

Qatar Telecommunications Report Q1 2016

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Abstracts

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BMI View: We have made some positive upwards revisions to the Qatari mobile market forecast in our Q116 report update. The market performed well in 9M15, outperforming our initial forecasts. The growth has been propelled by infrastructure and economic development projects, the upcoming 2022 FIFA World Cup and the arrival of migrant families. Qatar benefits from a wealthy population which drives the demand for advanced data services, and a large migrant community which is a factor for growth. Operators have to cater to both segments, with the profitability coming from the former. High ARPU is underpinned by the uptake of LTE and fibre services in the country, as well as multiple-SIM ownership through multiple-device ownership (smartphone, tablet, dongle). This requires a high level of investment to meet demand and ensure a strong quality of service, especially on LTE networks. This gives the incumbent an advantage, as its rival has not made a profit in the market since launching in 2009.

Latest Updates & Industry Developments

The mobile market added an impressive 564,000 new subscribers in 9M15, ending Q315 with a total of 4.689mn. We anticipate stable growth prospects till the end of our forecast period, driven by infrastructure development and the 2022 FIFA World Cup.

Ooredoo has been investing in network upgrade and technological improvements, including developing 5G technological solutions with Ericsson.

The poor financial health of Vodafone Qatar continues to remain a crucial factor, as the operator has still not turned a quarterly profit since 2009.

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