

Oman Telecom MNO - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Oman Telecom MNO Market Analysis

The Oman Telecom MNO Market was valued at USD 2.70 billion in 2025 and estimated to grow from USD 2.86 billion in 2026 to reach USD 3.80 billion by 2031, at a CAGR of 5.88% during the forecast period (2026-2031).

This uptrend is propelled by nationwide 5G rollouts, Oman's emergence as a Gulf submarine-cable hub, and Vision 2040's USD 442 million digital-economy program. Enterprise digitalization, a 134% mobile-penetration rate, and licensing of Starlink for rural back-haul further magnify data traffic. Competition within the three-player oligopoly has sharpened since Vodafone's 2022 launch, raising network-performance benchmarks and service-bundling innovations. Sustained wholesale revenues from more than 20 submarine cables and four terrestrial links provide an added earnings buffer for operators.

Oman Telecom MNO Market Trends and Insights

5G Rollout and Surging Data Traffic

All three operators have launched commercial 5G, lifting down-link speeds to 252.3 Mbps on Omantel's network and pushing consumers toward higher-value plans. Vodafone's Ericsson-built greenfield network achieved a 95% Omanization rate, accelerating skills transfer and localized maintenance. The sunset of 3G networks in 2024 forced subscribers onto 4G and 5G, widening ARPU and opening fixed-wireless-access prospects for logistics hubs in Sohar and Duqm. Enterprise IoT adoption now

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outpaces consumer uptake, with use cases in smart metering and port automation catalyzing incremental revenue. Data-traffic momentum underpins the projected 1.8-percentage-point uplift in overall CAGR.

Vision 2040 Digital-Economy Investments

The Ministry of Transport, Communications, and Information Technology earmarked USD 442 million for digital transformation, spawning AI pilots and national accessibility standards for apps and websites. SEZ developments at Duqm and Sohar require dedicated 5G campus networks, while the government's goal to elevate logistics to global-top-ten status by 2040 deepens infrastructure demand. The country's ICT sector is valued at USD 5.47 billion in 2025 and is projected to almost double by 2029, reinforcing the +1.2% CAGR impact.

12% Royalty on Telecom Revenues

A uniform 12% levy on gross telecom income caps reinvestment potential and constrains price flexibility. The burden, higher than neighboring GCC norms, forces cost-rationalization measures such as Omantel's migration of 200 products to a cloud-native charging platform. Vodafone's asset-light model and Ooredoo's operational-efficiency drive partly offset the margin squeeze, yet the royalty still shaves 1.4 percentage points off projected CAGR.

Other drivers and restraints analyzed in the detailed report include:

Rising Smartphone and Internet Penetration Oman as Gulf Submarine-Cable Hub OTT Revenue Leakage to Foreign Platforms

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Data and internet services held 50.12% of the Oman telecom MNO market share in 2025, anchoring top-line performance as enterprises shift workloads to cloud platforms. Voice still contributes materially but declines annually, while messaging yields continue to contract under OTT pressure. The Oman telecom MNO market size attributed to IoT and M2M services is projected to grow at a 5.99% CAGR through 2031, propelled by smart-city deployments in Muscat and Duqm and automated-meter-reading rollouts for water utilities. Operators monetize these connections via managed-services contracts and edge-computing bundles.

Fixed-wireless-access offerings deliver fiber-like speeds in challenging terrain, augmenting data revenue and reinforcing the centrality of 5G. OTT and PayTV streams add modest upside as local content partnerships mature, whereas roaming and enterprise-solutions lines benefit from Oman's status as a logistics and tourism hub. TRA's certification requirements for IoT reliability support premium pricing and keep churn low, further stabilizing data-service cash flows.

The Oman Telecom MNO Market is Segmented by Service Type (Voice Services, Data and Internet Services, Messaging Services, IoT and M2M Services, OTT and PayTV Services, and Other Services), and End User (Enterprises, Consumer). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Subscribers).

List of Companies Covered in this Report:

Oman Telecommunications Company (Omantel) Omani Qatari Telecommunications Company (Ooredoo) Vodafone Oman

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The market estimate (ME) sheet in Excel format
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