



**RWANDA
UTILITIES
REGULATORY
AUTHORITY**

**STATISTICS AND TARIFF INFORMATION IN
TELECOM, MEDIA AND POSTAL SERVICE AS
OF THE FOURTH QUARTER 2018**

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

The information compiled in this report is from Telecom companies, Internet Service Providers, Internet retailers, and Pay TV operators as per their license obligation. An active subscriber is defined as one that has generated revenue within three months of the quarter under review.

Table 1: Key ICT indicators

INDICATORS	Q3 2018	Q4 2018	% change between Q3 and Q4
SUBSCRIPTIONS			
Mobile subscriptions	9,665,544	9,700,609	0.4
Fixed subscriptions	12,962	12,960	0.0
Mobile cellular telephone subscriptions per 100 inhabitants	81.8	82.14	0.4
Fixed telephone subscriptions lines per 100 inhabitants	0.11	0.11	0.0
VOICE TRAFFIC IN MINUTES			
On-Net Voice Traffic	4,249,376,152	4,053,071,203	-4.6
Off-Net Voice Traffic	77,629,222	44,392,832	-42.8
International Outgoing mobile voice traffic	78,563,322	44,354,045	-43.5
International Incoming mobile voice traffic	27,569,051	23,864,832	-13.4
ROAMING SUBSCRIPTIONS			
Roaming-in (Foreign subscribers)	332,935	357,349	7.3
Roaming-Out (Own subscribers)	541,435	665,031	22.8
ROAMING TRAFFIC IN MINUTES			
Roaming traffic -In	15,810,341	13,376,032	-15.4
Roaming traffic-Out	3,384,142	4,301,315	27.1
SMS TRAFFIC IN NUMBERS			
Outgoing SMS On-net	797,358,154	709,428,505	-11.0
Outgoing SMS Off-net	10,048,016	22,049,099	119.4
Incoming International SMS	2,343,251	1,784,223	-23.9
Outgoing International SMS	8,541,477	4,427,968	-48.2
DATA/INTERNET			
Internet subscriptions	5,634,047	6,149,425	9.1
Internet penetration per 100 inhabitants	47.7	52.1	9.1
BROADCASTING			
Number of Television stations	13	13	0.0
Number of Radio FM stations	34	34	0.0
POSTAL AND COURIER			
Licensed postal and courier operators	28	28	0.0

Source: RURA operators' returns

1. MOBILE AND FIXED TELEPHONE SUBSCRIPTIONS

As of December 2018, the operators offering mobile telephone services included MTN Rwanda Ltd, and Airtel/Tigo Rwanda Ltd, and those offering fixed telephone services were Liquid Telecom Ltd, MTN Rwanda Ltd, and Airtel/Tigo Rwanda Ltd.

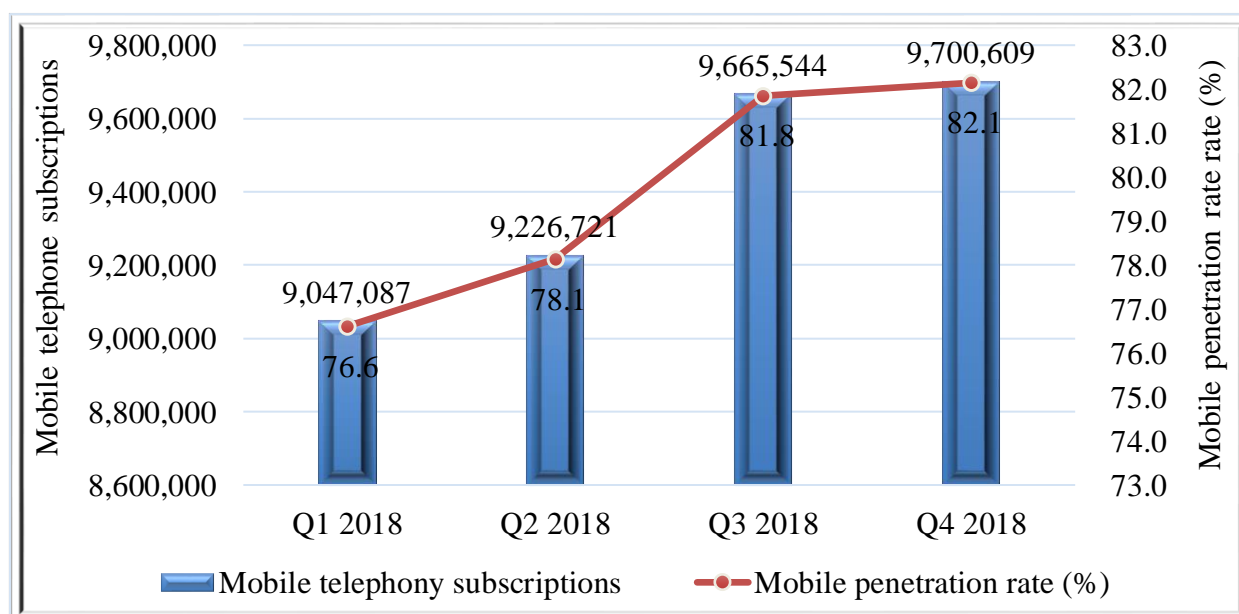
Table 2: Mobile and fixed telephone subscriptions as of December 2018

Name of Operator	Active Subscribers		Fixed telephone penetration (%)	Mobile telephone penetration (%)	Telephone penetration (%)
	Mobile telephone	Fixed Telephone	0.1	82.1	82.2
MTN Rwanda Ltd	4,668,202	2,780			
Airtel/Tigo Rwanda Ltd	5,032,407	9,521			
Liquid Telecom Ltd	-	659			
Total	9,700,609	12,960			

Source: RURA operators' returns

The majority of Rwandan population are continuously using the mobile telephones as one of the platform to share information rather than fixed telephones. As a result, the mobile-cellular telephone subscriptions per 100 inhabitants recorded at the end of December 2018 were 82.1% while fixed telephone subscriptions per 100 inhabitants were 0.1%.

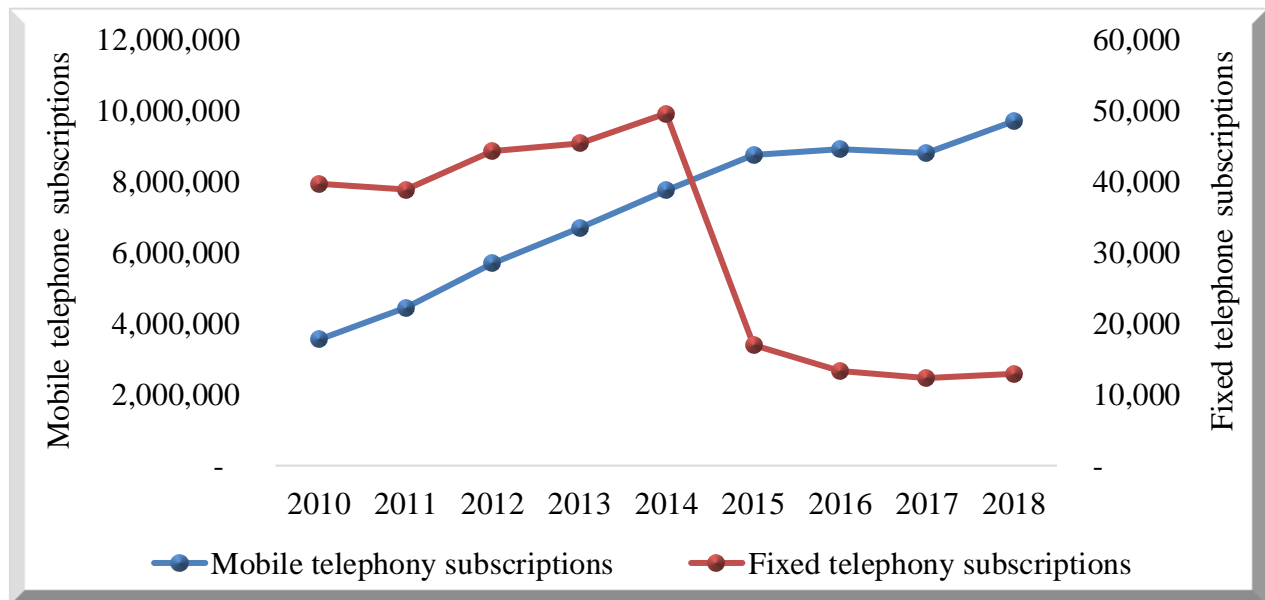
Figure 1: Trend of mobile telephone subscriptions from Q1 to Q4 2018



Source: RURA operators' returns

During this quarter under review, the number of mobile telephone subscriptions increased by 0.4% to reach 9,700,609 from 9,665,544 subscriptions recorded in the previous quarter.

Figure 2: Development of telephone subscriptions from 2010 to 2018



Source: RURA operators' returns

At the end of 2018, the number of active mobile telephone subscriptions (90-days revenue generating subscribers) has increased by 10.0% up to 9,700,609 subscriptions compared to the last year. The same period recorded also an increase in the number of fixed telephone subscriptions up to 12,960 from 12,333 that were recorded at the end of December 2017.

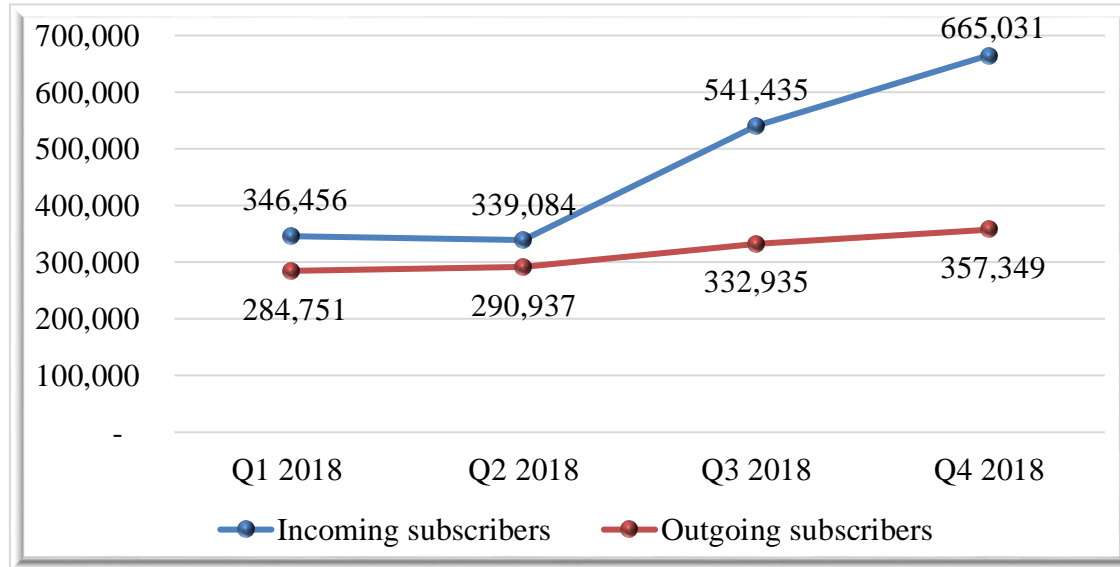
Table 3: International average roaming subscribers as of December 2018

Destination	MTN Rwanda Ltd	Airtel/Tigo Rwanda ltd	Total
Incoming	216,127	448,904	665,031
Outgoing	244,018	113,331	357,349

Source: RURA operators' returns

The international average roaming subscribers during the fourth quarter of the year 2018 stood at 665,031 and 357,349 for incoming and outgoing subscriptions respectively.

Figure 3: Trend of roaming subscribers from 1st quarter to 4th quarter 2018

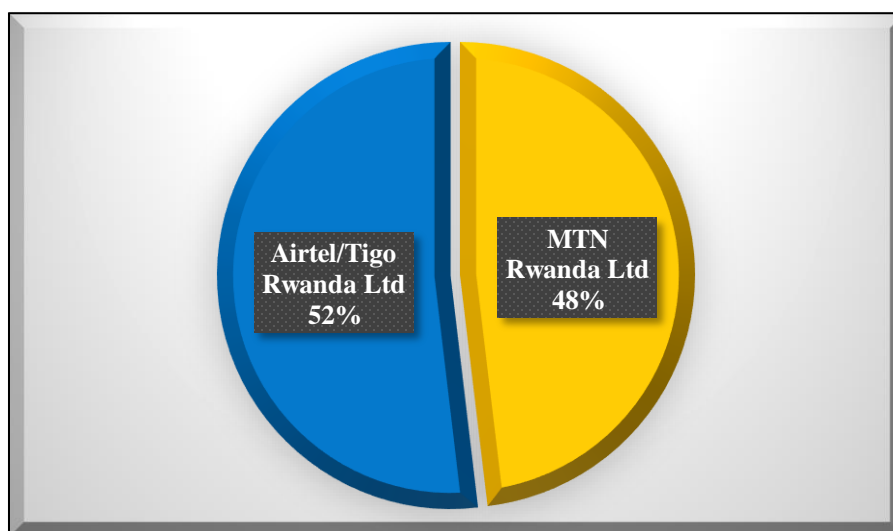


Source: RURA operators' return

The number of roamers out and roamers in increased by 22.8% and 7.3% during this quarter under review to reach 357,349 and 665,031 subscriptions respectively from 332,935 and 541,435 subscriptions recorded during the last quarter.

2. MARKET SHARE

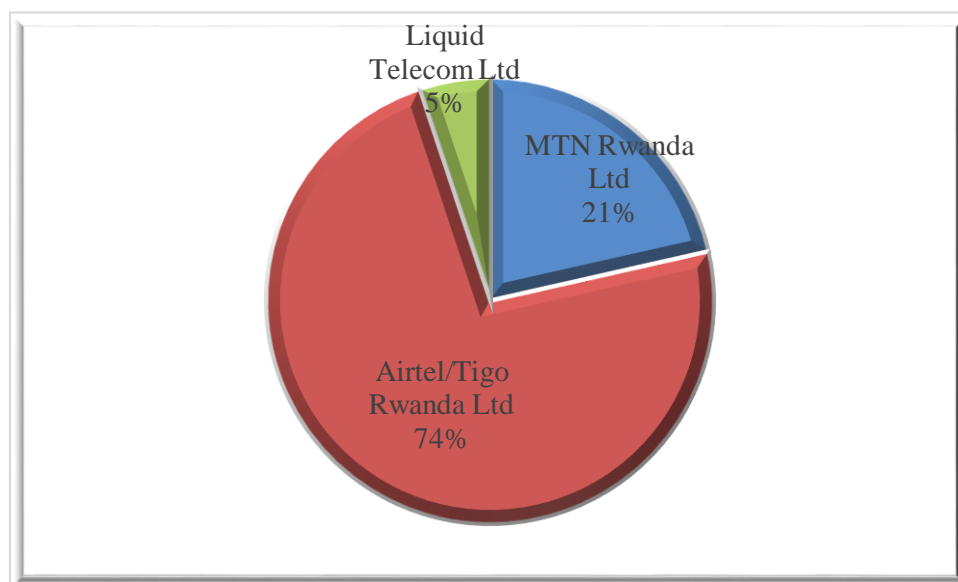
Figure 4: Market share for mobile telephone subscribers per operator as of December 2018



Source: RURA operators' return

At the end of December 2018, MTN Rwanda Ltd recorded 48% of market share in active mobile telephone subscriptions whereas Airtel/Tigo Rwanda Ltd had 52%.

Figure 5: Market share for fixed telephone subscribers per operator as of December 2018



Source: RURA operators' returns

During this quarter under review, Airtel/Tigo Rwanda Ltd had the largest market share of 74% for fixed telephone subscriptions, followed by MTN Rwanda Ltd with 21%, while Liquid Telecom Ltd has 5.0% of the market share.

3. VOICE AND SMS TARIFF STRUCTURE

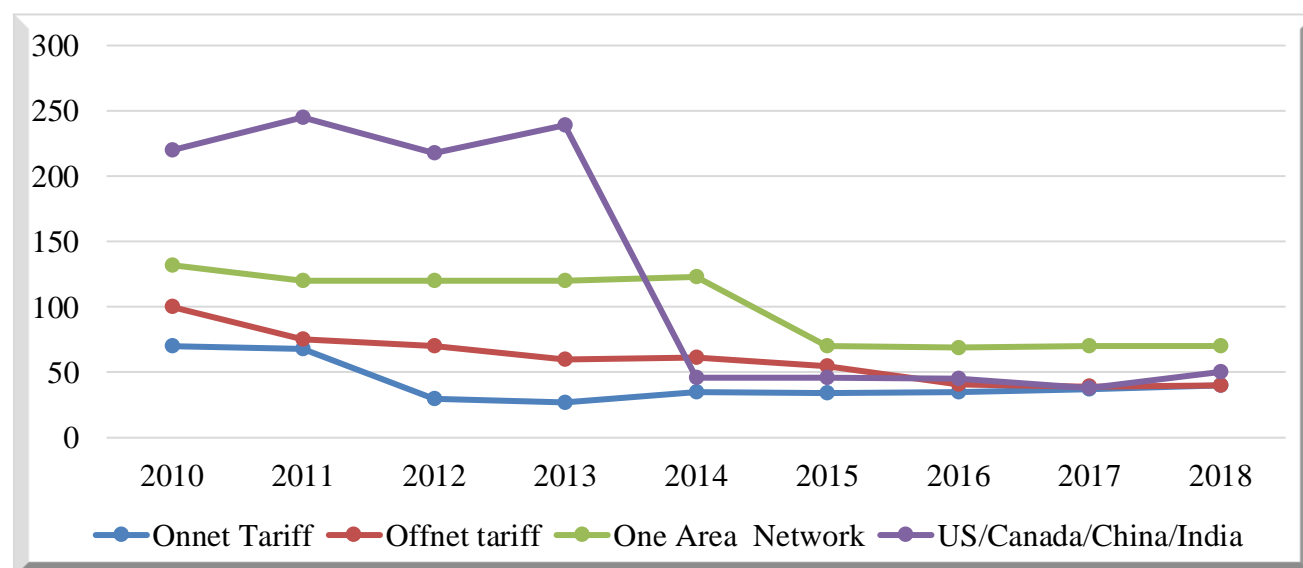
Table 4: Mobile telephone voice tariff (in Rwf) per minute per operator as of December 2018

Destination	MTN Rwanda Ltd	Airtel/Tigo 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: RURA operators' returns

As of December 2018, the average tariff for calling by mobile phone within a telecom operator was 40 Rwf, 40 between telecom operators, 70 for One Area Network, and 51 to call in US, Canada, China, and India.

Figure 6: Trend of average mobile voice tariff (in Rwf) per minute from 2010 to 2018



Source: RURA operators' returns

Table 5: Fixed telephone service tariff structure (in Rwf) per minute as of December 2018

Destination	Liquid Rwanda Ltd	MTN Rwanda Ltd	Airtel/Tigo Rwanda Ltd	Average
On net	20	45	22	29
Off net	60	45	22	42
EAC	135	70	70	92

Source: RURA operators' returns

As of December 2018, the average tariff for calling by fixed telephone within a telecom operator was 29 Rwf, 42 between telecom operators, and 92 for East Africa Countries.

Table 6: SMS tariff structure (in Rwf) as of December 2018

SMS Tariff	MTN Rwanda Ltd	Airtel/Tigo Rwanda Ltd	Average
Onnet tariff	12	15	14
Offnet tariff	26	15	21
ONA	45	45	45
International	80	72	78

Source: RURA, operators' returns

4. TRAFFIC STATISTICS

4.1. Voice traffic for outgoing and incoming traffic

Table 7: Outgoing and incoming traffic (in minutes) per operator as of 31st December 2018

Voice traffic	MTN Rwanda Ltd	Airtel/Tigo Rwanda Ltd	Total
Outgoing calls			
On net	2,190,310,503	1,862,760,700	4,053,071,203
Off net	19,441,859	24,950,973	44,392,832
International	41,736,095	2,617,950	44,354,045
Incoming calls			
Off net	27,882,164	16,106,234	43,988,398
International	22,903,296	961,536	23,864,832

Source: RURA operators' returns

During this quarter under consideration, the total volume of minutes originating from mobile networks was 4.0 billion minutes, the total minutes originating from own mobile networks to other mobile networks was 44.3 million, and the total minutes from mobile networks to international networks was 44.3 million.

4.2. Voice for outgoing and incoming roaming traffic

Table 8: Outgoing and incoming roaming traffic (in minutes) per operator as of the 31st December 2018

Destination	MTN Rwanda Ltd	Airtel/Tigo Rwanda ltd	Total
Incoming	13,154,422	221,610	13,376,032
Outgoing	1,161,735	3,139,580	4,301,315

Source: RURA, operators' returns

During this quarter 4, the total volume of minutes generated by foreigners roaming in Rwanda was 13.4 million minutes whereas the total minutes generated by Rwanda mobile networks' subscribers roamed outside the country was 4.3 million minutes.

Table 9: SMS traffic (in numbers) as of 31st December 2018

	MTN Rwanda Ltd	Airtel &Tigo Rwanda Ltd	Total
Outgoing			
On net	484,187,972	225,240,533	709,428,505
Off net	837,857	21,211,242	22,049,099
International	671,459	3,756,509	4,427,968
Incoming SMS			
Off net	3,571,178	19,484,921	23,056,099
International	813,211	971,012	1,784,223

Source: RURA operators' returns

The total volume of SMS traffic originating from mobile networks was 709.4 million SMS, the total SMS traffic originating from own mobile networks to other mobile networks was 22.0 million, and the total SMS traffic from mobile networks to international networks was 4.4 million.

5. STATUS OF INTERNET SERVICE PROVISION

5.1. Licensed operators

Table 10: Licensed internet service providers as of December 2018

SN	Name of licensee
Mobile Telecom Operators	
1	MTN Rwanda Ltd
2	Airtel/Tigo Rwanda Ltd
Internet Service Providers	
1	Liquid Telecom Ltd
2	BSC Ltd
3	ISPA Ltd
4	4G Networks
5	Axiom Networks
Wholesale Network Service Provider	
1	KT Rwanda Networks Ltd
Retail Internet Service Providers	
1	4NET AFRICA
2	G-MAX
3	INTERCOM
4	PIRAMIE
5	TNSP
6	WIRECELL
7	ECOORPONE

SN	Name of licensee
8	TWINNING IN COORPORATION
9	SIMBA SUPERMARKET
10	TRUCONNECT LTD
11	POPCONN LTD
12	SUKU NSA
13	BK TELECOM LTD
14	ISCO ISP LTD
15	UNIVERSAL LINKS GROUP
16	Zoomnet Ltd
17	Fastnet Ltd
18	CBNET Ltd
19	Smart Broadband Ltd
20	NET LINK LTD
21	RWANDA TELECENTRE NETWORK (RTN)
22	Broadband Digitech System Ltd
23	Afronet
24	NETPRO Limited
25	AC Group Limited
26	Mango Telecom
27	Offwire Rwanda Network

5.2. Internet subscriptions

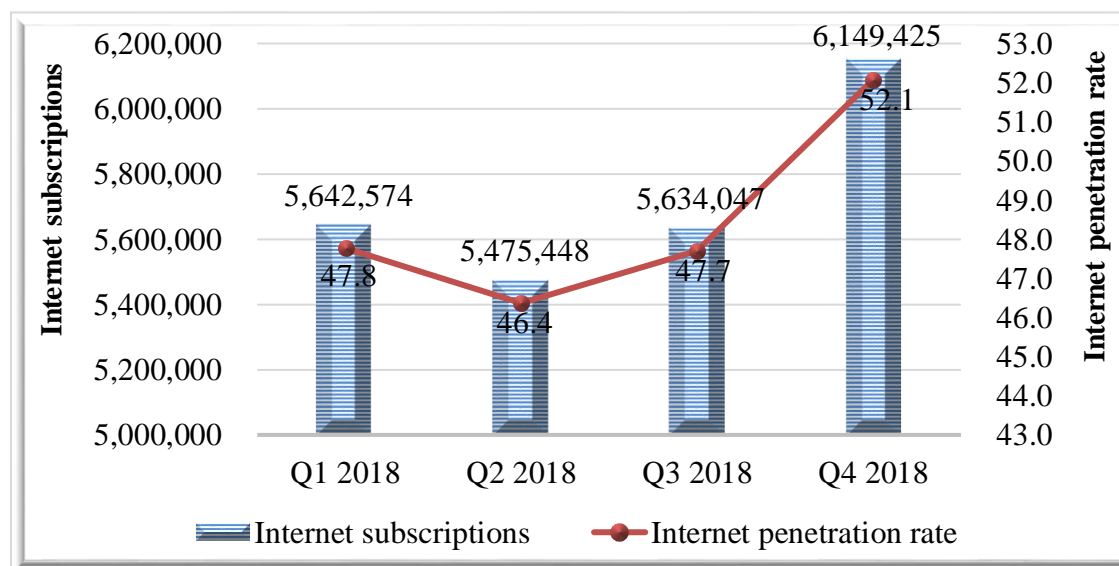
Table 11: Internet subscriptions per category as of December 2018

Operators	Fixed internet		Mobile internet			Total internet subscribers
	Narrowband (≤ 256 kbps)	Broadband (≥ 256 kbps)	EDGE&GPRS	3G	4G	
MTN Rwanda ltd	108	1,842	2,550,414	891,027	4,979	3,448,370
Airtel/Tigo Rwanda ltd		1,035	2,248,725	423,048	437	2,673,245
Axiom Networks ltd		232			8	240
4NetAfrica Ltd		4			60	64
BCS Ltd		6				6
BSC Ltd		2,317			7,953	10,270
Liquid Telecom ltd		1,736				1,736
CBNET Ltd		4			399	403
G-MAX Ltd		13			371	384
ISCO ISP Ltd		8			269	277
NET LINK LTD		1			108	109
Piramie INC					1,350	1,350
Simba Supermarket					205	205
Truconnect		17			610	627
BK Techouse		23			333	356
Fastnet		8			1,339	1,347
ISPA Ltd		175				175
Mango Telecom Ltd		2			2,767	2,769
POPCONN Ltd		3			5,966	5,969
RTN					453	453
AC Group Ltd					420	420
Smart Broadband Ltd		2			95	97
SUKU NSA LTD		63				63
TNSP		10			222	232
NETPRO LTD					258	258
Total	108	7,501	4,799,139	1,314,075	28,602	6,149,425

Source: RURA operators' returns

As illustrated in Table 12, the total number of internet subscriptions stood at 6.1 million at the end of the fourth quarter 2018.

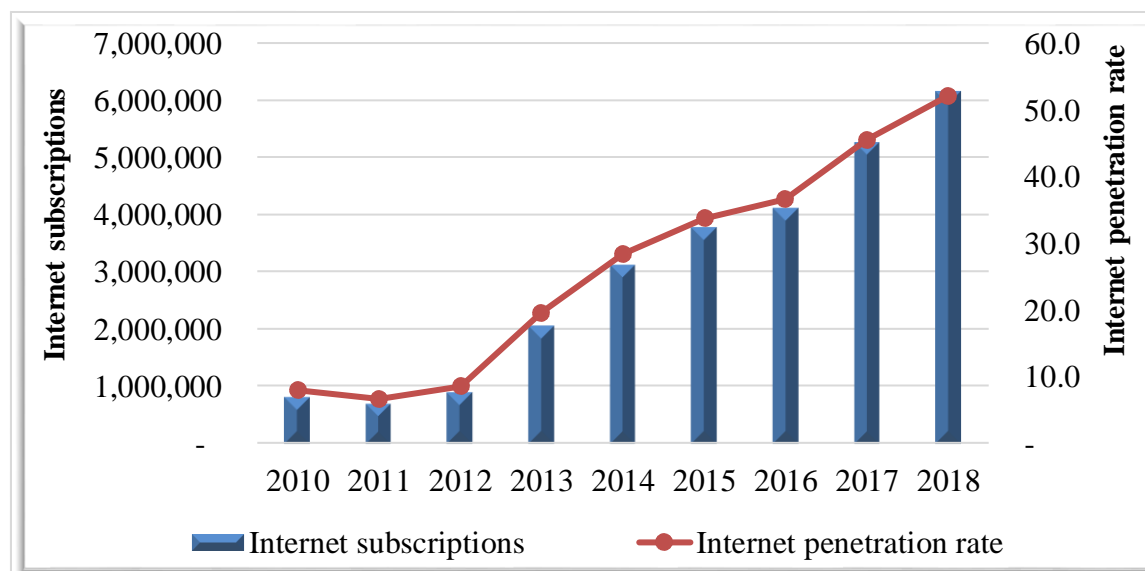
Figure 7: Trend of internet subscriptions and internet penetration from Q1 to Q4 2018



Source: RURA operators' returns

During this quarter under review, the number of internet subscriptions grew by 9.1% to reach 6,149,425 from 5,634,047 subscriptions recorded in the previous quarter. The internet subscriptions per 100 inhabitants at the end of December 2018 was 52.1%.

Figure 8: Trend of internet subscriptions and internet penetration from 2010 to 2018



Source: RURA operators' returns

At the end of 2018, the number of internet subscriptions increased by 17.1% to reach 6,149,425 from 5,252,996 subscriptions recorded at the end of December 2017.

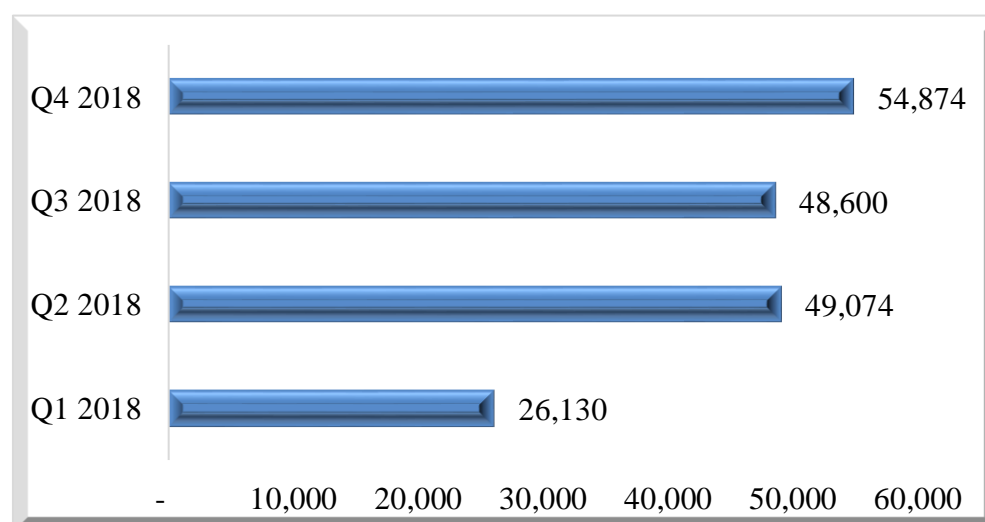
5.3. International internet bandwidth

Table 12: International internet bandwidth (Mbps) per operator as of 31st December 2018

Type	UP Link	Down Link
MTN Rwanda Ltd	6,449	6,449
Liquid	33,000	33,000
Airtel/Tigo	5,700	5,700
ISPA	250	250
BSC	5,415	5,415
KTRN Ltd	2,860	2,860
Axiom	1200	1200
Total	54,874	54,874

Source: RURA operators' returns

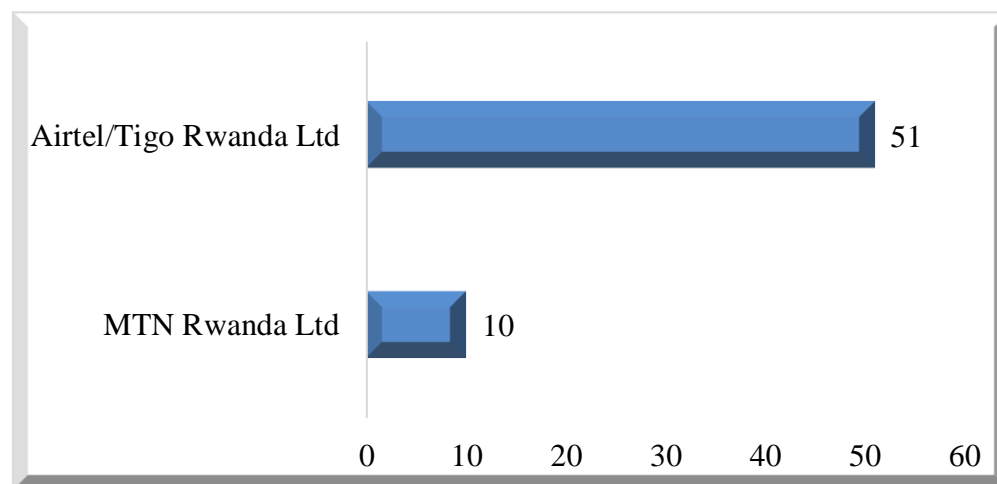
Figure 9: Trend of equipped international internet bandwidth (Mbps) from Q1 to Q4 2018



Source: RURA operators' returns

5.4. Mobile Internet Tariff

Figure 10: Standard mobile Internet tariff (Rwf/Mb) as of 31st December 2018



Source: RURA operators' returns

Table 13: 4G LTE retail tariffs (in Rwf VAT inclusive) as of the fourth quarter 2018

VOLUME BASED TARIFFS	MTN	Airtel/Tigo	Axiom	Truconnect	POPCONN	G-MAX	BSC Ltd	4NetAfrica Ltd	CBNET Ltd	NET LINK LTD	Pirame INC	RTN	TNSP	ISCO ISP Ltd	Simba Supermarket	BK Techouse	Fastnet	Mango Telecom Ltd	NETPRO LTD
150 MB	500 (day)																		
500 MB	1500 (day)																		
1GB	1500 (day)					1000 (day)						1000 (day)			1000 (day)		2,800 (week)	1,000 (day)	
1GB	3,000 (7 days)	3,500		2,700	2,700	2,900	3,000		2,700		3,800	2,700	2,700	2,700	2,700	3,540	2,500	2,600	2,700
3GB	8,000 (Week)											4,000					4,500	3,800	
4GB	10,000 (Week)																		
5GB	15,000 (Month)	16,000	12,000	12,000	11,000	11,000	11,000	12,500	13,500	14,000	13,700	12,000	15,000	10,000	11,500	13,500	11,000	11,000	11,000
10GB		30,500	20,000	22,000	19,000	18,000	19,000	20,000	27,000	22,500	28,101	18,000	20,000	19,000	19,000	18,900	20,000	17,000	19,000
30GB		82,000		50,000	49,000	42,000	42,000	38,500	80,000	47,500		58,000	42,000	44,000	43,900	50,000	45,000	49,000	
50GB		133,000	80,000	90,000	89,000	82,000	81,000		130,000	94,500	125,600		90,000	83,000	85,000	85,000	90,000	85,000	89,000
70GB																			
90GB								65,000				65,000							
100 GB		260,000		160,000		155,000	155,000		260,000	185,000				154,000	162,500	162,500	170,000	162,000	169,000
120GB								85,000				87,000							
Isanzure 5GB				5,500	5,500	5,500				7,500		5,500			6,000			5,300	55,000
Isanzure 10GB				10,000	10,000	10,000				12,500		10,000			11,000			9,500	10,000
Home Broadband 30GB				55,000	55,000	55,000				67,000								52,000	55,000
Home Broadband 50 GB				75,000	75,000	74,000				72,000								72,000	75,000
Smart 500MB/Day				17,000		18,000						13,500							
MUP 0.5GB/Day	30,000			15,000		12,500	14,000			15,000	19,000				17,000	12,600	17,000		
MUP 1GB/Day	50,000	23,000	25,000	25,000		25,000	24,000		25,000	26,000					25,500	25,000	25,000		
MUP 3GB/Day	130,000	69,000	60,000	65,000		68,000	64,000			74,500					65,000	65,000	65,000		
MUP 4GB/Day		134,000	95,000	95,000		89,000	85,000		95,000	105,000					94,000	85,500	53,500		
Unlimited 100 GB		275,000		250,000	270,000		289,900		280,000	285,000	272,520			265,000	260,000	277,000	265,000	250,000	270,000
Unlimited 200 GB				460,000	460,000		529,000		480,000	485,000	495,600			455,000	495,500	500,000	480,000	450,000	460,000

Source: RURA operators' returns

Table 14: Trend in telecom revenues (Rwf) in 2018

Category	Q1 2018	Q2 2018	Q3 2018	Q4 2018
Total MNOs Revenues and Liquid Revenues	37,839,069,770	38,248,391,669	40,350,469,721	41,402,829,839
Total ISPs , 4G retailers and wholesale Network Service Provider	5,254,290,182	6,610,304,398	7,353,054,072	7,436,532,559
Total	43,093,359,951	44,858,696,067	47,703,523,793	48,839,362,398

Source: RURA operators' returns

Table 15: Trend in telecom investment in 2018

Category	Q1 2018	Q2 2018	Q3 2018	Q4 2018
Total MNOs Revenues and Liquid Revenues	21,988,771,397	8,947,427,096	564,652,824	2,480,041,696
Total ISPs , 4G retailers and wholesale Network Service Provider	1,992,623,441	2,200,872,921	1,824,814,794	2,132,163,554
Total	23,981,394,838	11,148,300,017	2,389,467,618	4,612,205,250

Source: RURA operators' returns

6. EMPLOYMENT IN TELECOMMUNICATION SECTOR

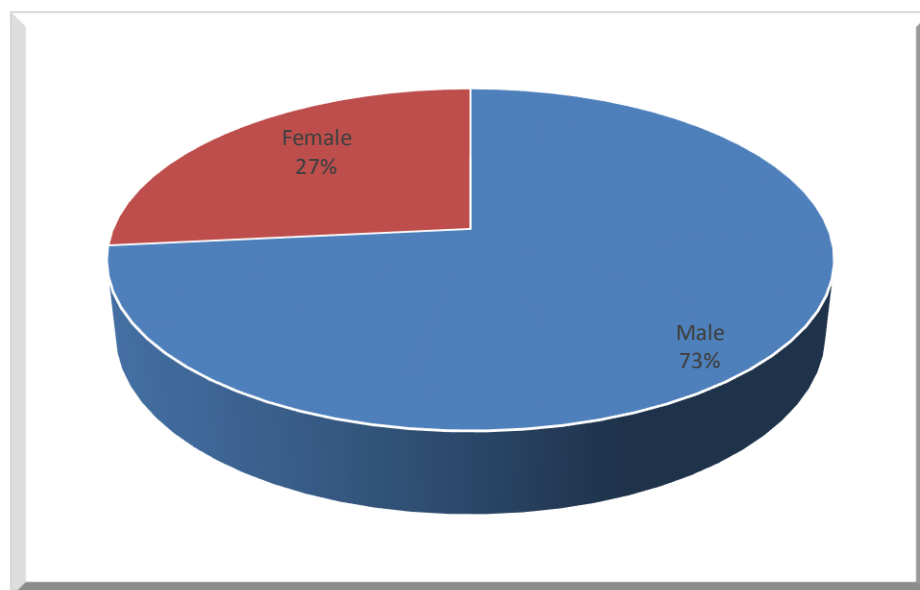
The 930 people are employed in Telecommunication sector, 837 are permanent staffs while 93 are temporary staffs and 27% of these staffs are female while 73% are male as it is shown in the following table:

Table 16: Number of staffs employed in telecommunication sectors as of December 2018

Operator	Temporary	Female	Foreign	Permanent	Outsourced	Total staff
MTN Rwanda Ltd	10	88	8	271	191	281
Airtel/Tigo Rwanda Ltd	0	22	6	129	178	129
Liquid Telecom Ltd	19	11	4	58	0	77
ISPA Ltd	0	4	0	20	0	20
G-MAX	0	2	0	5	0	5
Truconnect	6	6	0	9	0	15
Axiom Networks Ltd	5	10	3	30	0	35
4NetAfrica Ltd	7	5	0	5	0	12
TNSP	1	2	0	9	3	10
KTRN Ltd	2	32	4	121	0	123
Piramie INC	4	2	2	1	1	5
Popconn Ltd	0	5	3	20	0	20
BSC Ltd	25	19	0	48	0	73
BCS Ltd	0	0	0	1	0	1
AC Group Ltd	0	10	0	38	0	38
FastNet	1	0	0	2	0	3
ISCO ISP Ltd	0	2	0	3	0	3
SIMBA Supermarket	0	1	0	3	0	3
BK Techouse	6	3	0	12	0	18
Mango Telecom Ltd	0	6	4	17	0	17
NET LINK LTD	0	3	0	8	0	8
CBNET Ltd	2	1	0	1	0	3
RTN	0	5	0	12	0	12
Smart Broadband Ltd	0	3	0	6	0	6
SUKU NSA LTD	0	1	0	3	0	3
NETPRO LTD	5	4	0	5	0	10
Total	93	247	34	837	373	930

Source: RURA operators' returns

Figure 11: Staffs by gender as of December 2018



Source: RURA operators' returns

7. MEDIA

The table below shows the number of licensed TV stations, FM Radio Broadcasters, newspapers, and signal distributors registered to operate in Rwanda during the fourth quarter of the year 2018.

Table 17: Licensed media operators as of December 2018

Category	Q1 2018	Q2 2018	Q3 2018	Q4 2018
Signal distributors	2	2	2	2
Pay TV operators	4	4	4	4
FM Radio stations	35	34	34	34
Television stations	14	12	13	13
Online media houses	19	23	23	23
Print media houses	28	28	28	28
International media house	3	3	3	3

Source: RURA database

During the quarter under review, there are 2 licensed signal distributors, 4 pay TV operators, 34 FM radio stations, 13 television stations, 23 online media houses, 28 print media houses, and 3 international media houses.

Table 18: Number of Pay TV subscribers as of December 2018

Name of Pay TV	Active Subscribers	Registered Subscribers
Azam Media Ltd	3,632	7,978
Star Africa Media Ltd	39,500	246,000
Tele 10 Ltd	15,665	25,005
Kwesé Support Services Rwanda Ltd	281	780
Total	59,078	279,763

Source: RURA operators' returns

Table 19: Trend of decoders sold as of the fourth quarter 2018

Number of Decoders Sold	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Total
Azam Media Ltd	627	408	0	474	1,509
Star Africa Media Ltd	1,681	4,008	1,609	2,582	9,880
Tele 10 Ltd	514	651	574	583	2,322
Kwesé Support Services Rwanda Ltd	20	66	47	34	167

Source: RURA operators' returns

8. POSTAL AND COURIER SERVICES

Table 20: Licensed postal and courier operators as of December 2018

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

SN	Name of licensee	Type of license
21	Omega Ltd	Domestic courier License
22	Virunga Courier Express Ltd	Domestic courier License
23	Matunda Express Ltd	Domestic courier License
24	Common Rock Ltd	Domestic courier License
25	Fast Rwanda Courier Ltd	Domestic courier License
26	International Express Ltd	Domestic courier License
27	Trinity Transporters And Distributors Company Ltd	Regional Courier License
28	Target Today Delivery Ltd	International Courier License

Source: RURA database