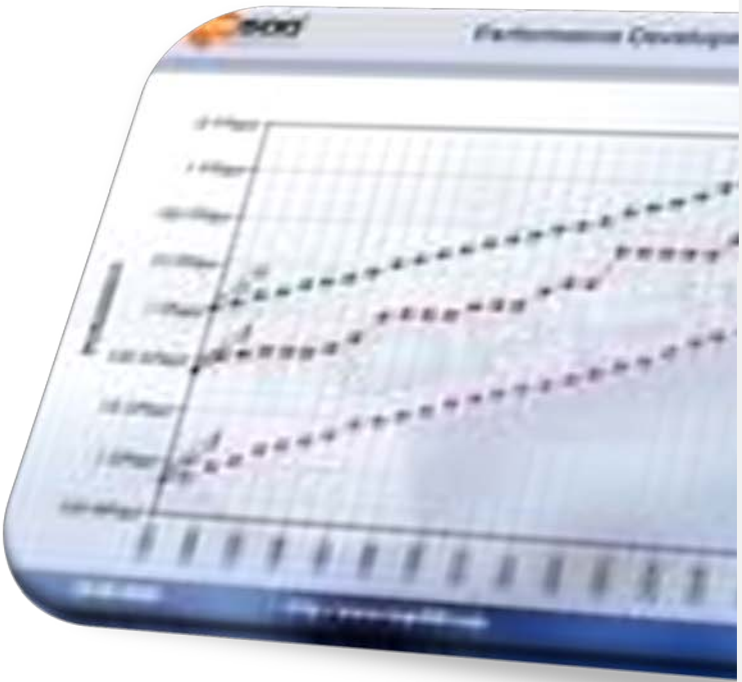
هيئة تنظيم الاتصالات
Telecommunications Regulatory Authority

Telecom Market Statistics Report: Q3, 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 3rd Quarter 2009. The report covers the performance of fixed, mobile and internet services.***

2. ***This report has been compiled based on the information received from the three telecom operators and two resellers: Omantel, Oman Mobile, Nawras, Friendi Mobile, and Renna. TRA collects data from these operators and resellers on monthly and quarterly bases, compile, and disseminate 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 Sep 2009**	***As on Jun 2009***	***% Change***
Total Main Fixed Telephone Lines in Operation; (1+2+3)	***270,167***	***271,764***	***-0.6%***
1. Main Fixed Lines in Operation: Post Paid	*215,030*	*216,497*	*-0.7%*
2. Main Fixed Lines in Operation: Prepaid (Sahl)	*48,332*	*48,539*	*-0.4%*
3. Public Telephone – Payphones	*6,805*	*6,728*	*1.1%*
Fixed Line Penetration*	*9.4%*	***9.5%***	***-1.1%***
Total Mobile Subscribers; (1+2)	***3,778,937***	***3,562,565***	***6.1%***
1. Mobile Postpaid Subscribers	***347,626***	***337,926***	*2.9%*
2. Mobile Prepaid Subscriber	***3,431,311***	***3,224,639***	*6.4%*
Mobile Penetration*	**132%**	***124 %***	***6.5%***
Total Internet Subscribers: (1+2)	***74,759***	***76,340***	***-2.1%***
1. Internet Subscribers (Dial-up): (1.1-1.4)	***74,368***	***75,961***	***-2.1%***
1.1 Post Paid	*21,178*	*23,875*	*-11.3%*
*1.2 Pre paid***	*13,276*	*14,221*	*-6.6%*
1.3 Log & Surf	*774*	*780*	*-0.8%*
1.4 (ADSL)	*39,140*	*37,085*	*5.5%*
2. Broadband Internet Subscribers (leased Line)	***391***	***379***	***3.2%***
Internet Penetration*	**2.6%**	***2.7%***	***-3.7%***

***** Penetration rates based on the latest published population by MONE: 2,867,000.***

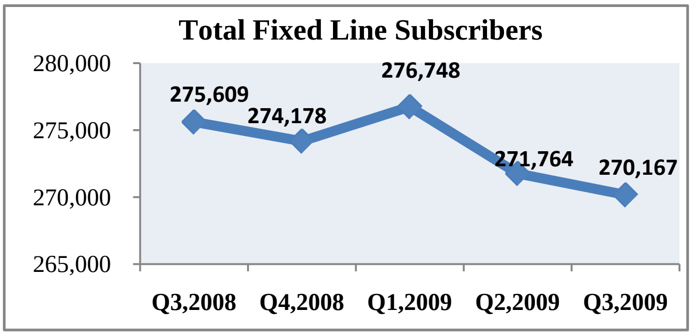
***** Prepaid subscribers are calculated on the bases of average dial up usage***

Fixed Line Services

Main Fixed Lines:

Total main fixed line experienced continuous reduction during the second and third quarters 2009 of 2%, and 0.6% respectively. The third quarter ended with total of 270,167 fixed lines.

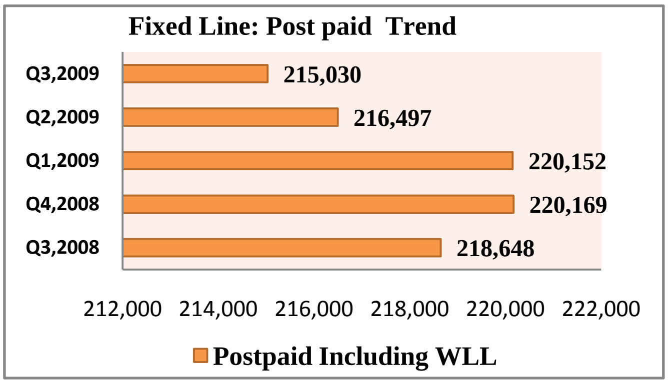
Figure.1: Total Main Fixed lines Trend



Fixed Line: Post paid

During the period from July to September 2009, fixed post paid declined by 1,467 lines. Fixed post paid reached 215,030 lines.

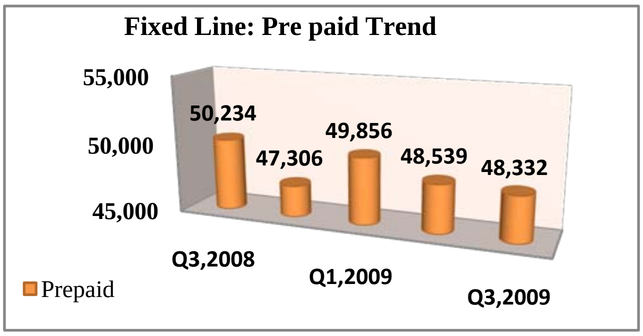
Figure.2: Fixed line: Post paid Trend



Fixed Line: Prepaid

Fixed Pre paid lines declined by 207 lines end with 48,332 lines at the end of 3rd quarter 2009.

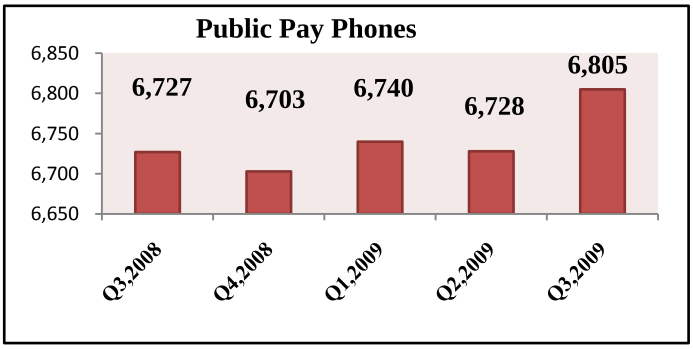
Figure.3: Fixed line: Pre paid Subscribers



Pay Phones

A total of 77 public pay phones were added during the third quarter 2009 bringing the total to 6,805 pay phones.

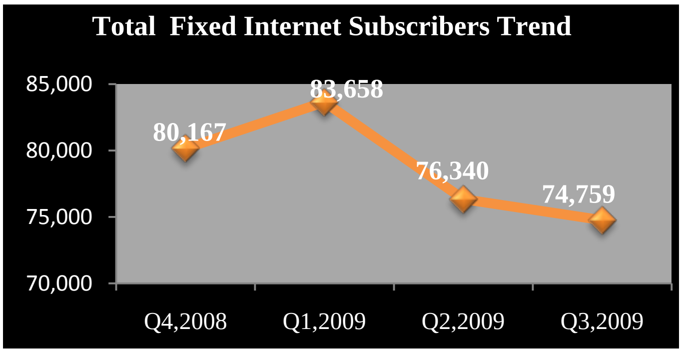
Figure.4: Public Pay Phones Trend



Internet Services:

By the end of September 2009, there were 74,759 total fixed internet subscribers reported by Omantel. This shows a drop of 2% with comparison to June 2009.

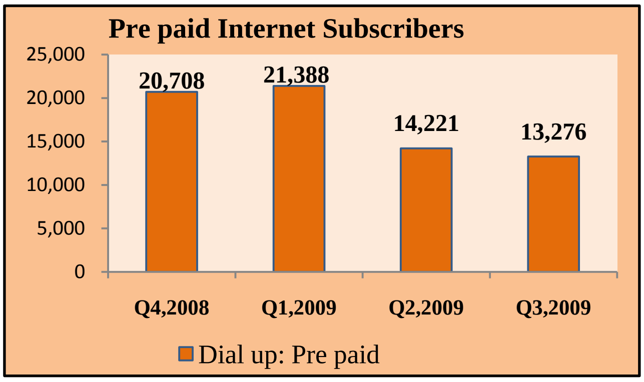
Figure.5: Internet Subscribers



Internet Pre paid Subscribers:

Due to the decline in the sales of pre paid cards, the estimated internet prepaid subscribers went down from 14,221subscribers to 13,276 subscribers during the third quarter 2009 compared to the last quarter.

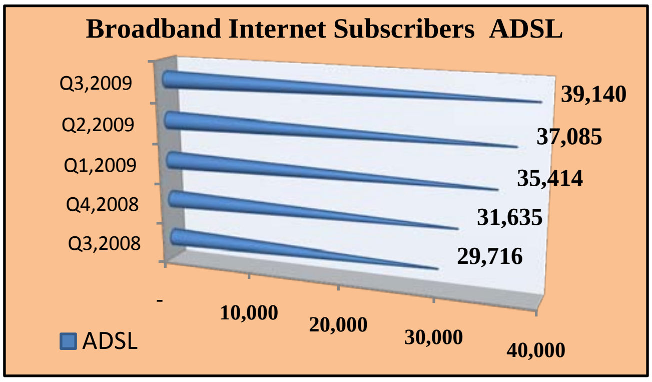
Figure.6 Prepaid Internet Subscribers



ADSL Subscribers

With 5.5% increase, ADSL reached a total of 39,140 subscribers during the period from July to September 2009.

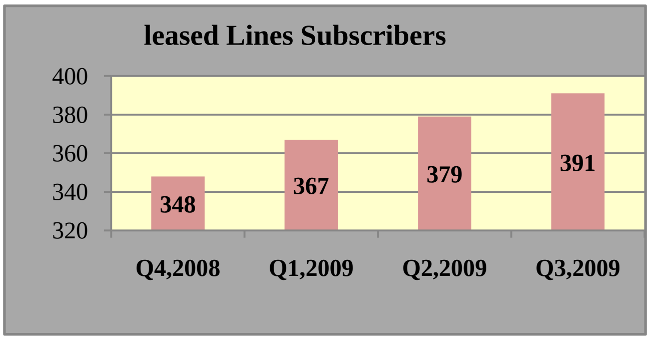
Figure.7: ADSL Subscribers



Internet leased Lines:

During the previous quarter, 12 new leased line subscribers added, which brought about 3% growth rate.

Figure.8: leased Lines Trend

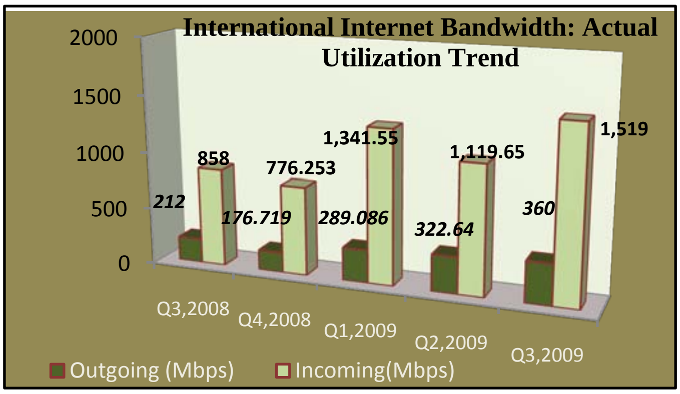


International Internet Bandwidth

During the third quarter 2009, Omantel increased international internet capacity from 2,955 Mbps to 4,195 Mbps.

Actual utilization of both outgoing and incoming international internet bandwidth has been enhanced by 36%, and 11% respectively during the third quarter.

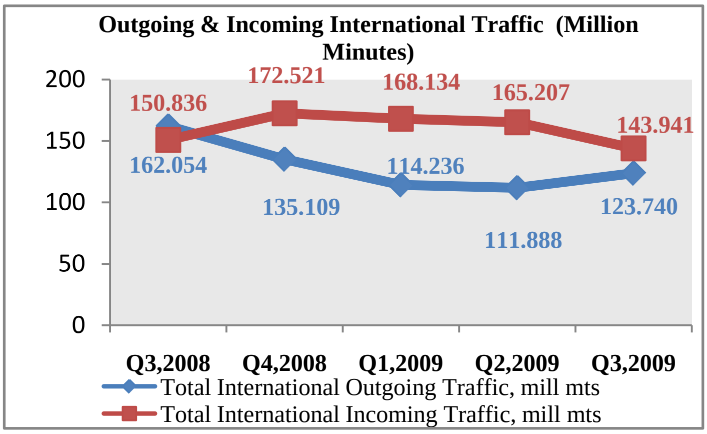
Figure.9: International Internet Bandwidth



International Traffic

Total international outgoing traffic presented growth of 10.5%, while the incoming traffic declined by 13% during the reported period.

Figure.10: 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.11: ARPU/Month for Post paid

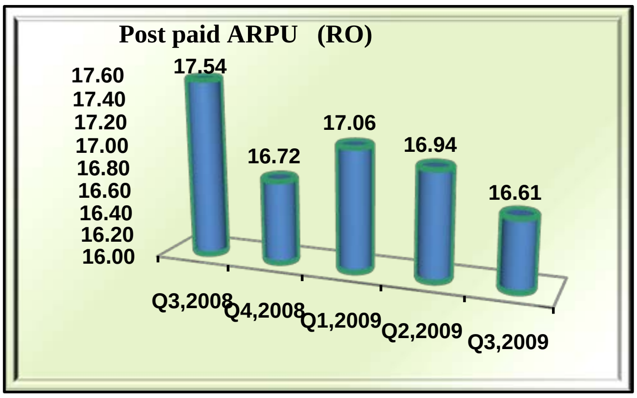


Figure.12: ARPU/Month for Pre paid

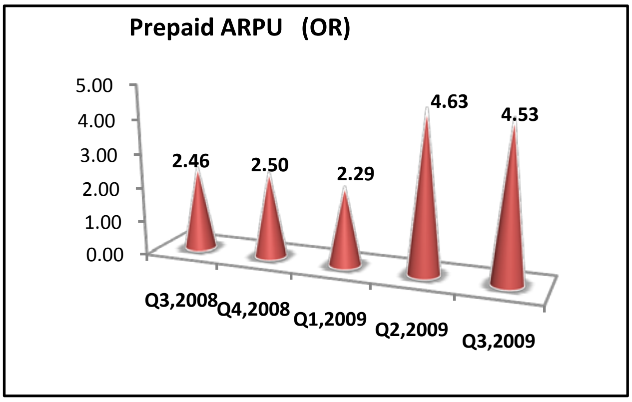


Figure.13: ARPU/Month for Payphone

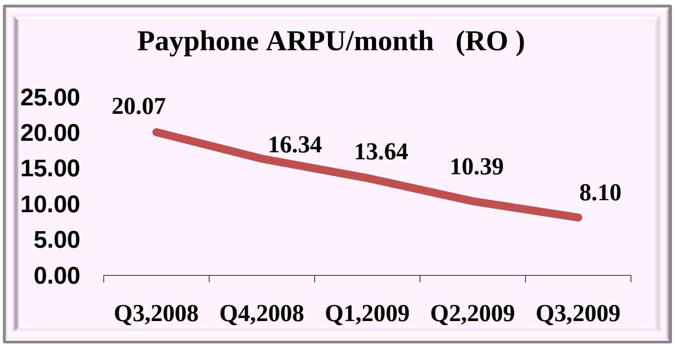
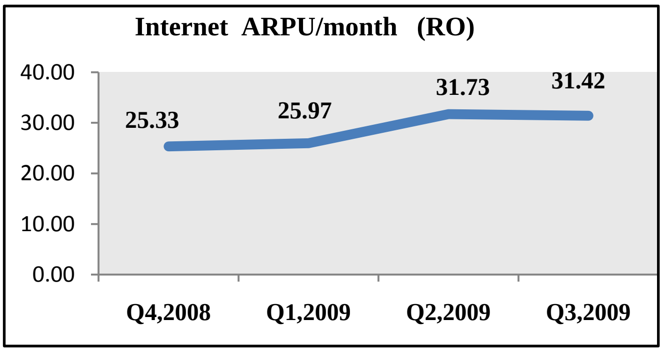


Figure.14: ARPU/Month for Internet

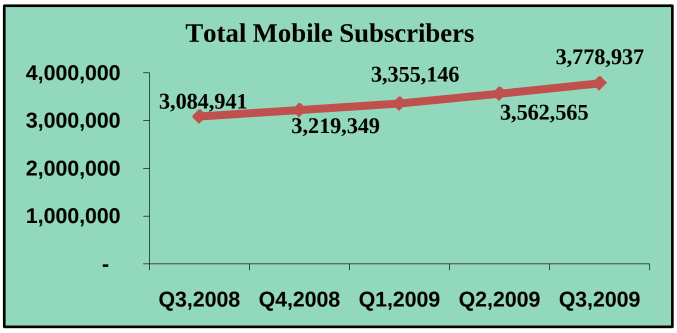


Mobile Services

Mobile Subscribers

Both the second and third quarters marked 6% growth in the total mobile subscribers. The third quarter ended with 3,778,937 subscribers with an addition of 216,372 subscribers.

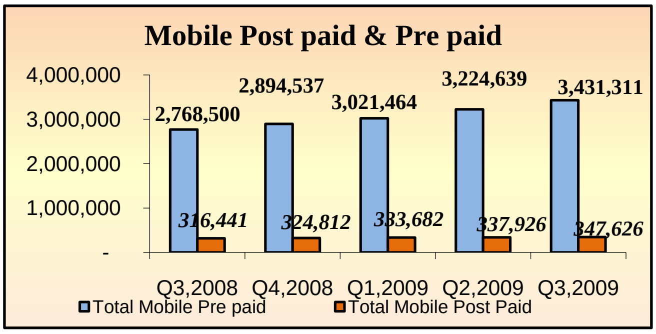
Figure.15: Total Mobile Subscribers



Mobile Postpaid & Pre paid Subscribers

Representing 90% of the total mobile sector, the mobile pre paid subscribers increased by 6.4% from Q2 to Q3, 2009. The post paid also grew by almost 3% during the same period under comparison.

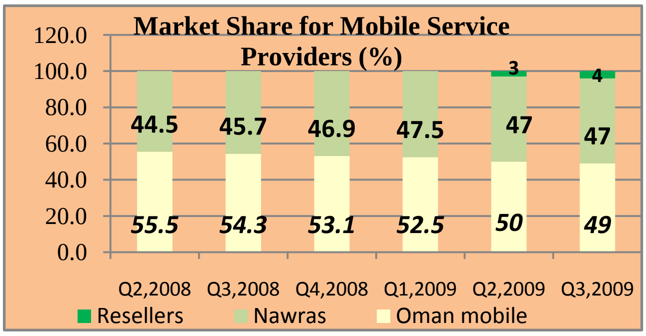
Figure.16: Mobile Post paid and Pre paid Subscribers



Mobile Market Share

By September 2009, mobile sector market shares are represented by 49% for Oman mobile, 47% for Nawras, and 4% for mobile resellers (Renna and Friendi Mobile).

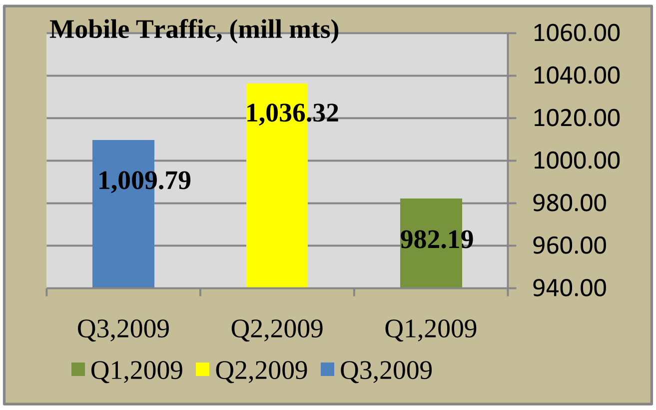
Figure .17: Mobile Operators' Market Share



Mobile Traffic

Mobile subscribers generated 1,009.79 million minutes during the third quarter 2009, which is 2.5% less than the second quarter traffic.

Figure .18: Mobile Traffic

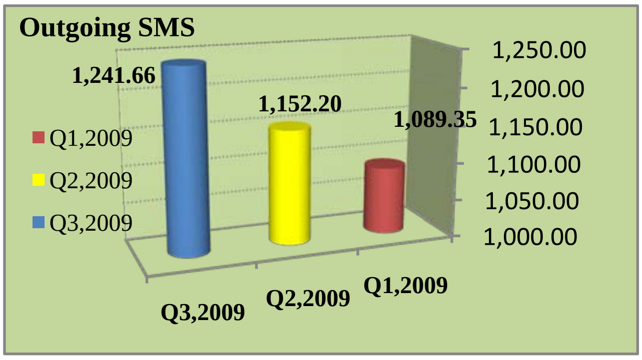


SMS

Total outgoing messages achieved the growth rate of 7.7% by end of September 2009 over June 2009 with a total of 1,241.66 million SMS.

The Number of outgoing MMS grew by 24% to 8.579 million MMS during the stated period.

Figure .19: Mobile SMS



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

Average mobile revenue per user was RO 8.81 for September 2009 as compared to RO 9.88 for June 2009.

Figure.20: Mobile Services ARPU/Month