

Qatar Telecommunications Report Q3 2012

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Abstracts

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Q112 results from Qatar's two principal telecommunications operators were better than had been expected, following a relatively poor performance in the fourth quarter of 2011. This has enabled BMI to raise our forecast growth rates relating to mobile subscriber additions and ARPU evolution. However, the latest quarterly data shows fixed-line and broadband adoption rates were within expectations; accordingly. We have not revised forecasts for these sectors.

The improvements in the mobile sector were not sufficient to force any changes to Qatar's scores within BMI's Risk/Reward Ratings analysis and so Qatar remains in fourth place relative to its neighbours in the Middle East and North Africa (MENA) region. Vodafone Qatar outperformed incumbent Qtel in terms of customer additions during Q112, adding almost double the number of customers its rival achieved. However, Qtel still accounts for well over two-thirds of the mobile market and its more attractive subscriber mix - which increasingly leans towards more valuable postpaid services - means its revenue and ARPUs are growing faster than Vodafone's. The company is also deriving a healthy income from non-voice services and data ARPUs are growing well. Vodafone, too, says that data revenue is offsetting contributions from voice services, although it is reluctant to say what proportion of revenue is now accounted for by data.

Vodafone's focus on prepaid services should stand it in good stead for the next two years or so, as it takes advantage of the country's growing attractiveness to tourists and businesses, turning to the country as a regional hub. However, Qtel has a more robust long-term strategy, leveraging its ability to provide converged service bundles via its disparate fixed-line and mobile networks. Securing deals to manage the communications networks in key residential and business developments, as well as

facilities such as New Doha International Airport gives Qtel the competitive edge and ubiquity necessary to keep the newcomer in check. Vodafone is slowly making forays into the fixed-line market, but still has not fully launched mass market services. Further delays will put its investment at risk. BMI forecasts continued growth in fixed-line services, buoyed by demand for Qtel's triple-play offerings. We envisage the number of connections rising from 317,000 in 2012 to 351,000 by the end of 2016. Broadband also has a role to play in this story. We continue to forecast broadband connections of all kinds rising from 352,000 in 2012 to 550,000 by 2016.

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