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Abstracts

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BMI View: The possible entry of a third player into the mobile market, plus strong competition in the form of MVNOs, will keep mobile growth in positive territory, despite near saturation. We expect established operators Omantel and Ooredoo to respond to additional competition in the mobile market with a wider range of converged service offerings. 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.

Key Data

The mobile market maintained modest growth of 0.7% q-o-q in Q115 to 6.24mn subscriptions, driven by Ooredoo.

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 20.6% y-o-y growth to 2.3mn subscriptions. This was also reflected in broadband internet revenues in Q115.

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