Telecommunications Market Indicators in the Kingdom of Bahrain

Full year 2024 up to Q2 2025

Issued in **December 2025**

هيئة تنظيم الاتصالات
TELECOMMUNICATIONS REGULATORY AUTHORITY
Kingdom of Bahrain - مملكة البحرين

Content

Introduction → 03

Disclaimer → 04

Services offered by active operators → 05

Main telecoms indicators → 06

Revenues in the telecom sector → 07

Employment in the telecom sector → 08

Mobile services → 09

Broadband services → 17

Fixed telephony services → 25

International outgoing minutes → 31

Leased line services → 39

Mobile M2M Subscriptions → 45

Benchmarking → 46

Annex A → 50

Introduction

- The collection, analysis and dissemination of accurate and timely market information significantly enhances the design of effective, proportionate and efficient market regulation.

- The publication of this report is in accordance with Article 54 of the Telecommunications Law of Bahrain.

- Unless specified, the analysis presented in this report is based on data collected from licensed operators by TRA. TRA would like to thank licensed operators for the information provided and looks forward to their continued collaboration in the future.

- When publishing such information, TRA must have regard to the need to exclude any information which relates to the private affairs of a Person and information which, if published, would or might in the opinion of TRA seriously and prejudicially affect the interests of any Person. TRA has taken the necessary steps to ensure that it complies with the requirements of Article 54, including not publishing information which may be considered confidential information.

- This is the **Twentieth** Telecommunications Markets Indicators report which covers a large range of telecoms services indicators for **2024 up to Q2 2025** such as the number of subscribers, penetration rates, calls usage and telecoms revenues.

Disclaimer

- This report contains information collected by the Telecommunications Regulatory Authority in Bahrain in accordance with the provisions of the Telecommunications Law. This report fulfills the requirement to undertake research and publish information as set out in Article 54 of the Law. It also fulfills the requirements of Article 25 of the Law to provide information to the Regulator as set out in the Individual Licenses granted to the Operators mentioned in this report.

- This report is not a binding legal document and also does not contain legal, commercial, financial, technical or other advice.

- The Telecommunications Regulatory Authority in Bahrain 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 any particular purpose.

- The Telecommunications Regulatory Authority, 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.

- The Telecommunications Regulatory Authority is not bound by it, nor does it necessarily set out the Authority's final or definitive position on particular matters. To the extent that there might be any inconsistency between the contents of this document and the due exercise by it of its functions and powers, and the carrying out by it of its duties and the achievement of relevant objectives under law, such contents are without prejudice to the legal position of the Authority. Inappropriate reliance ought not therefore to be placed on the contents of this document.

Services Offered by Active Operators

هيئة تنظيم الاتصالات
TELECOMMUNICATIONS REGULATORY AUTHORITY
Kingdom of Bahrain - مملكة البحرين

Operator Name	National Fixed	International Calls	Mobile	Internet	Leased line	Other data service	Others
Batelco	✓	✓	✓	✓	✓	✓	
Bahrain Internet Exchange (BIX)	▪	▪	▪	▪	▪	✓	IP Transit –Peering – Colocation – IPLC, etc.
BNET							Services offered by BNET are on a wholesale level only.
BT Solutions LTD	▪	▪	▪	▪	✓	✓	
Equant Global Network - EGN BV		▪	▪	▪	✓	▪	IPVPN
Etisalcom Bahrain	✓	✓	▪	✓	✓	▪	MPLS
Gulf Electronic Tawasul	▪	▪	▪	▪	✓	▪	
Infonas	✓	✓	▪	✓	✓	✓	
Kalaam telecom	✓	✓	▪	✓	✓		
Northstar Technology	▪	✓	▪	✓	✓	▪	
Nuetel Communications	✓	✓	▪	✓	✓	✓	IPTV - ICT
Rapid telecoms	✓	✓	▪	✓	✓	✓	
STC Bahrain	✓	✓	✓	✓	✓		
Sita				▪	▪	✓	
Viacloud	✓	✓	▪	✓	✓	▪	
Vodafone Enterprise Bahrain						✓	IPVPN -Ethernet Wireline - Ethernet VPN
Zain Bahrain	✓	✓	✓	✓	✓	✓	
Zain Global Communications Services					✓		International transit voice services
Zajil	▪	▪	▪	▪	✓	▪	

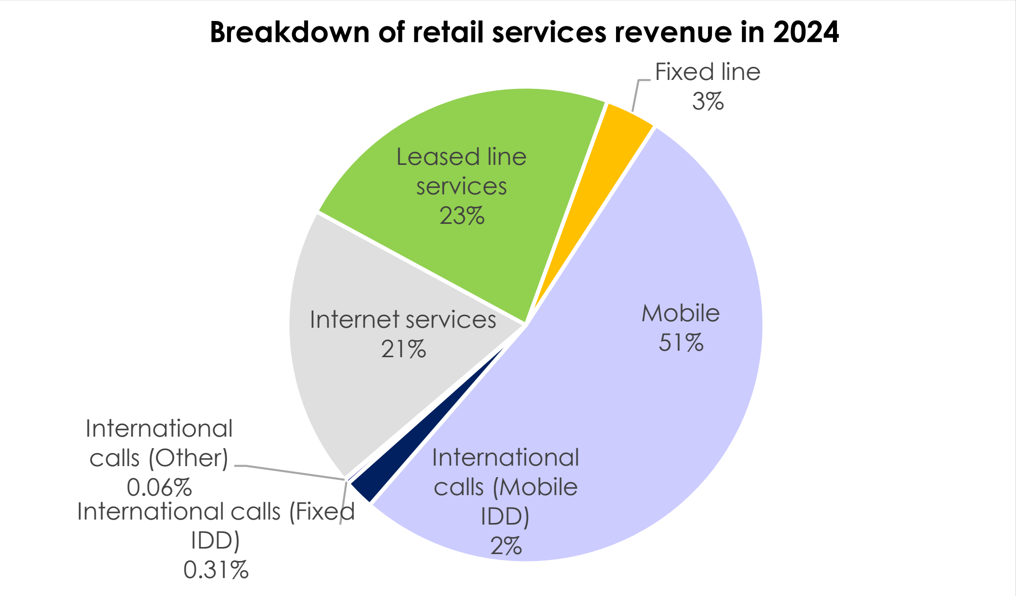
Main Telecom Indicators

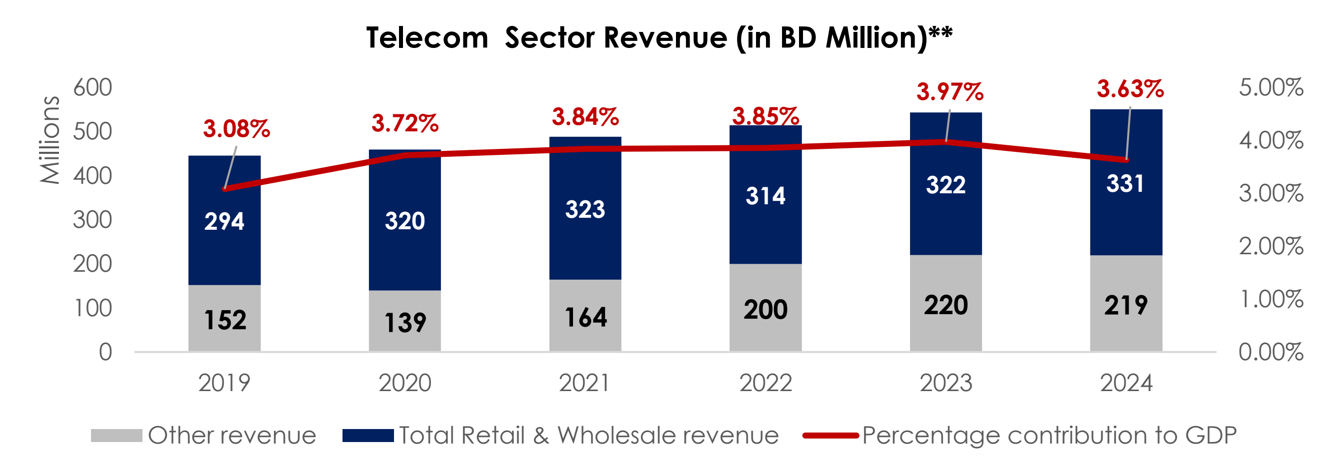
Indicator	2019	2020	2021	2022	2023	2024	CAGR 2019-2024
Number of fixed line telephony (excluding ISDN)	226,898	228,422	221,045	216,983	212,109	211,813	(1.37%)
Fixed line telephony penetration (including ISDN)	**18%**	**18%**	**17%**	**17%**	**17%**	**16%**	-
Total mobile subscribers	1,918,635	1,770,966	1,923,443	2,141,263	2,415,714	2,336,495	4%
Mobile penetration	**126%**	**117%**	**128%**	**138%**	**153%**	**147%**	-
Total broadband subscribers	2,152,692	2,012,253	2,145,530	2,494,834	2,518,203	2,615,778	3.97%
Broadband penetration	**143%**	**134%**	**143%**	**158%**	**159%**	**165%**	-
Fibre broadband subscriptions	104.539	134,756	144,583	165,422	170,176	179,614	11%
Fibre penetration per household	**46%**	**58%**	**64%**	**64%**	**60%**	**62%**	-
Percentage of individuals using the Internet	**99%**	**99.7%**	**100%**	**100%**	**100%**	**100%**	-
Telecommunications revenues (BD in million)	446	460	486	514	542	549	3.5%
Number of employees in the telecommunications sector	2,741	2,920	3,003	3,056	3,277	3,444	3.8%

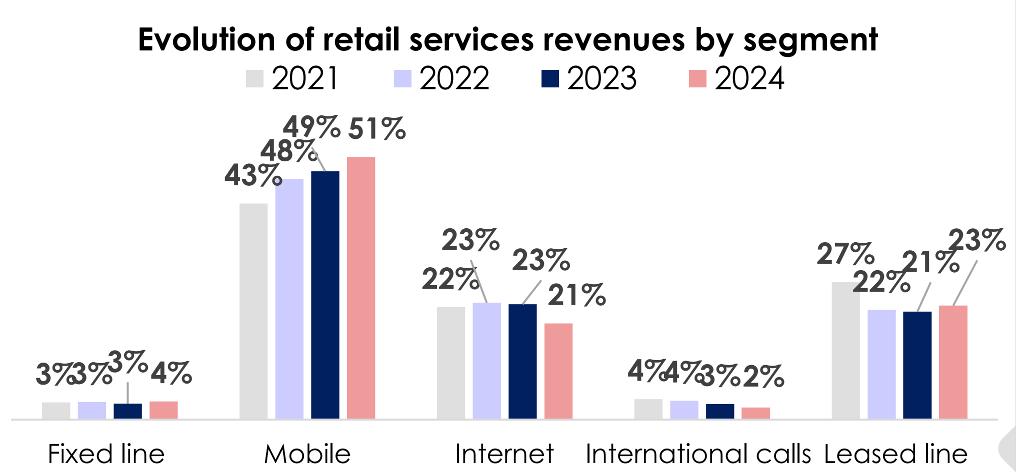
Notes:
1- The number of subscribers refers to the end of the period.
2- Number of broadband subscribers include fixed wired, wireless and mobile. Slight drop in total broadband is due to an operator reporting a drop in Standalone mobile broadband in 2023.
3- The source of Percentage of individuals using the Internet is the ITU and TRA residential survey.
4- Penetration is based on mid-year population estimated by GIA

Revenues in the Telecom Sector

- Telecommunications services generated **BD 549 million*** in revenue in 2024 compared to BD 542 million in 2023, an increase of **1%**.
- Telecommunications sector revenues represent around **3.63%** of GDP as of 2024.
- The proportion of mobile revenue to total retail revenue increased to **51%** in 2024, compared to **49%** in 2023.
- Between 2023 and 2024 total retail revenue remained someone stable while reported wholesale revenue increased by **7%**. Other revenue increased by **3%** over the same period.
- Revenue from leased line services increased by **16.5%** while internet services revenue increased by **18%** between 2019-2024.
- Telecommunications sector revenue increased by **23%** between 2019-2024.







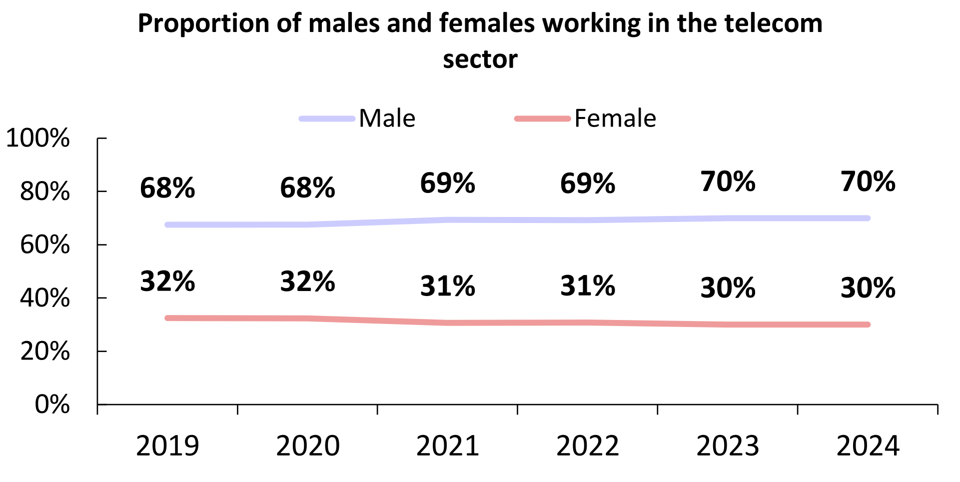
** Other revenue includes but is not limited to (Hardware revenues, ICT, advanced services, etc..)*
*** Includes BNET revenue.*
**** Source: IGA*

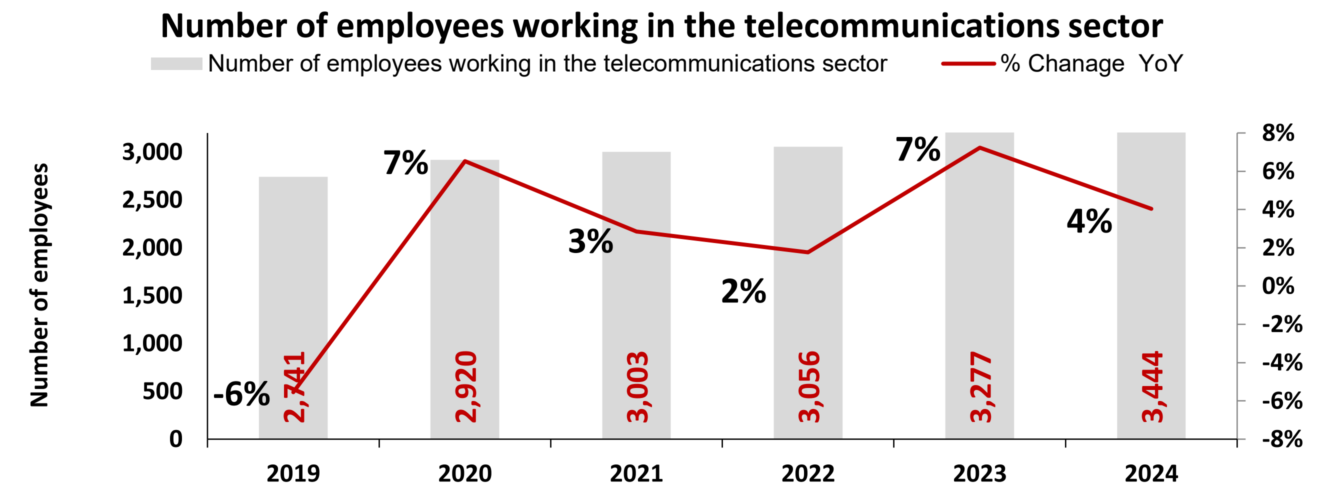
GDP (in BHD million)***	2022	2023	2024
	13,341.97	13,661.22	15,138.20

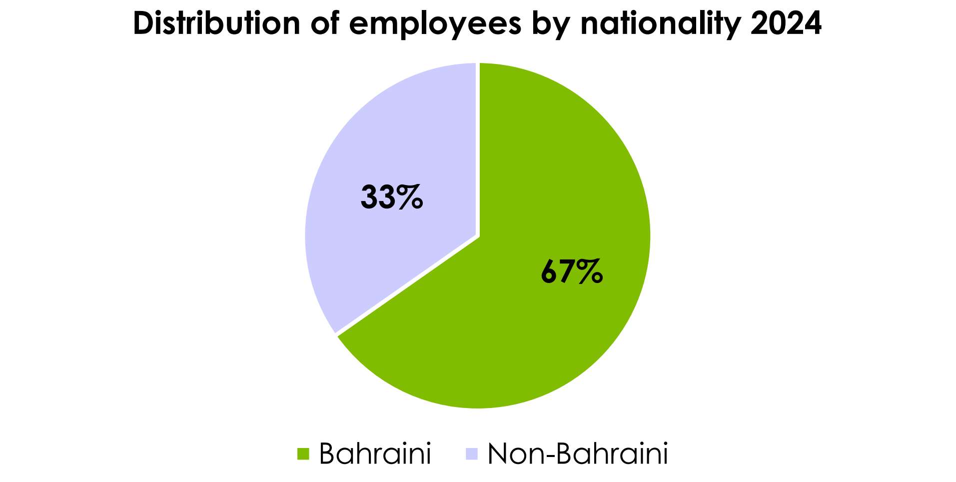
Employment in the Telecom Sector

هيئة تنظيم الاتصالات
TELECOMMUNICATIONS REGULATORY AUTHORITY
Kingdom of Bahrain - مملكة البحرين

- 3,444 employees are working in the telecommunications sector as of 2024.
- The sector achieves high degree of Bahrainisation. As of 2024, 67% of the employees in the sector are Bahrainis.
- Females represent 30% of employees in the telecom sector, with 18% of females occupying executive or managerial positions.







MOBILE SERVICES

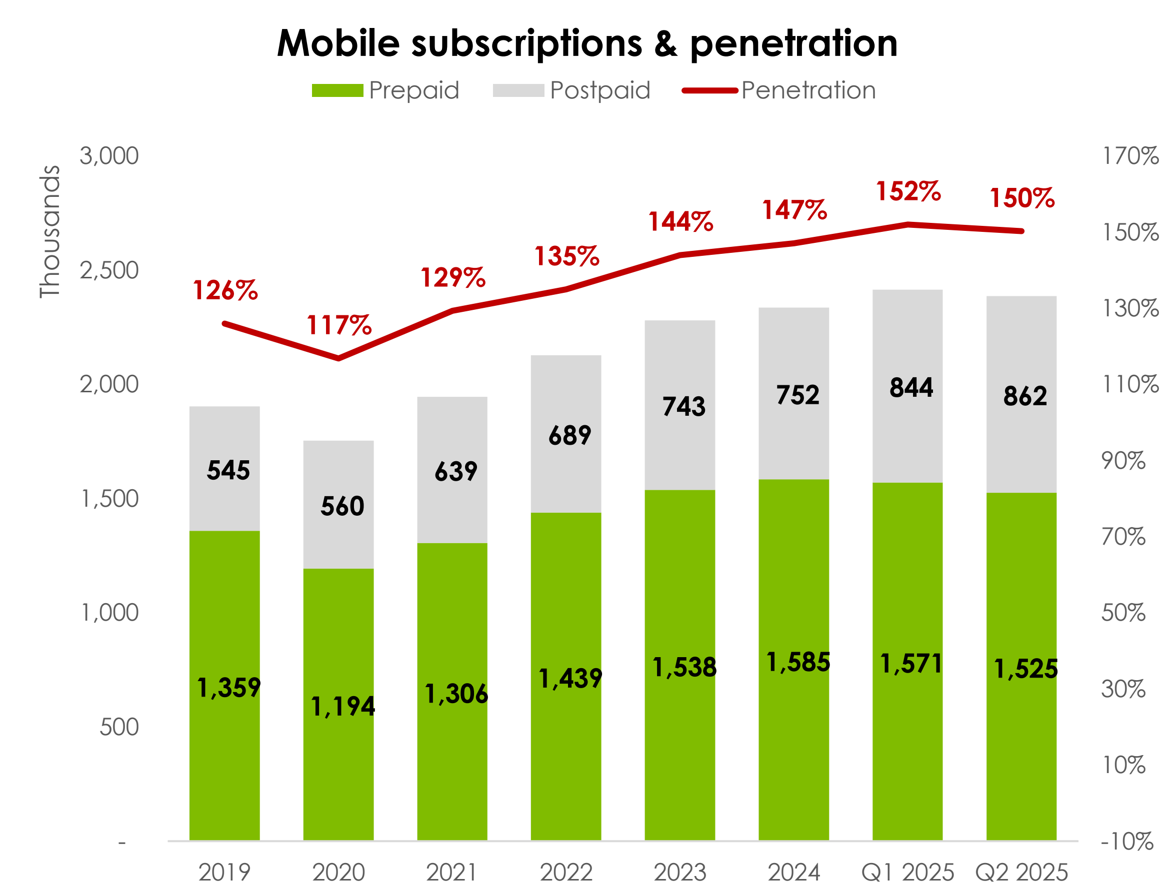
Mobile Services*

هيئة تنظيم الاتصالات
TELECOMMUNICATIONS REGULATORY AUTHORITY
Kingdom of Bahrain - مملكة البحرين

- By the end of 2024, the number of total mobile subscriptions dropped by **3%** relative to 2023.
- By Q2 2025, the number of mobile subscriptions increased by **2%** relative to 2024.
- Postpaid subscribers dropped by **12%** between 2023-2024 while prepaid subscribers increased by **1%** over the same period.

End of Q2 2025		
	2,386,723	Number of total mobile subscriptions
	150%	Penetration rate

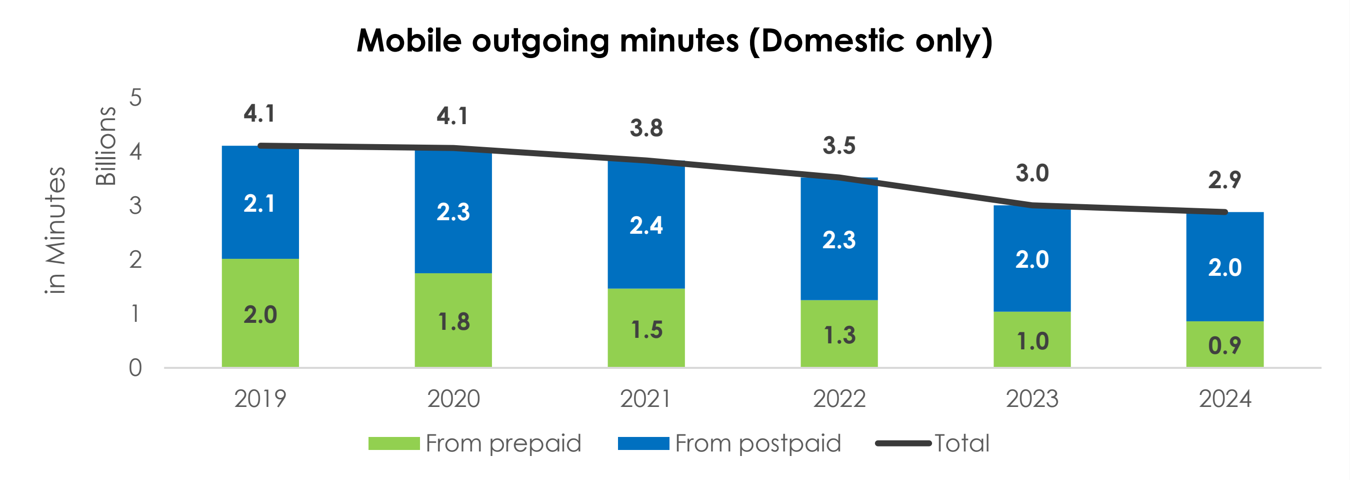
	2020	2021	2022	2023	2024	Q2 2025
Total	**1,754,109**	**1,923,443**	**2,141,263**	**2,415,714**	**2,336,495**	**2,386,723**
% of Prepaid	67%	68%	67%	65%	68%	64%
% of Postpaid	33%	32%	33%	35%	32%	36%

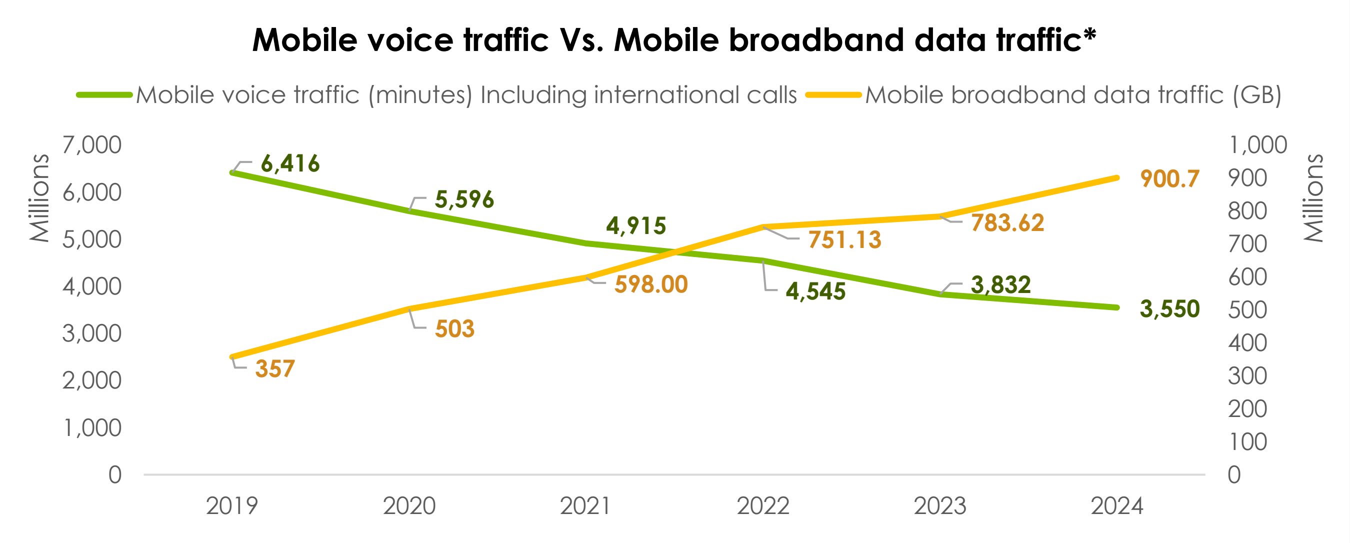


* Drop in postpaid subscriptions is due to the reclassification of voice-activated subscriptions to Standalone mobile broadband. Numbers were amended for the period from 2022 onwards.

Mobile Traffic

- At the end of 2024, mobile generated 2.9 billion domestic minutes, representing a 4% drop compared to the previous year.
- The compound annual growth rate is -6.8% in domestic mobile originated traffic between 2019 and 2024.
- In 2024 domestic postpaid mobile outgoing minutes increased by 3%, while the traffic originated from prepaid decreased by 17% in comparison to 2023.
- While total mobile voice traffic (including international calls) decreased by 7%, data traffic increased by 15% between 2023 and 2024.

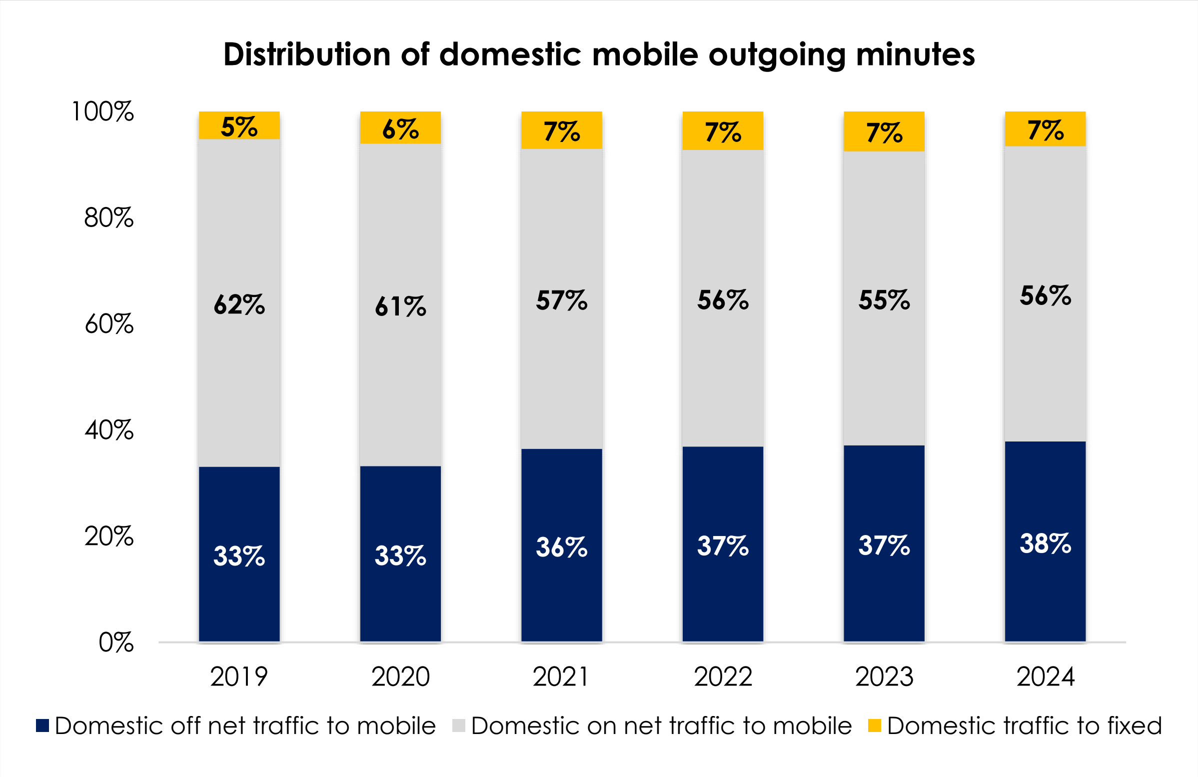


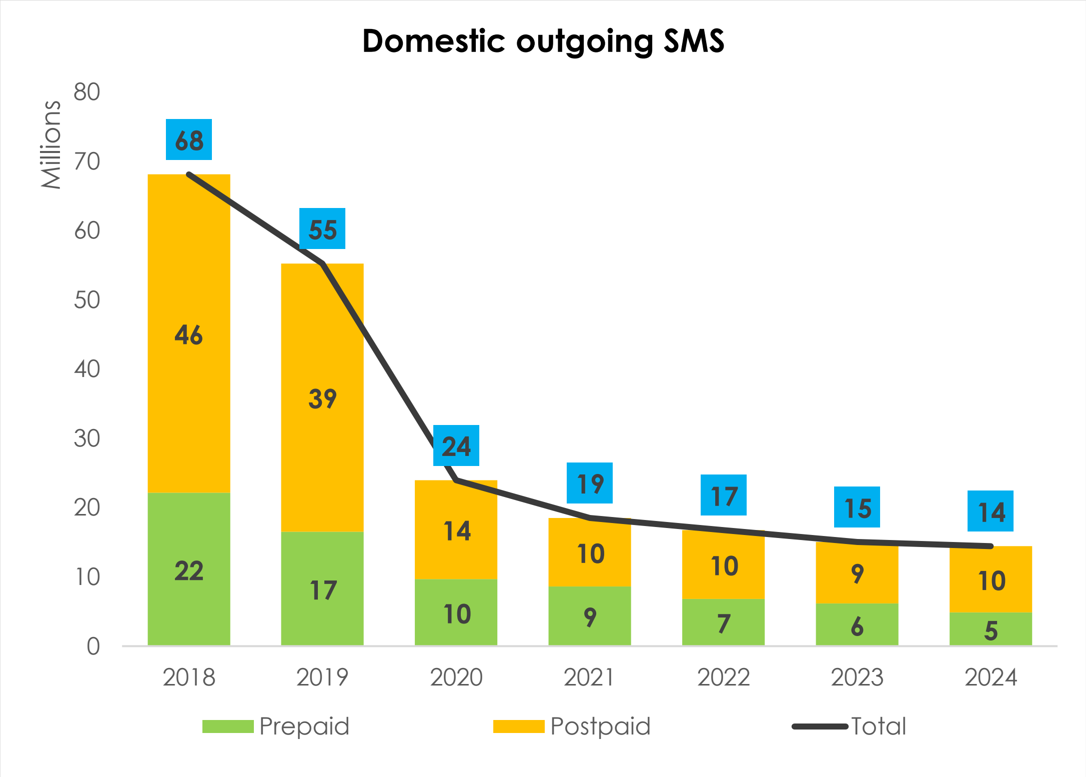


*Data traffic is used for all Internet activities

Mobile Traffic

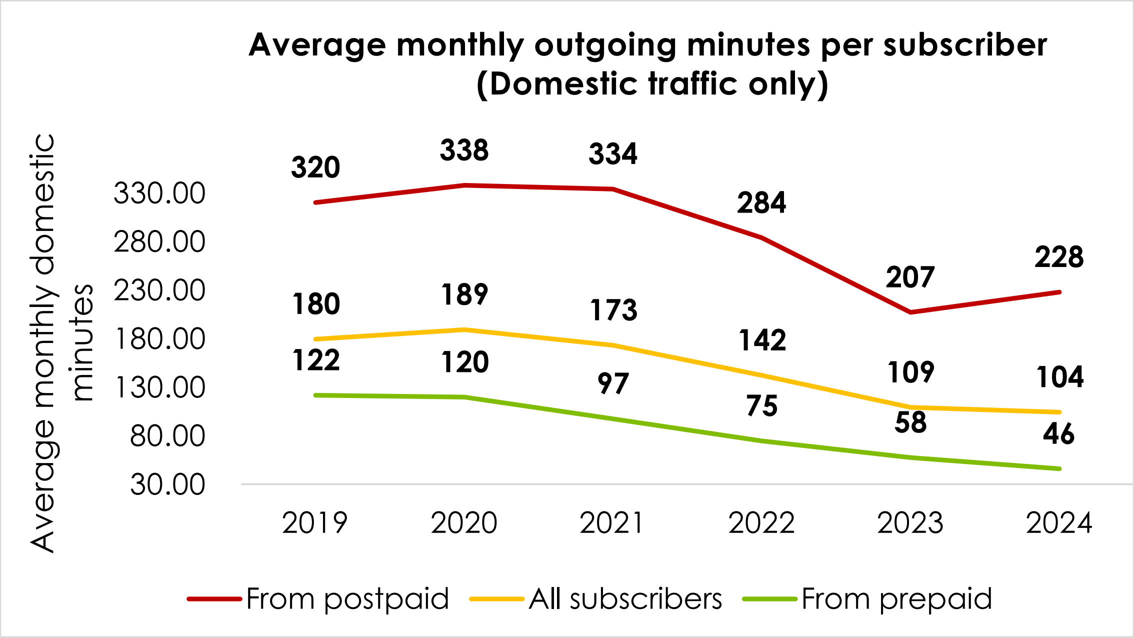
هيئة تنظيم الاتصالات
TELECOMMUNICATIONS REGULATORY AUTHORITY
Kingdom of Bahrain - مملكة البحرين

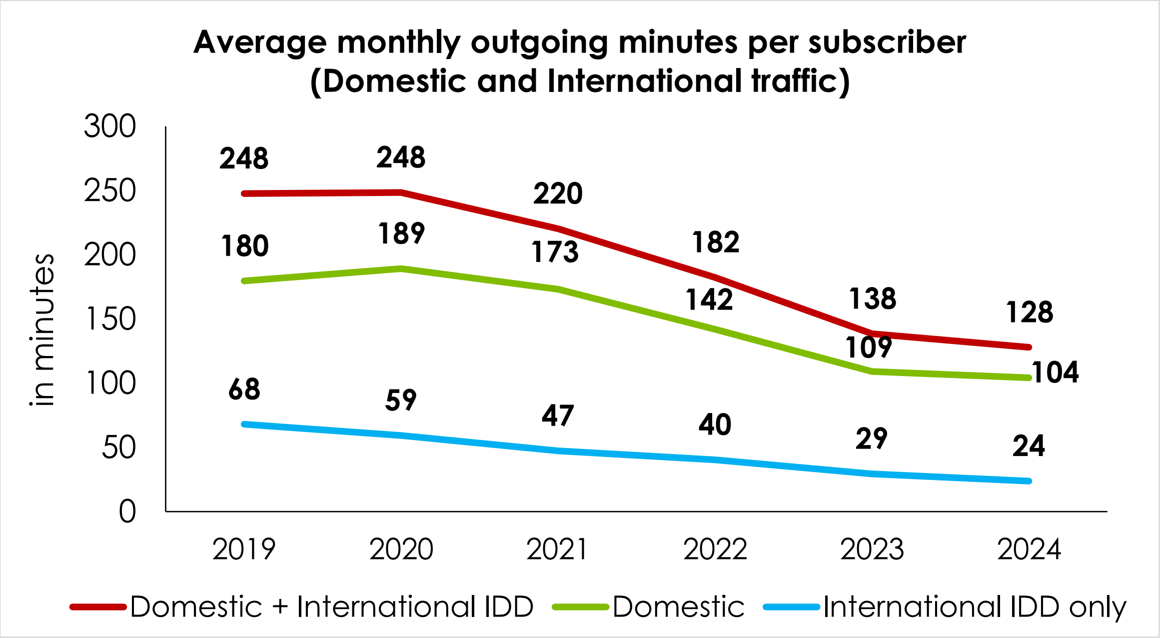




- In 2024, domestic mobile originated on-net traffic dropped by 3.7% relative to the previous year.
- In 2024, domestic mobile originated off-net voice traffic dropped by 2% relative to the previous year.

Mobile Average Monthly Outgoing Minutes

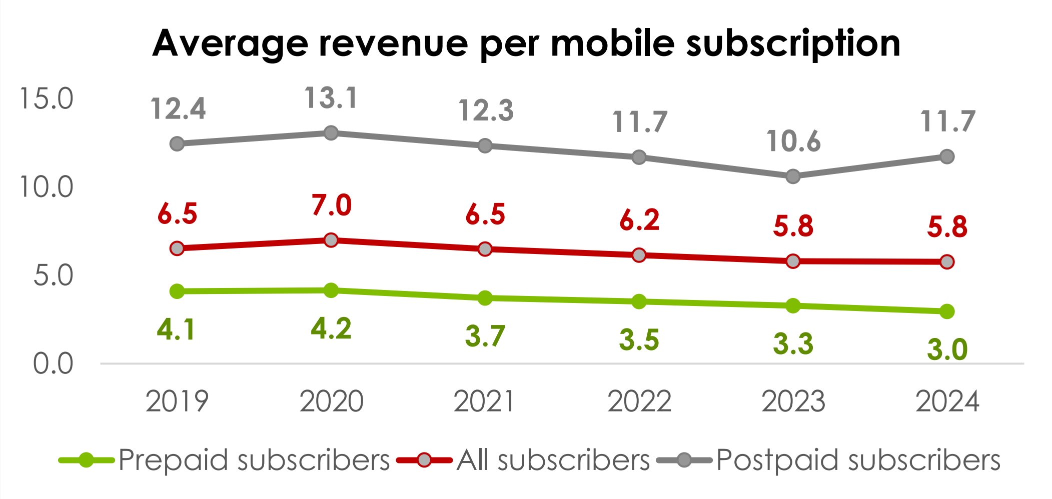


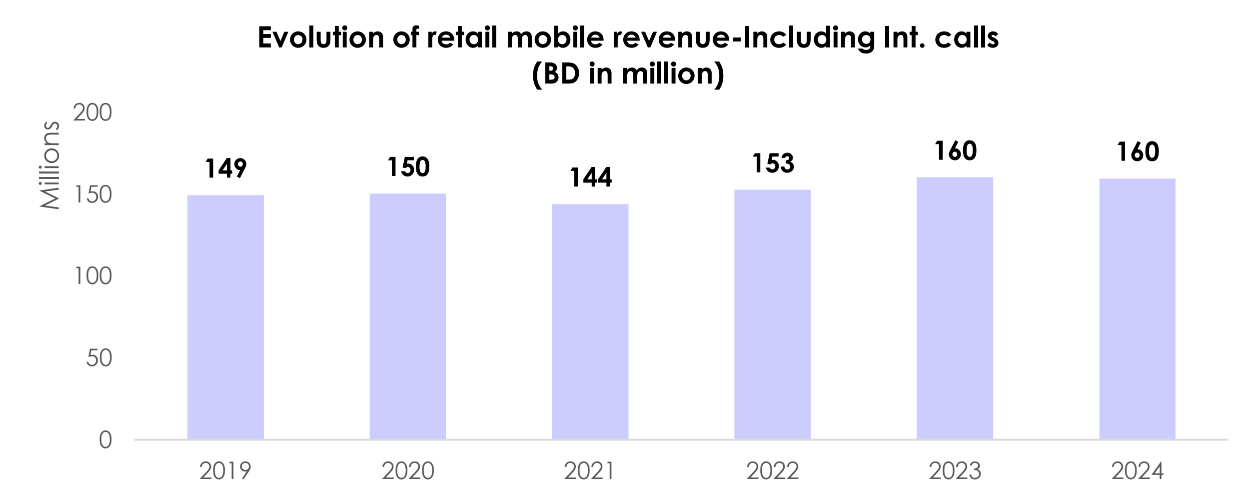


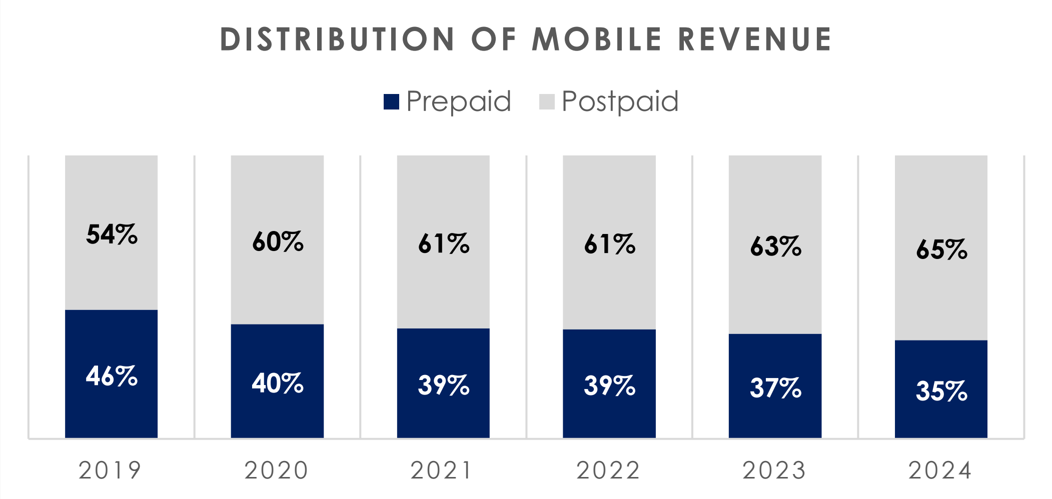
- As demonstrated above, the average monthly domestic traffic (in minutes) for postpaid subscribers increased from 207 minutes in 2023 to 228 minutes in 2024, a 10% increase relative to the previous year.
- The average monthly domestic traffic (in minutes) for prepaid customers dropped from 58 minutes in 2023 to 46 minutes in 2024 , a 21% drop relative to the previous year.
- The average monthly volume of international direct dial (IDD) calls remained stable at 29 minutes in 2024.

Mobile Revenue

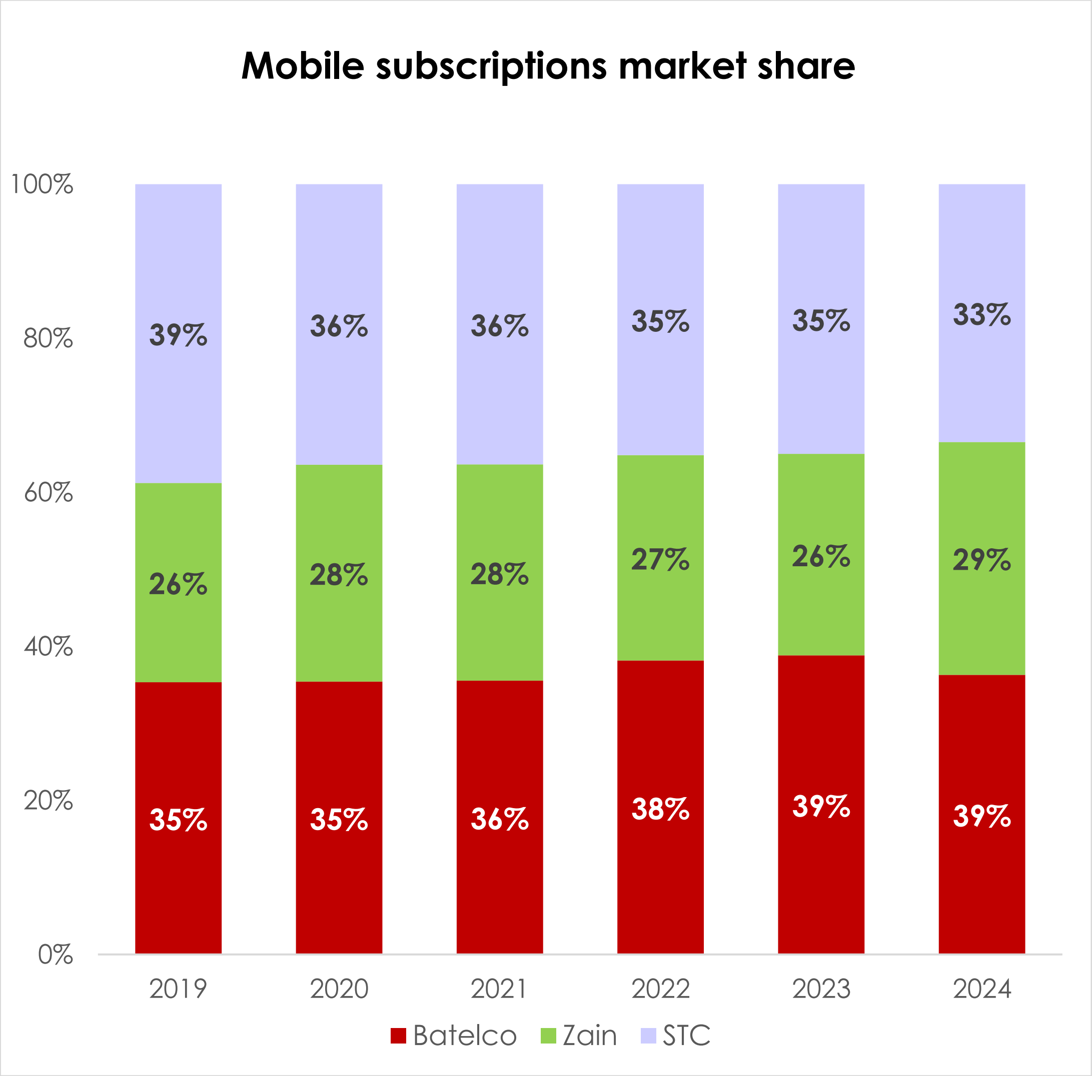
- Between 2023 and 2024, Mobile revenue slightly dropped by **0.3%** to reach **BHD 159.6 Million**.
- Revenue generated from postpaid mobile subscriptions increased from **BHD 100 Million** to **BHD 103 Million** between 2023 to 2024.
- ARPU for postpaid subscribers increased by **10.5%** relative to 2023 while prepaid ARPU dropped by **10%** over the same period. Overall, Mobile ARPU dropped by less than **1%** over the same period.

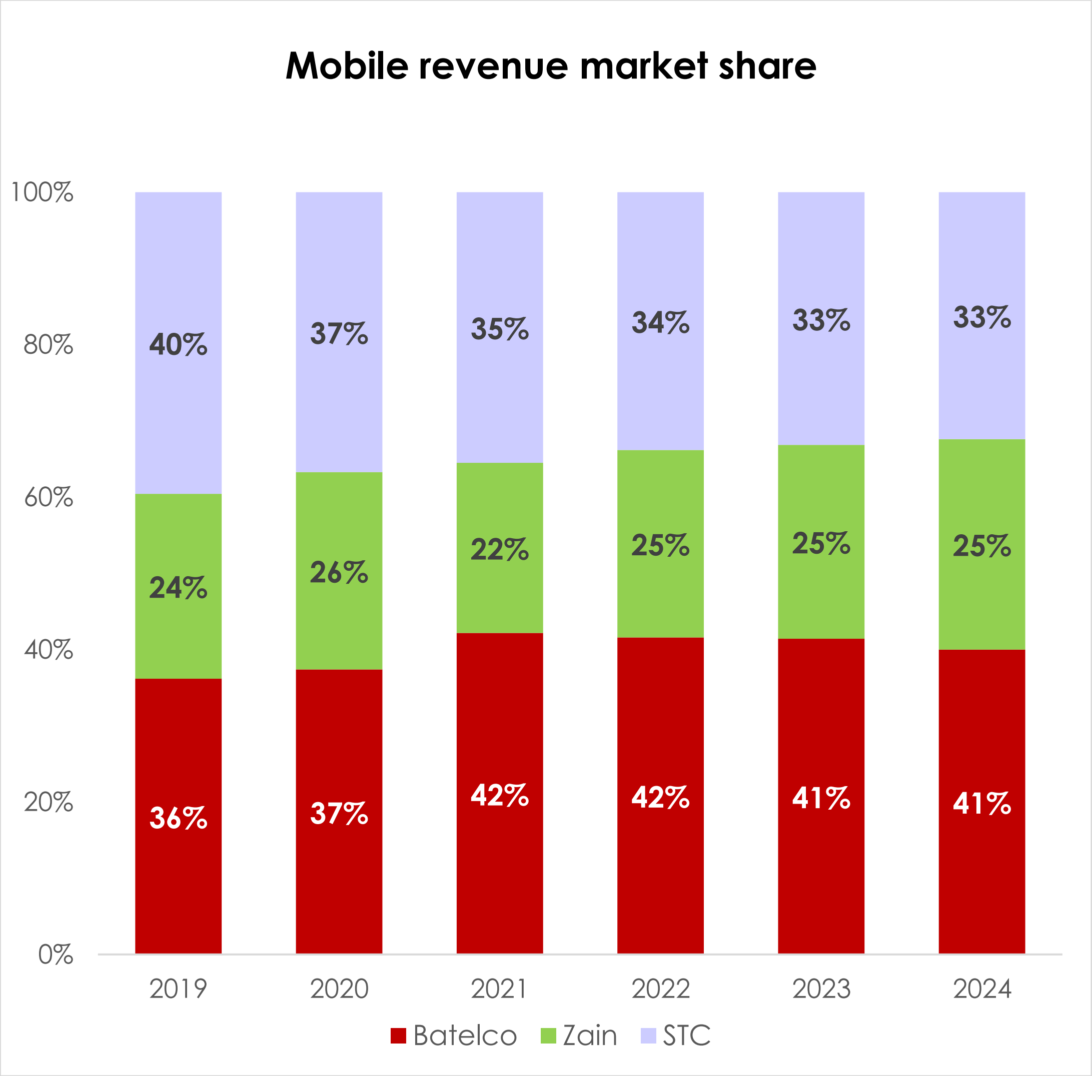




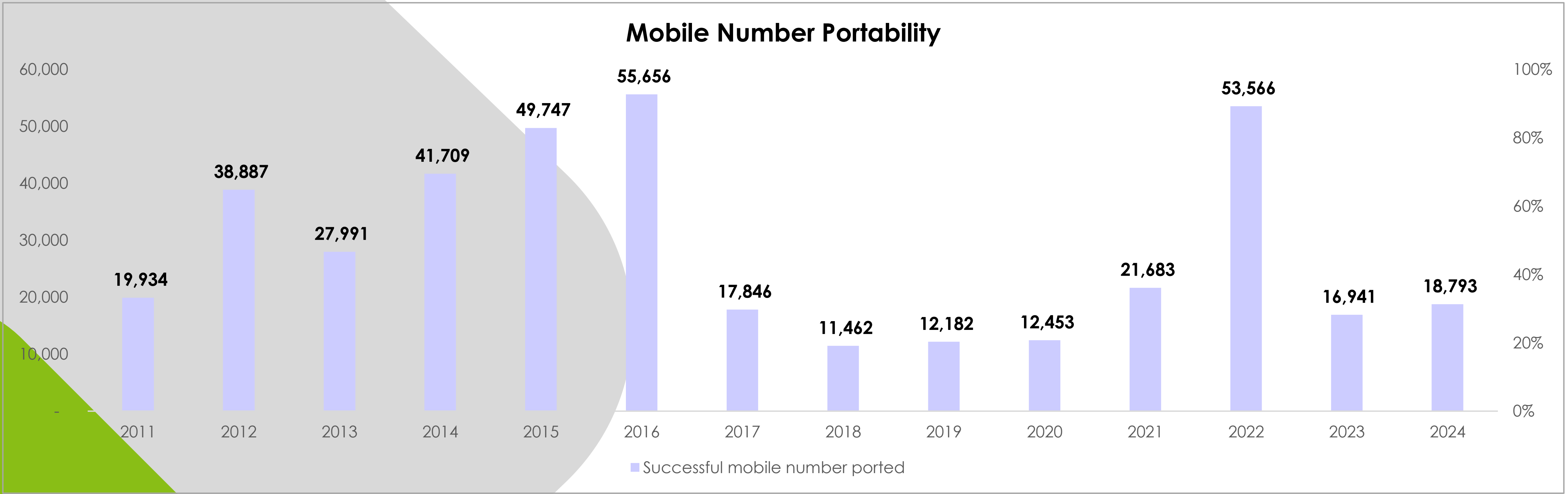


Mobile subscriptions and revenue market shares





Mobile Number Portability



- The volume of mobile numbers successfully ported increased compared to 2023. By end of 2024, total successful mobile numbers ported were 18,793.

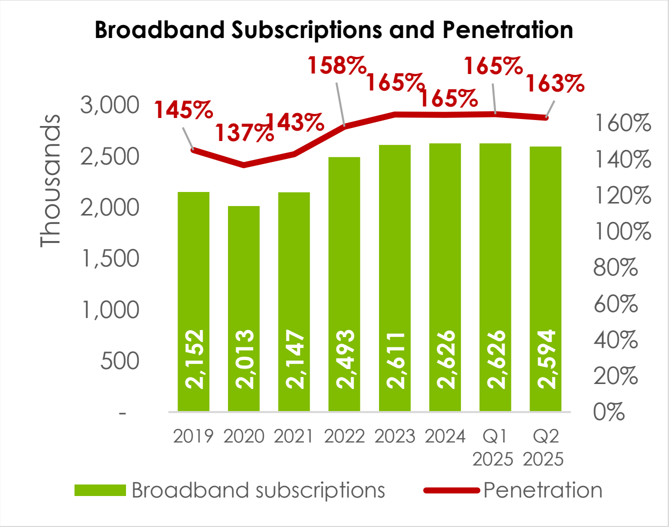
- A total of approximately 398,850 mobile numbers had been ported successfully since the introduction of number portability in 2011.

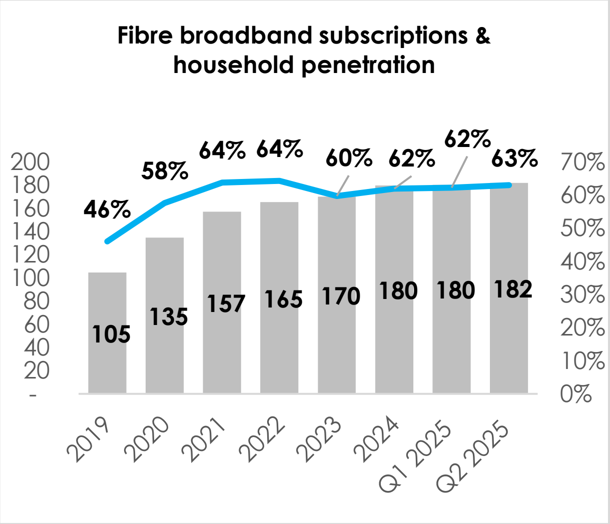
BROADBAND SERVICES

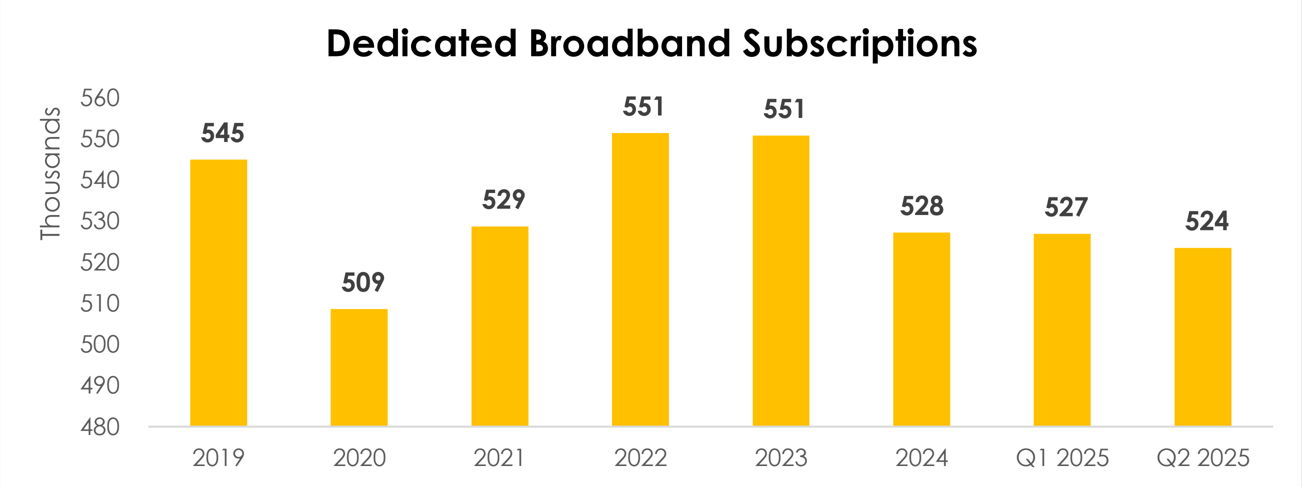
Broadband Services*

- The total broadband market shows a positive increase in terms of both mobile and fixed broadband services, with the penetration rate being **163%** as of **Q2 2025**.
- Looking at the evolution of the fibre broadband market, it shows significant growth since 2019, with subscriptions growing year on year to reach around **182,000** subscriptions as of Q2 2025. Penetration per household is **63%** for the same period.
- By Q2 2025, there were around **524,000** subscriptions for dedicated broadband services.

End of Q2 2025		
	2,594,712	**Broadband subscription**
	163%	**Penetration rate**





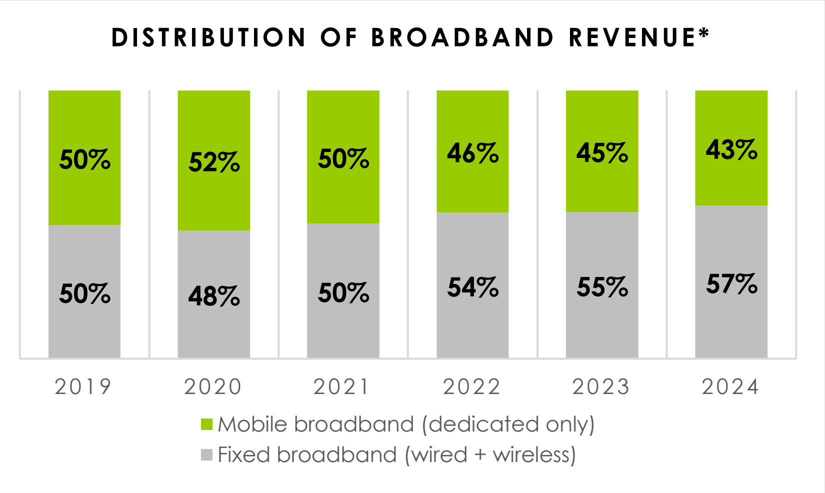


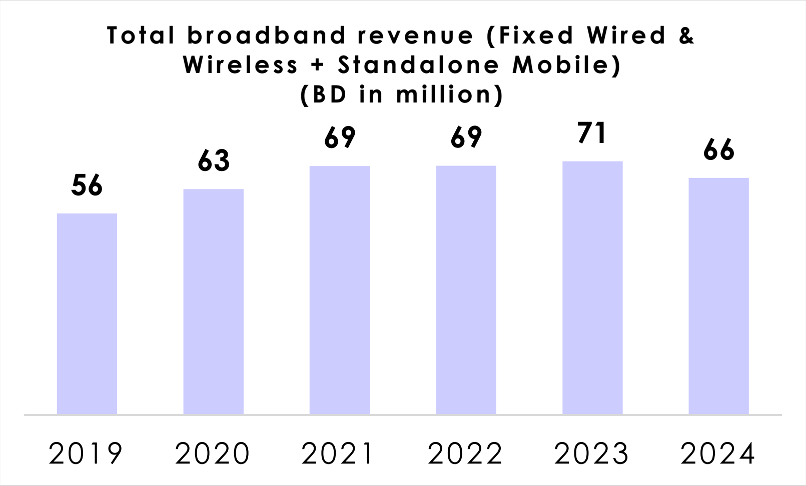
# of Households** By IGA	2019	2020	2021	2022	2023	2024/2025
	239,750	245,983	257,268	257,268	285,024	285,024

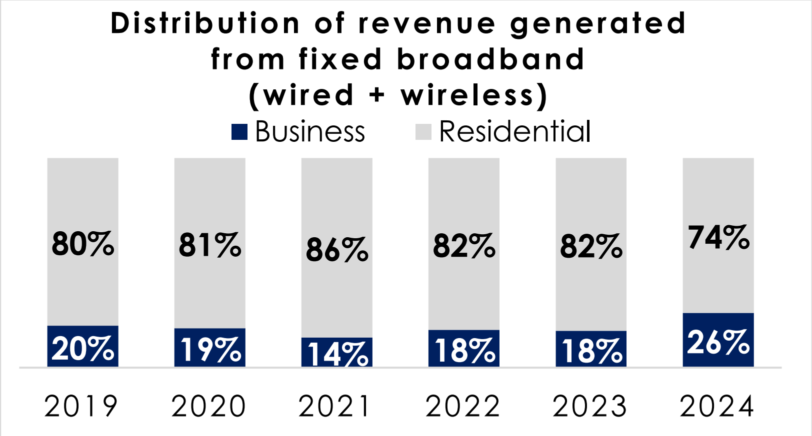
** Fixed-wired subscriptions include DSL and fibre subscriptions.*
*** Source: IGA*

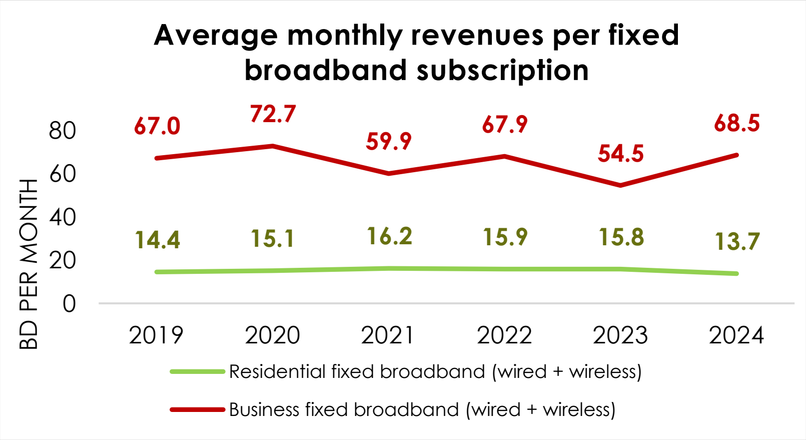
Broadband Revenue

- Broadband revenues dropped by 6.5% to reach 66 million BD at the end of 2024, with a slight redistribution between residential and business fixed broadband revenue.
- Revenue generated from mobile broadband represented 43% of total broadband revenue in 2024 relative to 45% in 2023.
- Revenue generated from business fixed broadband represented 26% of total fixed broadband revenue in 2024.
- The average revenue per subscription for residential fixed broadband dropped by 13% over the last year, reaching BD 13.7 in 2024. However, the average revenue per subscription for business broadband has increased by 26% to reach BD 68.5 in 2024.





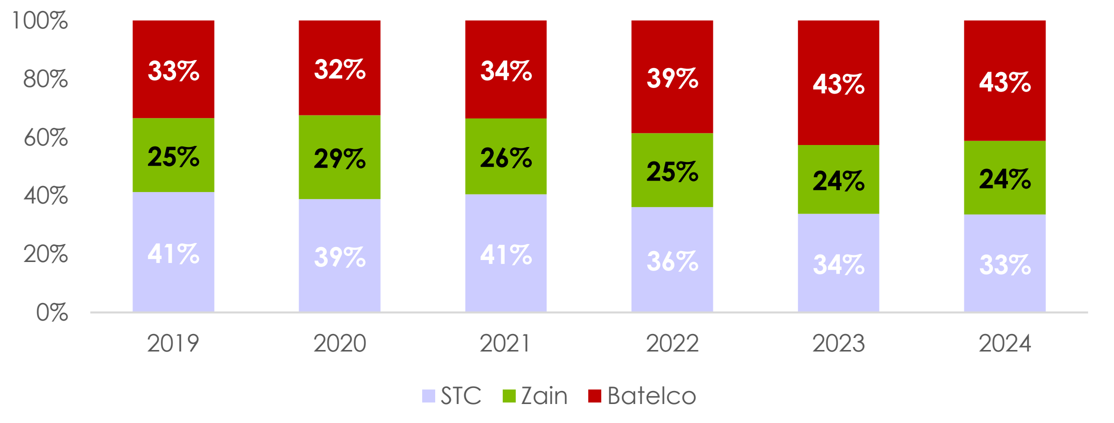




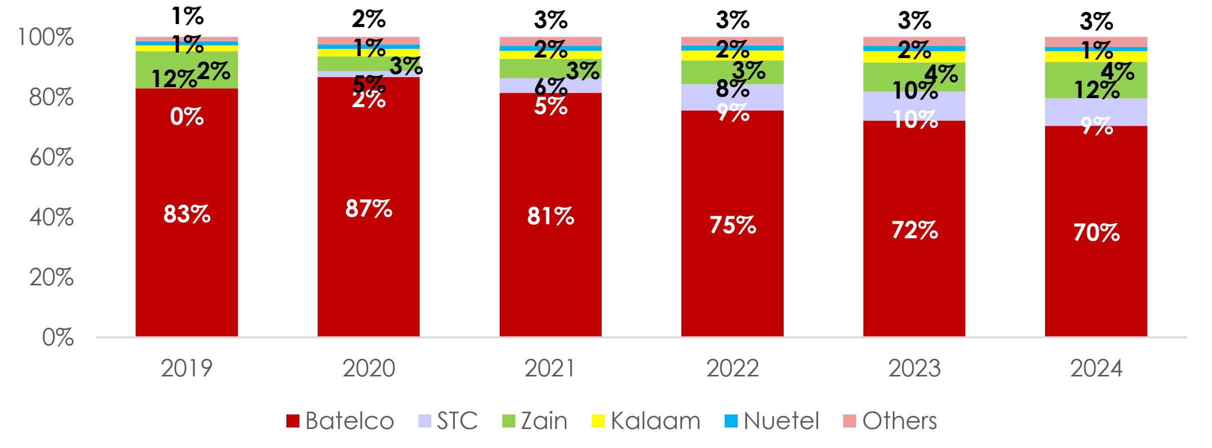
*The shift in the distribution of broadband revenue is due to higher fiber take-up as of 2021.

Broadband subscriptions and revenue market shares

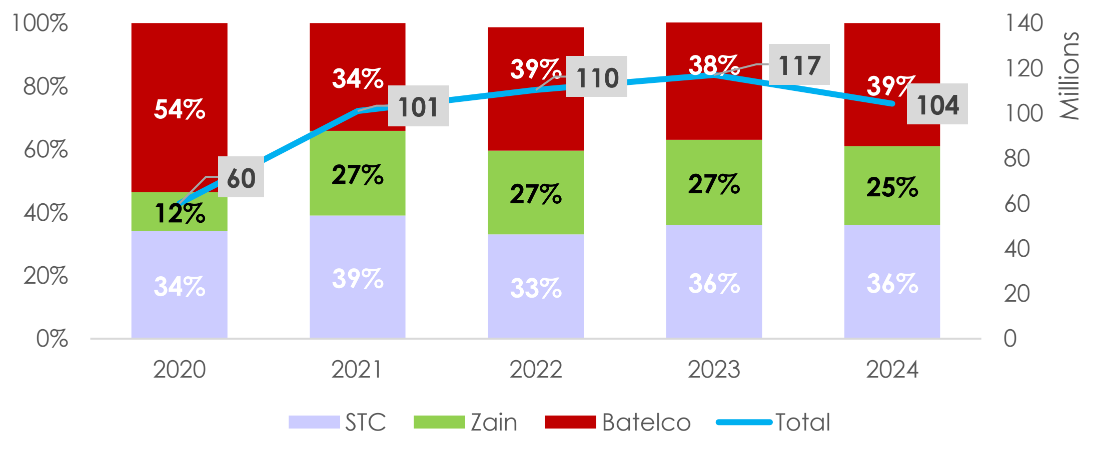
Total Mobile broadband subscriptions market shares (Including Standalone + Add-On+ Pay-Per-Use)



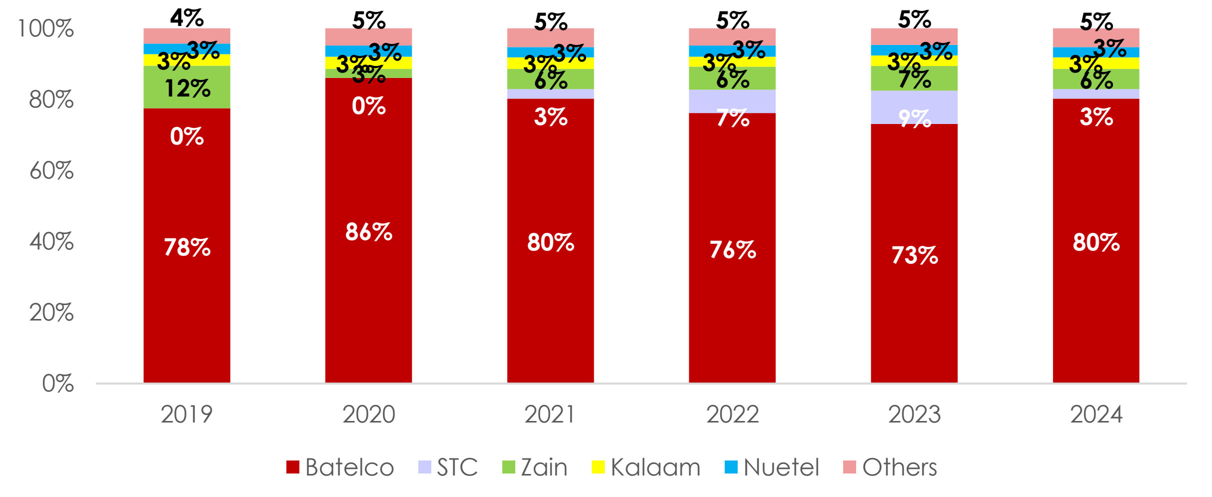
Fixed broadband subscriptions market shares



Total Mobile broadband revenue market shares (Including Standlalone+Add-On+ Pay-Per-Use)

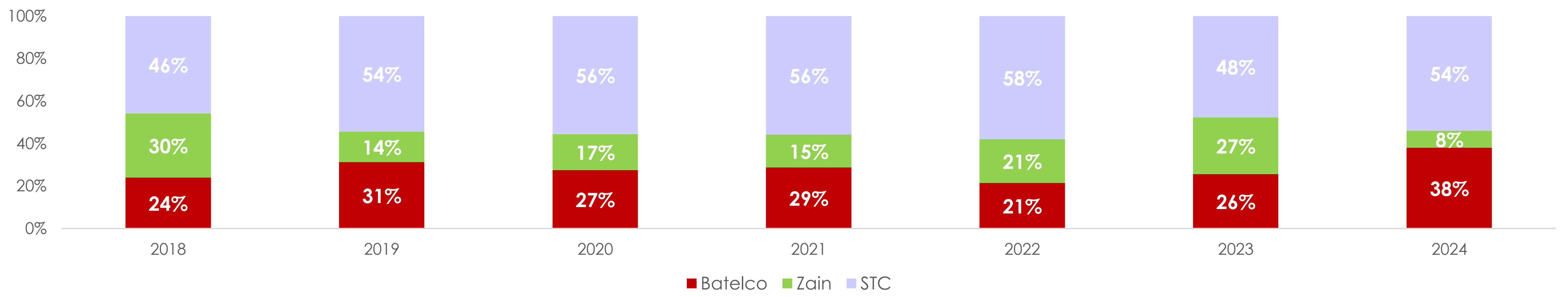


Fixed broadband revenue market shares

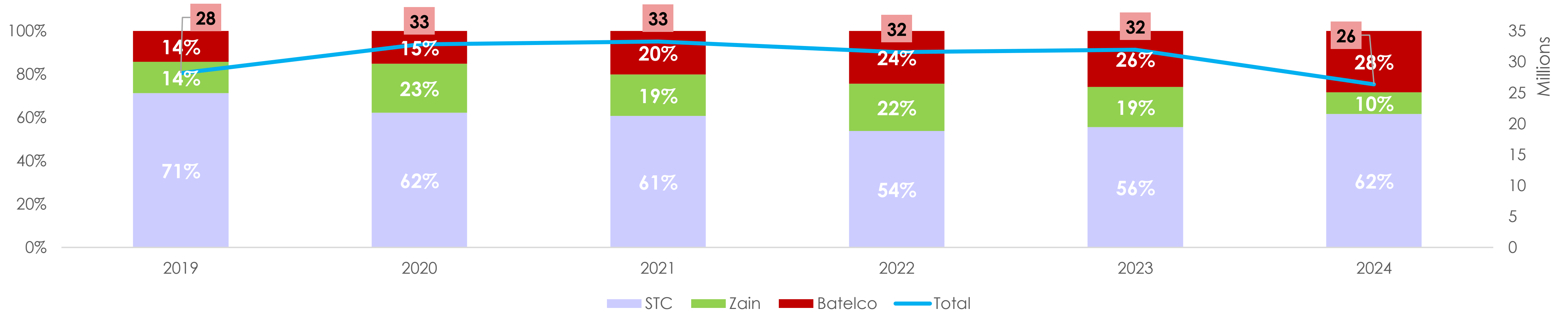


Broadband subscriptions and revenue market shares

Mobile Standalone broadband subscriptions market shares



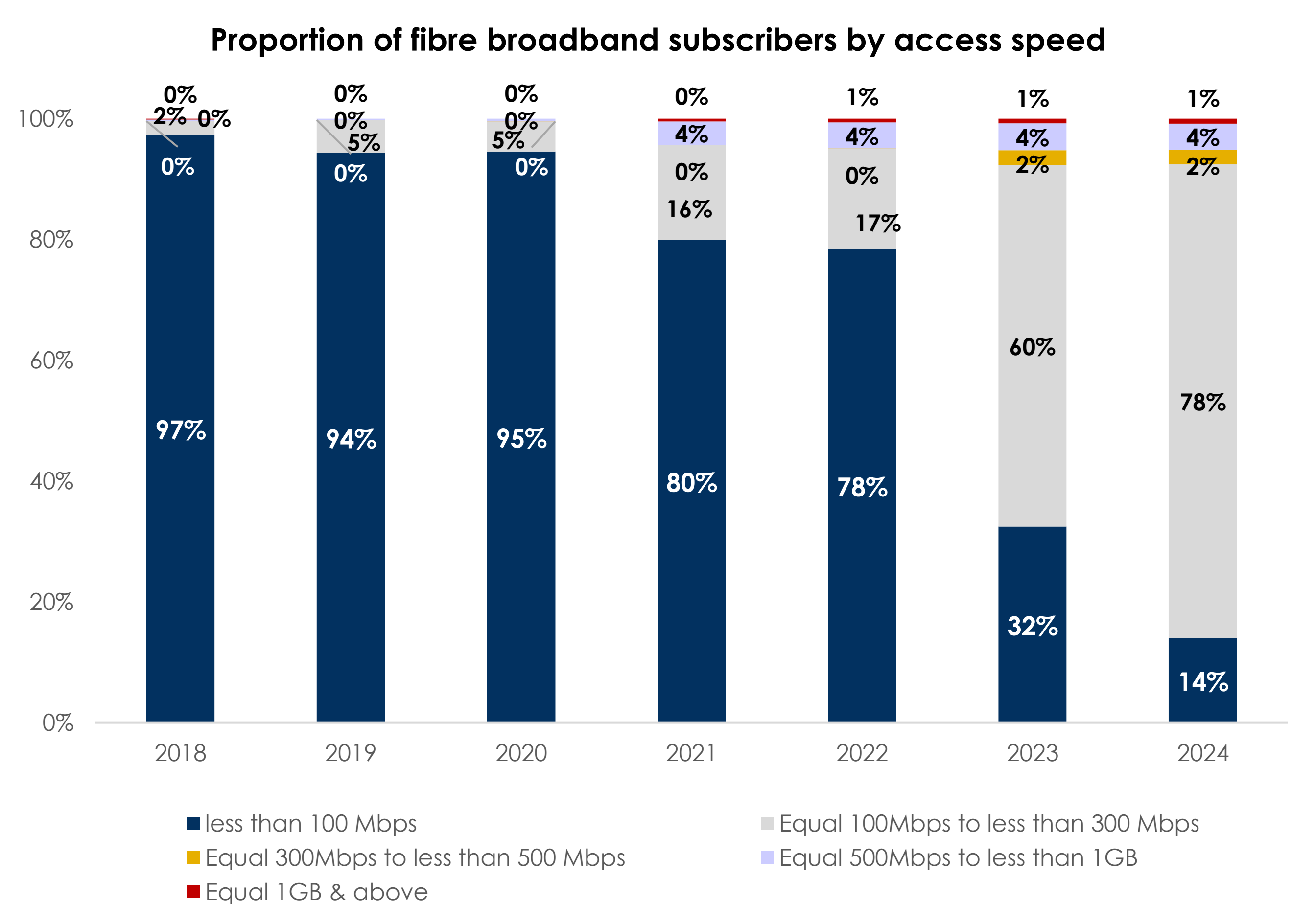
Mobile Standalone broadband revenue market shares



Proportion of Fibre Broadband Subscribers by Access Speed

- In 2024, **86%** of subscribers opted for fibre broadband packages with speed equal to 100Mbps or more.

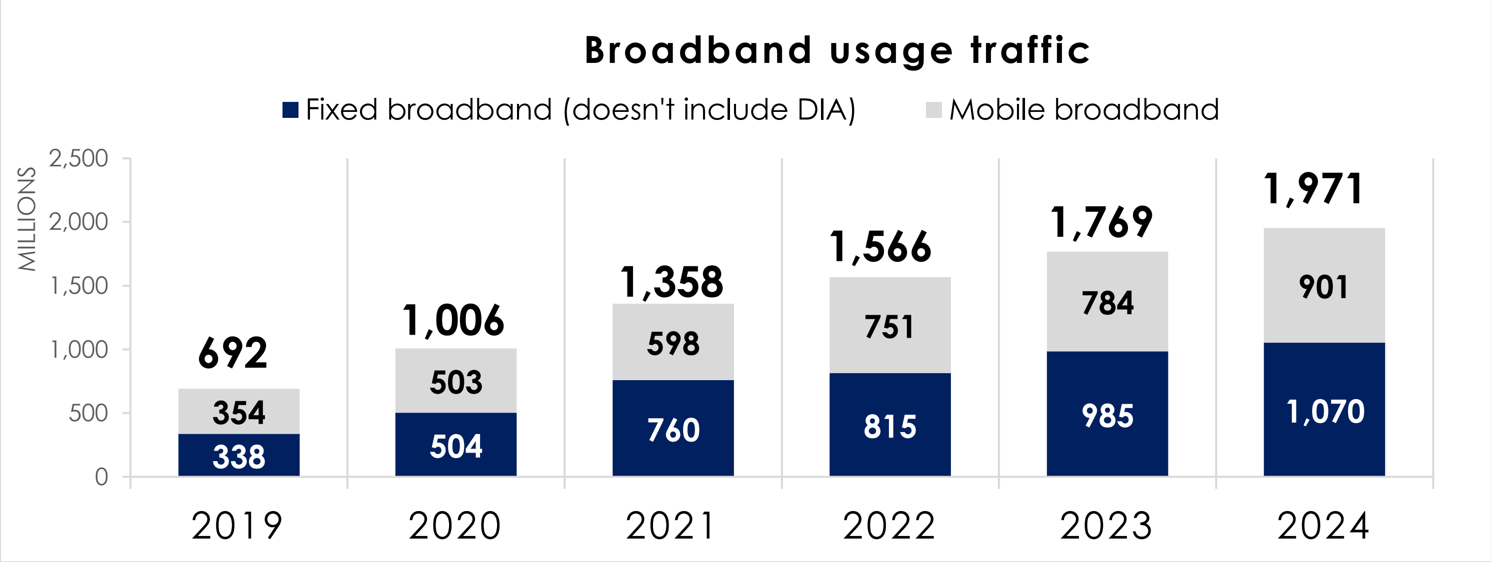
- In 2018, there was around **3,000** subscribers to speeds equaling to 100Mbps or more. In 2024 this number reached **around 155,000** subscribers.



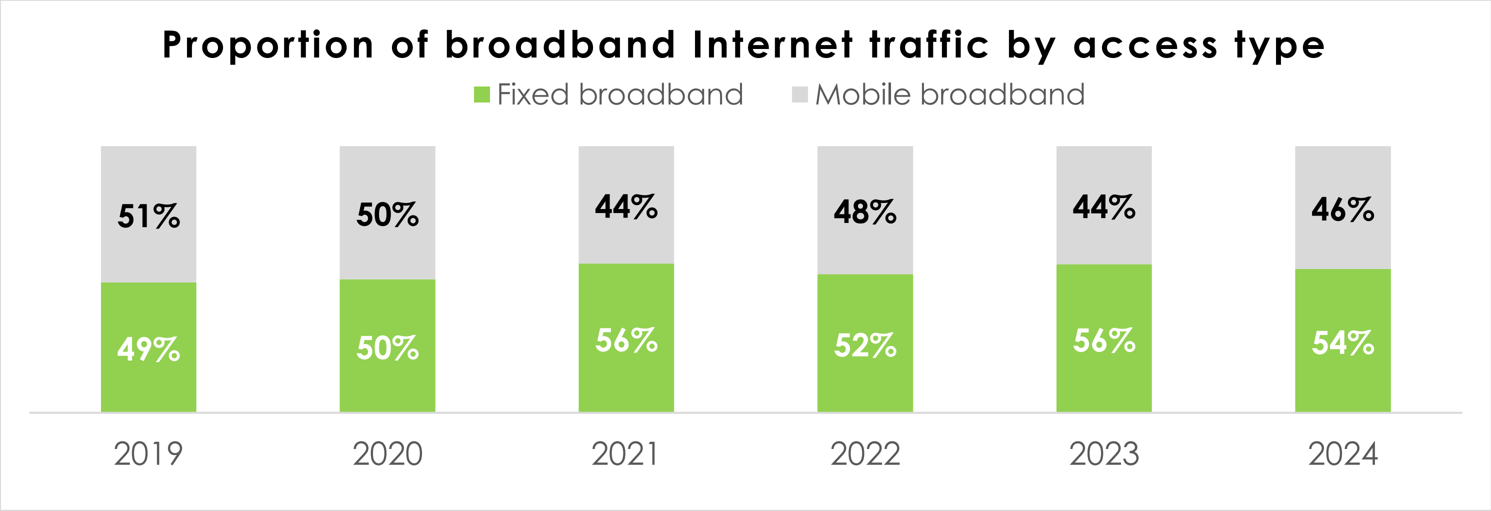
* Fibre broadband speeds equal to 100 Mbps and above

Broadband Usage

هيئة تنظيم الاتصالات
TELECOMMUNICATIONS REGULATORY AUTHORITY
Kingdom of Bahrain - مملكة البحرين



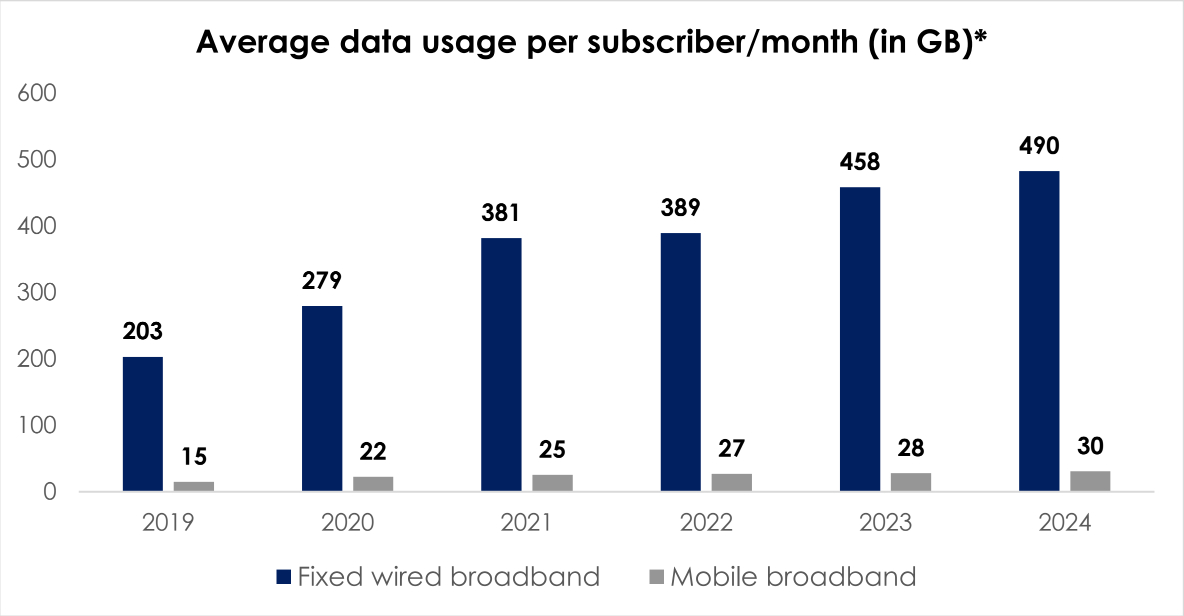
** Includes data roaming*

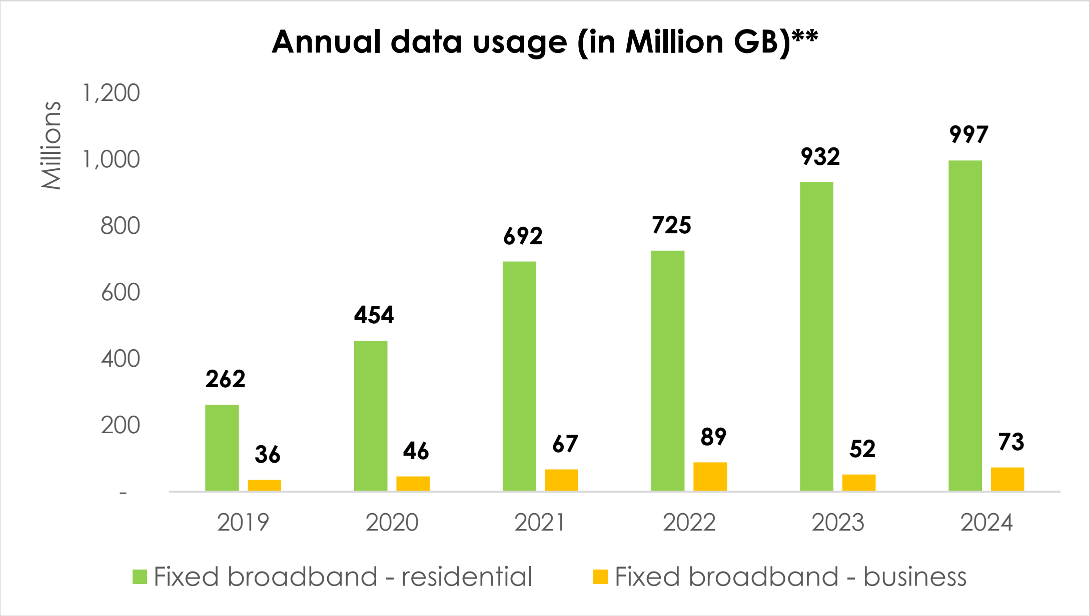


- In 2024 total broadband usage reached 1,971 million GB compared to 692 million GB in 2019.
- Between 2019 and 2024, Mobile broadband usage increased Threefold.

- The traffic (in GB) generated from mobile broadband represented 46% of the total broadband usage in 2024, compared to 51% in 2019.
- Between 2023 and 2024, fixed broadband usage increased by 7% and mobile broadband usage increased by 15%.

Average Usage per Broadband Subscription





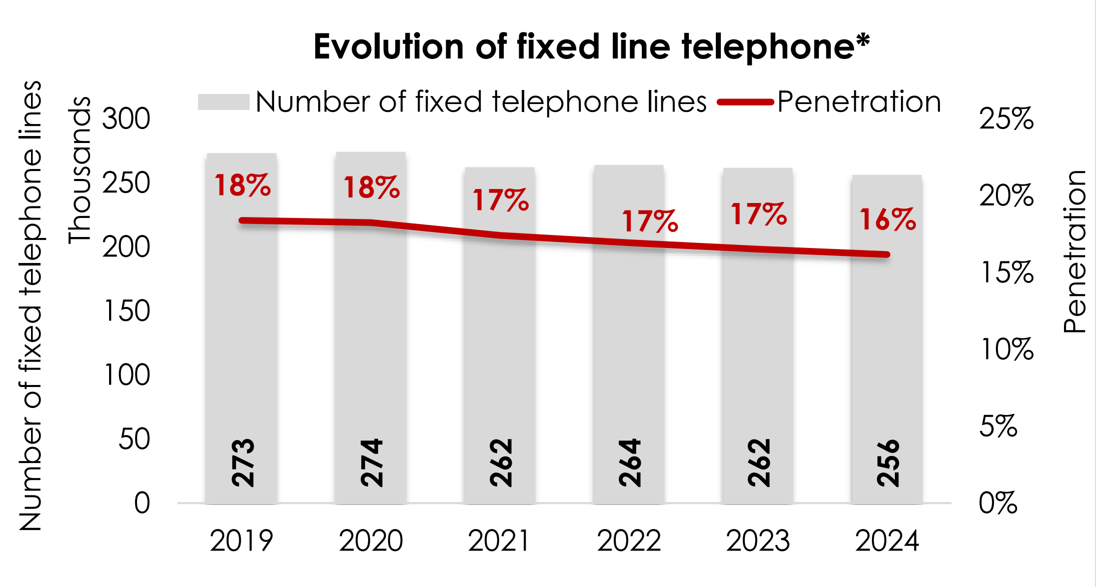
- The average usage (in GB) per subscriber varies based on the broadband access type.
- Fixed wired broadband subscribers generated the highest average monthly usage, relative to the number of subscribers. Lowest usage was generated by mobile broadband subscribers (although the overall average mobile broadband usage per subscriber is heavily influenced by low use of pay-per-use subscribers).

** Mobile broadband includes dedicated mobile broadband and broadband added to voice*

** Increase in Business broadband usage is due to an operator's high Fibre broadband usage as of 2021.

FIXED LINE TELEPHONY SERVICES

Fixed Line Telephony Services



- There were **256,197** fixed-line telephony services (including ISDN) in operation at the end of 2024, compared to 261,665 fixed telephone lines in services at the end of 2023.

- Regarding ISDN service, Basic-rate ISDN has dropped by **29%** between 2023 & 2024 while Primary-rate ISDN service dropped by **10%.**

Number of	2019	2020	2021	2022	2023	2024
***ISDN	2,350	2,136	1,980	2,185	2,196	1,452
Basic-rate	867	657	653	665	583	412
Primary-rate	1,483	1,479	1,327	1,520	1,613	1,864

* Including ISDN subscribers (Basic ISDN = 2 lines, Primary ISDN= 30 lines)
^ Revised numbers due to an operator resubmission
** ISDN subscriptions refers to the number of subscriptions to the Integrated Services Digital Network. This can be separated into basic-rate and primary-rate interface service.

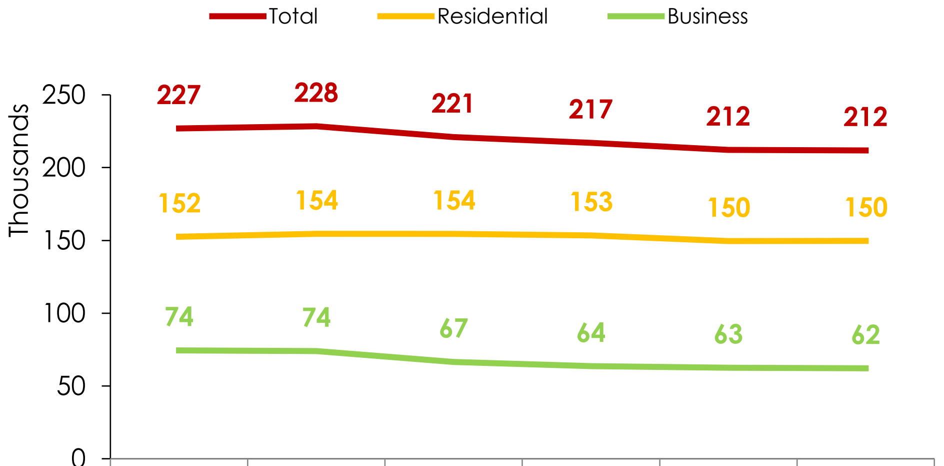
*Mid-year population estimated by CIO:

2023	1,583,934
2024	1,588,670

Fixed Line Telephony Services By Customer Type

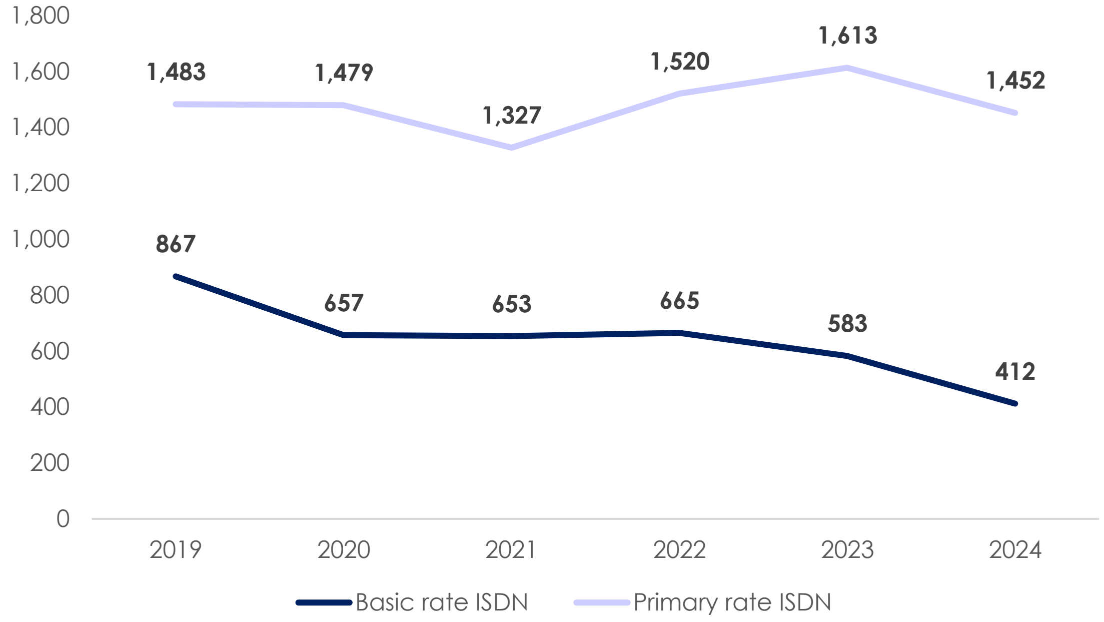
هيئة تنظيم الاتصالات
TELECOMMUNICATIONS REGULATORY AUTHORITY
Kingdom of Bahrain - مملكة البحرين

Number of fixed telephony lines by customer type (Excluding ISDN & CPS)



	2019	2020	2021	2022	2023	2024
Total	226,898	228,422	221,045	216,983	212,109	211,813
Residential	152,474	154,463	154,474	153,466	149,543	149,680
Business	74,424	73,959	66,571	63,517	62,566	62,133

Number of ISDN subscriptions



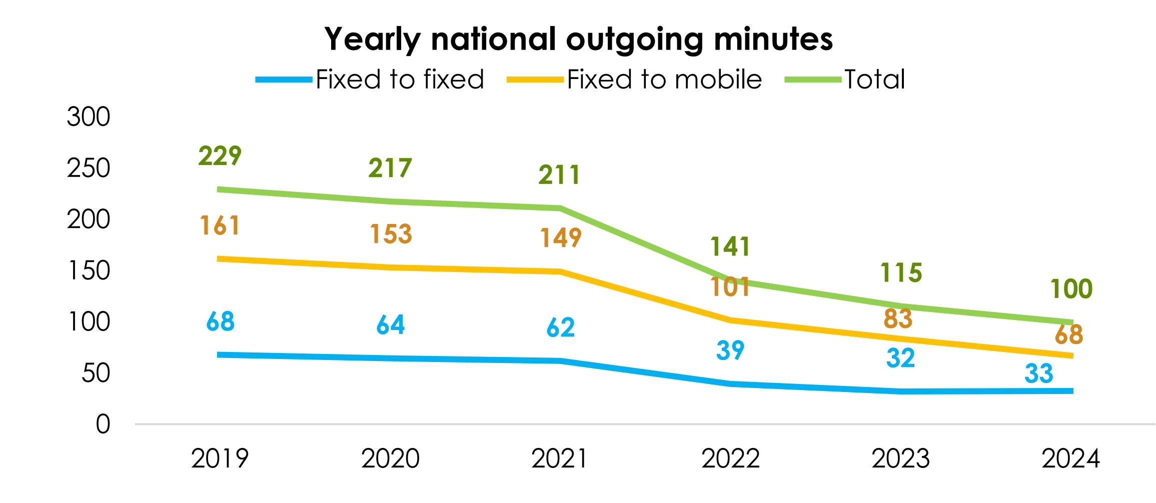
- Total number of fixed telephony lines has decreased by **less than 1%.** The total number of residential lines slightly increased by **0.1%**, and the total number of business lines dropped by **0.7%** compared to 2023.
- By end of 2024, Basic business lines dropped by **29%** and Primary business lines dropped by **10%.**
- Since 2019, Primary business lines dropped by **2%** while Basic business lines dropped by **52%** relative to 2023.

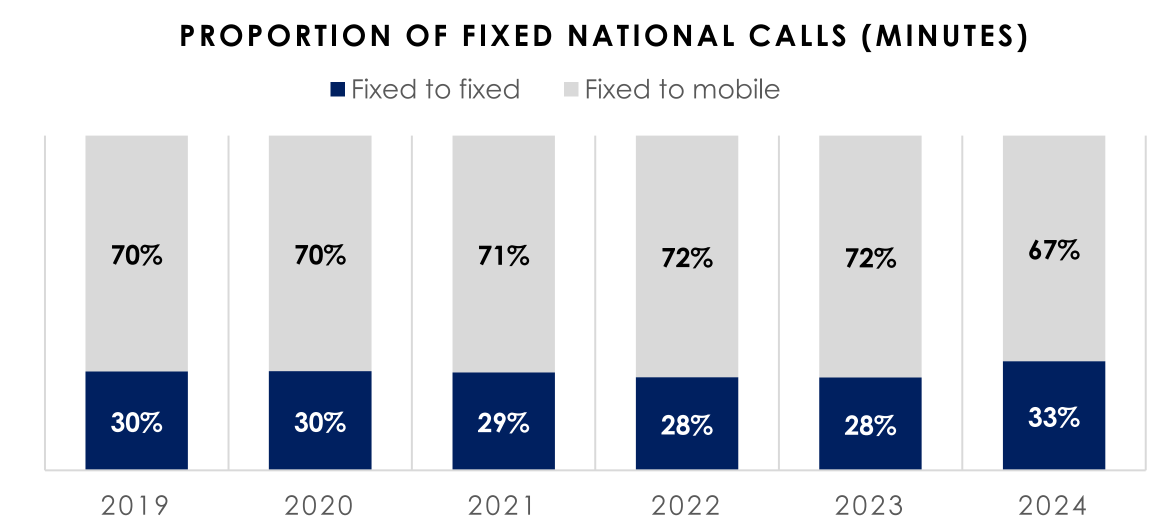
Fixed Line Telephony Outgoing Minutes

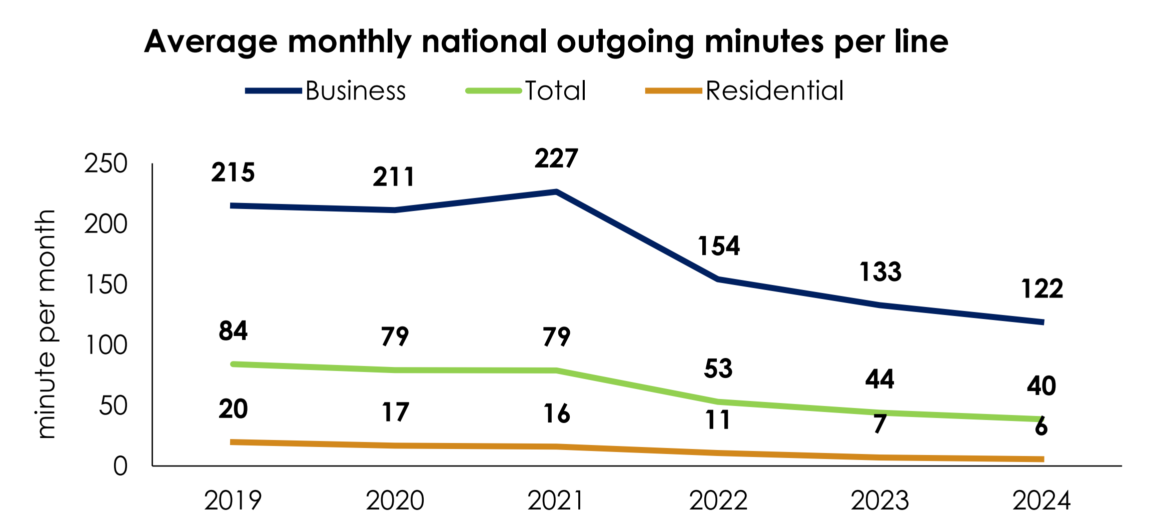
هيئة تنظيم الاتصالات
TELECOMMUNICATIONS REGULATORY AUTHORITY
Kingdom of Bahrain - مملكة البحرين

- The outgoing fixed call minutes fell by around **18%** from 115 to **100** million minutes between 2023 and 2024 as consumers increasingly use mobile and internet-based voice and messaging services instead of fixed line telephony calls.

- Average monthly national outgoing minutes continued to decline as the average minutes for residential fixed lines declined by 19.7% while average minutes for business fixed lines dropped by around 13.5%.



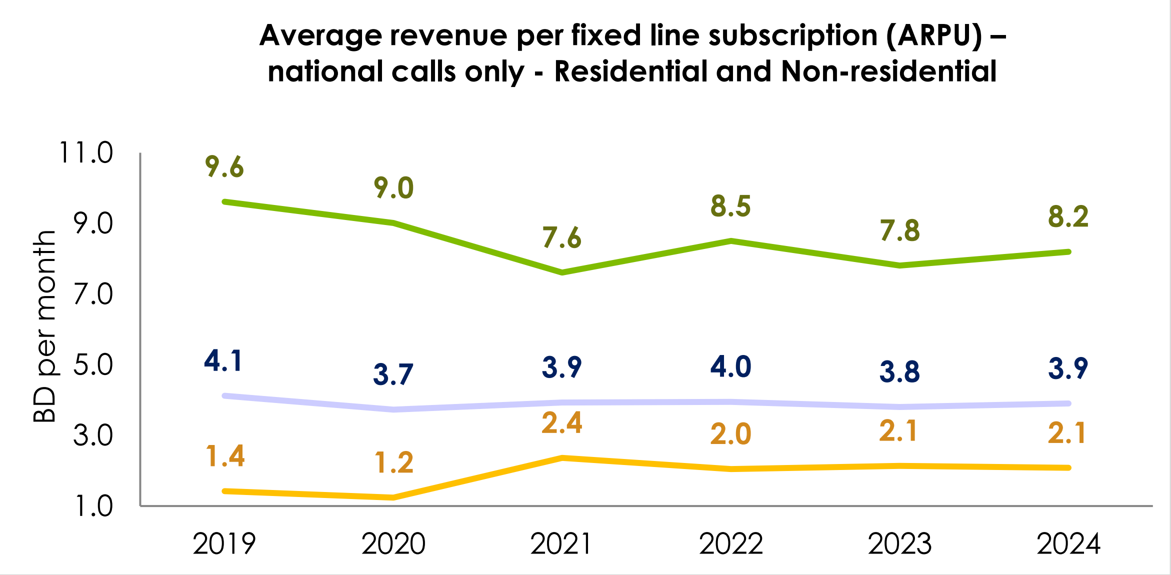




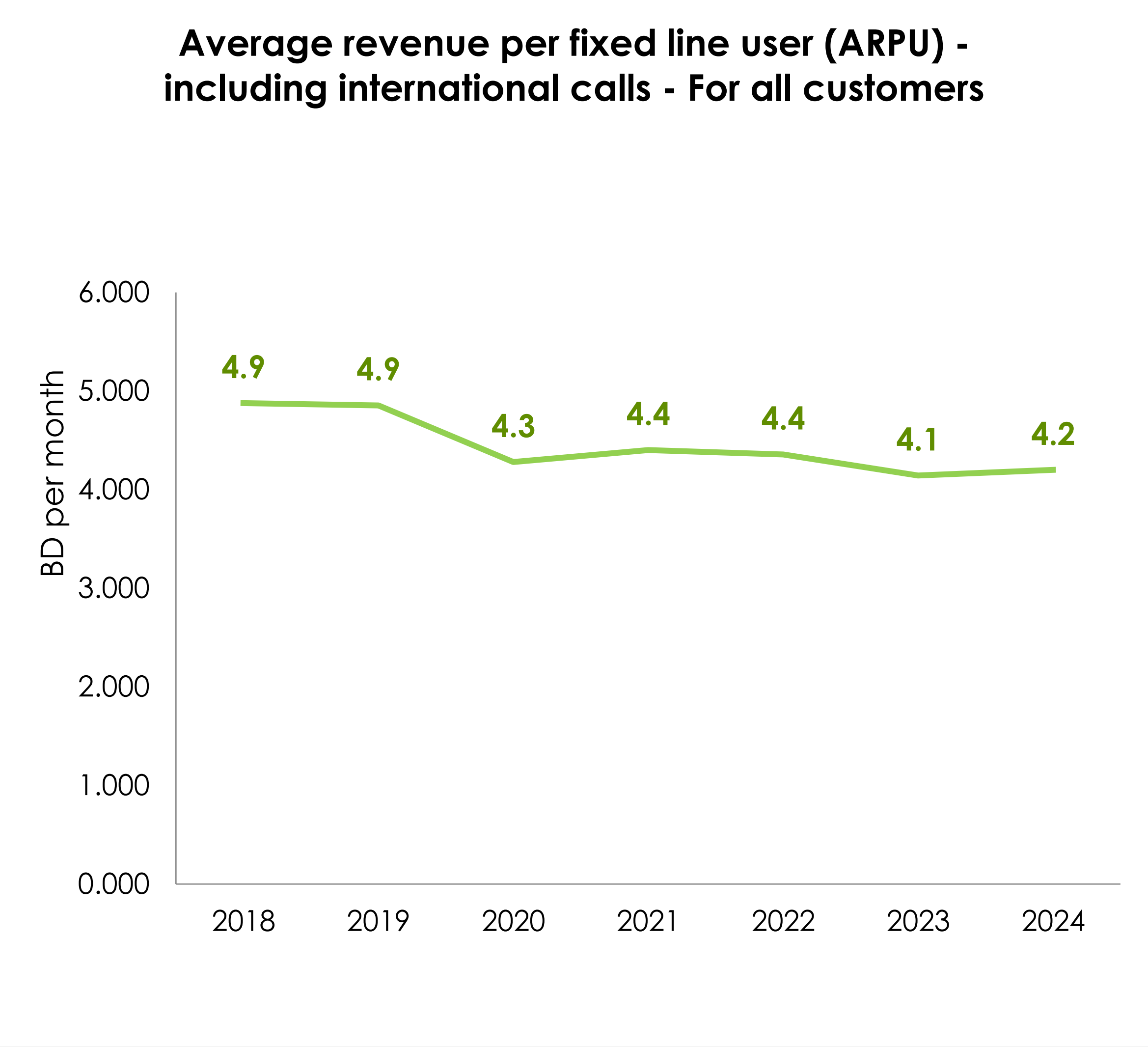
Fixed Line Telephony Service Revenue

- Fixed line revenue slightly dropped between 2023 & 2024 by less than **1%** from **BHD 9.8 million** to **BHD9.7 million.**

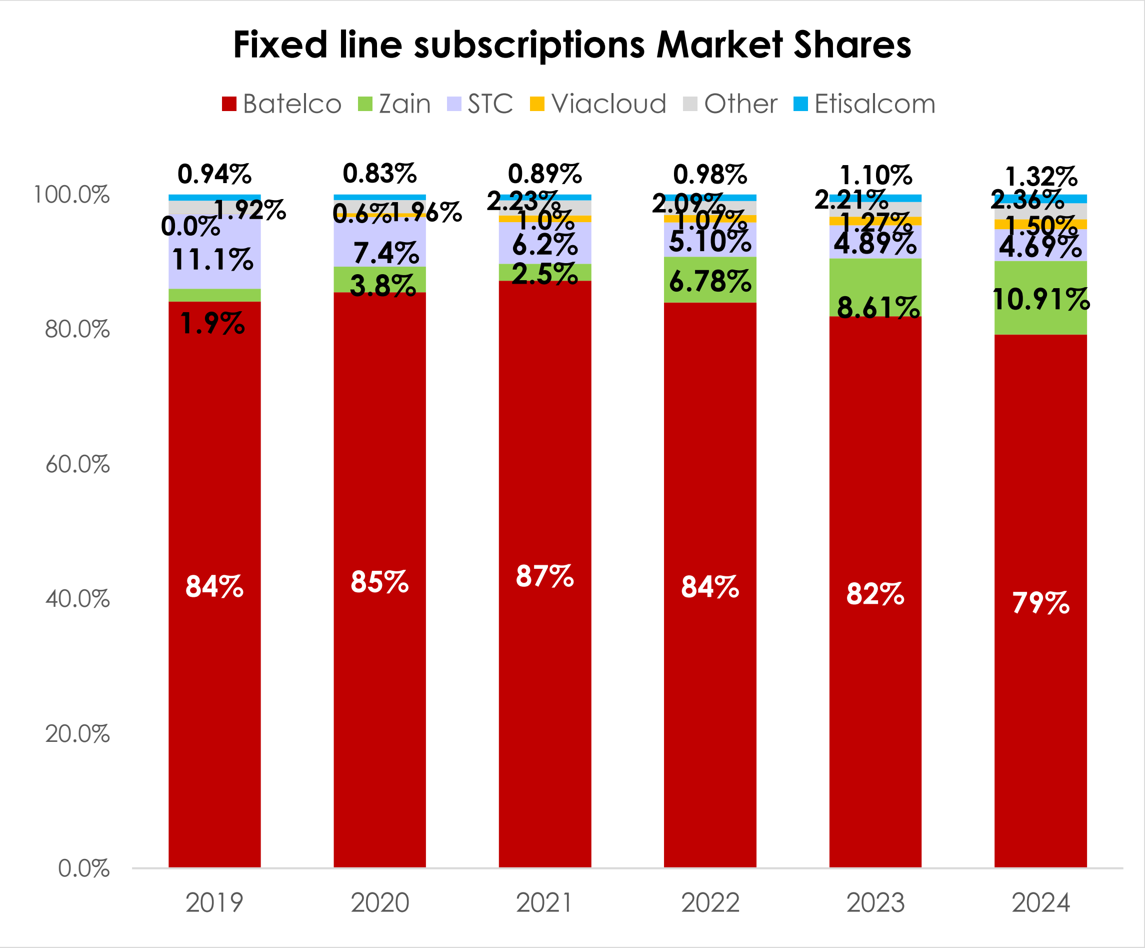
- The average monthly revenue per user for national calls increased to reach **3.9.** Similarly, average revenue including international calls increased to **4.2**.

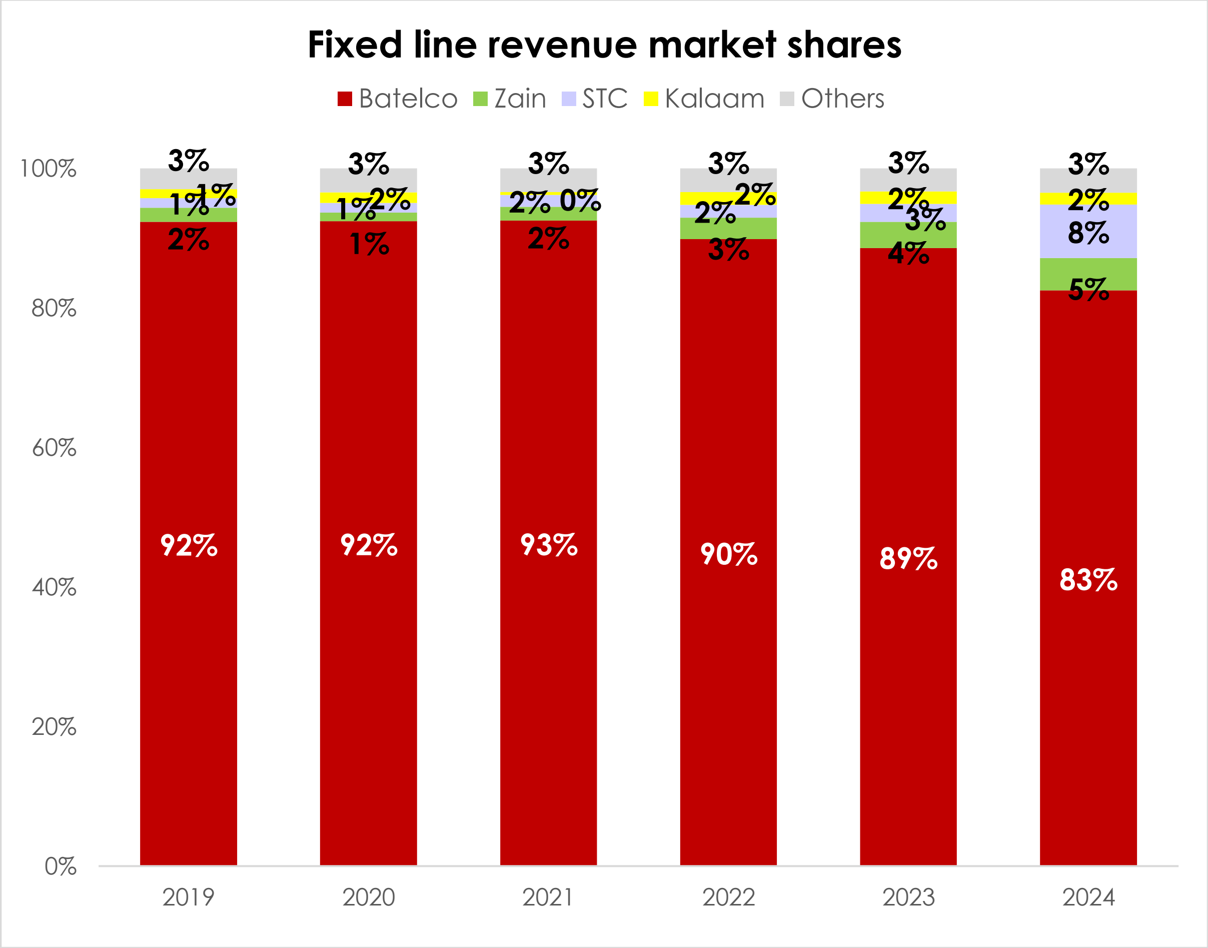


* Increase in residential ARPU is due to enhanced reporting for 2021, which better captures the ARPU for each category.



Fixed line telephony subscriptions and revenue market shares





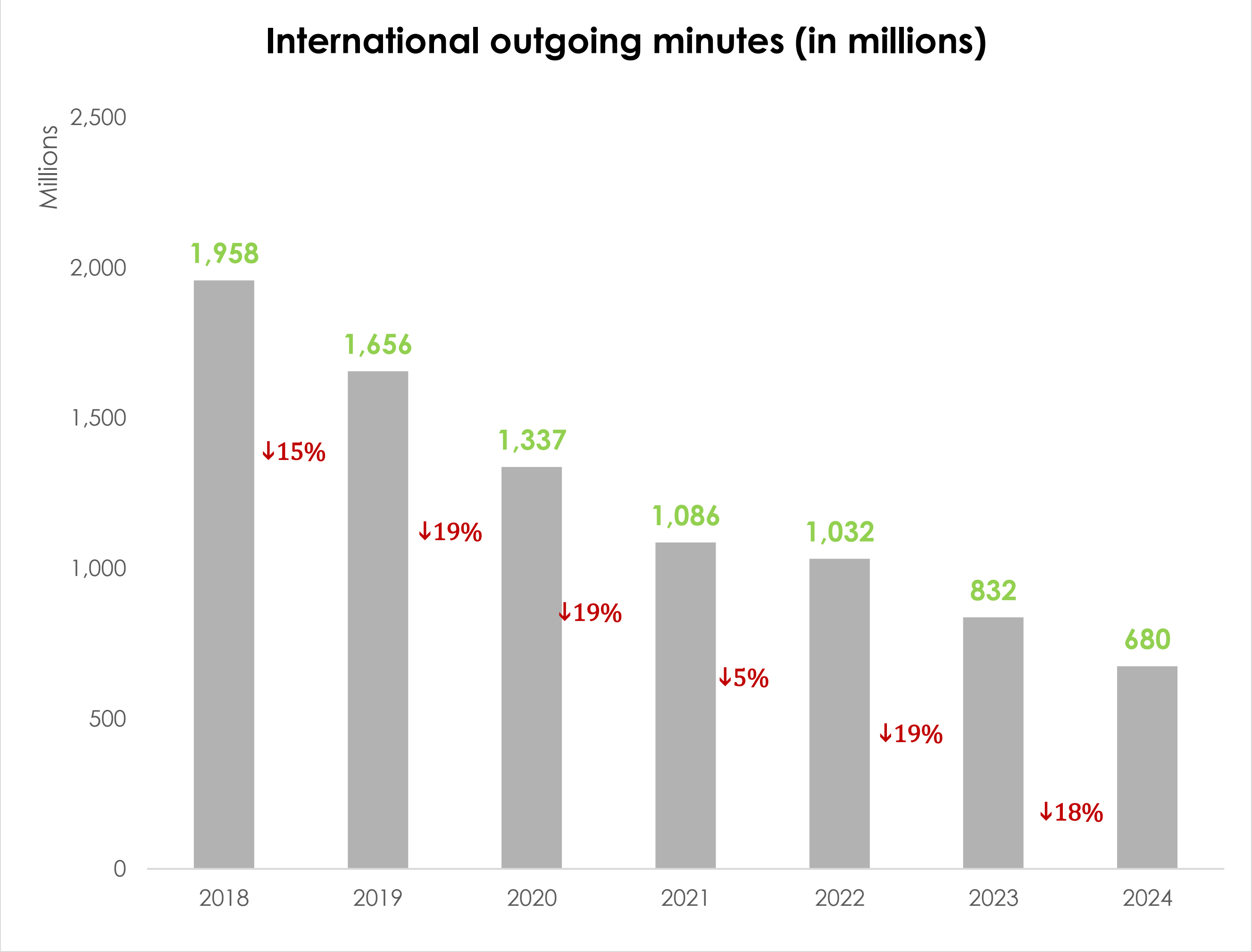
INTERNATIONAL OUTGOING MINUTES

International Outgoing Minutes

- During 2024 international outgoing minutes continued to drop, reaching **680** million minutes compared to 832 million minutes in 2023.

- The drop in traditional voice services could be attributed to change in consumer behavior.

2024	**680,470,548**	
	98%	of calls originated from mobile
	90%	of outgoing traffic went to South Asian countries



International Outgoing Minutes

هيئة تنظيم الاتصالات
TELECOMMUNICATIONS REGULATORY AUTHORITY
Kingdom of Bahrain - مملكة البحرين

- International outgoing minutes dropped by **44%** between 2023-2024 and International calls revenue also decreased by **23%** over the same period.
- This decline indicates a change in the overall subscribers’ behavior and usage.

International outgoing minutes

Minutes (in millions)	2019	2020	2021	2022	2023	2024	% Change 2023-2024
GCC	53.1	40.2	37.2	36.2	32.3	30.9	**-5%**
Zone 2	1,529	1,236	993.9	943.9	754.7	613	**-19%**
Zone 3	28.7	26.3	26.1	23.1	18.5	12.1*	**-35%**
Zone 4	43.8	34	28.7	28.6	26.6	24	**-10%**
Total	**1,655**	**1,337**	**1,086**	**1,032**	**832**	**680**	**-18%**

International calls revenue

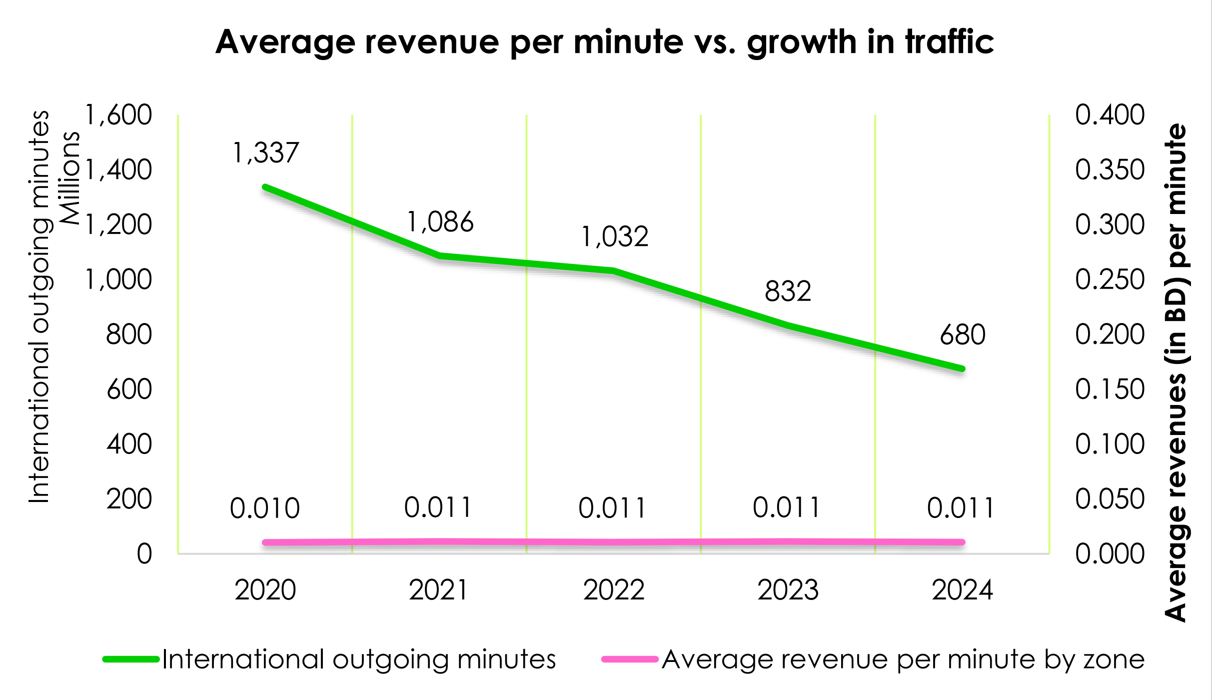
Revenues (BD in millions)	2019	2020	2021	2022	2023	2024	% Change 2023-2024
GCC	3.86	3.25	3.1	2.9	2.6	2.5	**-6%**
Zone 2	8.6	6.85	5.8	5.1	4.2	2.9	**-29%**
Zone 3	1.67	1.45	1.35	1.1	0.8	0.6	**-28%**
Zone 4	2.9	2.36	2	1.8	1.5	1.05	**-32%**
Total	**17.06**	**13.9**	**12.26**	**10.96**	**9.3**	**7.2**	**-23%**

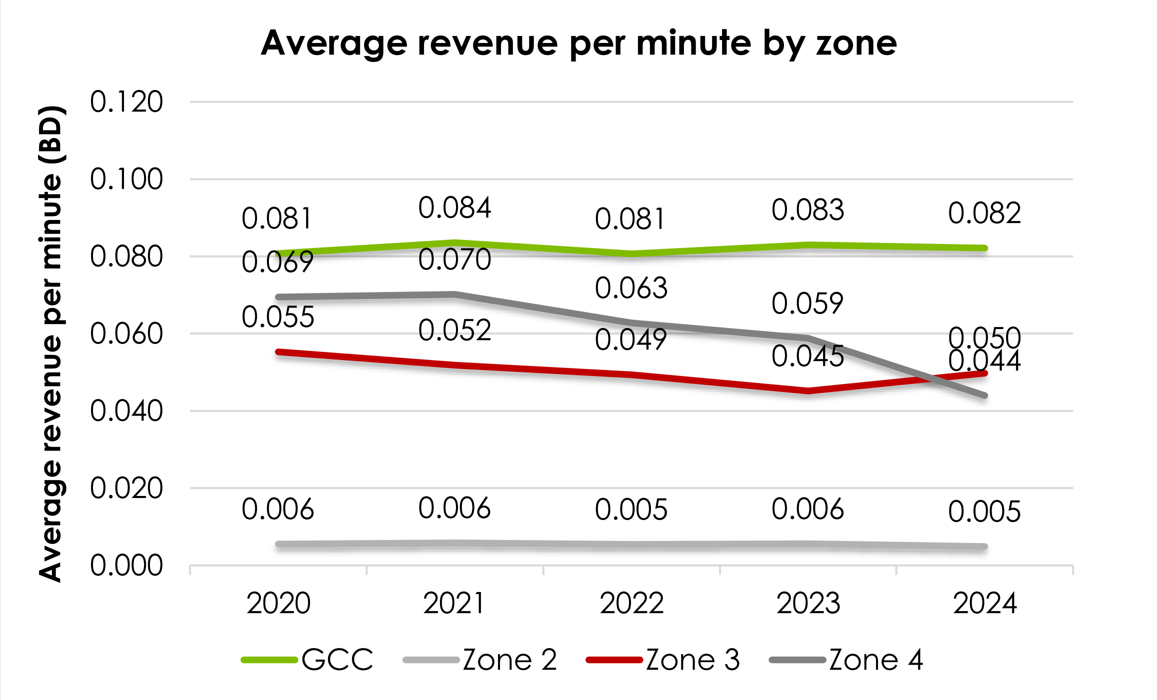
GCC countries (Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates).
Zone 2: Calls to South Asian countries (Bangladesh, India, Pakistan, the Philippines and Sri Lanka).
Zone 3: Calls to other major destinations (Australia, Canada, France, Germany, Greece, Italy, Iran, New Zealand, Thailand, UK, USA and Yemen).
Zone 4: Calls to all other international destinations.

* An operator reported significant drop in Zone 3 traffic due to a “system related” issue. This number is currently under review and is subject to change.

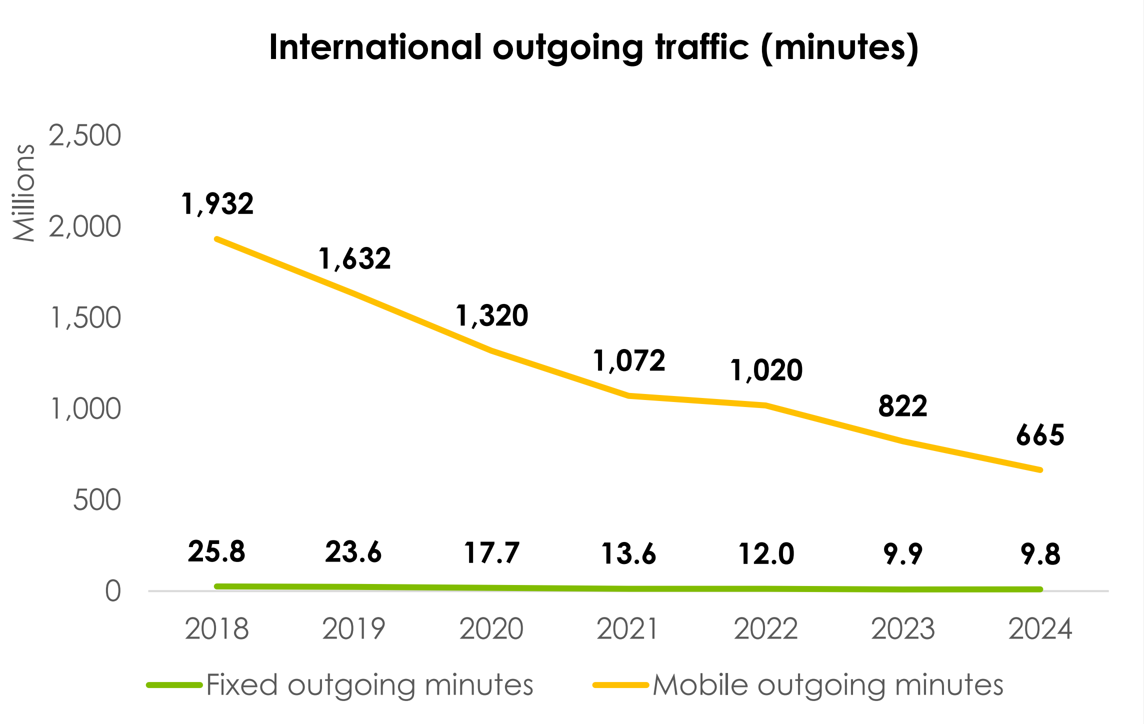
Average Revenue per Minute for International Calls

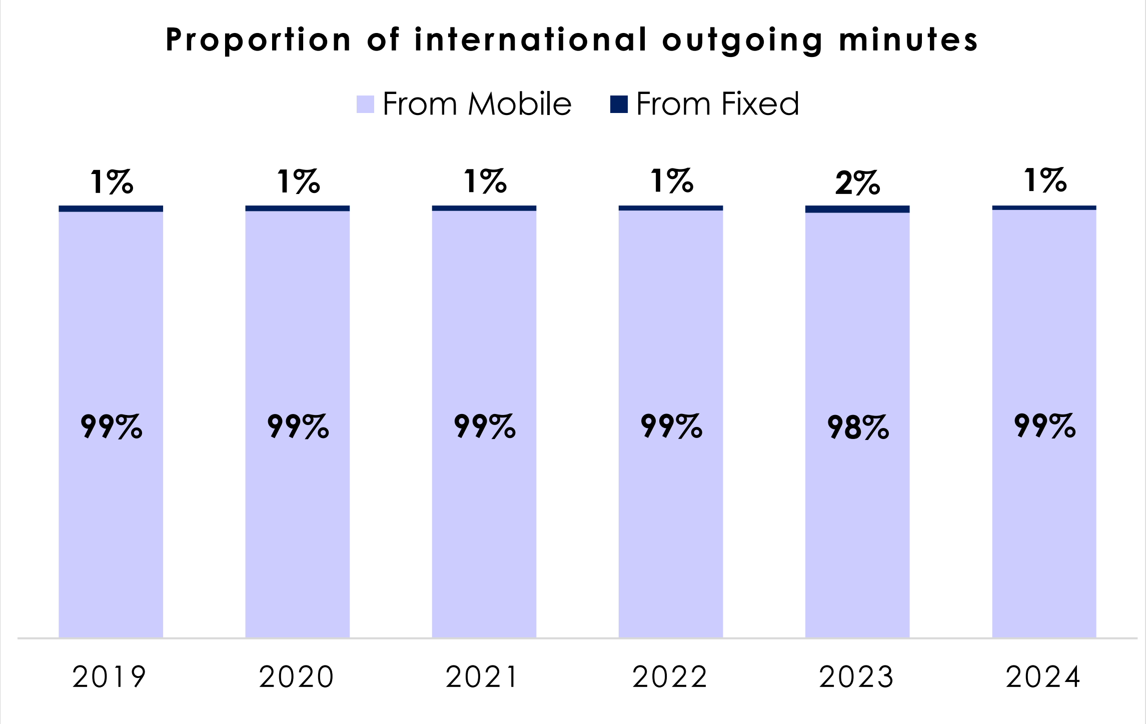
- The average revenue per minute for international calls has increased by **3%** from 2019 to 2024.
- Despite the substantial decrease in traffic, the overall average revenue per minute slightly increased to 0.015.
- Average revenue per minute dropped altogether in 2024 compared to 2023. The highest drop was mainly from Zone 3 countries (-35% drop).
- By end of 2024, the total international voice traffic in minutes was **680,470,548** with revenue of **BD 7,202,380**.





International Outgoing Minutes*



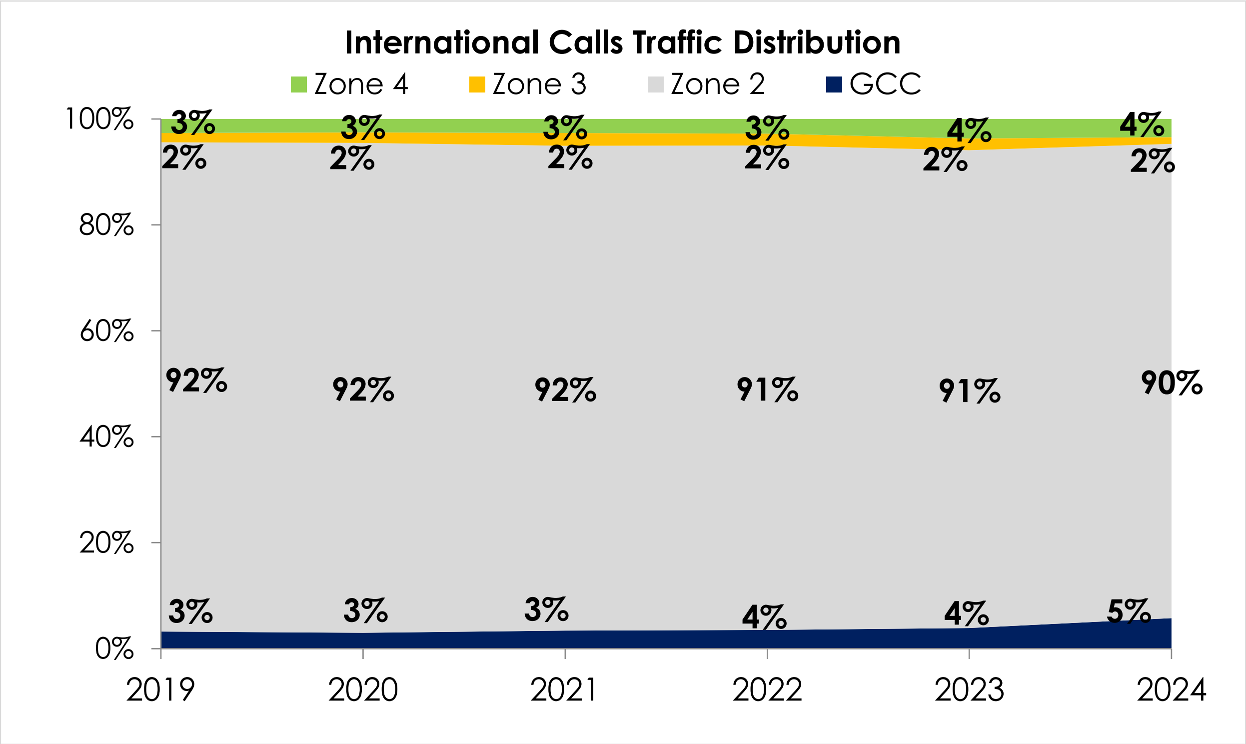


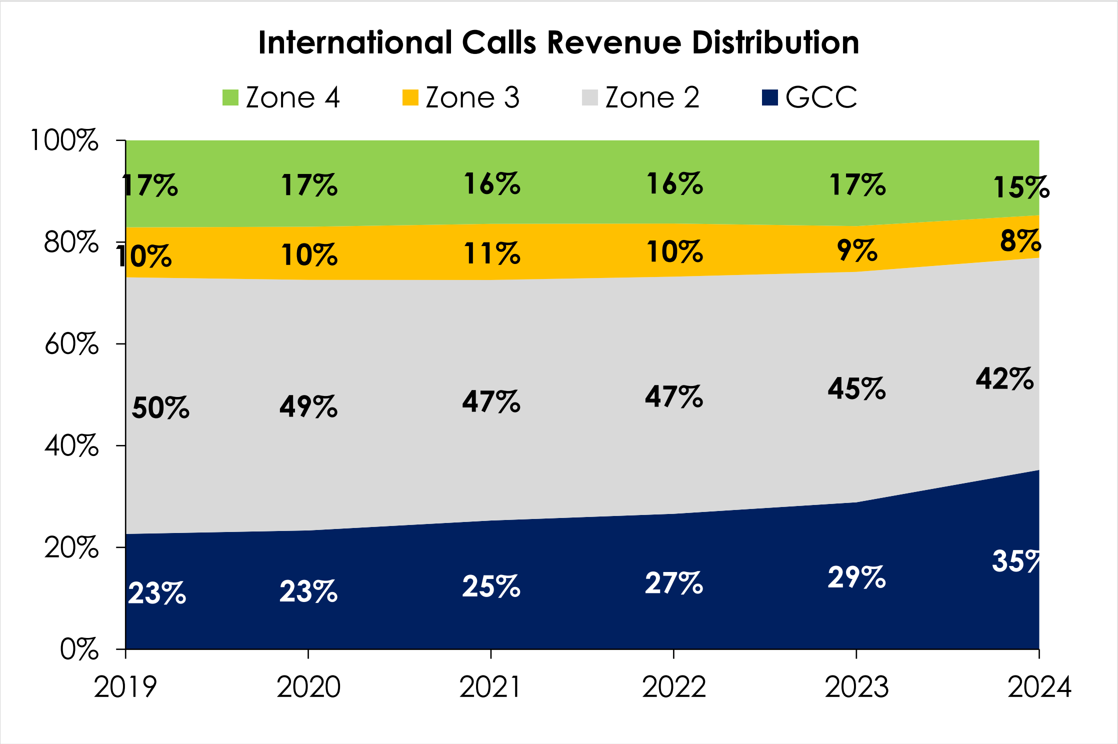
- In 2024, International outgoing minutes originated from mobile dropped by **19%** compared to 2023, while minutes originated from fixed dropped by **1%** over the same period.
- International outgoing minutes originated on mobile represented **99%** of the total international outgoing minutes in 2024.

**Minutes including prepaid calling card traffic.*

International Traffic vs. Revenues by Destination Called

هيئة تنظيم الاتصالات
TELECOMMUNICATIONS REGULATORY AUTHORITY
Kingdom of Bahrain - مملكة البحرين

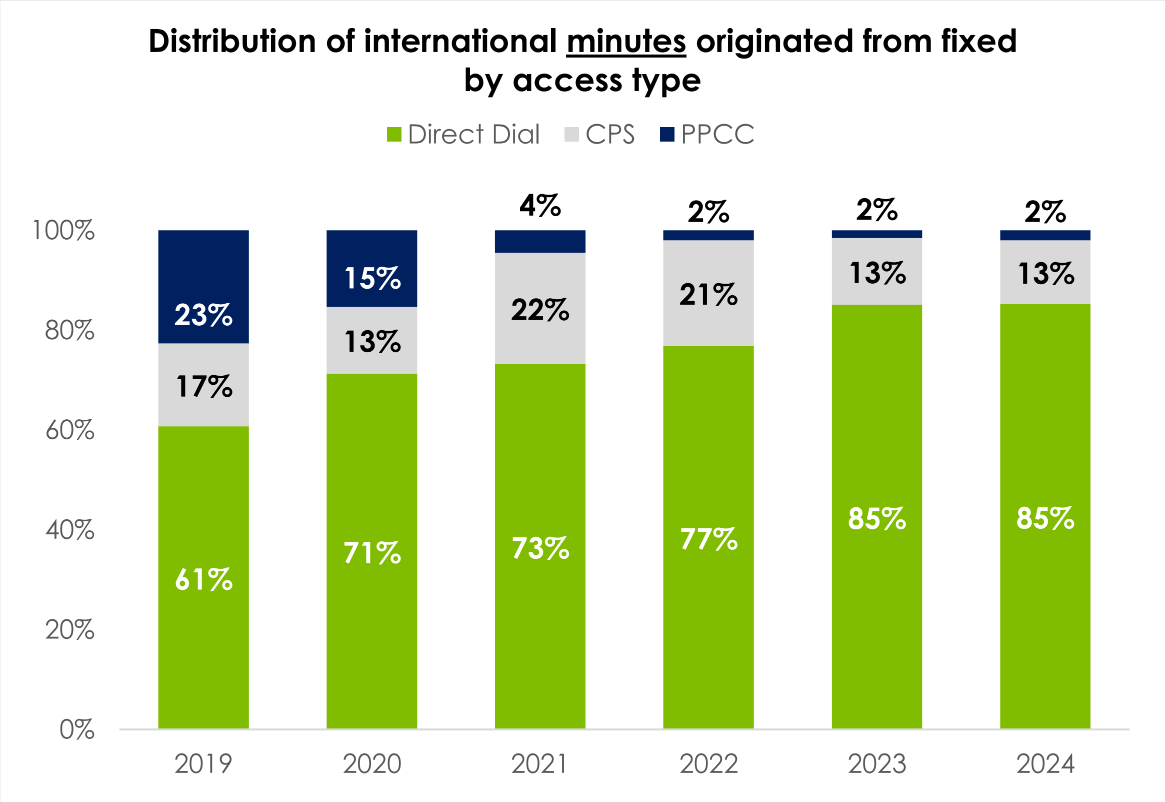


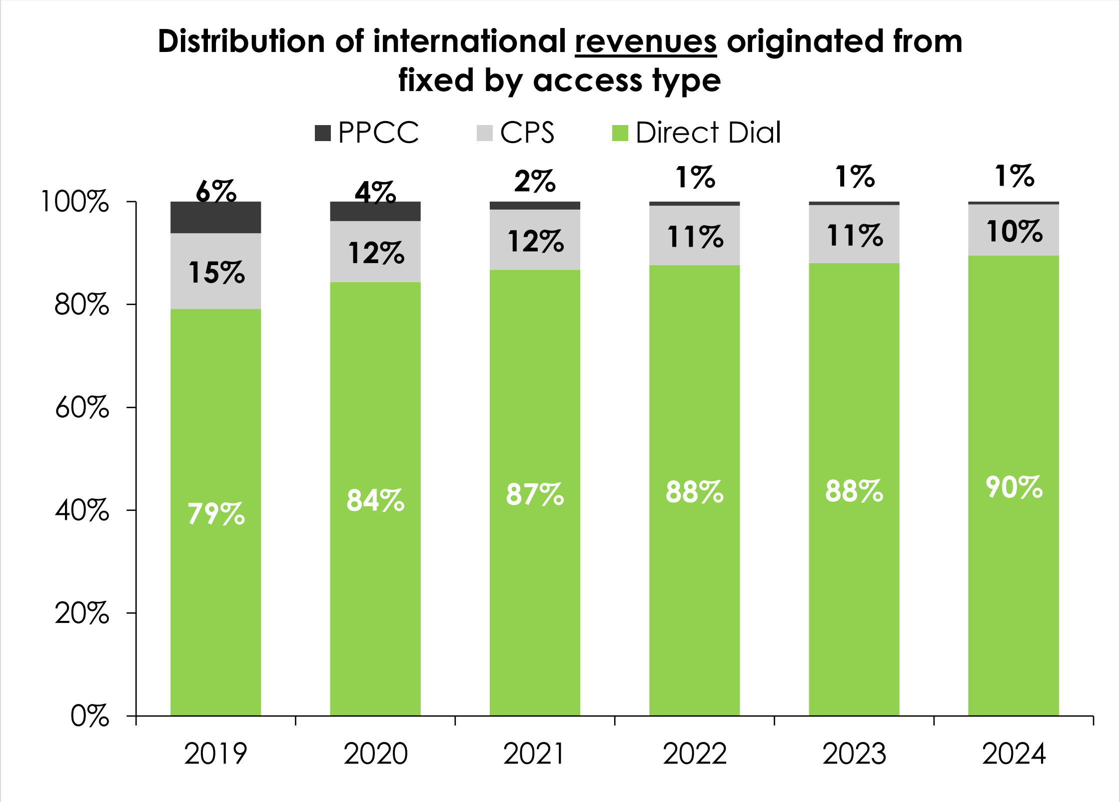


- **91% of total international calls minutes were made to Zone 2 (South Asian countries) in 2024.**
- **42% of international revenues were generated from calls to Zone 2 (South Asian countries) in 2024.**

- The average revenue per minute earned from calls to South Asian countries (Zone 2) continues to be relatively low.

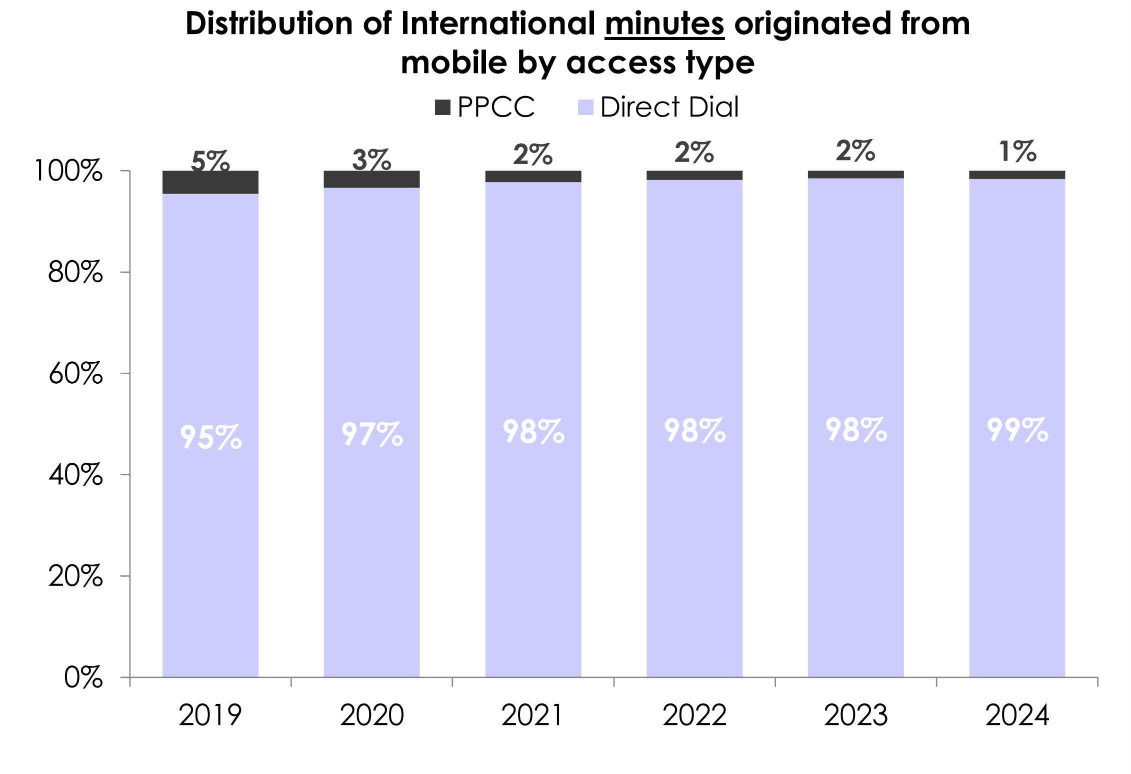
Distribution of International Outgoing Minutes/Revenues by Access Type - Fixed Telephony

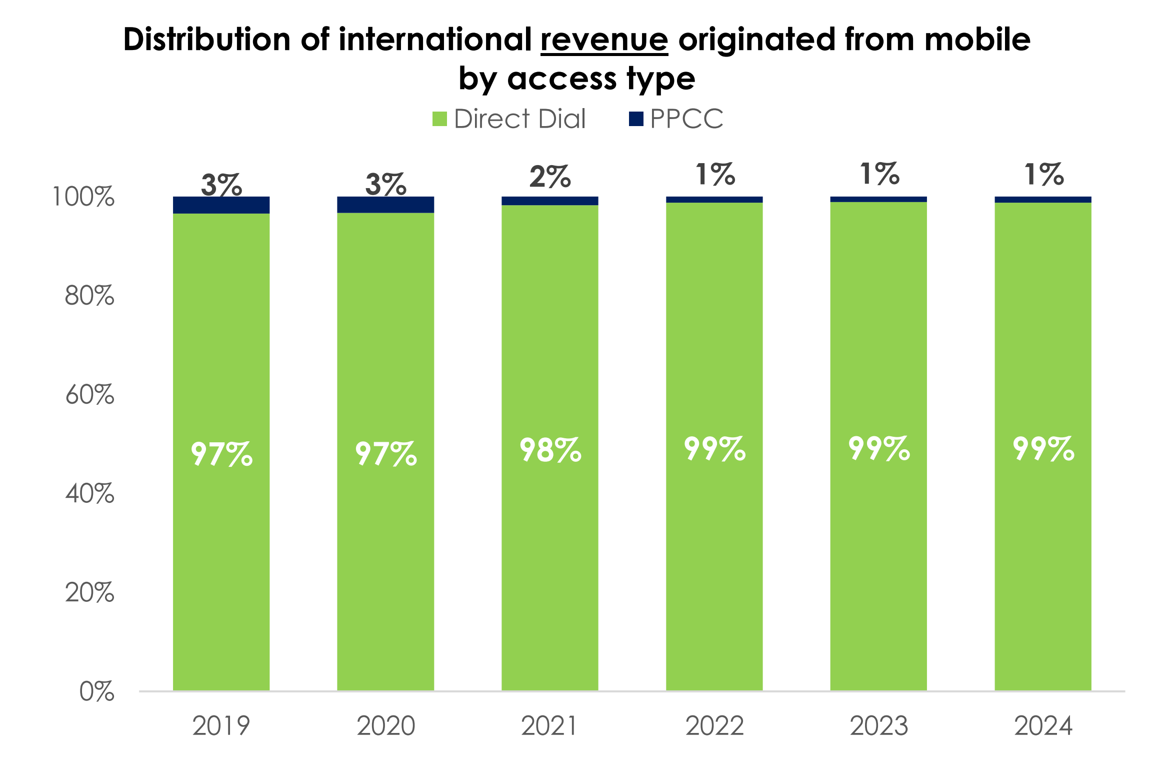




- PPCC represents **2%** of total fixed originated minutes as of 2024. Its revenue represents **1%** of total fixed telephony traffic revenue.
- Direct dial's fixed originated minutes represent **85%** of total minutes and represents **90%** of total revenue.

Distribution of International Outgoing Minutes/Revenues by Access Type - Mobile



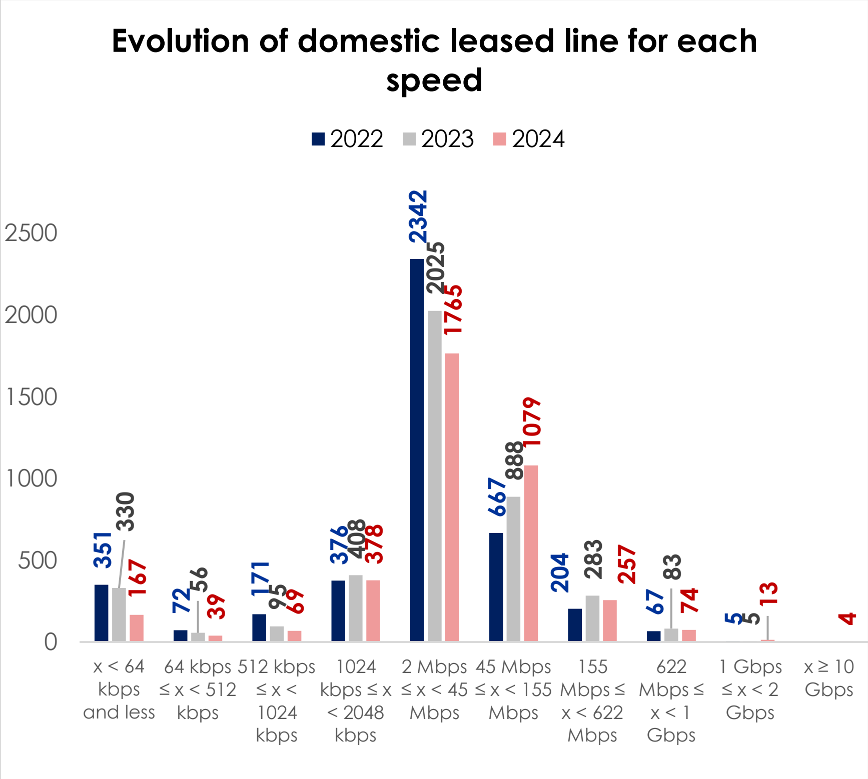


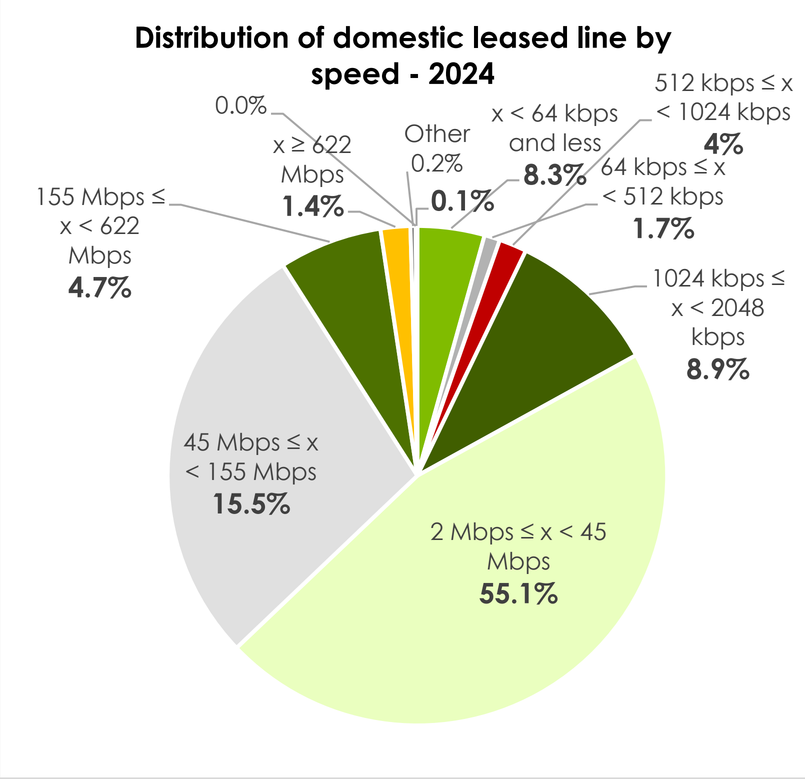
- In 2023, international direct dial traffic originated from mobile represented 99% of the total traffic. The pricing of mobile-originated international direct dial services has become even more competitive in recent years.

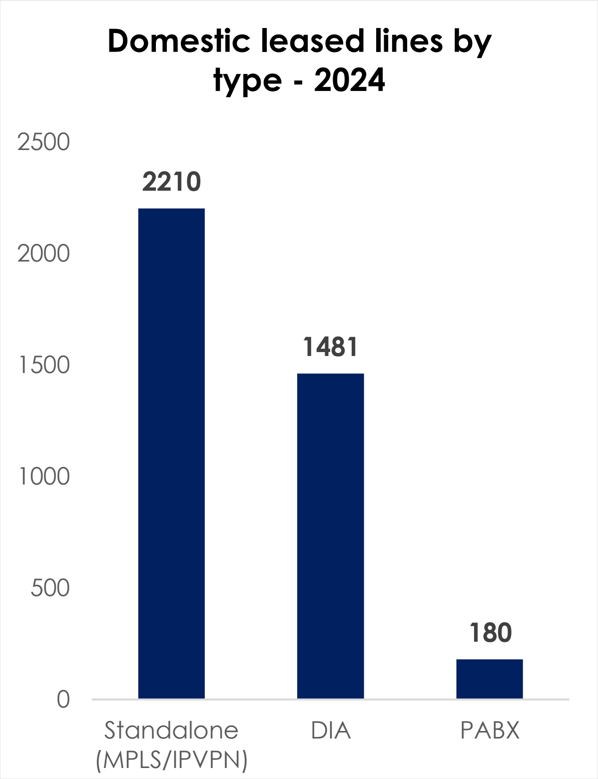
- Direct dial represented 99% of total revenues originated from mobile.

LEASED LINES

Domestic Leased Lines



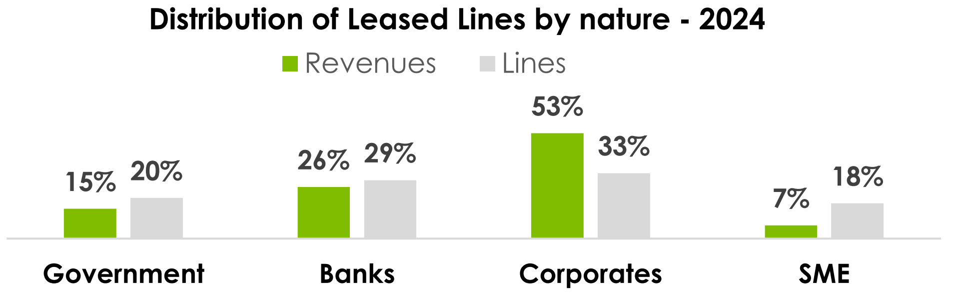


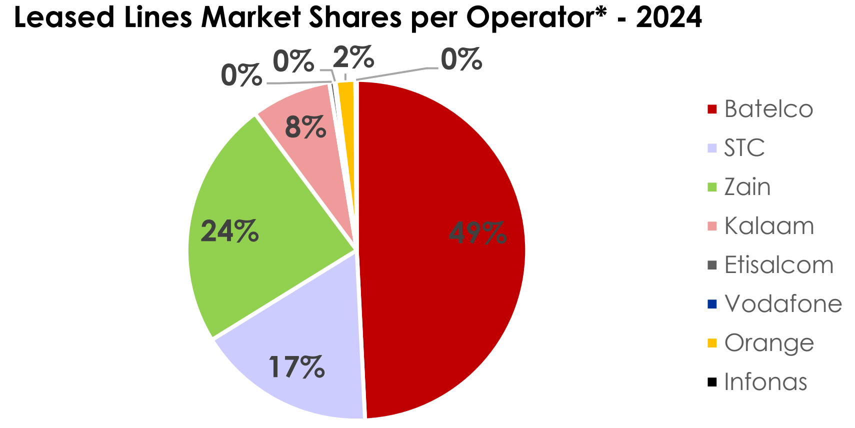


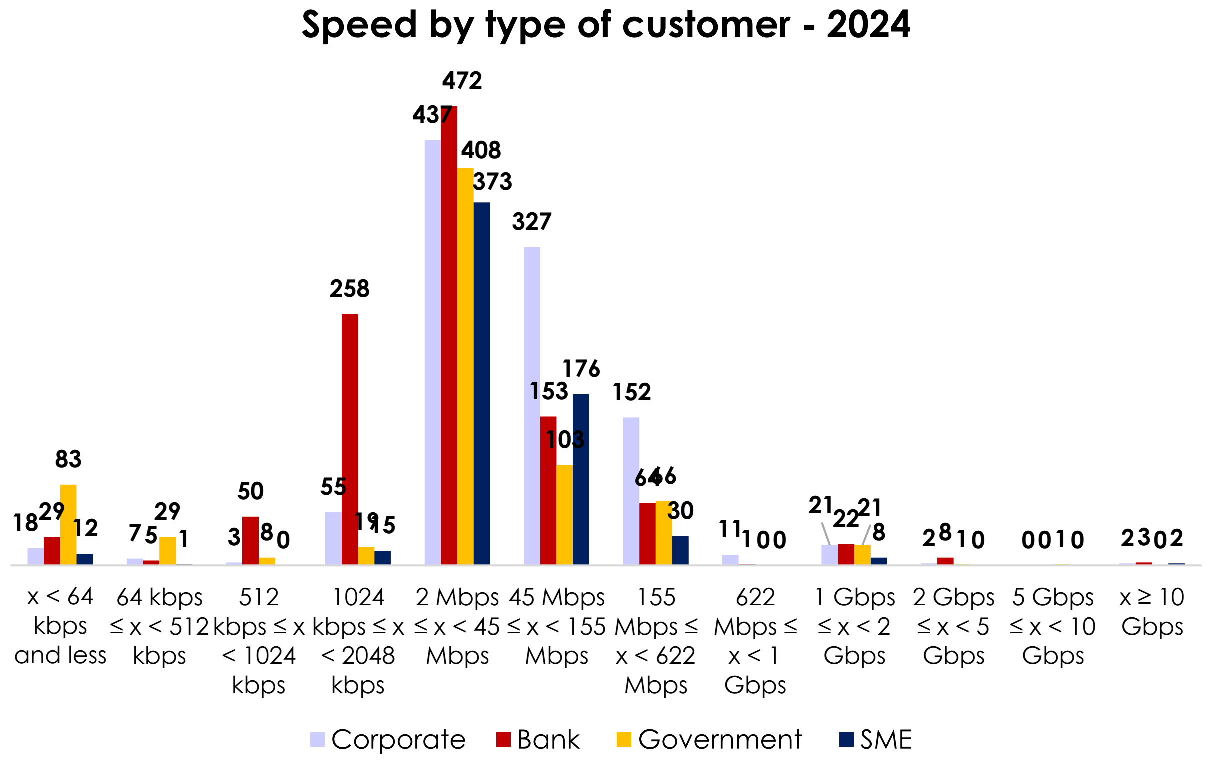
- The total number of domestic leased dropped from 4,173 lines in 2023 to 3,871 in 2024.
- The continuous drop in slower speed services is a result of migration to higher speed packages.

Domestic Leased Lines

هيئة تنظيم الاتصالات
TELECOMMUNICATIONS REGULATORY AUTHORITY
Kingdom of Bahrain - مملكة البحرين







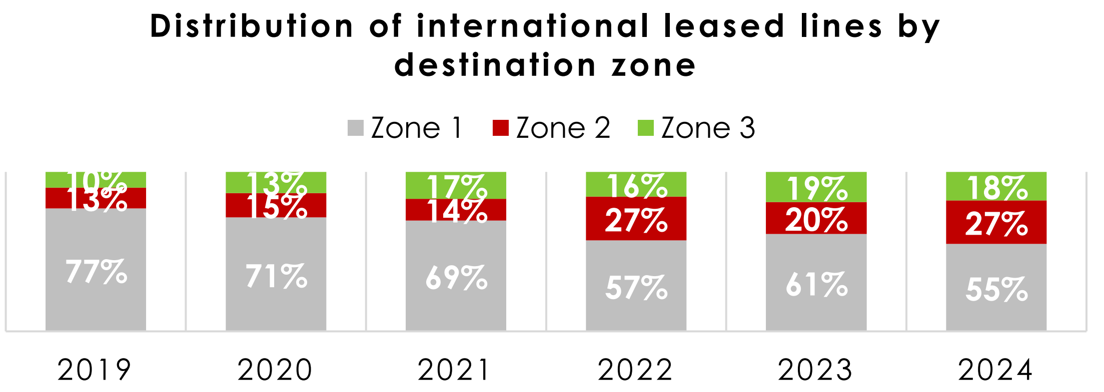
- As shown above, corporates represent more than half of the leased lines sector **(53%)** and are also the highest revenue generating segment **(33%).**
- In terms of speeds, **2 Mbps to 45 Mbps** is the most speed used by all customer segments. High speed segments **(1 Gbps to 10 Gbps)** are only consumed by banks and corporates.
- Banks have the highest number of lines in the **2 Mbps to 45 Mbps** speed category.
- In the **45 Mbps to 155 Mbps** & **155 Mbps to 622 Mbps** speed categories, corporates represent the highest share of customers.

* Based on all technologies (e.g. fibre, fixed-wireless and others..

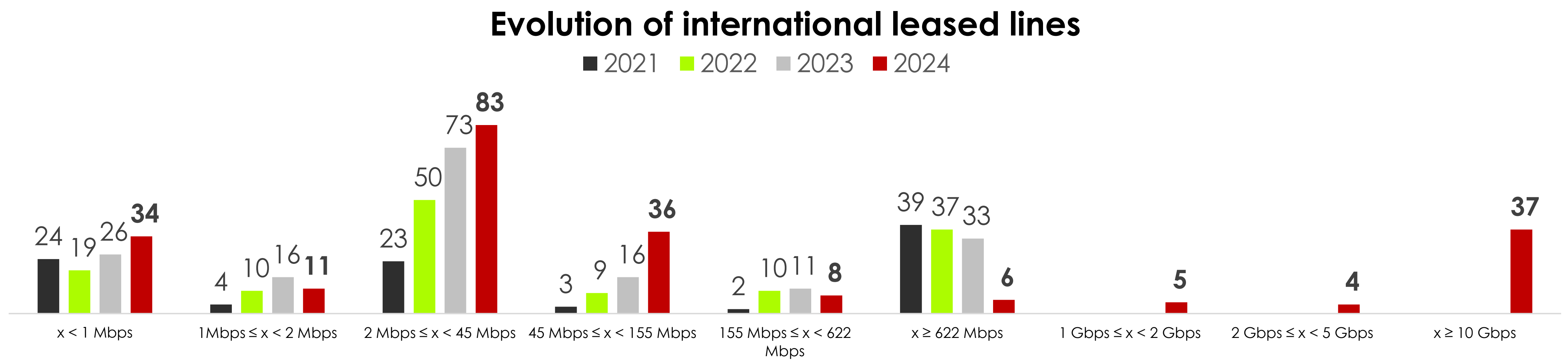
International Leased Lines

هيئة تنظيم الاتصالات
TELECOMMUNICATIONS REGULATORY AUTHORITY
Kingdom of Bahrain - مملكة البحرين

- Total Number of International leased lines increased from 180 lines at the end of 2023 to **224** lines in 2024.
- **20%** of international leased lines are for speeds less than 2Mbps, while **80%** are for speeds more than 2Mbps.
- **55%** of international leased lines are in the GCC area.



Zone 1 (GCC)
Zone 2 (rest of Middle East, Turkey, Cyprus, Greece, India, Pakistan, South Africa)
Zone 3 (Continental USA, Canada, Europe, SE Asia)



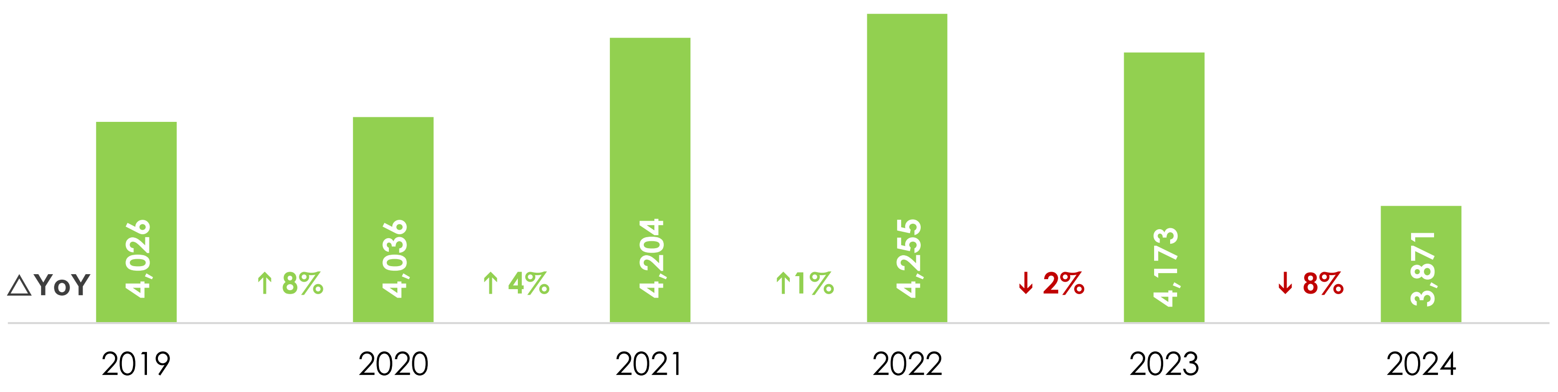
Leased Lines

- In 2024, the total number of domestic leased lines dropped by 8% compared to 2023. However, the number of international leased lines increased by 28% relative to the previous year.
- Leased lines revenue increased by 7% to reach BHD 69 Million in 2024.

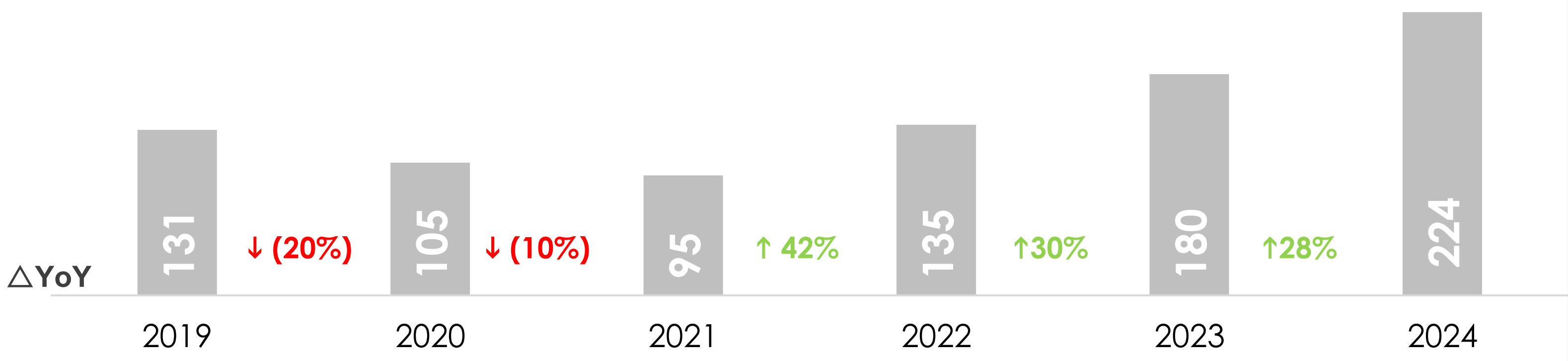
End of 2024

3,871	Domestic leased lines
224	International leased lines
BD 71,177,243	Leased lines revenues

Evolution of domestic leased lines

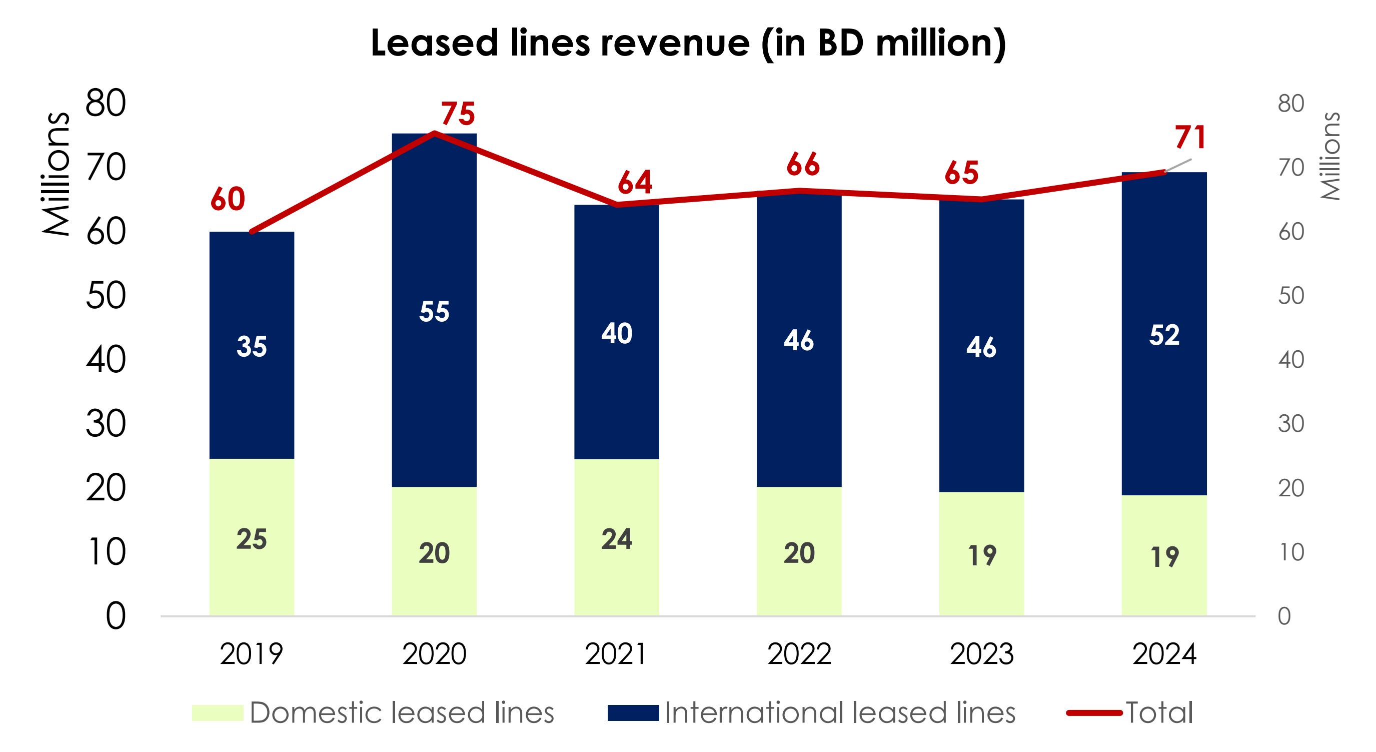


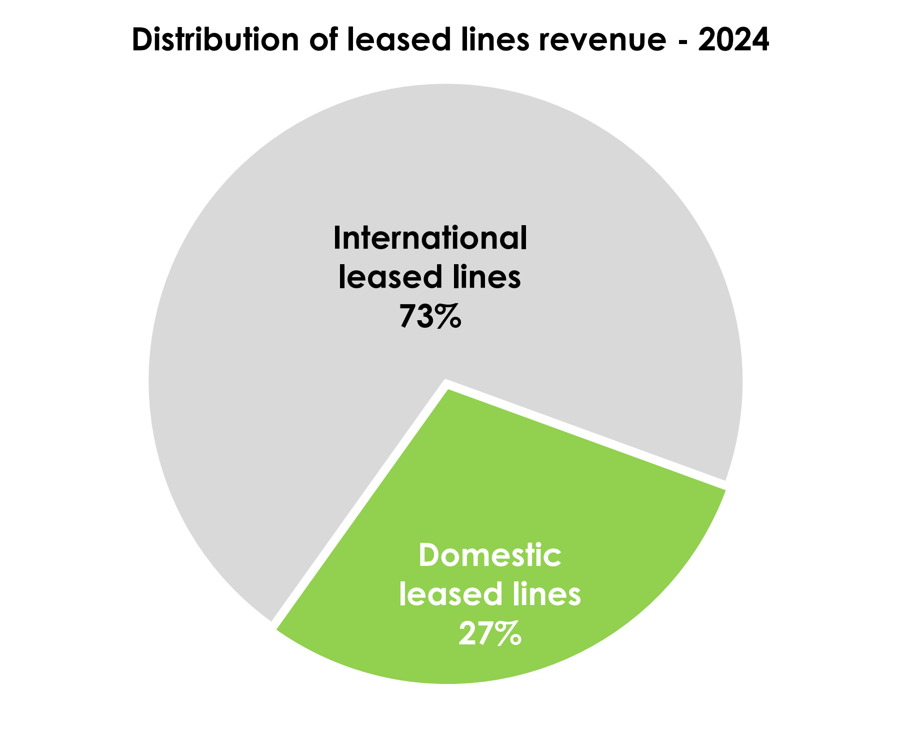
Evolution of international leased line



Leased Line Revenues

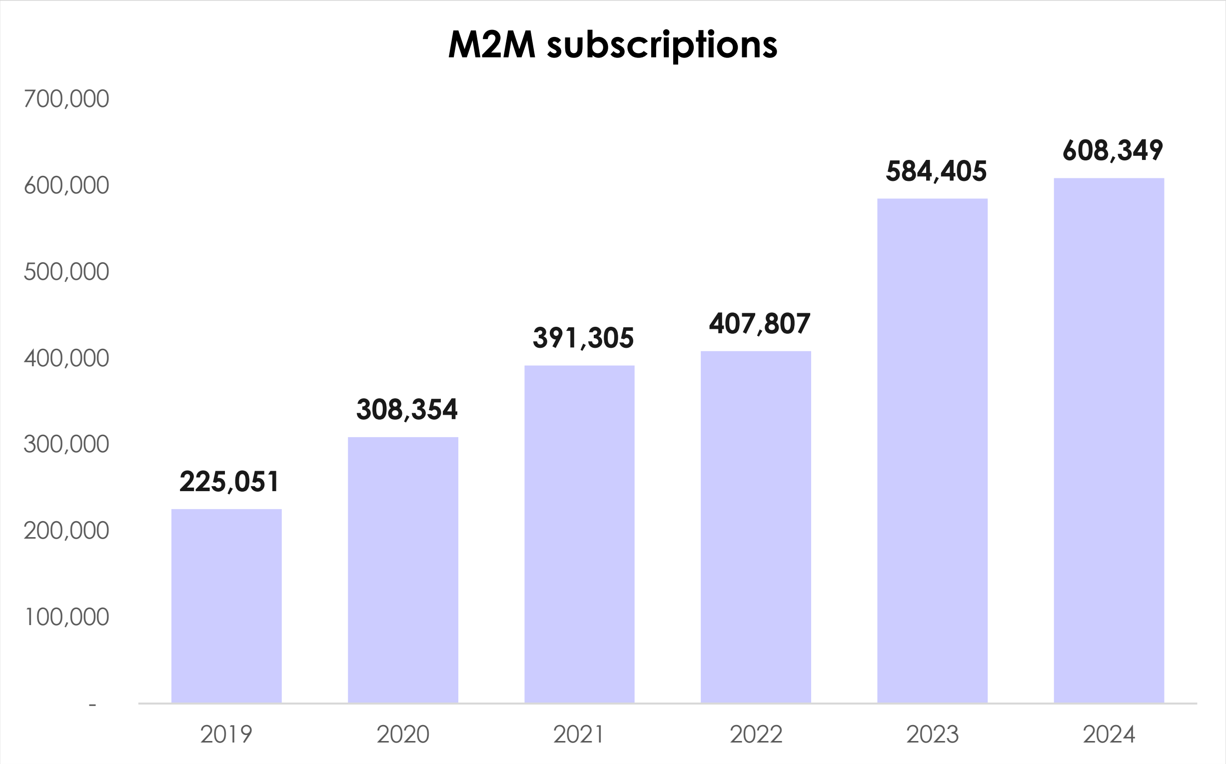
هيئة تنظيم الاتصالات
TELECOMMUNICATIONS REGULATORY AUTHORITY
Kingdom of Bahrain - مملكة البحرين

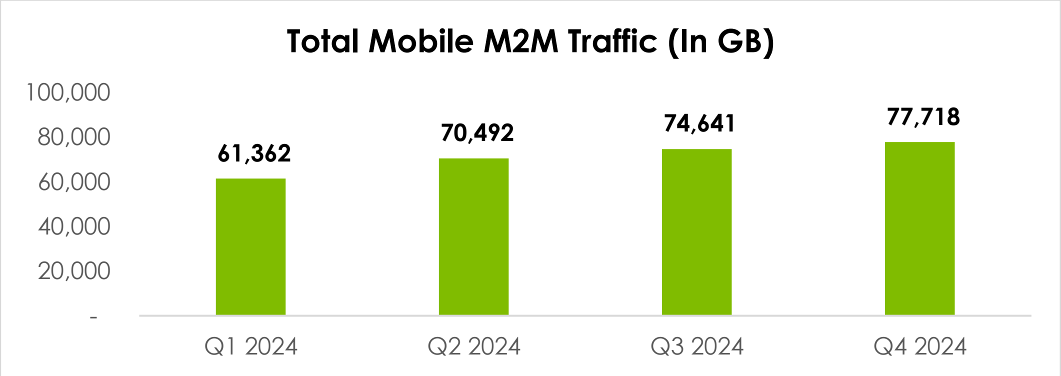


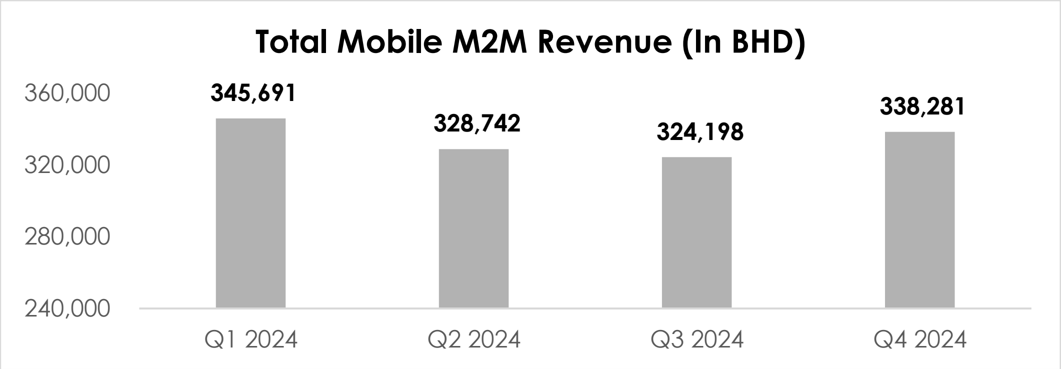


- In 2024, domestic leased lines revenue slightly dropped by 2% while International leased lines revenues increased by 10%.

Mobile M2M Subscriptions





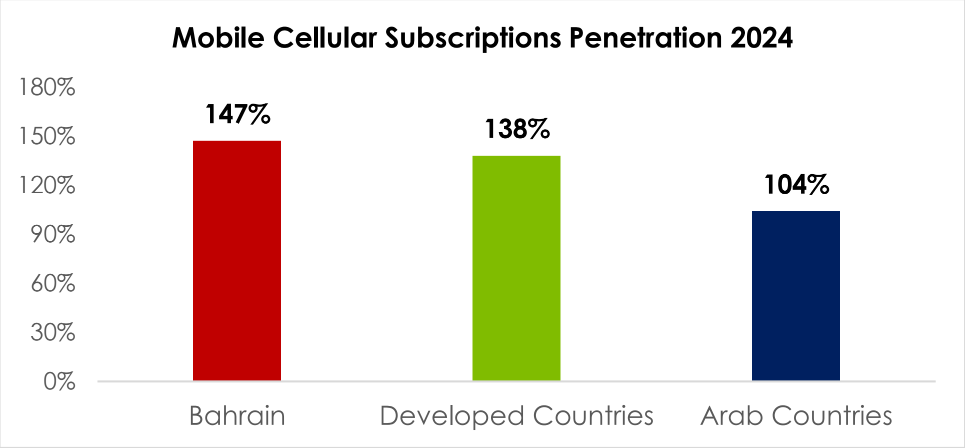


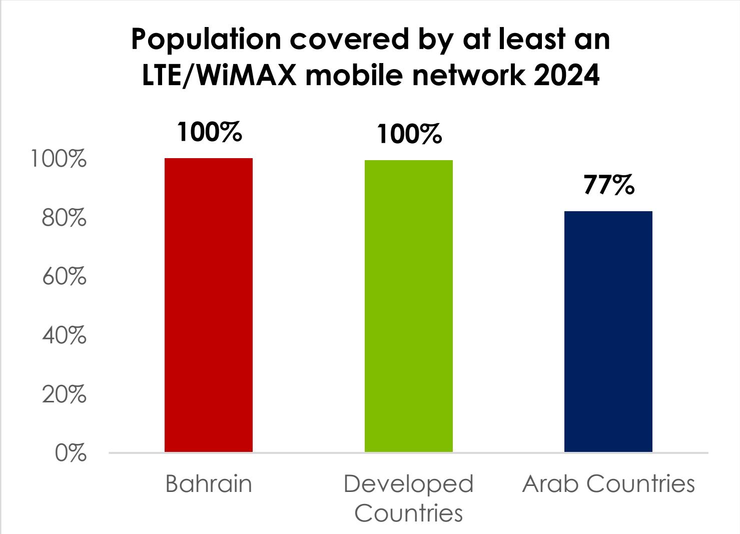
- M2M subscriptions have grown by around **200 thousand** subscriptions in the last 3 years. All in all, by 2024, M2M subscriptions increased **threefold** relative to 2019.
- M2M subscriptions include banking services, vehicle tracking, Point of Sales, Smart meters among other services.

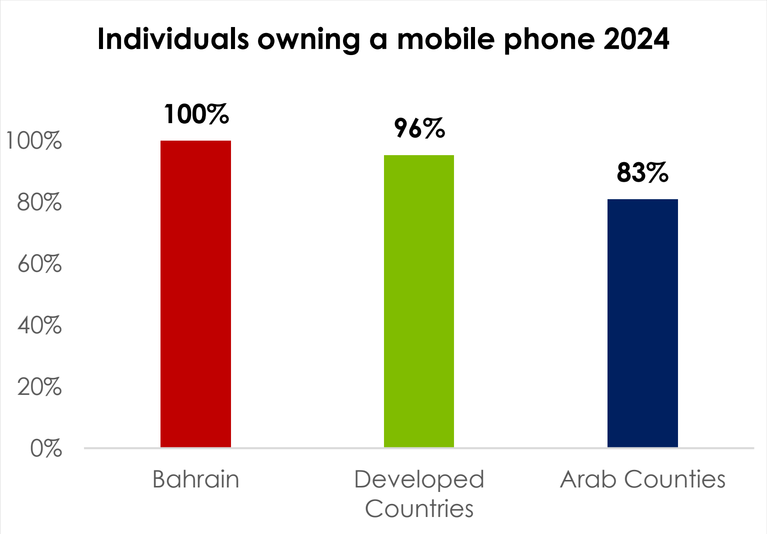
Benchmarking of telecom service penetration rates with Arab countries

- Bahrain compares very well with other Arab Countries and with Developed (high-income) countries** in terms of telecoms services penetration. Specifically in Mobile penetration and Percentage of Individuals owning a mobile.

** Estimates by ITU*
*** For further info on the list of developed countries, pls refer to ITU's official website.*







List of Acronyms

DSL	Digital Subscriber Line
BHD	Bahraini Dinar
CPS	Carrier Pre-Selection
CAGR	Compound Annual Growth Rate
GCC	Gulf Cooperation Council
IDD	International Direct Dial
ITU	International Telecommunication Union
Kb/s	Kilobit per second
Mb	Megabit
Mbps	Megabit per second
OLO	Other licensed operator
PPCC	Pre-Paid Calling Card
PSTN	Public Switched Telephone Network
PPP	Purchasing power parity
SMS	Short Message Service
TRA	Telecommunications Regulatory Authority

Definitions

هيئة تنظيم الاتصالات
TELECOMMUNICATIONS REGULATORY AUTHORITY
Kingdom of Bahrain - مملكة البحرين

Indicator	Definition
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 subscribers (i271p)	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 (i271pd)	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 (i271mw)	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)

Source: ITU

Thank you

Annex A

هيئة تنظيم الاتصالات
TELECOMMUNICATIONS REGULATORY AUTHORITY
Kingdom of Bahrain - مملكة البحرين

Retail services	**2021**	**2022**	**2023**	**2024**
Fixed line services	12,365,078	10,400,022	9,807,622	11,070,801
Mobile services (Excluding International Mobile IDD)	132,918,723	142,749,349	151,849,550	159,670,184
International calls - Mobile IDD	11,013,005	9,890,396	8,436,935	6,254,942
International calls - Fixed IDD	1,251,678	1,071,804	870,485	947,438
International calls - Other	357,711	255,750	199,874	178,382
International calls services	**12,264,449**	**10,962,199**	**9,307,419**	**7,202,380**
Internet services	69,168,428	69,153,388	70,529,755	65,940,587
Leased line services	84,576,580	65,345,373	66,055,499	71,177,243
Total	**309,423,525**	**298,610,331**	**307,549,845**	**307,643,654**

Wholesale services	**2020**	**2021**	**2023**	**2024**
Termination	2,797,238	2,646,132	2,281,435	2,073,698
Origination	110,117	45,743	57,201	57,502
WSIDD	1,211,175	1,327,363	385,439	279,996
Incoming calls				
Wholesale domestic leased lines	1,172,720	1,402,379	1,741,931	1,750,560
Wholesale international leased lines	1,879,297	2,662,819	1,932,183	2,161,147
Bitstream and WSDSL	21,332	2,855	-	-
Termination on your network of SMS	4,208,133	4,696,389	6,242,455	7,361,594
Termination on your network of MMS	5,790	5,122	1,958	117
Transit for calls				
International incoming calls	2,582,294	2,828,388	2,158,932	2,182,511
Directory Assistance (DQ) (Only Batelco)	51,088	34,371	22,733	17,645
Duct	N/A	N/A	N/A	N/A
Total	**14,039,184**	**15,651,562**	**14,824,267**	**15,884,770**

	2021	**2022**	**2023**	**2024**
Retail Services Revenue	309,423,525	298,791,994	307,549,845	307,643,654
Wholesale Services Revenue	14,039,184	15,679,555	14,824,267	15,884,770
Other Revenue	164,311,553	199,321,851	220,296,094	228,017,236
Total	**487,774,262**	**513,793,400***	**542,670,206**	**549,652,392**

* 2019-2022 revenue amended.