

Communications Regulatory Authority
State of Qatar

هيئة تنظيم الاتصالات
دولة قطر

TELECOMMUNICATIONS MARKET-QATAR

No. 4/2022

Regulation & Competition Affairs - Market Data Study section

Based on data as of Q4 2022

+5.74

-58.93

-0.00

+4.58

201.55

097.95

+9.42

0.00

26,717.43

7,534.44

198.45

CONTENT

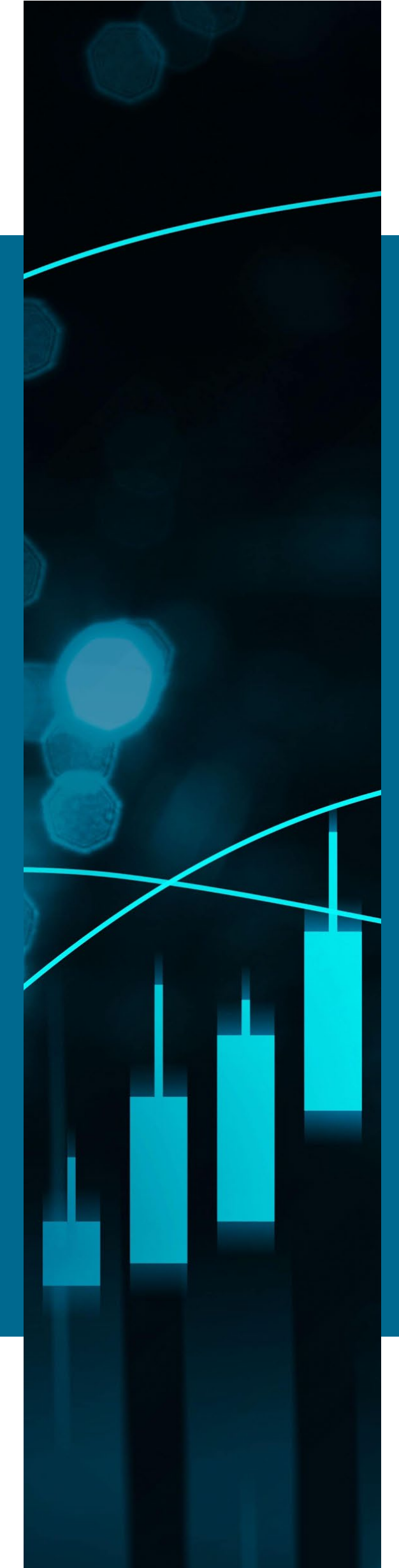
- INTRODUCTION, DISCLAIMER & SECTOR SNAPSHOT
- SECTOR STATISTICS
- FINANCIAL INFORMATION
- DEFINITIONS
- ABBREVIATIONS

INTRODUCTION & DISCLAIMER

The Telecommunications Report Qatar is intended to provide a regular monitoring system about the main telecom market indicators. The purpose of the document is to show trends, evolutions, as well as to provide guidance to interested stakeholders for further elaborations and analyses.

Data are collected and elaborated by CRA based on Service Providers' regulatory reporting. CRA has no responsibility regarding the accuracy of data. All data are gathered, elaborated and displayed according to ITU definitions; a relevant list of definitions may be found in the annex. In some cases, Service Providers may elaborate 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.

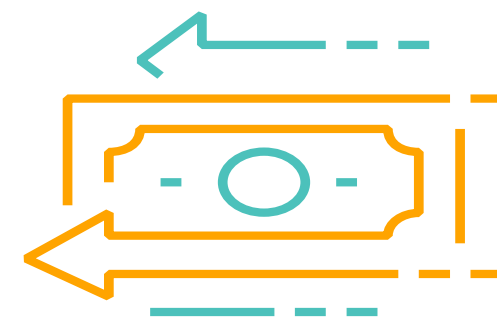
This Report is not a binding legal document and also does not contain legal, commercial, financial, technical or other advice.



SECTOR SNAPSHOT AS OF Q4 2022



2.9 MILLION
Qatar Population



11.6 BILLION
Telecom Sector Revenue
2022 (QAR)



1.4 BILLION
Retail Telecom Sector
Investments 2022 (QAR)

FIXED SNAPSHOT Q4 2022

VOICE & BROADBAND



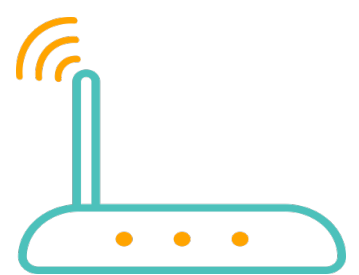
0.5 MILLION
Voice Subscriptions



99 %
Fiber Population
Coverage



87 %
Broadband Fiber
subscriptions



0.4 MILLION
Broadband Subscriptions

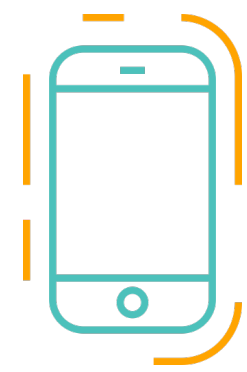


95 %
Subscriptions
Above 30 Mbps

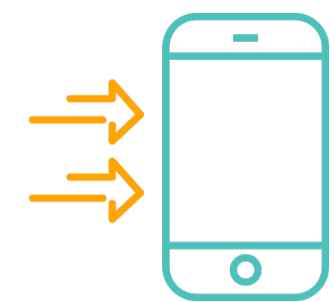
68 TH GLOBALLY
ITU Price Baskets 2021
Affordability Index Fixed
Broadband Basket

MOBILE SNAPSHOT Q4 2022

VOICE



4.7 MILLION
Subscriptions



161 %
Population Penetration



149 MINUTES
National Per Subscription Per Month

DATA



4.7 MILLION
Subscriptions



161 %
Population Penetration



13.6 GB
Per Subscription Per Month



98.3 %
5G Population Coverage



99.8 %
4G Population Coverage

10 TH GLOBALLY
ITU Price Basket 2021
Affordability Index
Mobile Data & Voice
High Consumption Basket

FIFA WORLD CUP QATAR 2022 OVERVIEW

The FIFA World Cup Qatar 2022 took place in November/December 2022. The CRA and the market players Ooredoo Qatar and Vodafone Qatar had a game plan for productive team work to cover the whole field and ensure that spectrum planning, telecom services and international broadcasting should perform at the highest level and the goal was achieved with excellence.

SPs prepared special service offerings of fan SIMs for visiting spectators based on the Hayya system, see below.

Stadiums **8** Matches **64** Spectators **3.4** MILLION

OOREDOO HAYYA SIM FOR VISITORS...

GET YOUR OOREDOO HAYYA SIM FREE

2022 MB
2022 MINUTES
2022 SMS

COMES WITH MULTILINGUAL COMMUNICATION...

FANS package
Roaming partnership

UNLIMITED DATA

Hayya Card holders can now enjoy a FREE FAN SIM*

FAN GIFTS

*Fan SIM: Benefits valid for 2 days. Terms & conditions apply. vodafone.qa/fans

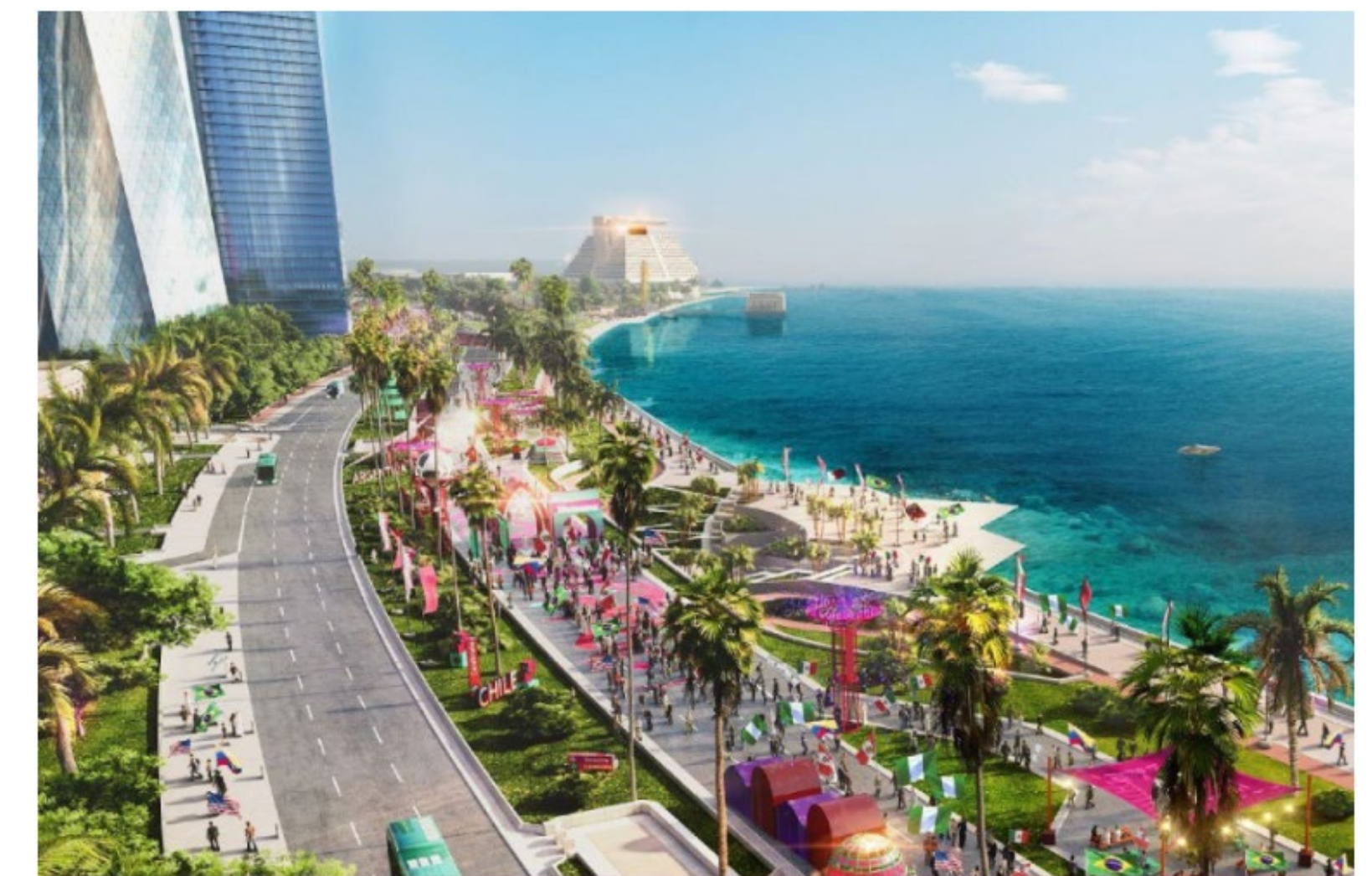
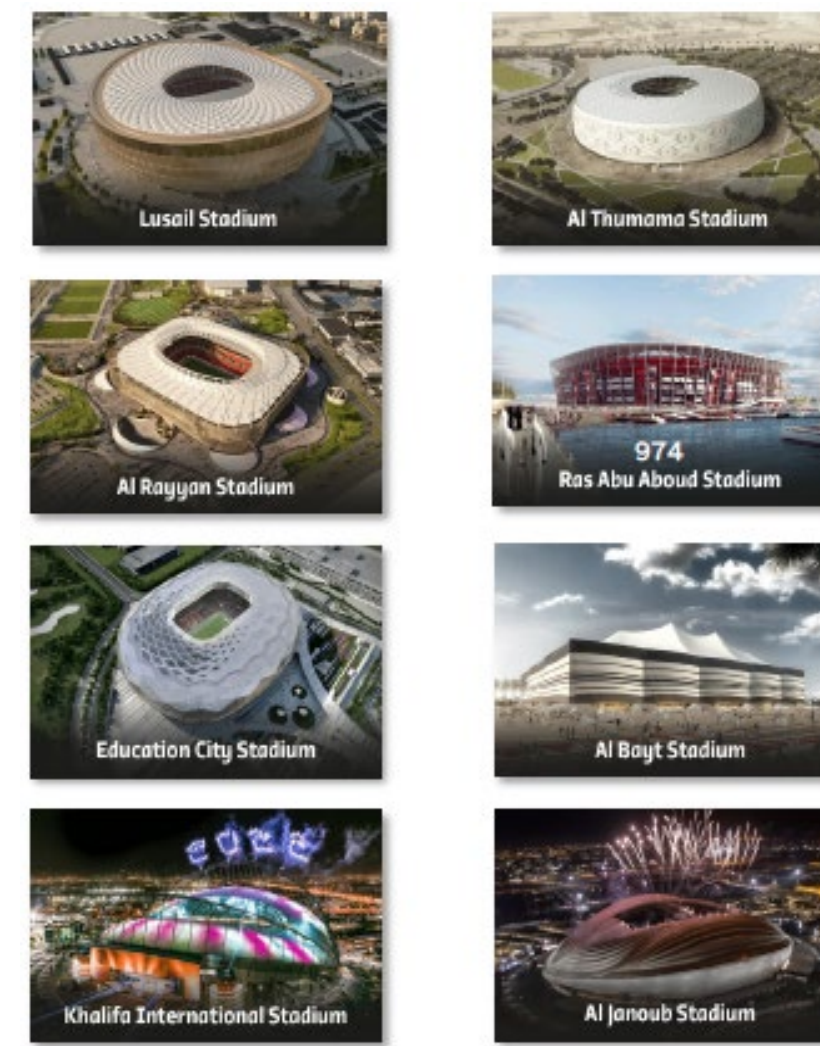


Image credit: Supreme Committee of Delivery and Legacy

FIFA WORLD CUP QATAR 2022 MAIN INDICATORS

	OOREDOO	VODAFONE	TOTAL
Telecom Revenue (QAR)	360 MILLION	134 MILLION	494 MILLION
Fan SIMs (No.)	0.3 MILLION	0.4 MILLION	0.7 MILLION
Mobile calls at Stadiums (No.)	11.4 MILLION	15.0 MILLION	26.4 MILLION
Mobile data at Stadiums (TB)	801 TB	1,187 TB	1,988 TB

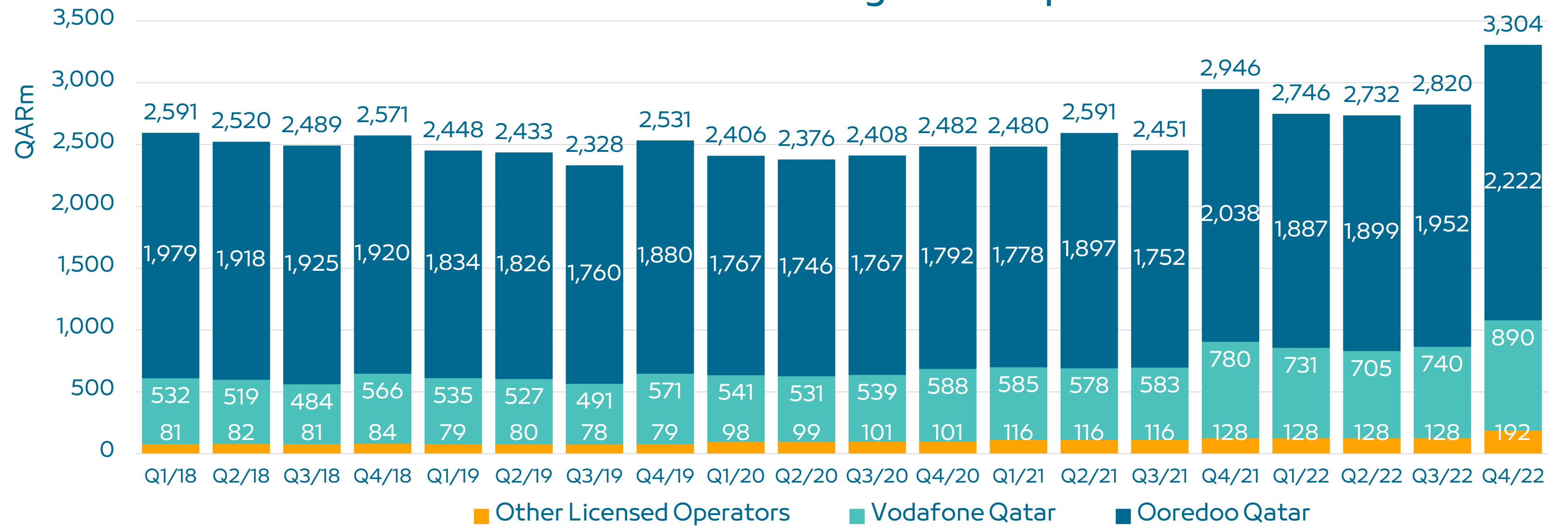
SECTOR STATISTICS

Key indicators

TOTAL SECTOR REVENUE BY SP

Total sector revenue peaked at QAR 3.3 billion for Q4 2022. The FIFA World Cup (FWC) Qatar 2022 contributed with a total revenue of QAR 0.5 billion for 2022.

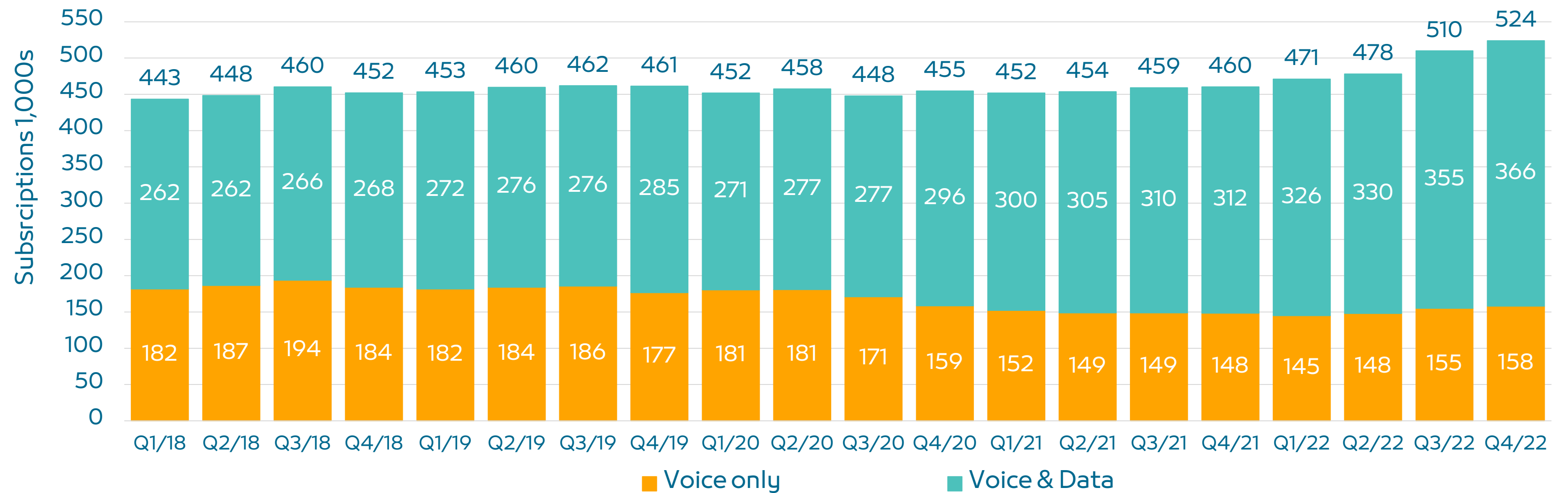
Total telecom revenue by service provider



FIXED VOICE AND BROADBAND

The total number of fixed subscriptions is in general quite stable.
Subscriptions for voice and data are increasing.
The increase in Q3 & Q4 2022 is mainly related to the FWC Qatar 2022 and will most likely be temporary.

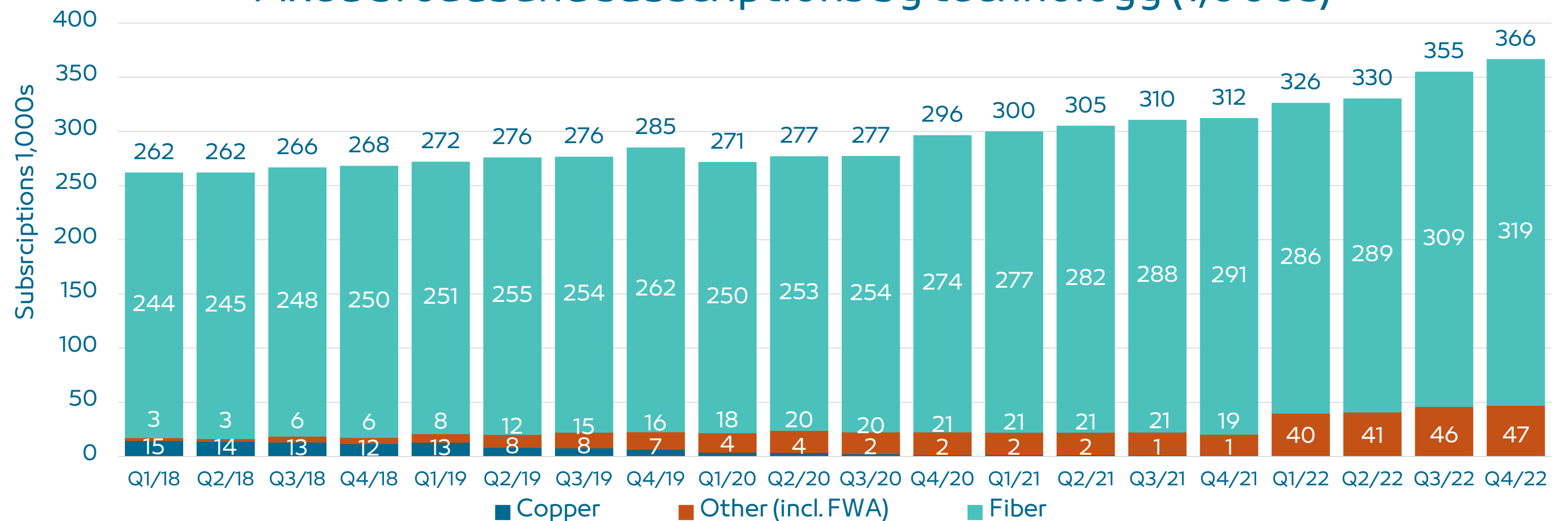
Fixed voice and broadband subscriptions (1,000s)



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.
The increase for Q3 & Q4 is mainly related to FWC Qatar 2022.

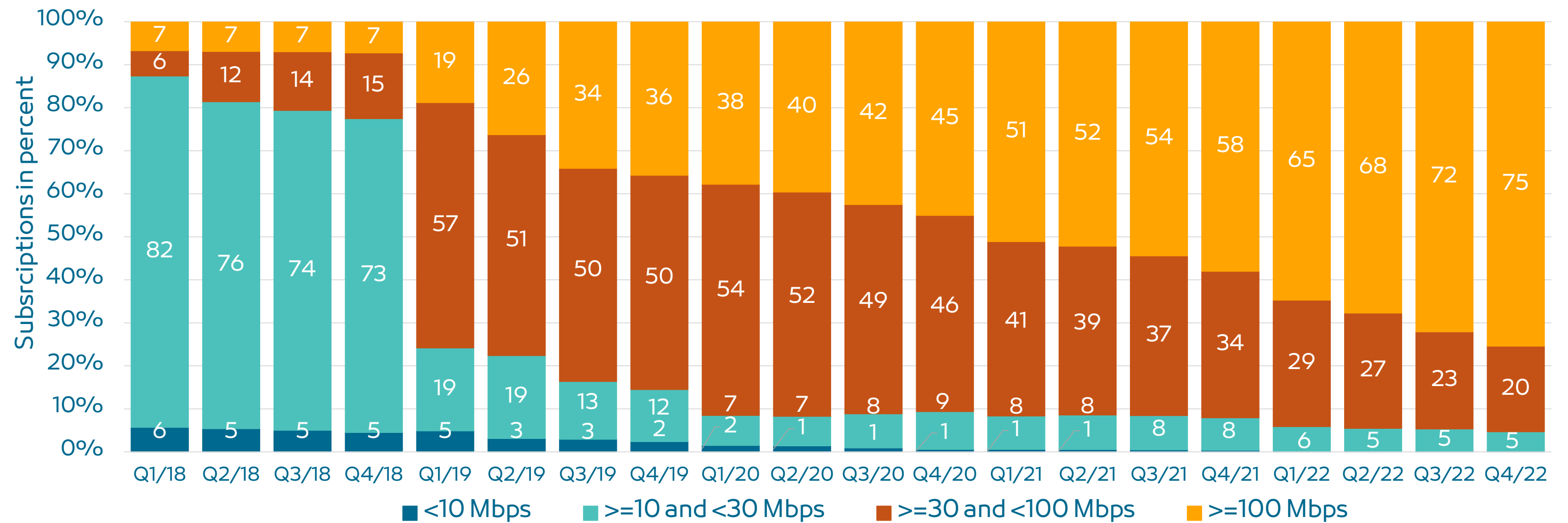
Fixed broadband subscriptions by technology (1,000s)



FIXED BROADBAND BY SPEED

75% of fixed subscriptions are for 100 Mbps or more. Speeds are continuously being upgraded.

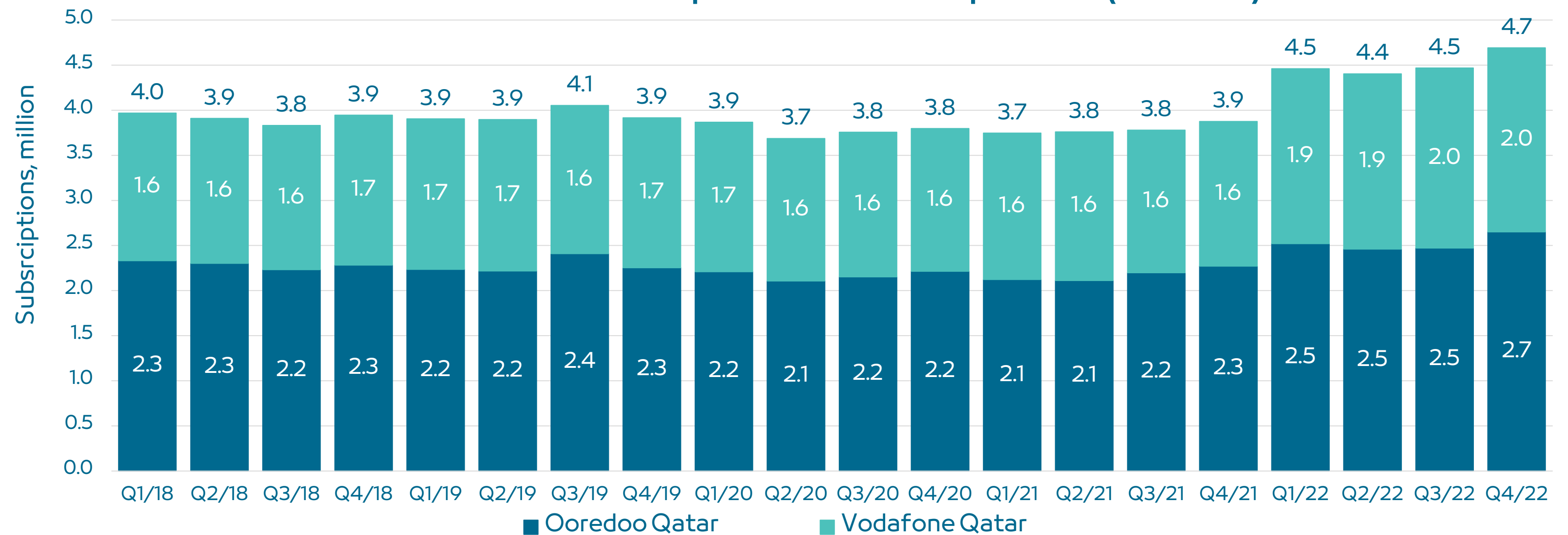
Fixed broadband subscriptions by speed (in %)



ACTIVE MOBILE TELEPHONE SUBSCRIPTIONS

The total number of mobile telephone subscriptions has increased in 2022 which is mainly due to the introduction of improved calculation methodology. The numbers are excluding fan SIMs (0.7 million).

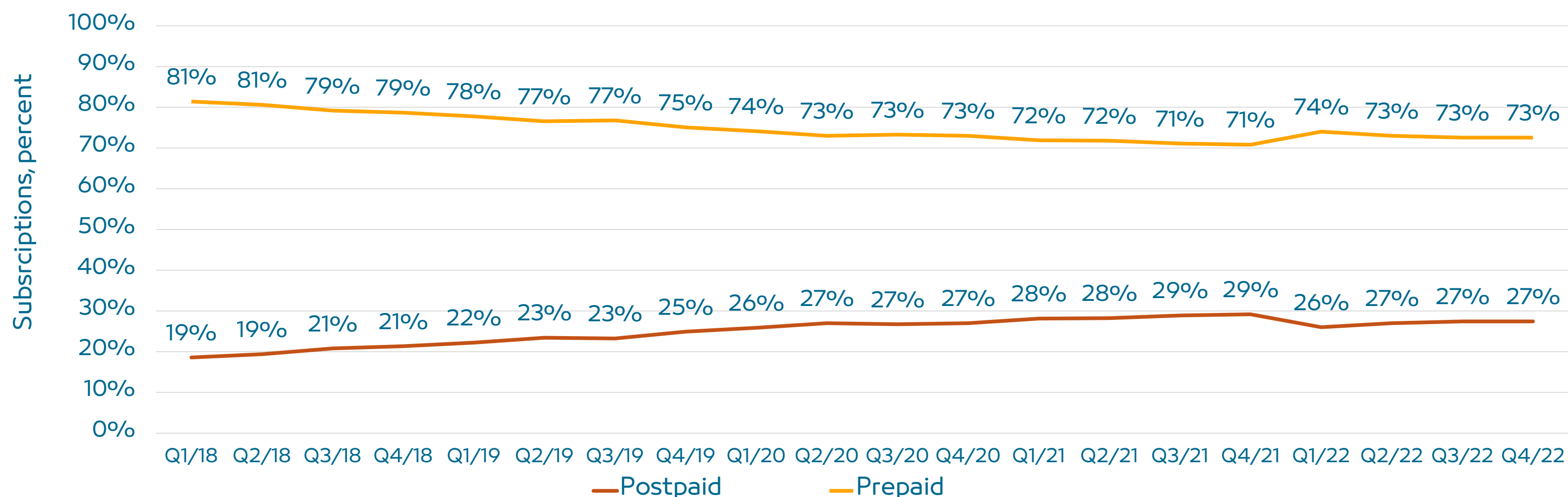
Active mobile telephone subscriptions (million)



ACTIVE MOBILE TELEPHONE SUBSCRIPTIONS PER TYPE OF CONTRACT

Postpaid mobile subscriptions are in general on an increasing trend.

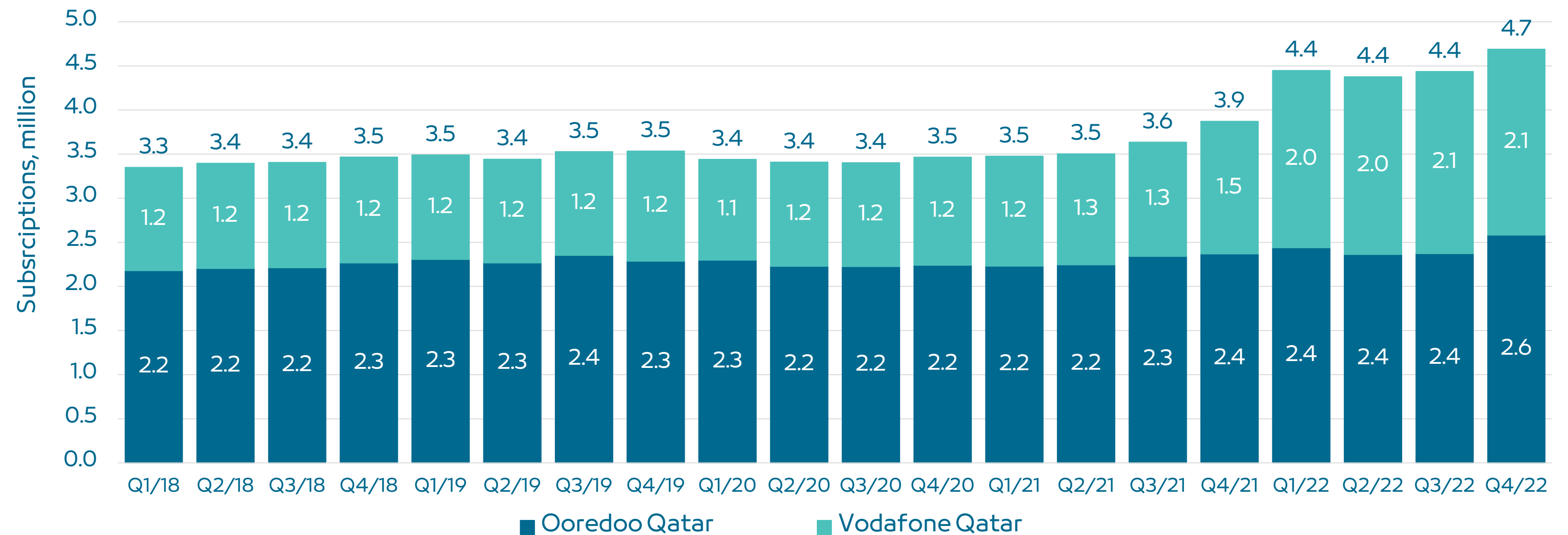
Active mobile prepaid and postpaid subscriptions



ACTIVE MOBILE BROADBAND SUBSCRIPTIONS

The number of mobile broadband subscriptions has increased recently due to migration from voice only and new calculation methodology. The numbers are excluding fan SIMs (0.7 million).

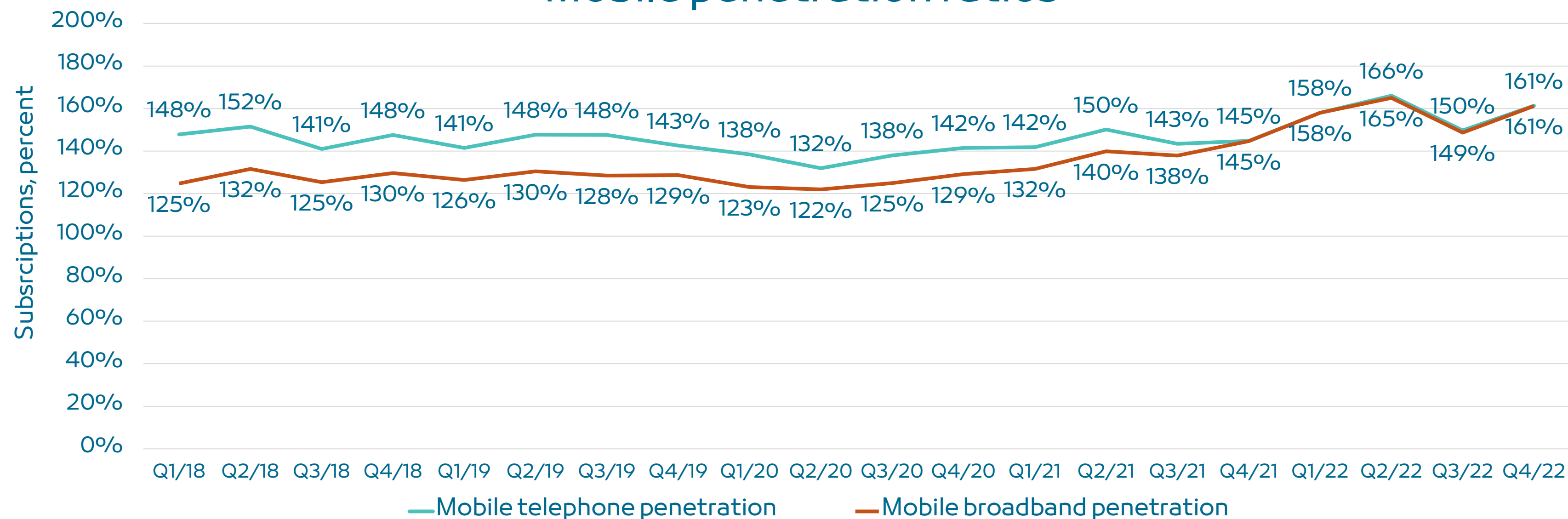
Active mobile broadband subscriptions (million)



MOBILE PENETRATION RATIOS

Mobile penetration ratios reached a new, higher level above 160% in 2022. The numbers are excluding fan SIMs.

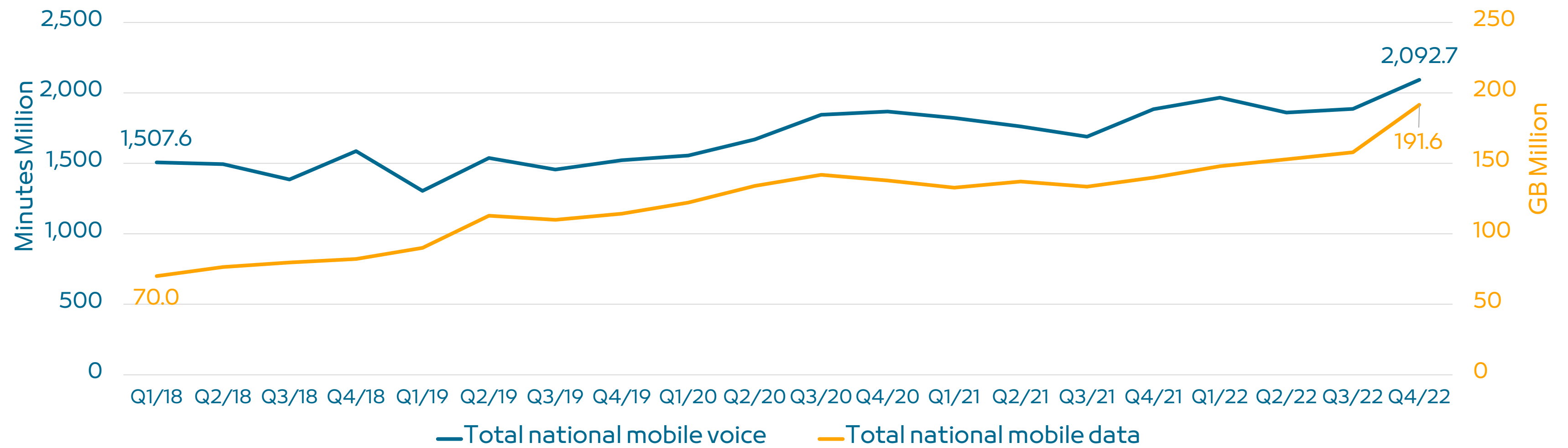
Mobile penetration ratios



NATIONAL MOBILE TRAFFIC PER SUBSCRIPTION

National mobile traffic is in general on an increasing trend. Numbers for Q4 2022 are including traffic for fan SIMs.

National mobile, total voice and data, per quarter (million)

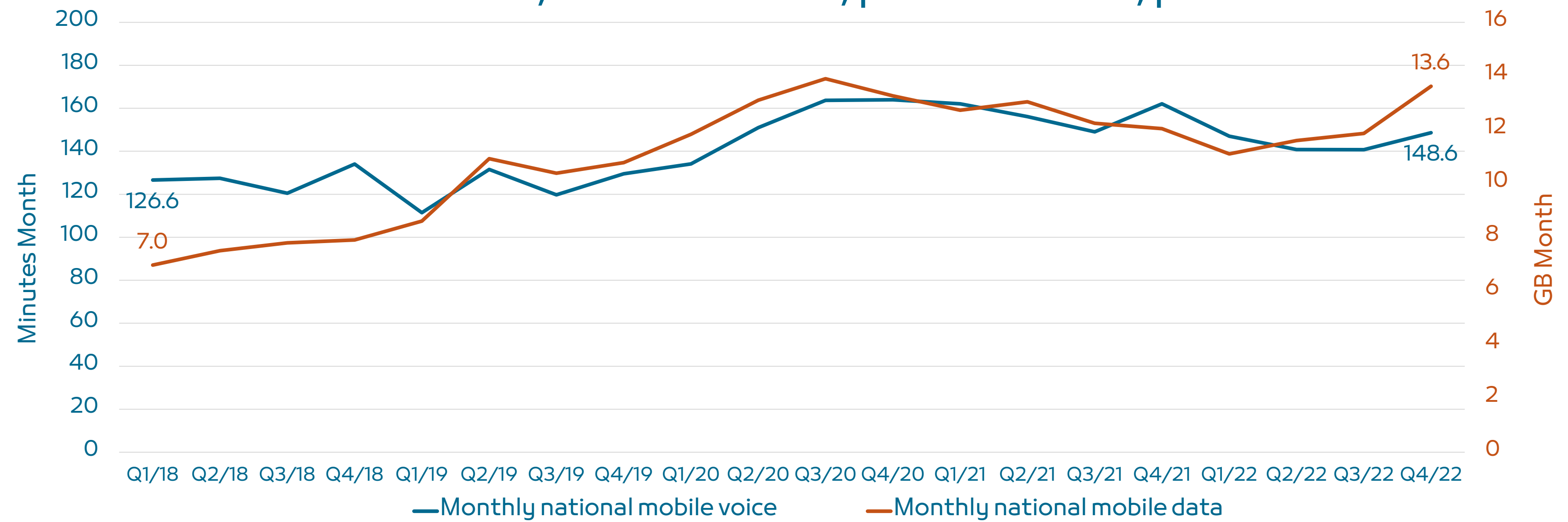


NATIONAL MOBILE TRAFFIC



National mobile traffic per subscriber increased in Q4 2022. Numbers for Q4 2022 are including traffic for fan SIMs.

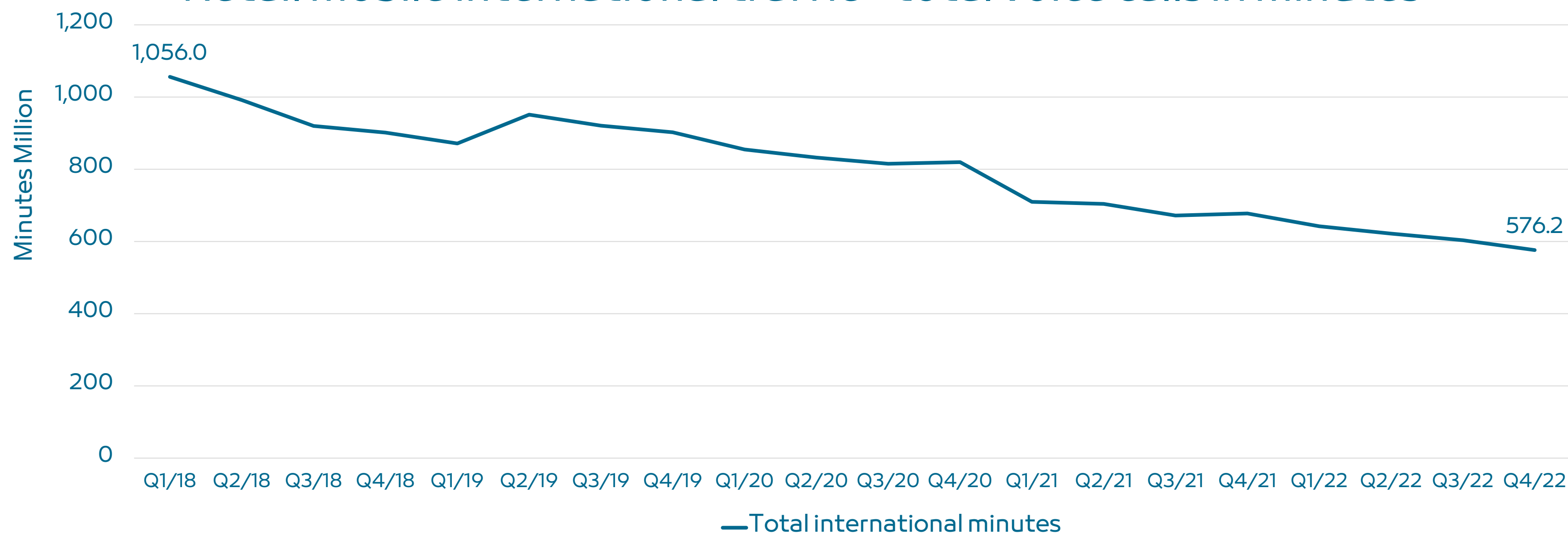
National mobile, voice and data, per subscriber, per month



INTERNATIONAL MOBILE VOICE TRAFFIC

Mobile international voice traffic has fallen by about half during the last 5 years.

Retail mobile international traffic - total voice calls in minutes



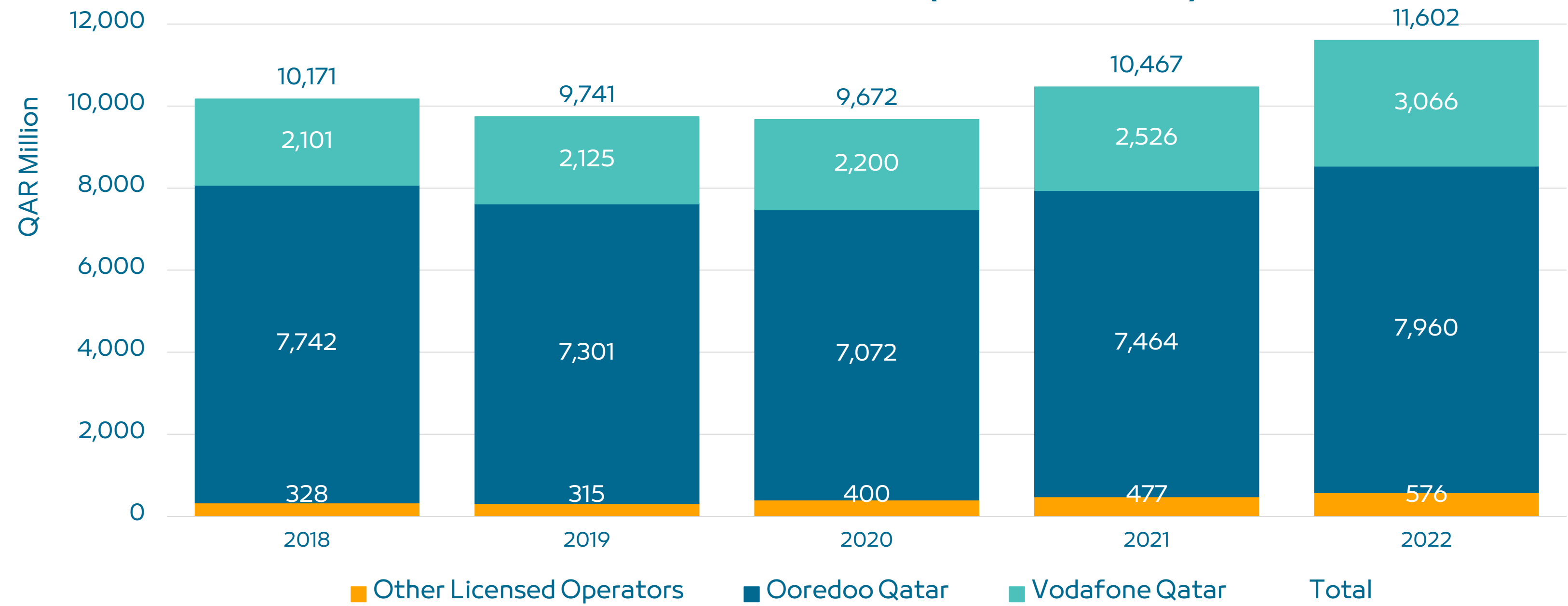
FINANCIAL INFORMATION

Key indicators

TELECOM SECTOR: REVENUE

Telecom sector revenue reached a new level above QAR 11 Billion for 2022.

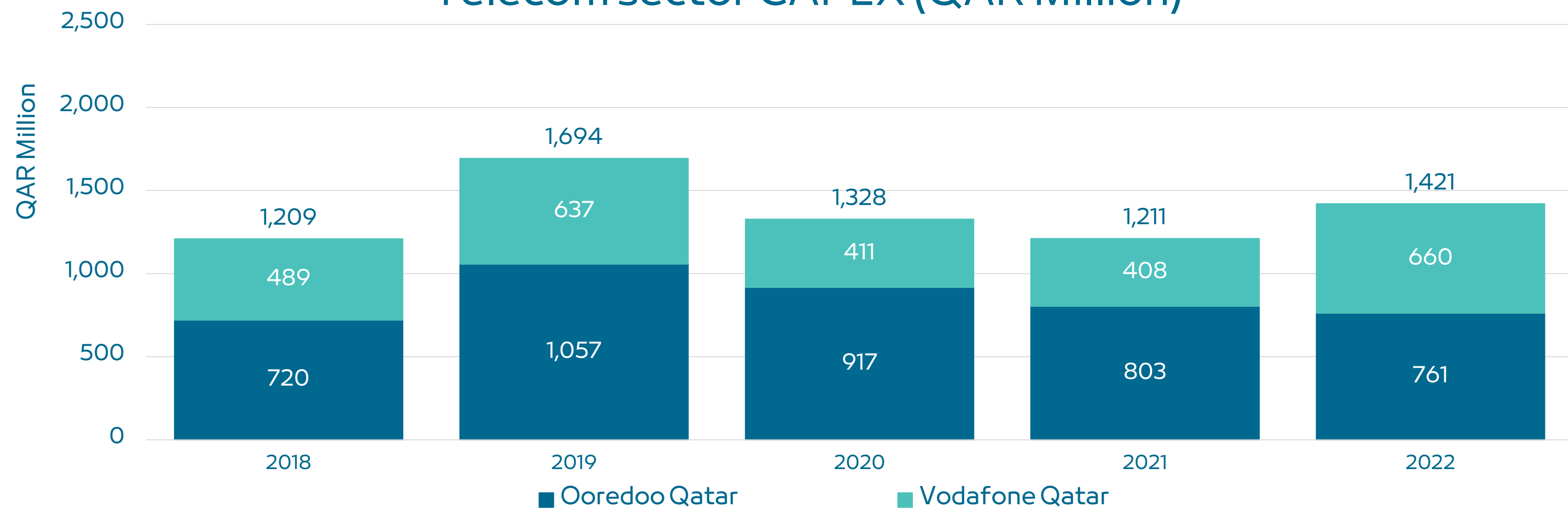
Telecom sector revenue (QAR Million)



TELECOM RETAIL SECTOR: CAPEX

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

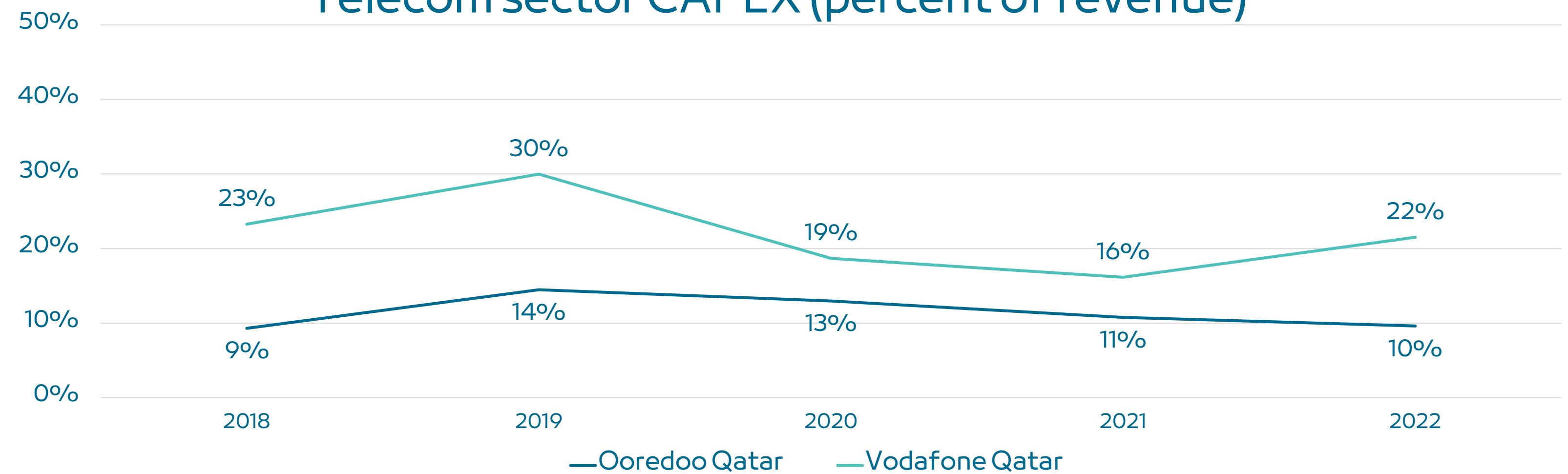
Telecom sector CAPEX (QAR Million)



TELECOM RETAIL SECTOR: CAPEX

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



