

United Arab Emirates Telecommunications Report Q1 2016

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Abstracts

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In the first nine months of 2015 the UAE mobile market saw a net increase of 542,000 subscribers. This is based on data reported by Etisalat and du, as well as the Telecommunications Regulatory Authority (TRA). We estimate that the total number of mobile subscriptions reached 17.12mn by the end of 2015, equivalent to a penetration rate of 187%. We expect the UAE mobile market to maintain positive growth throughout our forecast period, through to 2020, due to strong competition between Etisalat and du, as well as the continued influx of migrant workers and temporary visitors on the back of an improving economy, a stable political environment and major events in the country, such as the Dubai 2020 World Trade Expo.

By the end of 2020 we expect the number of mobile subscriptions to rise to 18.18mn. Growth across the market as a whole will be driven by migration to 3G/4G services and by a trend towards the use of multiple SIM-connected devices. Although mobile average revenues per user (ARPU) will continue to decline, we expect the pace of decline to become much more gradual as ARPU contraction becomes offset by growing consumer appetite for mobile data services.

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