

UAE Telecom - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The UAE Telecom Market size is estimated at USD 9.37 billion in 2024, and is expected to reach USD 10.93 billion by 2029, growing at a CAGR of 3.15% during the forecast period (2024-2029).

The UAE telecom market has undergone significant transformation over the past few years owing to various initiatives taken by the government to boost the country's internet infrastructure and broadband connection, data consumption from businesses and individuals, 5G deployments, and various innovations by major telecom market vendors operating in the United Arab Emirates.

Key Highlights

As per the World Bank, 100% of the country's population has access to the Internet. With a growing percentage of the population using smartphones, the enhanced service quality offered by operators, and technology and infrastructure upgrades, internet users are expected to increase further.

The increasing penetration of 5G and the advent of 6G are expected to drive the market's growth. For instance, the median download speed on 5G networks is among the fastest in the world, and the fixed broadband speed is among the highest. This is the outcome of recent infrastructure expenditures prioritizing fiber over updated copper networks and 5G.

In 2023, the United Arab Emirates implemented the 5G technology. Its execution in the country was expected to bring enhanced mobile broadband services and improved connectivity for the Internet of Things (IoT) and support new and innovative applications

and services.

The growing spending on communication is one of the major factors contributing to the market's growth. The market has primarily benefitted from the increasing smartphone penetration and high demand for telecom services from individuals and businesses over the past few years. The country has been accelerating its digital strategy adoption in various industries and prioritizing integrating all populations through high-quality internet services, which would create an opportunity for the mobile internet service providers in the country to expand their mobile connectivity services, including 2G, 3G, 4G, and 5G.

However, as the country is highly dependent on external sources to balance the skill deficit, it may face challenges in the coming years as dependency on foreign talent may lead to vulnerability if visa regulations change, restricting the availability of skilled labor. A predominantly foreign workforce may impact the representation of Emirati nationals within the sector, affecting the nation's participation in the telecom industry. In response to these challenges, the UAE telecom industry needs to strike a balance between leveraging the advantages of foreign talent and investing in the development of local expertise.

Post-COVID-19, the adaptation or changes in the communication behaviors of consumers are predicted to influence the future dynamics of the UAE telecom industry. Customers choosing digital services such as online ordering, mobile payments, and strong collaboration tools will be the new standard for telecom service providers post-crisis. Telcos should continue to invest in their network infrastructure to meet these future needs.

UAE Telecom Market Trends

Data and Messaging Services to Hold Major Share

Data and messaging services are witnessing a surge in demand in the United Arab Emirates due to the rising need for efficient and reliable internet services in businesses as the digitization trend is gaining momentum. In addition, growing 5G deployment, cost-effective bundled messaging and data packages from market vendors, a robust network infrastructure coupled with rising use cases of artificial intelligence, IoT, smart Home, metaverse, and UHD cloud gaming are driving the demand for data and messaging services growth of the segment.

Major market vendors are launching innovative broadband services to add new revenue

streams and elevate business and residential users' experience for high-speed internet connectivity within indoor environments, thus indicating demand for fixed networks. As per Statista and Digital 2024, internet users in the United Arab Emirates are expected to reach 9.46 million in 2024.

In June 2023, Nokia announced that Du, from Emirates Integrated Telecommunication Company, deployed Nokia's multi-access gateway (MAG) to provide broadband services to business and residential users over 4G/5G fixed-wireless access (FWA) in addition to mobile services. The telecom company is leveraging the Nokia FastMile 5G gateways, MAG, and Nokia professional services. Furthermore, as per the survey by ITU and OECD, the number of mobile broadband connections per 100 inhabitants in the country is estimated to increase by 16.4% by 2028.

Internet requirements are rising due to industries moving to cloud solutions and adoption of advanced technologies in business processes, and consumers are moving towards online shopping in the country, fueling both Fixed and mobile data services. In addition, the high number of internet users and social media users also augment the growth of the market.

Moreover, market vendors are introducing innovative and flexible data and messaging packages, attracting consumers to use their services. For instance, Etisalat's Wasel Flexi plans allow customers to make their own plans according to their mobile needs. For small and medium-sized businesses, the company also offers Data Only Plans that are agile and rich in benefits, offering supersonic data with a selection between 500MB to 100GB, from only AED 29/month. Further, Du offers data-only SIM for postpaid customers and Flexi plans for prepaid customers, which deliver Double Data for six months on 4 GB plus plans.

Overall, the demand for data and messaging services is expected to grow at a significant rate in the coming years, largely supported by growing Internet and social media penetration, adoption of advanced technologies among businesses, increasing need for reliable and high-speed connectivity, innovative services launches by market vendors, and cost-effective data and messaging package offered by telecom vendors.

Mobile Network to be the Fastest Growing Segment

The increasing use of devices per user, high rates of replacement, and users shifting

from traditional phones to smartphones with the drop in prices were the significant factors that contributed to the growth of the mobile network segment.

The introduction of 5G and the subsequent increase in mobile internet speed are expected to fuel further the growth of the mobile network segment in the country. The United Arab Emirates has a robust mobile market dominated by major players, including Etisalat and Du, which are primarily government-owned. Companies operating in these countries expand their business as the mobile network continuously evolves.

For instance, in February 2023, Du collaborated with Huawei to develop 5.5G (5G-Advanced) technology to provide significantly faster data speeds, lower latency, and increased energy efficiency. It has also selected Nokia to upgrade its existing 5G network, with the vendor providing services such as equipment replacement and automated transport slicing. Etisalat launched its commercial 5G standalone network in late February 2023.

The growing mobile network in the country has elevated the demand for data and messaging services. Implementing 5G technology has amplified internet speeds and facilitated smoother and more efficient data transmission. This has led to a surge in data-hungry activities such as high-definition video streaming, online gaming, and other bandwidth-intensive applications.

The United Arab Emirates has experienced a steady and significant increase in telecom subscribers over recent years. The aggressive rollout and adoption of 5G technology by major telecom operators have attracted consumers seeking faster and more reliable connectivity. This push toward cutting-edge technology has encouraged more subscriptions. Additionally, the country ranks second in the survey by Speedtest, with an average mobile internet speed of 296 Mbps. Such technological advancements introduced by the regional mobile telecom vendors fuel the demand for mobile telecom services.

UAE Telecom Industry Overview

The UAE telecom market is consolidated, with fundamental players such as Etisalat (Emirates Telecommunication Group Company PJSC), Al Yah Satellite Communications (Yahsat), Emirates Integrated Telecommunications Company (du), and OSN (Orbit Showtime Network) occupying the maximum market share. Individual

players are deploying the 5G network by partnering with various 5G infrastructure providers globally.

October 2023: Nedaa, a professional communication corporation, and Emirates Integrated Telecommunications Company (du) announced that they signed an MoU to explore and enhance collaboration in the telecommunication sector. This alliance planned to advance several crucial projects by deploying Du's Internet of Things (IoT) capabilities within its network, ensuring seamless national roaming connectivity across the United Arab Emirates.

April 2023: Etisalat by E& announced revamping its mobile plans with more data and other benefits than ever before at no extra cost to satisfy clients' changing needs in the dynamic business ecosystem. Business First Plus and Business Xtreme plan to provide consumers with higher data allotments to meet businesses' increasing demand for data services.

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