

**PERFORMANCE OF THE NIGERIAN  
TELECOMS SECTOR AS AT  
APRIL, 2013**



# TELEPHONE SUBSCRIBER DATA IN NIGERIA AS AT APRIL 2013

## Summary

S/N	Service Category	Installed Capacity		Connected Lines		Active Subscribers		% Change over Previous Month	Teledensity (Market Segments)	Number of Registered SIM-Based Subscribers	Number of Registration Centers	Number of Internet Service Subscriptions	Active Internet Subscriptions
		Mar 13	Apr 13	Mar 13	Apr 13	Mar 13	Apr 13						
1	Mobile (GSM)	207,653,213	207,683,434	145,233,707	148,161,358	114,172,440	116,325,790	1.89	83.09	119,940,016	29,194	39,893,550	34,928,770
2	Mobile (CDMA)	18,400,000	18,400,000	14,248,537	14,282,485	2,703,604	2,633,936	(2.58)	1.88	4,529,159	2,174	1,145,462	140,060
3	Fixed Wireless	9,020,000	9,020,000	1,360,365	1,361,484	159,753	150,197	(5.98)	0.11				
4	Fixed Wired	2,324,677	2,344,677	1,086,156	1,087,052	245,872	246,742	0.35	0.18			12,187	12,175
5	Total	237,397,890	237,448,111	161,928,765	164,892,379	117,281,669	119,356,665	1.77		124,469,175	31,368	41,051,199	35,081,005
	Teledensity			115.66	117.78	83.77	85.25	1.77					

## Mobile (GSM)

S/N	Operator	Installed Capacity		Connected Lines		Active Subscribers		% Change over Previous Month	Teledensity Per Operator	Number of Registered SIM-Based Subscribers	Number of Registration Centers	Number of Internet Service Subscriptions	Active Internet Subscriptions
		Mar 13	Apr 13	Mar 13	Apr 13	Mar 13	Apr 13						
1	MTN	80,000,000	80,000,000	64,001,081	65,009,073	51,294,654	52,642,943	2.63	37.60	44,935,435	10,332	23,600,224	23,600,224
2	GLO	38,617,905	38,648,126	24,963,698	25,203,824	23,833,796	24,252,533	1.76	17.32	20,725,871	6,000	1,454,392	344,047
3	AIRTEL	57,910,000	57,910,000	29,847,478	31,295,460	23,670,986	24,051,385	1.61	17.18	32,247,503	8,609	9,712,316	5,875,573
4	EMTS	30,000,000	30,000,000	25,663,704	25,895,255	15,114,484	15,120,459	0.04	10.80	22,031,207	4,253	5,126,618	5,108,926
5	MTL	1,125,308	1,125,308	757,146	757,146	258,530	258,530	-	0.18				
	Sub-Total	207,653,213	207,683,434	145,233,707	148,161,358	114,172,440	116,325,790	1.89	83.09	119,940,016	29,194	39,893,550	34,928,770

S/N	Operator	Installed Capacity		Connected Lines		Active Subscribers		% Change over Previous Month (Mobile)	Teledensity Per Operator	Number of Registered SIM-Based Subscribers	Number of Registration Centers	Number of Internet Service Subscriptions	Active Internet Subscriptions
		Mar 13	Apr 13	Mar 13	Apr 13	Mar 13	Apr 13						
1	MULTILINKS	5,100,000	5,100,000	3,614,401	3,614,325	207,872	191,015	(8.11)	0.14	196,979	20	153,436	20,181
2	STARCOMMS	4,000,000	4,000,000	2,074,892	2,074,892	246,501	229,566	(6.71)	0.16	1,257,281	412	660,364	26,457
3	RETEL	2,800,000	2,800,000	1,476,120	1,476,120	111,077	111,077	-	0.08	9,143	99		
4	VISAFONE	6,500,000	6,500,000	7,083,124	7,117,148	2,138,154	2,101,878	(1.70)	1.50	3,065,756	1,703	331,662	93,422
	Sub-Total	18,400,000	18,400,000	14,248,537	14,282,485	2,703,604	2,633,936	(2.58)	1.88	4,529,159	2,174	1,145,462	140,060

S/N	Operator	Installed Capacity		Connected Lines		Active Subscribers		% Change over Previous Month (Fixed)	Teledensity Per Operator
		Mar 13	Apr 13	Mar 13	Apr 13	Mar 13	Apr 13		
1	MULTILINKS	5,100,000	5,100,000	257,570	257,625	37,667	34,868	(7.44)	0.02
2	STARCOMMS	2,720,000	2,720,000	793,794	793,794	81,015	73,691	(9.04)	0.05
3	RETEL	1,000,000	1,000,000	163,987	163,987	10,849	10,849	-	0.01
4	VISAFONE	200,000	200,000	145,014	146,078	30,222	30,792	1.89	0.02
	Sub-Total	9,020,000	9,020,000	1,360,365	1,361,484	159,753	150,197	(5.98)	0.11

S/N	Operator	Installed Capacity		Connected Lines		Active Subscribers		% Change over Previous Month (Fixed)	Teledensity Per Operator	Number of Internet Service Subscriptions	Active Internet Subscriptions
		Mar 13	Apr 13	Mar 13	Apr 13	Mar 13	Apr 13				
1	INITEL	684,677	684,677	540,994	540,994	58,750	58,750	-	0.04		
2	INTERCELLULAR	200,000	200,000	193,726	193,726	1,053	1,053	-	0.00		
3	VGC/MTN	850,000	850,000	59,048	59,048	16,361	16,423	0.38	0.01	6,695	6,695
4	EMTS	120,000	120,000	70,155	70,155	19,744	19,744	-	0.01		
5	DISC COM	32,000	32,000	2,010	2,010	176	176	-	0.00		
6	21st CTN	152,000	172,000	99,132	100,028	88,554	89,362	0.91	0.06	5,492	5,480
7	MONARCH	10,000	10,000	1,263	1,263	513	513	-	0.00		
8	WI-TEL	5,000	5,000	900	900	80	80	-	0.00		
9	RAINBOWNET	94,000	94,000	59,545	59,545	14,169	14,169	-	0.01		
10	ODUATEL	175,000	175,000	43,896	43,896	35,421	35,421	-	0.03		
11	XS BROADBAND	-	-	-	-	329	329	-	0.00		
12	WEBCOM	2,000	2,000	487	487	120	120	-	0.00		
13	PRESTEL	-	-	15,000	15,000	-	-	-	-		
14	PPC	-	-	-	-	-	-	-	-		
15	MEGATECH	-	-	-	-	-	-	-	-		
16	HORIZON	-	-	-	-	-	-	-	-		
17	WIDEWAYS	-	-	-	-	-	-	-	-		
18	IPNX	-	-	-	-	10,602	10,602	-	0.01		
19	SWIFT	-	-	-	-	-	-	-	-		
20	HYPERIA	-	-	-	-	-	-	-	-		
	Sub-Total	2,324,677	2,344,677	1,086,156	1,087,052	245,872	246,742	0.35	0.18	12,187	12,175

Notes: 1. The figures in red are updates from previous month.

## TOTAL & ACTIVE INTERNET SUBSCRIPTIONS AS AT APRIL '13

S/N	Operator	Total Number of Internet Service Subscriptions		Total Active Internet Subscriptions		% Change of Active Subscriptions Over Previous Month
		Mar 13	Apr-13	Mar-13	Apr-13	
1	MTN	22,725,089	23,600,224	22,725,089	23,600,224	3.85
2	GLO	2,028,506	1,454,392	659,671	344,047	(47.85)
3	AIRTEL	13,046,304	9,712,316	6,154,572	5,875,573	(4.53)
4	EMTS	4,932,188	5,126,618	4,932,188	5,108,926	3.58
5	MULTILINKS	153,521	153,436	23,572	20,181	(14.39)
6	VISAFONE	322,982	331,662	92,400	93,422	1.11
7	STARCOMMS	660,364	660,364	36,898	26,457	(28.30)
8	VGC/MTN	8,223	6,695	7,285	6,695	(8.10)
9	21ST CENTURY	5,491	5,492	5,483	5,480	(0.05)
	<b>TOTAL</b>	<b>43,882,668</b>	<b>41,051,199</b>	<b>34,637,158</b>	<b>35,081,005</b>	<b>1.28</b>

## SUMMARY OF INDUSTRY STATISTICS AS AT APRIL, 2013

In April, 2013 the total number of active voice subscriptions in Nigeria increased to 119,356,665 from 117,281,669 in March, 2013 while Teledensity also increased from 83.77 to 85.25 in April, 2013 thereby indicating an increase of 1.76%.

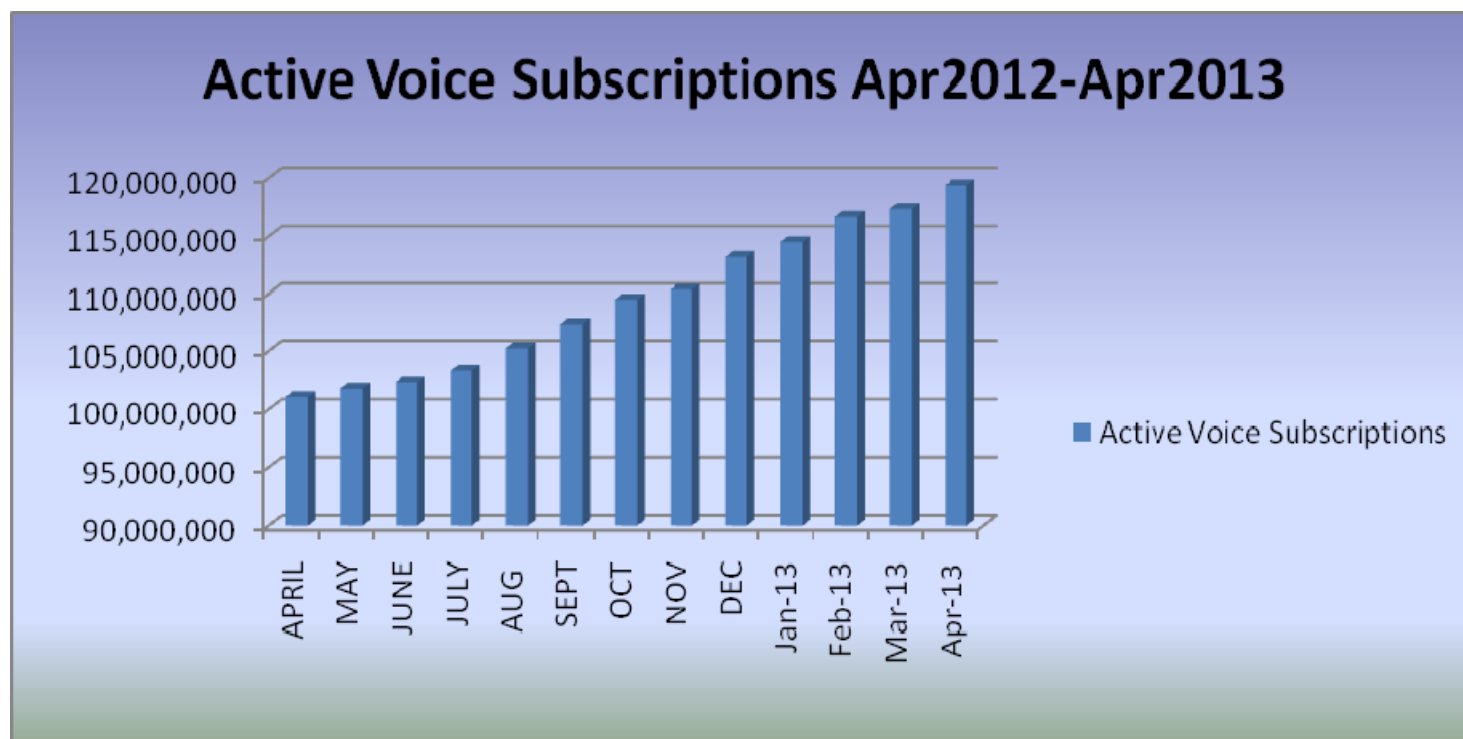
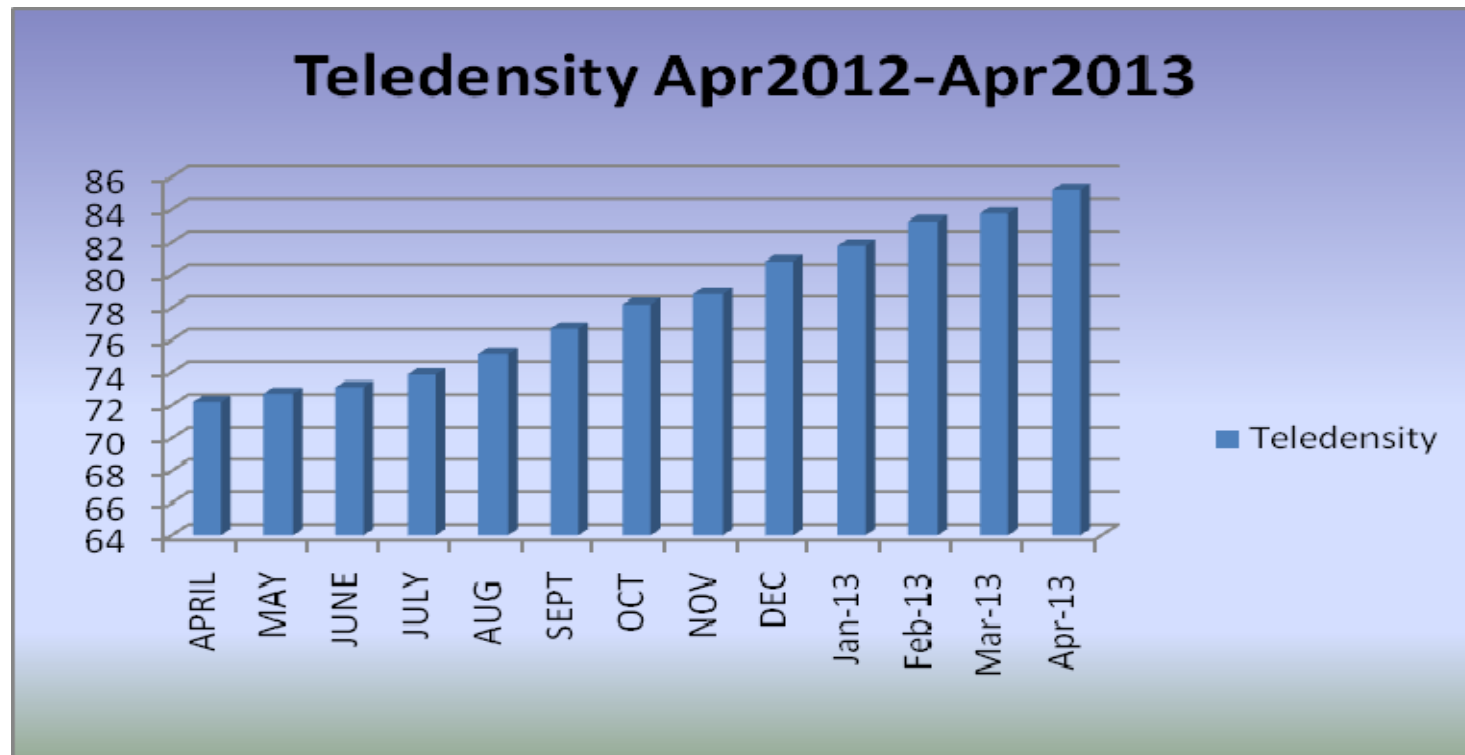
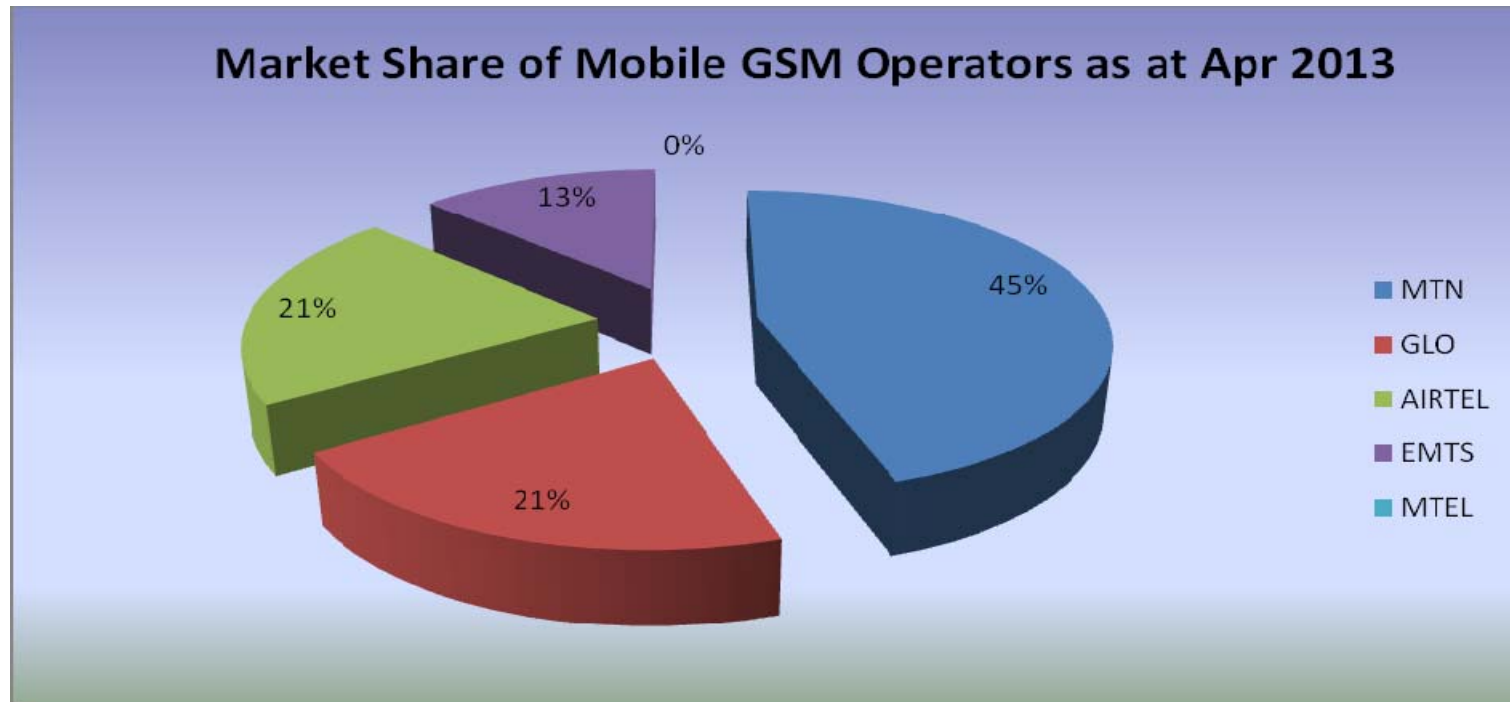


Figure 1: Total Active Voice Subscriptions as at April, 2013



**Figure 2: Trend of Teledensity (April, 2012 – April, 2013)**

The graphs above further illustrate that the number of active voice subscriptions and teledensity have consistently increased month on month. Teledensity increased from 72.20 in April, 2012 to 85.25 in April, 2013.



**Figure 3: Market Share of Mobile (GSM) Operators as at April, 2013**

MTN	GLO	AIRTEL	EMTS	MTEL
52,642,943	24,252,533	24,051,385	15,120,409	258,520
45%	21%	21%	13%	0%

As at April, 2013, the total number of active voice subscriptions for this market segment was 116,325,790 indicating an increase of 1.89% from the 114,172,440 active voice subscriptions recorded in March, 2013. A breakdown of the total number of active voice subscriptions reveals that the four major Mobile GSM Operators [MTN; GLO; AIRTEL & EMTS] each had 52,642,943; 24,252,533; 24,051,385; & 15,120,409 active voice subscriptions thereby indicating that MTN; GLO; AIRTEL & EMTS each have 45%; 21%; 21%; & 13% share of the Mobile GSM market segment.

The analysis of data for active voice subscriptions for this market segment therefore shows that MTN; GLO, AIRTEL & EMTS each recorded an increase of 2.63%; 1.76%; 1.61% & 0.04% respectively in the month of April 2013.

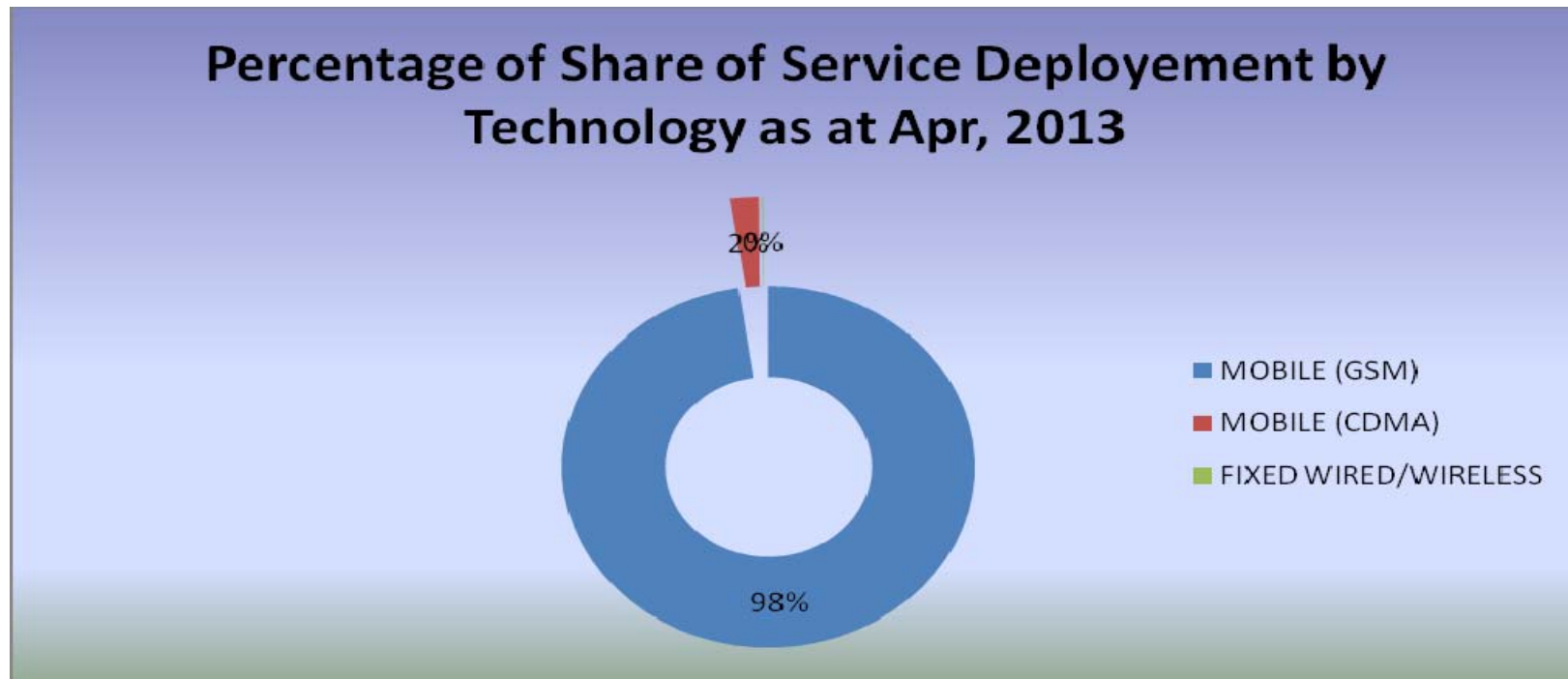


Figure 4: Percentage of Market Share of Service Deployment by Technology as at April, 2013

<i>MOBILE (GSM)</i>	<i>MOBILE (CDMA)</i>	<i>FIXED WIRED/WIRELESS</i>
97.46%	2.20%	0.12%

As at April 2013, the Mobile (GSM) market segment maintained its lead as it accounted for 97.46% of the market. The Mobile (CDMA) and the Fixed Wired/ Wireless Market segments each accounted for 2.20% and 0.12% respectively also indicating a continued decline in the market share of these segments. Our analysis reveals that the Mobile (CDMA) and the Fixed Wired/ Wireless Market segments continue to lose market share to the Mobile (GSM) market segment.



**Figure 5: Total Active Internet Subscriptions as at April, 2013**

MONTH (2012)	JULY 2012	AUG 2012	SEPT 2012	OCT 2012	NOV 2012	DEC 2012	JAN 2013	FEB 2013	MAR 2013	APR 2013
Active Internet Subscriptions	26,585,892	28,776,578	28,201,047	26,558,390	27,900,482	31,143,861	32,223,569	32,527,348	34,637,158	35,081,005

The month of April, 2013 witnessed an increase in the number of active internet subscriptions. Active internet subscriptions increased from 34,637,158 in March, 2013 to 35,081,005 in April, 2013 indicating an increase of 1.28%. The trend further shows that there has been a steady growth in total active internet subscriptions from November, 2012 till date.



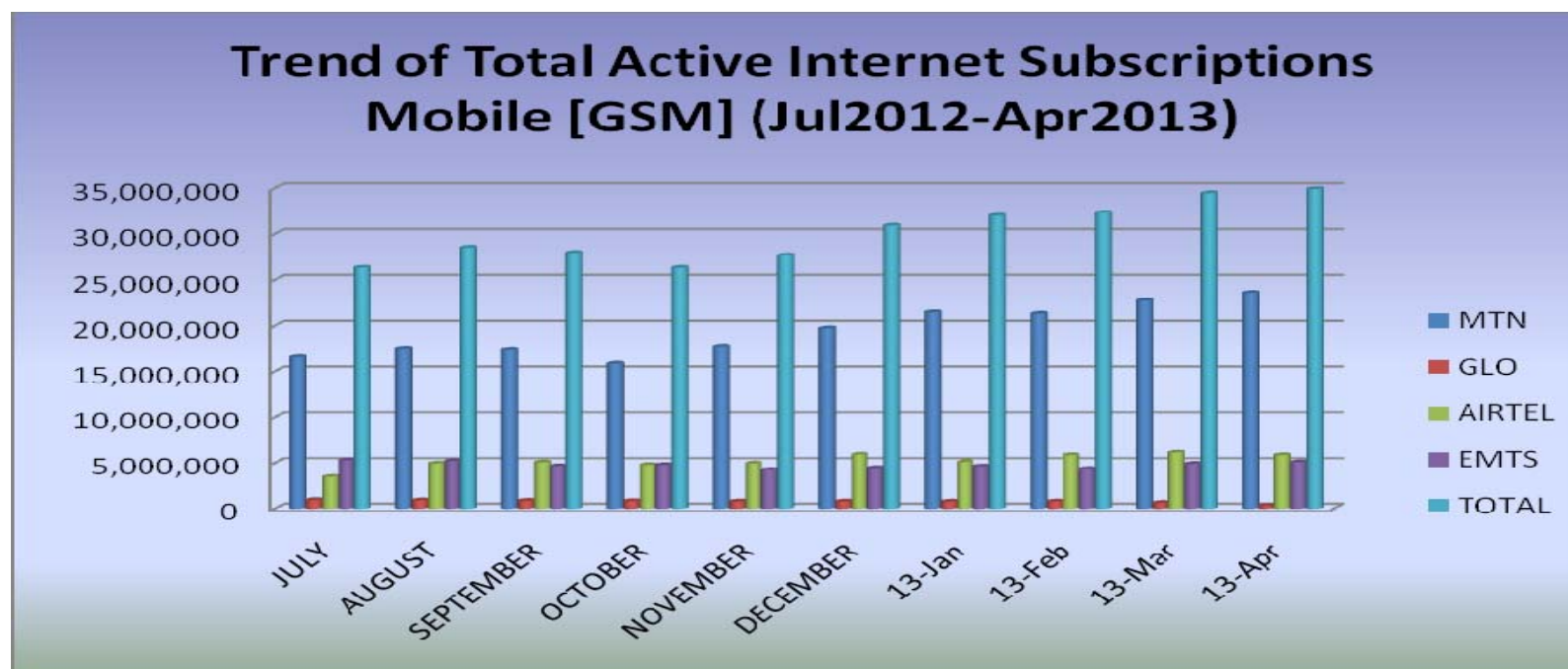


Figure 6: Trend of Total Active Internet Subscriptions- Mobile GSM (July, 2012 - April, 2013)

OPERATORS	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JAN-13	FEB-13	MAR-13	APR-13
MTN	16,571,980	17,413,387	17,311,225	15,878,288	17,644,756	19,732,901	21,458,211	21,308,725	22,725,089	23,600,224
GLO	967,586	924,587	885,649	843,813	802,872	802,731	787,925	801,218	659,671	344,047
AIRTEL	3,478,294	4,969,529	5,093,767	4,807,124	4,984,585	5,948,190	5,135,208	5,870,690	6,154,572	5,875,573
EMTS	5,320,312	5,227,187	4,677,082	4,800,683	4,253,891	4,455,290	4,635,888	4,354,845	4,932,188	5,108,926
<b>TOTAL</b>	<b>26,338,172</b>	<b>28,534,690</b>	<b>27,967,723</b>	<b>26,329,908</b>	<b>27,686,104</b>	<b>30,939,112</b>	<b>32,017,232</b>	<b>32,335,478</b>	<b>34,471,520</b>	<b>34,928,770</b>

The graph and table above shows the trend of total active Internet subscriptions for four (4) Mobile GSM Operators [MTN; GLO; AIRTEL; & EMTS] from July, 2012 to April, 2013. While MTN & EMTS recorded an increase of 3.85% & 3.58% respectively in their number of active internet subscriptions, GLO & AIRTEL witnessed a decrease 47.84% & 4.53 respectively in the number of active internet subscriptions.

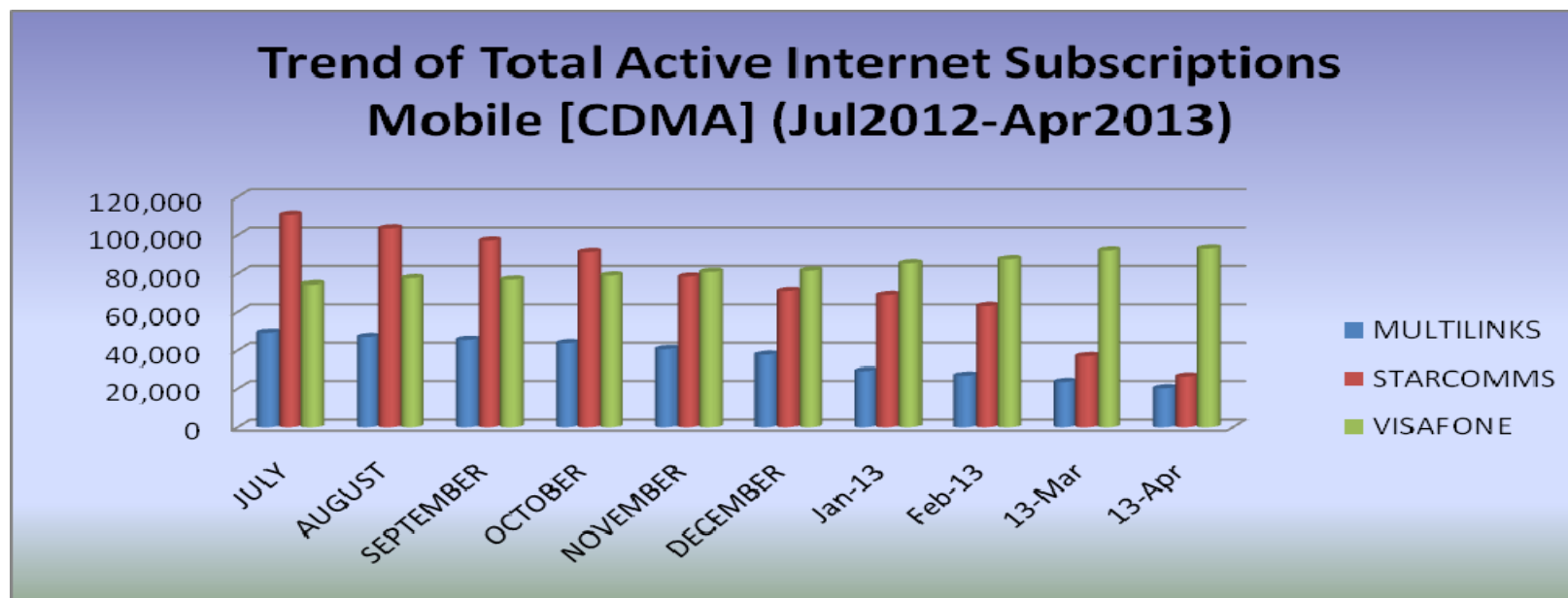


Figure 7: Trend of Total Active Internet Subscriptions- Mobile CDMA (July, 2012 - April, 2013)

OPERATORS	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JAN 2013	FEB 2013	MAR-13	APR-13
MULTILINKS	49,425	47,117	45,565	43,833	40,677	37,751	29,306	26,894	23,572	20,181
STARCOMMS	110,802	103,547	97,090	91,539	78,392	71,156	69,042	63,198	36,898	26,457
VISAFONE	74,470	77,573	76,760	78,975	80,900	81,563	85,470	87,691	92,400	93,422

The Mobile (CDMA) market segment accounts for just a small fraction of active internet subscriptions. As at April, 2013 this market segment only accounted for 0.39% of the total active internet subscriptions. The active internet subscriptions for Multilinks and Starcomms continued to decrease In April, 2013, while Visafone on the other hand experienced a 1.10% increase in active subscriptions.