



**STATISTICS REPORT FOR TELECOM, MEDIA  
AND BROADCASTING SECTOR AS OF THE  
SECOND 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 from 1<sup>st</sup> April to 30<sup>th</sup> June 2021.

**Table 1: Key ICT indicators**

INDICATORS	Q4 2020	Q1 2021	% change between Q2 and Q1
<b>SUBSCRIPTIONS</b>			
Mobile subscriptions	10,735,734	10,926,978	1.78
Fixed subscriptions	11,784	11,806	0.19
Mobile (SIM) penetration rate (%)	82.86	84.34	1.78
Fixed telephone penetration rate (%)	0.0910	0.0911	0.19
<b>VOICE TRAFFIC IN MINUTES</b>			
On-Net Voice Traffic	5,933,725,551	6,473,687,357	9.10
Outgoing Off-Net Voice Traffic	154,713,384	221,122,342	42.92
International Outgoing mobile voice traffic	10,682,708	25,590,640	139.55
International Incoming mobile voice traffic	15,878,105	16,834,853	6.03
<b>ROAMING SUBSCRIBERS</b>			
Roaming-in (Foreign subscribers)	1,111,967	1,083,362	-2.57
Roaming-Out (Own subscribers)	855,133	1,046,941	22.43
<b>ROAMING TRAFFIC</b>			
Total incoming minutes for roamers	44,115,468	46,628,292	5.70
Total outgoing minutes for roamers	1,908,917	2,067,579	8.31
<b>SMS TRAFFIC</b>			
On-net SMS	868,282,506	947,187,141	9.09
Outgoing Off-net SMS	3,615,366	5,807,145	60.62
Outgoing International SMS	997,842	495,219	-50.37
Incoming International SMS	356,211	487,846	36.95
<b>DATA/INTERNET</b>			
Internet subscriptions	8,240,259	8,061,373	-2.17
Internet subscriptions per 100 inhabitants	63.6	62.2	-2.17
Equipped international internet bandwidth (Mbps)	127,558	134,190	5.20
Used international internet bandwidth (Mbps)	58,094	64,134	10.40
<b>MEDIA AND BROADCASTING</b>			
Number of Television stations	18	19	5.56
Number of Radio FM stations	30	30	0.00
Active Pay TV subscribers	68,342	79,048	15.67
Registered Pay TV subscribers	344,018	361,396	5.05

Source: Operators' reports, June 2021

## 1. MOBILE TELEPHONE SERVICES

### 1.1. Mobile subscriptions

During the second 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 June 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	June 2021			March 2021			Quarterly Variation
	Postpaid	Prepaid	Total	Postpaid	Prepaid	Total	
MTN Rwanda Ltd	88,071	6,790,278	6,878,349	87,486	6,631,639	6,719,125	2.4%
Airtel Rwanda Ltd	4,870	4,043,759	4,048,629	4,865	4,011,744	4,016,609	0.8%
<b>Total</b>	<b>92,941</b>	<b>10,834,037</b>	<b>10,926,978</b>	<b>92,351</b>	<b>10,643,383</b>	<b>10,735,734</b>	<b>1.8%</b>

Source: Operators' reports, June 2021

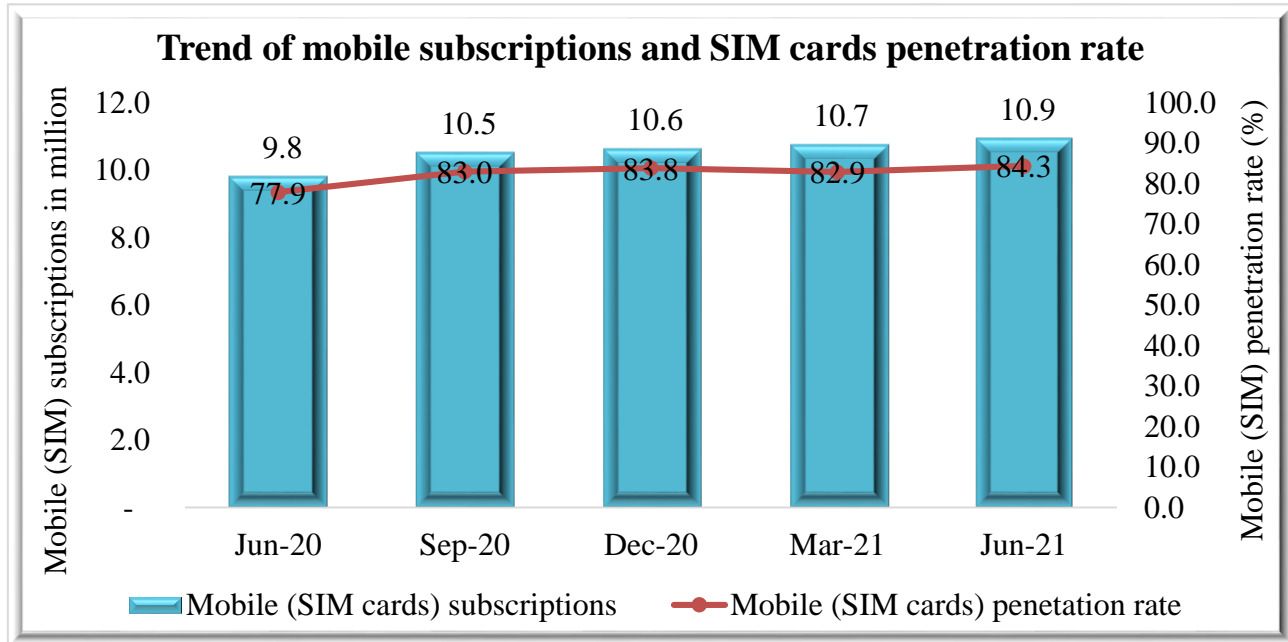
As of June 2021, the number of active mobile (SIM cards) subscriptions in the country increased to 10.9 million from 9.8 million reported at the end of June 2020. During this quarter under review, the active mobile-cellular telephone (SIM cards) subscriptions registered for every 100 people increased to 84.3% from 77.9% recorded at the end of June 2020.

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 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 Q2 2020 to Q2 2021**

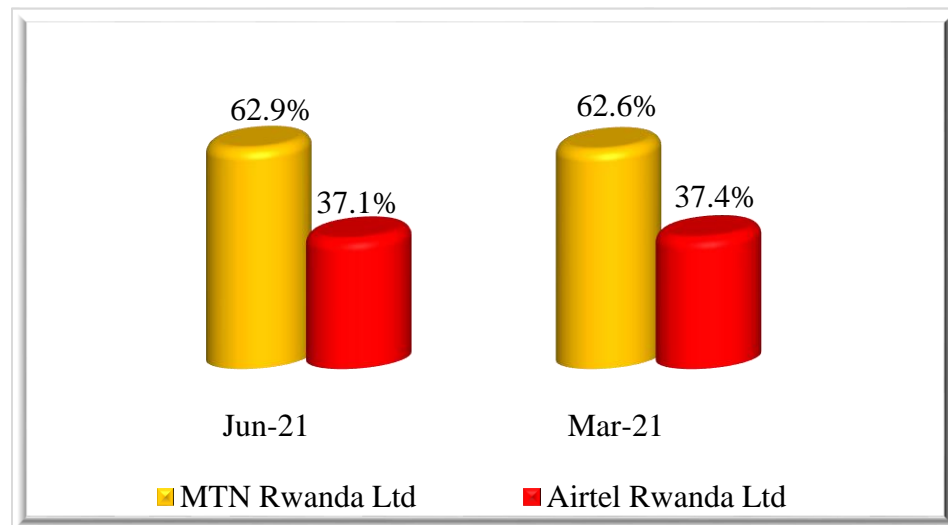


Source: Operators’ reports, June 2021

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

At the end of the second quarter of 2021, the active mobile subscriptions market shares for MTN Rwanda Ltd increased by 0.3 percentage points up to 62.9 percent, whereas that for Airtel Rwanda Ltd dropped by the same margin reaching 37.1 percent compared to the previous quarter.

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



Source: Operators’ reports, June 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.

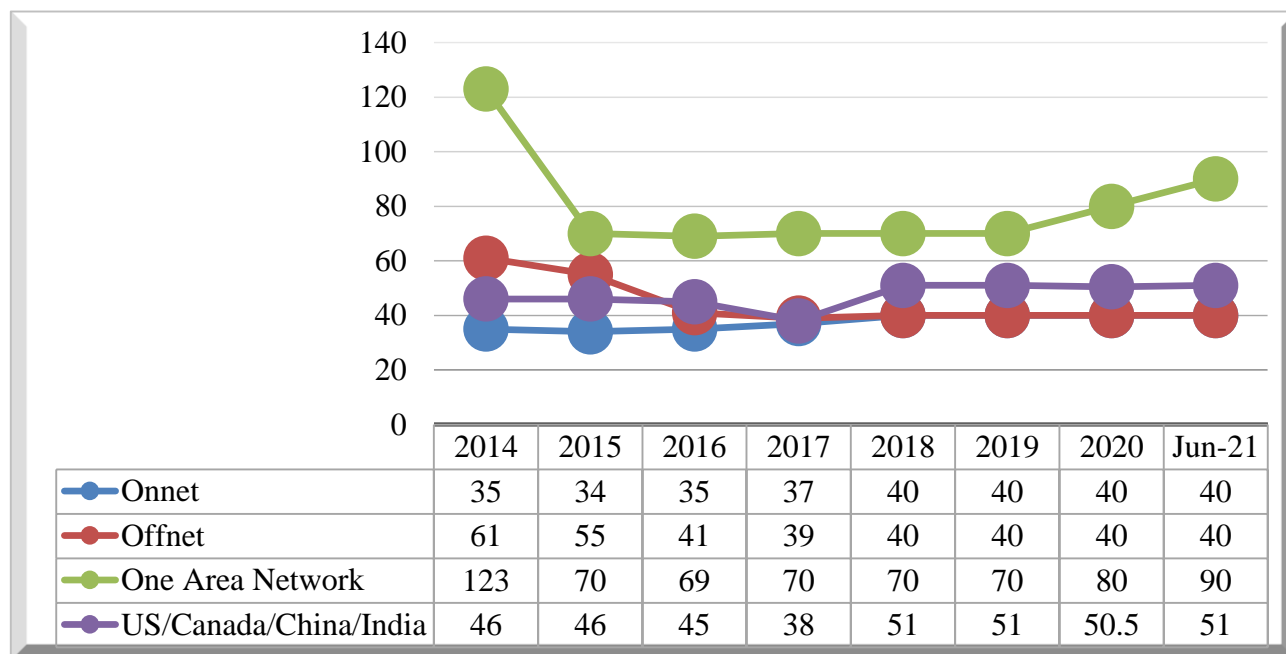
**Table 3: Mobile telephone voice tariff (in Frw) per minute per operator as of June 2021**

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, June 2021

During the quarter under review, 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 from 2014 to June 2021**



Source: Operators' reports, June 2021



As of the second 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 can send a short text message to its Africa sister companies ‘subscribers at 26 Frw.

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

#### 1.4. Mobile traffic statistics

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

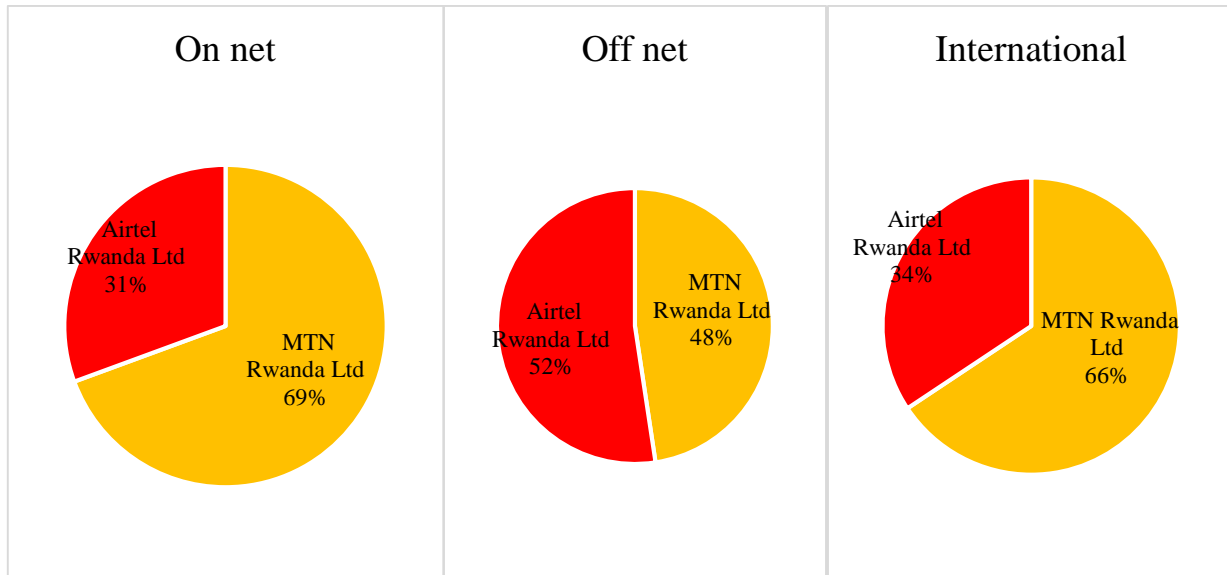
During the second quarter of the year 2021, the total volume of minutes originating within mobile networks was 6.4 billion minutes, the total minutes originating from one mobile networks to other networks was 220.7 million minutes, and the total minutes from mobile networks to international networks was 25.5 million minutes. The number of minutes from international networks to local mobile networks was 16.8 million minutes.

**Table 5: Outgoing and incoming traffic (in minutes) per operator as of the 2<sup>nd</sup> quarter 2021**

Voice traffic	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Outgoing calls			
On net	4,491,261,619	1,980,505,595	<b>6,471,767,214</b>
Off net	105,116,228	115,667,723	<b>220,783,951</b>
International	16,765,842	8,767,910	<b>25,533,752</b>
Incoming calls			
International	7,842,551	8,971,575	<b>16,814,126</b>

Source: Operators’ reports, June 2021

**Figure 4: Outgoing on net, off net and international voice traffic's market share as of the 2<sup>nd</sup> quarter 2021**



Source: Operators' reports, June 2021

During the second 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 4.2. Further, the average minutes per call from international networks to Rwanda mobile networks was 3.9.

**Table 6: Average minutes per call per operator in the 2<sup>nd</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	1.5	1.5	<b>1.5</b>
International	7.7	2.3	<b>4.2</b>
Incoming calls			
International	2.3	9.0	<b>3.9</b>

Source: Operators' reports, June 2021

### 1.4.2. Outgoing and incoming SMS traffic

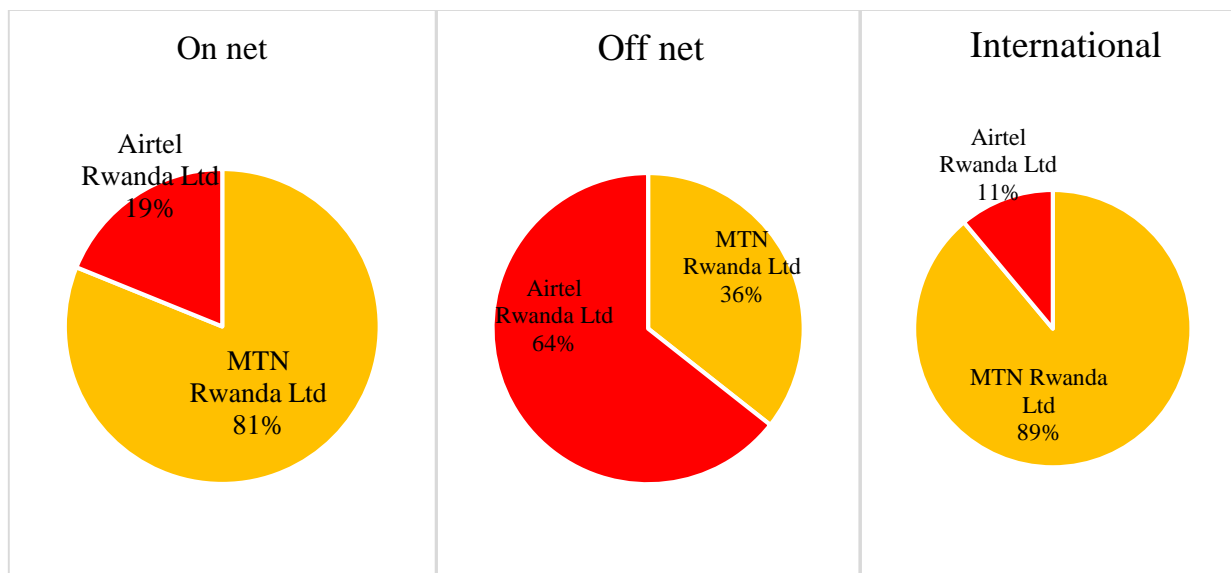
As of the second quarter of the year 2021, the total volume of SMS traffic originating within mobile networks was 947.1 million SMS, the total SMS traffic originating from mobile networks to other mobile networks was 5.8 million SMS and the total SMS traffic from mobile networks to international networks was 0.4 million SMS. The number of SMS from international networks to Rwanda was 0.4 million SMS.

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

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Outgoing SMS			
On net	768,551,741	178,635,400	<b>947,187,141</b>
Off net	2,068,590	3,738,555	<b>5,807,145</b>
International	440,340	54,879	<b>495,219</b>
Incoming SMS			
International	369,432	118,414	<b>487,846</b>

Source: Operators' reports, June 2021

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



Source: Operators' reports, June 2021

## 2. ROAMING

### 2.1. Roaming subscribers

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

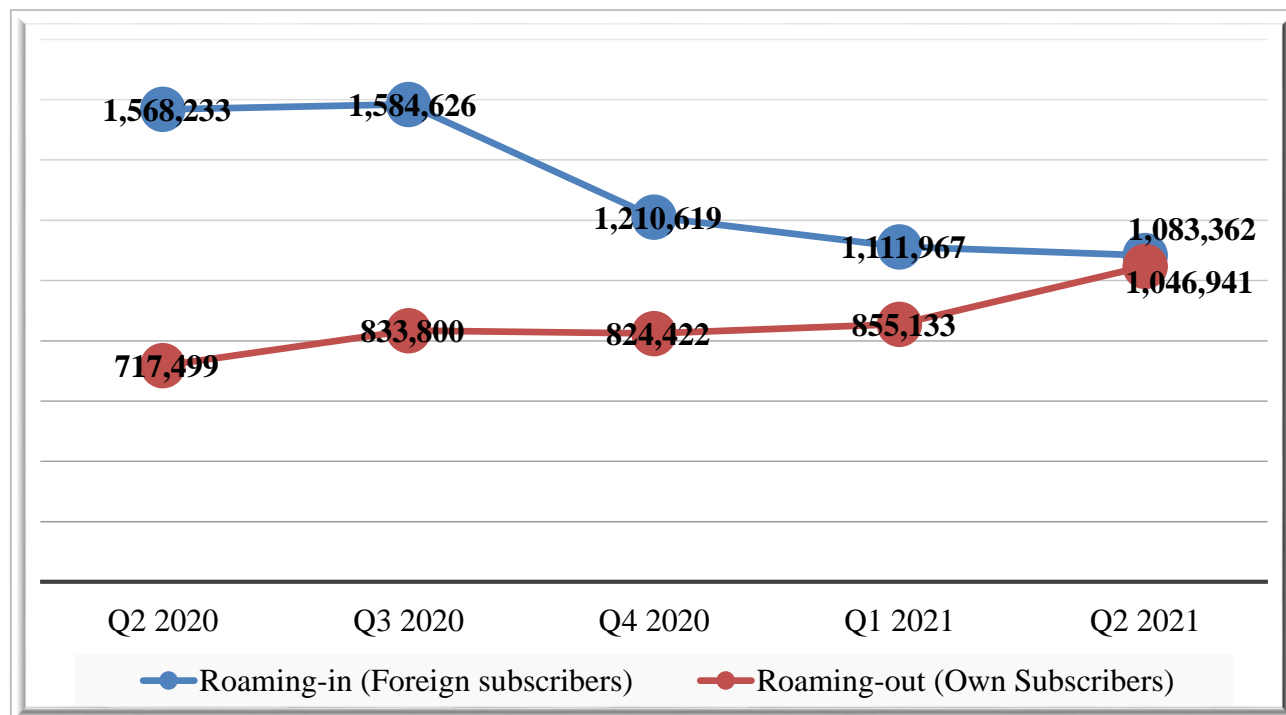
**Table 8: International roaming subscribers as of the second quarter 2021**

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Roaming-in (Foreign subscribers)	635,919	447,443	<b>1,083,362</b>
Roaming-out (Own Subscribers)	916,826	130,115	<b>1,046,941</b>

Source: Operators' reports, June 2021

During the second quarter 2021, the number of roamers-out increased to 1,046,941 from 855,133 subscribers representing an increase of 22.4% and the number of roamers-in decreased to 1,083,362 from 1,111,967 subscribers recorded during the previous quarter, which is equivalent to 2.6 percent.

**Figure 6: Trend of roaming subscribers from Q2 2020 to Q2 2021**



Source: Operators' reports, June 2021

## 2.2. Roaming traffic

During the quarter under review, the total volume of outgoing traffic generated by foreign subscribers roaming in Rwanda was 1.1 million minutes whereas the total minutes generated by Rwanda mobile networks' subscribers roamed outside the country was 0.9 million minutes. On the other hand, the total incoming traffic on foreign subscribers roamed in Rwanda was 31.1 million minutes and the incoming minutes to Rwanda subscribers roamed on foreign networks was 15.5 million.

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

Destination	Foreign subscribers roaming on local networks			Own subscribers roaming on foreign networks		
	MTN	Airtel	Total	MTN	Airtel	Total
Incoming	19,035,706	12,081,142	31,116,848	14,274,307	1,237,137	15,511,444
Outgoing	758,407	362,001	1,120,408	913,512	33,659	947,171
<b>Total</b>	<b>19,794,113</b>	<b>12,443,143</b>	<b>32,237,256</b>	<b>15,187,819</b>	<b>1,270,796</b>	<b>16,458,615</b>

Source: Operators' reports, June 2021

## 3. FIXED TELEPHONE SERVICES

### 3.1. Fixed telephone subscriptions

As of the second 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 June 2021**

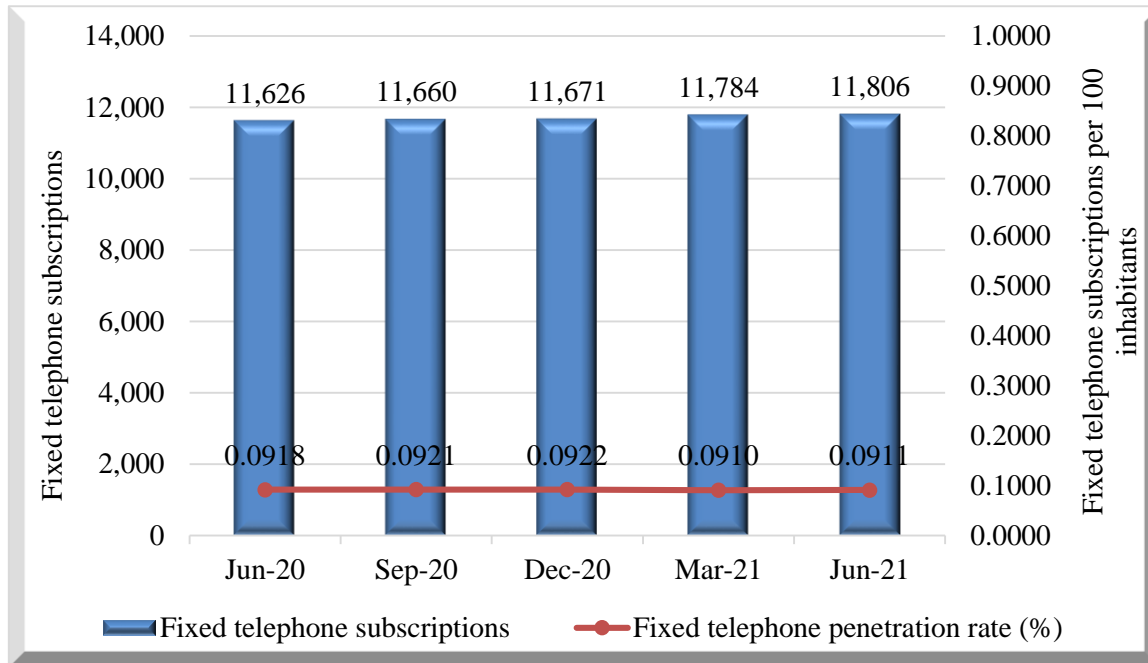
Name of Operator	Fixed telephone subscriptions	Fixed telephone penetration rate (%) <sup>3</sup>
MTN Rwanda Ltd	172	<b>0.0911</b>
Airtel Rwanda Ltd	9,521	
Liquid Telecom Ltd	852	
BSC Ltd	1,261	
<b>Total</b>	<b>11,806</b>	

Source: Operators' reports, June 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 June 2021, the number of fixed telephone subscriptions increased up to 11,806 from 11,626 recorded as of the second quarter of 2020. The fixed telephone subscriptions per 100 people decreased to 0.0911 percent from 0.0918 percent.

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

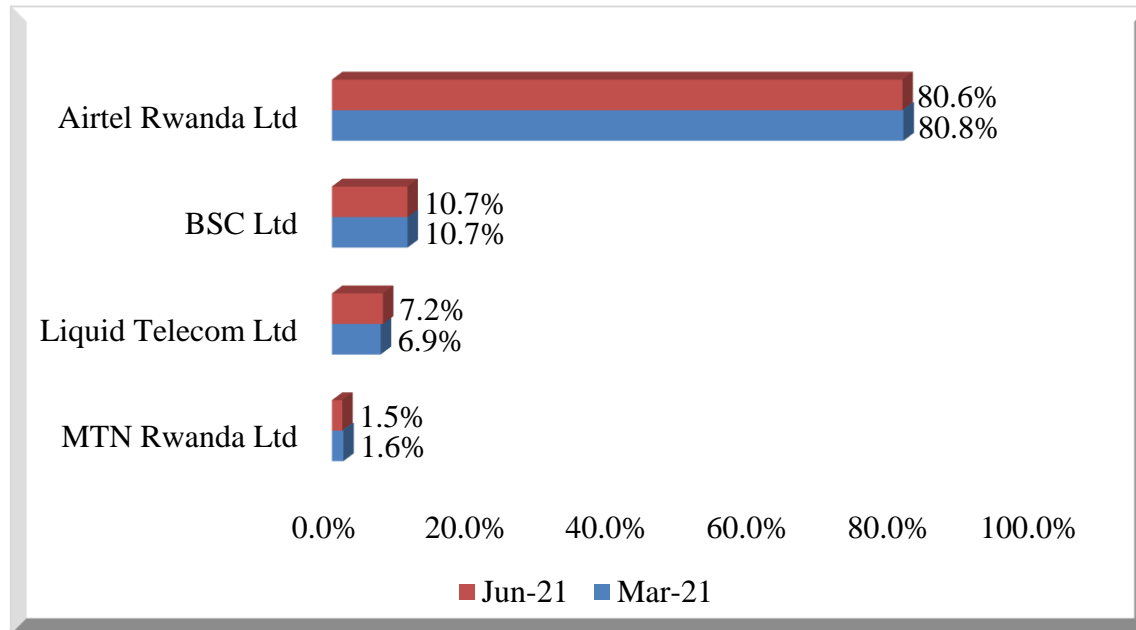


**Source: Operators' reports, June 2021**

As of June 2021, the market shares in fixed telephone subscriptions for Airtel Rwanda Ltd decreased by 0.2 percentage points up to 80.6 percent, and that for Liquid Telecom Ltd increased by 0.3 percentage points up to 7.2 per cent. The market shares for MTN Rwanda Ltd decreased by 0.1 percentage points to 1.5 percent whereas that for BSC Ltd remained constant at 10.7 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 June-2021**



Source: Operators' reports, June 2021

### 3.2. Fixed telephone traffic

During this quarter under review, the total volume of minutes originating within operators by fixed telephone lines was 1.9 million minutes, the total minutes originating from one operator to other operators was 0.3 million minutes, and the total minutes from Rwanda fixed telephone lines to international networks was 0.05 million minutes. The number of minutes from international networks to local fixed telephone lines was 20,727 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	1,701,826	214,327	3,990	<b>1,920,143</b>
Off net	89,974	3,583	244,834	<b>338,391</b>
International	29,728	3,616	23,544	<b>56,888</b>
<b>Incoming calls</b>				
International	20,491	-	236	<b>20,727</b>

Source: Operators' reports, June 2021

### 3.3. Fixed telephone service tariff

During the second 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 June 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, June 2021**



## 4. INTERNET SERVICE PROVISION

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

At the end of June 2021, there were 8,037,279 active SIM cards subscribed to the internet and 24,094 active fixed internet subscriptions. The table below shows the internet subscriptions per operator.

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

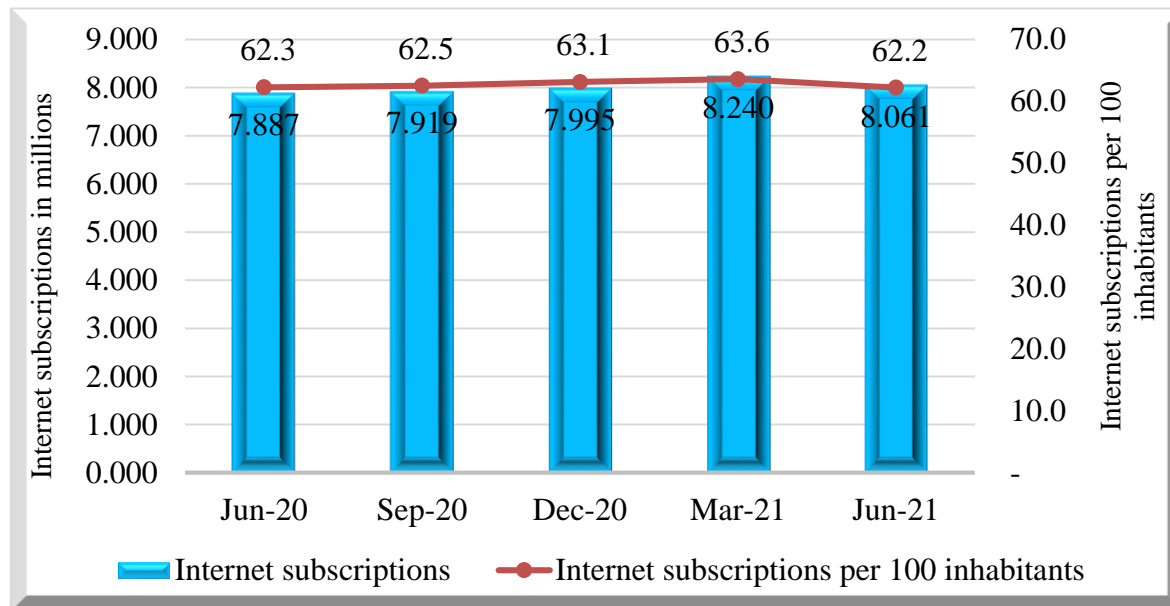
Name of operators	Fixed internet subscriptions		Mobile internet subscriptions			Total internet subscriptions
	Narrowband (≤256kbps)	Broadband (≥256kbps)	GPRS&EDGE	3G	4G	
MTN Rwanda Ltd	87	3,051	3,895,429	1,354,764	27,913	5,281,244
Airtel Rwanda Ltd		1,620	1,911,953	751,451	4,020	2,669,044
Axiom Networks Ltd		148				148
4NET AFRICA Ltd		1				1
BSC LTD		3,039			13,262	16,301
Liquid Telecom Ltd		8,404				8,404
CBNET Ltd		5			765	770
G-MAX Ltd		12			708	720
ISCO ISP Ltd		21			892	913
Net Link Ltd		1			620	621
Piramie INC		1			578	579
Simba Supermarket					177	177
Truconnect		29			1,153	1,182
BK Techouse		129			1,213	1,342
FASTNET		12			4,288	4,300
Mango Telecom Ltd		8			59,570	59,578
POPCONN Ltd		12			3,294	3,306
RTN Ltd					1,917	1,917
AC Group Ltd					340	340
Smart Broadband Ltd					365	365
TNSP		23			1,950	1,973
NETPRO Ltd					657	657
GVA Rwanda		7,491				7,491
<b>Total</b>	<b>87</b>	<b>24,007</b>	<b>5,807,382</b>	<b>2,106,215</b>	<b>123,682</b>	<b>8,061,373</b>
<b>Penetration rate (%)</b>	<b>0.0</b>	<b>0.2</b>	<b>44.8</b>	<b>16.3</b>	<b>1.0</b>	<b>62.2</b>

Source: Operators' reports, June 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 June 2021, the total number of internet subscriptions increased by 2.2 per cent up to 8.061 million from 7.887 million recorded at the end of the second quarter of the year 2020 whereas there was a decrease of 2.2 percent compared to March 2021. At the end of June 2021, the internet subscriptions per 100 people decreased by 1.4 percentage points up to 62.2% compared to the first quarter of 2021.

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



Source: Operators’ reports, June 2021

At the end of June 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**

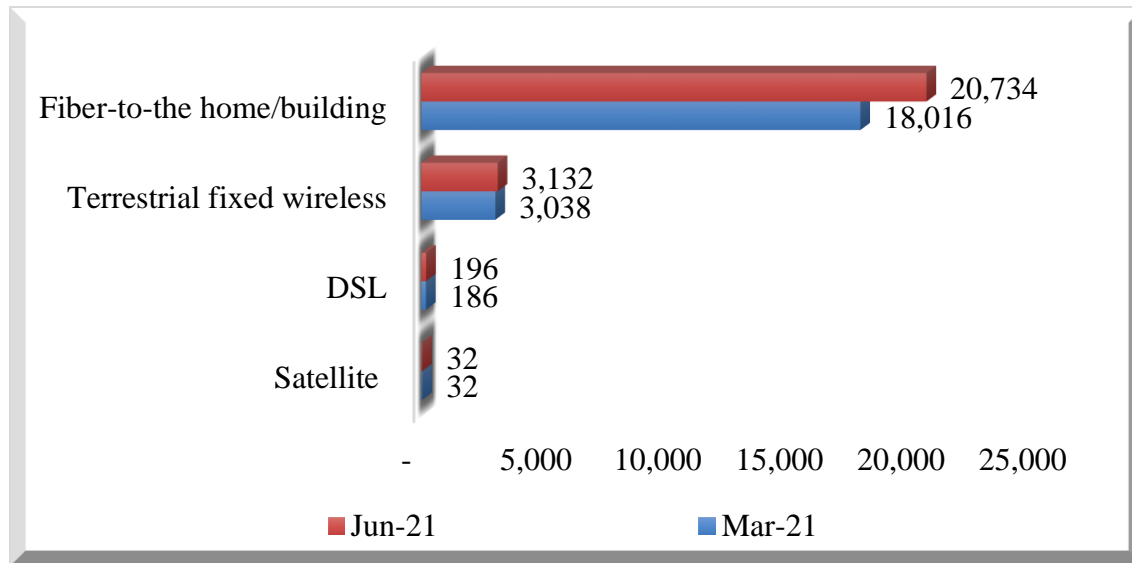
Speed	Fixed internet subscriptions	
	June 2021	March 2021
< 256 kbps	87	87
[256 kbps-2Mbps [	1,769	1,747
[2 Mbps -10 Mbps [	3,884	3,690
[10 Mbps-30Mbps [	13,156	11,625
[30 Mbps < 100Mbps [	5,018	3,964
≥ 100 Mbps	180	159
<b>Total</b>	<b>24,094</b>	<b>21,272</b>

Source: Operators’ reports, June 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**

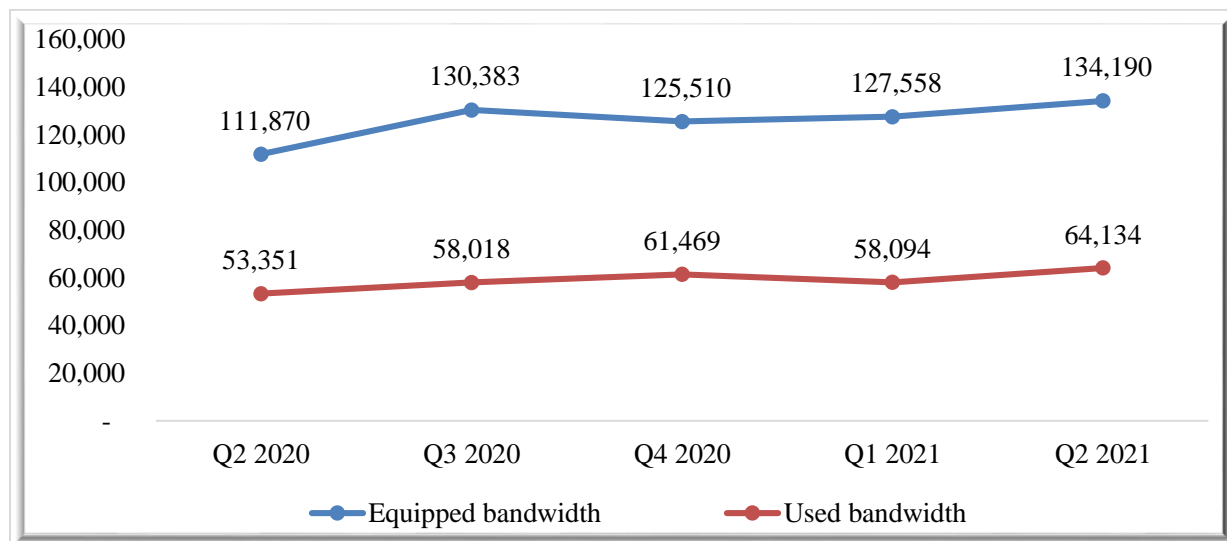


Source: Operators' reports, June 2021

#### 4.2. International internet bandwidth

During the quarter under reporting, the total equipped international internet bandwidth available in the country was 134,190 Mbps whereas the average used internet bandwidth was 64,134 Mbps.

**Figure 11: Trend of international internet bandwidth (Mbps) from Q2 2020 to Q2 2021**

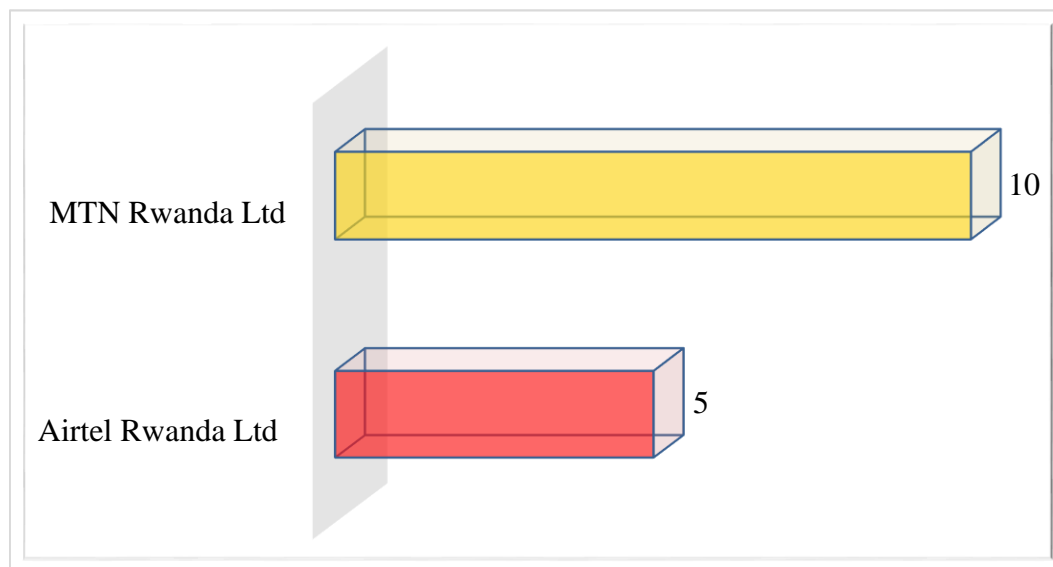


Source: Operators' reports, June 2021

### 4.3. Mobile internet tariff

As of June 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 June 2021**



Source: Operators' reports, June 2021

## 5. TELECOMMUNICATION REVENUES AND INVESTMENT

**Table 15: Trend of quarterly revenues (Frw) from Q3 2020 to Q2 2021**

Category	Q3 2020	Q4 2020	Q1 2021	Q2 2021
Total Revenues for MNOs and Liquid Telecom Ltd	55,865,808,070	53,148,500,338	53,716,648,207	58,950,402,035
Total revenues for ISPs and Wholesale Network Service Provider	9,708,752,820	9,347,116,675	11,764,554,517	11,982,790,758
<b>Total</b>	<b>65,574,560,889</b>	<b>62,495,617,014</b>	<b>65,481,202,724</b>	<b>70,933,192,793</b>

Source: Operators' reports, June 2021

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

Category	Q3 2020	Q4 2020	Q1 2021	Q2 2021
Total investment for MNOs and Liquid Telecom Ltd	9,031,508,211	3,872,841,903	13,276,175,615	12,139,912,422
Total investment for ISPs and Wholesale Network Service Provider	2,157,953,517	770,344,137	790,609,760	370,652,560
<b>Total</b>	<b>11,189,461,727</b>	<b>4,643,186,039</b>	<b>14,066,785,375</b>	<b>12,510,564,982</b>

Source: Operators' reports, June 2021

## 6. EMPLOYMENT IN TELECOMMUNICATION SECTOR

One thousand one hundred and thirty-two (1,132) persons were employed in telecommunication sector at the end of June 2021; nine hundred ninety-nine (999) are permanent staff whereas one hundred thirty-three (133) are temporary staff. There were also seven hundred and fifty (750) outsourced staff employed by telecommunication sector. The table below illustrates the number of employed persons by operator.

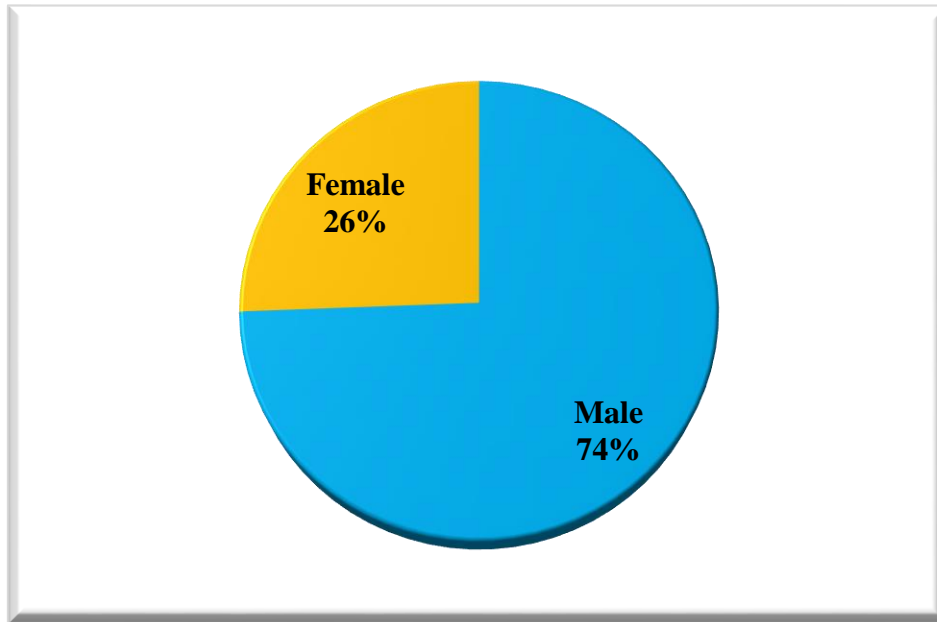
**Table 17: Number of staff employed in telecommunication sectors as of June 2021**

Operator	Type of contract			Gender		Domestic and foreign employees		Outsourced staff
	Temporary	Permanent	Total	Female	Male	Domestic	Foreign	
MTN Rwanda Ltd	8	290	298	91	207	290	8	412
Airtel Rwanda Ltd	0	128	128	16	112	123	5	252
Liquid Telecom Ltd	77	62	139	27	112	135	4	0
G-MAX	0	9	9	3	6	9	0	0
Truconnect	3	5	8	3	5	8	0	1
Axiom Networks Ltd	0	24	24	7	17	22	2	0
4NetAfrica Ltd	0	1	1	0	1	1	0	0
TNSP	22	8	30	6	24	30	0	2
KTRN Ltd	0	116	116	27	89	113	3	0
Piramie INC	0	6	6	4	2	4	2	2
POPCONN Ltd	0	14	14	4	10	13	1	0
BSC Ltd	11	66	77	18	59	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	4	5	3	2	5	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	126	126	54	72	124	2	0
NET LINK LTD	0	10	10	3	7	10	0	0
CBNET Ltd	2	1	3	1	2	3	0	0
RTN	0	22	22	6	16	22	0	0
Smart Broadband Ltd	0	4	4	0	4	4	0	5
NETPRO LTD	0	5	5	3	2	5	0	0
GVA Rwanda	0	33	33	6	27	32	1	74
<b>Total</b>	<b>133</b>	<b>999</b>	<b>1,132</b>	<b>299</b>	<b>833</b>	<b>1104</b>	<b>28</b>	<b>750</b>

Source: Operators' reports, June 2021

The two hundred ninety-nine (299) staff representing 26 percent of the total staff are female whereas 74 percent are male as shown in the figure below. The three hundred thirty-seven persons (337) representing 81.6 per cent of the total outsourced staff are female.

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



**Source: Operators' reports, June 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 June 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, nineteen (19) television stations, twenty-three (23) online media houses, thirty-two (32) print media houses, and three (3) international media houses.

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

Category	Jun-2020	Sep-2020	Dec-2020	Mar-2021	June-2021
Signal distributors	2	2	1	1	1
Pay TV operators	3	3	4	4	4
FM Radio stations	34	35	29	30	30
Television stations	19	19	19	18	19
Online media houses	23	23	23	23	23
Print media houses	31	31	31	31	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 second quarter of the year 2021 was 361,396 whereas active subscribers were 79,048.

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

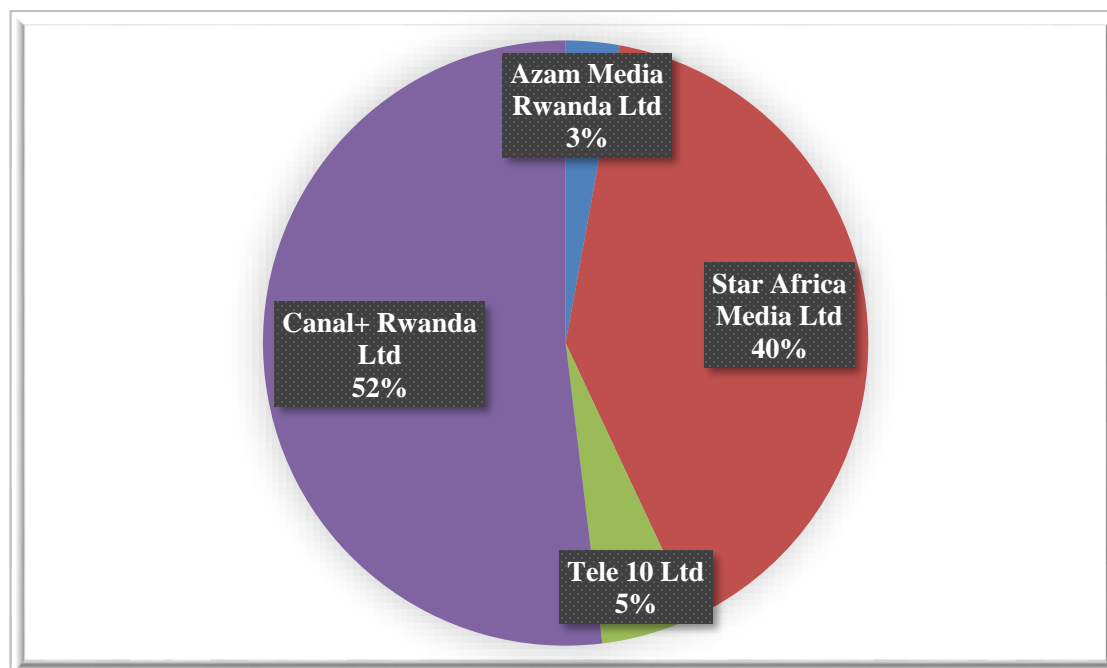
Name of Pay TV	Registered subscribers	Active <sup>6</sup> subscribers
Azam Media Rwanda Ltd	14,313	2,264
Star Africa Media Co., Ltd	273,482	31,741
Tele 10 Ltd	4,235	3,987
Canal+ Rwanda Ltd	69,366	41,056
<b>Total</b>	<b>361,396</b>	<b>79,048</b>

Source: Operators' reports, June 2021

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

As of June 2021, the market shares for Canal+ Rwanda Ltd in active Pay TV subscriptions was 52%, 40% for Star Africa Media Co., Ltd, 5% for Tele 10 Ltd, and 3% for Azam Media Rwanda Ltd.

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



Source: Operators' reports, June 2021

### 7.3. Decoders sold

During the second quarter of 2021, the number of decoders sold by Pay TV operators increased to nineteen thousand forty-four (19,044) from sixteen thousand nine hundred and eighty-six (16,986) recorded in the previous quarter.

**Table 20: Trend of decoders sold from 2<sup>nd</sup> quarter 2020 to 2<sup>nd</sup> quarter of 2021**

Number of Decoders Sold	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021
Azam Media Rwanda Ltd	98	110	76	94	127
Star Africa Media Co., Ltd	3,193	4,983	3,687	4,219	6,231
Tele 10 Ltd	444	269	382	1,056	263
Canal+ Rwanda Ltd	-	-	5,304	11,617	12,423
<b>Total</b>	<b>3,735</b>	<b>5,362</b>	<b>9,449</b>	<b>16,986</b>	<b>19,044</b>

Source: Operators' reports, June 2021



#### 7.4. Pay TV staff

The total number of staff employed by Pay TV operators as of June 2021 was 211 of which 65.9% are employed by Star Africa Media Co., Ltd, 23.2% by Canal+ Rwanda Ltd, 8.1% by Tele 10 Ltd, and 2.8% are employed by Azam Media Rwanda Ltd. The sixty-nine (69) staff representing 32.7% of the total staff are female.

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

Operator	Staff per type of contract			Staff per gender		Origin	
	Temporary	Permanent	Total	Female	Male	Domestic	Foreign
Azam Media Rwanda Ltd	0	6	6	2	4	5	1
Star Africa Media Co., Ltd	18	121	139	37	102	131	8
Tele 10 Ltd	0	17	17	7	10	17	0
Canal+ Rwanda Ltd	4	45	49	23	26	39	10
<b>Total</b>	<b>22</b>	<b>189</b>	<b>211</b>	<b>69</b>	<b>142</b>	<b>192</b>	<b>19</b>

Source: Operators' reports, June 2021