



Q2 2018

Quarterly Market Indicators

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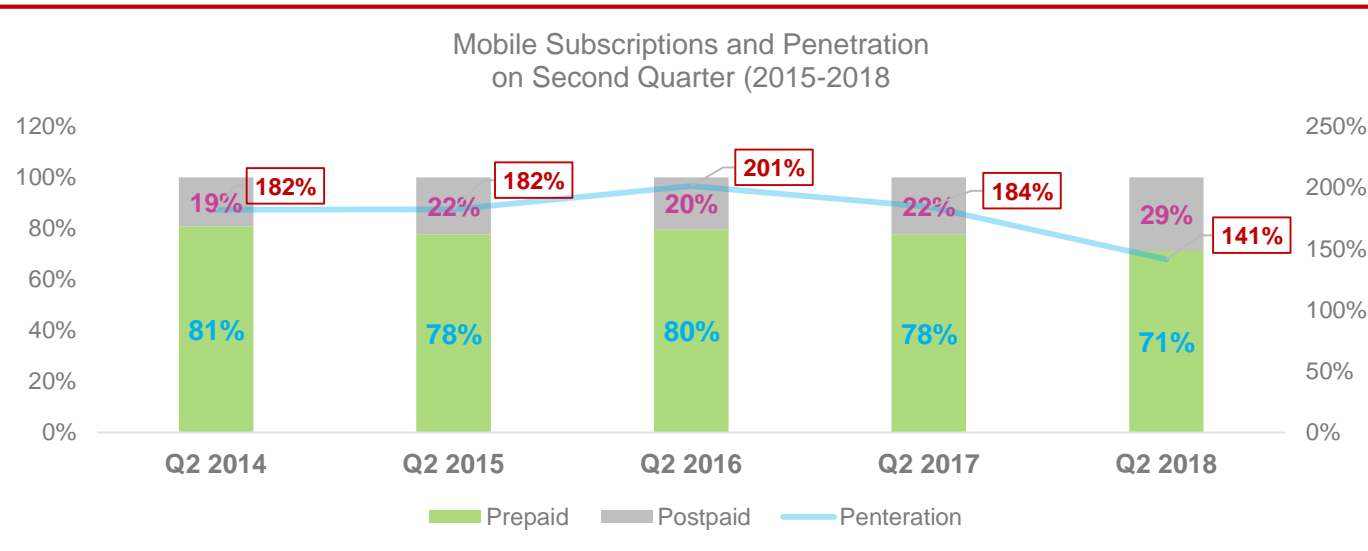
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Mobile services: Subscriptions

- By the end of Q2 2018, 2.19 million mobile subscriptions were reported; which is about a **7%** decrease from the end of 2017 and a **18%** decrease compared to Q2 of 2017.
- Mobile penetration rate was 141% by the end of Q2 2018. This decrease is attributed to the increase in the reported population number during 2018 and the **7%** decrease in number of mobile subscriptions compared to the end of 2017.
- The percentage proportion of Prepaid and postpaid mobile subscriptions had remained the same between the end of 2017 and Q2 of 2018.



* Population is based on CIO mid-year estimation

	2015	2016	2017	2018
	1,359,800	1,404,900	1,451,200	1,549,000

** Revised the number of accepted mobile porting requests for Q4 2017

Number of Mobile subscriptions

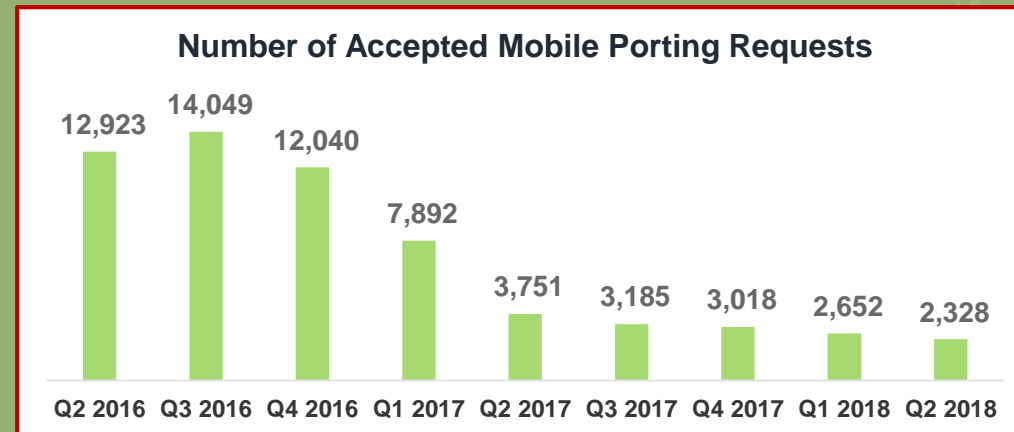
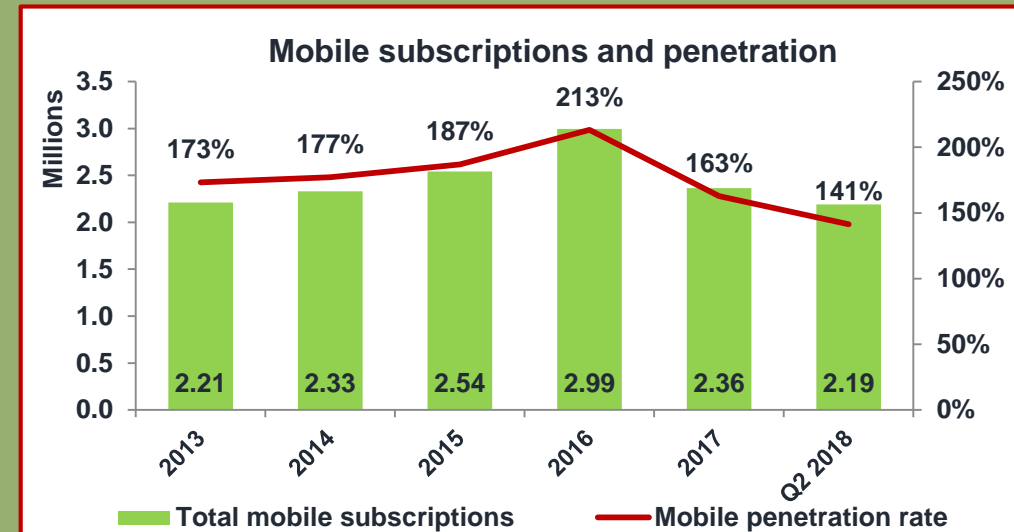


End of Q2 2018

2.19 million

141% Penetration rate

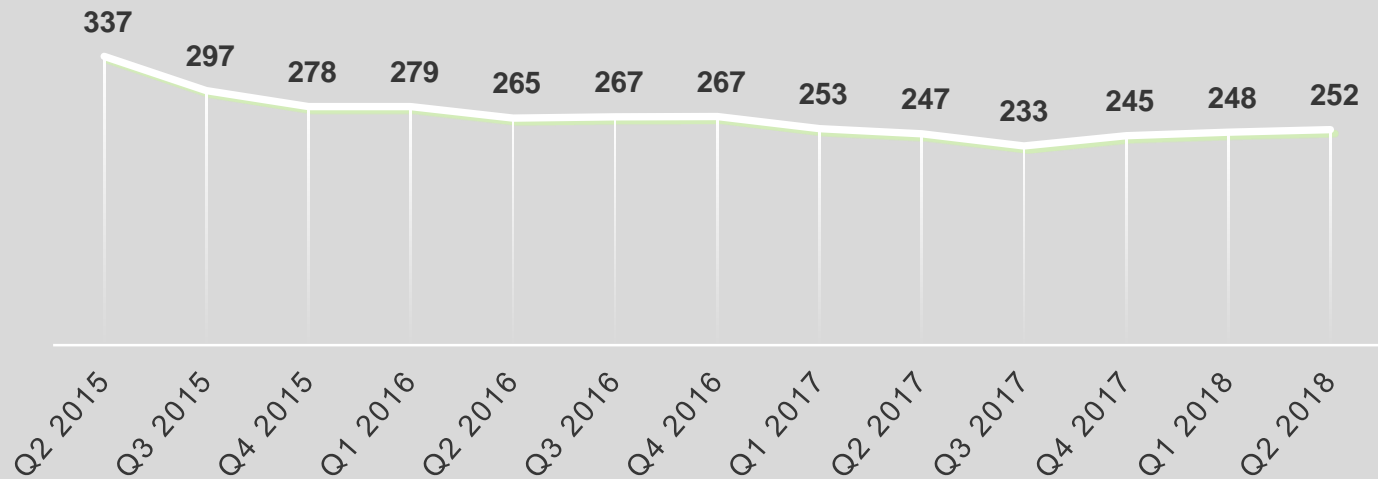
	2015	2016	2017	Q2 2018
Total	2.54 m	2.99 m	2.36 m	2.19 m
% of Prepaid	78%	81%	74%	71%
% of Postpaid	22%	19%	26%	29%



Mobile services: Traffic (Minutes)

- In Q2 2018, the total outgoing mobile minutes decreased by **16%** compared to Q2 2017.
- The Total domestic outgoing mobile traffic decreased by **13%** (184 million minutes) in Q2 2018 compared to Q2 2017, whereas the total international mobile outgoing voice traffic decreased by **23%** (193million minutes).
- Prepaid voice traffic continued to account for the majority of outgoing domestic mobile calls and represents 53% of total domestic mobile voice traffic in Q2 2018.

AVERAGE MONTHLY MINUTES PER USER (DOMESTIC-INTERNATIONAL)



Total Outgoing Traffic in Minutes (Domestic + International)

△ (16%)



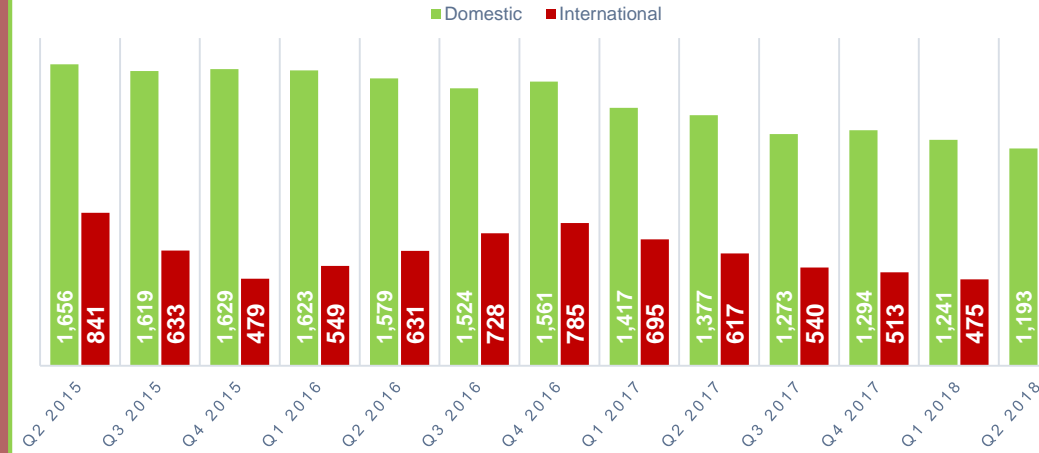
Q2 2017

1,994,346,747

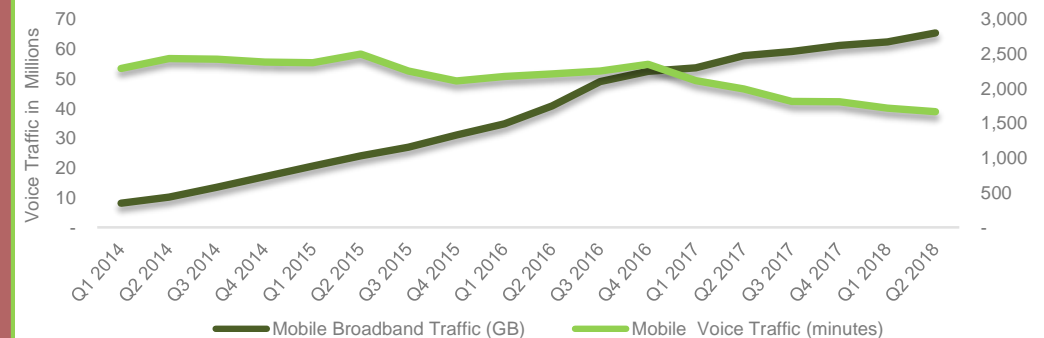
Q2 2018

1,667,426,449

TOTAL OUTGOING MOBILE VOICE TRAFFIC IN MILLIONS OF MINUTES (DOMESTIC-INTERNATIONAL)

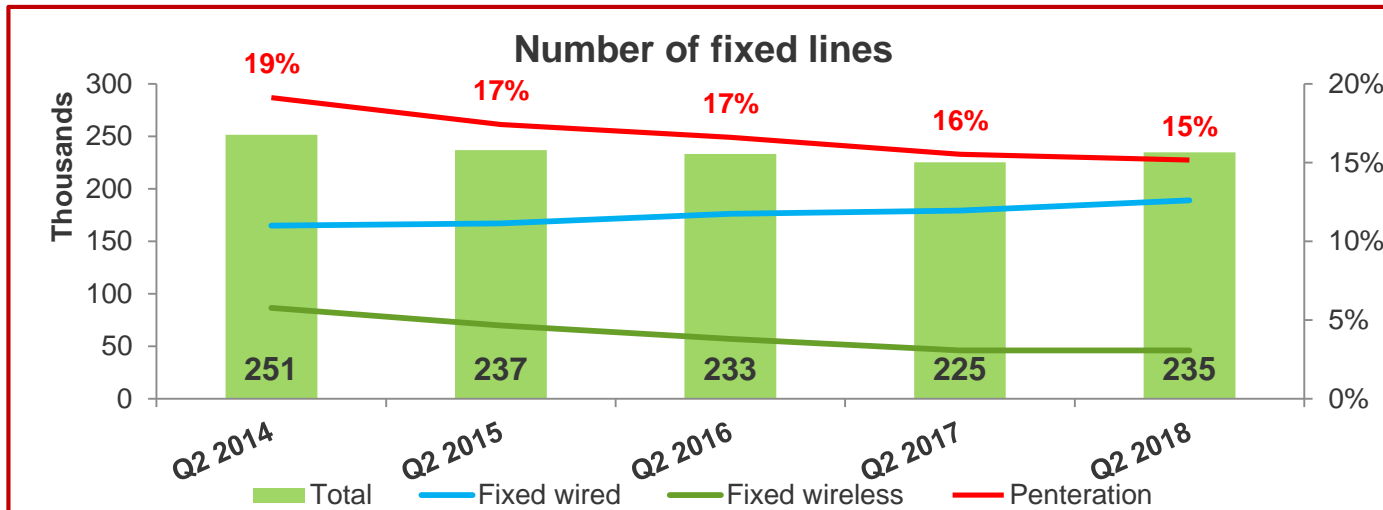


Mobile Voice Traffic Vs Mobile Broadband Data Traffic



Fixed telephony services: Subscriptions (PSTN & Wireless)*

- In Q2 2018, the number of fixed telephony subscriptions increased slightly compared to the end of 2017.
- The fixed-wired telephony services continue to increase, as it has recorded an increase of **9,612** subscription from end of Q2 2017 to of Q2 2018.
- Fixed line porting requests decreased to **109**, almost half of Q1 2018 and 9% of Q4 2017. This is due to the nature of ported fixed numbers as they are usually businesses and tend to port all their numbers, which explain the sudden increase or decrease over the quarters.



* The number of OLO's subscriptions' are estimated for 2018. The number of fixed telephony were revised in for 2017 subscriptions

Number of fixed telephony subscriptions

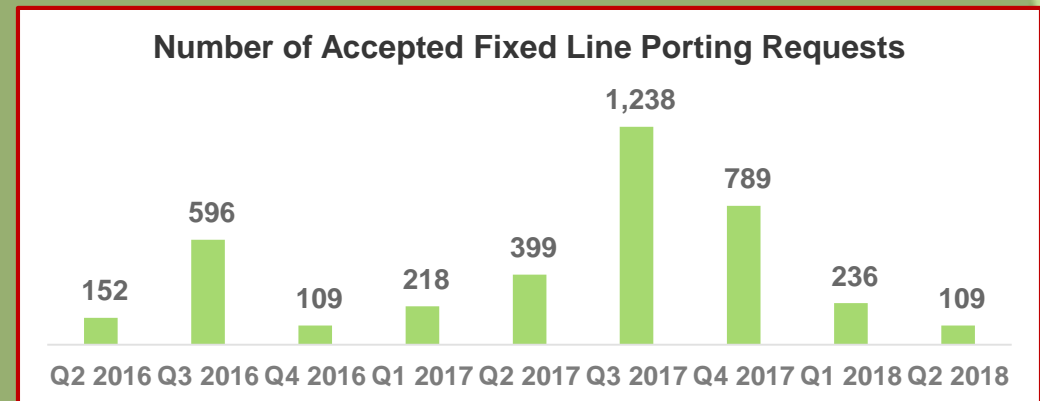
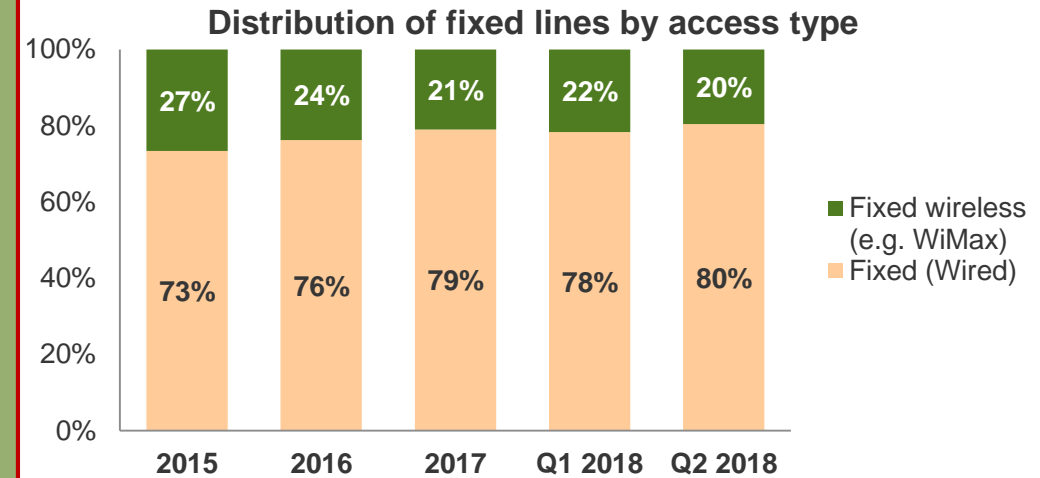


End of Q2 2018

234,857

15% Penetration rate

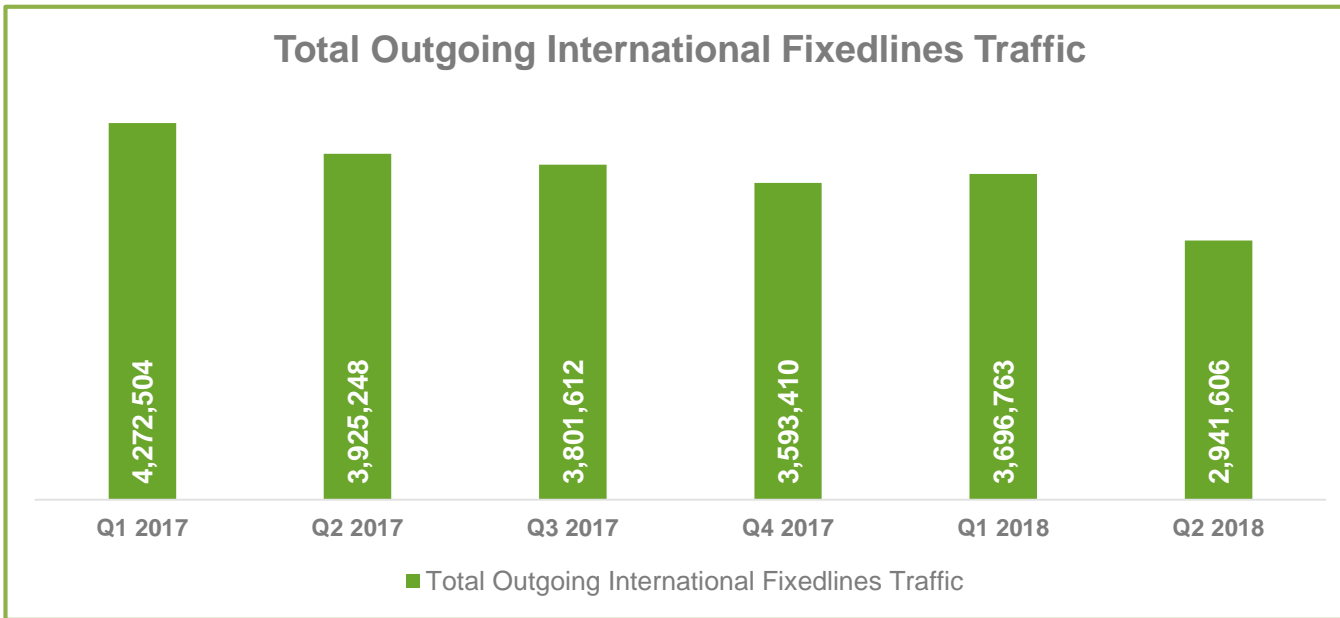
	2015	2016	2017	Q2 2018
Total	242,439	233,917	234,709	234,857
% of Fixed Wired	73%	76%	79%	80%
% of Fixed Wireless	27%	24%	21%	20%



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

- The Total fixed telephony domestic outgoing voice traffic continued to decline in Q2 2018, as it has declined by **13.5%** between Q2 2018 and Q2 2017, and by **2%** compared to Q1 2018.
- The monthly average outgoing minutes per subscription decreased to **111** minutes in Q2 2018 compared to 154 minutes in Q2 2017.

Total Outgoing International Fixedlines Traffic



Total fixed domestic outgoing traffic in minutes

△ (13.5%)

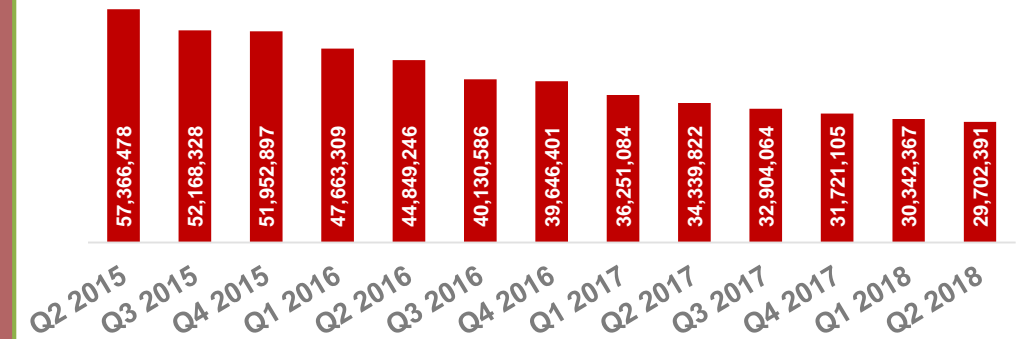
Q2 2017

34,339,822

Q2 2018

29,702,391

Fixed Line Total Domestic Outgoing Traffic (Minutes)



Average Outgoing Domestic Minutes Per Subscription

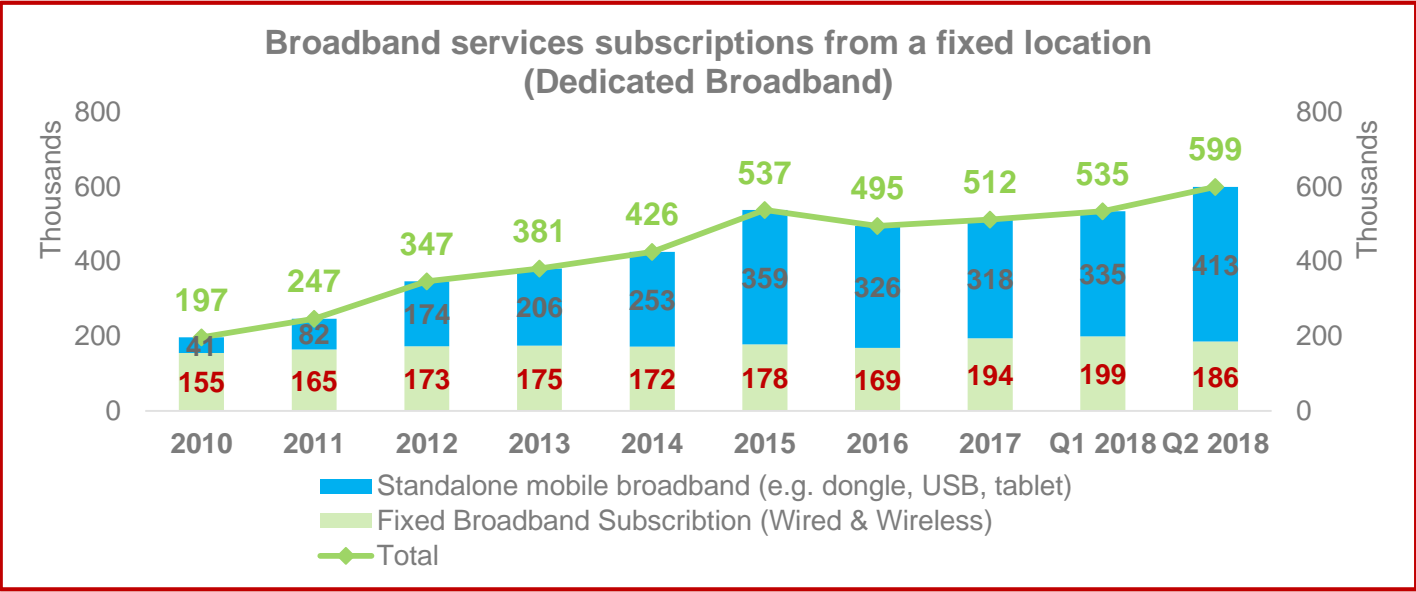


* The OLO's traffic (minutes usage) is estimated for 2017

** The OLO's traffic was revised from Q4 2014 to Q4 2016

Broadband services: Subscriptions

- At the end of Q2 2018, there were about 2.3 million broadband subscriptions, a decrease of 3% compared to end of 2017.
- Broadband penetration reached **148%** at the end of Q2 2018.
- While Mobile broadband has decreased by **5%**, Fixed broadband has increased by **10%**.
- Add-on broadband to voice and pay-per-use mobile broadband represent 65% of mobile broadband subscriptions at the end of Q2 2018.

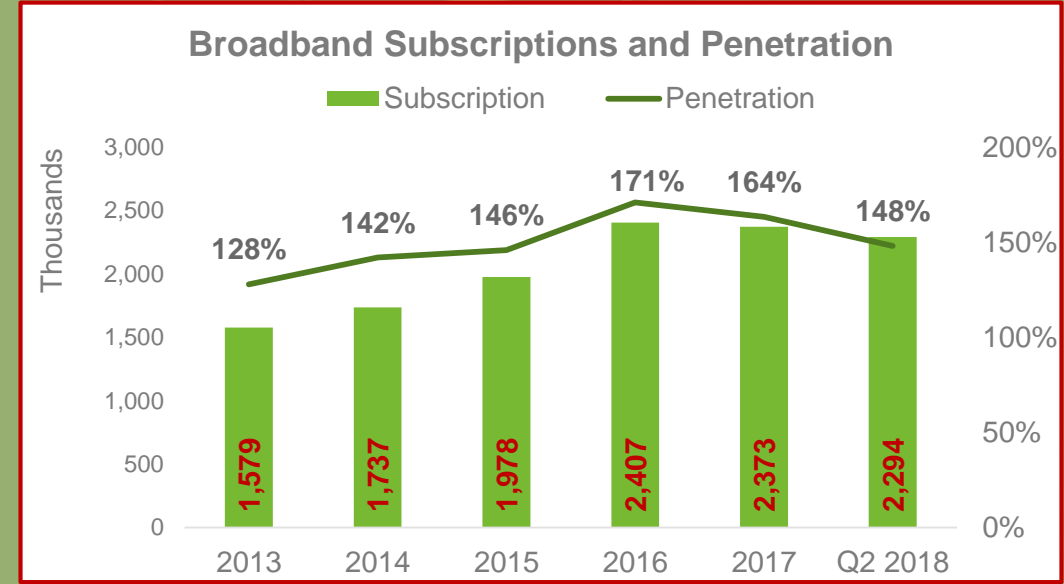


* The number of OLO's subscriptions are estimated for 2017 and 2018.

Number of broadband subscriptions



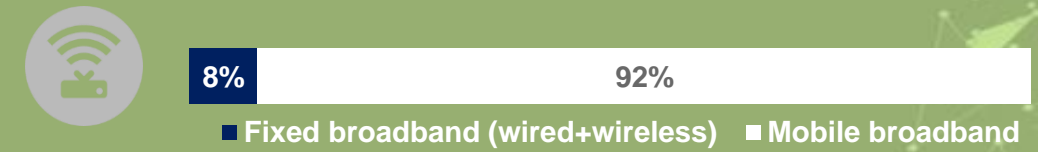
End of Q2 2018
2,293,607
 148% Penetration rate



Mobile Broadband – Q2 2018



Proportion of broadband subscriptions by access type – Q2 2018

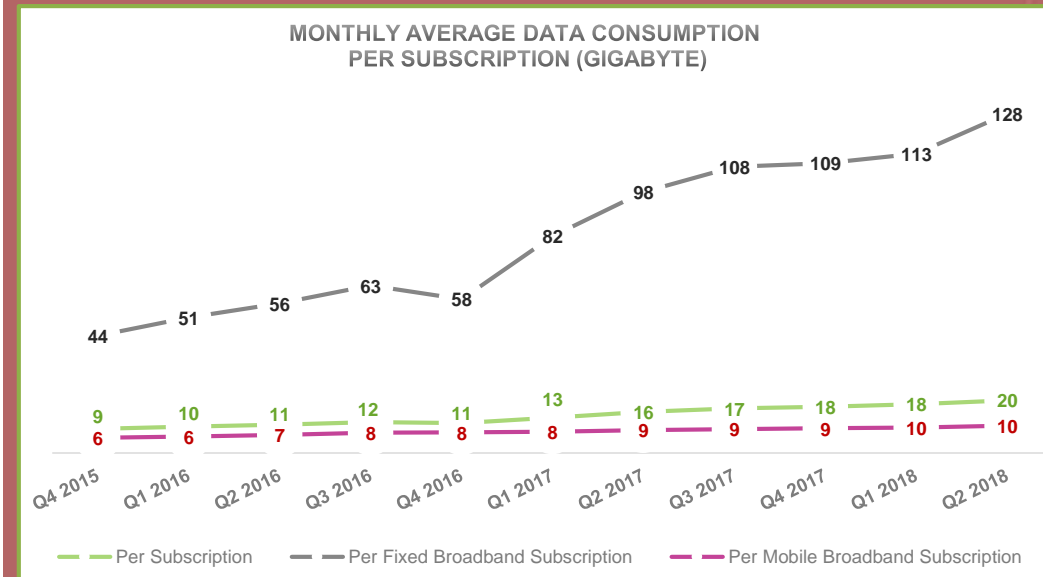
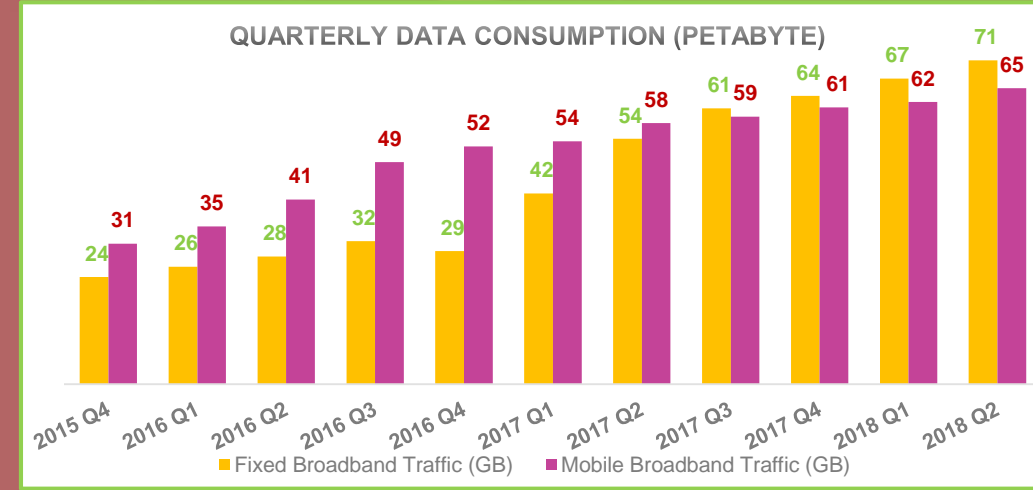
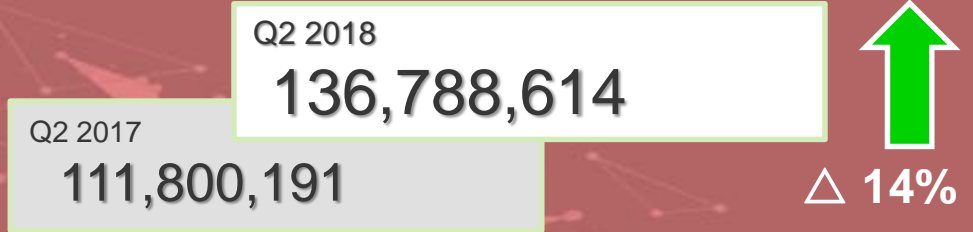


Broadband services: Data Traffic

- Data traffic increased from 111.8 million GB in Q2 2017 to 136.7 million GB in Q2 2018, a **22%** increase.
- Mobile broadband traffic has increased by 7 PB, an increase of **12%** from Q2 2017 to Q2 2018, while the fixed broadband traffic has increased by almost 17 PB, a **31%** increase over the same period.
- The monthly average mobile broadband traffic per mobile subscription is 10 GB compared to the monthly average fixed broadband traffic per fixed subscription, which is 128 GB.
- Overall, the monthly average traffic per user is 20GB in Q2 2018 compared to 16 GB in Q2 2017.

* The OLO's traffic (data usage) is estimated for 2017 and 2018
 ** Revised Q1 2017 mobile data traffic from 97.5 PB to 95.5 PB

Total data traffic in Gigabyte



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	<p>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:</p> <p>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.</p> <p>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).</p> <p>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.</p>



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