

UAE: Operator Investments in Fiber, 4G and 5G Technologies to Support Data Revenue Growth

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Summary

The telecommunications market in the UAE will grow at a CAGR of 3.7% over 2016-2021, driven by the growth in the fixed and mobile data segments. Mobile data and fixed broadband revenue will grow, owing to the increasing adoption of 4G networks and fiber-optic technology. Fixed VoIP will be the fastest-growing segment aided by the growing adoption of triple-play services. Operators should focus on further diversifying their service portfolios by offering multiplay services to the residential segment and targeting M2M/IoT to business customers

Key Findings

- Overall telecom service revenue in UAE is estimated to increase by 3.7% over 2016-2021.
- The telecommunications market in UAE will see service revenue growth boosted by mobile data, fixed VoIP and fixed broadband segments.
- 4G will replace 3G as the largest adopted technology by 2019 as 4G network coverage expands and as appetite for faster speeds and additional content increases.
- The top two operators, Du and Etisalat, will account for 97.5% of the telecom market in UAE. Competition is expected to increase further following the implementation of fixed network-sharing agreements by the regulator

Synopsis

UAE: Operator Investments in Fiber, 4G and 5G Technologies to Support Data Revenue Growth,' a new Country Intelligence Report by Pyramid Research, provides an executive-level overview of the telecommunications market in the UAE today, with detailed forecasts of key indicators up to 2021. Published annually, the report provides detailed analysis of the near-term opportunities, competitive dynamics and evolution of demand by service type and technology/platform across the fixed telephony, broadband, mobile and pay-TV sectors, as well as a review of key regulatory trends.

The Country Intelligence Report provides in-depth analysis of the following:

- Regional context: telecom market size and trends in the UAE compared with other countries in the region.
- Economic, demographic and political context in the UAE.
- The regulatory environment and trends: a review of the regulatory setting and agenda for the next 18-24 months as well as relevant developments pertaining to spectrum licensing, national broadband plans, number portability and more.
- A demand profile: analysis as well as historical figures and forecasts of service revenue from the fixed telephony (including VoIP), broadband, mobile voice, mobile data and pay-TV markets.
- Service evolution: a look at changes in the breakdown of overall revenue between the fixed/pay-TV

and mobile sectors and between voice, data and video from 2016 to 2021.

- The competitive landscape: an examination of key trends in competition and in the performance, revenue market shares and expected moves of service providers over the next 18-24 months.
- In-depth sector analysis of fixed telephony, broadband, mobile voice, mobile data and pay-TV services: a quantitative analysis of service adoption trends by network technology and by operator, as well as of average revenue per line/subscription and service revenue through the end of the forecast period.
- Main opportunities: this section details the near-term opportunities for operators, vendors and investors in the UAE's telecommunications and pay-TV markets.

Reasons To Buy

- This Country Intelligence Report offers a thorough, forward-looking analysis of the UAE's telecommunications and pay-TV markets, service providers and key opportunities in a concise format to help executives build proactive and profitable growth strategies.
- Accompanying Pyramid Research's Forecast products, the report examines the assumptions and drivers behind ongoing and upcoming trends in the UAE's mobile communications, fixed telephony/VoIP, broadband and pay-TV markets, including the evolution of service provider market shares.
- With more than 20 charts and tables, the report is designed for an executive-level audience, boasting presentation quality.
- The report provides an easily digestible market assessment for decision-makers built around in-depth information gathered from local market players, which enables executives to quickly get up to speed with the current and emerging trends in the UAE's telecommunications and pay-TV markets.
- The broad perspective of the report coupled with comprehensive, actionable detail will help operators, equipment vendors and other telecom industry players succeed in the challenging telecommunications market in the UAE.

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