



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

**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> October to 31<sup>st</sup> December 2020.

**Table 1: Key ICT indicators**

INDICATORS	Q3 2020	Q4 2020	% change between Q4 and Q3
<b>SUBSCRIPTIONS</b>			
Mobile subscriptions	10,505,867	10,614,408	1.03
Fixed subscriptions	11,660	11,671	0.09
Mobile (SIM) penetration rate (%)	82.96	83.82	1.03
Fixed telephone penetration rate (%)	0.0921	0.0922	0.09
<b>VOICE TRAFFIC IN MINUTES</b>			
On-Net Voice Traffic	6,570,447,660	6,140,862,875	-6.54
Outgoing Off-Net Voice Traffic	81,947,683	94,278,865	15.05
International Outgoing mobile voice traffic	11,033,937	8,572,312	-22.31
International Incoming mobile voice traffic	17,442,260	17,692,326	1.43
<b>ROAMING SUBSCRIBERS</b>			
Roaming-in (Foreign subscribers)	1,584,626	1,210,619	-23.60
Roaming-Out (Own subscribers)	833,800	824,422	-1.12
<b>ROAMING TRAFFIC</b>			
Total incoming minutes for roamers	43,931,710	42,449,587	-3.37
Total outgoing minutes for roamers	1,808,100	2,230,649	23.37
<b>SMS TRAFFIC</b>			
On-net SMS	983,382,935	863,335,064	-12.21
Outgoing Off-net SMS	6,605,105	4,484,361	-32.11
Outgoing International SMS	388,259	602,472	55.17
Incoming International SMS	363,532	408,740	12.44
<b>DATA/INTERNET</b>			
Internet subscriptions	7,919,387	7,995,325	0.96
Internet subscriptions per 100 inhabitants	62.5	63.1	0.96
Equipped international internet bandwidth (Mbps)	130,383	125,510	-3.74
Used international internet bandwidth (Mbps)	58,018	61,469	5.95
<b>MEDIA AND BROADCASTING</b>			
Number of Television stations	19	19	0.00
Number of Radio FM stations	35	29	-17.14
Active Pay TV subscribers	62,523	65,251	4.36
Registered Pay TV subscribers	304,643	320,198	5.11

Source: Operators' reports, December 2020

## 1. MOBILE TELEPHONE SERVICES

### 1.1. Mobile subscriptions

At the end of the year 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 December 2020 were 10.6 million SIM cards.

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

Name of operator	December 2020			September 2020			Quarterly Variation
	Postpaid	Prepaid	Total	Postpaid	Prepaid	Total	
MTN Rwanda Ltd	83,141	6,473,932	6,557,073	78,542	6,325,983	6,404,525	2.4%
Airtel Rwanda Ltd	4,725	4,052,610	4,057,335	4,361	4,096,981	4,101,342	-1.1%
<b>Total</b>	<b>87,866</b>	<b>10,526,542</b>	<b>10,614,408</b>	<b>82,903</b>	<b>10,422,964</b>	<b>10,505,867</b>	<b>1.0%</b>

Source: Operators' reports, December 2020

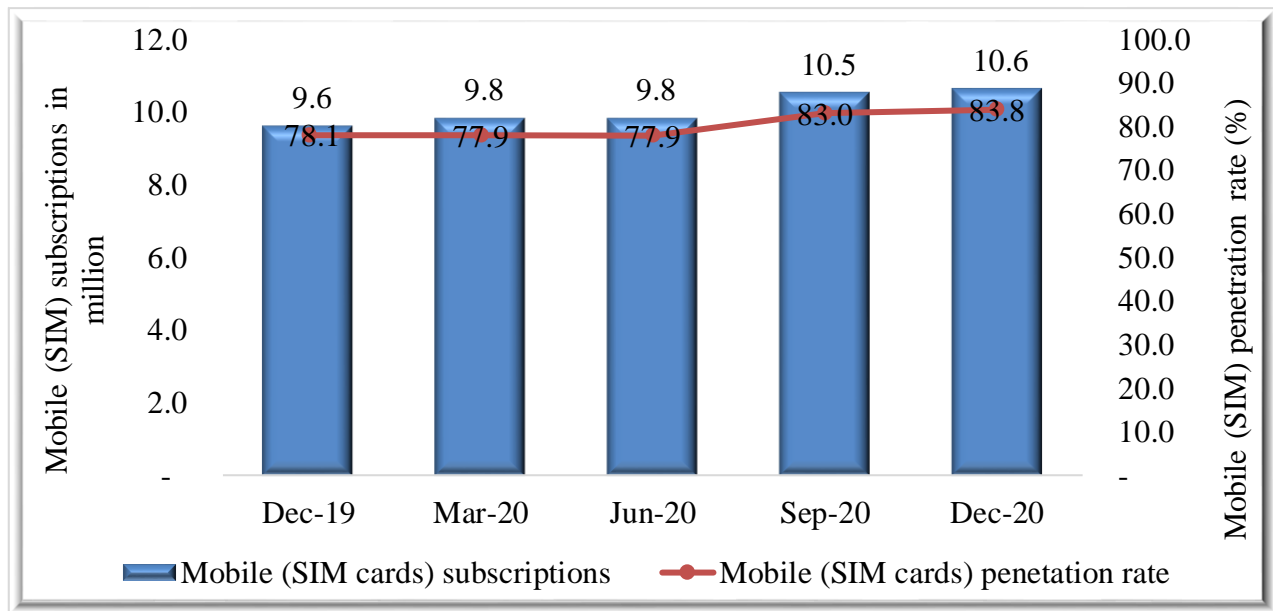
As of December 2020, the number of active mobile (SIM cards) subscriptions in the country increased to 10.6 million from 9.6 million reported at the end of December 2019. During this quarter under review, the active mobile-cellular telephone (SIM cards) subscriptions registered for every 100 people increased to 83.8% from 78.1% recorded at the end of the year 2019.

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 Q4 2019 to Q4 2020**

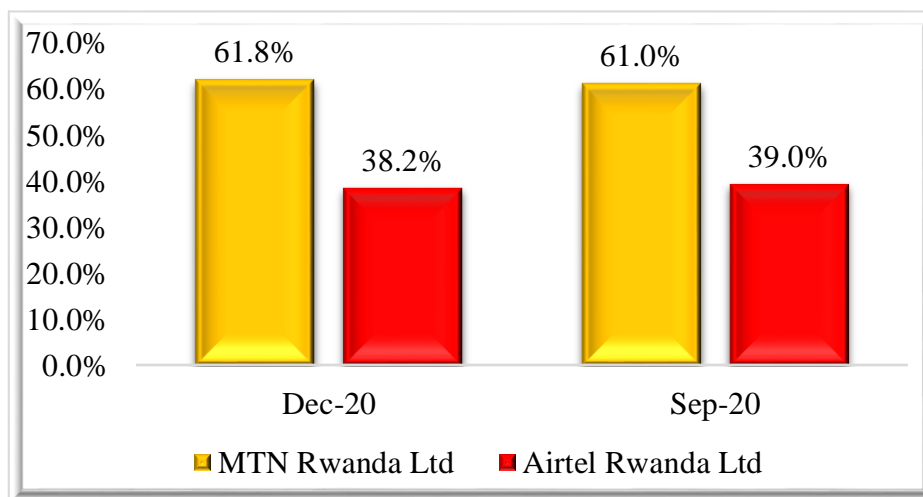


Source: Operators' reports, December 2020

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

At the end of the fourth quarter of 2020, the active mobile subscriptions market shares for MTN Rwanda Ltd increased by 0.8 percentage points up to 61.8 percent, whereas that for Airtel Rwanda Ltd dropped by the same margin reaching 38.2 percent compared to the previous quarter.

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



Source: Operators' reports, December 2020

<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, 80 Frw/Min in One Area Network Countries, and 50.5 Frw/Min to call in US, Canada, China, and India.

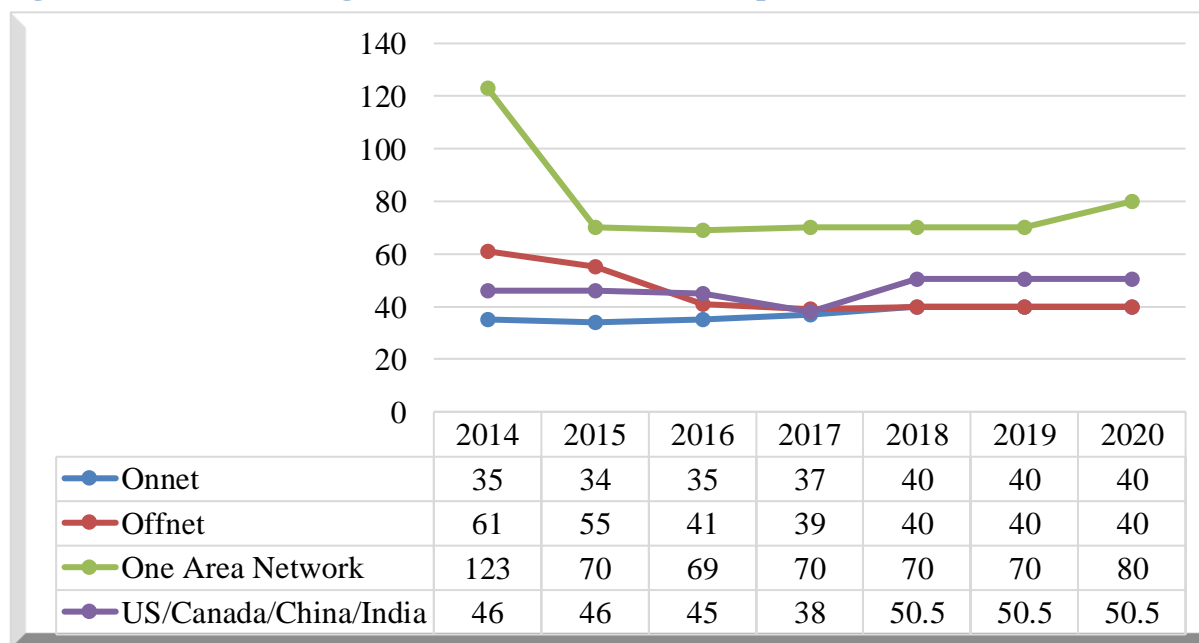
**Table 3: Mobile telephone voice tariff (in Frw) per minute per operator as of December 2020**

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Average
Onnet	45	35	40.0
Offnet	45	35	40.0
One Area Network	90	70	80.0
US/Canada/China/India	51	50	50.5

Source: Operators' reports, December 2020

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 remained unchanged since 2018 at 40 Frw/Min, 40 Frw/Min, and 50.5 Frw/Min respectively. The average voice tariff for calling in One Area Network Countries increased by 14.3% from 70 Frw/Min in 2019 to 80 Frw/Min at the end of the year 2020.

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



Source: Operators' reports, December 2020



As of the fourth quarter 2020, the average tariff for sending a message within a telecom operator was 8.5 Frw, whereas 20.5 Frw was between telecom operators, 35.5 Frw to Uganda and Kenya, 45.0 Frw to South Sudan, and 62.5 to Sudan. A subscriber on Airtel Rwanda’s network sends a short messaging text to India, Gabon, Nigeria, Tanzania, Ghana, Niger, and Malawi on 26 Frw whereas a subscriber on MTN Rwanda’s Network used 80 Frw per SMS. The average tariff for sending a message to other international countries was 79.5.

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

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Average
Onnet	12	5	8.5
Offnet	26	15	20.5
Uganda and Kenya	45	26	35.5
South Sudan	45	45	45.0
Sudan	80	45	62.5
International	80	79	79.5

Source: Operators’ reports, December 2020

## 1.4. Mobile traffic statistics

### 1.4.1. Mobile outgoing and incoming voice traffic

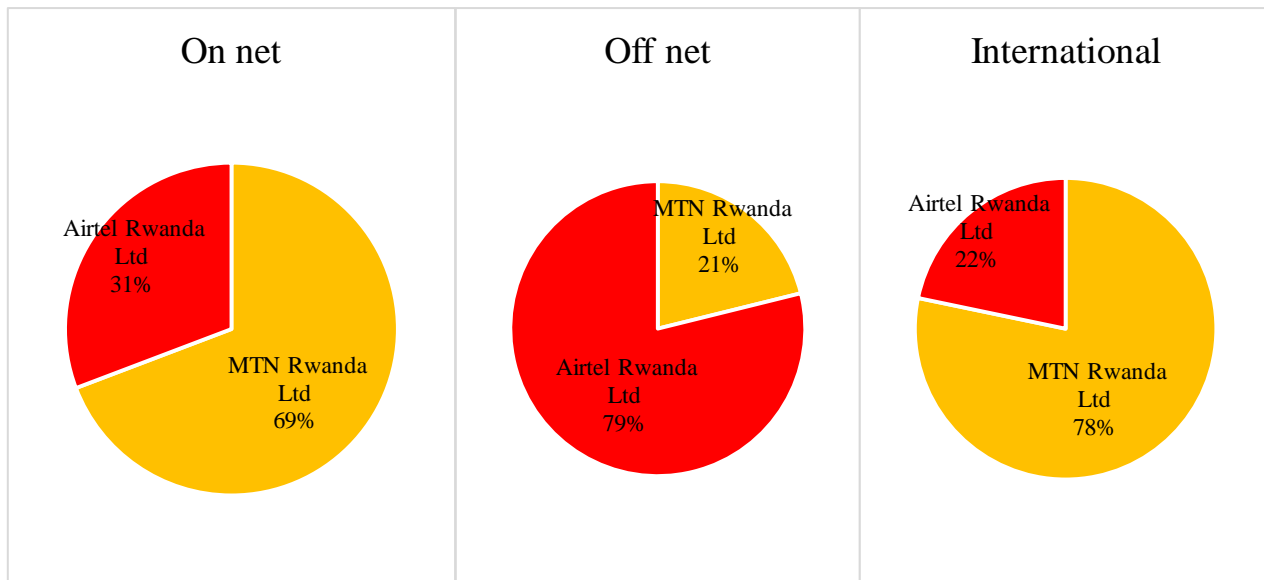
During the fourth quarter of the year 2020, the total volume of minutes originating within mobile networks was 6.1 billion minutes, the total minutes originating from one mobile networks to other networks was 93.9 million minutes, and the total minutes from mobile networks to international networks was 8.5 million minutes. The number of minutes from international networks to local mobile networks was 17.6 million minutes.

**Table 5: Outgoing and incoming traffic (in minutes) per operator as of the 4<sup>th</sup> quarter 2020**

Voice traffic	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Outgoing calls			
On net	4,249,357,059	1,888,869,073	6,138,226,133
Off net	19,864,759	74,111,670	93,976,429
International	6,662,213	1,849,733	8,511,946
Incoming calls			
International	8,472,067	9,205,722	17,677,789

Source: Operators’ reports, December 2020

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



Source: Operators’ reports, December 2020

During the fourth quarter 2020, the average minutes per call within mobile telecom networks was 2.2, average minutes per call to call other networks was 1.2 while the average minutes per call from Rwanda mobile networks to international networks was 2.4. Further, the average minutes per call from international networks to Rwanda mobile networks was 3.0.

**Table 6: Average minutes per call per operator in the 4<sup>th</sup> quarter 2020**

Voice traffic	MTN Rwanda Ltd	Airtel Rwanda Ltd	Combined
Outgoing calls			
On net	2.0	3.2	2.2
Off net	0.8	1.4	1.2
International	2.4	2.8	2.4
Incoming calls			
International	2.3	4.2	3.0

Source: Operators’ reports, December 2020

### 1.4.2. Outgoing and incoming SMS traffic

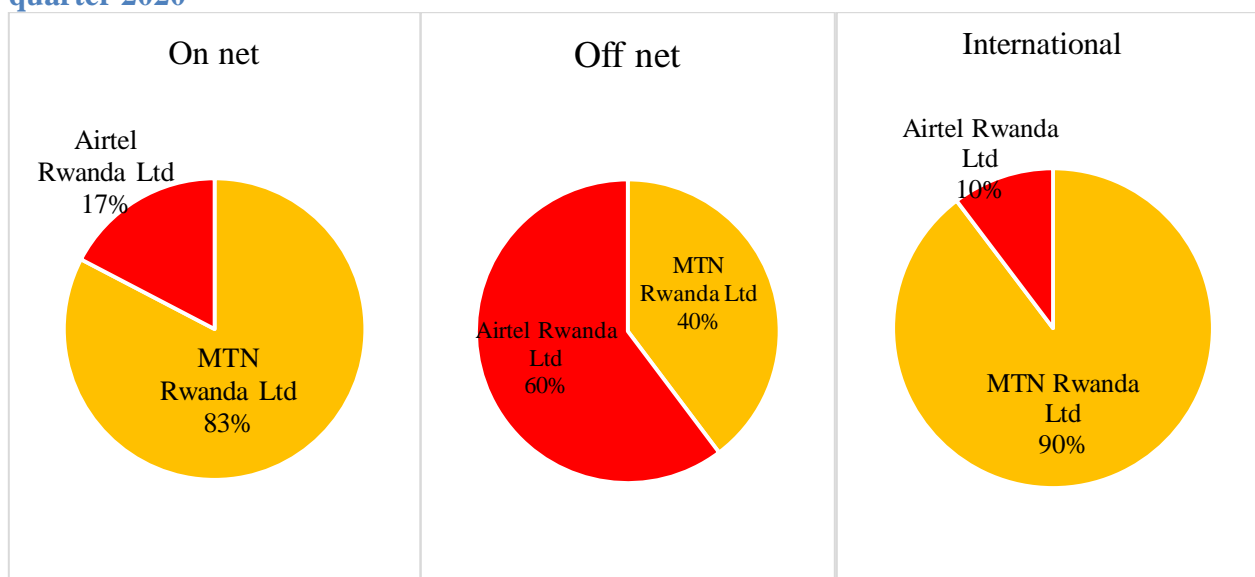
The total volume of SMS traffic originating within mobile networks was 863.3 million SMS, the total SMS traffic originating from mobile networks to other mobile networks was 4.4 million SMS and the total SMS traffic from mobile networks to international networks was 0.6 million SMS. The number of SMS from international networks to Rwanda was 0.4 million SMS.

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

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Outgoing SMS			
On net	713,617,291	149,717,773	863,335,064
Off net	1,781,583	2,702,778	4,484,361
International	540,376	62,096	602,472
Incoming SMS			
International	317,572	91,168	408,740

Source: Operators' reports, December 2020

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



Source: Operators' reports, December 2020

## 2. ROAMING

### 2.1. Roaming subscribers

The international roaming subscribers during the fourth quarter of the year 2020 stood at 1.2 million foreign subscribers roamed on local networks whereas 0.8 million Rwanda subscribers roamed on foreign networks.

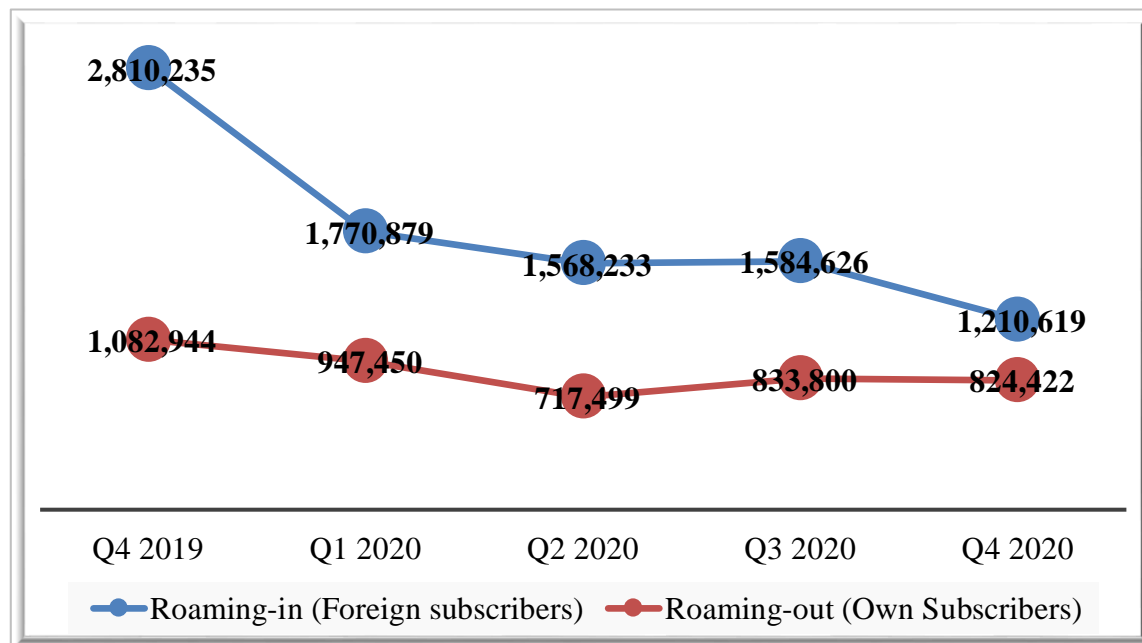
**Table 8: International roaming subscribers as of the fourth quarter 2020**

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Roaming-in (Foreign subscribers)	702,540	508,079	1,210,619
Roaming-out (Own Subscribers)	710,945	113,477	824,422

Source: Operators' reports, December 2020

During the fourth quarter 2020, the number of roamers-out decreased to 824,422 from 833,800 subscribers representing a decline of 1.1% and the number of roamers-in decreased to 1,210,619 from 1,584,626 subscribers recorded during the previous quarter, which is equivalent to 23.6 percent.

**Figure 6: Trend of roaming subscribers from Q4 2019 to Q4 2020**



Source: Operators' reports, December 2020

## 2.2. Roaming traffic

During the quarter under review, the total volume of outgoing traffic generated by foreign subscribers roaming in Rwanda was 0.9 million minutes whereas the total minutes generated by Rwanda mobile networks' subscribers roamed outside the country was 1.2 million minutes. On the other hand, the total incoming traffic on foreign subscribers roamed in Rwanda was 28.8 million minutes and the incoming minutes to Rwanda subscribers roamed on foreign networks was 13.6 million.

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

Destination	Foreign subscribers roaming on local networks			Own subscribers roaming on foreign networks		
	MTN	Airtel	Total	MTN	Airtel	Total
Outgoing	667,550	303,664	971,214	1,127,942	131,493	1,259,435
Incoming	7,667,655	11,154,022	28,821,677	12,489,277	1,138,633	13,627,910
<b>Total</b>	<b>18,335,205</b>	<b>11,457,686</b>	<b>29,792,891</b>	<b>13,617,220</b>	<b>1,270,126</b>	<b>14,887,346</b>

Source: Operators' reports, December 2020

## 3. FIXED TELEPHONE SERVICES

### 3.1. Fixed telephone subscriptions

At the end of fourth quarter 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.

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

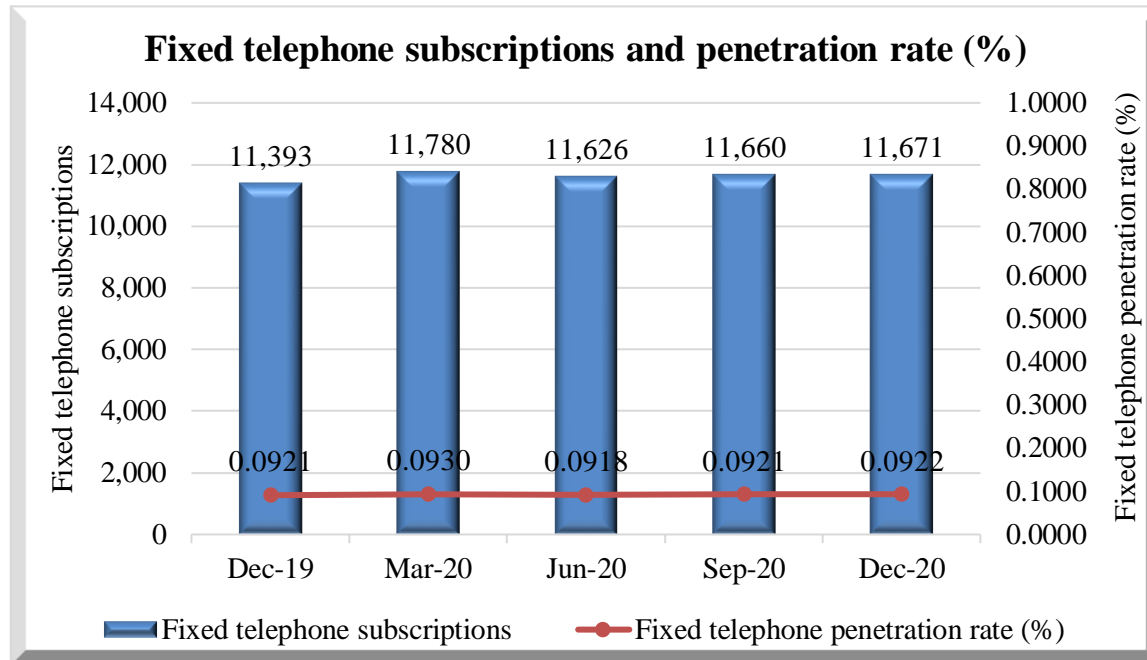
Name of Operator	Fixed telephone subscriptions	Fixed telephone penetration rate (%) <sup>3</sup>
MTN Rwanda Ltd	178	<b>0.0922</b>
Airtel Rwanda Ltd	9,490	
Liquid Telecom Ltd	743	
BSC Ltd	1,260	
<b>Total</b>	<b>11,671</b>	

Source: Operators' reports, December 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.

At the end of December 2020, the number of fixed telephone subscriptions increased up to 11,671 from 11,393 recorded as of the fourth quarter of 2019. As result, fixed telephone subscriptions per 100 people increased to 0.0922 percent from 0.0921 percent.

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

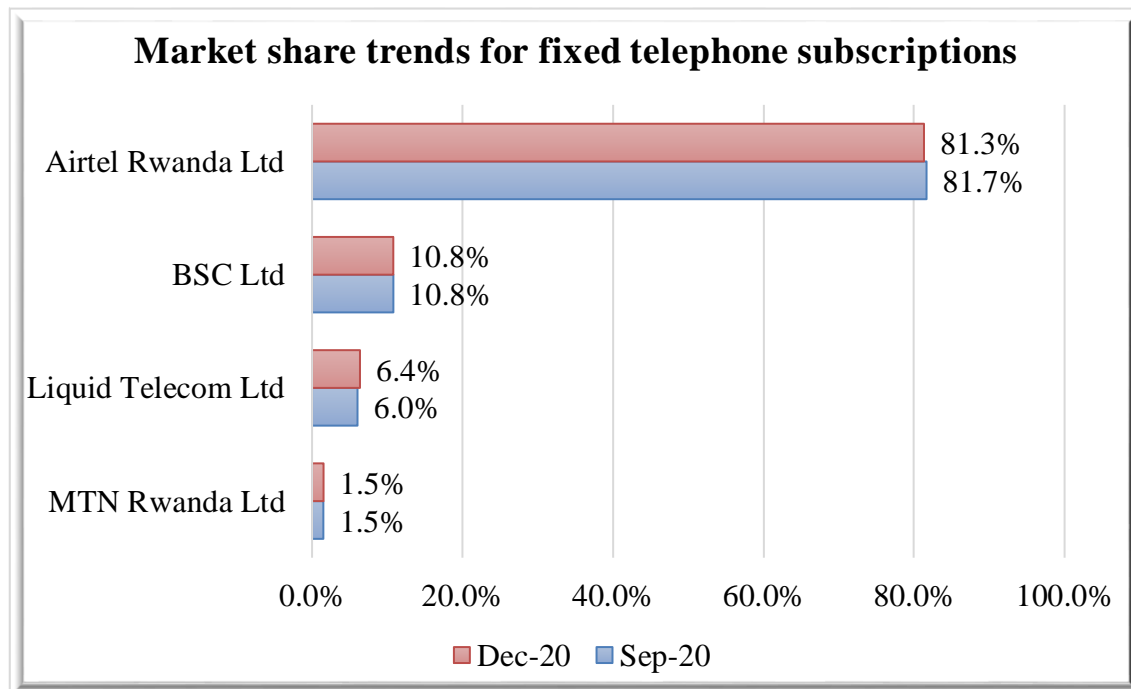


Source: Operators’ reports, December 2020

As of December 2020, the market shares in fixed telephone subscriptions for Airtel Rwanda Ltd decreased by 0.4 percentage points to stand at 81.3 percent, and that for Liquid Telecom Ltd increased by 0.4 percentage points up to 6.4 per cent from 6.0 per cent. The market shares for BSC Ltd and MTN Rwanda Ltd remained constant at 10.8 per cent and 1.5 per cent respectively.

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 Dec-2020**



Source: Operators' reports, December 2020

### 3.2. Fixed telephone traffic

During this quarter under review, the total volume of minutes originating within operators by fixed telephone lines was 2.6 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 0.6 thousand minutes. The number of minutes from international networks to local fixed telephone lines was 14,537 minutes.

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

Voice traffic	MTN Rwanda Ltd	Airtel Rwanda Ltd	Liquid Telecom Ltd	Total
<b>Outgoing calls</b>				
On net	2,484,431	140,696	11,615	<b>2,636,743</b>
Off net	47,370	10,140	244,926	<b>302,435</b>
International	35,193	386	24,787	<b>60,366</b>
<b>Incoming calls</b>				
International	14,171	-	366	<b>14,537</b>

Source: Operators' reports, December 2020

### 3.3. Fixed telephone service tariff

During the fourth quarter of the year 2020, the average tariff for calling by fixed telephone within telecom operator was 30 Frw, while calling across telecom operators was 36.7 Frw, and 189.4 Frw to call in One Area Network Countries.

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

Destination	Liquid Telecom Ltd	MTN Rwanda Ltd	Airtel Rwanda Ltd	Average
On net	10	45	35	<b>30.0</b>
Off net	30	45	35	<b>36.7</b>
ONA	408	90	70	<b>189.4</b>

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



## 4. INTERNET SERVICE PROVISION

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

At the end of the year 2020, there were 7,977,553 active SIM cards subscribed to the internet and 17,772 active fixed internet subscriptions. The table below shows the internet subscriptions per operator.

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

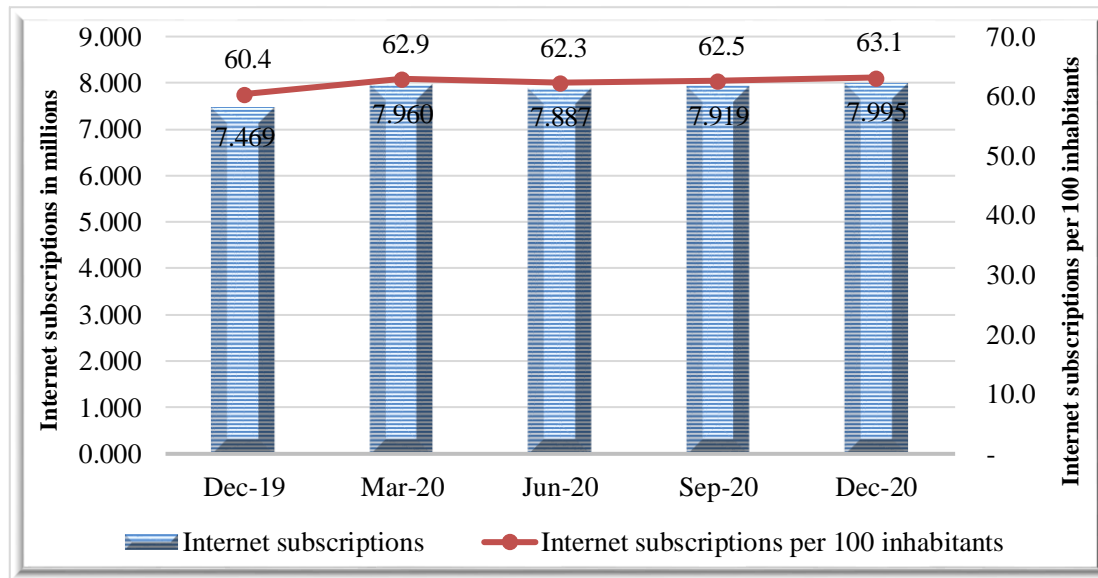
Name of operator	Fixed internet subscriptions		Mobile internet subscriptions			Total internet subscriptions
	Narrowband ( $\leq 256$ kbps)	Broadband ( $\geq 256$ kbps)	EDGE	3G	4G	
MTN Rwanda Ltd	87	2,387	3,551,950	963,279	598,840	5,116,543
Airtel Rwanda Ltd		1,548	1,996,674	740,985	5,037	2,744,244
Axiom Networks Ltd		145				145
4NetAfrica Ltd		4			27	31
BCS Ltd		9				9
BSC Ltd		3,019			13,347	16,366
Liquid Telecom Ltd		6,547				6,547
CBNET Ltd		5			612	617
G-MAX Ltd		15			581	596
ISCO ISP Ltd		21			2,835	2,856
NET LINK Ltd		1			509	510
Piramie INC		1			462	463
Simba Supermarket					208	208
Truconnect		29			1,070	1,099
BK Techouse		137			995	1,132
FASTNET		14			3,785	3,799
Mango Telecom Ltd		7			88,659	88,666
POPCONN Ltd		9			2,196	2,205
RTN Ltd					1,816	1,816
AC Group Ltd					356	356
Smart Broadband Ltd		1			370	371
TNSP		17			2,139	2,156
NETPRO Ltd					821	821
Revolution Air Ltd		125				125
GVA Rwanda		3,644				3,644
<b>Total</b>	<b>87</b>	<b>17,685</b>	<b>5,548,624</b>	<b>1,704,264</b>	<b>724,665</b>	<b>7,995,325</b>
<b>Penetration rate (%)</b>	<b>0.0</b>	<b>0.140</b>	<b>43.8</b>	<b>13.5</b>	<b>5.7</b>	<b>63.1</b>

Source: Operators' reports, December 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.

The total number of internet subscriptions increased by 7.0 per cent up to 7.995 million from 7.919 million recorded at the end of the fourth quarter of 2019 while there was an increase of 1.0 per cent between December 2020 and September 2020. At the end of December 2020, the internet subscriptions per 100 inhabitants was 63.1%.

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



Source: Operators’ reports, December 2020

At the end of December of the year 2020, the 99.5 percent of the fixed internet subscriptions are subscribed to the speed greater or equal to 256 kbps, whereas 0.5 percent of the total internet subscriptions are below 256 kbps.

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

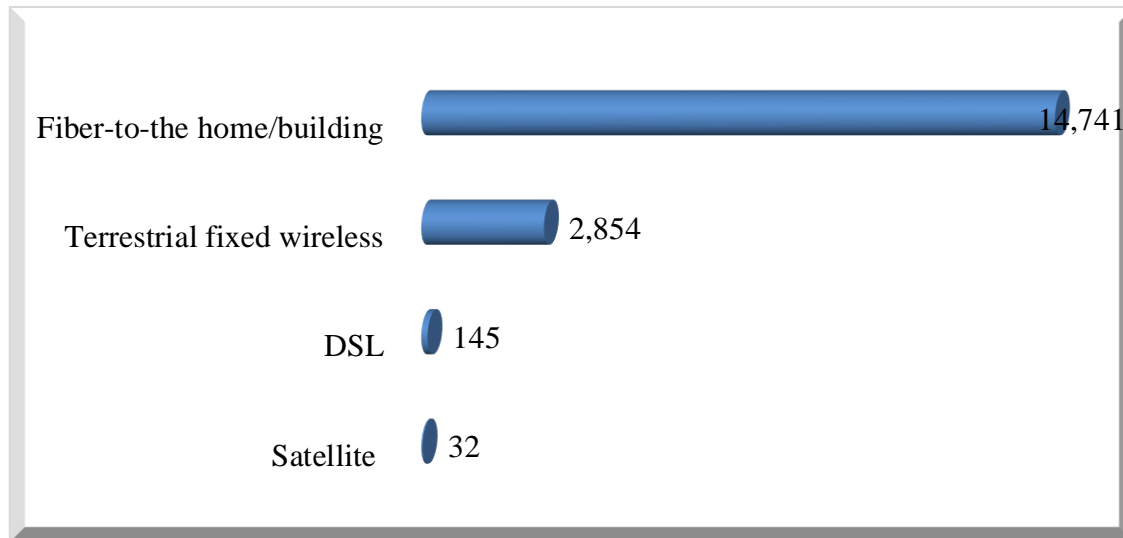
Speed	Fixed internet subscriptions	
	December 2020	September 2020
< 256 kbps	87	88
[256 kbps-2Mbps [	1,773	1,722
[2 Mbps -10 Mbps [	3,337	2,526
[10 Mbps-30Mbps [	9,633	7,903
[30 Mbps < 100Mbps [	2,789	2,169
≥ 100 Mbps	153	157
<b>Total</b>	<b>17,772</b>	<b>14,565</b>

Source: Operators’ reports, December 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.

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**

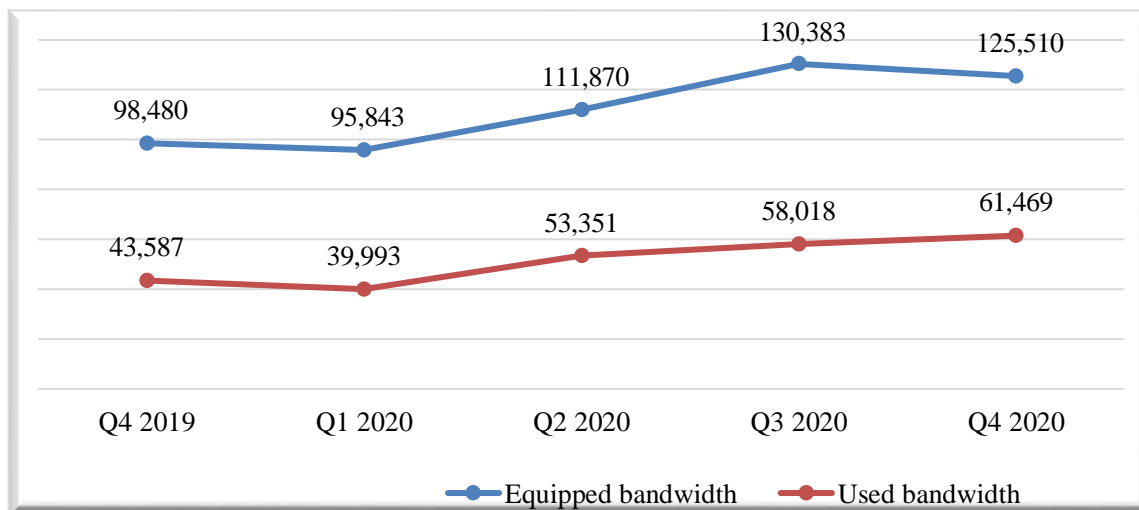


Source: Operators’ reports, December 2020

**4.2. International internet bandwidth**

During the quarter under reporting, the total equipped international internet bandwidth available in the country was 125,510 Mbps whereas the average used internet bandwidth was 61,469 Mbps.

**Figure 11: Trend of international internet bandwidth (Mbps) from Q4 2019 to Q4 2020**

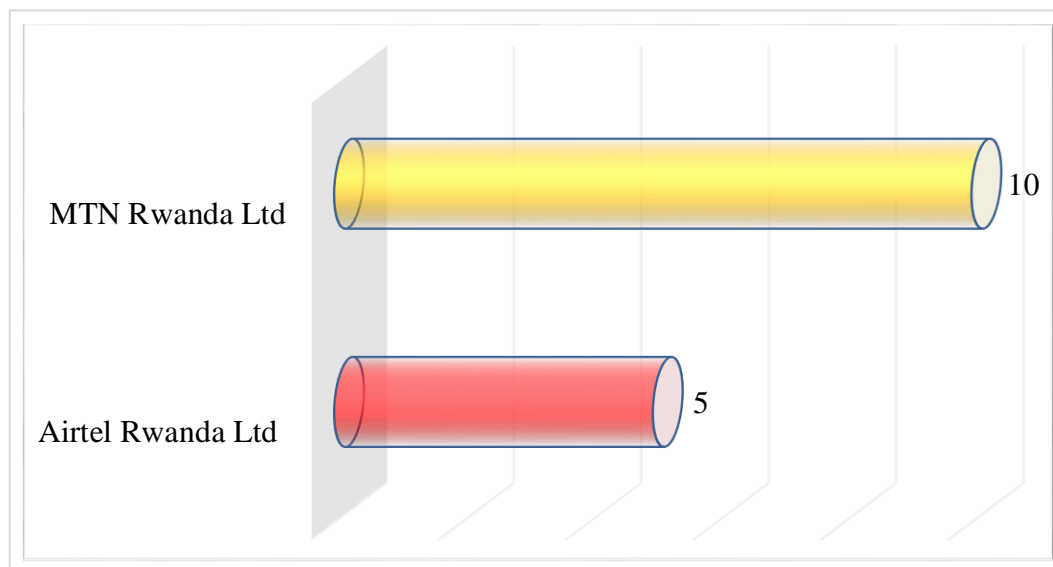


Source: Operators’ reports, December 2020

### 4.3. Mobile internet tariff

At the end of December 2020, 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 2020**



Source: Operators' reports, December 2020

## 5. TELECOMMUNICATION REVENUES AND INVESTMENT

**Table 15: Trend of quarterly revenues (Frw) from Q1 to Q4 2020**

Category	Q1 2020	Q2 2020	Q3 2020	Q4 2020
Total Revenues for MNOs and Liquid Telecom Ltd	43,209,193,088	44,860,787,018	55,865,808,070	53,148,500,338
Total revenues for ISPs and Wholesale Network Service Provider	7,864,369,646	10,132,162,379	9,708,752,820	9,347,116,675
<b>Total</b>	<b>51,073,562,735</b>	<b>54,992,949,398</b>	<b>65,574,560,889</b>	<b>62,495,617,014</b>

Source: Operators' reports, December 2020

**Table 16: Trend of additional investment (Frw) made in the fourth quarter 2020**

Category	Q1 2020	Q2 2020	Q3 2020	Q4 2020
Total investment for MNOs and Liquid Telecom Ltd	19,555,498,876	16,327,806,071	9,031,508,211	3,872,841,903
Total investment for ISPs and Wholesale Network Service Provider	3,435,833,387	1,185,266,915	2,157,953,517	770,344,137
<b>Total</b>	<b>22,991,332,263</b>	<b>17,513,072,986</b>	<b>11,189,461,727</b>	<b>4,643,186,039</b>

Source: Operators' reports, December 2020

## 6. EMPLOYMENT IN TELECOMMUNICATION SECTOR

One thousand one hundred and twenty-three (1,123) persons were employed in telecommunication sector at the end of December 2020; nine hundred and ninety (990) are permanent staff while one hundred thirty-three (133) are temporary staff. There were also five hundred and fifty-two (552) outsourced staff employed by telecommunication sector. The table below illustrates the number of employed persons by operator.

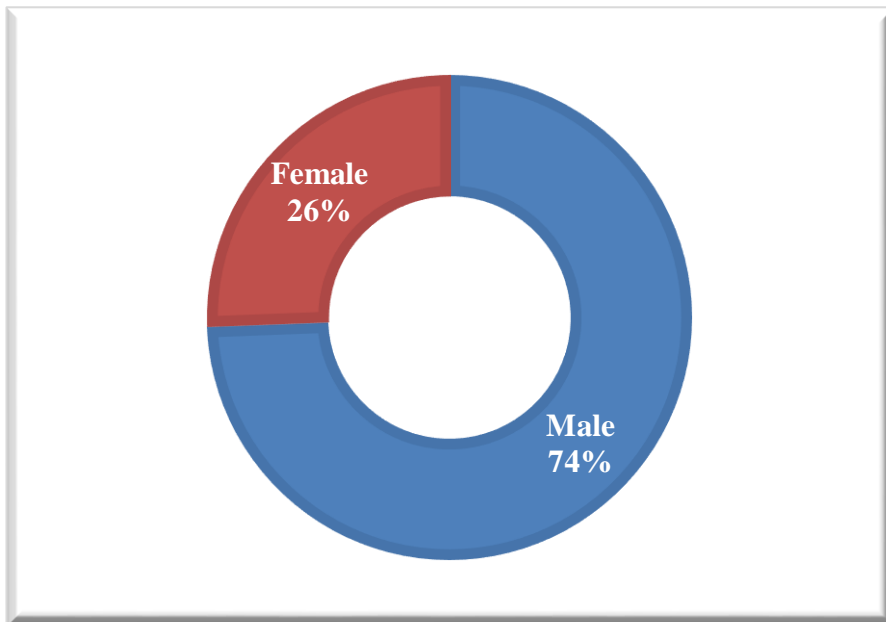
**Table 17: Number of staff employed in telecommunication sectors as of December 2020**

Operator	Type of contract			Gender		Domestic and foreign employees		Outsourced staff
	Temporary	Permanent	Total	Female	Male	Domestic	Foreign	
MTN Rwanda Ltd	7	272	279	85	194	271	8	251
Airtel Rwanda Ltd	0	135	135	17	118	128	7	232
Liquid Telecom Ltd	73	56	129	24	105	125	4	0
G-MAX	2	6	8	3	5	8	0	0
Truconnect	3	5	8	3	5	8	0	0
Axiom Networks Ltd	1	26	27	9	18	24	3	0
4NetAfrica Ltd	0	1	1	0	1	1	0	0
TNSP	18	8	26	5	21	26	0	2
KTRN Ltd	3	114	117	27	90	114	3	3
Piramie INC	0	5	5	4	1	2	3	3
POPCONN Ltd	0	14	14	4	10	13	1	0
BSC Ltd	16	60	76	19	57	76	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	145	145	54	91	143	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	26	26	7	19	26	0	0
Smart Broadband Ltd	2	4	6	4	2	6	0	0
SUKU NSA LTD	0	0	0	0	0	0	0	0
NETPRO LTD	0	5	5	2	3	5	0	0
Revolution Air Ltd	0	11	11	3	8	11	0	0
GVA Rwanda	0	24	24	4	20	23	1	59
<b>Total</b>	<b>133</b>	<b>990</b>	<b>1,123</b>	<b>295</b>	<b>828</b>	<b>1,090</b>	<b>33</b>	<b>552</b>

Source: Operators' reports, December 2020

The two hundred ninety-five (295) staff representing 26 percent of the total staff are female whereas 74 percent are male as shown in the figure below. The three hundred and four persons (328) representing 59 per cent of the total outsourced staff are female.

**Figure 13: Telecom staff by gender as of December 2020**



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

## 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 fourth quarter of the year 2020.

### 7.1. Licensed media operators

During the quarter under review, there was one (1) licensed signal distributors, four (4) pay TV operators, twenty-nine (29) 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 18: Trends of Licensed media operators from December 2019 to December 2020**

Category	Dec-2019	Mar-2020	Jun-2020	Sep-2020	Dec-2020
Signal distributors	2	2	2	2	1
Pay TV operators	3	3	3	3	4
FM Radio stations	33	34	34	35	29
Television stations	18	18	19	19	19
Online media houses	23	23	23	23	23
Print media houses	30	31	31	31	31
International media house	3	3	3	3	3

Source: RURA database

### 7.2. Pay TV subscriptions

The total number of registered subscribers at the end of the fourth quarter of the year 2020 was 320,198 whereas active subscribers were 65,251.

**Table 19: Number of Pay TV subscribers as of December 2020**

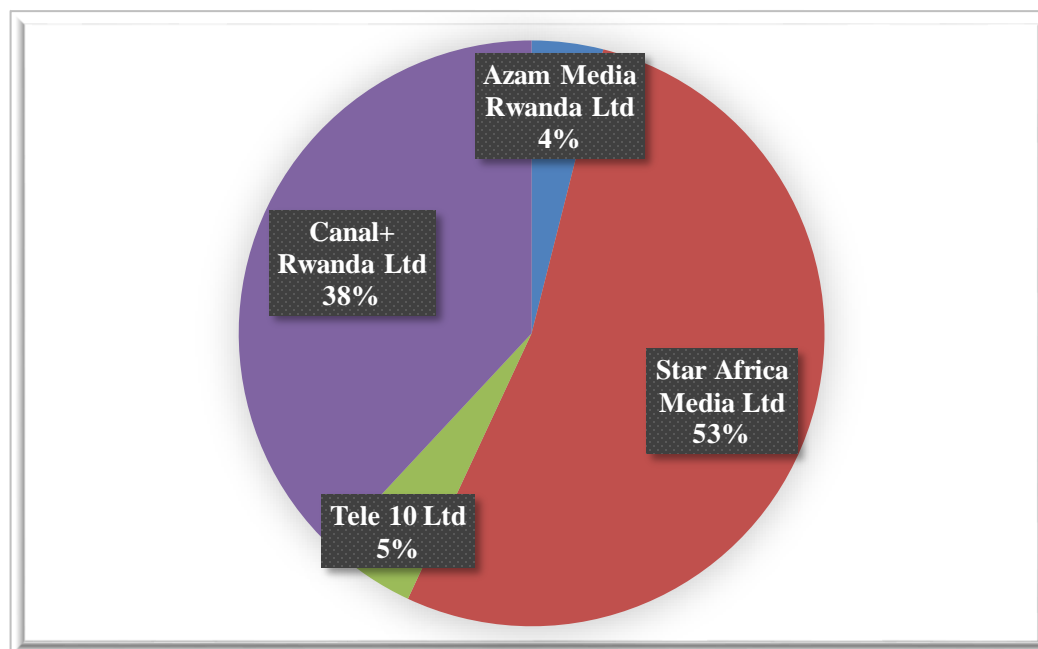
Name of Pay TV	Registered subscribers	Active <sup>6</sup> subscribers
Azam Media Rwanda Ltd	14,065	2,571
Star Africa Media Ltd	262,146	34,582
Tele 10 Ltd	4,458	3,260
Canal+ Rwanda Ltd	39,529	24,838
<b>Total</b>	<b>320,198</b>	<b>65,251</b>

Source: Operators' reports, December 2020

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

As of December 2020, the market shares for Star Africa Media Ltd in active Pay TV subscriptions was 53%, 38% for Canal + Rwanda Ltd, 5% for Azam Media Rwanda Ltd, and 4% for Tele 10 Ltd.

**Figure 14: Market share for Pay TV active subscribers per operator as of December 2020**



### 7.3. Decoders sold

During the fourth quarter of 2020, the number of decoders sold by Pay TV operators increased to nine thousand four hundred and forty-nine (9,449) from five thousand three hundred and sixty-two (5,362) recorded in the previous quarter.

**Table 20: Trend of decoders sold from 4<sup>th</sup> quarter 2019 to 4<sup>th</sup> quarter of 2020**

Number of Decoders Sold	Q4 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020
Azam Media Rwanda Ltd	118	117	98	110	76
Star Africa Media Ltd	4,205	5,618	3,193	4,983	3,687
Tele 10 Ltd	498	365	444	269	382
Canal+ Rwanda Ltd	-	-	-	-	5,304
<b>Total</b>	<b>4,821</b>	<b>6,100</b>	<b>3,735</b>	<b>5,362</b>	<b>9,449</b>

Source: Operators' reports, December 2020



#### 7.4. Pay TV staff

The total number of staff employed by Pay TV operators as of December 2020 was 144 of which 63.9% are employed by Star Africa Media Ltd, 18.8% by Canal+ Rwanda Ltd, 10.4% by Tele 10 Ltd, and 6.9% are employed by Azam Media Rwanda Ltd. The forty-five (45) staff representing 31.3% of the total staff are female.

**Table 21: Number of staff employed in Pay TV operators as of December 2020**

Operator	Staff per type of contract			Staff per gender		Origin	
	Temporary	Permanent	Total	Female	Male	Domestic	Foreign
Azam Media Rwanda Ltd	0	10	10	2	8	9	1
Star Africa Media Ltd	3	89	92	24	68	85	7
Tele 10 Ltd	0	15	15	6	9	15	0
Canal+ Rwanda Ltd	0	27	27	13	14	25	2
<b>Total</b>	<b>3</b>	<b>141</b>	<b>144</b>	<b>45</b>	<b>99</b>	<b>134</b>	<b>10</b>

Source: Operators' reports, December 2020