

**STATISTICS REPORT FOR TELECOM,
MEDIA AND POSTAL SECTOR AS OF THE
SECOND 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

The information compiled in this report is from Telecom companies, internet service providers, 4G internet retailers, and Pay TV operators as per their license obligations. 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	Q1 2019	Q2 2019	% change between Q1 and Q2
SUBSCRIPTIONS			
Mobile telephone subscribers	9,326,267	9,040,327	-3.1
Fixed telephone subscribers	10,069	10,175	1.1
Mobile telephone penetration rate (%)	77.1	74.8	-3.1
Fixed telephone penetration rate (%)	0.1	0.1	1.1
VOICE TRAFFIC IN MINUTES			
On-Net Voice Traffic	3,554,141,478	3,804,781,683	7.1
Off-Net Voice Traffic (Outgoing)	33,053,615	33,419,297	1.1
International Outgoing mobile voice traffic	9,140,343	9,853,537	7.8
International Incoming mobile voice traffic	22,610,061	24,937,710	10.3
ROAMING SUBSCRIPTIONS			
Roaming-in (Foreign subscribers)	450,262	440,827	-2.1
Roaming-Out (Own subscribers)	385,508	363,336	-5.8
ROAMING TRAFFIC IN MINUTES			
Roaming traffic -In	16,546,615	17,143,896	3.6
Roaming traffic-Out	3,727,787	3,617,395	-3.0
SMS TRAFFIC			
Outgoing SMS On-net	394,261,591	575,901,341	46.1
Outgoing SMS Off-net	6,168,880	5,981,682	-3.0
Incoming International SMS	1,097,429	620,432	-43.5
Outgoing International SMS	5,467,305	441,724	-91.9
INTERNET			
Internet subscribers	5,981,638	6,234,520	4.2
Internet penetration rate (%)	49.5	51.6	4.2
BROADCASTING			
Number of Television stations	14	21	50.0
Number of Radio FM stations	34	34	0.0
POSTAL AND COURIER			
Number of postal and courier operators	28	28	0.0

1. MOBILE AND FIXED TELEPHONE SUBSCRIPTIONS

As of June 2019, the operators offering mobile telephone services were MTN Rwanda Ltd, and Airtel/Tigo Rwanda Ltd, and those offering fixed telephone services were Liquid Telecom Ltd, and Airtel/Tigo Rwanda Ltd.

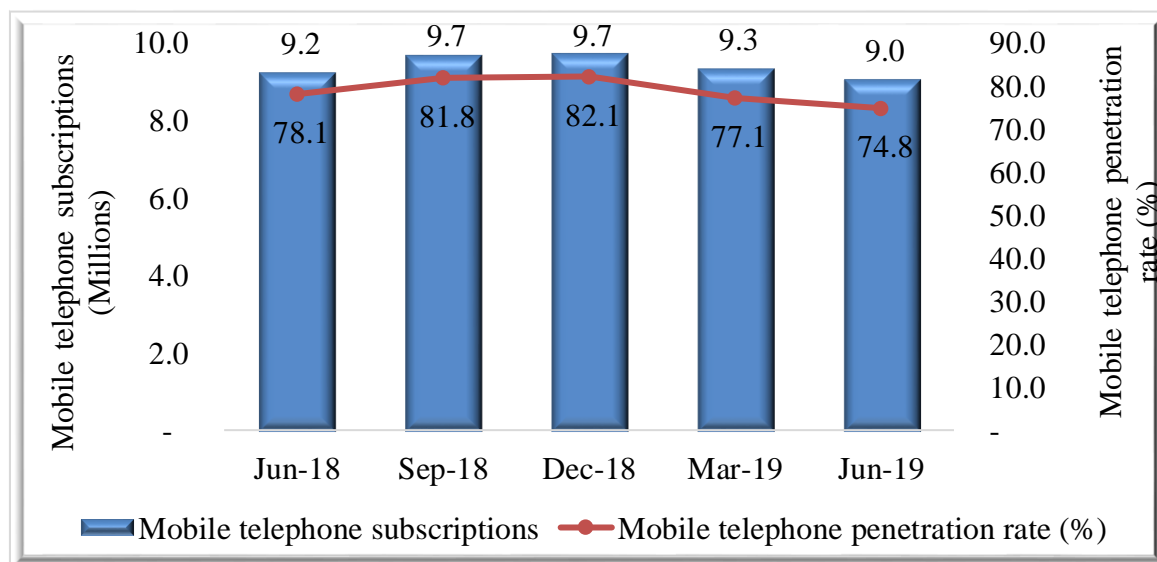
Table 2: Mobile and fixed telephone subscriptions as of June 2019

Name of Operator	Active Subscribers		Fixed telephone penetration (%)	Mobile telephone penetration (%)	Telephone penetration (%)
	Mobile Telephone	Fixed Telephone			
MTN Rwanda Ltd	4,874,797	-	0.1	74.8	74.9
Airtel/Tigo Rwanda Ltd	4,165,530	9,521			
Liquid Telecom Ltd		654			
Total	9,040,327	10,175			

Source: Operators' reports, June 2019

The majority of Rwandan population are subscribed to mobile network as one of the platform to share information rather than fixed telephone. As results, the mobile telephone penetration rate recorded at the end of June 2019 was 74.8 percent while fixed telephone penetration rate was 0.1 percent.

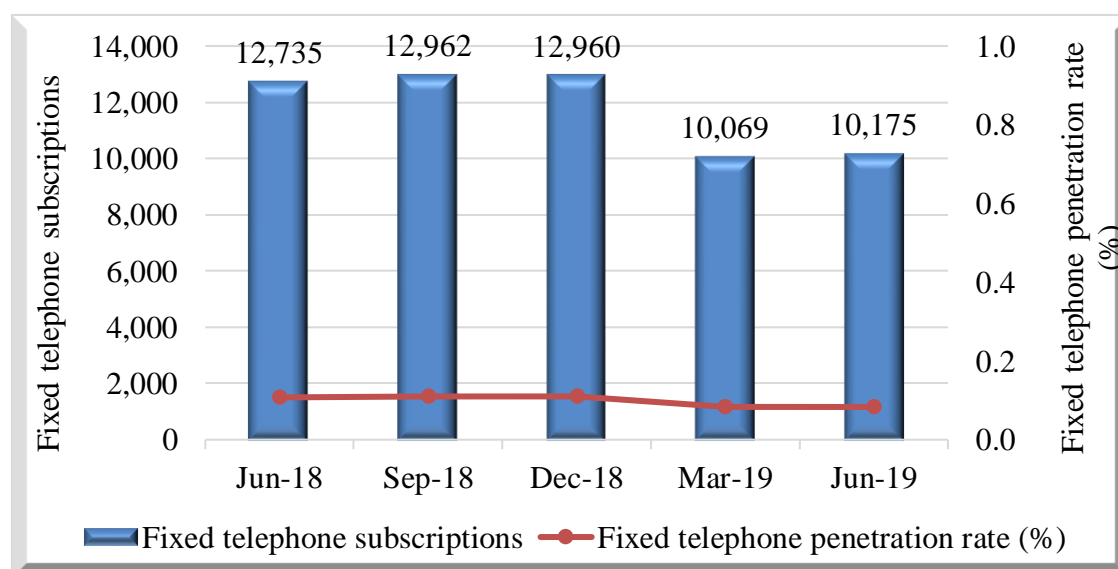
Figure 1: Trend of mobile telephone subscriptions and penetration rate as of June 2019



Source: Operators' reports, June 2019

As of June 2019, the number of mobile telephone subscriptions in the country stood at 9.0 million from 9.3 million recorded at the end of March 2019. During this period under review, the mobile telephone penetration rate decreased to 74.8 percent from 77.1 percent recorded in the previous quarter. This drop is attributed to the clean-up exercise for limiting the number of sim cards ownership where each subscriber must not exceed six (6) SIM cards under one ID or two SIM cards under one passport.

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



Source: Operators' reports, June 2019

The number of fixed telephone subscriptions increased to 10,175 at the end of June 2019 from 10,069 recorded as of the first quarter of 2019. As result, fixed telephone penetration rate was 0.1 percent.

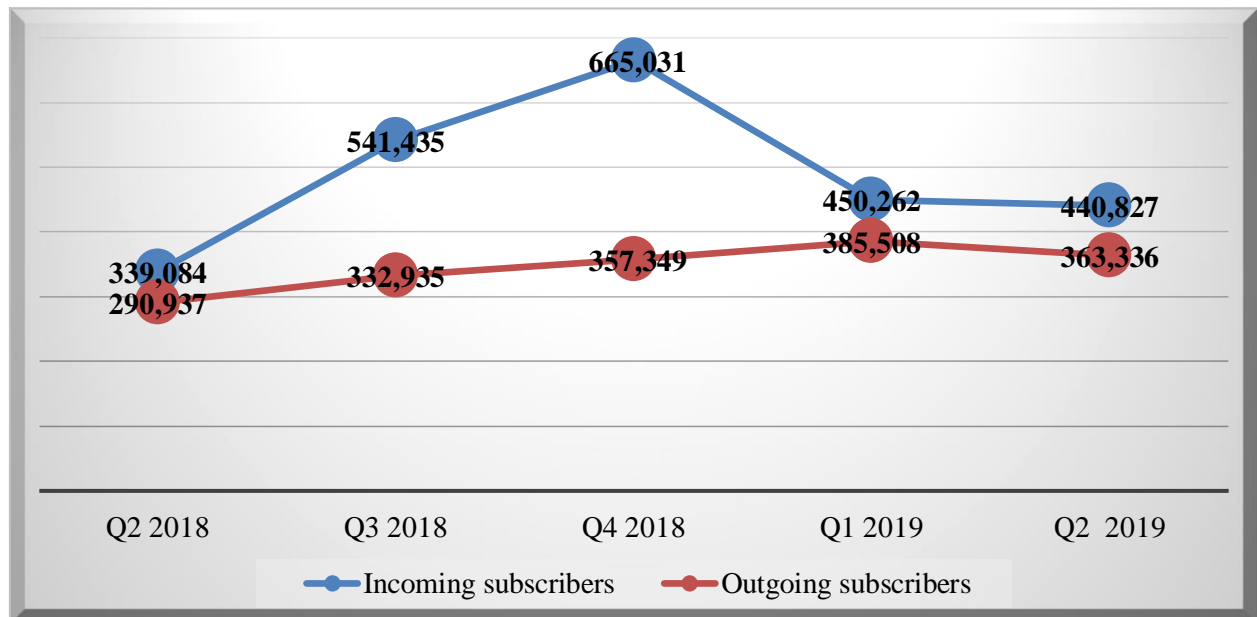
Table 3: International average roaming subscribers as of June 2019

Destination	MTN Rwanda Ltd	Airtel/Tigo Rwanda Ltd	Total
Incoming	200,546	240,282	440,827
Outgoing	247,963	115,373	363,336

Source: Operators' reports, June 2019

The international average roaming subscribers during the second quarter of the year 2019 stood at 440,827 and 363,336 for incoming and outgoing subscriptions respectively.

Figure 3: Trend of average roaming subscribers from March 2018 to June 2019

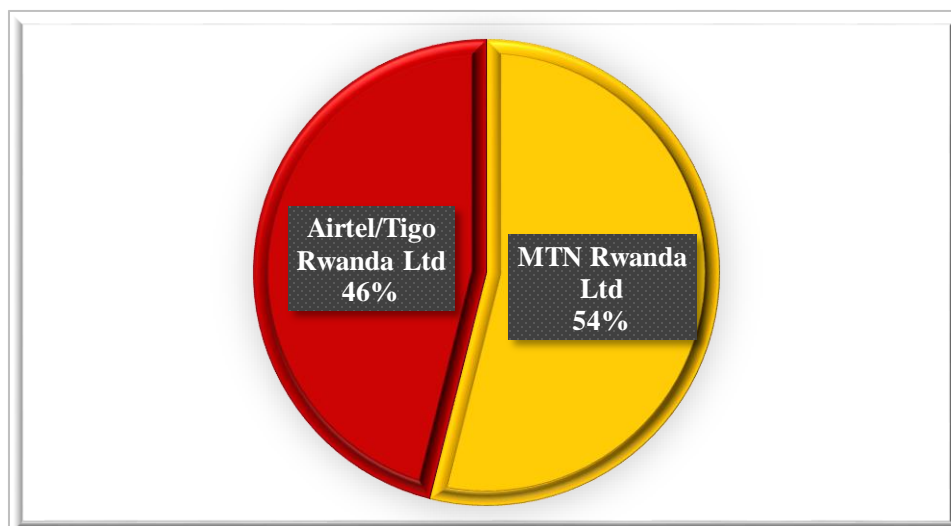


Source: Operators' reports, June 2019

The average number of roamers out decreased by 5.8 percent to 363,336 from 385,508 subscriptions whereas the number of roamers in decreased by 2.1 percent to 440,827 from 450,262 subscriptions recorded during the previous quarter.

2. MARKET SHARE

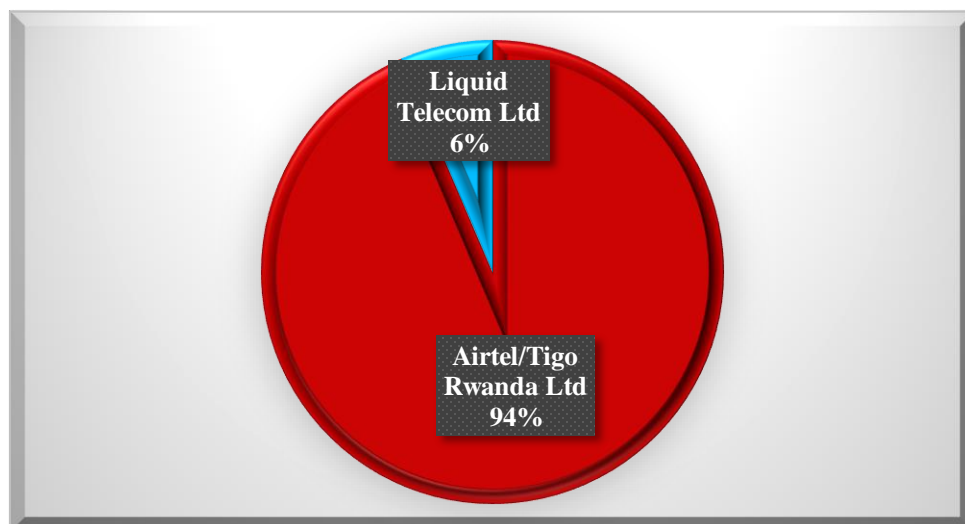
Figure 4: Market share for mobile telephone subscriptions per operator as of June 2019



Source: Operators' reports, June 2019

During the quarter under review, MTN Rwanda Ltd recorded the highest market share of 54 percent in active mobile telephony subscriptions whereas Airtel/Tigo Rwanda Ltd had 48 percent.

Figure 5: Market share for fixed telephone subscribers per operator as of June 2019



Source: Operators' reports, June 2019

During this quarter under review, Airtel/Tigo Rwanda Ltd had the largest market share of 94 percent in fixed telephony subscriptions, whereas Liquid Telecom Ltd has 6.0 percent.

3. VOICE AND SMS TARIFF STRUCTURE

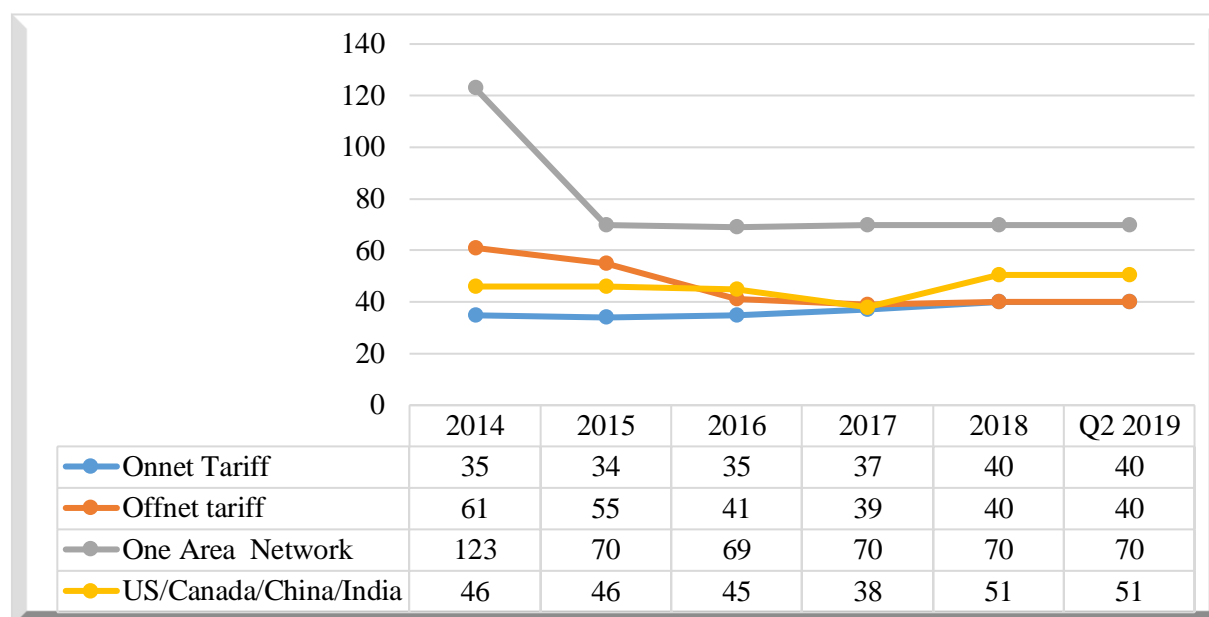
Table 4: Mobile telephone voice tariff (in Rwf) per minute per operator as of June 2019

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: Operators' reports, June 2019

As of June 2019, 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 2014 to Q2 2019



Source: Operators' reports, June 2019

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

Destination	Liquid Rwanda Ltd	Airtel/Tigo Rwanda Ltd	Average
On net	20	22	21
Off net	60	22	41
One Area Network	135	70	103

Source: Operators' reports, June 2019

As of June 2019, the average tariff for calling by fixed telephone within a telecom operator was 21 Rwf, 41 between telecom operators, and 103 to call in East Africa Countries.

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

Destination	MTN Rwanda Ltd	Airtel/Tigo Rwanda Ltd	Average
Onnet tariff	12	15	14
Offnet tariff	26	15	21
One Area Network	45	45	45
International	80	75	78

Source: RURA, operators' returns

As of June 2019, the average tariff for sending a message by mobile phone within a telecom operator was 14 Rwf, 21 between telecom operators, 45 to One Area Network and 78 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 June 2019

Destination	MTN Rwanda Ltd	Airtel/Tigo Rwanda Ltd	Total
Outgoing calls			
On net	2,650,113,231	1,154,668,452	3,804,781,683
Off net	18,624,417	14,794,880	33,419,297
International	9,087,806	765,731	9,853,537
Incoming calls			
Off net	13,745,327	19,895,289	33,640,616
International	19,030,090	5,907,620	24,937,710

Source: Operators' reports, June 2019

During this quarter under review, the total volume of minutes originating within mobile networks was 3.8 billion minutes, the total minutes originating from one mobile networks to other mobile networks was 33.4 million, and the total minutes from mobile networks to international networks was 9.8 million.

4.2. Voice for outgoing and incoming roaming traffic

Table 8: Outgoing and incoming roaming traffic (in minutes) per operator as of June 2019

Destination	MTN Rwanda Ltd	Airtel/Tigo Rwanda Ltd	Total
Incoming	16,977,716	166,180	17,143,896
Outgoing	1,047,125	2,570,270	3,617,395

Source: RURA, operators' returns, June 2019

During this quarter, the total volume of minutes generated by foreigners roaming in Rwanda was 17.1 million minutes whereas the total minutes generated by Rwanda mobile networks' subscribers roamed outside the country was 3.6 million minutes.

Table 9: SMS traffic (in numbers) as of June 2019

Destination	MTN Rwanda Ltd	Airtel/Tigo Rwanda Ltd	Total
Outgoing			
On net	446,335,002	129,566,339	575,901,341
Off net	2,204,044	3,777,638	5,981,682
International	484,386	136,046	620,432
Incoming SMS			
Off net	4,640,034	47,531	4,687,565
International	435,935	5,789	441,724

Source: Operators' reports, June 2019

The total volume of SMS traffic originating from mobile networks was 575.9 million SMS, the total SMS traffic originating from own mobile networks to other mobile networks was 5.9 million, and the total SMS traffic from mobile networks to international networks was 0.6 million.

5. INTERNET SERVICE PROVISION

5.1. Internet subscriptions

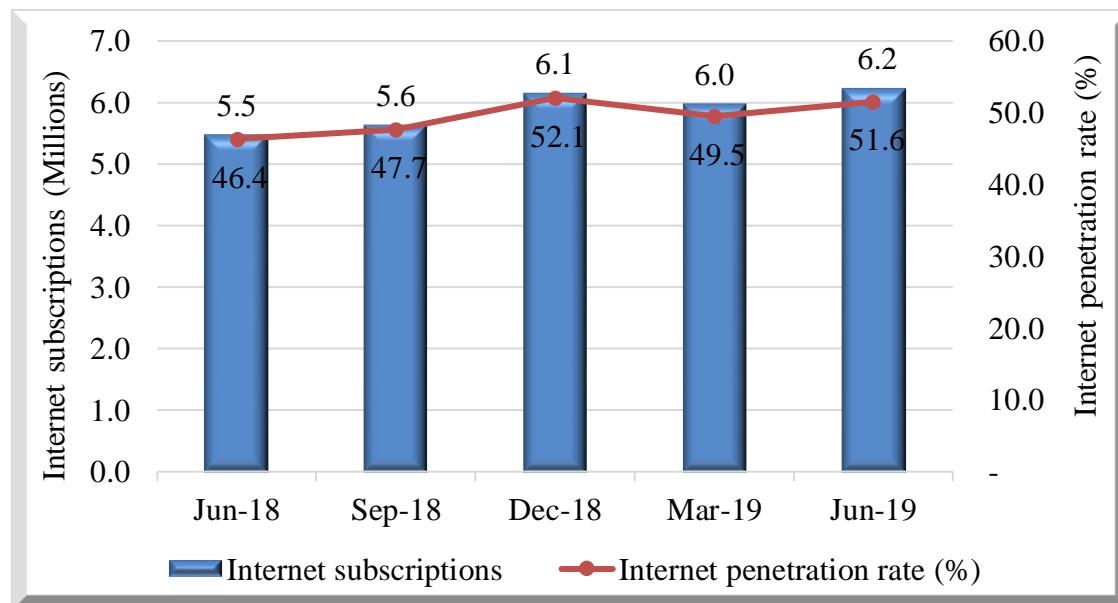
The total internet subscriptions stood at 6.2 million recorded at the end of the second quarter of the year 2019. The table below illustrates the number of internet subscribers per operator.

Table 10: Internet subscriptions per category as of June 2019

Operators	Fixed internet		Mobile internet			Total internet subscribers
	Narrowband (≤256kbps)	Broadband (≥256kbps)	EDGE&GPRS	3G	4G	
MTN Rwanda ltd	103	1,816	2,838,632	932,601	5,886	3,779,038
Airtel/Tigo Rwanda ltd		1,079	1,860,840	518,178	35,146	2,415,243
Axiom Networks ltd		250			6	256
4NetAfrica Ltd		3			519	522
BCS Ltd		7				7
BSC Ltd		2,381			10,094	12,475
Liquid Telecom ltd		2,051				2,051
CBNET Ltd		4			807	811
G-Max Ltd		10			470	480
ISCO ISP Ltd		9			551	560
NET LINK LTD		1			236	237
Piramie INC					782	782
Simba Supermarket					340	340
Truconnect		20			628	648
BK Techouse		20			550	570
Fastnet		9			2,628	2,637
ISPA Ltd		162				162
Mango Telecom Ltd		4			9,785	9,789
POPCONN Ltd		4			4,160	4,164
RTN					522	522
AC Group Ltd					415	415
Smart Broadband Ltd		2			159	161
SUKU NSA Ltd		45				45
TNSP		15			2,023	2,038
NETPRO LTD					567	567
Total	103	7,892	4,699,472	1,450,779	76,274	6,234,520

Source: Operators' reports, June 2019

Figure 7: Trend of internet subscriptions and penetration rate as of June 2019



Source: Operators' reports, June 2019

During this quarter under review, the number of internet subscriptions increased by 4.2 percent to reach 6.2 million from 6.0 million recorded in the previous quarter. The internet subscriptions per 100 inhabitants at the end of June 2019 was 51.6 percent.

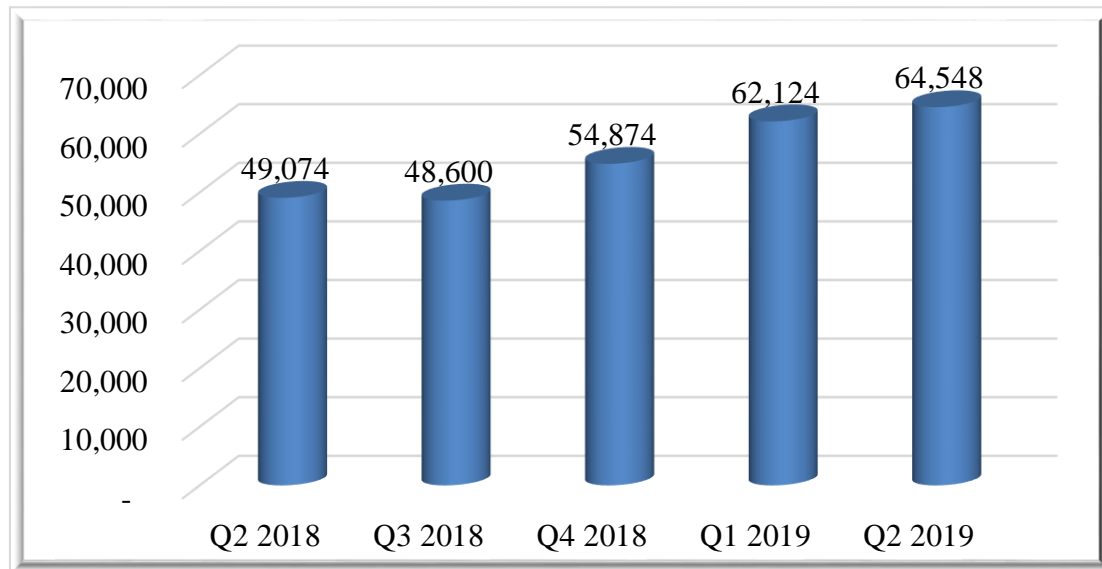
5.2. International internet bandwidth

Table 11: International internet bandwidth (Mbps) per operator as of June 2019

Name of operator	UP Link	Down Link
MTN Rwanda Ltd	7,473	7,473
Liquid Telecom Ltd	40,000	40,000
Airtel/Tigo Rwanda Ltd	5,900	5,900
ISPA Ltd	250	250
BSC Ltd	5,415	5,415
KTRN Ltd	3,860	3,860
Axiom Networks Ltd	1,650	1,650
Total	64,548	64,548

Source: Operators' reports, June 2019

Figure 8: Trend of equipped international internet bandwidth (Mbps) from June 2018 to June 2019

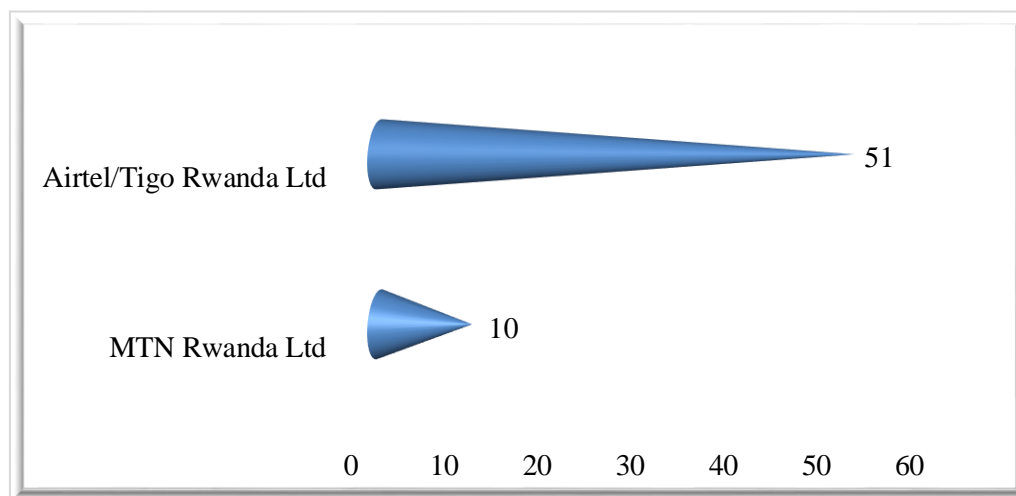


Source: Operators' reports, June 2019

During the quarter under review, the total equipped international internet bandwidth available in the country increased to 64,548 Mbps from 62,124 Mbps reported at the end of the first quarter of 2019.

5.3. Mobile internet tariff

Figure 9: Standard mobile internet tariff (Rwf/MB) as of June 2019



Source: Operators' reports, June 2019

Table 12: Trend of telecom revenues (Rwf) as of the second quarter 2019

Category	Q1 2019	Q2 2019
Total MNOs Revenues and Liquid Revenues	43,863,982,018	42,653,124,423
Total ISPs , 4G retailers and wholesale Network Service Provider	8,248,869,214	9,454,298,445
Total	52,112,851,233	52,107,422,868

Source: Operators' reports, June 2019

Table 13: Trend of telecom investment made in the first two quarters of year 2019

Category	Q1 2019	Q2 2019
Total MNOs Revenues and Liquid investment	12,482,904,828	3,959,719,171
Total ISPs , 4G retailers and wholesale Network Service Provider	1,266,464,902	833,518,733
Total	13,749,369,731	4,793,237,904

Source: Operators' reports, June 2019

6. EMPLOYMENT IN TELECOMMUNICATION SECTOR

The nine hundred fifty-seven (957) persons were employed in telecommunication sector during this quarter under review, eight hundred fifty-eight (858) are permanent staffs while ninety-nine (99) are temporary staffs. The table below illustrates the number of persons employed by operator.

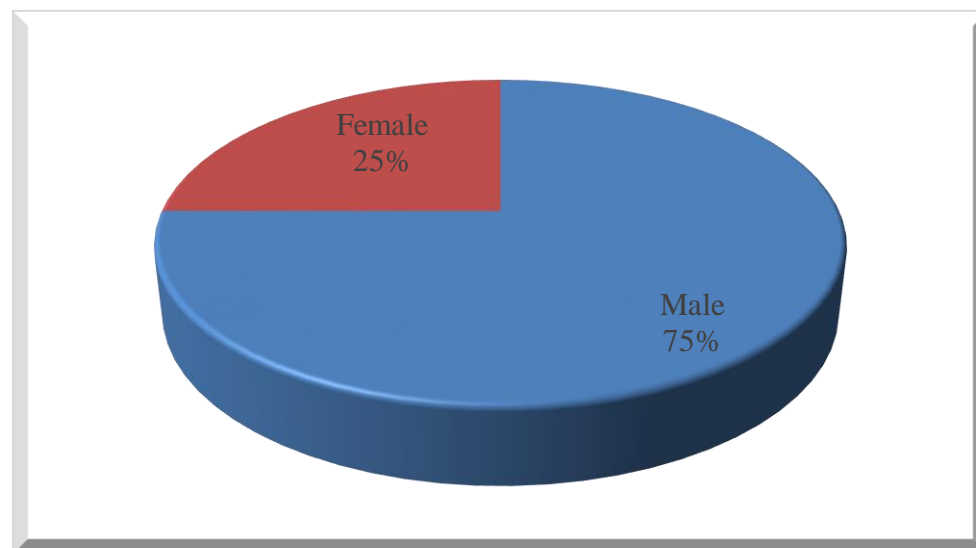
Table 14: Number of staffs employed in telecommunication sectors as of June 2019

Operator	Type of contract			Gender		Domestic and foreign employees	
	Temporary	Permanent	Total staff	Female	Male	Domestic	Foreign
MTN Rwanda Ltd	9	275	284	88	196	276	8
Airtel/Tigo Rwanda Ltd	0	128	128	20	108	119	9
Liquid Telecom Ltd	17	58	75	10	65	71	4
ISPA Ltd	0	17	17	5	12	17	0
G-MAX	0	5	5	2	3	5	0
Truconnect	0	4	4	2	2	4	0
Axiom Networks Ltd	0	31	31	10	21	29	2
4NetAfrica Ltd	6	4	10	3	7	10	0
TNSP	27	19	46	4	42	46	0
KTRN Ltd	6	113	119	28	91	116	3
Piramie INC	4	1	5	2	3	3	2
POPCONN Ltd	0	16	16	4	12	14	2
BSC Ltd	17	48	65	16	49	65	0
BCS Ltd	0	1	1	0	1	1	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	3	3	0	3	3	0
BK Techouse	2	15	17	3	14	17	0
Mango Telecom Ltd	0	39	39	11	28	35	4
NET LINK LTD	0	8	8	3	5	8	0
CBNET Ltd	2	1	3	1	2	3	0
RTN	0	18	18	7	11	18	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
Total	99	858	957	239	718	923	34

Source: Operators' reports, June 2019

The two hundred thirty-nine (239) staffs representing 25 percent of the total staffs are female whereas 75 percent are male as it is shown in the figure below.

Figure 10: Staffs by gender as of June 2019



Source: Operators' reports, June 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 second quarter of the year 2019.

Table 15: Licensed media operators from March 2018 to March 2019

Category	Jun-2018	Sep-2018	Dec-2018	Mar-2019	Jun-2019
Signal distributors	2	2	2	2	2
Pay TV operators	4	4	4	4	4
FM Radio stations	34	34	34	34	34
Television stations	12	13	13	14	21
Online media houses	23	23	23	23	23
Print media houses	28	28	28	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, four (4) pay TV operators, thirty-four (34) FM radio stations, twenty-one (21) television stations, twenty-three (23) online media houses, thirty (30) print media houses, and three (3) international media houses.

Table 16: Number of Pay TV subscribers as of June 2019

Name of Pay TV	Active Subscribers	Registered Subscribers
Azam Media Ltd	6,329	12,968
Star Africa Media Ltd	41,000	241,000
Tele 10 Ltd	16,210	26,108
Kwesé Support Services Rwanda Ltd	422	1,015
Total	63,961	281,091

Source: Operators' reports, June 2019

The total number of active subscribers was 63,961 recorded in the second quarter of the year 2019 whereas registered subscribers were 281,091.

Table 17: Trend of decoders sold from March 2018 to March 2019

Number of Decoders Sold	Q2 2018	Q3 2018	Q4 2018	Q1 2019	Q2 2019
Azam Media Ltd	408	0	474	586	795
Star Africa Media Ltd	4,008	1,609	2,582	3,085	2,370
Tele 10 Ltd	651	574	583	730	373
Kwesé Support Services Rwanda Ltd	66	47	34	2	0
Total	5,133	2,230	3,673	4,403	3,538

Source: Operators' reports, June 2019

During this quarter under review, the total number of decoders sold decreased by 19.6 percent to reach 3,538 from 4,403 recorded in the first quarter of the year 2019.

Table 18: Number of staffs employed in Pay TV operators as of June 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	4	79	83	23	60	78	5
Tele 10 Ltd	0	29	29	9	20	29	0
Kwesé Support Services Rwanda Ltd	0	3	3	0	3	3	0
Total	4	133	137	38	99	131	6

Source: Operators' reports, June 2019

The total number of staffs employed by Pay TV operators as of June 2019 was 137 of which 60.6% are employed by Star Africa Media Ltd, by 21.2% Tele 10 Ltd, 16.1% are employed by Azam Media Ltd, and 2.2% are employed by Kwesé Support Services Rwanda Ltd. The 38 staffs representing 27.7 % 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, international in-bound courier license and intra-city courier license.

Table 19: Licensed postal and courier operators as of June 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