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### *Telecommunications Market Data & Statistics Report: End of 2014*

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The ICT infrastructure roll-out and uptake during the past decade has led to an increasing demand for accurate and comparable data and statistics on ICT. Significant changes have happened in the area of ICT over the last few years. Predominantly, Internet is now accessed through a multitude of devices, including tablets and similar handheld computers. The impressive spread of mobile cellular networks has brought Internet to people who live in areas where fixed telecommunication infrastructure is limited. ICT data and statistics have been on the agenda of the local and international statistical community for many years and are receiving increasing attention due to the impact these technologies have on the economy and society in general.

This report provides a brief update on the trends for the selected telecommunications services in Seychelles as of the end of December 2014. It includes the sector performance of fixed lines, mobile cellular and the internet services.

The data has been compiled based on information received from the four licensed telecommunications operators namely: Cable and Wireless (Seychelles) Ltd (CWS), Airtel (Seychelles) Ltd (Airtel), Kokonet and Intelvision. The Department of Information Communications Technology (DICT) collects data from the operators on a quarterly basis and compile and disseminate the data as information for the general public.

The DICT has endeavoured its best to ensure accuracy of the data and statistics provided in this report. However, DICT shall not be liable for any loss, damage, cost or expense whether direct, indirect, consequential or special, incurred by, or arising by reasons of, any person using or relying on this information and whether caused by reason of any inaccuracy, error, omission or misinterpretation or otherwise.

An overview of the performance of the ICT sector for the past three (3) years in terms of the three primary telecommunication services is depicted in the Table 1 below. As it has been the case for the last few years, the decline in the number of fixed line subscriptions continues whilst in contrast growth of mobile cellular subscriptions is maintained. Similarly, the number of Internet subscriptions continues to increase and this is mainly due to the increase in popularity of

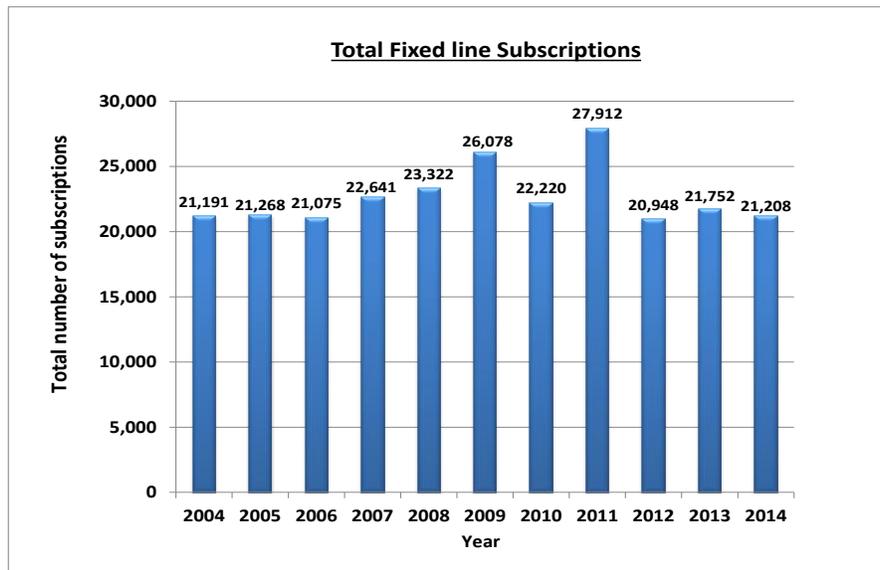
Service subscriptions	31 <sup>st</sup> December 2012	31 <sup>st</sup> December 2013	31 <sup>st</sup> December 2014	Penetration per 100 inhabitants at 31 <sup>st</sup> December 2014 (%)
Fixed Lines Service	20,948	21,752	21,208	23.31
Mobile Cellular Service	126,594	136,790	151,336	166.40
Internet Service	18,770	22,226	24,245	26.66

Table 1.

## Market Players

In the fixed line market, there are four (4) operators namely; Cable and Wireless (Seychelles) Ltd (CWS), Airtel (Seychelles) Ltd (Airtel), Kokonet and Intelvison. In the mobile cellular market there are two (2) operators namely; Cable and Wireless (Seychelles) Ltd (CWS) and Airtel (Seychelles) Ltd (Airtel). With respect to the Internet market, there are four (4) operators namely; Cable and Wireless (Seychelles) Ltd (CWS), Airtel (Seychelles) Ltd (Airtel), Kokonet and Intelvison.

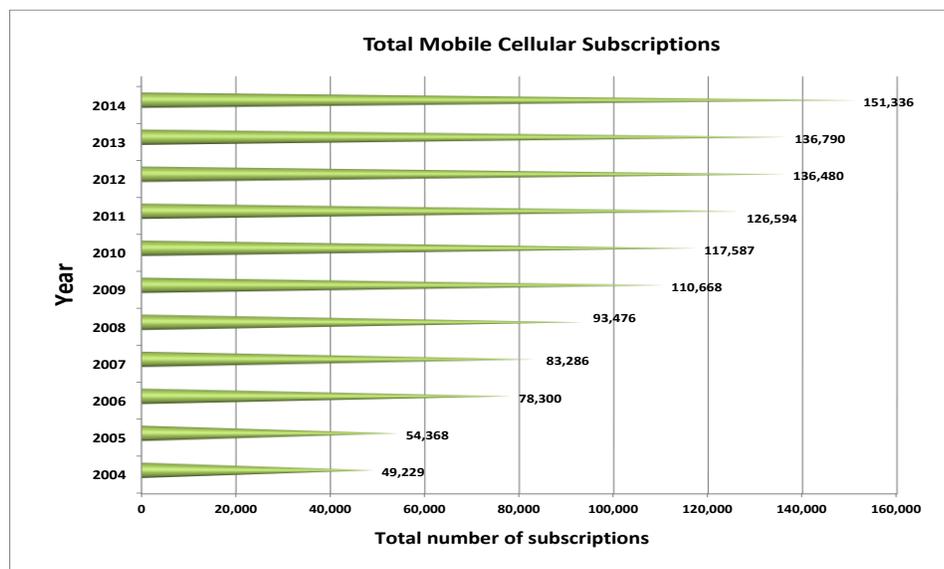
## Fixed line Service



At the end of December 2014 there were 21,208 fixed line telephone subscriptions, which is a 2.50% reduction compared to December 2013.



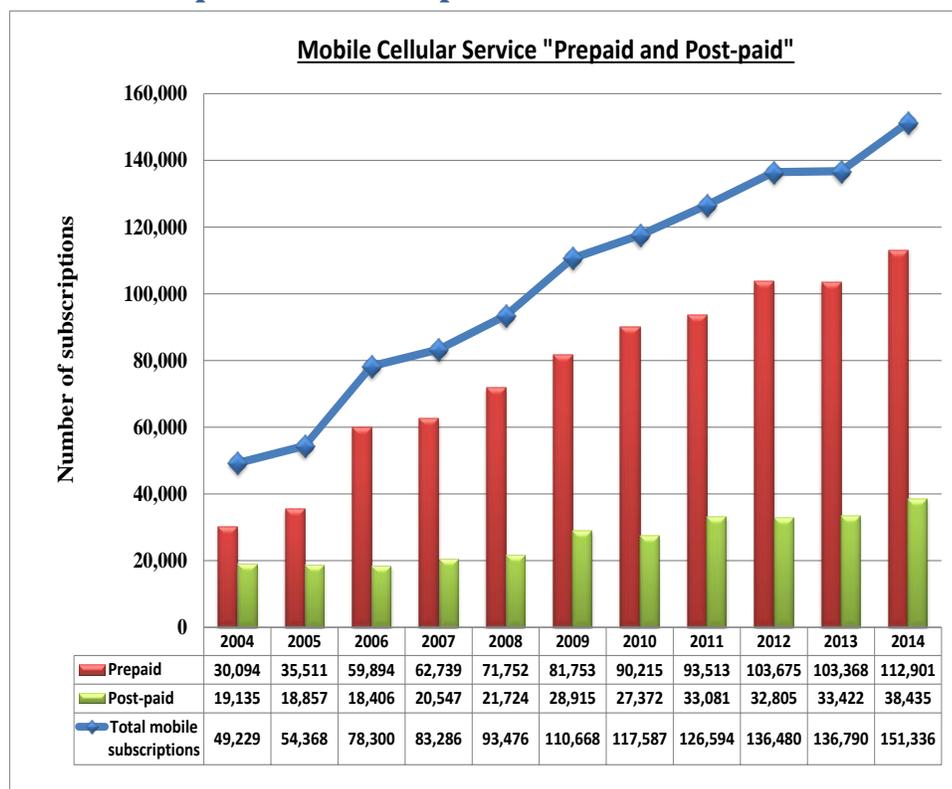
## Mobile Cellular Service



The number of mobile subscriptions has risen by 10.63% to 151,336 subscriptions by the end of 2014 compared 136,790 subscriptions recorded at the end of December 2013.



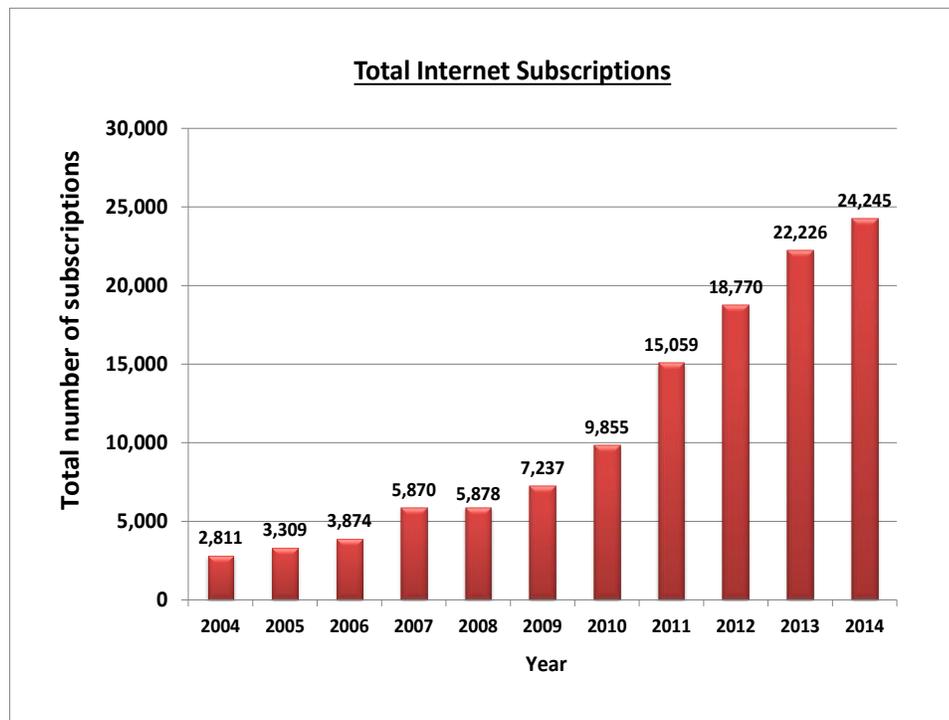
## Mobile Prepaid and Post-paid Service



Mobile subscriptions comprised of 112,901 prepaid subscriptions thus accounted for 74.60% of the mobile subscriptions market, and 38,435 post-paid mobile subscriptions, accounted for 25.40% of the subscriptions market at the end of December 2014.

Compared to December 2013, the number of prepaid subscriptions increased by 9.22% whilst post-paid subscriptions increased by 15.00%.

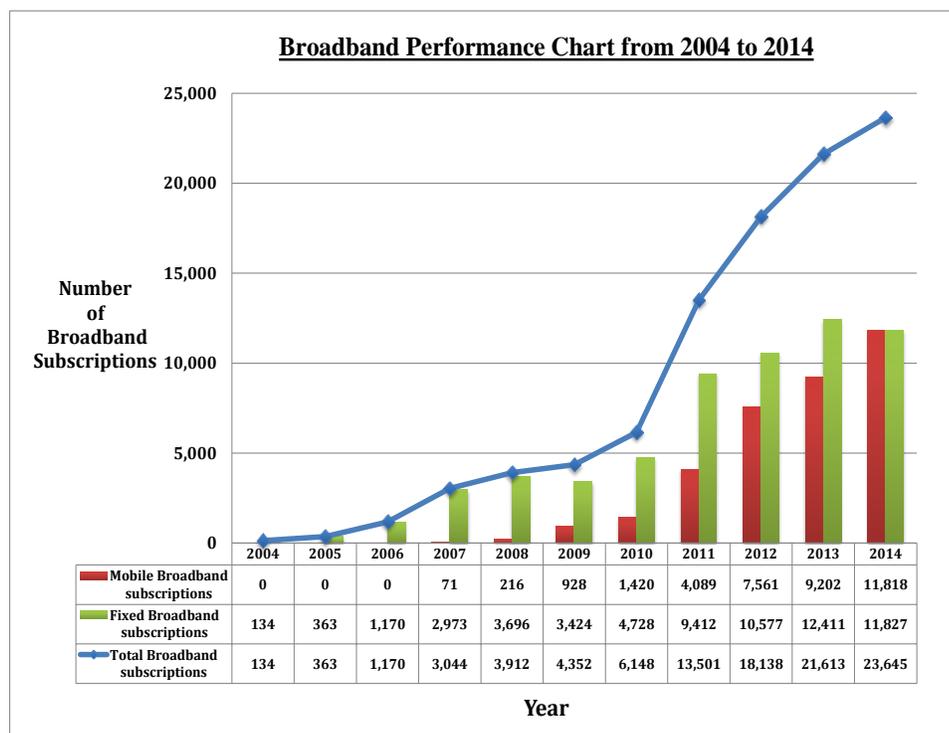
## Internet Service



Internet subscriptions increased by 9.08%. There were 24,245 Internet subscriptions at the end of December 2014 compared with 22,226 subscriptions at the end of December 2013.



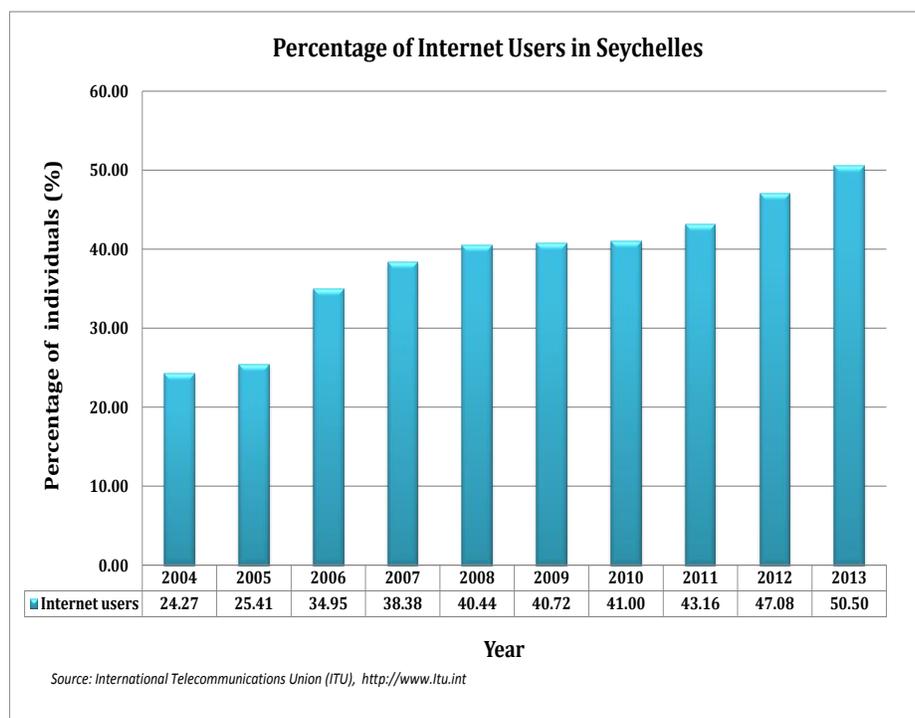
## Broadband



There were 23,645 broadband Internet access subscriptions at the end of 2014, of which 11,818 were mobile broadband subscriptions and 11,827 were fixed broadband subscriptions.



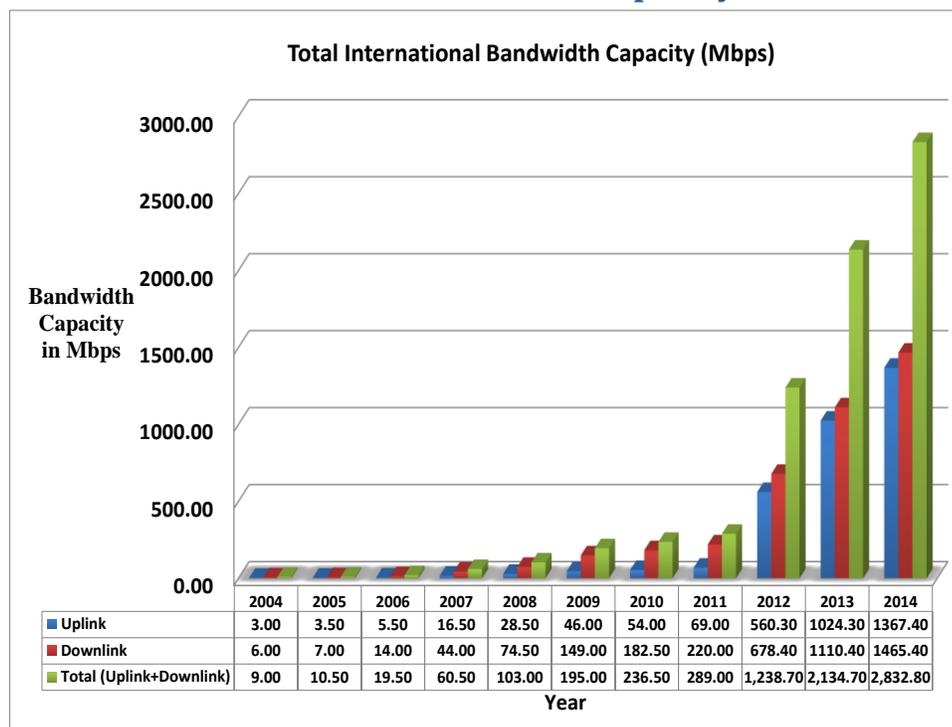
## Internet Services



The number of individuals using the internet has gradually increased over the years.

According to the data published by the International Telecommunications Union (ITU), it was estimated that at the end of December 2014, there was 54.26% of individuals using the Internet in Seychelles. This is an increase of 3.76% compared with 50.50% reported at the end of December 2013.

## International Internet Bandwidth Capacity

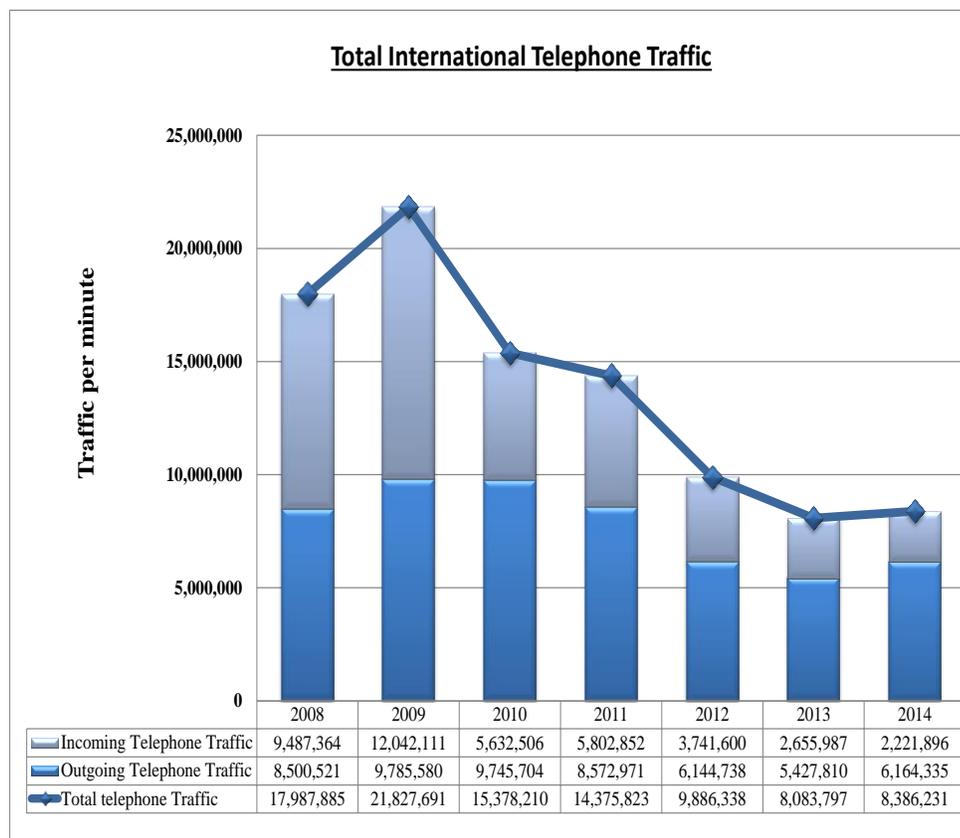


There has been a substantial increase in the total available international internet bandwidth from 2,134.70Mbps in 2013 to 2,832.80Mbps in 2014.

The effective bandwidth per user have increased from 24kbps to 32kbps.



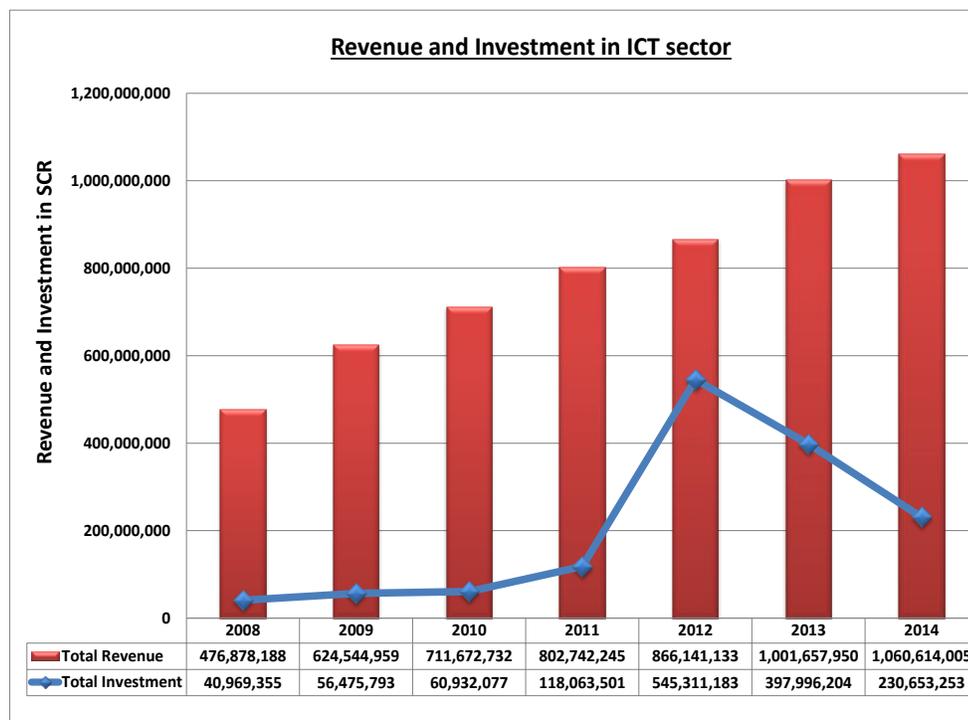
## International Voice Traffic



Since 2009, there has been a gradual decrease in the total incoming and outgoing international telephone traffic. There was an increase by 3.74% from 8,083,797 minutes at the end of December 2013 to 8,386,231 minutes at the end of December 2014.

However, the total incoming international telephone traffic has dropped by 16.34% to 2,221,896 minutes whilst the outgoing international telephone traffic has increased by 13.56% to 6,164,335 minutes at the end of December 2014.

## Revenue and Investment of the ICT sector



The total revenue of the ICT sector, continues to rise steadily with a total revenue of SR1,060,614,005, reported at the end of December 2014.

However, the combined amount of investment made by the operators has declined compared with 2012 and 2013. A total of SR230,653,253 were invested at the end of 2014, based on data in annual financial statement.