



**STATISTICS REPORT FOR TELECOM, MEDIA  
AND BROADCASTING SECTOR AS OF THE  
SECOND QUARTER OF THE YEAR 2020**

**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 .....	iii
REPORT SUMMARY .....	iv
1. MOBILE TELEPHONE SERVICES .....	1
1.1. Mobile subscriptions .....	1
1.2. Market share for mobile (SIM cards) Subscriptions .....	2
1.3. Mobile Voice, and SMS tariff structure .....	3
1.4. Mobile traffic statistics .....	4
1.4.1. Mobile outgoing and incoming voice traffic .....	4
1.4.2. Outgoing and incoming SMS traffic .....	6
2. ROAMING .....	7
2.1. Roaming subscribers .....	7
2.2. Roaming traffic .....	8
3. FIXED TELEPHONE SERVICES .....	9
3.1. Fixed telephone subscriptions .....	9
3.2. Fixed telephone traffic .....	10
3.3. Fixed telephone service tariff .....	11
4. INTERNET SERVICE PROVISION .....	12
4.1. Internet subscriptions .....	12
4.2. International internet bandwidth .....	14
4.3. Mobile internet tariff .....	15
5. TELECOMMUNICATION REVENUES AND INVESTMENT .....	16
6. EMPLOYMENT IN TELECOMMUNICATION SECTOR .....	17
7. MEDIA AND BROADCASTING .....	19
7.1. Licensed media operators .....	19
7.2. Pay TV subscriptions .....	19
7.3. Decoders sold .....	20
7.4. Pay TV staff .....	20

## LIST OF TABLES

Table 1: Key ICT indicators .....	iv
Table 2: Comparison of active mobile subscriptions per operator by contract type.....	1
Table 3: Mobile telephone voice tariff (in Frw) per minute per operator as of June 2020 .....	3
Table 4: SMS tariff structure (in Frw) as of June 2020 .....	4
Table 5: Outgoing and incoming traffic (in minutes) per operator as of the 2 <sup>nd</sup> quarter 2020.....	4
Table 6: Average minutes per call per operator in the 2 <sup>nd</sup> quarter 2020.....	5
Table 7: SMS traffic (in numbers) as of the second quarter 2020 .....	6
Table 8: International roaming subscribers as of the second quarter 2020 .....	7
Table 9: Outgoing and incoming roaming traffic (in minutes) per operator as of the second quarter 2020.....	8
Table 10: Fixed telephone subscriptions as of June 2020 .....	9
Table 11: Outgoing mobile and fixed telephone incoming traffic .....	11
Table 12: Fixed telephone service tariff structure (in Frw) per minute as of June 2020 .....	11
Table 13: Internet subscriptions per category as of June 2020 .....	12
Table 14: Fixed internet subscriptions by speed .....	13
Table 15: Fixed internet subscriptions by technology .....	14
Table 16: International internet bandwidth (Mbps) per operator as of the second quarter 2020 .....	14
Table 17: Trend of quarterly revenues (Frw) from Q3 2019 to Q2 2020 .....	16
Table 18: Trend of additional investment (Frw) made in the second quarter 2020 .....	16
Table 19: Number of staff employed in telecommunication sectors as of June 2020 .....	17
Table 20: Trends of Licensed media operators from June 2019 to June 2020 .....	19
Table 21: Number of Pay TV subscribers as of June 2020 .....	19
Table 22: Trend of decoders sold from 2 <sup>nd</sup> quarter 2019 to 2 <sup>nd</sup> quarter of 2020.....	20
Table 23: Number of staff employed in Pay TV operators as of June 2020 .....	20

## LIST OF FIGURES

Figure 1: Trend of mobile subscriptions and penetration rate from Q2 2019 to Q2 2020 .....	1
Figure 2: Market share trends for mobile (SIM cards) subscriptions per operator .....	2
Figure 3: Trend of average mobile voice tariff (in Frw) per minute from 2014 to June 2020 .....	3
Figure 4: Outgoing on net, off net and international voice traffic market share as of the 2 <sup>nd</sup> quarter 2020.....	5
Figure 5: Outgoing on net, off net and international SMS traffic market share as of the second quarter 2020.....	6
Figure 6: Trend of roaming subscribers from Q2 2019 to Q2 2020 .....	7
Figure 7: Trend of fixed telephone subscriptions and penetration rate .....	9
Figure 8: Market share trends for fixed telephone subscriptions per operator as of June 2020.....	10
Figure 9: Trend of internet subscriptions and internet subscriptions per 100 inhabitants .....	13
Figure 10: Trend of equipped international internet bandwidth (Mbps) from Q2 2019 to Q2 2020 .....	14
Figure 11: Standard mobile internet tariff (Frw/MB) as of the second quarter 2020 .....	15
Figure 12: Telecom staff by gender as of June 2020 .....	18

## REPORT SUMMARY

This report compiles the information from telecom operators, 4G wholesaler, Internet Service Providers (ISPs), and Pay TV operators as per their license obligations for the period from 1<sup>st</sup> April to 30<sup>th</sup> June 2020.

**Table 1: Key ICT indicators**

INDICATORS	Q1 2020	Q2 2020	% change between Q2 and Q1
<b>SUBSCRIPTIONS</b>			
Mobile subscriptions	9,862,992	9,860,169	-0.03
Fixed subscriptions	11,780	11,626	-1.3
Mobile (SIM) penetration rate (%)	77.89	77.87	-0.03
Fixed telephone penetration rate (%)	0.093	0.092	-1.3
<b>VOICE TRAFFIC IN MINUTES</b>			
On-Net Voice Traffic	5,141,718,437	5,823,650,017	13.3
Outgoing Off-Net Voice Traffic	59,237,692	62,856,356	6.1
International Outgoing mobile voice traffic	14,231,654	11,763,561	-17.3
International Incoming mobile voice traffic	15,111,314	15,346,164	1.6
<b>ROAMING SUBSCRIBERS</b>			
Roaming-in (Foreign subscribers)	1,770,879	1,568,233	-11.4
Roaming-Out (Own subscribers)	947,450	717,499	-24.3
<b>ROAMING TRAFFIC</b>			
Total incoming minutes for roamers	50,579,025	48,746,355	-3.6
Total outgoing minutes for roamers	3,087,250	1,807,162	-41.5
<b>SMS TRAFFIC</b>			
On-net SMS	725,082,997	925,664,140	27.7
Outgoing Off-net SMS	5,950,749	7,244,261	21.7
Outgoing International SMS	409,312	383,000	-6.4
Incoming International SMS	715,736	652,334	-8.9
<b>DATA/INTERNET</b>			
Internet subscriptions	7,960,018	7,886,771	-0.9
Internet subscriptions per 100 inhabitants	62.9	62.3	-0.9
Equipped international internet bandwidth (Mbps)	95,843	111,870	16.7
<b>BROADCASTING</b>			
Number of Television stations	18	19	5.6
Number of Radio FM stations	34	34	0.0
Active Pay TV subscribers	61,921	59,694	-3.6
Registered Pay TV subscribers	268,300	302,902	12.9

Source: Operators' reports, June 2020

## 1. MOBILE TELEPHONE SERVICES

### 1.1. Mobile subscriptions

As of June 2020, 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 2020 were 9.8 million SIM cards.

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

Name of operator	June 2020			March 2020			Quarterly Variation
	Postpaid	Prepaid	Total	Postpaid	Prepaid	Total	
MTN Rwanda Ltd	63,206	5,831,137	5,894,343	53,048	5,406,973	5,460,021	7.95%
Airtel Rwanda Ltd	2,814	3,963,012	3,965,826	3,151	4,399,820	4,402,971	-8.01%
Total	66,020	9,794,149	9,860,169	56,199	9,806,793	9,862,992	-0.05%

**Source: Operators' reports, June 2020**

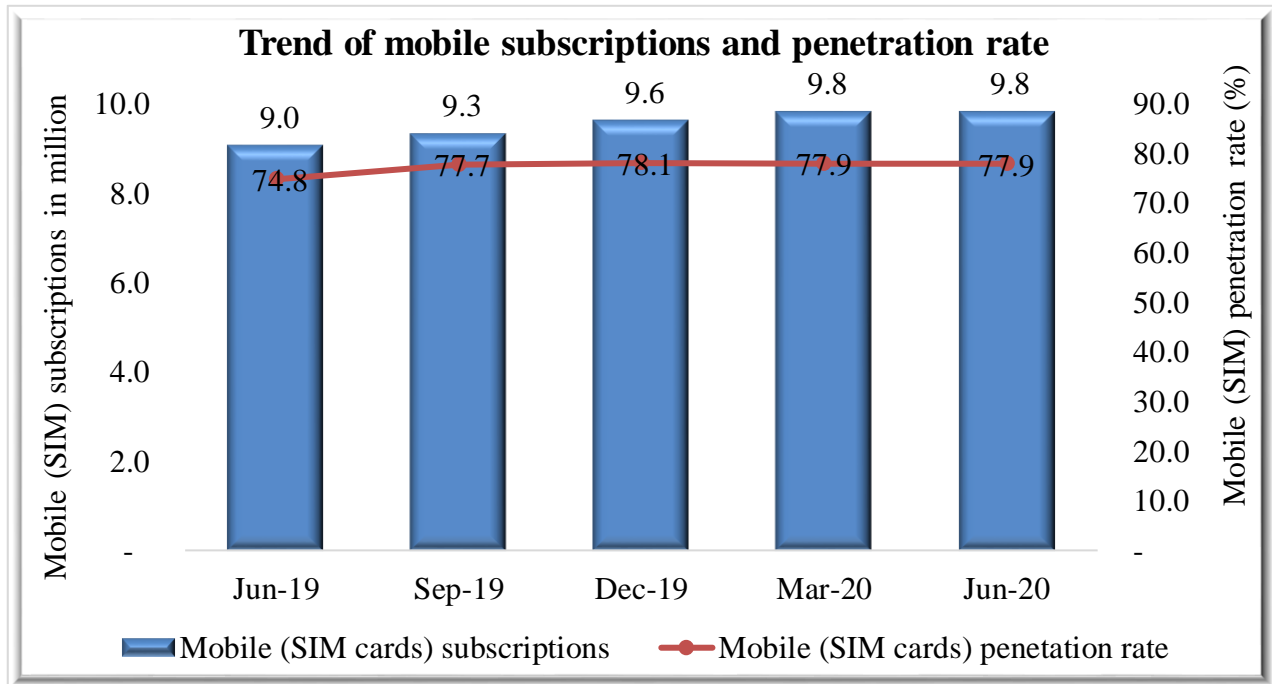
**Figure 1: Trend of mobile subscriptions and penetration rate<sup>2</sup> from Q2 2019 to Q2 2020**

As of June 2020, the number of active mobile (SIM cards) subscriptions in the country increased up to 9.8 million from 9.0 million reported at the end of June 2019. During this period under review, the active mobile-cellular telephone (SIM cards) subscriptions registered for every 100 people increased to 77.9 from 74.8 recorded at the end of second quarter of 2019.

---

<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.

<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.

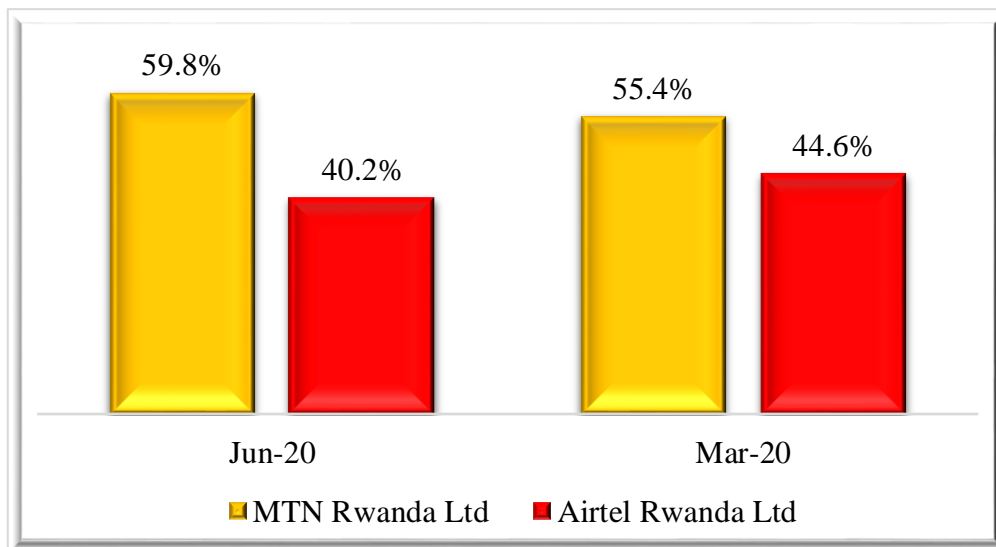


Source: Operators’ reports, June 2020

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

During the period under review, the mobile subscriptions market shares for MTN Rwanda Ltd increased by 4.4 percentage points up to 59.8 per cent, whereas that for Airtel Rwanda Ltd declined by the same margin reaching 40.2 per cent.

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



Source: Operators’ reports, June 2020

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

During the period under review, the average tariff for calling by mobile phone within a telecom operator was 40 Frw while also 40 Frw was between telecom operators, 70 Frw for One Area Network, and 50.5 Frw to call in US, Canada, China, and India.

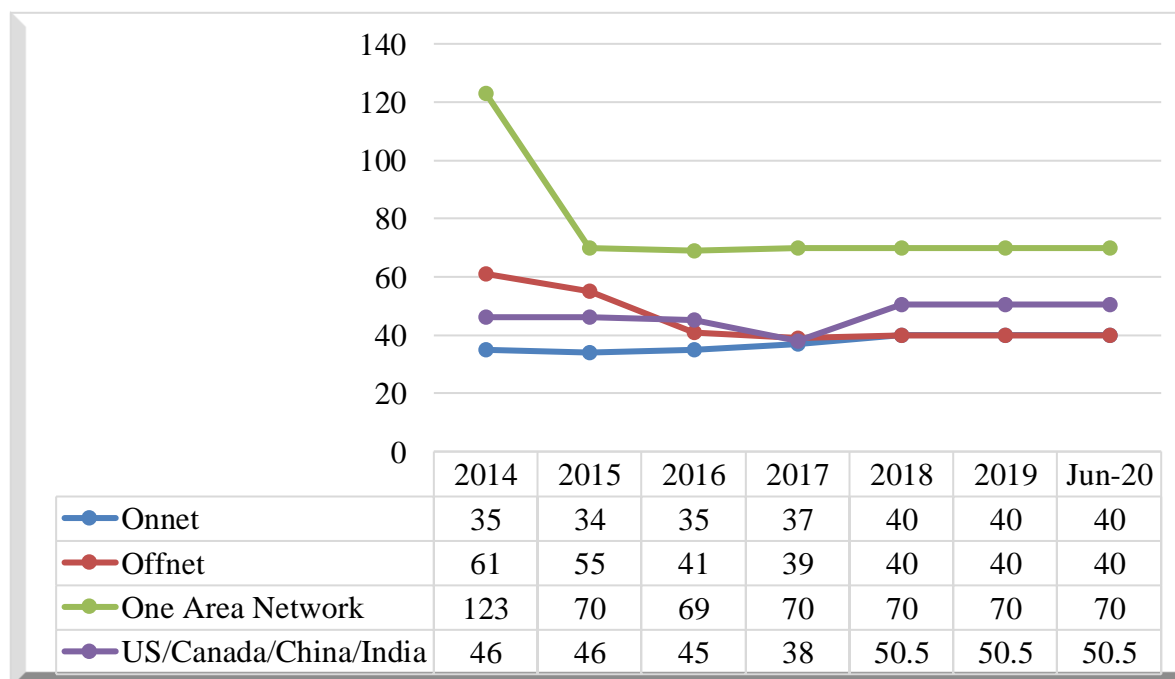
**Table 3: Mobile telephone voice tariff (in Frw) per minute per operator as of June 2020**

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Average
Onnet	45	35	40.0
Offnet	45	35	40.0
One Area Network	70	70	70.0
US/Canada/China/India	51	50	50.5

Source: Operators' reports, June 2020

**Figure 3: Trend of average mobile voice tariff (in Frw) per minute from 2014 to June 2020**

The standard voice tariff for mobile networks remained unchanged since the last two years whereby the average tariff for calling by mobile telephone within a telecom operator was 40 Frw, 40 Frw between telecom operators, 70 Frw to call in One Area Network Countries, and 50.5 Frw to call in US, Canada, China, and India.



Source: Operators' reports, June 2020



**Table 4: SMS tariff structure (in Frw) as of June 2020**

During this period under review, the average tariff for sending a message by mobile phone within a telecom operator was 13.5 Frw, whereas 20.5 Frw was between telecom operators, 35.5 Frw to Uganda and Kenya, 45.0 Frw to South Sudan, and 79.5 Frw to other international countries. A subscriber on Airtel Rwanda's network can also send a short messaging text to India, Gabon, Nigeria, Tanzania, Ghana, Niger, and Malawi on 26 Frw.

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Average
Onnet	12	15	13.5
Offnet	26	15	20.5
Uganda and Kenya	45	26	35.5
South Sudan	45	45	45.0
International	80	79	79.5

**Source: Operators' reports, June 2020**

## 1.4. Mobile traffic statistics

### 1.4.1. Mobile outgoing and incoming voice traffic

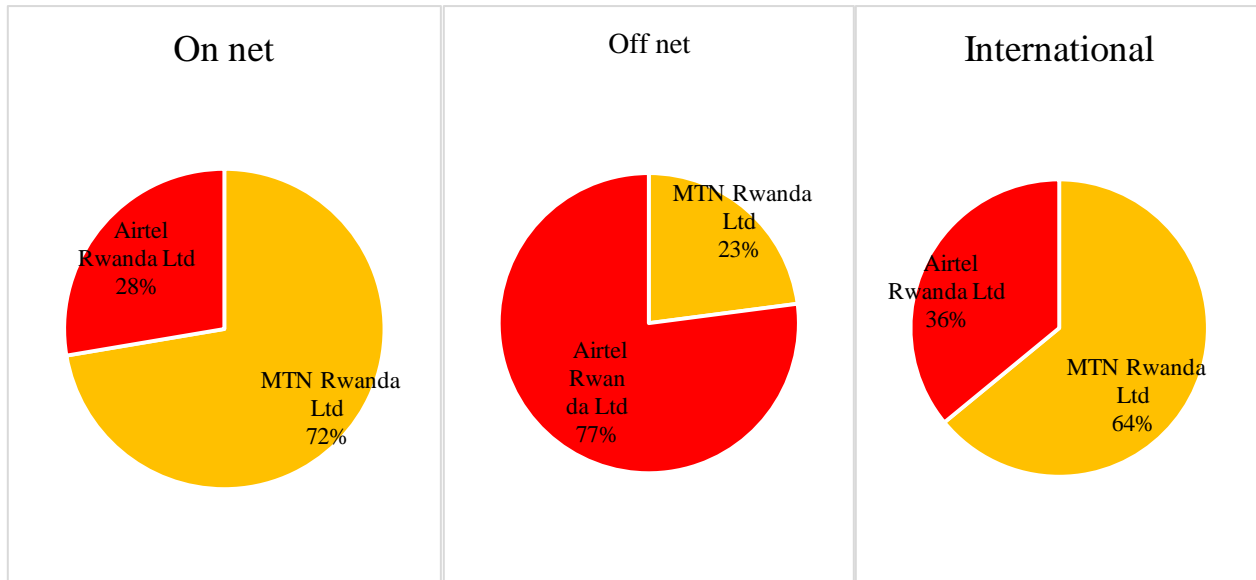
**Table 5: Outgoing and incoming traffic (in minutes) per operator as of the 2<sup>nd</sup> quarter 2020**

Voice traffic	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Outgoing calls			
On net	4,210,589,671	1,609,901,937	5,820,491,608
Off net	14,349,174	48,213,243	62,562,417
International	7,487,888	4,202,167	11,690,055
Incoming calls			
International	7,948,866	7,396,867	15,345,733

**Source: Operators' reports, June 2020**

During this quarter under review, the total volume of minutes originating within mobile networks was 5.8 billion minutes, the total minutes originating from one mobile networks to other networks was 62.5 million minutes, and the total minutes from mobile networks to international networks was 11.6 million minutes. The number of minutes from international networks to local mobile networks was 15.3 million minutes.

**Figure 4: Outgoing on net, off net and international voice traffic market share as of the 2<sup>nd</sup> quarter 2020**



Source: Operators' reports, June 2020

**Table 6: Average minutes per call per operator in the 2<sup>nd</sup> quarter 2020**

During the second quarter 2020, the average minutes per call within mobile telecom networks was 2.6, average minutes per call to call other networks was 1.3 and the average minutes per call from Rwanda mobile networks to international networks was 3.7. The average minutes per call from international networks to Rwanda mobile networks was 2.5.

Voice traffic	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Outgoing calls			
On net	2.5	2.9	2.6
Off net	0.8	1.7	1.3
International	4.0	3.2	3.7
Incoming calls			
International	2.1	3.1	2.5

Source: Operators' reports, June 2020

### 1.4.2. Outgoing and incoming SMS traffic

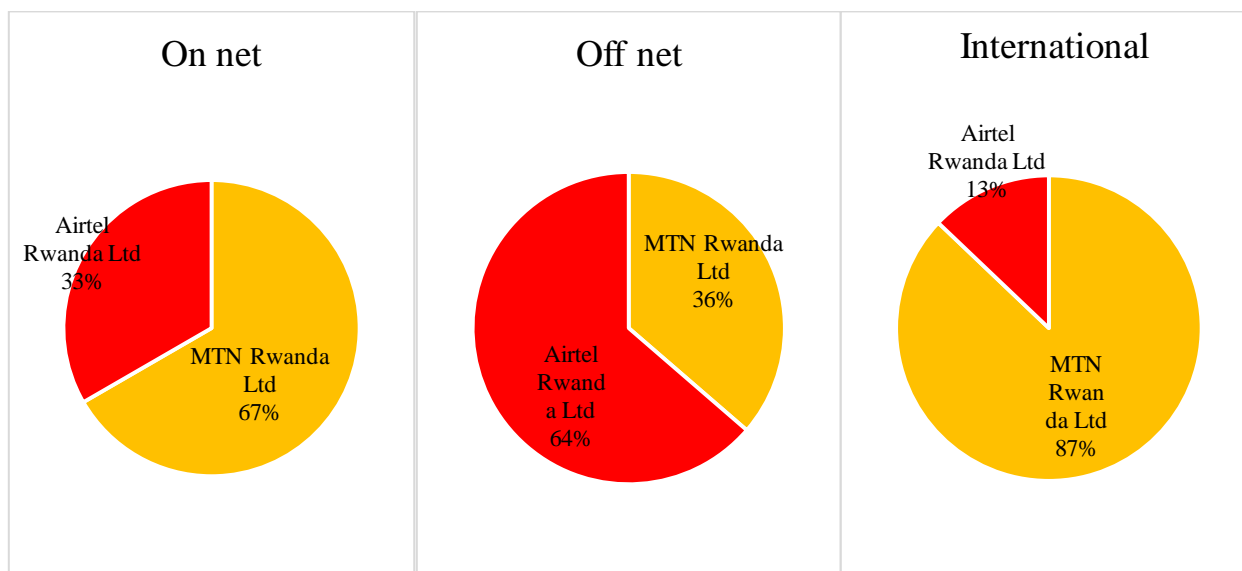
The total volume of SMS traffic originating within mobile networks was 925.6 million SMS, the total SMS traffic originating from mobile networks to other mobile networks was 7.2 million SMS and the total SMS traffic from mobile networks to international networks was 0.3 million SMS. The number of SMS from international networks to Rwanda was 0.6 million SMS.

**Table 7: SMS traffic (in numbers) as of the second quarter 2020**

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
<b>Outgoing SMS</b>			
On net	617,066,920	308,597,220	925,664,140
Off net	2,633,099	4,611,162	7,244,261
International	333,631	49,369	383,000
<b>Incoming SMS</b>			
International	289,662	362,672	652,334

Source: Operators' reports, June 2020

**Figure 5: Outgoing on net, off net and international SMS traffic market share as of the second quarter 2020**



Source: Operators' reports, June 2020

## 2. ROAMING

### 2.1. Roaming subscribers

The international roaming subscribers during the second quarter of the year 2020 stood at 1.5 million foreign subscribers roamed on local networks whereas 0.7 million local subscribers roamed on foreign networks.

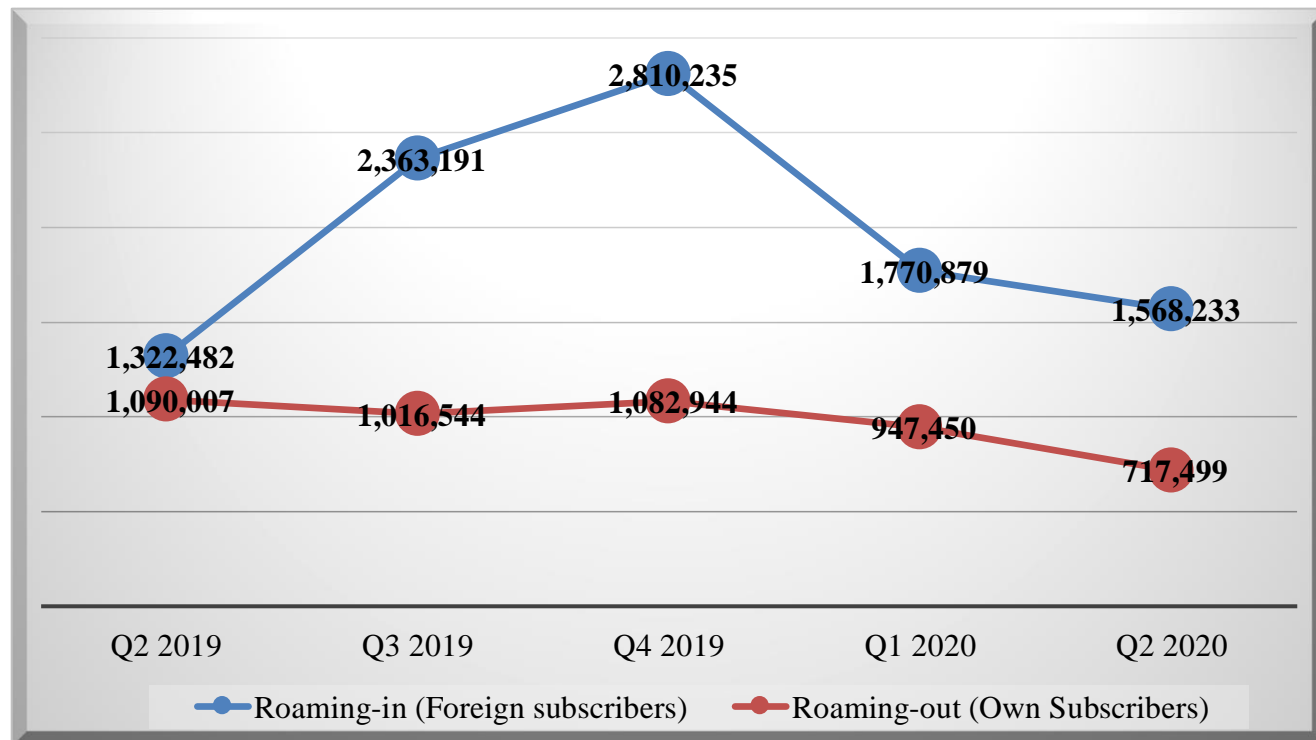
**Table 8: International roaming subscribers as of the second quarter 2020**

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Roaming-in (Foreign subscribers)	579,787	988,446	1,568,233
Roaming-out (Own Subscribers)	494,061	223,438	717,499

Source: Operators' reports, June 2020

**Figure 6: Trend of roaming subscribers from Q2 2019 to Q2 2020**

During the quarter under review, the number of roamers-out decreased by 11.4% to 717,499 from 947,450 subscribers and the number of roamers-in decreased by 24.3 percent to 1,568,233 from 1,770,879 subscribers recorded during the previous quarter.



Source: Operators' reports, June 2020

## 2.2. Roaming traffic

During the quarter under review, the total volume of outgoing traffic generated by foreign subscribers roaming in Rwanda was 0.6 million minutes whereas the total minutes generated by Rwanda mobile networks' subscribers roamed outside the country was 1.1 million minutes. The total incoming traffic on foreign subscribers roamed in Rwanda was 26.2 million minutes and 22.5 million minutes for local subscribers roamed on foreign networks.

**Table 9: Outgoing and incoming roaming traffic (in minutes) per operator as of the second quarter 2020**

Destination	Own subscribers roaming on foreign networks			Foreign subscribers roaming on local networks		
	MTN	Airtel	Total	MTN	Airtel	Total
Incoming	21,539,936	1,005,408	22,545,343	19,682,512	6,518,500	26,201,012
Outgoing	1,124,995	33,254	1,158,249	460,546	188,368	648,914
Total	22,664,931	1,038,661	23,703,592	20,143,058	6,706,868	26,849,925

**Source: Operators' reports, June 2020**

### 3. FIXED TELEPHONE SERVICES

#### 3.1. Fixed telephone subscriptions

As of June 2020, 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. The fixed telephone subscriptions registered for every 100 people 0.092.

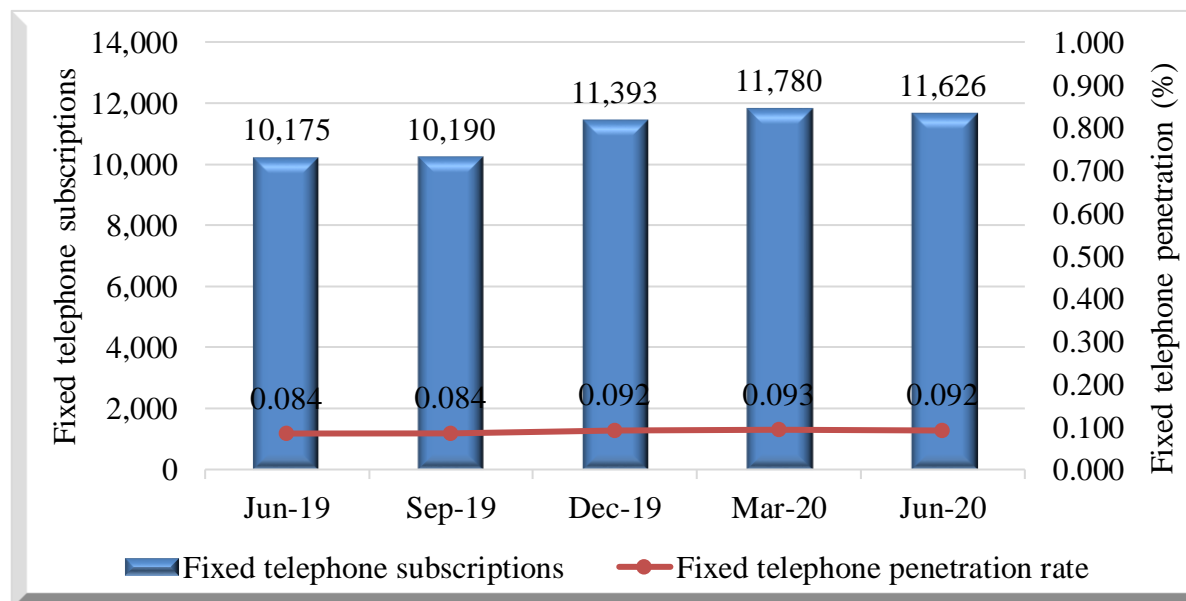
**Table 10: Fixed telephone subscriptions as of June 2020**

Name of Operator	Fixed telephone subscriptions	Fixed telephone penetration rate (%) <sup>3</sup>
MTN Rwanda Ltd	171	<b>0.092</b>
Airtel Rwanda Ltd	9,523	
Liquid Telecom Ltd	802	
BSC Ltd	1,130	
<b>Total</b>	<b>11,626</b>	

Source: Operators' reports, June 2020

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

At the end of June 2020, the number of fixed telephone subscriptions increased up to 11,626 from 10,175 recorded as of the second quarter of 2019. As result, fixed telephone penetration rate increased up to 0.092 percent from 0.084 percent.

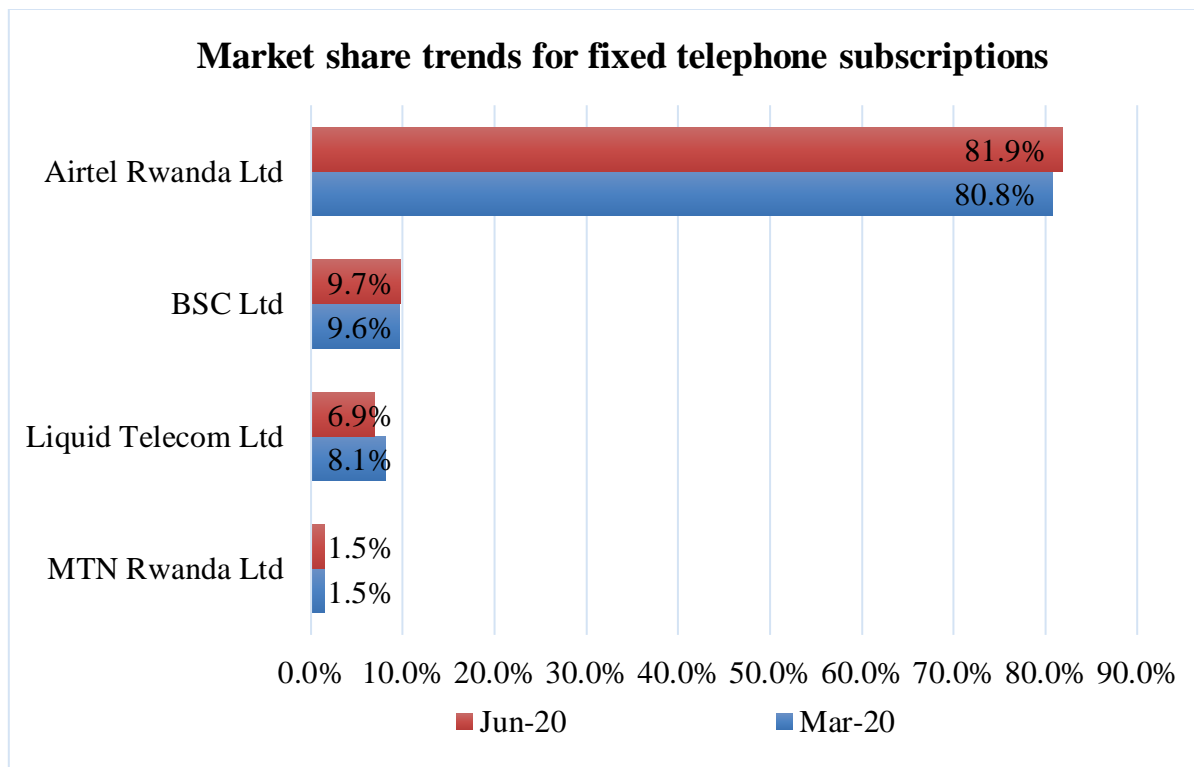


Source: Operators' reports, June 2020

<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 8: Market share trends for fixed telephone subscriptions per operator as of June 2020**

At the end of the second quarter of 2020, the market shares in fixed telephone subscriptions for Airtel Rwanda Ltd increased by 1.1 percentage points to stand at 81.9 percent, the market shares for BSC Ltd increased by 0.1 percentage points up to 9.7 percent, while Liquid Telecom Ltd decreased by 1.2 percentage points to record the market shares of 6.9 percent. The market shares for MTN Rwanda Ltd remained constant at 1.5 percent.



Source: Operators' reports, June 2020

### 3.2. Fixed telephone traffic

During this second quarter of the year 2020, the total volume of minutes originating within operators by fixed telephone lines was 3.1 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 0.7 thousand minutes. The number of minutes from international networks to local fixed telephone lines was 431 minutes.

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

Voice traffic	MTN Rwanda Ltd	Airtel Rwanda Ltd	Liquid Telecom Ltd	Total
Outgoing calls				
On net	3,040,728	111,036	6,645	3,158,409
Off net	83,136	19,332	191,470	293,939
International	44,119	2,708	26,679	73,506
Incoming calls				
International	114	119	198	431

Source: Operators' reports, June 2020

### 3.3. Fixed telephone service tariff

During the second quarter of the year 2020, the average tariff for calling by fixed telephone within telecom operator was 30 Frw, 37 Frw between telecom operators, and 183 Frw to call in One Area Network Countries.

**Table 12: Fixed telephone service tariff structure (in Frw) per minute as of June 2020**

Destination	Liquid Telecom Ltd	MTN Rwanda Ltd	Airtel Rwanda Ltd	Average
On net	10	45	35	30
Off net	30	45	35	37
ONA	408	70	70	183

Source: Operators' reports, June 2020



## 4. INTERNET SERVICE PROVISION

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

At the end of June 2020, there was 7,875,982 active SIM cards subscribed to the internet and 10,789 active fixed internet subscriptions. The table below displays the internet subscriptions per operator.

**Table 13: Internet subscriptions per category as of June 2020**

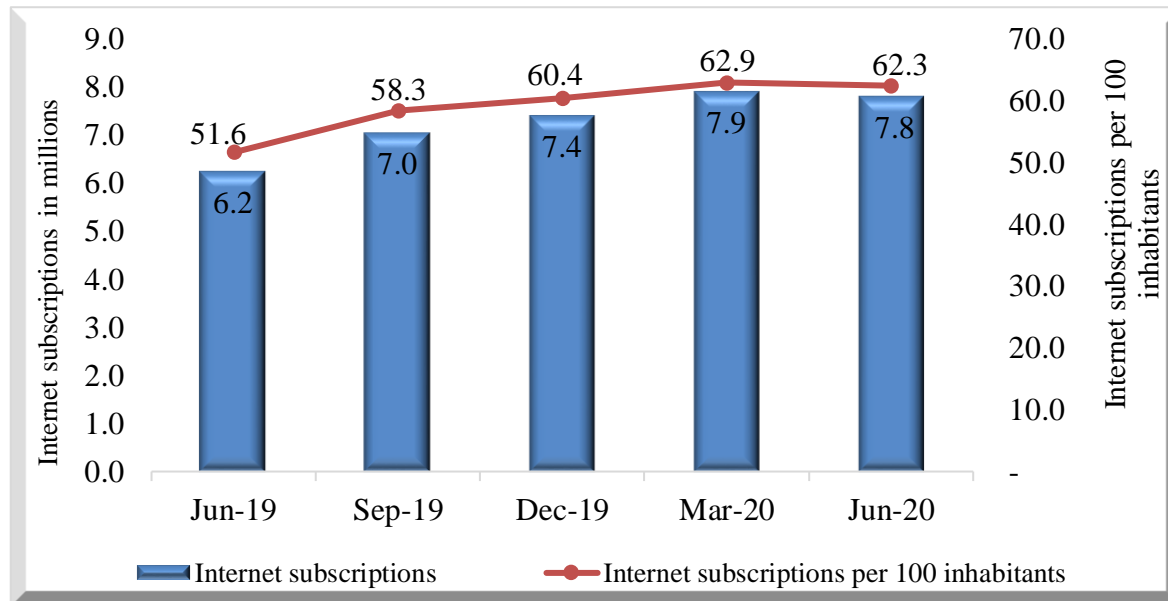
Name of operators	Fixed internet subscriptions		Mobile internet subscriptions			Total internet subscriptions
	Narrowband ( $\leq 256$ kbps)	Broadband ( $\geq 256$ kbps)	EDGE	3G	4G	
MTN Rwanda Ltd	87	1,603	3,287,543	849,231	450,091	4,588,555
Airtel Rwanda Ltd		1,357	2,439,659	648,331	112,000	3,201,347
Axiom Networks Ltd		176				176
4NETAFRICA Ltd		3			318	321
BCS Ltd		11				11
BSC Ltd		2,829			11,388	14,217
Liquid Telecom Ltd		3,491				3,491
CBNET Ltd		5			1,005	1,010
G-MAX Ltd		8			372	380
ISCO ISP Ltd		22			2,650	2,672
Net Link Ltd		1			380	381
Piramie INC					573	573
Simba Supermarket					346	346
TRUCONNECT		22			2,137	2,159
BK Techouse		5			848	853
FASTNET		17			4,030	4,047
ISPA Ltd		138				138
Mango Telecom Ltd		5			56,281	56,286
POPCONN Ltd		7			4,245	4,252
RTN Ltd					1,056	1,056
Ac Group Ltd					321	321
Smart Broadband Ltd					758	758
TNSP		27			2,049	2,076
NETPRO Ltd					370	370
Revolution Air Ltd		45				45
GVA Rwanda Ltd		930				930
<b>Total</b>	<b>87</b>	<b>10,702</b>	<b>5,727,202</b>	<b>1,497,562</b>	<b>651,218</b>	<b>7,886,771</b>
<b>Penetration rate (%)</b>	<b>0.0</b>	<b>0.1</b>	<b>45.2</b>	<b>11.8</b>	<b>5.1</b>	<b>62.3</b>

Source: Operators' reports, June 2020

<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.

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

The total number of internet subscriptions increased by 26.5 percent up to 7.8 million from 6.2 million registered at the end of June 2019 whereas there was a slight decrease of 1.3 percent between June 2020 and March 2020. At the end of June 2020, the internet subscriptions registered for every 100 people was 62.3.



Source: Operators' reports, June 2020

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

At the end of June of the year 2020, the 99.2 percent of the fixed internet subscriptions are subscribed to the speed greater or equal 256 kbps, whereas 0.8 percent of the total internet subscriptions are below 256 kbps.

Speed	Fixed internet subscriptions	
	June 2020	March 2020
< 256 kbps	87	90
[256 kbps-2Mbps [	1,625	1,669
[2 Mbps -10 Mbps [	2,783	3,494
[10 Mbps-30Mbps [	4,867	3,241
[30 Mbps < 100Mbps [	1,387	973
≥ 100 Mbps	40	43
<b>Total</b>	<b>10,789</b>	<b>9,510</b>

Source: Operators' reports, June 2020

<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.

**Table 15: Fixed internet subscriptions by technology**

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

Technology	Fixed internet subscriptions	
	June 2020	March 2020
Satellite	32	20
DSL	88	121
Terrestrial fixed wireless	1,209	1,189
Fiber-to-the home/building	8,103	6,866
Others	1,357	1,314
<b>Total</b>	<b>10,789</b>	<b>9,510</b>

Source: Operators' reports, June 2020

#### 4.2. International internet bandwidth

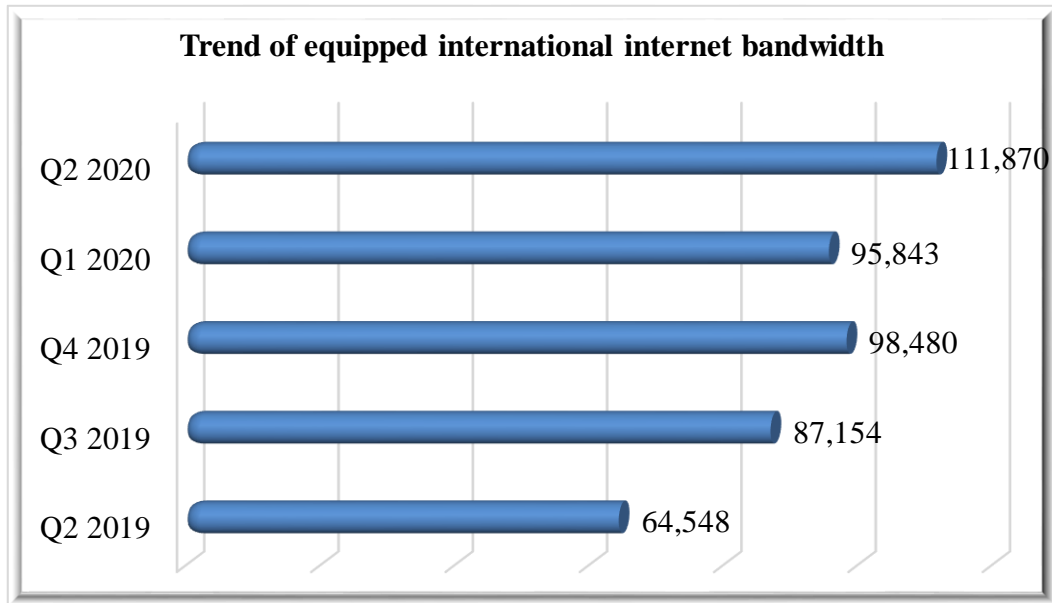
**Table 16: International internet bandwidth (Mbps) per operator as of the second quarter 2020**

Name of operator	Equipped bandwidth	Used bandwidth
MTN Rwanda Ltd	15,000	11,216
Liquid Telecom Ltd	80,000	23,193
Airtel Rwanda Ltd	7,552	7,273
BSC Ltd	4,900	3,757
KTRN Ltd	2,244	6,434
Axiom Networks	2,174	1,477
<b>Total</b>	<b>111,870</b>	<b>53,351</b>

Source: Operators' reports, June 2020

**Figure 10: Trend of equipped international internet bandwidth (Mbps) from Q2 2019 to Q2 2020**

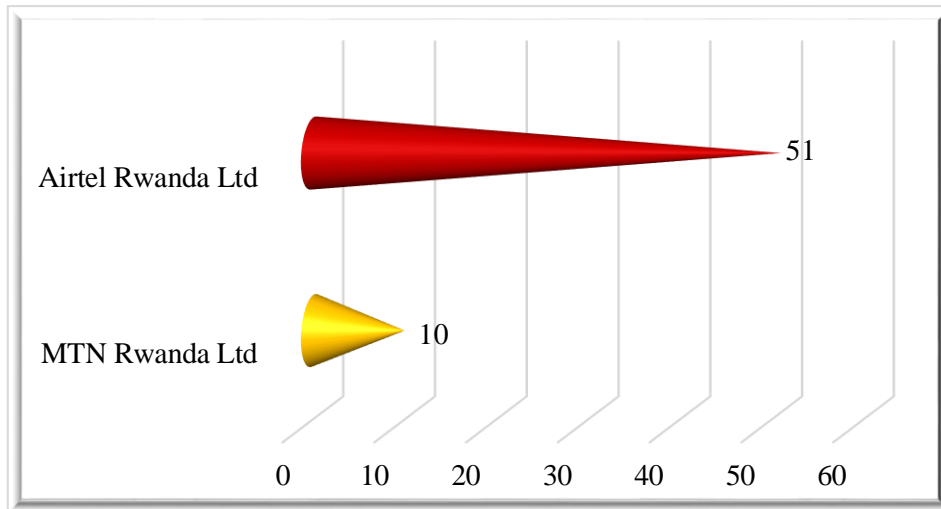
During the quarter under review, the total equipped international internet bandwidth available in the country was 111,870 Mbps. This total equipped international internet bandwidth excludes 9,122 Mbps supplied by Liquid Telecom Ltd to KTRN Ltd and BSC Ltd.



Source: Operators' reports, June 2020

### 4.3. Mobile internet tariff

Figure 11: Standard mobile internet tariff (Frw/MB) as of the second quarter 2020



Source: Operators' reports, June 2020

## 5. TELECOMMUNICATION REVENUES AND INVESTMENT

**Table 17: Trend of quarterly revenues (Frw) from Q3 2019 to Q2 2020**

<b>Category</b>	<b>Q3 2019</b>	<b>Q4 2019</b>	<b>Q1 2020</b>	<b>Q2 2020</b>
Total Revenues for MNOs and Liquid Telecom Ltd	44,241,230,904	44,402,330,838	43,209,193,088	44,860,787,018
Total revenues for ISPs and Wholesale Network Service Provider	9,050,378,265	9,580,433,557	7,864,369,646	10,132,162,379
<b>Total</b>	<b>53,291,609,169</b>	<b>53,982,764,395</b>	<b>51,073,562,735</b>	<b>54,992,949,398</b>

Source: Operators' reports, June 2020

**Table 18: Trend of additional investment (Frw) made in the second quarter 2020**

<b>Category</b>	<b>Q3 2019</b>	<b>Q4 2019</b>	<b>Q1 2020</b>	<b>Q2 2020</b>
Total investment for MNOs and Liquid Telecom Ltd	4,255,780,732	22,750,234,255	19,555,498,876	16,327,806,071
Total investment for ISPs and Wholesale Network Service Provider	965,395,622	2,255,480,515	3,435,833,387	1,185,266,915
<b>Total</b>	<b>5,221,176,354</b>	<b>25,005,714,770</b>	<b>22,991,332,263</b>	<b>17,513,072,986</b>

Source: Operators' reports, June 2020

## 6. EMPLOYMENT IN TELECOMMUNICATION SECTOR

One thousand one hundred twenty-seven (1,127) persons were employed in telecommunication sector at the end of June 2020, nine hundred and thirty-one (931) are permanent staff while one hundred ninety-six (196) are temporary staff. There were also four hundred and seventy-eight (478) outsourced staff employed by telecommunication sector. The table below illustrates the number of employed persons by operator.

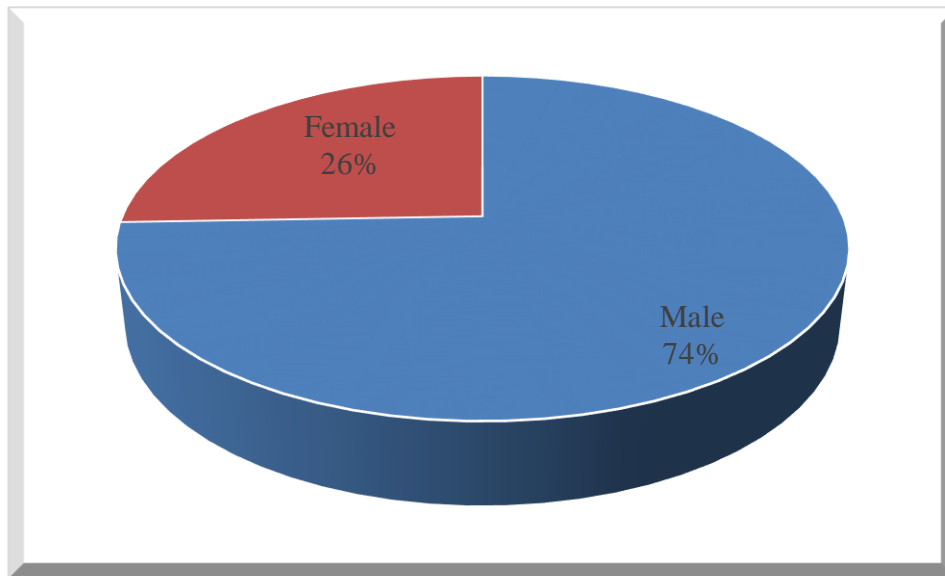
**Table 19: Number of staff employed in telecommunication sectors as of June 2020**

Name of operator	Type of contract			Gender		Domestic and foreign employees		Outsourced staff
	Temporary	Permanent	Total	Female	Male	Domestic	Foreign	
MTN Rwanda Ltd	8	276	284	86	198	276	8	285
Airtel Rwanda Ltd	0	128	128	17	111	121	7	188
Liquid Telecom Ltd	94	63	157	24	133	153	4	0
ISPA Ltd	2	12	14	4	10	14	0	0
G-MAX	0	6	6	2	4	6	0	0
TRUCONNECT	3	5	8	3	5	8	0	0
Axiom Networks Ltd	3	26	29	11	18	26	3	0
4NetAfrica Ltd	0	1	1	0	1	1	0	0
TNSP	19	7	26	4	22	26	0	2
KTRN Ltd	2	109	111	29	82	108	3	0
Piramie INC	4	1	5	2	3	3	2	1
POPCONN Ltd	0	14	14	4	10	13	1	0
BSC Ltd	14	59	73	19	54	73	0	0
BCS Ltd	0	1	1	0	1	1	0	0
AC Group Ltd	0	38	38	10	28	38	0	0
FASTNET	3	4	7	3	4	7	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	2	15	17	3	14	17	0	0
Mango Telecom Ltd	0	94	94	31	63	92	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	20	20	6	14	20	0	0
Smart Broadband Ltd	0	4	4	2	2	4	0	0
NETPRO LTD	0	5	5	2	3	5	0	0
Revolution Air Ltd	2	11	13	5	8	13	0	0
GVA Rwanda Ltd	37	17	54	16	38	54	0	0
<b>Total</b>	<b>196</b>	<b>931</b>	<b>1,127</b>	<b>288</b>	<b>839</b>	<b>1,096</b>	<b>31</b>	<b>478</b>

Source: Operators' reports, June 2020

The two hundred seventy-four (288) staff representing 26 percent of the total staff are female whereas 74 percent are male as it is shown in the figure below. The two hundred and twenty-seven (255) representing 53 percent of the total outsourced staff are female.

**Figure 12: Telecom staff by gender as of June 2020**



**Source: Operators' reports, June 2020**

## 7. MEDIA AND BROADCASTING

The table below shows the number of licensed TV stations, FM Radio Broadcasters, Online Media Houses, and signal distributors registered to operate in Rwanda during the second quarter of the year 2020.

### 7.1. Licensed media operators

During the quarter under review, there were two (2) licensed signal distributors, three (3) pay TV operators, thirty-four (34) FM radio stations, nineteen (19) television stations, twenty-three (23) online media houses, thirty-one (31) print media houses, and three (3) international media houses.

**Table 20: Trends of Licensed media operators from June 2019 to June 2020**

Category	Jun-2019	Sep-2019	Dec-2019	Mar-2020	Jun-2020
Signal distributors	2	2	2	2	2
Pay TV operators	4	3	3	3	3
FM Radio stations	34	34	33	34	34
Television stations	21	18	18	18	19
Online media houses	23	23	23	23	23
Print media houses	30	30	30	31	31
International media house	3	3	3	3	3

Source: RURA database

### 7.2. Pay TV subscriptions

The total number of active subscribers was 59,694 recorded at the end of the second quarter of the year 2020 whereas registered subscribers were 302,902.

**Table 21: Number of Pay TV subscribers as of June 2020**

Name of Pay TV	Active Subscribers	Registered Subscribers
Azam Media Ltd	2,373	13,803
Star Africa Media Ltd	35,619	257,855
Tele 10 Ltd	21,702	31,244
<b>Total</b>	<b>59,694</b>	<b>302,902</b>

Source: Operators' reports, June 2020



### 7.3. Decoders sold

During this quarter under review, the number of decoders sold by Pay TV operators decreased to three thousand seven hundred and thirty-five (3,735) from six thousand one hundred (6,100) recorded in the previous quarter.

**Table 22: Trend of decoders sold from 2<sup>nd</sup> quarter 2019 to 2<sup>nd</sup> quarter of 2020**

<b>Number of Decoders Sold</b>	<b>Q2 2019</b>	<b>Q3 2019</b>	<b>Q4 2019</b>	<b>Q1 2020</b>	<b>Q2 2020</b>
Azam Media Ltd	795	426	118	117	98
Star Africa Media Ltd	2,370	789	4,205	5,618	3,193
Tele 10 Ltd	373	389	498	365	444
<b>Total</b>	<b>3,538</b>	<b>1,604</b>	<b>4,821</b>	<b>6,100</b>	<b>3,735</b>

Source: Operators' reports, June 2020

### 7.4. Pay TV staff

**Table 23: Number of staff employed in Pay TV operators as of June 2020**

<b>Operator</b>	<b>Staff per type of contract</b>			<b>Staff per gender</b>		<b>Origin</b>	
	<b>Temporary</b>	<b>Permanent</b>	<b>Total</b>	<b>Female</b>	<b>Male</b>	<b>Domestic</b>	<b>Foreign</b>
Azam Media Ltd	0	11	11	3	8	10	1
Star Africa Media Ltd	3	87	90	22	68	83	7
Tele 10 Ltd	0	29	29	9	20	29	0
<b>Total</b>	<b>3</b>	<b>127</b>	<b>130</b>	<b>34</b>	<b>96</b>	<b>122</b>	<b>8</b>

Source: Operators' reports, June 2020

The total number of staff employed by Pay TV operators as of June 2020 was 130 of which 69.2% are employed by Star Africa Media Ltd, 22.3% by Tele 10 Ltd, and 8.5% are employed by Azam Media Ltd. The three-four (34) staff representing 26.2% of the total staff are female.