

**STATISTICS REPORT FOR TELECOM, MEDIA AND  
BROADCASTING SECTOR AS OF THE THIRD  
QUARTER (JULY-SEPTEMBER) OF THE YEAR 2022**

**Disclaimer:** Information provided in this report is subject to alteration in case of any revision or update 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 starting from 1<sup>st</sup> July to 30<sup>th</sup> September 2022.

**Table 1: Key ICT indicators**

INDICATORS	Q2 2022	Q3 2022	% change between Q2-22 and Q3-22
<b>SUBSCRIPTIONS</b>			
Mobile subscriptions	10,575,038	10,871,158	2.80
Fixed subscriptions	11,462	11,305	-1.37
Mobile (SIM) penetration rate (%)	80.70	82.49	2.22
Fixed telephone penetration rate (%)	0.087	0.086	-1.93
<b>VOICE TRAFFIC IN MINUTES</b>			
On-Net Voice Traffic	6,149,973,301	6,490,444,980	5.54
Outgoing Off-Net Voice Traffic	880,578,282	1,636,543,118	85.85
International Outgoing mobile voice traffic	7,530,323	6,852,038	-9.01
International Incoming mobile voice traffic	23,800,624	24,593,555	3.33
<b>ROAMING SUBSCRIBERS</b>			
Roaming-in (Foreign subscribers)	1,724,407	1,605,480	-6.90
Roaming-Out (Own subscribers)	969,644	1,150,719	18.67
<b>ROAMING TRAFFIC</b>			
Total incoming minutes for roamers	50,740,403	75,206,339	48.22
Total outgoing minutes for roamers	2,689,740	2,773,447	3.11
<b>SMS TRAFFIC</b>			
On-net SMS	951,160,601	824,284,609	-13.34
Outgoing Off-net SMS	47,686,418	57,277,332	20.11
Outgoing International SMS	860,459	1,094,313	27.18
Incoming International SMS	1,558,754	1,895,007	21.57
<b>DATA/INTERNET</b>			
Internet subscriptions	7,943,420	8,264,794	4.05
Internet subscriptions per 100 inhabitants	60.6	62.7	3.46
Equipped international internet bandwidth (Mbps)	173,649	178,032	2.52
Used international internet bandwidth (Mbps)	94,705	90,234	-4.72
<b>MEDIA AND BROADCASTING</b>			
Number of Television stations	21	19	-9.52
Number of Radio FM stations	30	29	-3.33
Active Pay TV subscribers	81,500	85,486	4.89
Registered Pay TV subscribers	378,995	418,978	10.55

**Source: Operators' reports**

## 1. MOBILE TELEPHONE SERVICES

### 1.1. Mobile subscriptions

During the third quarter of the year 2022, the operators providing mobile telephone services were MTN Rwanda Ltd and Airtel Rwanda Ltd. The number of active mobile subscriptions reported at the end of September 2022 were 10,871,158 SIM cards. The Table 2 shows the comparison of active mobile subscriptions per operator.

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

Name of operator	September 2021			September 2022			Quarterly Variation
	Postpaid	Prepaid	Total	Postpaid	Prepaid	Total	
MTN Rwanda Ltd	109,102	6,851,218	6,960,320	136,086	6,979,379	7,115,465	<b>2.23%</b>
Airtel Rwanda Ltd	4,893	4,067,477	4,072,370	7,395	3,748,298	3,755,693	<b>-7.78%</b>
<b>Total</b>	<b>113,995</b>	<b>10,918,695</b>	<b>11,032,690</b>	<b>143,481</b>	<b>10,727,677</b>	<b>10,871,158</b>	<b>-1.46%</b>

**Source: Operators' reports**

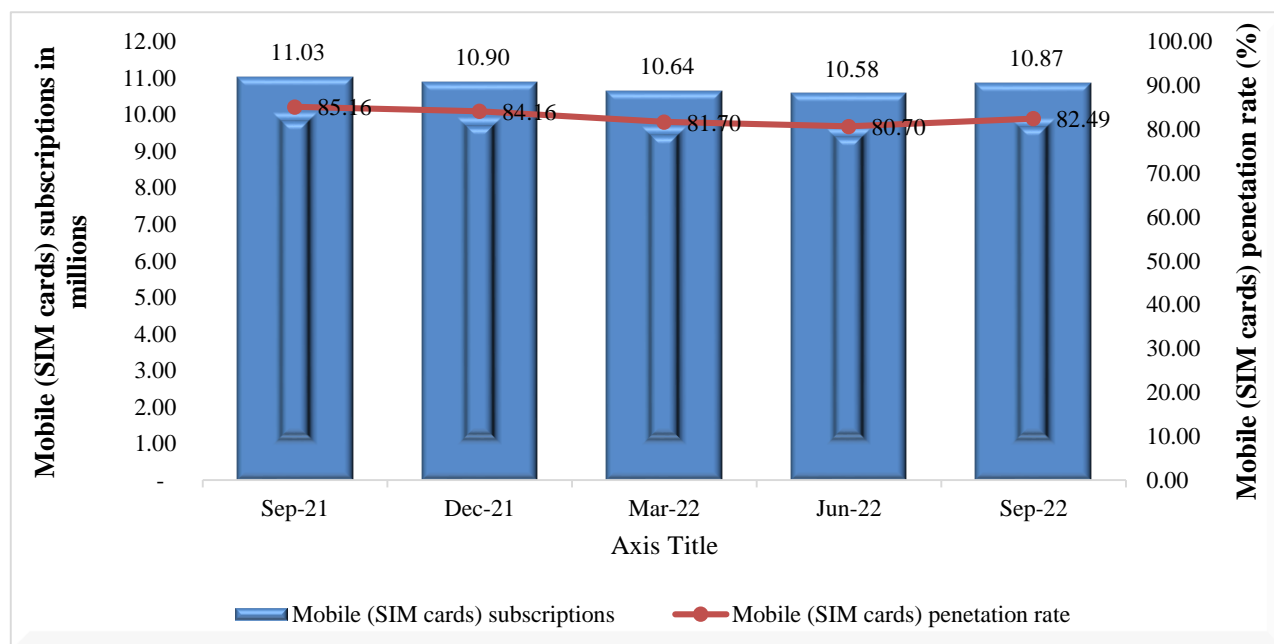
As of September 2022, the number of active mobile subscriptions in the country decreased to 10.87 million from 11.03 million active SIM cards reported at the end of September 2021. The active mobile-cellular telephone (SIM cards) subscriptions per 100 people have also decreased from 85.16% reported at the end of September 2021 to 82.49% as of September 2022.

The Figure 1 displays the trends of active mobile subscriptions and penetration rates.

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<sup>1</sup> Active mobile subscriptions refer to the number of SIM cards which generated revenues to the operator within 90 days.

**Figure 1: Trend of mobile subscriptions and penetration rate<sup>2</sup> from Q3 2021 to Q3 2022**

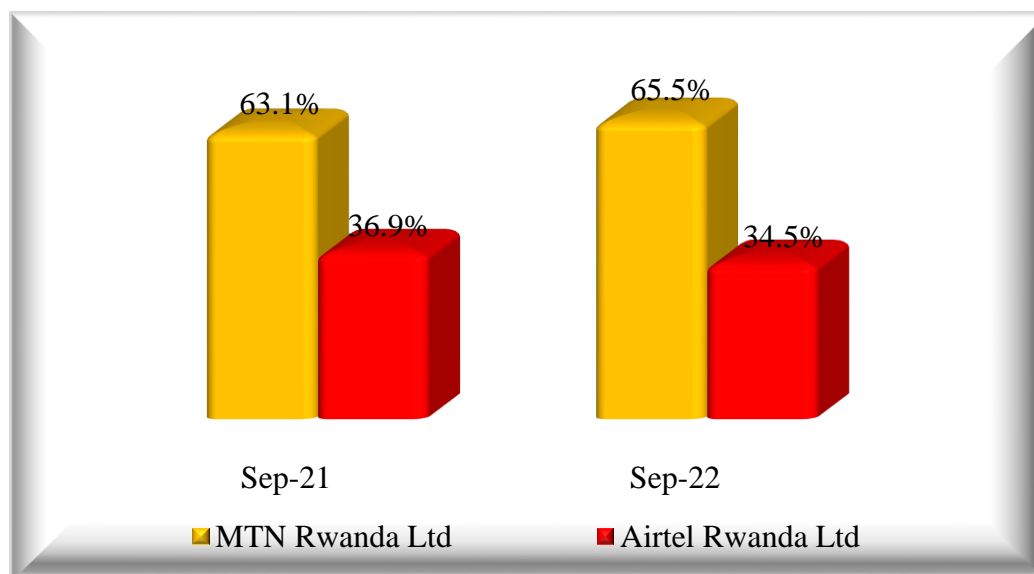


**Source: Operators' reports**

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

As of September 2022, the market shares in terms of active SIM cards for MTN Rwanda Ltd increased by 2.4 percentage points up to 65.5% whereas that for Airtel Rwanda Ltd dropped by the same margin reaching 34.5% compared to September 2021 publications.

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



**Source: Operators' reports**

<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 quarter 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, 90 Frw/Min in One Area Network Countries, and 51 Frw/Min to call in US, Canada, China, and India.

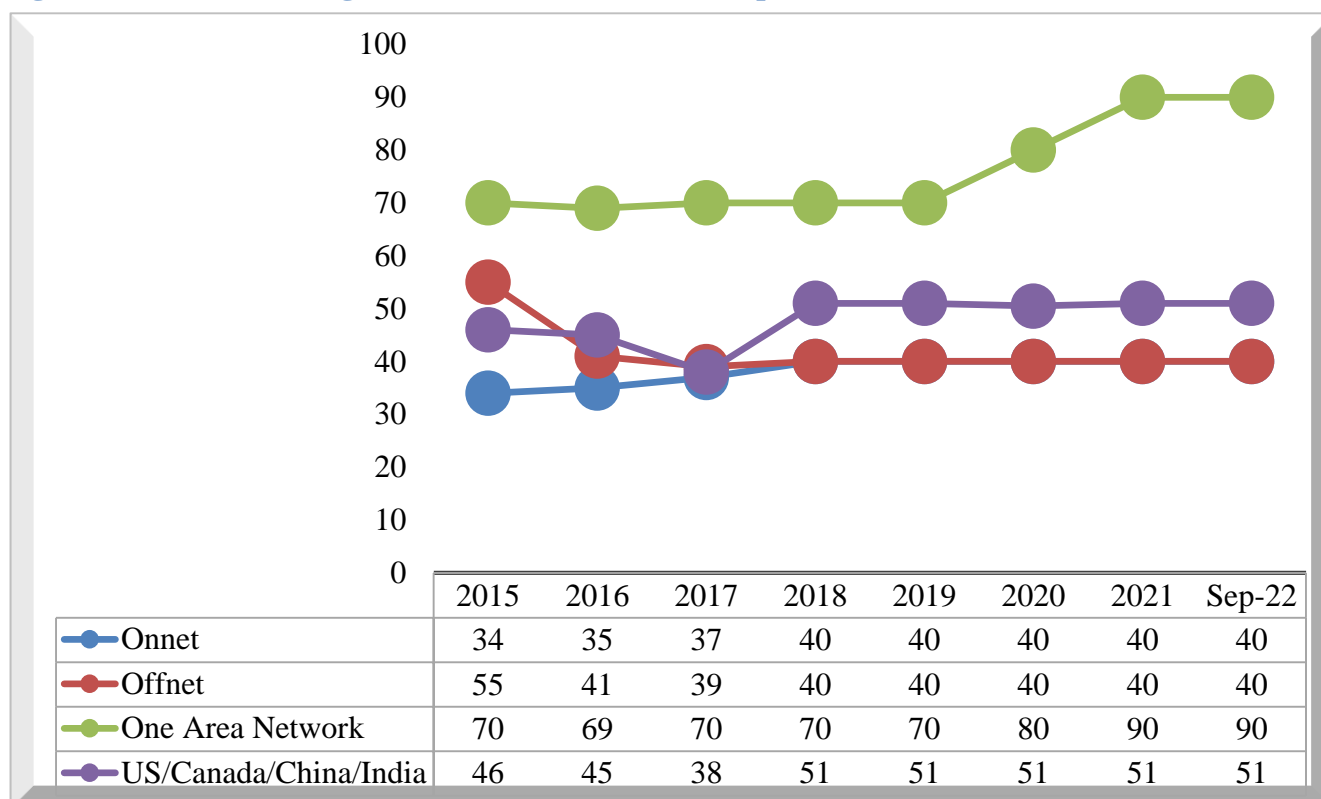
**Table 3: Mobile telephone voice tariff (in Frw) per minute per operator as of September 2022**

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Average
Onnet	45	35	<b>40</b>
Offnet	45	35	<b>40</b>
One Area Network	90	90	<b>90</b>
US/Canada/China/India	51	51	<b>51</b>

Source: Operators' reports

In the third quarter 2022, 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 was 40 Frw/Min, 40 Frw/Min, and 51 Frw/Min respectively. The standard average voice tariff for calling in One Area Network Countries was 90 Frw/min.

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



Source: Operators' reports



During the third quarter 2022, the average tariff for sending a message within a telecom operator, between telecom operators, in ONA countries, and international was 8.5 Frw, 20.5 Frw, 42.5 Frw, and 79.5 respectively. A subscriber on Airtel Rwanda's network can send a short text message to its Africa sister companies' subscribers at 26 Frw.

**Table 4: SMS tariff structure (in Frw) as of September 2022**

<b>SMS Tariff</b>	<b>MTN Rwanda Ltd</b>	<b>Airtel Rwanda Ltd</b>	<b>Average</b>
Onnet tariff	12	5	<b>8.5</b>
Offnet tariff	26	15	<b>20.5</b>
ONA	45	40	<b>42.5</b>
Rest of the World	80	79	<b>79.5</b>

**Source: Operators' reports**

## **1.4. Mobile traffic statistics**

### **1.4.1. Mobile outgoing and incoming international voice traffic**

In the third quarter of 2022, the total volume of minutes originating within mobile networks were 6.4 billion minutes, the total minutes originating from mobile networks to other domestic networks were 1.6 billion minutes, and the total minutes from mobile networks to international networks were 6.8 million minutes. The number of minutes from international networks to local mobile networks were 24.5 million minutes.

**Table 5: Outgoing and incoming traffic per operator as of the 3<sup>rd</sup> quarter 2022**

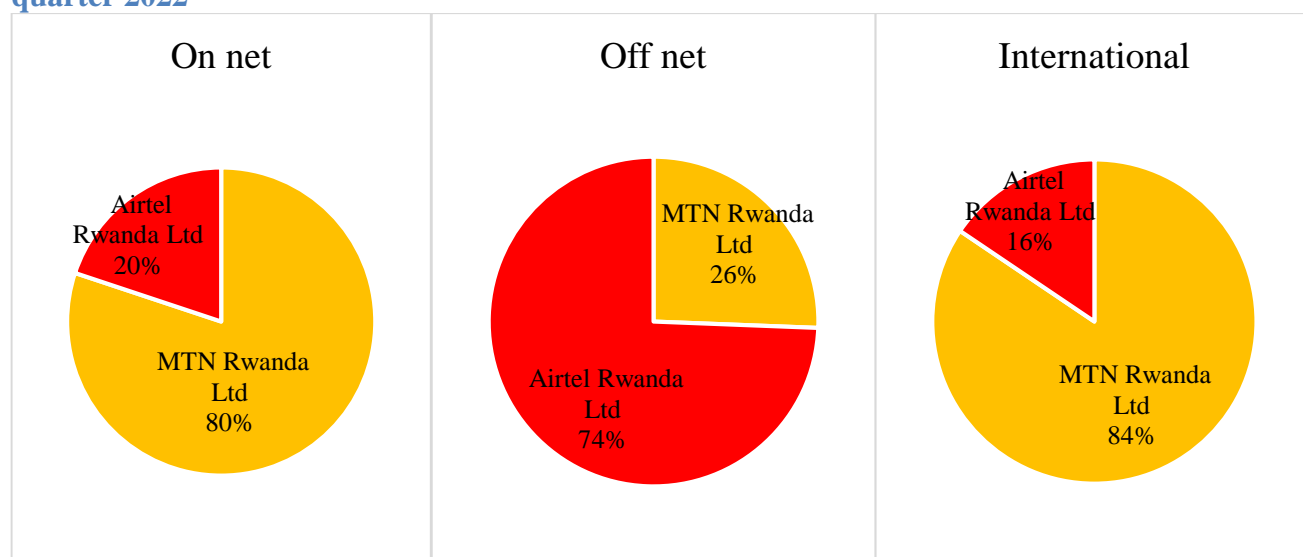
<b>Voice traffic</b>	<b>MTN Rwanda Ltd</b>	<b>Airtel Rwanda Ltd</b>	<b>Total</b>
<b>Outgoing minutes</b>			
On net	5,198,669,057	1,291,185,335	<b>6,489,854,392</b>
Off net	419,095,121	1,217,028,028	<b>1,636,123,149</b>
International	5,760,371	1,061,106	<b>6,821,477</b>
<b>Incoming minutes</b>			
International	10,209,863	14,366,960	<b>24,576,823</b>

**Source: Operators' reports**

### 1.4.2. Market shares for mobile outgoing voice traffic

During the 3<sup>rd</sup> quarter 2022, the 80% of the total on net minutes generated by mobile networks were from MTN Rwanda Ltd and 20% from Airtel Rwanda Ltd. The off-net minutes 'market shares for MTN Rwanda Ltd and Airtel Rwanda Ltd were 26% and 74% respectively. The 84% of minutes from local mobile networks to international networks were generated by MTN Rwanda Ltd whereas the remaining 16% were for Airtel Rwanda Ltd.

**Figure 4: Outgoing on net, off net and international voice traffic's market share as of the 3<sup>rd</sup> quarter 2022**



Source: Operators' reports

### 1.4.3. Average calling time (Minutes/call)

In the third quarter 2022, the average minutes per call within mobile telecom networks were 2.3, average minutes per call to call other domestic networks were 2.1 while the average minutes per call from Rwanda mobile networks to international networks were 2.6. The average minutes per call from international networks to Rwanda mobile networks were 2.9.

**Table 6: Average minutes per call per operator in the 3<sup>rd</sup> quarter 2022**

Voice traffic	MTN Rwanda Ltd	Airtel Rwanda Ltd	Combined
Average outgoing minutes per call			
On net	2.3	2.4	<b>2.3</b>
Off net	1.7	2.2	<b>2.1</b>
International	2.8	1.9	<b>2.6</b>
Average incoming minutes per call			
International	1.9	4.6	<b>2.9</b>

Source: Operators' reports

#### 1.4.4. Outgoing and incoming international SMS traffic

During the third quarter 2022, the total volume of SMS traffic originating within mobile networks were 824.2 million SMS, the total SMS traffic originating from mobile networks to other mobile networks were 57.2 million SMS and the total SMS traffic from mobile networks to international networks were 1.0 million SMS. The number of SMS from international networks to Rwanda were 1.8 million SMS.

**Table 7: SMS traffic (in numbers) as of the third quarter 2022**

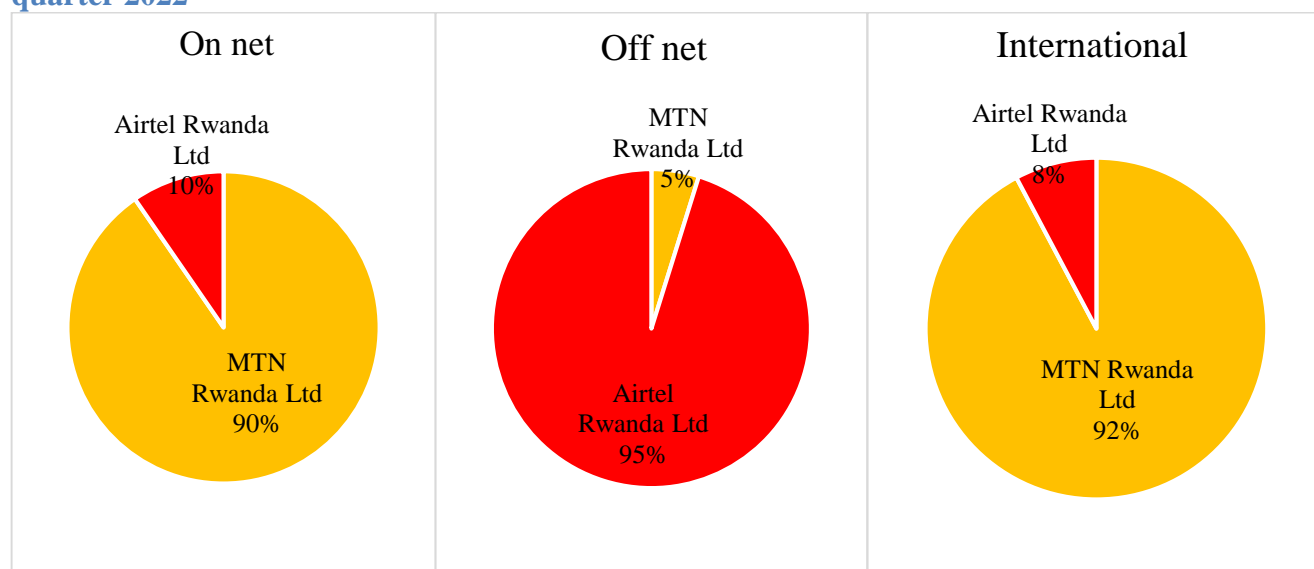
Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Outgoing SMS			
On net	745,050,669	79,233,940	<b>824,284,609</b>
Off net	2,758,545	54,518,787	<b>57,277,332</b>
International	1,009,412	84,901	<b>1,094,313</b>
Incoming SMS			
International	559,653	1,335,354	<b>1,895,007</b>

Source: Operators' reports

#### 1.4.5. Market shares for outgoing on net, off net and international SMS traffic

During the third quarter 2022, the 90% of the total on net SMS were for MTN Rwanda Ltd and 10% of Airtel Rwanda Ltd. The 95% of off net SMS were for Airtel Rwanda Ltd and the 5% of MTN Rwanda Ltd. The 92% and 8% of SMS from local mobile networks to international networks are generated by MTN Rwanda Ltd and Airtel Rwanda Ltd respectively.

**Figure 5: Outgoing on net, off net and international SMS traffic market share as of the third quarter 2022**



Source: Operators' reports

## 2. ROAMING

### 2.1. Roaming subscribers

The international roaming subscribers during the third quarter of the year 2022 stood at 1.6 million foreign subscribers roamed on local networks whereas 1.1 million Rwanda subscribers roamed on foreign networks.

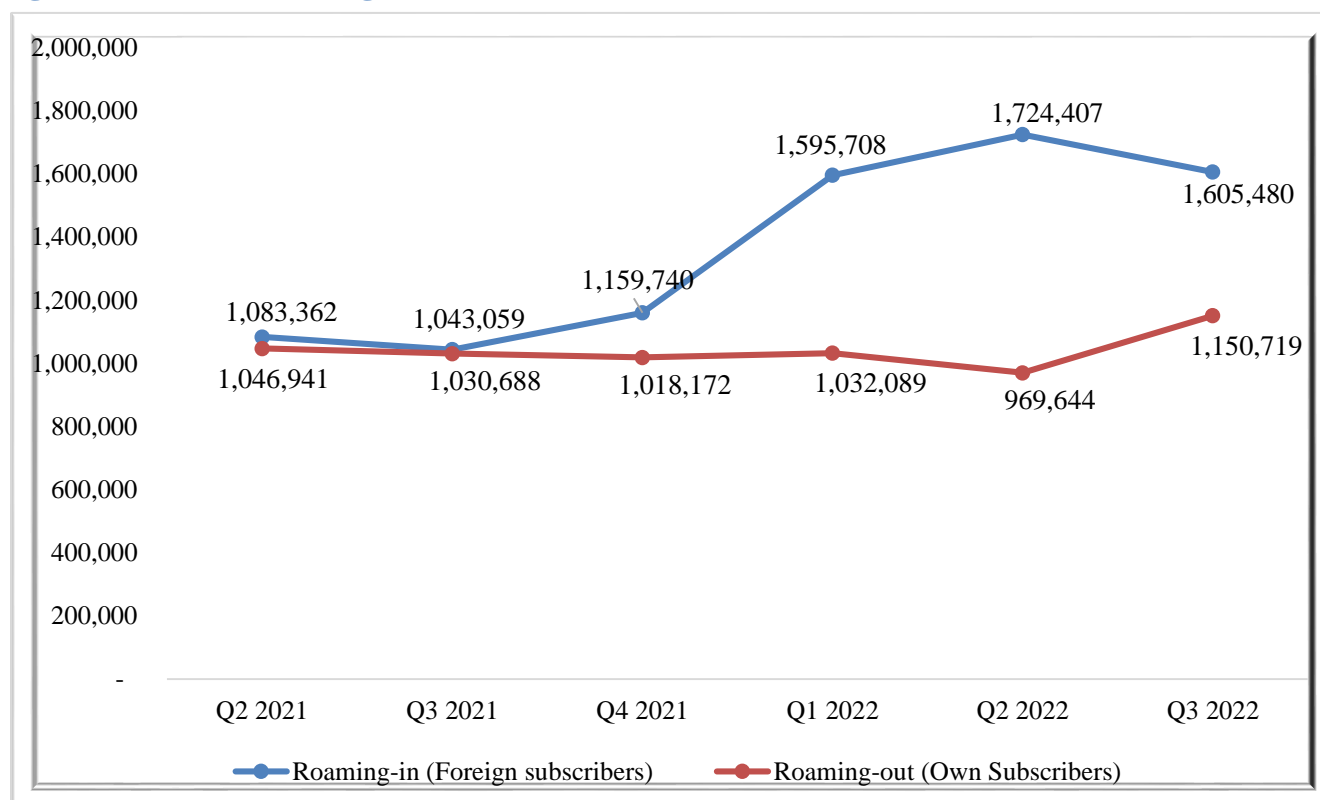
**Table 8: International roaming subscribers as of the third quarter 2022**

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Total
Roaming-in (Foreign subscribers)	798,282	807,198	1,605,480
Roaming-out (Own Subscribers)	877,995	272,724	1,150,719

Source: Operators' reports

In the third quarter 2022, the number of roamers-out increased to 1,150,719 from 969,644 subscribers representing an increase of 18.7% whereas the number of roamers-in decreased up to 1,605,480 from 1,724,407 subscribers recorded during the previous quarter, which is equivalent to 6.9%.

**Figure 6: Trend of roaming subscribers from Q2 2021 to Q3 2022**



Source: Operators' reports

## 2.2. Roaming traffic

During the third quarter 2022, the total volume of outgoing traffic generated by foreign subscribers roaming in Rwanda was 1.3 million minutes and the total minutes generated by Rwanda mobile networks' subscribers roamed outside the country was 1.4 million minutes. On the other hand, the total incoming traffic on foreign subscribers roamed in Rwanda was 18.0 million minutes whereas the incoming minutes to Rwanda subscribers roamed on foreign networks was 57.1 million.

**Table 9: Outgoing and incoming roaming traffic (in minutes) per operator as of the third quarter 2022**

Destination	Foreign subscribers roaming on local networks			Own subscribers roaming on foreign networks		
	MTN	Airtel	Total	MTN	Airtel	Total
Incoming	2,837,173	15,169,434	18,006,606	55,379,381	1,820,352	57,199,733
Outgoing	877,920	493,235	1,371,155	1,350,338	51,954	1,402,291
<b>Total</b>	<b>3,715,093</b>	<b>15,662,669</b>	<b>19,377,762</b>	<b>56,729,719</b>	<b>1,872,306</b>	<b>58,602,024</b>

Source: Operators' reports

## 3. FIXED TELEPHONE SERVICES

### 3.1. Fixed telephone subscriptions

During the third quarter 2022, 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 September 2022**

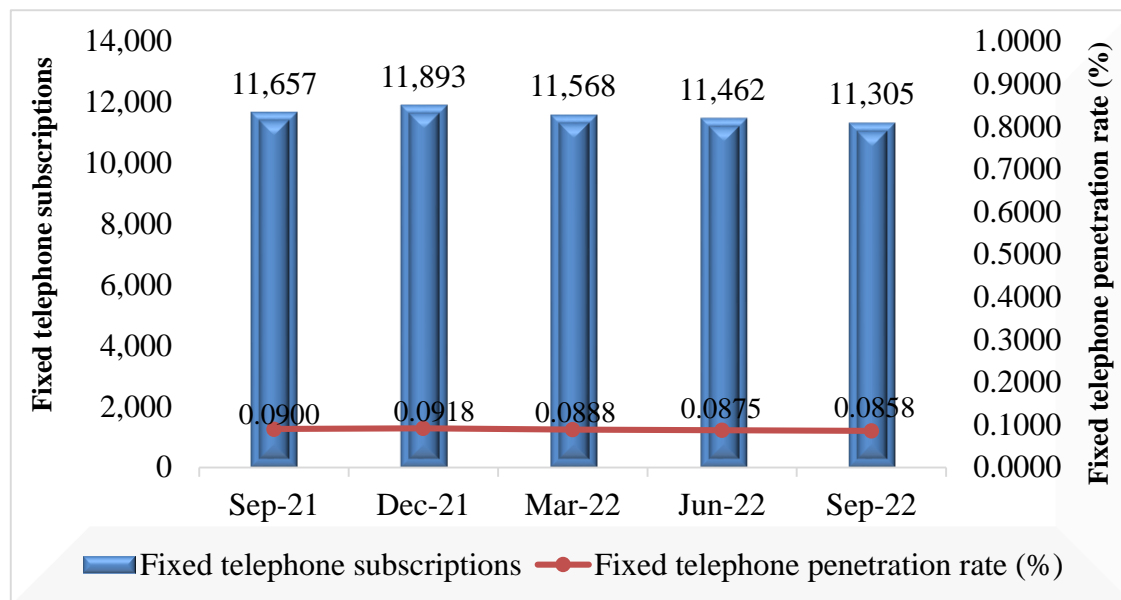
Name of Operator	Fixed telephone subscriptions	Fixed telephone penetration rate (%) <sup>3</sup>
MTN Rwanda Ltd	168	<b>0.0858</b>
Airtel Rwanda Ltd	9,150	
Liquid Telecom Ltd	726	
BSC Ltd	1,261	
<b>Total</b>	<b>11,305</b>	

Source: Operators' reports

As of September 2022, the number of fixed telephone subscriptions decreased to 11,305 from 11,657 as of September 2021. The fixed telephone subscriptions per 100 people have also decreased up to 0.0858% from 0.0900% as of September 2021.

<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.

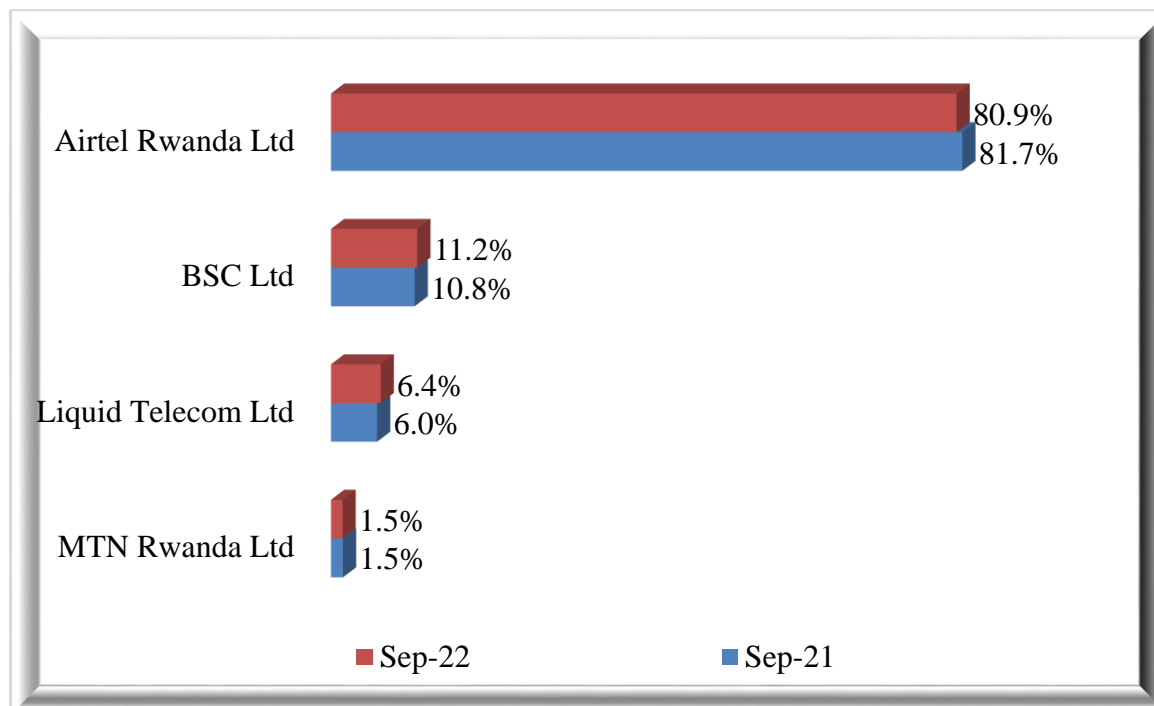
**Figure 7: Trend of fixed telephone subscriptions and penetration rate**



**Source: Operators' reports**

At the end of September 2022, the market shares in fixed telephone subscriptions for Airtel Rwanda Ltd decreased by 0.8 percentage points to 80.9%, and that for BSC Ltd increased by 0.4 percentage points to 11.2%. The market shares for Liquid Telecom Ltd increased by 0.4 percentage points to 6.4% and that for MTN Rwanda Ltd remained at 1.5% in comparison to the publications of the 3<sup>rd</sup> quarter of 2021.

**Figure 8: Market share trends for fixed telephone subscriptions per operator as of Sep-2022**



**Source: Operators' reports**

### 3.2. Fixed telephone traffic

During the 3<sup>rd</sup> quarter 2022, the total volume of minutes originating within operators by fixed telephone lines were 0.5 million minutes, the total minutes originating from one operator to other operators were 0.4 million minutes, and the total minutes from Rwanda fixed telephone lines to international networks were 30,561 minutes. The number of minutes from international networks to local fixed telephone lines were 16,731 minutes.

**Table 11: Outgoing mobile and fixed telephone incoming traffic as of 3<sup>rd</sup> quarter 2022**

Voice traffic	MTN Rwanda Ltd	Airtel Rwanda Ltd	Liquid Telecom Ltd	Total
<b>Outgoing minutes</b>				
On net	562,864	26,214	1,509	<b>590,587</b>
Off net	135,473	3,587	280,910	<b>419,970</b>
International	13,356	818	16,387	<b>30,561</b>
<b>Incoming minutes</b>				
International	15,538	1,193	368	<b>16,731</b>

Source: Operators' reports

### 3.3. Fixed telephone service tariff

During the 3<sup>rd</sup> quarter 2022, the average tariff for calling by fixed telephone within telecom operator was 30 Frw, while calling across telecom operators was 36.7 Frw, and 196.1 Frw to call in One Area Network Countries.

**Table 12: Fixed telephone service tariff structure (in Frw) per minute as of September 2022**

Destination	Liquid Telecom Ltd	MTN Rwanda Ltd	Airtel Rwanda Ltd	Average
On net	10	45	35	<b>30</b>
Off net	30	45	35	<b>36.7</b>
One Area Network	408.28	90	90	<b>196.1</b>

Source: Operators' reports

## 4. INTERNET SERVICE PROVISION

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

There were 8,224,654 active SIM cards subscribed to the internet within 90 days and 42,075 active fixed internet subscriptions recorded at the end of 3<sup>rd</sup> quarter of year 2022. The table below shows the internet subscriptions per operator per technology.

**Table 13: Internet subscriptions per category as of September 2022**

Name of operators	Fixed internet subscriptions		Mobile internet subscriptions			Total internet subscriptions
	Narrowband ( $\leq 256$ kbps)	Broadband ( $\geq 256$ kbps)	GPRS&EDGE	3G	4G	
MTN Rwanda Ltd	90	6,592	3,631,154	1,646,950	192,403	5,477,189
Airtel Rwanda Ltd		1,292	1,792,812	845,345	16,296	2,655,745
Axiom Networks Ltd		142				142
4NetAfrica Ltd		2			89	91
BSC Ltd		3,309			16,399	19,708
Liquid Telecom Ltd		13,407				11,472
CBNET Ltd		15			648	663
G-MAX Ltd		6			1,032	1,038
ISCO ISP Ltd		20			450	470
NET LINK Ltd		4			685	689
Piramie INC		1			744	745
Simba Supermarket					138	138
KOPA Telecom		48			5,675	5,723
BK Techouse		135			787	922
FASTNET		11			5,817	5,828
Mango Telecom Ltd		23			62,304	62,327
RTN Ltd					1,894	1,894
Smart Broadband Ltd		1			824	825
TNSP		17			914	931
NETPRO Ltd					1,294	1,294
GVA Rwanda		16,960				16,960
<b>Total</b>	<b>90</b>	<b>41,985</b>	<b>5,423,966</b>	<b>2,492,295</b>	<b>308,393</b>	<b>8,266,729</b>
<b>Penetration rate (%)</b>	<b>0.00</b>	<b>0.32</b>	<b>41.16</b>	<b>18.91</b>	<b>2.34</b>	<b>62.73</b>

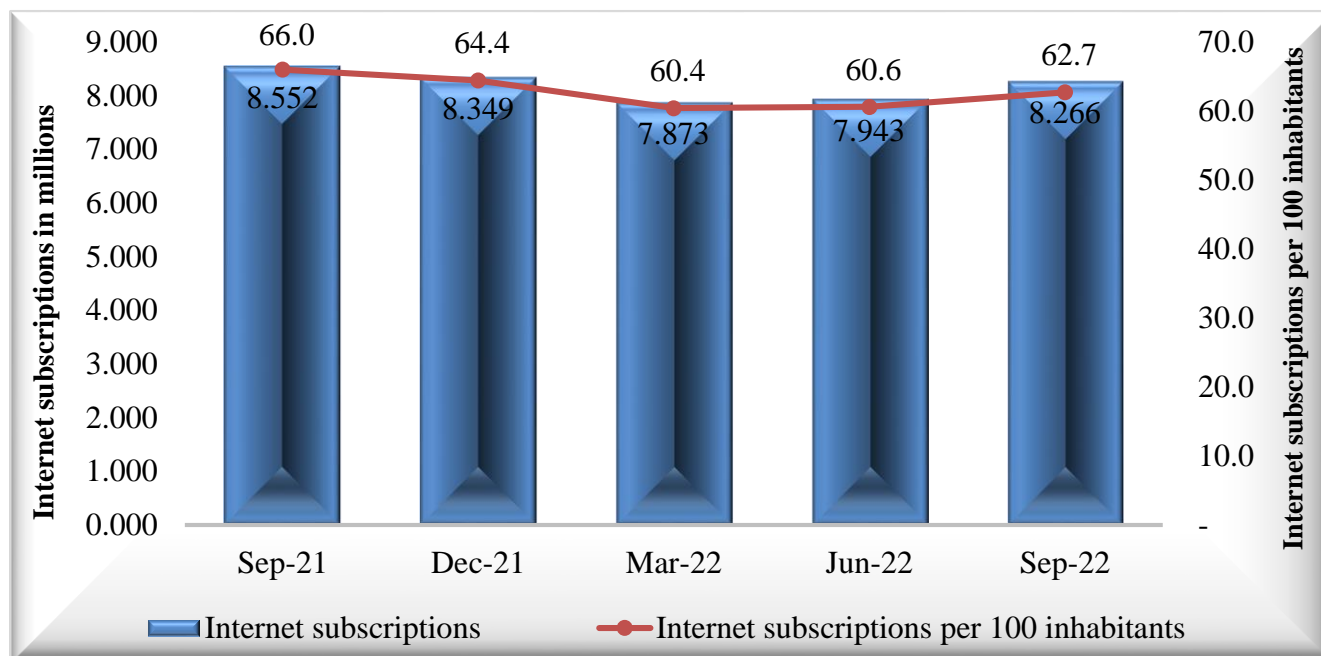
Source: Operators' reports

<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.



As of the end of 3<sup>rd</sup> quarter 2022, the total number of internet subscriptions dropped by 3.3% to reach 8.265 million from 8.552 million for the end of September 2021 whereas there was an increase of 4.1% compared to Q2 2022 publications. The internet subscriptions per 100 inhabitants for September 2022 increased by 2.1 percentage points to 62.7% in comparison to June 2022.

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



**Source: Operators' reports**

At the end of September 2022, the fixed internet subscriptions increased by 40.1% in comparison to the 3<sup>rd</sup> quarter 2021 publications. The 99.8% of total fixed internet subscriptions were subscribed to the speed greater or equal to 256 kbps whereas the 0.2% was below 256 kbps.

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

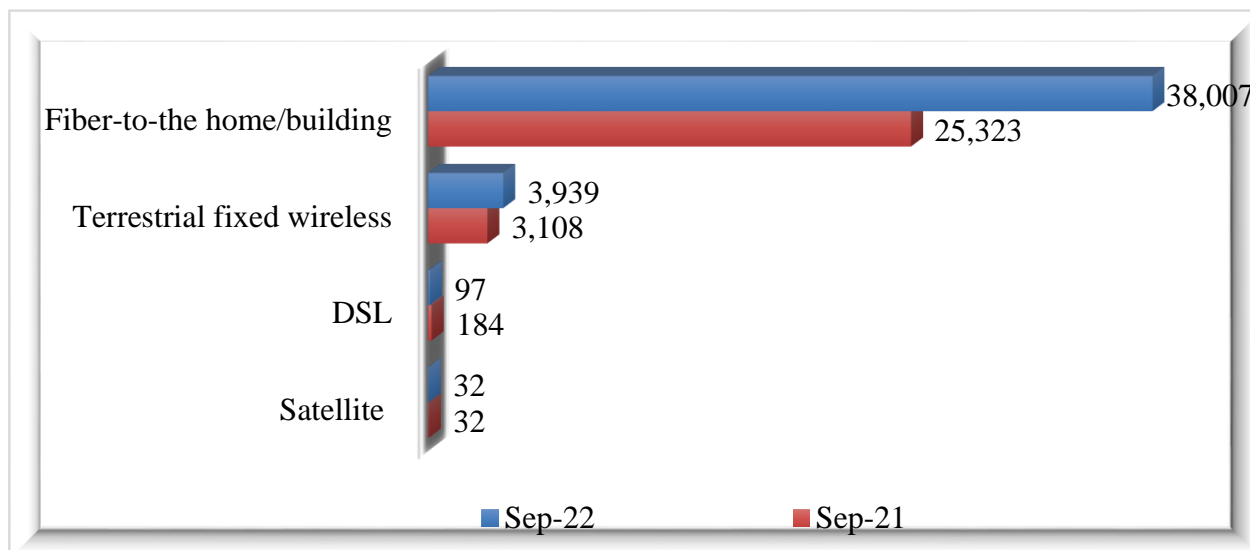
Speed	Fixed internet subscriptions	
	September 2021	September 2022
< 256 kbps	85	90
[256 kbps-2Mbps [	1,599	1,583
[2 Mbps -10 Mbps [	4,268	4,554
[10 Mbps-30Mbps [	18,820	26,319
[30 Mbps < 100Mbps [	3,667	8,787
≥ 100 Mbps	208	742
<b>Total</b>	<b>28,647</b>	<b>42,075</b>

**Source: Operators' reports**

<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.

In the 3<sup>rd</sup> quarter 2022, 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 as shown in the below figure.

**Figure 10: Fixed internet subscriptions by technology**

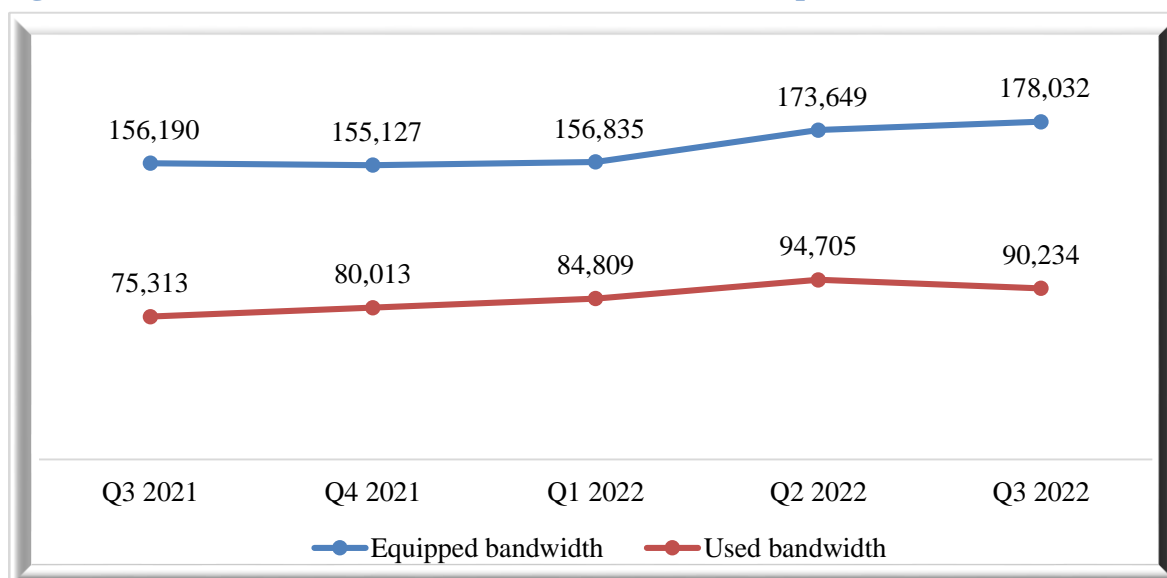


Source: Operators' reports

#### 4.2. International internet bandwidth

In the 3<sup>rd</sup> quarter 2022, the total equipped international internet bandwidth available in the country was 178,302 Mbps whereas the average used internet bandwidth was 90,234 Mbps.

**Figure 11: Trend of international internet bandwidth (Mbps) from Q3 2021 to Q3 2022**

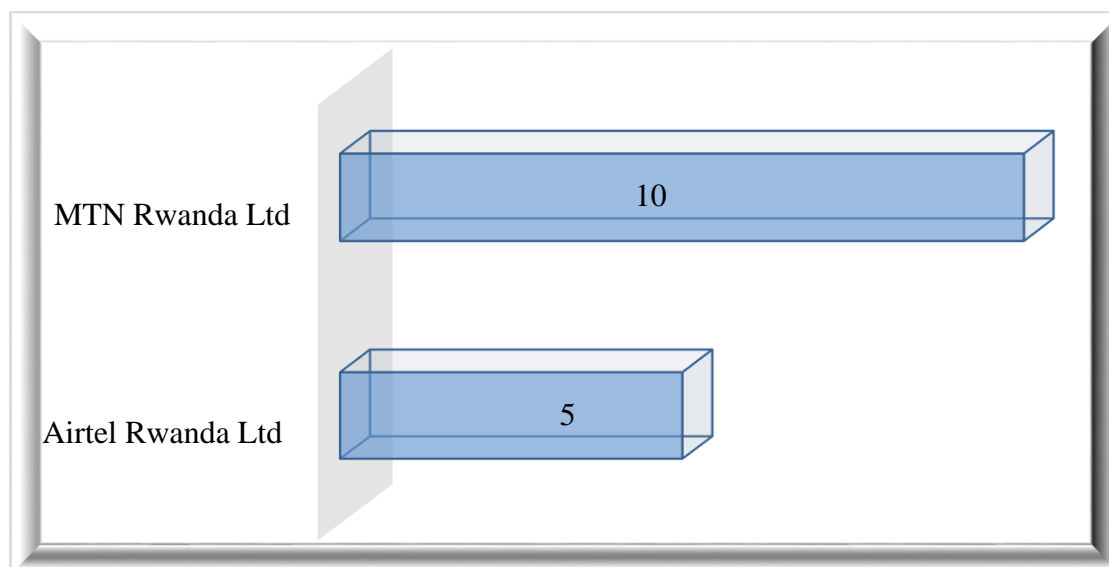


Source: Operators' reports

### 4.3. Mobile internet tariff

During the third quarter 2022, 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 September 2022**



Source: Operators' reports

## 5. EMPLOYMENT IN TELECOMMUNICATION SECTOR

One thousand one hundred eighty-seven (1,187) persons were employed in telecommunication sector at the end of September 2022; one thousand ninety-one (1,091) are permanent staff whereas ninety-six (96) are temporary staff. There were also seven hundred seventy-nine (779) outsourced staff employed by telecommunication sector. The table below illustrates the number of employed persons by operator.

**Table 15: Number of staff employed in telecommunication sectors as of September 2022**

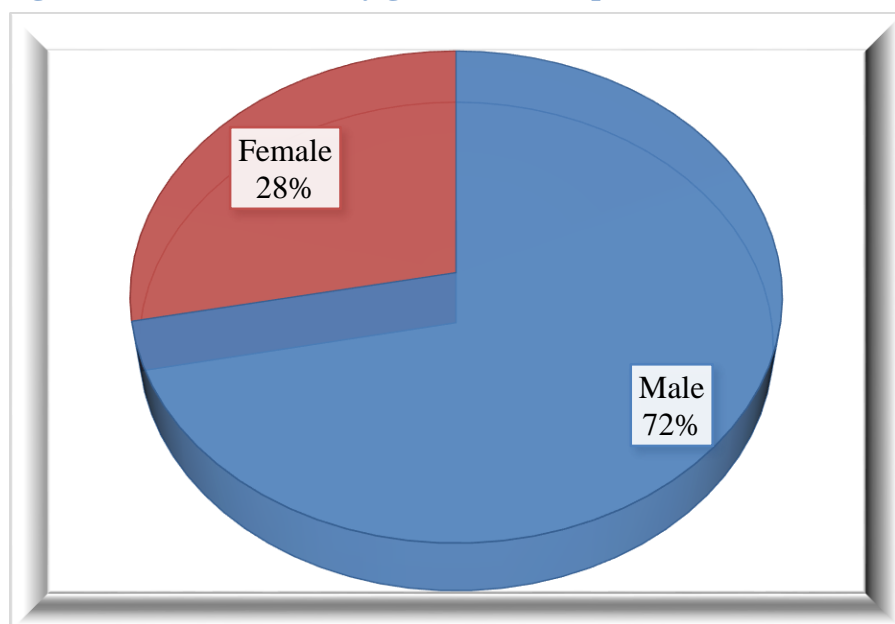
Operator	Type of contract			Gender		Domestic and foreign employees		Outsourced staff
	Temporary	Permanent	Total	Female	Male	Domestic	Foreign	
MTN Rwanda Ltd	7	323	330	108	222	324	6	482
Airtel Rwanda Ltd	0	118	118	16	102	115	3	204
Liquid Telecom Ltd	59	61	120	25	95	116	4	0
G-MAX	0	8	8	3	5	8	0	0
KOPA Telecom	1	18	19	5	14	19	0	0
Axiom Networks Ltd	1	25	26	8	18	24	2	0
4NetAfrica Ltd	0	1	1	0	1	1	0	0
TNSP	13	5	18	5	13	18	0	2

Operator	Type of contract			Gender		Domestic and foreign employees		Outsourced staff
	Temporary	Permanent	Total	Female	Male	Domestic	Foreign	
KTRN Ltd	1	113	114	20	94	111	3	0
Piramie INC	0	6	6	3	3	4	2	2
BSC Ltd	5	77	82	21	61	82	0	0
BCS Ltd	0	1	1	0	1	1	0	0
AC Group Ltd	0	38	38	10	28	38	0	0
FASTNET	1	9	10	3	7	10	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	6	43	49	9	40	48	1	0
Mango Telecom Ltd	0	143	143	68	75	142	1	0
NET LINK LTD	0	10	10	3	7	9	1	0
CBNET Ltd	2	1	3	1	2	3	0	0
RTN	0	19	19	6	13	19	0	0
Smart Broadband Ltd	0	4	4	0	4	4	0	0
NETPRO LTD	0	5	5	3	2	5	0	0
GVA Rwanda	0	58	58	16	42	57	1	87
<b>Total</b>	<b>96</b>	<b>1,091</b>	<b>1,187</b>	<b>334</b>	<b>853</b>	<b>1163</b>	<b>24</b>	<b>779</b>

Source: Operators' reports

The three hundred thirty-four (334) staff representing 28.1% of the total staff are female whereas 71.9% are male as shown in the figure below. The four hundred and three persons (403) representing 51.7% per cent of the total outsourced staff are female.

Figure 13: Telecom staff by gender as of September 2022



Source: Operators' reports

## 6. MEDIA AND BROADCASTING

The table below displays the cumulative number of licensed Television Stations, FM Radio Broadcasters, Online Media Houses, Pay TV operators, print media houses, International media houses, and Signal Distributors up to the end of September of the year 2022.

### 6.1. Licensed media operators

During the third quarter of 2022, there was one (1) licensed signal distributors, four (4) pay TV operators, twenty-nine (29) FM radio stations, nineteen (19) television stations, fourteen (14) online media houses, nine (9) print media houses, and two (2) international media houses.

**Table 16: Trends of Licensed media operators from September 2021 to September 2022**

Category	Sep-2021	Dec-2021	Mar-2022	June-22	Sep-2022
Signal distributors	1	1	1	1	1
Pay TV operators	4	4	4	4	4
FM Radio stations	30	31	30	30	29
Television stations	19	19	21	21	19
Online media houses	23	24	14	14	14
Print media houses	32	32	8	9	9
International media houses	3	3	2	2	2

Source: RURA database

### 6.2. Pay TV subscriptions

Registered Pay TV subscribers at the end of the third quarter 2022 were 418,978 whereas active subscribers were 85,486.

**Table 17: Number of Pay TV subscribers as of September 2022**

Name of Pay TV	Registered subscribers	Active <sup>6</sup> subscribers
Azam Media Rwanda Ltd	14,566	1,793
Star Africa Media Ltd	300,062	25,394
Tele 10 Ltd	3,517	3,365
Canal+ Rwanda Ltd	100,833	54,934
<b>Total</b>	<b>418,978</b>	<b>85,486</b>

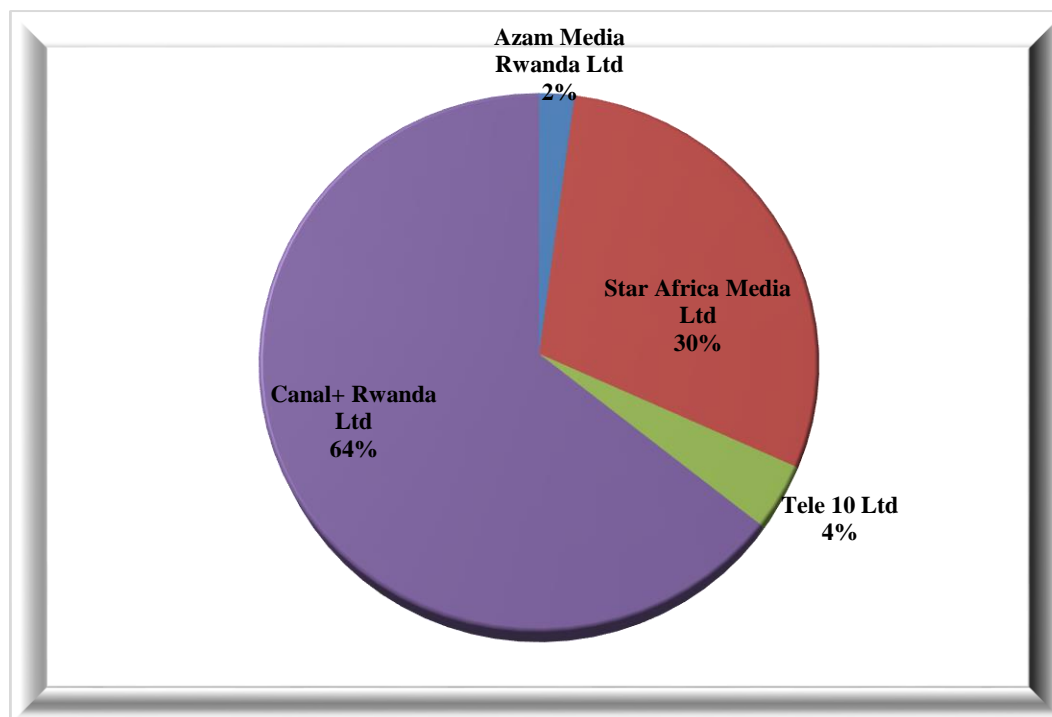
Source: Operators' reports

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

As of September 2022, the market shares for Canal+ Rwanda Ltd in active Pay TV subscriptions was 64%, 30% for Star Africa Media Ltd, 4% for Tele 10 Ltd, and 2% for Azam Media Rwanda Ltd.

**Figure 14: Market share for Pay TV active subscribers per operator as of September 2022**



Source: Operators' reports

### 6.3. Decoders sold

In the third quarter of the year 2022, the number of decoders sold by Pay TV operators decreased from nineteen thousand one hundred seventy-six (19,176) recorded in the previous quarter to fifteen thousand one hundred twenty-two (15,122).

**Table 18: Trend of decoders sold from 3<sup>rd</sup> quarter 2021 to 3<sup>rd</sup> quarter of 2022**

Number of Decoders Sold	Q3 2021	Q4 2021	Q1 2022	Q2 2022	Q3 2022
Azam Media Rwanda Ltd	106	11	0	58	55
Star Africa Media Co., Ltd	5,141	5,419	5,240	6,471	3,925
Tele 10 Ltd	268	262	240	319	311
Canal+ Rwanda Ltd	8,324	17,657	11,751	12,328	10,831
<b>Total</b>	<b>13,839</b>	<b>23,349</b>	<b>17,231</b>	<b>19,176</b>	<b>15,122</b>

Source: Operators' reports

#### 6.4. Pay TV staff

The total number of staff employed by Pay TV operators as of September 2022 was 157 of which 52.9% are employed by Star Africa Media Co., Ltd, 33.8% by Canal+ Rwanda Ltd, 10.2% by Tele 10 Ltd, and 3.2% are employed by Azam Media Rwanda Ltd. The fifty (53) staff representing 33.8% of the total staff are female.

**Table 19: Number of staff employed by Pay TV operators as of September 2022**

Operator	Staff per type of contract			Staff per gender		Domestic and foreign employees	
	Temporary	Permanent	Total	Female	Male	Domestic	Foreign
Azam Media Rwanda Ltd	0	5	5	2	3	4	1
Star Africa Media Co., Ltd	0	83	83	20	63	76	7
Tele 10 Ltd	0	16	16	7	9	16	0
Canal+ Rwanda Ltd	9	45	53	24	30	54	0
<b>Total</b>	<b>9</b>	<b>149</b>	<b>157</b>	<b>53</b>	<b>105</b>	<b>150</b>	<b>8</b>

Source: Operators' reports