



**RWANDA
UTILITIES
REGULATORY
AUTHORITY**

STATISTICS AND TARIFF INFORMATION IN TELECOM SECTOR AS OF

JUNE 2015

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PRELIMINARY REMARKS

- The information compiled in this report is from telecom companies and Internet Service Providers.
- Subscription in this report is defined as active subscribers that have generated revenue within three months of the quarter under review.

SUMMARY

This is a second quarter report for 2015; it covers the period from March 2015 to June 2015. This report includes information on mobile telephone, fixed telephone, internet, tariff (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 7,913,986 recorded in the first quarter 2015 to 8,181,993 as of the second quarter 2015. This portrays a 3% increase. Mobile telephone penetration rate rose to 72.6% as compared to 72.3% recorded at the end of the previous quarter.

Fixed telephone subscriptions in this quarter fell by 5.3% from 48,931 recorded in the first quarter 2015 to 46,465 recorded in this quarter under review. This decrease in fixed telephone subscribers is attributed to CDMA telephones in up country that have continued to be disconnected by Liquid telecom Ltd.

On internet data segment, the number of internet subscriptions as of June 2015 is 3,542,835 from 3,140,310. This represents internet penetration rate of 12.8%.

MOBILE AND FIXED TELEPHONE SUBSCRIPTIONS

As of June 2015, 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.

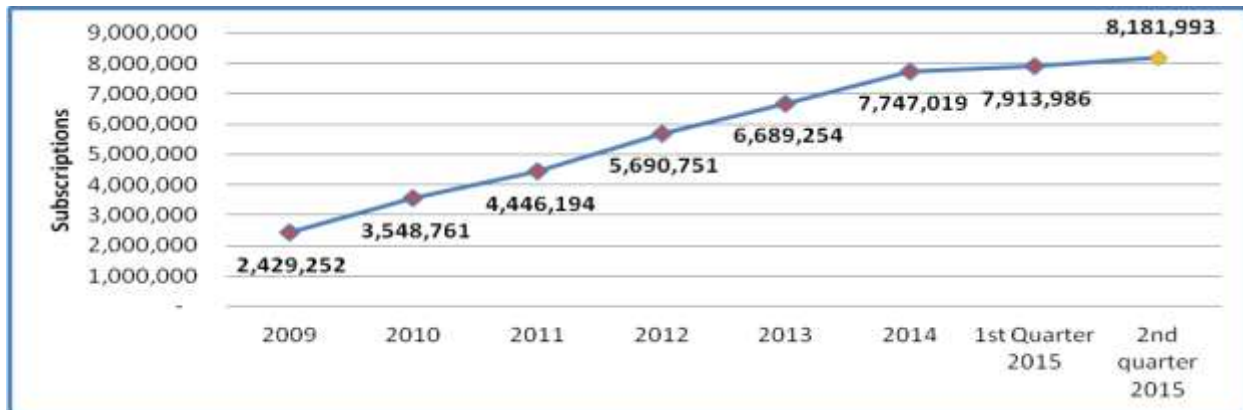
Table 1. Number of mobile and fixed telephone service subscriptions per operator as of June 2015

Operators Name	Active Subscribers		Fixed Teledensity	Mobile Teledensity	General Teledensity
	Mobile subscribers	Active Fixed Telephony			
			0.4%	72.6%	73%
MTN Rwanda Ltd	3,957,986	15,497			
TIGO Rwanda Ltd	2,887,328	N/A			
Airtel Rwanda Ltd	1,336,679	N/A			
Liquid Telecom Ltd	N/A	30,968			
Total	8,181,993	46,465			

Source: RURA operators'

The number of fixed telephones subscriptions decreased from 48,931 recorded in the first quarter to 46,465 recorded in the second quarter, this decrease is mainly due to CDMA Fixed telephones disconnection up country.

Figure 1: Development of Mobile telephone Subscriptions



Source: RURA operators'

According to figure 1, Mobile telephone subscriptions as of June 2015 were 8,181,993 from 7,913,986 subscribers for the 1st quarter 2015. This shows an increase of 3%. The increase is mainly attributed to Burundian refugees, 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

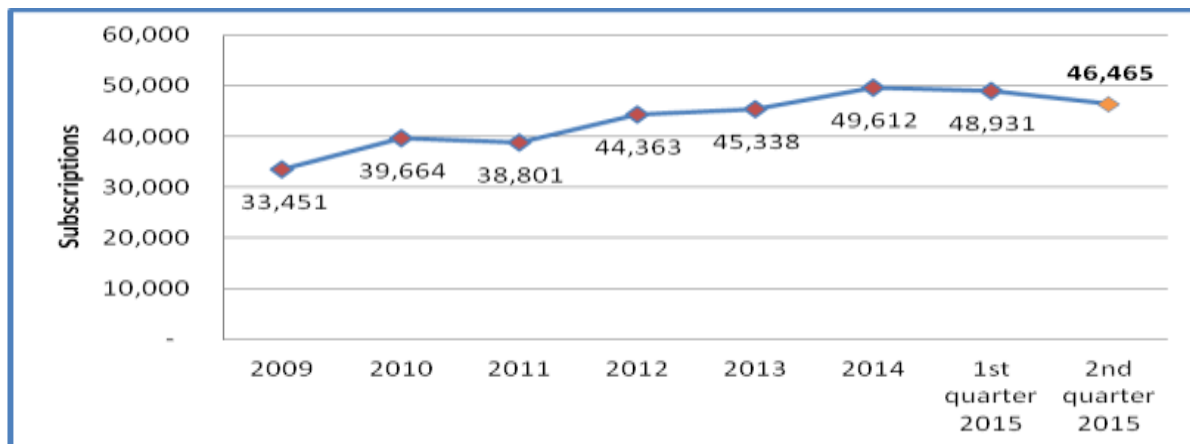


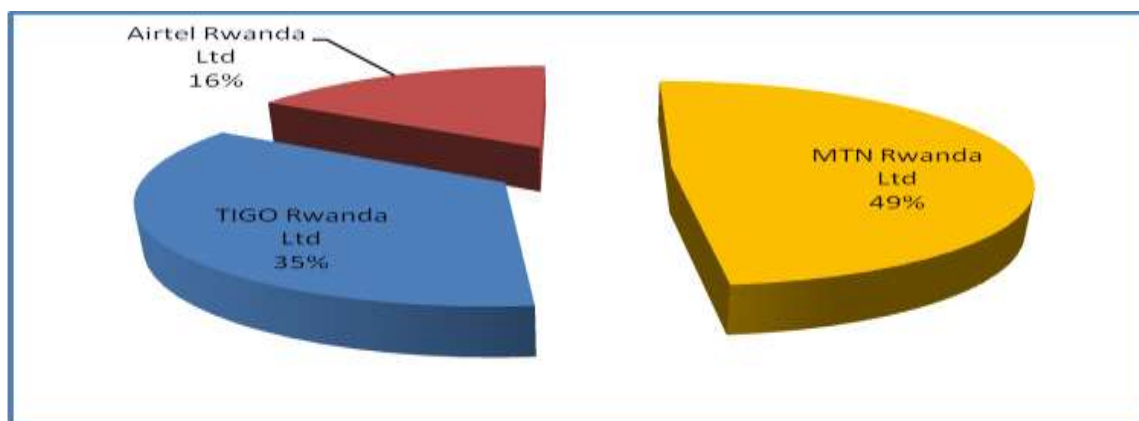
Table 2. International average monthly roaming subscribers’ as of the June 2015

	Incoming	Outgoing
MTN Rwanda Ltd	127,191	138,860
TIGO Rwanda Ltd	168,755	201,996
AIRTEL Rwanda Ltd	124,382	48,232
Total	420,328	389,088

Source: RURA operators’ returns

MARKET SHARE AND COVERAGE

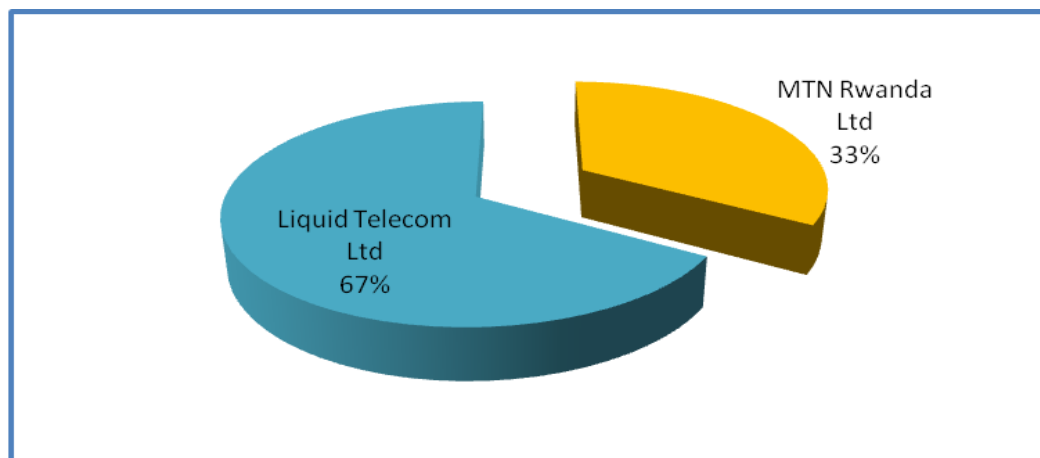
Figure 3: Mobile Telephone subscribers market share per operator as of the June 2015



Source: RURA operators’ returns.

MTN Rwanda Ltd continued to show the biggest market share in the second quarter 2015 of 49%, Tigo Rwanda followed with 35 % recorded in June 2015 and Airtel Rwanda has the least market share of 16%.

Figure 4. Fixed telephone service Market share per operator as of June 2015



Source: RURA operators’ returns.

Liquid Telecom Ltd continued to dominate the fixed telephone market in the June 2015 with a market share of over 67%, followed by MTN Rwanda Ltd with a 33% market share.

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

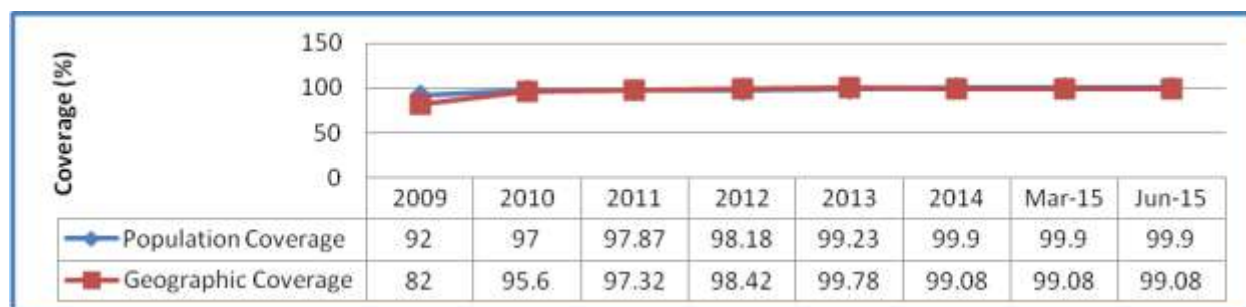
	2G	2.5G	3G	3.5G
GEOGRAPHIC COVERAGE				
MTN Rwanda Ltd	99.08	99.08	64.49	64.49
TIGO Rwanda Ltd	88.98	88.98	12.35	12.35
AIRTEL Rwanda Ltd	89.73	89.73	15.36	15.36
POPULATION COVERAGE				
MTN Rwanda Ltd	99.9	99.9	85.07	85.07
TIGO Rwanda Ltd	99.83	99.83	49.54	49.54
AIRTEL Rwanda Ltd	91.56	91.56	22.19	22.19

Source: RURA operators’ returns

Geographically MTN 2G and 2.5 Network covers 99.08% of the total land area, followed by Airtel Rwanda Ltd with 89.73 % and 88.98% for TIGO Rwanda. This geographic network gives the opportunity to 99.9% of the population to access 2G and 2.5G networks of MTN Rwanda Ltd, 99.83% of TIGO Network and 91.56% of AIRTEL network.

3G and 3.5G mobile technologies were deployed geographically by MTN Rwanda Ltd at the level of 64.49%, Tigo Rwanda Ltd at 12.35%, and 15.36% for Airtel Rwanda Ltd as of June 2015.

Figure 5: Geographic and population network coverage Trend



Population and the Geographic coverage remained unchanged for the last three quarters.

TARIFF STRUCTURE

Mobile telephone tariff structure

Table 4. Mobile telephone voice tariff (in Rwf) per minute), per operator as of June 2015.

	<i>MTN Rwanda Ltd</i>		<i>Tigo Rwanda Ltd</i>	<i>Airtel Rwanda Ltd</i>
	Prepaid	Postpaid		
<i>Onnet Tariff</i>	46		34	25 ^[1] /31 ^[2]
<i>Offnet tariff</i>	60		60	62(46) ^[3]
<i>East Africa tariff</i>	Kenya	60	68	59
	Uganda	60	60	
<i>Rest of Africa tariff group A</i>	60		165	169
<i>Rest of Africa group B</i>	158			
<i>US/Canada/China/India /belgium</i>	51			29 ^[4] /50 ^[5]
<i>International Group A</i>	168		240	240
<i>International group B</i>	398			
<i>Satellite</i>	4930		4,500	5,000

¹ Out of Kigali onnet tariff

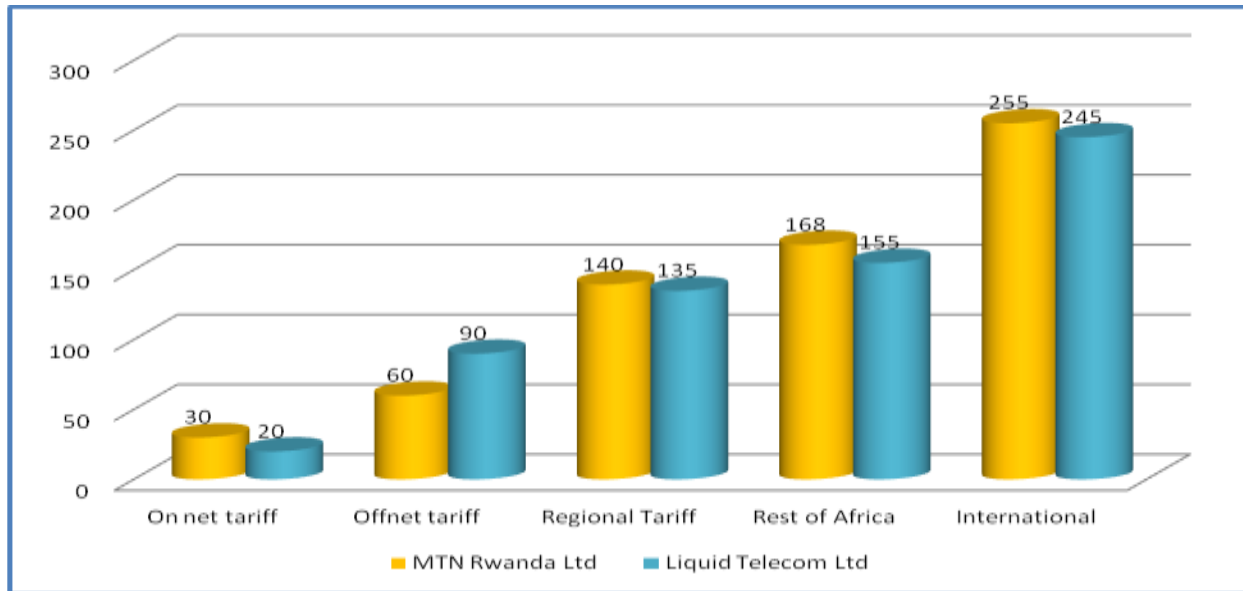
² Kigali onnet tariff

³ The first minute is charged 62 Rwf and the rest of minutes called are charged 46 Rwf per minute

⁴ This applies to Canada,China,India,USA

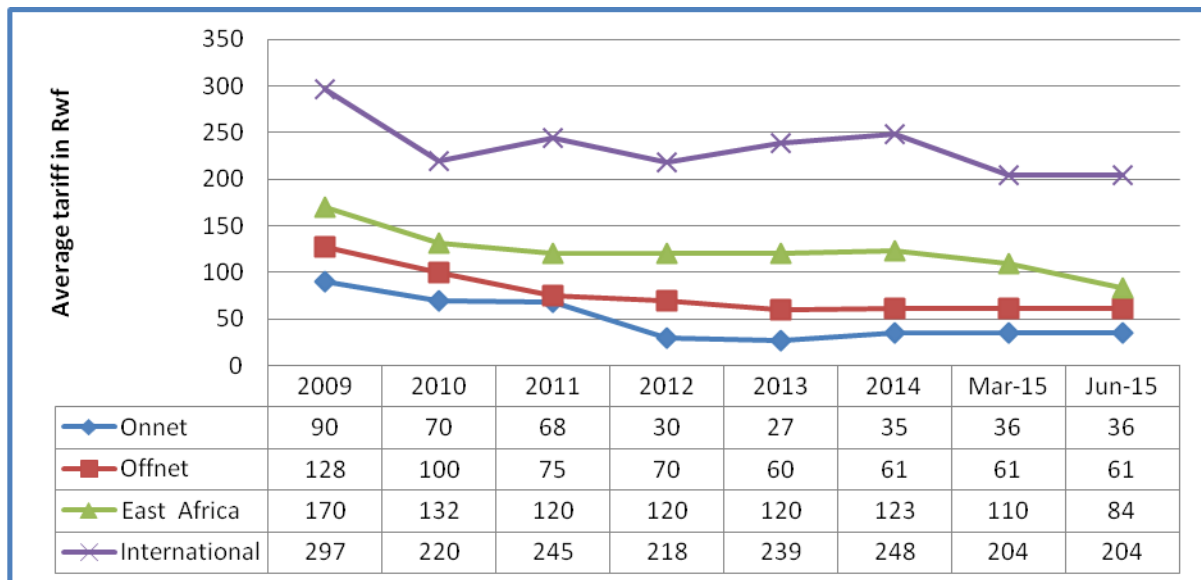
⁵ Belgium,France,UK Fixed

Figure 6 : Fixed telephone service tariff structure



Source: RURA operators' returns

Figure 7: Voice Tariff Trend (Frw per minute)



Source: RURA operators' returns

TRAFFIC STATISTICS

TOTAL OUTGOING AND INCOMING MOBILE CALLS(IN MINUTES)

Table 5. Outgoing and Incoming traffic as of June 2015 per operator

Outgoing traffic				
	MTN Rwanda Ltd	Airtel Rwanda Ltd	Tigo Rwanda Ltd	Total
Outgoing traffic				
On net	864,467,684	492,628,800	1,078,253,925	2,435,350,409
Off net	12,345,180	8,408,310	10,119,633	30,873,123
International	24,253,909	7,463,853	5,278,404	36,996,166
Incoming traffic				
Off net	17,272,101	13,756,598	6,159,212	37,187,911
International	16,213,258	8,368,966	2,182,258	26,764,482

Source: RURA operators' returns

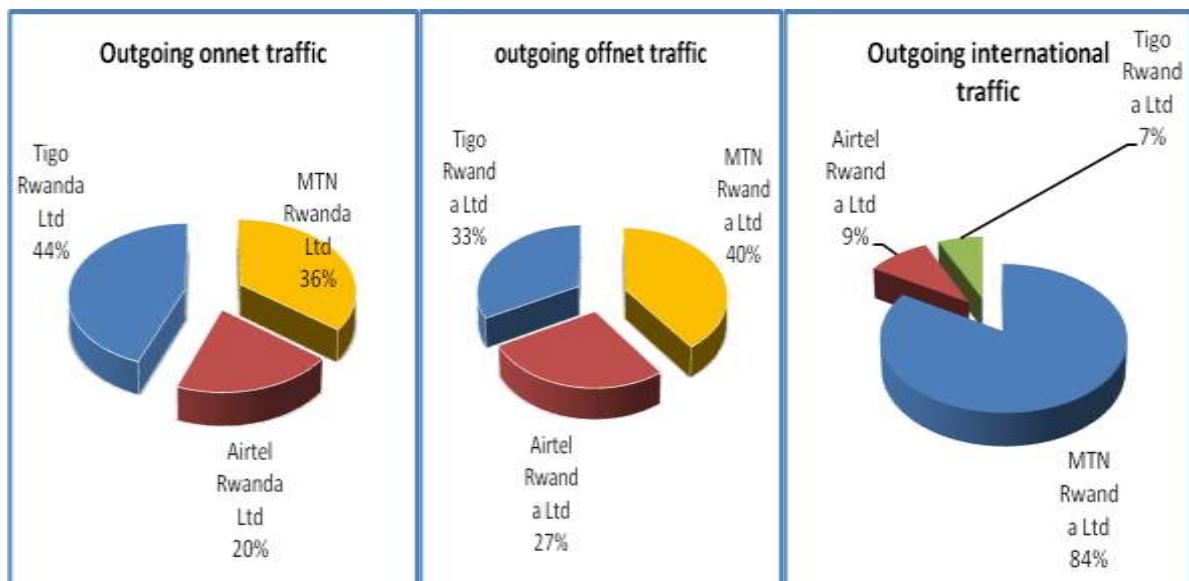
TOTAL OUTGOING AND INCOMING ROAMING TRAFFIC (IN MINUTES)

Table 6. Outgoing and Incoming Roaming traffic as of June 2015 per operator

	Airtel Rwanda Ltd	MTN Rwanda Ltd	Tigo Rwanda Ltd	Total
Incoming	4,952,326	3,806,024	417,601	9,175,951
Outgoing	5,974,745	1,011,593	3,172,653	10,158,991

Source: RURA operators' returns

Table 7: Outgoing on net, off net and international voice traffic market share per operator as of June 2015



SMS TRAFFIC

Table 8. SMS traffic per operator as of June 2015

	MTN Rwanda Ltd	TIGO Rwanda Ltd	Airtel Rwanda Ltd	Total
Outgoing traffic				
On Net	64,801,444	12,457,910	37,024,108	114,283,462
Off Net	2,802,492	1,894,935	1,109,708	5,807,135
International	1,191,673	966,772	37,024,108	39,182,553
Incoming Traffic				
Off Net	1,608,388	2,198,439	7,516,212	11,323,039
International	12,229,102	649,842	7,516,212	20,395,156

Source: RURA operators' returns

INTERNET SERVICE PROVISION

Table 9. Licensed internet service providers as of June 2015

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

INTERNET SUBSCRIBERS

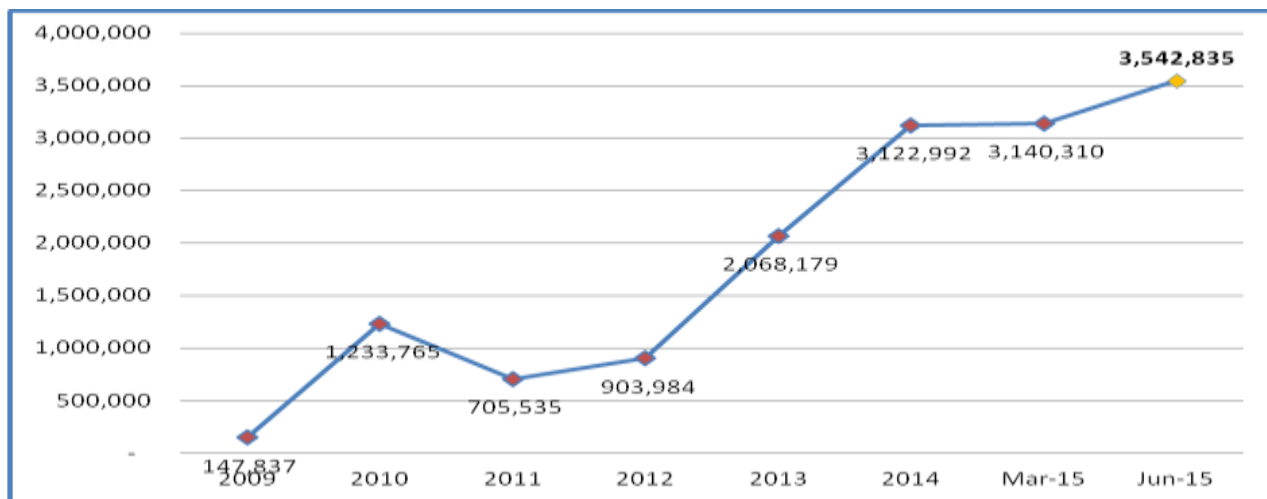
The table below illustrates the breakdown of internet subscribers per category and per operator

Table 10. [Internet subscribers per category per operator as of June 2015](#)

	Fixed internet		Mobile Internet	Total internet subscribers
	Narrowband(≤ 256kbps)	Broadband(≥ 256kbps)		
Liquid Telecom Ltd	39	533		572
MTN Rwanda Ltd	372	18,162	1,490,117	1,508,651
TIGO Rwanda Ltd		102	1,505,786	1,505,888
New Artel Ltd	16	45		61
ISPA Ltd	37	95		132
4G Networks Ltd		45		45
BSC Ltd		1,463		1,463
Axiom Networks Ltd		89		89
Airtel Rwanda Ltd		14	525,920	525,934
Total	464	20,548	3,521,823	3,542,835

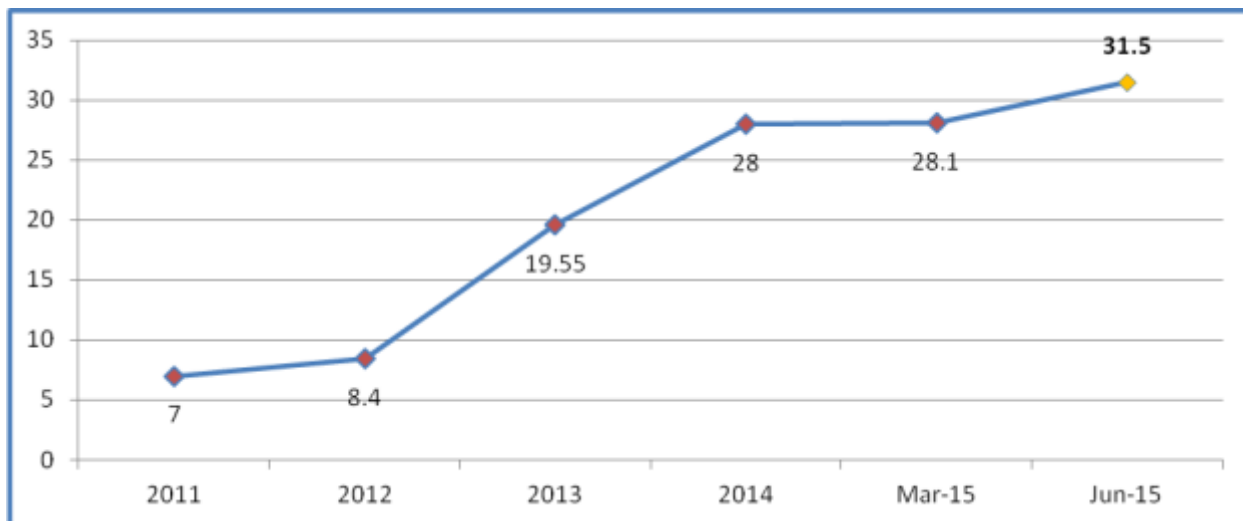
Source: RURA operators' returns

Figure 8. [Trend in total internet Subscribers as of June 2015](#)



Source: RURA operators' returns

Figure 9. Internet penetration rate trend as of June 2015



Source: RURA operators' returns

Table 11: Fixed and Mobile broadband in the last two quarters 2015

Fixed and Mobile Broadband	Mar-15	Jun-15
Mobile Broadband	2,515,689	2,606,911
Fixed broadband	20,360	20,548
Total	2,536,049	2,627,459

Table 12: Smart Phone Users in the last two quarters

	Mar-15	Jun-15
MTN Rwanda Ltd	256,140	349,358
Tigo Rwanda Ltd	125,925	129,155

Airtel Rwanda Ltd	37,824	109,844
Total	419,889	588,357

Figure 10: Mobile Internet Subscribers market share as of the last two quarters 2015

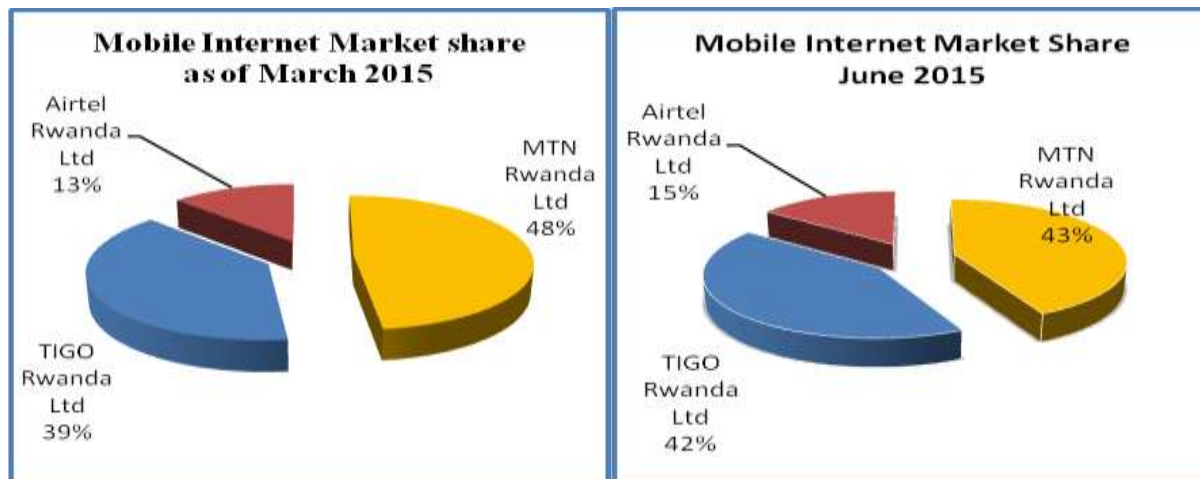
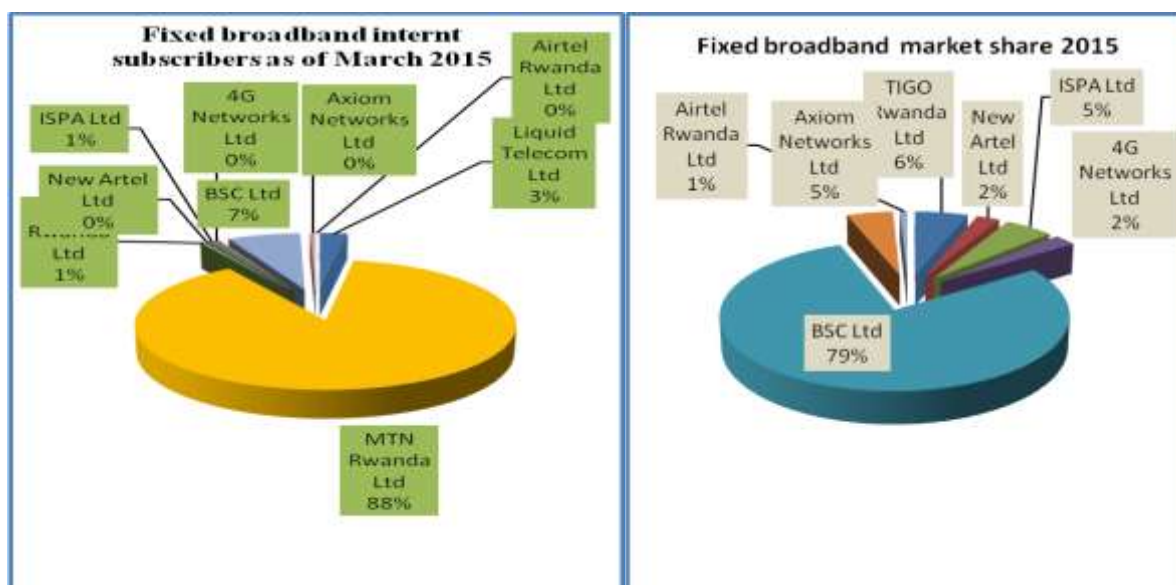


Figure 11: Fixed broadband internet subscribers market share for the last two quarters 2015



Source: RURA operators' returns

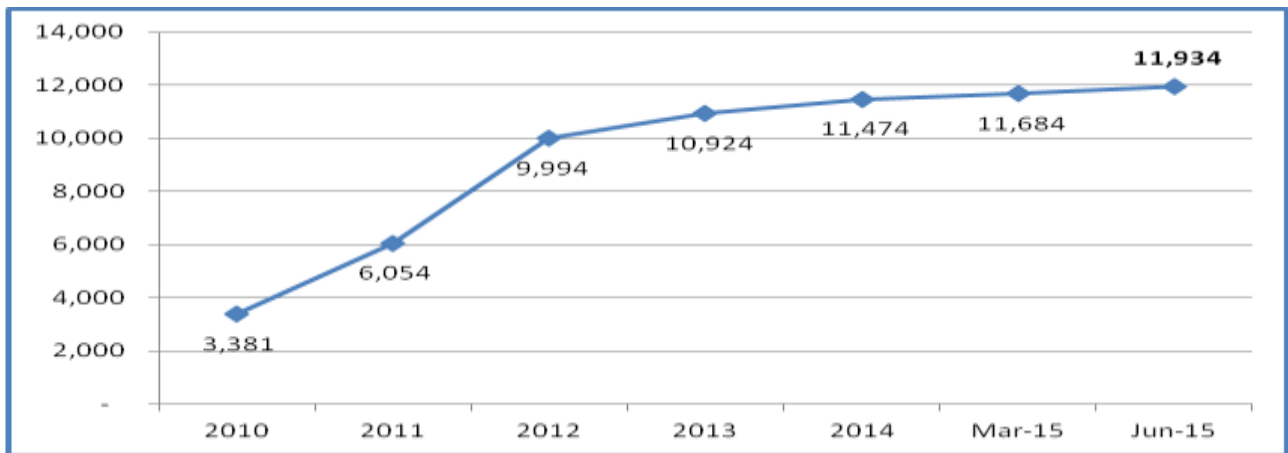
INTERNATIONAL INTERNET BANDWIDTH

Table 13: International internet bandwidth (Mbps) per operator as of June 2015

Type	MTN Rwanda Ltd	Liquid Telecom Ltd	New Artel Ltd	Tigo Rwanda Ltd	ISPA	4G Networks Ltd	Axiom Network Ltd	BSC	Total
UP link	1397	1000	60	750	90	110	120	2440	11,934
Down Link	1397	1000	60	750	90	110	120	2440	

Source: RURA operators' returns

Figure 12: Trend in International Internet bandwidth

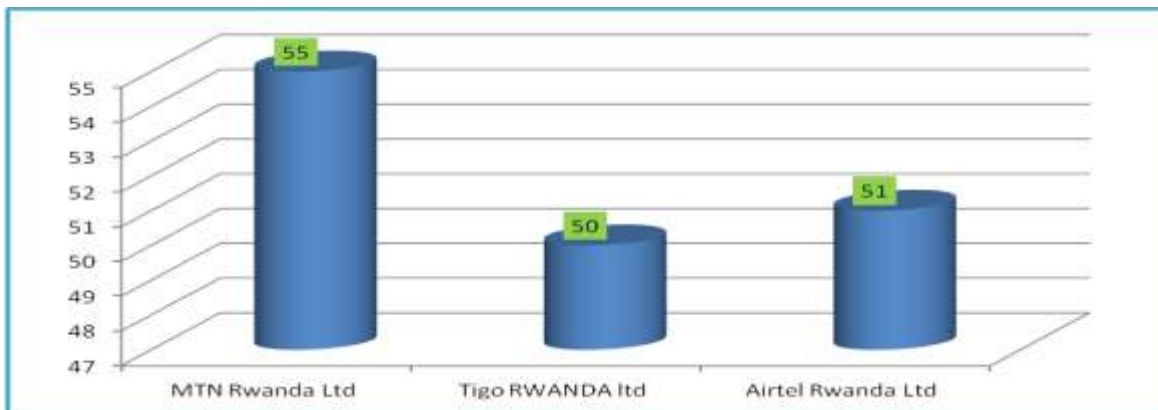


Source: RURA operators' returns

INTERNET TARIFF

MOBILE INTERNET TARIFF

Figure 13. Standard mobile Internet tariff (Rwf/Mb) as of June 2015



MTN Rwanda Ltd mobile data tariff per Mb increased from 51Rwf to 55 Rwf, that of Airtel increased from 50Rwf to 51Rwf per Mb and that of Tigo remained unchanged.

FIXED INTERNET TARIFF

Table 14. Fixed Internet tariffs per operator as of June 2015 (In Rwf VAT inclusive)

Fixed Internet Tariffs in Rwf, VAT Inclusive

		Liquid Telecom Ltd	MTN Rwanda Ltd	Tigo Rwanda Ltd	ISPA	New Artel Ltd	BSC	Axiom Networks Ltd	4G Networks 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					
	5Mbps Dedicated						180,000	594,723	743,400
	4Mbps			840,000					
5Mbps			1,050,000						
6Mbps			1,260,000						
7Mbps			1,470,000						
8Mbps			1,680,000						
9Mbps			1,890,000						
10Mbps			2,100,000						
Fiber	64 Kbps	50,150							
	128Kbps	100,300							
	256Kbps	141,600							
	512Kbps	177,000	210,000				270,000		
	1Mbps	354,000							
	2Mbps	590,000							
	3Mbps	826,000					630,000		

	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 country	268,933					
	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: Telecom Revenues in the second quarter 2015 in (Rwf)

	Quarterly revenue in Rwf
Revenues	33,987,689,726

Table 16: Telecom Investment in the second quarter 2015 in (Rwf)

	Quarterly Investment in Rwf
Investment	15,214,769,016

EMPLOYMENT IN TELECOMMUNICATION SECTOR

1,017 people are employed in Telecommunication sector, 715 are permanent staffs and 302 are temporary staffs. Of these staff 23% are women and 77% are male as it is shown in the following figure;

Table 17: Number of staffs employed in Telecommunication sectors as of June 2015

	Temporary	Female	Foreign	Permanent	Total staff
MTN Rwanda Ltd	18	76	3	238	241
Tigo Rwanda Ltd	160	82	17	215	375
Airtel Rwanda Ltd	70	51	17	100	185
Liquid Telecom Ltd	34	9	4	65	99
BSC Ltd	11	6	0	12	23
4G Networks Ltd	5	2	0	2	7
ISPA Ltd	0	3	0	19	19
New Artel Ltd	0	4	1	40	40
Axiom Networks Ltd	4	1	0	24	28
Total	302	234	42	715	1017

Source: RURA operators' returns

Figure 14: Employment status in Telecommunication Sector (by gender) as of June 2015

