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info@marketpublishers.com

Bahrain Telecommunications Report Q3 2016

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Abstracts

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BMI View: Despite several risks to economic growth and investment that include ongoing political instability and weak oil prices, Bahrain's mobile and wireline telecoms sectors continue to display healthy levels of competition and measurable benefits for telecoms customers. Bahrain still generates the second most attractive returns for operators in the Middle East and North Africa region. The ability to offer fixed and mobile services means that the country's three mobile operators can offer bundled services including triple-play and quadruple-play services. Investment in next-generation access technologies, such as fibreto- the-x, will meet the growing demand for high-speed connections. However, we continue to believe that the growth of the broadband market will be primarily driven by the proliferation of dedicated mobile broadband connections supported by investments in 3G and 4G network infrastructure.

Latest Updates & Industry Developments

> Bahrain's mobile market reached 2.54mn subscriptions at the end of 2015, for a penetration rate of 184.6%. We continue to expect the mobile subscriber growth rate to slow substantially in coming years with average annual growth of around 1.0% between 2015 and 2020. The discounting of inactive SIMs is a downside risk to our growth forecast.
>
> The launch of LTE has boosted the 3G/4G market, which reached 1.41mn subscriptions at the end of 2015, equivalent to 55.5% of the total mobile market.
>
> We estimate that Bahrain had 540,000 dedicated broadband internet connections at the end of 2015, equivalent to a penetration rate of 39.2%. We now forecast an average annual growth rate of 3.0% between 2015 and 2020,

with dedicated broadband penetration rising to just over 42.0% and 625,000 subscriptions in 2020.

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