

# **Saudi Arabia - Telecommunication Services: A mature market with renewed growth opportunities (Strategy, Performance and Risk Analysis)**

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## **Abstracts**

Saudi Arabia - Telecommunication Services: A mature market with renewed growth opportunities (Strategy, Performance and Risk Analysis)

### **SUMMARY**

Saudi Arabia is the largest telecom market in the Middle East and has high mobile penetration rate of 72% but still presents an opportunity to grow. The broadband penetration rate, which is quite low is expected to increase from 11% in 2016 to 15% by 2021 as the government plans to invest in the development and maintenance of infrastructure to provide broadband connectivity to all the regions of Saudi Arabia under the national transformation plan.

MarketLine's Premium industry reports provide a comprehensive market view including sections on: industry risk & reward, key industry trends and drivers, industry SWOT analysis, industry benchmarking to compare key performance indicators with regional and global markets, competitive landscape, and innovation.

### **KEY HIGHLIGHTS**

Fixed Internet revenue shows growth

Fixed segment revenue increased from US\$3,780.2 million in 2012 to US\$4,098.0 million in 2016 at 2.0% CAGR during 2012-2016 and is further expected to grow at 2.3% CAGR for 2016-2021 is expected to increase to US\$4,582.4 million by 2021. The increase in the fixed line revenue will primarily be because of the increase in the

Internet revenue between 2016 and 2021. In terms of ARPS, Fixed voice ARPS is expected to decline from US\$66.8 to US\$54.3 between 2016 and 2021. Also, the fixed Internet ARPS is expected to decline from US\$103.2 to US\$99.4 between 2016 and 2021. The decline in the fixed voice ARPS is due to the decrease in the number of subscribers, change in the preference of consumers from voice to data.

Saudi Arabian government plans to boost broadband connectivity

It was estimated that 69.0% of Saudi Arabia's population was using the Internet in 2016. This is expected to increase to 77.0% by the end of 2021 as digital literacy levels rise in the kingdom. Additionally, the broadband penetration rate in 2016 in Saudi Arabia stood at 11.0% but is expected to increase to 16.0% by 2021. This is attributed to the initiative of Ministry of Communications and Information Technology to provide broadband connectivity to all the regions of Saudi Arabia under the national transformation plan by stimulating investment for the development of the required infrastructure.

The telecommunication industry to get big cash investments

The National Transformation plan undertaken by the government to create a strong non-oil economy has given a lot of impetus to the sectors such as telecom. This includes investment in the upgradation of the existing infrastructure by both the Government and telecom operators. The telecom regulator of Saudi Arabia, Communications and Information Technology Commission (CITC) is expected to invest US\$1.45 billion towards communication equipment and upgradation.

## SCOPE

Risk/Reward Index - enables you to assess the risks and potential rewards of investing in the Saudi Arabian Telecommunications market in comparison with other Middle East and African countries.

Industry Snapshot and Industry View - Key Telecommunications Industry Statistics including fixed/mobile revenue, subscriptions, churn, market share, and ARPS are analyzed to reveal the key issues and trends driving market performance in the Saudi Arabian Telecommunications market.

Industry SWOT Analysis - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investment in the Saudi Arabian

Telecommunications market.

Industry Benchmarking - Benchmark how the Saudi Arabian telecommunications market is performing compared to regional and global markets in terms of fixed or mobile revenue, subscriptions, ARPS, penetration, and usage to gauge potential for growth or market entry.

Competitive Landscape - Analyze and compare the performance of the leading players in the Saudi Arabian Telecommunications market by business segment on metrics such as such as churn, ARPU, and subscriber and revenue growth.

## **REASONS TO BUY**

What was the CAGR of broadband penetration from the period 2012-2016, and what is it projected to be up to 2021?

How risky is it to invest in the Saudi Arabian telecommunications industry?

What trends are being witnessed within the Saudi Arabian Telecommunications industry?

What are the Saudi Arabian Telecommunications industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

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