

PO Box 2374 Amman 11821 – Jordan Tel. 962.6.5828849 | Fax. 962.6.5828809 arabadvisors@arabadvisors.com www.arabadvisors.com

## An Overview of the Telecom Market Landscape in 18 Arab Countries

**Arab Advisors Group Strategic Research Service** 

February 2015

**Analyst: Dalia Haddad** 

This report has been delivered to *Client* as part of the subscription to the Arab Advisors Group Strategic Research Service to be used exclusively by its employees

**Copyright notice:** Copyright 2015 by Arab Advisors Group. All rights reserved. No material contained in this report may be reproduced in whole or in part without the prior written permission of the publisher. Any unauthorized use, disclosure, copying, selling, distribution or in any way transfer of any direct or indirect information from this report which is the property of Arab Advisors Group, removing, erasing or hiding from view any copyright, trademark, confidentiality notice, mark or legend appearing on Arab Advisors Group products or any form of output is strictly prohibited, and will be under legal responsibility. The information contained in this report has been obtained from sources we believe to be reliable, but neither its completeness nor accuracy can be guaranteed. Opinions expressed are based on our interpretation of the available information, and are subject to change.

**Feedback:** Our clients' satisfaction is of our utmost concern. We welcome all feedback regarding our research and products. Please send us your notes on this report, what you found useful in it and future research directions that would help you in your business. Send feedback emails to: arabadvisors@arabadvisors.com



## **Table of Contents**

Section I: Introduction	1
Section II: Overview and comparisons	2
Section III: Detailed overview of MENA countries	
Qatar	5
UAE	12
Bahrain	20
Saudi Arabia	25
Oman	32
Jordan	38
Kuwait	44
Tunisia	49
Egypt	52
Lebanon	
Morocco	
Algeria	67
Libva	
Yemen	
Mauritania	
Palestine	_
Svrja	
Iraq	
11 ay	

## **List of Exhibits**

Exhibit 1: Fixed voice, fixed Internet and cellular competitive landscape	2
Exhibit 2: LTE, 3G and FTTx availability	3
Exhibit 3: Cellular, fixed voice and fixed broadband penetration rates b	y Q3
2014	3
Exhibit 4: Cellular, fixed voice and Internet ARPUs by end of 2014	4
Exhibit 5: Qatar's LTE development timeline	6
Exhibit 6: Submarine cables with landing points in Qatar	7
Exhibit 7: Qatar's cellular, fixed voice and Internet ARPU for 2013	8
Exhibit 8: Percentage of users on social network platforms	9
Exhibit 9: Internet and computer penetration rate among Busi	ness
establishments, Overall and by Size in 2012	9
Exhibit 10: Ooredoo's Data Center services	10
Exhibit 11: Hukoomi's main sections	
Exhibit 12: LTE development timeline the UAE	13
Exhibit 13: Submarine cables with landing points in the UAE	15
Exhibit 14: Submarine cable systems connecting two countries with lar	ding
points in the UAE	
Exhibit 15: Cellular, fixed voice and Internet ARPU for 2012	16
Exhibit 16: Respondents accounts on social media platforms	
Exhibit 17: Etisalat's cloud computing and hosted solutions	18
Exhibit 18: du's cloud computing and hosted solutions	
Exhibit 19: LTE development timeline Bahrain	
Exhibit 20: Submarine cables with landing points in Bahrain	
Exhibit 21: Cellular, fixed voice and Internet ARPU for 2013	
Exhibit 22: CITC's licenses types (February 2015)	25
Exhibit 23: STC investments	26
Exhibit 24: The international submarine cables and their landing points in S	audi
Arabia	28
Exhibit 25: Cellular, fixed voice and Internet ARPU for 2013	29
Exhibit 26: Respondents accounts on social media platforms	30
Exhibit 27: STC and Mobily's cloud computing and hosted solutions	30
Exhibit 28: Submarine cable that connect Oman to another country	34
Exhibit 29: Cellular, fixed voice and Internet ARPU for 2013	34
Exhibit 30: Respondents accounts on social media platforms	35
Exhibit 31: Omantel's cloud computing and hosted solutions	36
Exhibit 32: TRC licenses fees	39
Exhibit 33: Submarine cables with landing points in Jordan	41

Exhibit 34: Submarine cables with landing points in Kuwait46
Exhibit 35: Submarine cables with landing points in Tunisia50
Exhibit 36: Cellular, fixed voice and Internet ARPU for 201350
Exhibit 37: Mobinil, Vodafone Egypt and Etisalat Misr revenue share53
Exhibit 38: Submarine cable systems connecting two countries with landing
points in Egypt54
Exhibit 39: Cellular, fixed voice and Internet ARPU for 201355
Exhibit 40: Respondents accounts on social media platforms56
Exhibit 41: TE Data hosting solutions57
Exhibit 42: Vodafone's cloud computing and hosted solutions57
Exhibit 43: The international submarine cables and their landing points in
Lebanon61
Exhibit 44: Cellular, fixed voice and Internet ARPU for 201362
Exhibit 45: Maroc Telecom Group's telecom subsidiaries by 201164
Exhibit 46: The international submarine cables and their landing points in
Morocco65
Exhibit 47: Cellular, fixed voice and Internet ARPU for 201365
Exhibit 48: Submarine cables with landing points in Algeria68
Exhibit 49: Cellular, fixed voice and Internet ARPU for 201269
Exhibit 50: Submarine cable systems connecting countries with landing points
in Libya72
Exhibit 51: The international submarine cables and their landing points in
Yemen74
Exhibit 52: Cellular, fixed voice and Internet ARPU for 201275
Exhibit 53: Mauritel's shareholders76
Exhibit 54: The international submarine cables and their landing points in
Mauritania77
Exhibit 55: Cellular, fixed voice and Internet ARPU for 201077
Exhibit 56: Palestine's cellular, fixed voice and Internet ARPU for 201379
Exhibit 57: Submarine cables with landing points in Syria81
Exhibit 58: Cellular, fixed voice and Internet ARPU for 201081
Exhibit 59: Submarine cables with landing points in Iraq83
Exhibit 60: Iraq's cellular, fixed voice and Internet ARPU for 201283





PO Box 2374 Amman 11821 – Jordan Tel. 962.6.5828849 | Fax. 962.6.5828809 arabadvisors@arabadvisors.com | www.arabadvisors.com