

Qatar Telecommunications Report Q4 2016

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Abstracts

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BMI View: Qatar's mobile market is growing robustly in subscription terms, but price competition is eroding core service revenues and profit margins. Growth is linked to expansion of the migrant workforce, but this will slow significantly in the medium term. The market benefits from a wealthy population and there is untapped demand for advanced data services, particularly among businesses. Growing interest in video content is also evident, boding well for service diversification strategies.

Latest Updates & Industry Developments

The mobile user base expanded by 9.7% in 2015, versus 10.8% in 2014. We now estimate that the market will end 2016 with 4.86mn mobile subscribers, rising to 5.42mn at the end of our forecast period in 2020.

Qatar ranks third in our Risk/Reward Index for the Middle East and North Africa, with a score of 59.0 compared to a regional average of 46.1. With the economy reliant on oil and gas exports, the ongoing slump in global energy prices could eventually pose downside risks to the country's growth outlook.

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