

Tarifica Study Finds Wide Disparities in GCC Mobile Prices, Both Across and Within Countries, with Kuwait Emerging as Most Affordable



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Across the GCC, operator pricing strategies drive major differences in consumer mobile costs.

A new study by global telecom data provider [Tarifica](#) finds that Kuwait has the lowest mobile costs across the Gulf Cooperation Council (GCC) in Q3 2025, offering consumers significantly more affordable service than their regional peers.

Across the four user profiles analyzed, Kuwait's average monthly price is just \$31.10, about half of the cost in the next most affordable market, Bahrain. At the other end of the spectrum, the United Arab Emirates and Qatar are the most expensive, with average monthly prices of \$107.15 and \$115.53, respectively.



"Kuwait's performance across all four consumer profiles underscores how its operators are encouraging digital adoption by keeping costs accessible," said Will Watts, Vice President of Product at Tarifica. "For heavy data users especially, Kuwait stands out in the region as a market where affordability and access go hand in hand."

Diverging Pricing Strategies

The analysis, which examines plans requiring 5GB, 20GB, 50GB, and 100GB of monthly data (each paired with 100 minutes of calling), reveals that pricing disparities are most pronounced at higher usage levels. For the lowest usage profile, Kuwait's monthly cost is 43 percent of that in the UAE, the most expensive market at this level. By contrast, for the highest usage profile, Kuwait's price is barely 21 percent of that in Qatar, the most expensive market overall.

These differences are the result of diverging operator strategies around volume discounting. In Kuwait, operators cut the price per GB substantially as included data volumes rise. On the other hand, operators in the UAE and Qatar price plans more linearly, with costs scaling in step with demand. This pricing approach pushes Qatar from being one of the cheapest markets for low usage consumers to the most expensive for heavy data users.

Competition Within Countries

The study also reveals significant variation in competitive dynamics within GCC markets. In Kuwait and Qatar, operators price their offerings almost identically, signaling little differentiation between providers. In Kuwait, for example, all three operators are priced identically across every profile.

Conversely, Oman shows dramatic price spreads. For a 5GB/100-minute plan, Vodafone charges \$20.53 per month while Omantel prices the same profile at \$35.92. This wide spread suggests that Omani operators are positioning themselves differently on value and service, in contrast with the more commoditized markets in Kuwait and Qatar.

Implications for Affordability and Competition

Will Watts emphasized two important themes in the findings: affordability for high usage consumers and the state of competition across the region. “In markets like Kuwait, operators’ willingness to reduce per GB costs at higher data volumes is a clear signal of support for digital growth. Meanwhile, in markets such as Kuwait and Qatar, the lack of price variation points to a limited degree of brand differentiation, which could be an area of concern for regulators,” he added.

The full analysis is drawn from Tarifica’s Q3 2025 update of its Telecom Pricing Intelligence Platform (TPIP), which tracks mobile offers and pricing worldwide.

