



هيئة تنظيم الاتصالات

Telecommunications Regulatory Authority

مملكة البحرين -

## Quarterly Market Indicators

Q1 2017



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# Mobile services: Subscriptions



By the end of Q1 2017, 2.7 million mobile subscriptions were reported; which is a 10% decrease from Q4 2016 and a 2% increase compared to Q1 2016.



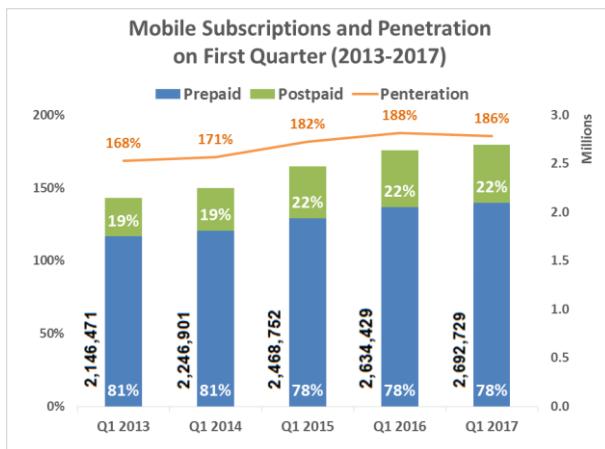
Mobile penetration rate was 186% by the end of Q1 2017.



By the end of Q1 2017, 78% of total mobile subscriptions were prepaid mobile subscriptions, down from 81% at the end of Q4 2016.



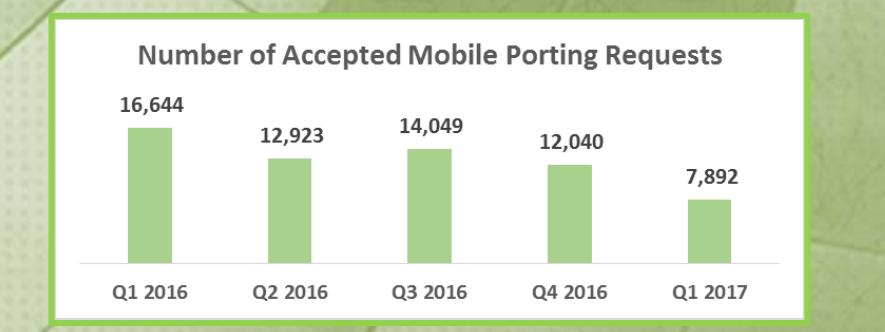
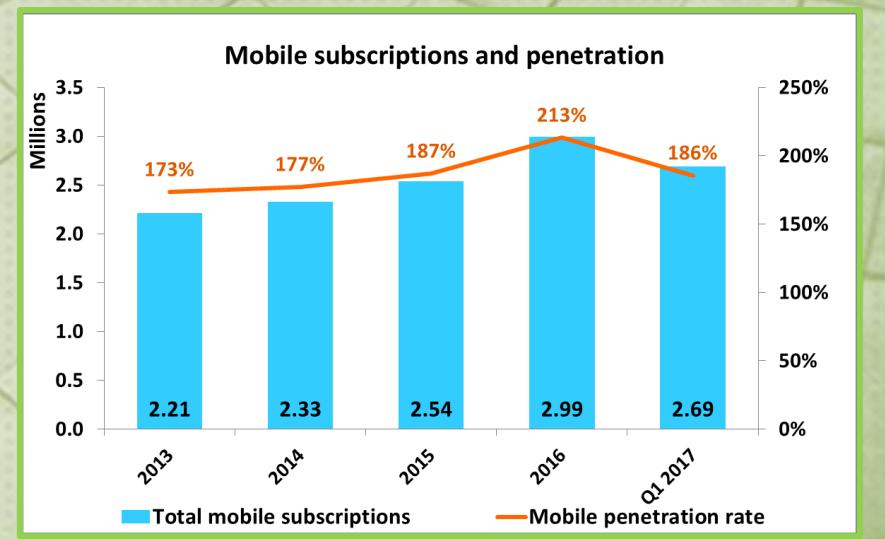
7,892 mobile numbers were successfully ported during Q1 2017, a 52% decrease compared to Q1 2016.



\*Based on 2017 mid-year population estimated by CIO 1,451,200  
Source: TRA analysis based on operators data.



	2013	2014	2015	2016	Q1 2017
<b>Total</b>	2.21 m	2.33 m	2.54 m	2.99 m	2.69 m
% of Prepaid	80%	78%	78%	81%	78%
% of Postpaid	20%	22%	22%	19%	22%



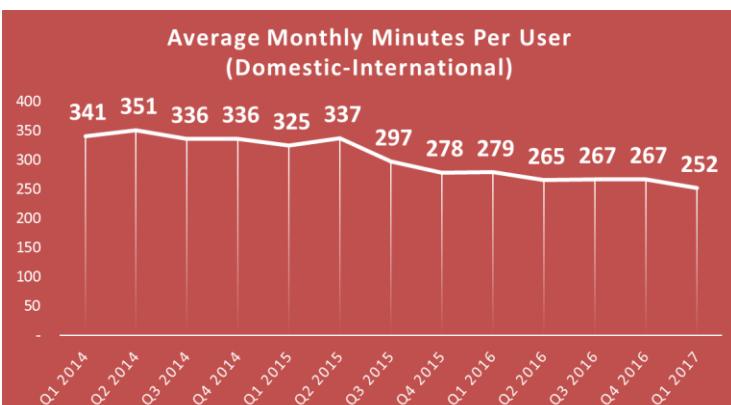
## Mobile services: Voice Traffic (Minutes)\*

 In Q1 2017, the total outgoing mobile minutes decrease by 3% compared to Q1 2016.

 The total domestic mobile voice traffic has decreased by 13% (206.6 million minutes) in Q1 2017 compared to Q1 2016 whereas the total international mobile voice traffic increased by 25% (138.8 million minutes).

 Prepaid voice traffic continued to account for the majority of outgoing domestic mobile calls and represents 61% of total domestic mobile voice traffic.

 In Q1 2017, the monthly average minute per user reached 252 minutes compared to 279 minutes in Q1 2016.



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

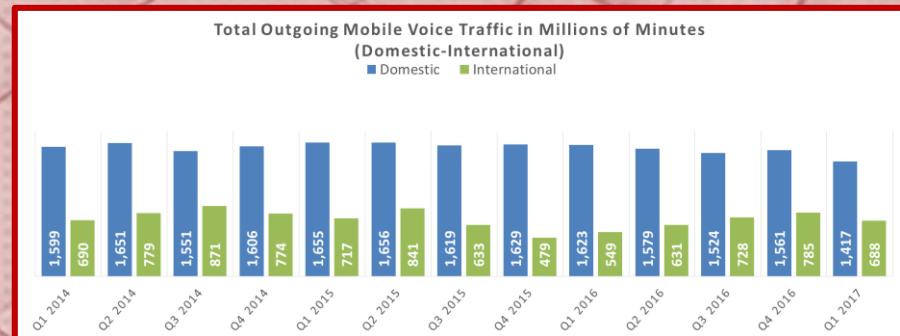
△ (3%)

Q1 2016

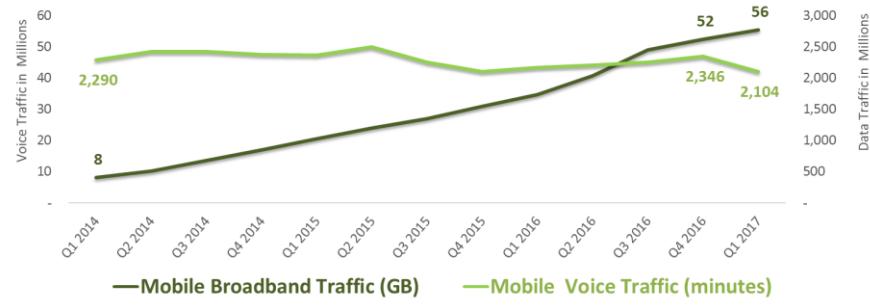
2,172,204,810

Q1 2017

2,104,467,573



### Mobile Voice Traffic Vs Mobile Broadband Data Traffic



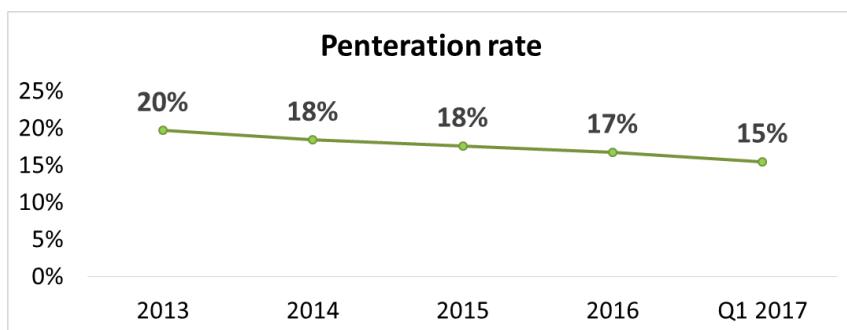
\*1- Domestic traffic originated from mobile has been adjusted due to resubmission from an operator

2- International traffic has been adjusted by eliminating roaming traffic

# Fixed telephony services: Subscriptions (PSTN & Wireless)

 In Q1 2017 the number of fixed telephony subscriptions decreased by almost 5% ( 224,592 down from 235,437 in Q4 2016).

 Despite the overall decrease of fixed telephony services, the fixed wired telephony services continue to increase as it has recorded an increased of 6,730 subscription from Q1 2016 to Q1 2017, comparing to decrease by (18,090) fixed wireless subscription over the same period.



\*Based on 2017 mid-year population estimated by CIO 1,451,200  
Source: TRA analysis based on operators data.

## Number of fixed line subscriptions

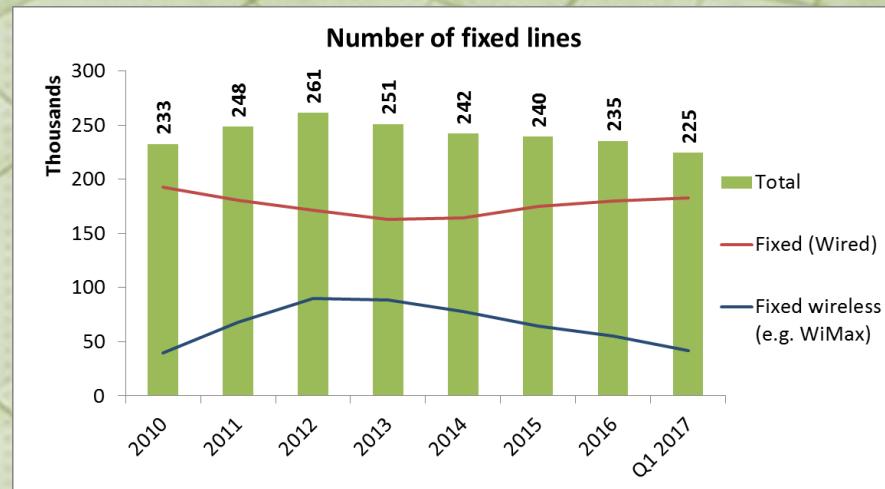
Q1 2017

**224,592**

15% penetration rate



Fixed lines	2013	2014	2015	2016	Q1 2017
Fixed wired	65%	68%	73%	76%	82%
Fixed wireless	35%	32%	27%	24%	18%
<b>Total</b>	251,074	242,090	239,521	235,437	224,592



## Number of Accepted Fixed Line Porting Requests

542

152

596

109

218

Q1 2016

Q2 2016

Q3 2016

Q4 2016

Q1 2017

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

 The Total fixed telephony domestic outgoing voice traffic continued to decline in Q1 2017, as it has decreased by 5% between Q1 2017 and Q4 2016 and by 21% compared to Q1 2016.

 The monthly average domestic outgoing minutes per subscription has decreased as it has reached 155 minutes in Q1 2017 compared with 195 minutes on Q1 2016.

 Despite the fact that major fixed telephony operators will continue to be the backbone of the telecommunications industry, consumer behavior has changed and the decline in subscription and traffic was caused by many factors, the main one being that fixed telephony is facing an intense competition from mobile and broadband services.

Total domestic outgoing traffic in minutes

△ (21%)

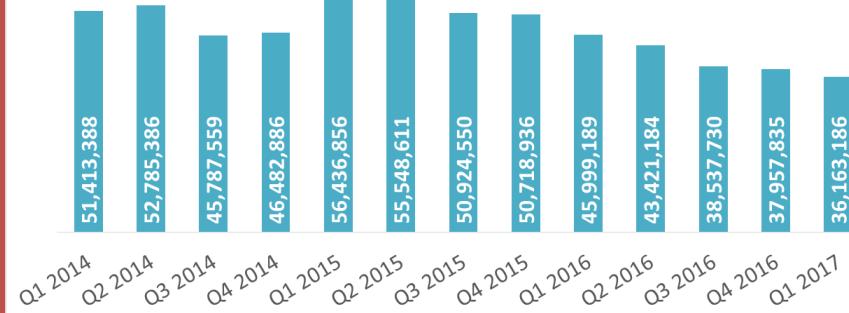
Q1 2016

**45,999,189**

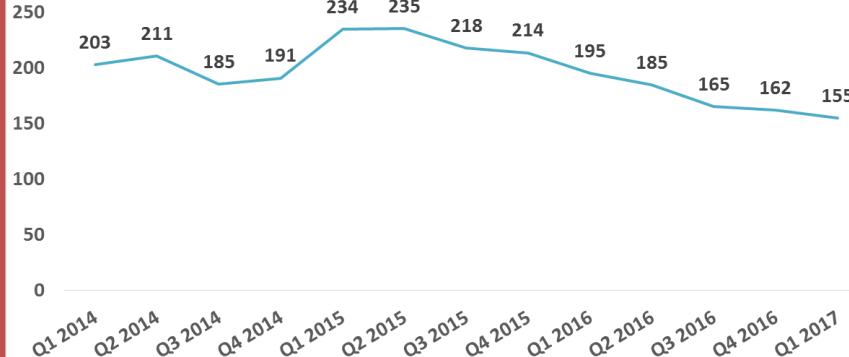
Q1 2017

**36,163,186**

Fixed Line Total Domestic Outgoing Traffic (Minutes)



Average Outgoing Domestic Minutes Per Subscription



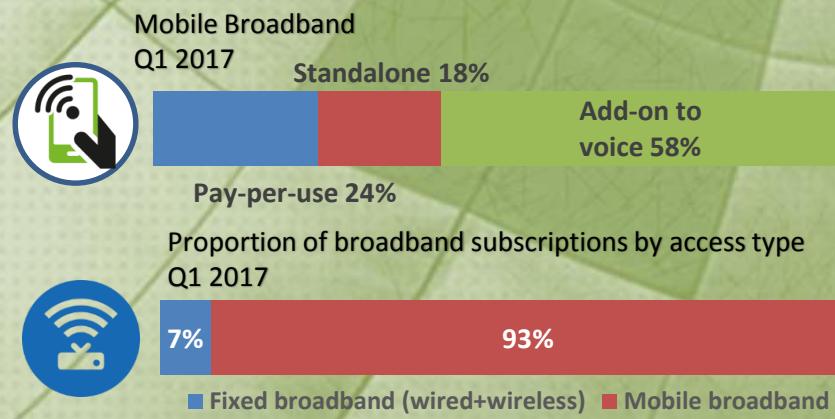
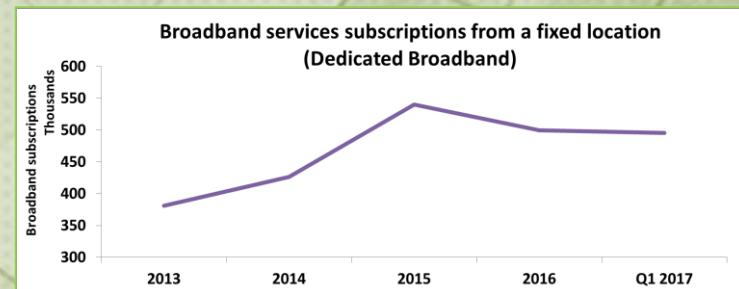
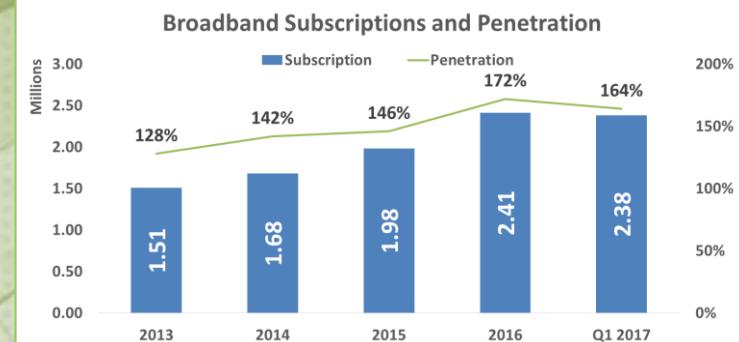
# Broadband services: Subscriptions

- By the end of Q1 2017, about 2.38 million broadband subscriptions were reported, which is a 17.5% increase compared to Q1 2016.
- Broadband penetration rate reached 164% by the end of Q1 2017.
- The main drive for the growth of broadband subscriptions is that the mobile broadband subscriptions represented 93% of total broadband subscriptions by the end of Q1 2017.
- Add-on broadband to voice and pay-per-use mobile broadband represented 82% of mobile broadband subscriptions by the end of Q1 2017.
- In Q1 2017, The overall fixed broadband has decreased by 6% compared to Q1 2016. The wireless broadband has decreased by 25% while the fixed broadband has increased by 19% over the same period, mimicking the same trend which occurred in fixed telephony.

\*Based on 2017 mid-year population estimated by CIO 1,451,200  
Source: TRA analysis based on operators data.

Number of broadband subscriptions

Q1 2017  
**2.38 million**  
164% penetration rate



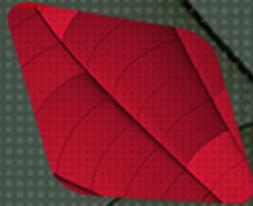
## Broadband services: Data Traffic

- Data traffic increased by 60% between Q1 2016 (61 million GB) and Q1 2017 (97 million GB).
- Mobile broadband traffic increased by 20.7 PB, an increase of 60% from Q1 2016 to Q1 2017, while the fixed broadband traffic increased by 16 PB, 61% over the same period.
- Despite the fact that mobile broadband traffic continued to account for the majority of total broadband traffic as it represented 51% in Q1 2017, the monthly average mobile broadband traffic per mobile subscription is 8 GB compared to 81 GB the monthly average fixed broadband traffic per fixed subscription.
- Overall, the monthly average traffic per user reached 13 GB in Q1 2017 compared to 10 GB in Q1 2016.



# Definitions

Indicator	Definition
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