

QUARTERLY TELECOM STATISTICS

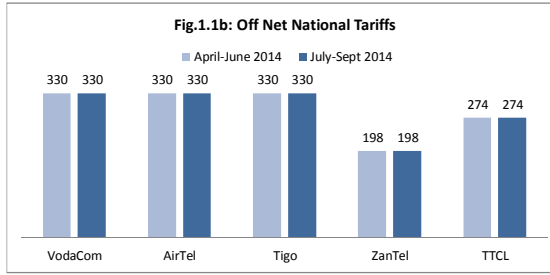
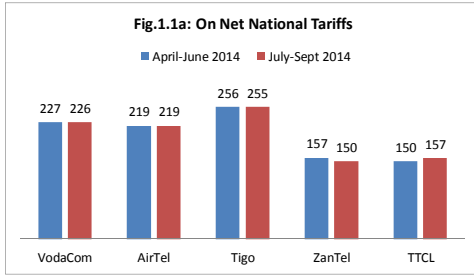
Quarter 3 (Sept 2014) Report

1. Basic Voice Prepaid Tariffs (Without TAX)

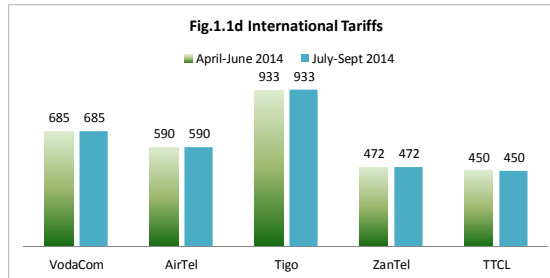
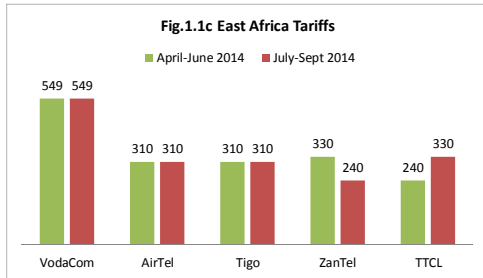
1.1 Weighted Prepaid Tariffs per Operators (Tshs)

April-June 2014	VodaCom	AirTel	Tigo	ZanTel	TTCL
On Net Calls	227	219	256	157	150
Off Net calls	330	330	330	198	274
East Africa calls	549	310	310	330	240
International Calls	685	590	933	472	450
SMS National	50	45	49	47	50
SMS International	100	100	98	100	100
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	330	240
International Calls	685	590	933	472	450
SMS National	50	45	49	50	47
SMS International	100	100	98	100	100

1.1a & b: National Tariffs



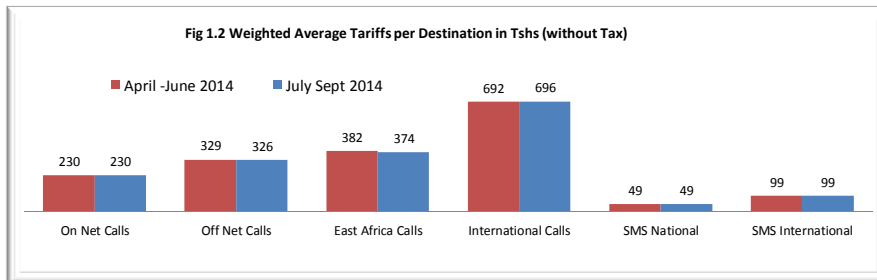
1.1c & d: International Tariffs



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)
April - June 2014	230	329	382	692	49	99	248	50
July Sept 2014	230	326	374	696	49	99	247	49



2. Voice Telecom Subscriptions

2.1 Subscriptions per Operators

	VodaCom	AirTel	Tigo	ZanTel	TTCL	Benson	TOTAL
April 2014	10,311,669	9,173,414	6,792,325	1,674,697	322,020	593	28,274,718
May 2014	10,427,994	9,161,989	6,796,311	1,681,892	286,261	550	28,354,997
June 2014	10,637,520	9,245,778	6,988,165	1,720,651	288,136	528	28,880,778
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

Fig 2. Average Growth Rate

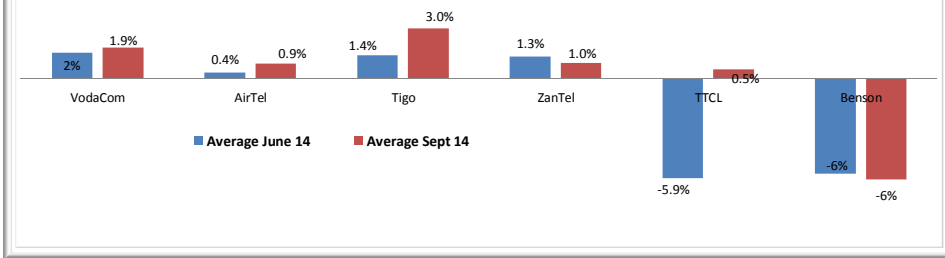


Fig.2.3b Subscription Market Share June 2014)

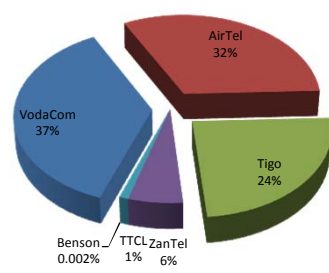
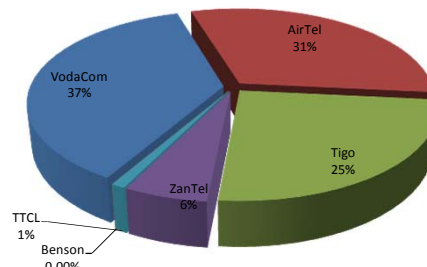


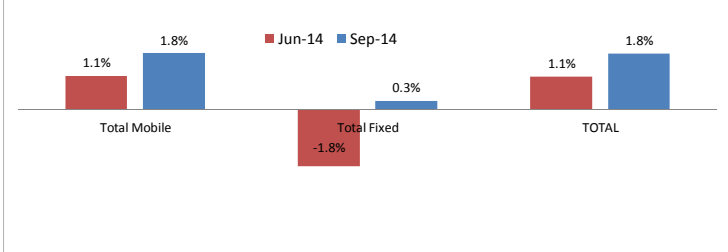
Fig.2.3a Subscription Market Share (September 2014)



2.4 Subscriptions to Fixed and Mobile Networks

	Total Mobile	TTCL Fixed	Zantel Fixed	Total Fixed	TOTAL
April 2014	28,118,875	149,408	6,435	155,843	28,274,718
May 2014	28,205,692	142,093	7,212	149,305	28,354,997
June 2014	28,730,705	142,153	7,920	150,073	28,880,778
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

Fig 2.4 Average Growth Rate per network type



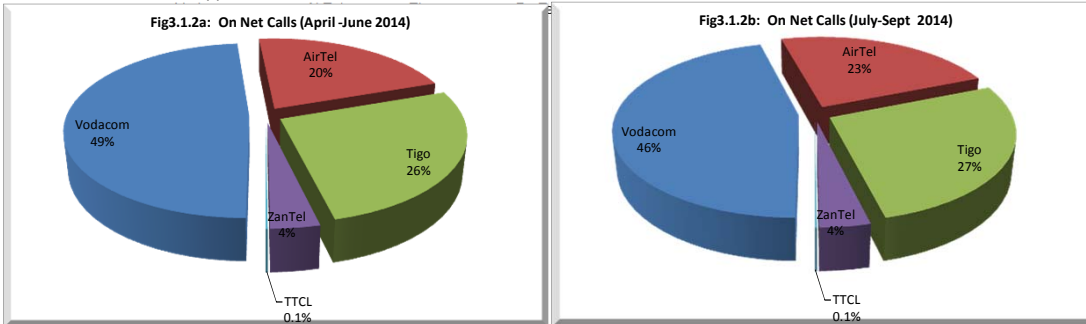
3. Traffic Calls (Minutes)

3.1 National Traffic

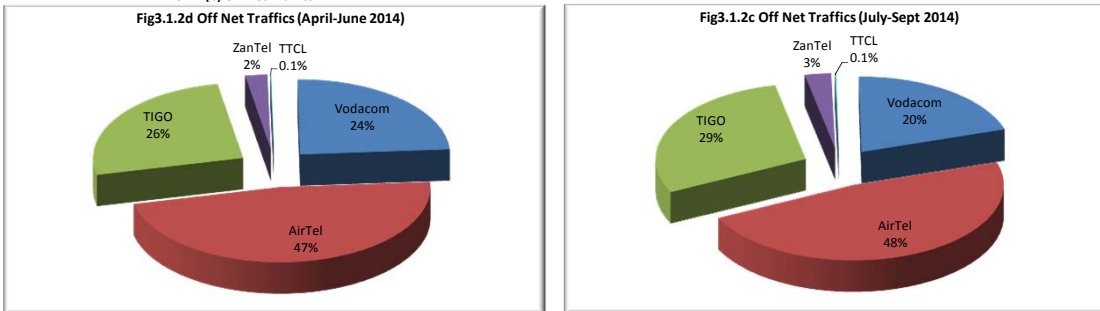
	April-June 2014	July-Sept 2014	Change
On Net Calls	8,190,686,565	9,536,337,832	16%
Off Net Calls	1,715,564,935	1,659,542,862	-3%
Total	9,906,251,500	11,195,880,694	13%

3.1.2 Quarterly National Traffic Operator's Market Share

3.1.2(a) On Net Traffics



3.1.2(b) Off Net Traffics

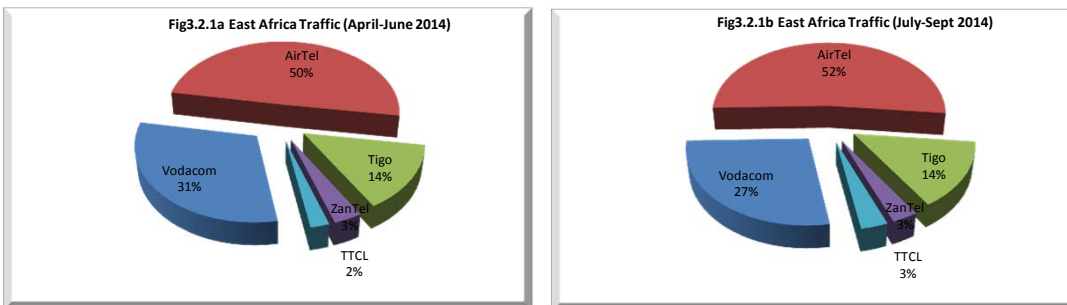


3.2. International Traffic

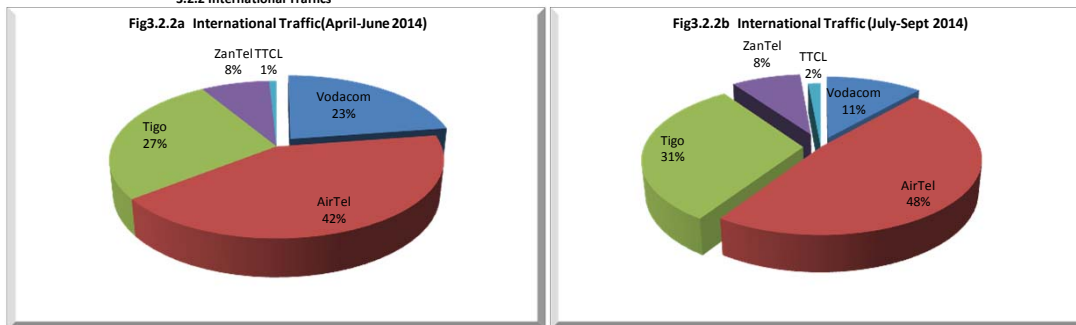
	April-June 2014	July-Sept 2014	Change
To East Africa	12,425,258	13,050,908	5%
From East Africa	9,188,308	11,440,791	25%
To other International:	44,246,813	42,685,740	-4%
From other International:	57,421,443	50,285,694	-12%

3.2.1 Quarterly International Traffic Operator's Market Share

3.2.1 East Africa Traffics



3.2.2 International Traffics

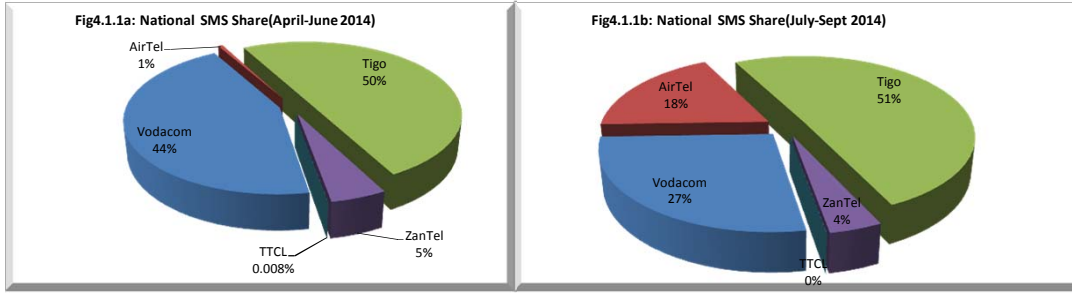


4. Data (SMS)

4.1 National Traffic

	April-June 2014	July-Sept 2014	Change
On Net SMS	5,149,392,539	5,976,645,423	16%
Off Net SMS	2,056,880,773	3,660,295,429	78%

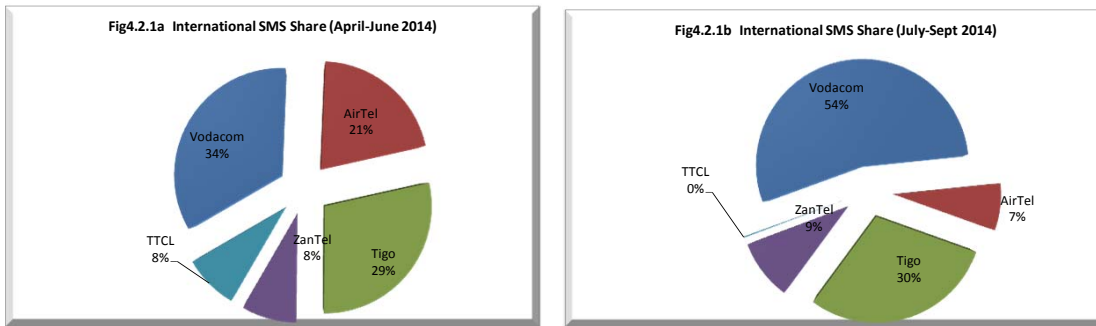
4.1.1 Quarterly national SMS Operator's Market Share



4.2 International Traffic

	April-June 2014	July-Sept 2014	Change
SMS to International	7,686,781	6,718,006	-13%
SMS from International	189,109,070	209,716,552	11%

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
April-June 2014	350	253	Tshs 86,684	Tshs 12,655	Tshs 99,339	Tshs 33,113
July Sept 2014	375	321	Tshs 92,513	Tshs 15,730	Tshs 108,243	Tshs 36,081

6. SIMCARD Registration

6.1 Registered as at December 2013

	Vodacom	AirTel	Tigo	ZaNel	TTCL	Benson	Total
Total Mobile Subscriptions	11,316,301	9,546,135	7,643,219	1,781,590	188,159	528	30,580,609
Registered Subscriptions	11,234,346	8,868,341	7,635,123	1,710,706	188,153	528	29,637,197
% Registered	99%	93%	99.9%	96%	100%	100%	97%

7. Summary of Trend of Telecom Statistics

7.1 Subscriptions and Teledensity

	2005	2006	2007	2008	2009	2010	2011	2012	2013	Sept 2014
Fixed	154,420	151,644	163,269	123,809	172,922	174,511	161,063	176,367	164,999	150,149
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	30,430,460
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	30,580,609
Penetration	10%	15%	21%	32%	43%	50%	59%	61%	61%	68%

Fig7.1 Trend of Mobile and Fixed Subscription

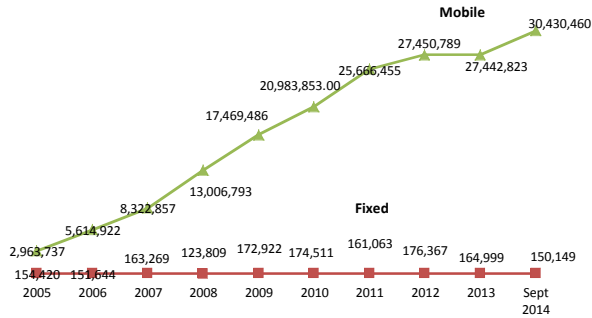
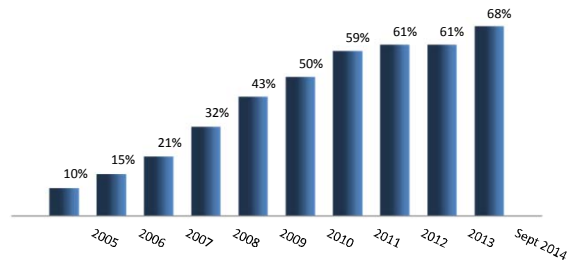


Fig7.2 Teledensity (Penetration)

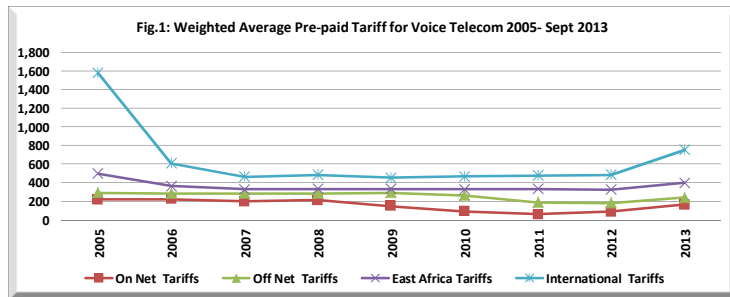


7.2 Traffic (in minutes)

Years	2006	2007	2008	2009	2010	2011	2012	2013
National Traffic (On & Off Net)	506,073,994	2,776,662,168	5,658,864,021	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	2005	2006	2007	2008	2009	2010	2011	2012	2013
On Net Tariffs	219	223	199	212	147	93	62	89	165
Off Net Tariffs	292	284	286	284	292	263	187	182	240
East Africa Tariffs	499	362	331	332	332	330	331	326	399
International Tariffs	1,580	608	465	485	453	468	476	485	752



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