Communications Regulatory Authority
State of Qatar

هيئة تنظيم الاتصالات
دولة قطر

TELECOMMUNICATIONS MARKET-QATAR

No. 3/2023

Based on data as of Q3 2023

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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 2022

3.1 MILLION
Qatar Population (Q3 2023)

11.6 BILLION
Telecom Sector Revenue (QAR)

1.4 BILLION
Retail Telecom Sector Investments (QAR)

864 BILLION
GDP, current (QAR)

237 BILLION
GDP, current (USD)

82 THOUSAND
GDP, per capita (USD)

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Source: Market Data Study elaborations on SP data; PSA
GDP data is the based on the latest update from PSA.
Population 31 December 2022: 2.9 million
Exchange rate: 3.64 QAR/USD

FIXED SNAPSHOT
Q3 2023

0.5 MILLION
Voice Subscriptions

99 %
Fiber Population Coverage

86 %
Broadband Fiber subscriptions

0.3 MILLION
Broadband Subscriptions

81 %
Subscriptions Above 100 Mbps

70 TH GLOBALLY
ITU Price Baskets 2022 Affordability Index Fixed Broadband Basket

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Source: Market Data Study elaborations on SP data; PSA, ITU

MOBILE SNAPSHOT

Q3 2023

4.5 MILLION
Broadband Subscriptions

15 GB
Data Per Subscription Per Month

131 MINUTES
National Voice Per Subscription Per Month

148 %
Broadband Population Penetration

98.3 %
5G Population Coverage

8 TH GLOBALLY
ITU Price Basket 2022 Affordability Index. (Mobile Data & Voice High Consumption Basket)

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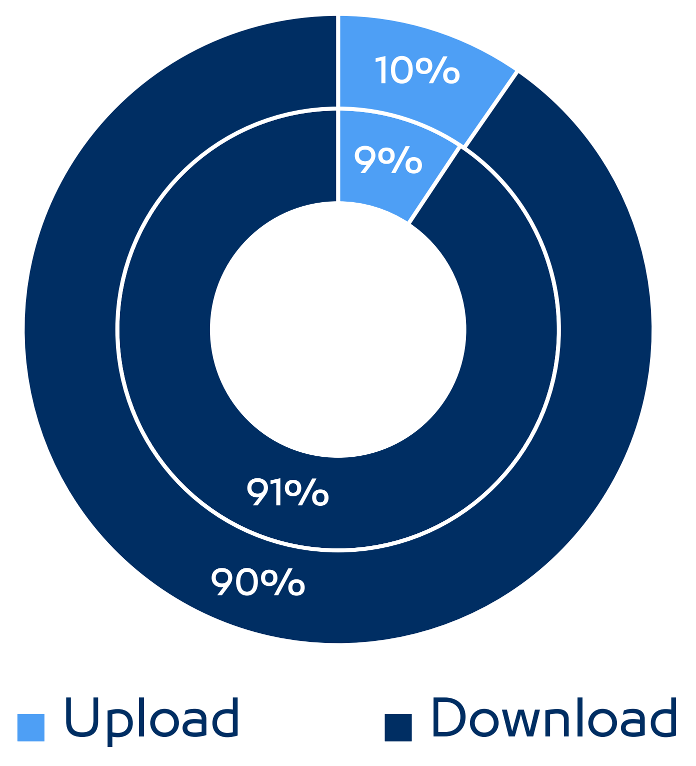
Source: Market Data Study elaborations on SP data; PSA; ITU

FIXED & MOBILE DATA UP- & DOWNLOAD

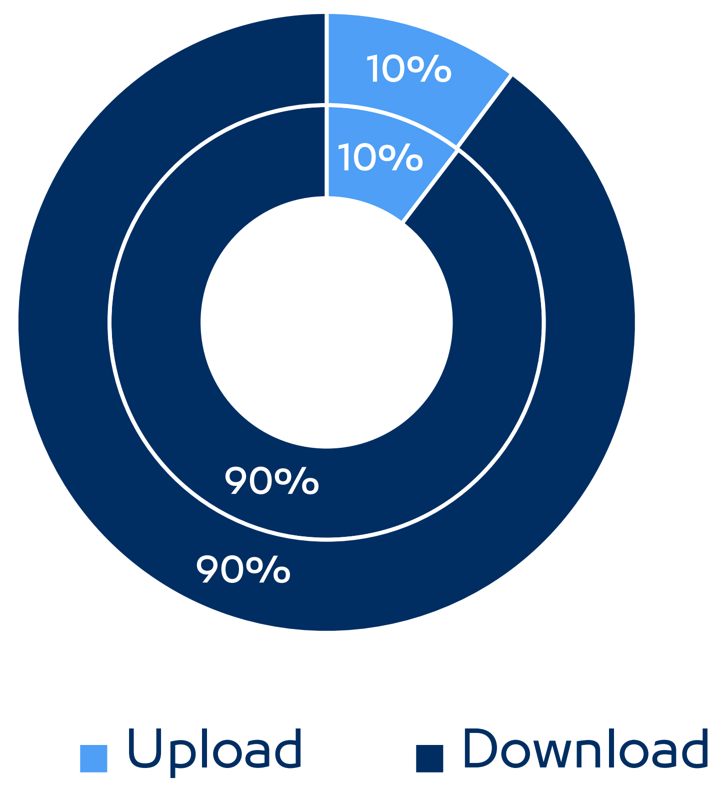
Fixed and Mobile data download is about
9 times higher than data upload.

Fixed data up- & download



Q3 2023: Outer circle
Q3 2022: Inner circle

Mobile data up- & download



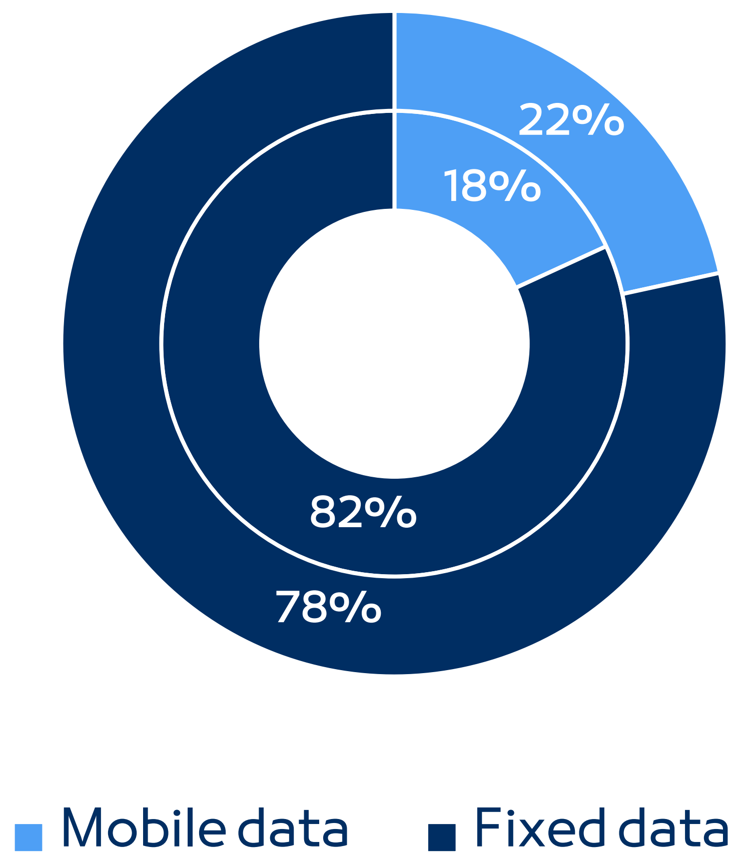
Q3 2023: Outer circle
Q3 2022: Inner circle

Source: Market Data Study section elaborations on SP data
The diagrams above were introduced in Q1 2023.

FIXED & MOBILE DATA & MAIN REVENUE SOURCES

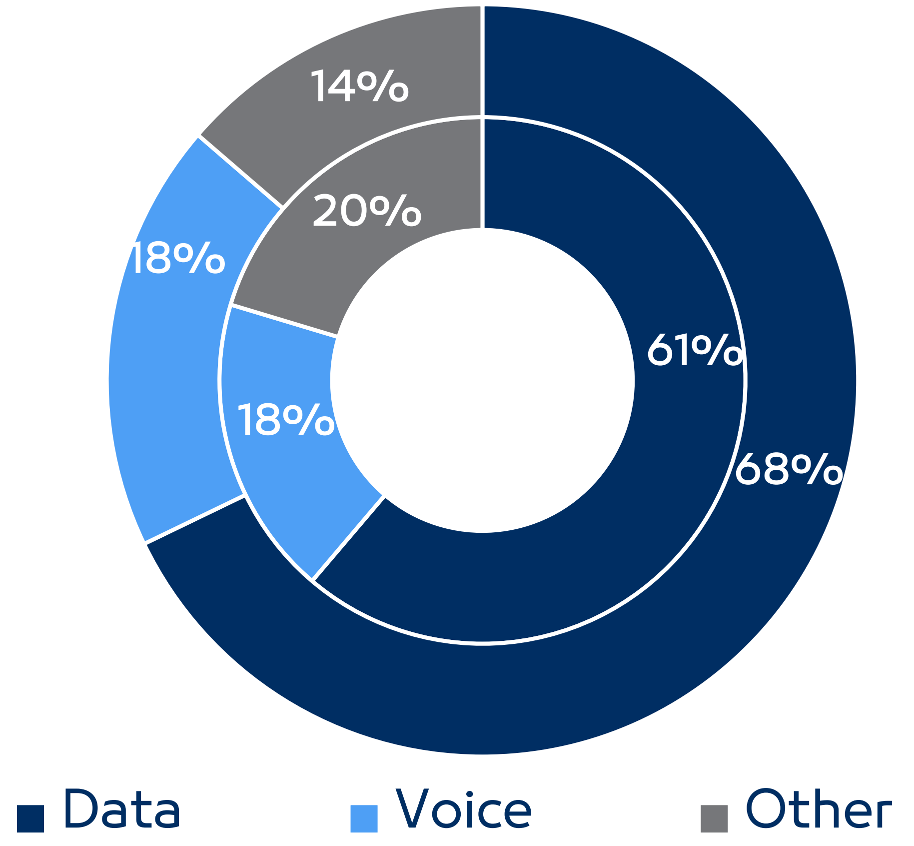
Fixed data traffic is about 4 times higher than mobile data traffic.
Revenue from data amounts to 2/3 of all telecom revenue.

Mobile & Fixed data



Q3 2023: Outer circle
Q3 2022: Inner circle

Telecom revenue sources



Q3 2023: Outer circle
Q3 2022: Inner circle

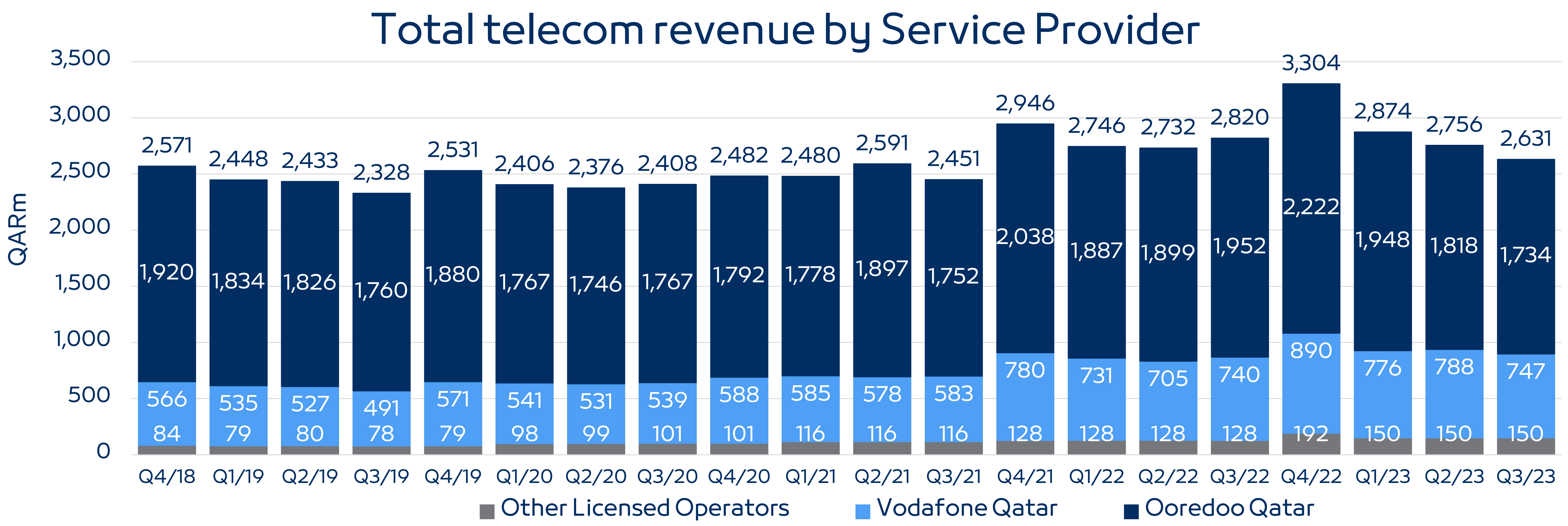
Source: Market Data Study section elaborations on SP data.
The diagrams above were introduced in Q1 2023.
Revenue for voice and data is to a certain extent based on SPs' allocation models.

SECTOR STATISTICS

Key indicators

TOTAL SECTOR REVENUE BY SP

After the FWC Qatar 2022, total sector revenue for Q3 2023 has decreased below the long-term trend of QAR 2.8 million.



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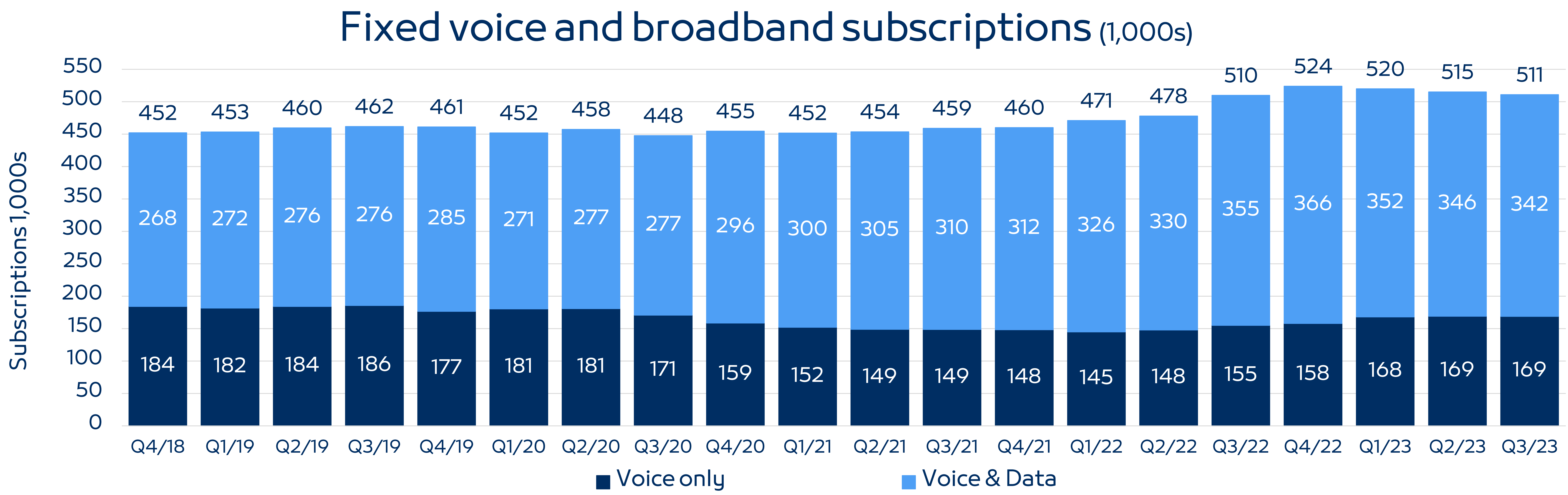
Revenue for Other Licensed Operators is to a certain extent based on forecasts

FIXED VOICE & BROADBAND

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

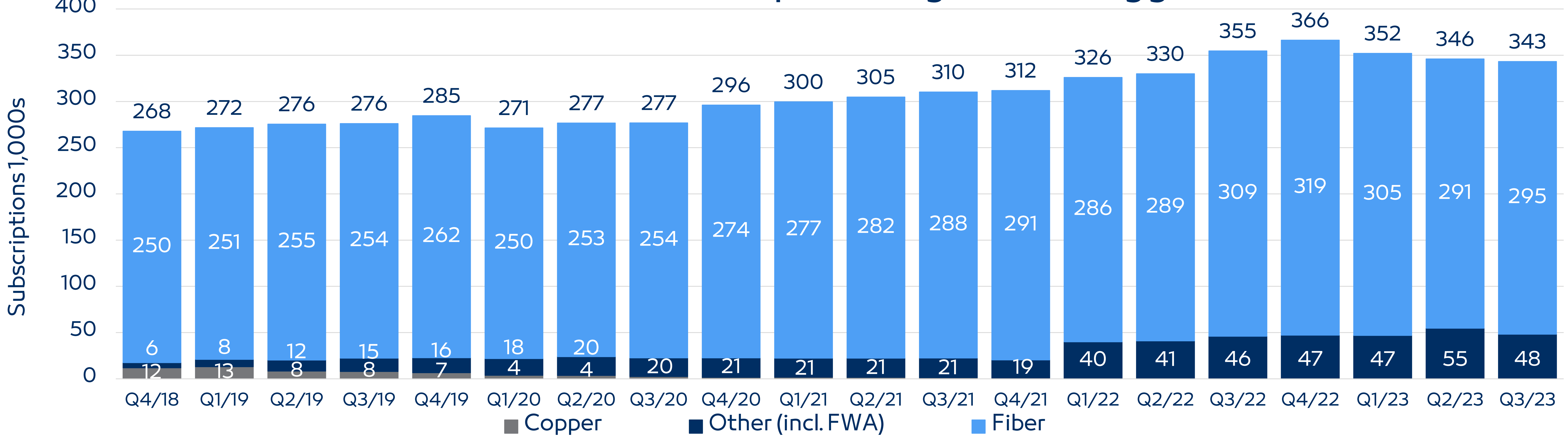


Source: Market Data Study section elaborations on SP data

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 subscriptions by technology (1,000s)

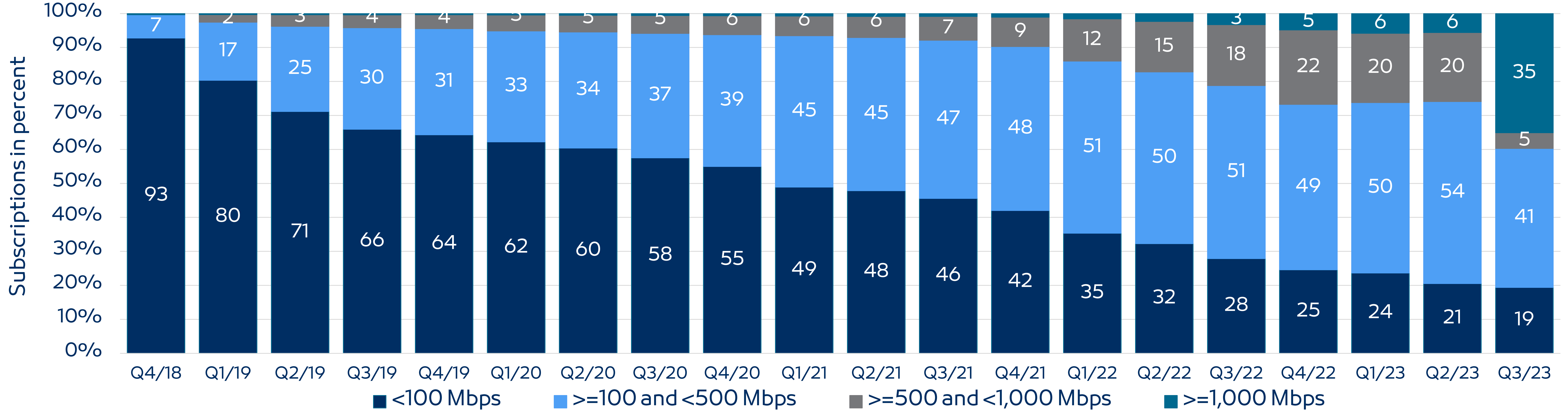


Source: Market Data Study section elaborations on SP data
Since Q1 2019, other technology mainly represents Fixed Wireless Access (FWA).

FIXED BROADBAND BY SPEED

For Q3 2023, 81% of fixed subscriptions are for 100 Mbps or more.
Both SPs have recently upgraded many plans to 1 Gbps.

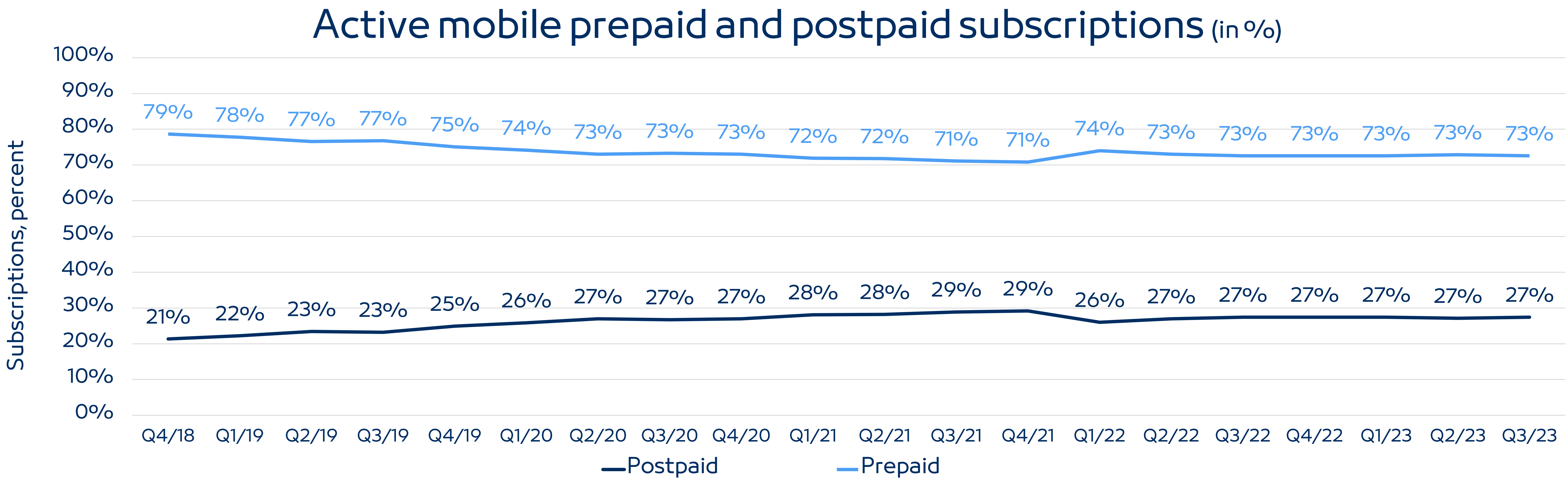
Fixed broadband subscriptions by speed (in %)



Source: Market Data Study section elaborations on SP data.
Speed brackets have been updated as per Q1 2023.

ACTIVE MOBILE TELEPHONE SUBSCRIPTIONS PER TYPE OF CONTRACT

Postpaid mobile subscriptions have recently stabilized at 27%



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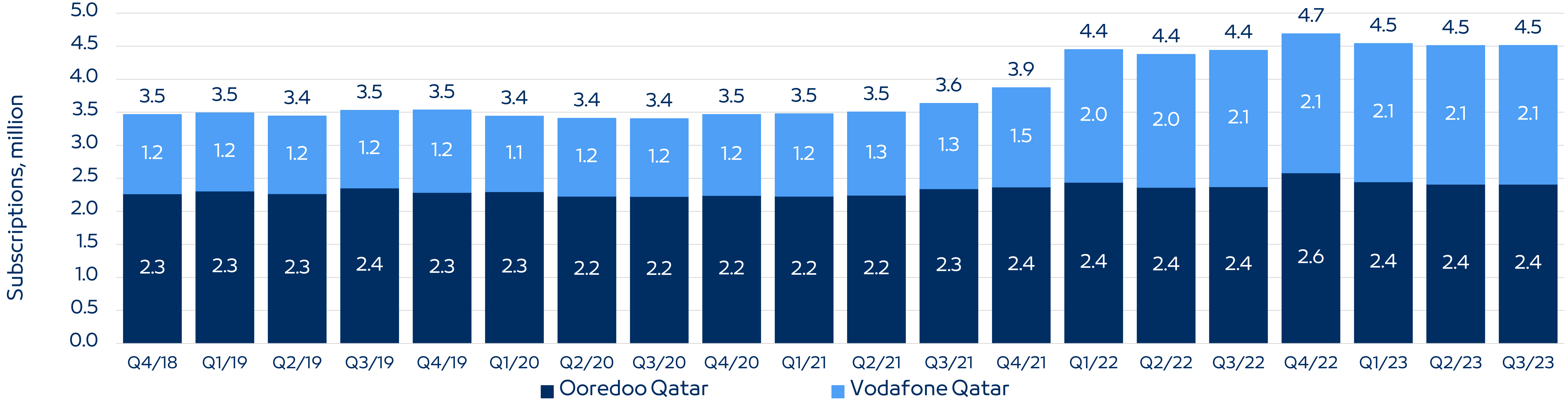
Source: Market Data Study section elaborations on SP data

ACTIVE MOBILE BROADBAND SUBSCRIPTIONS

The number of mobile broadband subscriptions have been quite stable around 4.5 million since Q1 2022.

Active mobile broadband subscriptions (million)

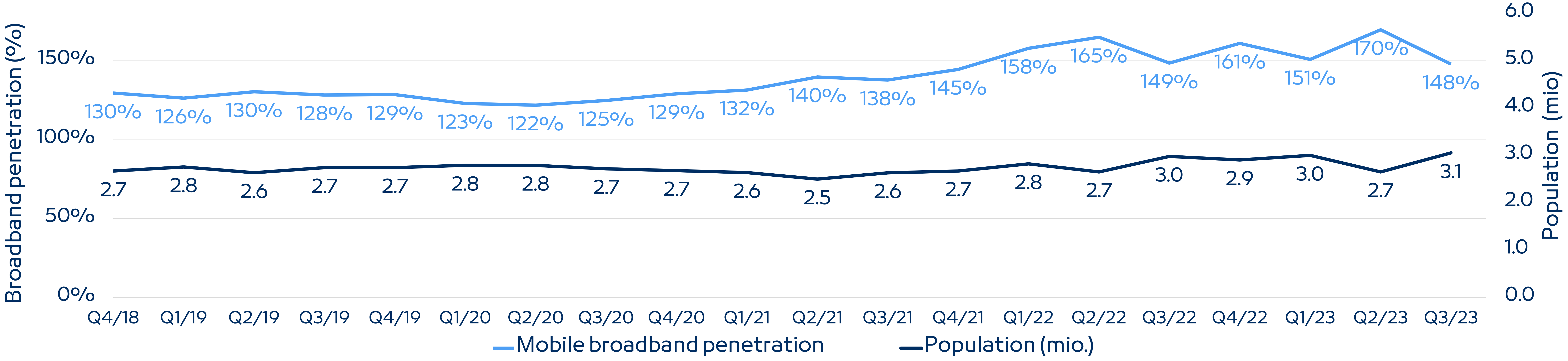


Source: Market Data Study section elaborations on SP data
Mobile broadband subscriptions include voice & data and broadband only subscriptions but exclude voice only and M2M subscriptions
SPs changed calculation methodologies as of Q1 2022

MOBILE PENETRATION & POPULATION

Mobile broadband penetration has reached a level around 150 %.

Mobile broadband penetration & population



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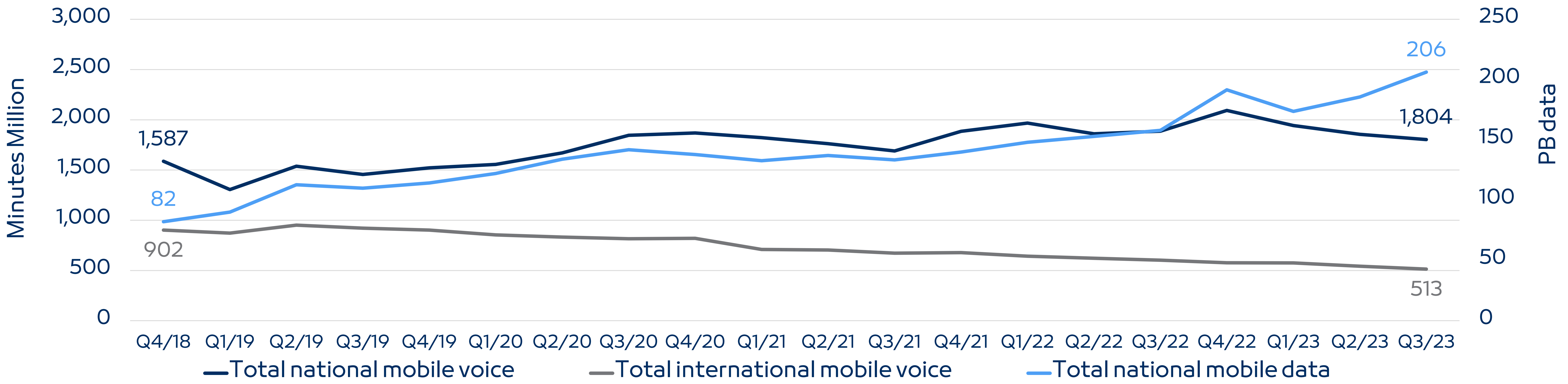
Source: Market Data Study section elaborations on SP data
Penetration ratio is calculated as "subscriptions /population * 100".
SPs changed calculation methodologies as of Q1 2022

NATIONAL 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



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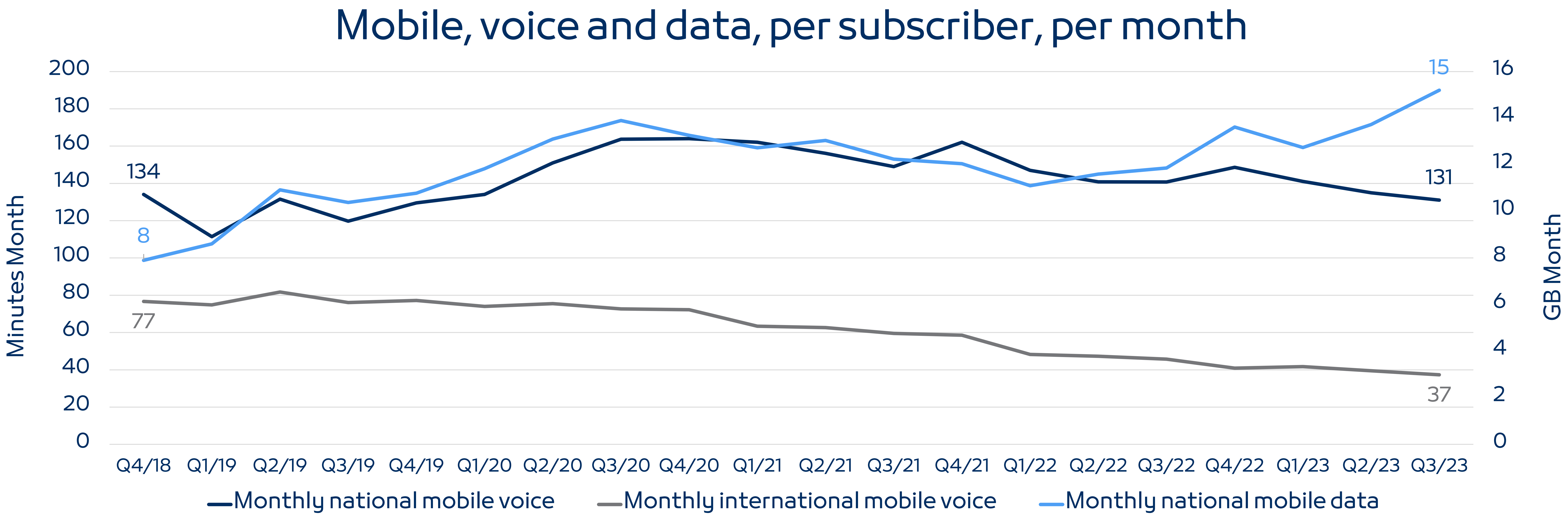
Source: Market Data Study section elaborations on SP data

NATIONAL MOBILE TRAFFIC PER SUBSCRIPTION

National mobile traffic per subscriber returned in Q3 2023 to the long-term trend.



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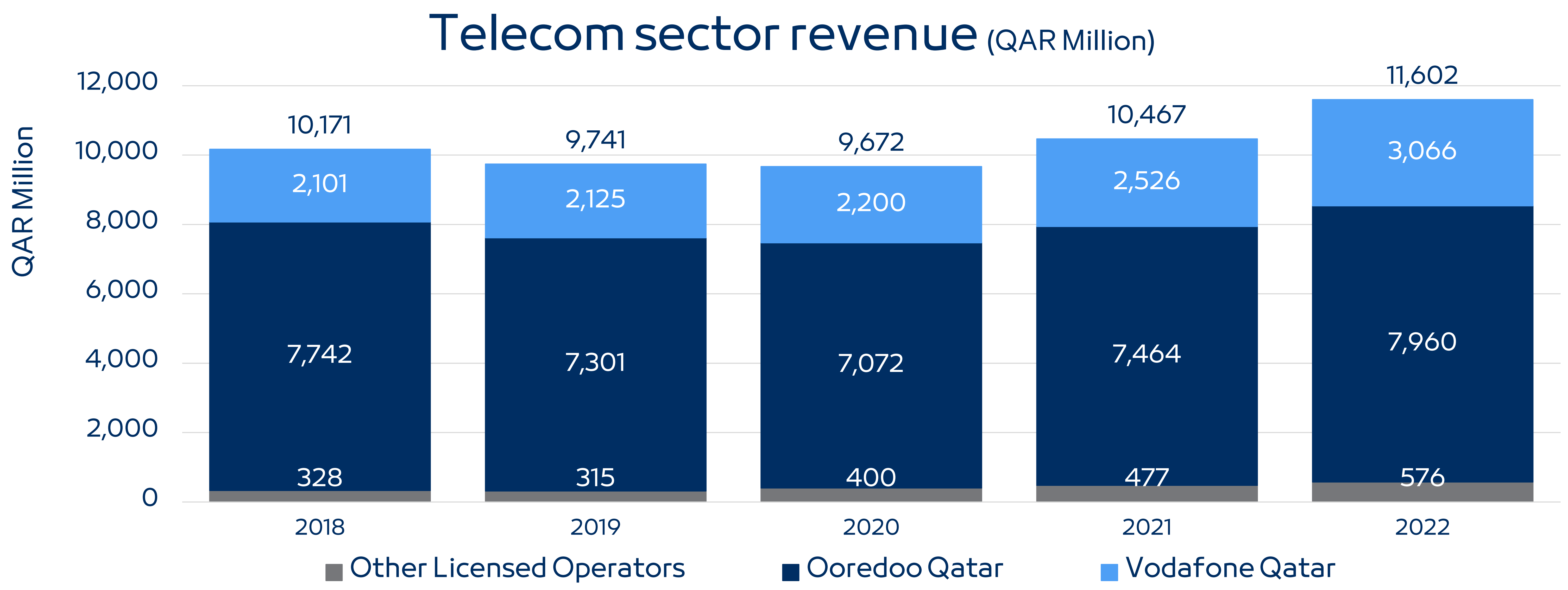
Source: Market Data Study section elaborations on SP data

FINANCIAL INFORMATION

Key indicators

TELECOM SECTOR: REVENUE FULL YEAR

Telecom sector revenue reached a new level above QAR 11 Billion for 2022.
The FWC Qatar 2022 contributed with revenue of 0.5 QAR Billion in 2022.



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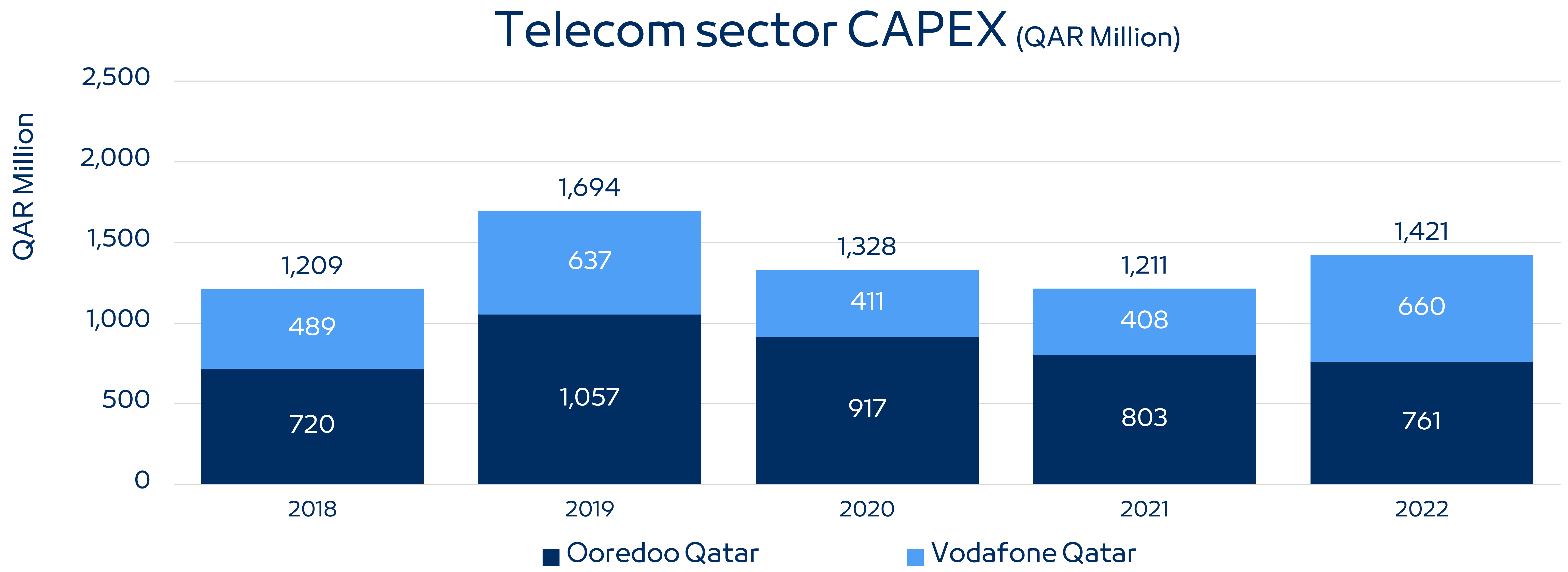
Source: Market Data Study section elaborations on SP data

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.



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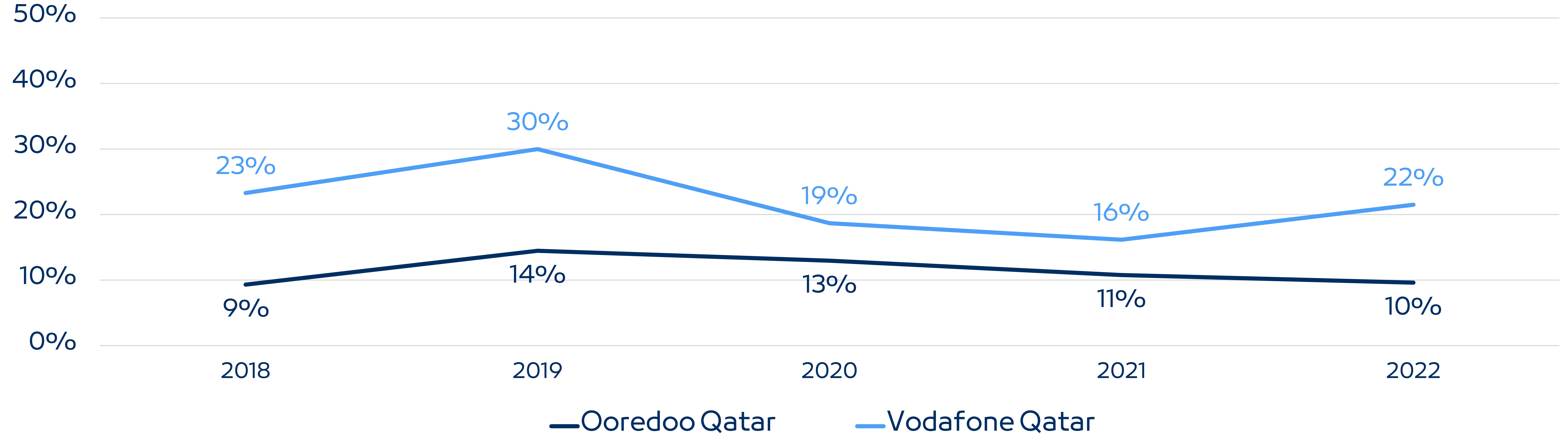
Source: Market Data Study section elaborations on SP data

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)



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Source: Market Data Study section elaborations on SP data

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

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