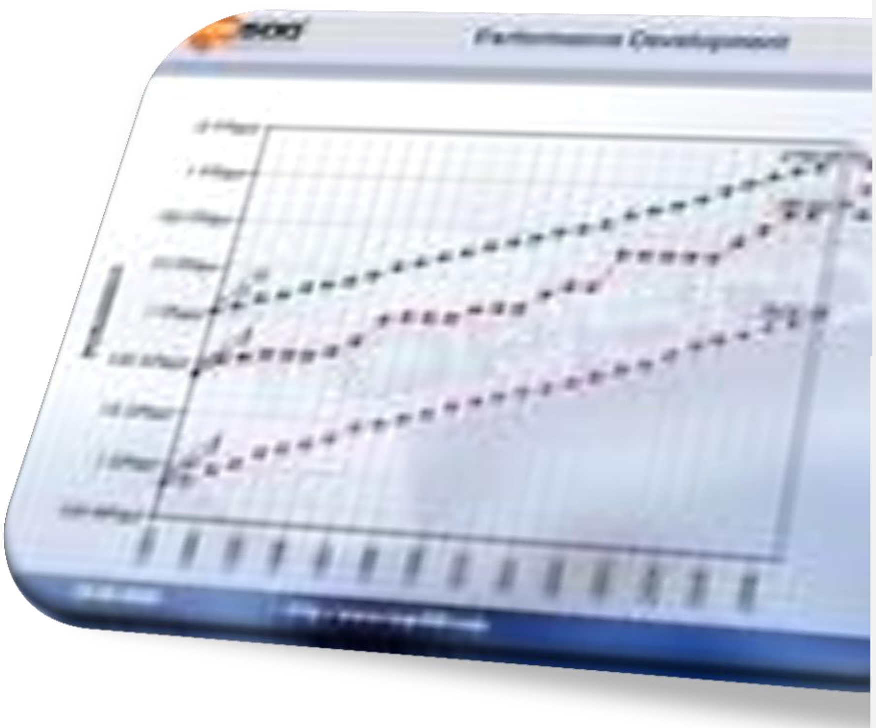
هيئة تنظيم الاتصالات

Telecommunications Regulatory Authority

Telecom Market Statistics Report: Q1, 2009



Market Research & Planning

Issued: 17/ 05/ 2009

INTRODUCTION

1. *This report provides a brief update on the trends for the selected telecom services in the Sultanate of Oman for the First Quarter, March 2009, The report includes the performance of fixed, mobile and internet services only.*

2. *This report has been compiled based on the information received from three telecom operators: Omantel, Oman Mobile and Nawras. TRA collects data from these operators on monthly and quarterly bases and compile and dissemination it for information of general public.*

3. *This quarterly report is available on TRA website (www.tra.gov.om). Any suggestions pertaining to this report may please be addressed to saleem@tra.gov.om.*

4. *Disclaimer*

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Telecom Sector Indicators at Glance:			
Type of Service	***As on March 2009***	***As on December 2008***	***% Change***
Total Main Telephone Lines in Operation; (1+2+3)	***276,748***	***274,178***	***0.9%***
1. Main Lines in Operation: Post Paid	*220,152*	*220,169*	***-0.01%***
2. Main Lines in Operation: Prepaid (Sahl)	*49,856*	*47,306*	***5.4%***
3. Public Telephone – Payphones	*6,740*	*6,703*	***0.6%***
Fixed Line Penetration*	***10.1%***	*10%*	***1.0%***
Total Mobile Subscribers; (1+2)	***3,355,145***	***3,219,349***	***4.2%***
1. Mobile Postpaid Subscribers	***333,682***	*324,812*	***2.7%***
2. Mobile Prepaid Subscriber	***3,021,464***	*2,894,537*	***4.4%***
Mobile Penetration*	***122%***	***117.4***	***4.3%***
Total Internet Subscribers: (1+2)	***83,658***	***80,167***	***4.4%***
1. Internet Subscribers (Dial-up): (1.1-1.4)	***83,291***	***79,819***	***4.3%***
1.1 Post Paid	*25,551*	*26,702*	***-4.3%***
1.2 Pre paid	*21,388*	*20,708*	***3.3%***
1.3 Log & Surf	*938*	*774*	***21.2%***
1.4 (ADSL)	*35,414*	*31,635*	***11.9%***
2. Broadband Internet Subscribers (leased Line)	***367***	***348***	***5.5%***
Internet Penetration*	***3%***	***2.9%***	***3.4%***

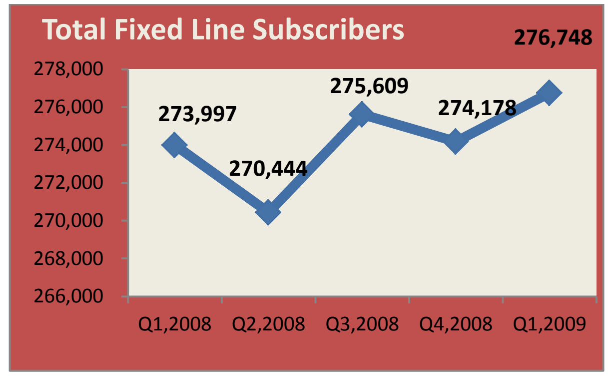
***** Penetration rates based on the latest published population by MONE: (2,743,000. by May 2008, before that it was (2,577,000).***

Fixed Line Services

Fixed Line Subscribers:

During the first quarter of year 2009, fixed line subscribers reached at 276,748 lines with an addition of 2,570 lines (0.9% increase) as compared to the previous quarter.

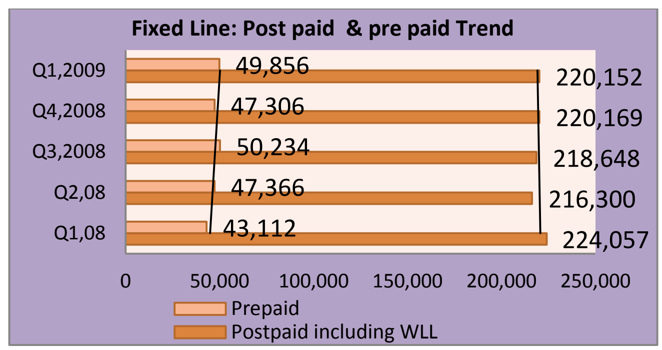
Figure.1: Total Fixed line Trend



Fixed Line: Post paid & Prepaid Subscribers

Post paid fixed line subscribers decreased by 17 lines during the first quarter of year 2009 and reached at 220, 152 as compared to 220,169 in December 2008. The pre paid subscribers increased by 5.4% with a total of 49,856 during the same period.

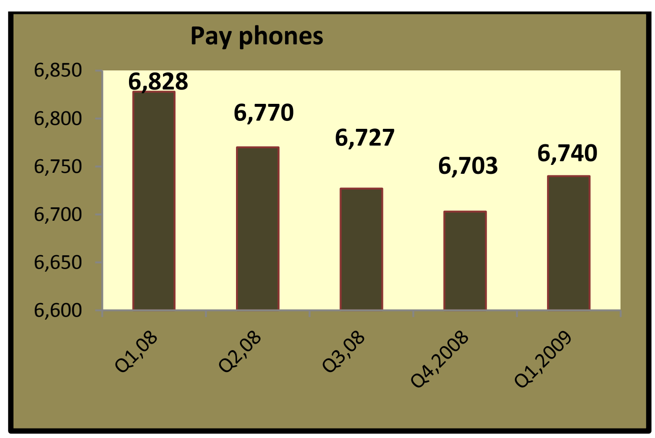
Figure.2: Fixed line Post paid & Pre paid Subscribers



Pay Phones

There were 37 new public pay phones added during the first quarter of year 2009, with a total of 6,740 over the fourth quarter of year 2008 scoring 0.5% growth.

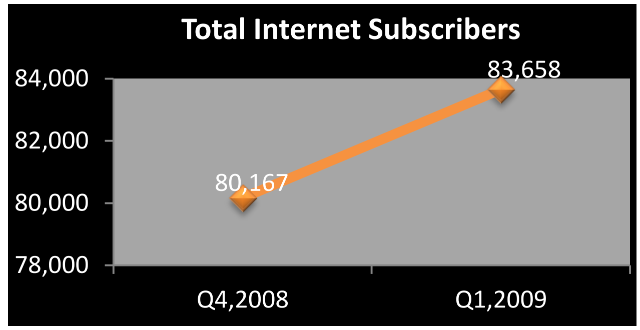
Figure.3: Public Payphones Trend



Internet Services:

Total internet subscribers include dial up (post paid, pre paid, log and surf, and ADSL as all ADSL have the feature of dial up), in addition to the leased line. Total internet subscribers reached at 83,658 by end March 2009, 4.3% more than the previous quarter ended by 31st December 2008.

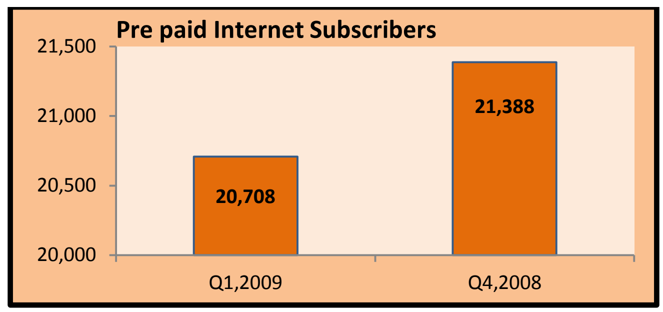
Figure.4: Internet Subscribers



Internet Pre paid Subscribers:

The estimated internet prepaid subscribers registered 3.3% growth by end of March 2009 with a total of 21,388 subscribers as compared to end of December 2008.

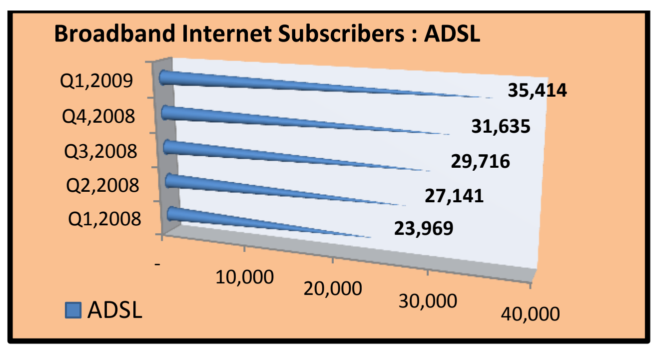
Figure.5 Prepaid Internet Subscribers



ADSL Subscribers

ADSL subscribers increased by 12% in the first quarter of year 2009 with a total of 35,414 subscribers as compared to the fourth quarter of 2008.

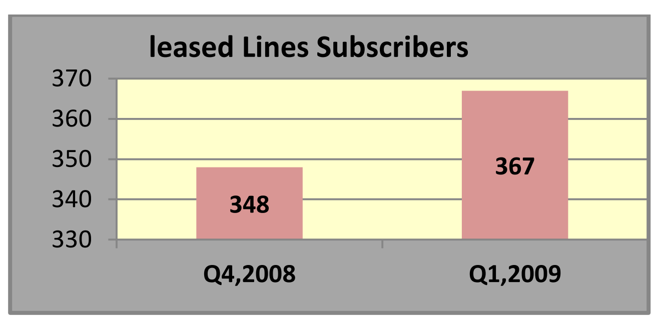
Figure.6: ADSL Subscribers



Internet leased Lines:

Internet leased line subscribers increased from 348 to 367with a growth of 5% during the reported quarter as compared to the previous quarter.

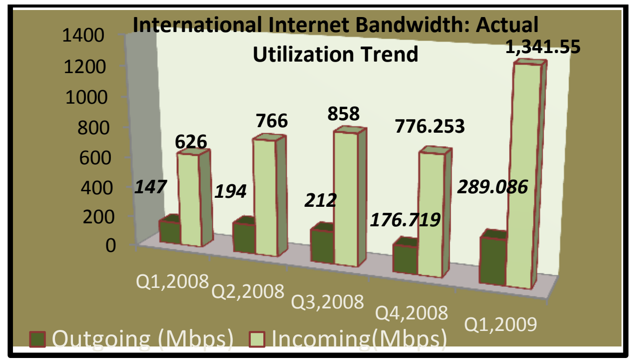
Figure.7: leased Lines Trend



International Internet Bandwidth

As on 31st March 2009, actual utilization of international internet bandwidth was increased by 63.5% for the outgoing and 73% for the incoming traffic as compared to the fourth quarter 2008.

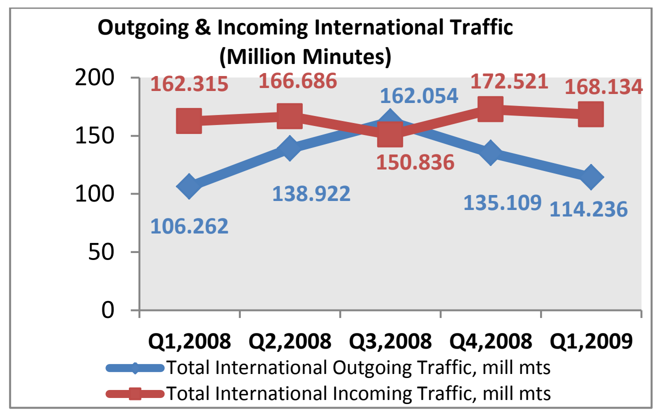
Figure.8: International Internet Bandwidth



International Traffic

International outgoing and incoming traffic have registered decline of 15.4% 2.5% and respectively in the quarter ending March 2009 as compared to the quarter ending December 2008.

Figure.9: Outgoing & Incoming International Traffic



ARPU of Fixed Lines Services

ARPU for Fixed Line services (Post paid, Prepaid, Payphones and Internet is depicted in the diagrams given below:

Figure.10 ARPU/Month for Post paid

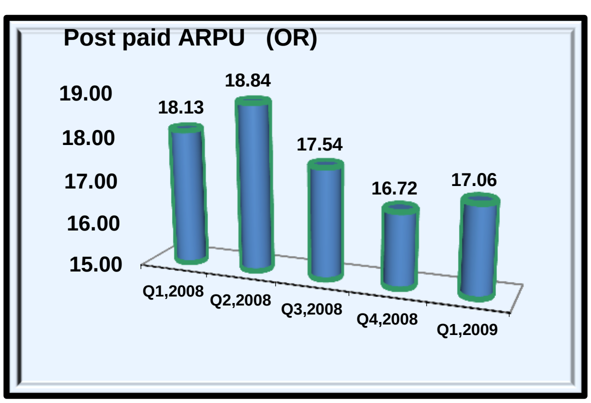


Figure.11: ARPU/Month for Pre paid

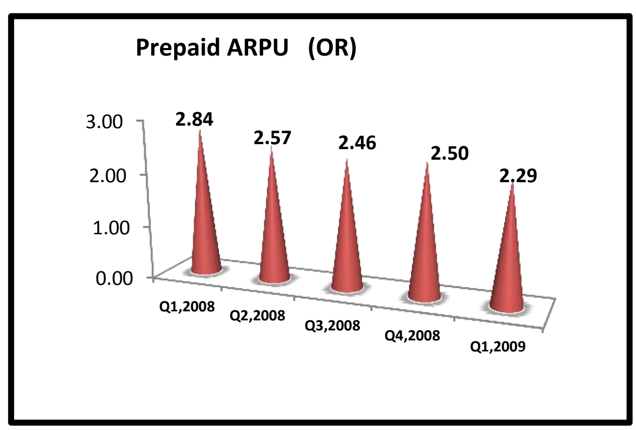
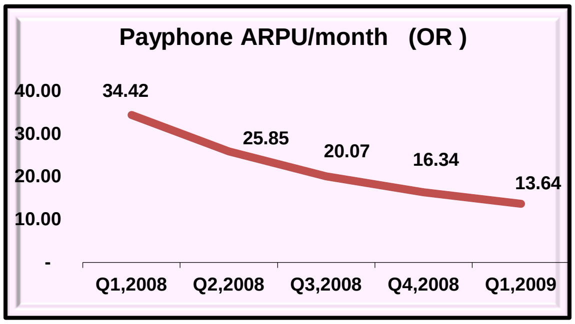
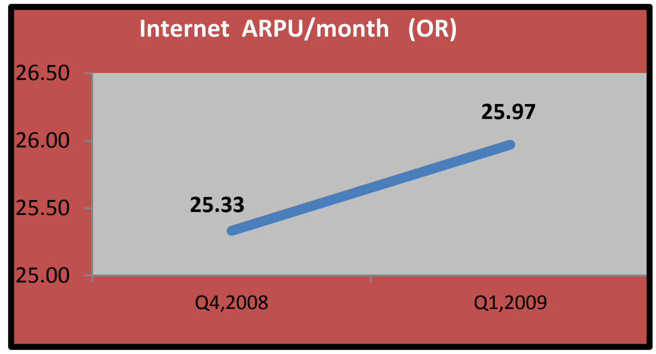


Figure.12: ARPU/Month for Payphone



ARPU of Internet

Figure.13: Internet ARPU/Month for Internet

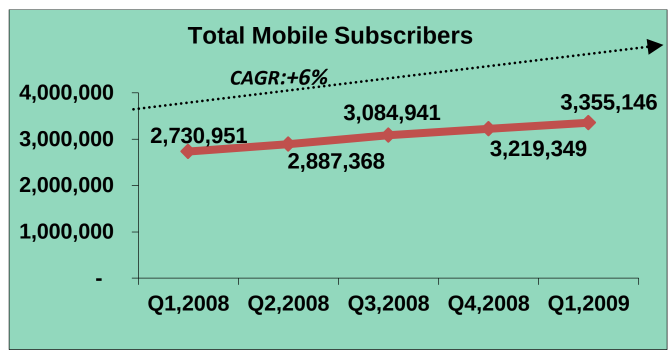


Mobile Services

Mobile Subscribers

By end of March 2009, total mobile subscribers increased by 4.2% showing total of 3,355,146 subscribers. Figure.14 shows subscriber's trend during last four quarters.

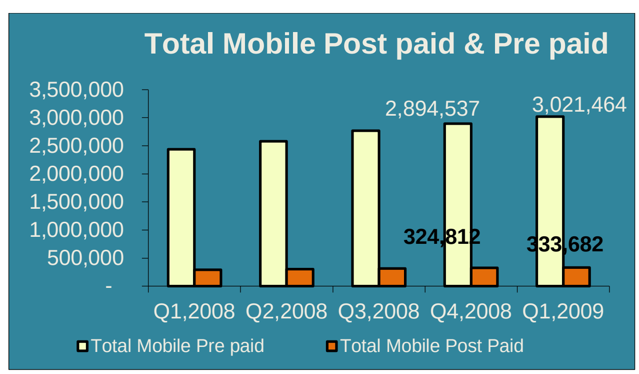
Figure.14: Total Mobile Subscribers



Growth of Prepaid and Postpaid Subscribers

Mobile pre paid subscribers increased by 4.4% (3,021,464) during the period (January- March) 2009 as compared to the (October - December) 2008. The post paid also grew by 2.7% (333,682) during the same period.

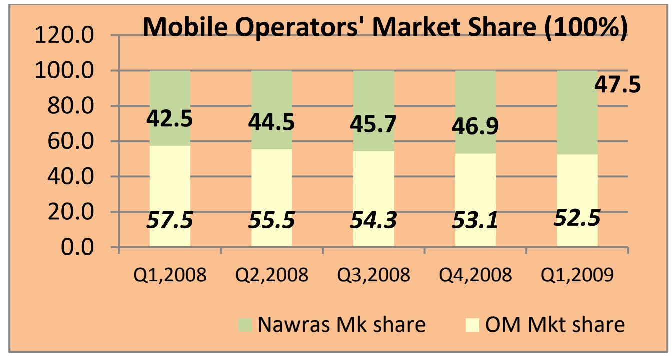
Figure.15: Mobile Post paid and Pre paid Subscribers



Mobile Market Share

Figure.16 shows the trend of the Oman mobile and Nawras market share for last four quarters. By end of March 2009, Oman mobile share reached at 52.5% while Nawras has 47.5% market share.

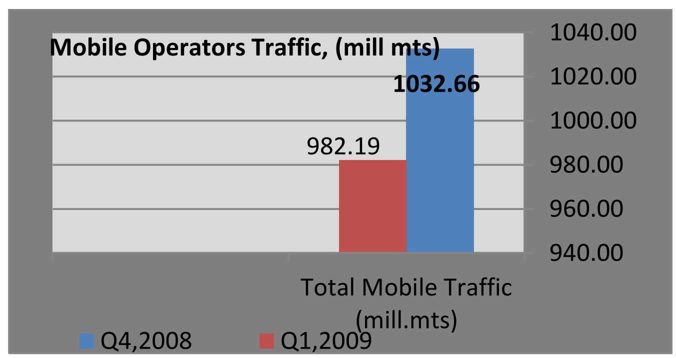
Figure .16: Mobile Operators' Market Share



Mobile Traffic

A reduction of 5% was recorded in total mobile traffic which stood at 982.19 million minutes in the first quarter 2009 against 1,032.66 million minutes in the fourth quarter 2008. Figure.17 shows the trend of total mobile traffic over the previous quarters.

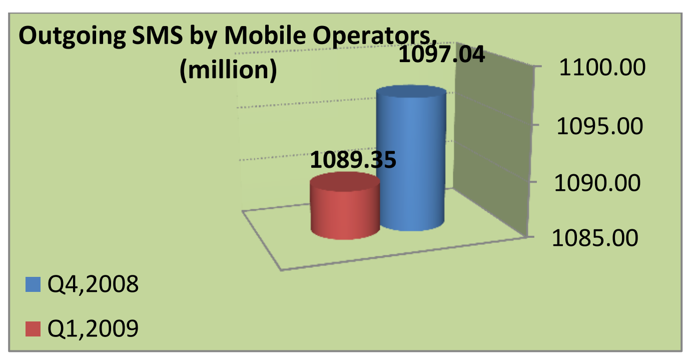
Figure .17: Mobile Traffic



SMS

There was 0.7% decrease in the total number of SMS sent by subscribers of both mobile operators over the previous quarter. Similarly, the number of MMS sent declined by 8% during the same period.

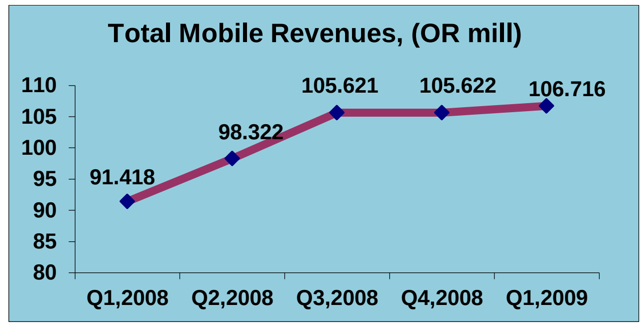
Figure .18: Mobile SMS



Mobile Services Revenue

Total mobile revenue increased from RO 105.622 million to OR 106.716 million during the first quarter 2009 with 1.03% growth.

Figure.19: Mobile Revenue Trend



Average Revenue per User per Month (ARPU) for Mobile Services

The average revenue per user per month (ARPU) for mobile sector was RO 10.60 in the first quarter 2009 as against RO 10.94 in the fourth quarter 2008. The Figure.20 depicts the trend of mobile ARPU/month for last four quarters.

Figure.20: Mobile Services ARPU/Month