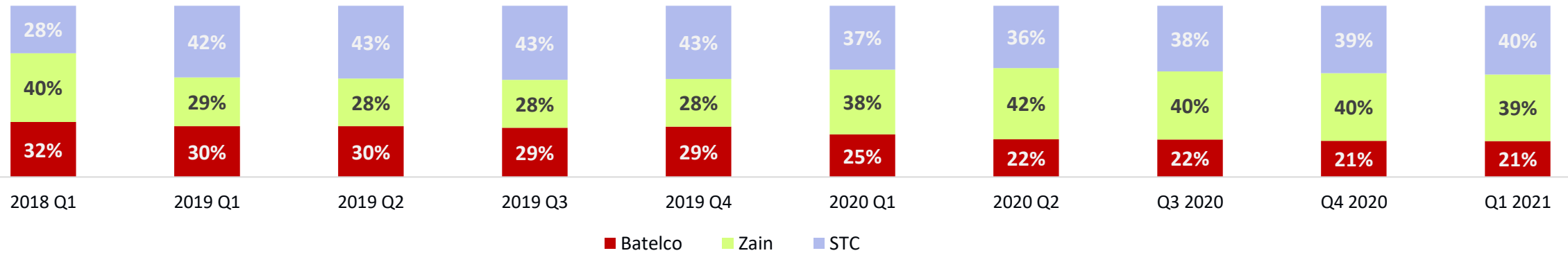
\*Fixed wired data traffic was revised from June 2018



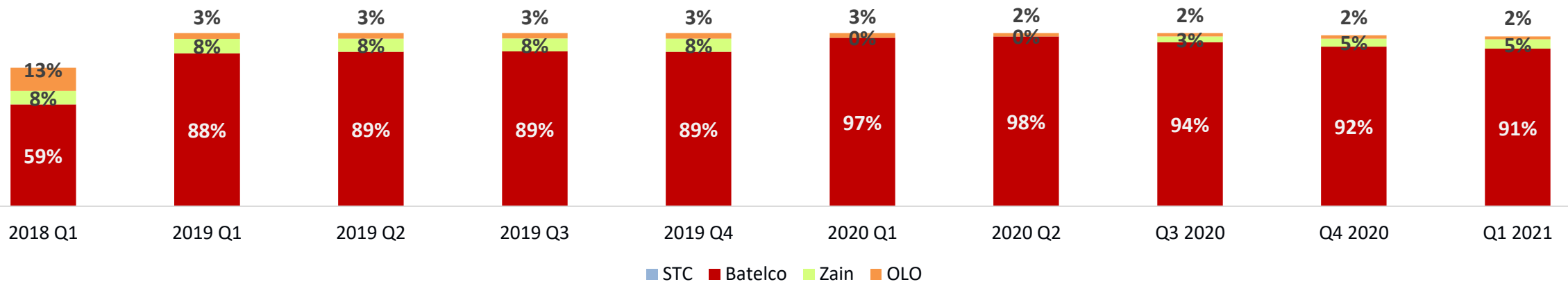
\*Average fixed wireless traffic is relatively high due to non-residential subscribers having high usage

# Broadband services: Data Traffic 2 of 2

## Mobile Broadband Traffic Market Share (Pay-Per-Use, Standalone & Add-on)



## Fixed Broadband Traffic Market Share

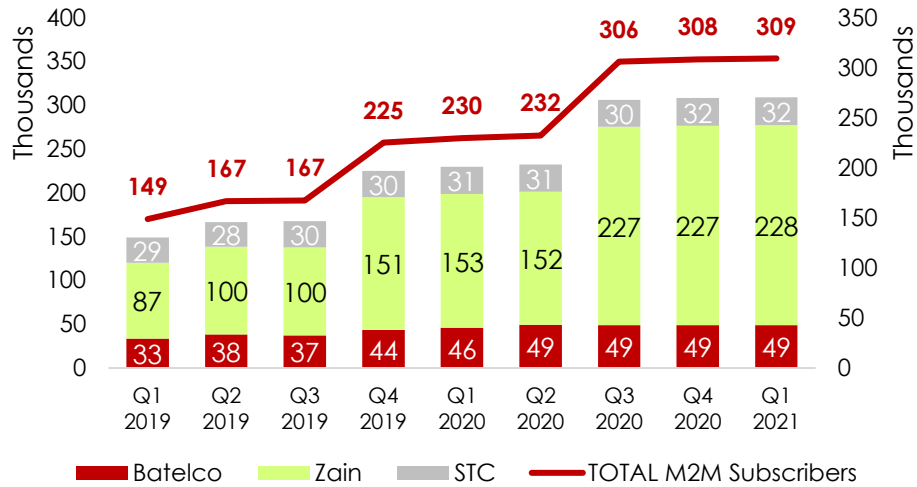


\*Fixed wired data traffic was revised from June 2018.

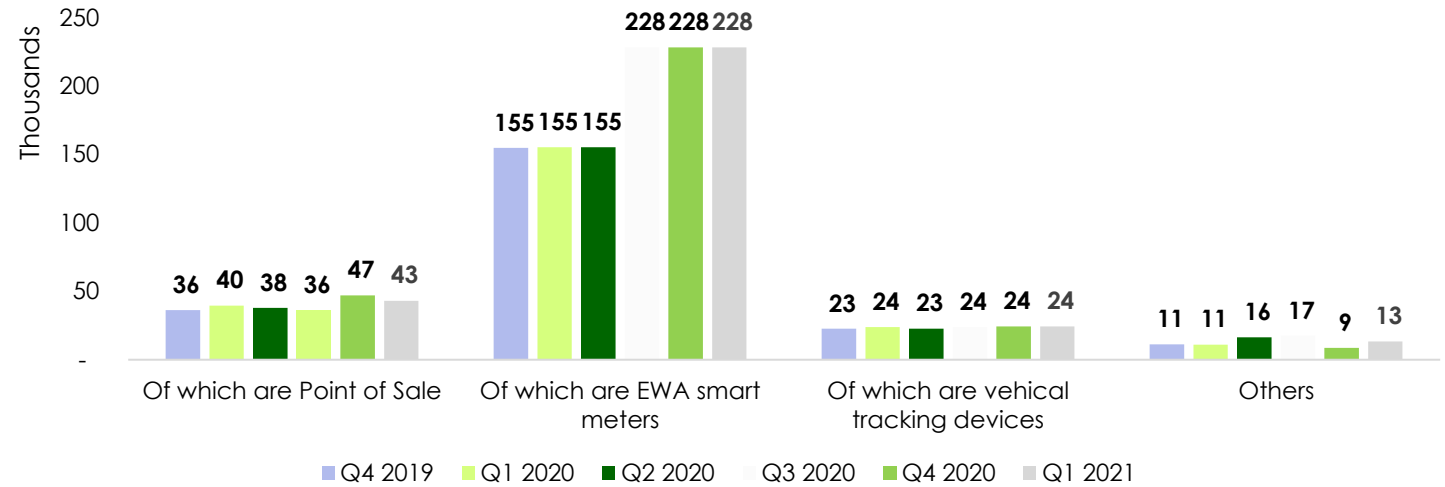
\*\*An operator's internet broadband services which are provided over TDD LTE network under Fixed Wireless have been included under Mobile Standalone as of 2020.

# M2M Subscribers & Traffic

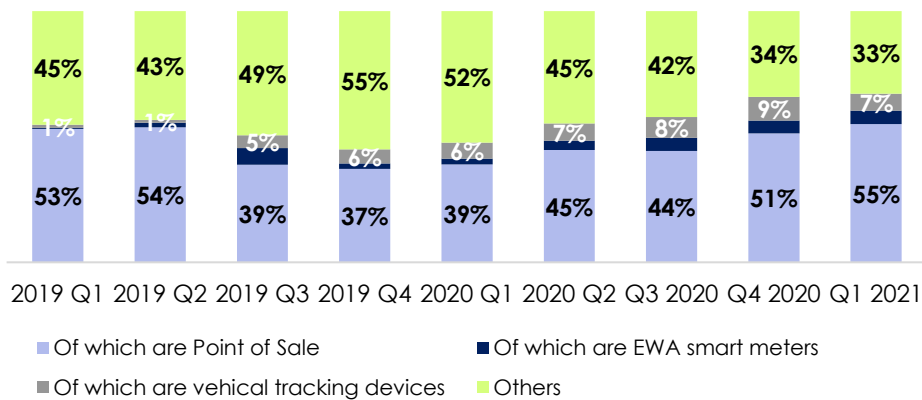
### M2M Subscribers (Thousands)



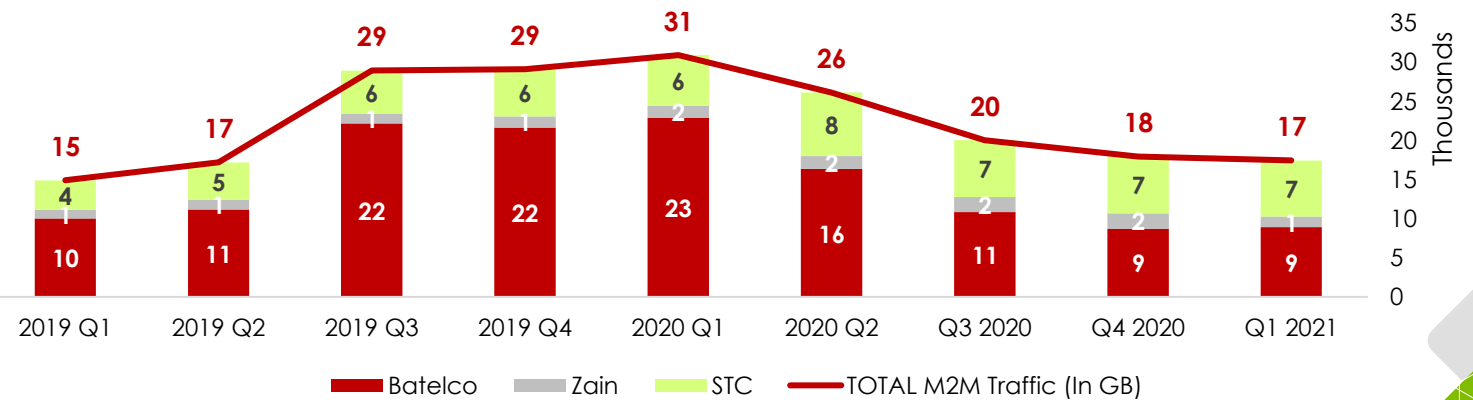
### M2M Subscribers by type



### M2M Traffic by Type (GB)



### M2M Traffic



\*Fixed wired data traffic was revised from June 2018

# 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.g

## 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