

QUARTERLY TELECOM STATISTICS

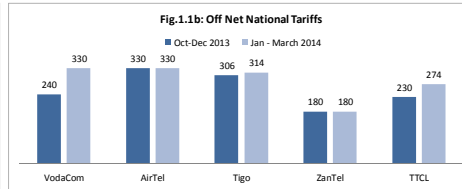
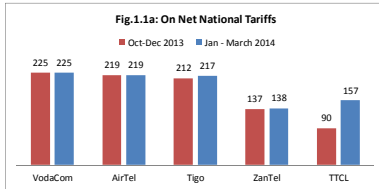
Quarter 3 (March 2014) Report

1. Voice Prepaid Tariffs (Without TAX)

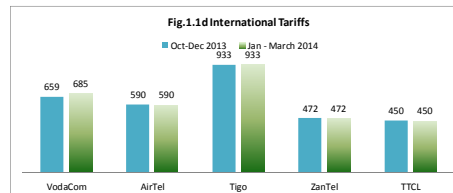
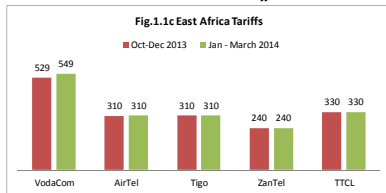
1.1 Weighted Prepaid Tariffs per Operators (Tshs)

	VodaCom	AirTel	Tigo	ZanTel	TTCL
Oct-Dec 2013					
On Net Calls	225	219	212	137	90
Off Net calls	240	330	306	180	230
East Africa calls	529	310	310	240	330
International Calls	659	590	933	472	450
SMS National	50	45	49	50	0
SMS International	100	100	98	100	0
Jan - March 2014					
On Net Calls	225	219	217	138	157
Off Net calls	330	330	314	180	274
East Africa calls	549	310	310	240	330
International Calls	685	590	933	472	450
SMS National	50	45	49	50	0
SMS International	100	100	98	100	0

1.1a & b: National Tariffs



1.1c & d: International Tariffs

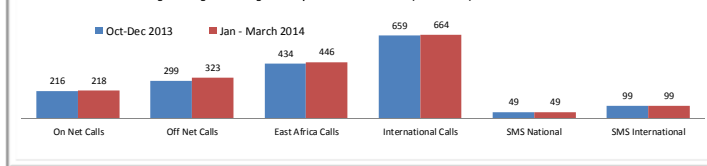


1.2 Weighted Average Tariffs per Destination (WAD) Tshs

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)
Oct-Dec 2013	216	299	434	659	49	99	237	49
Jan - March 2014	218	323	446	664	49	99	243	50

Fig 1.2 Weighted Average Tariffs per Destination in Tshs (without Tax)

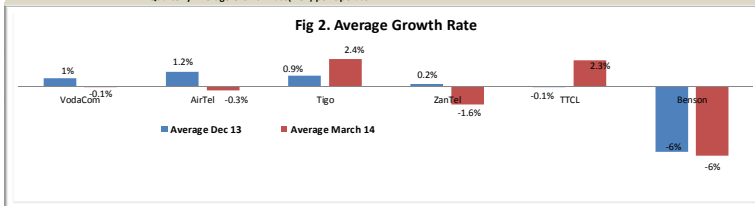


2. Voice Telecom Subscriptions

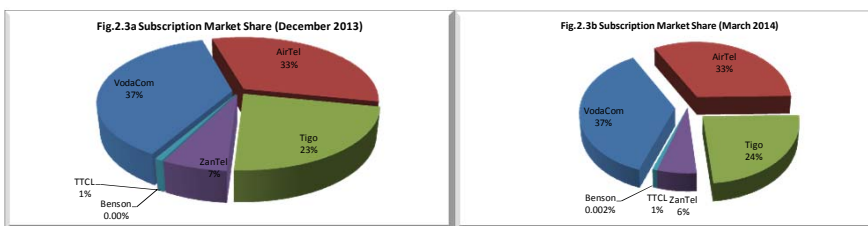
2.1 Subscriptions per Operators

	VodaCom	AirTel	Tigo	ZanTel	TTCL	Benson	TOTAL
Oct 2013	10,149,970	8,772,285	6,183,074	1,807,211	211,038	593	27,124,171
Nov 2013	10,239,188	8,772,285	6,231,840	1,814,901	210,766	550	27,269,530
Dec 2013	10,288,972	8,995,824	6,297,288	1,814,444	210,766	528	27,607,822
Jan 2014	10,296,433	9,236,384	6,399,664	1,801,677	210,766	593	27,945,517
Feb 2014	10,281,911	9,197,231	6,536,159	1,828,765	218,887	550	28,063,503
March 2014	10,283,927	9,173,414	6,713,845	1,748,075	220,668	528	28,140,457

2.2 Quarterly Average Growth Rate (AGR) per Operator



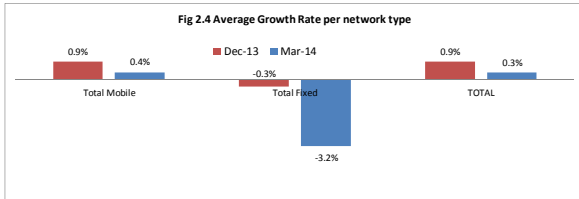
2.3 Quarterly Operator's Subscriptions Market Shares



2.4 Subscriptions to Fixed and Mobile Networks

	Total Mobile	TTCL Fixed	ZanTel Fixed	Total Fixed	TOTAL
Oct 2013	26,959,044	159,267	6,860	166,127	27,124,171
Nov 2013	27,104,311	158,935	6,284	165,219	27,269,530
Dec 2013	27,442,823	158,935	6,064	164,999	27,607,822
Jan 2014	27,780,777	158,935	5,805	164,740	27,945,517
Feb 2014	27,909,778	148,128	5,597	153,725	28,063,503
March 2014	27,986,314	148,878	5,265	154,143	28,140,457

2.5 Quarterly Average Growth Rate(AGR) per Network



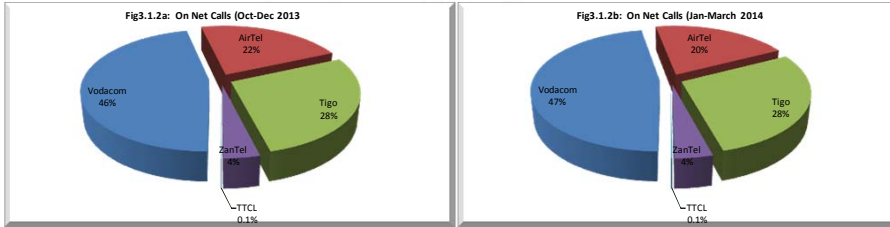
3. Traffic Calls (Minutes)

3.1 National Traffic

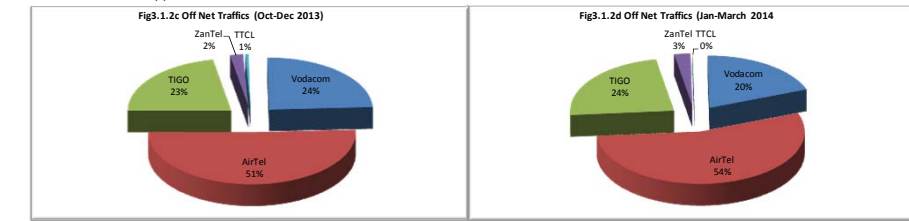
	Oct-Dec 2013	Jan-March 2014	Change
On Net Calls	8,112,284,398	7,562,661,603	-7%
Off Net Calls	1,927,455,068	1,534,420,890	-20%
Total	10,039,739,466	9,097,082,493	-9%

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

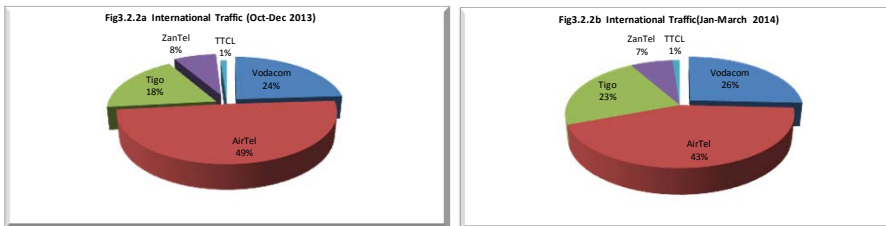
	Oct-Dec 2013	Jan-March 2014	Change
To East Africa	11,884,744	13,243,503	11%
From East Africa	16,084,372	17,495,566	9%
To other Internationals	53,860,779	48,728,875	-10%
From other Internationals	45,184,004	48,076,301	6%

3.2.1 Quarterly International Traffic Operator's Market Share

3.2.1 East Africa Traffics



3.2.2 International Traffics

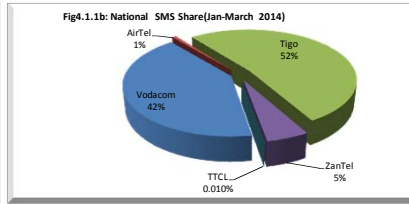
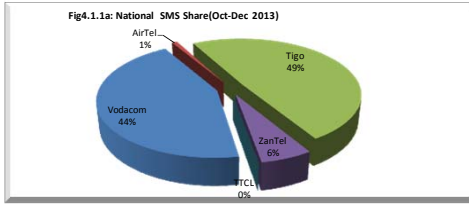


4. Data (SMS & MMS)

4.1 National Traffic

	Oct-Dec 2013	Jan-March 2014	Change
On Net SMS	5,286,606,987	5,097,321,291	-4%
Off Net SMS	1,985,193,818	1,910,909,520	-4%

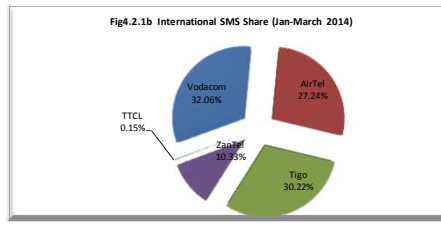
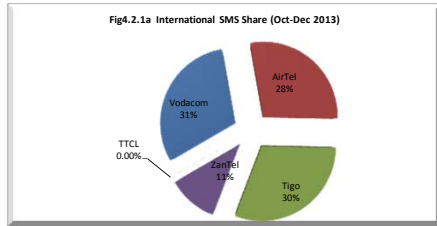
4.1.1 Quarterly national SMS Operator's Market Share



4.2 International Traffic

	Oct-Dec 2013	Jan-March	Change
SMS to International	9,651,251	7,391,762	-23%
SMS from International	193,837,858	163,722,011	-16%

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
Oct-Dec 2013	370	266	Tshs 87,620	Tshs 13,053	Tshs 100,673	Tshs 33,558
Jan - March 2014	327	250	Tshs 79,346	Tshs 12,506	Tshs 91,852	Tshs 30,617

6. SIMCARD Registration

6.1 Registered as at December 2013

	Vodacom	AirTel	Tigo	ZanTel	TTCL	Benson	Total
Total Mobile Subscriptions	10,283,927	9,173,414	6,713,845	1,748,075	220,668	528	28,140,457
Registered Subscriptions	10,197,625	8,725,021	6,704,444	1,735,706	220,668	528	27,583,992
% Registered	99%	95%	99.9%	99%	100%	100%	98%

7. Summary of Trend of Telecom Statistics

7.1 Subscriptions and Teledensity

	2005	2006	2007	2008	2009	2010	2011	2012	2013	March 2014
Fixed	154,420	151,644	163,269	123,809	172,922	174,511	161,063	176,367	164,999	154,143
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	27,986,314
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	28,140,457
Penetration	10%	15%	21%	32%	43%	50%	59%	61%	61%	63%

Fig 7.1 Trend of Mobile and Fixed Subscription

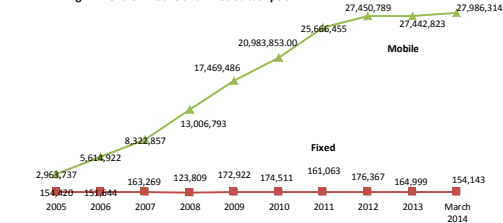
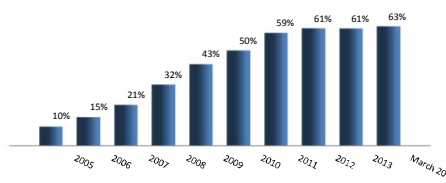


Fig 7.2 Teledensity (Penetration)



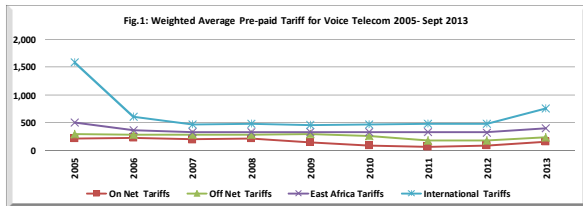
7.2 Traffic (in minutes)

Years	2006	2007	2008	2009	2010	2011	2012	2013
National Traffic (On & Off Net)	506,073,994	2,776,662,168	5,658,804,021	9,155,095,552	15,371,971,955	18,520,867,990	24,354,279,292	34,934,613,363
Traffic to International	22,625,483	102,072,070	160,481,940	135,579,347	157,599,602	171,431,668	201,827,164	198,116,642
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
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
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
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
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

7.3 Weighted Average Prepaid Tariff for voice Telecom (without Tax)

Years	2008	2009	2010	2011	2012	2013
On Net Tariffs	219	223	199	212	93	165
Off Net Tariffs	292	284	286	284	263	240
East Africa Tariffs	499	362	331	332	330	399
International Tariffs	1,580	608	465	485	453	752

Fig 1: Weighted Average Pre-paid Tariff for Voice Telecom 2005- Sept 2013



7.4 Internet Services**7.4(a) Internet Subscribers by subscriptions type**

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

7.4(b) Estimates of Internet Users by Subscription type

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