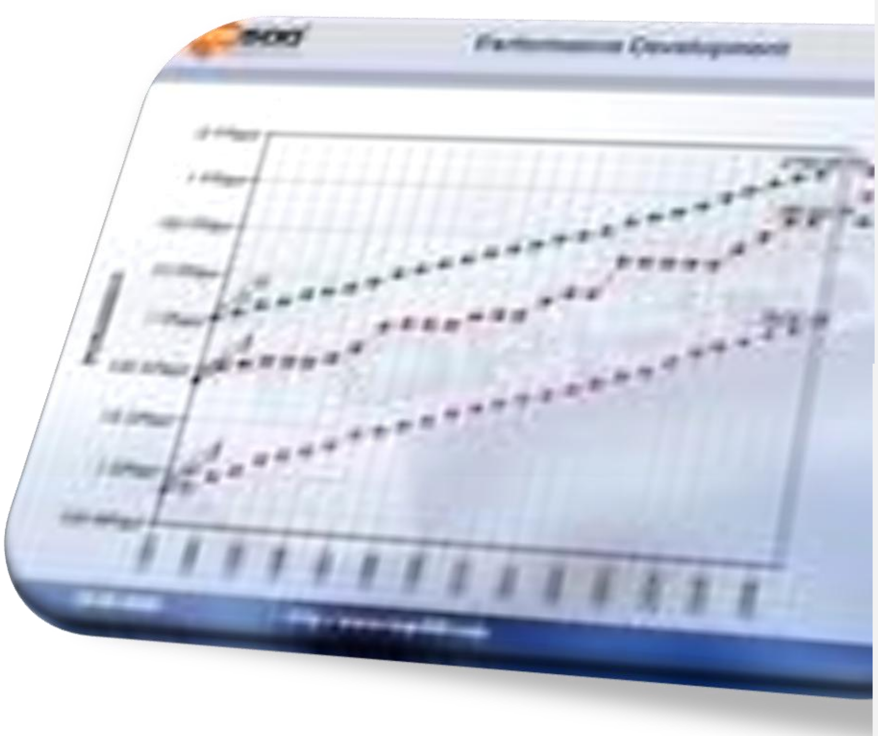
هيئة تنظيم الاتصالات
Telecommunications Regulatory Authority

Telecom Market Statistics Report: Q2, 2009



Market Research & Planning

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INTRODUCTION

1. ***This report provides a brief update on the trends for the selected telecom services in the Sultanate of Oman for the Second Quarter of 2009, The report covers 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).***

4. ***Disclaimer***

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Telecom Sector Indicators at Glance:			
Type of Service	***As on June 2009***	***As on March 2009***	***% Change***
Total Main Telephone Lines in Operation; (1+2+3)	***271,764***	***276,748***	***-1.8%***
1. Main Lines in Operation: Post Paid	*216,497*	*220,152*	***-1.7%***
2. Main Lines in Operation: Prepaid (Sahl)	*48,539*	*49,856*	***-2.6%***
3. Public Telephone – Payphones	*6,728*	*6,740*	***-0.2%***
Fixed Line Penetration*	***9.9%***	***10.1%***	***-2.0%***
Total Mobile Subscribers; (1+2)	***3,562,565***	***3,355,145***	***6.2%***
1. Mobile Postpaid Subscribers	***337,926***	***333,682***	***1.3%***
2. Mobile Prepaid Subscriber	***3,224,639***	***3,021,464***	***6.7%***
Mobile Penetration*	***130%***	***122%***	***6.6%***
Total Internet Subscribers: (1+2)	***76,340***	***83,658***	***-8.7%***
1. Internet Subscribers (Dial-up): (1.1-1.4)	***75,961***	***83,291***	***-8.8%***
1.1 Post Paid	*23,875*	*25,551*	***-6.6%***
*1.2 Pre paid***	*14,221*	*21,388*	***-33.5%***
1.3 Log & Surf	*780*	*938*	***-16.8%***
1.4 (ADSL)	*37,085*	*35,414*	***4.7%***
2. Broadband Internet Subscribers (leased Line)	***379***	***367***	***3.3%***
Internet Penetration*	***2.8%***	***3%***	***-6.7%***

***** Penetration rates based on the latest published population by MONE: 2,743,000.***

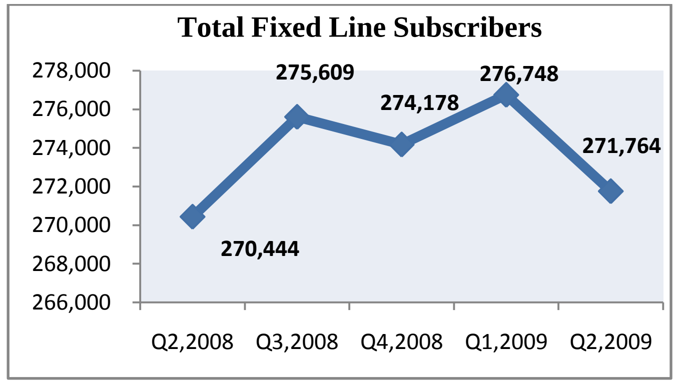
****** Prepaid subscribers are calculated on the bases of average dial up usage***

Fixed Line Services

Fixed Line Subscribers:

During the second quarter of year 2009, total fixed line registered a reduction of 2% with 271,764 lines as compared to 276,748 lines in the first quarter of 2009.

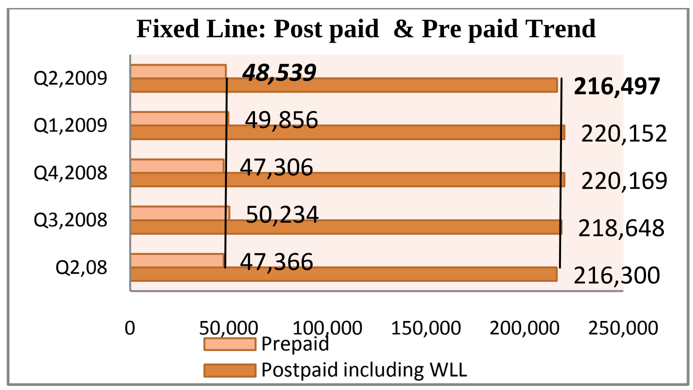
Figure.1: Total Fixed line Trend



Fixed Line: Post paid & Prepaid Subscribers

Both post paid and pre paid fixed line subscribers went down during the second quarter of the year as compared to the first quarter by 1.7% and 2.6% respectively.

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



Pay Phones

Total number of public pay phones has been decreased by 0.2 % during the second quarter of year 2009 as compared to the first quarter and they reached at 6,728 payphones.

Figure.3: Public Payphones Trend

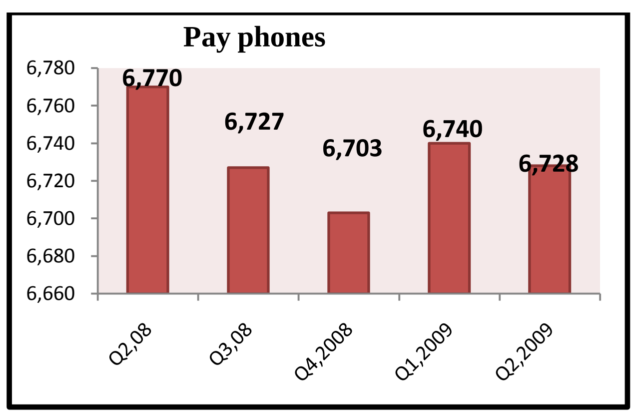
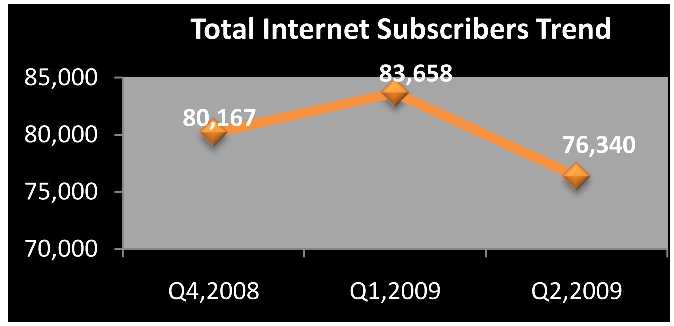


Figure.4: Internet Subscribers

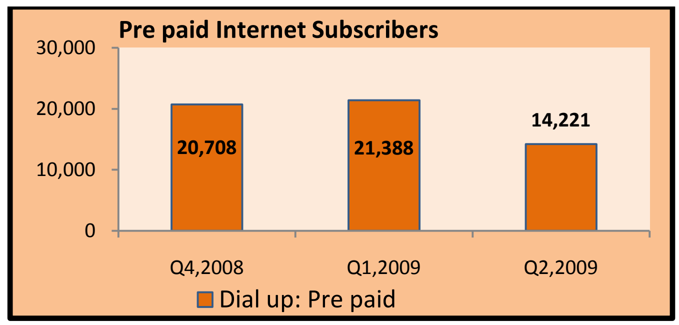
Internet Services:



By end of the second quarter 2009, total internet subscribers reached at 76,340 subscribers registering a reduction of 8.7% from the previous quarter.

Figure.5 Prepaid Internet Subscribers

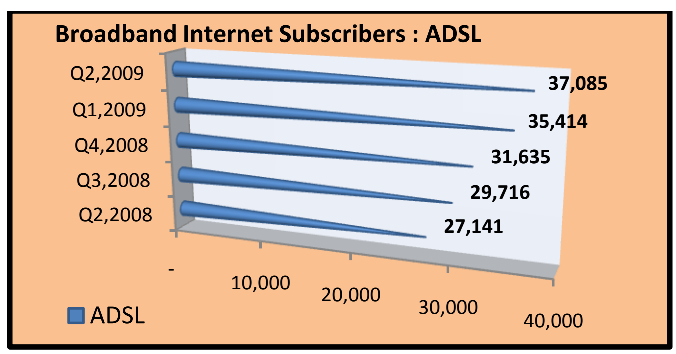
Internet Pre paid Subscribers:



Estimated internet prepaid subscribers shrunk by 33.5% during the second quarter 2009, ending with a total of 14,221subscribers as compared to 21,388 by end of March 2009. This reduction was due to the decline in the sales of pre paid cards.

Figure.6: ADSL Subscribers

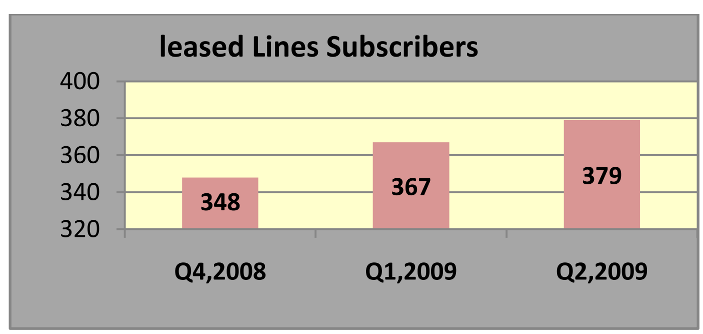
ADSL Subscribers



ADSL subscribers grew by 4.7% by June 2009 with a total reaching to 37,085 subscribers as compared to March 2009.

Figure.7: leased Lines Trend

Internet leased Lines:

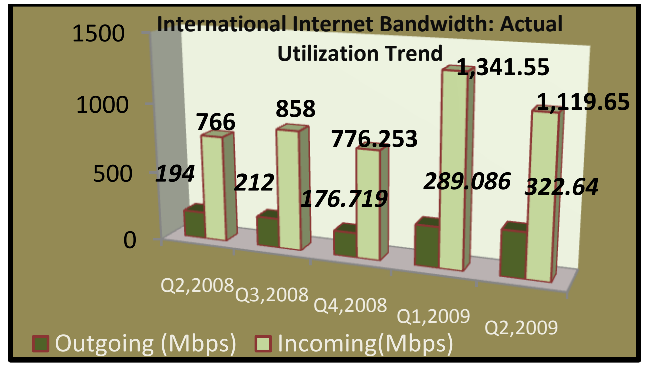


Internet leased lines subscribers added another 12 subscribers with a growth rate of 3.3% during the reported quarter as compared to the previous quarter.

International Internet Bandwidth

The actual utilization of outgoing international internet bandwidth has been increased from 289.086 Mbps in Q1 to 322.64 Mbps in Q2 of the year 2009. Incoming international internet bandwidth was fluctuating over the last quarters as it is shown in figure.8.

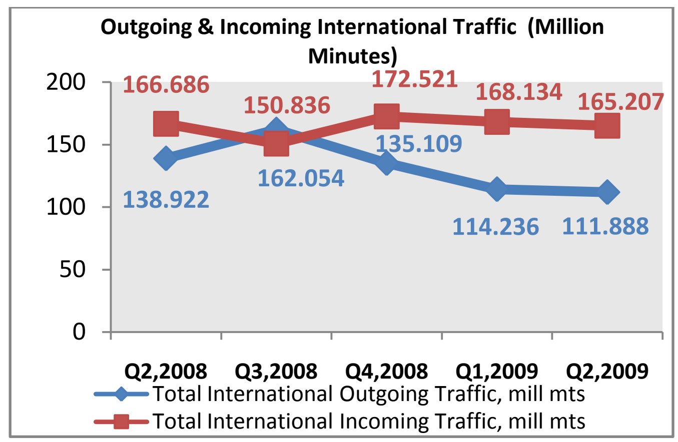
Figure.8: International Internet Bandwidth



International Traffic

Both total international outgoing and incoming traffic decreased by 2%and 1.7% respectively as compared to the previous quarter.

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

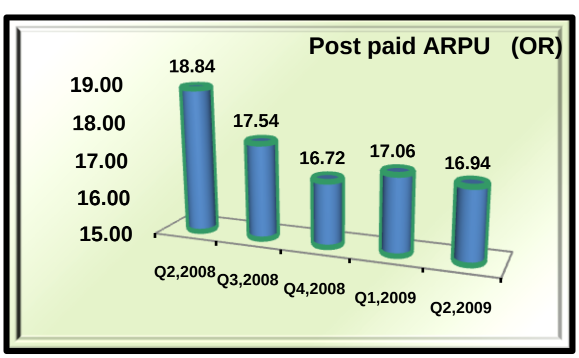
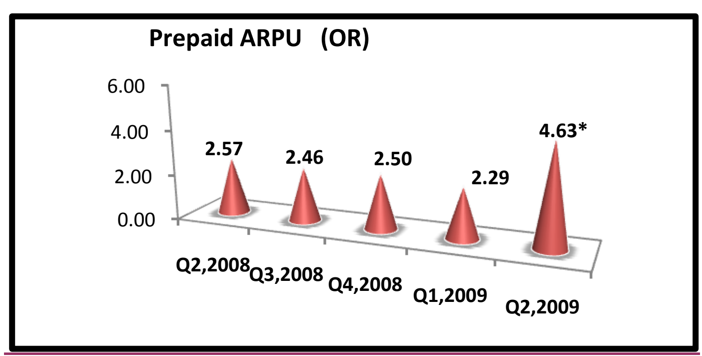
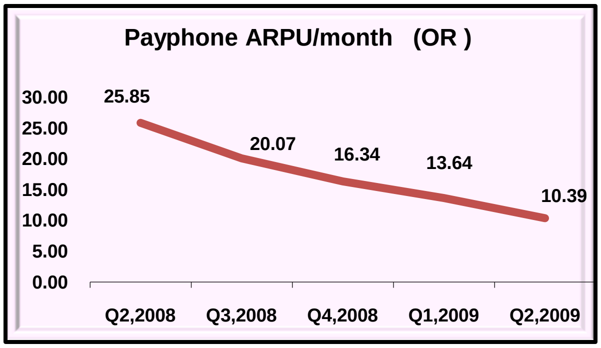


Figure.11: ARPU/Month for Pre paid



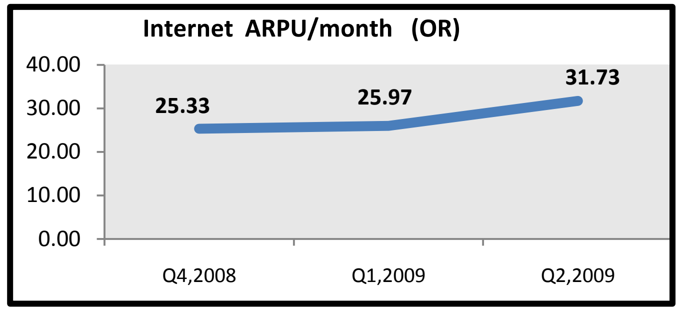
****As the rent of fixed line pre paid service increased from OR2.000 to OR4.000 , therefore , ARPU has been increased from OR 2.290 to OR 4.630.***

Figure.12: ARPU/Month for Payphone



ARPU of Internet

Figure.13: Internet ARPU/Month for Internet

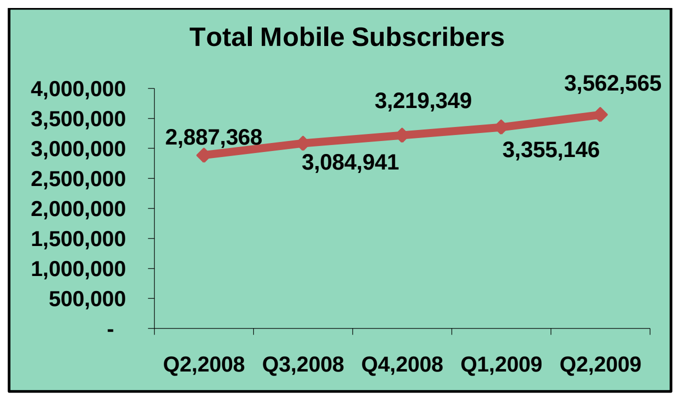


Mobile Services

Mobile Subscribers

With an increase of 6.2%, the total mobile subscribers reached 3,562,565 by end of the second quarter 2009 as compared to 3,355,146 in the first quarter of the year. The second quarter figure includes 93,310 subscribers added by mobile resellers.

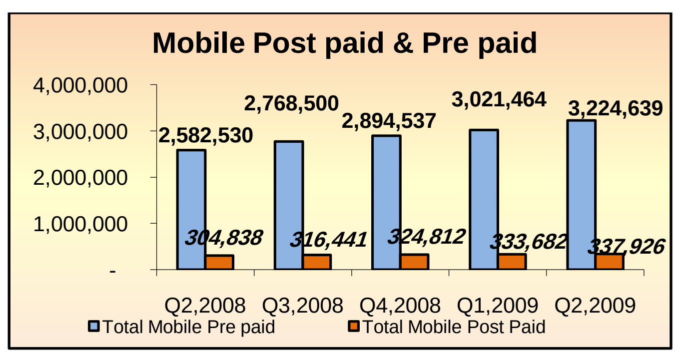
Figure.14: Total Mobile Subscribers



Mobile Postpaid & Pre paid Subscribers

Mobile pre paid subscribers increased by 6.7% from 3,021,464 in Q1 to 3,224,639 in Q2, 2009. The post paid also grew by 1.3% during the same period under comparison.

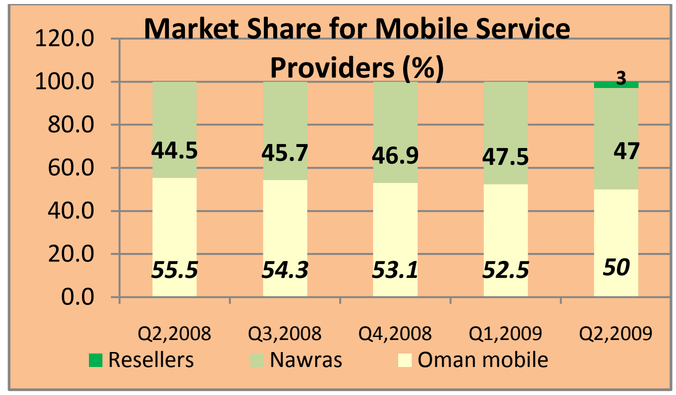
Figure.15: Mobile Post paid and Pre paid Subscribers



Mobile Market Share

Figure.16 shows the trend of the Oman mobile and Nawras market share for last four quarters. By end of June 2009, Oman mobile share reached at 50% while Nawras has 47%. The 3% balance is represented by mobile resellers (Rennah and Friendy).

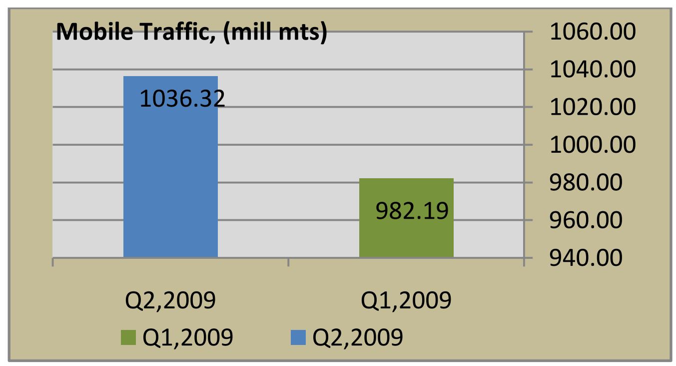
Figure .16: Mobile Operators' Market Share



Mobile Traffic

An increased of 5.5% was recorded in total mobile traffic which stood at 1,036 million minutes in the second quarter 2009 as against 982 million minutes in the previous quarter.

Figure .17: Mobile Traffic

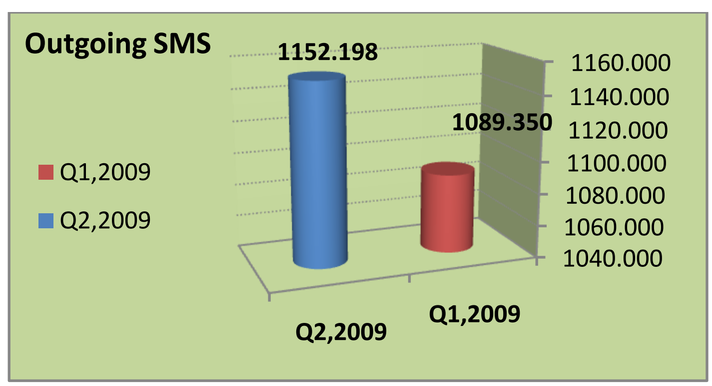


SMS

Total SMS sent by mobile subscribers grew by 5.8% by end June 2009 over March 2009.

Number of outgoing MMS almost stayed at the same level by June 2009 with a total of 6.902 million.

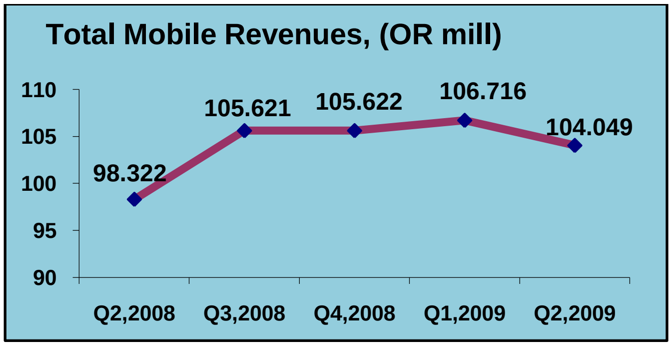
Figure .18: Mobile SMS



Mobile Services Revenue

Mobile sector revenue experienced decline during the second quarter 2009 as compared to the previous quarters. Total mobile revenue decreased by 2.5% from OR 106.716 million to RO 104.049 million.

Figure.19: Mobile Revenue Trend



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

Due to reduction in the mobile sectors' revenue, average revenue per user per month (ARPU) gets reduced as well. As compared to March 2009, mobile ARPU for June 2009 declined by 7.1% from 10.60 RO to 9.85 RO.

Figure.20: Mobile Services ARPU/Month