

## Growth Strategies of Mobile Virtual Network Operators in Oman

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**Abstract:** The Oman telecom market consists of five Mobile Virtual Network Operators (MVNOs) and two Mobile Network Operators (MNOs). MVNOs have also sealed their deals with MNOs, technology providers, advertising and marketing agencies, SIM and re-charge coupon distribution channels. All the five MVNOs in Oman have already launched their operations and are providing services. The article is an attempt to understand many facets of MVNO business in Oman. The article discusses the present status of operations of MVNOs, their growth in Oman and world, their tariff plans, SIM card distribution channels and marketing strategies to survive in a highly competitive Omani telecom market. A set of propositions are also identified related to success of MVNOs which are proved either true or false using secondary data collected from various sources. The article concluded in the form of synthesis of data and possible new future strategies for MVNOs in Oman.

**Key words:** Distribution channels, MVNO (Resellers), off peak hours, peak hours, renna, apna mobile, TRA Oman, tariff plans

### INTRODUCTION

Finegold (2004) said that MVNOs are more linked to the customers, communities and provides need base services and contents. MVNOs compliment the efforts of mobile network operators (MNOs). MVNO's are of great help to the wireless/telecom industry, as they provide services which have more value o the customers and work with MNO who own the telecommunication infrastructure through revenue and role sharing model. MVNOs are roughly equivalent to the "switchless resellers" of the traditional landline telephone market. Christine (2007) mentioned that the role of MVNO is mainly customization of services to the selected segments of the customers.

Singh (2009) studied the MVNO business models, the status of MVNOs in various countries, MVNO categories, business strategies and possibilities of success in the context of large telecom services market of India. Paul (2008/06) identified nine major approaches of MVNOs for providing the services to the customers. These approaches are (a) Discounted Services, (b) Community Services, (c) Mobile Network Operator Emulation, (d) Premium Value Added Services, (e) Fixed to Mobile Convergence, (f) Advertising and Loyalty, (g) Enterprise, (h) Location Based Service (LBS), and (i) Telematics.

To make telecom services markets more competitive most economies have allowed entry of MVNOs to provide quality services to subscribers as mentioned by Singh (2009). Sultanate of Oman had also introduced MVNOs to fall in the line of other counties. Five licenses are issued by Omani government in MVNO category.

The concept / business model MVNO is very popular in Oman but not much literature is available on the

subject. This paper is an attempt to fill this gap. The paper discusses (i) status of MVNOs in the world, (ii) the status of the MVNOs in Oman, (iii) the strategies followed by five existing/ active MVNOs in Oman with reference to their tariff plans, marketing efforts etc.

### METHODOLOGY

The methodology adopted in the article is exploratory in nature. It is based on secondary data collected from various sources. The study was conducted during April 2010 to September 2010. The main source of data was the website of Oman's telecom regulatory authority. Other sources of data include the press releases of news papers and market research agencies, articles on Internet by academia, reports of various marketing agencies and websites of the five MVNOs under study. The data is basically analyzed for specific events, interventions in the form of promotional schemes by MVNOs, trends in subscriber base etc to conclude on the following propositions.

**Proposition 1:** Success of MVNO business model depends on flexibility of tariff of various services of MVNOs.

**Proposition 2:** Success of MVNO model depends on innovative services for specific segment of the subscribers.

**Proposition 3:** Low cost model is not the sole factor for the success of MVNO model in the long run.

**Proposition 4:** Success of MVNO depends on bundling of services in tariff models.

Table 1: MVNO status statistics

S.No.	No. of MVNO	Year	Source
1	366 active MVNOs, 89 operators who may launch MVNO	9th February, 2009	<a href="http://www.mvnodeirectory.com">http://www.mvnodeirectory.com</a>
2	430+ MVNOs operated by 380 companies	April, 2010	<a href="http://www.mvnodeirectory.com">http://www.mvnodeirectory.com</a>
3	550 + MVNOS or resellers	26 <sup>th</sup> May, 2010	Cellular News (2010)
4	600 +	30 June, 2010	Groves (2010)

**Proposition 5:** Promotion schemes of MVNO are successful if linked to social and cultural values of the subscribers.

**Proposition 6:** Low cost models are not uniform across the MVNOs.

**Proposition 7:** The growth of subscriber base will depends on its impact on financial benefits to MNO.

**Proposition 8:** The growth of subscriber base will depends on favorable regulations.

For the purpose of making a comparison among the international tariff plans of five MVNOs, the reach of their network is divided in to 8 zones as per criteria set up by Apna Mobile and FRiENDi mobile. Further division of these zones in to sub zones is considered where ever it is needed. The countries which are not common across the MVNOs are also listed and are indicated in tariff tables of comparison.

## RESULTS AND DISCUSSION

**MVNOs worldwide:** Globally, growth in wireless subscriber’s base has been driven by developing countries, such as China, India, Russia, Brazil, Indonesia, Vietnam and Pakistan. In these countries, MVNOs are either prohibited or at a nascent stage of development. If MVNOs become reality in these countries the share of MVNOs will double by 2013 in comparison to 2009 (Telegeography, 2009b). Recently as per the forecasts by SMBWorld Asia Editors (2010), the number of global MVNO subscribers will touch 85.6 million in 2015 in comparison to 52.6 million in 2009. It will grow at a Compound Annual Growth Rate (CAGR) of 8.5% during 2009 to 2015 according to Ovum. The bulk of this growth will come from Western Europe, the US, and mature mobile markets in Asia-Pacific such as Australia. These regions will continue to dominate global MVNO activity over the next five years. In Asia-Pacific, Ovum expects MVNO revenue to total to USD 980 million by 2015, an increase of 10% from 2010. By 2012, Australia is predicted to account for 30% of MVNO revenue leading the Asia-Pacific region, followed by Japan. Ovum predicts MVNO revenue in Asia-Pacific will spike in 2013.

There are currently approximately 550 planned or operational MVNOs or resellers world-wide as per

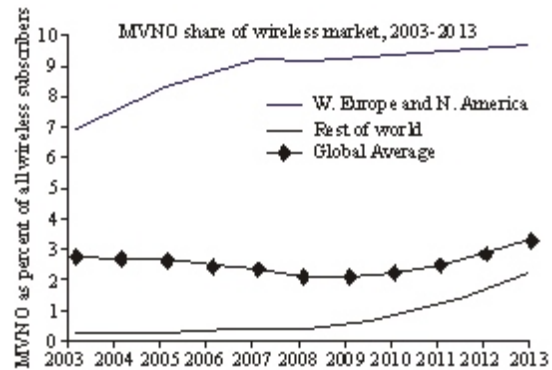


Fig. 1: MVNO share in Western Europe and North America and rest of the world, (Source: <http://www.itu.it/ITU-D/ict/newslog/MVNO+Market+To+Double+In+Four+Years+Driven+By+Emerging+Markets.aspx>)

Cellular News (2010), and 600 plus as per Groves (2010). The statistics with time line is given in Table 1. Groves (2010) also mentioned that numbers of MVNOs will surpass the number of MNO in 2013. The growth of MVNO subscribers to grow at a CAGR of 29% from 2010 to 2014 in certain Africa and Middle East markets, such as Turkey and the Arabian Gulf

Countries including Algeria, The Netherlands, France, Denmark, United Kingdom, Finland, Belgium, Australia and United States have the most MVNOs. In these countries the MVNO marketplace is stabilizing and there are some well-known MVNOs which are highly successful. Other countries, such as Portugal, Spain, Italy, Croatia, the Baltic States, India, Chile, Austria, and Oman are either recently launched the MVNO or in the process of launching MVNO operations. Share of MVNOs in mobile market in world, West Europe and North America, and rest of the world is given in Fig. 1. In next three year growth of MVNOs in rest of the world will be more in comparison to Western Europe and North America as can be seen from Fig. 1.

### MVNOs in Oman:

**The beginning:** Oman's Telecommunications Regulatory Authority (TRA) issued five class two licenses (MVNO licenses), allowing the resale of basic mobile services on 28th June, 2008. These MVNOs are Friendi Mobile, Injaz International, Kalam Telecommunications (later on it has backed out and its license was awarded to an Omani company, Samatel), Majan Telecom, and Mazoon Mobile. The Class two licenses as defined in the context of Oman

Table 2: Status check of MVNOs in Oman-September 2010

	Majan	FriENDi	Mazon mobile	Injaz international	Samatel
Agreement with host operator	Yes	Yes	Yes	Yes	Yes
Launch preparations	Yes	Yes	Yes	Yes	Yes
Date of launch	6 <sup>th</sup> May 2009	26 <sup>th</sup> April 2009	21 <sup>st</sup> November 2009	May 2010	August 23, 2010 (Press Release, 2010a)
Brand	Renna			Apna Mobile	NA
MNO partner	Oman Mobile	Oman Mobile	Nawras	Nawras	Nawras

are required to sign “a commercial agreement with one of the existing MVNOs, i.e., Oman Mobile or Nawras, whereby the licensees are permitted to resell basic mobile services having bought airtime from the network operators in bulk. The services offered by the resellers can then be rebranded and offered to subscribers at local rates”.

The cost of each license is OR 2,500 (US\$6,500). Licenses are for a period of five years but are extendable. It is also mentioned in the news that a sixth license was awarded in October, 2008 to an un-identified company but not many details are available (News, 2008). These MVNO operators have to buy minutes in wholesale from existing two Class-I operators, i.e., Oman Mobile Telecommunication Company and Omani Qatari telecommunication company (Nawras). Resellers have the option of programming and issuing their own branded SIMs or relying on the host operators to provide their programmed SIMs. Additionally, the licensees can independently recharge the products and services they distribute by utilizing the infrastructure of the host operator. Billing and invoicing may also be independently handled by the MVNO licensee or by the host operator. "Under the license terms, the new firms are obliged to earmark a minimum of 65% of all jobs for Oman citizens during the first year of operation. They must also set up a contact/call centre to respond to customer queries and complaints (BI-ME, 2008).

**Present status:** The total population of Oman is 3,418,085 with an area of 212,460 (km<sup>2</sup>) as on 6th March, 2010 (<http://www.countryreports.org/Oman.aspx>). The present mobile user’s penetration rate is 147%. Monthly statistics of mobile subscribers (pre-paid and post paid segment along with their share in percentage) in Oman is given in Table 3 and trends are shown in Fig. 2 and 3. It is evident from the data that growth of mobile subscribers is more in pre-paid segment (the segment of MVNO’s operations) in comparison to post paid segment.

All the five MVNOs or Resellers MVNOs have launched their services in Oman (Fig. 4). The present status of various activities of five MVNOs in OMAN is summarized in Table 2 as of September 2010.

Monthly and quarterly statistics of market share of MNOs and MVNOs are presented in Table 4 and 5, respectively. If these statistics is taken as a measure of success of MVNOs in Oman then it is a success at present. The share of MVNOs is approximately 7.2% in the short span. The growth rate in the last three quarters is varying from 20 to 48%.

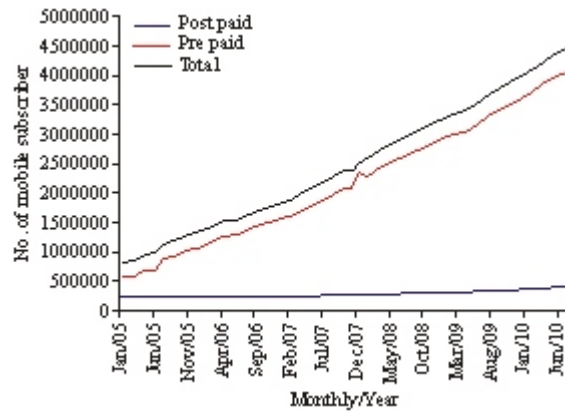


Fig. 2: Growth of Post and Pre-Paid mobile subscribers in Oman

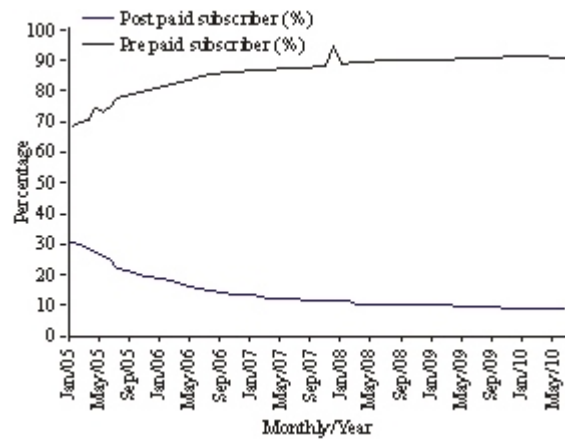


Fig. 3: Percentage of market share Post and Pre-Paid mobile subscribers in Oman

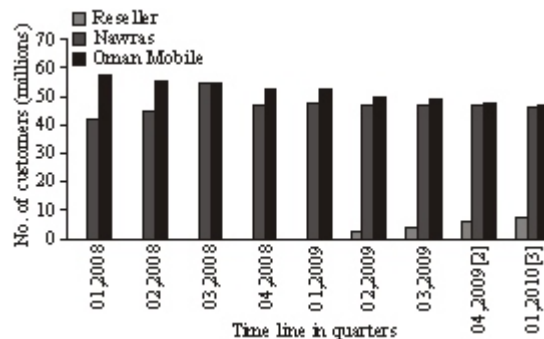


Fig. 4: Market share of MNO and MVNOs in Oman

Table 3: Number of pre-paid and Post mobile subscribers in Oman

S.No.	Year/Month	No. of subscribers		
		Post paid (%)	Pre paid (%)	Total
1	January, 2005	258160 (30.81)	579696 (69.18)	837856
2	February, 2005	255510 (29.98)	596489 (70.01)	851999
3	March, 2005	257531 (29.51)	615218 (70.50)	872659
4	April, 2005	258636 (27.56)	697668 (74.35)	938304
5	May, 2005	254838 (26.39)	710685 (73.61)	965523
6	June, 2005	251745 (25.25)	745144 (74.75)	996889
7	July, 2005	248856 (22.08)	878106 (77.92)	1126962
8	August, 2005	253656 (21.56)	922527 (78.43)	1176183
9	September, 2005	252866 (20.77)	964104 (79.22)	1216970
10	October, 2005	252751 (20.06)	1006904 (79.93)	1259655
11	November, 2005	253217 (19.34)	1049683 (80.18)	1309200
12	December, 2005	253112 (18.98)	1080113 (81.02)	1333225
13	January, 2006	254785 (18.58)	1116797 (81.42)	1371582
14	February, 2006	257002 (18.23)	1155018 (81.92)	1410020
15	March, 2006	256092 (17.52)	1205550 (82.48)	1461642
16	April, 2006	249658 (16.43)	1269909 (83.57)	1519560
17	May, 2006	246304 (16.06)	1287635 (83.94)	1533939
18	June, 2006	240707 (15.39)	1323186 (84.61)	1563893
19	July, 2006	241939 (15.04)	1366728 (84.96)	1608667
20	August, 2006	242536 (14.66)	1412023 (85.34)	1654559
21	September, 2006	243607 (14.36)	1452446 (85.64)	1696053
22	October, 2006	244923 (14.06)	1497478 (85.94)	1742401
23	November, 2006	247053 (13.85)	1536833 (86.15)	1783886
24	December, 2006	246117 (13.54)	1571907 (86.46)	1818024
25	January, 2007	257511 (13.89)	1607067 (86.70)	1854578
26	February, 2007	246255 (13.04)	1641540 (86.96)	1887795
27	March, 2007	252770 (12.90)	1707283 (87.10)	1960053
28	April, 2007	260515 (12.86)	1765786 (87.15)	2026301
29	May, 2007	263701 (12.75)	1803946 (87.25)	2067647
30	June, 2007	267020 (12.50)	1868519 (87.50)	2135539
31	July, 2007	271089 (12.33)	1927837 (87.67)	2198926
32	August, 2007	271903 (11.95)	2003536 (88.05)	2275439
33	September, 2007	276978 (11.88)	2054503 (88.12)	2331481
34	October, 2007	281727 (11.82)	2101919 (88.18)	2383646
35	November, 2007	281488 (11.89)	2088253 (88.11)	2369741
36	December, 2007	293622 (11.75)	2369741 (88.25)	2500000
37	January, 2008	296688 (11.51)	2280814 (88.49)	2577502
38	February, 2008	297300 (11.31)	2331455 (88.69)	2628755
39	March, 2008	292894 (10.72)	2438057 (89.27)	2730951
40	April, 2008	296988 (10.68)	2482110 (89.31)	2779098
41	May, 2008	300346 (10.60)	2532740 (89.40)	2833086
42	June, 2008	304838 (10.55)	2582530 (89.44)	2887368
43	July, 2008	308729 (10.47)	2641256 (89.53)	2949985
44	August, 2008	311844 (10.31)	2712876 (89.69)	3024720
45	September, 2008	316441 (10.26)	2768500 (89.74)	3084941
46	October, 2008	317682 (10.25)	2808433 (89.83)	3126115
47	November, 2008	321669 (10.16)	2844713 (89.84)	3166382
48	December, 2008	324812 (10.09)	2894537 (89.91)	3219349
49	January, 2009	328194 (10.50)	2937162 (89.94)	3265356
50	February, 2009	330552 (9.97)	2984298 (90.03)	3314850
51	March, 2009	333682 (9.45)	3021464 (90.05)	3355145
52	April, 2009	332198 (9.79)	3060774 (90.21)	3392972
53	May, 2009	334454 (9.61)	3146093 (90.39)	3480547
54	June, 2009	337926 (9.49)	3224639 (90.51)	3562565
55	July, 2009	340149 (9.33)	3305610 (90.67)	3645759
56	August, 2009	343366 (9.25)	3370600 (90.75)	3713966
57	September, 2009	347626 (9.20)	3431311 (90.80)	3778937
58	October, 2009	351874 (9.19)	3477426 (90.81)	3829300
59	November, 2009	355804 (9.10)	3553296 (90.90)	3909100
60	December, 2009	358744 (9.05)	3605922 (90.95)	3964666
61	January, 2010	360861 (8.94)	3676527 (91.06)	4037388
62	February, 2010	364704 (8.83)	3767218 (91.17)	4131922
63	March, 2010	369567 (8.77)	3844242 (91.23)	4213809
64	April, 2010	378283 (8.82)	3908728 (91.18)	4287011
65	May, 2010	390039 (8.98)	3954278 (91.02)	4344317
66	June, 2010	398130 (9.06)	3995945 (90.94)	4394075
67	July, 2010	403599 (9.05)	4053727 (90.95)	4457286

Source: <http://tra.gov.om>.

Table 4: Market share for mobile service providers (Pre-paid)

Year	Reseller	Operators	Total
Q1,2010			
Jan	254,365 (6.91)	3,422,162(93.08)	3,676,527
Feb	282,750 (8.36) [11.16]	3,484,468(91.63) [1.82]	3,376,218
March	300,907(7.85) [6.42]	3,543,335(92.12) [1.69]	3,844,242
Q2,2010			
April	318,234(8.14) [5.76]	3,590,494(91.86) [1.33]	3,908,728
May	328,050(11.10) [3.08]	3,626,228(88.90) [1.00]	3,954,278
June	351,597(8.79) [7.18]	3,644,348(91.20) [0.50]	3,995,945
Q3,2010			
July	362,223(8.94) [3.02]	3,691,504(91.06) [1.29]	4,053,727

Source: <http://www.tra.gov.om>

The data within ( ) indicates percent share and data within [ ] indicates growth in % age over the previous month.

Table 5: Market share for mobile service providers

Year	Reseller	Nawras	Oman Mobile
Q1, 2008	-	42.5	57.5
Q2, 2008	-	44.5 [4.70]	55.5 [-3.48]
Q3, 2008	-	45.7 [2.69]	54.3 [-2.16]
Q4, 2008	-	46.9 [2.63]	53.1 [-2.21]
Q1, 2009	-	47.5 [1.28]	52.5 [-1.13]
Q2, 2009	3.0	47.0 [-1.05]	50.0 [-4.76]
Q3, 2009	4.0 [33.33]	47.0 [0.0]	49.0 [-2.00]
Q4, 2009	5.9 [47.50]	46.9 [-0.21]	47.1 [-3.88]
Q1,2010	7.1[20.34]	46.0 [-1.92]	46.9 [-0.42]

Source: <http://www.tra.gov.om>

The data within [ ] indicates growth over previous quarter

**Prediction and constraints of the MVNO market:**

Many experts have commented about the future of the MVNO market in Oman. The size of the mobile user population is small in Oman but mobile penetration is estimated at 147%. The two licensed network operators (MNO) have deployed their telecom network and services very effectively. These two factors bring uncertainty about the prospects of the five resellers future in the market (Comm, 2008; Singh, 2010a).

As a benchmark, it is reported by the experts that a base of at least 100,000 subscribers is necessary for an MVNO/reseller to achieve the economies of scale necessary to sustain a viable business. According to Mazoon chief executive's statement, an MVNO will survive in the Omani market if it can gain between 3-10% of the market, which would be as much as 288,000 subscribers. It means five MVNOs together need to capture 15-50% of the market. The requirement of this number will make competition very tough in the Omani mobile market for five resellers. The relations of two MNOs in allocating spectrum to five MVNOs will be another major issue in Oman's MVNO market (Bevir, 2009).

As of now their utility to MNOs is very high. It is evident from the statement "The Oman Mobile (Omantel) reported that in Q1 2010 57% of its net additions in the

last 12 months came from its new MVNO partners (Groves, 2010)". This can be taken as a proof of success of MVNOs in Oman

**Analysis of MVNO strategies, tariff model:**

**Majan (Renna) telecommunication LLC (<http://www.majantelecom.com/>):**

**Major strategies:** Majan telecommunication LLC, Oman, is one of the five companies that have been given a MVNO license by Omani Telecom Regulatory Authority (TRA). It was the first MVNO to start its operations in Oman. Its brand is known as Renna. It has tied up with many international and Omani players who have set up a distribution network. It is using incumbent operator Oman Mobile network for providing services (Roger, 2008b), and Telegeography (2009a). As a part of its strategy, it plans to penetrate in the under-served market segment of the customers by offering differentiated services. It has its own tariff plans, marketing and sales channels. Majan has tied up with 390 operators across the world to launch its SMS and roaming services in more than 190 countries (Oman Daily Observer, 2010). It has set up a call center to serve customers better. It is also providing special value added services such as Call Me Back, Credit Warning, Credit Transfer, and Credit In Advance (Press Release, 2009c).

**Tariff plans:** It started with two innovative tariff plans. It claims that there are no monthly or hidden fees.

- **Renna 6-6** is a classic peak/off-peak price plan that provides customers with an extra low tariff of 38bz/min from 6 pm to 6 am.
- **Renna 24/7** is a 'flat rate' price plan that offers the same low price day and night. It is designed to suit customers who make most calls during the day (Press Release, 2009c). In addition, it allows customers to select 3 preferred international numbers to call at special discounted prices. Presently it is increased to 6 (3 preferred national and 3 preferred international) with 25% discount.

The details of its international tariff for select countries are given in Table 6, national tariff in Table 11, and SMS tariff (national and international) in Table 12. It is evident from the tariff given in Table 6 that it has divided the international tariff in to 9 zones. It has different tariff for peak hours (Saturday-Thursday from 6.00 AM to 8.00 PM) and off-peak hours and also for different categories of the countries. During September 2010, national call rate are reduced to 32 and 28 Bz/M for peak and off peak hours (Saturday-Thursday 8.00 pm to 6.00 am and Friday throughout). The total number of countries of its operations is 237.

Table 6: Majan/renna mobile international tariff for different countries

Zone	No.	Country(240)	Peak	Off-peak
Zone-7	46	Afghanistan , Andorra, Ascension, Bequia, Bosnia and Herzegovina, Botswana, British Virgin Islands, Bulgaria, Cameroon, Falkland ISL, Fiji Islands, French Polynesia, Ghana, Gibraltar, Haiti, Hawaii , Kazakhstan , Korea North , Laos, Macao, Madagascar , Malagasy , Malawi, Maldives, Mexico, Montenegro , Myanmar , New Caledonia, Nicaragua, Papua New Guinea, Reunion, Romania, Saipan , Samoa , Serbia and Montenegro, Slovakia, St Helena, Tajikistan, Tobago , Trinidad and Tobago, Tuvalu, Ellice Is, Vanuatu, Western Samoa , Yugoslavia , Zambia, Zimbabwe	0.350	0.300
Zone-6	61	Albania, Anguilla, Antigua and Barbuda, Armenia, Barbados, Belarus, Belize, Bermuda, Bhutan, Brunei Darussalam, Burundi, Cayman Islands, Chile, Colombia, Czech Republic, Ecuador, French Guiana, Grenada/Carricou, Guam, Guinea, Guyana, Honduras, Hong Kong, Iceland, Indonesia, Israel, Jamaica, Kenya, Kyrgyz Republic, Latvia, Lesotho, Liechtenstein, Luxembourg, Macedonia, Malta, Mauritius, Montserrat, Mozambique, Namibia, Niger, Nigeria, Northern Marianas, Paraguay, Peru, Poland, Russia, San Marino, Seychelles, Sierra Leone, St Kitts and Nevis, St Lucia, St Vincent and the Grenadines, Suriname, Swaziland, Taiwan, Thailand, Turks and Caicos, Uganda, Cayman ISL, Korea South , Ukraine	0.300	0.235
Zone-3	19	Algeria, Djibouti, Egypt, Eritrea, Iraq, India, Jordan, Lebanon, Libya, Mauritania, Morocco, Palestine, Somalia, Sudan, Syria, Tunisia, United States, Yemen, USA without Alaska	0.200	0.175
Zone-8	56	American Samoa, Bahamas, Benin, Burkina Faso, Cape Verde, Central African Republic, Chad, China, Congo , Cook Islands, Costa Rica, Cuba, Diego-Garcia, Dominican Republic, East Timor, El Salvador, Equatorial Guinea, Ethiopia, Faroe Islands, French Antilles (Guadeloupe, etc.), Gabonese Republic, Gambia, Greenland, Guatemala, Guinea-Bissau, Kiribati, Gilbert Is, Liberia, Mali, Marshall Islands, Martinique, Mongolia, Nauru, Nepal, Netherlands Antilles, Niue Island, Palau, Panama, Puerto Rico, Rwanda, Sao Tome and Principe, Senegal, Solomon Islands, St Pierre and Miquelon, Togolese Republic, Tonga, Turkmenistan, U.S. Virgin Islands, Uzbekistan, Vietnam, Wallis and Futuna, Dominican REP, Futunan , Kampuchea , Norfolk ISL	0.425	0.350
Zone-5(a)	37	Angola, Argentina, Aruba, Azerbaijan, Bolivia, Brazil, Canada, Comoros and Mayotte, Cote d'Ivoire(Ivory Coast), Croatia, Cyprus, Denmark, Estonia, Finland, France, Georgia, Germany, Greece, Hungary, Ireland, Japan, Lithuania, Moldova, Monaco, New Zealand, Norway, Philippines, Portugal, Singapore, Slovenia, South Africa, Sweden, Switzerland, Tanzania, Turkey, Uruguay	0.250	0.200
Zone-5(b+c)	4	Australia, France, Malaysia, Netherlands	0.239	0.193
Zone-4(b+c+d)	9	Austria, Bangladesh, Belgium, Iran, Italy, Pakistan, Spain, Sri Lanka, United Kingdom,	0.225	0.190
Zone-2	4	Bahrain, Kuwait, Saudi Arabia, Qatar	0.170	0.120
Zone-1	1	UAE	0.170	0.105
Total	237			

Source: [http://www.rennamobile.com/GetStarted\\_Content.aspx?Page=InterCalls](http://www.rennamobile.com/GetStarted_Content.aspx?Page=InterCalls)

**SIM card and recharge management:** Renna SIM cards, with an entirely new number series, are available at over 250 outlets across the Sultanate including dealers managed by some of the best and most experienced distributors and retail brands in Oman (Press Release, 2009c). According to its website, one can buy its products at Renna shops (Dhofar Building and KM Trading in Ruwi plus at Renna's Head Office in Athaiba and Rameez in Seeb) and hundreds of other dealers all over Oman. It provides online support to customers from Renna phone, free of charge. As a part of its marketing strategy it offers extra credit. During March 2010 it offered 10 and 20% extra credit on 3 Rial and 7 Rial recharges. If customer recharge online, an extra 10% talk time is given as bonus.

**Injaz (Apna Mobile) International Telecom LLC (www.injaz.com):**

**Major strategies:** It has received license on June 21, 2008. It has signed a strategic partnership agreement with MNO Nawras to launch mobile services over the network of Nawras (Editor, 2010). Its partnership agreement was completed on 9th January 2010. Earlier, Times of

Oman (2008) reported that Injaz International telecom will adopt a service-oriented and customer-driven strategy. It dreams to become the most preferred 'enhanced mobile service provider' in Oman. It will target individual and enterprise customers. It will develop novel and affordable products and services that are competitive and world-class.

It has launched the first ever mobile phone service designed and aimed exclusively at the Sultanate's Indian population. The new mobile phone service named "Apna Mobile". It is unique as it is the first mobile brand exclusively dedicated to the large Indian community in Oman. Apna Mobile is offering unprecedented value for money, free calls to India as well as content and exclusive value-added services designed specifically for Indians (OER, 2010).

**Tariff plan:** The details of its international tariff for different countries of its present operations are given in Table 7, national tariff in Table 11, and SMS tariff (national and international) in Table 12. It is evident from the tariff given in Table 7 that it has divided the international tariff in to 8 zones with India in to separate

Table 7: Injaz/apna mobile international tariff for different countries

Zone	No. of countries	Name of countries	Peak	Off Peak
	1	India	0.189	0.089
Zone-1	1	United Arab Emirates	0.169	0.099
Zone-2	4	Bahrain, Kuwait, Qatar, Saudi Arabia	0.169	0.119
Zone-3	1	7United States, Algeria, Yemen, Djibouti, Egypt, Eritrea, Iraq, Jordan, Lebanon, Libya, Mauritania, Morocco, Palestine, Somalia, Sudan, Syria, Tunisia	0.199	0.169
Zone-4	10	India, Bangladesh, Pakistan, Austria, Belgium, Iran, Italy, Spain, Sri Lanka, Vatican City, United Kingdom	0.219	0.189
Zone-5	41	Angola, Argentina, Aruba, Azerbaijan, Bolivia, Brazil, Canada, Comoros and Mayotte, Cote d'Ivoire (Ivory Coast), Croatia, Cyprus, Denmark, Estonia, Finland, Georgia, Germany, Greece, Hungary, Ireland, Japan, Lithuania, Moldova, Monaco, New Zealand, Norway, Philippines, Portugal, Singapore, Slovenia, South Africa, South Korea, Sweden, Switzerland, Tanzania, Turkey, Uruguay, Malaysia, Australia, Australian External Territories, France, Netherlands	0.249	0.199
Zone-6	61	Albania, Anguilla, Antigua and Barbuda, Armenia, Barbados, Belarus, Belize, Bermuda, Bhutan, Brunei Darussalam, Burundi, Cayman Islands, Chile, Colombia, Czech Republic, Dominica, Ecuador, French Guiana, Grenada/Carricou, Guam, Guinea, Guyana, Honduras, Hong Kong, Iceland, Indonesia, Israel, Jamaica, Kazakhstan, Kenya, Kyrgyz Republic, Latvia, Lesotho, Liechtenstein, Luxembourg, Macedonia, Malta, Mauritius, Montserrat, Mozambique, Namibia, Niger, Nigeria, Northern Marianas, Paraguay, Peru, Poland, Russia, San Marino, Seychelles, Sierra Leone, St Kitts and Nevis, St Lucia, St Vincent and the Grenadines, Suriname, Swaziland, Taiwan, Thailand, Turks and Caicos, Uganda, Zimbabwe	0.299	0.229
Zone-7	33	Andorra, Ascension, Bosnia and Herzegovina, Botswana, British Virgin Islands, Bulgaria, Burma (Myanmar), Cameroon, Fiji Islands, French Polynesia, Ghana, Gibraltar, Haiti, Laos, Macao, Malawi, Maldives, Mexico, New Caledonia, Nicaragua, North Korea, Papua New Guinea, Reunion, Romania, Serbia and Montenegro, Slovakia, St Helena, Tajikistan, Trinidad and Tobago, Tuvalu, Ellice Is, Ukraine, Vanuatu, Zambia	0.349	0.299
Zone-8	64	Afghanistan, American Samoa, Bahamas, Benin, Burkina Faso, Cambodia, Cape Verde, Central African Republic, Chad, China, Congo (Brazzaville), Congo (Kinshasa, formerly Zaire), Cook Islands, Costa Rica, Cuba, Diego-Garcia, Dominican Republic, East Timor, El Salvador, Equatorial Guinea, Ethiopia, European Telephony Numbering Space, Faroe Islands, French Antilles (Guadeloupe, etc.), Gabonese Republic, Gambia, Global Mobile Satellite System, Greenland, Guatemala, Guinea-Bissau, International Networks, International Premium Rate Service, ITPCS trials, Kiribati, Gilbert Is, Liberia, Madagascar, Mali, Marshall Islands, Martinique, Micronesia, Mongolia, Nauru, Nepal, Netherlands Antilles, Niue Island, Palau, Panama, Puerto Rico, Rwanda, Samoa, Sao Tome and Principe, Senegal, Shared Cost Services, Solomon Islands, St Pierre and Miquelon, Togolese Republic, Tokelau, Tonga, Turkmenistan, U.S. Virgin Islands, Uzbekistan, Vietnam, Wallis and Futuna	0.419	0.349
	232	Source: <a href="http://apnamobile.com/apnaoffer/apna-international-tariffs.html">http://apnamobile.com/apnaoffer/apna-international-tariffs.html</a>		

zone. It's off peak tariff is minimum for India as part of its strategy. It has different tariff for peak hours and off-peak hours and also for different categories of the countries like the other MVNOs. Its tariff for national is same for its own mobile customers and customers of other mobile service providers. Its network provides calls to 232 countries.

**SIM card and recharge management:** It aims to provide the Omani market with innovative products and services supported by its sister company Al Makhah, the largest distribution channel of SIM cards in Oman (Telegeography, 2010). It also created a network of Apna Mobile dealers. Its recharge is available in 5 different values varying from 500 BZ to 5 RO. Its validity increases with its value. The range is from one month to 5 months.

**FRiENDi mobile** ([www.friendimobile.com](http://www.friendimobile.com)):

**Major strategies:** It is the third MVNO in Oman to start its activities at the end of 2008 (Roger (2008a)). It gets its

license through Arab Link (Nicole, 2008). It uses the network of Oman Mobile. It is also known as Connect Arabia. On 5th March, 2009 FRiENDi Mobile has become the first ever Mobile Reseller/Mobile Virtual Network Operator (MVNO) in the Samena region (South Asia, Middle East and North Africa) to make a mobile telephone call using its own technical platform. The call was between the Chairman and CEO of the Friendi (Press Release, 2009a). As per its marketing strategy Friendi is providing customers with an option to get a mobile number which is easy to remember. It may be the customer's birthday, lucky number, favorite footballer number, parts of the existing mobile number, or any special number.

The free of charge registration is a simple procedure. For ease and convenience, Friendi Mobile has provided two ways of pre-booking the number. Customers can log on to the Friendi Mobile website from home, work or any internet cafe and book their number online anytime or they can visit outlets of Friendi such as (a) Lulu Hypermarkets (Darsait, Bausher, Salalah and Sohar),

Table 8: Friendi mobile international tariff for different counties

Zone	No.	Countries (232)	Off-peak			Peak		
			1 <sup>st</sup> min	2 <sup>nd</sup> min	3 <sup>rd</sup> min onward	1 <sup>st</sup> min	2 <sup>nd</sup> min	3 <sup>rd</sup> min onward
Zone-4(a)	2	India, India (Idea Kerala)	0.095	0.092	0.089	0.160	0.158	0.156
Zone-4(b)	3	Pakistan, Bangladesh, Bangladesh (Robi)	0.095	0.092	0.089	0.180	0.178	0.176
Zone-3(a)	1	USA	0.132	0.131	0.129	0.152	0.150	0.148
Zone-6	58	Indonesia, Albania, Antigua, Anguilla, Armenia, Belize, Barbados, Belarus, Bermuda, Bhutan, Brunei, Burundi, Cayman, Chile, Colombia, Czech Rep, Ecuador, Dominica ISL, French Guiana, Grenada, Guam, Guyana, Guinea, Swaziland, Suriname, St. Vincent, St. Lucia, St. Kitts & Nevis, Sierra Leone, Seychelles, San Marino, Russia, Poland, Peru, Paraguay, Nigeria, Namibia, Mozambique, Montserrat, Mauritius, Malta, Macedonia, Luxembourg, Liechtenstein, Lesotho, Latvia, Kyrgyzstan, Kenya, Jamaica, Israel- Barak, Iceland, Hongkong, Honduras, Zimbabwe, Uganda, Turks & Caicos ISL, Thailand, Taiwan	0.188	0.183	0.179	0.240	0.238	0.236
Zone-5(a)	37	Philippines, Philippines (globe), Azerbaijan, Angola, Argentina, Aruba, Bolivia, Brazil, Canada, Denmark, Comoros ISL, Cote D'Ivoire, Croatia, Cyprus, Estonia, Finland, Georgia, Germany, Switzerland, Slovenia, Sweden, South Africa, Portugal, Philippines, Norway, New Zealand, Monaco, Moldavia, Lithuania, Korea South, Japan, Ireland, Hungary, Venezuela, Uruguay, Turkey, Tanzania	0.160	0.155	0.149	0.200	0.198	0.196
Zone-4(c)	6	Sri Lanka, Sri Lanka (Dialog), Austria, Belgium, Spain, Italy	0.152	0.147	0.139	0.180	0.178	0.176
Zone-4(d)	1	UK	0.152	0.151	0.149	0.180	0.178	0.176
Zone-3(b)	19	Egypt, Algeria, Djibouti, Eritrea, Eritrea, Haiti, Syria, Sudan, Somalia, Palestine, Morocco, Mauritania, Libya, Lebanon, Jordan, Iraq, Yemen, USA -Alaska, Tunisia	0.140	0.135	0.129	0.160	0.158	0.156
Zone-1	1	UAE	0.085	0.082	0.079	0.136	0.134	0.132
Zone-2	4	Saudi Arabia, Bahrain, Qatar, Kuwait	0.096	0.094	0.089	0.136	0.134	0.132
Zone-8	54	Afghanistan, Burkina FASO, central African Rep., Chad, Congo, Cook ISL, Costa Rica, Cuba, Diego Garcia, El Salvador, Dominican Rep, Equatorial Guinea American Samoa, Benin, Bahamas, Cape Verde ISL, China, El Salvador, Faeroe Islands, Gabon, Ethiopia, French Antilles, Gambia, Nepal, Nauru ISL, Greenland, Guadeloupe ISL, Guatemala, Guinea Bissau, ST. Pierre & Miquelon, Solomon ISL, Rwanda, Senegal, Sao Tome, Puerto Rico, Panama, Palau, Norfolk ISL, Niue ISL, Netherlands Antilles, Mongolia, Micronesia, Marshall ISL, Liberia, Kiribati, Kampuchea, Zaire, Wallis & Fortuna, Vietnam, Uzbekistan, US.	0.280	0.275	0.278	0.340	0.338	0.336
Zone-7	43	Virgin ISL, Turkmenistan, Tonga, Togo Rep, Timor Andorra, Ascension ISL, Bequia, Bosnia, Botswana, Br. Virgin ISL, Bulgaria, Cameroon, Falkland ISL, Fiji ISL, French, St. Helena, Polynesia, Ghana, Gibraltar, Tajikistan, Slovak Rep, Saipan, Romania, Reunion ISL, Papua New Guinea, Nicaragua, New Caledonia, Myanmar, Mexico- Telmex, Mali, Maldives ISL, Malawi, Malagasy, Madagascar, Macao, Laos, Korea North, Kazakhstan, Hawaii, Zambia, Yugoslavia, Western Samoa, Vanuatu, Ukraine, Tuvalu, Trinidad & Tobago, Tajikistan	0.240	0.235	0.230	0.280	0.278	0.276
Zone-5(b)	3	Australia, France, Netherlands	0.154	0.152	0.149	0.191	0.189	0.187
	232	Source: <a href="http://www.friendimobile.com/Pages/ContentPage2.aspx?PageId=13">http://www.friendimobile.com/Pages/ContentPage2.aspx?PageId=13</a>						

(b) Muscat City Centre, (c) KM Trading, (d) City Cinema (Al Nasr) and Star Cinema, Ruwi, (e) City Cinema, Shatti or Friendi promoters for help (Press Release, 2009b).

It has launched its services in April, 2009. However, it was an earlier plan to start its services by the end of 2008 (Khaleej Times, 2009). It will provide only pre-paid



Table 9: Samatel mobile international tariff for different countries

Zone	No.	Countries	Peak	Off Peak
Zone-1	1	United Arab Emirates	0.168	0.098
Zone-	2	4Bahrain, Kuwait, Qatar, Saudi Arabia	0.168	0.118
Zone-3	17	Algeria, Djibouti, Egypt, Eritrea, Iraq, Jordan, Lebanon, Libya, Mauritania, Morocco, Palestine, Somalia, Sudan, Syria, Tunisia, United States, Yemen	0.198	0.168
Zone-4	8	Austria, Belgium, Iran, Italy, Spain, Sri Lanka, United Kingdom, Vatican City	0.218	0.188
Zone-5	43	Angola, Argentina, Aruba, Australia, Australian External Territories, Azerbaijan, Bolivia, Brazil, Canada, Comoros and Mayotte, Cote d'Ivoire (Ivory Coast), Croatia, Cyprus, Denmark, Estonia, Finland, France, Georgia, Germany, Greece, Hungary, Ireland, Japan, Lithuania, Malaysia, Moldova, Monaco, Netherlands, New Zealand, Norway, Philippines, Portugal, Singapore, Slovenia, South Africa, South Korea, Sweden, Switzerland, Tanzania, Turkey, Uruguay, Venezuela.	0.248	0.198
Zone-6	62	Albania, Anguilla, Antigua and Barbuda, Armenia, Barbados, Belarus, Belize, Bermuda, Bhutan, Brunei Darussalm, Burundi, Cayman Islands, Chile, Colombia, Czech Republic, Dominica, Ecuador, French Guiana, Grenada/Carricou, Guam, Guinea, Guyana, Honduras, Hong Kong, Iceland, Indonesia, Jamaica, Kazakistan, Kenya, Kyrgyz Republic, Latvia, Lesotho, Liechtenstein, Luxembourg, Macedonia, Malta, Mauritius, Montserrat, Mozambique, Namibia, Niger, Nigeria, Northern Marianas, Paraguay, Peru, Poland, Russia, San Marino, Seychelles, Sierra Leone, St Kitts and Nevis, St Lucia, St Vincent and the Grenadines, Suriname, Swaziland, Taiwan, Thailand, Turks and Caicos, Uganda, Zimbabwe	0.298	0.228
Zone-7	35	Andorra, Ascension, Bosnia and Hercegovina, Botswana, British Virgin Islands, Bulgaria, Burma (Myanmar), Cameroon, Fiji Islands, French Polynesia, Ghana, Gibraltar, Haiti, Laos, Macao, Malawi, Maldives, Mexico, New Caledonia, Nicaragua, North Korea, Papua New Guinea, Reunion, Romania, Serbia, Montenegro, Slovakia, St Helena, Tajikistan, Trinidad and Tobago, Tuvalu, Ellice Is, Ukraine, Vanuatu, Zambia	0.348	0.298
Zone-8	62	Afghanistan, American Samoa, Bahamas, Benin, Burkina Faso, Cambodia, Cape Verde, Central African Republic, Chad, China, Congo (Brazzaville), Congo (Kinshasa, formerly Zaire), Cook Islands, Costa Rica, Cuba, Diego-Garcia, Dominican Republic, East Timor, El Salvador, Equatorial Guinea, Ethiopia, Faroe Islands, French Antilles (Guadeloupe, etc.), Gabonese Republic, Gambia, Global Mobile Satellite System, Greenland, Guatemala, Guinea-Bissau, International Premium Rate Service, Kiribati Gilbert Is, Liberia, Madagascar, Mali, Marshall Islands, Martinique, Micronesia, Mongolia, Nauru, Nepal, Netherlands Antilles, Niue Island, Palau, Panama, Puerto Rico, Rwanda, Samoa, Sao Tome and Principe, Senegal, Solomon Islands, St Pierre and Miquelon, Togolese Republic, Tokelau, Tonga, Turkmenistan, U.S. Virgin Islands, Uzbekistan, Vietnam, Wallis and Futuna	0.418	0.348

Source: <http://www.samatel.om/tarif.html>

services to begin with. FRIENDi is also planning to target 600,000 Indians living in Oman with low tariff plans. It is targeting specifically Indians from Kerala who are 50% of the Indian population in Oman. In collaboration with parent company Arabia Connect, FRIENDi will also target youth population in Oman. FRIENDi business looks successful since it could attract two new investor in the form of Oman based Dolphin International LLC and ePlanet Ventures (Thomas, 2009). It has acquired 160,000 customers in first year of its operations. Its philosophy is to empower people from multi-cultural backgrounds to stay connected to their friends locally and internationally. It has planned an Reach Out Program. The first phase of its Reach Out programme was the launch of a partnership between Friendi Group and Idea Cellular of India for its subscribers from Kerala state of India (Comm, 2009).

**Tariff plans:** The details of its international tariff for the countries of its present operations are given in Table 8, national tariff in Table 11, and SMS tariff (national) in Table 12. It is evident from the tariff given in Table 8 that it has divided the international tariff in to 9 zones. A separate zone is for India. It's off peak tariff is minimum for India, Pakistan, and Bangladesh as part of its strategy. It has different tariff for peak hours and off-peak hours

and also for different categories of the countries like the other MVNOs. Its tariff varies with usage, i.e., from first minute to 3rd min. Its customers can call to 232 countries.

**SIM card and recharge management** (<http://comm.ae/2009/08/27/mindset-shift/>): FRIENDi mobile has over 1,500 points of sale, excellent call quality, international roaming in over 100 countries and a multi-lingual customer service team offering support across six languages including Hindi Arabic, English, Malayalam, Urdu, and Bengali (Press Release, 2010a).

**Samatel** ([www.samatel.om](http://www.samatel.om)):

**Major strategies:** Samatel was founded in 2009 after backing out of Kalaam telecommunications. It has about 120 employees. It has launched its services for residential and business users on August 23, 2010 (Middleton, 2010). It will target untapped and underserved markets and SMEs (Trivikram, 2010). Samatel is first Middle Eastern MVNO to make use of highly efficient operating and technology platform provided by Effortel, the Mobile Virtual Network Enabler (MVNE) (Press Release, 2010b). It will carry an innovative and potentially disruptive customer-service focused on its wireless sector experience in Oman and Yemen. It is hoping to change the perception

of consumer about mobile services and operators. It will un-bundle services and will transform the services in to a new format. The end-user will have control over the format. The customer will decide what they wish to utilize and will pay accordingly. The company will target the pre-paid and underserved customer segment in Oman. It will also set up a largest contact/call centers in Oman with a view to attracting outsourced businesses as well as serving its own customers (Oman Economic Review, 2009). According to Sever (2010), Samatel will set up a call centre with staff strength of 500 employees at Mabela within three to four months. In addition it will also open a call/contact center in Bid Bid, which will have a capacity of 300 to 400 call agents and will be operational within a year. The fundamental of Samatel are simplicity and transparency.

Samatel has been selected as a finalist in Telecoms World Awards Middle East in the 'Customer Strategy' and 'Best MVNO' category (Staff Reporter, 2010).

**Tariff plan:** The international tariff plan of Samatel Mobile is given in Table 9. Tariff rates are divided in 8 Zones. The tariff varies from 0.168 RO for Zone-1 to 0.418 RO for Zone-8. In addition, there are special tariff rates (98 Bz/Minutes) for India, Pakistan, and Bangladesh which is not included in the 8 zones. The national tariff rates and rates for SMS are given in Table 11 and 12. The national tariff is less for Samatel to Samatel communication in comparison to Samatel to customer of other service providers but SMS tariff is same for all.

**SIM card and recharge management:** Samatel Mobile SIM cards are available at Muscat Airport, Wajaja Border and Muscat City Centre, Seeb, including network of dealers. Its SIM cards number have new series of numbers. It says that its distributors are the best and most experienced and retail brands in Oman (Times News Service, 2010). As per its website, it has 110 distributors to manage its SIM card sale and recharge management.

Table 10: Mazoon mobile International Tariff for different Countries

S.No.	Country	Peak	Off peak
1	United Arab Emirates	0.169	0.094
2	Bahrain,Kuwait,Qatar,KSA	0.169	0.113
3	Algeria,Egypt,Jordan,Iraq,Lebanon, Morocco, Palestine, Syria, Sudan, Tunisia,Yemen, US	0.199	0.161
4	India	0.199	0.094
5	Bangladesh, Iran	0.219	0.180
6	Pakistan, Sri Lanka	0.219	0.142
7	United kingdom	0.219	0.180
8	Australia, Ireland, Japan, Malaysia, Turkey, Indonesia	0.249	0.189
9	Philippines, Tanzania	0.249	0.142

Source: <http://www.mazoonmobile.com/>

**Mazoon mobile** ([www.mazoonmobile.com](http://www.mazoonmobile.com)):

**Major strategies:** Mazoon Mobile is a joint venture between Middle East Telecommunications Company (METCO), a subsidiary of WJ Towell group's company (with 51% holding) and Bahrain's Etisalcom (with a 49% holding). Mazoon Mobile commenced its operations in November 2009 (Middleton, 2009). It will also offer 3G data services as a MVNO. The preparation for launching mobile services has been underway since 2008. In October 2008, Mazoon mobile signed an agreement with ZTE (Zhong Xing Telecommunications Equipment Company Limited) of China, for supply of intelligent network platforms (Zawya, 2008), Oman observer (2008). The staff members of Mazoon Mobile spent a week at ZTE obtaining training. Most of these staff members were Oman nationals (Staff Reporter, 2009).

It has also launched its website (<http://www.mazoonmobile.com>) which features its brand ambassador, the iconic character 'Mazyoon'. Mazoon mobile has tied up with Blacksheep Oman (a joint venture company formed by Bahrain's Blacksheep advertising) and the Sultanate's Towell group for marketing activities. These agencies will take care of Mazoon's marketing strategy such as brand strategy, advertising, brand activation, public relation, and media planning (The week, 2009). The basic approach of Mazoon mobile is to address the

Table 11: National tariff plan of the existing MVNOs for voice calls

MVNO	MVNO to MVNO		MVNO to others	
	Peak	Off-Peak	Peak	Off-Peak
SAMATEL	Samatel to Samatel 53 Bz/M		Samatel to others 53 Bz/M	
Mazoon	Mazoon to Mazoon 39 Bz / M 54 Bz/2M		Mazoon to others 54 Bz/M	
		39 Bz/M (first 2 Minute), 36 Bz/M (Additional Minutes)		39 Bz/M
Majan	Reena to Reena		Reena to others	
Majan(Renna)[24/7plan]	45 Bz/M	45 Bz/M	45 Bz/M	45Bz/M
Majan(Renna)[6/6plan]	54 Bz/M	38 Bz/M	54 Bz/M	38 Bz/M
Present promotion tariff as on 25.09.10.	32 Bz/M2	8 Bz/M		
Friendi	Friendi to Friendi 39 Bz		Friendi to others 55 Bz	
		39 Bz		39 Bz
Apna Mobile	Apna to Apna 54 Bz		Apna to others 54 Bz	
		38 Bz		38 Bz

Source: Websites of all five resellers

Table 12: National and international SMS charges of MVNOs in Oman

MVNO	MVNO to MVNO	MVNO to other	International
Friendi	Friendi to Friendi 10 Bz	Friendi to others 10 Bz	43 Bz
Majan(Renna)	Reena to Reena 9 Bz	Reena to other 9 Bz	45 Bz
Mazoon Mobile	Mazoon to Mazoon 8.5 Bz	Mazoon to other 9 Bz	43 Bz
Samatel	Samatel to Samatel 9 Bz	Samatel to other 9 Bz	45 Bz
Apna Mobile	Apna Mobile to Apna Mobile 9 Bz (45 Bz)	Apna Mobile to Others 9 Bz (45 Bz)	

Source: Web sites of five resellers, In bracket are MMS charges for Apna Mobile

Table 13: International Zone for fixing international tariff as adopted by MVNOS in Oman

Zone	No. of countries	Name of countries
Zone-1	1	United Arab Emirates
Zone-2	4	Bahrain, Kuwait, Qatar, Saudi Arabia
Zone-3	Zone-3(a)	1 United States
	Zone-3(b)	16 Algeria, Yemen, Djibouti, Egypt, Eritrea, Iraq, Jordan, Lebanon, Libya, Mauritania, Morocco, Palestine, Somalia, Sudan, Syria, Tunisia
Zone-4	Zone-4(a)	1 India
	Zone-4(b)	2 Bangladesh, Pakistan
	Zone-4(c)	7 Austria, Belgium, Iran, Italy, Spain, Sri Lanka, Vatican City
	Zone-4(d)	1 United Kingdom,
Zone-5	Zone-5(a)	36 Angola, Argentina, Aruba, Azerbaijan, Bolivia, Brazil, Canada, Comoros and Mayotte, Cote d'Ivoire (Ivory Coast), Croatia, Cyprus, Denmark, Estonia, Finland, Georgia, Germany, Greece, Hungary, Ireland, Japan, Lithuania, Moldova, Monaco, New Zealand, Norway, Philippines, Portugal, Singapore, Slovenia, South Africa, South Korea, Sweden, Switzerland, Tanzania, Turkey, Uruguay
	Zone-5(b)	1 Malaysia
	Zone-5(c)	4 Australia, Australian External Territories, France, Netherlands
Zone-6	61	Albania, Anguilla, Antigua and Barbuda, Armenia, Barbados, Belarus, Belize, Bermuda, Bhutan, Brunei Darussalam, Burundi, Cayman Islands, Chile, Colombia, Czech Republic, Dominica, Ecuador, French Guiana, Grenada/Carricou, Guam, Guinea, Guyana, Honduras, Hong Kong, Iceland, Indonesia, Israel, Jamaica, Kazakhstan, Kenya, Kyrgyz Republic, Latvia, Lesotho, Liechtenstein, Luxembourg, Macedonia, Malta, Mauritius, Montserrat, Mozambique, Namibia, Niger, Nigeria, Northern Marianas, Paraguay, Peru, Poland, Russia, San Marino, Seychelles, Sierra Leone, St Kitts and Nevis, St Lucia, St Vincent and the Grenadines, Suriname, Swaziland, Taiwan, Thailand, Turks and Caicos, Uganda, Zimbabwe
Zone-7	33	Andorra, Ascension, Bosnia and Herzegovina, Botswana, British Virgin Islands, Bulgaria, Burma (Myanmar), Cameroon, Fiji Islands, French Polynesia, Ghana, Gibraltar, Haiti, Laos, Macao, Malawi, Maldives, Mexico, New Caledonia, Nicaragua, North Korea, Papua New Guinea, Reunion, Romania, Serbia and Montenegro, Slovakia, St Helena, Tajikistan, Trinidad and Tobago, Tuvalu, Ellice Is, Ukraine, Vanuatu, Zambia
Zone-8	64	Afghanistan, American Samoa, Bahamas, Benin, Burkina Faso, Cambodia, Cape Verde, Central African Republic, Chad, China, Congo (Brazzaville), Congo (Kinshasa, formerly Zaire), Cook Islands, Costa Rica, Cuba, Diego-Garcia, Dominican Republic, East Timor, El Salvador, Equatorial Guinea, Ethiopia, European Telephony Numbering Space, Faroe Islands, French Antilles (Guadeloupe, etc.), Gabonese Republic, Gambia, Global Mobile Satellite System, Greenland, Guatemala, Guinea-Bissau, Kiribati, Gilbert Is, Liberia, Madagascar, Mali, Marshall Islands, Martinique, Micronesia, Mongolia, Nauru, Nepal, Netherlands Antilles, Niue Island, Palau, Panama, Puerto Rico, Rwanda, Samoa, Sao Tome and Principe, Senegal, Shared Cost Services, Solomon Islands, St Pierre and Miquelon, Togolese Republic, Tokelau, Tonga, Turkmenistan, U.S. Virgin Islands, Uzbekistan, Vietnam, Wallis and Futuna

customer lifestyle needs and deliver value for money. According to Bevir (2009), Mazoon mobile will target customers from the low end expatriate communities, locals "below a certain ARPU level", youth and rural communities. Its slogan is "It is all good".

**Tariff plan:** The international tariff rates of Mazoon mobile are presented in Table 10. These rates are further reduced to make its services with low international tariffs

from the first minute of usage for select countries. The tariff to India, for instance, has been placed at 77 Bz, while that for Pakistan and Bangladesh starts at 99 Bz. In addition, calling to other international destinations such as the Philippines is 116 Bz, and to the United Kingdom it is packed at 147 Bz (Times of Oman, 2010). The tariff for National calls and SMS are presented in Table 11 and 12. The charges are different for first and second minutes. The SMS charges for its own customers are lowest among

Table 14 : Analysis of variances among the MVNOs for creating zones

Zone for Apna mobile	Zone for Friendi mobile	Zone for Samatel mobile	Zone for Majan / Renna mobile	Zone for Mazoon mobile
Zone-1	Zone-1	Zone-1	Zone-1	Zone-1
Zone-2	Zone-2	Zone-2	Zone-2	Zone-2
Zone-3	Zone-3(a)	Zone-3	Zone-3	Zone-3- (Djibouti, Eritrea, Libya, Mauritania)
Zone-4	Zone-3(b) Zone-4(a) Zone-4(b) Zone-4(c) - (Vatican City)	Zone-4	Zone-4- (Vatican City)	Zone-4-(a) Zone-4(b) - (Pakistan) + (Sri Lanka) Zone-4(c)+Bangladesh)-(Austria, Belgium, Italy, Spain, Sri Lanka, Vatican City) Zone-4(d)
Zone-5	Zone-4(d) Zone-5(a) – (Greece,Singapore) +( Venezuela)	Zone-5+ ( Venezuela)	Zone-5-( Australia, Australian External Territories, Malaysia, Netherlands, South Korea) + (Venezuela)	Zone-5 (contain only Australia, Ireland, Japan, Malaysia, Turkey, Indonesia)
Zone-6	Zone-5(b) Zone-5(c) Zone-6 –(Kyrgyz Republic, Niger, Northern Marianas) +( )	Zone-6- (Israel)	Zone-6-(Dominica, Kazakhstan, Zimbabwe) + (Cayman ISL, Korea South , Ukraine)	Zone-6 (contain only Philippines, Tanzania)
Zone-7	Zone-7- (Burma (Myanmar) +(Montenegro)	Zone-7 + (Montenegro)	Zone-7- (Burma (Myanmar), North Korea, Ukraine) + (Afghanistan , Beulah, Falkland ISL, Hawaii , Kazakhstan , Korea North, Madagascar, Malagasy, Montenegro, Myanmar, Saipan, Samoa, Tobago, Western Samoa, Yugoslavia, Zimbabwe)	
Zone-8	Zone-8 -(American Samoa, Cambodia, Congo (Brazzaville), East Timor) + (Guadeloupe ISL, Kampuchea)	Zone-8	Zone-8 –(Afghanistan, Cambodia, European Telephony Numbering Space, Global Mobile Satellite System, International Networks, International Premium Rate Service, ITPCS trials, Madagascar, Micronesia, Samoa) + (Dominican Rep. , Futunan , Kampuchea, Norfolk ISL)	

the charges of five MVNOs. Further it charges 0.025 Bz/SMS for the value added services such as breaking news, news headlines, business headlines, local sports, international sports, jokes, cinema, Bollywood, prayer timings, diet tips, beauty tips, herbs therapy etc. The name of these information services is i-Mazoon. In addition to 0.025 Bz, customers need to pay monthly subscription of 1 RO for availing these information services. Its latest Tariff promotion includes “1 Minutes on U- 1 Minute on US”.

**SIM card and recharge management:** Mazoon has signed an agreement with some "eight or ten" main distributors and each one of them has a network of dealers giving Mazoon access to 4,000 dealer points in Oman. The list of its distributors includes Fairtrade, Adhwa Al Billa Trading (ABT), Mustafa Sultan and Genetco. The customers can get information from Genetco and any branch of ABT.

### CONCLUSION

As reported in the literature, the single greatest threat to the MVNO business model is an over-reliance on the low-cost, discount business model and greatest

opportunities are the machine to machine, government, and enterprise markets and being complementary to MNO’s strategies. They fail when they do not have a robust distribution or device strategy, and start behaving like MNO. The most important factors to a sustainable MVNO launch are distinct consumer offers and capability to have competition among MNOs on your business.

All MVNOs have launched their services in Oman. All of them have put in place their relations with technology providers, marketing and advertising agencies, and distribution channels for SIM cards and recharge coupons. Based on the analysis of data presented in the article, the following inferences are drawn:

- The services of MVNOs are in pre-paid segments. The services can be classified national, international and value added services.
- The policies of acquiring customers for national services as well as international services are based on low cost business model. Within the short periods of operations the tariff are further reduced by MVNOs. The recent promotion statements of the MVNOs are (a) “Talk more for Less!” (Apna mobile), (b) “1 minute on U 1 Minute on Us” (Mazoon Mobile), (c) “Pay 2 little and get 2 much” followed by “welcome

Table 15: Zone wise comparative analysis of international tariff of different mobile company in Oman

Zone	Sub-Zone	Friendi		Samatel		Apna mobile		Renna Mobile		Mazoon mobile	
		Peak	Off Peak	Peak	Off-peak	Peak	Off-peak	Peak	Off-Peak	Peak	Off-Peak
Zone-1	-	0.136	0.085	0.168	0.098	0.169	0.099	0.170	0.120	0.169	0.094
Zone-2	-	0.136	0.096	0.168	0.118	0.169	0.119	0.170	0.105	0.169	0.113
Zone-3	Zone-3(a)	0.152	0.132	0.198	0.168	0.199	0.169	0.200	0.175	0.199	0.161
	Zone-3(b)	0.160	0.140								
Zone-4	Zone-4(a)	0.160	0.095	0.098		0.189	0.089	0.200	0.175	0.199	0.094
	Zone-4(b)	0.180	0.095			0.189	0.189	0.225	0.190	0.219	0.180
	Zone-4(c)	0.180	0.152	0.218	0.188					0.219	0.142 <sup>2</sup>
	Zone-4(d)	0.180	0.152							0.219	0.180
Zone-5	Zone-5(a)	0.200	0.160	0.248	0.198	0.249	0.199	0.250	0.200	0.249	0.189 /0.142 <sup>1</sup>
	Zone-5(b)							0.239	0.193		
	Zone-5(c)	0.191	0.154								
Zone-6		0.240	0.188	0.298	0.228	0.299	0.229	0.350	0.300	0.299	0.189
Zone-7		0.240	0.188	0.348	0.298	0.349	0.299	0.350	0.300		
Zone-8		0.340	0.280	0.418	0.348	0.419	0.349	0.425	0.350		

<sup>1</sup>Philippines and Tanzania, <sup>2</sup>Pakistan and Sri lanka

Table 16: International tariff for select countries for MVNOs in Oman

Countries	MVNOs									
	Friendi mobile		Mazoon mobile		Renna mobile		Samatel mobile		Apna Mobile	
	Off peak	Peak	Off peak	Peak	Off peak	Peak	Off peak	Peak	Off peak	Peak
India	0.095	0.160	0.094	0.199	0.175	0.200	0.098	0.098	0.089	0.189
Pakistan	0.095	0.180	0.142	0.219	0.190	0.225			0.189	0.219
Bangladesh	0.095	0.180	0.180	0.219	0.190	0.225			0.189	0.219
Indonesia	0.188	0.240	0.189	0.299	0.235	0.300	0.198	0.248	0.229	0.299
Philippines	0.160	0.200	0.142	0.249	0.200	0.250	0.188	0.218	0.119	0.249
Sri Lanka	0.152	0.180	0.142	0.219	0.190	0.225			0.189	0.219
Egypt	0.140	0.160	0.161	0.199	0.175	0.200	0.168	0.198	-	-
UAE	0.085	0.136	0.094	0.169	0.105	0.170	0.098	0.168	0.099	0.169
Saudi Arabia	0.096	0.136	0.113	0.169	0.120	0.170	0.118	0.168	0.119	0.169

pack for only 2 Rials and get 2 Rials credit free (FRiENDi Mobile), (d) “now 25% off on 6 numbers-3 national and 3 international” (Renna Mobile), and (e) “Jut pay 1 Rial and get 2 Rials + 2 Rials” (Samatel). The question is what will be next in term of cost. It may not be feasible strategy in the long run. Adding values to the services may be the only option.

- The international services are classified in to different zones by all the five MVNOs. The classification of the countries is not the same. It varies from one MVNO to other. Classification of countries in different zones by MVNOs is given in Table 13. It is done with a view to see the similarities among the zones of MVNOs. The criterion for crating zones is the zones of Apna Mobile and FRiENDi Mobile. The variations in the zones across the MVNOs are shown in Table 14. The zone wise tariff for international calls is presented in Table 15. All the MVNOs are having differential rates for off peak and peak hours. The variation is up to 65%. However, in some cases the tariff is same for off peak and peak hours.
- The tariff data for select countries is given in Table 16. Except, Samatel which has same tariff for India during off peak and peak hours, all have differential tariff. All the MVNOs have lowest peak tariff for UAE and Saudi Arabia except Apna Mobile. The lowest peak tariff for Pakistan, Sri Lanka and

Bangladesh (large segment of customers for MVNOs) is by FRiENDi Mobile.

- The two MNOs are selling bulk time to five MVNOs in Oman. It will not be a one to one relation between MNO and MVNOs. Having more than one MVNO in the same areas of operations and satisfying them for availability of spectrum will be very complex issues to handle. This is evident from the dispute ([http://www.tra.gov.om/newsite1/portal/upload/documents/349\\_TRADetermination-2-2009.pdf](http://www.tra.gov.om/newsite1/portal/upload/documents/349_TRADetermination-2-2009.pdf)) between Nawras and Injaz International Telecom (News, 2010).
- The MVNOs are targeting underserved segment of the Omani subscribers. They are also pursuing to some extend ethnic MVNO practices, business models, and tariff models (Singh, 2010b). In fact the first two MVNOs (Majan and FRiENDi) have started attracting expatriates of many countries. Latest Apna mobile is concentrating more on Indians.
- The strategies of MVNOs are customer centric. MVNOs business processes are tuned to understand the needs of their customers and customize the services to meet the requirements of customers with a view to create strong relations with their customers.
- Oman has recorded a 147% mobile tele-density as present and can be classified as a saturated market. The introduction of MVNO in a saturated market is a laudable effort by the Government to create a more competitive environment in the mobile telecom

sector with a view to providing quality telecom services to the citizens of the country. In days to come, with 7 players (2MNO+5 MVNO), the customer will get high quality services and choice. They will get value for their hard earned money by having improved service.

- The customer will pay less and get more provided systems and processes are transparent, specifically systems of termination of services, billing, and tariff plans.
- Based on the analysis of facts about MVNO business in Oman, the propositions of section2 can be interpreted as follows.

**Proposition 1:** Success of MVNO business model depends on flexibility of tariff of various services of MVNOs. It is true. All MVNOs are changing their tariff models based on destination, minutes of usages etc.

**Proposition 2:** Success of MVNO model depends on innovative services for specific segment of the subscribers. It is true. The MVNOs are adding innovative information and infotainment services such as prayer times, health tips, beauty tips, cinema etc.

**Proposition 3:** Low cost model is the sole factor for the success of MVNO model in the long run. It is false. There is a variation in tariff models of MVNOs. Still all are growing presently.

**Proposition 4:** Success of MVNO depends on bundling of services in tariff models. Cannot say. Not much data is reported with respect to bundling of the services.

**Proposition 5:** Promotion schemes of MVNO are successful if linked to social and cultural values of the subscribers. It is true. Apna mobile brand is an example.

**Proposition 6:** Low cost models are not uniform across the MVNOs. It is true. For each MVNO there are favored destinations for international services and subscribers segment for national services.

**Proposition 7:** The growth of subscriber base will depends on its impact on financial benefits to MNO. It is true. It is evident from the statement of Oman Mobile (Omantel) "57% of its net additions in the last 12 months came from its new MVNO partners (Groves, 2010)"

**Proposition 8:** The growth of MVNO subscriber base will depends on favorable regulations. It is true. The countries where MNOs are forced to share spectrum with MVNOs are witnessing more growth of MVNO subscribers in comparison to countries where regulations are not in favor of MVNOs. The example of favorable

regulation is Hong Kong. In Oman regulator is promoting MVNOs but spectrum usage is not linked as in case of Hong Kong.

- **The impact:** It will bring competition and better services to the subscribers. However, in future some of the MVNOs may not survive due to fierce competition and small size of the market as it happened in many European counties.
- It will sustain the growth of prepaid segment. It will compensate for the transition of prepaid segment of the customers to post paid segment.
- **Strategies:** In Oman, the success of MVNOs may depends on the following strategies
  - Bundling of their offerings with cheaper and featured handsets for low income strata of subscribers. Costly handsets linked with one to two year tariff plans for higher income strata of subscribers.
  - Enhancing their offerings with value added services such as location based services, m-commerce, and other services listed by Paul (2006/08).
  - Making billing, minutes of usage and service termination processes more transparent.
  - They may think of targeting post paid segment of the customers also.
  - They may venture in MVNE, value added services provider domain for sustainability in the long run because they understand the business of telecom services as well as needs of the customers.
- There is a need to conduct further research to analyze the impact of above mentioned factors on the success of MVNO business in Oman along with comparative analysis with the countries where in MVNO is a success.

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