

Quarterly Market Indicators Report

Q1 2024

Disclaimer



3

Mobile services



6-9

Broadband services



12-15

Definitions



17

Main Telecom Market Indicators



4-5

Fixed line telephony services



10-11

M2M subscribers & Traffic



16

Annex A



















20-23

- The TRA has relied on information supplied to it by third parties. It has not independently verified that data and as such does not make any representations or warranties, either express or implied, that:
 - the information is free from inaccuracies, errors or omissions;
 - the information is exhaustive;
 - the information is of merchantable quality and fitness for a particular purpose.

- The TRA, including its officers, board members, employees, agents and contractors, is not liable for:
 - any inaccuracy, error or omission in the information contained in this document; nor
 - any loss, damage, cost or expense whether direct, indirect, consequential or special, incurred by, or arising by reason of, any person using or relying on the information and whether caused by reason of any inaccuracy, error, omission or misrepresentation in the information or otherwise.

Main Telecom Market Indicators (Q1 2023 - Q1 2024)

	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024
 Mobile subscribers	2,152,591	2,299,208	2,328,750	2,415,715	2,449,728
 Mobile penetration	136%	146%	148%	153%	155%
 Mobile prepaid subscriptions	1,447,023	1,505,994	1,512,500	1,561,966	1,559,011
 Mobile postpaid subscriptions	705,172	792,832	816,250	853,748	890,717
 Average outgoing minutes from mobile (Domestic & Inter.)	160	152	136	140	125
 Fixed telephony subscriptions	216,678	215,233	214,355	211,474	209,628
 Fixed telephony penetration (Excluding ISDN)	13.7%	13.6%	13.6%	13.4%	13.3%
 Domestic monthly average minutes per line*	59	56	55	56	53
 International outgoing minutes (Mobile)	217,124,126	215,140,781	191,292,046	185,562,210	173,367,504
 International outgoing minutes (Fixed telephony)	2,321,273	1,741,692	1,556,065	1,427,326	1,329,043
 Mobile broadband subscriptions	2,304,132	2,332,985	2,314,646	2,317,171	2,375,854
 Mobile broadband penetration rate	146.1%	143%	143.2%	147%	151%
 Fiber broadband subscriptions	167,434	167,948	168,560	169,350	169,709
 Fiber broadband penetration per household**	59%	59%	59%	59%	60%
 Total data usage (Petabyte)	431	443	474	474	475
 Average total data usage per month per subscription	62	66	63	64	62

*An operator restated for the year 2022-2023.

**Fiber Broadband penetration is based on the latest available number of households provided by IGA in 2024.

Main Telecom Market Indicators for Q1 2024



Mobile subscribers: **2,449,728**

Penetration: **155%**

Average Int. & Domestic minutes per month per mobile subscription: **125**

Average data usage per mobile broadband subscription*: **25**

Fixed telephony subscriptions (Exclud. ISDN): **209,628**

Penetration: **13.3%**

Fixed Wired Telephony subscriptions **95%**

Fixed Wireless Telephony subscriptions: **5%**

Mobile Broadband subscriptions: **2,375,854**

Mobile Broadband penetration rate: **151%**

Fiber Broadband subscriptions: **177,976**

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



Mobile Prepaid subscriptions: **1,559,011**

Mobile postpaid subscriptions: **890,717**

% of prepaid out of Mobile market subscriptions: **64%**

% of postpaid out of Mobile market subscriptions : **36%**

Domestic monthly average minutes per line: **53**

International Outgoing Minutes (Mobile): **173,367,504**

International Outgoing Minutes (Fixed telephony): **1,329,043**



Total Data Usage: **475 Petabyte**

Fiber Broadband Traffic: **250 Petabyte**

Avg. Traffic per broadband subscription per month: **62 GB**

Avg. Fiber Broadband Traffic per month: **475 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 Q1 2024)

2,449,728 Subscriptions

155% Penetration rate

Q1 2023

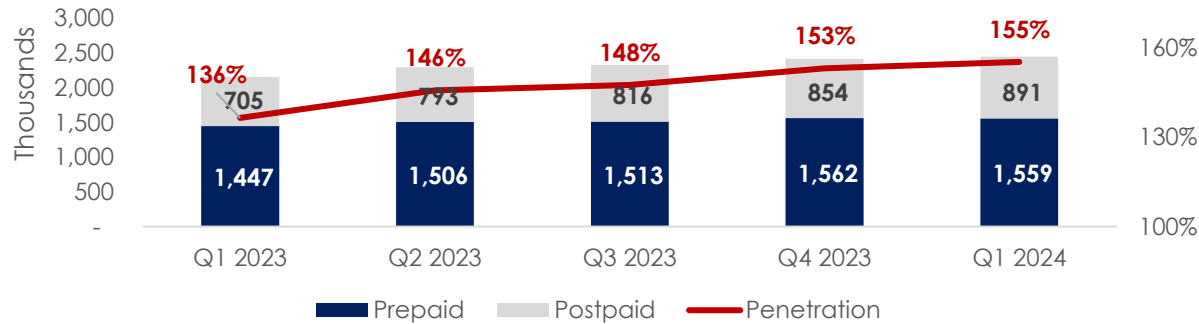
2,152,591

Q1 2024

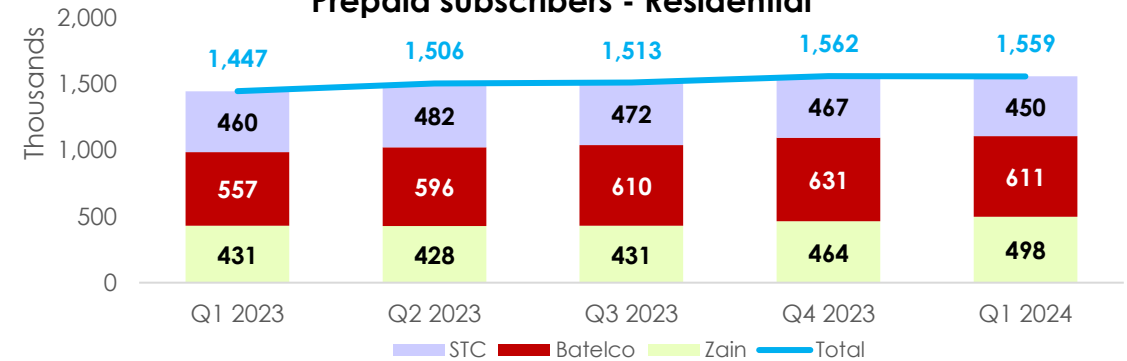
2,449,728

14%

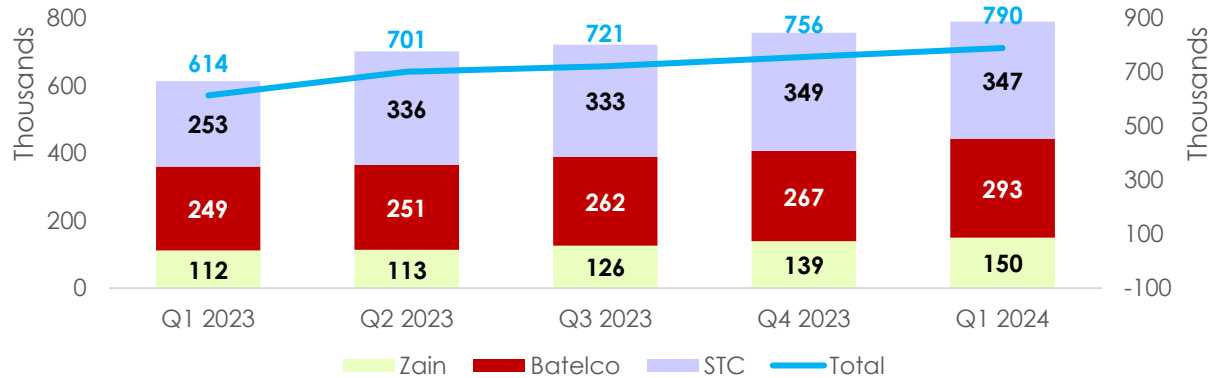
Number of Mobile Subscriptions & Penetration



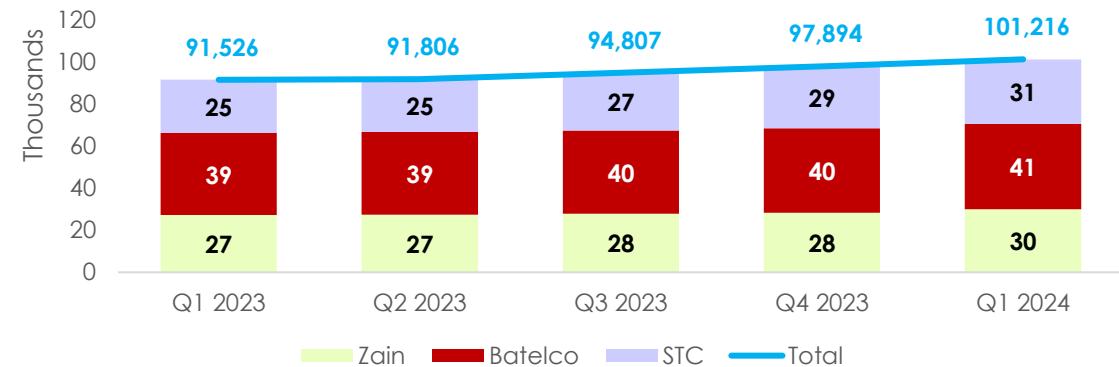
Prepaid subscribers - Residential**



Postpaid subscribers - Residential



Postpaid subscribers - Non Residential



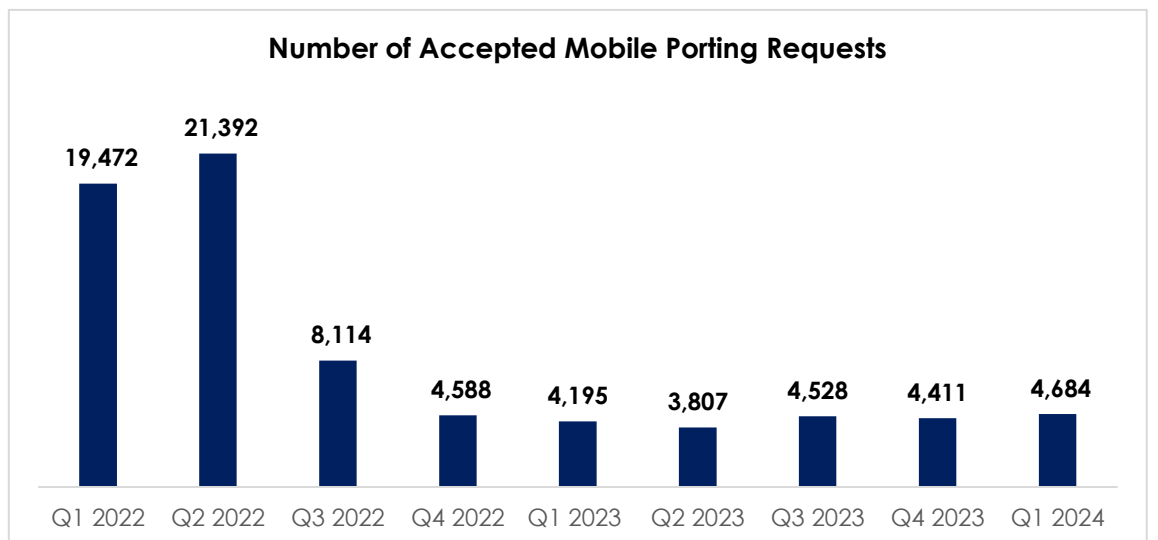
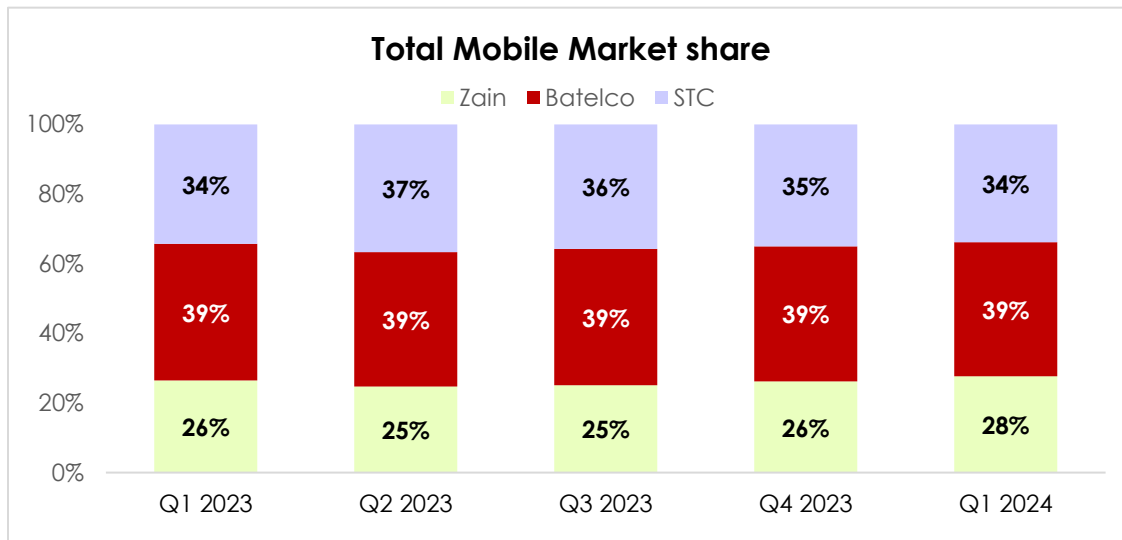
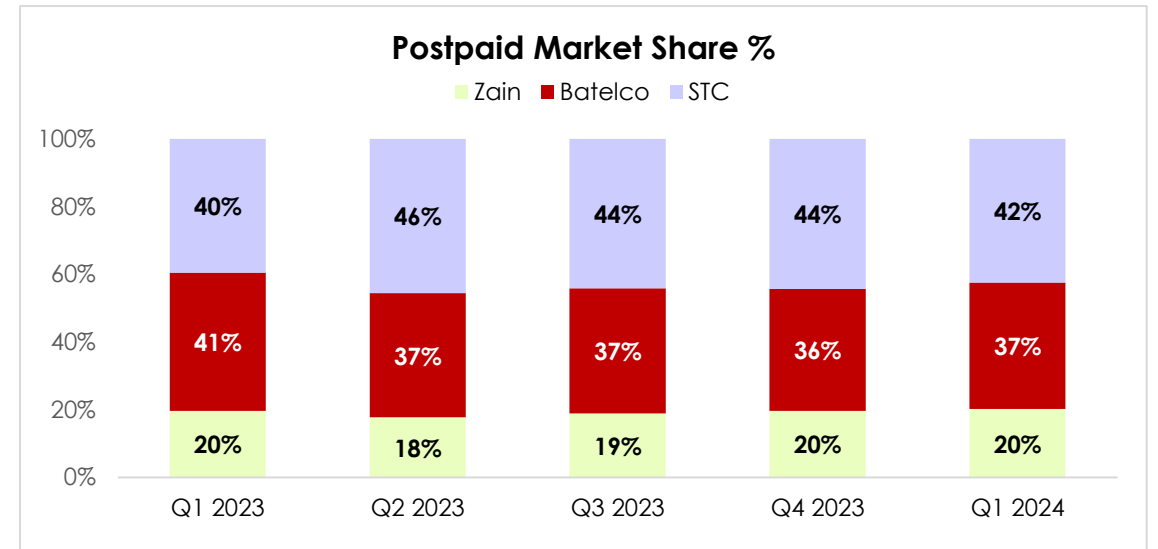
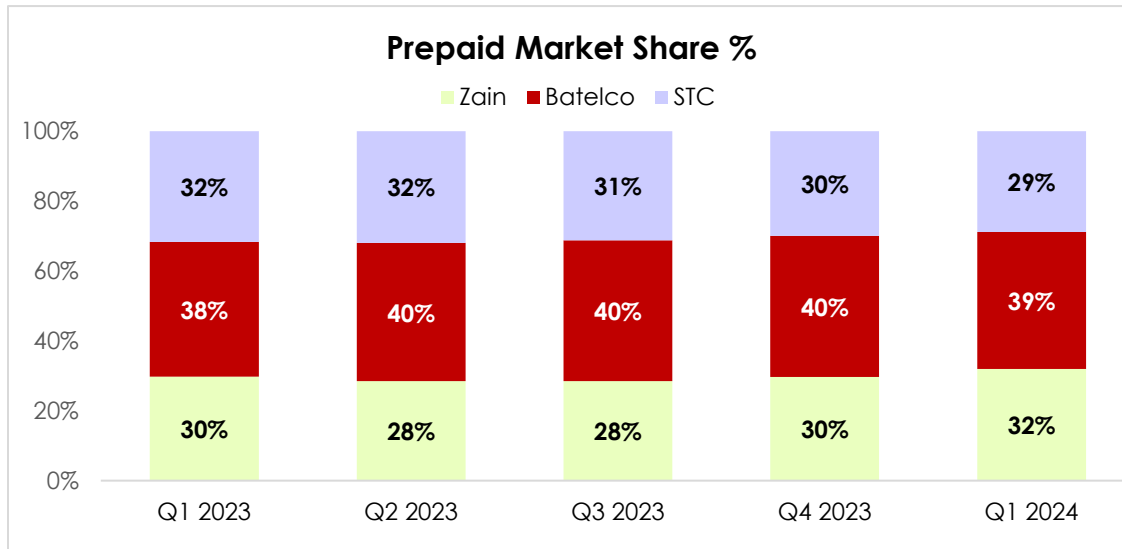
Population***	2021	2022	2023	2024
By IGA	1,504,365	1,565,000	1,577,059	1,577,059

* Data for Prepaid Non-residential subscribers not yet available for all 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>

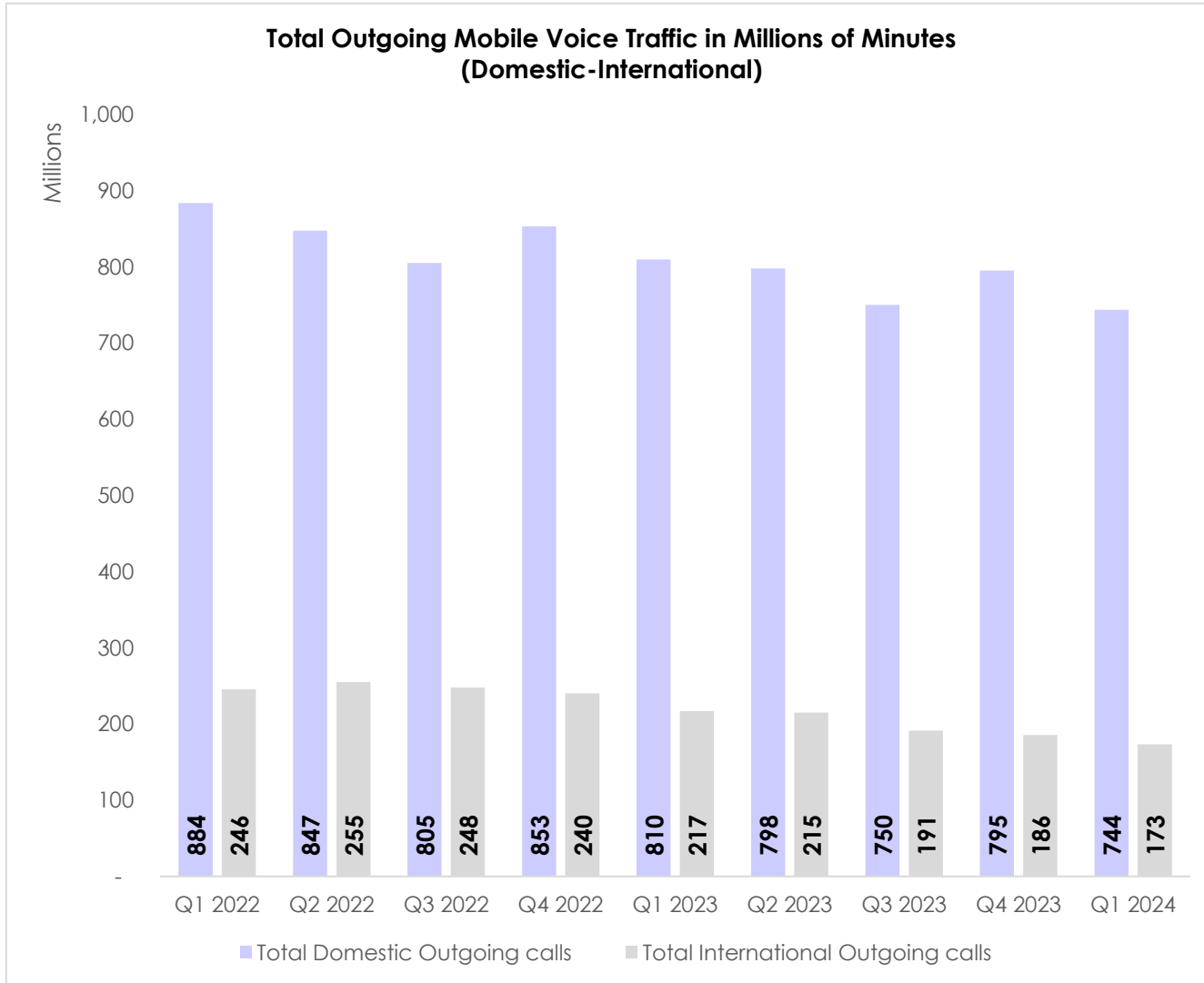
Mobile services: Subscriptions (2/2)



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

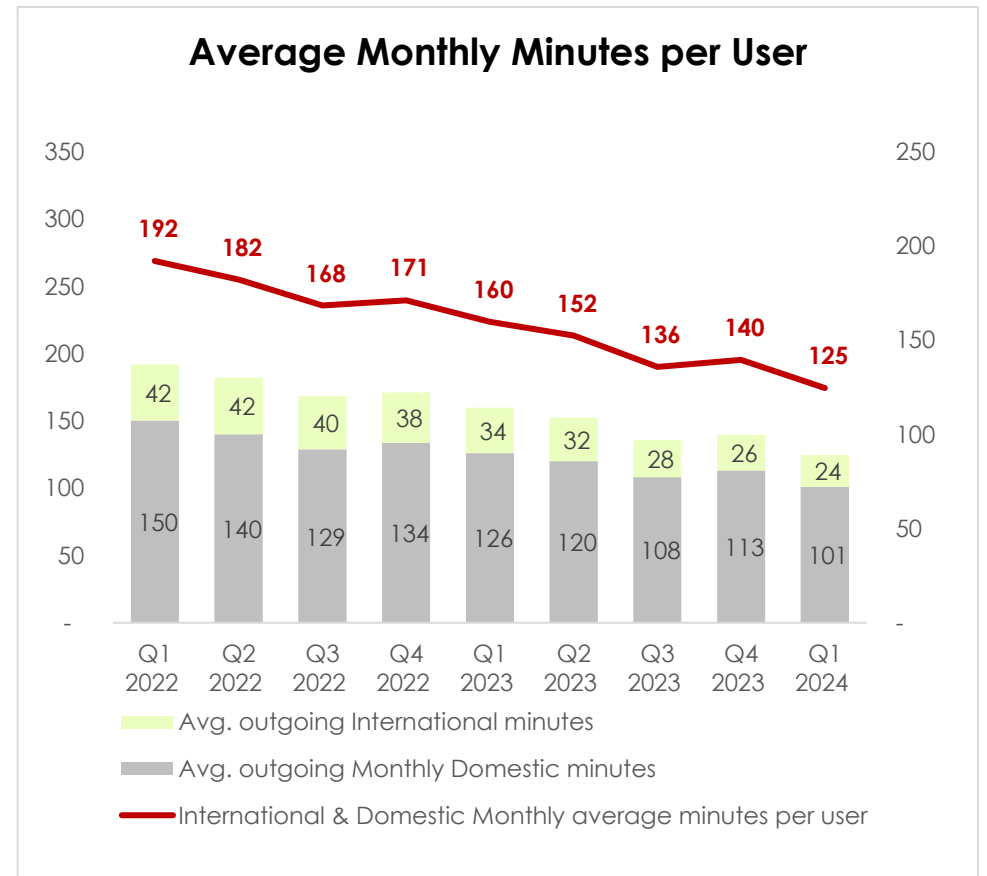


Total Outgoing Traffic in Minutes (Domestic + International)*

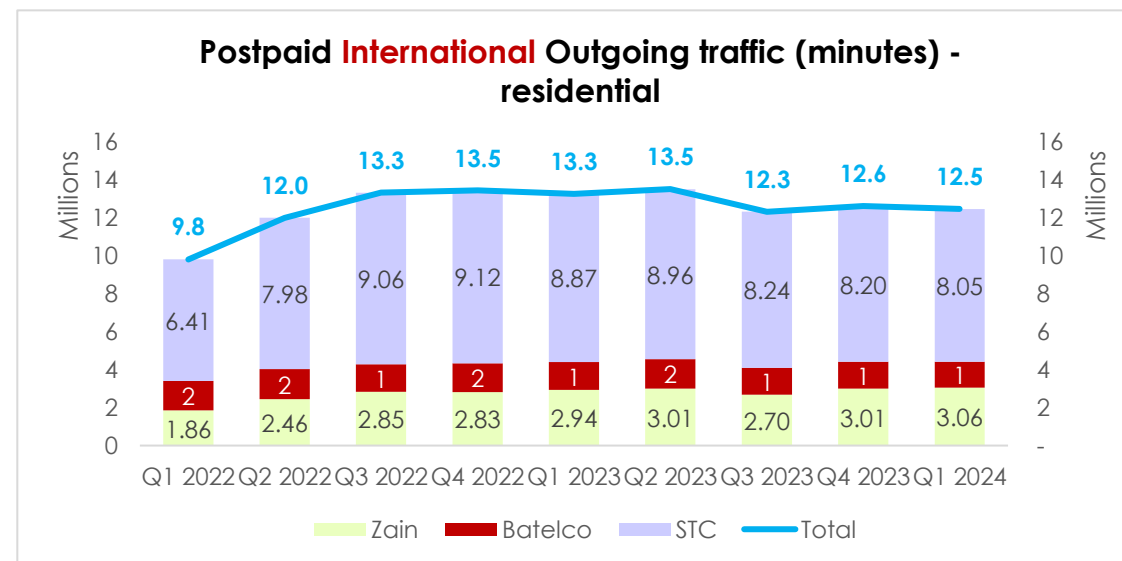
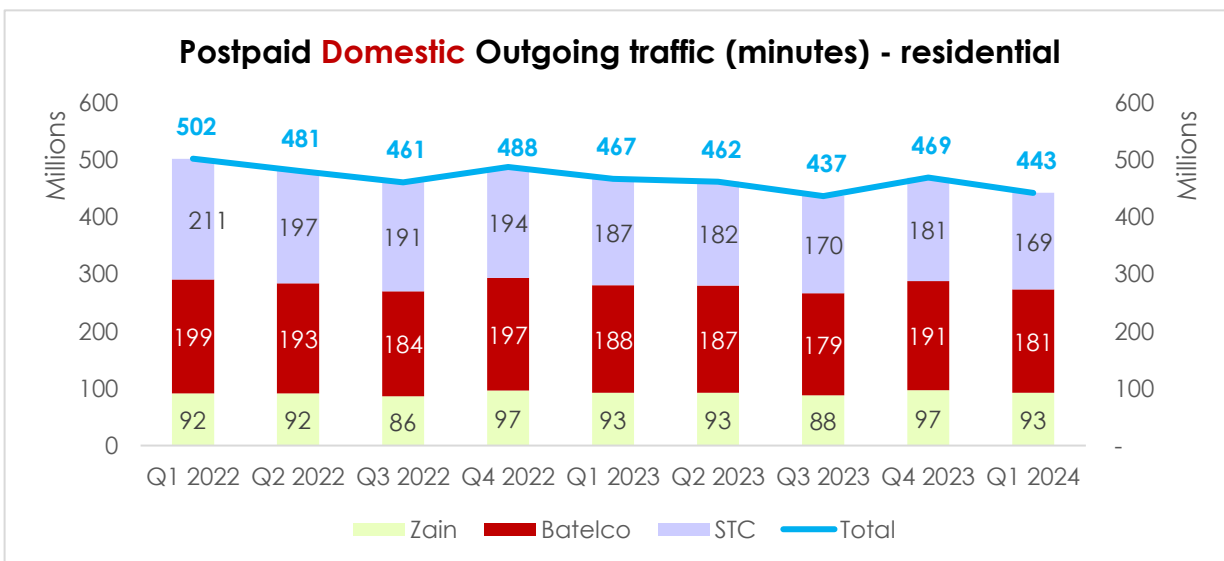
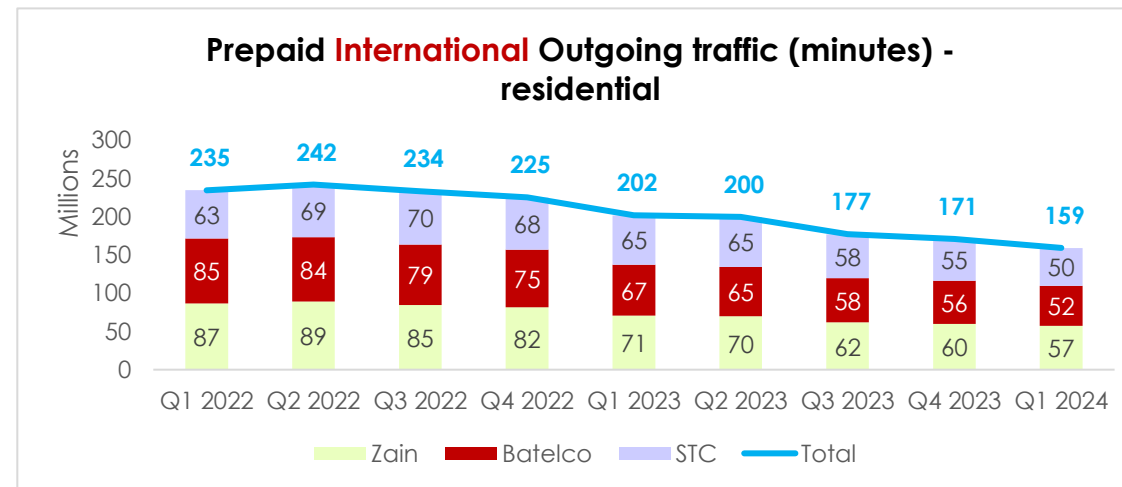
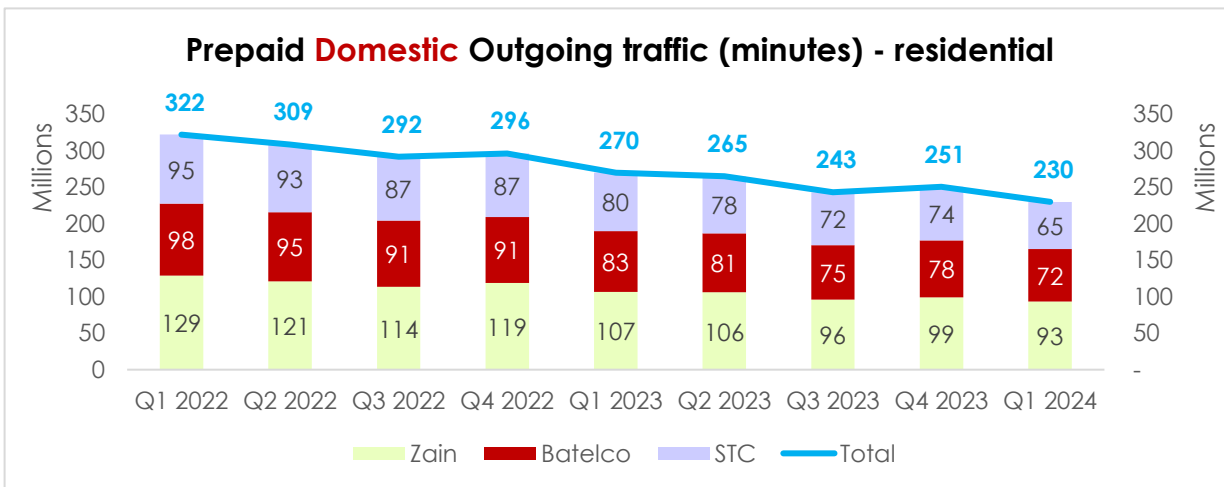


Q1 2023	Q1 2024
1,027,007,648	916,898,384

▼ **11%**



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

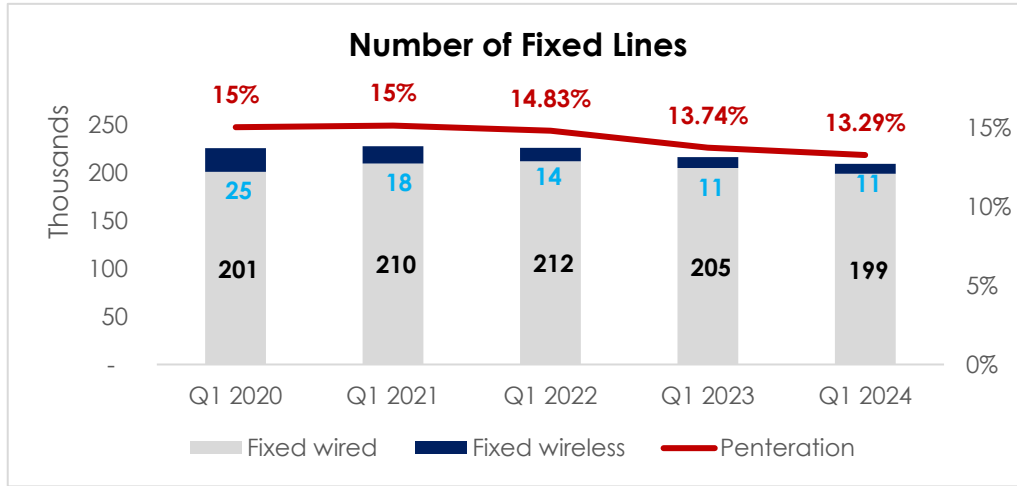


* Historical data for Non-residential (Domestic & Intl.) Traffic is currently unavailable.

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

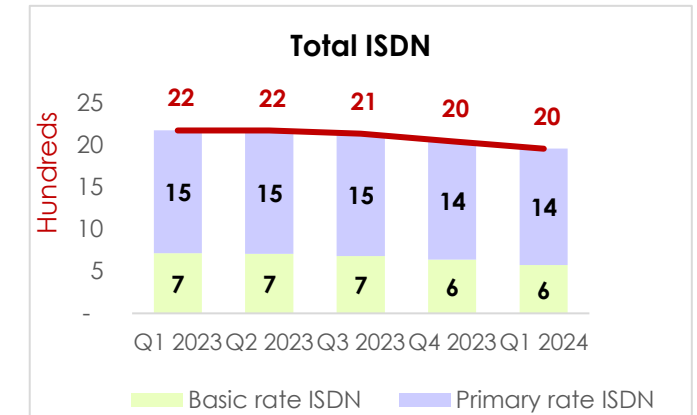
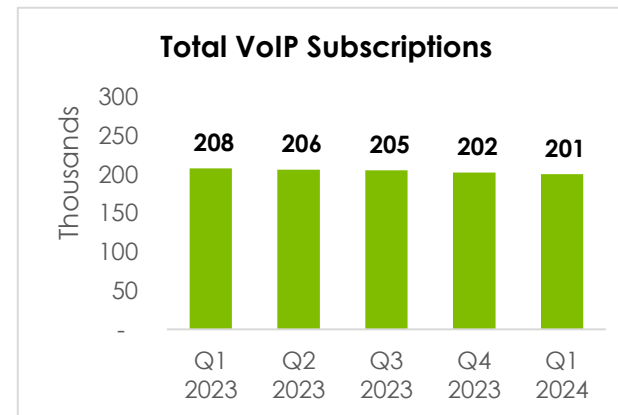
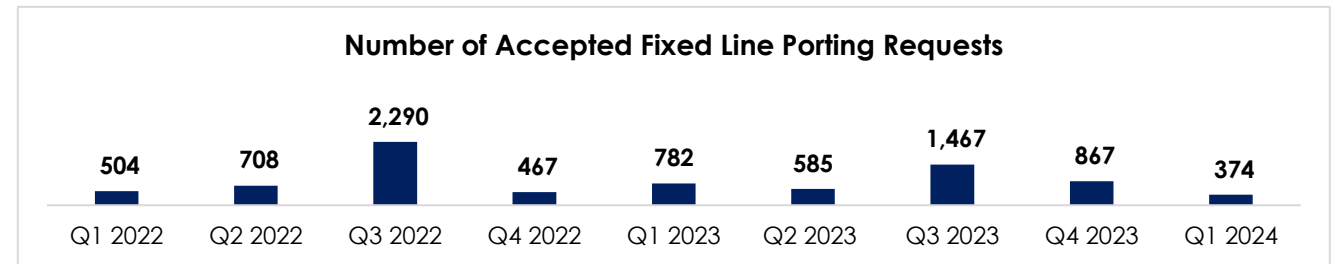
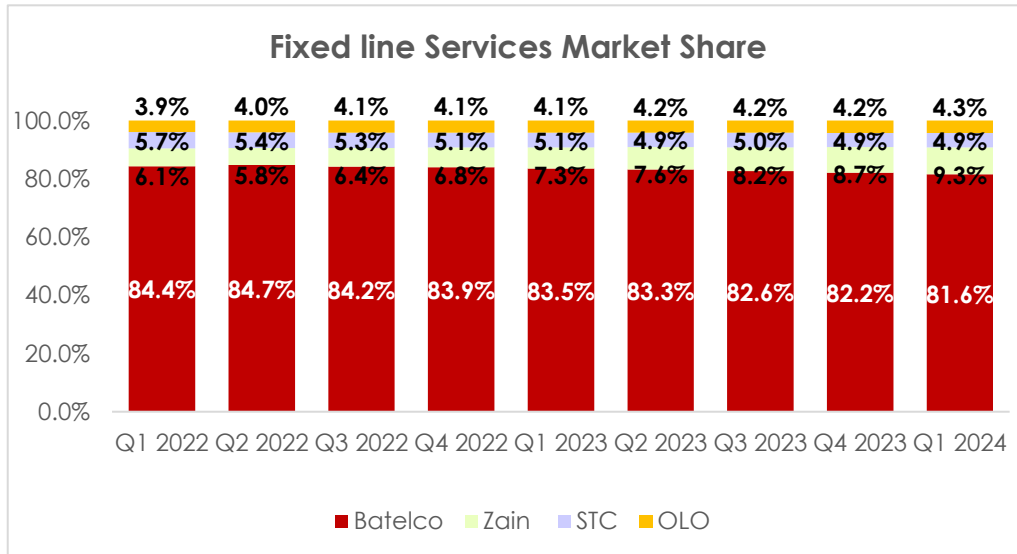


No. of fixed telephony subscriptions
(Excluding ISDN)



End of Q1 2023	End of Q1 2024
216,678	209,628
13.7% Penetration rate	13.3% Penetration rate

	2020	2021	2022	Q4 2023	Q1 2024
	228,121	227,133	217,077	211,474	209,628
% of Fixed Wired	92%	93%	95%	95%	95%
% of Fixed Wireless	8%	7%	5%	5%	5%



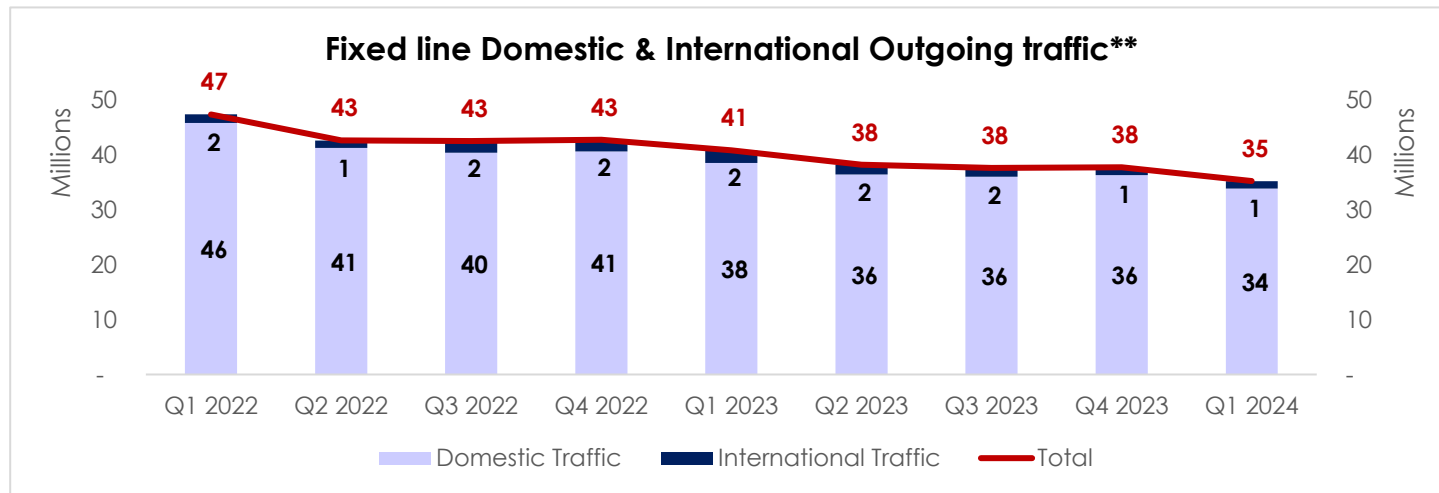
* Includes VoIP as of 2021 but excludes ISDN.

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

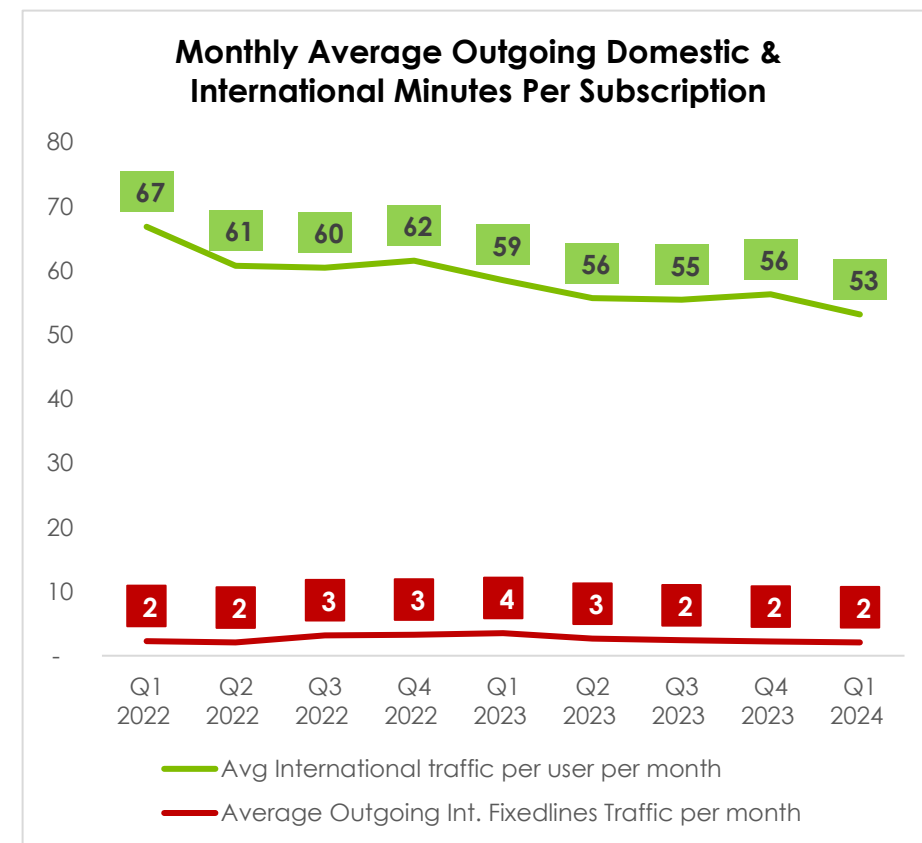
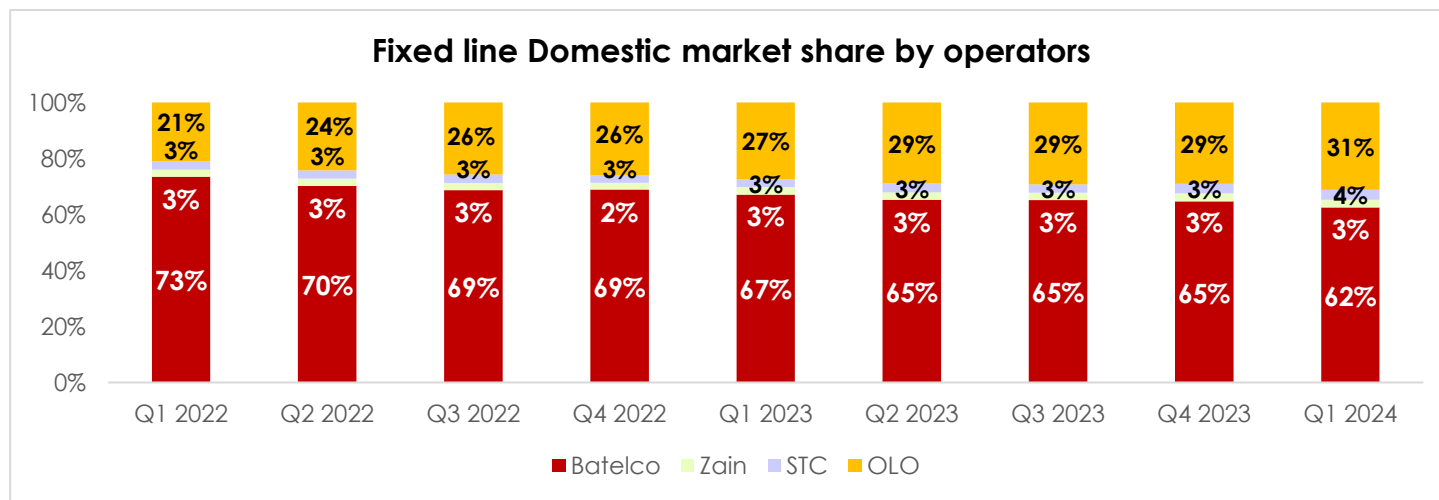
Fixed telephony services: Traffic (PSTN & Wireless - Minutes)*



Total fixed domestic outgoing traffic in minutes**



Q1 2023	Q1 2024
38,490,265	33,885,877



* Includes VoIP and ISDN traffic.

Broadband services: Subscriptions* (1/2)



No. of broadband subscriptions (End of Q1 2024)

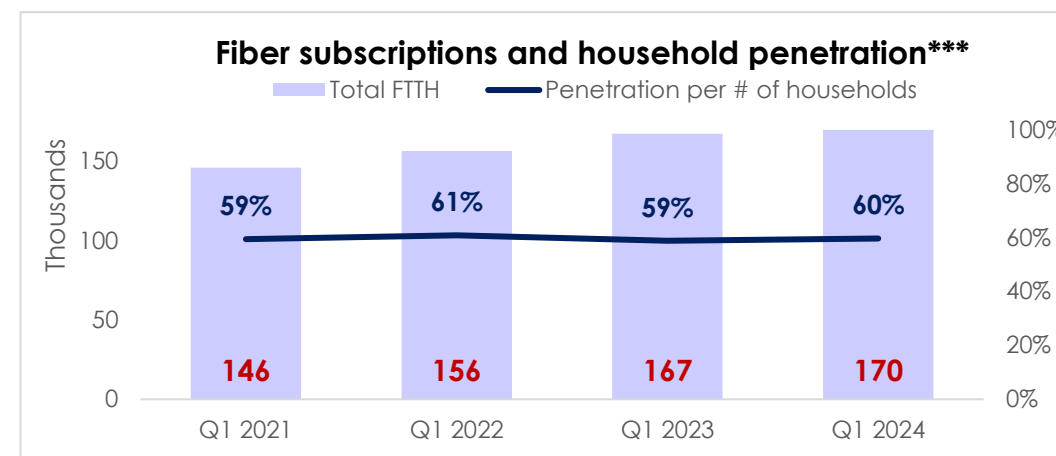
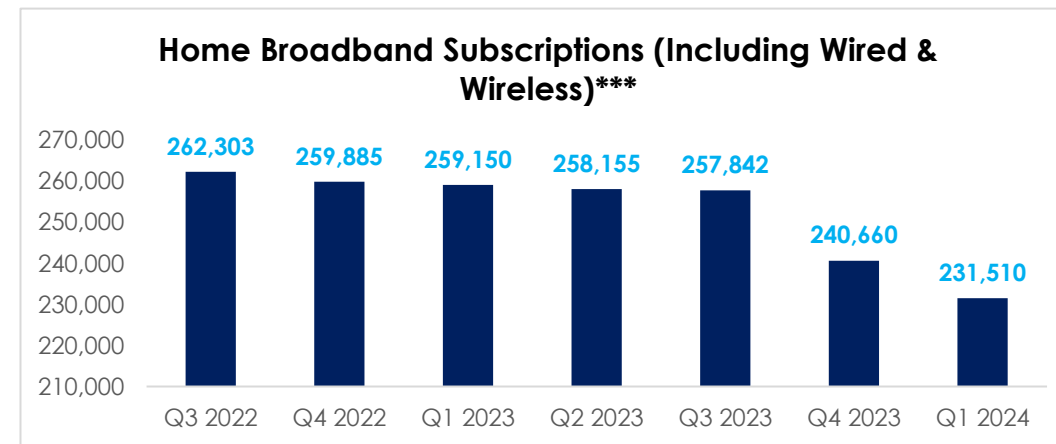
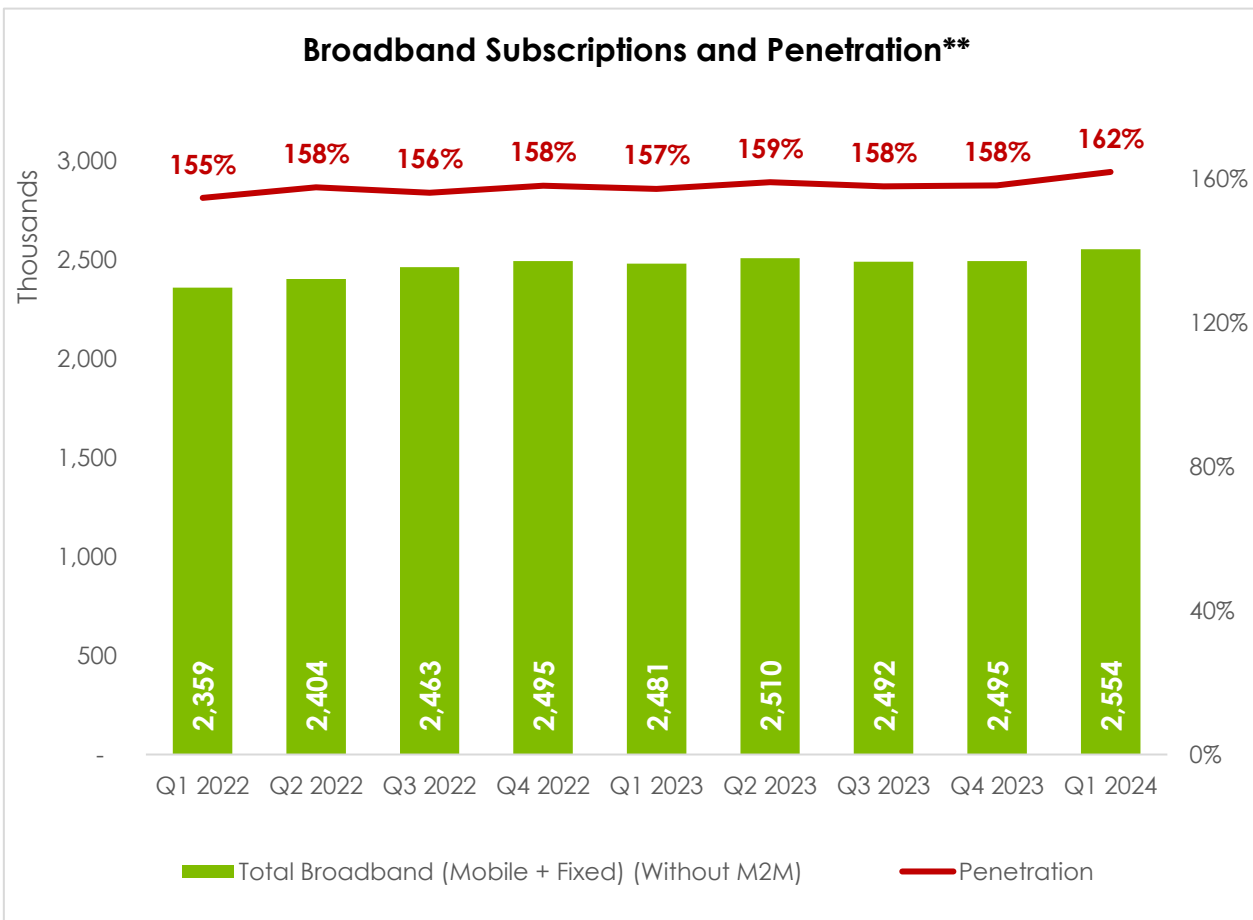
2,553,830

162% Penetration rate

Q1 2023
2,480,743

Q1 2024
2,553,830

▲
3%



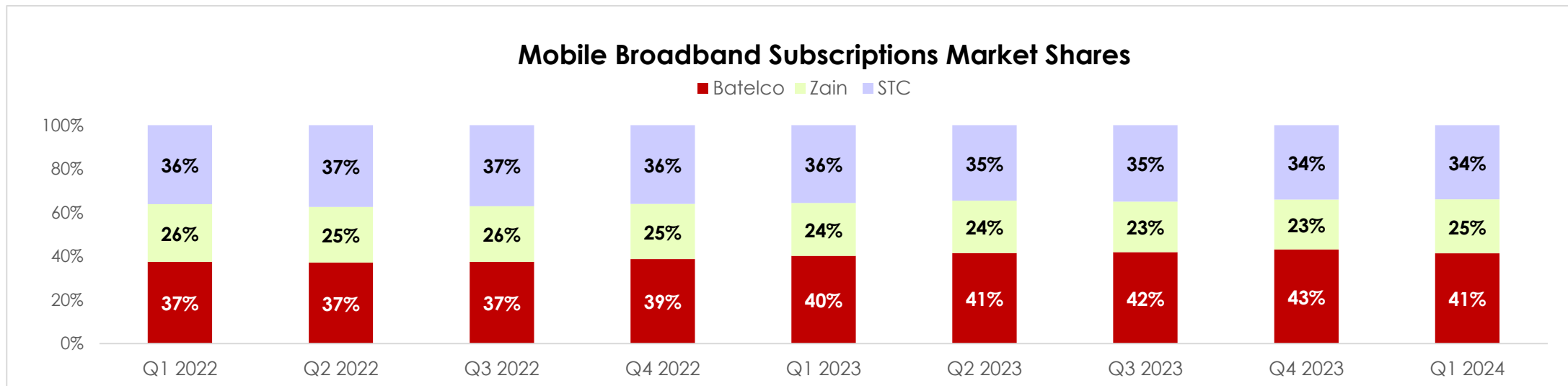
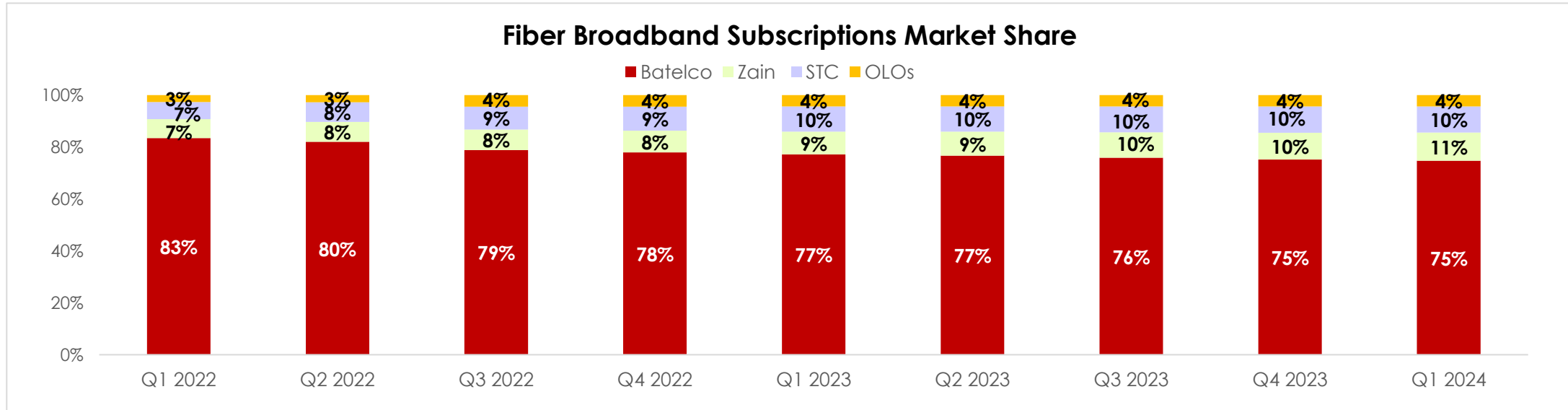
* Doesn't include M2M.

** Mobile broadband data is currently under review.

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

**** Number of households is based on the latest IGA data in 2024.

Broadband services: Subscriptions* (2/2)



Broadband services: Data Traffic 1 of 2



Total data traffic in Gigabyte

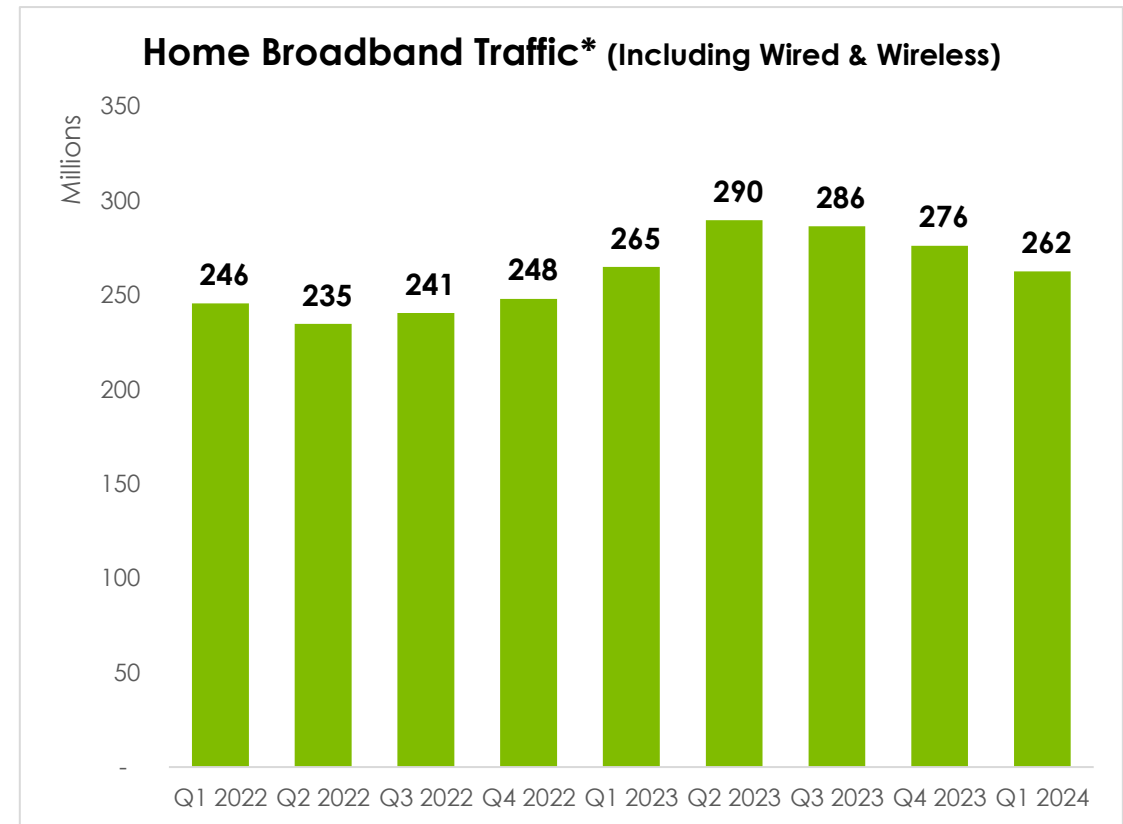
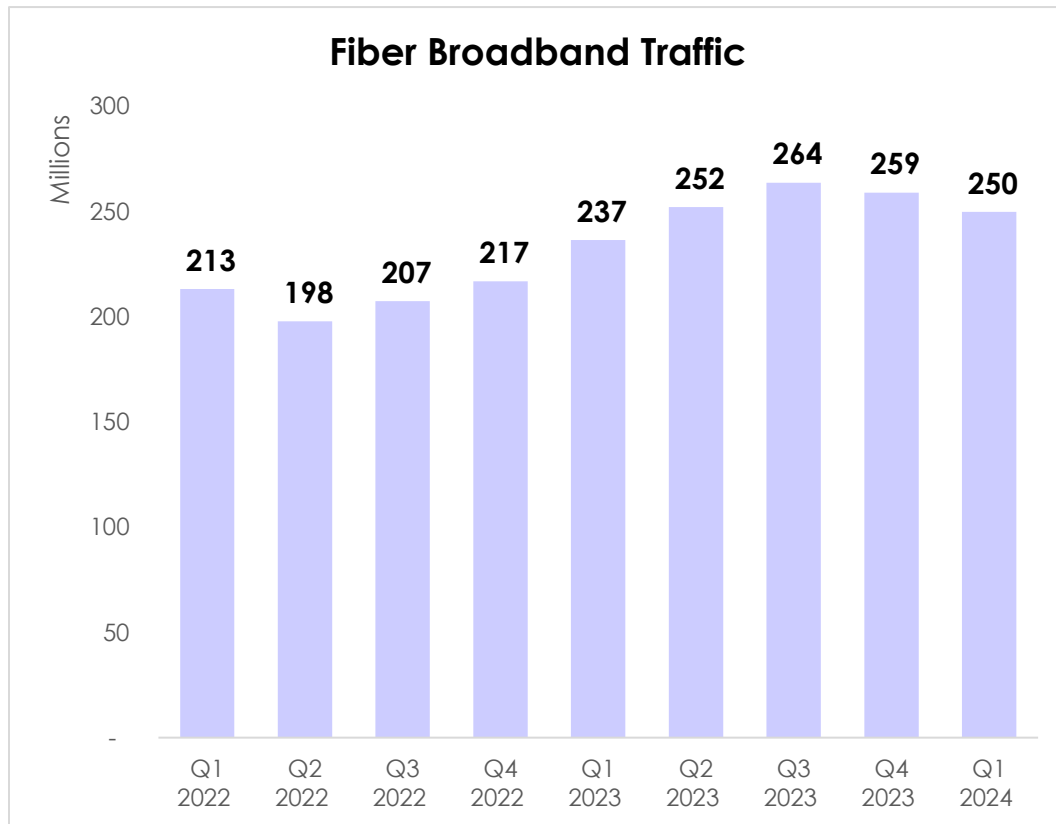
Q1 2023

431,149,791

Q1 2024

474,721,589

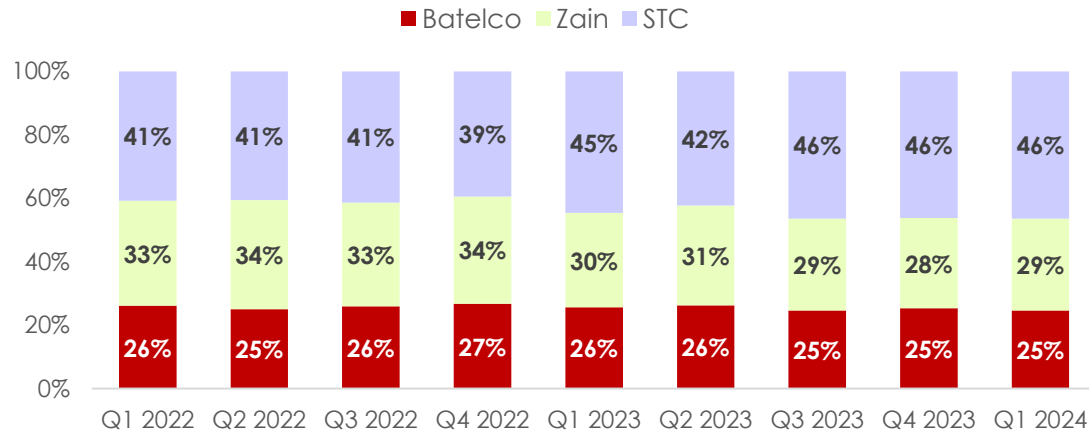
▲ 10%



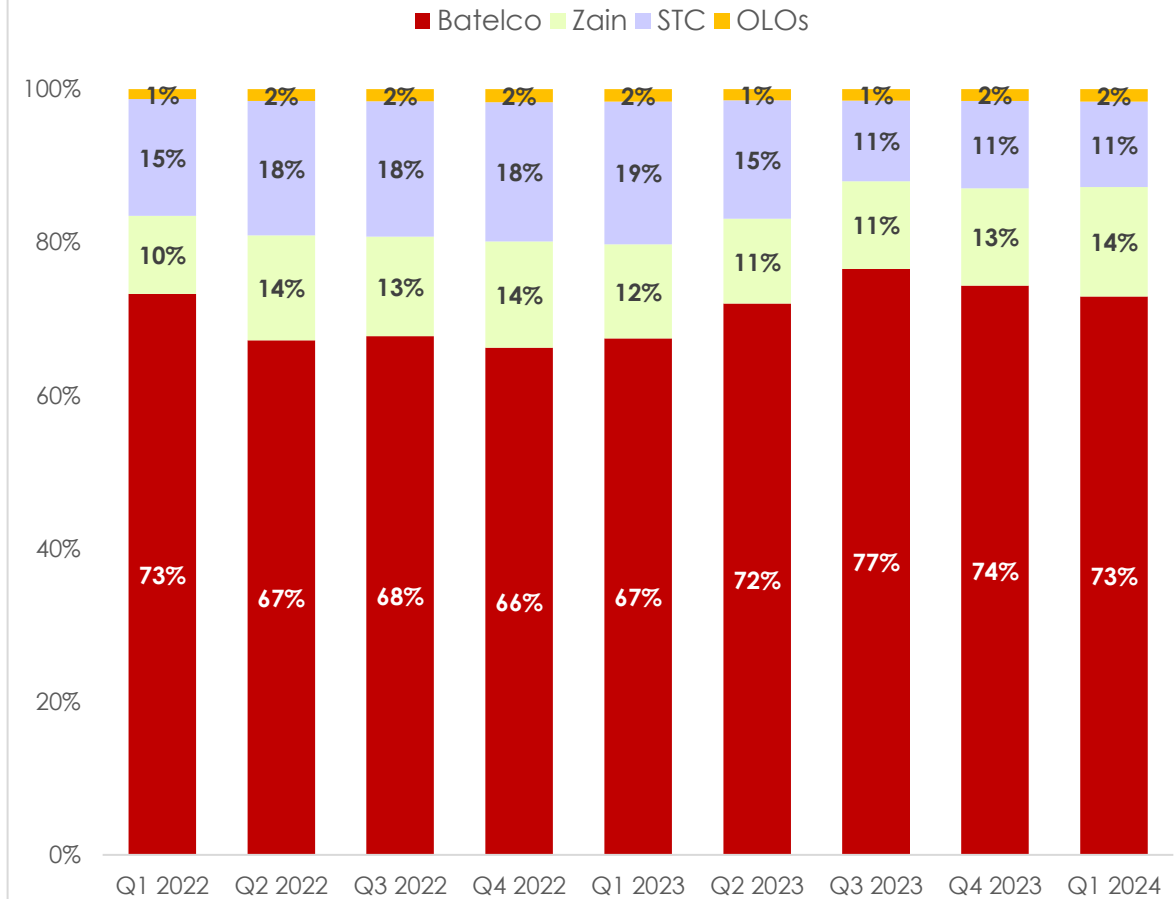
* Includes residential Fiber, Fixed Terrestrial and Mobile Home BB.

Broadband services: Data Traffic 2 of 2

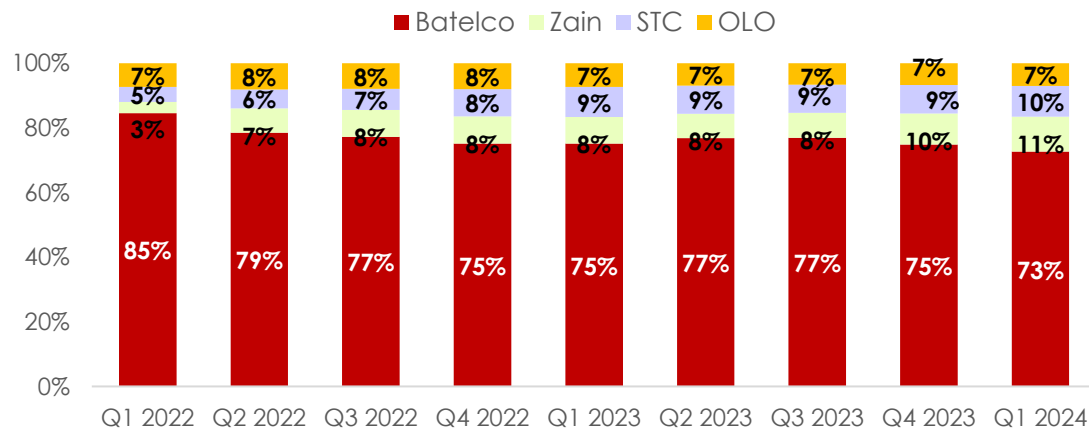
Mobile Broadband Traffic Market Share



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

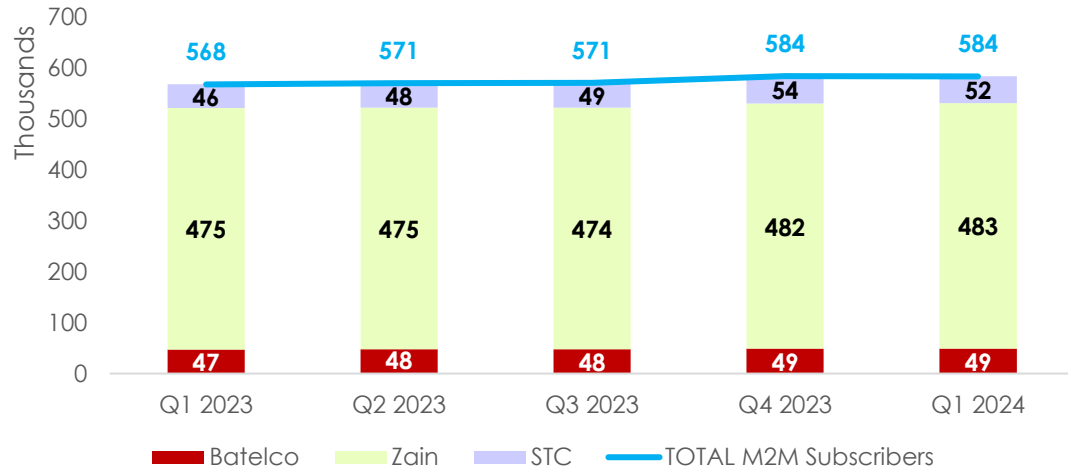


Fiber Broadband Traffic Market Share

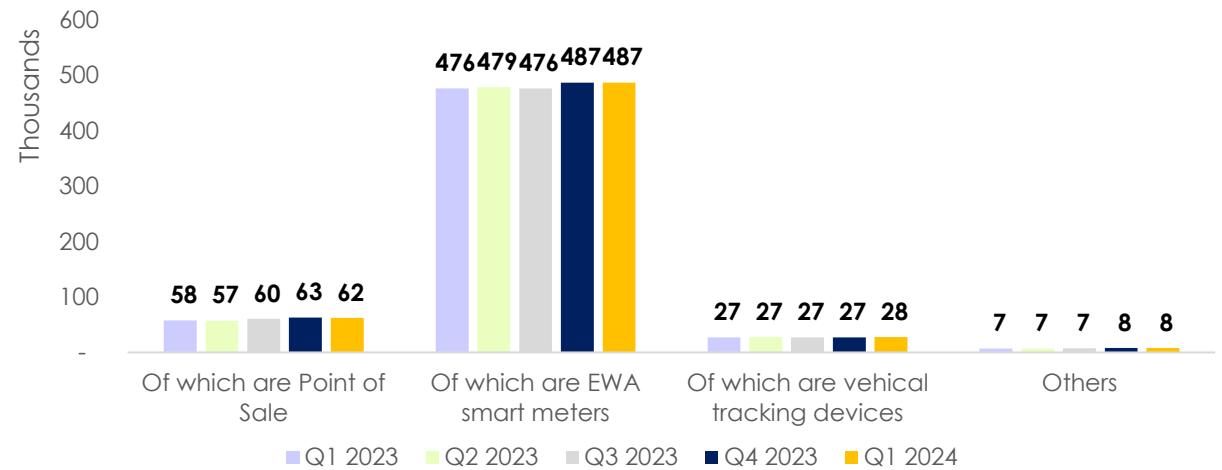


M2M Subscribers & Traffic

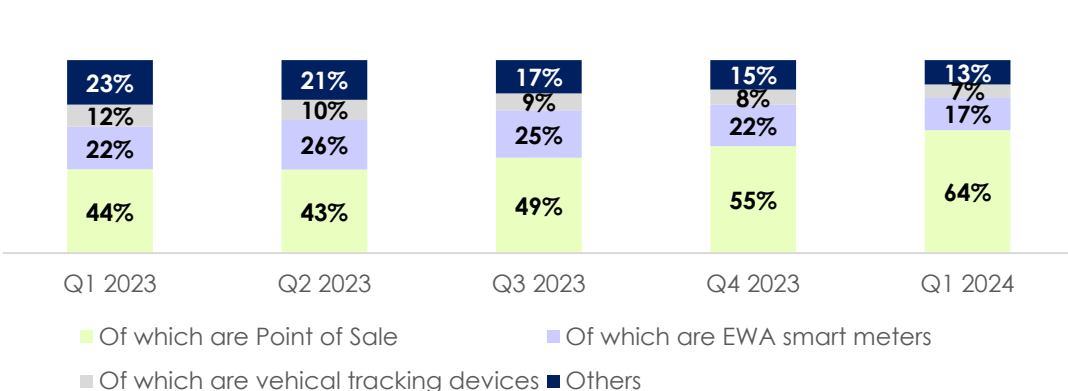
M2M Subscribers (Thousands)



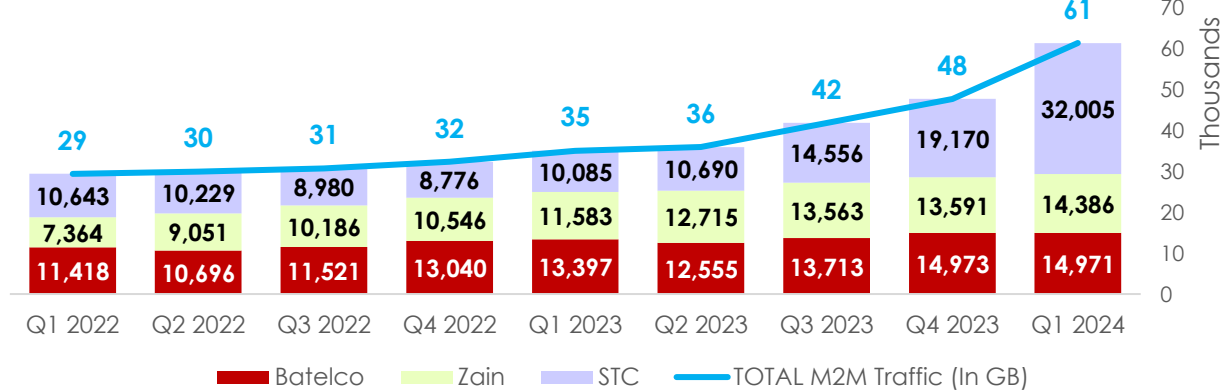
M2M Subscribers by type



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*				
	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024
Batelco	556,874	595,732	609,640	630,755	610,892	N/A	N/A	N/A	N/A	N/A
Zain	430,642	427,940	430,924	463,812	497,767	396	382	N/A	N/A	N/A
STC	459,507	482,322	471,936	467,399	450,349	N/A	N/A	N/A	1	3
Total	1,447,023	1,505,994	1,512,500	1,561,966	1,559,008	396	382	0	1	3
Postpaid <u>residential</u> subscribers						Postpaid <u>non-residential</u> subscribers				
	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024
Batelco	248,746	251,457	262,205	267,218	292,698	39,100	39,328	39,561	40,252	40,597
Zain	111,551	113,295	126,083	139,471	149,593	27,145	27,386	27,784	28,240	29,900
STC	253,349	336,274	333,155	349,165	347,210	25,281	25,092	27,462	29,402	30,719
Total	613,646	701,026	721,443	755,854	789,501	91,526	91,806	94,807	97,894	101,216

*An operator amended their reporting of prepaid non-residential subscribers starting Q3 2023.

Fixed line subscriptions – raw data

Fixed line subscriptions – PSTN & VoIP (residential)

	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024
Batelco	127,599	126,485	125,047	122,374	121,662
Zain	14,189	14,771	15,673	16,467	17,235
STC	7,972	7,768	7,850	7,298	7,105

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

Batelco	53,386	52,710	52,065	51,369	49,347
Zain	1,555	1,673	1,825	1,944	2,177
STC	2,991	2,840	2,909	3,036	3,116
OLOs*	8,986	8,986	8,986	8,986	8,986
Total**	216,687	215,158	214,355	211,474	209,628

* Includes residential & non-residential

** Excluding ISDN.

	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024
Basic-rate ISDN	715	705	680	636	574
Primary-rate ISDN	1,459	1,468	1,455	1,408	1,382
Total	2,174	2,173	2,135	2,044	1,956

Fiber Broadband subscriptions – raw data

Fiber Broadband subscriptions – (residential)

	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024
Batelco	128,105	127,787	126,908	126,394	125,958
Zain	13,511	14,115	14,901	15,711	16,502
STC	14,078	14,022	14,162	14,466*	13,976
OLOs	5,354	5,354	5,354	5,354	5,354
Total	161,048	161,278	161,205	161,925	161,790

Fiber Broadband subscriptions – (non-residential)

	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024
Batelco	1,320	1,336	1,341	1,214	1,165
Zain	1,328	1,445	1,596	1,723	1,963
STC	1,737	1,888	2,297	2,487	2,790
OLOs	2,001	2,001	2,001	2,001	2,001
Total	6,386	6,670	7,235	7,424	7,919
GRAND TOTAL	167,434	167,948	168,560	169,350	169,709

*STC figures amended for Q3-Q4 .

Total Mobile Broadband subscriptions* – raw data

Mobile Broadband subscriptions – (Prepaid)

	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024
Batelco	556,874	595,732	609,640	630,755	610,892
Zain	373,068	368,482	349,554	344,437	368,943
STC	372,646	351,684	364,645	368,735	359,752

Mobile Broadband subscriptions – (Postpaid)

Batelco	367,401	371,006	358,302	366,998	369,968
Zain	188,251	190,491	187,256	185,787	218,848
STC	447,242	434,394	437,174	420,459***	447,451
Total**	2,304,132	2,332,985	2,314,646	2,317,171	2,375,854

* 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.