



**STATISTICS REPORT FOR TELECOM, MEDIA
AND BROADCASTING SECTOR AS OF THE
FOURTH QUARTER OF THE YEAR 2019**

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), and Pay TV operators as per their license obligations for the period from 1st October to 31st December 2019.

Table 1: Key ICT indicators

INDICATORS	Q3 2019	Q4 2019	% change Q3 to Q4
SUBSCRIPTIONS			
Mobile (SIM cards) subscriptions	9,390,913	9,658,548	2.8
Fixed telephone subscriptions	10,190	11,393	11.8
PENETRATION RATE (%)			
Mobile (SIM Cards) penetration rate	77.7	78.1	0.5
Fixed telephone penetration rate	0.084	0.092	9.2
VOICE TRAFFIC IN MINUTES			
On-Net Voice Traffic	4,048,238,422	4,428,947,876	9.4
Outgoing Off-Net Voice Traffic	33,365,751	43,918,719	31.6
International Outgoing mobile voice traffic	9,972,792	29,536,412	196.2
International Incoming mobile voice traffic	31,175,398	30,070,495	-3.5
ROAMING SUBSCRIBERS			
Roaming-in (Foreign subscribers)	2,363,191	2,810,235	18.9
Roaming-Out (Own subscribers)	1,016,544	1,082,944	6.5
SMS TRAFFIC			
Outgoing SMS On-net	619,133,127	858,027,366	38.6
Outgoing SMS Off-net	6,327,595	5,757,514	-9.0
Incoming International SMS	794,489	1,573,774	98.1
Outgoing International SMS	359,034	654,855	82.4
DATA/INTERNET			
Internet subscriptions	7,046,527	7,469,233	6.0
Internet subscriptions per 100 inhabitants	58.3	60.4	3.6
Equipped international internet bandwidth (Mbps)	87,154	98,480	13.0
BROADCASTING			
Number of Television stations	18	18	0.0
Number of Radio FM stations	34	33	-2.9
Active Pay TV subscribers	58,357	56,924	-2.5
Registered Pay TV subscribers	261,545	267,516	2.3

Source: Operators' reports, December 2019

1. MOBILE TELEPHONE SERVICES

1.1. Mobile subscriptions

As of December 2019, 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 the year 2019 were 9.6 million SIM cards.

Table 2: Comparison of active¹ mobile subscriptions per operator by contract type

Name of operator	Dec-19			Sep-19			Quarterly Variation
	Postpaid	Prepaid	Total	Postpaid	Prepaid	Total	
MTN Rwanda Ltd	62,972	5,309,427	5,372,399	61,895	5,035,697	5,097,592	5.4%
Airtel Rwanda Ltd	3,134	4,283,015	4,286,149	3,115	4,290,206	4,293,321	-0.2%
Total	66,106	9,592,442	9,658,548	65,010	9,325,903	9,390,913	2.8%

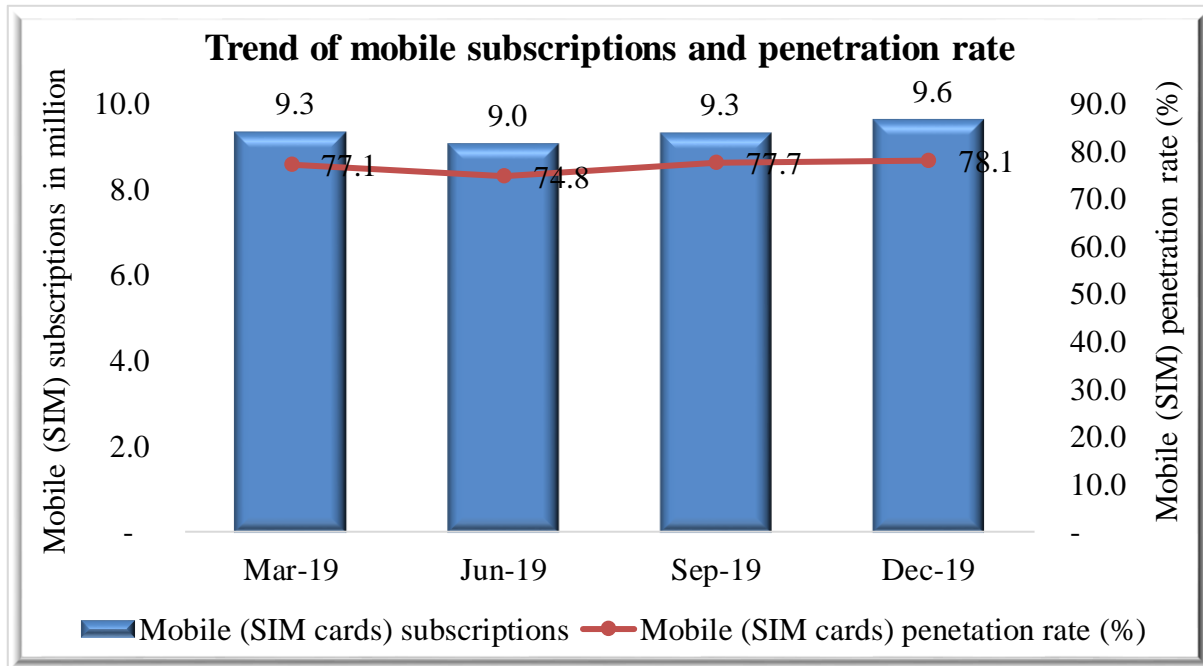
Source: Operators' reports, December 2019

Figure 1: Trend of mobile subscriptions and penetration rate for the year 2019

As of December 2019, the number of active mobile (SIM cards) subscriptions in the country increased up to 9.6 million from 9.3 million reported at the end of September 2019. During this period under review, the mobile (SIM cards) penetration rate² increased to 78.1 percent from 77.7 percent recorded in the third quarter of 2019.

¹ Active subscriptions refer to the number of SIM cards that have generated revenues to the operator within the last 90 days.

² 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.

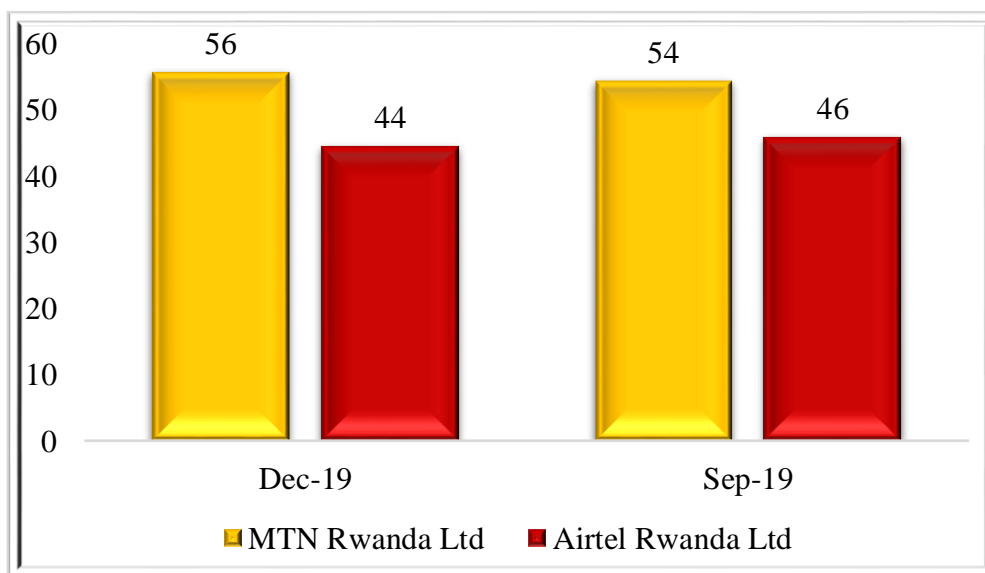


Source: Operators’ reports, December 2019

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 2 percentage points up to 56 per cent, whereas that for Airtel Rwanda Ltd declined by the same margin to stand at 44 per cent.

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



Source: Operators’ reports, December 2019

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 40 Frw was between telecom operators, 70 Frw for One Area Network, and 51 Frw to call in US, Canada, China, and India.

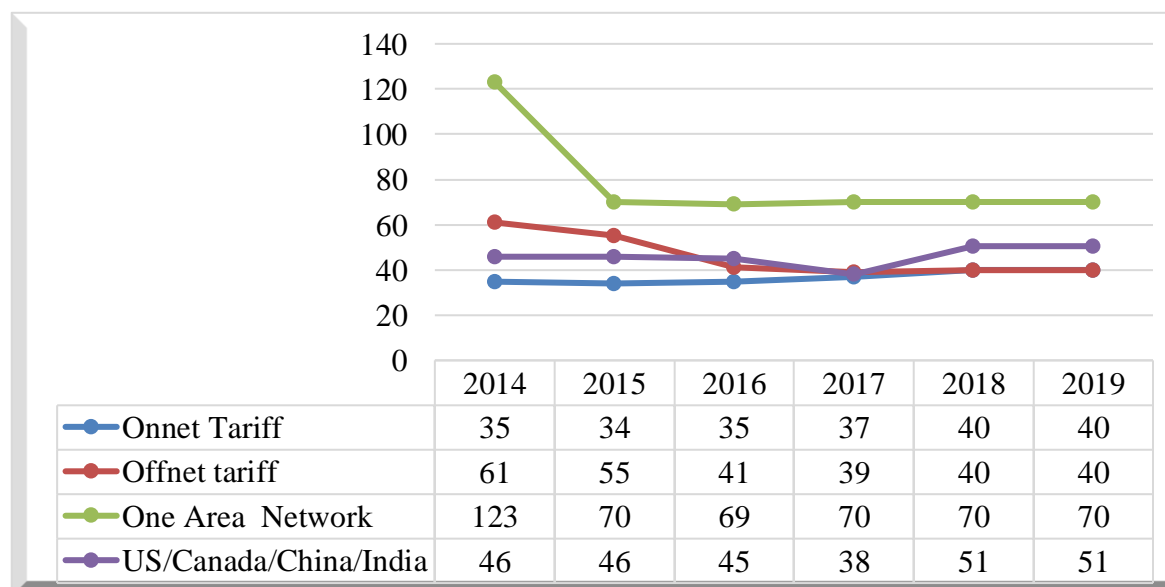
Table 3: Mobile telephone voice tariff (in Frw) per minute per operator as of December 2019

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, December 2019

Figure 3: Trend of average mobile voice tariff (in Frw) per minute from 2014 to 2019

The voice tariff for mobile networks remained unchanged during 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 51 Frw to call in US, Canada, China, and India.



Source: Operators' reports, December 2019

Table 4: SMS tariff structure (in Frw) as of December 2019

During this period under review, the average tariff for sending a message by mobile phone within a telecom operator was 14 Frw, whereas 21 Frw was between telecom operators, 36 Frw to Uganda and Kenya, 45 Frw to South Sudan, and 78 Frw to other international countries.

SMS Tariff	MTN Rwanda Ltd	Airtel Rwanda Ltd	Average
Onnet tariff	12	15	14
Offnet tariff	26	15	21
South Sudan	45	45	45
Uganda and Kenya	45	26	36
International	80	79	80

Source: Operators' reports, December 2019

1.4. Mobile traffic statistics

1.4.1. Mobile outgoing and incoming voice traffic

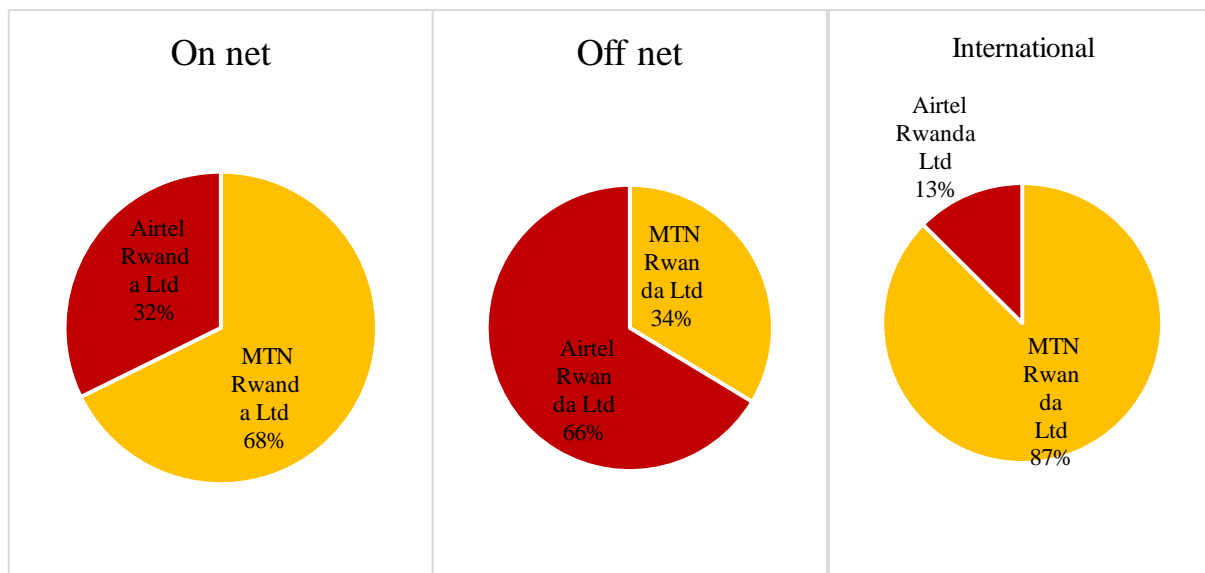
Table 5: Outgoing and incoming traffic (in minutes) per operator as of the 4th quarter 2019

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Outgoing calls			
On net	2,999,029,413	1,429,918,463	4,428,947,876
Off net	14,775,333	29,143,386	43,918,719
International	25,825,578	3,710,834	29,536,412
Incoming calls			
International	23,204,535	6,865,960	30,070,495

Source: Operators' reports, December 2019

During this quarter under review, the total volume of minutes originating within mobile networks was 4.4 billion minutes, the total minutes originating from one mobile networks to other mobile networks was 43.9 million, and the total minutes from mobile networks to international networks was 29.5 million. The number of minutes from international networks to mobile networks was 30.0 million.

Figure 4: Outgoing on net, off net and international voice traffic market share as of the fourth quarter 2019



Source: Operators’ reports, December 2019

Table 6: Average minutes per call per operator in the 4th quarter 2019

During the fourth quarter 2019, the average minutes per call within mobile telecom networks was 2.1, average minutes per call to other mobile networks was 0.9 and the average minutes per call from mobile networks to international networks was 3.4. The average minutes from international calls to Rwandan mobile networks was 3.2.

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Outgoing calls			
On net	1.9	2.5	2.1
Off net	0.7	1.0	0.9
International	3.9	1.8	3.4
Incoming calls			
International	3.1	3.5	3.2

Source: Operators’ reports, December 2019

1.4.2. Mobile and fixed telephone traffic

During this quarter under review, the total volume of minutes originating from mobile to fixed telephone was 0.9 million and the total minutes originating from fixed to mobile telephones reaches 0.4 million.

Table 7: Outgoing mobile and fixed telephone incoming traffic

Voice traffic	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Outgoing calls			
Mobile to fixed	923,408	2,542	925,950
Incoming calls			
Fixed to Mobile	440,560	23,778	464,338

Source: Operators' reports, December 2019

1.4.3. Outgoing and incoming SMS traffic

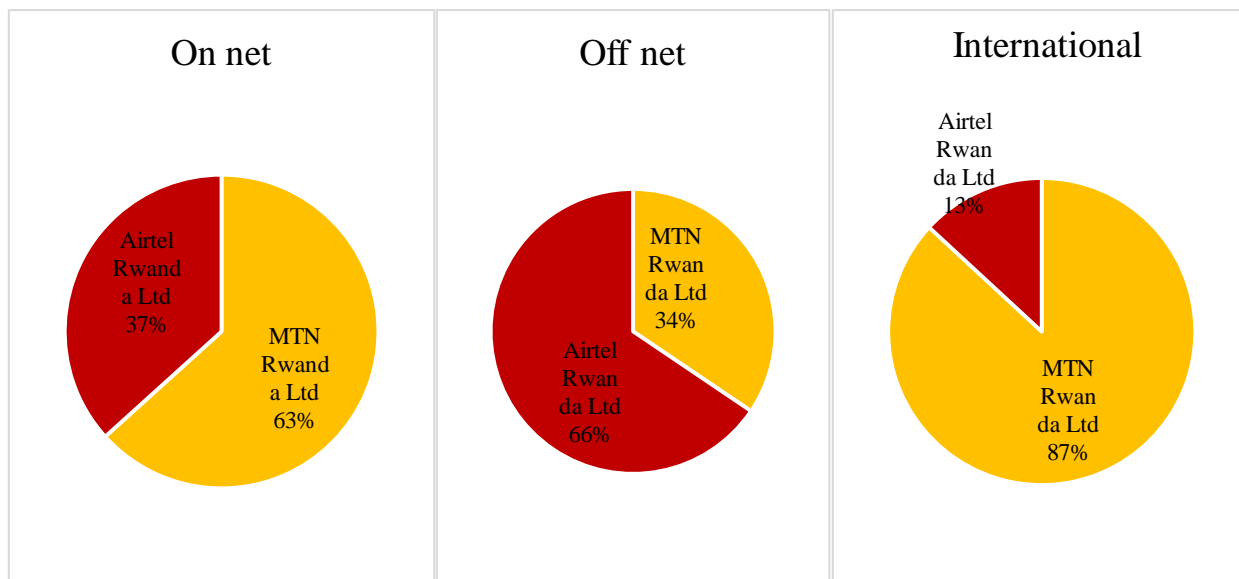
The total volume of SMS traffic originating within one mobile networks was 858.0 million SMS, the total SMS traffic originating from own mobile networks to other mobile networks was 5.7 million and the total SMS traffic from mobile networks to international networks was 0.6 million. The number of SMS from international networks to Rwanda was 1.5 million.

Table 8: SMS traffic (in numbers) as of the fourth quarter 2019

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Outgoing SMS			
On net	543,173,493	314,853,873	858,027,366
Off net	1,983,689	3,773,825	5,757,514
International	568,949	85,906	654,855
Incoming SMS			
International	391,438	1,182,336	1,573,774

Source: Operators' reports, December 2019

Figure 5: Outgoing on net, off net and international SMS traffic market share as of the fourth quarter 2019



Source: Operators’ reports, December 2019

2. ROAMING

2.1. Roaming subscribers

The international roaming subscribers during the fourth quarter of the year 2019 stood at 2.8 million foreign subscribers roamed on local networks whereas 1.0 million local subscribers roamed on foreign networks.

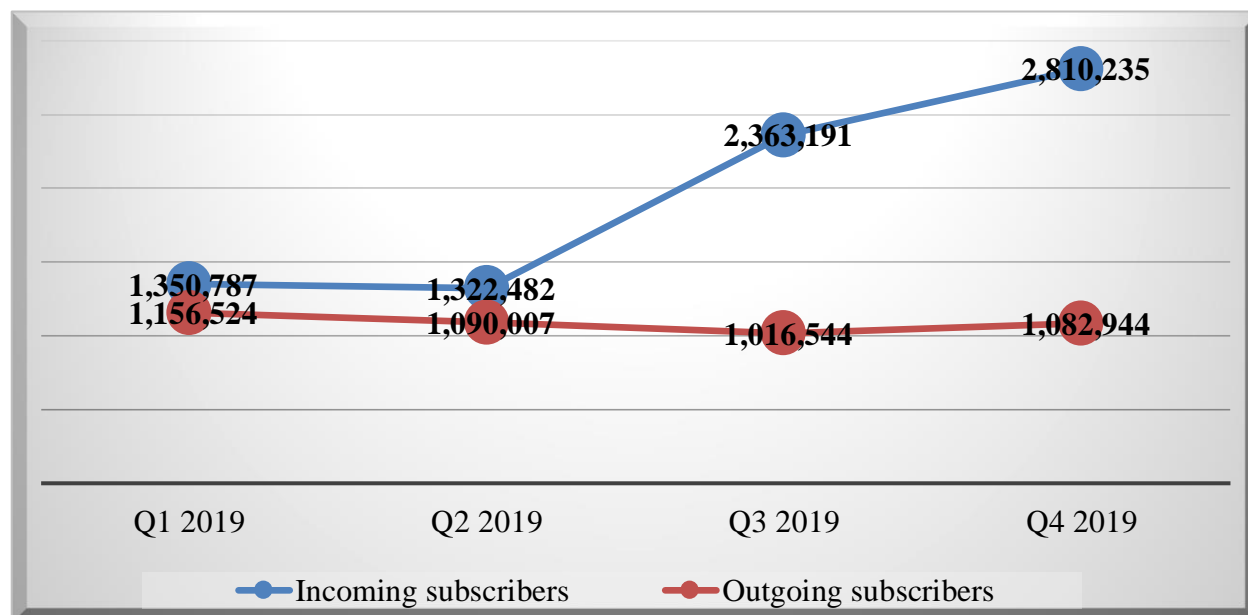
Table 9: International roaming subscribers as of December 2019

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Roaming-in (Foreign subscribers)	1,307,982	1,502,253	2,810,235
Roaming-out (Own Subscribers)	732,174	350,770	1,082,944

Source: Operators’ reports, December 2019

Figure 6: Trend of roaming subscribers from January to December 2019

The number of roamers-out increased to 1,082,944 from 1,016,544 subscribers whereas the number of roamers-in increased by 18.9 percent to 2,810,235 from 2,363,191 subscribers recorded during the previous quarter.



Source: Operators' reports, December 2019

2.2. Roaming traffic

During the quarter under review, the total volume of outgoing traffic generated by foreign subscribers roaming in Rwanda was 1.2 million minutes whereas the total minutes generated by Rwanda mobile networks' subscribers roamed outside the country was 1.7 million. The total incoming traffic on foreign subscribers was 24.3 million minutes and 22.5 million minutes for local subscribers roamed on foreign networks.

Table 10: Outgoing and incoming roaming traffic (in minutes) per operator as of the 4th quarter 2019

Destination	Own subscribers roaming on foreign networks			Foreign subscribers roaming on local networks		
	MTN	Airtel	Total	MTN	Airtel	Total
Incoming	19,323,814	3,017,385	22,341,199	23,526,161	866,643	24,392,804
Outgoing	1,132,835	660,764	1,793,599	1,175,793	85,055	1,260,848
Total	20,456,649	3,678,149	24,134,798	24,701,954	951,698	25,653,652

Source: Operators' reports, December 2019

3. FIXED TELEPHONE SERVICES

3.1. Fixed telephone subscriptions

As of December 2019, 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 penetration rate was 0.092 percent.

Table 11: Fixed telephone subscriptions as of December 2019

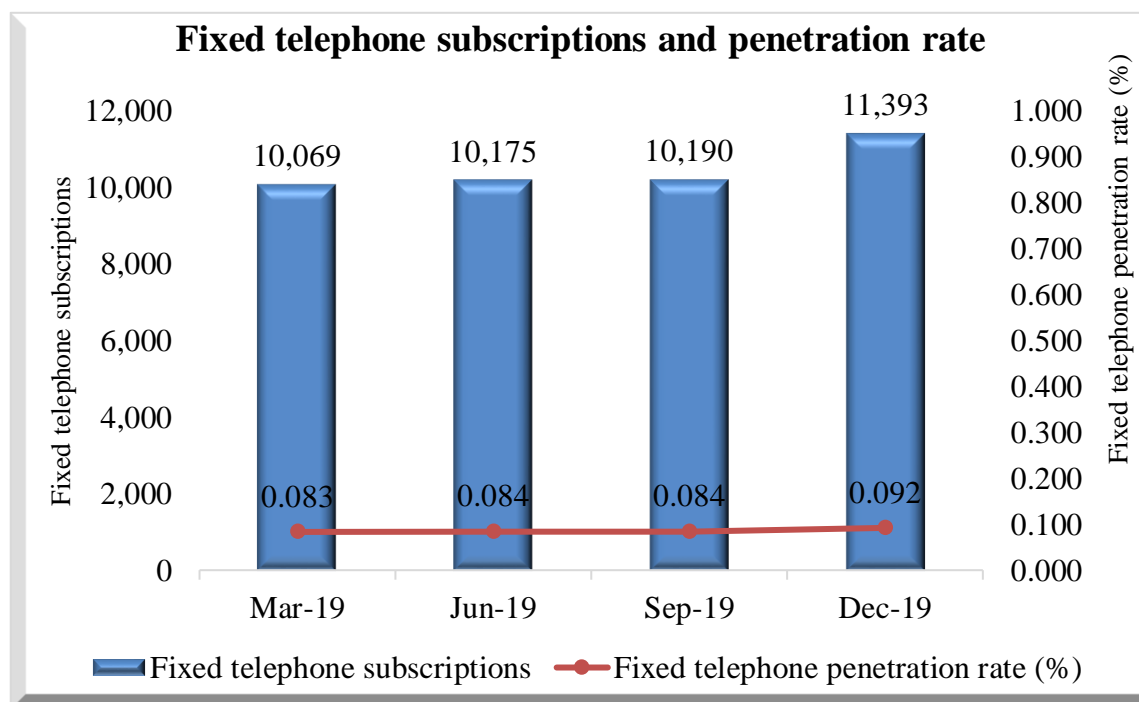
Name of Operator	Fixed telephone subscriptions	Fixed telephone penetration rate (%) ³
MTN Rwanda Ltd	138	0.092
Airtel Rwanda Ltd	9,521	
Liquid Telecom Ltd	924	
BSC Ltd	810	
Total	11,393	

Source: Operators' reports, December 2019

Figure 7: Trend of fixed telephone subscriptions and penetration rate for the year 2019

The number of fixed telephone subscriptions increased to 11,393 at the end of December 2019 from 10,190 recorded as of the third quarter of 2019. As result, fixed telephone penetration rate was 0.092 percent.

³ 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.



Source: Operators' reports, December 2019

3.2. Fixed telephone service tariff

During the year 2019, the average tariff for calling by fixed telephone within a telecom operator was 33 Frw, 47 Frw between telecom operators, and 92 Frw to call in One Area Network Countries.

Table 12: Fixed telephone service tariff structure (in Frw) per minute as of December 2019

Destination	Liquid Rwanda Ltd	MTN Rwanda Ltd	Airtel Rwanda Ltd	Average
On net	20	45	35	33
Off net	60	45	35	47
One Area Network	135	70	70	92

Source: Operators' reports, December 2019

4. INTERNET SERVICE PROVISION

4.1. Internet subscriptions

The total internet subscriptions stood at 7.4 million recorded at the end of the fourth quarter of the year 2019. The table below displays the internet subscriptions per operator.

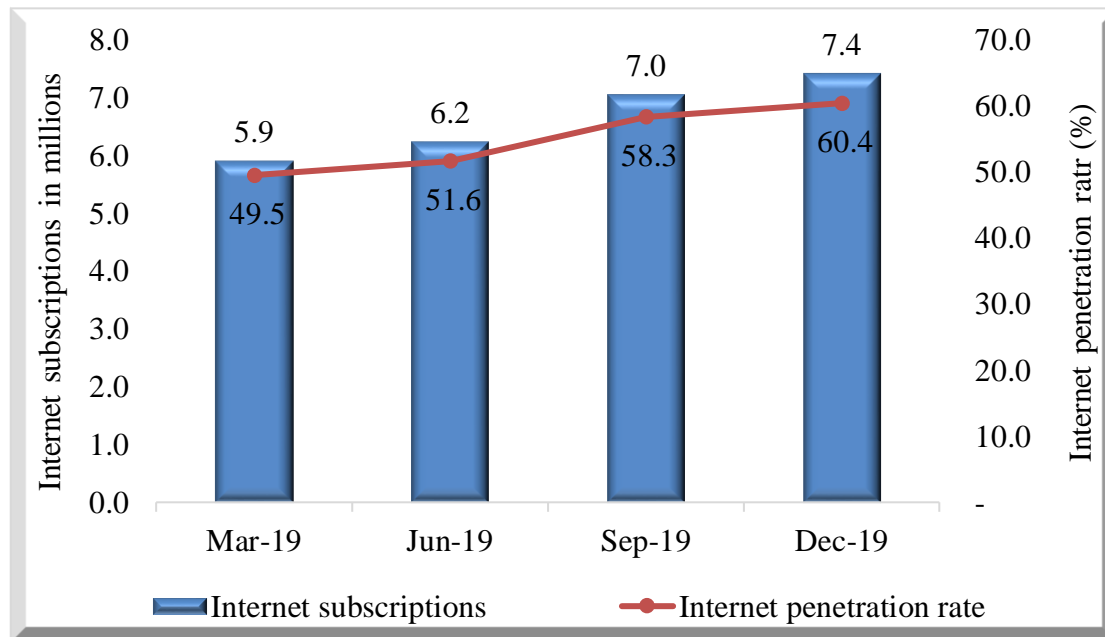
Table 13: Internet subscriptions per category as of the fourth quarter 2019

Name of operators	Fixed internet subscriptions		Mobile internet subscriptions			Total internet subscriptions
	Narrowband (≤ 256 kbps)	Broadband (≥ 256 kbps)	EDGE&GPRS	3G	4G	
MTN Rwanda Ltd	105	1,771	2,867,988	1,019,923	237,907	4,127,695
Airtel Rwanda Ltd		1,242	2,473,704	674,647	116,313	3,265,906
Axiom Networks Ltd		253			4	257
4NetAfrica Ltd		3			510	513
BCS Ltd		11				11
BSC Ltd		2,817			10,137	12,954
Liquid Telecom Ltd		2,452				2,452
CBNET Ltd		7			1,359	1,366
G-MAX Ltd		12			406	418
ISCO ISP Ltd		18			2,361	2,379
NET LINK Ltd		1			472	473
Piramie INC					789	789
Simba Supermarket					465	465
Truconnect Ltd		23			1,192	1,215
BK TechHouse Ltd		21			808	829
Fastnet Ltd		12			1,863	1,875
ISPA Ltd		183				183
Mango Telecom Ltd		3			39,477	39,480
POPCONN Ltd		4			4,779	4,783
RTN Ltd					889	889
AC Group Ltd					375	375
Smart Broadband Ltd		2			300	302
SUKU NSA Ltd		35				35
TNSP Ltd		15			3,044	3,059
NETPRO Ltd					531	531
Total subscriptions	105	8,885	5,341,692	1,694,570	423,981	7,469,233
Penetration rate (%)	0.0	0.1	43.2	13.7	3.4	60.4

Source: Operators' reports, December 2019

Figure 8: Trend of internet subscriptions and internet penetration rate⁴ for the year 2019

During the period under review, the number of internet subscriptions increased by 6.0 percent to reach 7.4 million from 7.0 million recorded in the previous quarter. The internet subscriptions per 100 inhabitants⁵ at the end of December 2019 was 60.4 percent.



Source: Operators' reports, December 2019

4.2. International internet bandwidth

Table 14: International internet bandwidth (Mbps) per operator as of the fourth quarter 2019

Type	UP Link	Down Link
MTN Rwanda Ltd	7,473	7,473
Liquid Telecom Ltd	70,000	70,000
Airtel and Tigo Rwanda Ltd	6,400	6,400
BSC Ltd	5,415	5,900
KTRN Ltd	6,533	6,533
Axiom Networks	2,174	2,174
Total	97,995	98,480

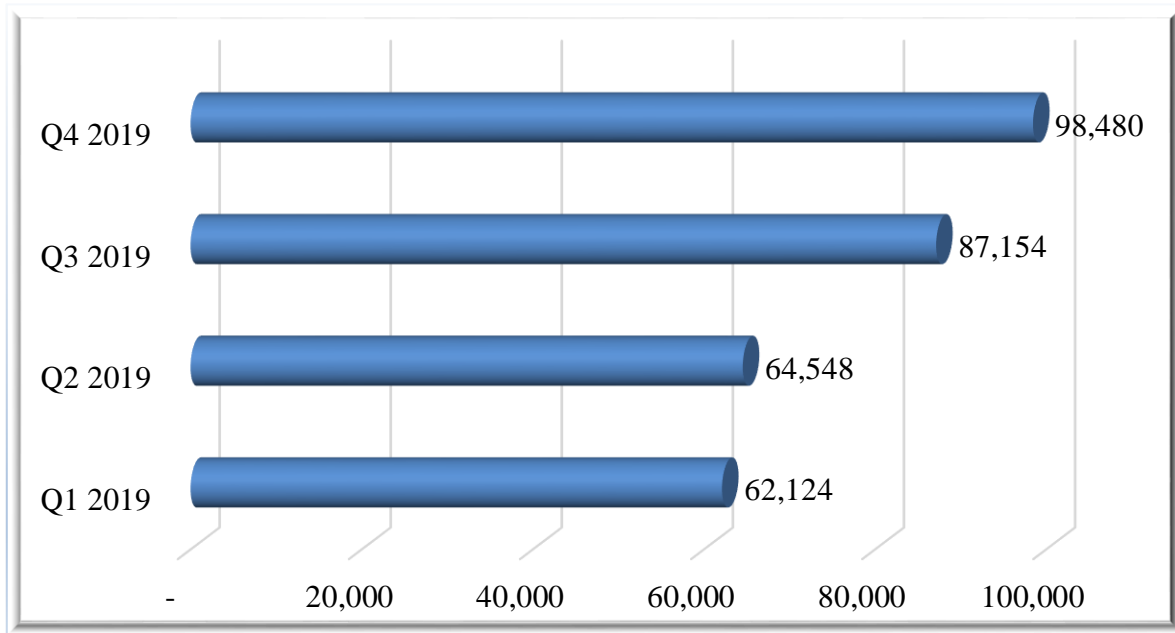
Source: Operators' reports, December 2019

⁴ Internet penetration rate: Internet subscriptions per 100 inhabitants

⁵ Internet subscriptions per 100 inhabitants is the sum of internet subscriptions (fixed and mobile) over the Rwandan population as projected by National Institute of Statistics of Rwanda.

Figure 9: Trend of equipped international internet bandwidth (Mbps) from Q1 to Q4 2019

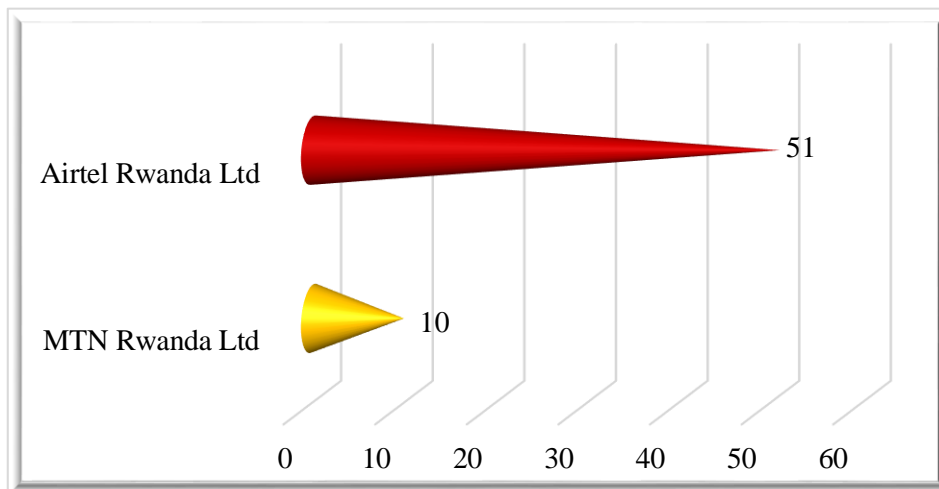
During the quarter under review, the total equipped international internet bandwidth available in the country increased to 98,480 Mbps from 87,154 Mbps reported at the end of the third quarter of year 2019.



Source: Operators' reports, December 2019

4.3. Mobile internet tariff

Figure 10: Standard mobile internet tariff (Frw/MB) as of the fourth quarter 2019



Source: Operators' reports, December 2019

5. TELECOMMUNICATION REVENUES AND INVESTMENT

Table 15: Trend of quarterly revenues (Frw) for the year 2019

Category	Q1 2019	Q2 2019	Q3 2019	Q4 2019
Total Revenues for MNOs and Liquid Telecom Ltd	43,863,982,018	42,653,124,423	44,241,230,904	44,402,330,838
Total revenues for ISPs and Wholesale Network Service Provider	8,248,869,214	9,454,298,445	9,050,378,265	9,580,433,557
Total	52,112,851,233	52,107,422,868	53,291,609,169	53,982,764,395

Source: Operators' reports, December 2019

Table 16: Trend of additional investment (Frw) made in 2019

Category	Q1 2019	Q2 2019	Q3 2019	Q4 2019
Total investment for MNOs and Liquid Telecom Ltd	12,482,904,828	3,959,719,171	4,255,780,732	22,750,234,255
Total investment for ISPs and Wholesale Network Service Provider	1,266,464,902	833,518,733	965,395,622	2,255,480,515
Total	13,749,369,731	4,793,237,904	5,221,176,354	25,005,714,770

Source: Operators' reports, December 2019

6. EMPLOYMENT IN TELECOMMUNICATION SECTOR

One thousand and eleven (1,011) persons were employed in telecommunication sector during this quarter under review, eight hundred ninety-six (896) are permanent staff while one hundred fifteen (115) are temporary staff. The table below illustrates the number of persons employed by operator.

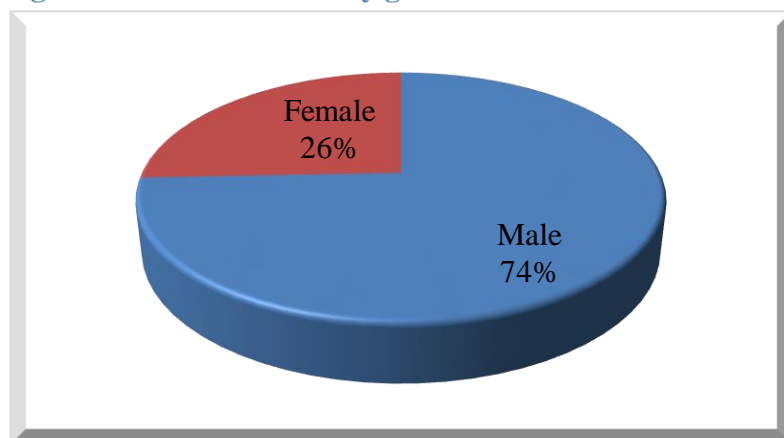
Table 17: Number of staff employed in telecommunication sectors as of December 2019

Operator	Type of contract			Gender		Origin	
	Temporary	Permanent	Total staff	Female	Male	Domestic	Foreign
MTN Rwanda Ltd	8	277	285	87	198	276	9
Airtel Rwanda Ltd	0	126	126	19	107	118	8
Liquid Telecom Ltd	38	59	97	19	78	93	4
ISPA Ltd	1	14	15	5	10	15	0
G-MAX Ltd	0	5	5	2	3	5	0
Truconnect Ltd	3	4	7	2	5	7	0
Axiom Networks Ltd	2	26	28	11	17	25	3
4NetAfrica Ltd	6	4	10	3	7	10	0
TNSP Ltd	26	10	36	4	32	36	0
KTRN Ltd	3	113	116	28	88	113	3
Piramie INC	4	1	5	2	3	3	2
POPCONN Ltd	0	16	16	5	11	15	1
BSC Ltd	15	58	73	19	54	73	0
BCS Ltd	0	2	2	0	2	2	0
AC Group Ltd	0	38	38	10	28	38	0
Fastnet Ltd	3	1	4	2	2	2	2
ISCO ISP Ltd	0	3	3	2	1	3	0
SIMBA Supermarket	0	4	4	1	3	4	0
BK TecHouse Ltd	2	15	17	3	14	17	0
Mango Telecom Ltd	0	82	82	20	62	76	6
Net Link Ltd	2	9	11	3	8	9	2
CBNET Ltd	2	1	3	1	2	3	0
RTN	0	17	17	6	11	17	0
Smart Broadband Ltd	0	3	3	2	1	3	0
SUKU NSA Ltd	0	3	3	1	2	3	0
NETPRO Ltd	0	5	5	2	3	5	0
Total	115	896	1011	259	752	971	40

Source: Operators' reports, December 2019

The two hundred fifty-nine (259) staff representing 26 percent of the total staff are female whereas 74 percent are male as it is shown in the figure below.

Figure 11: Telecom staff by gender as of December 2019



Source: Operators' reports, December 2019

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 fourth quarter of the year 2019.

7.1. Licensed media operators

During the quarter under review, there were two (2) licensed signal distributors, three (3) pay TV operators, thirty-three (33) 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 18: Trends of Licensed media operators from March 2019 to December 2019

Category	Mar-2019	Jun-2019	Sep-2019	Dec-2019
Signal distributors	2	2	2	2
Pay TV operators	4	4	3	3
FM Radio stations	34	34	34	33
Television stations	14	21	18	18
Online media houses	23	23	23	23
Print media houses	30	30	30	30
International media house	3	3	3	3

Source: RURA database

7.2. Pay TV subscriptions

The total number of active subscribers was 56,924 recorded in the fourth quarter of the year 2019 whereas registered subscribers were 267,516.

Table 19: Number of Pay TV subscribers as of December 2019

Name of Pay TV	Active Subscribers	Registered Subscribers
Azam Media Ltd	2,575	13,501
Star Africa Media Ltd	31,913	223,580
Tele 10 Ltd	22,436	30,435
Total	56,924	267,516

Source: Operators' reports, December 2019

7.3. Decoders sold

During this quarter under review, four thousand eight hundred and twenty-one (4,821) decoders were sold by Pay TV operators and reached a total of fourteen thousand three hundred and sixty-six (14,366) decoders sold in the year 2019.

Table 20: Trend of decoders sold from 1st quarter to 4th quarter of 2019

Number of Decoders Sold	Q1 2019	Q2 2019	Q3 2019	Q4 2019	Total
Azam Media Ltd	586	795	426	118	1,925
Star Africa Media Ltd	3,085	2,370	789	4,205	10,449
Tele 10 Ltd	730	373	389	498	1,990
Kwesé Support Services Rwanda Ltd	2	-	-	-	2
Total	4,403	3,538	1,604	4,821	14,366

Source: Operators' reports, December 2019

7.4. Pay TV staff

Table 21: Number of staff employed in Pay TV operators as of December 2019

Operator	Staff per type of contract			Staff per gender		Origin	
	Temporary	Permanent	Total	Female	Male	Domestic	Foreign
Azam Media Ltd	0	11	11	3	8	10	1
Star Africa Media Ltd	10	84	94	26	68	88	6
Tele 10 Ltd	0	29	29	9	20	29	0
Total	10	124	134	38	86	127	7

Source: Operators' reports, December 2019

The total number of staff employed by Pay TV operators as of December 2019 was 134 of which 70.1% are employed by Star Africa Media Ltd, 21.6% by Tele 10 Ltd, and 8.2% are employed by Azam Media Ltd. The 38 staff representing 28.4% of the total staff are female.