

**WIRELESS**

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# The MENA 4G/5G mini panorama

Deployments in 18 leading markets



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# 1. LTE global picture in MENA: LTE and 5G networks will coexist

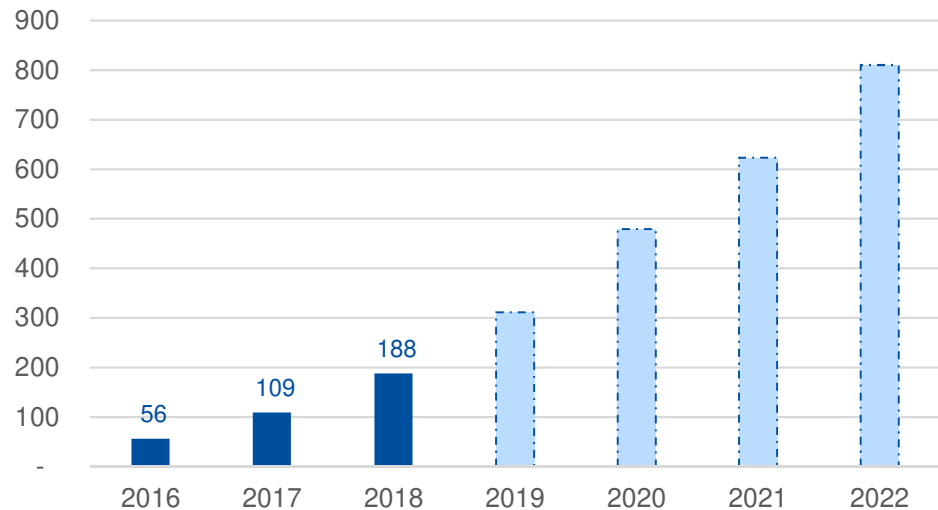
- MENA is a diverse region in terms of mobile market maturity. Major operators in the **GCC** states are looking to be **global leaders in 5G**.
- Major 5G capex will likely come **between 2020 and 2025** as customer adoption increase and demand for enterprises use cases develops.
- LTE networks will **continue to be built**, providing much needed coverage and capacity.
- Most mobile operators in the region are planning non standalone (NSA) network architecture.
- Nevertheless, standalone (SA) architecture will be introduced in some specific areas where traffic is increasing.

## > Important growth of LTE subscriptions in MENA

- About 190 million LTE subscribers as at YE2018.
- + 103% of CAGR\* between 2015 and 2018.
- IDATE DigiWorld estimates that LTE connections will increase significantly by 2022 and reach around **800 million subscriptions in MENA at YE2022**.

\*CAGR: Compound Average Growth Rate

LTE subscriptions and subscriptions estimates in MENA (million SIMs)



Source: IDATE DigiWorld, World LTE Markets - 5G Initiatives & MBB Spectrum, September 2019

## > LTE has spread across the majority of MENA

- The price of LTE handsets has come down again significantly
- Mid-range devices on the market play a crucial role in the mobile democratization process and the access to internet.
- LTE services have been launched in a number of countries in the past year including Syria and Yemen (FWA).
- But, some of the world's remaining LTE "not-spots" can be found in MENA: Djibouti, Mauritania, Palestine, and South Sudan.

## 2. Middle Eastern operators: among the first to announce 5G network deployments

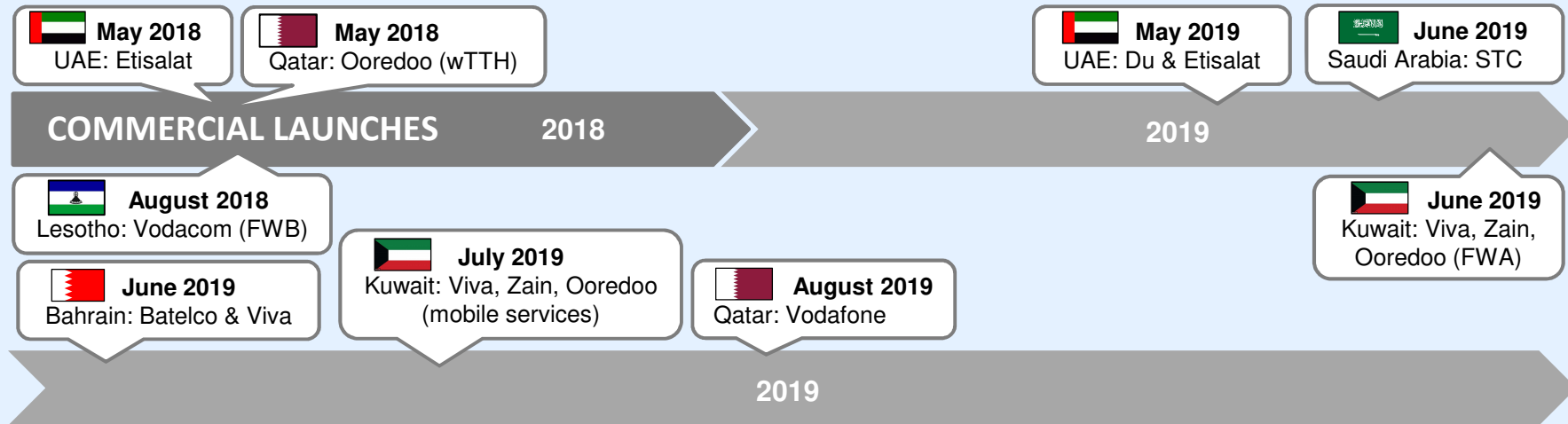
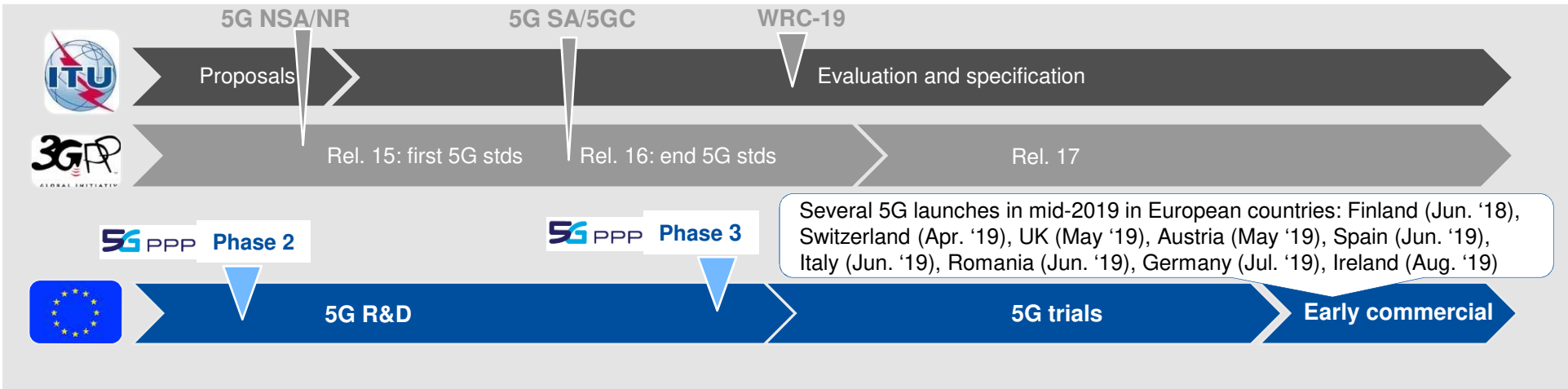


### 5G commercial launches in MENA

	Operator	Launch date	Coverage	Price	Devices	Band
Qatar	Ooredoo (wFTTH)	May, 2018	Doha	n/a	n/a	3.5 GHz
	Vodafone	August 25, 2019	Al Waab, Abu Hamour, Al Azizya, Al Mamoura, Al Rayyan, Umm Salal Muhammed, Khartiyat, Al Hilal, Muntazah, Muraykh and Al Sadd.	Unlimited 300, 20 GB roaming data in 20 countries, QR 250 (62 EUR)/mo, Unlimited 450, 40GB roaming data in 120 countries, QR 400 (100 EUR)/mo, Unlimited VIP 75GB roaming data in 120+ countries, QR 750 (188 EUR)/mo	Huawei Mate 20 X 5G and Xiaomi Mi 5G	3.5 GHz
UAE	Etisalat	May 15, 2018	Abu Dhabi, Dubai, Ajman, Sharjah, Umm Al Quawain, Ras Al-Khaimah, Fujairah, Khor Fakkan, Dibba, Al Ain. 1000 5G base stations in service by end-2019.	n/a	ZTE Axon 10 Pro 5G	3.5 GHz
	DU	June 3, 2019	Abu Dhabi, Dubai, Sharjah, Ras Al-Khaimah, Fujairah, Al Ain. 700 5G base stations by end-2019.	n/a	ZTE Axon 10 Pro 5G	3.5 GHz
Saudi Arabia	STC	June 20, 2019	Riyadh, Sharma, Medina, Taif, Mecca, Jeddah, Abha, Buraydah, Unayzah, Dammam, Al Jubail	5G QuickNet 100 GB at 300 SR (73 EUR)/mo, QuickNet 250 GB at 620 SR (151 EUR)/mo, QuickNet unlimited at 999 SR (241 EUR)/mo	Huawei mate20 x 5G, the Zte axon 10 pro and Huawei 5G Router	3.5 GHz
Bahrain	Batelco	June 5, 2019	Riffa, Saar, Nabih Saleh, Reef Island, Amwaj, Hamala	n/a		n/a
	Viva (FWA)	June 27, 2019	Reef Island, Amwaj Islands, and Riffa	5 BHD (12 EUR) + rental of 5G Home device 12.5 BHD (30 EUR) a month	Xiaomi Mi Mix3 5G	n/a
Kuwait	Viva (FWA & mobile services)	June 2019	Very good coverage in Kuwait City and its suburbs.	100 GB for 35 KD (105 EUR)/mo, 250 GB for 45 KD (135 EUR)/mo		3.5 GHz
	Zain (FWA & mobile services)	June 2019		100GB, 35 KD (105 EUR)/mo, 200GB 45 KD (135 EUR)/mo, 500GB, 55 KD (165 EUR)/mo, 2TB, 75 KD (225 EUR)/mo	5G BOLT device and Viva the Huawei 5G CPE Pro	3.5 GHz
	Ooredoo (FWA & mobile services)	June 2019		280GB, 27 KD (81 EUR)/mo, 500GB, 35 KD (105 EUR)/mo, 1TB, 45 KD (135 EUR)/mo, 2TB, 65 KD (195 EUR)/mo	Huawei 5G Router for free	3.5 GHz

Source: IDATE DigiWorld, 5G markets in MENA, September 2019

# 5. 5G timetables, compared



## 6. 4G and 5G Spectrum issues

### > In the MENA region, LTE is globally using:

- 800/1800 MHz frequencies for LTE-FDD
- 2300 MHz frequencies for LTE-TDD
- 2600 MHz for both LTE-FDD and LTE-TDD

### > 5G licences awarded in five countries since mid-2018

- Regulators made available Spectrum for 5G services in Bahrain, Kuwait, Oman, Qatar, and Saudi Arabia. In UAE the **3.4-3.6 GHz** band was identified as prime 5G band in 2018.
- The C-band is the most awarded band for 5G networks.

### > The C-band is expected to be the most used 5G band at regional level

- There are large blocks available
- **3.5 GHz spectrum** band awarded in, Kuwait, Qatar, (Vodafone and Ooredoo with 100 MHz each), Oman (Omantel and Ooredoo with 100 MHz each), Saudi Arabia, and UAE (Etisalat and Du with 100 MHz each).

- **Egypt:** NTRA is formally considering using 3400–4200 MHz for IMT. In November 2018, a spokesperson for the NTRA indicated he expected spectrum for 5G to be assigned by the start of 2020.
- Morocco and Iraq are also considering using Spectrum in the C-band.

### 5G Spectrum allocations in MENA

	Details	Auction/award date
<b>Bahrain</b>	<b>Assigned:</b> 800 MHz & 2600 MHz	July 2019
<b>Egypt</b>	<b>Considering:</b> 3.4-4.2 GHz	n/a
<b>Iraq</b>	<b>Considering:</b> 3.4-3.6 GHz	n/a
<b>Kuwait</b>	<b>Assigned:</b> 3.5 GHz	May 2019
<b>Morocco</b>	<b>Considering:</b> 3.4-3.6 GHz	n/a
<b>Oman</b>	<b>Assigned:</b> 3.4-3.6 GHz & 3.6-3.8 GHz (reserved for a new entrant).	December 2018
<b>Qatar</b>	<b>Assigned:</b> 3.5-3.8 GHz <b>Considering:</b> 3.4-3.5 GHz & 26.5-27.5 GHz	January 2019
<b>Saudi Arabia</b>	<b>Assigned:</b> 700, 800 & 1800 MHz <b>Assigned:</b> 2300 & 2600 MHz <b>Assigned:</b> 3.5 GHz	2018 January 2019 March 2019
<b>UAE</b>	<b>Assigned:</b> 3.3-3.8 GHz <b>Assigned:</b> 2600 MHz <b>Considering:</b> 1427MHz-1518MHz & 24.5-27.5 GHz	2018 n/a

Source: IDATE DigiWorld, *5G markets in MENA*, September 2019

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