



**STATISTICS REPORT FOR TELECOM, MEDIA  
AND BROADCASTING SECTOR AS OF THE  
FIRST QUARTER OF THE YEAR 2021**

**Disclaimer:** Information provided in this report is subject to alteration in case of any revisions or updates deemed necessary

## TABLE OF CONTENTS

TABLE OF CONTENTS .....	i
LIST OF FIGURES.....	3
REPORT SUMMARY .....	4
1. MOBILE TELEPHONE SERVICES .....	5
1.1. Mobile subscriptions.....	5
1.2. Market share for mobile (SIM cards) Subscriptions .....	6
1.3. Mobile Voice, and SMS tariff structure .....	7
1.4. Mobile traffic statistics .....	8
1.4.1. Mobile outgoing and incoming voice traffic .....	8
1.4.2. Outgoing and incoming SMS traffic .....	10
2. ROAMING .....	11
2.1. Roaming subscribers.....	11
2.2. Roaming traffic.....	12
3. FIXED TELEPHONE SERVICES .....	12
3.1. Fixed telephone subscriptions .....	12
3.2. Fixed telephone traffic.....	14
3.3. Fixed telephone service tariff .....	15
4. INTERNET SERVICE PROVISION .....	16
4.1. Internet subscriptions.....	16
4.2. International internet bandwidth.....	18
4.3. Mobile internet tariff .....	19
5. TELECOMMUNICATION REVENUES AND INVESTMENT .....	19
6. EMPLOYMENT IN TELECOMMUNICATION SECTOR.....	20
7. MEDIA AND BROADCASTING .....	22
7.1. Licensed media operators .....	22
7.2. Pay TV subscriptions.....	22
7.3. Decoders sold .....	23
7.4. Pay TV staff.....	24

## LIST OF TABLES

Table 1: Key ICT indicators .....	4
Table 2: Comparison of active mobile subscriptions per operator by contract type .....	5
Table 3: Mobile telephone voice tariff (in Frw) per minute per operator as of March 2021 .....	7
Table 4: SMS tariff structure (in Frw) as of March 2021 .....	8
Table 5: Outgoing and incoming traffic (in minutes) per operator as of the 1 <sup>st</sup> quarter 2021 .....	8
Table 6: Average minutes per call per operator in the 1 <sup>st</sup> quarter 2021 .....	9
Table 7: SMS traffic (in numbers) as of the first quarter 2021 .....	10
Table 8: International roaming subscribers as of the first quarter 2021 .....	11
Table 9: Outgoing and incoming roaming traffic (in minutes) per operator as of the first quarter 2021 .....	12
Table 10: Fixed telephone subscriptions as of March 2021 .....	12
Table 11: Outgoing mobile and fixed telephone incoming traffic .....	14
Table 12: Fixed telephone service tariff structure (in Frw) per minute as of March 2021 .....	15
Table 13: Internet subscriptions per category as of March 2021 .....	16
Table 14: Fixed internet subscriptions by speed .....	17
Table 15: Trend of quarterly revenues (Frw) from Q2 2020 to Q1 2021 .....	19
Table 16: Trend of additional investment (Frw) made in the first quarter 2021 .....	19
Table 17: Number of staff employed in telecommunication sectors as of March 2021 .....	20
Table 18: Trends of Licensed media operators from March 2020 to March 2021 .....	22
Table 19: Number of Pay TV subscribers as of March 2021 .....	22
Table 20: Trend of decoders sold from 1 <sup>st</sup> quarter 2020 to 1 <sup>st</sup> quarter of 2021 .....	23
Table 21: Number of staff employed in Pay TV operators as of March 2021 .....	24

## LIST OF FIGURES

Figure 1: Trend of mobile subscriptions and penetration rate from Q1 2020 to Q1 2021 .....	6
Figure 2: Market share trends for mobile (SIM cards) subscriptions per operator .....	6
Figure 3: Trend of average mobile voice tariff (in Frw) per minute from 2014 to March 2021.....	7
Figure 4: Outgoing on net, off net and international voice traffic's market share as of the 1 <sup>st</sup> quarter 2021 .....	9
Figure 5: Outgoing on net, off net and international SMS traffic market share as of the first quarter 2021 .....	10
Figure 6: Trend of roaming subscribers from Q1 2020 to Q1 2021 .....	11
Figure 7: Trend of fixed telephone subscriptions and penetration rate .....	13
Figure 8: Market share trends for fixed telephone subscriptions per operator as of Mar-2021 .....	14
Figure 9: Trend of internet subscriptions and internet subscriptions per 100 inhabitants .....	17
Figure 10: Fixed internet subscriptions by technology .....	18
Figure 11: Trend of international internet bandwidth (Mbps) from Q1 2020 to Q1 2021 .....	18
Figure 12: Standard mobile internet tariff (Frw/MB) as of March 2021 .....	19
Figure 13: Telecom staff by gender as of March 2021 .....	21
Figure 14: Market share for Pay TV active subscribers per operator as of March 2021 .....	23

## REPORT SUMMARY

This report compiles the information from telecom operators, 4G wholesaler, Internet Service Providers (ISPs), Media and Broadcasting operators as per their license obligations for the period from 1<sup>st</sup> January to 31<sup>st</sup> March 2021.

**Table 1: Key ICT indicators**

INDICATORS	Q4 2020	Q1 2021	% change between Q1-21 and Q4-20
<b>SUBSCRIPTIONS</b>			
Mobile subscriptions	10,614,408	10,735,734	1.14
Fixed subscriptions	11,671	11,784	0.97
Mobile (SIM) penetration rate (%)	83.82	82.86	-1.14
Fixed telephone penetration rate (%)	0.0922	0.0910	-1.31
<b>VOICE TRAFFIC IN MINUTES</b>			
On-Net Voice Traffic	6,140,862,875	5,933,725,551	-3.37
Outgoing Off-Net Voice Traffic	94,278,865	154,713,384	64.10
International Outgoing mobile voice traffic	8,572,312	10,682,708	24.62
International Incoming mobile voice traffic	17,692,326	15,878,105	-10.25
<b>ROAMING SUBSCRIBERS</b>			
Roaming-in (Foreign subscribers)	1,210,619	1,111,967	-8.15
Roaming-Out (Own subscribers)	824,422	855,133	3.73
<b>ROAMING TRAFFIC</b>			
Total incoming minutes for roamers	42,449,587	44,115,468	3.92
Total outgoing minutes for roamers	2,230,649	1,908,917	-14.42
<b>SMS TRAFFIC</b>			
On-net SMS	863,335,064	868,282,506	0.57
Outgoing Off-net SMS	4,484,361	3,615,366	-19.38
Outgoing International SMS	602,472	997,842	65.62
Incoming International SMS	408,740	356,211	-12.85
<b>DATA/INTERNET</b>			
Internet subscriptions	7,995,325	8,240,259	3.06
Internet subscriptions per 100 inhabitants	63.1	63.6	0.74
Equipped international internet bandwidth (Mbps)	125,510	127,558	1.63
Used international internet bandwidth (Mbps)	61,469	58,094	-5.49
<b>MEDIA AND BROADCASTING</b>			
Number of Television stations	19	18	-5.26
Number of Radio FM stations	29	30	3.45
Active Pay TV subscribers	65,251	68,342	4.74
Registered Pay TV subscribers	320,198	344,018	7.44

Source: Operators' reports, March 2021

## 1. MOBILE TELEPHONE SERVICES

### 1.1. Mobile subscriptions

During the first quarter of the year 2021, the operators offering mobile telephone services were MTN Rwanda Ltd and Airtel Rwanda Ltd. The number of active mobile subscriptions reported at the end of March 2021 were 10.7 million SIM cards.

**Table 2: Comparison of active<sup>1</sup> mobile subscriptions per operator by contract type**

Name of operator	March 2021			December 2020			Quarterly Variation
	Postpaid	Prepaid	Total	Postpaid	Prepaid	Total	
MTN Rwanda Ltd	87,486	6,631,639	6,719,125	83,141	6,473,932	6,557,073	<b>2.5%</b>
Airtel Rwanda Ltd	4,865	4,011,744	4,016,609	4,725	4,052,610	4,057,335	<b>-1.0%</b>
<b>Total</b>	<b>92,351</b>	<b>10,643,383</b>	<b>10,735,734</b>	<b>87,866</b>	<b>10,526,542</b>	<b>10,614,408</b>	<b>1.1%</b>

**Source: Operators' reports, March 2021**

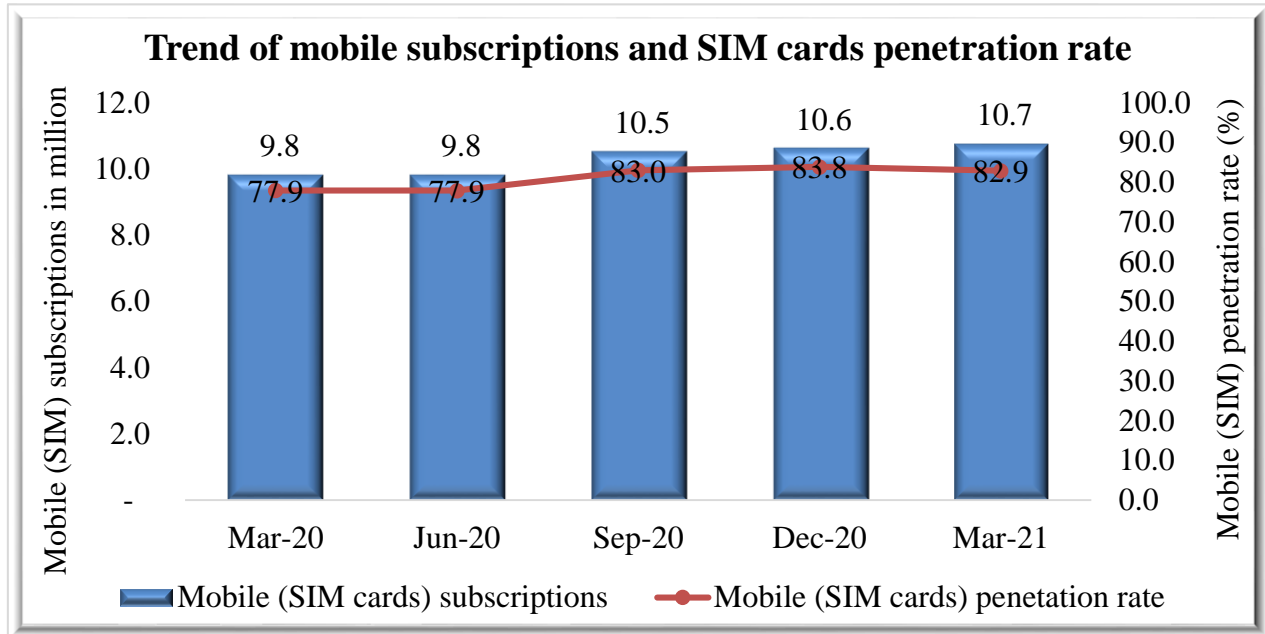
As of March 2021, the number of active mobile (SIM cards) subscriptions in the country increased to 10.7 million from 9.8 million reported at the end of March 2020. During this quarter under review, the active mobile-cellular telephone (SIM cards) subscriptions registered for every 100 people increased to 82.9% from 77.9% recorded at the end of March 2020.

The Figure 1 shows the trends of mobile subscriptions and penetration rates.

---

<sup>1</sup> Active mobile subscriptions refer to the number of SIM cards that have generated revenues to the operator within the last 90 days.

**Figure 1: Trend of mobile subscriptions and penetration rate<sup>2</sup> from Q1 2020 to Q1 2021**

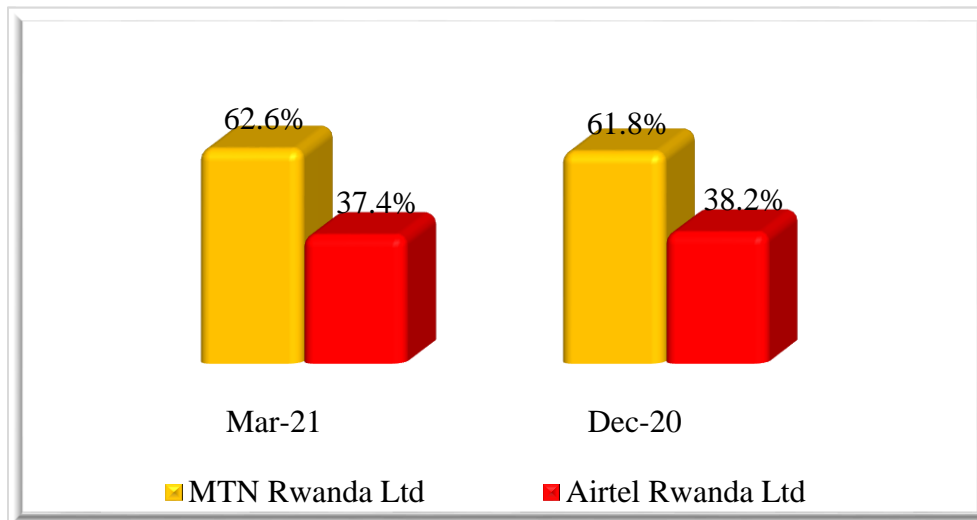


Source: Operators’ reports, March 2021

### 1.2. Market share for mobile (SIM cards) Subscriptions

At the end of the first quarter of 2021, the active mobile subscriptions market shares for MTN Rwanda Ltd increased by 0.8 percentage points up to 62.6 percent, whereas that for Airtel Rwanda Ltd dropped by the same margin reaching 37.4 percent compared to the previous quarter.

**Figure 2: Market share trends for mobile (SIM cards) subscriptions per operator**



Source: Operators’ reports, March 2021

<sup>2</sup> Mobile (SIM cards) penetration rate (%) is computed with reference to the sum of active SIM cards over the Rwandan population as projected by National Institute of Statistics of Rwanda.

### 1.3. Mobile Voice, and SMS tariff structure

During the period under review, the average standard tariff for calling by mobile phone within a telecom operator was 40 Frw/Min while also 40 Frw/Min was between telecom operators, 90 Frw/Min in One Area Network Countries, and 51 Frw/Min to call in US, Canada, China, and India.

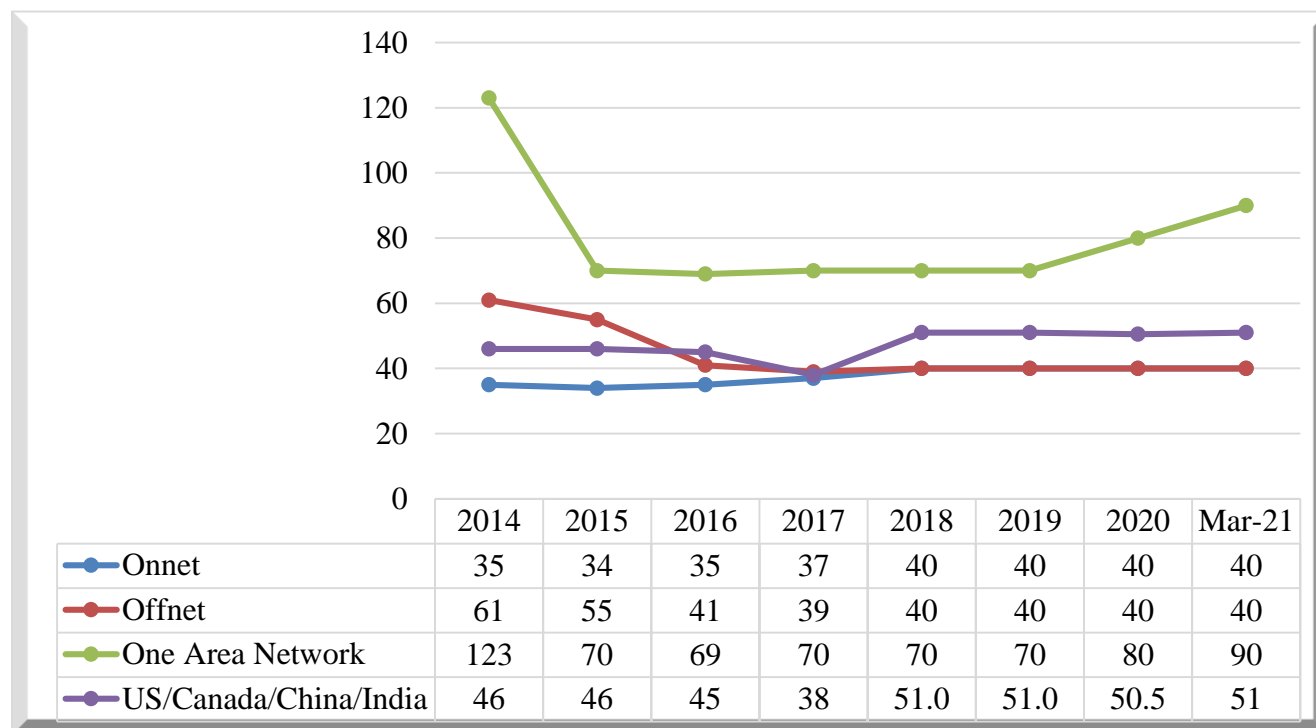
**Table 3: Mobile telephone voice tariff (in Frw) per minute per operator as of March 2021**

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Average
Onnet	45	35	40
Offnet	45	35	40
One Area Network	90	90	90
US/Canada/China/India	51	51	51

Source: Operators' reports, March 2021

The standard average tariff for calling by mobile telephone within a telecom operator, between telecom operators, and to call in US, Canada, China, and India was 40 Frw/Min, 40 Frw/Min, and 51 Frw/Min respectively. The standard average voice tariff for calling in One Area Network Countries increased by 12.5% to 90 Frw/min from 80 Frw/Min reported at the end of the year 2020.

**Figure 3: Trend of average mobile voice tariff (in Frw) per minute from 2014 to March 2021**



Source: Operators' reports, March 2021



As of the first quarter 2021, the average tariff for sending a message within a telecom operator, between telecom operators, in ONA countries, and International was 8.5 Frw, 20.5 Frw, 43.5 Frw, and 80.5 respectively. A subscriber on Airtel Rwanda’s network sends a message to its Africa sister companies at 26 Frw.

**Table 4: SMS tariff structure (in Frw) as of March 2021**

SMS Tariff	MTN Rwanda Ltd	Airtel Rwanda Ltd	Average
Onnet tariff	12	5	8.5
Offnet tariff	26	15	20.5
ONA	47	40	43.5
Rest of the World	82	79	80.5

Source: Operators’ reports, March 2021

#### 1.4. Mobile traffic statistics

##### 1.4.1. Mobile outgoing and incoming voice traffic

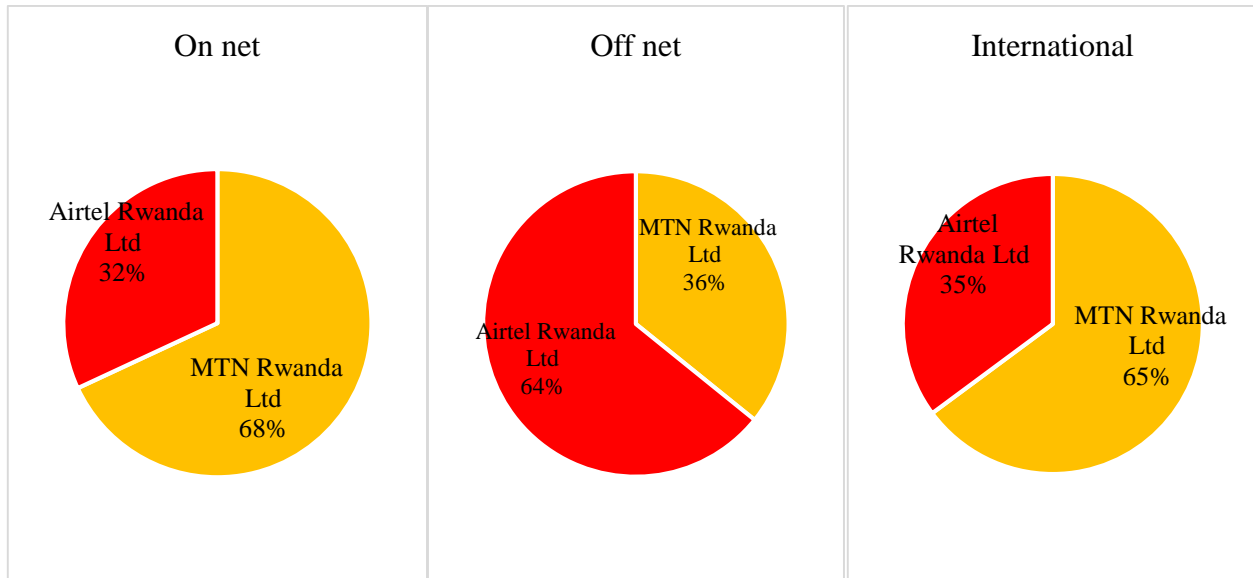
During the first quarter of the year 2021, the total volume of minutes originating within mobile networks was 5.9 billion minutes, the total minutes originating from one mobile networks to other networks was 154.4 million minutes, and the total minutes from mobile networks to international networks was 10.5 million minutes. The number of minutes from international networks to local mobile networks was 15.8 million minutes.

**Table 5: Outgoing and incoming traffic (in minutes) per operator as of the 1<sup>st</sup> quarter 2021**

Voice traffic	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Outgoing calls			
On net	4,037,625,214	1,893,848,768	<b>5,931,473,982</b>
Off net	55,299,609	99,118,837	<b>154,418,446</b>
International	6,832,361	3,701,625	<b>10,533,986</b>
Incoming calls			
International	8,018,366	7,851,340	<b>15,869,706</b>

Source: Operators’ reports, March 2021

**Figure 4: Outgoing on net, off net and international voice traffic’s market share as of the 1<sup>st</sup> quarter 2021**



Source: Operators’ reports, March 2021

During the first quarter 2021, the average minutes per call within mobile telecom networks was 2.2, average minutes per call to call other networks was 1.5 while the average minutes per call from Rwanda mobile networks to international networks was 3.1. Further, the average minutes per call from international networks to Rwanda mobile networks was 2.8.

**Table 6: Average minutes per call per operator in the 1<sup>st</sup> quarter 2021**

Voice traffic	MTN Rwanda Ltd	Airtel Rwanda Ltd	Combined
Outgoing calls			
On net	2.0	2.9	<b>2.2</b>
Off net	1.4	1.5	<b>1.5</b>
International	3.3	2.6	<b>3.1</b>
Incoming calls			
International	2.5	3.2	<b>2.8</b>

Source: Operators’ reports, March 2021

### 1.4.2. Outgoing and incoming SMS traffic

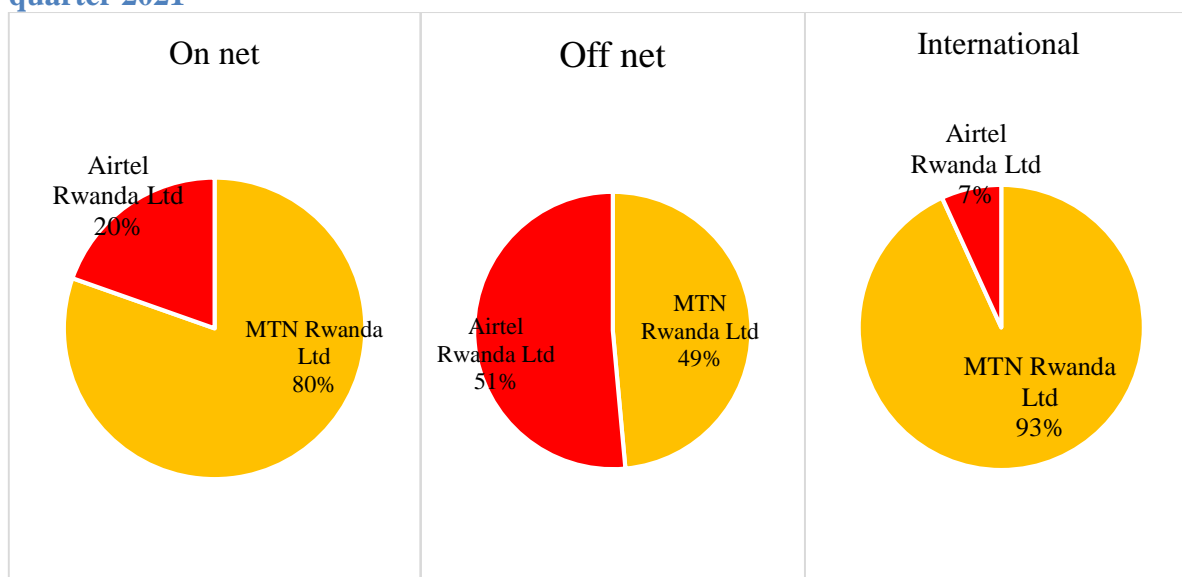
The total volume of SMS traffic originating within mobile networks was 868.2 million SMS, the total SMS traffic originating from mobile networks to other mobile networks was 3.6 million SMS and the total SMS traffic from mobile networks to international networks was 0.9 million SMS. The number of SMS from international networks to Rwanda was 0.3 million SMS.

**Table 7: SMS traffic (in numbers) as of the first quarter 2021**

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Outgoing SMS			
On net	698,079,016	170,203,490	<b>868,282,506</b>
Off net	1,755,279	1,860,087	<b>3,615,366</b>
International	929,839	68,003	<b>997,842</b>
Incoming SMS			
International	313,837	42,374	<b>356,211</b>

Source: Operators' reports, March 2021

**Figure 5: Outgoing on net, off net and international SMS traffic market share as of the first quarter 2021**



Source: Operators' reports, March 2021

## 2. ROAMING

### 2.1. Roaming subscribers

The international roaming subscribers during the first quarter of the year 2021 stood at 1.1 million foreign subscribers roamed on local networks whereas 0.8 million Rwanda subscribers roamed on foreign networks.

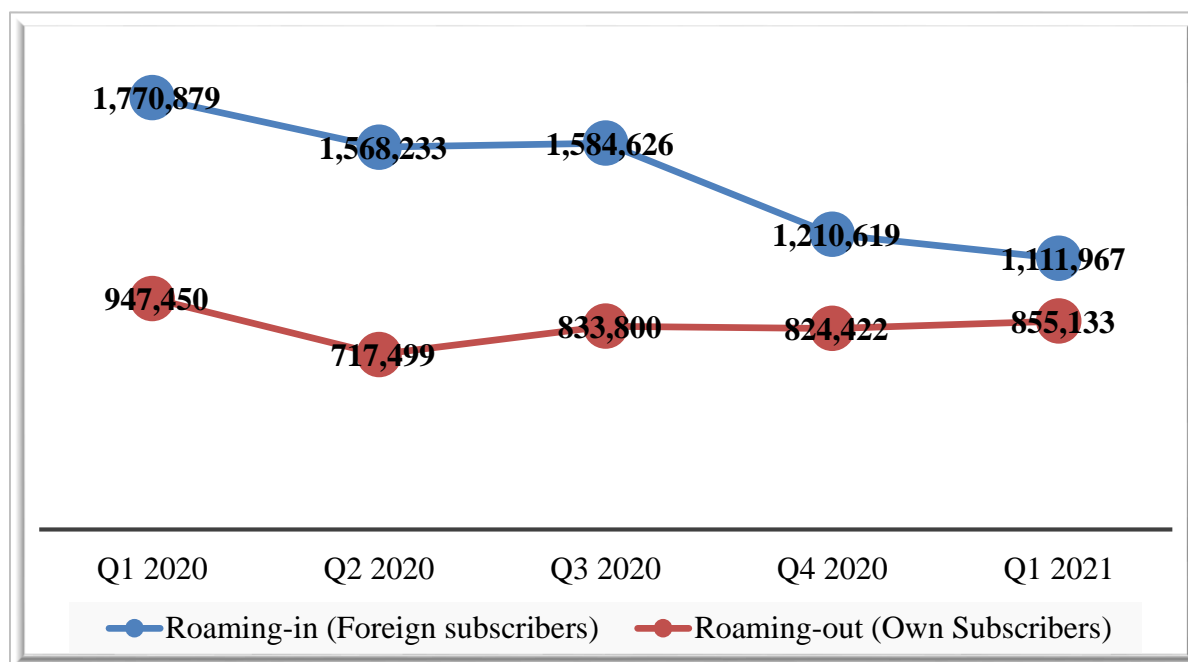
**Table 8: International roaming subscribers as of the first quarter 2021**

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Roaming-in (Foreign subscribers)	668,125	443,842	<b>1,111,967</b>
Roaming-out (Own Subscribers)	727,583	127,550	<b>855,133</b>

Source: Operators' reports, March 2021

During the first quarter 2021, the number of roamers-out increased to 855,133 from 824,422 subscribers representing an increase of 3.7% and the number of roamers-in decreased to 1,111,967 from 1,210,619 subscribers recorded during the previous quarter, which is equivalent to 8.1 percent.

**Figure 6: Trend of roaming subscribers from Q1 2020 to Q1 2021**



Source: Operators' reports, March 2021

## 2.2. Roaming traffic

During the quarter under review, the total volume of outgoing traffic generated by foreign subscribers roaming in Rwanda was 1.0 million minutes whereas the total minutes generated by Rwanda mobile networks' subscribers roamed outside the country was 0.8 million minutes. On the other hand, the total incoming traffic on foreign subscribers roamed in Rwanda was 29.3 million minutes and the incoming minutes to Rwanda subscribers roamed on foreign networks was 14.7 million.

**Table 9: Outgoing and incoming roaming traffic (in minutes) per operator as of the first quarter 2021**

Destination	Foreign subscribers roaming on local networks			Own subscribers roaming on foreign networks		
	MTN	Airtel	Total	MTN	Airtel	Total
Outgoing	647,232	362,687	1,009,919	866,629	32,369	898,998
Incoming	17,340,596	12,014,154	29,354,750	13,536,213	1,224,506	14,760,718
<b>Total</b>	<b>17,987,828</b>	<b>12,376,841</b>	<b>30,364,669</b>	<b>14,402,842</b>	<b>1,256,875</b>	<b>15,659,716</b>

Source: Operators' reports, March 2021

## 3. FIXED TELEPHONE SERVICES

### 3.1. Fixed telephone subscriptions

As of the first quarter of the year 2021, the operators offering fixed telephone services were Liquid Telecom Ltd, MTN Rwanda Ltd, Airtel Rwanda Ltd and BSC Ltd that offers voice-over-IP (VoIP) subscriptions only.

**Table 10: Fixed telephone subscriptions as of March 2021**

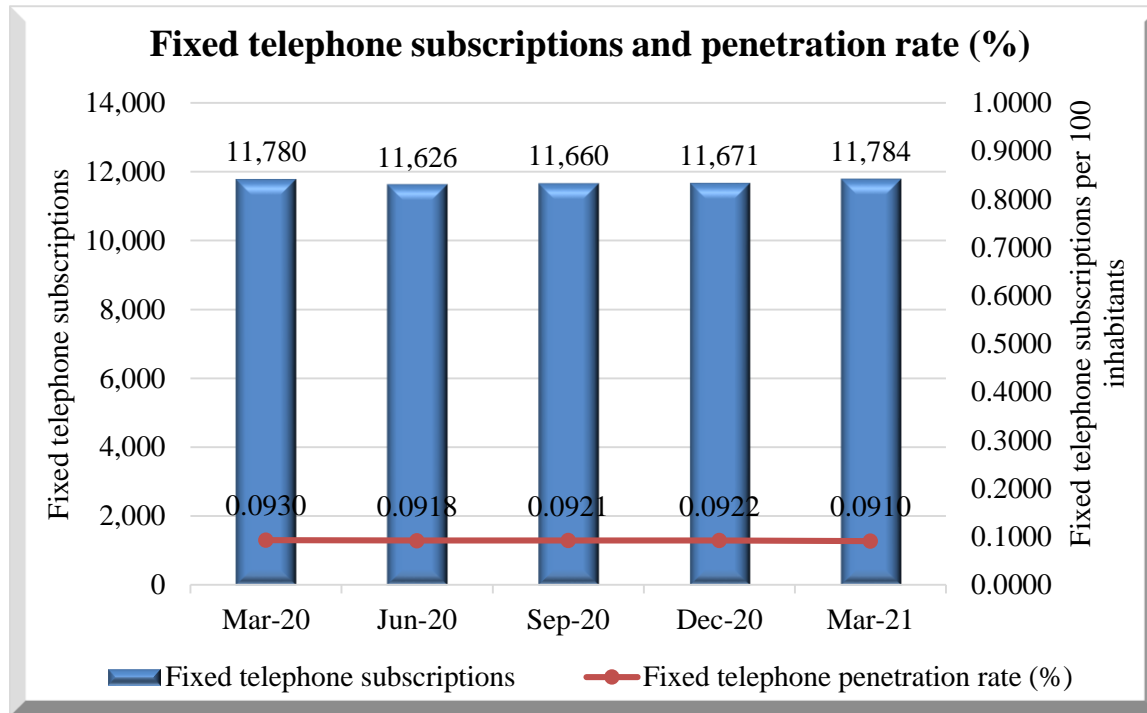
Name of Operator	Fixed telephone subscriptions	Fixed telephone penetration rate (%) <sup>3</sup>
MTN Rwanda Ltd	190	<b>0.0910</b>
Airtel Rwanda Ltd	9,521	
Liquid Telecom Ltd	813	
BSC Ltd	1,260	
<b>Total</b>	<b>11,784</b>	

Source: Operators' reports, March 2021

<sup>3</sup> Fixed telephone penetration rate (%) is computed with reference to the sum of active numbers of analogue-fixed telephone lines and VoIP over the Rwandan population as projected by National Institute of Statistics of Rwanda.

At the end of March 2021, the number of fixed telephone subscriptions increased up to 11,784 from 11,780 recorded as of the first quarter of 2020. As result, fixed telephone subscriptions per 100 people increased to 0.0930 percent from 0.0910 percent.

**Figure 7: Trend of fixed telephone subscriptions and penetration rate**

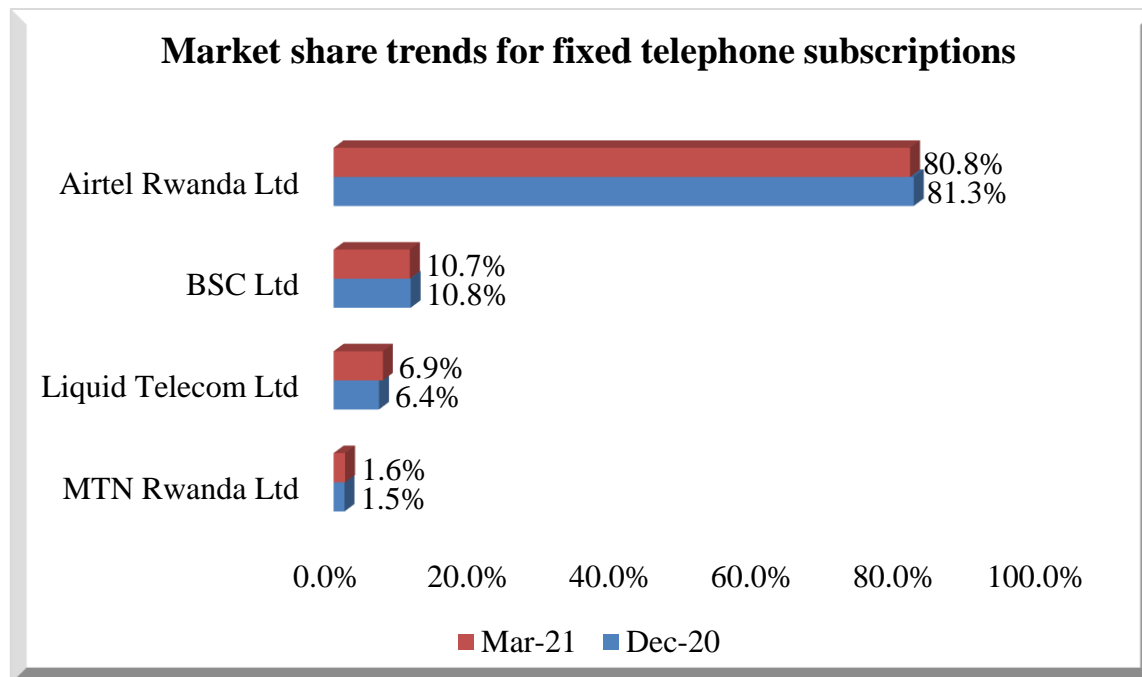


**Source: Operators’ reports, March 2021**

As of March 2021, the market shares in fixed telephone subscriptions for Airtel Rwanda Ltd decreased by 0.5 percentage points up to 80.8 percent, and that for Liquid Telecom Ltd increased by 0.5 percentage points up to 6.9 per cent. The market shares for MTN Rwanda Ltd increased by 0.1 percentage points whereas that for BSC Ltd decreased by the same margin up to 1.6 per cent.

The Figure 8 illustrates the trends of Market share in fixed telephone subscriptions per operator.

**Figure 8: Market share trends for fixed telephone subscriptions per operator as of Mar-2021**



Source: Operators' reports, March 2021

### 3.2. Fixed telephone traffic

During this quarter under review, the total volume of minutes originating within operators by fixed telephone lines was 2.2 million minutes, the total minutes originating from one operator to other operators was 0.2 million minutes, and the total minutes from Rwanda fixed telephone lines to international networks was 0.1 million minutes. The number of minutes from international networks to local fixed telephone lines was 8,399 minutes.

**Table 11: Outgoing mobile and fixed telephone incoming traffic**

Voice traffic	MTN Rwanda Ltd	Airtel Rwanda Ltd	Liquid Telecom Ltd	Total
<b>Outgoing calls</b>				
On net	2,234,600	13,583	3,386	<b>2,251,569</b>
Off net	71,281	3,282	220,376	<b>294,938</b>
International	6,314	3,406	139,001	<b>148,721</b>
<b>Incoming calls</b>				
International	8,311	-	88	<b>8,399</b>

Source: Operators' reports, March 2021

### 3.3. Fixed telephone service tariff

During the first quarter of the year 2021, the average tariff for calling by fixed telephone within telecom operator was 30 Frw, while calling across telecom operators was 36.7 Frw, and 196.1 Frw to call in One Area Network Countries.

**Table 12: Fixed telephone service tariff structure (in Frw) per minute as of March 2021**

Destination	Liquid Telecom Ltd	MTN Rwanda Ltd	Airtel Rwanda Ltd	<b>Average</b>
On net	10	45	35	<b>30</b>
Off net	30	45	35	<b>36.7</b>
ONA	408.28	90	90	<b>196.1</b>

**Source: Operators' reports, March 2021**



## 4. INTERNET SERVICE PROVISION

### 4.1. Internet subscriptions<sup>4</sup>

As of March 2021, there were 8,218,987 active SIM cards subscribed to the internet and 21,272 active fixed internet subscriptions. The table below shows the internet subscriptions per operator.

**Table 13: Internet subscriptions per category as of March 2021**

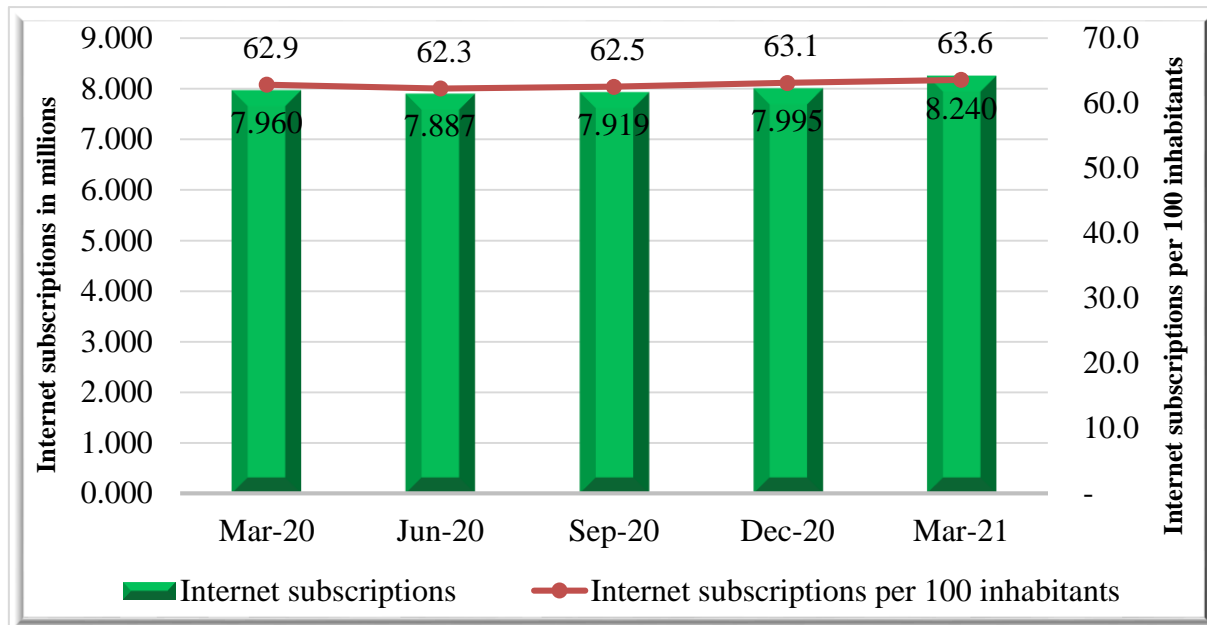
Name of operators	Fixed internet subscriptions		Mobile internet subscriptions			Total internet subscriptions
	Narrowband (≤256kbps)	Broadband (≥256kbps)	EDGE	3G	4G	
MTN Rwanda Ltd	87	2,897	3,805,683	1,258,009	23,755	5,090,431
Airtel Rwanda Ltd		1,576	2,191,439	809,608	4,151	3,006,774
Axiom Networks Ltd		144				144
4NET AFRICA Ltd		4			27	31
BCS LTD		9				9
BSC LTD		3,029			13,502	16,531
Liquid Telecom Ltd		7,671				7,671
CBNET Ltd		5			592	597
G-MAX Ltd		12			663	675
ISCO ISP Ltd		21			866	887
Net Link Ltd		1			548	549
Piramie INC		1			559	560
Simba Supermarket					201	201
Truconnect		28			1,022	1,050
BK Techouse		131			1,195	1,326
FASTNET		12			4,023	4,035
Mango Telecom Ltd		7			94,430	94,437
POPCONN Ltd		12			3,604	3,616
RTN Ltd					1,789	1,789
AC Group Ltd					100	100
Smart Broadband Ltd		1			250	251
TNSP		20			2,114	2,134
NETPRO Ltd					857	857
GVA Rwanda		5,604				5,604
<b>Total</b>	<b>87</b>	<b>21,185</b>	<b>5,997,122</b>	<b>2,067,617</b>	<b>154,248</b>	<b>8,240,259</b>
<b>Penetration rate (%)</b>	<b>0.0</b>	<b>0.2</b>	<b>46.3</b>	<b>16.0</b>	<b>1.2</b>	<b>63.6</b>

Source: Operators' reports, March 2021

<sup>4</sup> Internet subscriptions combine the number of active SIM cards (mobile internet) connected to the internet at least once within 90 days and active fixed internet subscriptions.

As of March 2021, the total number of internet subscriptions increased by 3.5 per cent up to 8.24 million from 7.960 million recorded at the end of the first quarter of the year 2020 whereas there was an increase of 3.1 percent compared to December 2020. At the end of March 2021, the internet subscriptions per 100 people stood at 63.6%.

**Figure 9: Trend of internet subscriptions and internet subscriptions per 100 inhabitants<sup>5</sup>**



Source: Operators’ reports, March 2021

At the end of March of the year 2021, the 99.6 percent of the fixed internet subscriptions are subscribed to the speed greater or equal to 256 kbps, whereas 0.4 percent of the total internet subscriptions are below 256 kbps.

**Table 14: Fixed internet subscriptions by speed**

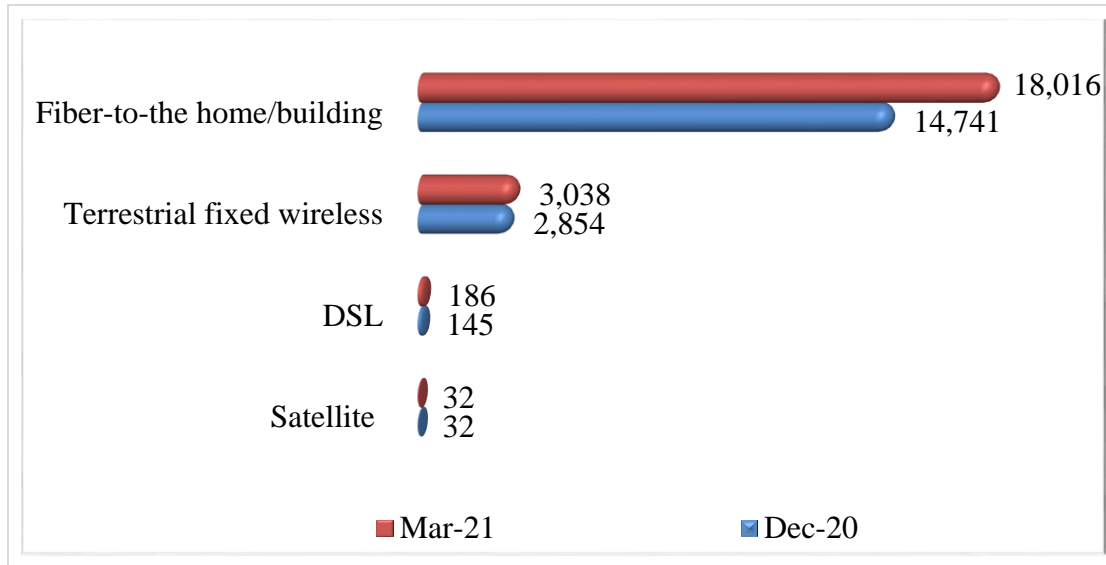
Speed	Fixed internet subscriptions	
	March 2021	December 2020
< 256 kbps	87	87
[256 kbps-2Mbps [	1,747	1,773
[2 Mbps -10 Mbps [	3,690	3,337
[10 Mbps-30Mbps [	11,625	9,633
[30 Mbps < 100Mbps [	3,964	2,789
≥ 100 Mbps	159	153
<b>Total</b>	<b>21,272</b>	<b>17,772</b>

Source: Operators’ reports, March 2021

<sup>5</sup> Internet subscriptions per 100 inhabitants: This rate is the total internet subscriptions over the Rwandan population as projected by National Institute of Statistics of Rwanda.

During the period under review, the highest number of fixed internet subscriptions was connected to the fiber-to-the home/building, whereas the lowest fixed internet subscriptions are on satellite and DSL technology.

**Figure 10: Fixed internet subscriptions by technology**

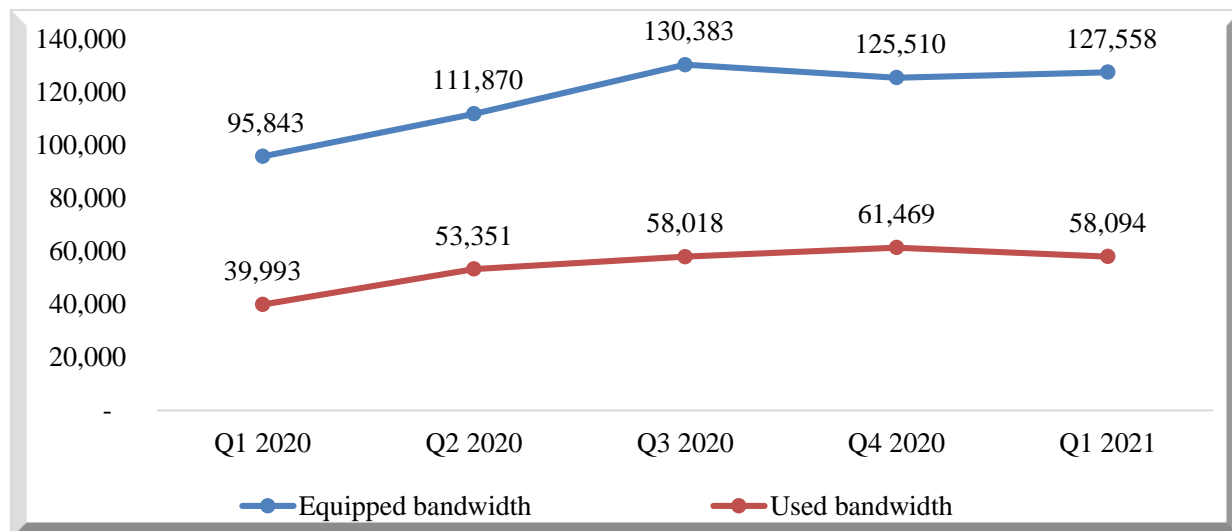


Source: Operators’ reports, March 2021

#### 4.2. International internet bandwidth

During the quarter under reporting, the total equipped international internet bandwidth available in the country was 127,558 Mbps whereas the average used internet bandwidth was 58,094 Mbps.

**Figure 11: Trend of international internet bandwidth (Mbps) from Q1 2020 to Q1 2021**

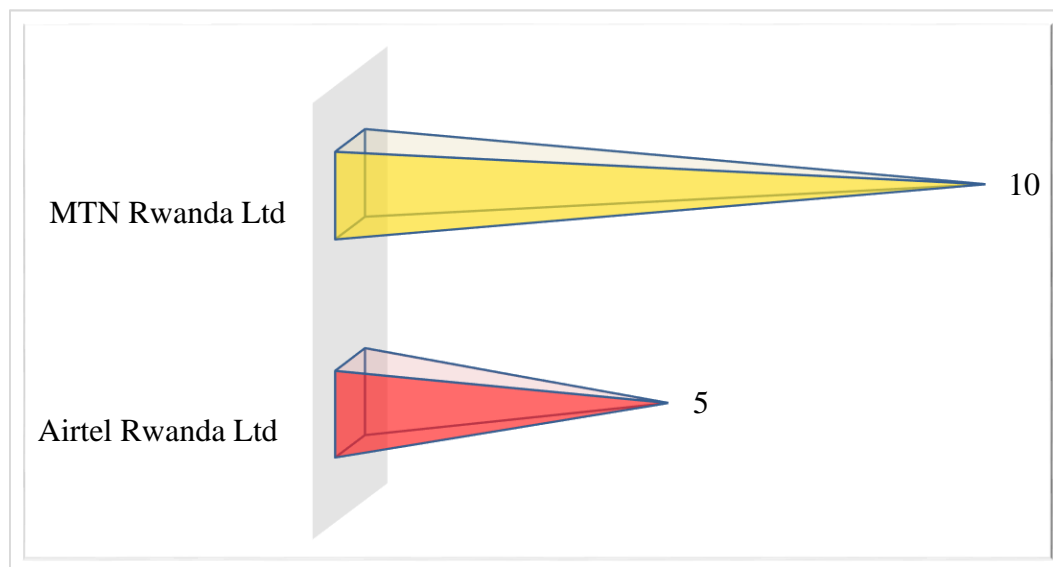


Source: Operators’ reports, March 2021

### 4.3. Mobile internet tariff

As of March 2021, the standard tariff for mobile internet per MB was at 10 Frw on MTN Rwanda Ltd and 5 Frw on Airtel Rwanda Ltd network.

**Figure 12: Standard mobile internet tariff (Frw/MB) as of March 2021**



Source: Operators' reports, March 2021

## 5. TELECOMMUNICATION REVENUES AND INVESTMENT

**Table 15: Trend of quarterly revenues (Frw) from Q2 2020 to Q1 2021**

Category	Q2 2020	Q3 2020	Q4 2020	Q1 2021
Total Revenues for MNOs and Liquid Telecom Ltd	44,860,787,018	55,865,808,070	53,148,500,338	53,716,648,207
Total revenues for ISPs and Wholesale Network Service Provider	10,132,162,379	9,708,752,820	9,347,116,675	11,764,554,517
<b>Total</b>	<b>54,992,949,398</b>	<b>65,574,560,889</b>	<b>62,495,617,014</b>	<b>65,481,202,724</b>

Source: Operators' reports, March 2021

**Table 16: Trend of additional investment (Frw) made in the first quarter 2021**

Category	Q2 2020	Q3 2020	Q4 2020	Q1 2021
Total investment for MNOs and Liquid Telecom Ltd	16,327,806,071	9,031,508,211	3,872,841,903	13,276,175,615
Total investment for ISPs and Wholesale Network Service Provider	1,185,266,915	2,157,953,517	770,344,137	790,609,760
<b>Total</b>	<b>17,513,072,986</b>	<b>11,189,461,727</b>	<b>4,643,186,039</b>	<b>14,066,785,375</b>

Source: Operators' reports, March 2021

## 6. EMPLOYMENT IN TELECOMMUNICATION SECTOR

One thousand one hundred and twenty-two (1,122) persons were employed in telecommunication sector at the end of March 2021; nine hundred seventy-nine (979) are permanent staff while one hundred forty-three (143) are temporary staff. There were also six hundred and fifty-two (652) outsourced staff employed by telecommunication sector. The table below illustrates the number of employed persons by operator.

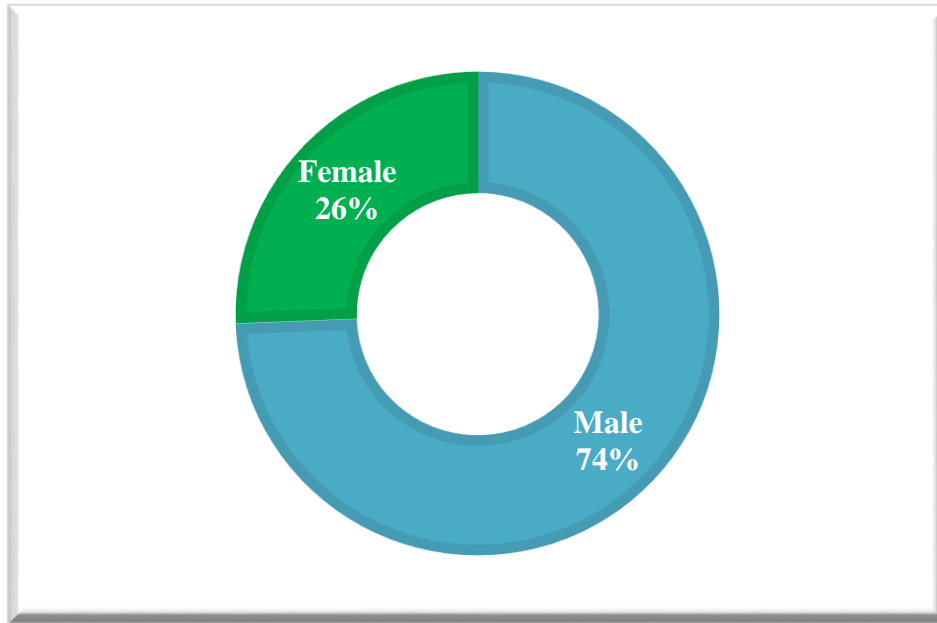
**Table 17: Number of staff employed in telecommunication sectors as of March 2021**

Operator	Type of contract			Gender		Domestic and foreign employees		Outsourced staff
	Temporary	Permanent	Total	Female	Male	Domestic	Foreign	
MTN Rwanda Ltd	7	287	294	89	205	286	8	339
Airtel Rwanda Ltd	0	127	127	15	112	121	6	242
Liquid Telecom Ltd	79	58	137	27	110	133	4	0
G-MAX	2	6	8	3	5	8	0	0
Truconnect	3	5	8	3	5	8	0	0
Axiom Networks Ltd	1	25	26	9	17	23	3	0
4NetAfrica Ltd	0	1	1	0	1	1	0	0
TNSP	22	8	30	6	24	30	0	2
KTRN Ltd	0	117	117	28	89	114	3	0
Piramie INC	0	5	5	4	1	2	3	3
POPCONN Ltd	0	14	14	4	10	13	1	0
BSC Ltd	16	61	77	19	58	77	0	0
BCS Ltd	0	1	1	0	1	1	0	0
AC Group Ltd	0	38	38	10	28	38	0	0
FASTNET	1	5	6	3	3	6	0	2
ISCO ISP Ltd	0	2	2	1	1	2	0	0
SIMBA Supermarket	0	3	3	0	3	3	0	0
BK Techouse	9	21	30	6	24	30	0	0
Mango Telecom Ltd	0	122	122	48	74	120	2	0
NET LINK LTD	1	9	10	3	7	9	1	0
CBNET Ltd	2	1	3	1	2	3	0	0
RTN	0	23	23	5	18	23	0	0
Smart Broadband Ltd	0	4	4	0	4	4	0	0
NETPRO LTD	0	5	5	2	3	5	0	0
GVA Rwanda	0	31	31	6	25	30	1	64
<b>Total</b>	<b>143</b>	<b>979</b>	<b>1,122</b>	<b>292</b>	<b>830</b>	<b>1,090</b>	<b>32</b>	<b>652</b>

Source: Operators' reports, March 2021

The two hundred ninety-two (292) staff representing 26 percent of the total staff are female whereas 74 percent are male as shown in the figure below. The three hundred sixty-seven persons (367) representing 56 per cent of the total outsourced staff are female.

**Figure 13: Telecom staff by gender as of March 2021**



**Source: Operators' reports, March 2021**

## 7. MEDIA AND BROADCASTING

The table below displays the number of licensed Television Stations, FM Radio Broadcasters, Online Media Houses, and Signal Distributors up to the end of March of the year 2021.

### 7.1. Licensed media operators

During the quarter under review, there was one (1) licensed signal distributors, four (4) pay TV operators, thirty (30) FM radio stations, eighteen (18) television stations, twenty-three (23) online media houses, thirty-one (31) print media houses, and three (3) international media houses.

**Table 18: Trends of Licensed media operators from March 2020 to March 2021**

Category	Mar-2020	Jun-2020	Sep-2020	Dec-2020	Mar-2021
Signal distributors	2	2	2	1	1
Pay TV operators	3	3	3	4	4
FM Radio stations	34	34	35	29	30
Television stations	18	19	19	19	18
Online media houses	23	23	23	23	23
Print media houses	31	31	31	31	31
International media house	3	3	3	3	3

Source: RURA database

### 7.2. Pay TV subscriptions

The total number of registered subscribers at the end of the first quarter of the year 2021 was 344,018 whereas active subscribers were 68,342.

**Table 19: Number of Pay TV subscribers as of March 2021**

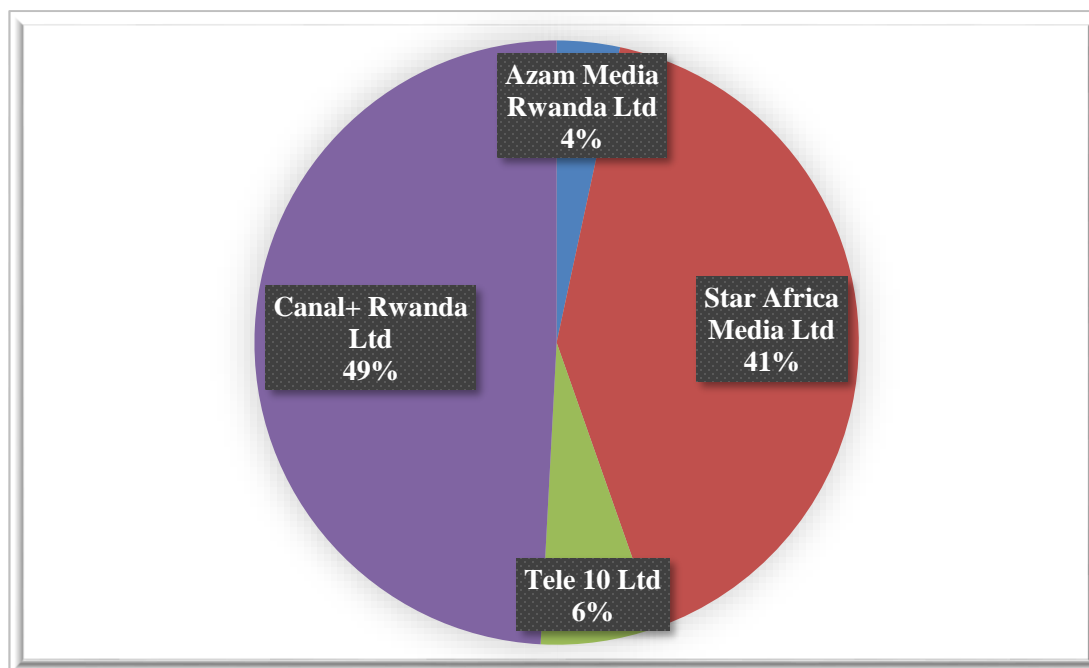
Name of Pay TV	Registered subscribers	Active <sup>6</sup> subscribers
Azam Media Rwanda Ltd	14,171	2,306
Star Africa Media Co., Ltd	267,329	28,184
Tele 10 Ltd	4,382	4,258
Canal+ Rwanda Ltd	58,136	33,594
<b>Total</b>	<b>344,018</b>	<b>68,342</b>

Source: Operators' reports, March 2021

<sup>6</sup> Active subscribers are the customers that generated revenues to the Pay TV operators during the reporting period.

As of March 2021, the market shares for Canal+ Rwanda Ltd in active Pay TV subscriptions was 49%, 41% for Star Africa Media Co., Ltd, 6% for Tele 10 Ltd, and 4% for Azam Media Rwanda Ltd.

**Figure 14: Market share for Pay TV active subscribers per operator as of March 2021**



Source: Operators' reports, March 2021

### 7.3. Decoders sold

During the first quarter of 2021, the number of decoders sold by Pay TV operators increased to sixteen thousand nine hundred and eighty-six (16,986) from nine thousand four hundred and forty-nine (9,449) recorded in the previous quarter.

**Table 20: Trend of decoders sold from 1<sup>st</sup> quarter 2020 to 1<sup>st</sup> quarter of 2021**

Number of Decoders Sold	Q1 2020	Q2 2020	Q3 2020	Q4 2020	Q1 2021
Azam Media Rwanda Ltd	117	98	110	76	94
Star Africa Media Co., Ltd	5,618	3,193	4,983	3,687	4,219
Tele 10 Ltd	365	444	269	382	1,056
Canal+ Rwanda Ltd	-	-	-	5,304	11,617
<b>Total</b>	<b>6,100</b>	<b>3,735</b>	<b>5,362</b>	<b>9,449</b>	<b>16,986</b>

Source: Operators' reports, March 2021



#### 7.4. Pay TV staff

The total number of staff employed by Pay TV operators as of March 2021 was 170 of which 60.6% are employed by Star Africa Media Co., Ltd, 23.5% by Canal+ Rwanda Ltd, 10.0% by Tele 10 Ltd, and 5.9% are employed by Azam Media Rwanda Ltd. The fifty-three (53) staff representing 31.2% of the total staff are female.

**Table 21: Number of staff employed in Pay TV operators as of March 2021**

Operator	Staff per type of contract			Staff per gender		Origin	
	Temporary	Permanent	Total	Female	Male	Domestic	Foreign
Azam Media Rwanda Ltd	0	10	10	2	8	9	1
Star Africa Media Co., Ltd	0	103	103	25	78	96	7
Tele 10 Ltd	0	17	17	7	10	17	0
Canal+ Rwanda Ltd	1	39	40	19	21	35	5
<b>Total</b>	<b>1</b>	<b>169</b>	<b>170</b>	<b>53</b>	<b>117</b>	<b>157</b>	<b>13</b>

Source: Operators' reports, March 2021