

Amman Tel. 962 6 568 1608 Fax. 962 6 568 1530 PO Box 2374, Amman 11821 Jordan

The 5G Promise: Is it Deliverable? What is Required? And Who's Doing What?

Subscribers to Arab Advisors Group's Strategic Research Service receive this report, and many others, as part of their paid subscription.

Non-subscribers can purchase this report entitled "The 5G Promise: Is it Deliverable? What is Required? And Who's Doing What?" for US\$ 3,500.

> Arab Advisors Group Strategic Research Service June 2019

This report has been delivered to *Client* as part of the subscription to Arab Advisors Group Strategic Research Service to be used exclusively by its employees. **Copyright notice:** Copyright 2019 by Arab Advisors Group. All rights reserved. Arab Advisors Group owns all copyrights and proprietary rights of this report. Any and all material contained in this report are not to be reproduced or distributed in whole or in part without the prior expressed and written permission of Arab Advisors Group. Any unauthorized use, disclosure, copying, selling, distribution or in any way transfer of any direct or indirect information from this report and commentary will be prosecuted. 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@arabadvisors.com



Table of Contents

Section I: Introduction	3
Section II: Status of MENA's Mobile Broadband Markets	6
Section III: Fiber's Role in Supporting 5G Networks	15
Section IV: 5G Trials and Tests by Cellular Operators	30
Section V: 5G Strategies and Roadmaps	37
Section VI: Allocated 5G Frequencies to Telecom Operators	41
Section VII: 4G Network Expansions	45
Section VIII: Conclusion and Arab Advisors Group's Team Notes	57



List of Exhibits

Exhibit 1: 5 Factors to a Successful 5G Launch5
Exhibit 2: Mobile Broadband Accounts for 15 Arab Countries (2016 -
2018)
Exhibit 3: Mobile Broadband Penetration Rates for 15 Arab Countries
(2016 – 2018)7
Exhibit 4: MENA's mobile data traffic per smartphone per month
(February 2019)15
Exhibit 5: Fiber Optics Household Penetration %16
Exhibit 6: 4G Coverage of Total Country45
Exhibit 7: Conclusion and Arab Advisors Group's Team Notes





PO Box 2374, Amman 11821- Jordan Tel. 962 6 568 1608 Fax. 962 6 568 1530 arabadvisors@arabadvisors.com | www.arabadvisors.com