



## Bahrain ICT Market Overview

- Bahrain is among the region's – and the world's – most vibrant and advanced markets for ICT services, with high penetration of mobile cellular and broadband Internet, low prices, and a top-performing regulator (TRA) that has been repeatedly recognized internationally for its forward-looking approach to ICT development.
- Fixed-telephone subscriptions in Bahrain reached 290,000 at end 2013, with a penetration of 22 subscriptions per 100 inhabitants – well above the world average of 16% and the Gulf Cooperation Council average of 17%.
- Mobile-cellular subscriptions reached almost 2.2 million at end 2013, with a penetration of 166 subscriptions per 100 inhabitants – well above the average penetration in Arab countries (110%) and the average global penetration (96%).
- At end 2013, 82% of households in Bahrain had Internet access while more than 90% had computers – making the country one of the world's most connected nations.
- By end 2013, fixed (wired) broadband subscriptions in Bahrain reached 175,000, with a penetration of 13 subscriptions per 100 inhabitants – the highest penetration among the Gulf Cooperation Council countries (average of 7.6 subscriptions per 100 inhabitants) and above the world average penetration of 10%. Additionally, fixed wireless broadband is also popular in Bahrain, with 9 subscriptions per 100 inhabitants in 2013, representing 8% of all wireless broadband subscriptions.
- Bahrain's mobile-broadband market is growing fast, and has reached around 1.5 million active mobile-broadband subscriptions by end 2013, a penetration of 115% – well above the world (32%), the Arab states (24%), and Gulf Cooperation Council (62%) penetration.
- ICT services in Bahrain are very affordable: Bahrain ranked 34<sup>th</sup> in the ICT Price Basket (IPB) with a value of 1.2 in 2012. Prices for all three services included in the IPB are relatively affordable, with fixed-telephone prices being the cheapest at 0.4 % of GNI per capita, followed by mobile-cellular prices at 1.1% of GNI per capita and fixed-broadband prices at 2% of GNI per capita.
- Bahrain is one of a handful of countries that has already achieved the [Broadband Commission target for affordable broadband service](#) – which is below 5% of GNI per capita.

## Regulatory snapshot

- The Telecommunications Regulatory Authority (TRA) was established in 2002 through the adoption of the *Telecommunications Law of 2002* and the first Telecommunication National Plan, as part of the reform process launched by the government which focused on measures to introduce and foster competition as well as protect the interest of consumers.
- Batelco, the partially private incumbent operator, faces competition from Zain and Viva (licensed in 2003 and 2009 respectively) in the mobile market and from WiMAX-based operators in fixed broadband services. Full competition was introduced in fixed domestic and international, international gateways, satellite and Internet services in 2004. Number portability for fixed and mobile services was launched in 2011. Investors face no restrictions to foreign ownership in ICTs.
- The second National Telecommunication Plan published in 2008, recognized the need to nurture competition, to create an environment conducive to investment and to enhance the use of broadband and Internet services. The third National Telecommunication Plan, released in 2012, identifies measures to strengthen Bahrain's ICT competitiveness and readiness to support the fast-growing digital economy.
- Spectrum licenses were granted in 2013 in the 900MHz/1800MHz/2100MHz bands to the three mobile operators, in order to assist in delivering higher broadband speeds wirelessly. Commercial LTE services began to be provided to consumers during 2013, with all operators providing LTE services by early 2014.
- The licensing of WiMAX-based operators has further increased the competitiveness of fixed broadband services in the country, where prices have fallen by up to 80% since 2008\*. TRA has been named the [region's best regulator by CommsMEA](#) for the past five consecutive years, and won the award of Regulator of the Year from SAMENA Telecommunications Council in 2011.

Find more information in ITU's flagship ICT regulatory and statistics reports, [Trends in Telecommunication Reform- Special Edition](#) and [Measuring the Information Society 2013](#).

Global broadband snapshots for countries worldwide can also be viewed through Google Maps with ITU's [Broadband Atlas](#).

\*Based on the results of a study commissioned by the TRA on behalf of AREGNET (the Arab Regulators Group) in 2013.