

# Oman Telecommunications Report Q3 2016

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## Abstracts

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**BMI View:** The issue regarding licensing a third mobile operator in Oman has receded, and with good reason. Saturation and MVNO-driven price competition do not make it viable for a start-up to enter this mature market. Ooredoo's nascent alternative wireline business is most at risk from the licensing of Awasr as a Class 1 public telecommunications network operator. New wireline operator Awasr has secured a Class 1 general fixed telephony licence, complementing its concession to provide wireline broadband infrastructure and services in Oman. As Oman is one of the few markets where the multinational group has reported positive revenue and profit growth, the newcomer poses a particularly potent threat. Omantel launched an IPTV service in January 2016, spearheading its assault on the nascent converged services market where Ooredoo is at a comparative disadvantage. As a result, BMI upgraded its wireline outlook to 2020.

### Latest Updates And Industry Developments

Mobile subscription growth was stronger than expected in 2015 as MVNOs outperformed. We forecast 6.83mn subscriptions by end-2016, rising to 6.98mn in 2020. 3G/4G migration will see such subscriptions rise from 3.73mn to 5.07mn over the same period.

Muted demand for low-capacity wireline broadband will impede broadband market growth, but fibre connections will facilitate uptake of high-value converged services. Subscriptions will fall to 2.90mn in 2020, but will yield higher ARPU, particularly for Omantel.

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