

Quarterly Market Indicators Report

Q2 2023

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Main Telecom Market Indicators (Q2 2022- Q2 2023)

	Q2 2022	Q3 2022	Q4 2022	Q1 2023	Q2 2023
 Mobile subscribers	2,038,167	2,101,013	2,141,263	2,152,591	2,299,208
 Mobile penetration	130%	134%	137%	136%	146%
 Mobile prepaid subscriptions	1,381,766	1,429,680	1,443,024	1,447,419	1,506,376
 Mobile postpaid subscriptions	656,401	671,333	698,239	705,172	792,832
 Average outgoing minutes from mobile (Domestic & Inter.)	182	168	171	160	155
 Fixed telephony subscriptions	223,279	219,252	217,077	216,678	215,233
 Fixed telephony penetration (Excluding ISDN)	14.2%	14%	13.8%	13.7%	13.6%
 Domestic monthly average minutes per line**	57	57	58	55	52
 International outgoing minutes (Mobile)	255,307,019	247,953,561	240,338,321	217,124,126	215,140,781
 International outgoing minutes (Fixed telephony)	1,389,449	2,123,794	2,162,818	2,321,273	1,741,692
 Mobile broadband subscriptions	2,235,661	2,289,066	2,319,717	2,304,265	2,254,710
 Mobile broadband penetration rate	143%	146%	148%	146%	143%
 Fixed broadband subscriptions	168,953	174,840	175,776	177,403	177,485
 Fixed broadband penetration per household*	66%	68%	68%	69%	69%
 Total data usage (Petabyte)	373	389	401	417	440
 Average total data usage per month per subscription	52	52	54	56	62

*Fixed Broadband penetration is based on the latest available number of households provided by IGA. Number of households was last updated in 2022.

** An operator restated for the year 2022-2023.

Main Telecom Market Indicators for Q2 2023



Mobile subscribers: **2,299,208**
Penetration: **146%**

Average Int. & Domestic minutes per month per mobile subscription: **155**

Average data usage per mobile broadband subscription*: **13.3 GB**

Fixed telephony subscriptions (Exclud. ISDN): **215,233**

Penetration: **13.6%**

Fixed Wired Telephony subscriptions **95%**

Fixed Wireless Telephony subscriptions: **5%**

Mobile Broadband subscriptions: **2,255,360**

Mobile Broadband penetration rate: **143%**

Fixed Broadband subscriptions: **177,485**

Fixed Broadband penetration rate per household: **69%****



Mobile Prepaid subscriptions: **1,506,376**

Mobile postpaid subscriptions: **792,832**

% of prepaid out of Mobile market subscriptions: **66%**

% of postpaid out of Mobile market subscriptions : **34%**



Domestic monthly average minutes per line: **52**

International Outgoing Minutes (Mobile): **215,140,781**

International Outgoing Minutes (Fixed telephony): **1,741,692**

Total Data Usage: **440 Petabyte**

Fixed Broadband Traffic: **257 Petabyte**

Mobile Broadband Traffic: **183 Petabyte**

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

Avg. Fixed Broadband Traffic per month: **485 GB**

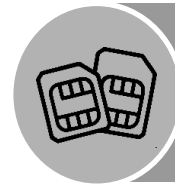
Avg. Mobile Broadband Traffic per month***: **28 GB**

* 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 Q2 2023)

2,299,208 Subscriptions

146% Penetration rate

Q2 2022

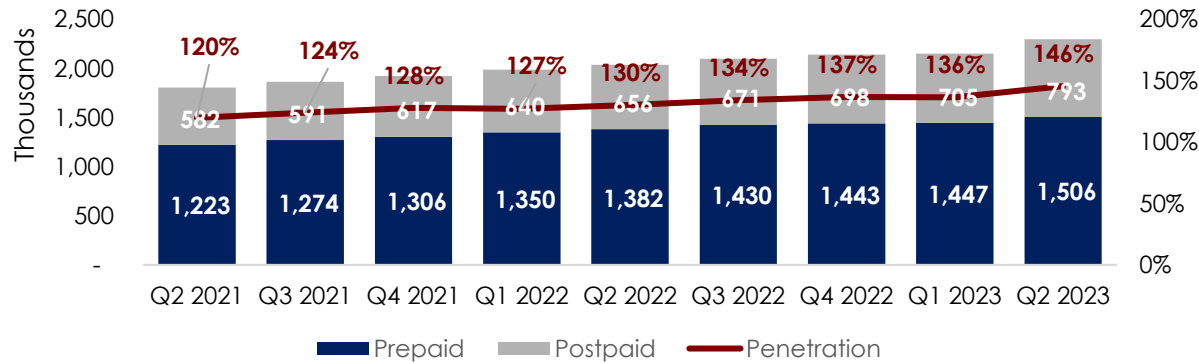
2,038,167

Q2 2023

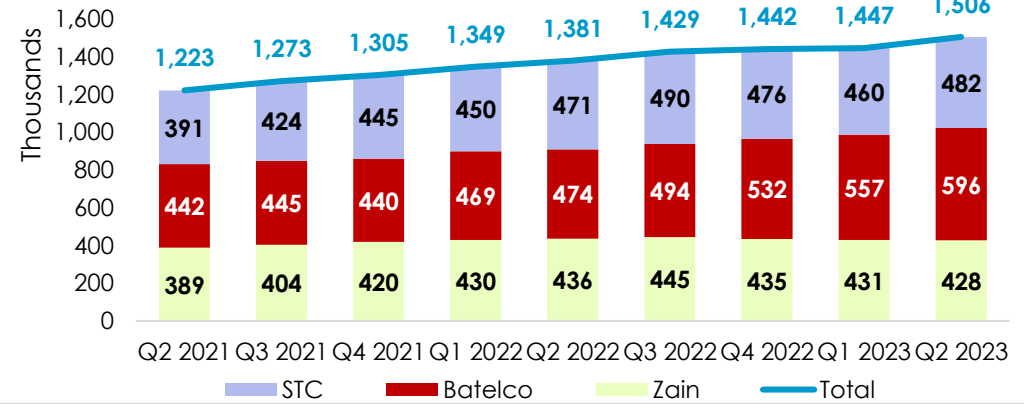
2,299,208

13%

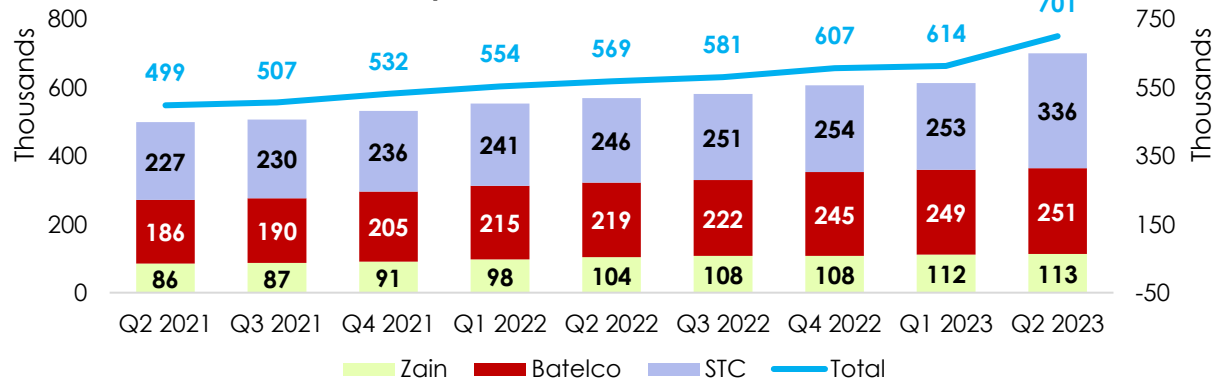
Number of Mobile Subscriptions & penetration



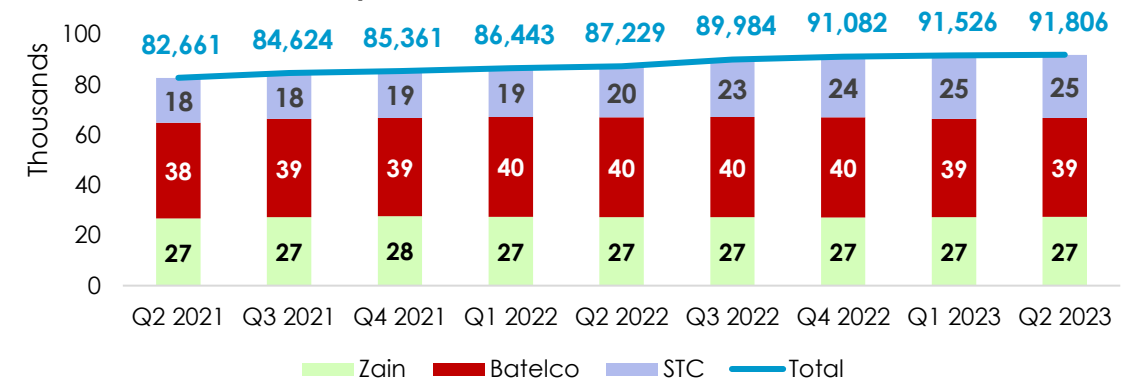
Prepaid subscribers - Residential**



Postpaid subscribers - Residential



Postpaid subscribers - Non Residential



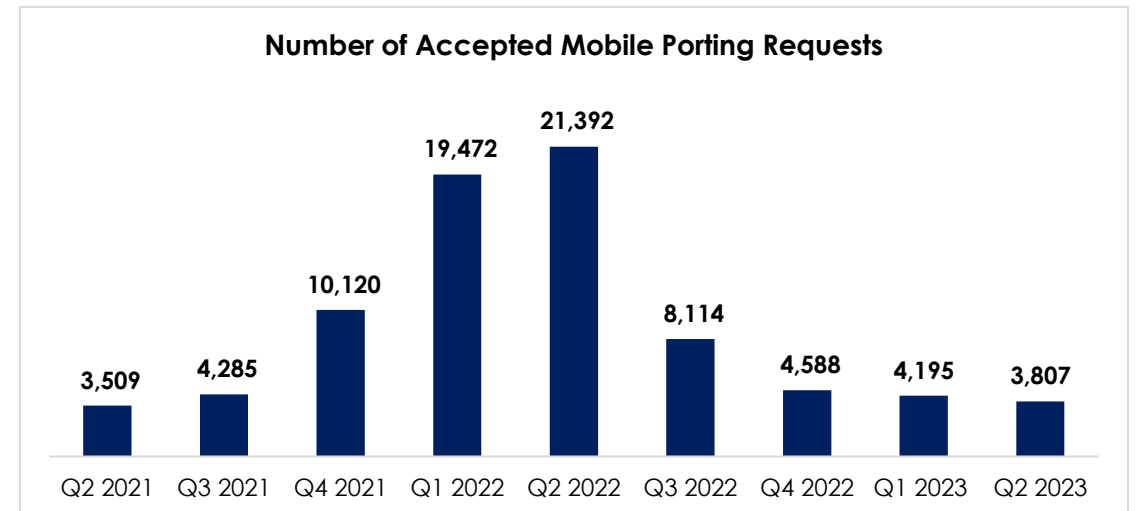
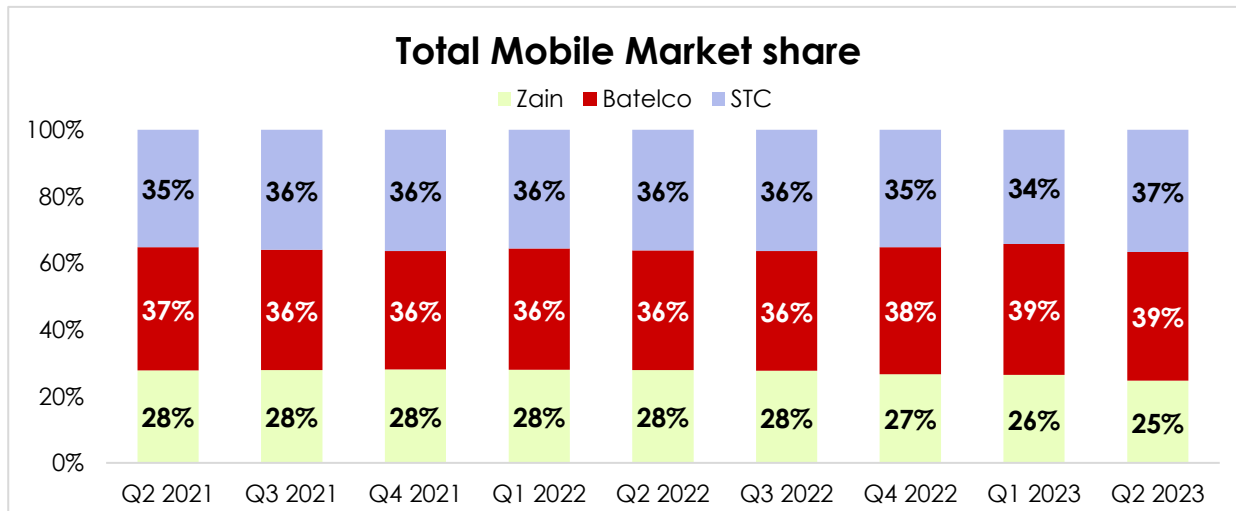
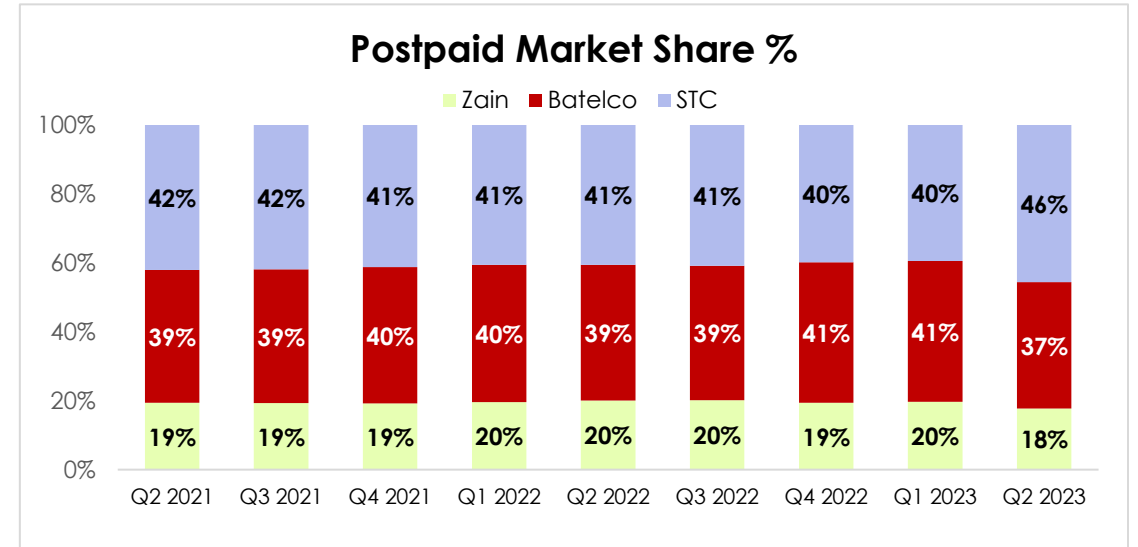
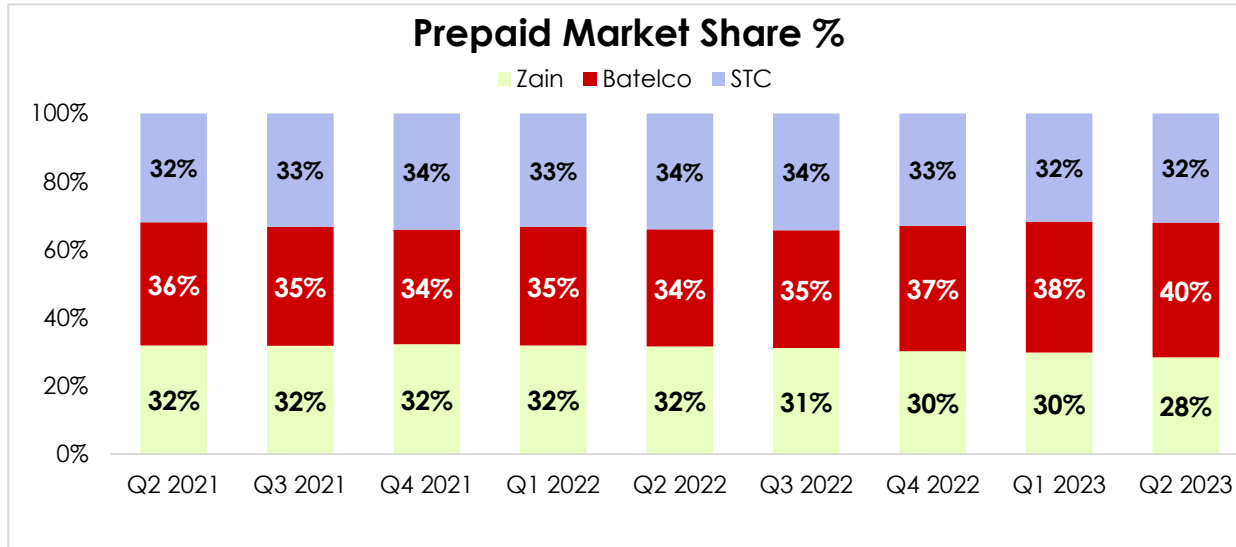
* Data for Prepaid Non-residential subscribers not yet available for 2/3 MNOs.

** 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=q8FmFJgiscL2fwlZON1%2BDIHlz%2BofVmjoI4F61CX7bmSQ%3D>

Population***	2020	2021	2022	2023
By IGA	1,472,204	1,504,365	1,565,000	1,577,059

Mobile services: Subscriptions (2/2)



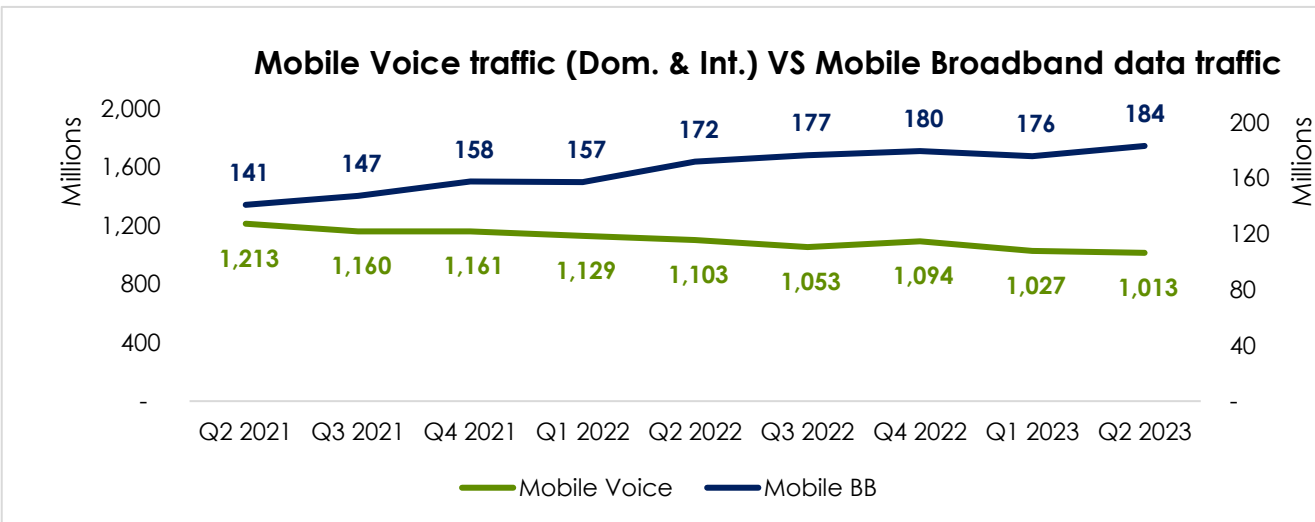
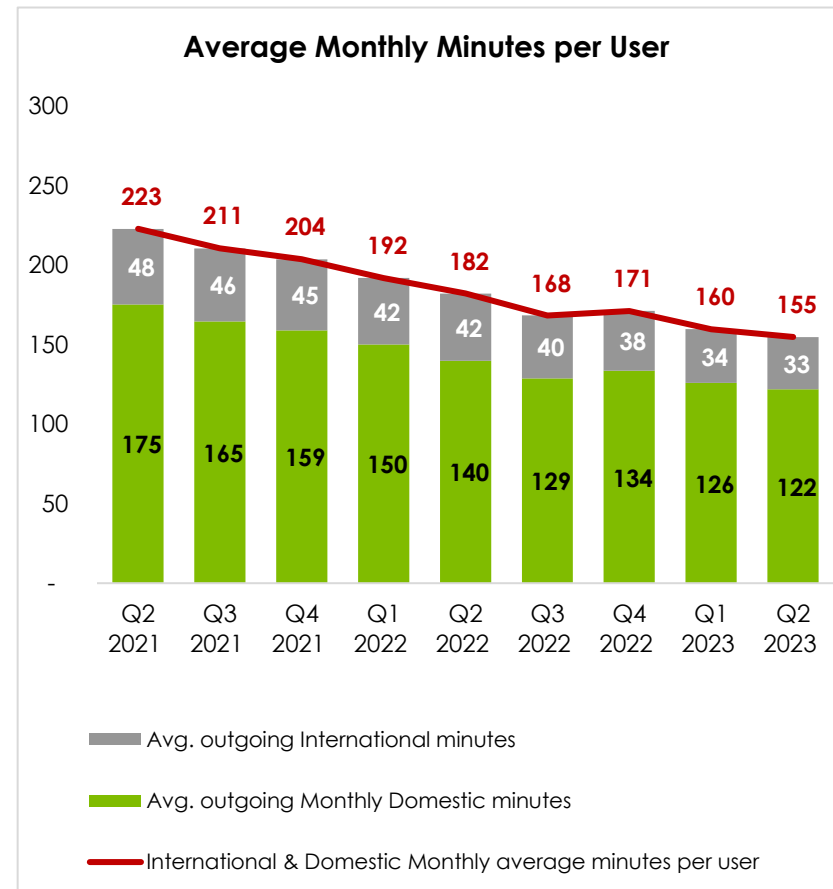
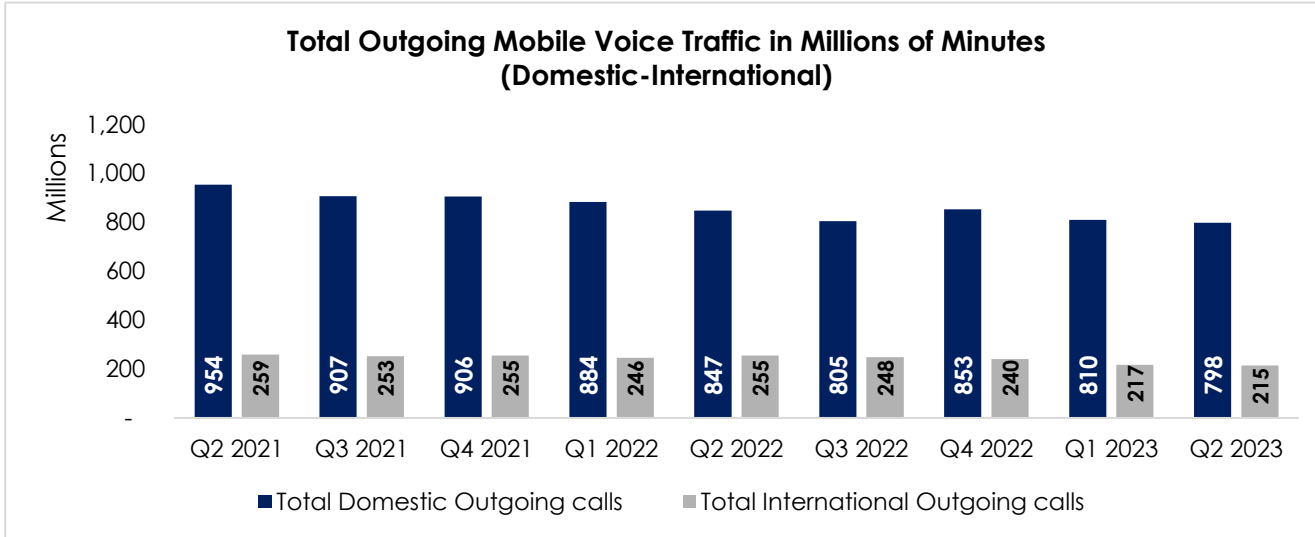
Mobile services: Traffic* (Minutes) (1/2)



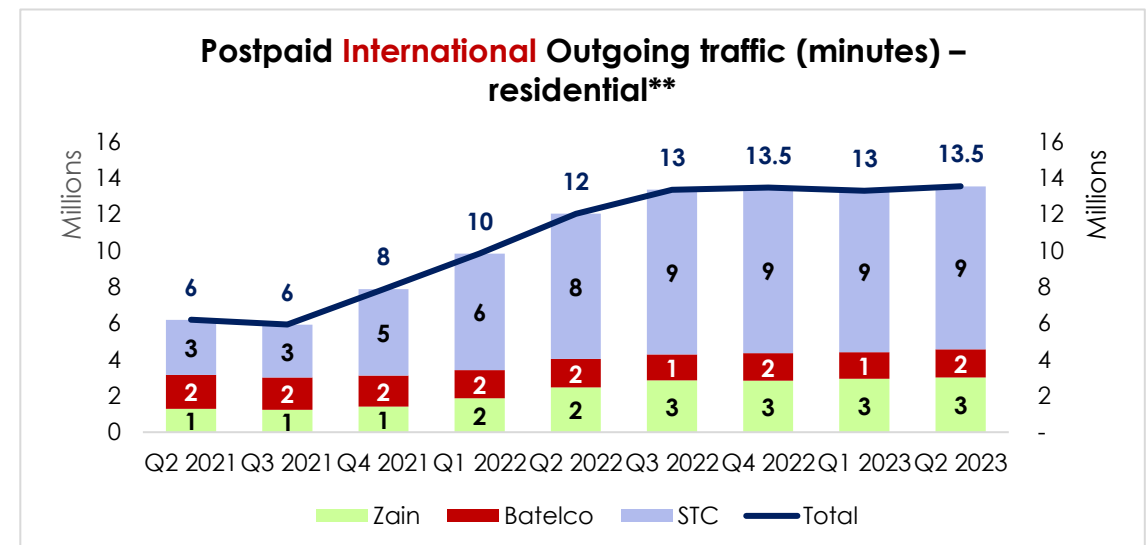
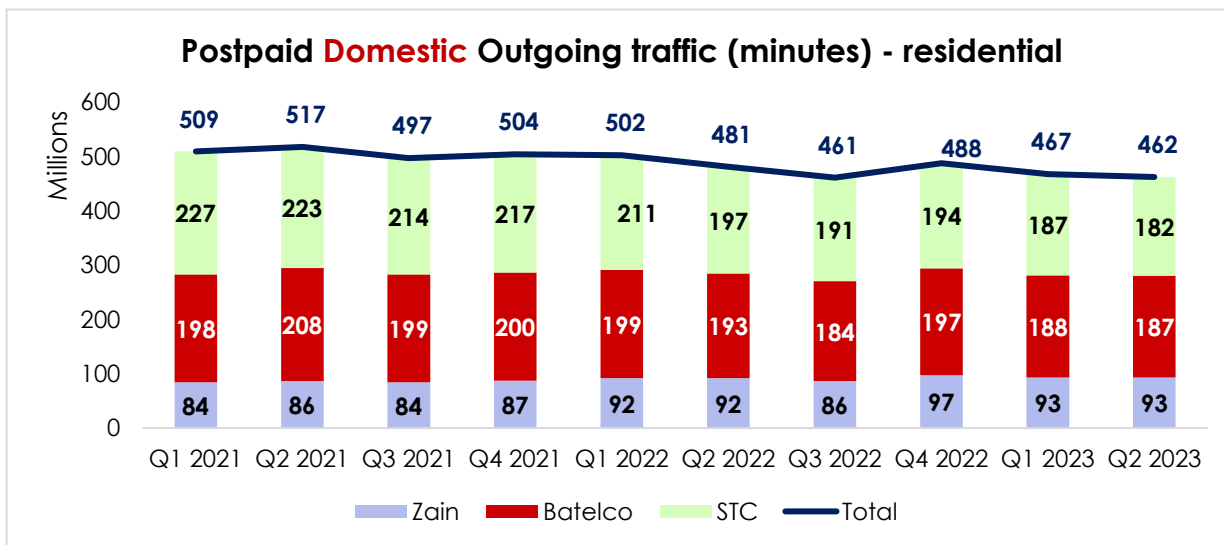
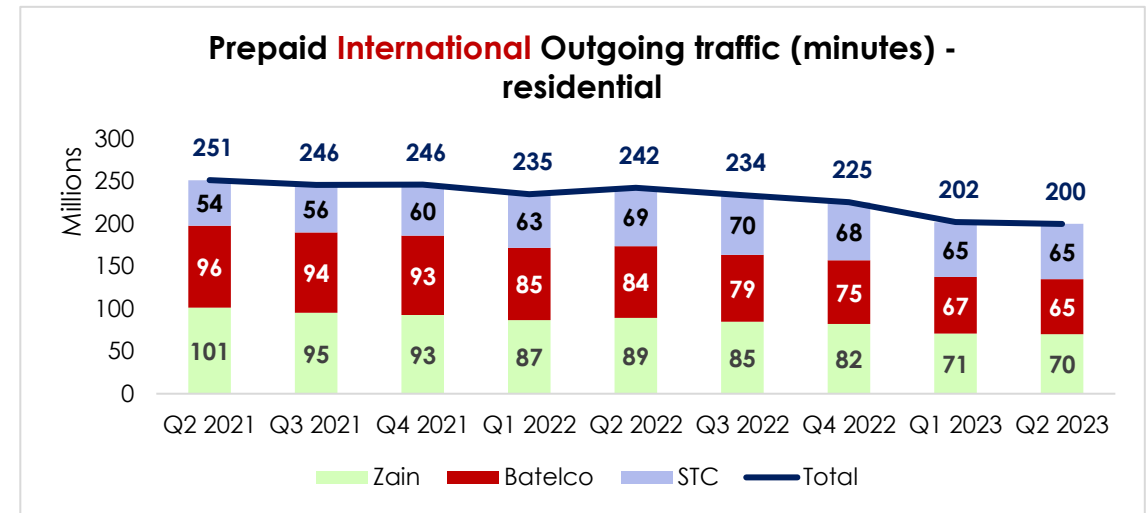
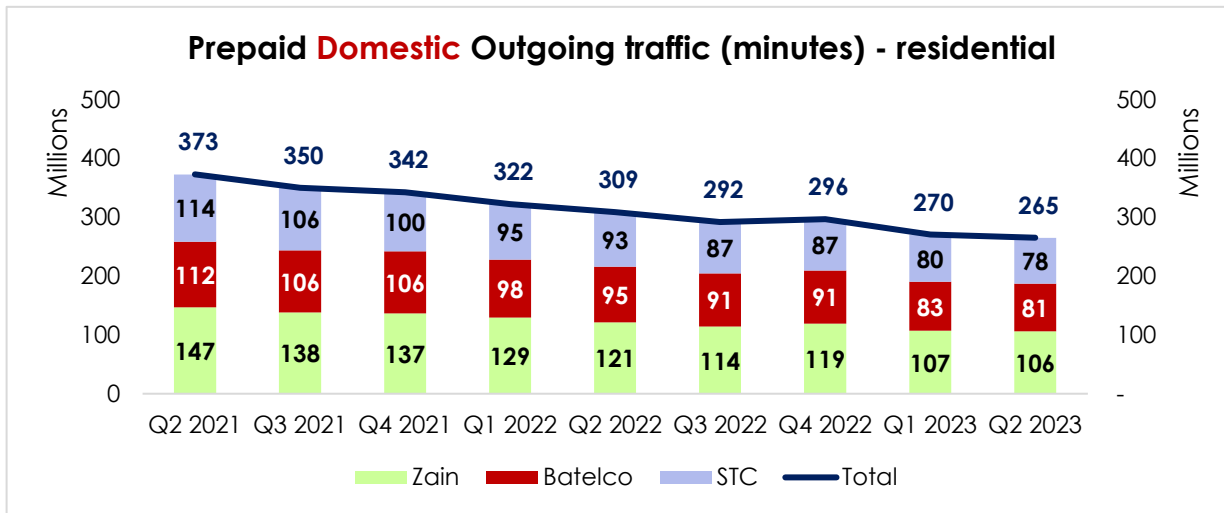
Total Outgoing Traffic in Minutes (Domestic + International)*

▼ 8%

Q2 2022	Q2 2023
1,102,757,095	1,013,135,808



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



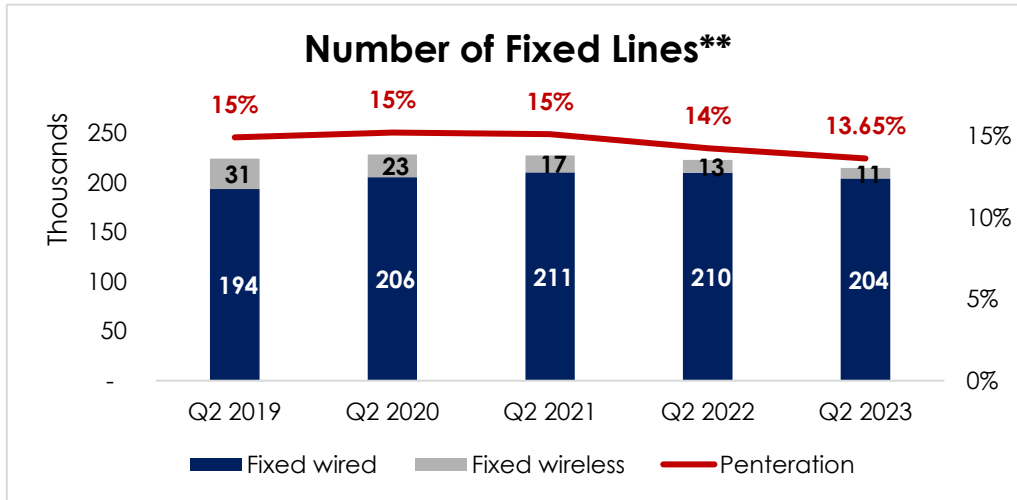
* Historical data for Non-residential (Domestic & Intl.) Traffic is currently unavailable.

** Increase in second half of 2021 is due to an operator launching a new postpaid plan offering International minutes.

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

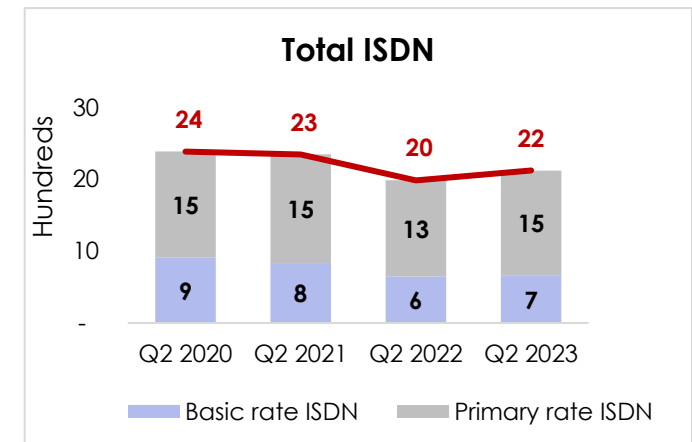
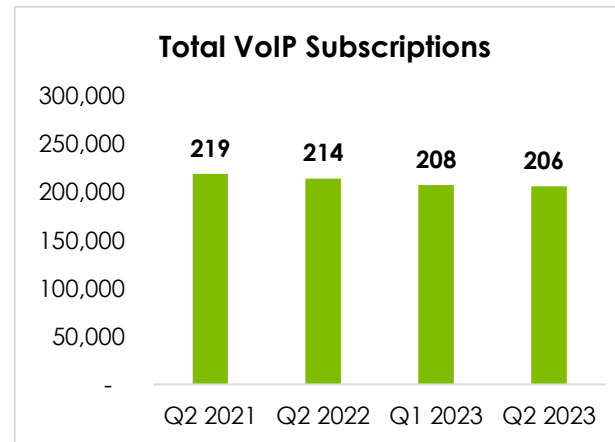
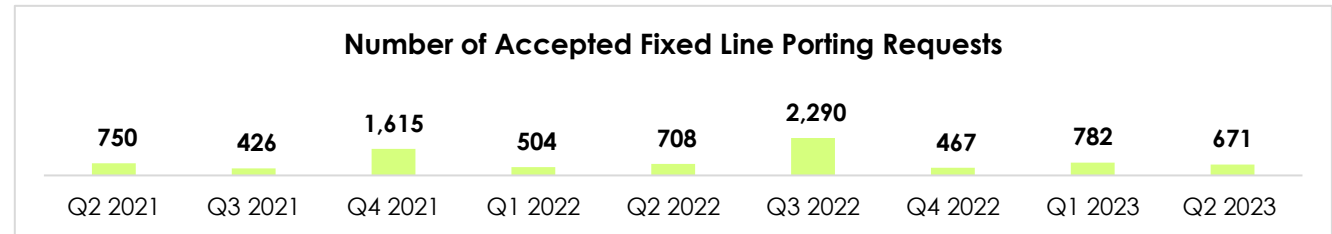
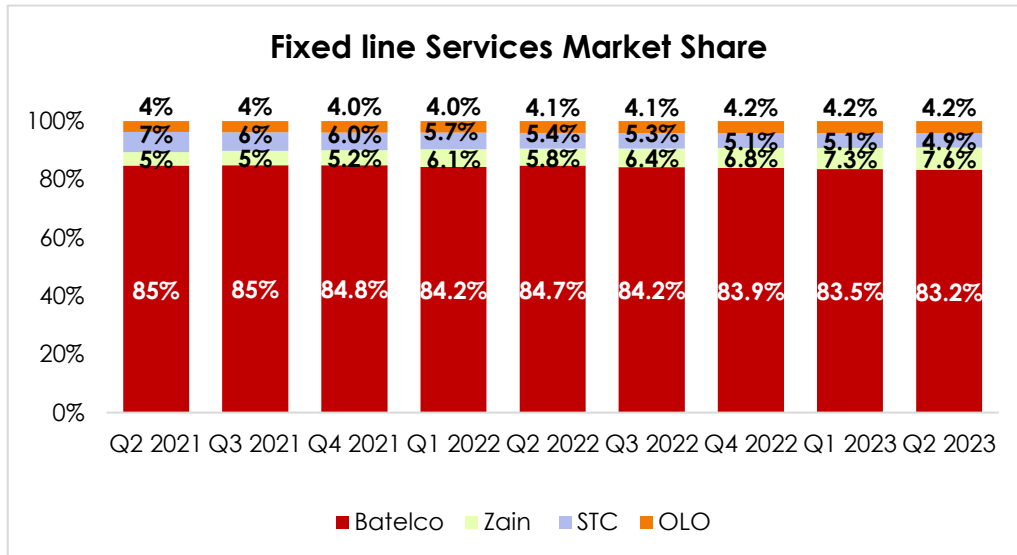


No. of fixed telephony subscriptions
(Excluding ISDN)



End of Q2 2022	End of Q2 2023
223,279	215,233
14.2% Penetration rate	13.6% Penetration rate

	2019	2020	2021	2022	Q2 2023
Q2 2023	224,962	228,121	227,133	217,077	215,233
% of Fixed Wired	88%	92%	93%	95%	95%
% of Fixed Wireless	12%	8%	7%	5%	5%



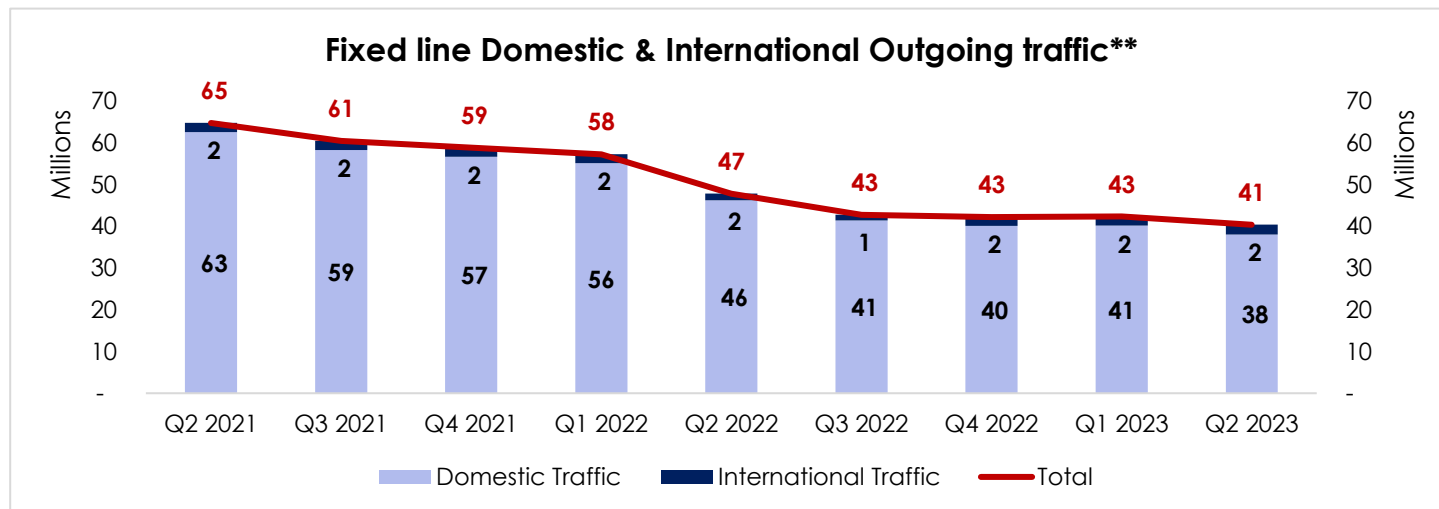
*Includes VoIP as of 2021 but excludes ISDN.

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

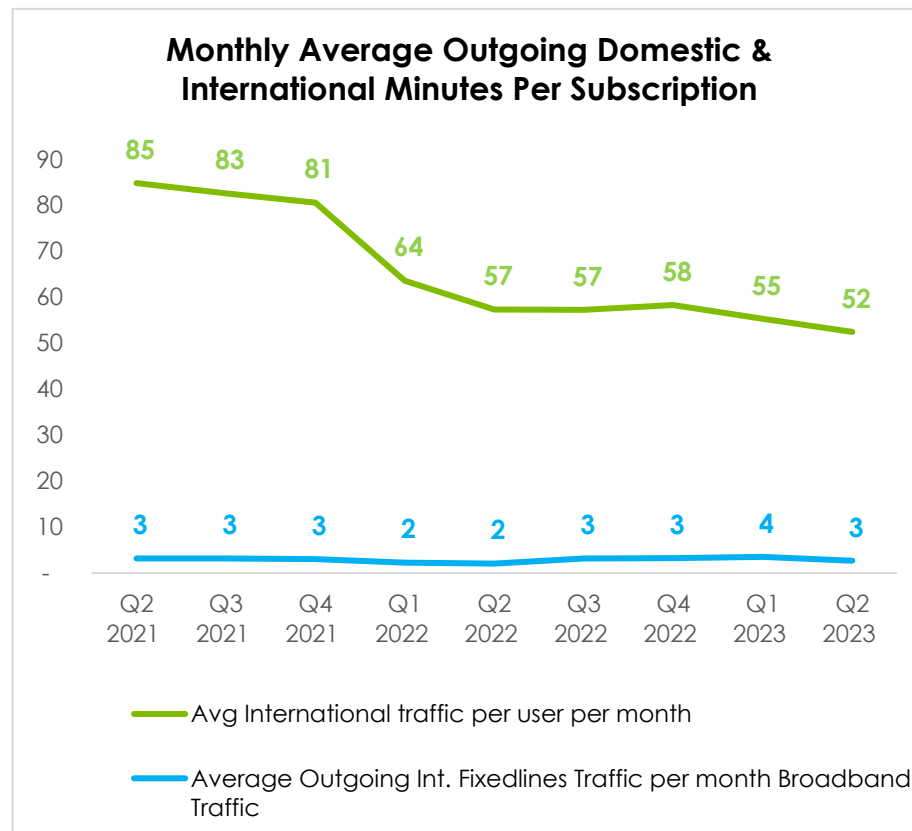
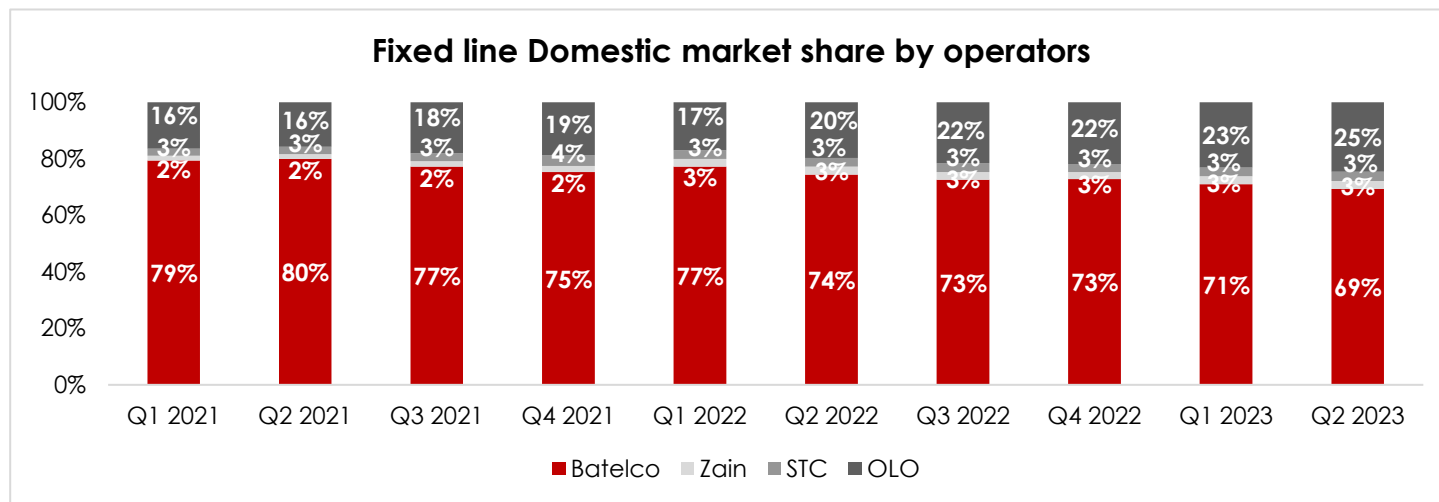
Fixed telephony services: Traffic (PSTN & Wireless - Minutes)*



Total fixed domestic outgoing traffic in minutes**



Q2 2022	Q2 2023
41,228,968	36,447,861



* Includes VoIP and ISDN traffic.

** Domestic outgoing traffic for OLOs revised from 2020 onwards. Further, Q1 & Q2 2022 traffic is under review.

Broadband services: Subscriptions* (1/2)



No. of broadband subscriptions (End of Q2 2023)

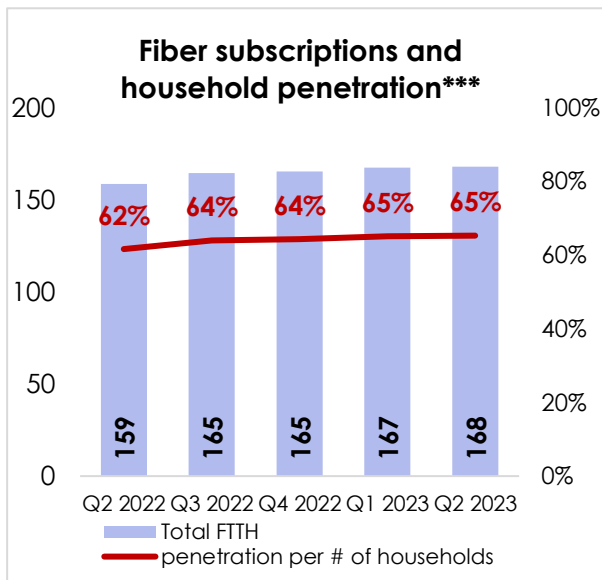
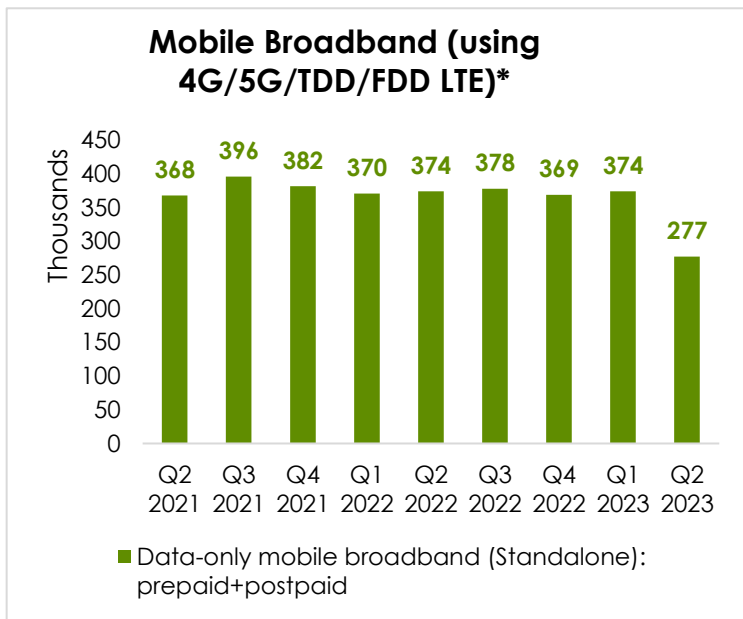
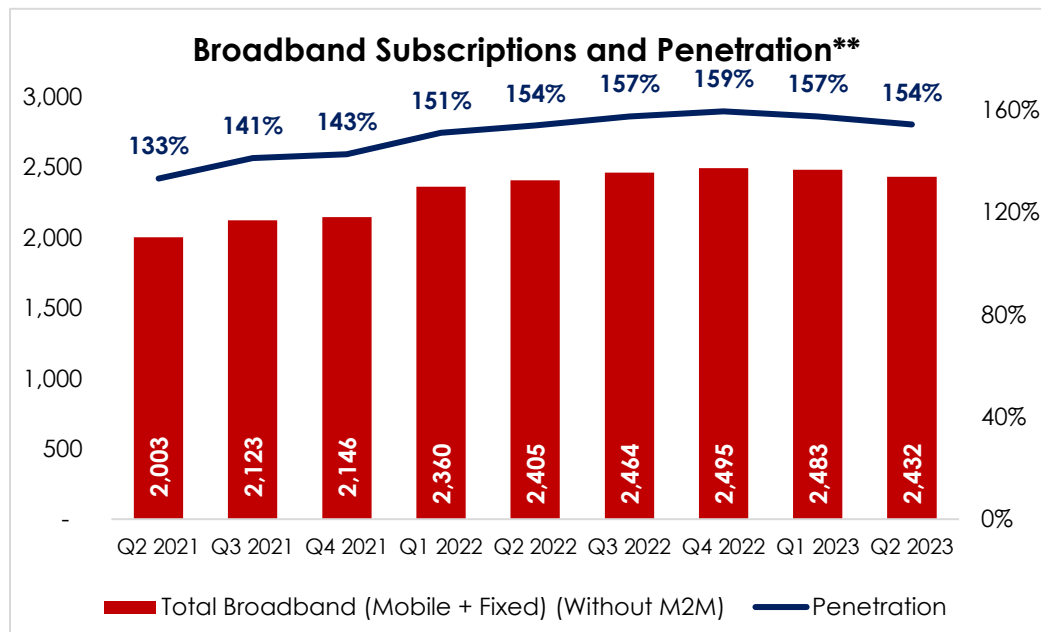
2,432,195

154% Penetration rate

Q2 2022
2,404,614

Q2 2023
2,432,195

1%



*** As per IGA's latest figures available for the number of households.



Mobile Broadband – Q2 2023



Proportion of broadband subscriptions by access type – Q2 2023



* Doesn't include M2M.

** Increase in subscriptions is due to Batelco correcting its reporting of Add-on to voice and Pay-per-use to match ITU definition of 90-days instead of 30-days. Also, newly activated SIMs that had an active add-on weren't reported previously.

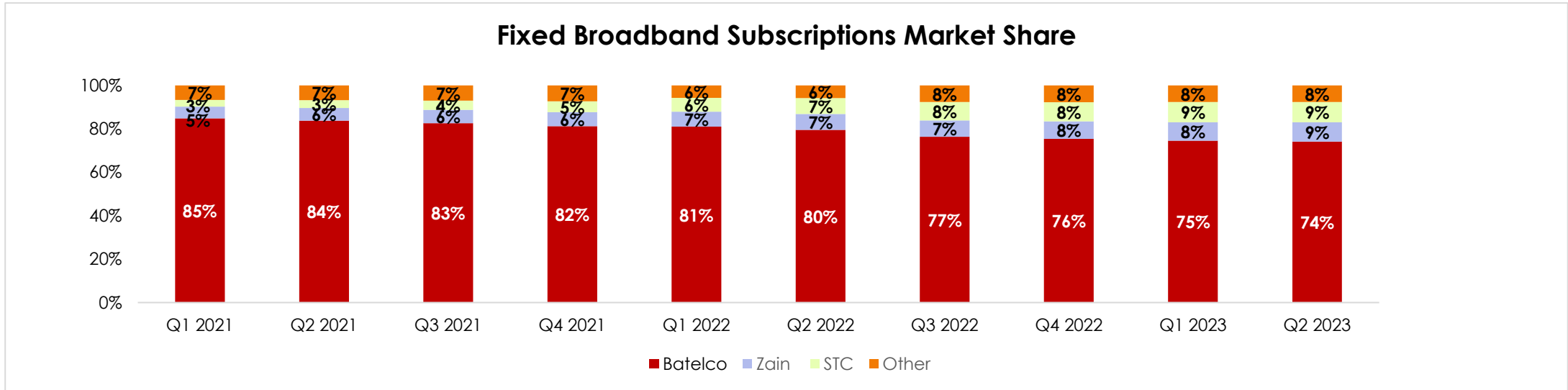
*** Drop is due to an operator activating voice service along with its mobile broadband service, hence numbers were shifted under mobile-cellular subscriptions

**** Includes BTC, STC and Zain data only.

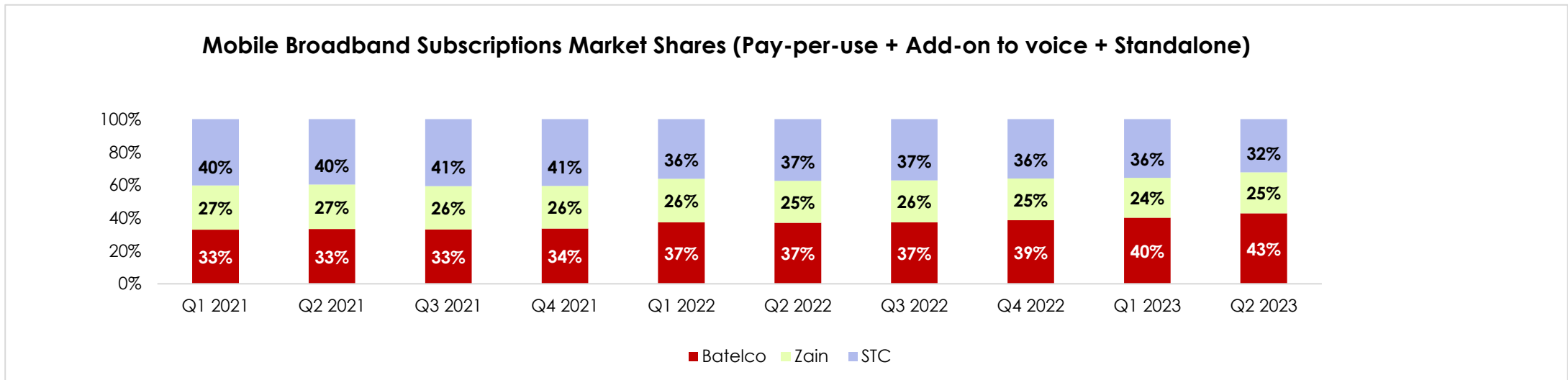
***** Number of households is based on the latest IGA data in 2021.

# of Households*****	2020	2021	2022	2023
By IGA	245,983	257,268	257,268	257,268

Broadband services: Subscriptions* (2/2)



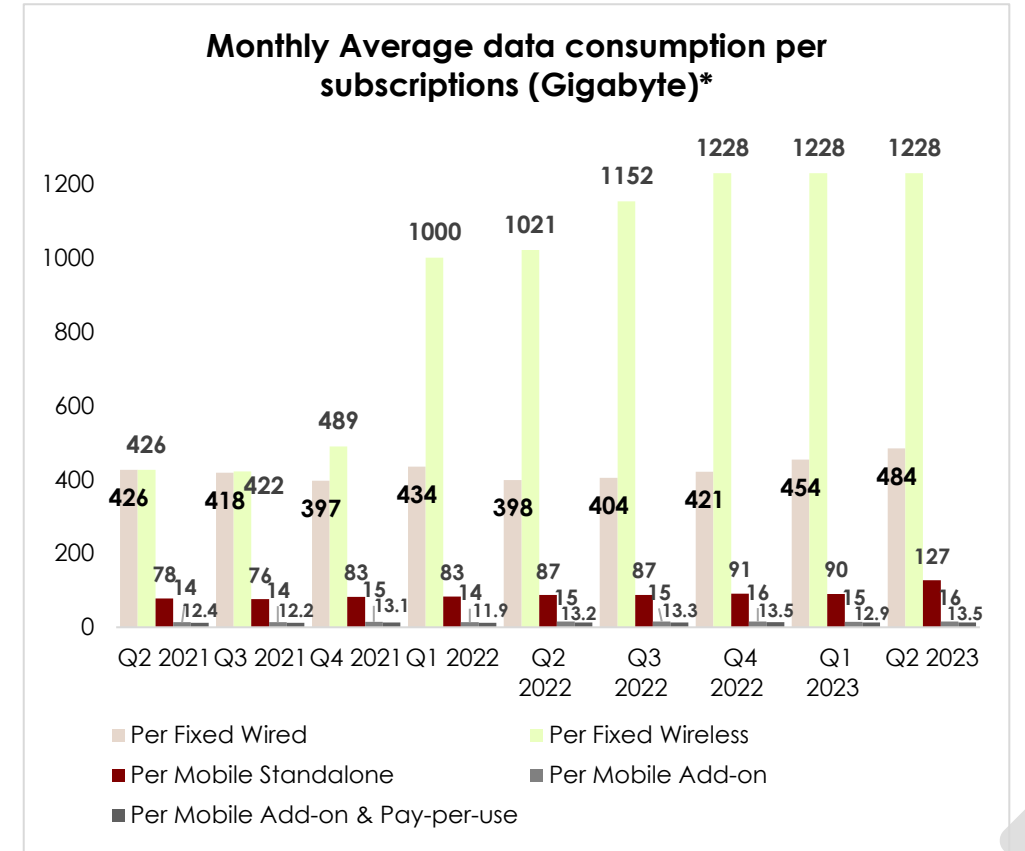
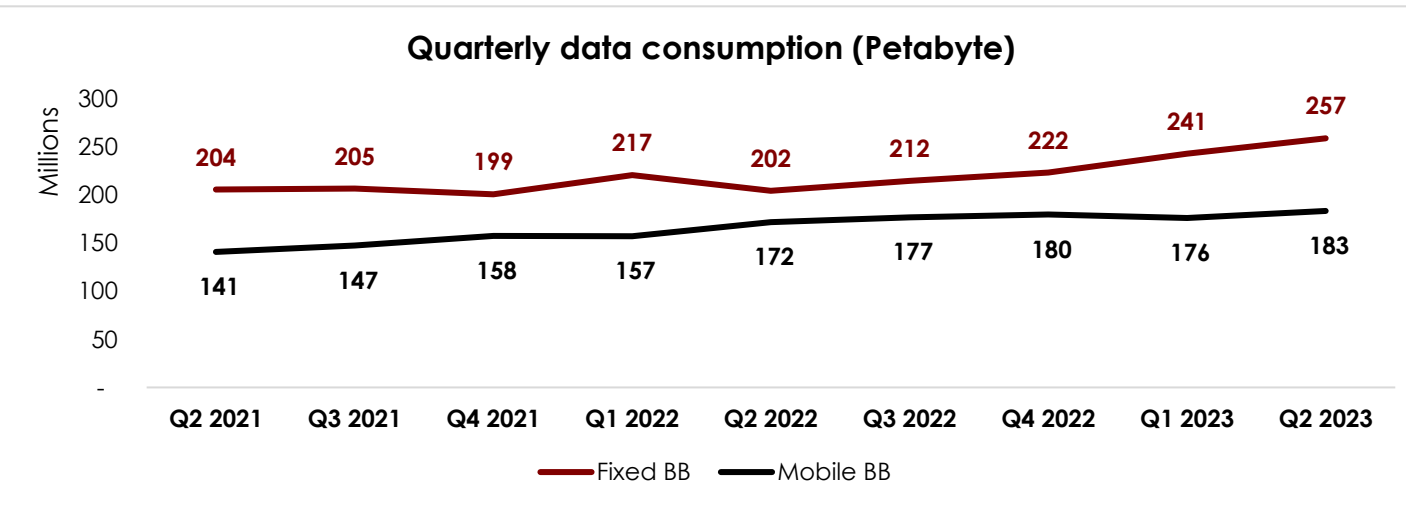
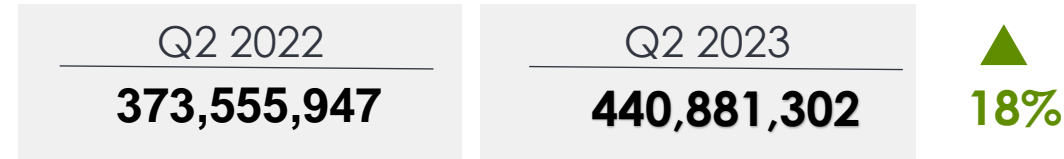
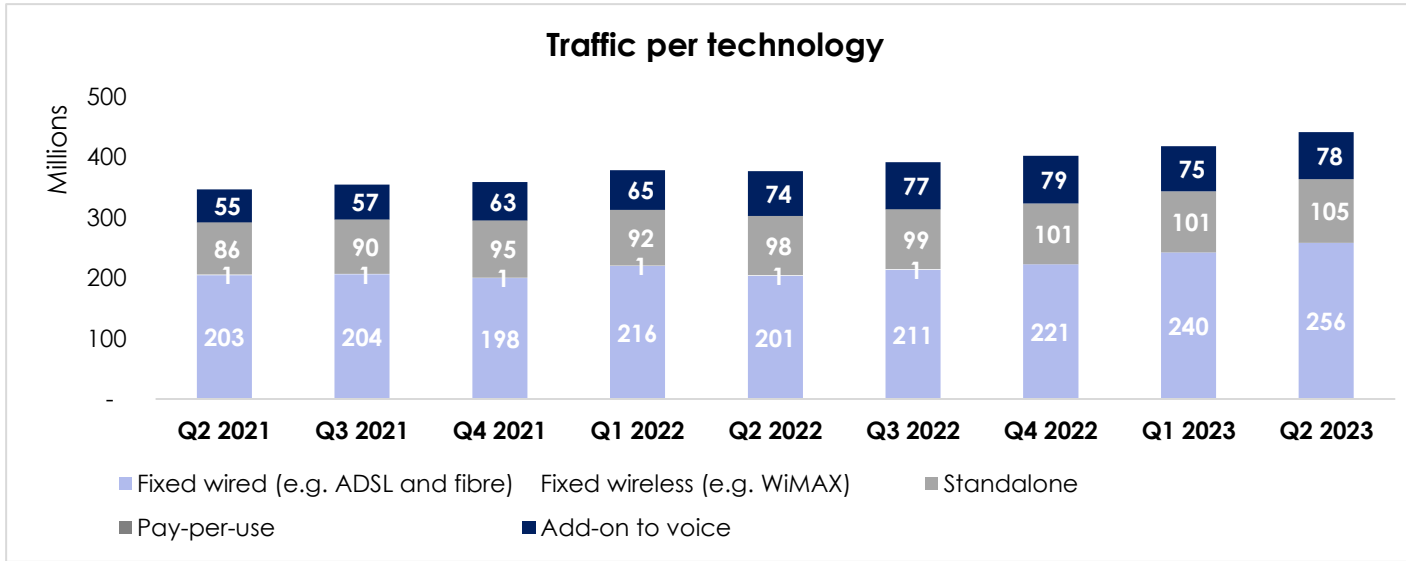
*Fixed Broadband includes Fixed wired, Fixed wireless and Dedicated Internet Service (DIA).



Broadband services: Data Traffic 1 of 2

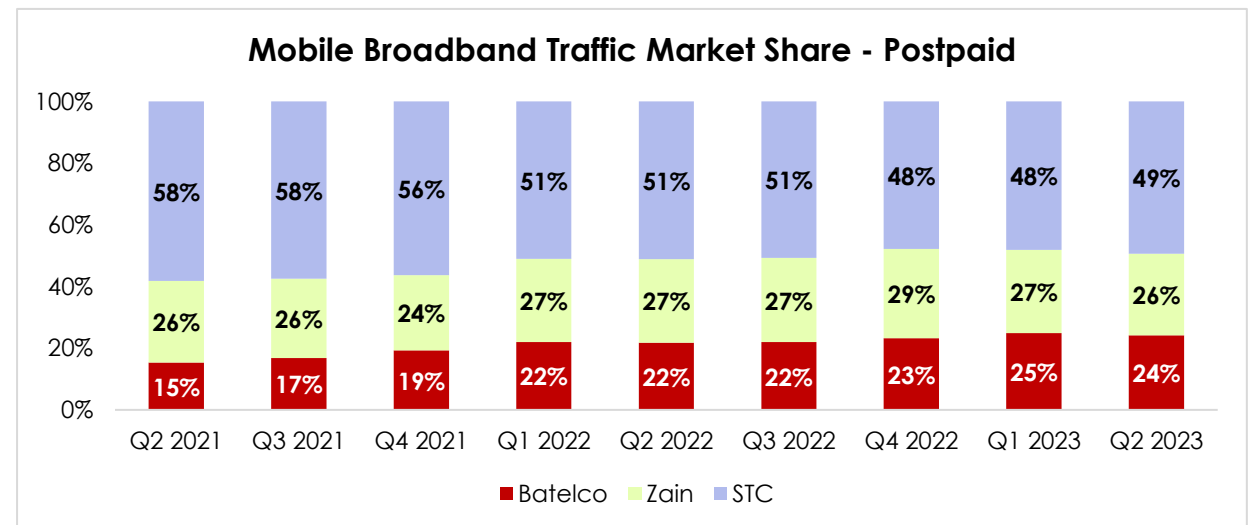
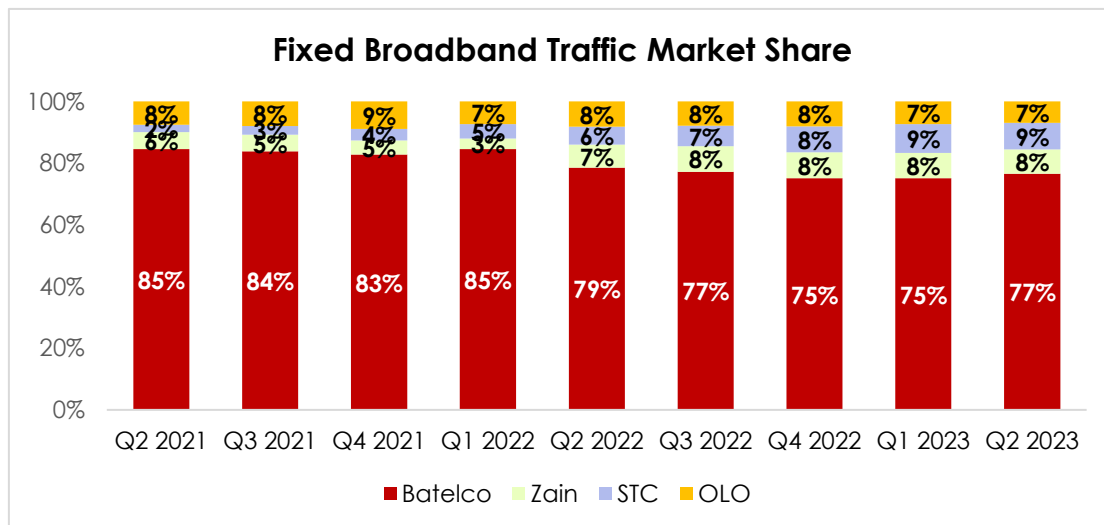
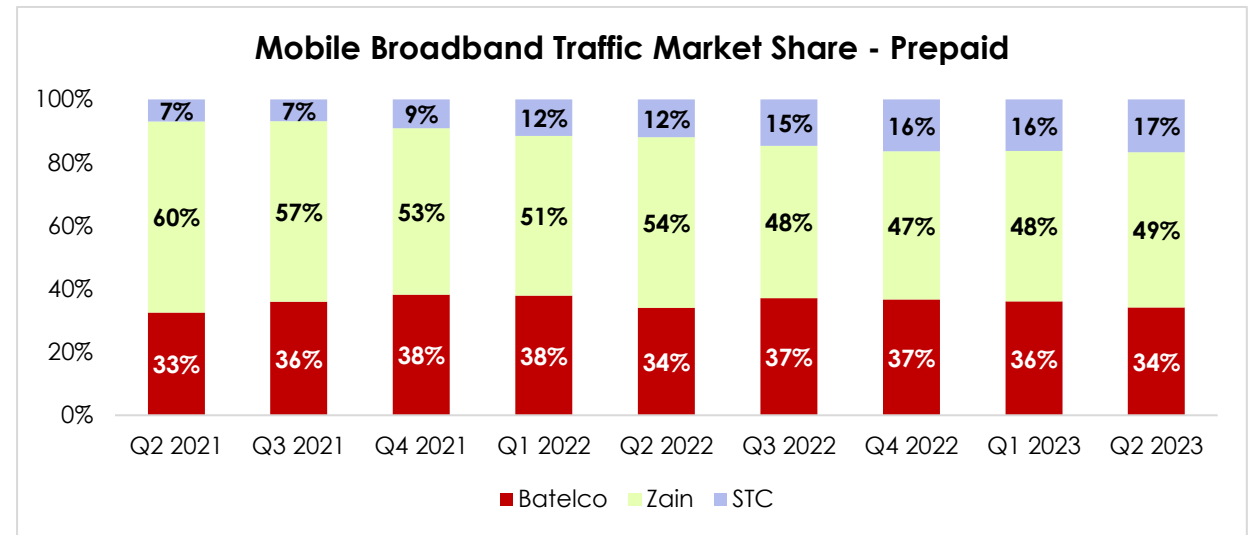
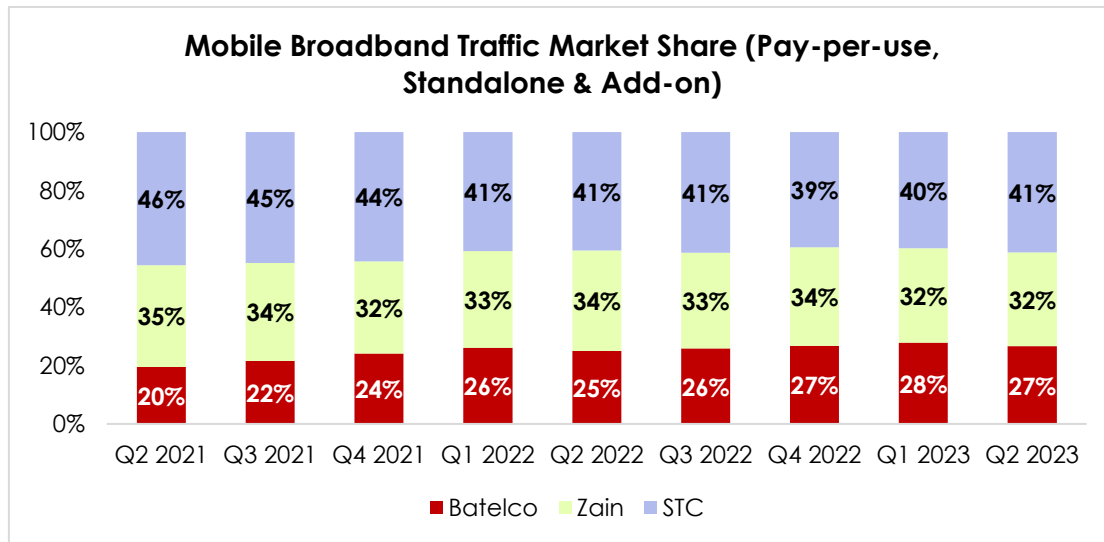


Total data traffic in Gigabyte



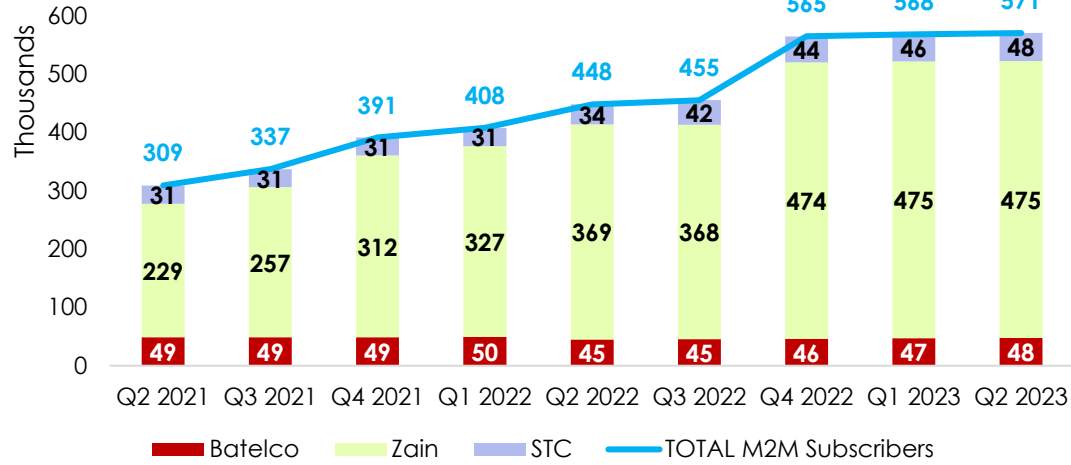
*Average fixed wireless traffic is relatively high due to non-residential subscribers having high usage.

Broadband services: Data Traffic 2 of 2

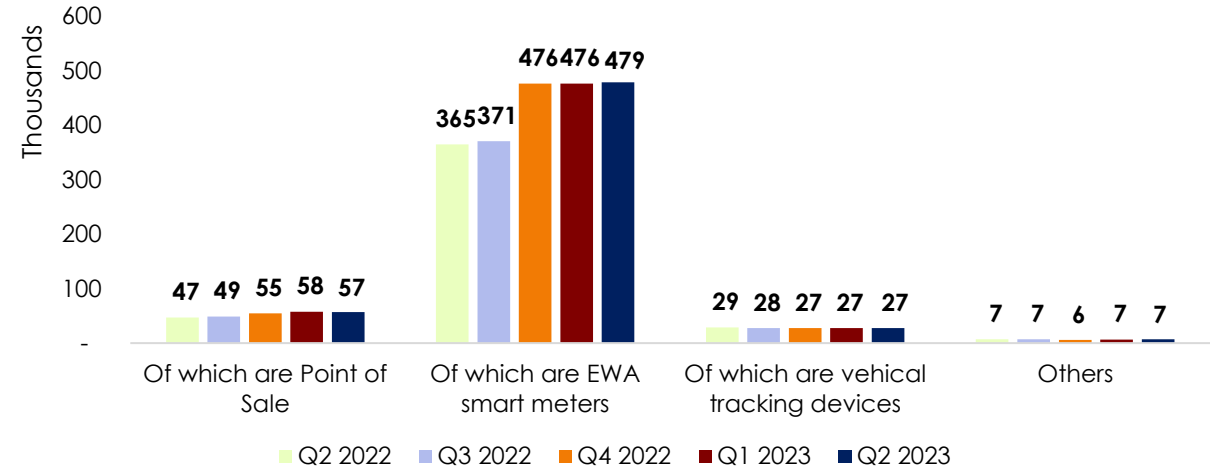


M2M Subscribers & Traffic

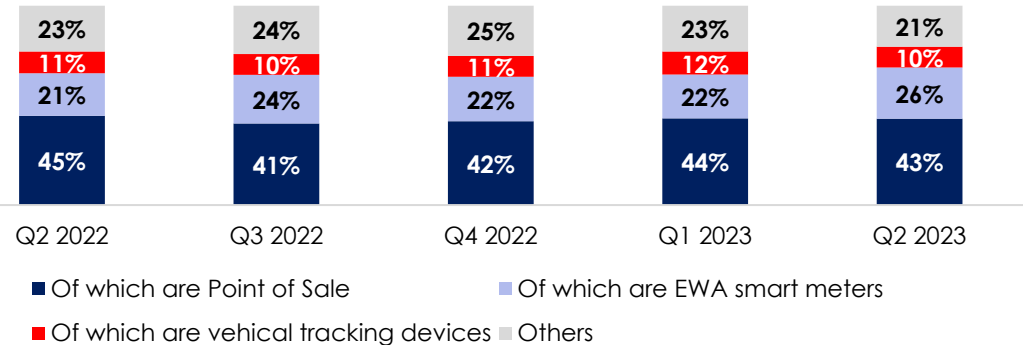
M2M Subscribers (Thousands)



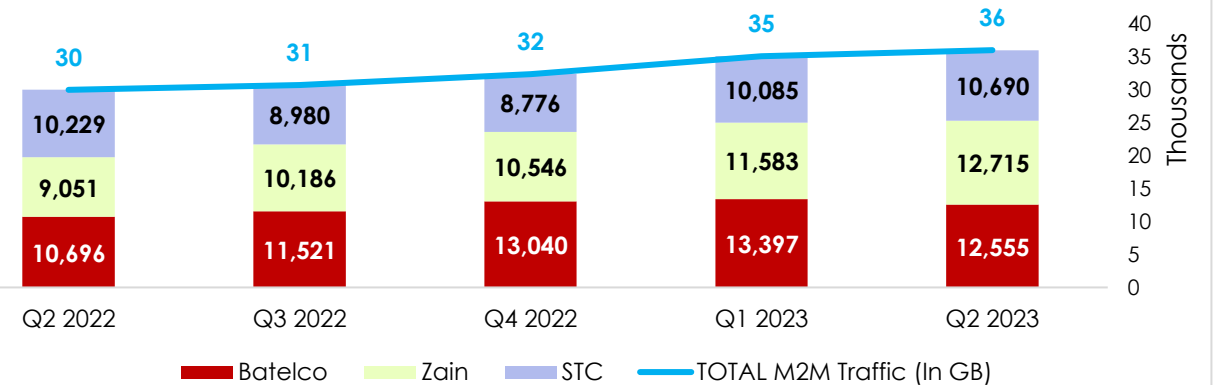
M2M Subscribers by type



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 non- <u>residential</u> subscribers				
	Q2 2022	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q2 2022	Q3 2022	Q4 2022	Q1 2023	Q2 2023
Batelco	474,024	494,067	532,275	556,874	595,732	N/A	N/A	N/A	N/A	N/A
Zain	436,473	445,257	434,705	430,642	427,940	639	494	525	396	382
STC	470,630	489,862	475,519	459,507	482,322	N/A	N/A	N/A	N/A	N/A
Total	1,381,127	1,429,186	1,442,499	1,447,023	1,505,994	640	494	525	396	382
Postpaid <u>residential</u> subscribers						Postpaid non- <u>residential</u> subscribers				
	Q2 2022	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q2 2022	Q3 2022	Q4 2022	Q1 2023	Q2 2023
Batelco	218,599	222,288	244,879	248,746	251,457	39,675	39,797	39,851	39,100	39,328
Zain	104,227	107,815	108,322	111,551	113,295	27,253	27,253	27,109	27,145	27,386
STC	246,346	251,246	253,956	253,349	336,274	20,301	22,934	24,122	25,281	25,092
Total	569,172	581,349	607,157	613,646	701,026	87,229	89,984	91,082	91,526	91,806

Fixed line subscriptions – raw data

Fixed line subscriptions – PSTN & VoIP (residential)

	Q2 2022	Q3 2022	Q4 2022	Q1 2023	Q2 2023
Batelco	131,406	129,651	128,325	127,599	126,485
Zain	11,879	12,690	13,381	14,189	14,771
STC	9,154	8,515	7,991	7,514	7,219

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

Batelco	57,744	54,968	53,891	53,386	52,710
Zain	1,177	1,279	1,459	1,555	1,673
STC	2,935	3,165	3,044	3,449	3,389
OLOs*	8,984	8,984	8,986	8,986	8,986
Total**	223,279	219,252	217,077	216,220	215,233

* Includes residential & non-residential

** Excluding ISDN.

*** in 2023, an operator amended its reporting starting Jan-22

	Q2 2022	Q3 2022	Q4 2022	Q1 2023	Q2 2023
Basic-rate ISDN	741	740	718	715	705
Primary-rate ISDN	1,463	1,470	1,467	1,459	1468
Total	2,204	2,210	2,185	2,174	2,173

Fixed Broadband subscriptions – raw data

Fixed Broadband subscriptions – (Fixed wired & Fixed wireless) (residential)

	Q2 2022	Q3 2022	Q4 2022	Q1 2023	Q2 2023
Batelco	131,819	131,049	130,106	129,974	129,291
Zain	11,154	11,984	12,693	13,511	14,115
STC	10,968	13,098	13,428	14,078	14,022

Fixed Broadband subscriptions – (Fixed wired & Fixed wireless) (non-residential)

	Q2 2022	Q3 2022	Q4 2022	Q1 2023	Q2 2023
Batelco	2,606	2,451	2,399	2,349	2,295
Zain	1,128	1,231	1,417	1,508	1,623
STC	1,389	1,723	2,164	2,414	2,570
OLOs (res+nonres)	9,889	13,304	13,569	13,569	13,569
Total	168,953	174,840	175,776	177,403	177,485

* in 2023, an operator amended its reporting starting Jan-22 to include business fiber over BNet WBS.

Total Mobile Broadband subscriptions* – raw data

Mobile Broadband subscriptions – (Prepaid)

	Q2 2022	Q3 2022	Q4 2022	Q1 2023	Q2 2023
Batelco	474,024	494,067	532,275***	556,874	595,732
Zain	395,770	405,792	404,159	373,068	368,482
STC	388,649	403,612	387,840	372,646	351,684

Mobile Broadband subscriptions – (Postpaid)

Batelco	355,557	360,841	363,828	367,401	371,006
Zain	172,972	178,936	182,193	187,034	190,611
STC	448,689	445,818	449,422	447,242	377,195
Total**	2,235,661	2,289,066	2,319,717	2,304,265	2,254,710

* Refer to next slide for Mobile BB breakdown

** Excluding M2M

*** Increase in prepaid Mobile BB is due to an operator revising definition to reflect subscriptions that had access to Internet in the last 90 days rather than 30 days previously (i.e. ITU definition).

**** Some operators data have been restated for 2022-2023

Breakdown of Mobile Broadband subscriptions – raw data

Mobile Broadband subscriptions – (Prepaid)

	Q2 2022			Q3 2022			Q4 2022			Q1 2023			Q2 2023		
	Batelco	Zain	STC	Batelco	Zain	STC	Batelco	Zain	STC	Batelco	Zain	STC	Batelco	Zain	STC
Standalone	0*	5,036	15,123	0*	6,466	16,677	0	9,728	17,262	0	9,832	19,637	0	9,072	0***
Add-on to voice	338,854	303,107	338,642	351,077	313,226	352,316	377,128**	309,561	341,176	359,082	304,075	326,762	363,416	312,240	327,070
Pay-per-use	135,170	87,627	34,884	142,990**	86,100	34,619	155,147	84,870	29,402	197,792	59,161	26,247	232,316	47,170	24,614

Mobile Broadband subscriptions – (Postpaid)

Standalone	97,283	60,111	199,230	98,756	63,156	196,340	79,098	66,157	196,639	79,555	69,463	195,518	79,631	80,742	115,494
Add-on to voice	256,421	112,601	251,913	260,244	115,540	252,519	282,910	115,822	252,356	286,996	118,607	251,312	289,952	118,615	261,306
Pay-per-use	1,853	260	555	1,841	240	465	1,820	214	427	850	181	412	833	326	395
Total	829,581	568,742	840,347	854,908	584,728	852,936	896,103	586,352	837,262	924,275	561,319	819,888	966,148	568,165	728,879

* Decrease is due to an operator's recent package optimization exercise.

** Increase prepaid Add-on-to-voice and pay-per-use is due to an operator revising definition to reflect subscriptions that had access to Internet in the last 90 days rather than 30 days previously (i.e. ITU definition). Also, it did not include newly activated SIMs in the market that had active Add-on.

***An operator shifted its mobile BB subscriptions to home BB after reconsidering the definitions of mobile and home BB.