



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

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

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## 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 starting from 1<sup>st</sup> October to 31<sup>st</sup> December 2021.

**Table 1: Key ICT indicators**

INDICATORS	Q3 2021	Q4 2021	% change between Q3 and Q4
<b>SUBSCRIPTIONS</b>			
Mobile subscriptions	11,032,690	10,902,989	-1.18
Fixed subscriptions	11,657	11,893	2.02
Mobile (SIM) penetration rate (%)	85.16	84.16	-1.18
Fixed telephone penetration rate (%)	0.0900	0.0918	2.02
<b>VOICE TRAFFIC IN MINUTES</b>			
On-Net Voice Traffic	7,162,712,215	6,429,344,136	-10.24
Outgoing Off-Net Voice Traffic	261,137,323	302,624,192	15.89
International Outgoing mobile voice traffic	12,790,452	7,500,119	-41.36
International Incoming mobile voice traffic	14,846,441	18,105,627	21.95
<b>ROAMING SUBSCRIBERS</b>			
Roaming-in (Foreign subscribers)	1,043,059	1,159,740	11.19
Roaming-Out (Own subscribers)	1,030,688	1,018,172	-1.21
<b>ROAMING TRAFFIC</b>			
Total incoming minutes for roamers	36,473,560	35,014,728	-4.00
Total outgoing minutes for roamers	1,976,232	2,039,205	3.19
<b>SMS TRAFFIC</b>			
On-net SMS	886,388,109	857,988,475	-3.20
Outgoing Off-net SMS	6,969,939	9,036,892	29.66
Outgoing International SMS	620,742	791,559	27.52
Incoming International SMS	1,679,737	2,335,740	39.05
<b>DATA/INTERNET</b>			
Internet subscriptions	8,552,211	8,348,781	-2.38
Internet subscriptions per 100 inhabitants	66.0	64.4	-2.38
Equipped international internet bandwidth (Mbps)	156,190	155,127	-0.68
Used international internet bandwidth (Mbps)	75,313	80,013	6.24
<b>MEDIA AND BROADCASTING</b>			
Number of Television stations	19	19	0.00
Number of Radio FM stations	30	31	3.33
Active Pay TV subscribers	79,295	90,126	13.66
Registered Pay TV subscribers	392,504	362,693	-7.60

Source: Operators' reports

## 1. MOBILE TELEPHONE SERVICES

### 1.1. Mobile subscriptions

During the fourth quarter of the year 2021, the operators providing mobile telephone services were MTN Rwanda Ltd and Airtel Rwanda Ltd. The number of active mobile subscriptions reported at the end of December 2021 were 10.9 million SIM cards.

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

Name of operator	December 2020			December 2021			Quarterly Variation
	Postpaid	Prepaid	Total	Postpaid	Prepaid	Total	
MTN Rwanda Ltd	83,141	6,473,932	6,557,073	123,340	6,831,183	6,954,523	<b>-0.1%</b>
Airtel Rwanda Ltd	4,725	4,052,610	4,057,335	4,910	3,943,556	3,948,466	<b>-3.0%</b>
<b>Total</b>	<b>87,866</b>	<b>10,526,542</b>	<b>10,614,408</b>	<b>128,250</b>	<b>10,774,739</b>	<b>10,902,989</b>	<b>-1.2%</b>

**Source: Operators' reports**

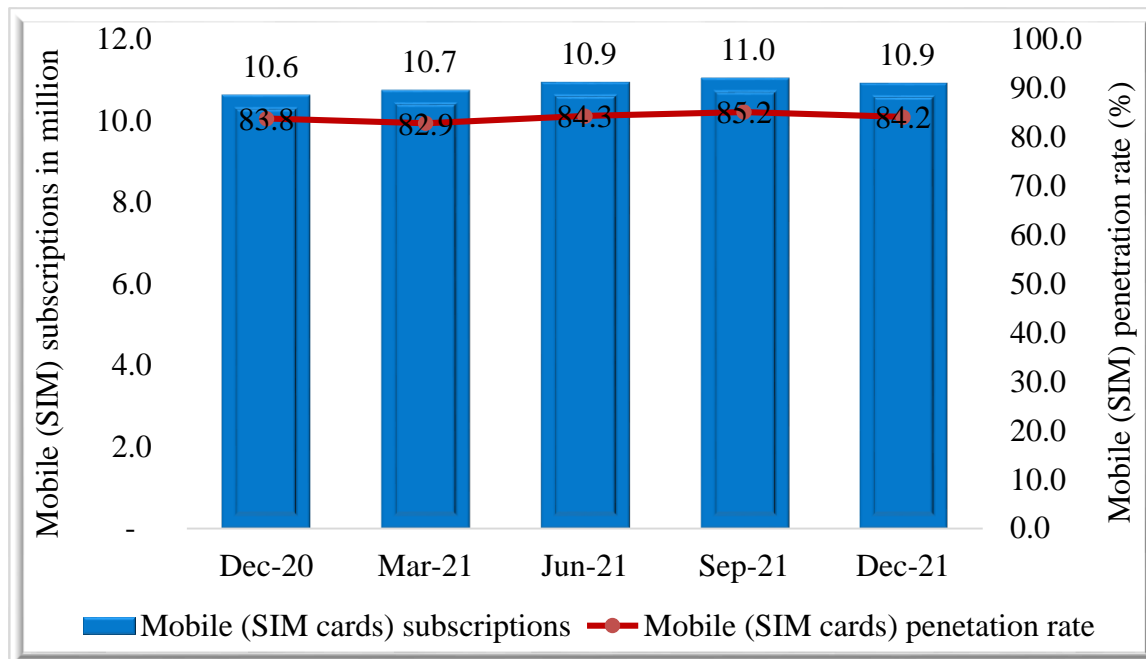
As of December 2021, the number of active mobile subscriptions in the country increased up to 10.9 million from 10.6 million active SIM cards reported at the end of December 2020. The active mobile-cellular telephone (SIM cards) subscriptions per 100 people increased from 83.8% reported at the end of December 2020 to 84.2% as of December 2021.

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

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

**Figure 1: Trend of mobile subscriptions and penetration rate<sup>2</sup> from Q4 2020 to Q4 2021**

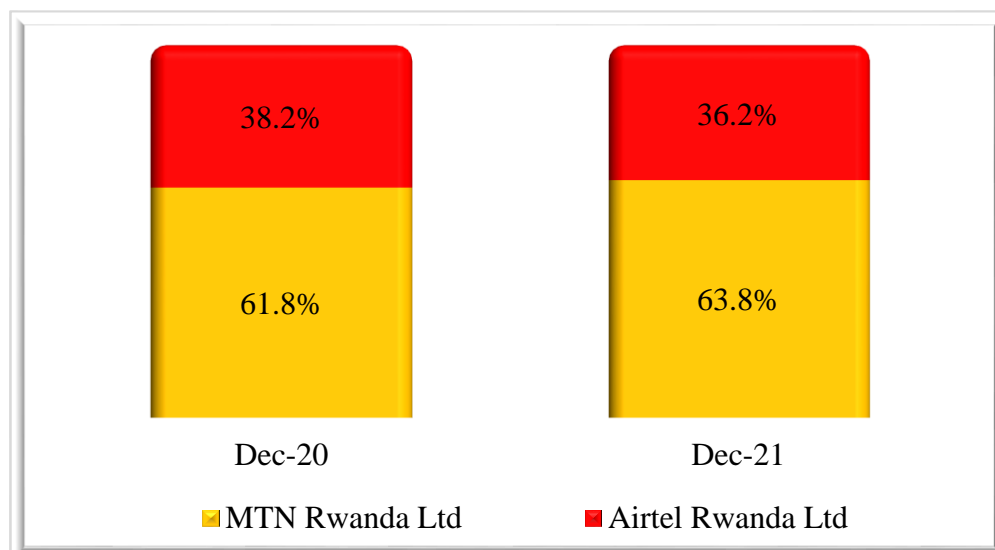


Source: Operators’ reports

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

At the end of fourth quarter of 2021, the market shares in terms of active SIM cards for MTN Rwanda Ltd increased by 2.0 percentage points up to 63.8 percent, whereas that for Airtel Rwanda Ltd dropped by the same margin reaching 36.2 percent compared to the fourth quarter of 2020.

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



Source: Operators’ reports

<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.

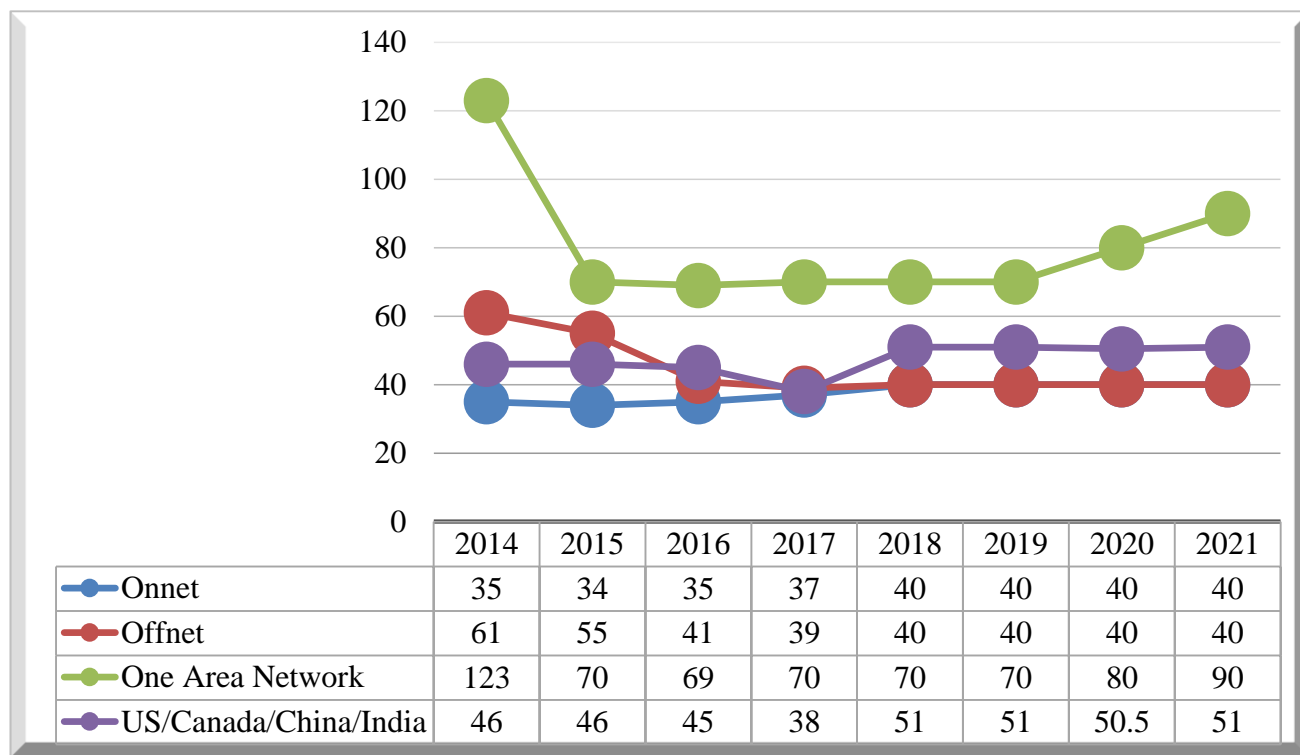
**Table 3: Mobile telephone voice tariff (in Frw) per minute per operator as of December 2021**

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

Source: Operators' reports

During this year, 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 was 90 Frw/min.

**Figure 3: Trend of average mobile voice tariff (in Frw) per minute**



Source: Operators' reports



During the fourth 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, 47 Frw, and 84.5 respectively. A subscriber on Airtel Rwanda’s network can send a short text message to its Africa sister companies ‘subscribers at 26 Frw.

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

SMS Tariff	MTN Rwanda Ltd	Airtel Rwanda Ltd	Average
Onnet tariff	12	5	<b>8.5</b>
Offnet tariff	26	15	<b>20.5</b>
ONA	54	40	<b>47.0</b>
Rest of the World	90	79	<b>84.5</b>

Source: Operators’ reports

## 1.4. Mobile traffic statistics

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

During the fourth quarter of the year 2021, the total volume of minutes originating within mobile networks was 6.4 billion minutes, the total minutes originating from one mobile networks to other networks was 302.4 million minutes, and the total minutes from mobile networks to international networks was 7.4 million minutes. The number of minutes from international networks to local mobile networks was 18.1 million minutes.

**Table 5: Outgoing and incoming traffic per operator as of the 4<sup>th</sup> quarter 2021**

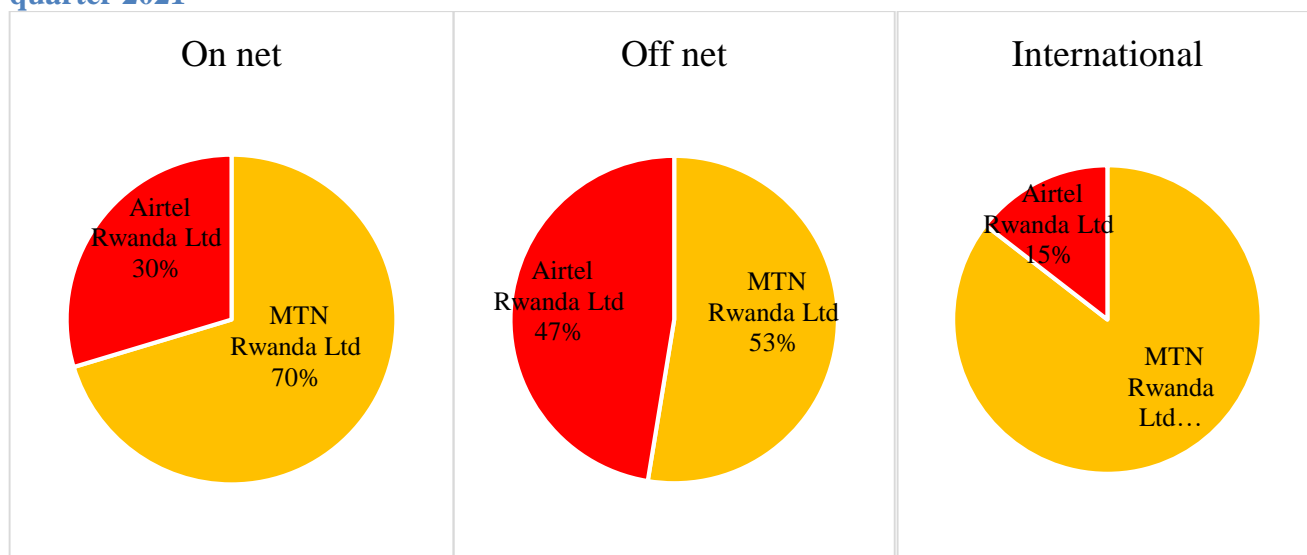
Voice traffic	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Outgoing minutes			
On net	4,515,230,819	1,903,142,684	<b>6,418,373,502</b>
Off net	159,013,349	143,386,834	<b>302,400,182</b>
International	6,398,155	1,086,883	<b>7,485,038</b>
Incoming minutes			
International	8,200,648	9,903,593	<b>18,104,240</b>

Source: Operators’ reports

### 1.4.2. Market shares for mobile outgoing voice traffic

During the quarter under review, the 70% of the total on net minutes generated by mobile networks were from MTN Rwanda Ltd and 30% from Airtel Rwanda Ltd. The off net minutes ‘market shares for MTN Rwanda Ltd and Airtel Rwanda Ltd was 53% and 47% respectively. The 85% of minutes from local mobile networks to international networks are generated by MTN Rwanda Ltd while the remaining 15% are for Airtel Rwanda Ltd.

**Figure 4: Outgoing on net, off net and international voice traffic’s market share as of the 4th quarter 2021**



Source: Operators’ reports

### 1.4.3. Average calling time (Minutes/call)

During the fourth quarter of 2021, the average minutes per call within mobile telecom networks was 2.5, average minutes per call to call other networks was 1.4 while the average minutes per call from Rwanda mobile networks to international networks was 2.7. Further, the average minutes per call from international networks to Rwanda mobile networks was 2.6.

**Table 6: Average minutes per call per operator in the 4<sup>th</sup> quarter 2021**

Voice traffic	MTN Rwanda Ltd	Airtel Rwanda Ltd	Combined
Average outgoing minutes per call			
On net	2.3	2.9	<b>2.5</b>
Off net	1.6	1.6	<b>1.6</b>
International	2.8	2.0	<b>2.7</b>
Average incoming minutes per call			
International	2.2	3.0	<b>2.6</b>

Source: Operators’ reports

#### 1.4.4. Outgoing and incoming international SMS traffic

During the fourth quarter of the year 2021, the total volume of SMS traffic originating within mobile networks was 857.9 million SMS, the total SMS traffic originating from mobile networks to other mobile networks was 9.0 million SMS and the total SMS traffic from mobile networks to international networks was 0.7 million SMS. The number of SMS from international networks to Rwanda was 2.3 million SMS.

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

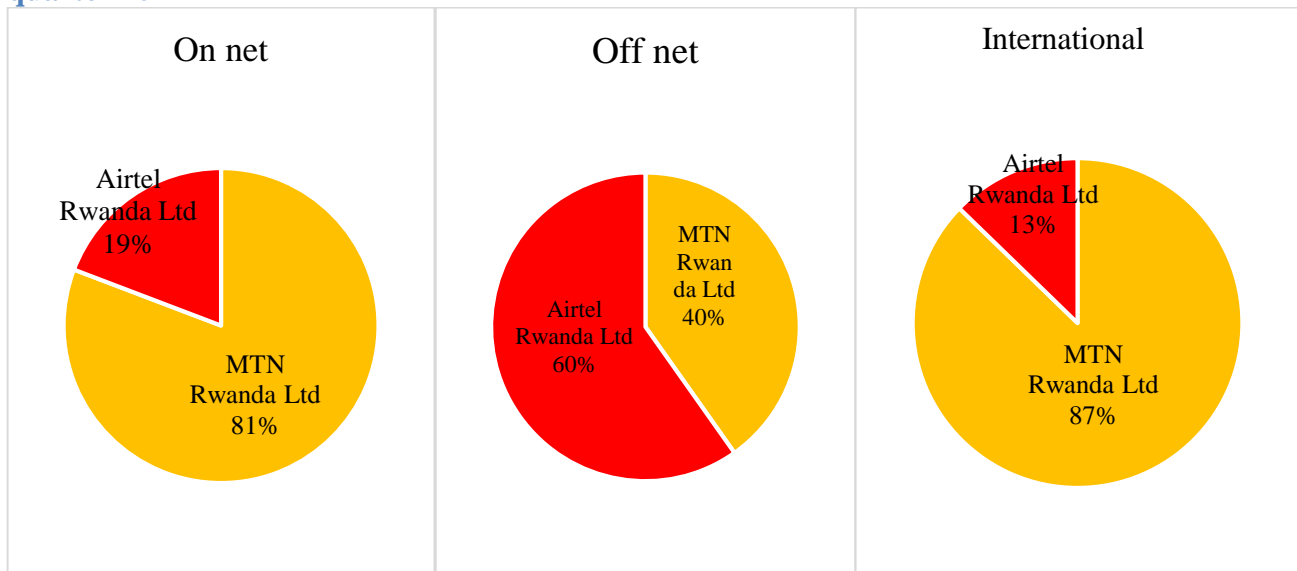
Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
<b>Outgoing SMS</b>			
On net	693,117,687	164,870,788	<b>857,988,475</b>
Off net	3,633,764	5,403,128	<b>9,036,892</b>
International	690,721	100,838	<b>791,559</b>
<b>Incoming SMS</b>			
International	457,896	1,877,844	<b>2,335,740</b>

Source: Operators' reports

#### 1.4.5. Market shares for outgoing on net, off net and international SMS traffic

During the quarter under review, the 81% of the total on net SMS were for MTN Rwanda Ltd and 19% of Airtel Rwanda Ltd. The 60% of off net SMS were from MTN Rwanda Ltd whereas the 40% were from Airtel Rwanda Ltd. The 87% and 13% of SMS from local mobile networks to international networks are generated by MTN Rwanda Ltd and Airtel Rwanda Ltd respectively.

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



Source: Operators' reports

## 2. ROAMING

### 2.1. Roaming subscribers

The international roaming subscribers during the fourth quarter of the year 2021 stood at 1.1 million foreign subscribers roamed on local networks whereas 1.0 million Rwanda subscribers roamed on foreign networks.

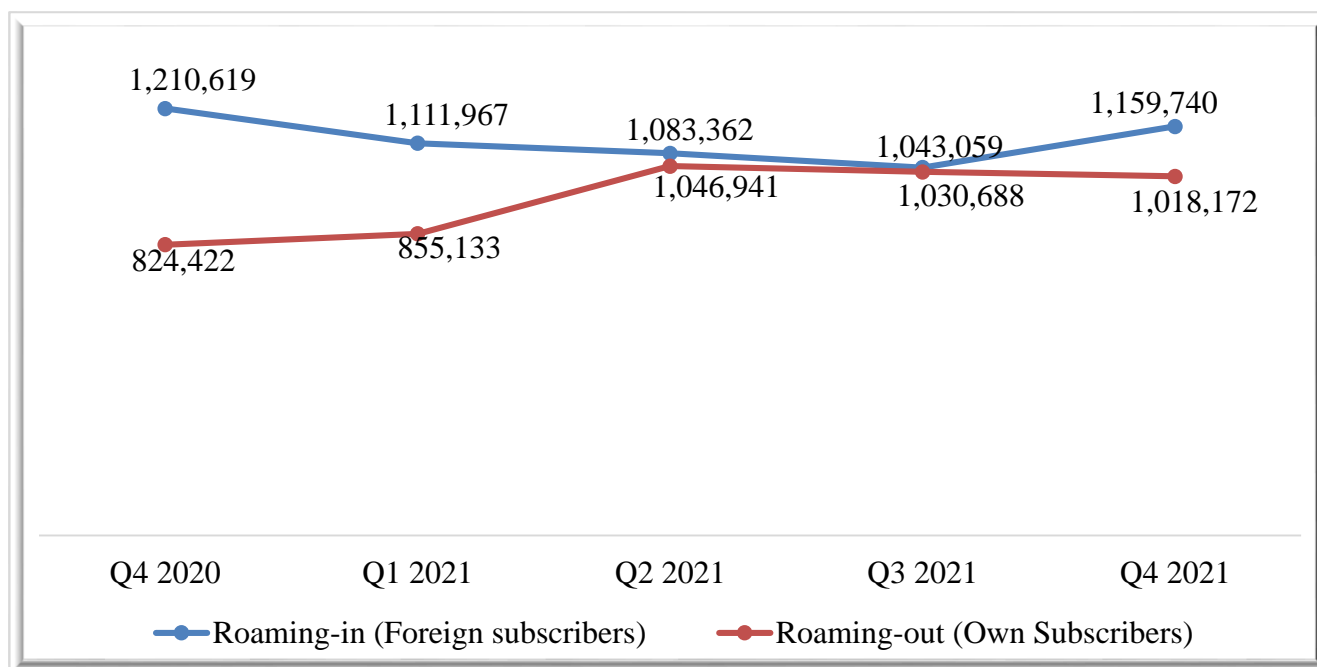
**Table 8: International roaming subscribers as of the fourth quarter 2021**

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Roaming-in (Foreign subscribers)	810,083	349,657	<b>1,159,740</b>
Roaming-out (Own Subscribers)	933,205	84,967	<b>1,018,172</b>

Source: Operators' reports

During the fourth quarter 2021, the number of roamers-out decreased to 1,018,172 from 1,030,688 subscribers representing a decrease of 1.2% and the number of roamers-in increased to 1,159,740 from 1,043,059 subscribers recorded during the previous quarter, which is equivalent to 11.2 percent.

**Figure 6: Trend of roaming subscribers from Q4 2020 to Q4 2021**



Source: Operators' reports

## 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 1.0 million minutes. On the other hand, the total incoming traffic on foreign subscribers roamed in Rwanda was 16.6 million minutes and the incoming minutes to Rwanda subscribers roamed on foreign networks was 18.3 million.

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

Destination	Foreign subscribers roaming on local networks			Own subscribers roaming on foreign networks		
	MTN	Airtel	Total	MTN	Airtel	Total
Incoming	3,969,665	12,699,897	16,669,562	16,900,200	1,444,966	18,345,166
Outgoing	696,824	335,697	1,032,521	979,147	27,538	1,006,685
<b>Total</b>	<b>4,666,489</b>	<b>13,035,594</b>	<b>17,702,083</b>	<b>17,879,347</b>	<b>1,472,504</b>	<b>19,351,851</b>

Source: Operators' reports

## 3. FIXED TELEPHONE SERVICES

### 3.1. Fixed telephone subscriptions

During the fourth 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 December 2021**

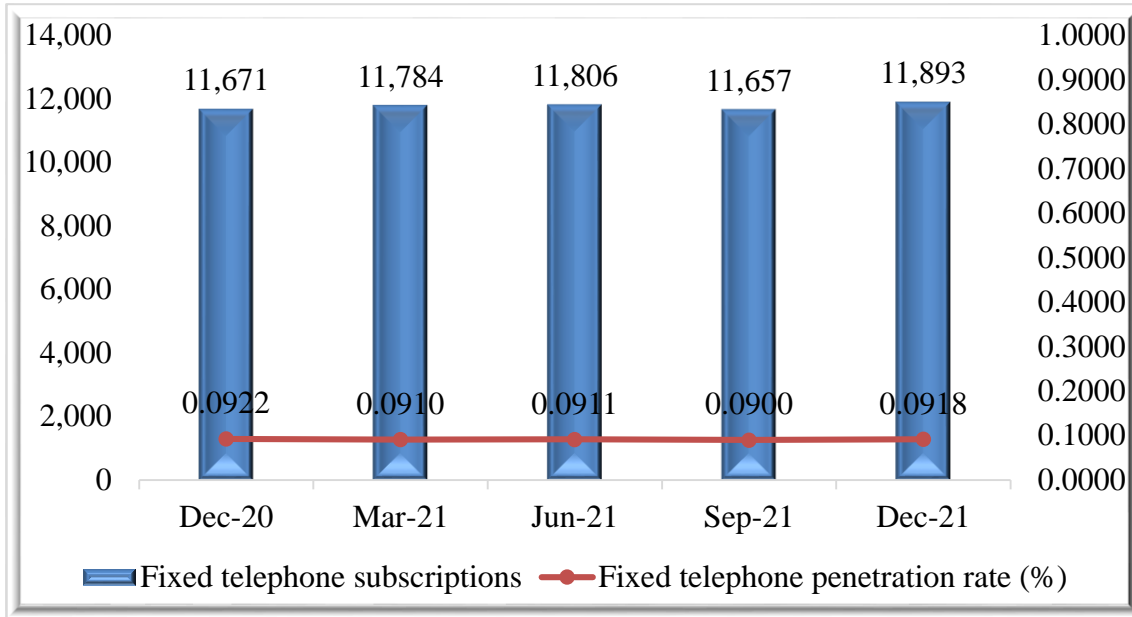
Name of Operator	Fixed telephone subscriptions	Fixed telephone penetration rate (%) <sup>3</sup>
MTN Rwanda Ltd	184	<b>0.0918</b>
Airtel Rwanda Ltd	9,521	
Liquid Telecom Ltd	927	
BSC Ltd	1,261	
<b>Total</b>	<b>11,893</b>	

Source: Operators' reports

At the end of December 2021, the number of fixed telephone subscriptions decreased up to 11,893 from 11,671 published at the end of the fourth quarter of 2020. The fixed telephone subscriptions per 100 people also decreased to 0.0918% from 0.0922%.

<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.

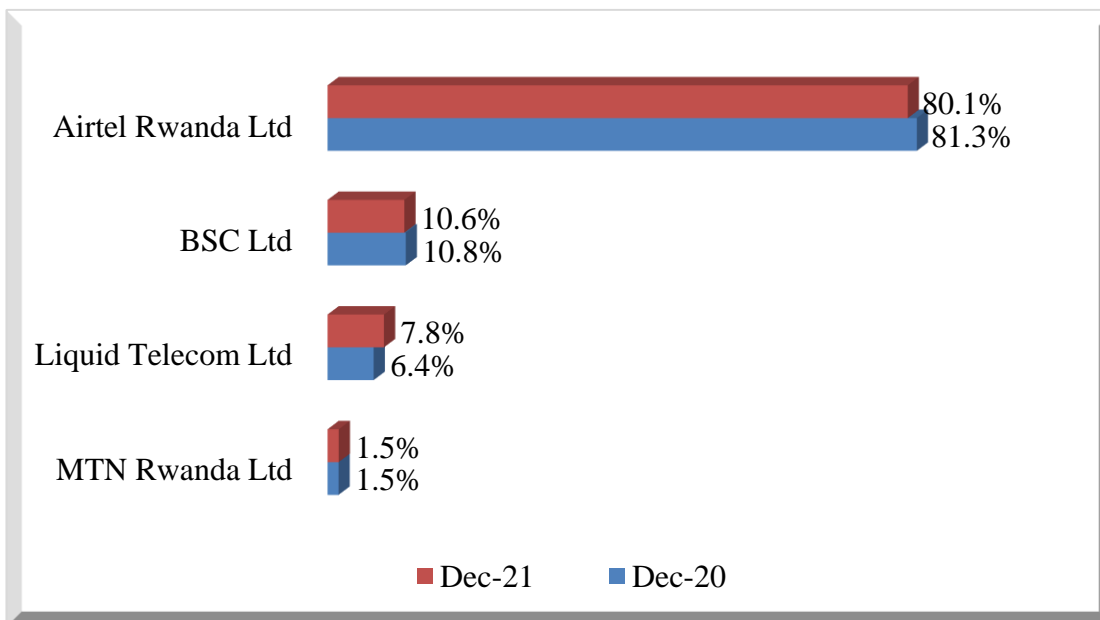
**Figure 7: Trend of fixed telephone subscriptions and penetration rate**



Source: Operators' reports

As of December 2021, the market shares in fixed telephone subscriptions for Airtel Rwanda Ltd decreased by 1.2 percentage points to 80.1 percent, and that for BSC Ltd declined by 0.2 percentage points to 10.6 per cent. The market shares for Liquid Telecom Ltd increased by 1.4 percentage points to 7.8 percent whereas that for MTN Rwanda Ltd remained constant at 1.5 per cent in comparison to the publications of the fourth quarter of 2020.

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



Source: Operators' reports

### 3.2. Fixed telephone traffic

During this quarter under review, the total volume of minutes originating within operators by fixed telephone lines was 10.9 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 15,081 minutes. The number of minutes from international networks to local fixed telephone lines was 1,387 minutes.

**Table 11: Outgoing mobile and fixed telephone incoming traffic as of 4<sup>th</sup> quarter 2021**

Voice traffic	MTN Rwanda Ltd	Airtel Rwanda Ltd	Liquid Telecom Ltd	Total
<b>Outgoing minutes</b>				
On net	10,757,136	208,706	4,791	<b>10,970,633</b>
Off net	95	236	223,678	<b>224,009</b>
International	153	2,974	11,954	<b>15,081</b>
<b>Incoming minutes</b>				
International	146	-	1,241	<b>1,387</b>

Source: Operators' reports

### 3.3. Fixed telephone service tariff

During the fourth 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 December 2021**

Destination	Liquid Telecom Ltd	MTN Rwanda Ltd	Airtel Rwanda Ltd	Average
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

## 4. INTERNET SERVICE PROVISION

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

There were 8,316,792 active SIM cards subscribed to the internet within 90 days and 31,989 active fixed internet subscriptions during the fourth quarter of year 2021. The table below shows the internet subscriptions per operator.

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

Name of operators	Fixed internet subscriptions		Mobile internet subscriptions			Total internet subscriptions
	Narrowband ( $\leq 256$ kbps)	Broadband ( $\geq 256$ kbps)	GPRS&EDGE	3G	4G	
MTN Rwanda Ltd	87	5,163	4,121,429	1,100,761	83,876	5,311,316
Airtel Rwanda Ltd		1,107	2,211,213	691,930	4,936	2,909,186
Axiom Networks Ltd		128				128
4NET AFRICA Ltd		2			10	12
BSC LTD		3,130			15,590	18,720
Liquid Telecom Ltd		10,242				10,242
CBNET Ltd		9			714	723
G-MAX Ltd		8			855	863
ISCO ISP Ltd		18			675	693
Net Link Ltd		2			802	804
Piramie INC		1			677	678
Simba Supermarket					143	143
KOPA Telecom		33			1,492	1,525
BK Techouse		133			1,212	1,345
FASTNET		10			4,990	5,000
Mango Telecom Ltd		13			66,417	66,430
POPCONN Ltd		13			3,754	3,767
RTN Ltd					2,164	2,164
Smart Broadband Ltd					458	458
TNSP		25			2,015	2,040
NETPRO Ltd					679	679
GVA Rwanda		11,865				11,865
<b>Total</b>	<b>87</b>	<b>31,902</b>	<b>6,332,642</b>	<b>1,792,691</b>	<b>191,459</b>	<b>8,348,781</b>
<b>Penetration rate (%)</b>	<b>0.0</b>	<b>0.25</b>	<b>48.9</b>	<b>13.8</b>	<b>1.5</b>	<b>64.4</b>

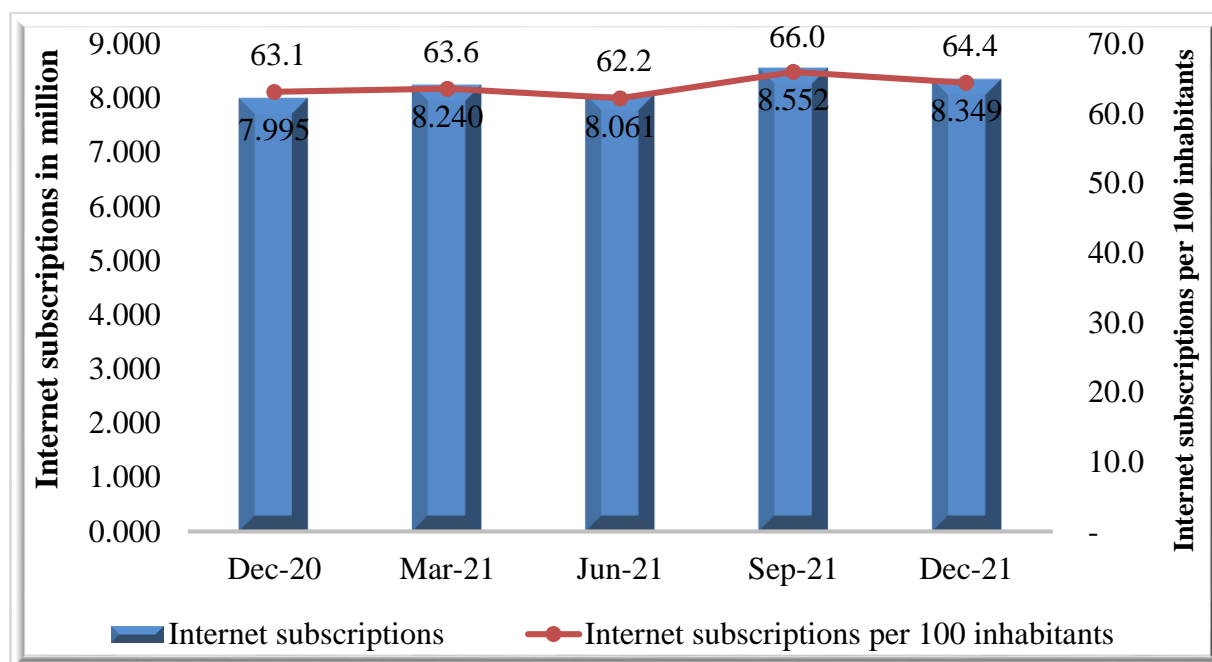
Source: Operators' reports

<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 December 2021, the total number of internet subscriptions increased by 4.4% to reach 8.34 million from 7.99 million reported at the end of the fourth quarter of the year 2020 while there was a decline of 2.4% compared to the third quarter of 2021. At the end of December 2021, the internet subscriptions per 100 inhabitants decreased by 1.6 percentage points to 64.4% in comparison to the third quarter of 2021.

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



**Source: Operators' reports**

As of December 2021, the fixed internet subscriptions increased by 80.0% compared to the last quarter of the year 2020. The 99.7% of total fixed internet subscriptions were subscribed to the speed greater or equal to 256 kbps while the 0.3% was below 256 kbps.

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

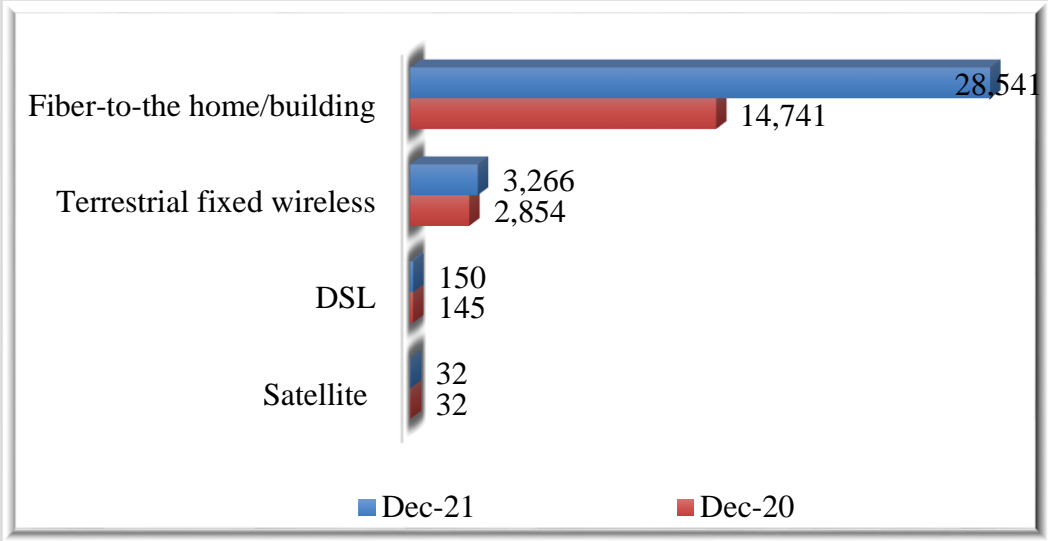
Speed	Fixed internet subscriptions	
	Dec 2020	December 2021
< 256 kbps	87	87
[256 kbps-2Mbps [	1,773	1,618
[2 Mbps -10 Mbps [	3,337	4,367
[10 Mbps-30Mbps [	9,633	21,871
[30 Mbps < 100Mbps [	2,789	3,798
≥ 100 Mbps	153	248
<b>Total</b>	<b>17,772</b>	<b>31,989</b>

**Source: Operators' reports**

<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**

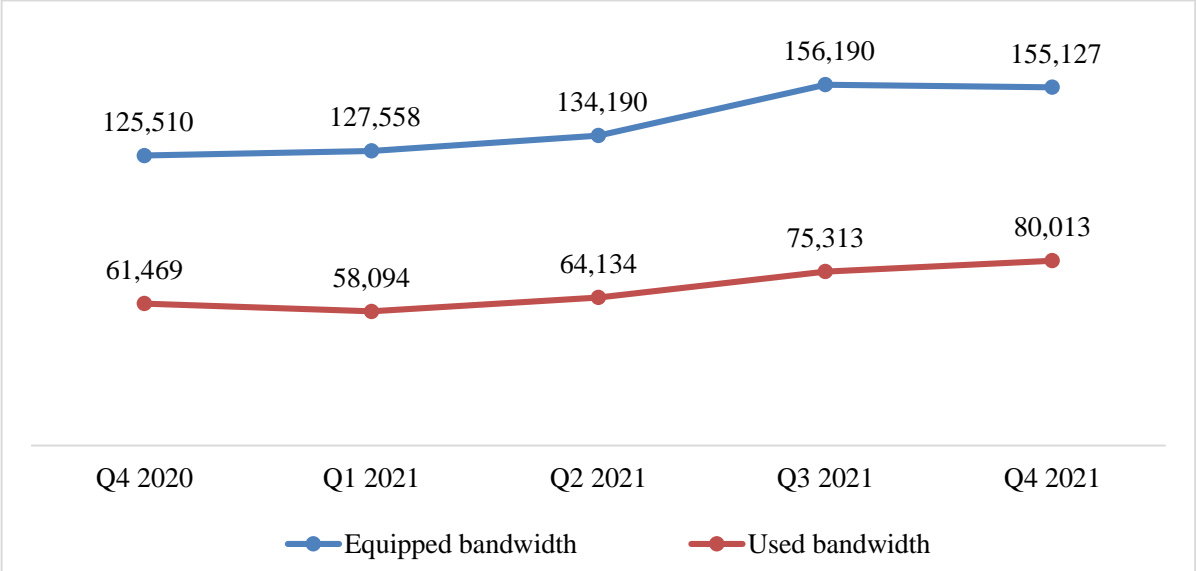


Source: Operators’ reports

**4.2. International internet bandwidth**

During the fourth quarter of 2021, the total equipped international internet bandwidth available in the country was 155,127 Mbps whereas the average used internet bandwidth was 80,013 Mbps.

**Figure 11: Trend of international internet bandwidth (Mbps) from Q4 2020 to Q4 2021**

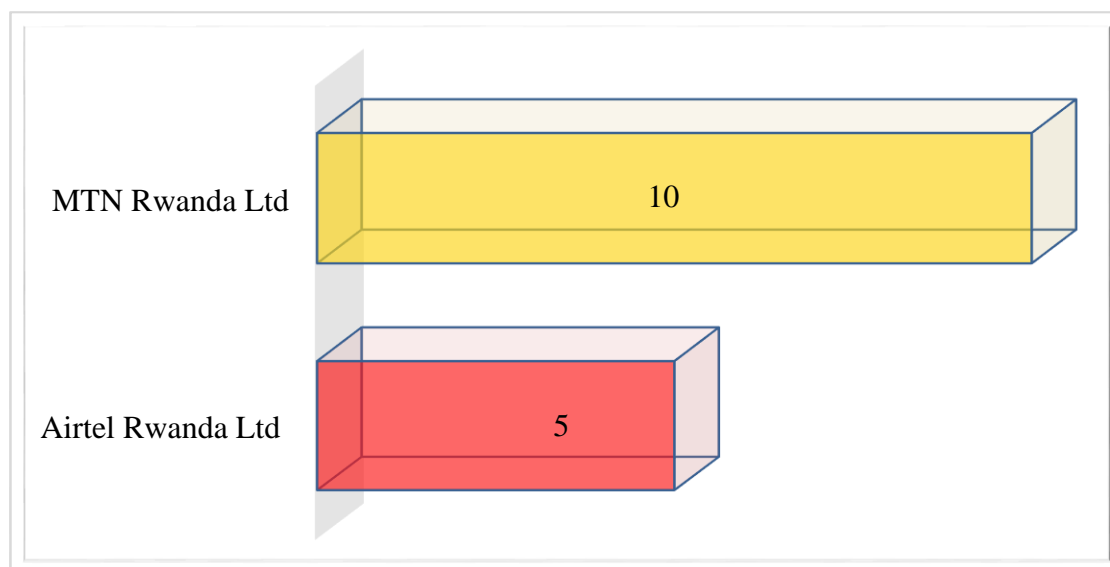


Source: Operators’ reports

### 4.3. Mobile internet tariff

In the fourth quarter 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 December 2021**



Source: Operators' reports

## 5. TELECOMMUNICATION REVENUES AND INVESTMENT

**Table 15: Trend of quarterly revenues (Frw) from Q1 to Q4 2021**

Category	Q1 2021	Q2 2021	Q3 2021	Q4 2021
Total Revenues for MNOs and Liquid Telecom Ltd	53,716,648,207	58,950,402,035	61,678,226,278	63,756,099,092
Total revenues for ISPs and Wholesale Network Service Provider	11,764,554,517	11,982,790,758	13,709,906,615	13,474,024,475
<b>Total</b>	<b>65,481,202,724</b>	<b>70,933,192,793</b>	<b>75,388,132,893</b>	<b>77,230,123,567</b>

Source: Operators' reports

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

Category	Q1 2021	Q2 2021	Q3 2021	Q4 2021
Total investment for MNOs and Liquid Telecom Ltd	13,276,175,615	12,139,912,422	6,579,991,535	13,275,040,916
Total investment for ISPs and Wholesale Network Service Provider	790,609,760	370,652,560	451,433,066	609,632,013
<b>Total</b>	<b>14,066,785,375</b>	<b>12,510,564,982</b>	<b>7,031,424,601</b>	<b>13,884,672,929</b>

Source: Operators' reports

## 6. EMPLOYMENT IN TELECOMMUNICATION SECTOR

One thousand one hundred forty-seven (1,147) persons were employed in telecommunication sector at the end of December 2021; one thousand forty-four (1,044) are permanent staff whereas one hundred and three (103) are temporary staff. There were also six hundred seventy-six (676) outsourced staff employed by telecommunication sector. The table below illustrates the number of employed persons by operator.

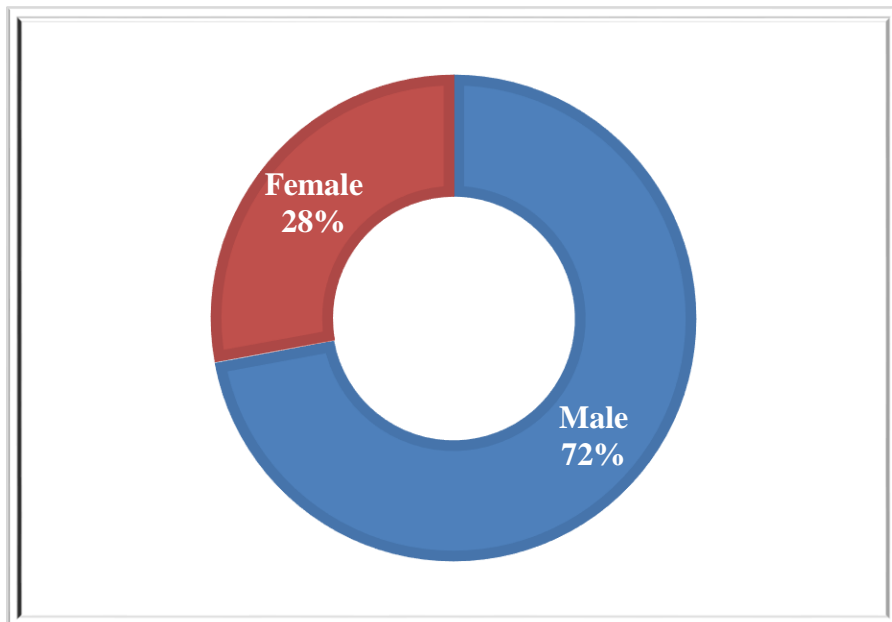
**Table 17: Number of staff employed in telecommunication sectors as of December 2021**

Operator	Type of contract			Gender		Domestic and foreign employees		Outsourced staff
	Temporary	Permanent	Total	Female	Male	Domestic	Foreign	
MTN Rwanda Ltd	7	306	313	100	213	308	5	354
Airtel Rwanda Ltd	0	124	124	16	108	121	3	231
Liquid Telecom Ltd	48	58	106	25	81	102	4	0
G-MAX	0	8	8	3	5	8	0	0
KOPA Telecom	3	5	8	3	5	8	0	1
Axiom Networks Ltd	1	23	24	7	17	22	2	0
4NetAfrica Ltd	0	4	4	1	3	4	0	0
TNSP	21	7	28	5	23	28	0	2
KTRN Ltd	0	115	115	26	89	112	3	3
Piramie INC	0	6	6	4	2	4	2	2
POPCONN Ltd	0	14	14	4	10	13	1	0
BSC Ltd	11	67	78	20	58	78	0	0
BCS Ltd	0	1	1	0	1	1	0	0
AC Group Ltd	0	38	38	10	28	38	0	0
FASTNET	0	6	6	3	3	6	0	4
ISCO ISP Ltd	0	2	2	1	1	2	0	0
SIMBA Supermarket	0	3	3	0	3	3	0	0
BK Techouse	9	30	39	5	34	39	0	0
Mango Telecom Ltd	0	140	140	62	78	139	1	0
NET LINK LTD	1	9	10	3	7	10	0	0
CBNET Ltd	2	1	3	1	2	3	0	0
RTN	0	20	20	6	14	20	0	0
Smart Broadband Ltd	0	4	4	0	4	4	0	0
NETPRO LTD	0	5	5	3	2	5	0	0
GVA Rwanda	0	48	48	12	36	47	1	79
<b>Total</b>	<b>103</b>	<b>1044</b>	<b>1,147</b>	<b>320</b>	<b>827</b>	<b>1,125</b>	<b>22</b>	<b>676</b>

Source: Operators' reports

The three hundred twenty (320) staff representing 28% of the total staff are female whereas 72% are male as shown in the figure below. The three hundred and three persons (303) representing 45% per cent of the total outsourced staff are female.

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



**Source: Operators' reports**

## 7. MEDIA AND BROADCASTING

The table below illustrates the number of licensed Television Stations, FM Radio Broadcasters, Online Media Houses, Pay TV operators, print media houses, International media house, and Signal Distributors up to the end of December of the year 2021.

### 7.1. Licensed media operators

During the fourth quarter of 2021, there was one (1) licensed signal distributors, four (4) pay TV operators, thirty-one (31) FM radio stations, nineteen (19) television stations, twenty-four (24) online media houses, thirty-two (32) print media houses, and three (3) international media houses.

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

Category	Dec-2020	Mar-2021	June-2021	Sep-2021	Dec-2021
Signal distributors	1	1	1	1	1
Pay TV operators	4	4	4	4	4
FM Radio stations	29	30	30	30	31
Television stations	19	18	19	19	19
Online media houses	23	23	23	23	24
Print media houses	31	31	32	32	32
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 fourth quarter of the year 2021 was 362,693 whereas active subscribers were 90,126.

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

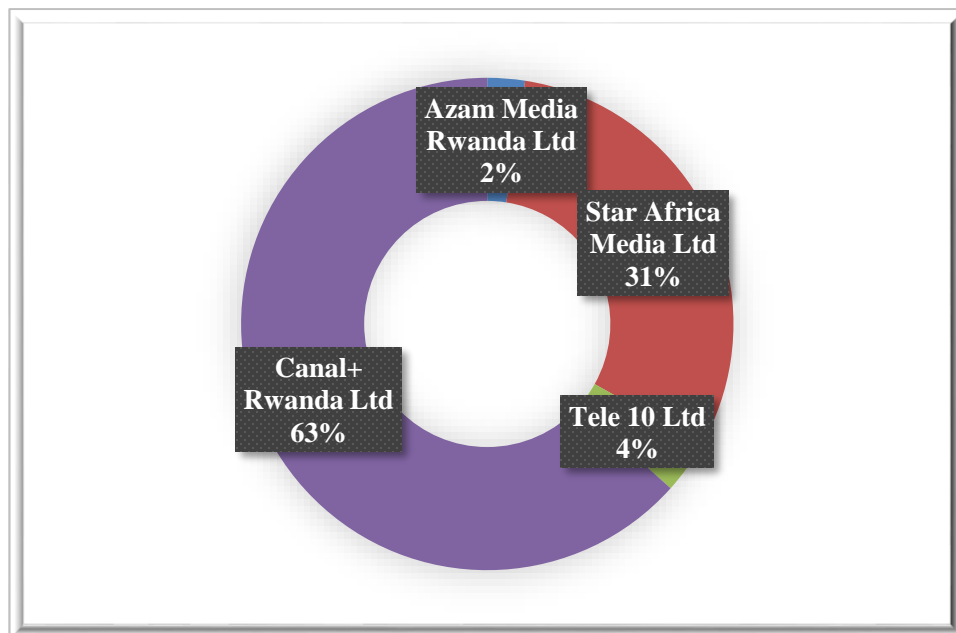
Name of Pay TV	Registered subscribers	Active <sup>6</sup> subscribers
Azam Media Rwanda Ltd	14,445	2,216
Star Africa Media Co., Ltd	246,419	27,634
Tele 10 Ltd	3,445	3,163
Canal+ Rwanda Ltd	98,384	57,113
<b>Total</b>	<b>362,693</b>	<b>90,126</b>

Source: Operators' reports

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

As of December 2021, the market shares for Canal+ Rwanda Ltd in active Pay TV subscriptions was 63%, 31% for Star Africa Media Co., Ltd, 4% for Tele 10 Ltd, and 2% for Azam Media Rwanda Ltd.

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



Source: Operators' reports

### 7.3. Decoders sold

During the fourth quarter of 2021, the number of decoders sold by Pay TV operators increased up to twenty-three thousand three hundred forty-nine (23,349) from thirteen thousand eight hundred thirty-nine (13,839) recorded in the previous quarter.

**Table 20: Trend of decoders sold from 4<sup>th</sup> quarter 2020 to 4<sup>th</sup> quarter of 2021**

Number of Decoders Sold	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021
Azam Media Rwanda Ltd	76	94	127	106	11
Star Africa Media Co., Ltd	3,687	4,219	6,231	5,141	5,419
Tele 10 Ltd	382	1,056	263	268	262
Canal+ Rwanda Ltd	5,304	11,617	12,423	8,324	17,657
<b>Total</b>	<b>9,449</b>	<b>16,986</b>	<b>19,044</b>	<b>13,839</b>	<b>23,349</b>

Source: Operators' reports

#### 7.4. Pay TV staff

The total number of staff employed by Pay TV operators as of December 2021 was 189 of which 58.7% are employed by Star Africa Media Co., Ltd, 29.6% by Canal+ Rwanda Ltd, 9.0% by Tele 10 Ltd, and 2.7% are employed by Azam Media Rwanda Ltd. The sixty-six (66) staff representing 34.9% of the total staff are female.

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

Operator	Staff per type of contract			Staff per gender		Domestic and foreign employees	
	Temporary	Permanent	Total	Female	Male	Domestic	Foreign
Azam Media Rwanda Ltd	0	5	5	2	3	4	1
Star Africa Media Co., Ltd	15	96	111	32	79	104	7
Tele 10 Ltd	0	17	17	7	10	17	0
Canal+ Rwanda Ltd	8	48	56	25	31	46	10
<b>Total</b>	<b>23</b>	<b>166</b>	<b>189</b>	<b>66</b>	<b>123</b>	<b>171</b>	<b>18</b>

Source: Operators' reports