

TELECOMMUNICATIONS MARKET-QATAR

No. 4/2021

Regulation & Competition Affairs - Market Data Study section

Based on data as of Q4 2021

+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



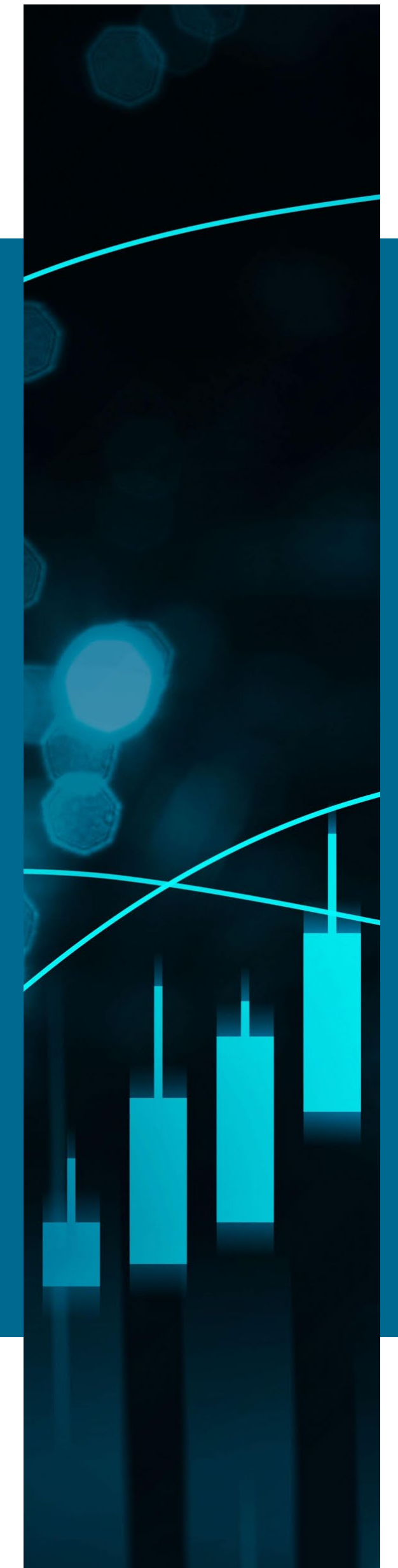
- INTRODUCTION, DISCLAIMER & SECTOR SNAPSHOT
- SECTOR STATISTICS
- FINANCIAL INFORMATION
- ABBREVIATIONS
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INTRODUCTION & DISCLAIMER

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.

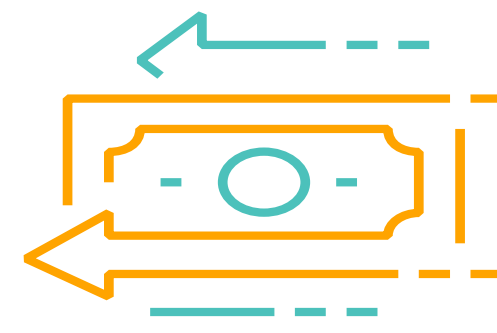
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SECTOR SNAPSHOT AS OF Q4 2021



2.7 MILLION
Qatar Population



10.5 BILLION
Telecom Sector Revenue
2021 (QAR)



1.2 BILLION
Retail Telecom Sector
Investments 2021 (QAR)

FIXED SNAPSHOT Q4 2021 VOICE & BROADBAND



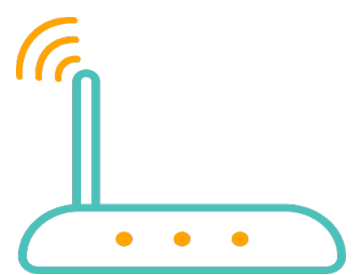
0.5 MILLION
Voice Subscriptions



99 %
Fiber Population
Coverage



93 %
Broadband Fiber
subscriptions



0.3 MILLION
Broadband Subscriptions

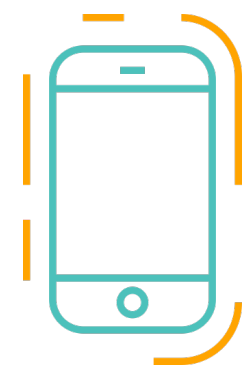


92 %
Subscriptions
Above 30 Mbps

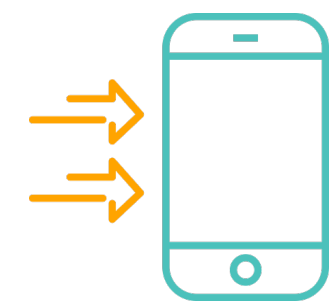
57 TH GLOBALLY
ITU Price Trends 2020
Affordability Index Fixed
Broadband Basket

MOBILE SNAPSHOT Q4 2021

VOICE



3.9 MILLION
Subscriptions



145 %
Population Penetration



162 MINUTES
National Per Subscription Per Month

DATA



3.9 MILLION
Subscriptions



145 %
Population Penetration



12.0 GB
Per Subscription Per Month



95.7 %
5G Population Coverage



99.8 %
4G Population Coverage

6 TH GLOBALLY
ITU Price Trends 2020
Affordability Index
Mobile Data & Voice
High Consumption Basket



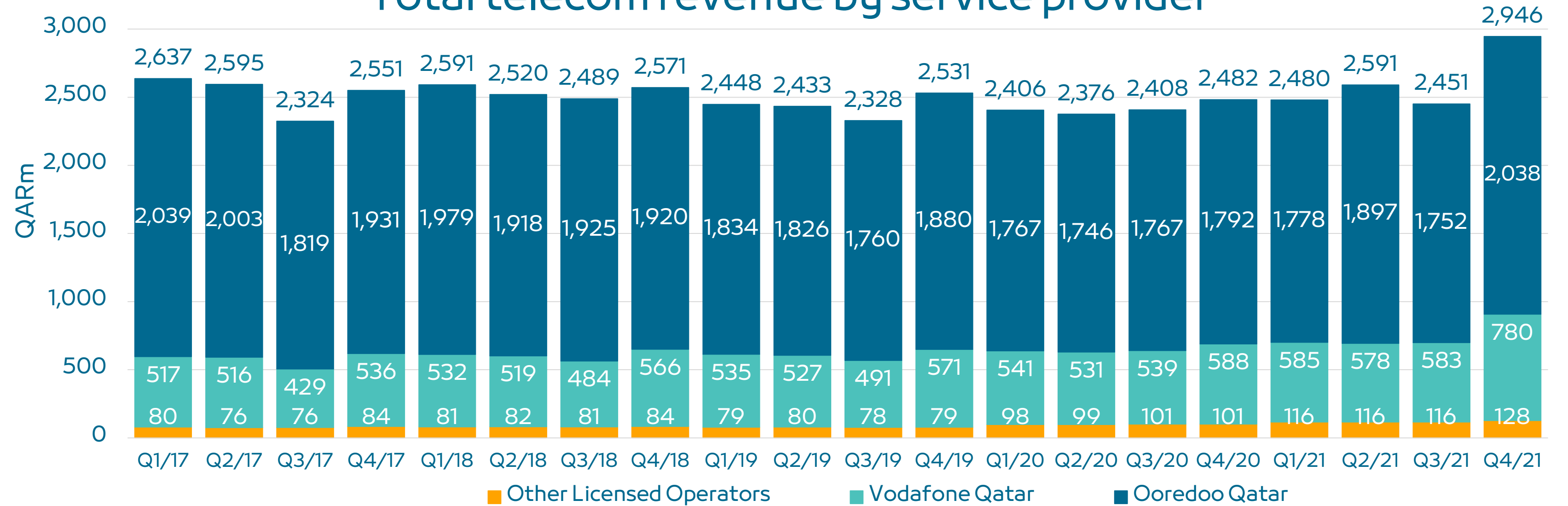
SECTOR STATISTICS

Key indicators

TOTAL SECTOR REVENUE BY SP

Total sector revenue has been in the region of QAR 2.5 billion per quarter.

Total telecom revenue by service provider

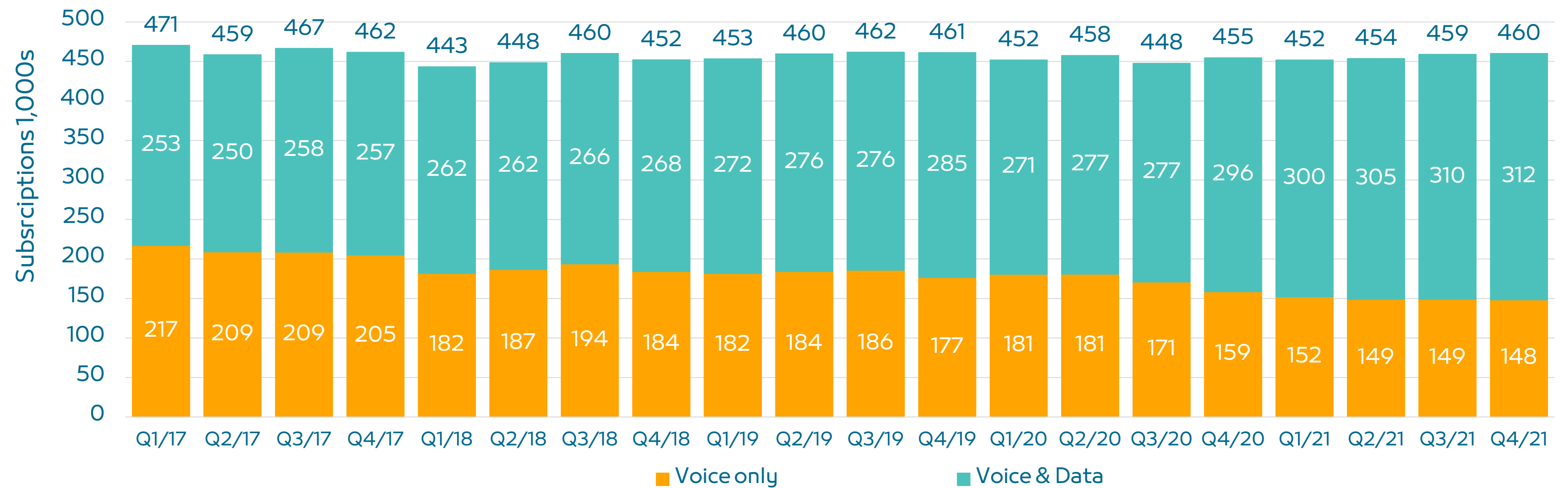


Revenue for Other Licensed Operators is to a certain extent based on forecasts

FIXED VOICE AND BROADBAND

The total number of fixed subscriptions is quite stable.
Subscriptions for voice and data are increasing.

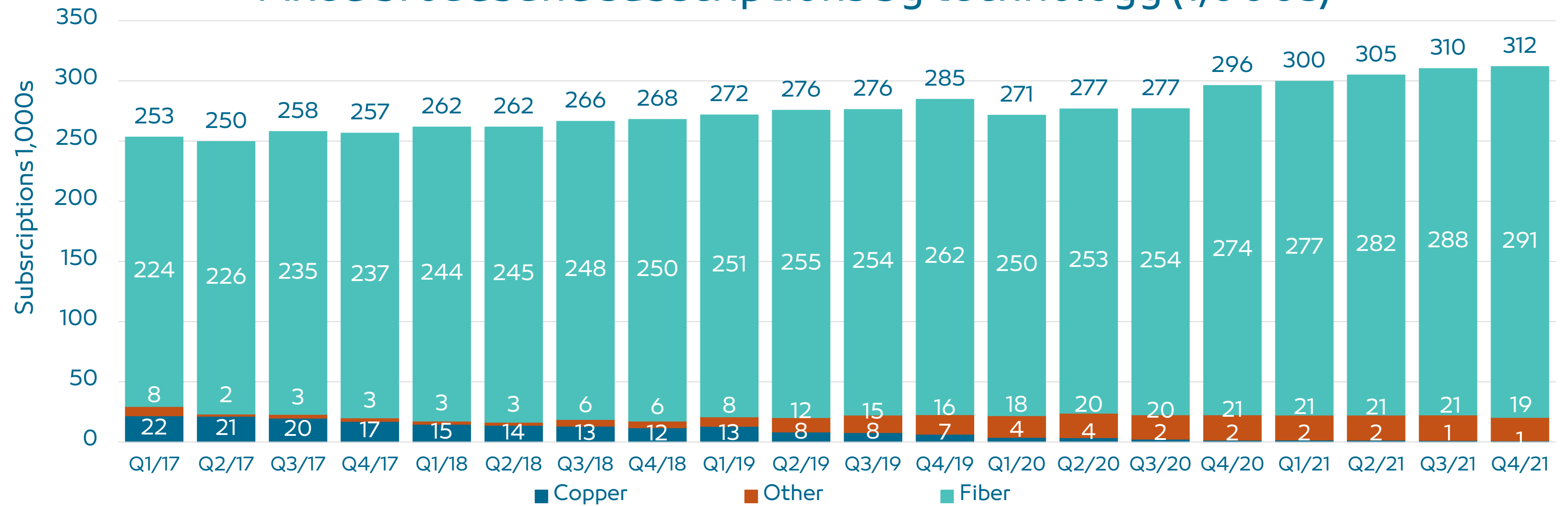
Fixed voice and broadband subscriptions (1,000s)



FIXED BROADBAND BY TECHNOLOGY

Fiber is by far the most prevalent fixed technology in Qatar.

Fixed broadband subscriptions by technology (1,000s)

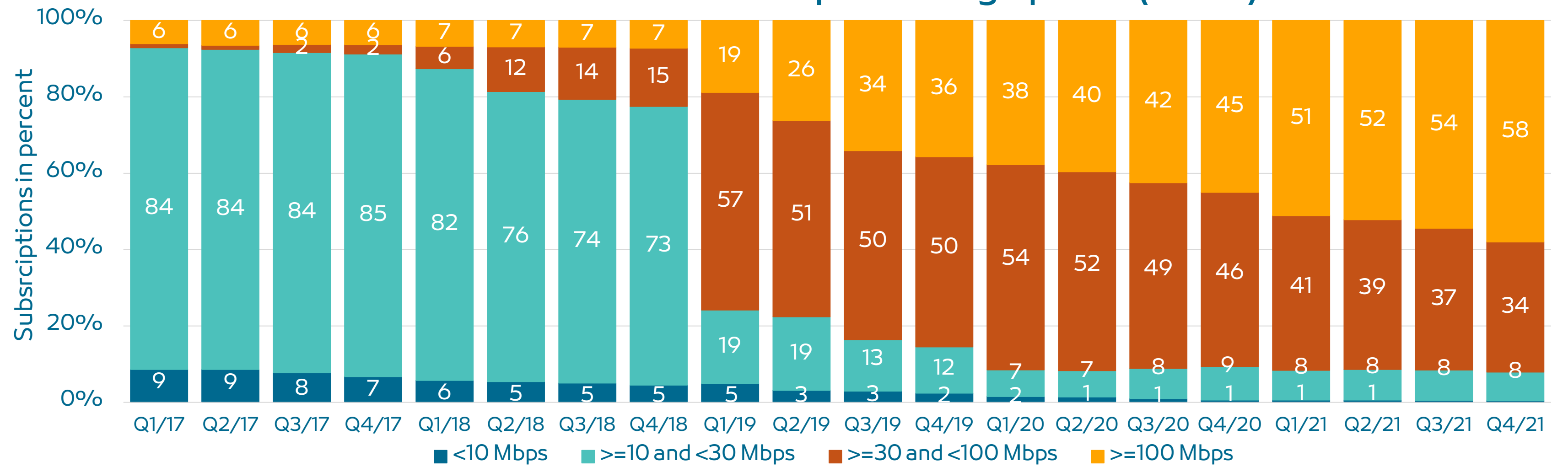


Source: Market Data Study section elaborations on SP data
 Since Q1 2019, other technology mainly represents Fixed Wireless Access (FWA).

FIXED BROADBAND BY SPEED

More than half of fixed subscriptions are for 100 Mbps or more. Speeds are continuously being upgraded.

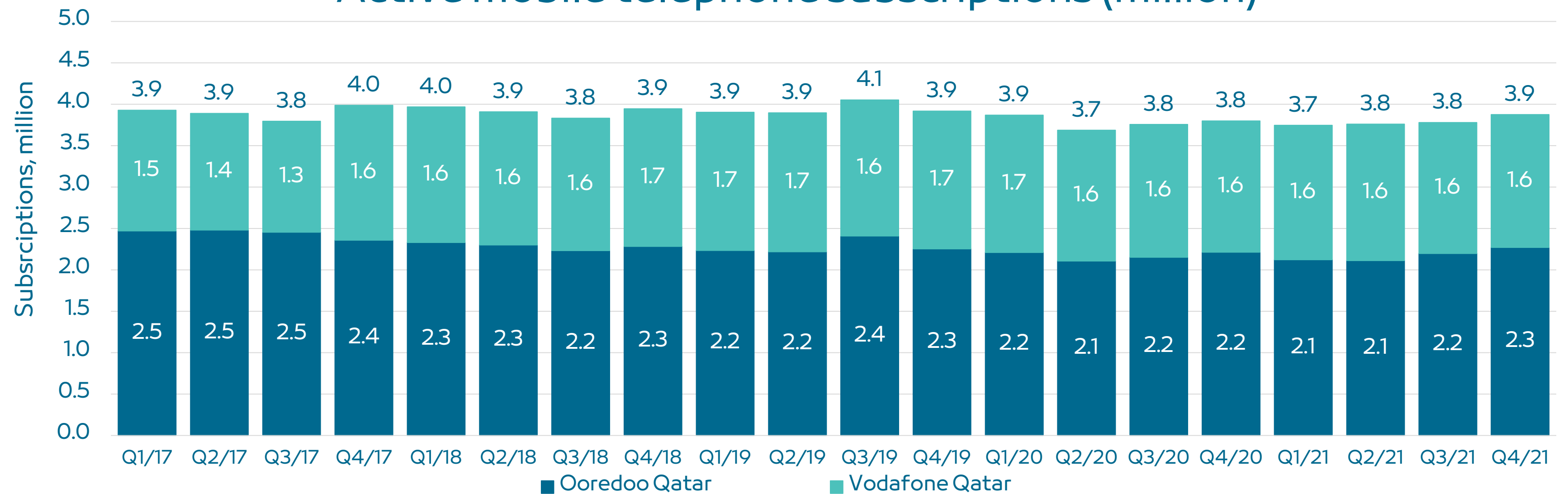
Fixed broadband subscriptions by speed (in %)



ACTIVE MOBILE TELEPHONE SUBSCRIPTIONS

The total number of mobile subscriptions is quite stable.

Active mobile telephone subscriptions (million)

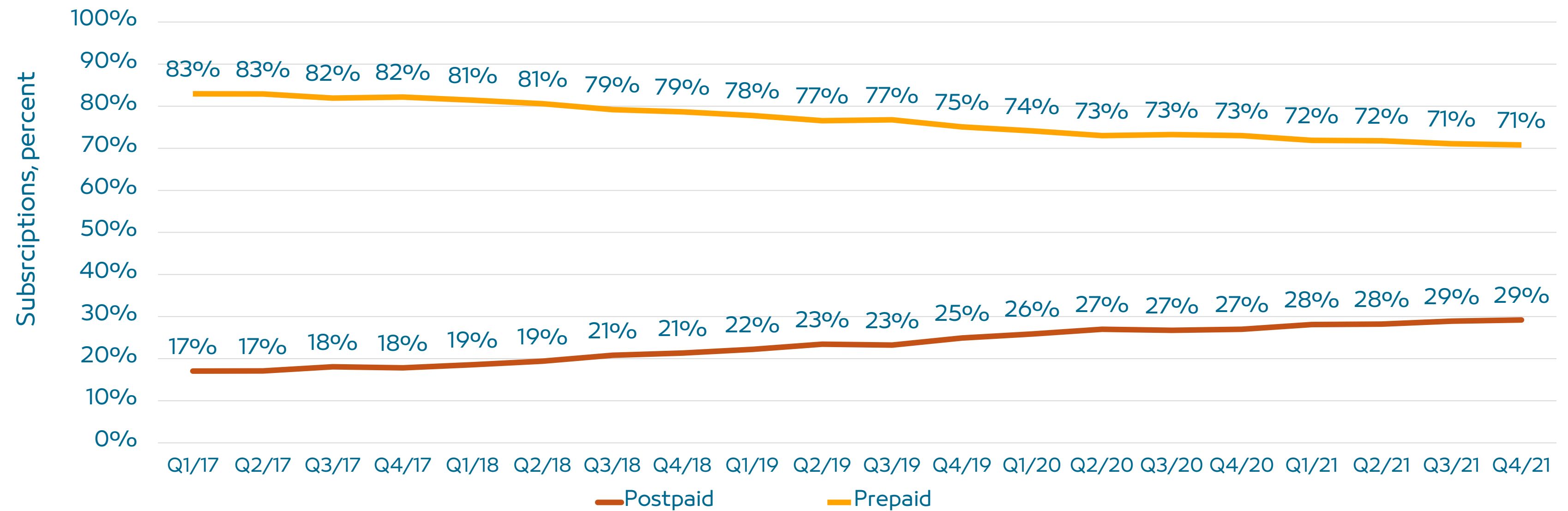


Source: Market Data Study section elaborations on SP data
 Mobile telephone subscriptions include voice & data subscriptions and voice only subscriptions but exclude broadband only and M2M subscriptions

ACTIVE MOBILE TELEPHONE SUBSCRIPTIONS PER TYPE OF CONTRACT

Postpaid mobile subscriptions are on an increasing trend.

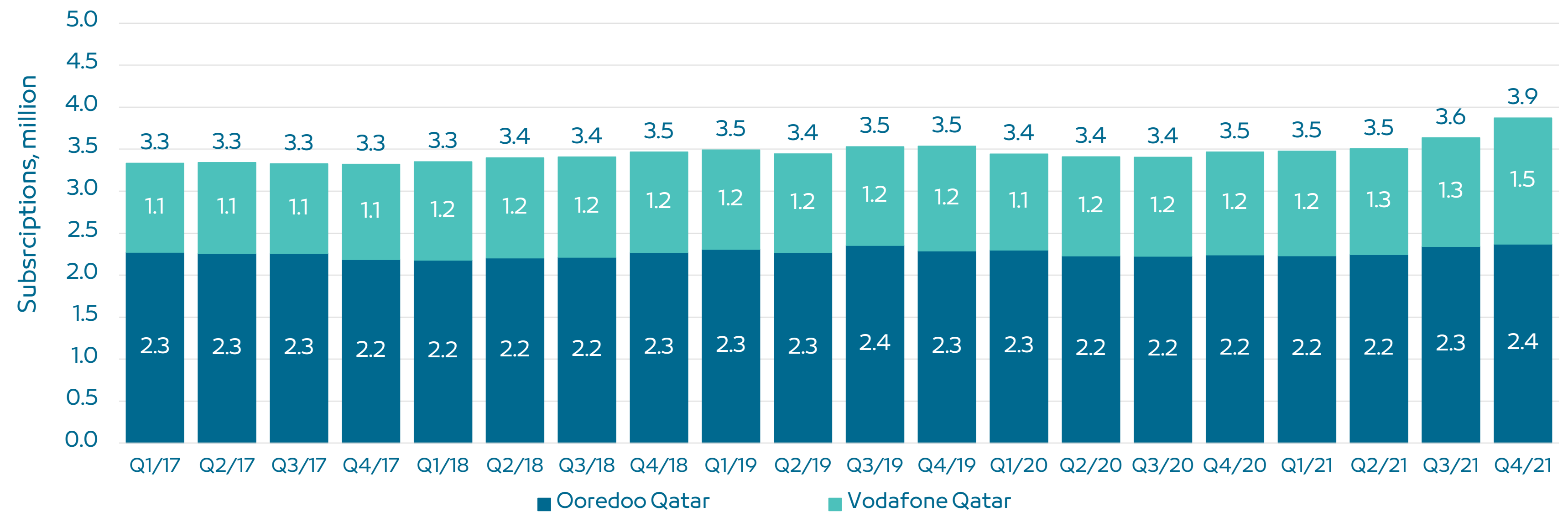
Active mobile prepaid and postpaid subscriptions



ACTIVE MOBILE BROADBAND SUBSCRIPTIONS

The number of mobile broadband subscriptions was earlier quite stable. The number has increased for Q4/21 due to migration from voice only.

Active mobile broadband subscriptions (million)

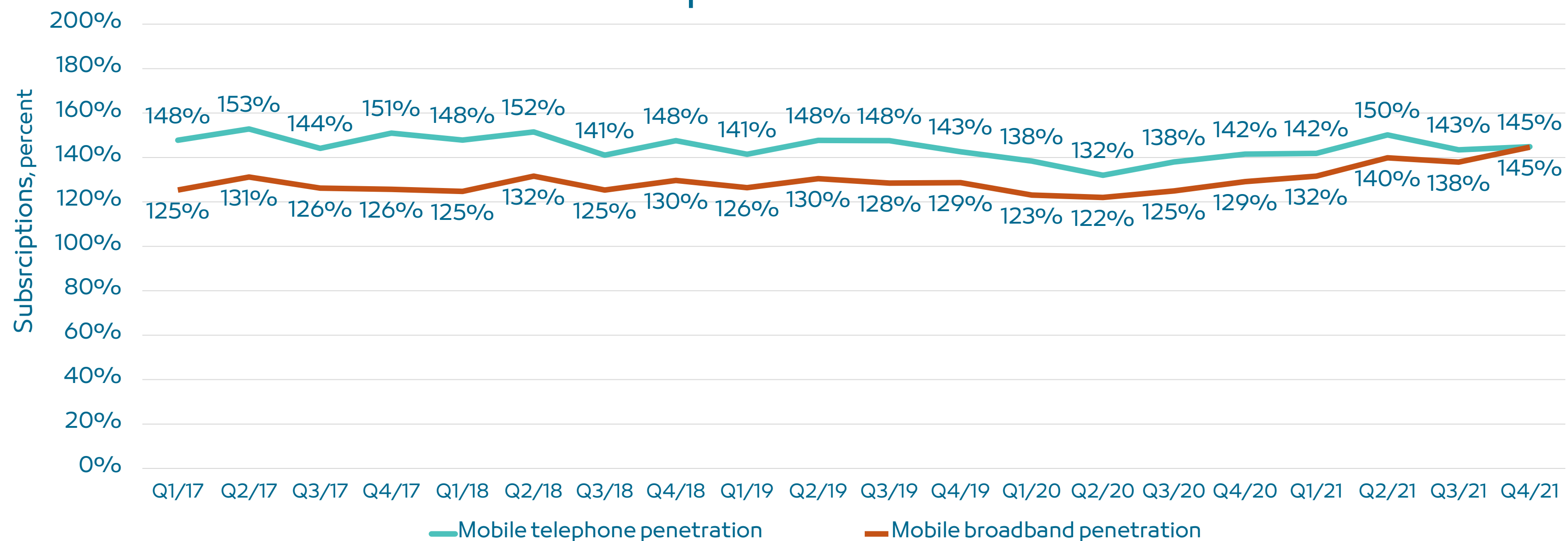


Source: Market Data Study section elaborations on SP data
 Mobile broadband subscriptions include voice & data and broadband only subscriptions but exclude voice only and M2M subscriptions

MOBILE PENETRATION RATIOS

Overall, mobile penetration ratios are quite stable.
Migration to mobile broadband has increased broadband penetration.

Mobile penetration ratios

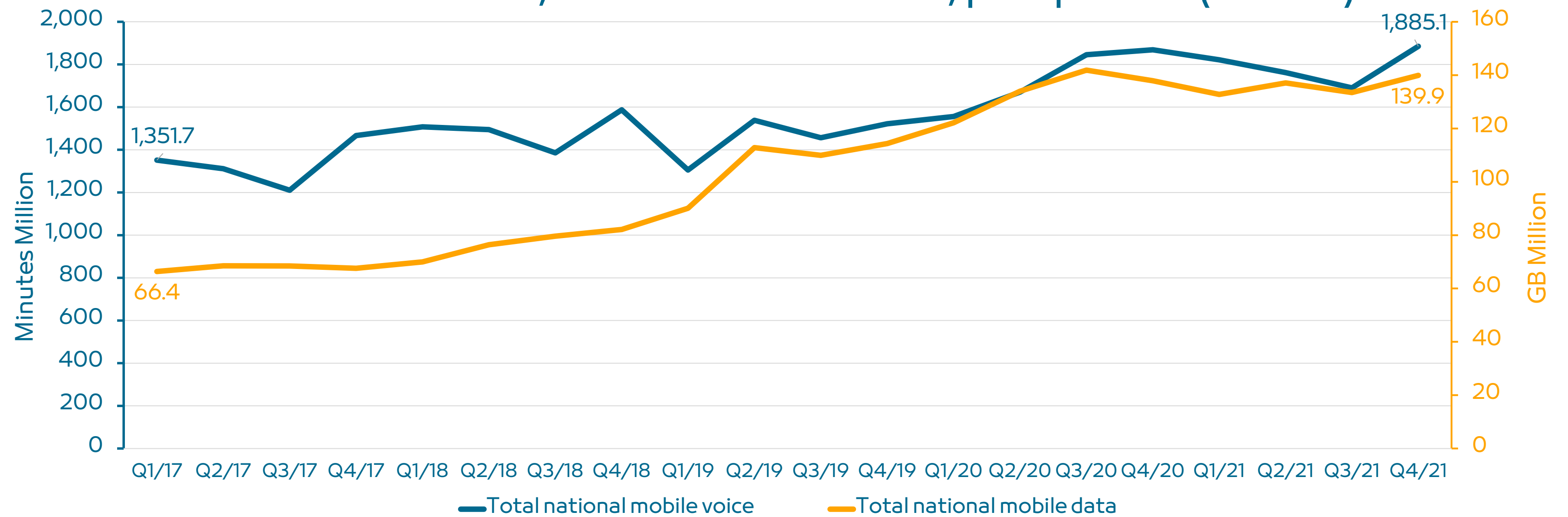


Source: Market Data Study section elaborations on SP data
Penetration ratio is calculated as subscriptions divided by population * 100.
There was a change in definition of MBB in Q1 2017

NATIONAL MOBILE TRAFFIC PER SUBSCRIPTION

National mobile traffic is in general on an increasing trend.
National mobile traffic has rebounded the last quarter.

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



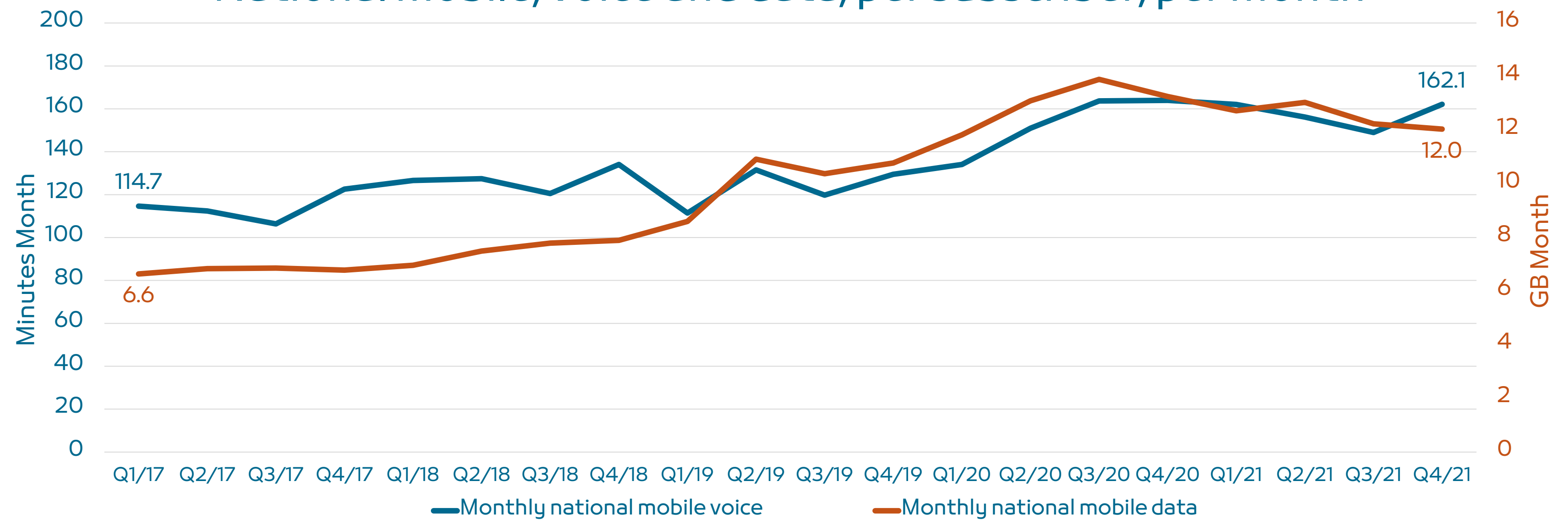
Source: Market Data Study section elaborations on SP data

NATIONAL MOBILE TRAFFIC



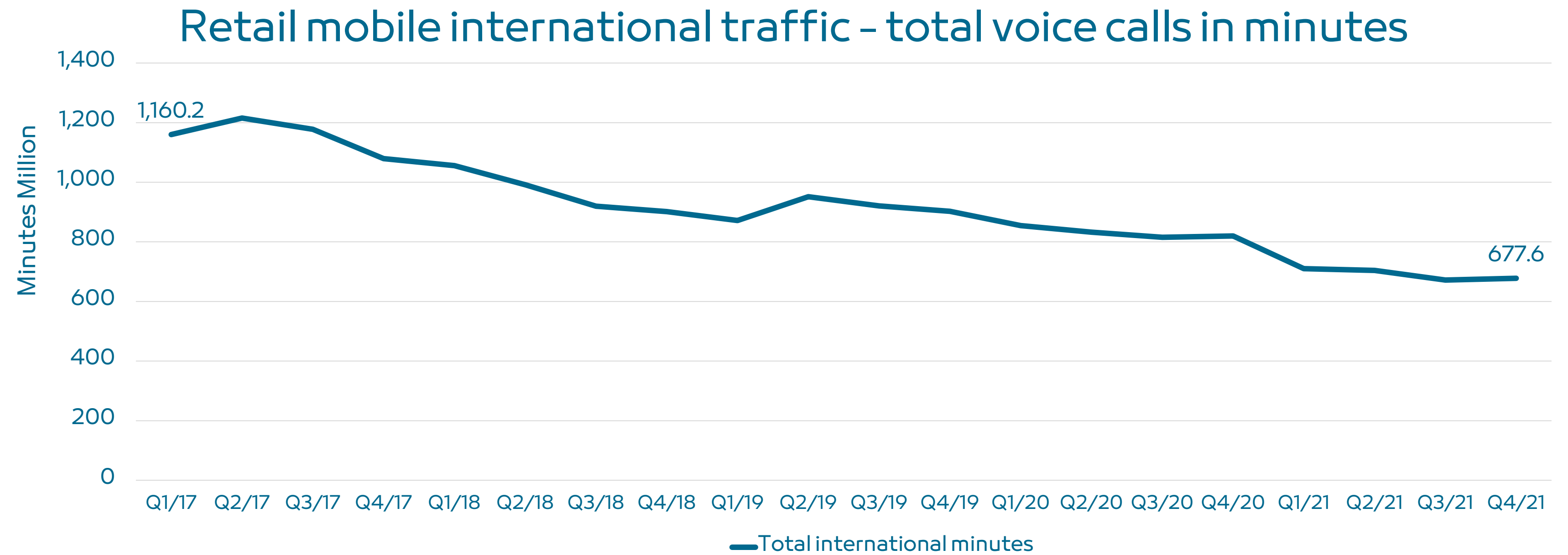
National mobile traffic was earlier increasing, especially for mobile data, and has stagnated the last five quarters.

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



INTERNATIONAL MOBILE VOICE TRAFFIC

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



The background of the slide features a blurred image of a person in a white lab coat pointing at a financial chart. The chart is a candlestick chart with a red line connecting the closing prices of the candles. The overall color scheme is light blue and white.

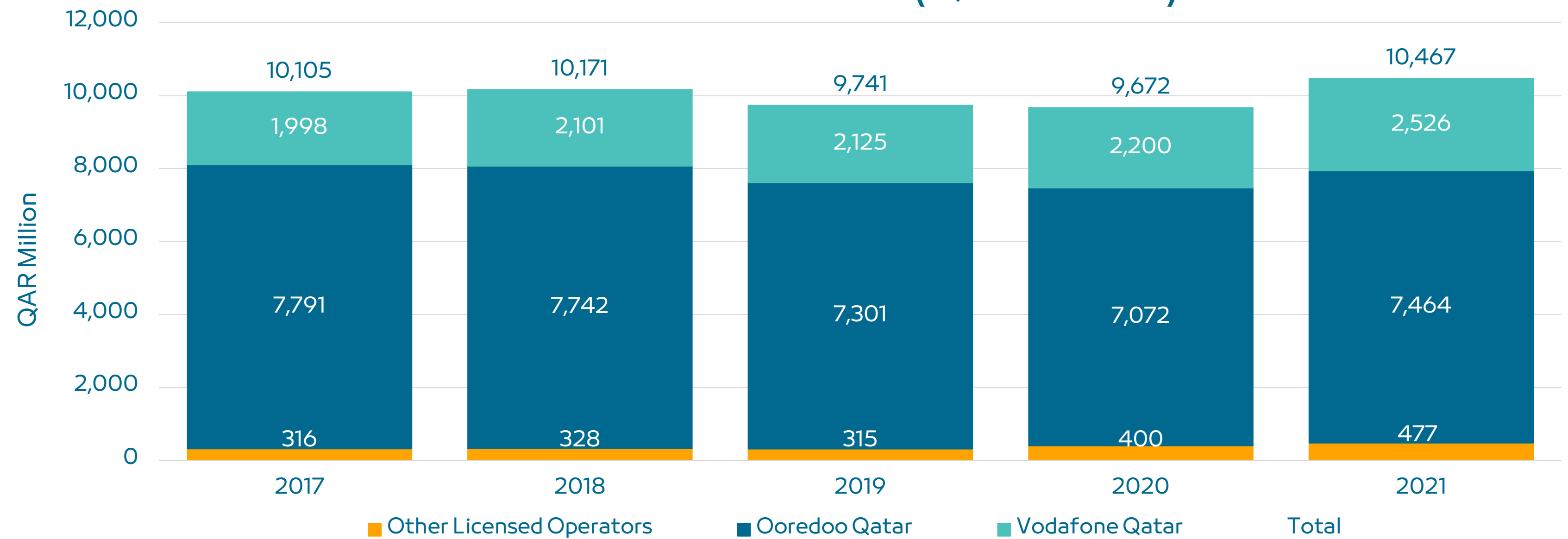
FINANCIAL INFORMATION

Key indicators

TELECOM SECTOR: REVENUE

Telecom sector revenue has amounted to about QAR 10 Billion per year, and has increased for 2021.

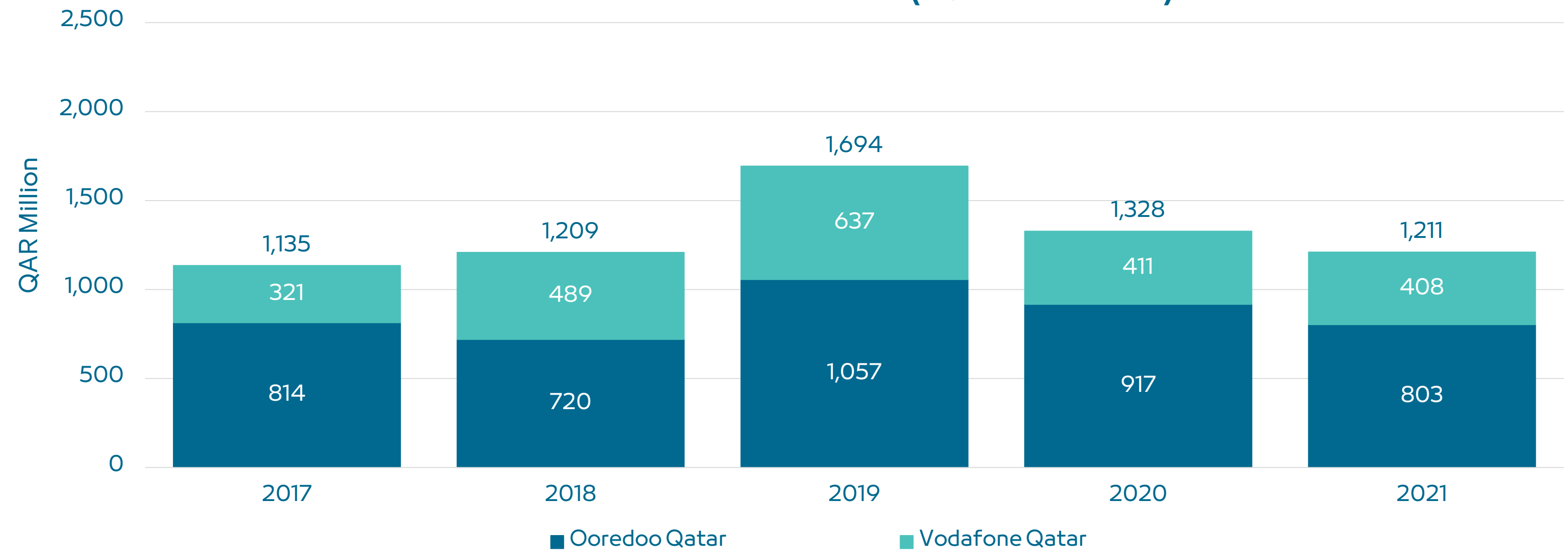
Telecom sector revenue (QAR Million)



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.

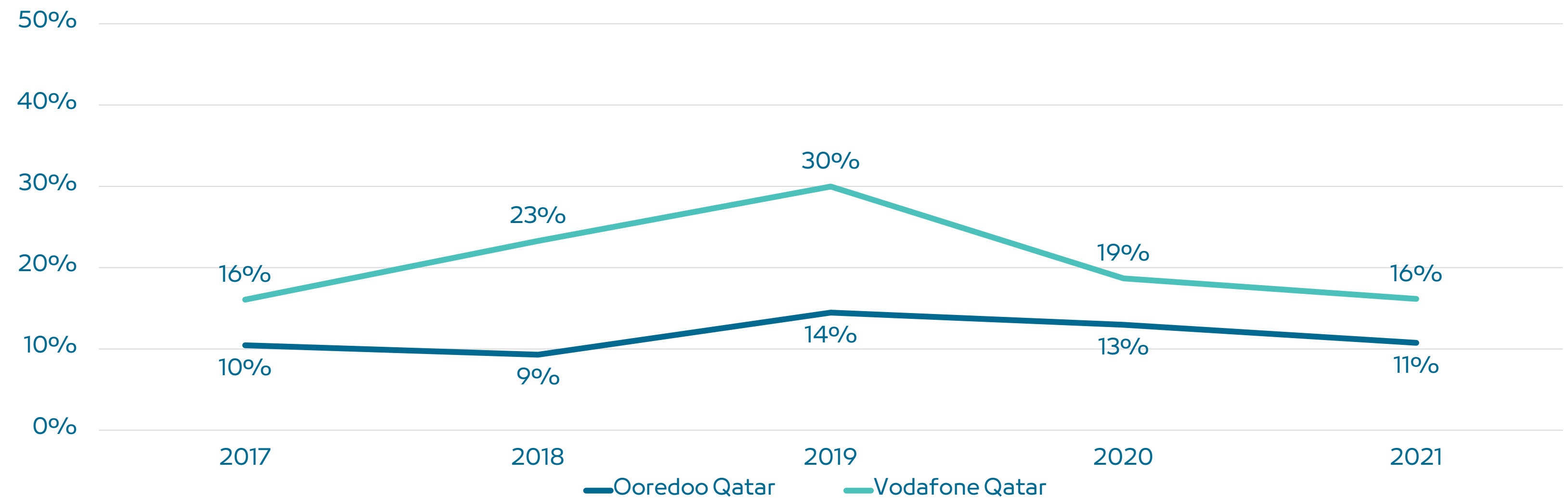
Telecom sector CAPEX (QAR Million)



TELECOM RETAIL SECTOR: CAPEX

Investments as a percentage of revenue account for a substantial amount for both Service Providers.

Telecom sector CAPEX (percent of revenue)



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





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

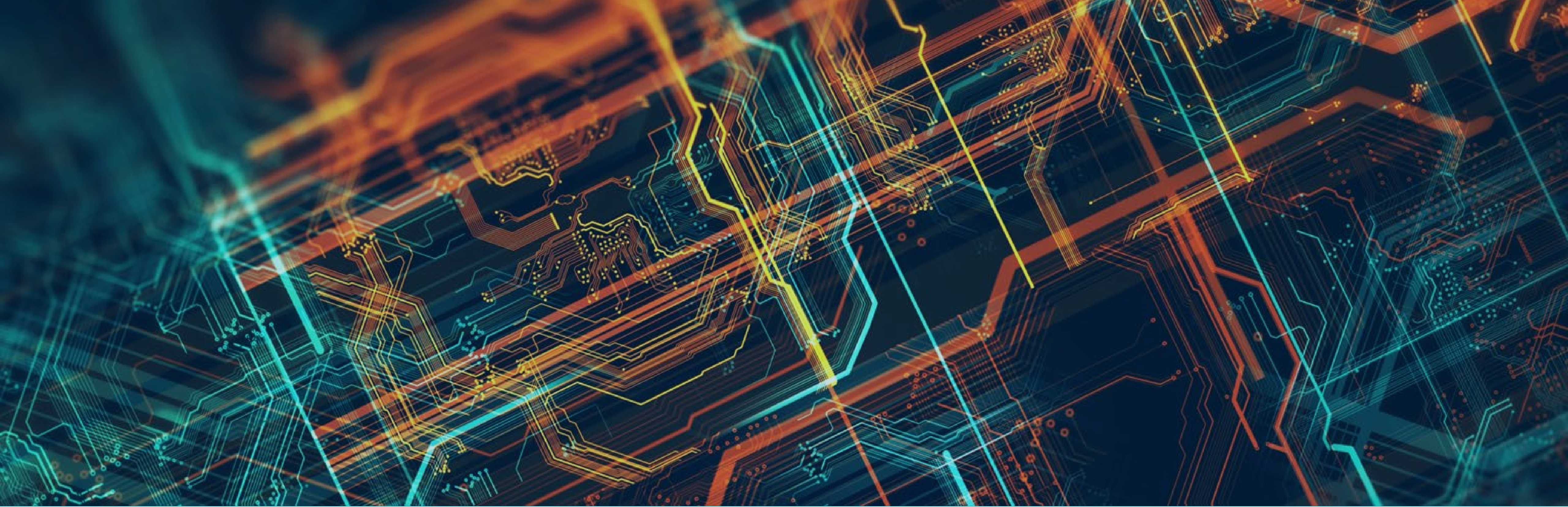
Data and voice mobile-broadband subscriptions refers to subscriptions to mobile-broadband services that allow access to the open Internet via HTTP and in which data services are contracted together with voice services (mobile voice and data plans) or as an add-on package to a voice plan. These are typically 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.



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