



**RWANDA
UTILITIES
REGULATORY
AUTHORITY**

**STATISTICS AND TARIFF INFORMATION IN TELECOM, MEDIA AND POSTAL
SERVICE AS OF MARCH 2016**

May, 2016

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1. PRELIMINARY REMARKS

The information compiled in this report is from telecom companies, Internet Service Providers 4G retailers, RURA database.

Subscription in this context an “active subscriber” is defined as one that has generated revenue within three months of the quarter under review.

2. SUMMARY

This is a first quarter report for 2016; it covers the period from January to March 2016. This report includes information on mobile telephone, fixed telephone, internet, tariffs (voice call tariff, and data tariff), traffic, revenues, investment and employment in telecommunication sector.

In the period under review, the mobile telephone subscriptions increased from 8,759,619 recorded in the fourth quarter 2015 to 8,888,024 that was recorded in the first quarter 2016, this portrays a 1.4% increase. Mobile telephone penetration rate rose to 78.9% as compared to 77.8% recorded at the end of the fourth quarter 2015.

Fixed telephone subscriptions in this quarter fell by 44.5% from 16,983 recorded in the fourth quarter 2015 to 9,425 in this quarter under review. This decrease in fixed telephone subscribers is attributed to CDMA, and inactive telephones in Kigali and other parts of the country that have continued to be disconnected by Liquid telecom Ltd.

On internet data segment, the number of internet subscriptions as of March 2016 decreased by 1.5% to 3,724,678 from 3,784,896 recorded in the first quarter 2016. This represents an internet penetration rate of 33%.

In the media there are 11 licensed Free to Air Televisions, 3 licensed pay TV, 32 radio stations, 54 news papers and 34 online operators and in the postal service there are 12 licensed operators as of March 2016.

3. MOBILE AND FIXED TELEPHONE SUBSCRIPTIONS

As of March 2016, operators offering mobile telephony services included MTN Rwanda Ltd, TIGO Rwanda Ltd and AIRTEL Rwanda Ltd, and those offering fixed telephone services were Liquid Telecom Ltd and MTN Rwanda Ltd.

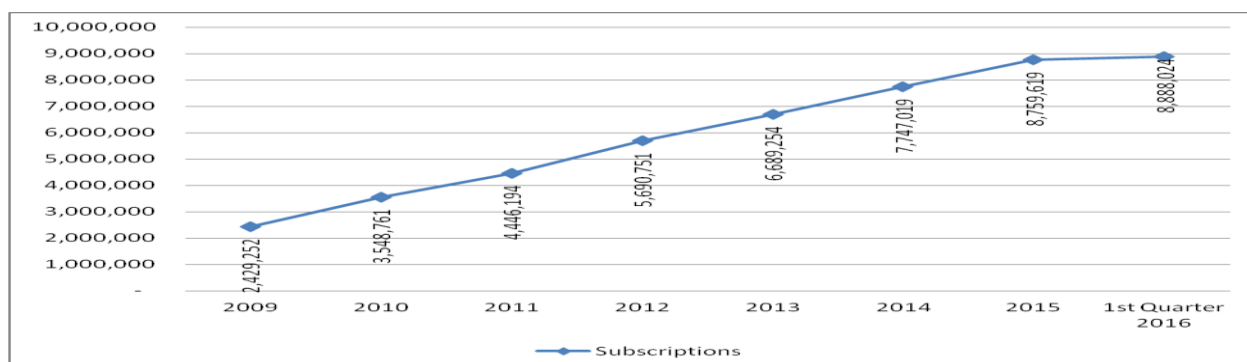
Table 1. Number of mobile and fixed telephone service subscriptions per operator as of March 2016

Operators Name	Active Subscribers		Fixed Tele-density	Mobile Tele-density	General Tele-density
	Mobile Active subscribers	Fixed Telephony	0.08	78.9	78.98
MTN Rwanda Ltd	4,014,858	7,899			
TIGO Rwanda Ltd	3,115,940	N/A			
Airtel Rwanda Ltd	1,676,372	N/A			
Liquid Telecom Ltd	N/A	1,526			
Total	8,888,024	9,425			

Source: RURA operators' returns'

The number of fixed telephones subscriptions decreased from 16,983 recorded in the fourth quarter to 9,425 in this quarter under review. This decrease is mainly due to CDMA and inactive fixed telephones disconnection and the widespread use of mobile telephones which are more convenient to use.

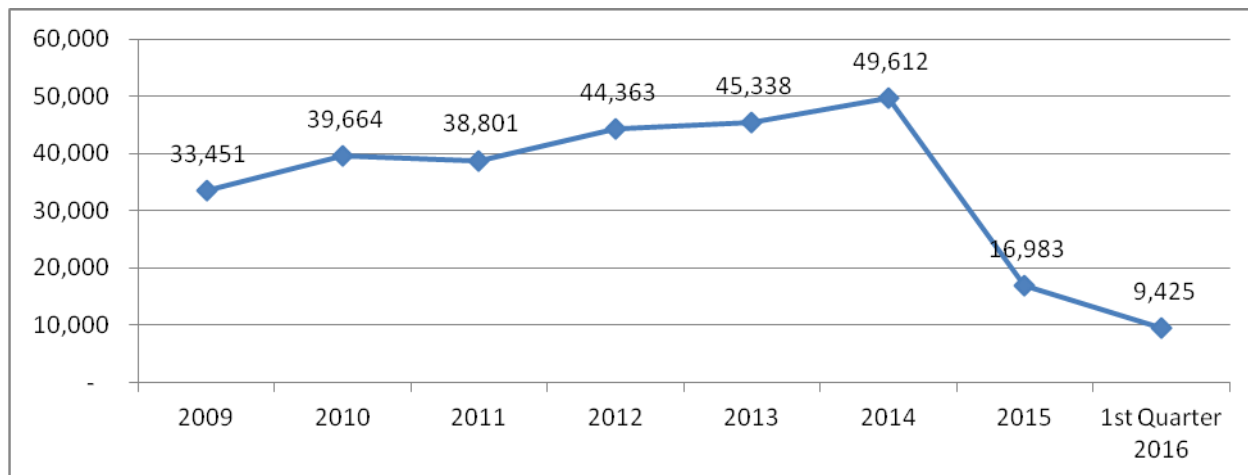
Figure 1: Development of Mobile telephone Subscriptions



Source: RURA operators' returns'

In this quarter increase in mobile telephone subscriptions is 1.4%, from 8,759,619 subscriptions that was recorded as of December 2015 to 8,888,024 that as of March 2016. The increase is mainly attributed to promotional tariffs and calling packs and airtime, popularity of mobile based applications such as social media and financial applications, together with mobile network roll out.

Figure 2: Development of fixed telephone Subscribers



Due to the diffusion of mobile telephones which made people to shift from using fixed phones to mobile telephones, during the first quarter of 2016, the fixed phones decreased by 44.5% whereby the number of subscribers dropped from 16,983 connections in 2015 to 9,425 connections in the first quarter of 2016. From 2014, Liquid Telecom has continued to disconnect inactive fixed telephones all over the country and the CDMA phones in up country.

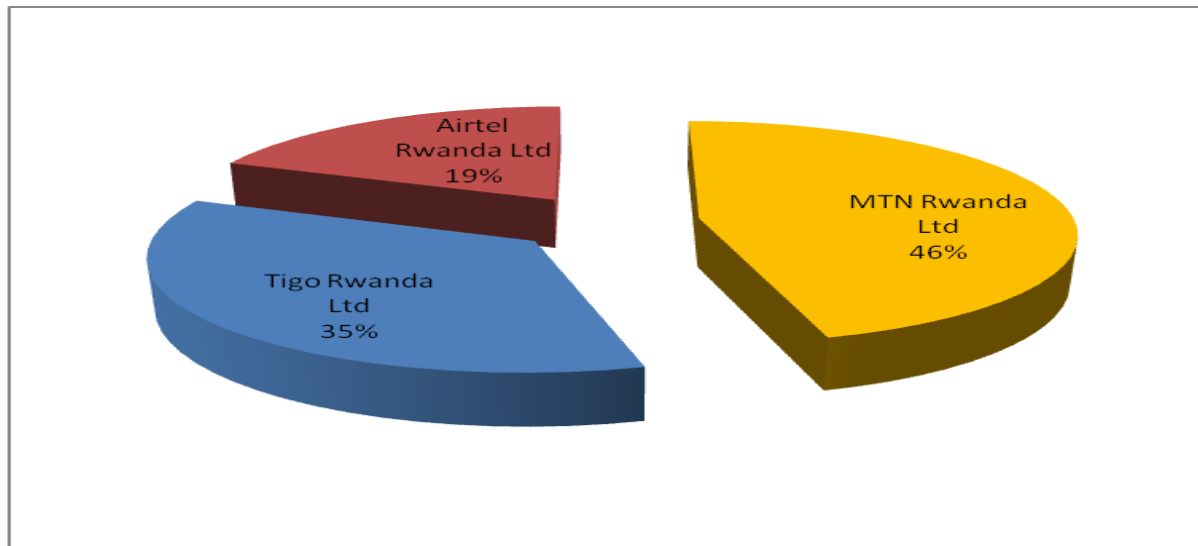
Table 2. International average roaming subscribers' as of the March 2015

	Inbound	Outbound
MTN Rwanda Ltd	151,079	155,158
TIGO Rwanda Ltd	40,923	6,949
AIRTEL Rwanda Ltd	104,018	50,262
Total	296,020	212,369

Source: RURA operators' returns

4. MARKET SHARE AND COVERAGE

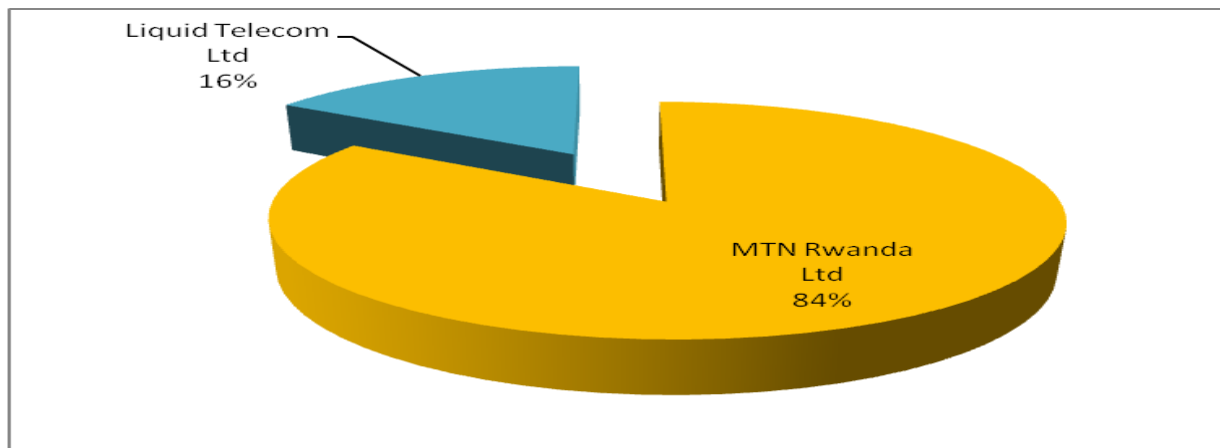
Figure 3: Mobile Telephone subscribers market share per operator as of the March 2016



Source: RURA operators' returns

MTN Rwanda Ltd continued to show the biggest market share in the first quarter 2016 of 46%, Tigo Rwanda followed with 35 % and Airtel Rwanda has the market share of 19% in mobile telephone subscriptions.

Figure 4: Fixed telephone service Market share per operator as of March 2016



Source: RURA operators' returns

The continued disconnection of fixed telephones by Liquid Telecom Ltd has moved it from being with the largest market to the least market share of 16%, and gave MTN Rwanda to have the largest market share in this segment with 84% in this quarter under review.

Table 3. Mobile telephone network coverage per type of technology and per operator as of March 2015

Operator	2G	2.5G	3G	3.5G
GEOGRAPHIC COVERAGE				
MTN Rwanda Ltd	99.11%	99.11%	69.57%	69.57%
TIGO Rwanda Ltd	89.62%	89.62%	16.00%	16.00%
AIRTEL Rwanda Ltd	92.02%	92.02%	17.00%	17.00%
POPULATION COVERAGE				
MTN Rwanda Ltd	99.91%	99.91%	89.03%	89.03%
TIGO Rwanda Ltd	99.98%	99.98%	52.43%	52.43%
AIRTEL Rwanda Ltd	93.45	93.45	23.15	23.15

Source: RURA operators' returns

Geographically MTN 2G and 2.5 Network covers 99.11% of the total land area, followed by Airtel Rwanda Ltd with 92.02 % and 89.62% for TIGO Rwanda Ltd. This geographic network gives the opportunity to 99.91% of the population to access 2G and 2.5G networks of MTN Rwanda Ltd, 99.98% of TIGO Network and 93.45% of AIRTEL network.

3G and 3.5G mobile technologies were deployed geographically by MTN Rwanda Ltd at the level of 69.57%, Tigo Rwanda Ltd at 16%, and 17% for Airtel Rwanda Ltd as of March 2016.

5. VOICE AND SMS TARIFF STRUCTURE

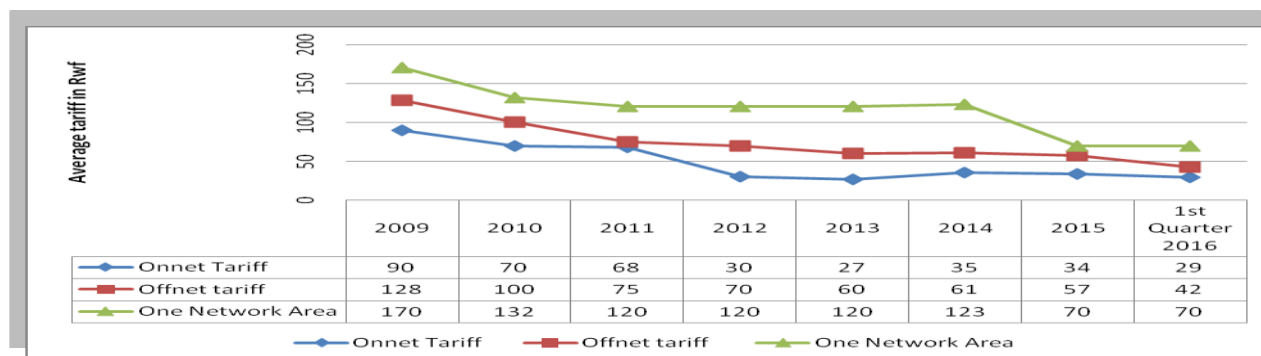
Table 4. Mobile telephone voice tariff (in Rwf) per minute per operator as of March 2016.

Destination	MTN Rwanda Ltd		Tigo Rwanda Ltd	Airtel Rwanda Ltd
	Prepaid	Postpaid		
Onnet Tariff		46	10	32
Offnet tariff		60	35	32
One Area Network		70	70	70
US/Canada/China/India /Belgium[2]		51		50

Table 5: Fixed telephone service tariff structure

Fixed Telephone Tariff	Liquid Rwanda Ltd	MTN Rwanda Ltd
On net	20	46
Off net	60	60
EAC	135	70
Rest of Africa	155	255

Source: RURA operators' returns

Figure 5: Voice Tariff Trend (Frw per minute)

Source: RURA operators' returns'

Table 6 : SMS tariff structure

SMS	On net Tariff	Off net tariff	One area Network
MTN Rwanda Ltd	12	60	45
Airtel Rwanda Ltd	11	22	11
Tigo Rwanda Ltd	11	26	45

Source: RURA operators' returns'

6. TRAFFIC STATISTICS

6.1 Voice total outgoing and incoming mobile calls (In Minutes)

Table 7. Outgoing and Incoming traffic as of March 2016 per operator

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd	Tigo Rwanda Ltd	Total
Outgoing traffic				
On net	759,890,287	677,442,531	1,215,791,509	2,653,124,327
Off net	12,754,812	12,164,385	14,074,908	38,994,105
International	26,743,350	2,454,970	3,845,073	33,043,393
Incoming traffic				
Off net	27,015,477	4,510,547	33,111,057	64,637,081
International	14,738,780	5,124,106	4,408,332	24,271,218

Source: RURA operators' returns'

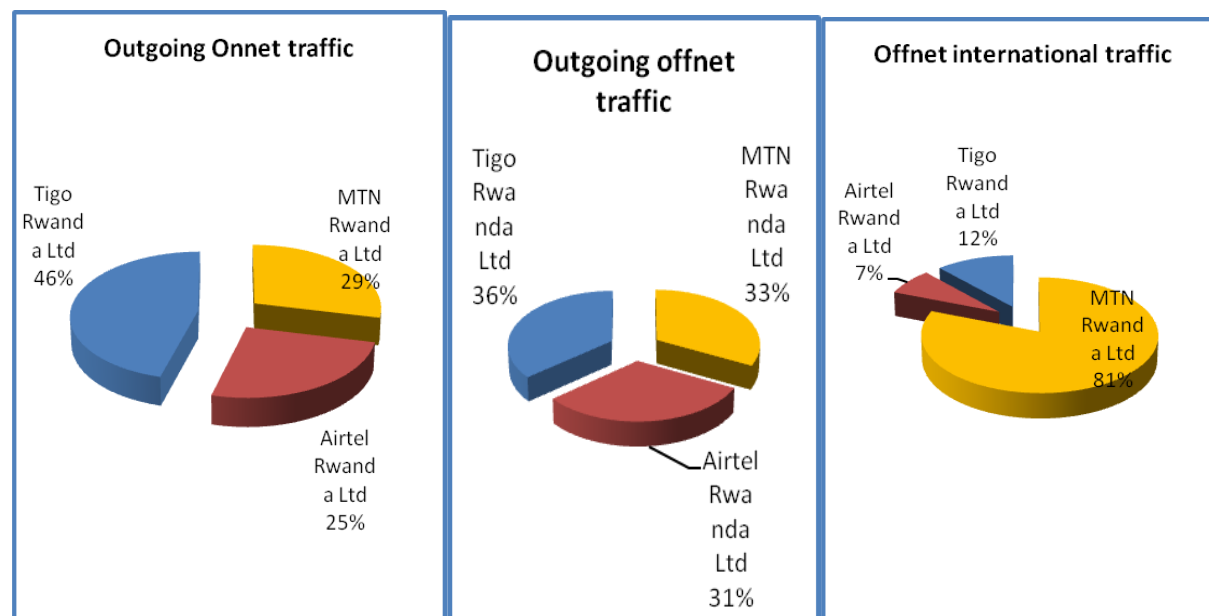
6.2 Voice total outgoing and incoming roaming traffic (In Minutes)

Table 8. Outgoing and Incoming Roaming traffic as of March 2015 per operator

Destination	MTN Rwanda Ltd	Tigo Rwanda Ltd	Airtel Rwanda Ltd	Total
Incoming	1,586,786	7,181,200	4,652,598	13,420,584
Outgoing	379,592	70,029	11,520,689	11,970,310

Source: RURA operators' returns'

Figure 6: Outgoing on net, off net and international voice traffic market share per operator as of March 2015



6.3 Data Traffic

Table 9: Mobile data traffic as of Quarter 4, 2015 and Quarter 1, 2016

Operator	Data Traffic	
	Quarter 4 2015	Quarter 1 2016
MTN Rwanda Ltd	624,674	624,674.49
Airtel Rwanda Ltd	379,077,036	379,077,036
Tigo Rwanda Ltd	266,009,529	375,888,364
Total	645,711,239	755,590,074

Source: RURA operators' returns'

7. STATUS OF INTERNET SERVICE PROVISION

7.1. Licensed Operators

Table 10. Licensed internet service providers as of March 2016

ISPs	Licensed From(Year)	Status
Internet Service Providers		
MTN Rwanda Ltd	2006	Operational
Liquid Telecom Ltd	2014	Operational
TIGO Rwanda Ltd	2008	Operational
New Artel Ltd	2004	Operational
ISPA Ltd	2006	Operational
4G NETWORKS Ltd	2009	Operational
BSC Ltd	2010	Operational
AIRTEL Rwanda Ltd	2011	Operational
AXIOM	2014	Operational
4G LTE Wholesaler		
Olleh Rwanda Network(ORN)	2013	Operational
4G LTE Retailers		
GMAX	2014	Operational
Intercom Technologies	2014	Not yet Operational
4NetAfrica Ltd	2014	Operational
Piramie Inc	2014	Not yet Operational
Twinning in Corporation	2015	Not yet Operational
Simba Supermarket	2015	Operational
TRUCONNECT ltd	2015	Operational
POPCORN Ltd	2015	Operational

Suku NSA Ltd	2015	Not yet Operational
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Source: RURA operators' returns

7.2. Internet Subscribers

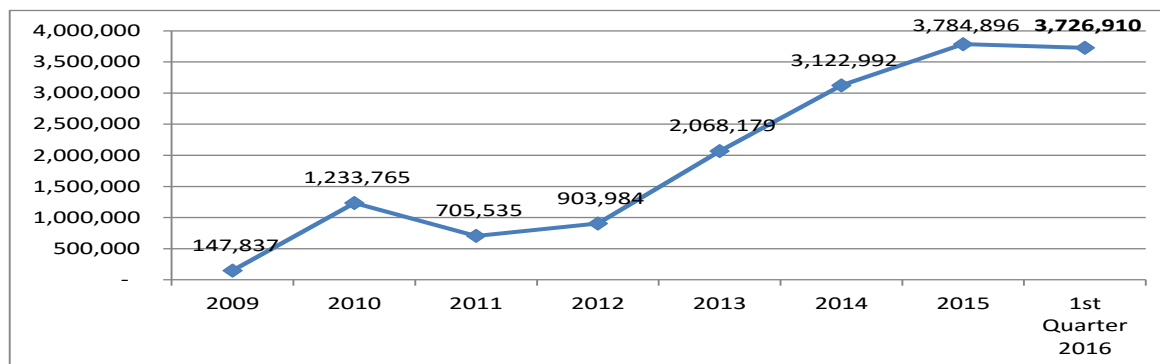
The table below illustrates the breakdown of internet subscribers per category and per operator

Table 11. Internet subscribers per category per operator as of March 2016

	Fixed internet			Total internet subscribers
	Narrowband (≤ 256 kbps)	Broadband (≥ 256 kbps)	Mobile internet	
Liquid Telecom ltd	18	400		418
Mtn Rwanda ltd	193	19,272	1,516,965	1,536,430
Tigo Rwanda ltd		115	1,505,773	1,505,888
New Artel ltd	16	45	85	146
ISPA ltd	37	120		157
4g Networks ltd		110	146	256
BSC ltd		1,199	1,330	2,529
Axiom Networks ltd		89	17	106
Airtel rwanda ltd		61	678,208	678,269
Gmax Ltd			125	125
Popconn Ltd			108	108
Truconnect			132	132
Tnsp's			69	69
4NET			45	45
Total	264	21,411	3,703,003	3,724,678

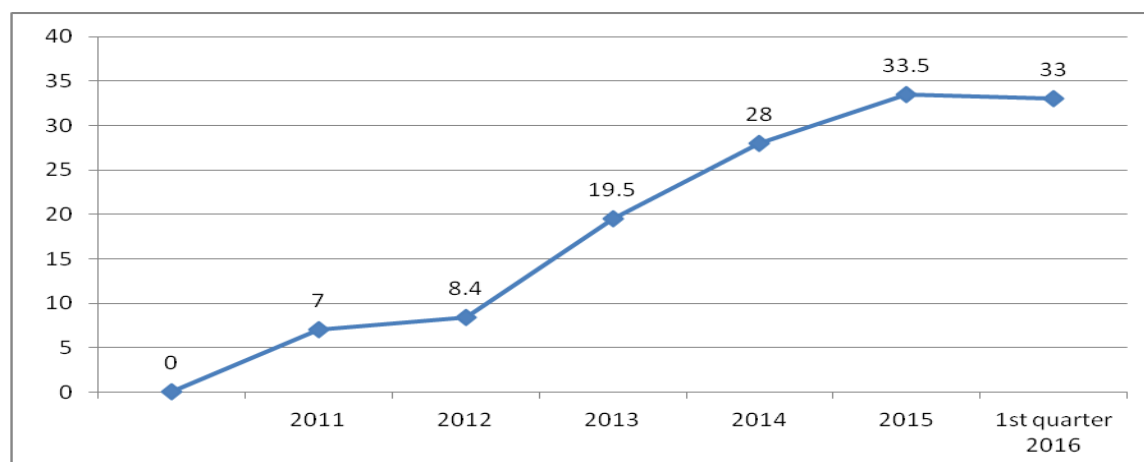
Source: RURA operators' returns

Figure 7: Trend in total internet Subscribers up to March 2016



Source: RURA operators' returns

Figure 8: Internet penetration rate trend up to March 2016



Source: RURA operators' returns

7.3. International Internet Bandwidth

Table 12: International internet bandwidth (Mbps) per operator as of March 2016

Type	MTN Rwanda Ltd	Liquid Telecom Ltd	New Artel Ltd	Tigo Rwanda Ltd	Airtel Rwanda ltd	ISPA	4G Networks Ltd	BSC	Axiom Networks Ltd	Total
UP Link	1552	1000	60	900	20	130	110	2440	120	12,664
Down Link	1552	1000	60	900	20	130	110	2440	120	

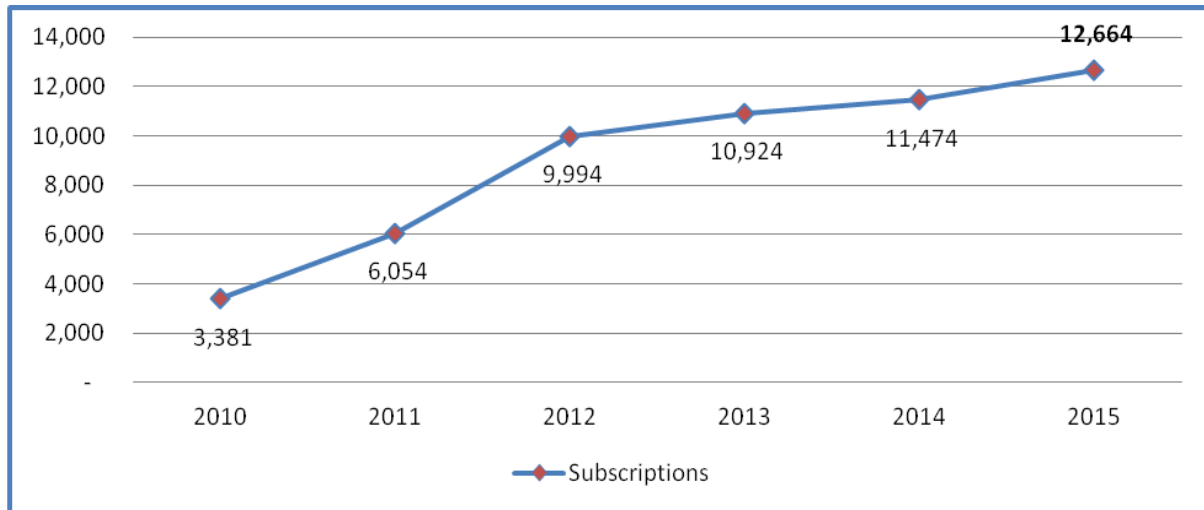
Source: RURA operators' returns

Table 13. 4G Geographic and Population coverage by ORN

Network coverage	Geographic Coverage	Population Coverage
Overall coverage	6	20
City of Kigali	75	93
Northern Province	3	6
Eastern Province	4	13
Southern Province	2	8
Western Province	4	13

Source: RURA operators' returns

Figure 9: Trend in International Internet bandwidth

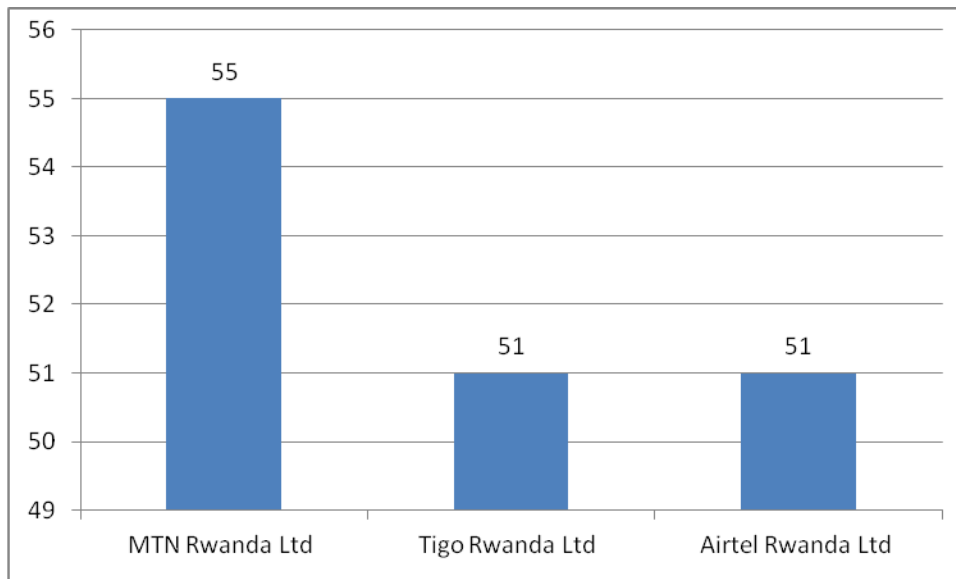


Source: RURA operators' returns

7.4. Internet Tariff

7.4.1 Mobile Internet Tariff

Figure 10: Standard mobile Internet tariff (Rwf/Mb) as of March 2016



Source: RURA operators' returns

7.4.2 Fixed Internet Tariff

Table 14. Fixed Internet tariffs per operator as of March2015 (In Rwf VAT inclusive)

		Liquid Teleco m Ltd	MTN Rwand a Ltd	Tigo Rwanda Ltd	ISP A	New Artel Ltd	BSC	Axiom Networ ks Ltd	4G Networ ks Ltd
Wireless	128/64 Kbps Residential	64,900		66,150	59,000				
	128/64 Kbps Business	64,900							
	128/128 Kbps					59,000			
	256/128 Kbps	236,000			118,000				
	256/256 Kbps					118,000			41,595
	384/192 Kbps	354,000		132,300					
	512/512Kbps		210,000						62,540
	512/256Kbps	743,400							
	1Mbps	1,534,000		264,600		300,000		297,362	103,250
	1Mbps dedicated								236,000
	2 Mbps dedicated								413,000
	2 Mbps			480,000				467,282	
	3Mbps			720,000				594,723	
	5Mbps Dedicated						180,000		743,400
	4Mbps			840,000					
	5Mbps			1,050,000					
6Mbps			1,260,000						
7Mbps			1,470,000						
8Mbps			1,680,000						

				0					
	9Mbps			1,890,000					
	10Mbps			2,100,000					
Fiber	64 Kbps	50,150							
	128Kbps	100,300							
	256Kbps	141,600							
	512Kbps	177,000	210,000						
	1Mbps	354,000							
	2Mbps	590,000							
	3Mbps	826,000							
	4Mbps	1,062,000							
	5Mbps	1,298,000							
	6Mbps	1,534,000							
7Mbps	1,770,000								
8Mbps	2,006,000								
9Mbps	2,242,000								
10Mbps	2,478,000								
Copper	64 Kbps Data Copper- Kigali	101,511							
	64 Kbps Data Copper-Up country	185,222							
	128 kbps Data Copper- Kigali	147,184							
	128 kbps Data Copper-Up	268,933							

	country						
	256kbps-DATA(Copper-kigali)	213,166					
	256kbps-DATA(copper-Up country)	415,360					
	512kbps DATA(Copper)	296,405					
	1024kbps DATA(Copper)	479,117					
	2048kbps DATA(Copper)	544,079					
	EVDO	35,000					
Fixed	1Mbps					534,963	438,480
	2 Mbps					900,579	
	3Mbps					1,134,003	

Source: RURA Operators' returns

Table 15: ORN Bandwidth tariff (in Rwf VAT inclusive)

VOLUME BASED TARIFFS	In Rwf
1GB or less(price per 1GB)	3,226
1-3GB(Price per 1GB)	3,011
3-10GB(Price per 1GB)	2,797
10-100GB(Price per 1GB)	2,710
Above 100GB and unlimited(Price per 1GB)	2,581
wholesale monthly products packs	
MUP 500MB/Day	15,486
MUP smart 500MB+500MB per day	17,208
MUP 1GB/Day	30,973
MUP 2GB/Day	61,946
MUP 4GB/Day	123,893
Smart Business 100GB/Month	197,885
Others	
Dark Fiber LEASE (Rwf/Core/Km)	27,756
Domestic shared Capacity Service	80,015
International Capacity	68,830

Source: RURA operators' returns

Table 16: Telecom Revenues in the first quarter 2016

	Revenues in Rwf
Total MNOs Revenues	35,696,972,652
Total ISPs , 4G retailers and Liquid Revenues	4,863,939,526
Total	40,560,912,178

Source: RURA operators' returns

Table 17: Telecom investment in the 1st Quarter 2016

	Investment in Rwf
Total MNOs Revenues	4,673,465,787
Total ISPs , 4G retailers and Liquid Revenues	1,886,765,496
	6,560,231,283

Source: RURA operators' returns

1. EMPLOYMENT IN TELECOMMUNICATION SECTOR

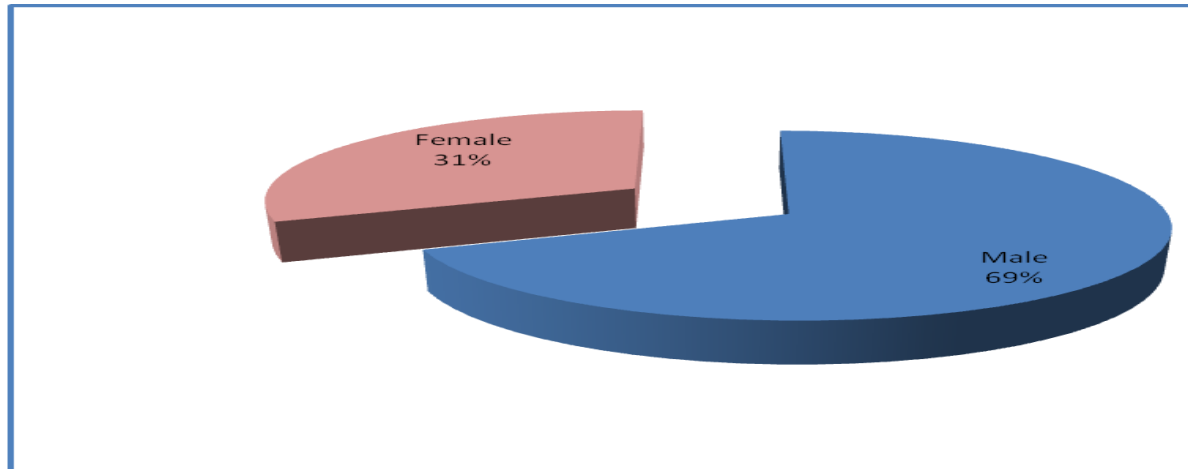
1,112 people are employed in Telecommunication sector, 646 are permanent staffs and 91 are temporary staffs and 375. 31% of these staff are women and 69% are male as it is shown in the following table;

Table 18: Number of staffs employed in Telecommunication sectors as of March 2016

Operator	Temporary	Female	Foreign	Permanent	Outsourced	Total staff
MTN Rwanda Ltd	17	167	10	104	150	271
Tigo Rwanda Ltd	0	59	17	159	125	284
Airtel Rwanda Ltd	0	47	8	86	73	159
Liquid Telecom Ltd	34	10	5	67	0	101
BSC Ltd	9	6	0	15	0	24
4G Networks Ltd	5	2	0	3	0	8
ISPA Ltd	0	6	0	19	0	19
New Artel Ltd	0	4	0	45	0	45
GMAX	0	2		5	0	5
TRUCONNECT	9				0	9
Axiom Networks Ltd	4	1	0	25	0	29
4NET Africa	4	0	0	5	0	9
TNSP	0	1	0	5	2	7
ORN Ltd	9	33	25	98	25	132
POPCONN Ltd	0	7	3	10	0	10
Total	91	345	54	646	375	1,112

Source: RURA operators' returns

Figure 11: Staffs by gender as of March 2016



2. MEDIA

With the new mandate of RURA to regulate media industry, and following the enactment of the media law of 2013, RURA in addition to TVs and radios, licensed Internet and Print Media organs. The table below shows a list licensed TV stations, FM Radio Broadcasters, newspapers and online media registered to operate in Rwanda, by the end of the fiscal year under review.

Table 19: licensed media operators as of March 2016

FREE TO AIR	RADIO STATIONS	NEWSPAPERS	ONLINE
1. TV1	1. Authentic	1. Umurinzi	1. Ruhago Yacu Ltd
2. Family	2. Amazing Grace Christian	2. Imanzi	2. Umuseke Ltd
3. TV10	3. Royal Fm	3. Umuhuza	3. Gorilla Entertainment Group Ltd
4. Lemigo TV(Royal TV)	4. RC Musanze(under RBA)	4. Rwanda Dispatch Magazine	4. Igihe Ltd
5. Yego	5. RC Rubavu	5. Hoberwanda	5. Ireme Ltd
6. Goodrich	6. RC Rusizi	6. Mont Jali	6. MIG Entertainment Group
7. Contact	7. RC Nyagatare	7. Isimbi	7. Demeso Ltd
8. Exalto	8. RC Huye	8. Umurabyo	8. Kigali Today Ltd
9. Cloud	9. Izuba	9. Gorilla24 Ad Magazine	9. Hobe Rwanda Magazine
10. Isango Star	10. Umucyo Community	10. Ishema	10. Ibyamamare Media Group
11. Flash	11. Isango Star	11. Kinyamateka	11. Kigali Hits Ltd
	12. Radio 1 Rwanda	12. Grands Lac	12. Gisenyi Today
	13. Radio 10	13. Hebdo journal	13. Hillywood Technology
	14. Inkoramutima	14. Journal Rugali	14. Kivu 24. Com
	15. Radio Flash	15. Umusingi	15. Family Magazine
	16. KT Radio	16. Inzobe	16. Watoto Smile
	17. Ishingiro	17. The Partner Magazine	17. Ulamb Complex Arts Ltd
	18. Radio Maria Rwanda	18. Ijwi Ry'umuturage	18. Ewr(Education Website For Rwanda Ltd
	19. Radio Voice of Africa Kigali Fm	19. HOBE Magazine(Pallotti -Presse)	19. Urumuri Media Link
	20. Huguka	20. Angels Ubuto	20. Aheza
	21. Salus	N'ubukuru	21. Bwiza
	22. Isangano Community	21. PAX Press	22. Umuryango Company Ltd

<p>PAY TV</p> <ol style="list-style-type: none"> 1. Star Africa Media 2. Tele 10 3. Azam Media Group Ltd 	<p>Radio</p> <ol style="list-style-type: none"> 23. Sana 24. The Voice of Hope 25. Kiss Fm 26. KFM 27. City radio "Inshuti ya bose" 28. Rwanda 29. Rwanda-Inteko 30. Magic Fm 31. Contact Fm 32. Hot Fm 	<ol style="list-style-type: none"> 22. Igisabo 23. Izuba Rirashe 24. Invaho Nshya 25. La Nouvelle Releve 26. Intego 27. The Independent Publications 28. The Rwanda Focus 29. Hope Magazine 30. Ihema 31. Impamo 32. Ingenzi 33. Journal le reveil Indatwa 34. Journal imena Gasabo 35. Journal ubumwe 36. Celes magazine 37. Umuryango 38. Cosmos magazine 39. The east african/ rwanda today 40. Rushyashya 41. Ishya n'ihirwe 42. The diva magazine 43. The link magazine 44. Panorama 45. Umuseke 46. Umwezi 47. Urungano magazine 48. Butuyu 49. Yambi Magazine 50. Construction Magazine 51. The Service Mag 52. Intambwe 53. Umuyenzi 54. Novella 	<ol style="list-style-type: none"> 23. Agasaro Women Magazine 24. .Ibyishimo Ltd 25. Umukunzi Ltd 26. Rwandapaparazzi ltd 27. Inyarwanda Ltd 28. Nonaha Ltd 29. Invano 30. Agakiza 31. Umubavu 32. Kumugaragararo Ltd 33. Intyoza Ltd 34. Ibaruwa Tech and Media
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Source: RURA database

According to the table above there are 11 Free to Air licensed Televisions and 3 Pay Tv Operators, 32 radios, 54 newspaper and 34 online media.

Table 20: Pay TV subscribers as of March 2016

	Azam Media ltd	Star Africa Media Ltd	Tele 10 Ltd	Total
Active Subscribers	1,372	42,332	12,896	56,600
Registered Subscribers	3,132	199,217	19,568	221,917

Source: RURA operators' returns

Table 21: Tariff Structure in Frw for pay TV operators as of March 2016

Star Africa Media Ltd			
Nova	2500	2500	21
Basic	4500	4500	37
Classic	9000	9000	56
Unique	18000	13500	73
Sport Play	2500	2500	2
Sport Plus	4500	4500	4
Azam Media Ltd			
Smart	9000	7500	90
Super	18000	15000	190
New Chinese	15000	15000	124
India	9000	9000	9
Sport Plus	4,500	4500	4
Tele 10			
Installations fees	15,000	N/A	
Initial Access Fees (Canal)	40,000	N/A	
Initial Access Fees (DSTV)	75,700	N/A	
Canal 1	7,000	N/A	
Canal 2	40,000	N/A	
DSTV	75,700	61,300	

Source: RURA operators' returns

3. POSTAL SERVICES

Table 22: Licensed postal operators as of march 2016

Name of the Company	Category
Panorama Ltd	International Courier License
DHL Express	International Courier License
Pan Africa Express Transport Ltd (Licensee of FedEx)	International Courier License
Skynet Worldwide Express Ltd	International Courier License
National Post Office	Public Postal operator License
Dove Forwarding and Supply Company Ltd	Regional courier License;
Shaft Ltd	Regional courier License;
Stella Express Ltd	Domestic courier License
Sotra Tour & Travel Agency Ltd	Domestic courier License
Sofast Ltd	Domestic courier License
Horizontal Ltd	Domestic courier License
Kigali Coach Tours & Travel Ltd	Domestic courier License

Source: RURA operators' returns'