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Abstracts

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BMI View: We believe that organic subscription groth in the Oman mobile industry may be difficult as the two current operators, Omantel and Ooredoo are facing stiff competition on the price level by an increasing number of MVNOs in the market. Furthermore, Oman's market is driven by a very high percentage of prepaid subscribers and both the operators have failed to attract customers to higher value postpaid packages. Little subscription growth opportunity means retaining subscribers is equally, if not more, important than attracting new ones. Omantel and Ooredoo will achieve this by migrating subscribers on to shared data multi-play and packages, increasingly including smarthome solutions, thus deepening their relationships with customers. Meanwhile, though mobile remains the dominant broadband access technology, we expect Oman Broadband Company's deployment of an open access national fibre network to deepen penetration of wireline connections, and to enable Ooredoo and smaller alternative players to compete more effectively with incumbent Omantel in the wireline market. The 'smart cities' initiative is a positive one and we believe it will help Omani infrastructure with wireline and fixed broadband growth over the next few years as 80% of Muscat and 25% of towns and villages nearby will receive fibre optic access.

Key Data

The mobile market maintained stable growth of 2.6% q-o-q in Q215 to 6.4mn subscriptions, driven by Ooredoo and MVNOs.

Wireline voice connections grew strongly by 8.3% in Q115, bucking the regional trend of fixed-tomobile substitution.

Broadband was the fastest growing segment, with over 20.6% y-o-y growth to

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2.3mn subscriptions. This was also reflected in broadband internet revenues in Q215.

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