

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

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Report description:

Saudi Arabia Telecom MNO Market Analysis

The Saudi Arabia Telecom MNO Market was valued at USD 26.97 billion in 2025 and estimated to grow from USD 28.74 billion in 2026 to reach USD 39.51 billion by 2031, at a CAGR of 6.57% during the forecast period (2026-2031).

Network investments supporting 78% 5G population coverage and average mobile download speeds of 322 Mbps continue to elevate user expectations, while Vision 2030 policies position telecom services as a cross-sector enabler. New spectrum allocations in the 600 MHz, 700 MHz, and 3800 MHz bands are lowering per-bit costs and unlocking rural coverage gains. Data-driven revenue opportunities are expanding as smartphone penetration exceeds 95%, and the push toward private 5G networks sets a new growth frontier within industrial zones. At the same time, near-saturated subscriber penetration compels operators to prioritize average-revenue-per-user uplift through premium connectivity and digital-service bundles.

Saudi Arabia Telecom MNO Market Trends and Insights

Vision 2030 digital-government and smart-city initiatives

Large-scale e-government programs mandate ultra-reliable connectivity for real-time citizen services. The Ministry of Communications and Information Technology's 2023 strategy aims to lift national ICT output by 50%, creating sizable enterprise contracts for operators. NEOM's 5G-based cognitive-city blueprint further elevates demand for network slicing and edge

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computing. These projects recast the Saudi Arabia telecom MNO market as a value-added infrastructure partner rather than a commodity bandwidth provider, enabling higher ARPU through managed solutions.

Nationwide 5G roll-out and new mid-band spectrum auctions

Spectrum auctions boosting licensed frequencies by 27% are accelerating 5G densification and lowering capacity costs. STC's 5G footprint now spans more than 22,000 towers, and Huawei's SuperLink initiative extends coverage to remote districts. Rising data consumption, up 19% year over year, requires efficient mid-band assets, reinforcing network investment while supporting emerging fixed-wireless-access uptake.

Near-saturated subscriber base limits organic growth

Mobile connections surpass 116% of the population, making incremental additions a zero-sum fight. stc posted a 5.2% profit decline in Q1 2024 despite higher revenue, illustrating margin compression in mature markets. Operators now focus on upselling premium services rather than chasing new lines, but competitive price promotions keep ARPU uplift modest.

Other drivers and restraints analyzed in the detailed report include:

Industrial private-5G pilots in NEOM and manufacturing zones
Fintech boom driving secure IoT-ready connectivity bundles
OTT substitution eroding legacy voice/SMS revenue

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

Segment Analysis

Data and internet services commanded 50.88% of the Saudi Arabia telecom MNO market in 2025, supported by over 32 million mobile internet users and 93% penetration. The Saudi Arabia telecom MNO market size attached to data services is projected to maintain mid-single-digit growth as 5G drives higher usage rates. IoT and M2M lines, though smaller in absolute revenue, are forecast to expand at a 6.67% CAGR, helped by industrial automation and smart-city setups. Voice remains relevant for enterprise calling and inbound roaming, yet younger segments rely predominantly on OTT channels. Messaging's contribution continues to shrink as multimedia substitutes gain popularity, motivating operators to bundle Rich Communication Services with 5G plans.

Operator strategies emphasize differentiated content and cloud-edge features to lift data ARPU. stc's enterprise-grade IoT platform connects oil-and-gas sensors to centralized analytics, illustrating premium pricing potential. Meanwhile, Mobily's focus on fixed-wireless access has captured subscribers needing fiber-like speeds without civil works. OTT and PayTV services benefit from stc tv content tie-ups, while regulatory caps on international video apps constrain outside competition, indirectly supporting local offerings.

The Saudi Arabia 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:

stc (Saudi Telecom Company) Mobily (Etihad Etisalat) Zain KSA

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The market estimate (ME) sheet in Excel format
3 months of analyst support

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