Rwanda - Telecoms, Mobile and Broadband - Statistics and Analyses

Description: Rwandan buses equipped with LTE routers as part of a Smart Kigali initiative

The Rwandan telecom continues to develop strongly, buttressed by sustained GDP growth which has seen the country develop one the fastest-growing economies in the world. Supported by significant foreign aid, this growth has been buttressed by prudent fiscal and monetary policies which have create a business-friendly environment conducive to investment.

Nevertheless, poverty remains widespread. There is little economic diversity, with up to 99% of the population engaged in agriculture and in the mineral and agro-processing sectors. The financial services sector is also underdeveloped: with banks focussed on government borrowing there is little attention paid to the support of small businesses, and most of the population has little or no access to conventional banking services. In turn, this has made Rwanda one of the more successful markets on the continent for mobile banking and payment services.

Although the country was slow to liberalise the mobile sector, allowing South Africa's MTN a monopoly until 2006 when the fixed-line incumbent, Rwandatel (since acquired by Liquid Telecom) became the second mobile operator, there is effective competition among the three current operators, each of which provides wide geographic coverage. The launch of services from Tigo in 2009 sparked renewed subscriber growth, though competition has eroded mobile services revenue and ARPU since then. The number of mobile subscribers increased by only 1.4% in the first quarter of 2016.

Rwanda's internet and broadband sector has suffered from limited fixed-line infrastructure and high prices, but developments in the fixed network market are improving connectivity and reliability. The operators are rolling out national fibre-optic backbone networks which also allow them to connect to the international submarine fibre-optic cables on the African east coast. These cables have given the entire region fibre-based international bandwidth for the first time and brought to an end its dependency on satellites. In early 2016 Liquid Telecom was able to expand its FtP services across areas of the capital Kigali, with a view to extending fibre-based services to a number of towns by the end of the year.

Interest from investors in the country's ICT sector remains strong. A deal with Korea Telecom has developed a wholesale LTE operator, ORN, which now provides retail services to a number of fixed-line operators as well as to the mobile network operators.

This report contains an overview and analysis of Rwanda's telecommunications market, profiles of the major players in all market sectors, relevant statistics and analysis, and scenario forecasts to 2021 for the country's mobile market.

Key developments:
- Liquid Telecom expands FtP network in Kigali; fleet of buses equipped with LTE routers to provide mobile broadband for passengers; Kenya, Uganda and Rwanda agree on SMS price cap; government launches initiatives to expand use of mobile broadband nationally; regulator calls for interested parties to manage Mobile Number Portability facility; MNnos implement One Network Area scheme removing roaming charges between Uganda, Kenya and Rwanda; Smart Africa Alliance Initiative to raise $300 billion by 2020 for regional ICT infrastructure; MTN Rwanda and Tigo Rwanda offering LTE for smartphone users; Rwanda Olleh Networks (ORN) launches wholesale LTE services; Liquid Telecom completes East Africa Fibre Ring; government increases telecom tax to 10%; Tigo launches cross-border money transfer service for Tigo Pesa users in Tanzania and Rwanda; report update includes the regulator's market data to May 2016, telcos' operating data to Q1 2016, recent market developments.

Market penetration rates in Rwanda's telecoms sector 2015 (e)

<table>
<thead>
<tr>
<th>Market</th>
<th>Penetration rate</th>
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</thead>
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<tr>
<td>Fixed-line telephony</td>
<td>0.1%</td>
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<tr>
<td>Fixed internet</td>
<td>29%</td>
</tr>
<tr>
<td>Mobile SIM (population)</td>
<td>78%</td>
</tr>
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</table>

(Source: based on various sources)

Companies mentioned in this report:
Rwandatel (Terracom, LapGreen); MTN Rwanda; Liquid Telecom; Millicom (Tigo); Bharti Airtel; Artel Communications; Electrogaz.

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Exhibit 1 e-Soko
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