



**STATISTICS REPORT FOR TELECOM,  
MEDIA AND POSTAL SECTOR AS OF THE  
THIRD QUARTER OF THE YEAR 2019**

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

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## I. PRELIMINARY REMARKS

This report compiles the information from telecom operators, internet service providers, 4G wholesaler, 4G retailers, and Pay TV operators as per their license obligations.

**Table 1: Key ICT indicators**

INDICATORS	Q2 2019	Q3 2019	% change between Q2 and Q3
<b>SUBSCRIPTIONS</b>			
Mobile-cellular telephone subscriptions	9,040,327	9,390,913	3.9
Fixed telephone subscriptions	10,175	10,190	0.1
Mobile-cellular telephone subscriptions per 100 inhabitants	74.8	77.7	3.9
Fixed telephone subscriptions per 100 inhabitants	0.0842	0.0843	0.15
<b>VOICE TRAFFIC IN MINUTES</b>			
On-Net Voice Traffic	3,804,781,683	4,048,238,422	6.4
Outgoing Off-Net Voice Traffic	33,419,297	33,365,751	-0.2
International Outgoing mobile voice traffic	9,853,537	9,972,792	1.2
International Incoming mobile voice traffic	24,937,710	31,175,398	25.0
<b>ROAMING TRAFFIC</b>			
Roaming-in (Foreign subscribers)	440,827	787,730	78.7
Roaming-Out (Own subscribers)	363,336	338,848	-6.7
Roaming traffic –In	17,143,896	26,049,834	51.9
Roaming traffic-Out	3,617,395	1,981,856	-45.2
<b>SMS TRAFFIC</b>			
Outgoing SMS On-net	575,901,341	619,133,127	7.5
Outgoing SMS Off-net	5,981,682	6,327,595	5.8
Incoming International SMS	620,432	794,489	28.1
Outgoing International SMS	441,724	359,034	-18.7
<b>DATA/INTERNET</b>			
Internet subscriptions	6,234,520	7,046,527	13.0
Internet subscriptions per 100 inhabitants	51.6	58.3	13.0
<b>BROADCASTING</b>			
Number of Television stations	21	18	-14.3
Number of Radio FM stations	34	34	0.0
<b>POSTAL AND COURIER</b>			
Licensed postal and courier operators	28	28	0.0

**Source: Operators' reports, September 2019**

## 1. MOBILE AND FIXED TELEPHONE SUBSCRIPTIONS

As of September 2019, the operators offering mobile telephone services were MTN Rwanda Ltd, and Airtel Rwanda Ltd, and those offering fixed telephone services were Liquid Telecom Ltd, and Airtel Rwanda Ltd. An active mobile-cellular telephone subscription is defined as a registered mobile SIM card that has generated revenue to the operator within the last 90 days.

**Table 2: Mobile and fixed telephone subscriptions as of September 2019**

Name of operator	Active subscriptions <sup>1</sup>		Mobile telephone subscriptions per 100 inhabitants <sup>2</sup>	Fixed telephone subscriptions per 100 inhabitants <sup>3</sup>
	Mobile telephone	Fixed telephone		
MTN Rwanda Ltd	5,097,592	-	77.7	0.1
Airtel Rwanda Ltd	4,293,321	9,521		
Liquid Telecom Ltd	-	669		
<b>Total</b>	<b>9,390,913</b>	<b>10,190</b>		

**Source: Operators' reports, September 2019**

The majority of Rwandan population are subscribed to mobile network as a platform to share information, access online services, money transfers, cash withdrawal, deposit of cash to bank accounts, getting loans, tax payment, utility payment, purchase of goods and services, payment of school fees, and perform any other service. As a result, the Mobile (SIM card) penetration rate<sup>4</sup> recorded at the end of September 2019 was 77.7 percent whereas the fixed telephone penetration rate<sup>5</sup> was 0.1 percent.

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

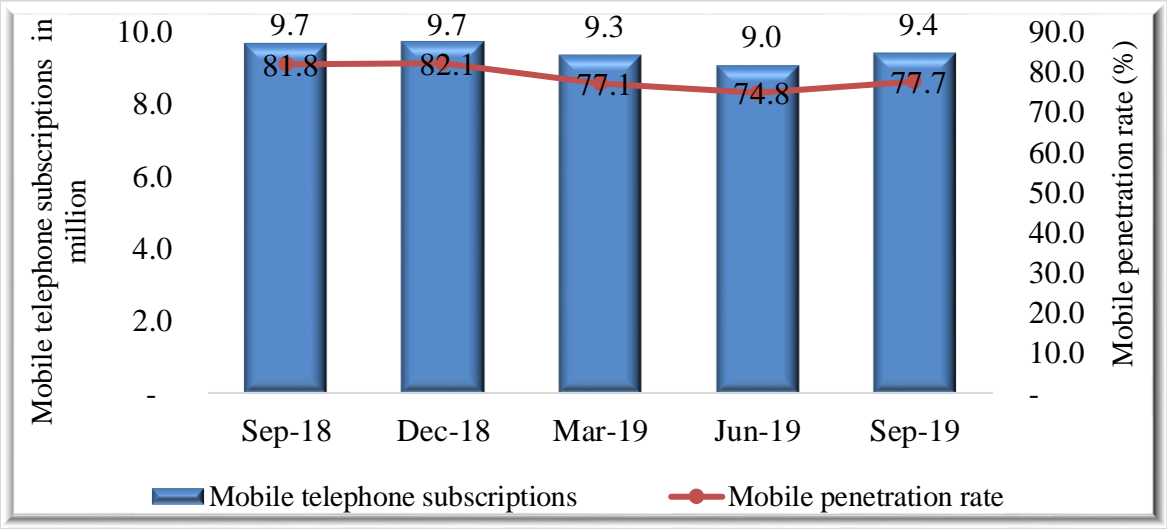
<sup>2</sup> Mobile telephone subscriptions per 100 inhabitants are computed with reference to the sum of active SIM cards over the Rwandan population as projected by National Institute of Statistics of Rwanda.

<sup>3</sup> Fixed telephone subscriptions per 100 inhabitants are computed with reference to the sum of active number of analogue-fixed telephone lines over the Rwandan population as projected by National Institute of Statistics of Rwanda.

<sup>4</sup> Mobile (SIM card) penetration rate: Mobile telephone subscriptions per 100 inhabitants.

<sup>5</sup> Fixed telephone penetration rate: Fixed telephone subscriptions per 100 inhabitants.

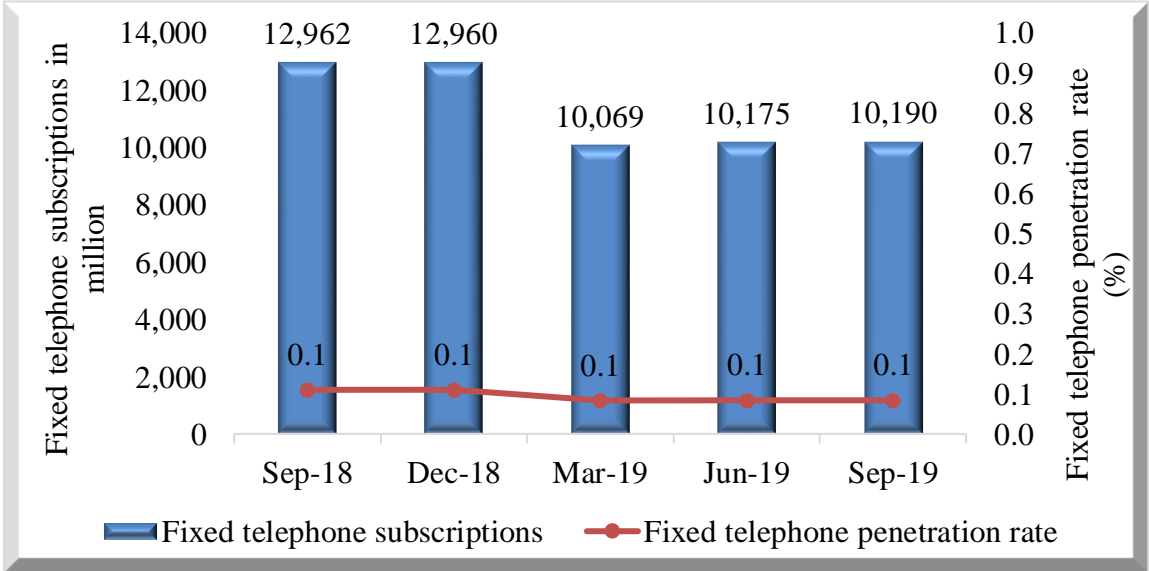
**Figure 1: Trend of mobile telephone subscriptions and mobile penetration rate as of September 2019**



**Source: Operators’ reports, September 2019**

As of September 2019, the number of active mobile telephone subscriptions in the country increased to 9.4 million from 9.0 million reported at the end of June 2019. During this period under review, the mobile penetration rate increased to 77.7 percent from 74.8 percent recorded in the second quarter of 2019.

**Figure 2: Trend of fixed telephone subscriptions and fixed telephone penetration rate as of September 2019**



**Source: Operators’ reports, September 2019**

The number of fixed telephone subscriptions increased to 10,190 at the end of September 2019 from 10,175 recorded as of the second quarter of 2019. As result, fixed telephone subscriptions per 100 inhabitants was 0.1 percent.

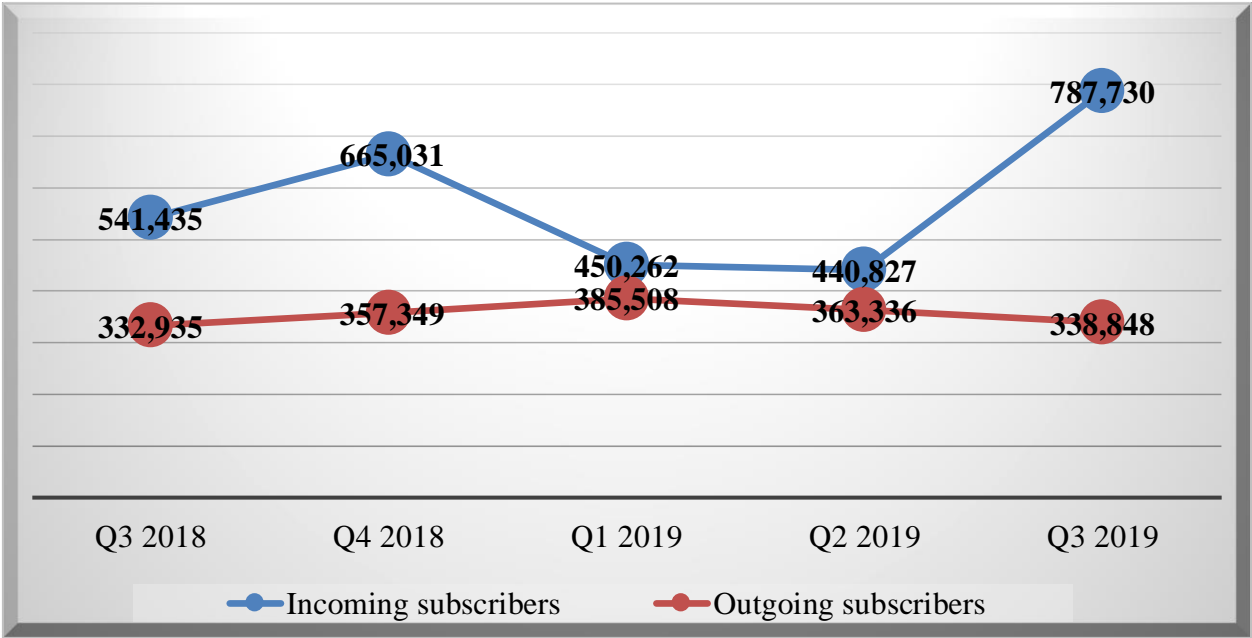
**Table 3: International average roaming subscribers as of September 2019**

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Incoming	222,685	565,045	787,730
Outgoing	226,297	112,551	338,848

Source: Operators’ reports, September 2019

The international average roaming subscribers during the third quarter of the year 2019 stood at 787,730 and 338,848 for incoming and outgoing subscribers respectively.

**Figure 3: Trend of average roaming subscribers from September 2018 to September 2019**



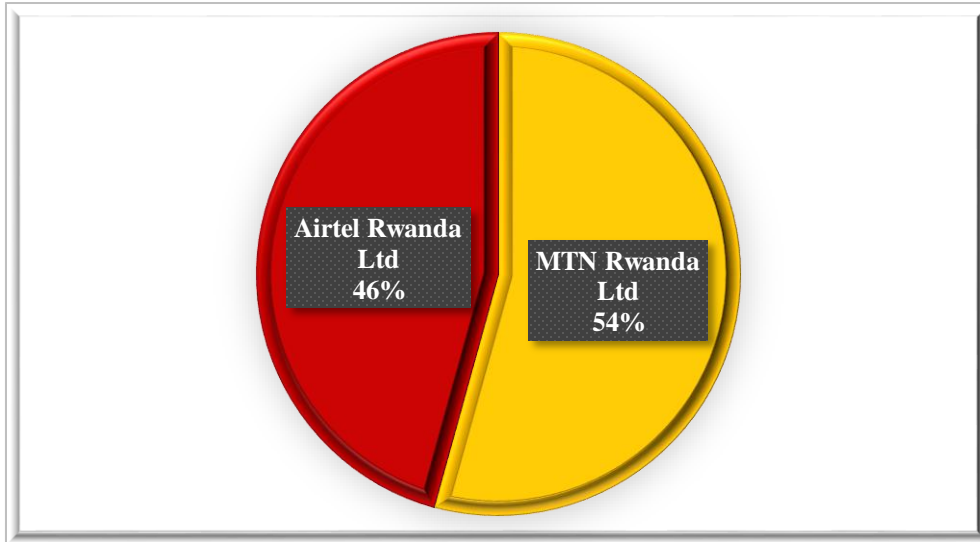
Source: Operators’ reports, September 2019

The average number of roamers out decreased to 338,848 from 363,336 subscribers whereas the number of roamers in increased by 78.7 percent to 787,730 from 440,827 subscribers recorded during the previous quarter.



## 2. MARKET SHARE

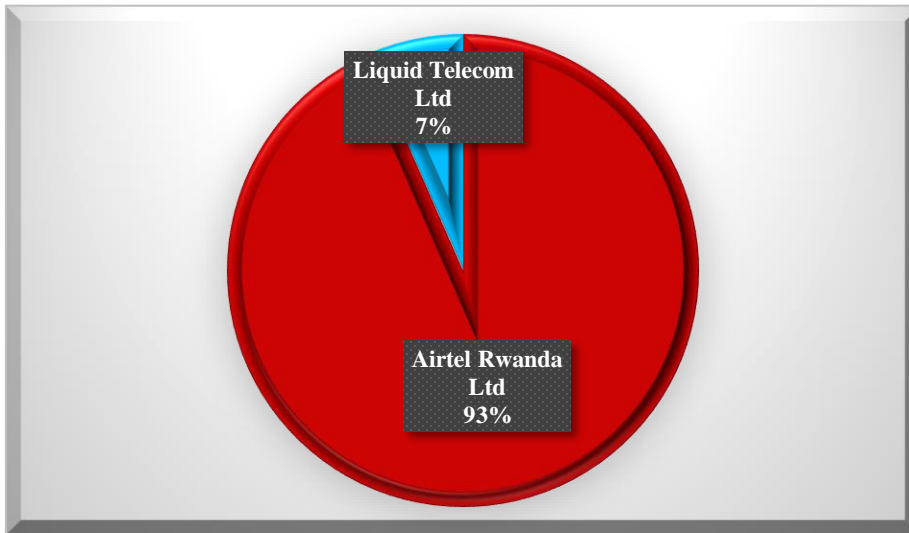
Figure 4: Market share for mobile telephone subscriptions per operator as of September 2019



Source: Operators' reports, September 2019

During the quarter under review, MTN Rwanda Ltd recorded 54 percent of the market share in active mobile-cellular telephone subscriptions whereas Airtel Rwanda Ltd had 48 percent.

Figure 5: Market share for fixed telephone subscriptions per operator as of September 2019



Source: Operators' reports, September 2019

At the end of the third quarter of 2019, Airtel Rwanda Ltd recorded the largest market share of 93 percent in fixed telephone subscriptions whereas Liquid Telecom Ltd had 7.0 percent.

### 3. VOICE AND SMS TARIFF STRUCTURE

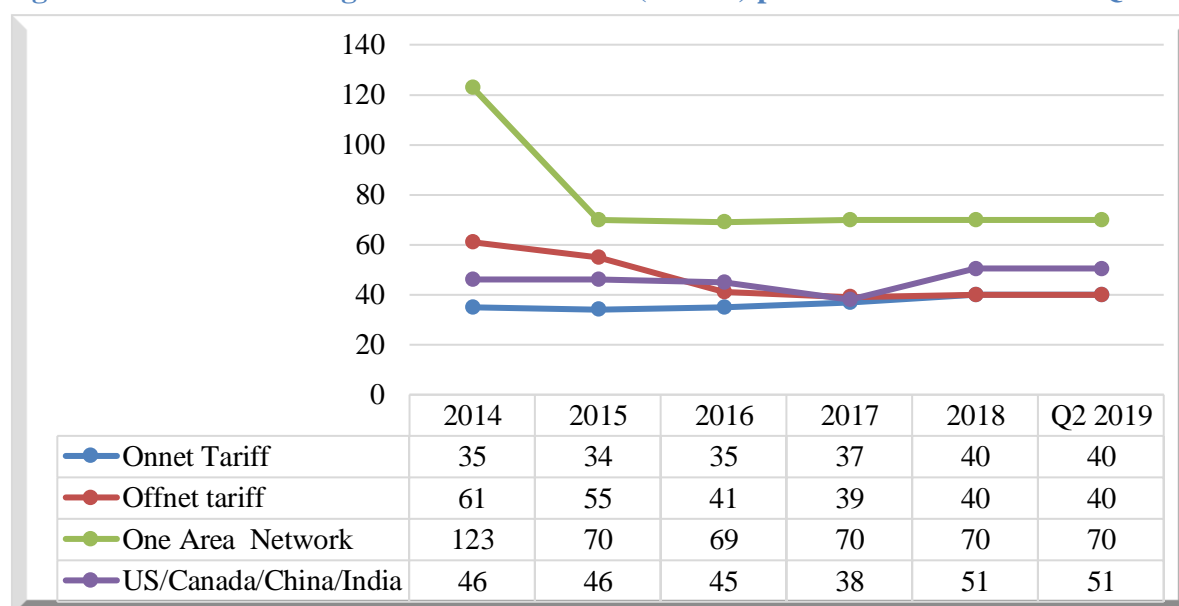
**Table 4: Mobile telephone voice tariff (in Rwf) per minute per operator as of September 2019**

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Average
Onnet Tariff	45	35	40
Offnet Tariff	45	35	40
One Area Network	70	70	70
US/Canada/China/India	51	50	51

Source: Operators' reports, September 2019

As of September 2019, the average tariff for calling by mobile phone within a telecom operator was 40 Rwf, while 40 Rwf was between telecom operators, 70 Rwf for One Area Network, and 51 Rwf to call in US, Canada, China, and India.

**Figure 6: Trend of average mobile voice tariff (in Rwf) per minute from 2014 to Q3 2019**



Source: Operators' reports, September 2019

**Table 5: Fixed telephone service tariff structure (in Rwf) per minute as of September 2019**

Destination	Liquid Rwanda Ltd	Airtel Rwanda Ltd	Average
On net	20	35	28
Off net	60	35	48
One Area Network	135	70	103

**Source: Operators' reports, September 2019**

As of September 2019, the average tariff for calling by fixed telephone within a telecom operator was 28 Rwf, while 48 Rwf was between telecom operators, and 103 Rwf to call in One Area Network Countries.

**Table 6: SMS tariff structure (in Rwf) as of September 2019**

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Average
On net tariff	12	15	14
Off net tariff	26	15	21
One Area Network	45	40	43
International	80	75	78

**Source: RURA, operators' returns**

As of September 2019, the average tariff for sending a message by mobile phone within a telecom operator was 14 Rwf, whereas 21 Rwf was between telecom operators, 43 Rwf to One Area Network and 78 Rwf to other international countries.

## 4. TRAFFIC STATISTICS

### 4.1. Voice traffic for outgoing and incoming traffic

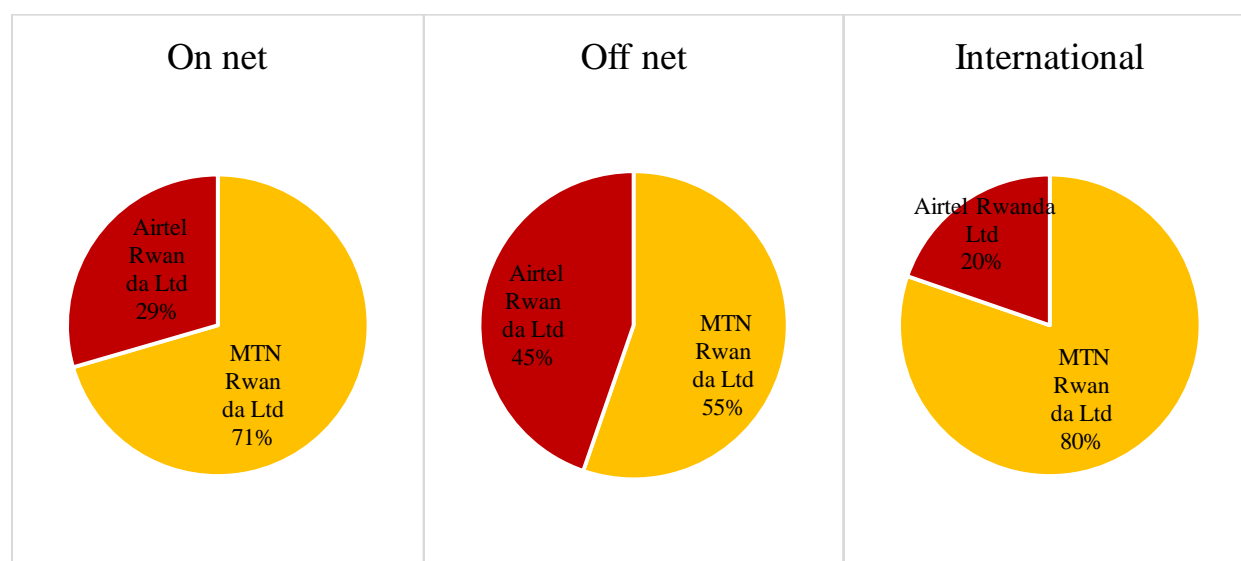
**Table 7: Outgoing and incoming traffic (in minutes) per operator as of the 3<sup>rd</sup> quarter 2019**

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Outgoing calls			
On net	2,854,187,847	1,194,050,575	4,048,238,422
Off net	18,452,098	14,913,653	33,365,751
International	8,006,952	1,965,840	9,972,792
Incoming calls			
Off net	13,562,170	19,860,796	33,422,966
International	22,012,754	9,162,644	31,175,398

**Source: Operators' reports, September 2019**

During this quarter under review, the total volume of minutes originating within mobile networks was 4.0 billion minutes, the total minutes originating from one mobile networks to other mobile networks was 33.3 million, and the total minutes from mobile networks to international networks was 9.9 million. The number of minutes from international networks to mobile networks was 31.1 million.

**Figure 7: Outgoing on net, off net and international voice traffic market share as of the third quarter 2019**



Source: Operators' reports, September 2019

**Table 8: Average minutes per call per operator in the 3<sup>rd</sup> quarter 2019**

Voice traffic	MTN Rwanda Ltd	Airtel Rwanda Ltd	Average minutes per call
Outgoing calls			
On net	12.8	2.5	5.7
Off net	0.7	0.7	0.7
International	0.6	3.8	0.7
Incoming calls			
Off net	0.4	0.8	0.6
International	1.9	4.7	2.3

Source: Operators' reports, September 2019

During the third quarter 2019, the average minutes per call within mobile telecom networks was 5.7, average minutes per call to other mobile networks was 0.7 and the average minutes per call from mobile networks to international networks was 0.7. The average minutes from international calls to Rwandan mobile networks was 2.3.

#### 4.2. Voice for outgoing and incoming roaming traffic

**Table 9: Outgoing and incoming roaming traffic (in minutes) per operator as of the third quarter 2019**

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Incoming	22,834,447	3,215,387	26,049,834
Outgoing	1,161,275	820,581	1,981,856

**Source: Operators' reports, September 2019**

During this quarter, the total volume of minutes generated by foreigners roaming in Rwanda was 26.0 million minutes whereas the total minutes generated by Rwanda mobile networks' subscribers roamed outside the country was around 1.9 million minutes.

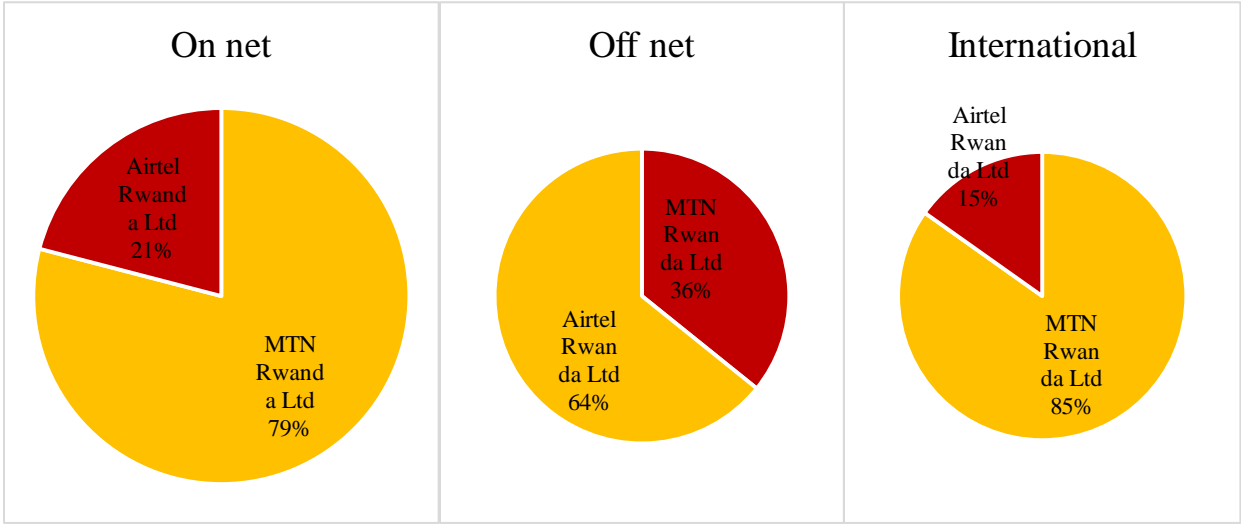
**Table 10: SMS traffic (in numbers) as of the third quarter 2019**

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Outgoing SMS			
On net	489,412,517	129,720,610	619,133,127
Off net	2,264,168	4,063,427	6,327,595
International	673,813	120,676	794,489
Incoming SMS			
Off net	4,738,503	51,043	4,789,546
International	348,704	10,330	359,034

**Source: Operators' reports, September 2019**

The total volume of SMS traffic originating from mobile networks was 619.1 million SMS, the total SMS traffic originating from own mobile networks to other mobile networks was 6.3 million, and the total SMS traffic from mobile networks to international networks was 0.7 million. The number of SMS from international networks to Rwanda was 0.3 million.

**Figure 8: Outgoing on net, off net and international SMS traffic market share as of the third quarter 2019**



Source: Operators' reports, September 2019

## 5. INTERNET SERVICE PROVISION

### 5.1. Internet subscriptions

The total internet subscriptions stood at 7.0 million recorded at the end of the third quarter of the year 2019. The table below displays the internet subscriptions per operator.

**Table 11: Internet subscriptions per category as of September 2019**

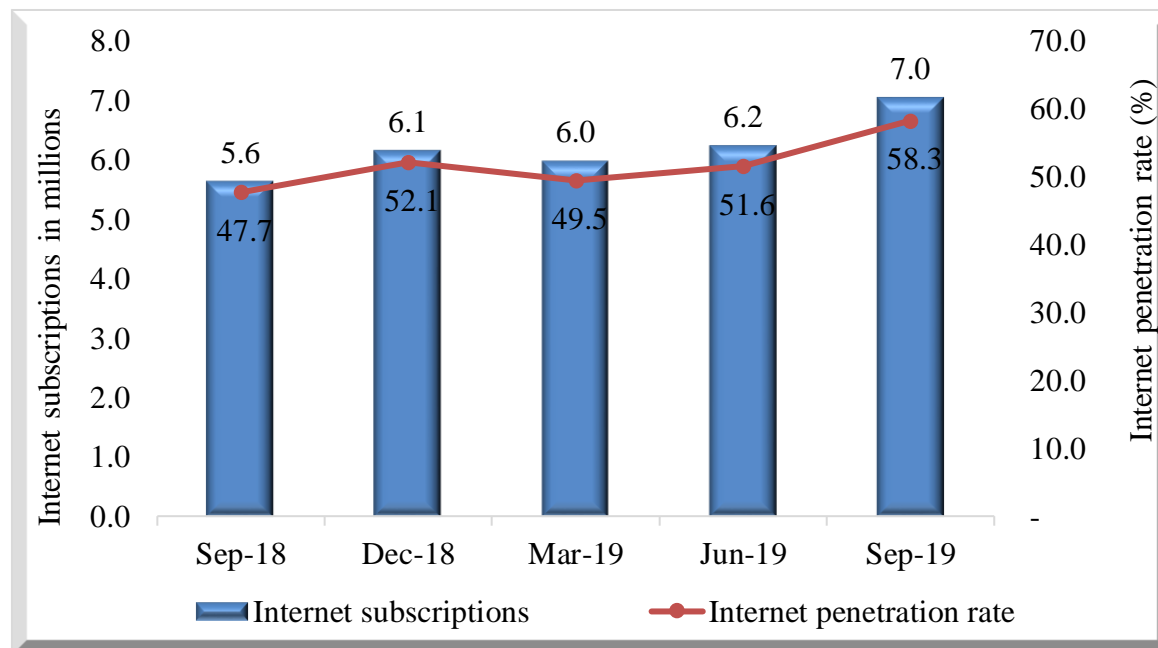
Name of operator	Fixed internet subscriptions <sup>6</sup>		Mobile internet subscriptions <sup>7</sup>			Total internet subscriptions
	Narrowband (≤256kbps)	Broadband (≥256kbps)	EDGE&GPRS	3G	4G	
MTN Rwanda Ltd	96	1,535	2,792,161	1,181,139	8,258	3,983,189
Airtel Rwanda Ltd		1,236	2,278,616	639,152	80,300	2,999,304
Axiom Networks Ltd		251			6	257
4NetAfrica Ltd		3			520	523
BCS Ltd		8				8
BSC Ltd	103	2,685			10,527	13,315
Liquid Telecom Ltd		2,173				2,173
CBNET Ltd		4			1,104	1,108
G-MAX Ltd		10			432	442
ISCO ISP Ltd		18			551	569
NET LINK Ltd		1			315	316
Piramie INC					865	865
Simba Supermarket					471	471
Truconnect		24			984	1,008
BK Techouse		20			686	706
FastNet		18			3,528	3,546
ISPA Ltd		158				158
Mango Telecom Ltd		3			28,856	28,859
POPCONN Ltd		4			4,574	4,578
RTN Ltd					787	787
AC Group Ltd					375	375
Smart Broadband Ltd		2			206	208
SUKU NSA Ltd		38				38
TNSP		15			3,310	3,325
NETPRO Ltd					399	399
<b>Total subscriptions</b>	<b>199</b>	<b>8,206</b>	<b>5,070,777</b>	<b>1,820,292</b>	<b>147,054</b>	<b>7,046,527</b>
<b>Penetration rate (%)</b>	<b>0.0</b>	<b>0.1</b>	<b>41.9</b>	<b>15.1</b>	<b>1.2</b>	<b>58.3</b>

Source: Operators' reports, September 2019

<sup>6</sup> Fixed internet subscriptions: This include subscriptions to the digital subscriber lines network (DSL), fiber-to-the-home/building, satellite broadband, terrestrial fixed wireless broadband, and other fixed (wired)-broadband network.

<sup>7</sup> Mobile internet subscriptions: Number of SIM cards subscribed to the internet and provided revenue to the operator within the last 90 days.

**Figure 9: Trend of internet subscriptions and internet penetration rate as of September 2019**



Source: Operators’ reports, September 2019

During this quarter under review, the number of internet subscriptions increased by 13.0 percent to reach 7.0 million from 6.2 million recorded in the previous quarter. The internet subscriptions per 100 inhabitants<sup>8</sup> at the end of September 2019 was 58.3 percent.

## 5.2. International internet bandwidth

**Table 12: International internet bandwidth (Mbps) per operator as of the third quarter 2019**

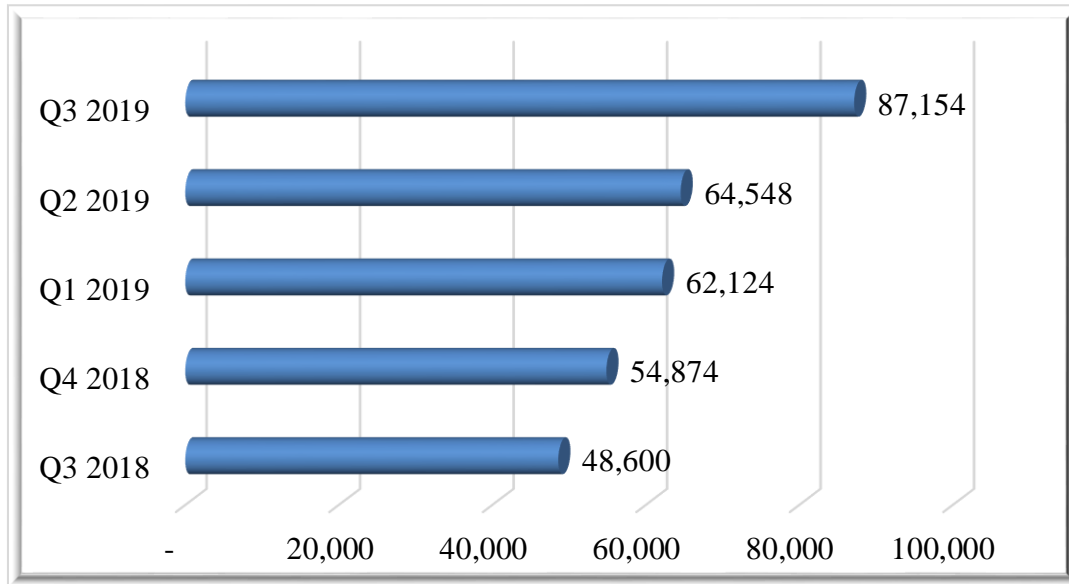
Type	UP Link	Down Link
MTN Rwanda Ltd	7,473	7,473
Liquid Telecom Ltd	60,000	60,000
Airtel Rwanda Ltd	6,333	6,333
ISPA Ltd	250	250
BSC Ltd	5,415	5,415
KTRN Ltd	5,533	5,533
Axiom Networks Ltd	2,150	2,150
<b>Total</b>	<b>87,154</b>	<b>87,154</b>

Source: Operators’ reports, September 2019

<sup>8</sup> Internet subscriptions per 100 inhabitants is the sum of internet subscriptions over the Rwandan population as projected by National Institute of Statistics of Rwanda.



**Figure 10: Trend of equipped international internet bandwidth (Mbps) from 3<sup>rd</sup> quarter 2018 to 3<sup>rd</sup> quarter 2019**

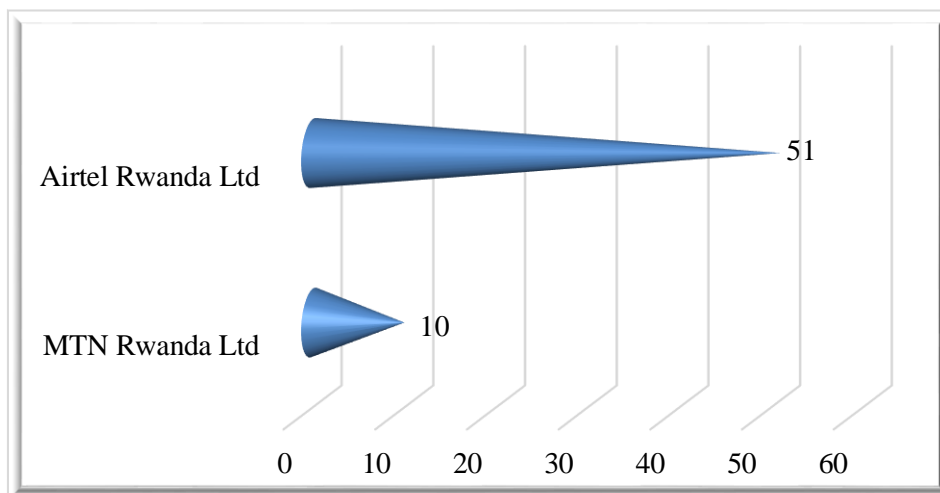


Source: Operators' reports, September 2019

During the quarter under review, the total equipped international internet bandwidth available in the country increased to 87,154 Mbps from 64,548 Mbps reported at the end of the second quarter of year 2019.

### 5.3. Mobile internet tariff

**Figure 11: Standard mobile internet tariff (Rwf/MB) as of the third quarter 2019**



Source: Operators' reports, September 2019

**Table 13: Trend of telecom revenues (Rwf) as of the third quarter 2019**

<b>Category</b>	<b>Q1 2019</b>	<b>Q2 2019</b>	<b>Q3 2019</b>
Total MNOs Revenues and Liquid Revenues	43,863,982,018	42,653,124,423	44,241,230,904
Total ISPs , 4G retailers and wholesale Network Service Provider	8,248,869,214	9,454,298,445	9,050,378,265
Total	52,112,851,233	52,107,422,868	53,291,609,169

**Source: Operators' reports, September 2019**

**Table 14: Trend of telecom investment made in the first three quarters of year 2019**

<b>Category</b>	<b>Q1 2019</b>	<b>Q2 2019</b>	<b>Q3 2019</b>
Total MNOs Revenues and Liquid investment	12,482,904,828	3,959,719,171	4,255,780,732
Total ISPs , 4G retailers and wholesale Network Service Provider	1,266,464,902	833,518,733	965,395,622
Total	13,749,369,731	4,793,237,904	5,221,176,354

**Source: Operators' reports, September 2019**

## 6. EMPLOYMENT IN TELECOMMUNICATION SECTOR

The nine hundred eighty-six (986) persons were employed in telecommunication sector during this quarter under review, eight hundred forty-seven (847) are permanent staffs while one hundred thirty-nine (139) are temporary staffs. The table below illustrates the number of persons employed by operator.

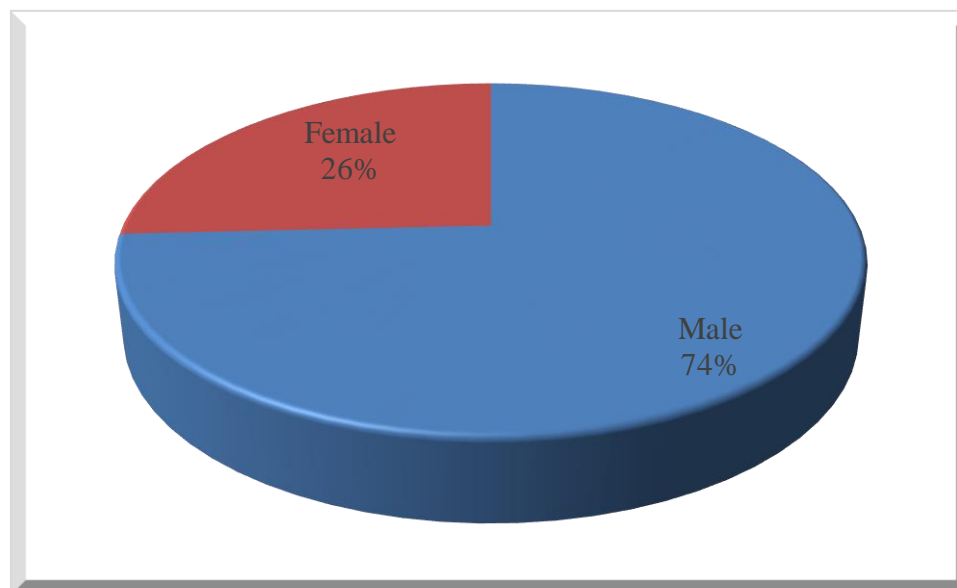
**Table 15: Number of staffs employed in telecommunication sectors as of September 2019**

Operator	Type of contract			Gender		Domestic and foreign employees	
	Temporary	Permanent	Total staff	Female	Male	Domestic	Foreign
MTN Rwanda Ltd	7	279	286	88	198	279	7
Airtel Rwanda Ltd	0	125	125	20	105	116	9
Liquid Telecom Ltd	29	58	87	11	76	83	4
ISPA Ltd	0	16	16	6	10	16	0
G-MAX	0	5	5	2	3	5	0
Truconnect	2	4	6	3	3	6	0
Axiom Networks Ltd	0	26	26	10	16	24	2
4NetAfrica Ltd	6	4	10	3	7	10	0
TNSP	26	10	36	4	32	36	0
KTRN Ltd	1	119	120	29	91	117	3
Piramie INC	4	1	5	2	3	3	2
POPCONN Ltd	0	16	16	5	11	15	1
BSC Ltd	14	55	69	16	53	69	0
BCS Ltd	0	2	2	0	2	2	0
AC Group Ltd	0	38	38	10	28	38	0
FastNet	4	1	5	2	3	5	0
ISCO ISP Ltd	0	3	3	2	1	3	0
SIMBA Supermarket	0	4	4	1	3	4	0
BK Techouse	2	15	17	3	14	17	0
Mango Telecom Ltd	37	27	64	21	43	62	2
NET LINK LTD	0	9	9	3	6	9	0
CBNET Ltd	2	1	3	1	2	3	0
RTN	0	17	17	6	11	17	0
Smart Broadband Ltd	0	4	4	1	3	4	0
SUKU NSA LTD	0	3	3	1	2	3	0
NETPRO LTD	5	5	10	4	6	10	0
<b>Total</b>	<b>139</b>	<b>847</b>	<b>986</b>	<b>254</b>	<b>732</b>	<b>956</b>	<b>30</b>

Source: Operators' reports, September 2019

The two hundred fifty-four (254) staffs representing 26 percent of the total staffs are female whereas 74 percent are male as it is shown in the figure below.

**Figure 12: Staffs by gender as of September 2019**



**Source: Operators' reports, September 2019**

## 7. MEDIA AND BROADCASTING

The table below shows the number of licensed TV stations, FM Radio Broadcasters, newspapers, and signal distributors registered to operate in Rwanda during the third quarter of the year 2019.

**Table 16: Licensed media operators from September 2018 to September 2019**

Category	Sep-2018	Dec-2018	Mar-2019	Jun-2019	Sep-2019
Signal distributors	2	2	2	2	2
Pay TV operators	4	4	4	4	3
FM Radio stations	34	34	34	34	34
Television stations	13	13	14	21	18
Online media houses	23	23	23	23	23
Print media houses	28	28	30	30	30
International media house	3	3	3	3	3

**Source: RURA database**

During the quarter under review, there are two (2) licensed signal distributors, three (3) pay TV operators, thirty-four (34) FM radio stations, eighteen (18) television stations, twenty-three (23) online media houses, thirty (30) print media houses, and three (3) international media houses.

**Table 17: Number of Pay TV subscribers as of September 2019**

Name of Pay TV	Active Subscribers	Registered Subscribers
Azam Media Ltd	6,768	13,396
Star Africa Media Ltd	35,029	221,668
Tele 10 Ltd	16,560	26,481
Total	58,357	261,545

Source: Operators' reports, September 2019

The total number of active subscribers was 58,357 recorded in the third quarter of the year 2019 whereas registered subscribers were 261,545.

**Table 18: Trend of decoders sold from 3<sup>rd</sup> quarter 2018 to 3<sup>rd</sup> quarter 2019**

Number of Decoders Sold	Q3 2018	Q4 2018	Q1 2019	Q2 2019	Q3 2019
Azam Media Ltd	0	474	586	795	426
Star Africa Media Ltd	1,609	2,582	3,085	2,370	789
Tele 10 Ltd	574	583	730	373	389
Kwesé Support Services Rwanda Ltd	47	34	2	-	-
Total	2,230	3,673	4,403	3,538	1,604

Source: Operators' reports, September 2019

During this quarter under review, one thousand six hundred and four (1,604) decoders were sold by Pay TV operators and reached a total of nine thousand five hundred and forty-five (9,545) decoders sold in the nine (9) months of the year 2019.

**Table 19: Number of staffs employed in Pay TV operators as of September 2019**

Operator	Staffs per type of contract			Staffs per gender		Domestic and foreign staffs	
	Temporary	Permanent	Total	Female	Male	Domestic	Foreign
Azam Media Ltd	0	22	22	6	16	21	1
Star Africa Media Ltd	5	75	80	20	60	75	5
Tele 10 Ltd	0	29	29	9	20	29	0
Total	5	126	131	35	96	125	6

Source: Operators' reports, September 2019

The total number of staffs employed by Pay TV operators as of September 2019 was 131 of which 61.1% are employed by Star Africa Media Ltd, 22.1% by Tele 10 Ltd, and 16.8% are employed by Azam Media Ltd. The 35 staffs representing 26.7% of the total staffs are female.

## 8. POSTAL AND COURIER SERVICES

During the quarter under review, there were twenty-eight (28) postal and courier operators under different type of license namely public postal operator license, international courier license, regional courier license, domestic courier license, and intra-city courier license.

**Table 20: Licensed postal and courier operators as of September 2019**

SN	Name of licensee	Type of license
1	National Post Office	Public Postal operator License
2	Panorama Ltd	International Courier License
3	Target Today Delivery Ltd	International Courier License
4	ISCO Intersec Security	International Courier License
5	Eagle Net Ltd	International Courier License
6	Skynet Worldwide Express Ltd	International Courier License
7	Pan Africa Express Transport Ltd (Licensee Of Fedex)	International Courier License
8	DHL Express	International Courier License
9	Dove Forwarding And Supply Company Ltd	Regional courier License
10	Ukine Ltd	Regional Courier License
11	Shaft Ltd	Regional courier License
12	Modern Coast Express Uganda Ltd	Regional Courier License
13	Trinity Transporters And Distributors Company Ltd	Regional Courier License
14	Stella Express Ltd	Domestic courier License
15	SOTRA Tour & Travel Agency Ltd	Domestic courier License
16	Sofast Ltd	Domestic courier License
17	Horizontal Ltd	Domestic courier License
18	Kigali Coach Tours & Travel Ltd	Domestic courier License
19	Alpha Express Company Ltd	Domestic courier License
20	Excel Travel & Tours Agency Ltd	Domestic courier License
21	Kigali Safari Express	Domestic courier License
22	Omega Ltd	Domestic courier License
23	Virunga Courier Express Ltd	Domestic courier License
24	Matunda Express Ltd	Domestic courier License
25	Common Rock Ltd	Domestic courier License
26	Fast Rwanda Courier Ltd	Domestic courier License
27	International Express Ltd	Domestic courier License
28	I&T Investment & Supply Company Ltd	Intra-city courier License

Source: RURA database