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Jordan Telecommunications Report Q3 2016

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Abstracts

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BMI View: In our latest update on Jordan's telecommunications market we have made minor adjustments to our forecast for the country's mobile market. The latest operator data for Q415 suggest that the market performed significantly better in 2015, compared with FY14 when the market witnessed the termination of a significant number of inactive SIMs. 4G launch efforts by all three operators are bearing fruit in the country, and we believe that this will empower organic growth in the mobile market sector. However, we continue to caution that the market remains saturated with a high degree of penetration and a strong consumer preference for prepaid, low-value services. Over our five year forecast period to 2020, growth will come from the 4G services sector, and a possible move towards converged plans that could drive revenue upwards while keeping competition strong.

Latest Updates & Industry Developments

The latest available data for the final quarter of 2015 shows that the mobile market performed well during the year, with net additions of 570,000 subscribers in the 12 months to December 31. The market ended 2015 with a total of 10.39mn subscribers.

The wide spread launch of 4G services in 2015 and high uptake expected in 2016 and beyond will deliver organic growth opportunities in a saturated market. We believe that carrier efforts to migrate users from prepaid low-value services to postpaid plans will prove crucial for growth prospects and revenue generation.

Unlike fixed voice, the fixed broadband market saw strong growth in 2015, at a rate of 16.7% to reach more than 2.0mn connections. By 2020, we expect the

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number of connections to reach 3.2mn, for a penetration rate of over 39%.

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