

QUARTERLY COMMUNICATIONS STATISTICS

A QUARTER ENDING DECEMBER 2014

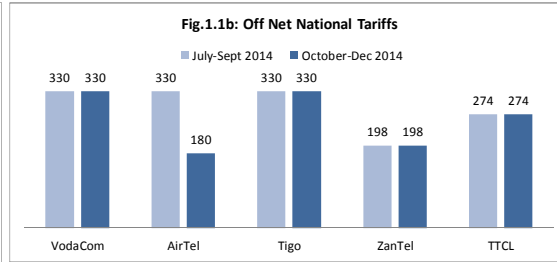
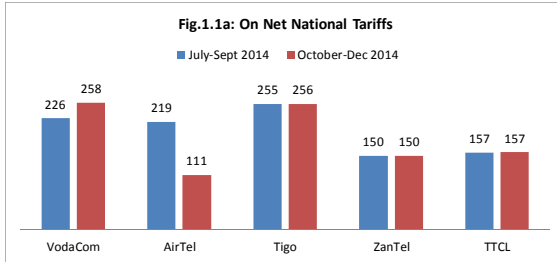
1. Basic Voice Prepaid Tariffs (Without TAX)

1.1 Weighted Prepaid Tariffs per Operators (Tshs)

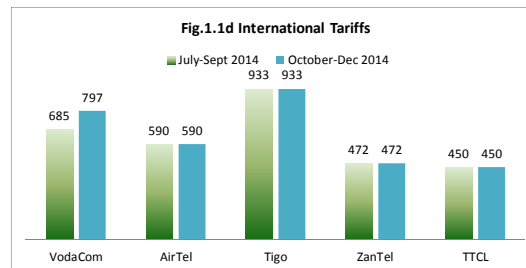
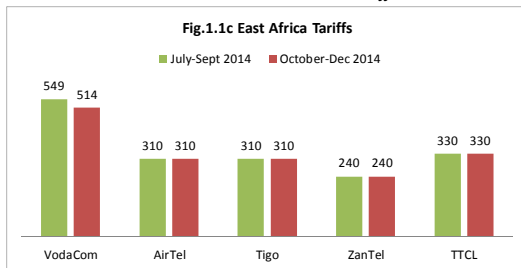
July-Sept 2014	VodaCom	AirTel	Tigo	ZanTel	TTCL
On Net Calls	226	219	255	150	157
Off Net calls	330	330	330	198	274
East Africa calls	549	310	310	240	330
International Calls	685	590	933	472	450
SMS National	50	45	49	50	47
SMS International	100	100	98	100	100
October-Dec 2014	VodaCom	AirTel	Tigo	ZanTel	TTCL
On Net Calls	258	111	256	150	157
Off Net calls	330	180	330	198	274
East Africa calls	514	310	310	240	330
International Calls	797	590	933	472	450
SMS National	50	45	49	69	47
SMS International	100	100	98	138	100

NOTE: For more tariffs in BUNDLES, please visit operators website or try to subscribe to *148*01# for Tigo, *149*99# for Airtel, *149*01# for Vodacom

1.1a & b: National Tariffs



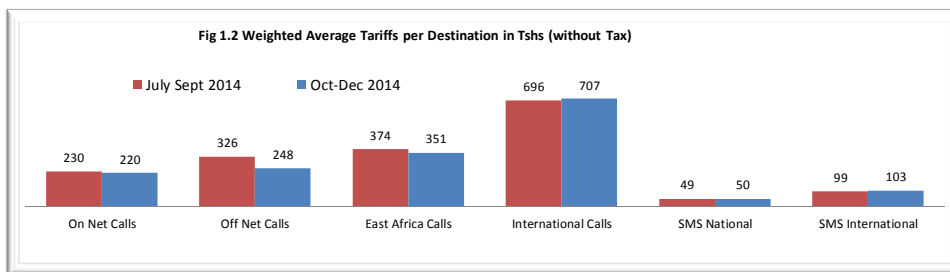
1.1c & d: International Tariffs



1.2 Weighted Average Tariffs per Destination (WAD) Tshs

These are estimated charges incurred on average per each call destination. They are obtained by weighting the tariffs per operator with its market shares on traffic

	On Net Calls	Off Net Calls	East Africa Calls	International Calls	SMS National	SMS International	Aggregate Tariff (Voice)	Aggregate Tariff (SMS)
July Sept 2014	230	326	374	696	49	99	247	49
Oct-Dec 2014	220	248	351	707	50	103	254	50

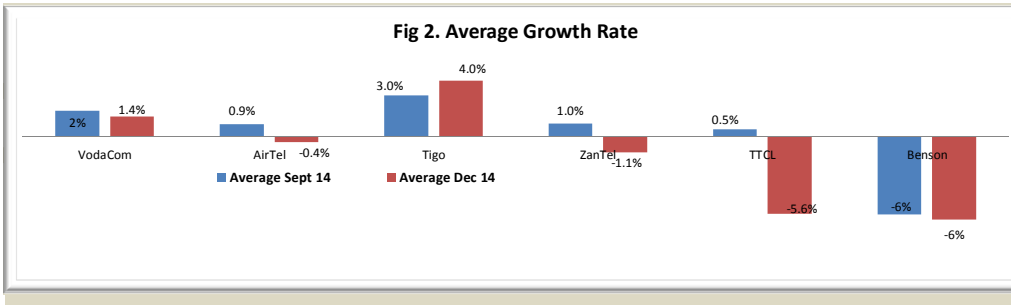


2. Voice Telecom Subscriptions

2.1 Subscriptions per Operator

	VodaCom	AirTel	Tigo	ZanTel	TTCL	Benson	TOTAL
July 2014	10,896,370	9,375,053	7,191,952	1,747,745	289,640	593	29,501,353
August 2014	11,110,134	9,477,272	7,397,265	1,762,969	291,635	550	30,039,825
Sept 2014	11,316,301	9,546,135	7,643,219	1,781,590	292,836	528	30,580,609
Oct 2014	11,470,160	9,576,810	7,940,696	1,768,241	329,470	593	31,085,970
Nov 2014	11,651,677	8,931,339	8,295,638	1,723,649	294,543	550	30,897,396
Dec 2014	11,810,064	9,551,977	8,624,638	1,730,105	296,618	528	32,013,930

Fig 2. Average Growth Rate



2.3 Quarterly Operator's Subscriptions Market Shares

Fig.2.3b Subscription Market Share (September 2014)

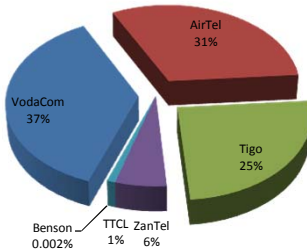
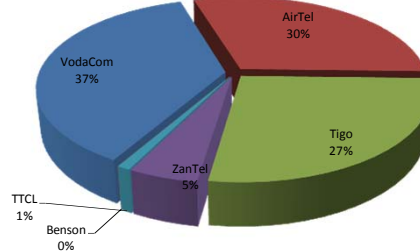


Fig.2.3a Subscription Market Share (Dec 2014)

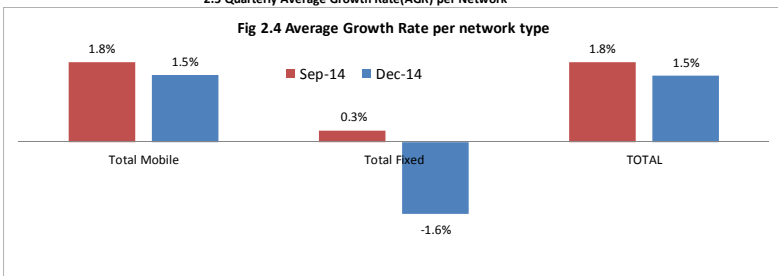


2.4 Subscriptions to Fixed and Mobile Networks

	Total Mobile	TTCL Fixed	ZanTel Fixed	Total Fixed	TOTAL
July 2014	29,351,994	140,756	8,603	149,359	29,501,353
August 2014	29,889,922	140,782	9,121	149,903	30,039,825
Sept 2014	30,430,460	140,526	9,623	150,149	30,580,609
October 2014	30,929,534	146,369	10,067	156,436	31,085,970
November 2014	30,746,779	140,139	10,478	150,617	30,897,396
December 2014	31,862,656	140,391	10,883	151,274	32,013,930

2.5 Quarterly Average Growth Rate(AGR) per Network

Fig 2.4 Average Growth Rate per network type



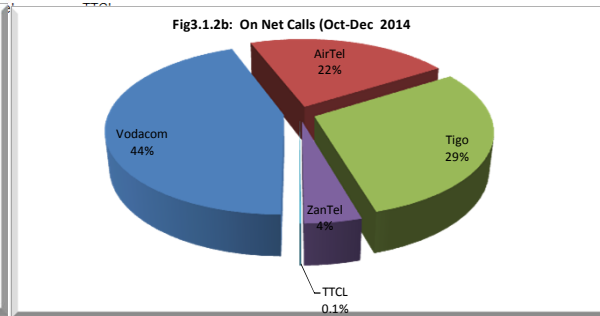
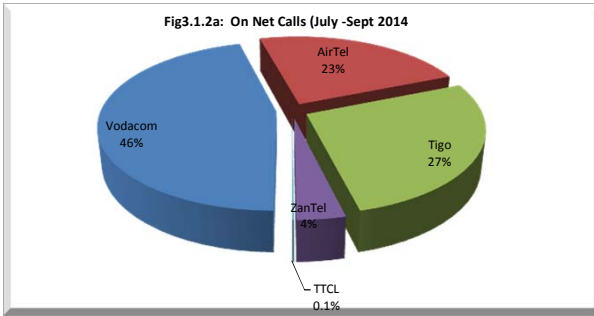
3. Traffic Calls (Minutes)

3.1 National Traffic

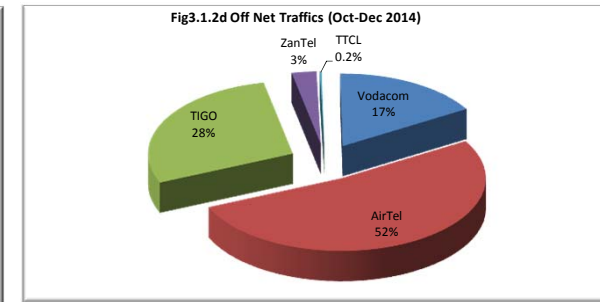
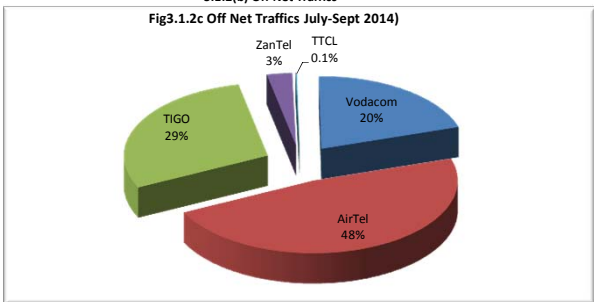
	July-Sept 2014	Oct-Dec 2014	Change
On Net Calls	9,536,337,832	9,789,507,039	3%
Off Net Calls	1,659,542,862	1,700,490,422	2%
Total	11,195,880,694	11,489,997,461	3%

3.1.2 Quarterly National Traffic Operator's Market Share

3.1.2(a) On Net Traffics



3.1.2(b) Off Net Traffics

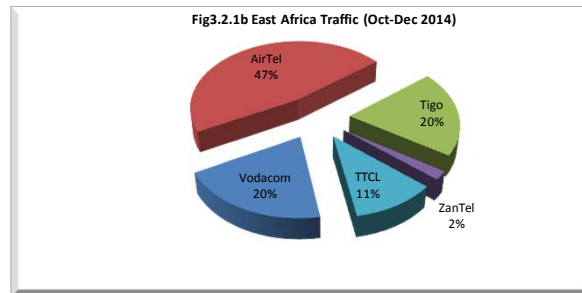
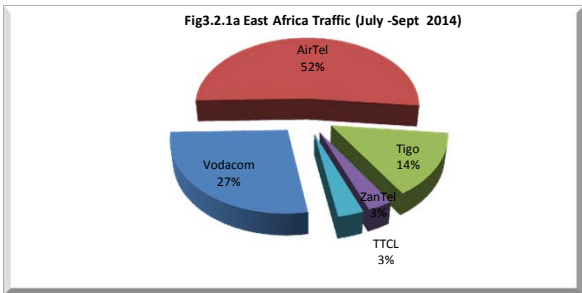


3.2. International Traffic

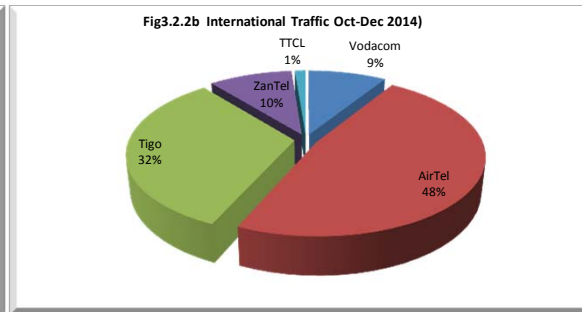
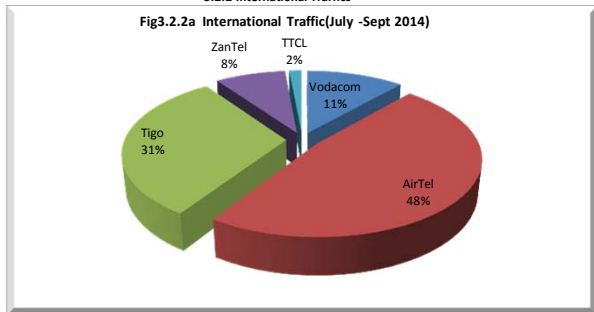
	July-Sept 2014	Oct-Dec 2014	Change
To East Africa	13,050,908	14,609,762	12%
From East Africa	11,440,791	16,049,930	40%
To other Internationals	42,685,740	45,089,323	6%
From other Internationa.	50,285,694	48,462,905	-4%

3.2.1 Quarterly International Traffic Operator's Market Share

3.2.1 East Africa Traffics



3.2.2 International Traffics

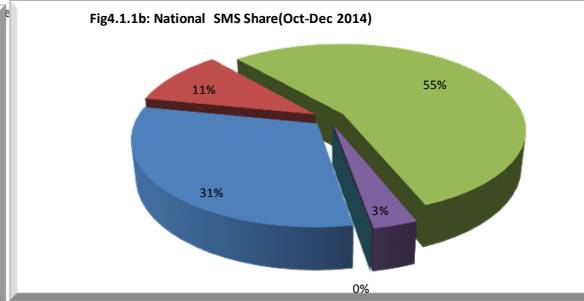
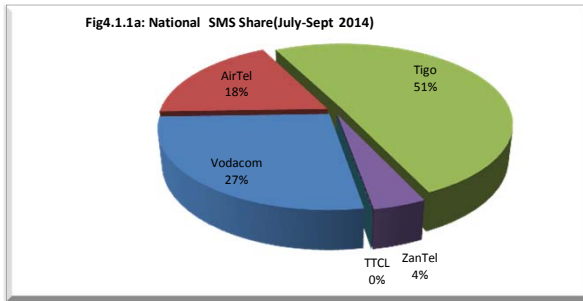


4. Data (SMS)

4.1 National Traffic

	July-Sept 2014	Oct-Dec 2014	Change
On Net SMS	5,976,645,423	6,973,139,324	17%
Off Net SMS	3,660,295,429	3,335,055,136	-9%

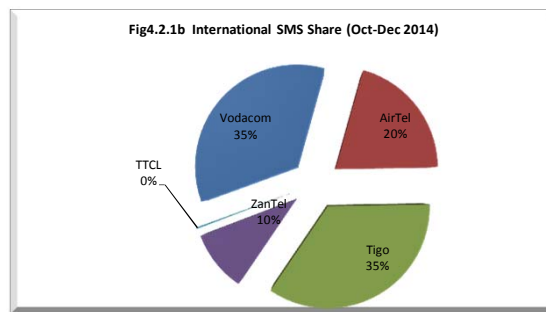
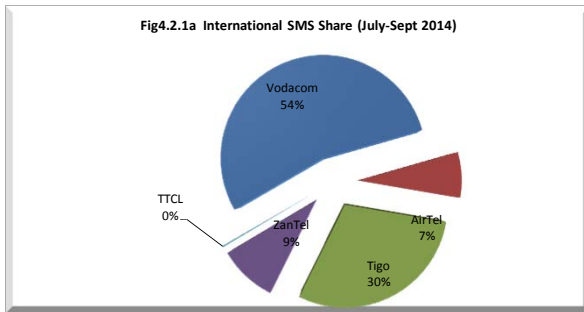
4.1.1 Quarterly national SMS Operator's Market Share



4.2 International Traffic

	July-Sept 2014	Oct-Dec 2014	Change
SMS to International	6,718,006	5,519,577	-18%
SMS from International	209,716,552	217,629,919	4%

4.2.1 Quarterly International SMS Operator's Market Share



5. Average Usage of Voice and SMS per quarter

	No. Minutes Per User	No. SMS Per User	ARPU Voice	ARPU SMS	Total ARPU	ARPU/ Month
July Sept 2014	375	321	Tshs 92,513	Tshs 15,730	Tshs 108,243	Tshs 36,081
Oct-Dec 2014	369	329	Tshs 91,049	Tshs 16,129	Tshs 107,178	Tshs 35,726

6. SIMCARD Registration

6.1 Registered as at September 2014

	Vodacom	AirTel	Tigo	ZanTel	TTCL	Benson	Total
Total Mobile Subscriptions	11,810,064	9,551,977	8,624,638	1,719,222	156,227	528	31,862,656
Registered Subscriptions	11,679,687	8,951,270	8,617,118	1,719,222	156,227	528	31,124,052
% Registered	99%	94%	99.9%	100%	100%	100%	98%

7. SUMMARY OF COMMUNICATIONS STATISTICS

7.1 TELECOM SERVICES

7.1a Subscriptions and Teledensity

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Fixed	154,420	151,644	163,269	123,809	172,922	174,511	161,063	176,367	164,999	151,274
Mobile	2,963,737	5,614,922	8,322,857	13,006,793	17,469,486	20,983,853	25,666,455	27,450,789	27,442,823	31,862,656
Total	3,118,157	5,766,566	8,486,126	13,130,602	17,642,408	21,158,364	25,827,518	27,627,156	27,607,822	32,013,930
Penetration	10%	15%	21%	32%	43%	50%	59%	61%	61%	67%

Fig7.1 Trend of Mobile and Fixed Subscription

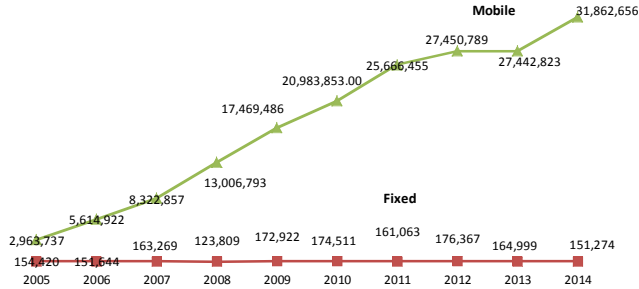
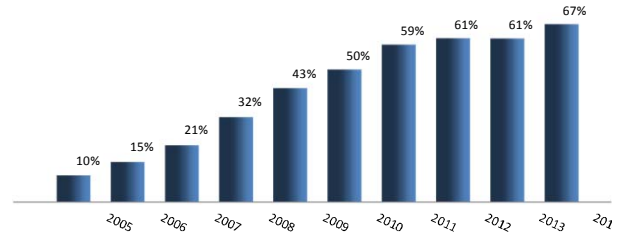


Fig7.2 Teledensity (Penetration)

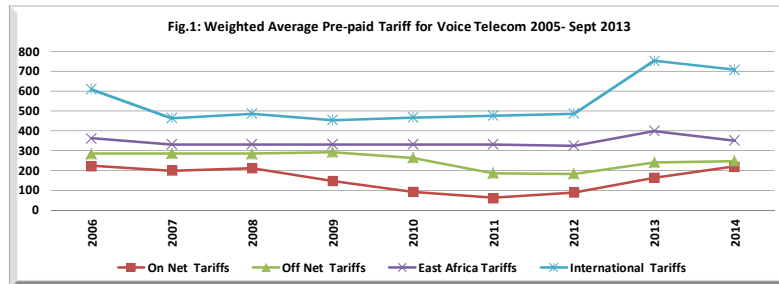


7.1b Traffic (in minutes)

Years	2006	2007	2008	2009	2010	2011	2012	2013	2014
National Traffic (On & Off Net)	506,073,994	2,776,662,168	5,658,864,021	9,155,095,552	15,371,971,955	18,520,867,990	24,354,279,292	34,934,613,363	41,689,212,148
Traffic to International	22,623,483	102,072,070	160,481,940	135,579,347	157,599,602	171,431,668	201,827,164	198,116,642	234,080,182
Traffic from International	52,744,995	227,382,897	271,220,442	284,284,629	275,568,097	287,625,871	253,811,569	229,961,296	258,420,938
Traffic to East Africa	4,569,580	26,602,014	47,589,636	45,516,586	49,986,404	46,490,973	67,648,652	42,535,489	53,329,431
Traffic from East Africa	3,597,498	21,955,453	33,485,451	63,999,950	71,714,452	87,634,397	68,978,489	56,624,940	54,174,595
Traffic to Other International	18,055,903	75,470,056	112,892,304	90,062,761	107,613,199	124,940,695	134,178,512	155,581,153	180,750,751
Traffic from Other International	49,147,498	205,427,443	237,734,991	220,284,679	203,853,644	199,991,475	184,833,080	173,336,356	204,246,343

7.1c Weighted Average Prepaid Tariff for voice Telecom (without Tax)

Years	2006	2007	2008	2009	2010	2011	2012	2013	2014
On Net Tariffs	223	199	212	147	93	62	89	165	220
Off Net Tariffs	284	286	284	292	263	187	182	240	248
East Africa Tariffs	362	331	332	332	330	331	326	399	351
International Tariffs	608	465	485	453	468	476	485	752	707



7.2 INTERNET SERVICES

7.2a Internet Subscribers by subscriptions type

	2008	2009	2010	2011	2012	2013	2014
Internet Cafes	350	599	736	602	636	652	664
Organizations/Institutions	3,055	3,235	3,329	3,323	3,245	3,952	4,003
Household/Individuals	248,433	393,688	533,090	567,487	1,133,417	1,429,588	1,929,125
TOTAL	251,838	397,522	537,155	571,412	1,137,298	1,434,192	1,933,792

7.2b Estimates of Internet Users by Subscription type

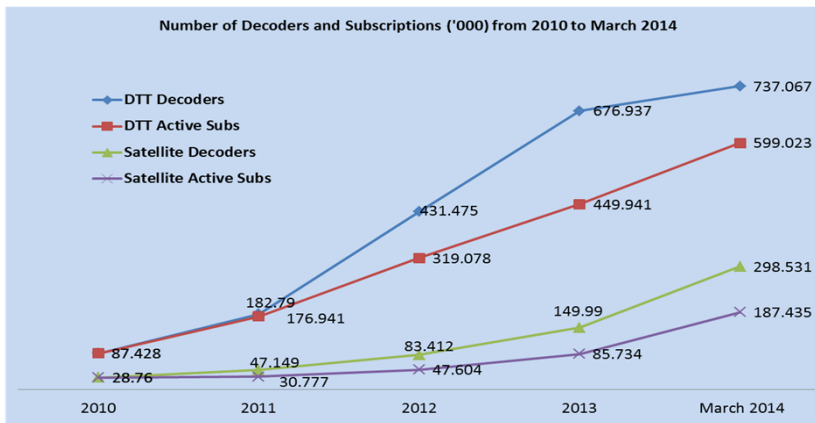
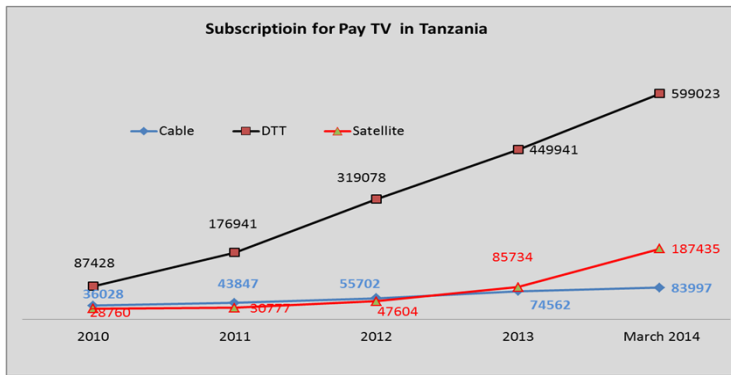
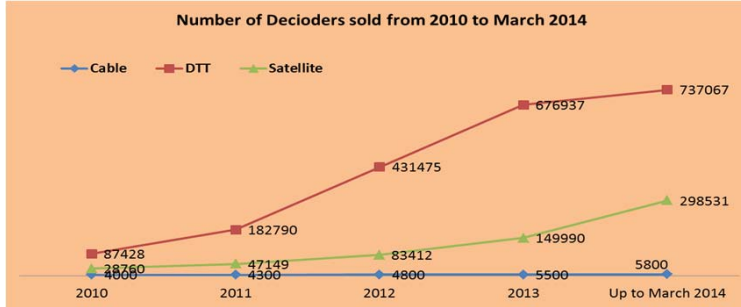
	2008	2009	2010	2011	2012	2013	2014
Internet Cafes	126,000	215,640	264,960	216,720	228,960	234,720	239,040
Organizations/Institutions	2,444,000	2,588,000	2,663,200	2,824,550	2,758,250	3,359,200	3,402,550
Household/Individuals	993,732	1,574,752	2,132,360	2,269,948	4,533,668	5,718,352	7,716,500
TOTAL	3,563,732	4,378,392	5,060,520	5,311,218	7,520,878	9,312,272	11,358,090

7.3 BROADCASTING SERVICES

7.3a Number of Broadcasting Service Providers

	2008	2009	2010	2011	2012	2013
Free To Air (FTA)	21	22	23	23	23	23
Satellite TV	1	1	1	2	3	3
Pay DTT	-	1	1	3	5	3
Cable TV	7	9	15	15	15	15
Total	29	33	40	43	46	44

7.3b Pay Tv Services



7.4 POSTAL SERVICES

7.4a Number of Postal Services Providers

	2008	2009	2010	2011	2012	2013
Licensed Operators	45	50	56	51	51	31

7.4b Number of Postal Items from 2008 to 2013

	2008	2009	2010	2011	2012*	2013*
Letter Mails	17,377,123	22,141,055	24,085,151	11,752,489	18,455,799	18,564,838
Parcels	48,539	27,732	23,458	25,416	19,196	14,914
Documents	303,290	496,583	536,821	639,602	690,298	768,486
Total	17,728,952	22,665,370	24,645,430	12,417,507	19,165,293	19,348,238

* Estimates

