

Communications | هيئة تنظيم
Regulatory Authority | الاتصالات
State of Qatar | دولة قطر

TELECOMMUNICATIONS MARKET-QATAR

No. 4/2023

Based on data as of Q4 2023



Communications | هيئة تنظيم
Regulatory Authority | الاتصالات
State of Qatar | دولة قطر

CONTENTS

- INTRODUCTION, DISCLAIMER & SECTOR SNAPSHOT
- SECTOR STATISTICS
- FINANCIAL INFORMATION
- DEFINITIONS
- ABBREVIATIONS

INTRODUCTION & DISCLAIMER

The Telecommunications Market Report - Qatar is intended to provide regular information about the main telecom market indicators. The document presents a snapshot, sector statistics and financial information about market development.

Data is collected and elaborated by the CRA based on Service Providers' regulatory reporting. The CRA has no responsibility regarding the accuracy of data. All data is gathered, elaborated and displayed according to ITU definitions and a relevant list of definitions may be found in the annex. In some cases, Service Providers may present data in their financial statements according to different definitions. As a result, some figures reported in the charts may differ from Service Providers' financial statements. Totals may not add due to rounding.

This Report is not a binding legal document and does not contain legal, commercial, financial, technical or other advice.



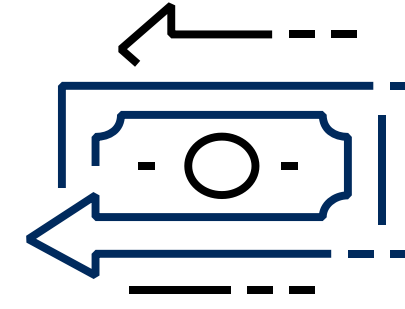
SECTOR SNAPSHOT

AS OF 31 DECEMBER 2023



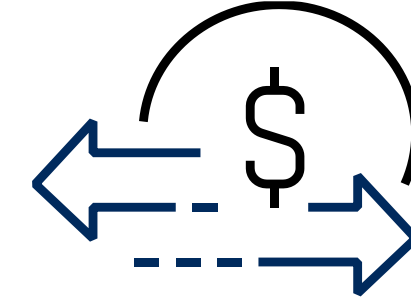
3.0 MILLION

Qatar Population
(Q4 2023)



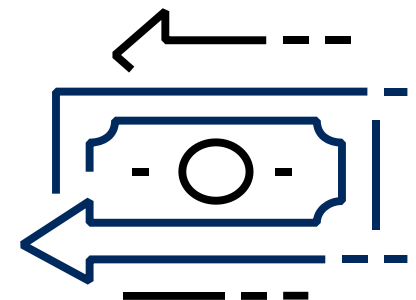
11.0 BILLION

Telecom Sector Revenue
(QAR 2023)



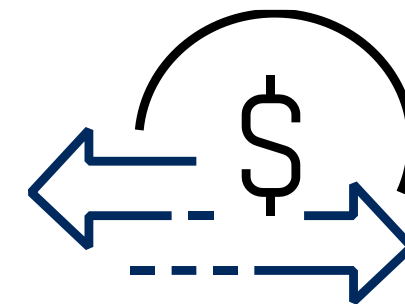
1.2 BILLION

Retail Telecom Sector
Investments (QAR 2023)



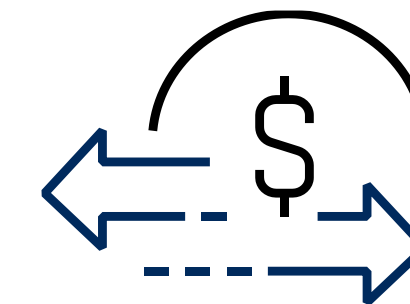
864 BILLION

GDP, current (QAR 2022)



237 BILLION

GDP, current (USD 2022)

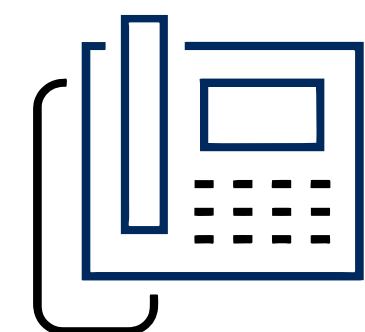


82 THOUSAND

GDP, per capita (USD 2022)

FIXED SNAPSHOT

Q4 2023



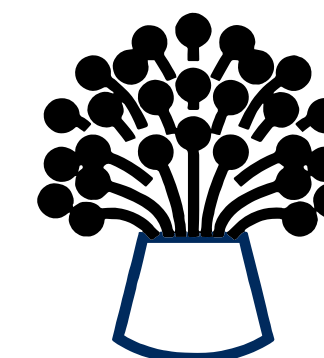
0.5 MILLION

Voice Subscriptions



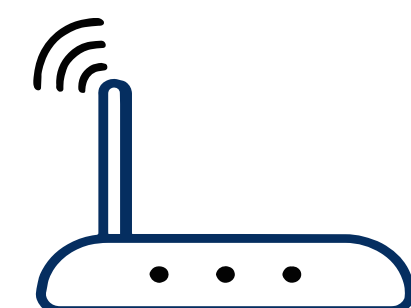
100 %

Fiber Population Coverage



86 %

Broadband Fiber subscriptions



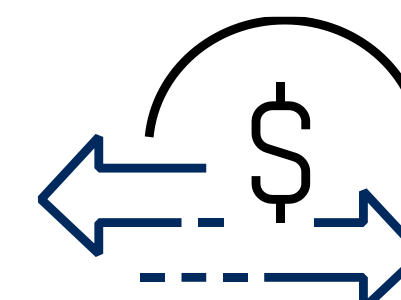
0.3 MILLION

Broadband Subscriptions



83 %

Subscriptions Above 100 Mbps



60 TH GLOBALLY

ITU Price Baskets 2023
Affordability Index
Fixed Broadband Basket

MOBILE SNAPSHOT

Q4 2023



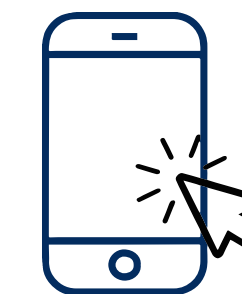
4.6 MILLION

Broadband
Subscriptions



15 GB

Data Per Subscription
Per Month



141 MINUTES

National Voice Per
Subscription Per Month



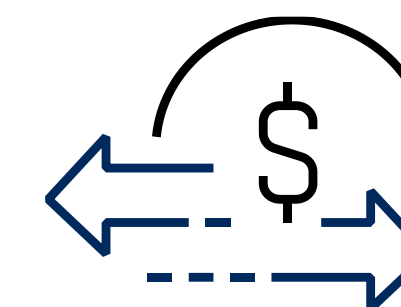
156 %

Broadband
Population Penetration



98.9 %

5G Population
Coverage



6 TH GLOBALLY

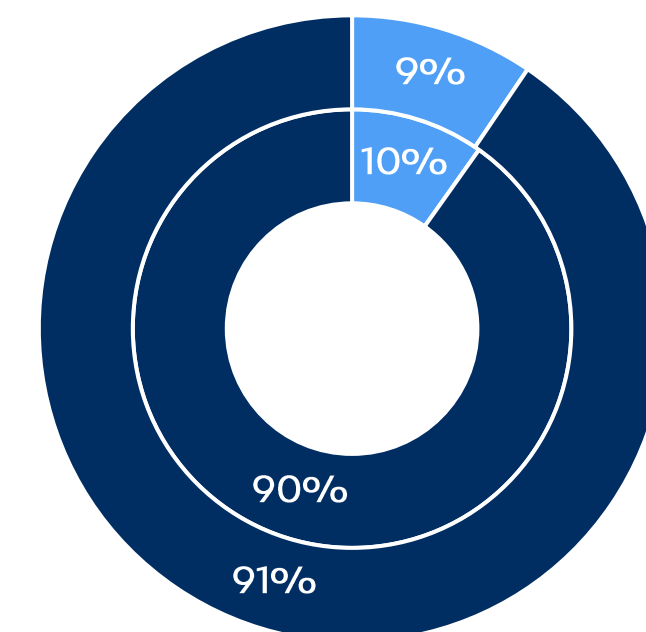
ITU Price Basket 2023
Affordability Index.
Mobile Data & Voice
High Consumption Basket

FIXED & MOBILE DATA UP- & DOWNLOAD

Fixed and Mobile data download is about 9 times higher than data upload.



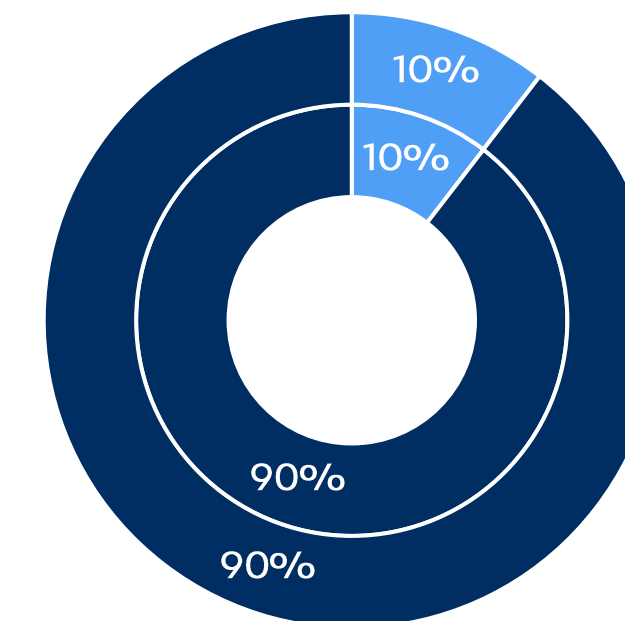
Fixed data up- & download



■ Upload ■ Download

Q4 2023: Outer circle
Q4 2022: Inner circle

Mobile data up- & download



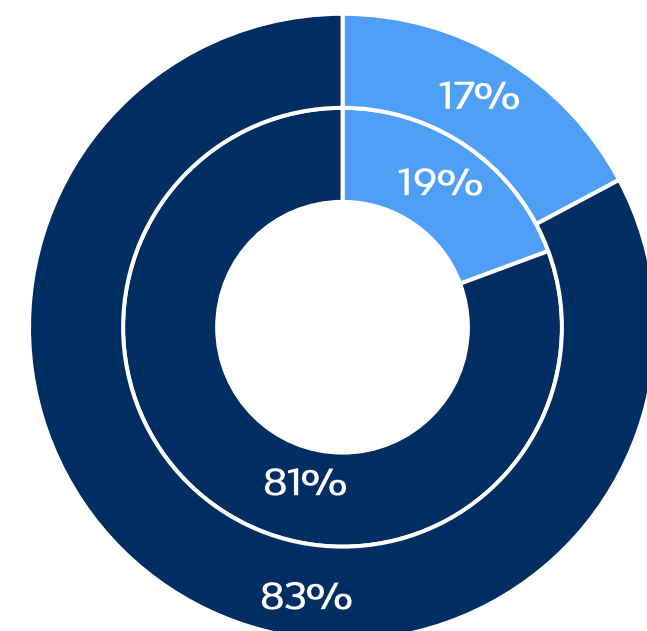
■ Upload ■ Download

Q4 2023: Outer circle
Q4 2022: Inner circle

FIXED & MOBILE DATA & MAIN REVENUE SOURCES

Fixed data traffic is about 4 times higher than mobile data traffic.
Revenue from data amounts to 2/3 of all telecom revenue.

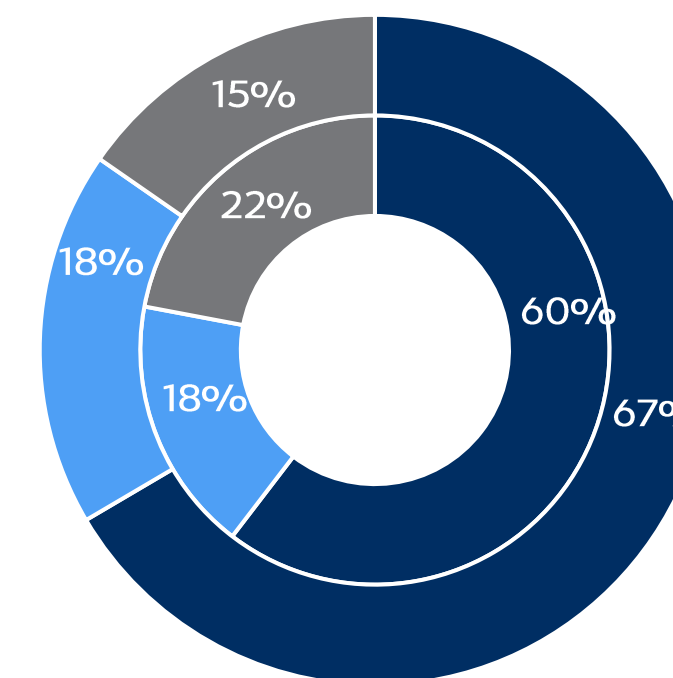
Mobile & Fixed data



■ Mobile data ■ Fixed data

Q4 2023: Outer circle
Q4 2022: Inner circle

Telecom revenue sources



■ Data ■ Voice ■ Other

Q4 2023: Outer circle
Q4 2022: Inner circle

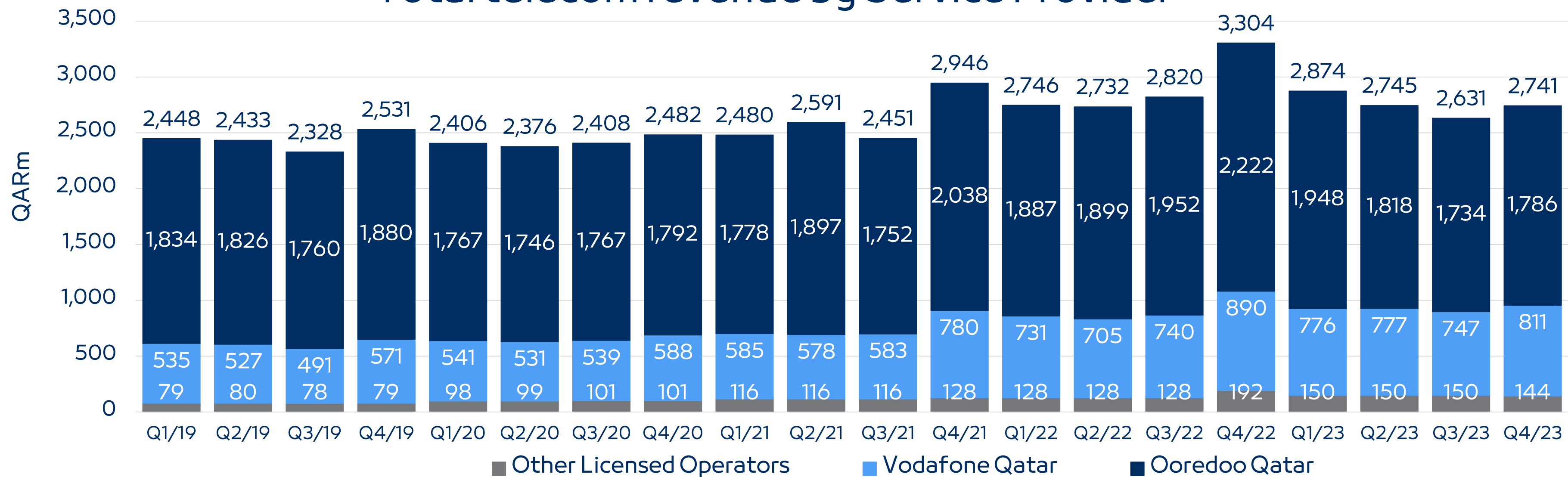
SECTOR STATISTICS

Key indicators

TOTAL SECTOR REVENUE BY SP

Total sector revenue has returned to the long-term trend of QAR 2.7 million.

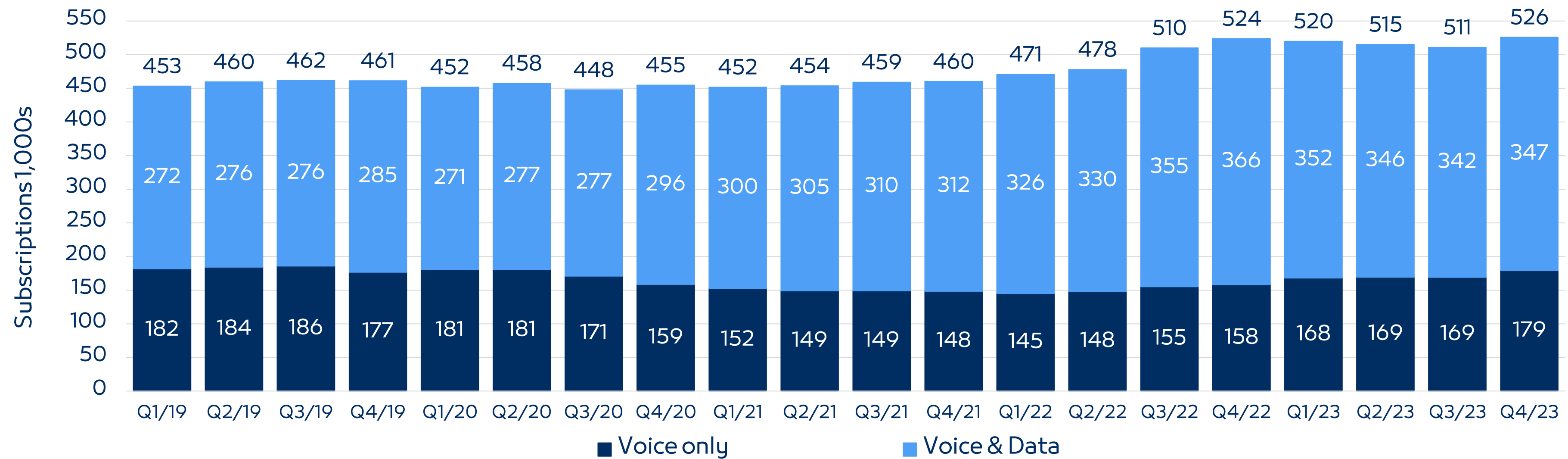
Total telecom revenue by Service Provider



FIXED VOICE & BROADBAND

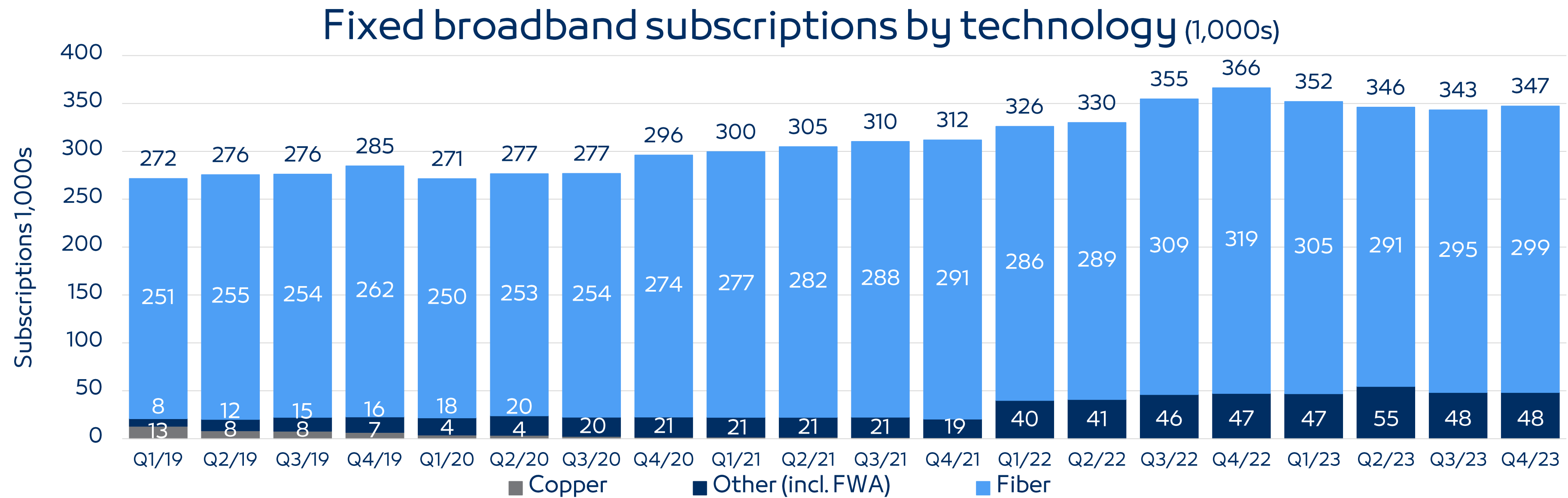
Fixed voice and broadband subscriptions have recently stabilized above 0.5 million subscriptions.

Fixed voice and broadband subscriptions (1,000s)



FIXED BROADBAND BY TECHNOLOGY

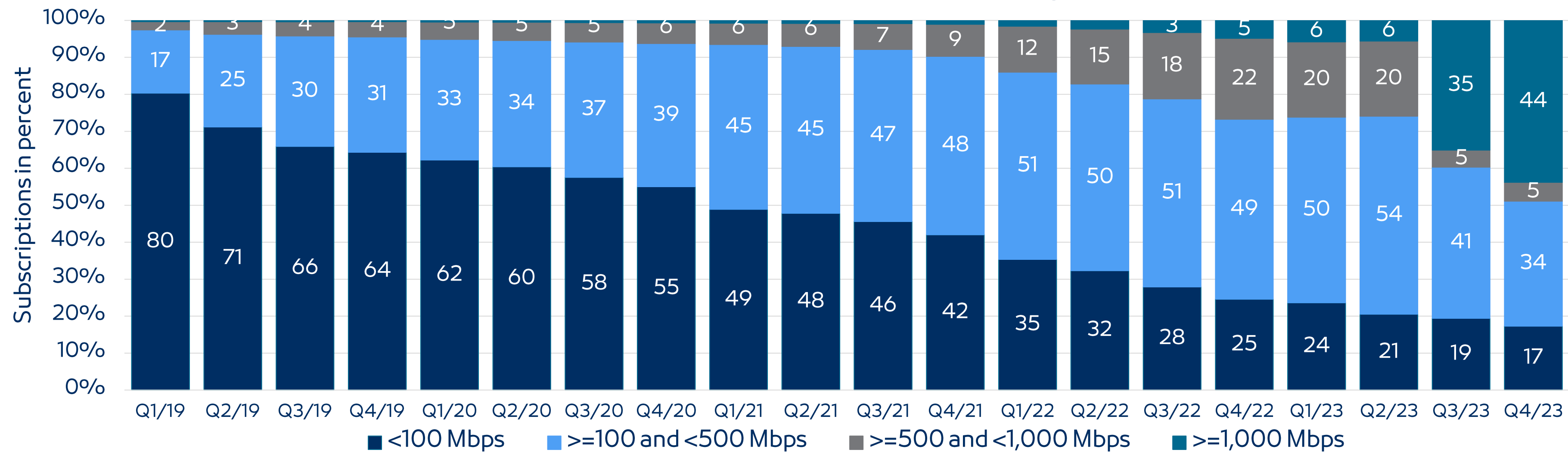
Fiber is by far the most prevalent fixed technology in Qatar.
The increase in other technology is mainly related to FWA subscriptions.



FIXED BROADBAND BY SPEED

For Q4 2023, 83% of fixed subscriptions are for 100 Mbps or more. Both SPs have recently upgraded many plans to 1 Gbps.

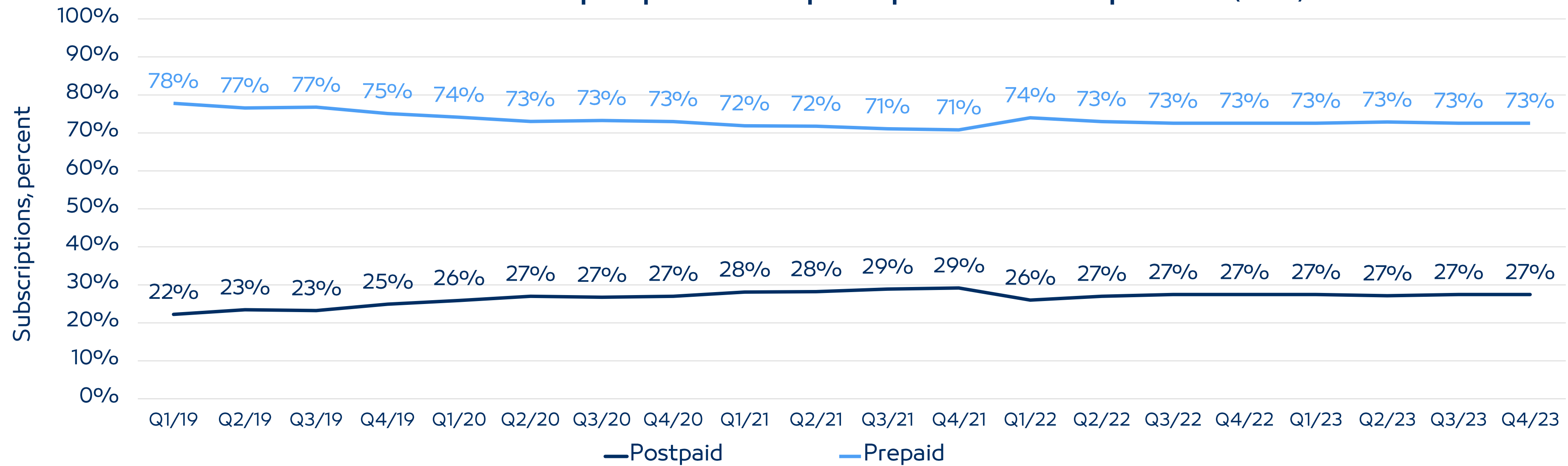
Fixed broadband subscriptions by speed (in %)



ACTIVE MOBILE TELEPHONE SUBSCRIPTIONS PER TYPE OF CONTRACT

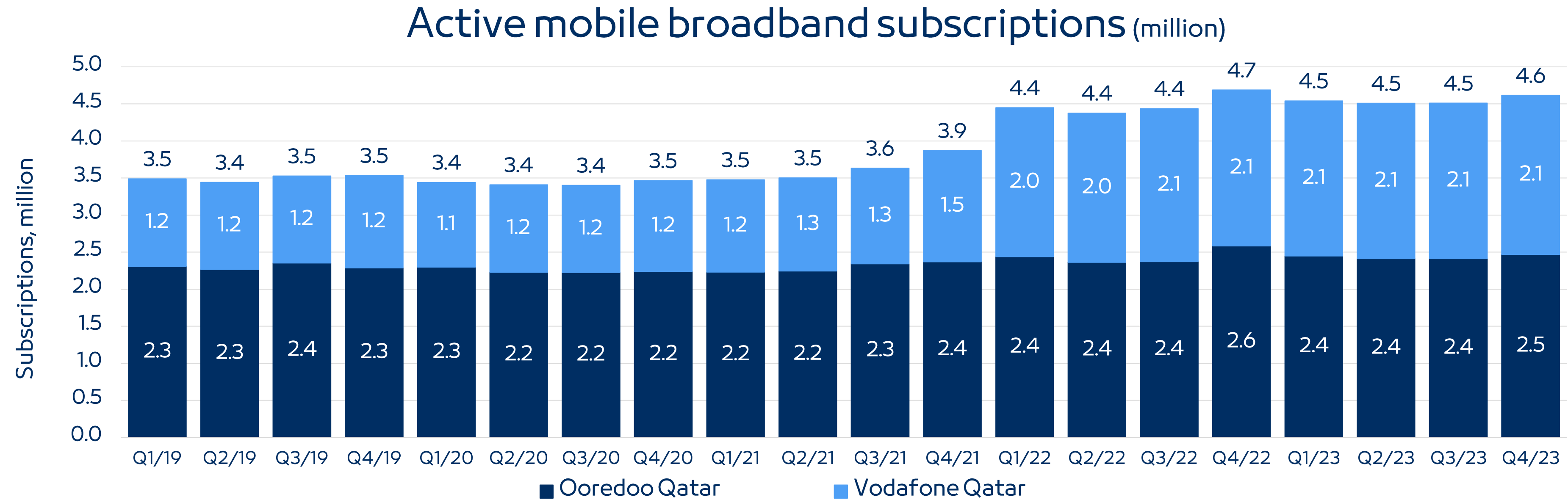
Postpaid mobile subscriptions have recently stabilized at 27%

Active mobile prepaid and postpaid subscriptions (in %)



ACTIVE MOBILE BROADBAND SUBSCRIPTIONS

The number of mobile broadband subscriptions has been quite stable around 4.6 million since Q1 2022.

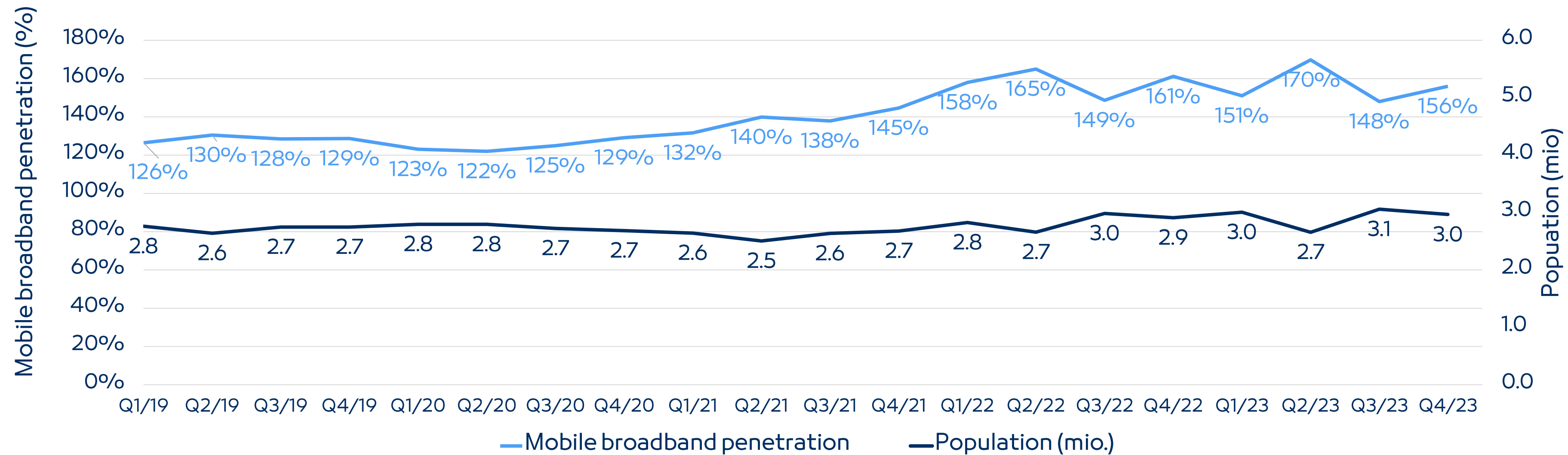


MOBILE PENETRATION & POPULATION

Mobile broadband penetration has reached a level around 150%.



Mobile broadband penetration & population

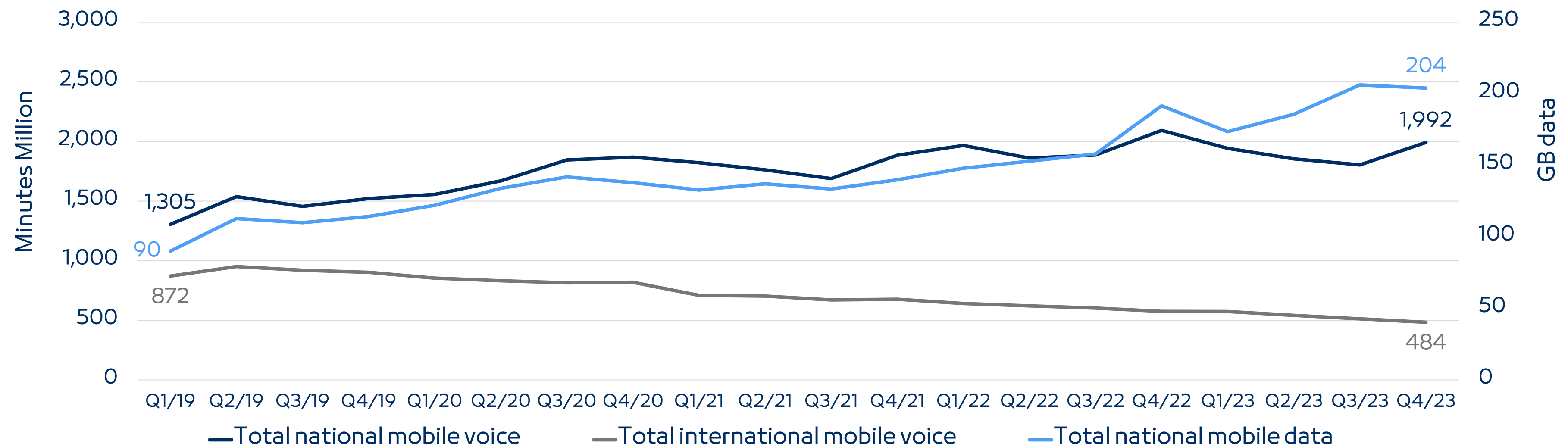


NATIONAL & INTERNATIONAL MOBILE TRAFFIC

National mobile voice has broadly stabilized while international mobile voice is consistently decreasing. National mobile data is on the rise.



Mobile, total voice and data, per quarter

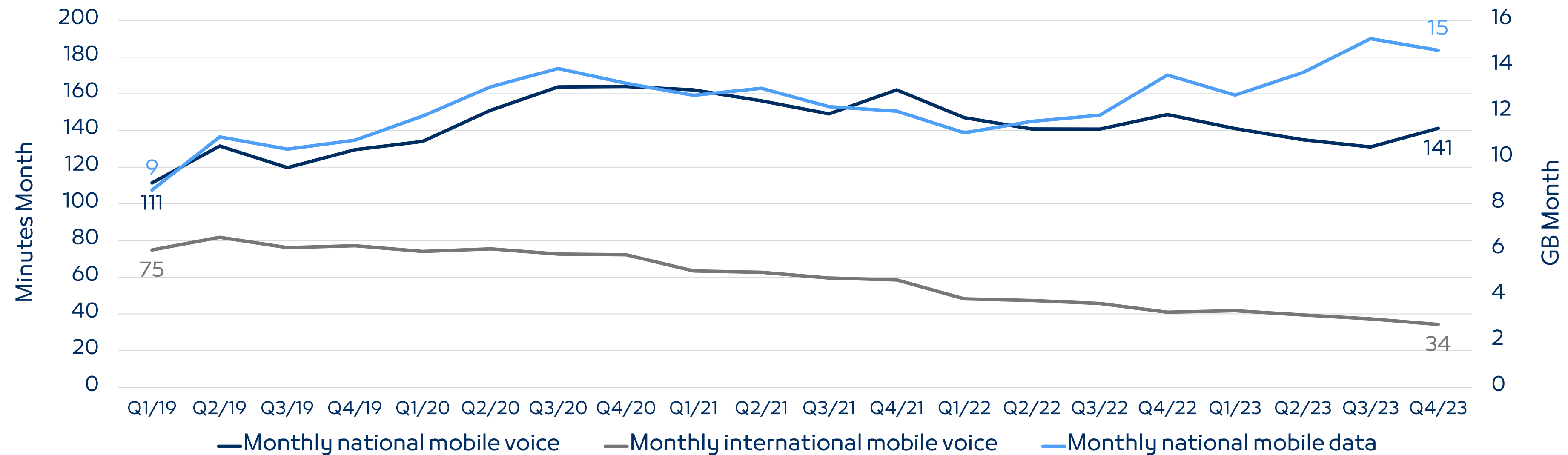


NATIONAL & INTERNATIONAL MOBILE TRAFFIC PER SUBSCRIPTION



National and international mobile traffic per subscription has returned to the normal trend.

Mobile, voice and data, per subscriber, per month



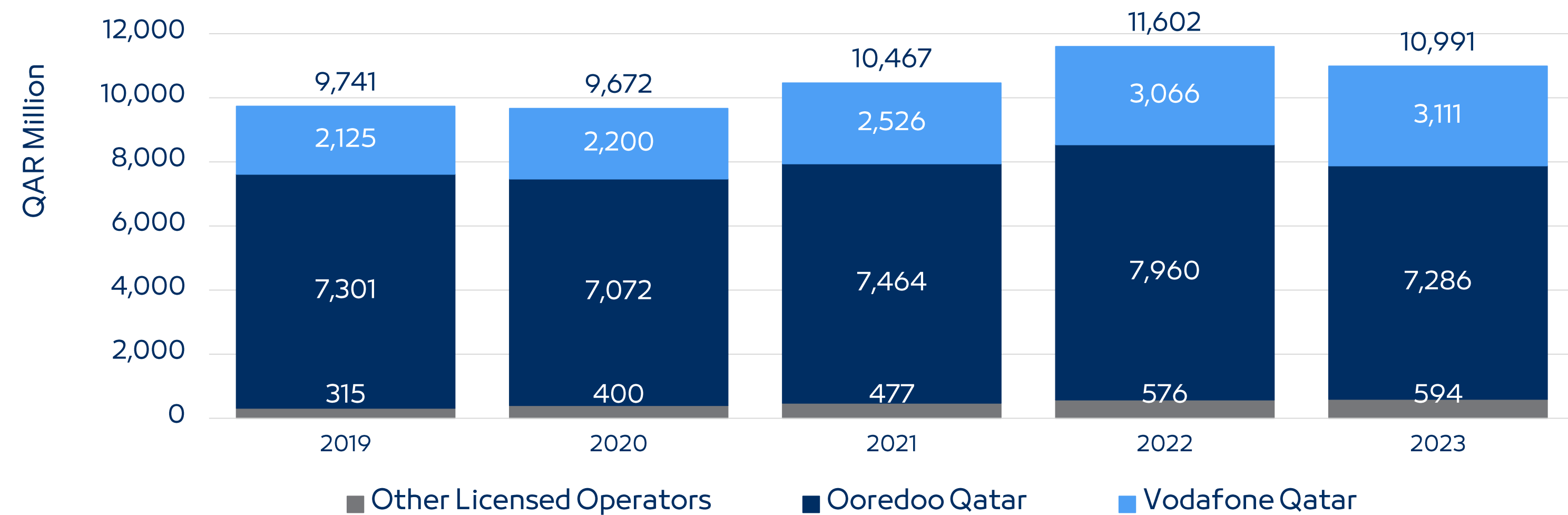
FINANCIAL INFORMATION

Key indicators

TELECOM SECTOR: REVENUE FULL YEAR

Telecom sector revenue reached QAR 11 Billion for 2023.
Ooredoo's decrease in revenue for 2023 is partly due a carve out of FinTech revenue.

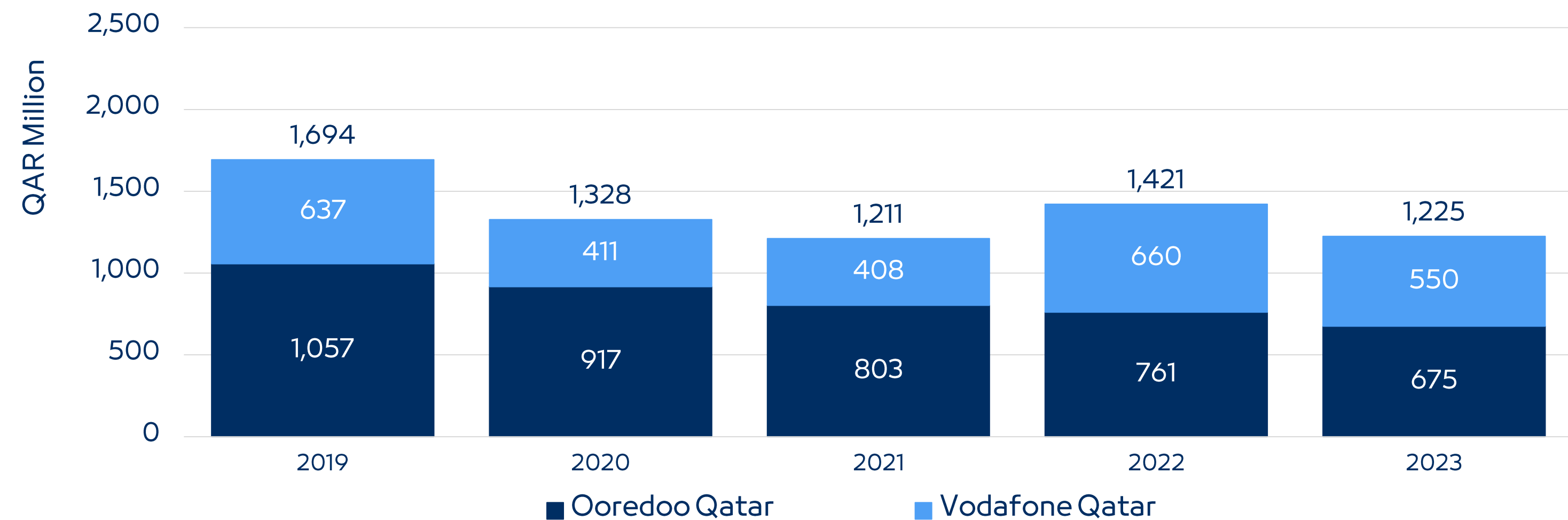
Telecom sector revenue (QAR Million)



TELECOM RETAIL SECTOR: CAPEX FULL YEAR

During the last 5 years, investments/capital expenditure (CAPEX) by the telecom retail sector have been higher than QAR 1 billion per year.

Telecom sector CAPEX (QAR Million)

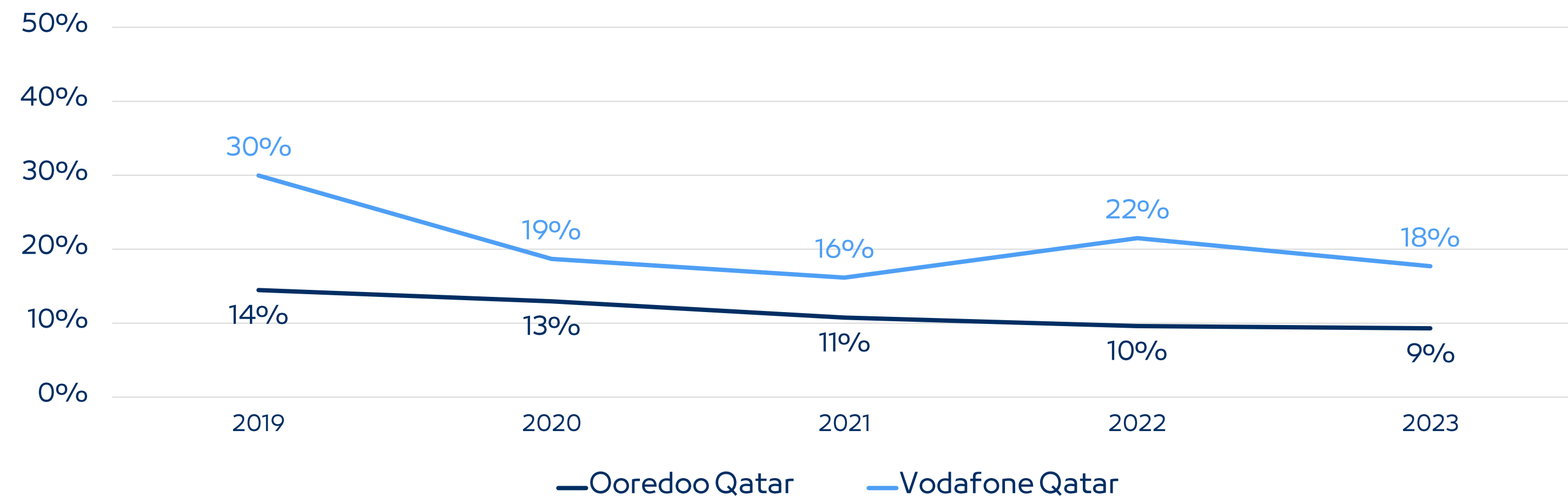


TELECOM RETAIL SECTOR: CAPEX INTENSITY FULL YEAR

Investments as a percentage of revenue is significantly higher for Vodafone Qatar than for Ooredoo Qatar. Ooredoo Qatar's investment intensity has been declining since 2019.



Telecom sector CAPEX (percent of revenue)





MOBILE SUBSCRIPTIONS ITU DEFINITIONS

i271 - Mobile-cellular telephone subscriptions

Mobile-cellular telephone subscriptions refers to the number of subscriptions to a public mobile-telephone service that provide access to the PSTN using cellular technology. The indicator includes (and is split into) the number of postpaid subscriptions, and the number of active prepaid accounts (i.e. that have been used during the last three months). The indicator applies to all mobile-cellular subscriptions that offer voice communications. It excludes subscriptions via data cards or USB modems, subscriptions to public mobile data services, private trunked mobile radio, telepoint, radio paging, M2M and telemetry services.



MOBILE SUBSCRIPTIONS ITU DEFINITIONS

i271mw - Active mobile-broadband subscriptions
=i271mb_active + i271md

Active mobile-broadband subscriptions refers to the sum of active handset-based and computer-based (USB/dongles) mobile-broadband subscriptions to the public Internet. It covers actual subscribers, not potential subscribers, even though the latter may have broadband-enabled handsets. Subscriptions must include a recurring subscription fee or pass a usage requirement – users must have accessed the Internet in the last three months. It includes subscriptions to mobile-broadband networks that provide download speeds of at least 256 kbit/s (e.g. WCDMA, HSPA, CDMA2000 1x EV-DO, WiMAX IEEE 802.16e and LTE), and excludes subscriptions that only have access to GPRS, EDGE and CDMA 1xRTT.



MOBILE SUBSCRIPTIONS ITU DEFINITIONS

i271mb_active - Data and voice mobile-broadband subscriptions

Data and voice mobile-broadband subscriptions refers to subscriptions to mobile-broadband services that allow access to the open Internet via HTTP and in which data services are contracted together with voice services (mobile voice and data plans) or as an add-on package to a voice plan. These are typically smartphone-based subscriptions with voice and data services used in the same terminal. Data and voice mobile-broadband subscriptions with specific recurring subscription fees for Internet access are included regardless of actual use. Prepaid and pay-per-use data and voice mobile-broadband subscriptions should only be counted if they have been used to access the Internet in the last three months. M2M subscriptions should be excluded. The indicator includes subscriptions to mobile networks that provide download speeds of at least 256 kbit/s (e.g. WCDMA, HSPA, CDMA2000 1x EV-DO, WiMAX IEEE 802.16e and LTE), and excludes lower-speed technologies such as GPRS, EDGE and CDMA 1xRTT.



MOBILE SUBSCRIPTIONS ITU DEFINITIONS

i271md - Data-only mobile-broadband subscriptions

Data-only mobile-broadband subscriptions refers to subscriptions to mobile broadband services that allow access to the open Internet via HTTP and that do not include voice services, i.e. subscriptions that offer mobile broadband as a standalone service, such as mobile-broadband subscriptions for datacards, USB modem/dongle and tablets. Data-only mobile-broadband subscriptions with recurring subscription fees are included regardless of actual use. Prepaid and pay-per-use data-only mobile-broadband subscriptions should only be counted if they have been used to access the Internet in the last three months. M2M subscriptions should be excluded. The indicator includes subscriptions to mobile networks that provide download speeds of at least 256 kbit/s (e.g. WCDMA, HSPA, CDMA2000 1x EV-DO, WiMAX IEEE 802.16e and LTE), and excludes lower-speed technologies such as GPRS, EDGE and CDMA 1xRTT. It excludes data subscriptions that are contracted together with mobile voice services.

ABBREVIATIONS

 **BB:** Broadband

 **CAPEX:** Capital Expenditure or investments

 **ITU:** The International Telecommunication Union, a United Nations specialized agency for Information & Communication Technologies (ICT)

 **MBB:** Mobile broadband

 **PSA:** Planning and Statistics Authority of Qatar

 **SP:** Service Provider

