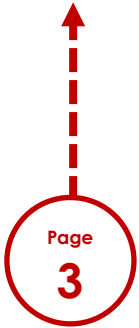


Quarterly Market Indicators

Q2 2020

Content

Disclaimer



Fixed line
telephony services



M2M Subscribers
& Traffic



Mobile services



Broadband services



Definitions



Disclaimer

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Main Market Indicators for Q2 2020



Mobile subscribers:
1,745,572

Penetration:
118%

Average minutes per
month per mobile
subscription:
247

Average data usage
per mobile broadband
subscription*:
13 GB



Mobile Prepaid
subscribers:
1,194,532

% of Prepaid of Mobile
Market:
68%



Mobile Postpaid
subscribers:
551,040

% of Postpaid of Mobile
Market:
32%



Fixed-telephony
subscribers:
226,471

Penetration:
15%

Domestic **monthly**
average minutes per
line:
37



Fixed Wired Telephony
subscribers:
90%

Fixed Wireless
Telephony subscribers:
10%



International Outgoing
Minutes (Mobile):
327,187,369

International Outgoing
Minutes (Fixed telephony):
1,141,280



Broadband
subscriptions:
1,945,057

Broadband
penetration rate:
131%



Total Data Usage:
286 Petabyte

Avg. Traffic per
broadband
subscription per
month:
49 GB

Fixed Broadband
Traffic:
166 Petabyte

Avg. Fixed
Broadband Traffic
per month:
363 GB

Mobile
Broadband
Traffic**:
119 Petabyte

Avg. Mobile
Broadband Traffic
per month:
22 GB

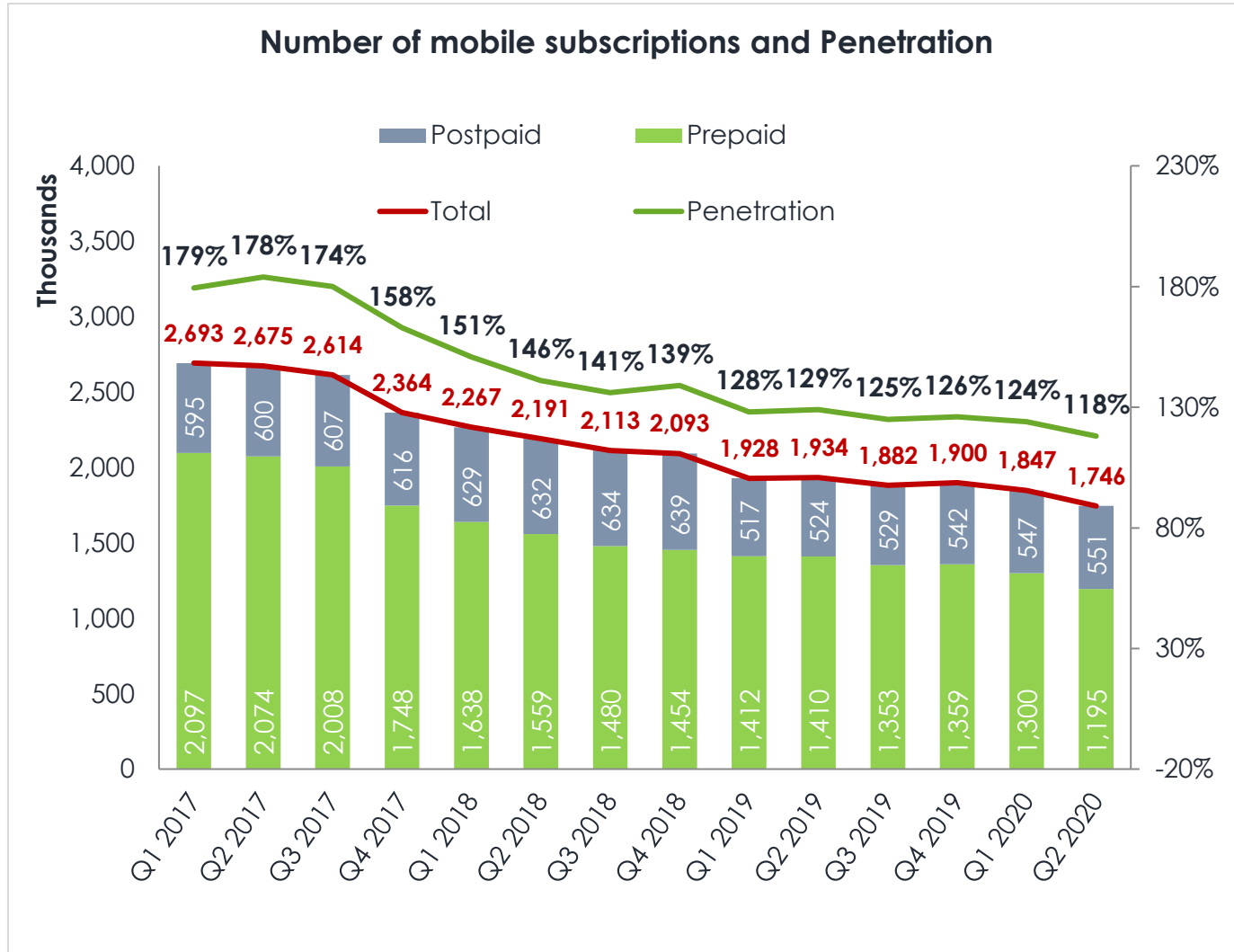
*Average data usage per mobile broadband subscription excludes Standalone subscribers' traffic

** Includes Broadband added to voice & Standalone mobile broadband

Mobile services: Subscriptions

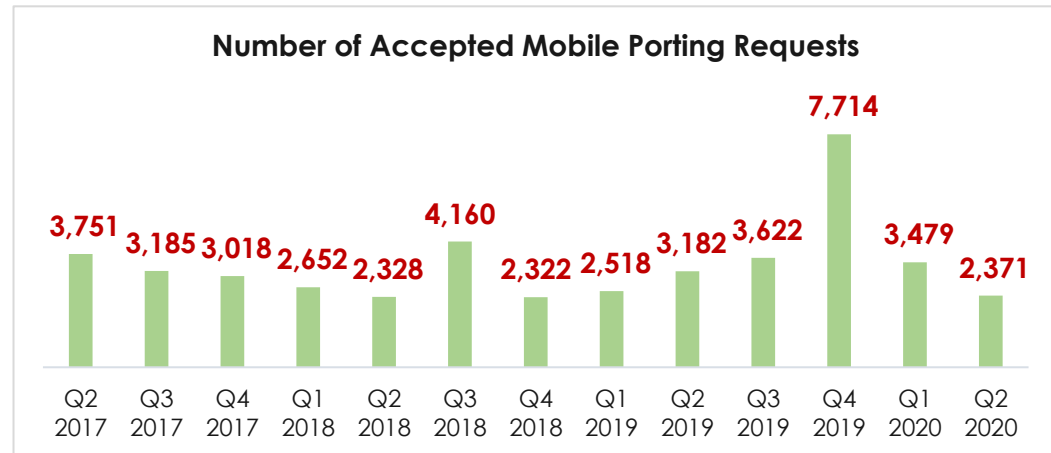


Number of Mobile subscriptions (End of Q2 2020)
1,745,572 Subscriptions
 118% Penetration rate



	2017	2018	2019	Q2 2020
Total	2,364,477	2,092,714	1,900,361	1,745,572
% of Prepaid	74%	69%	71.5%	68%
% of Postpaid	26%	31%	28.5%	32%

- Between Q2 2019 and Q2 2020, mobile subscriptions decreased by **10%**.
- On the other hand, Postpaid subscribers increased for the same period by **5%** while Prepaid subscribers declined by **15%**.
- Penetration rate declined to reach **118%** at the end of Q2 2020 relative to 126% at the end of 2019.
- Number of accepted ported mobile lines dropped even further to reach **2,371** in Q2 2020 relative to **3,479** in Q1 2020.



Population	2016	2017	2018	2019	2020
By IGA	1,423,726	1,501,116	1,503,091	1,484,756	1,484,756

Mobile services: Traffic (Minutes)

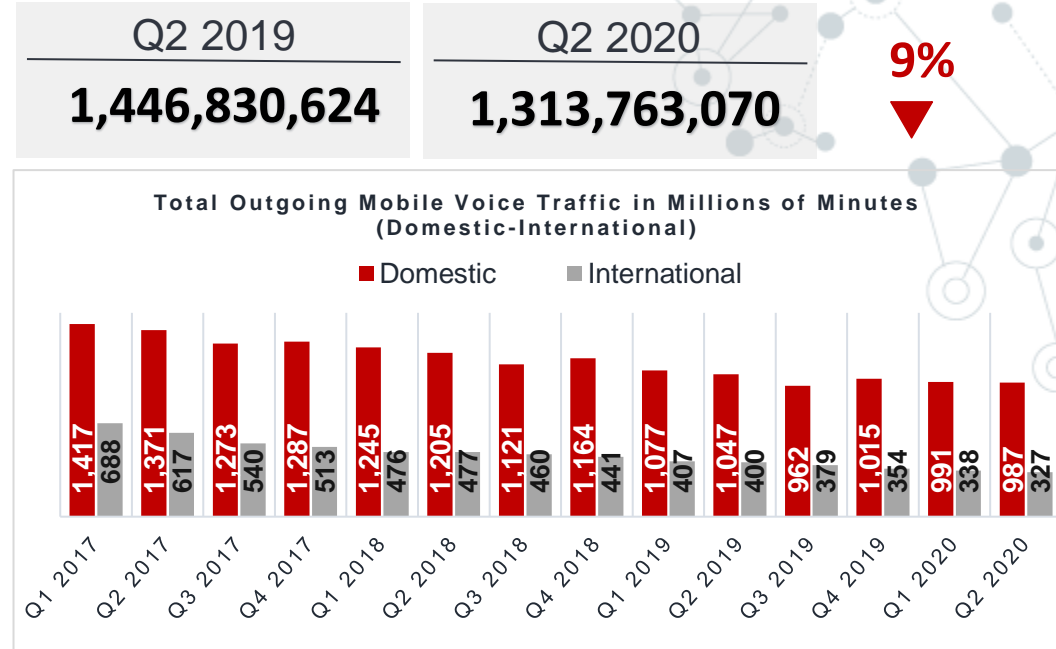
For the same period, Domestic mobile prepaid outgoing minutes declined by **16%** while domestic mobile postpaid minutes declined by **5%**. Overall, total domestic minutes declined by **6%**.

For mobile international outgoing minutes, prepaid minutes declined by **18%** while postpaid minutes declined by **36%** between Q2 2019 and Q2 2020. Overall, mobile International outgoing minutes declined by **18%** over the same period.

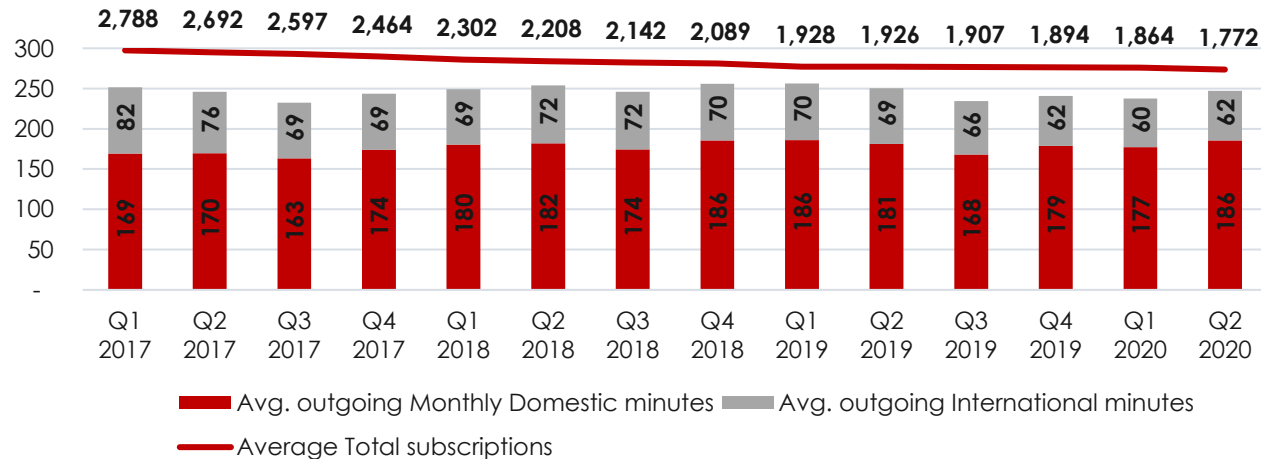
Average monthly minutes per subscription reached **247** minutes in Q2 2020 relative to **250** minutes in Q2 2019. That number comprises average domestic monthly minutes per subscribers of **186** and average international monthly minutes by subscriber of **62**.



Total Outgoing Traffic in Minutes (Domestic + International)*

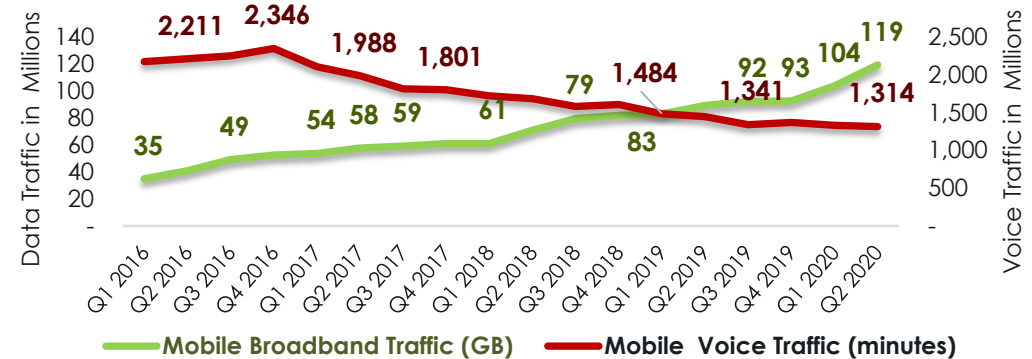


Average Monthly Minutes Per User



Thousands

Mobile Voice Traffic Vs Mobile Broadband Data Traffic



* Revised for 2019 data

Fixed telephony services: Subscriptions (PSTN & Wireless)

Between Q2 2019 and Q2 2020, fixed telephony subscriptions slightly dropped by **0.2%**. Fixed wired subscriptions increased by **4%** while fixed wireless subscriptions decreased by **25%**.

Number of ported fixed lines dropped to **281** in Q2 2020 relative to 555 in Q1 2020.



No. of fixed telephony subscriptions

End of Q2 2019

226,004

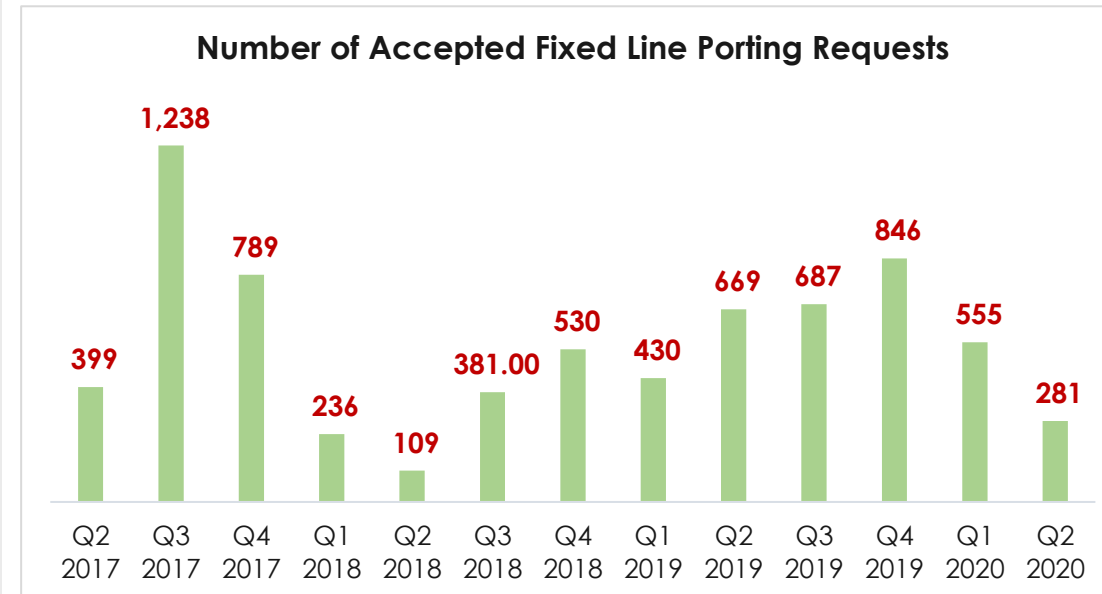
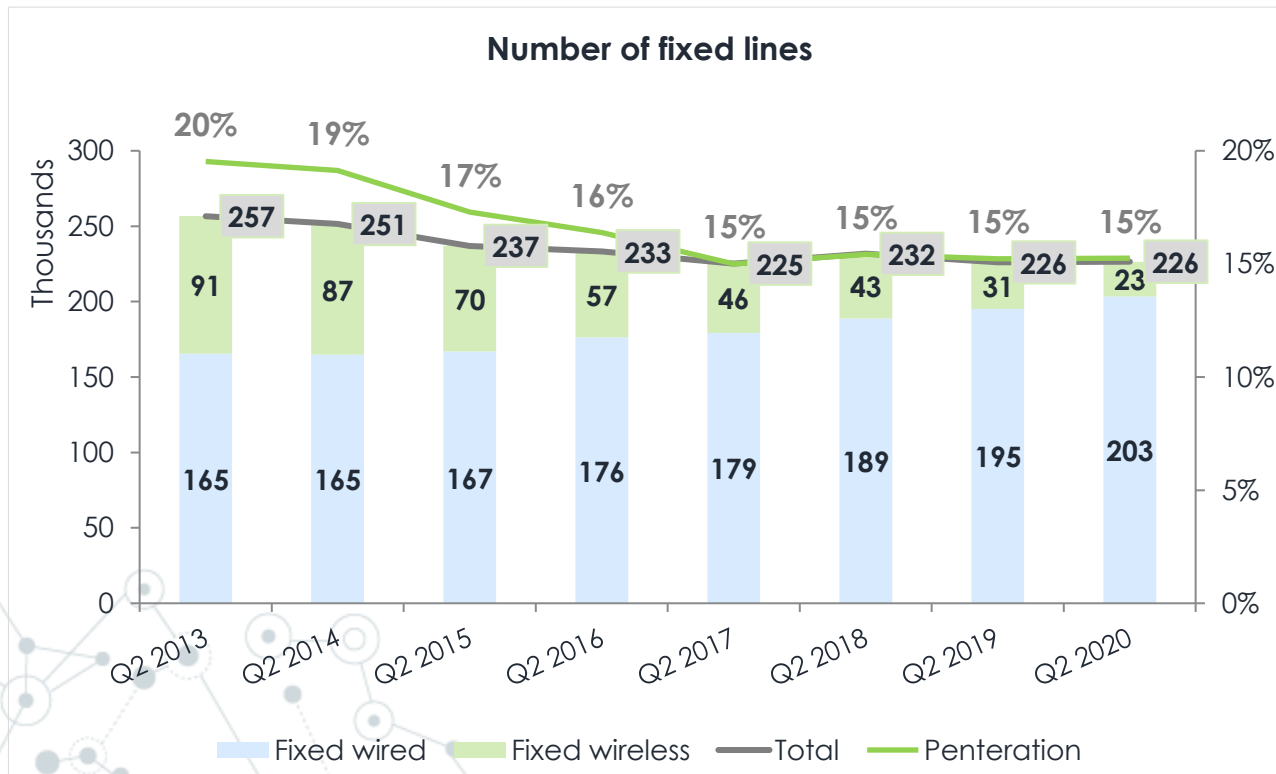
15% Penetration rate

End of Q2 2020

226,471

15% Penetration rate

	2017	2018	2019	Q2 2020
Total	234,709	225,479	225,797	226,471
% of Fixed Wired	79%	85%	88%	89%
% of Fixed Wireless	21%	15%	12%	11%



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

Similarly, fixed telephony outgoing international traffic has decreased by **12%** over the period between Q2 2019 & Q2 2020.

Monthly average outgoing domestic minutes per subscriber decreased to **37** in Q2 2020 relative to **44** minutes in Q2 2019 while monthly average international minutes remained stable at **2** minutes per subscriber for the last 7 quarters.

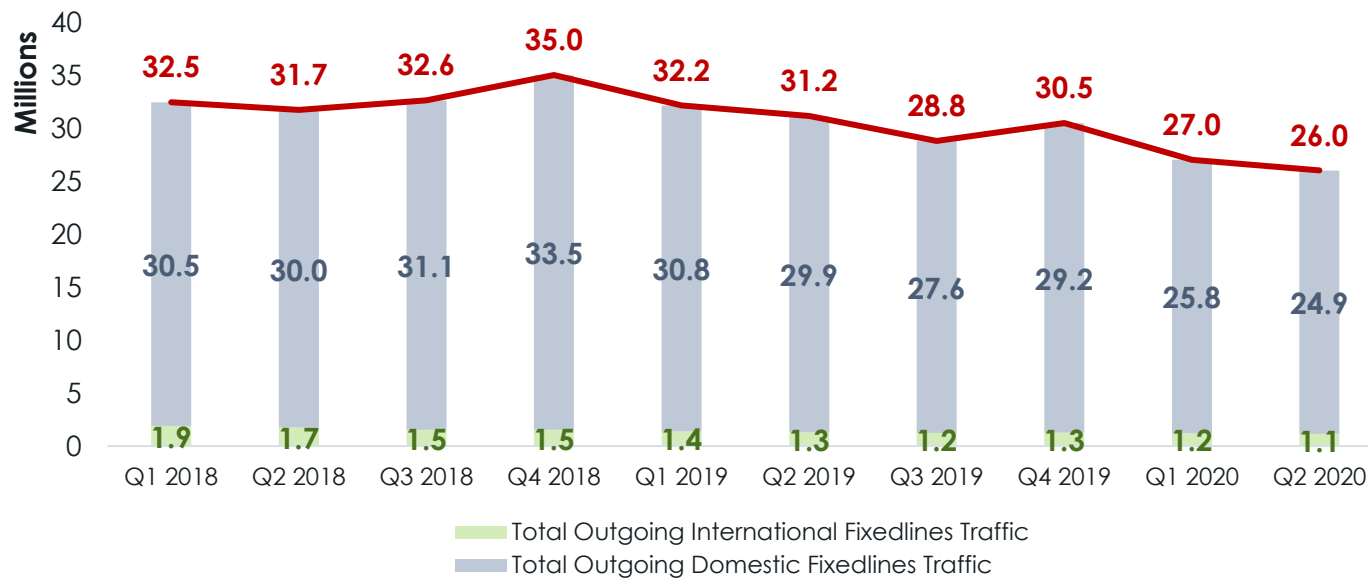


Total fixed domestic outgoing traffic in minutes**

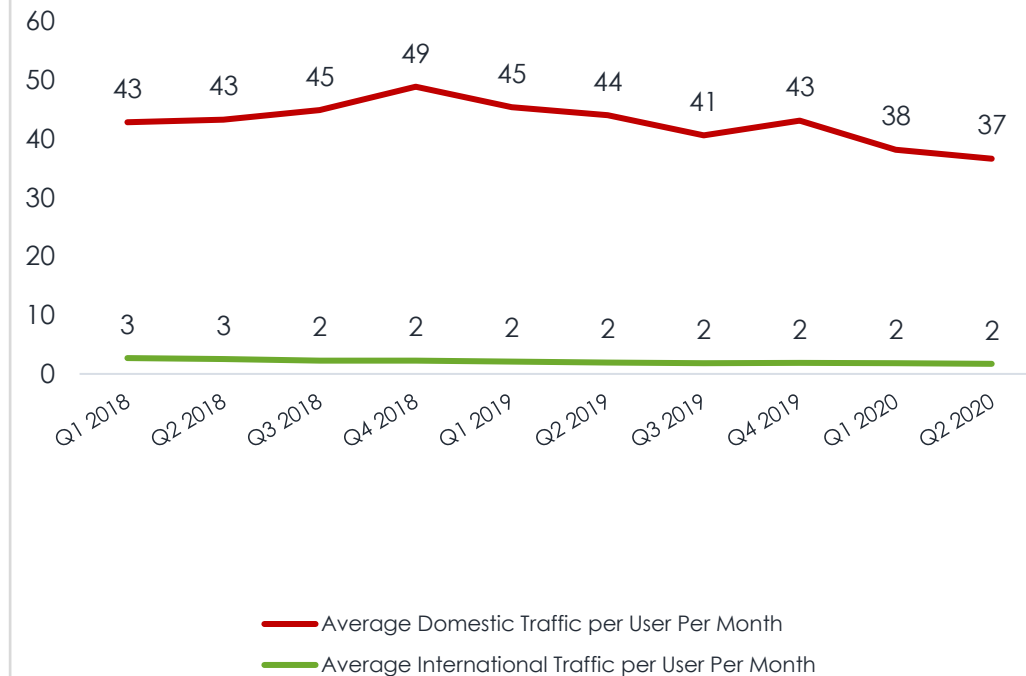
Q2 2019	Q2 2020	
29,858,214	24,879,212	17%



Fixed Line Domestic & International Outgoing Traffic (Minutes)



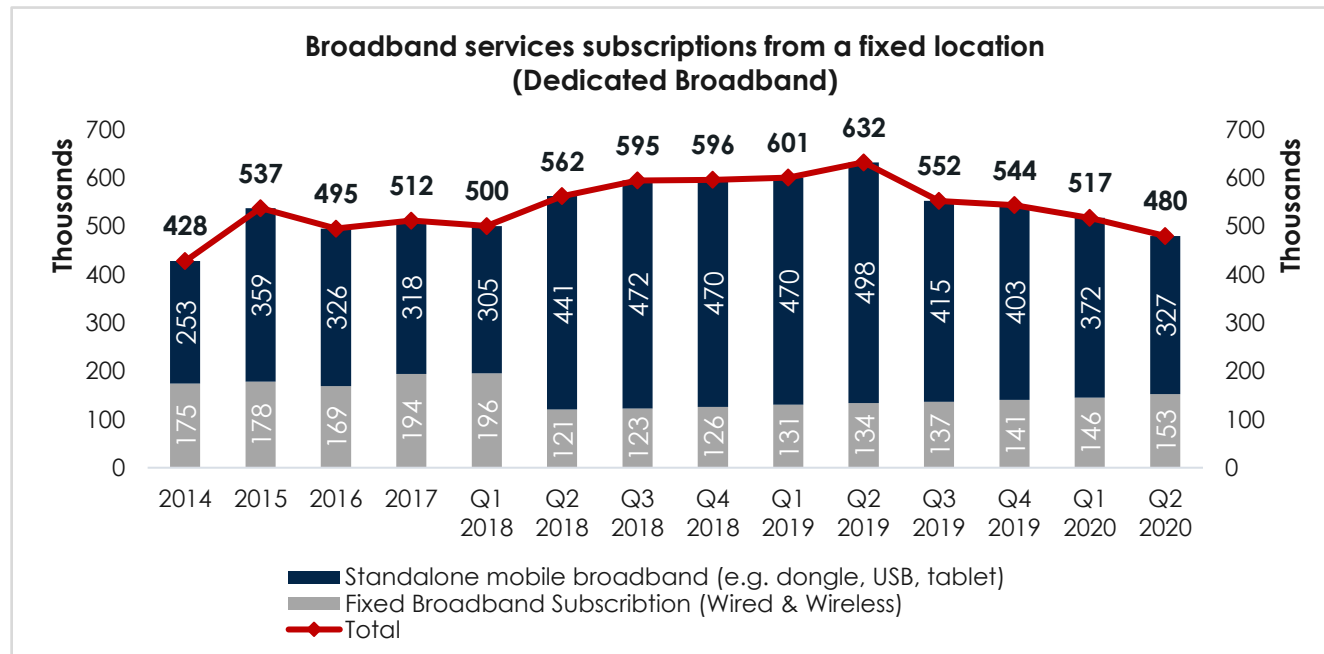
Monthly Average Outgoing Domestic & International Minutes per Subscription



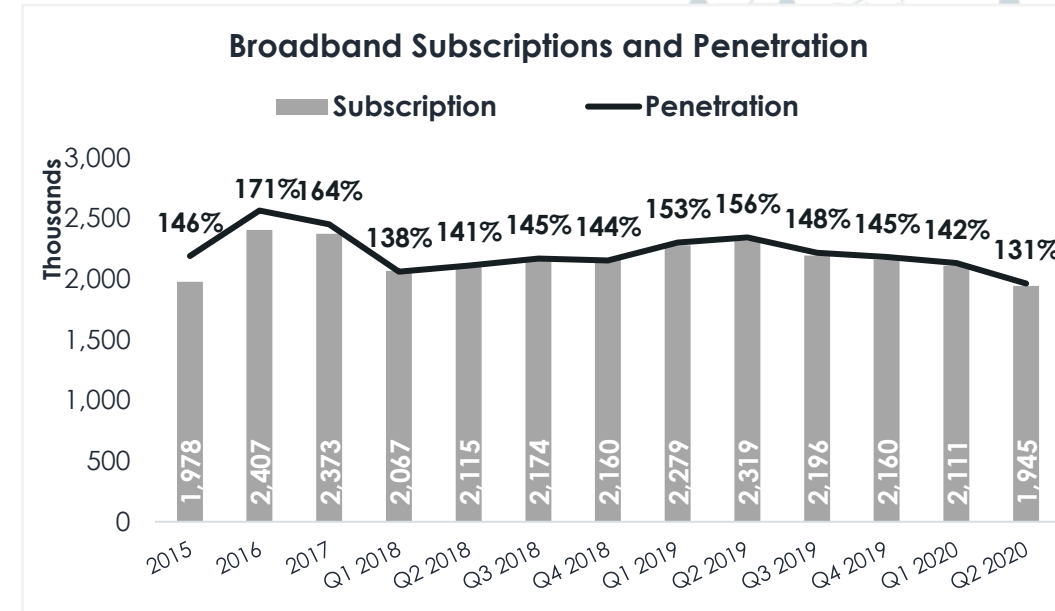
* International Outgoing Minutes originated from ISDN traffic is not included in the chart above
 ** Revised for 2019 data

Broadband services: Subscriptions*

- Between Q2 2019 & Q2 2020 broadband penetration dropped to **131%** and broadband subscriptions decreased by **16%**.
- Between Q2 2019 & Q2 2020 Fixed wired broadband subscription increased by **17%** while fixed wireless decreased by **5%**. The drop in Fixed wireless is mainly due to an operator restating their data and moving subscribers from fixed wireless technology to mobile broadband technology.
- Overall, mobile broadband subscriptions dropped by **18%**. Similarly, standalone broadband subscription also decreased by **34%**.



No. of broadband subscriptions (End of Q2 2020)*
1,945,057
 131% Penetration rate



Mobile Broadband – Q2 2020



Proportion of broadband subscriptions by access type – Q2 2020

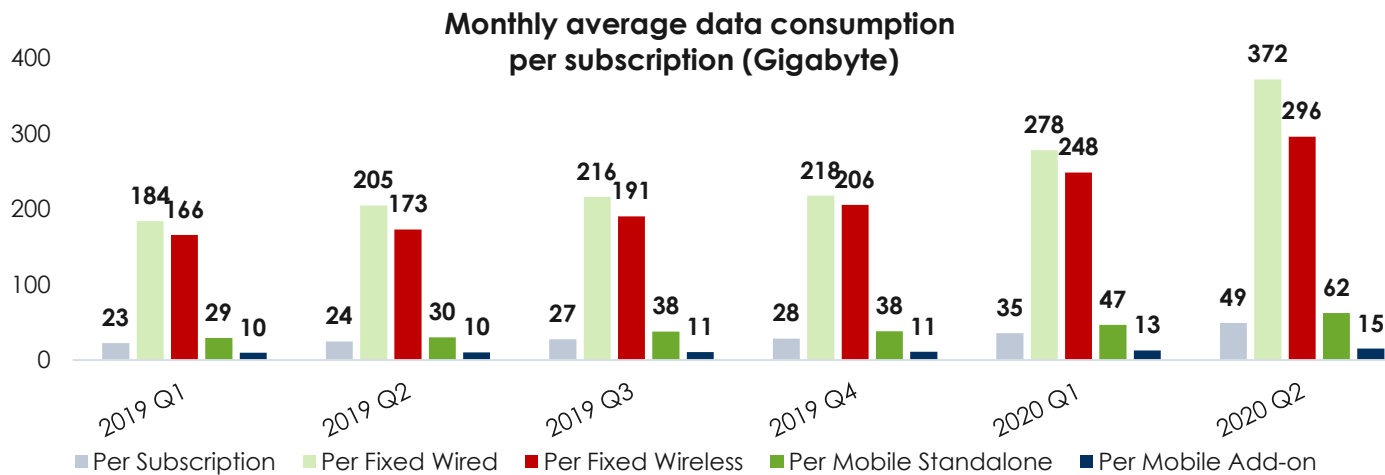
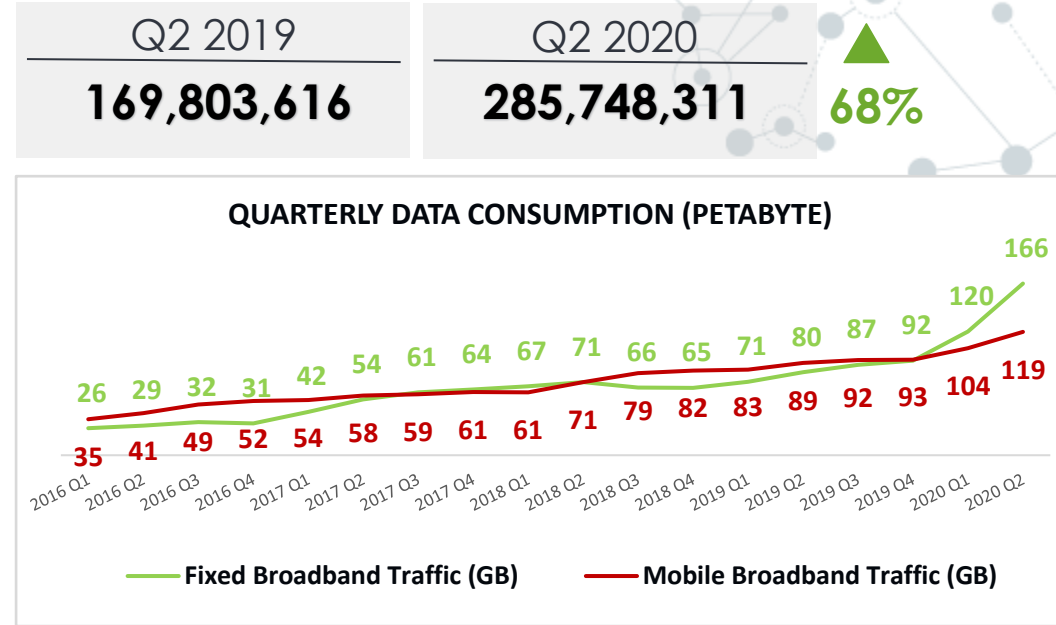
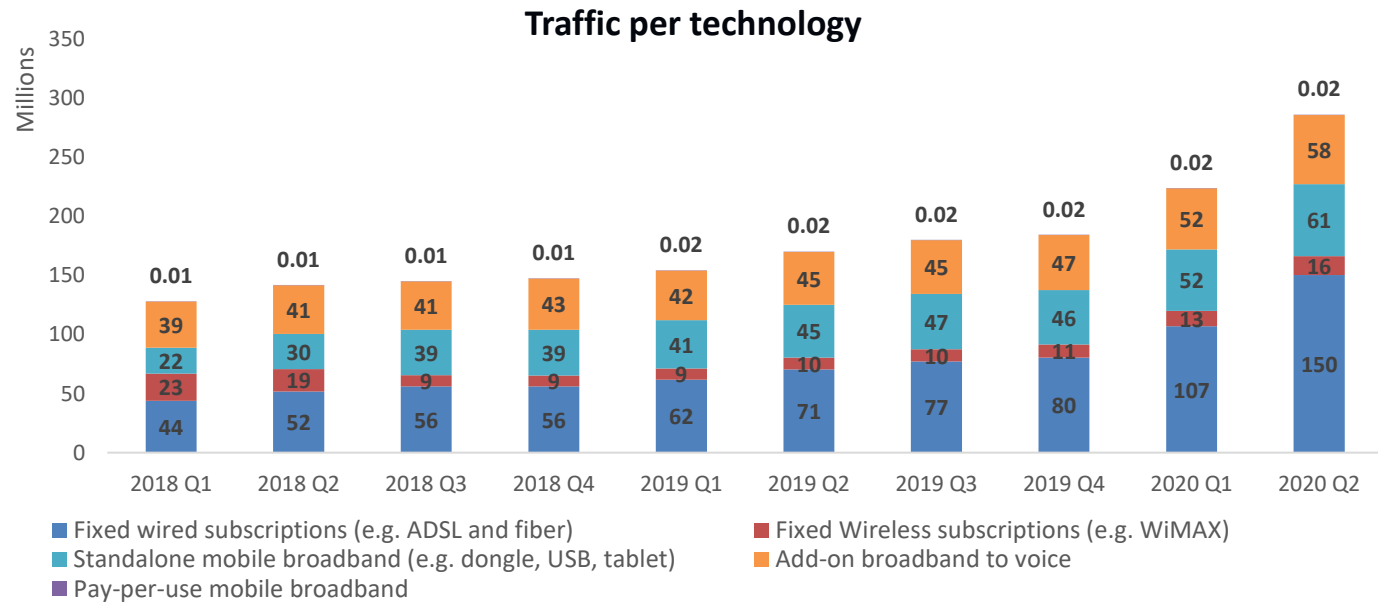


* Standalone numbers have been revised from Q3 2019 as M2M subscribers have been removed from the total number.

Broadband services: Data Traffic*



Total data traffic in Gigabyte



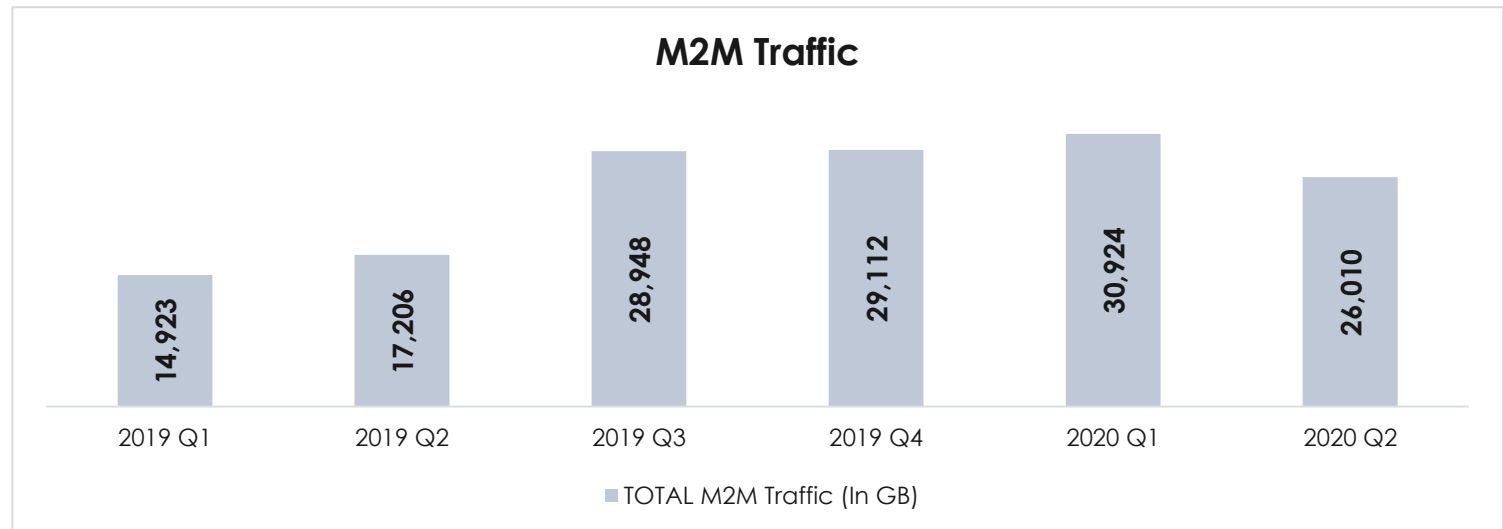
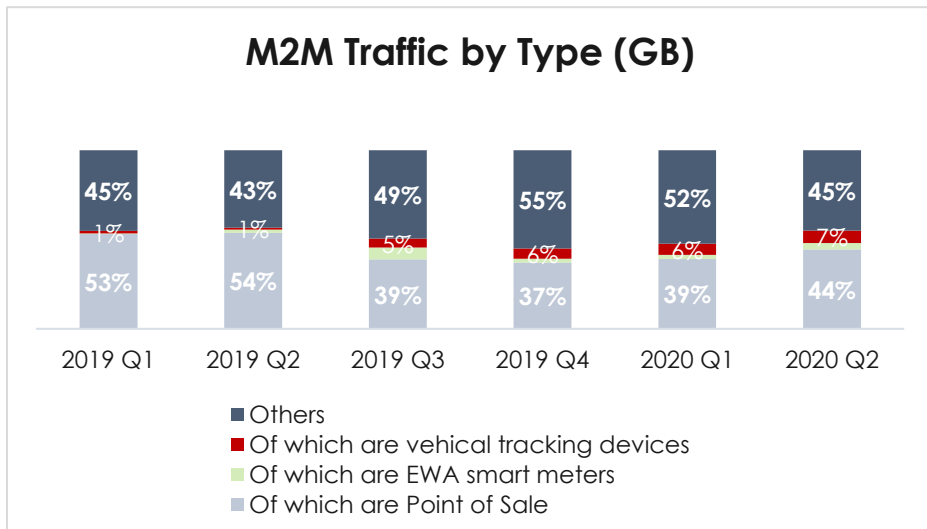
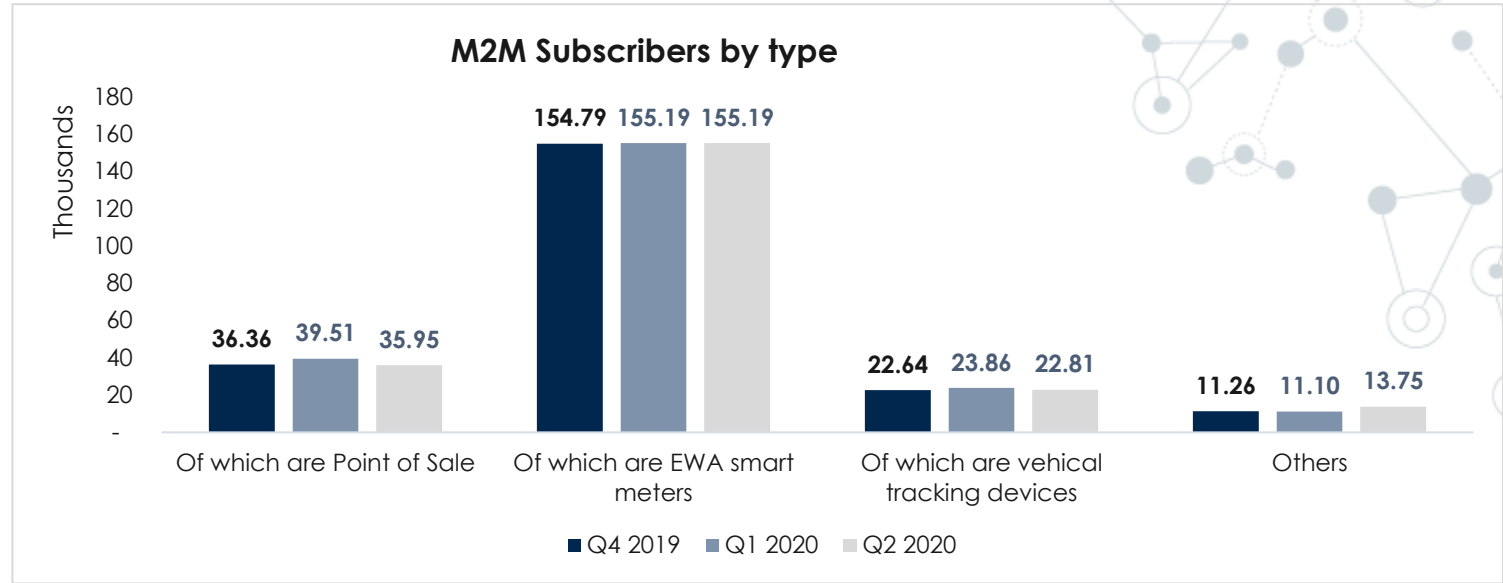
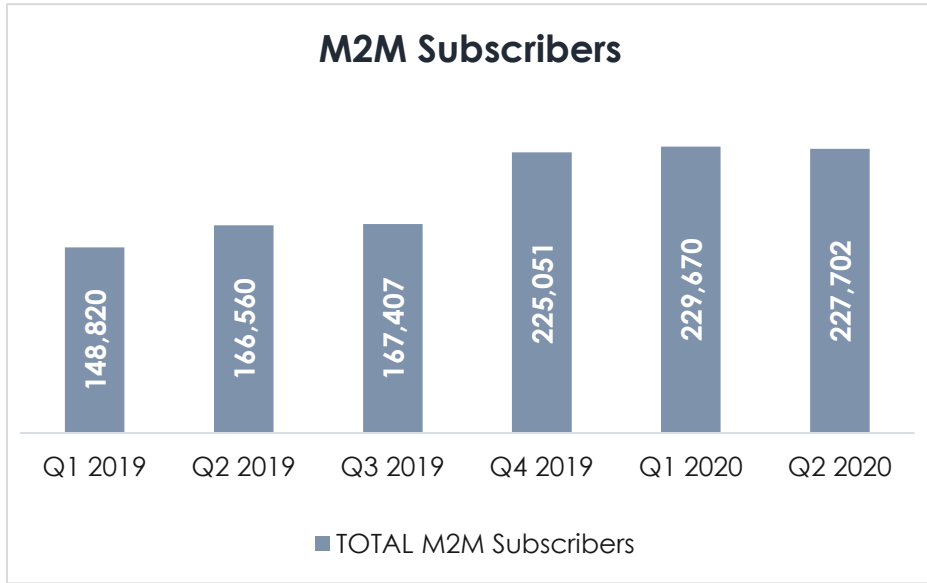
At the end of Q2 2020, Data consumption stood at around **286** petabyte, an increase of around **68%** relative to the same period last year.

Fixed Broadband traffic increased by around **107%** over the same period last year while mobile data consumption increased by **34%**.

The significant spike in data consumption could be affiliated with the recent outbreak known as COVID-19, which caused a shift in service and network usage. This meant that people moved to home offices, online education, online businesses and entertainment as well, hence the spike in data traffic.

*Fixed wired data traffic was revised from June 2018

M2M Subscribers & Traffic



*Fixed wired data traffic was revised from June 2018

Definitions

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

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:

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).

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.

Thank you

