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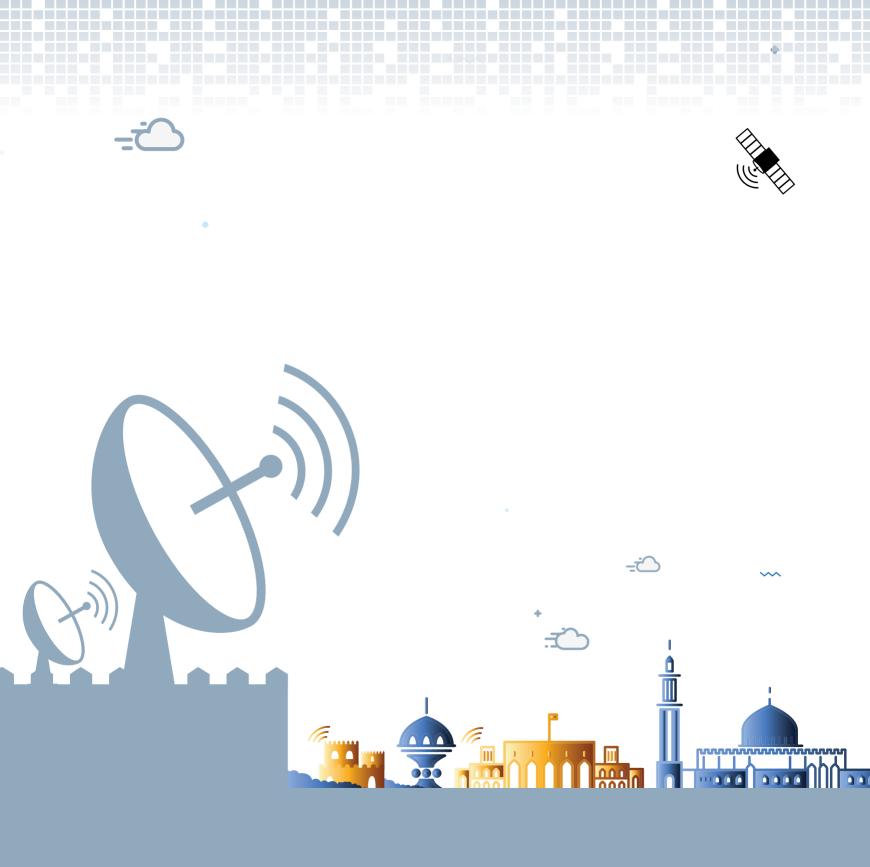
Telecom Sector of Oman (2010 - 2014)

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Telecommunications Sector Indicators 2010-2014



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Disclaimer

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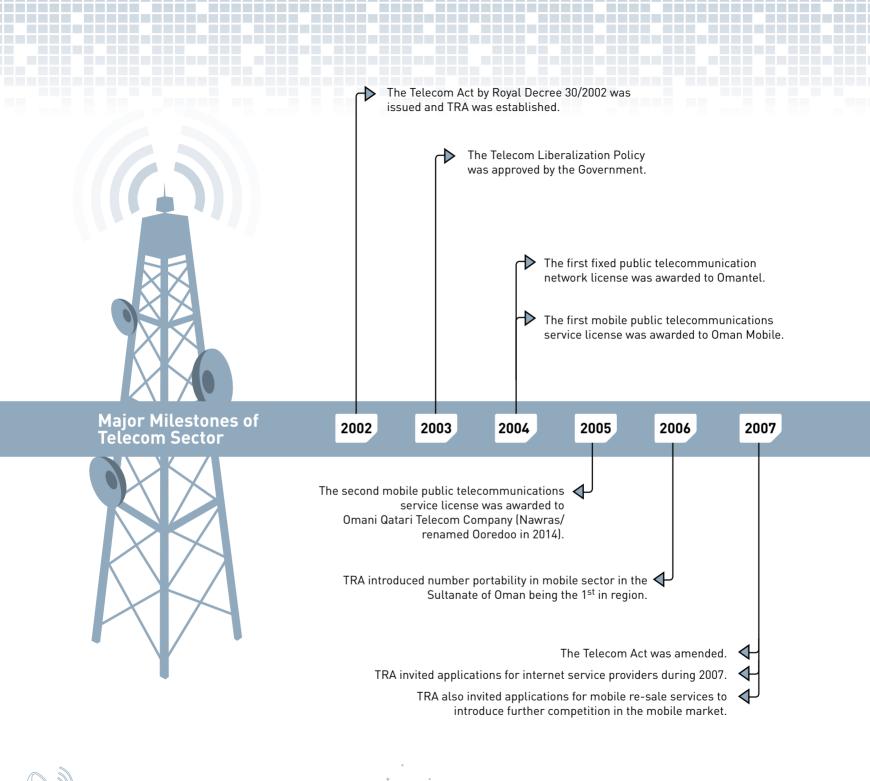


Foreword

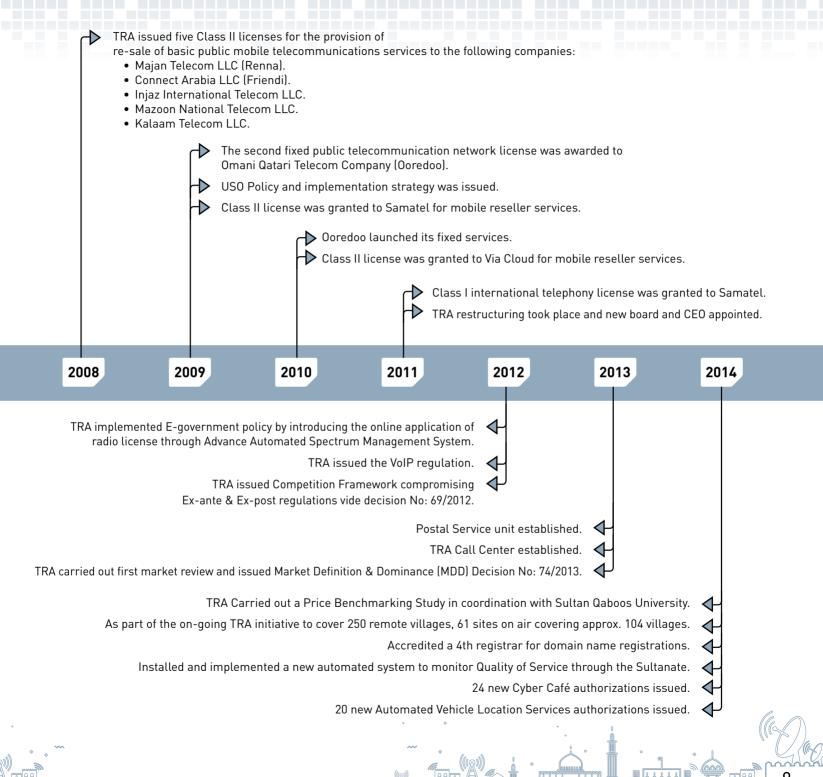
It is my profound pleasure to present the 2nd publication of the Telecom Sector Indicators report of the Sultanate of Oman. This publication covers 5 years period from 2010 to 2014 summarizing the main telecom sector indicators. The TRA has been regularly publishing Telecom Sector Indicators on quarterly basis to serve a variety of users and stakeholders including investors and financial advisors. Moreover, TRA published a comprehensive 5 year compendium in 2012 covering the period of 2007 to 2011. The first publication was received well by users in the industry. Encouraged by the user response, we are happy to present the 2nd edition of "5 years at a glance report". This report provides an overview of telecom sector development in figures and charts during the last 5 years.

I am confident that the information contained in this report will be useful to the industry analysts, investors, academia and the general public. Your feedback is of immense importance for us, therefore, comments and suggestions are most welcome.

> Dr. Hamad Bin Salem Al-Rawahi Executive President



Telecommunications Sector Indicators 2010-2014



Overall Economic Outlook

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Overall Economic Outlook

Indicator ¹	2010	2011	2012	2013	2014
Population ²	2,773,479	3,295,000	3,623,001	3,855,206	3,992,893
Number of Households ³	402,286	402,286	402,286	402,286	402,286
Consumer Price Index (CPI)	93.4	97.2	100	101.9	102.3
Inflation Rate	3.32%	4.07%	2.88%	1.90%	0.4%
Total GDP (Millions RO)	22,773	26,731	29,798	30,061	31,5004
GDP – Annual Growth rate	21.20%	17.4%	11.5%	0.9%	NA
Post & Telecommunication - % of Contribution to GDP	1.80%	1.60%	1.37%	1.45%	NA

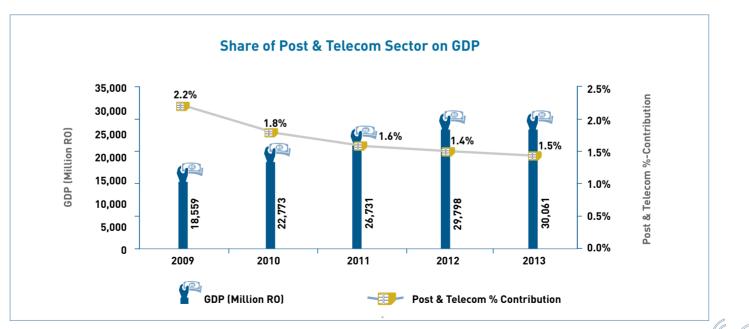
¹Economic indicators 2010-2013 as per the latest publication- Statistical year book-2013 published by NCSI.

²The population figures are as per the Statistical year book-2013 and the latest Statistics Bulletin-February 2015, published by NCSI.

³The households is as per the 2010 National Census.

⁴The 2014 GDP is provisional.

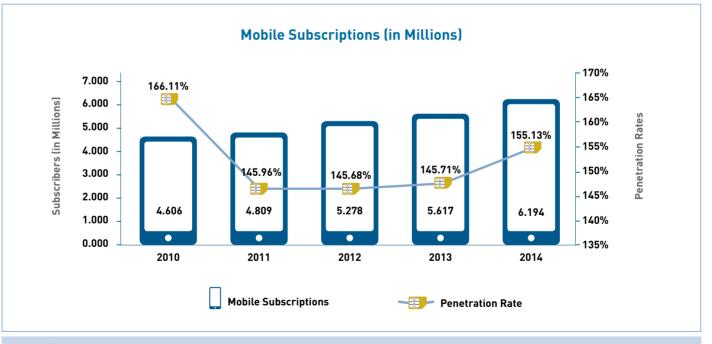
Note: It is important to highlight that subscriber's penetration rates reported in this publication are calculated based on the above population figures, which results in different penetration rates from the previous publications of TRA due to revision of population figures by NCSI in their Statistical year book-2013.





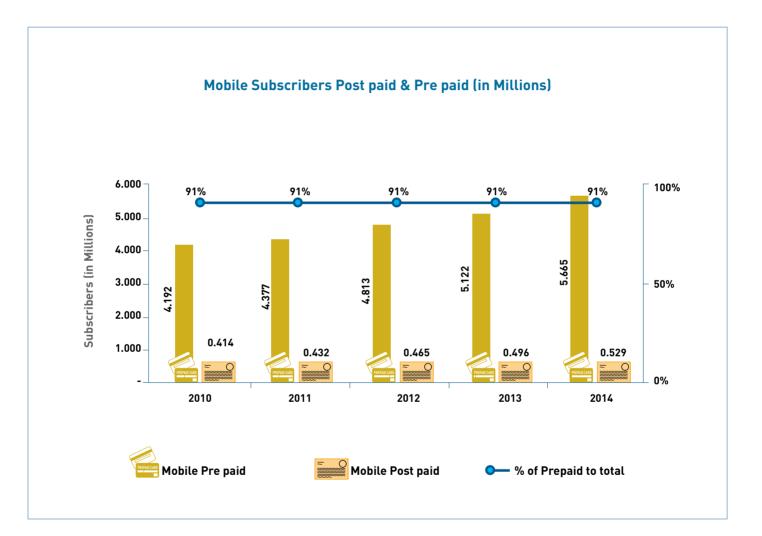
Mobile Subscriptions	2010	2011	2012	2013	2014
Operators Postpaid	414,011	432,093	464,670	495,703	528,698
Resellers Postpaid	-	-	-	-	-
- Total Postpaid	414,011	432,093	464,670	495,703	528,698
- Operators Prepaid	3,732,963	3,778,449	4,237,613	4,553,279	4,943,615
- Re-Sellers Prepaid	459,159	598,706	575,308	568,444	721,856
-Total Prepaid	4,192,122	4,377,155	4,812,921	5,121,723	5,665,471
Total Mobile Subscriptions	4,606,133	4,809,248	5,277,591	5,617,426	6,194,169
Mobile Penetration	166%	145.96%	145.68%	145.71%	155.1%

Note: The penetration rates are calculated as per the Statistical year book-2013 and the latest Statistics Bulletin-February 2015, published by NCSI.

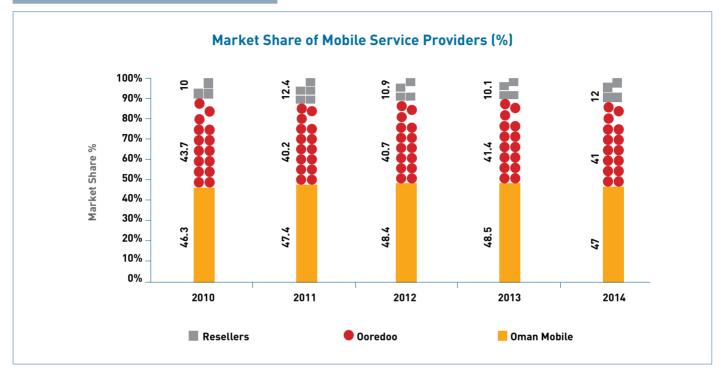


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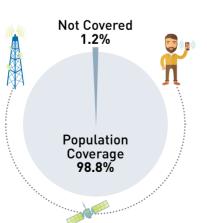
Note: The drop in penetration in 2012 onward is due to revision of population updates by NCSI.



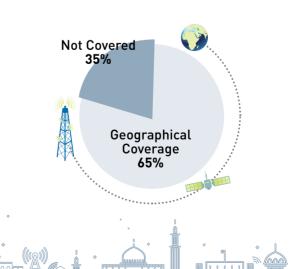




Mobile Coverage by Population as on 2014



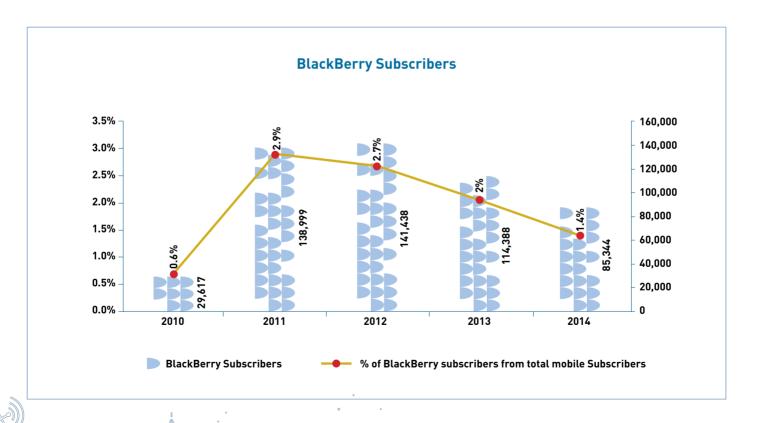
Mobile Coverage by Geographical as on 2014



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BlackBerry Subscribers

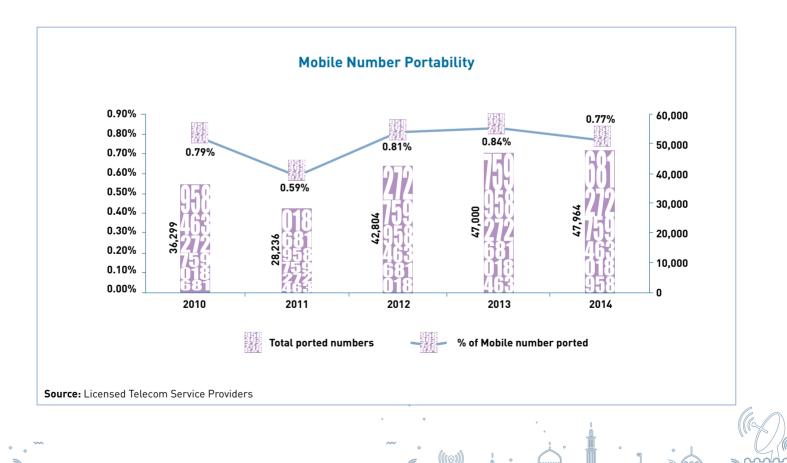
Blackberry Subscribers	2010	2011	2012	2013	2014
Post Paid (BB)	10,538	17,264	17,076	13,423	8,458
Pre Paid (BB)	19,079	121,735	124,362	100,965	76,886
TOTAL	29,617	138,999	141,438	114,388	85,344
Propotion of BlackBerry Subscribers (of Total Mobile Subscribers)	0.60%	2.90%	2.68%	2.04%	1.38%



Mobile Number Portability

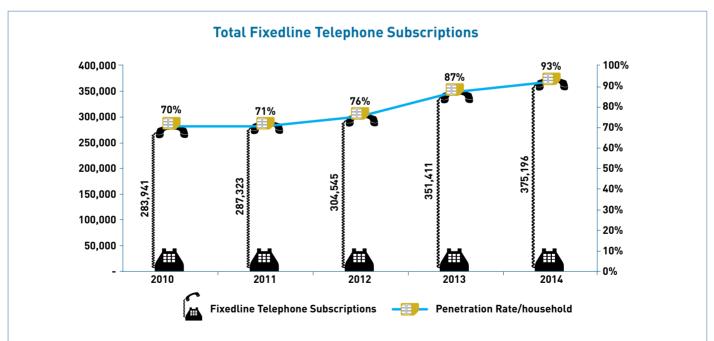
	2010	2011	2012	2013	2014
% of Mobile Number Ported	0.79%	0.59%	0.81%	0.84%	0.77%
Total Ported Numbers	36,299	28,236	42,804	47,000	47,964

Source: Licensed Telecom Service Providers



Fixedline Telephone Subscriptions	2010	2011	2012	2013	2014
- Postpaid	202,653	217,095	227,791	273,223	289,805
- Prepaid	37,523	26,345	26,065	25,829	33,066
- ISDN	36,964	37,082	43,888	45,558	45,524
- Public Telephone - Payphone	6,801	6,801	6,801	6,801	6,801
Total Fixedline Subscriptions	283,941	287,323	304,545	351,411	375,196
Fixedline Penetration (100/inhabitant)	10.24%	8.72%	8.41%	9.12%	9.40%
Fixedline Penetration/household	70.00%	71.40%	75.70%	87.35%	93.27%

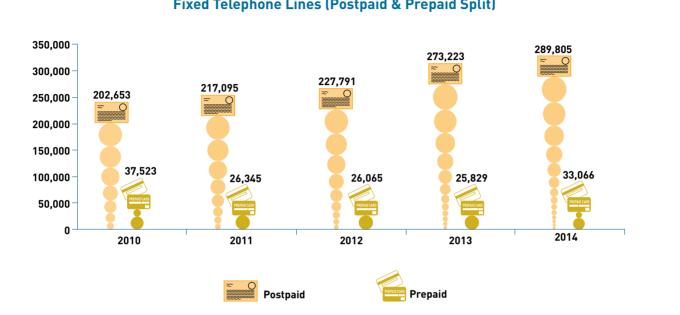
Note: The penetration rates are calculated as per the Statistical year book-2013 and the latest Statistics Bulletin-February 2015, published by NCSI. Households is as per the 2010 National Census.



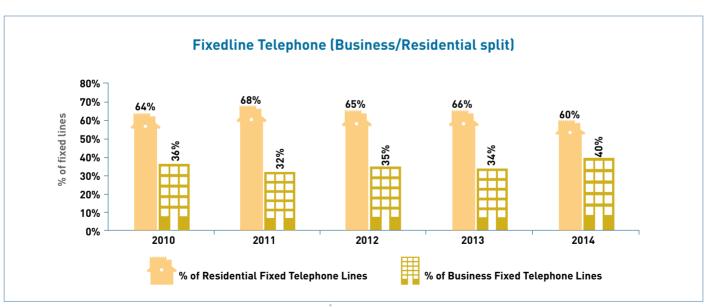
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Source: Licensed Telecom Service Providers

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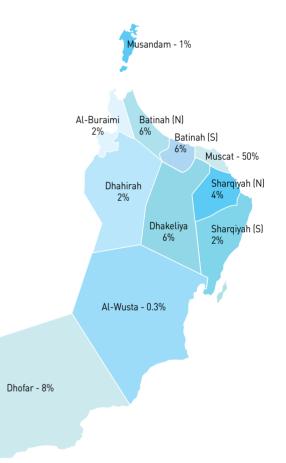
Fixed Telephone Lines (Postpaid & Prepaid Split)



Distribution of Fixedlines Telephone by Governorates

Fixed Telephone Lines By Governorates	2010	2011	2012	2013	2014
Muscat	135,193	138,982	143,845	171,442	189,076
Dhofar	20,124	22,815	24,458	28,101	29,239
Dhakeliya	19,876	20,757	21,141	23,033	23,332
Sharqiyah North	17,053	17,148	17,771	15,572	15,530
Sharqiyah South				5,239	5,737
Dhahirah	7,866	7,683	7,690	8,631	8,821
Batinah North	35,499	33,540	34,519	21,026	22,472
Batinah South				20,792	22,681
Musandam	3,127	3,030	3,222	3,514	3,609
Al-Wusta	357	358	448	793	1,153
Al-Buraimi	5,321	5,566	7,201	7,348	7,660
VSAT/GSM PP	375	362	362	362	362
ISDN	36,964	37,082	43,888	45,558	45,524
Total Fixed Telephone Lines	283,941	287,323	304,545	351,411	375,196





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Source: Licensed Telecom Service Providers

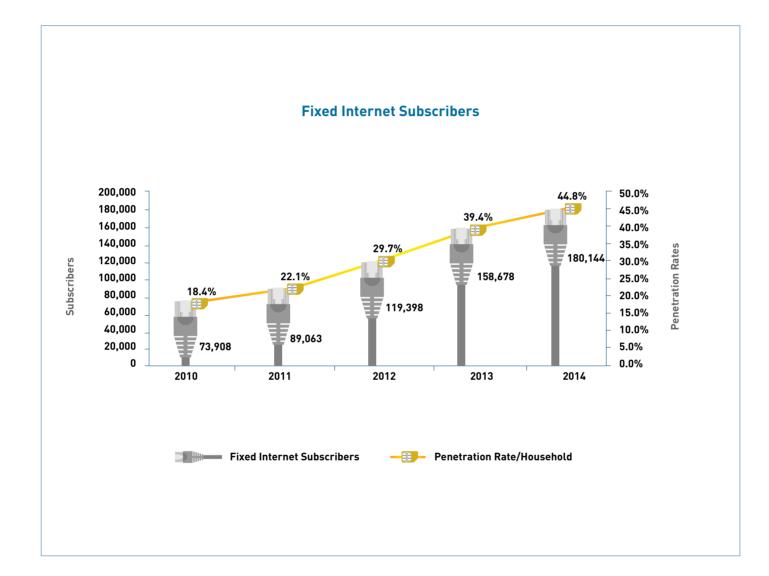


Fixed Internet	2010	2011	2012	2013	2014			
Dial up								
- Postpaid	13,140	8,226	5,406	4,202	3,074			
- Prepaid	8,138	2,620	668	186	7			
Total Dial-Up Subscriptions	21,278	10,846	6,074	4,388	3,081			
Fixed Broadband								
Fixed Wired Broadband - ADSL	44,996	52,063	70,720	94,594	124,145			
Internet Leased Line & Fiber Optic	453	499	494	654	649			
Fixed Wire-less Broadband (WiMax) Subscriptions	7,181	25,655	42,110	59,042	52,269			
Total Fixed Broadband Subscriptions	52,630	78,217	113,324	154,290	177,063			
Total Fixed Internet Subscriptions	73,908	89,063	119,398	158,678	180,144			
Internet Penetration (subscriptions/100 inhabitant)	2.7%	2.7%	3.3%	4.1%	4.5%			
Internet Penetration (subscriptions/100 household)	18.4%	22.1%	29.7%	39.4%	44.8%			

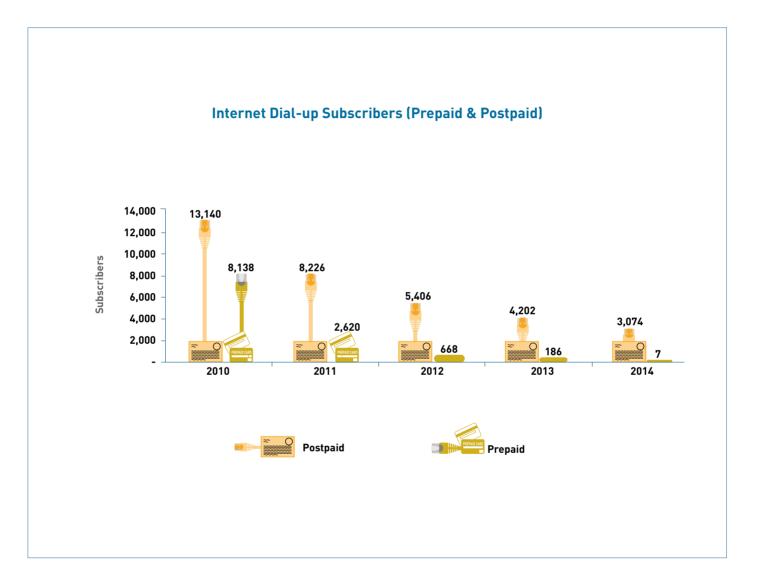
Mobile Broadband					
Active Mobile Broadband Subscriptions	734,091	1,076,254	1,646,098	2,443,296	2,893,561
Active Mobile Broadband Subscriptions Penetration (subscriptions/100 inhabitant)	26.5%	38.8%	45.4%	63.4%	72.5%

Note: The penetration rates are calculated as per the Statistical year book-2013 and the latest Statistics Bulletin-February 2015, published by NCSI. Households is as per the 2010 National Census.

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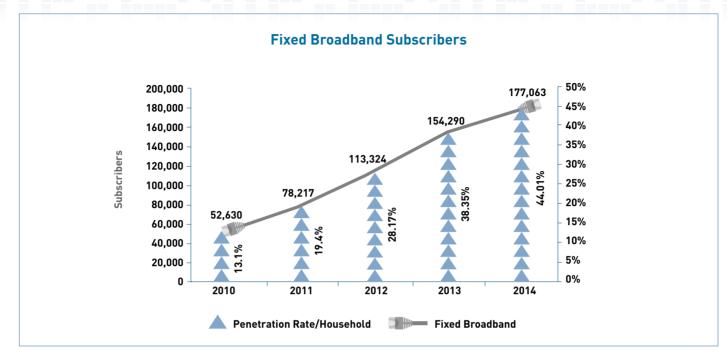
Telecommunications Sector Indicators 2010-2014

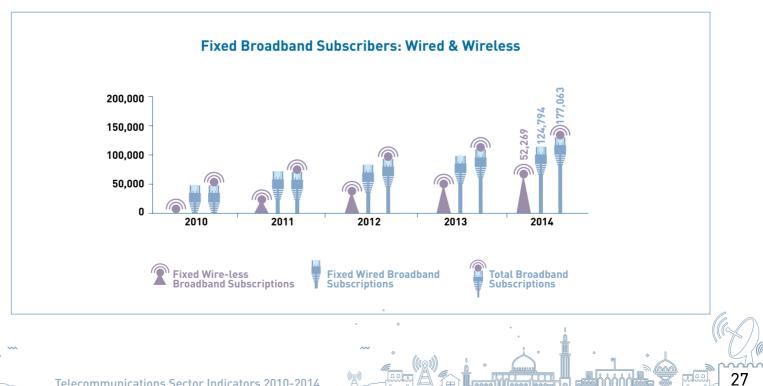


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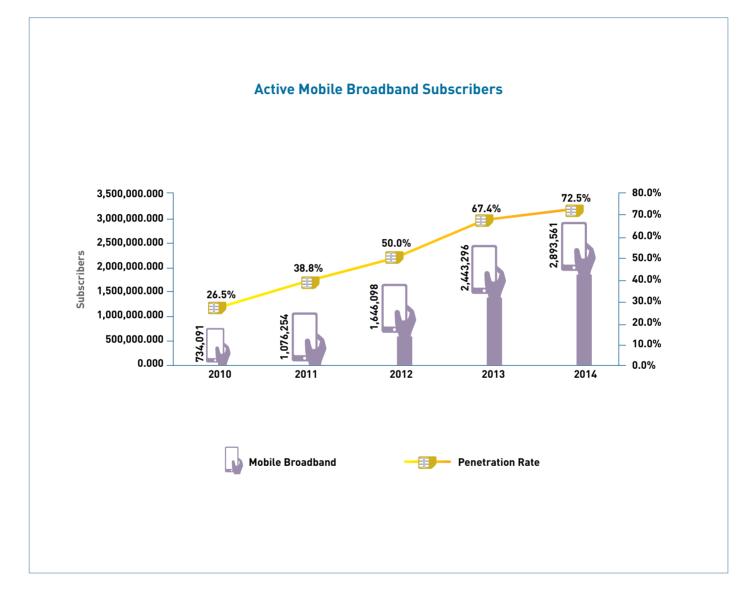
Telecommunications Sector Indicators 2010-2014



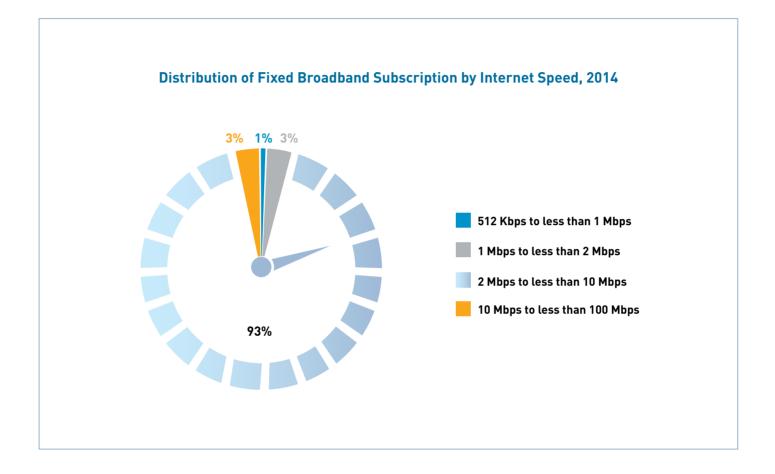




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Telecommunications Sector Indicators 2010-2014



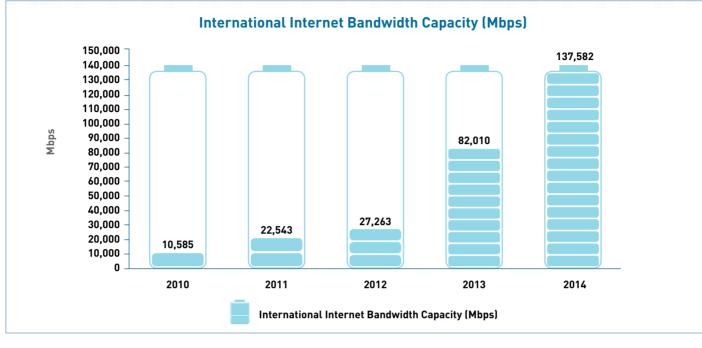
¹Active Mobile broadband Subscribers are calculated as the sum of (1&2):

- 1. Dedicated mobile broadband subscriptions: (All subscribers who have subscribed to a data plan which has subscription charge and fixed period of subscription irrespective of the subscription duration (daily, weekly or monthly plans)).
- 2. Standard Mobile Broadband Subscriptions: (subscribers who use 3G broadband service at least once in a month without subscribing to a fixed duration plan. These are generally called "pay as you go" (PAYG) users).



International Internet Bandwidth Capacity (Mbps)

International Internet Bandwidth Capacity (Mbps)



International Internet Bandwidth (% Utilization) 90.0 67.6 65 57.3 80.0 54 70.0 44 60.0 50.0 \cap 40.0 30.0 16.8 12.4 10.6 20.0 8.6 8.7 Δ 10.0 0.0 2010 2011 2012 2013 2014 Outgoing, Mbps Incoming, Mbps 6

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Telecommunications Sector Indicators 2010-2014

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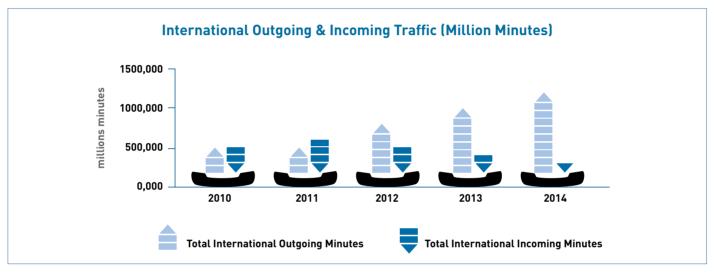
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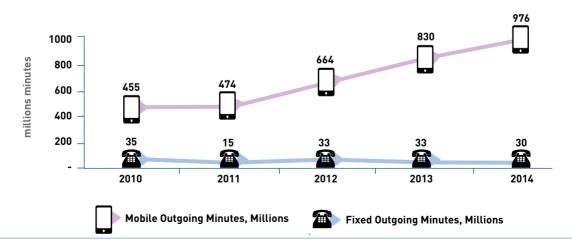
International Traffic (Million Minutes)

Million Minutes	2010	2011	2012	2013	2014
Total International Outgoing Minutes	489.396	488.686	697.083	863.688	1006.0
Total International Incoming Minutes	514.761	593.478	443.741	375.868	308.246

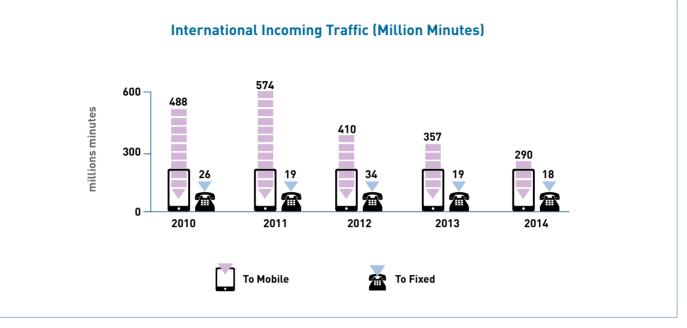
Source: Licensed Telecom Service Providers & Resellers

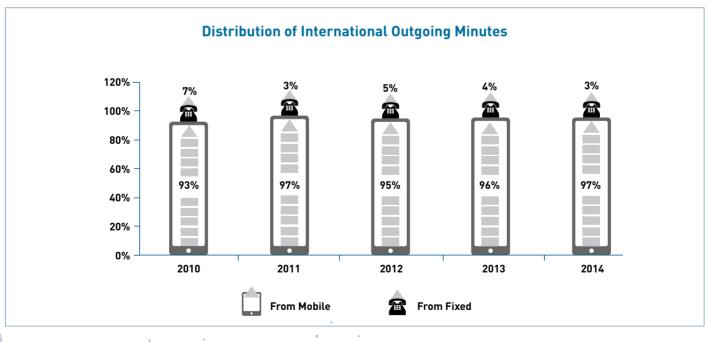


International Outgoing Traffic (Million Minutes)

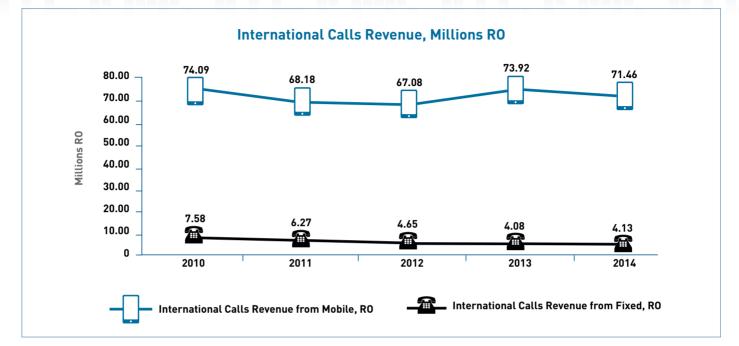


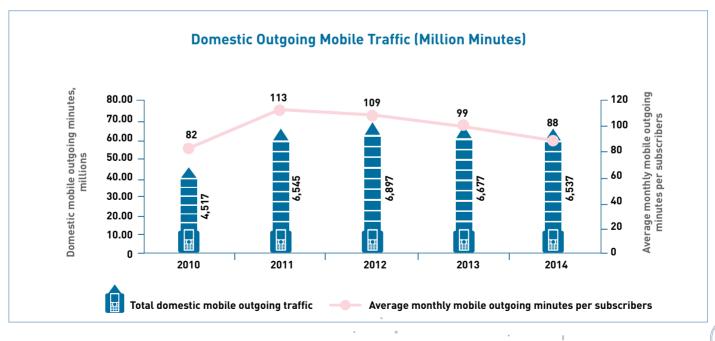
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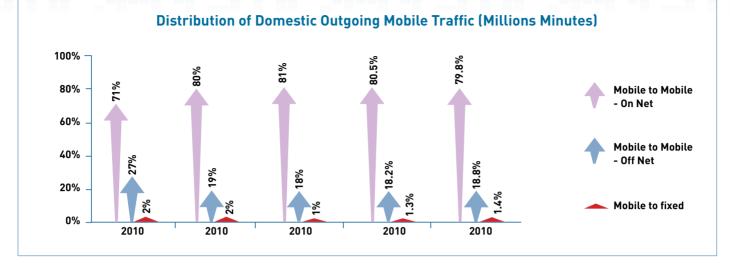




Telecommunications Sector Indicators 2010-2014







Outgoing SMS & MMS Traffic (Millions)

No. of Outgoing SMS & MMS Traffic (Millions)							
	2010	2011	2012	2013	2014		
Outgoing SMS	5,388	5,872	2,441	1,982	1,440		
Outgoing MMS	26.9	38.4	18.6	10.5	5.265		

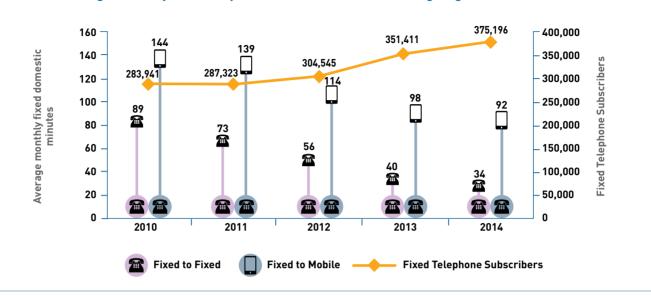
Source: Licensed Telecom Service Providers & Resellers

Domestic Outgoing Fixed Voice Traffic (Million Minutes)

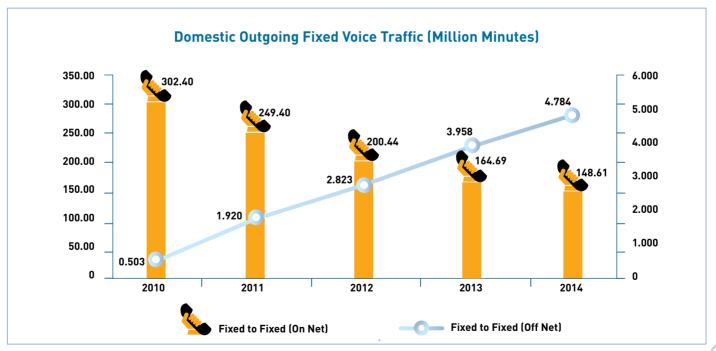
Domestic Outgoing Fixed Voice Traffic (Million Minutes)	2010	2011	2012	2013	2014
Fixed to Fixed	302,904,961	251,317,560	203,262,856	168,648,835	153,391,621
Fixed to Mobile	492,246,803	480,561,531	416,765,370	412,399,351	412,396,346
Fixed to Fixed (On Net)	302,401,584	249,397,785	200,440,340	164,691,203	148,608,068
Fixed to Fixed (Off Net)	503,377	1,919,775	2,822,516	3,957,632	4,783,553

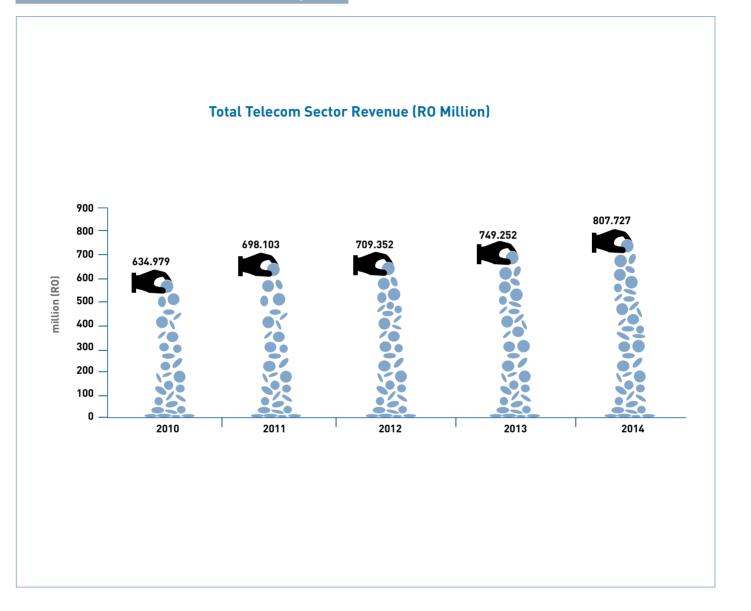
Source: Licensed Telecom Service Providers & Resellers

Telecom Traffic

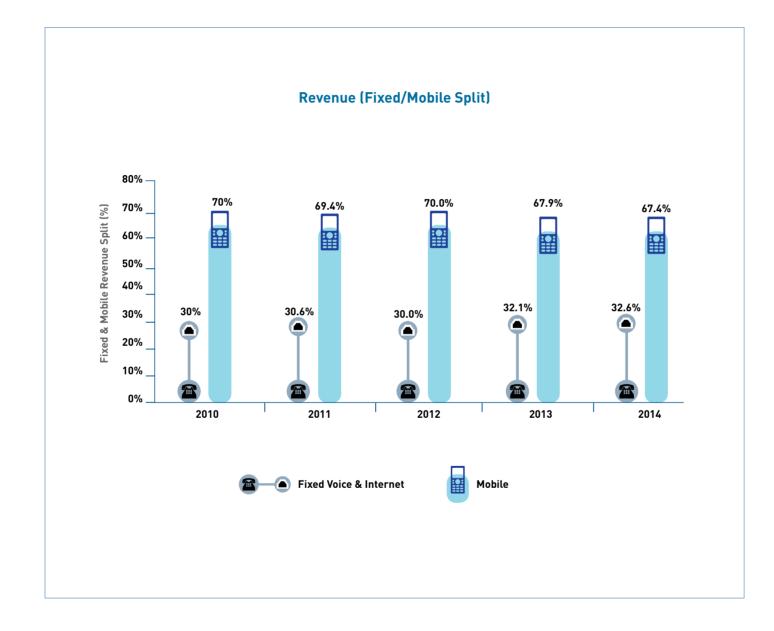


Average Monthly Minutes per Subscriber (Domestic Outgoing Fixed Voice Traffic)





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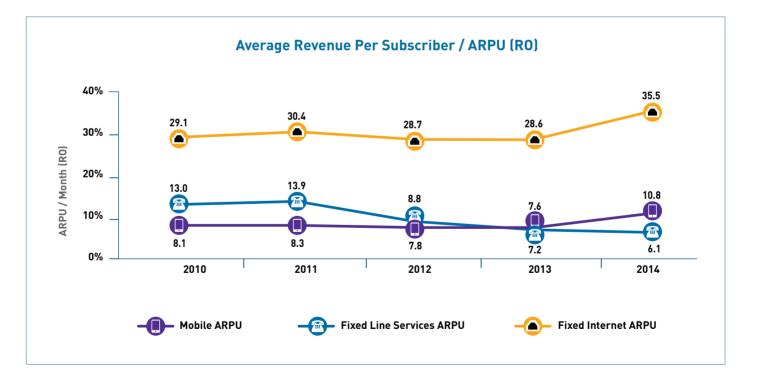


Telecommunications Sector Indicators 2010-2014

Services	2010	2011	2012	2013	2014
ARPU – Mobile	8.1	8.3	7.8	7.55	10.81
ARPU – Fixed Telephone (voice)	13	13.9	8.8	7.2	6.1
ARPU – Payphone	4.2	2.9	2.5	2.5	2.3
ARPU – Fixed Internet	29.1	30.4	28.7	28.6	35.5

Average Revenue Per Subscriber/ARPU (RO)

Source: Licensed Telecom Service Providers, Resellers & TRA

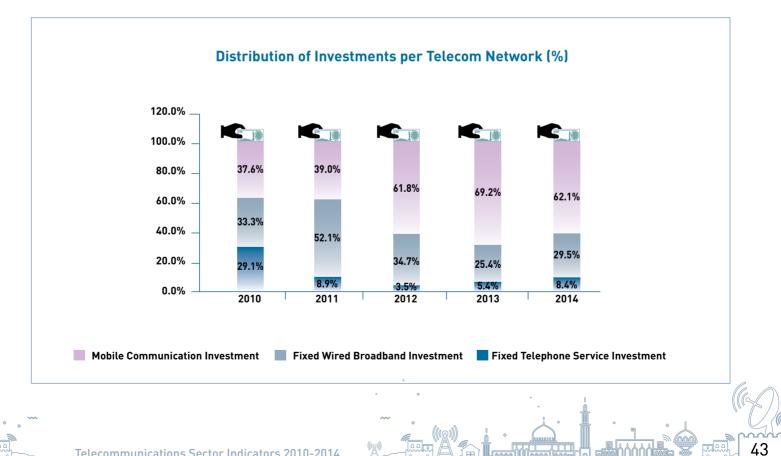


Investments

Total Investments by Networks (RO)

	2010	2011	2012	2013	2014
Total Telecom Investment, RO	170,367,265	131,841,962	137,335,996	156,532,147	219,610,030
Fixed Wired Broadband	49,548,000	11,736,920	4,850,000	8,441,516	18,531,709
Fixed Telephone Service investments, including all related services except fixed broadband	56,761,000	68,667,540	47,657,441	39,711,610	64,694,554
Mobile Communication Network	64,058,265	51,437,502	84,828,555	108,379,021	136,383,767

Source: Licensed Telecom Service Providers



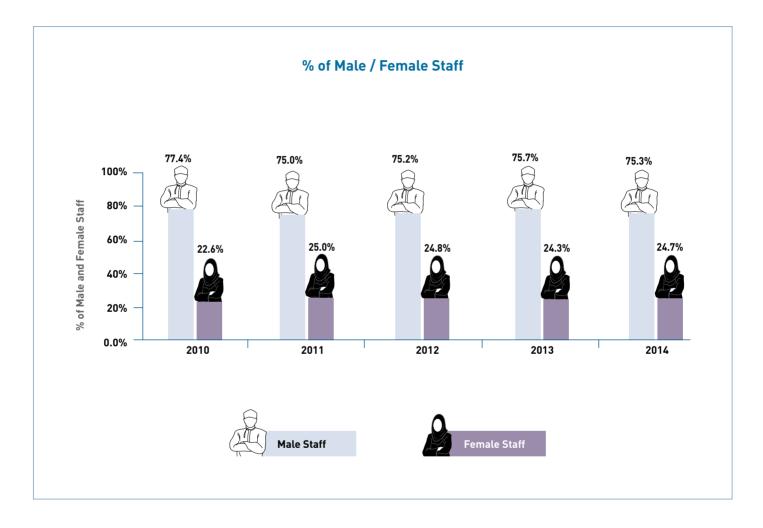


Telecom Staff	2010	2011	2012	2013	2014
Total Full-Time Telecom Staff	3,833	4,087	3,954	3,988	4,007
Male Staff	2,967	3,065	2,973	3,018	3,018
Female Staff	866	1,022	1,022 981		989
Omani Staff	3,371	3,676	3,541	3,580	3,615
Expat Staff	462	411	413	408	392

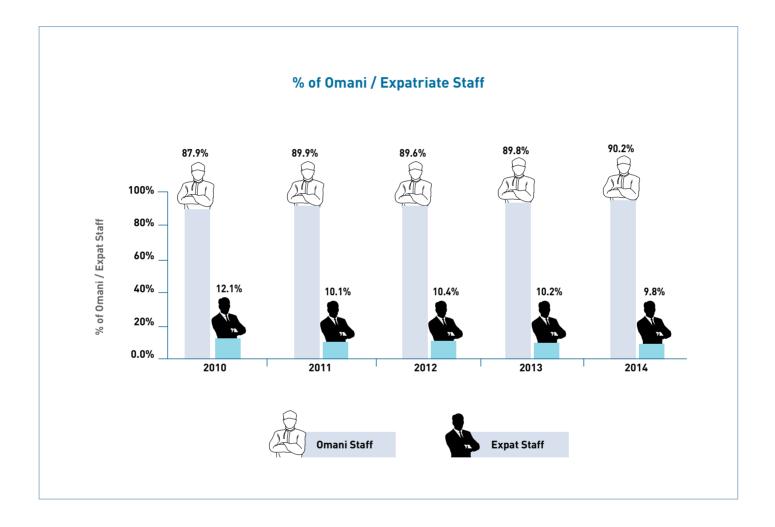
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Source: TRA, Licensed Telecom Service Providers & Resellers

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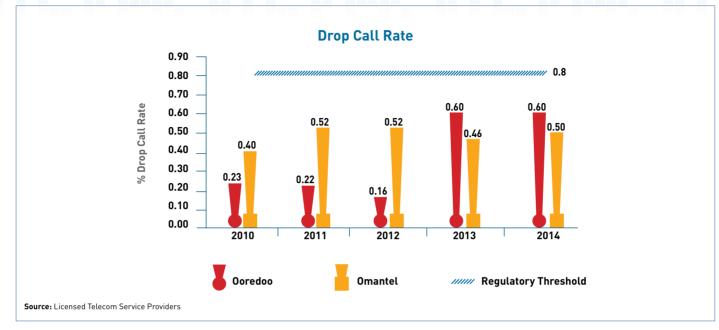
Telecommunications Sector Indicators 2010-2014

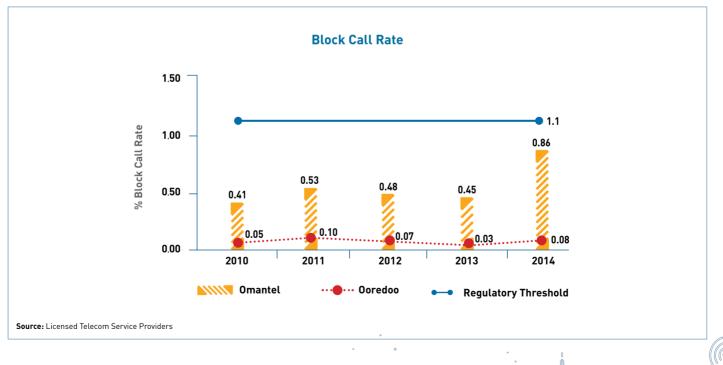


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Telecommunications Sector Indicators 2010-2014

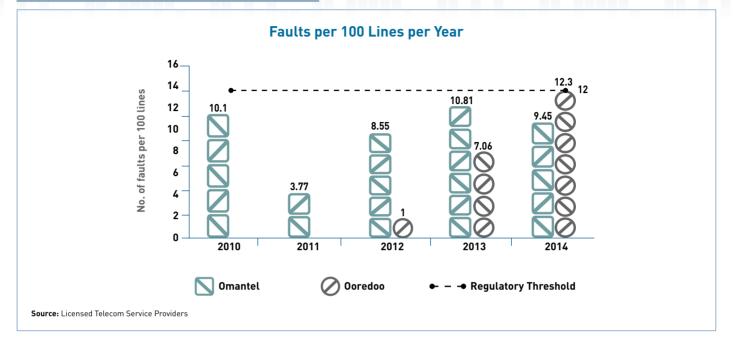


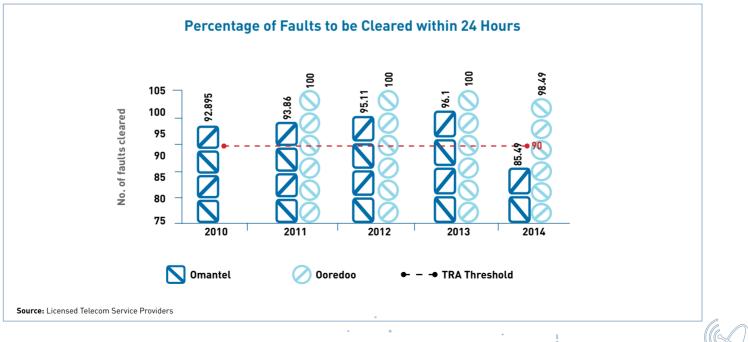


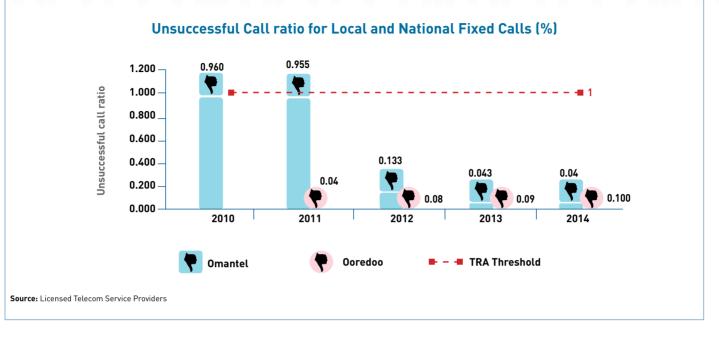


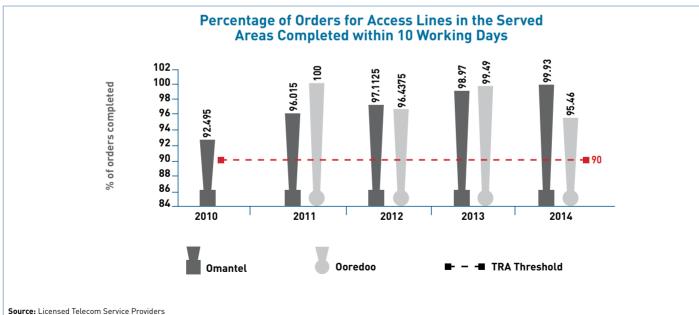




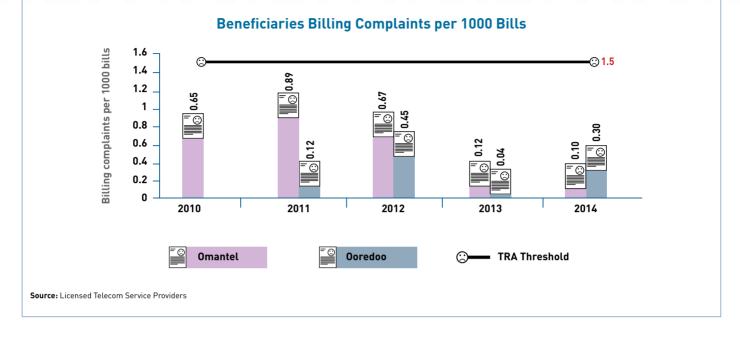


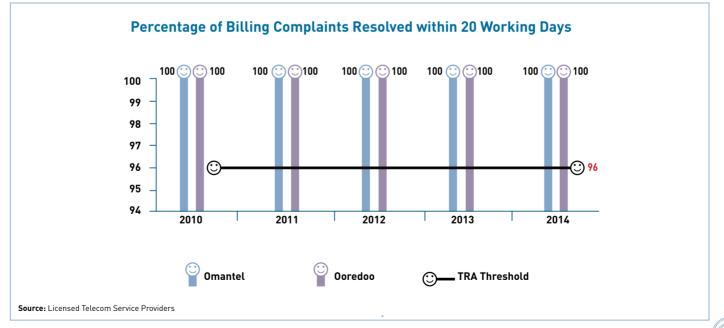






Telecommunications Sector Indicators 2010-2014







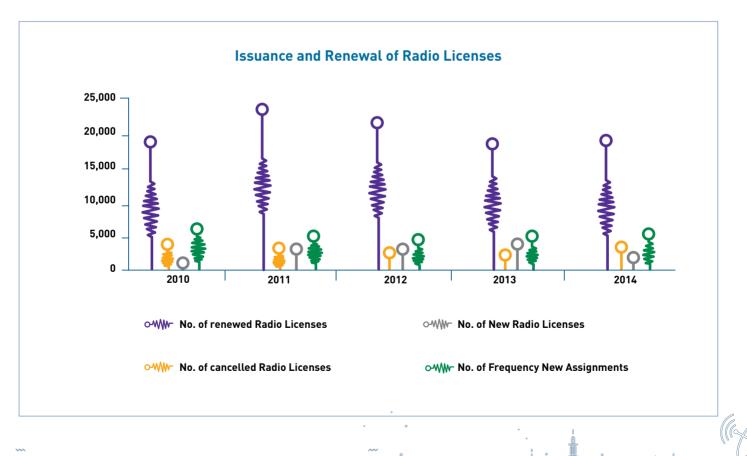
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Radio Licenses

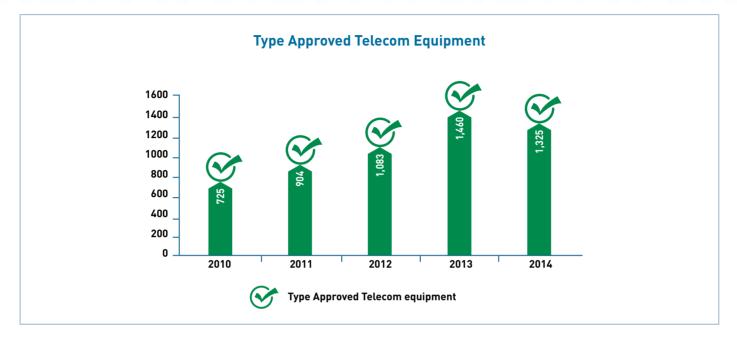
Issuance and Renewal of Radio Licenses

	2010	2011	2012	2013	2014
No. of renewed Radio Licenses	18,407	22,974	21,258	18,253	18,574
No. of New Radio Licenses	3,674	2,948	2,428	2,304	2,854
No. of cancelled Radio Licenses	1,222	2,114	3,066	3,731	1,331
No. of Frequency New Assignments	6,464	5,152	4,396	4,955	5,055



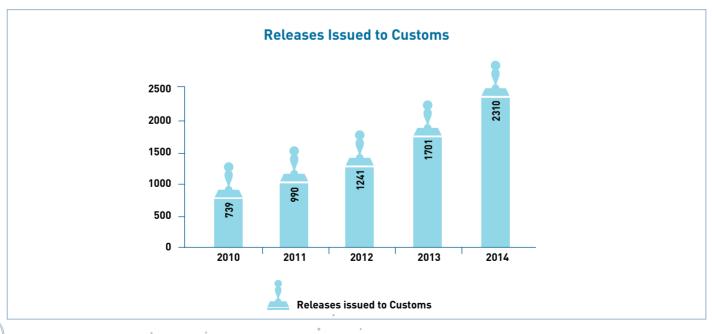
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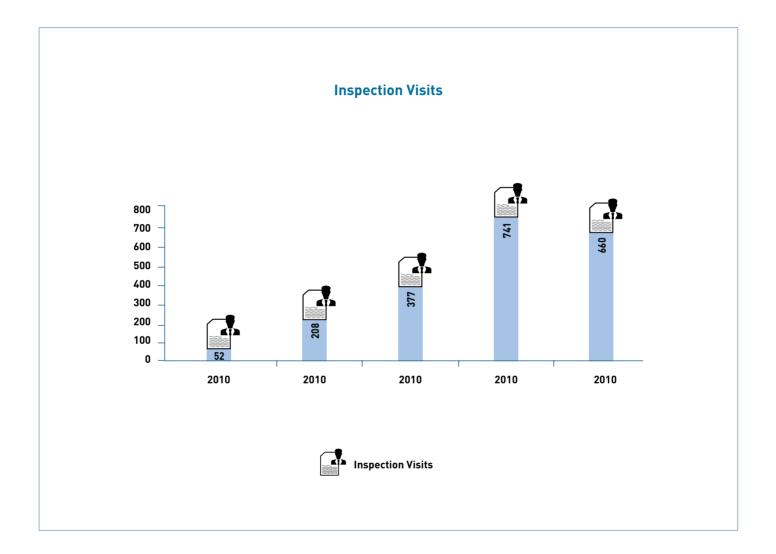
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Promotions & Tariffs

Mobile Tariff (Standard Rate)

Mobile Tariff	Oman mobile	Ooredoo
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Postpaid

	Year	2010	2011	2012	2013	2014	Year	2010	2011	2012	2013	2014
SIM Pack Charge (OMR)		2	2	2	2	2	SIM Pack Charge (OMR)	5	5	5	2	2
monthly rental (OMR)		3	3	3	3	3	Monthly Rental (OMR)	3	3	3	3	3
Calling rate (Bz/min)	OM Peak	39	39	39	39	39	Ooredoo On-net (Bz/min)	19	19	19	19	19
(Bz/min)	OM Off- peak	29	29	29	29	29	Ooredoo Off-net (Bz/min)	39	39	39	39	39
GPRS (bz/kb)		0.5	0.5	0.05	0.05	0.05		0.5	0.25	0.25	0.25	0.25

Prepaid

	Year	2010	2011	2012	2013	2014	Year	2010	2011	2012	2013	2014
SIM Pack Charge (OMR)		3	3	3	3	2		5	5	5	3	2
Talk time included (OMR)		1	1	1	1	2		2	2	2	2	2
Calling rate (Bz/min)	OM Peak	55	55	55	55	55	Ooredoo Peak (Bz/min)	55	55	55	55	55
(Bz/min)	OM Off- peak	39	39	39	39	39	Ooredoo Off-peak (Bz/min)	39	39	39	39	39
GPRS (bz/kb)		0.5	0.5	0.5	0.05	0.05		0.5	0.5	0.5	0.5	0.5

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Mobile International Tariff (Standard Rate)

omantet international Rates											
	2010	2011	2012	2013	2014						
Destination	Peak	Peak	Peak	Peak	Peak						
India	0.200	0.200	0.175	0.175	0.175						
Pakistan	0.225	0.225	0.175	0.175	0.175						
Bangladesh	0.225	0.225	0.175	0.175	0.175						
UAE	0.170	0.170	0.150	0.150	0.150						
UK	0.225	0.225	0.175	0.175	0.175						
USA	0.190	0.190	0.175	0.175	0.175						
Egypt	0.200	0.200	0.175	0.175	0.175						
Jordan	0.200	0.200	0.175	0.175	0.175						

Destination	Off-Peak	Off-Peak	Off-Peak	Off-Peak	Off-Peak
India	0.175	0.175	0.085	0.085	0.085
Pakistan	0.171	0.171	0.085	0.085	0.085
Bangladesh	0.171	0.171	0.085	0.085	0.085
UAE	0.105	0.105	0.085	0.085	0.085
UK	0.190	0.190	0.085	0.085	0.085
USA	0.165	0.165	0.085	0.085	0.085
Egypt	0.175	0.175	0.085	0.085	0.085
Jordan	0.175	0.175	0.085	0.085	0.085

Omantel International Rates

	2010	2011	2012*	2013	2014
Destination	Peak	Peak	Peak	Peak	Peak
India	0.199	0.199	0.199	0.199	0.199
Pakistan	0.219	0.219	0.219	0.219	0.219
Bangladesh	0.219	0.219	0.219	0.219	0.219
UAE	0.169	0.169	0.169	0.169	0.169
UK	0.219	0.219	0.219	0.219	0.219
USA	0.199	0.199	0.199	0.199	0.199
Egypt	0.199	0.199	0.199	0.199	0.199
Jordan	0.199	0.199	0.199	0.199	0.199

Ooredoo International Rates

Destination	Off-Peak	Off-Peak	Off-Peak	Off-Peak	Off-Peak
India	0.099	0.099	0.099	0.099	0.099
Pakistan	0.099	0.099	0.099	0.099	0.099
Bangladesh	0.099	0.099	0.099	0.099	0.099
UAE	0.099	0.099	0.099	0.099	0.099
UK	0.189	0.189	0.189	0.189	0.189
USA	0.169	0.169	0.169	0.169	0.169
Egypt	0.169	0.169	0.169	0.169	0.169
Jordan	0.169	0.169	0.169	0.169	0.169

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Note: the above rates are for top few destination depicted as sample of two main operators.



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Fixed International Tariff (Standard Rate)

Omantel International Call Rates (RO)

	2010	2011	2012	2013	2014	2010	2011	2012	2013	2014
Destination	Peak	Peak	Peak	Peak	Peak	Off- Peak	Off- Peak	Off- Peak	Off- Peak	Off- Peak
India	0.200	0.189	0.169	0.169	0.169	0.175	0.089	0.065	0.065	0.065
Pakistan	0.225	0.199	0.169	0.169	0.169	0.171	0.089	0.065	0.065	0.065
Bangladesh	0.225	0.199	0.169	0.169	0.169	0.171	0.089	0.065	0.065	0.065
UAE	0.170	0.159	0.139	0.139	0.139	0.105	0.089	0.065	0.065	0.065
UK	0.225	0.199	0.169	0.169	0.169	0.190	0.179	0.065	0.065	0.065
USA	0.200	0.189	0.169	0.169	0.169	0.175	0.159	0.065	0.065	0.065
Egypt	0.200	0.189	0.169	0.169	0.169	0.175	0.159	0.065	0.065	0.065
Jordan	0.200	0.189	0.169	0.169	0.169	0.175	0.159	0.065	0.065	0.065

	20	10	2011		2012		2013		2014	
Destination	Peak	Off- Peak								
India	0.189	0.159	0.189	0.089	0.189	0.089	0.189	0.089	0.189	0.089
Pakistan	0.199	0.179	0.199	0.089	0.199	0.089	0.199	0.089	0.199	0.089
Bangladesh	0.199	0.179	0.199	0.089	0.199	0.089	0.199	0.089	0.199	0.089
UAE	0.159	0.089	0.159	0.089	0.159	0.089	0.159	0.089	0.159	0.089
UK	0.199	0.179	0.199	0.179	0.199	0.179	0.199	0.179	0.199	0.179
USA	0.189	0.159	0.189	0.159	0.189	0.159	0.189	0.159	0.189	0.159
Egypt	0.189	0.159	0.189	0.159	0.189	0.159	0.189	0.159	0.189	0.159
Jordan	0.189	0.159	0.189	0.159	0.189	0.159	0.189	0.159	0.189	0.159

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Ooredoo International Call Rates (RO)

Note: the above rates are for top few destination depicted as sample of two main operators.

Mobile Broadband Tariff

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* Note: the below rates are a sample package chosen to facilitate the comparison between the two main operators.

	Plan	Monthly Rental (RO)	Included Usage (GB)	Additional Usage (bz/MB)	Charging Unit
2010	3 GB	19	3	5	1 KB
2011	3 GB	19	3	5	1 KB
2012	3 GB	19	3	5	1 KB
2013	3 GB	19	3	5	1 KB
2014	3 GB	10	3	5	1 KB

Oman mobile - Postpaid Mobile Broadband Charges (RO)

	Plan	Max Download Speed (Mbps)	Monthly Rental (RO)	Included Usage (GB)	Additional Usage (RO/GB)	Speed Cap (Kbps)	Price Cap (RO)	Charging Unit
2010	Silver Plus	1	19	2	1	No	No	1 KB
2011	Silver Plan Plus	1	19	3	5	No		1 KB
2012	Silver Plan Plus		19	5	5			1 KB

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Ooredoo - Postpaid Mobile Broadband Charges (RO)

	Plan	Monthly Fee (RO)	Volume (GB)	Validity (days)	Out of Bundle (bz/ MB)	Charging Unit
2013	6 GB	17	6 GB	30	5	1 KB
2014	6 GB	17	6 GB	30	5	1 KB

Promotions & Tariffs

Fixed Broadband Tariff

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Fixed Broadband Plans based on 512 Kbps - 4 Mbps speed		I	Ooredoo)				Omante	el	
	2010	2011	2012	2013	2014	2010	2011	2012	2013	2014
Installation (RO)	39	39	39	39	29	10	10	10	10	10
Monthly Rental (RO)	15	9	9	9	14	12	20	20	20	20
Included Data (GB)	6	1	1	1	10	0	Unlimited	Unlimited	Unlimited	Unlimited
Out of Bundle Rate (RO/GB)	2	2	2	2	2	1	NA	NA	NA	NA

* Note: the above rates are a sample package chosen to facilitate the comparasion between the two main operators.

ACRONYMS

2G Second-Generation (Mobile Technology)	3G Third-Generation (Mobile Technology)	3G+ Enhanced Third- Generation (Mobile Technology)	3.5G Enhanced Third- Generation (Mobile Technology)	4G Fourth-Generation (Mobile Technology)
CDMA Code Division Multiple Access	FTTB Fiber-To-The- Building	FTTH Fiber-To-The-Home	FTTx Fiber to the x	GCC Gulf Cooperation Council
GDP Gross Domestic Product	IP Internet Protocol	ARPU Average Revenue Per User	LLU Local Loop Unbundling	LTE Long Term Evolution
Mbps Megabits Per Second	MVNO Mobile Virtual Network Operator	PSTN Public Switched Telephone Network	TRA Telecommunications Regulatory Authority (Oman)	VolP Voice Over Internet Protocol
VSAT Very Small Aperture Terminal	Wi-Fi Wireless Fidelity	WiMAX Worldwide Interoperability For Microwave Access	WLL Wireless Local Loop	NA Not Available

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