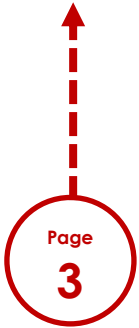


# Quarterly Market Indicators

Q3 2020

# Content

Disclaimer



Mobile services



Fixed line  
telephony services



Broadband services



M2M Subscribers  
& Traffic



Definitions



## Disclaimer

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# Main Market Indicators for Q3 2020



Mobile subscribers:  
**1,749,223**

Penetration:  
**118%**

Average minutes per  
**month** per mobile  
subscription:  
**257**

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



Mobile Prepaid  
subscribers:  
**1,197,044**

% of Prepaid of Mobile  
Market:  
**68%**



Mobile Postpaid  
subscribers:  
**552,179**

% of Postpaid of Mobile  
Market:  
**32%**



Fixed-telephony  
subscribers:  
**225,814**

Penetration:  
**15%**

Domestic **monthly**  
average minutes per  
line:  
**48**



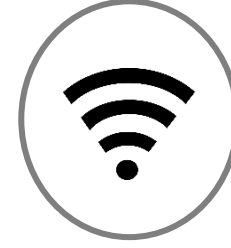
Fixed Wired Telephony  
subscribers:  
**91%**

Fixed Wireless  
Telephony subscribers:  
**9%**



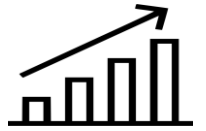
International Outgoing  
Minutes (Mobile):  
**305,650,624**

International Outgoing  
Minutes (Fixed telephony):  
**1,065,474**



Broadband  
subscriptions:  
**1,975,795**

Broadband  
penetration rate:  
**133%**



Total Data Usage:  
**286 Petabyte**

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

Fixed Broadband  
Traffic:  
**144 Petabyte**

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

Mobile  
Broadband  
Traffic\*\*:  
**142 Petabyte**

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

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

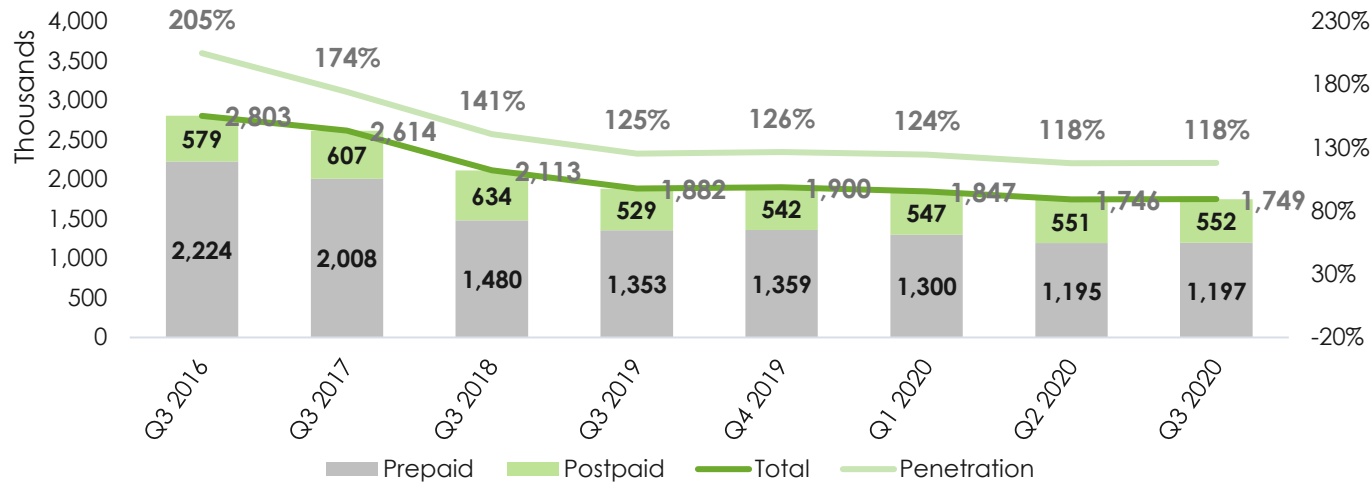
\*\* Includes Broadband added to voice & Standalone mobile broadband

# Mobile services: Subscriptions

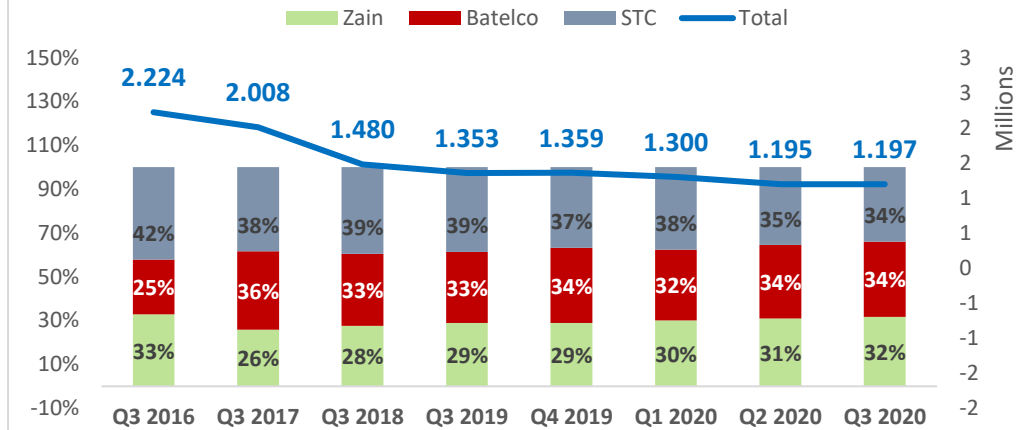


**Number of Mobile subscriptions (End of Q3 2020)**  
**1,749,223 Subscriptions**  
 118% Penetration rate

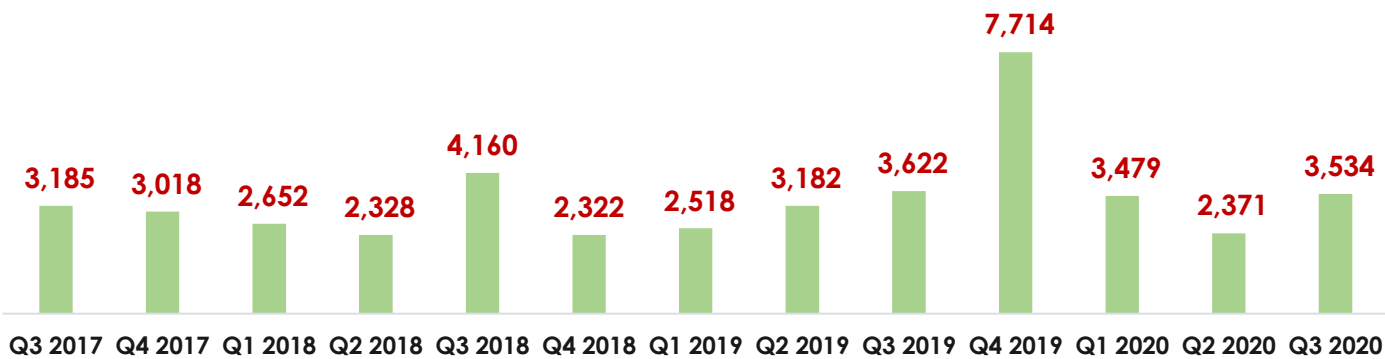
**Number of mobile subscriptions & penetration**



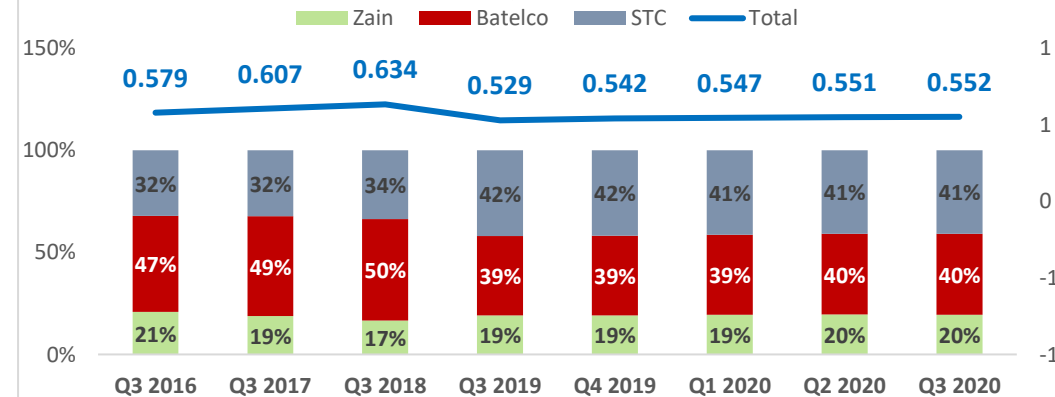
**Mobile Prepaid subscribers**



**Number of Accepted Mobile Porting Requests**



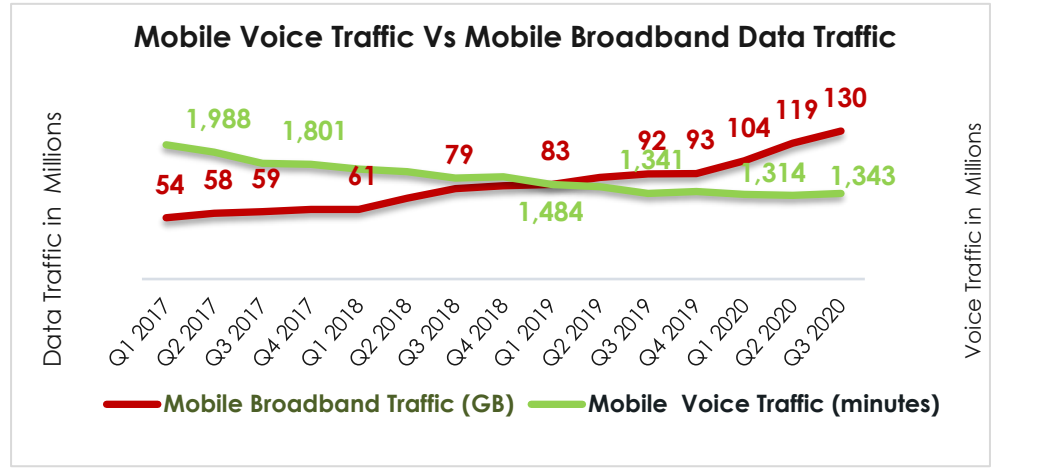
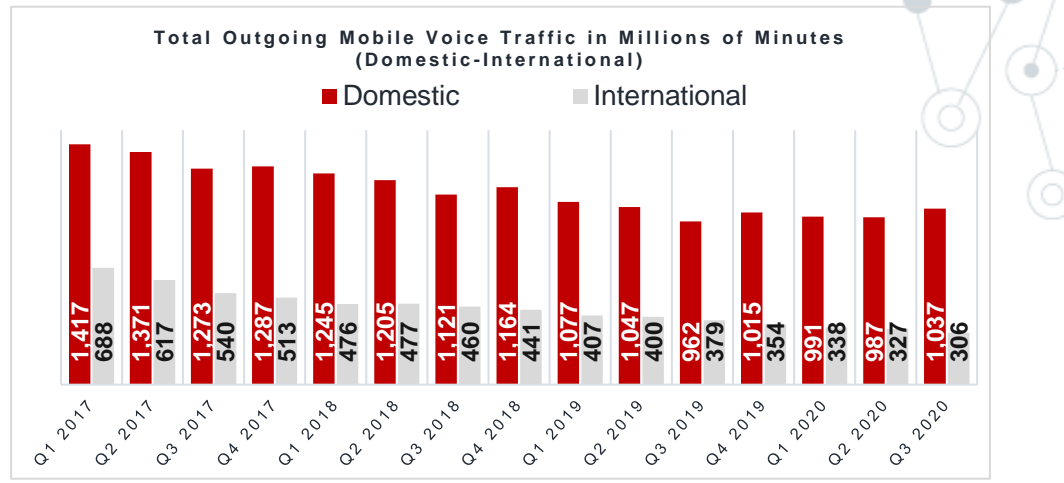
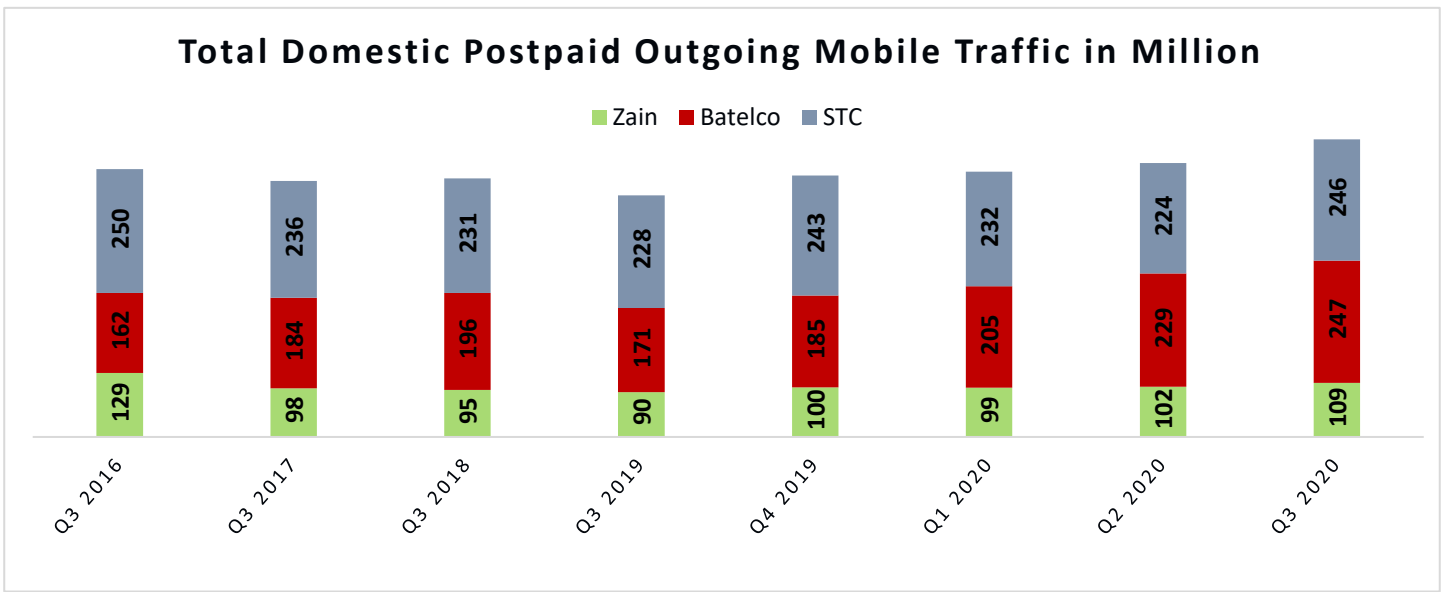
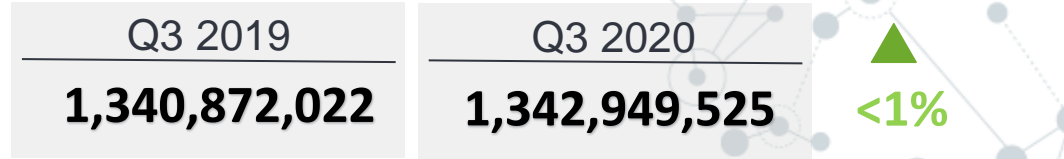
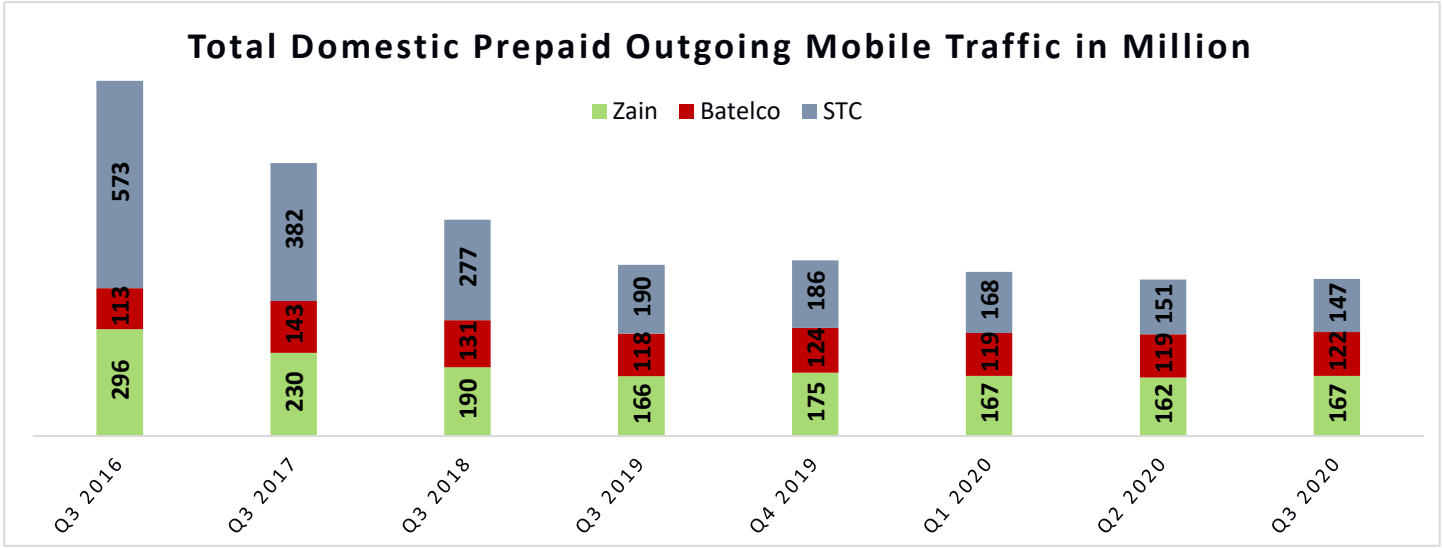
**Mobile Postpaid subscribers**



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)

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

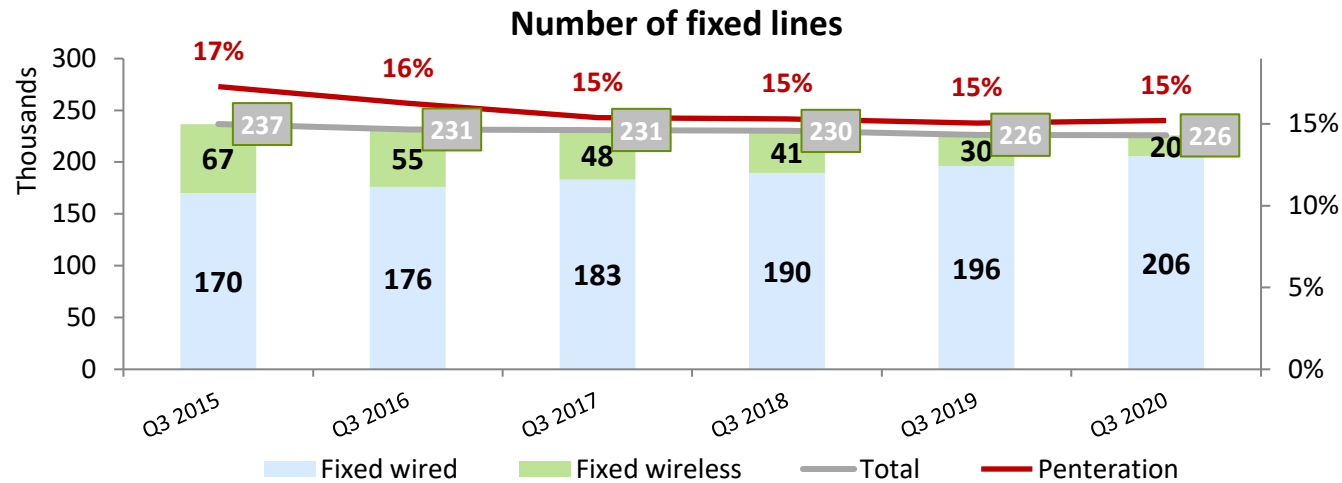


\* Revised for 2019 data

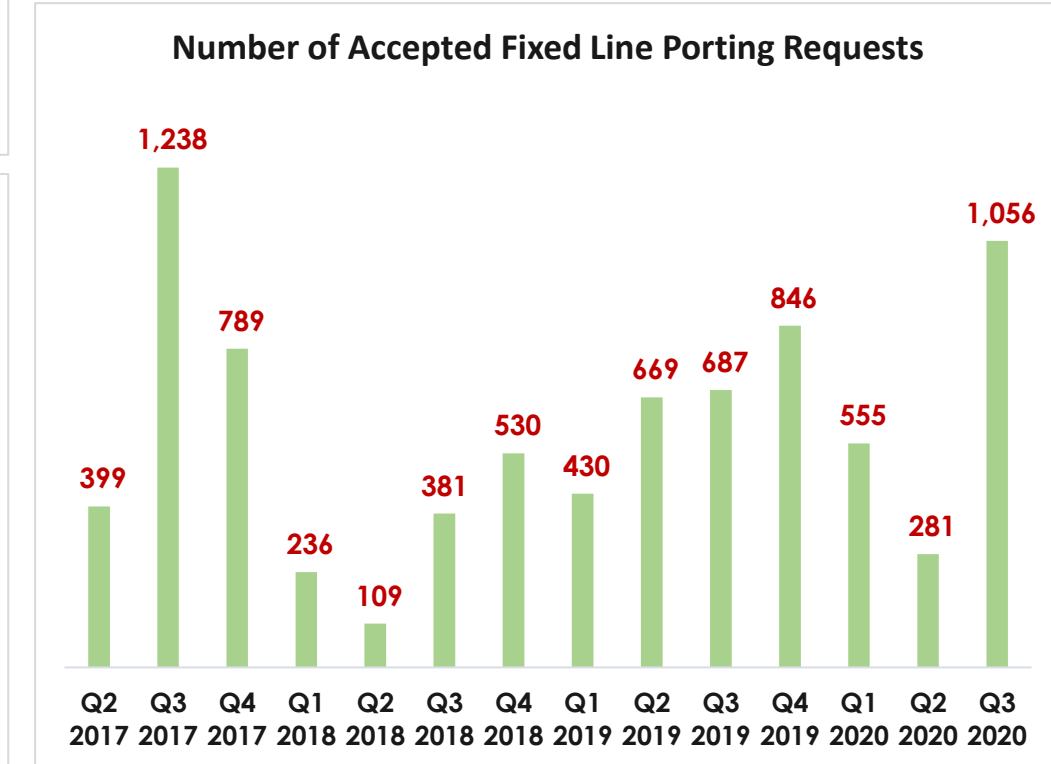
# Fixed telephony services: Subscriptions (PSTN & Wireless)



No. of fixed telephony subscriptions

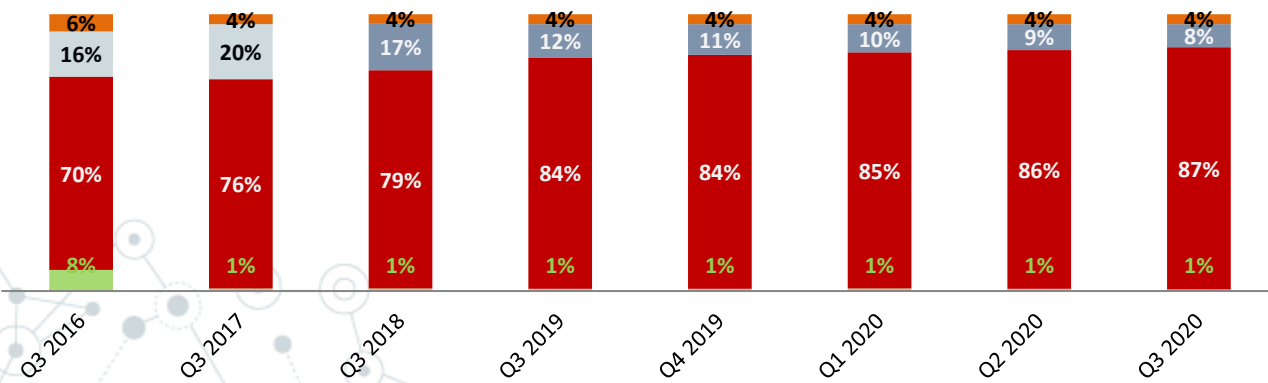


	2017	2018	2019	Q3 2020
<b>Total</b>	<b>234,709</b>	<b>225,479</b>	<b>225,797</b>	<b>225,814</b>
% of Fixed Wired	79%	85%	88%	91%
% of Fixed Wireless	21%	15%	12%	9%



## Fixed telephone lines market share

Zain Batelco STC Mena Other



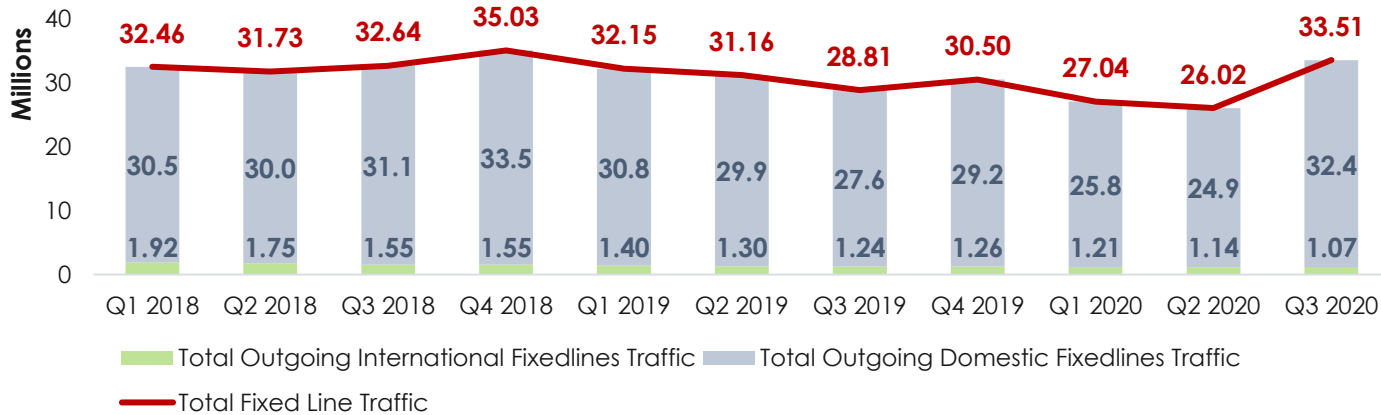
# Fixed telephony services: Traffic (PSTN & Wireless - Minutes)



Total fixed domestic outgoing traffic in minutes\*\*

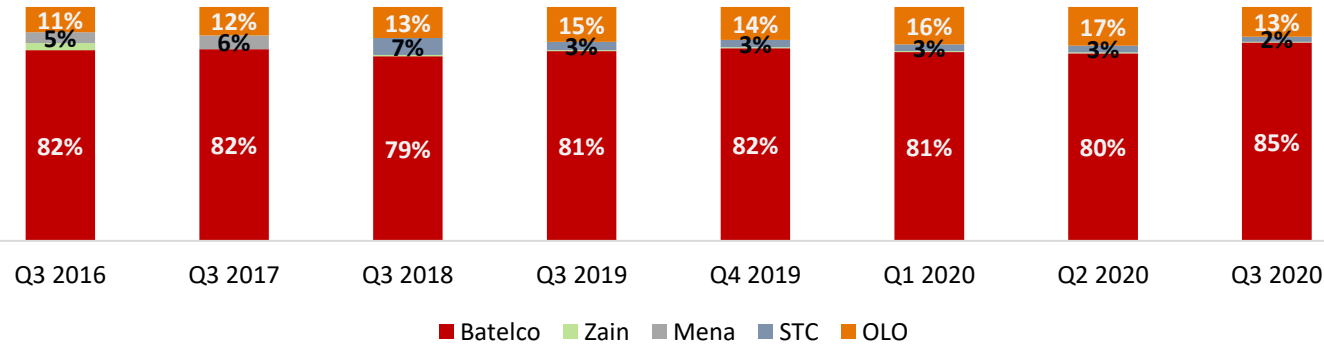
▲ 16%

Fixed Line Domestic & International Outgoing Traffic (Minutes)\*

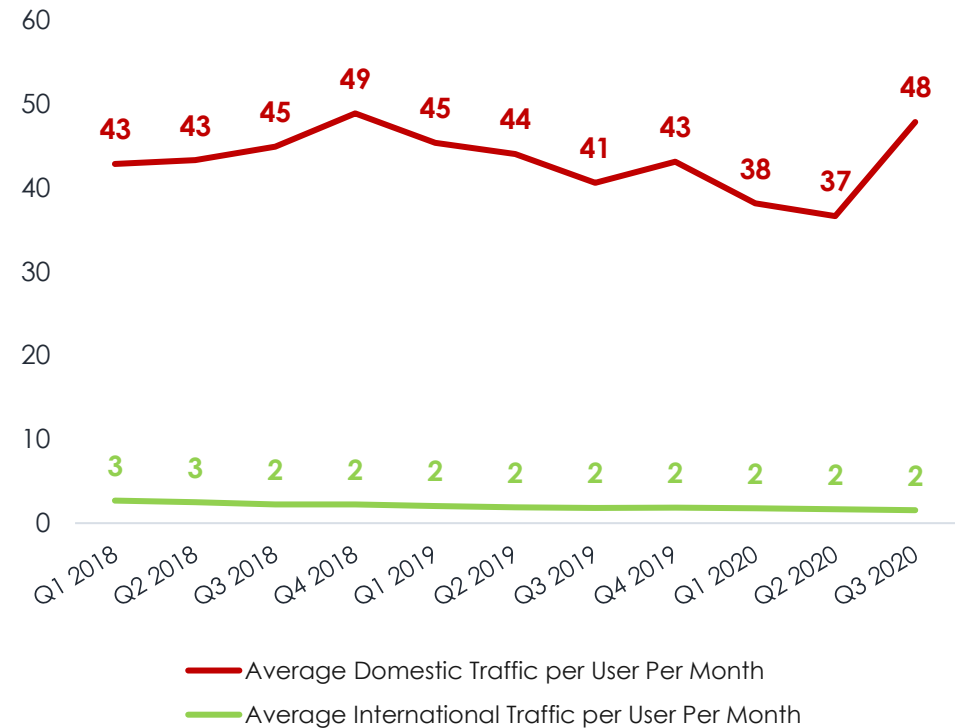


\*Increase in total fixed line traffic is due to an operator's increase in Domestic Fixed PSTN. Q3 data is currently under audit. Changes will be reflected in the upcoming report.

Fixed Domestic Traffic Market Share



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

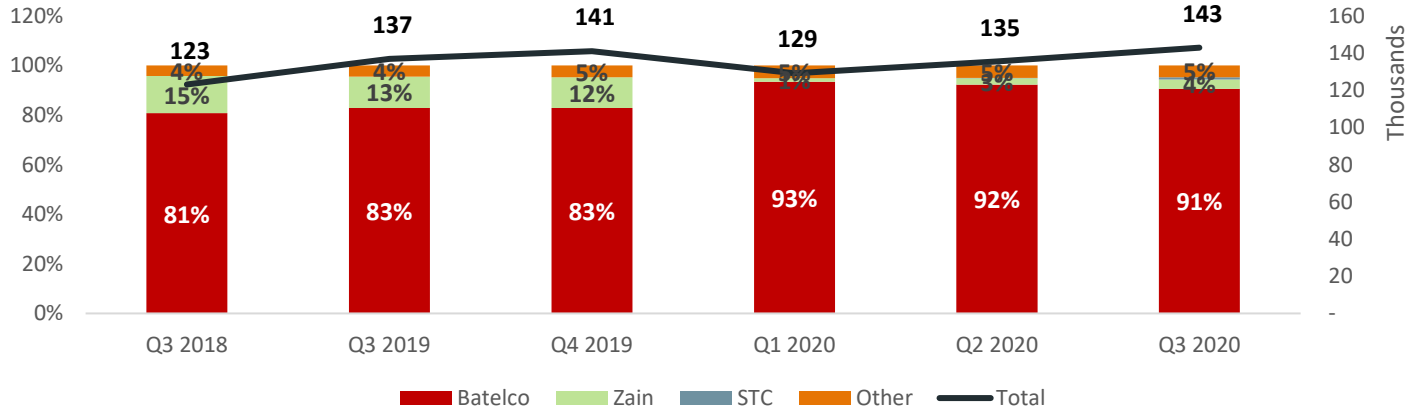


# Broadband services: Subscriptions\*\*

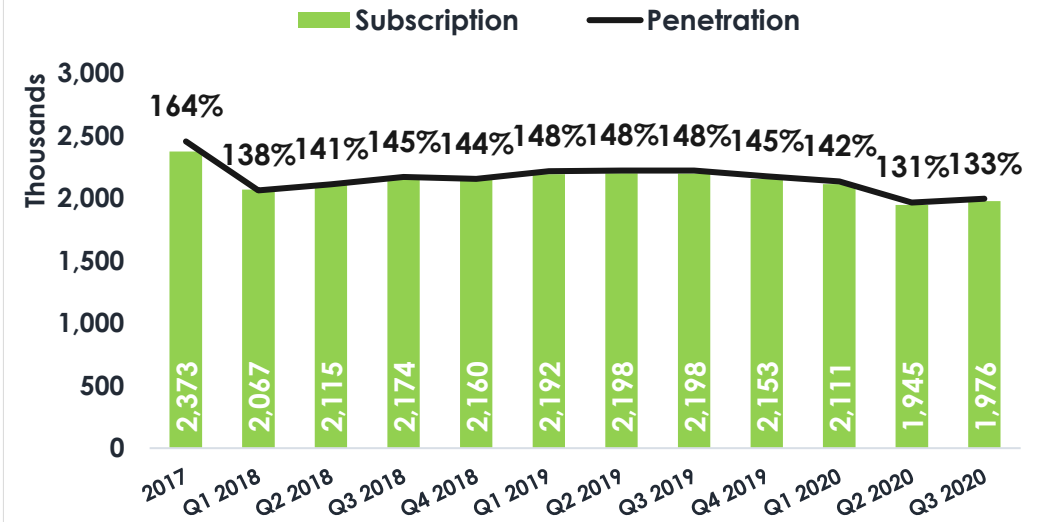


No. of broadband subscriptions (End of Q3 2020)\*  
**1,975,795**  
 133% Penetration rate

### Fixed Broadband Subscriptions Market Share\*

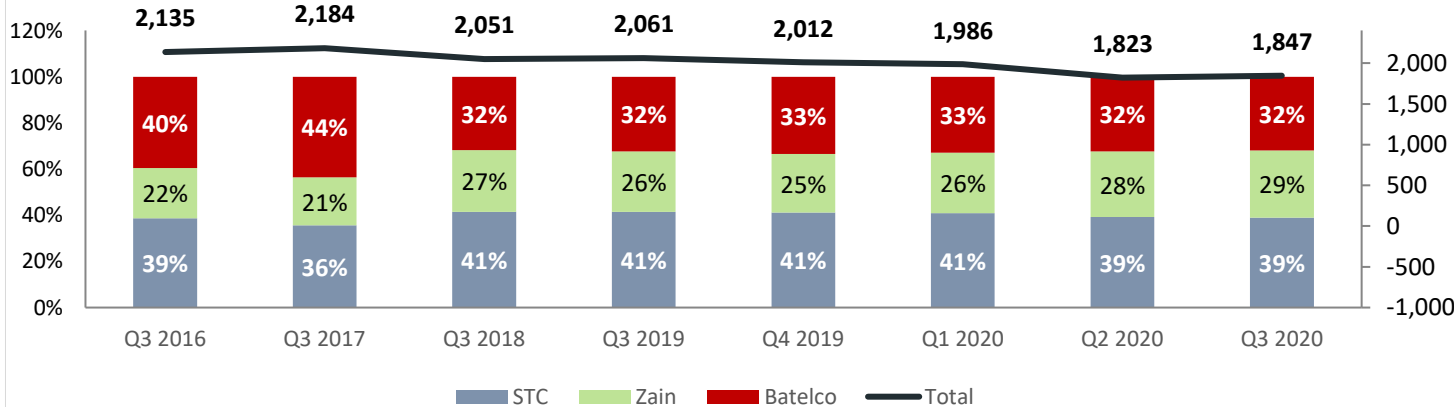


### Broadband Subscriptions and Penetration



\*Fixed Broadband includes Fixed wired and Fixed wireless

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



### Mobile Broadband – Q3 2020



### Proportion of broadband subscriptions by access type – Q3 2020



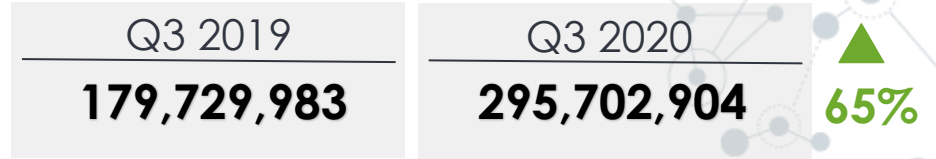
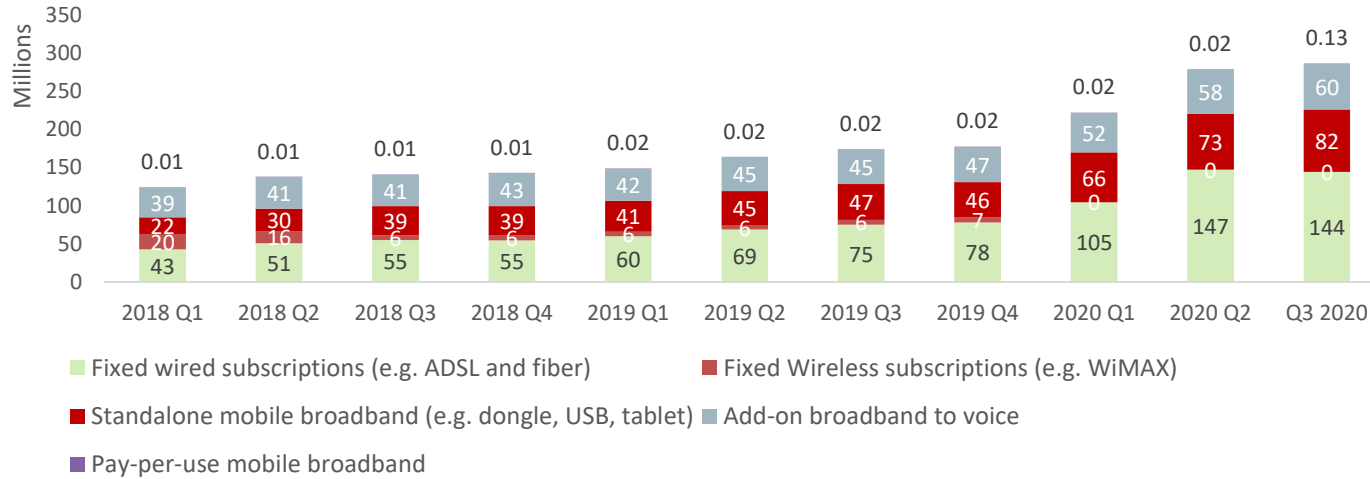
\*\* Standalone numbers have been revised from Q3 2019 as M2M subscribers have been removed from the total number.

# Broadband services: Data Traffic 1 of 2\*

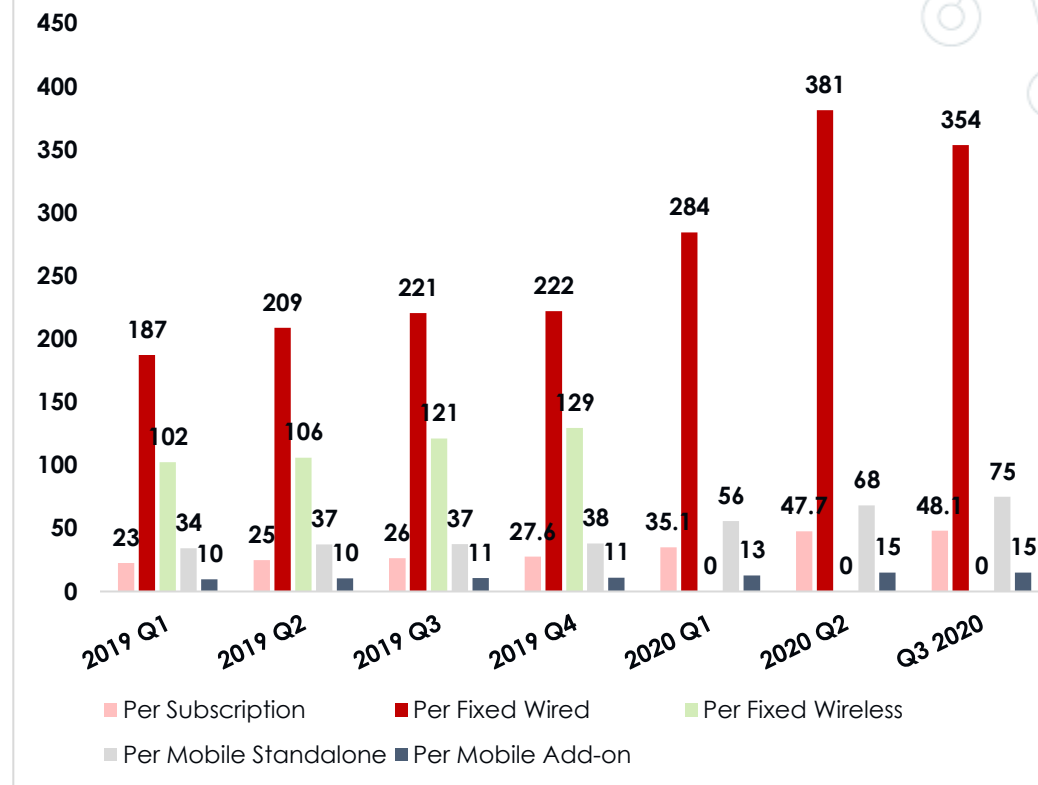


Total data traffic in Gigabyte

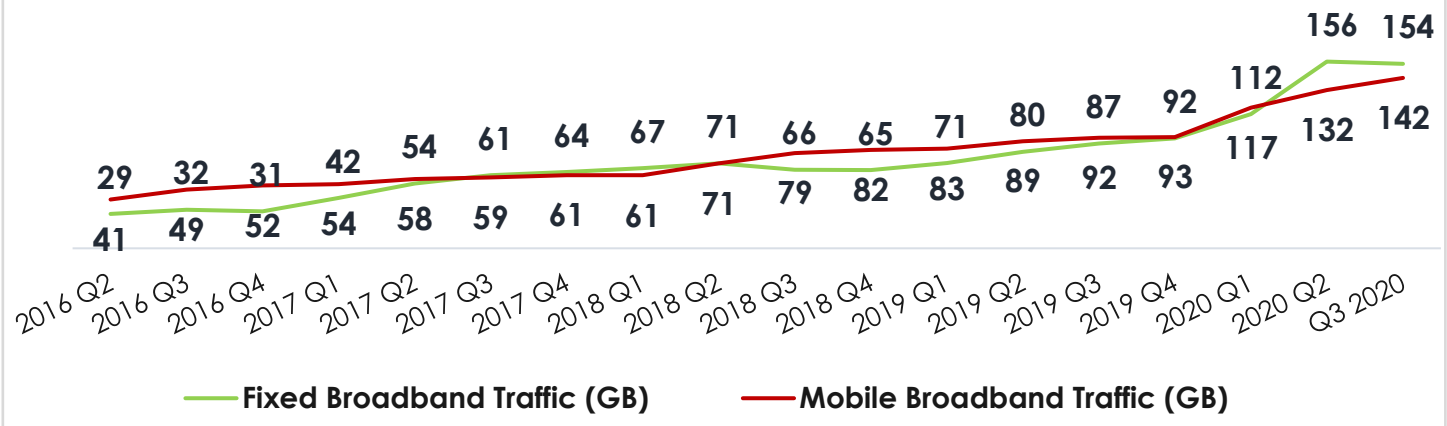
Traffic per technology\*



Monthly Average data consumption per subscription (Gigabyte)\*



Quarterly data consumption (Petabyte)

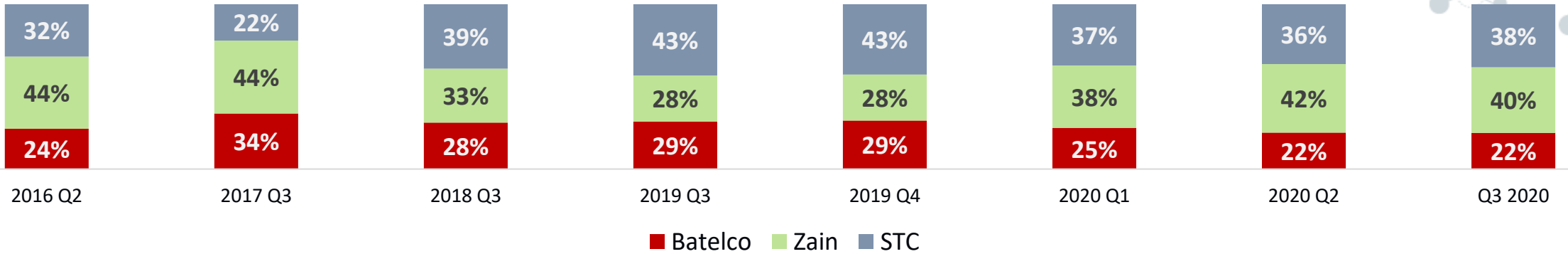


\*OLOs Fixed wireless traffic has been removed as it is currently under review. Changes will be reflected in the upcoming report.

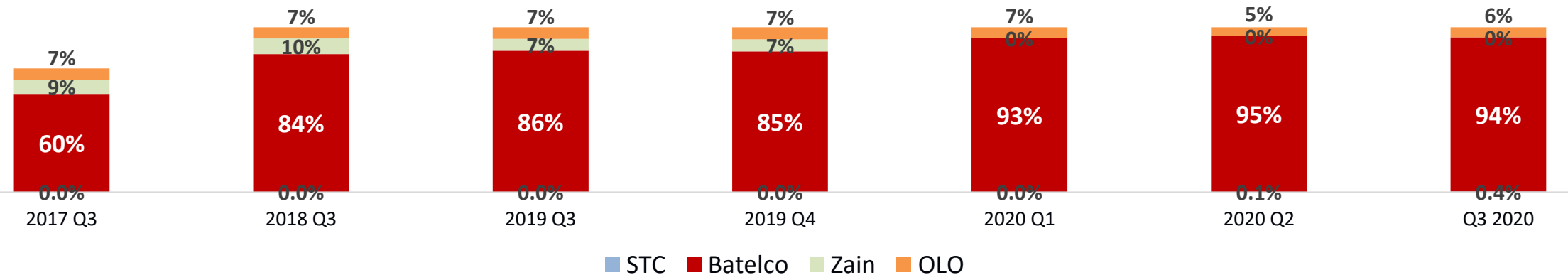
\*Fixed wired data traffic was revised from June 2018

# Broadband services: Data Traffic 2 of 2

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



## Fixed Broadband Traffic Market Share\*\*

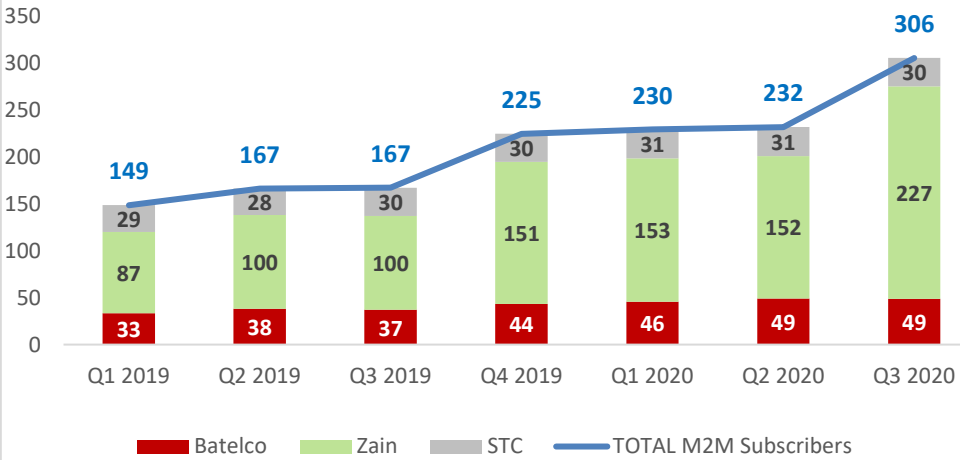


\*Fixed wired data traffic was revised from June 2018.

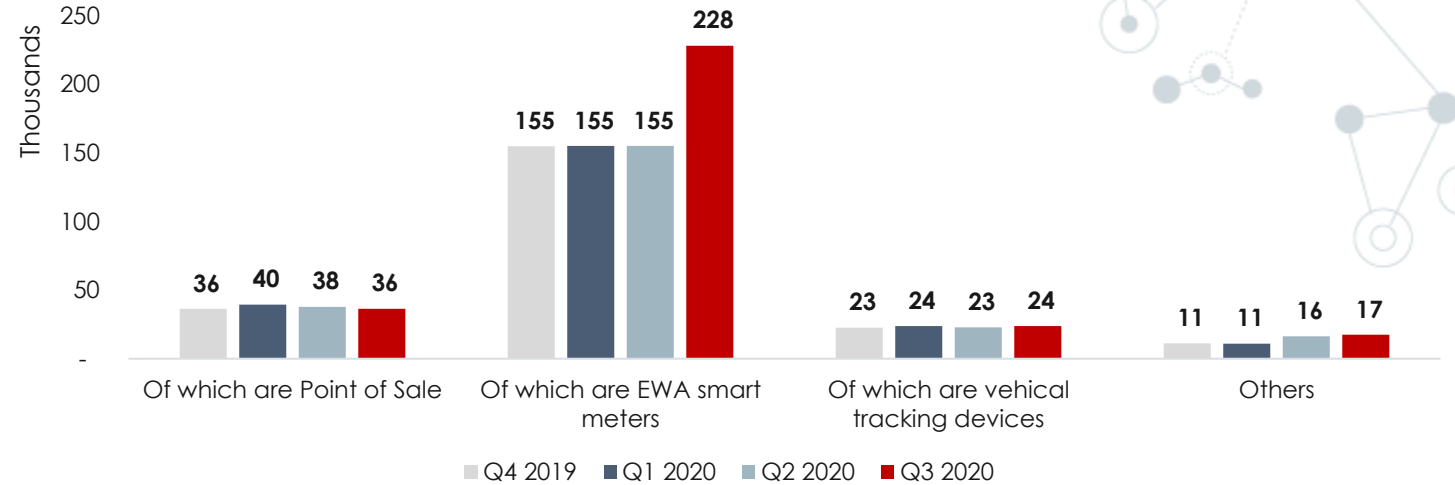
\*\*An operator's internet broadband services which are provided over TDD LTE network under Fixed Wireless have been included under Mobile Standalone as of 2020.

# M2M Subscribers & Traffic

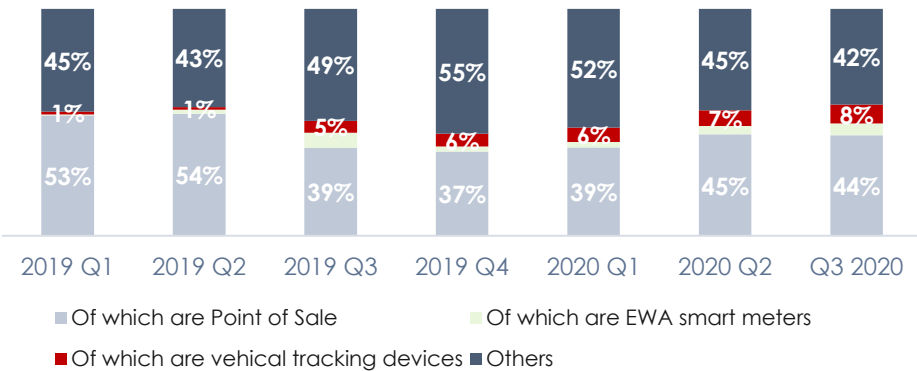
### M2M Subscribers (Thousands)



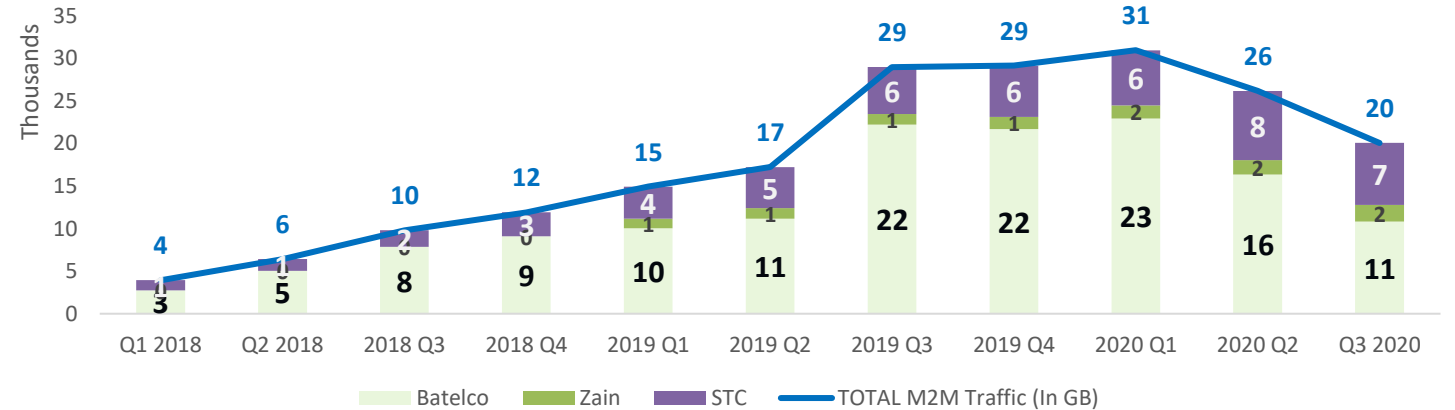
### M2M Subscribers by type



### 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 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

