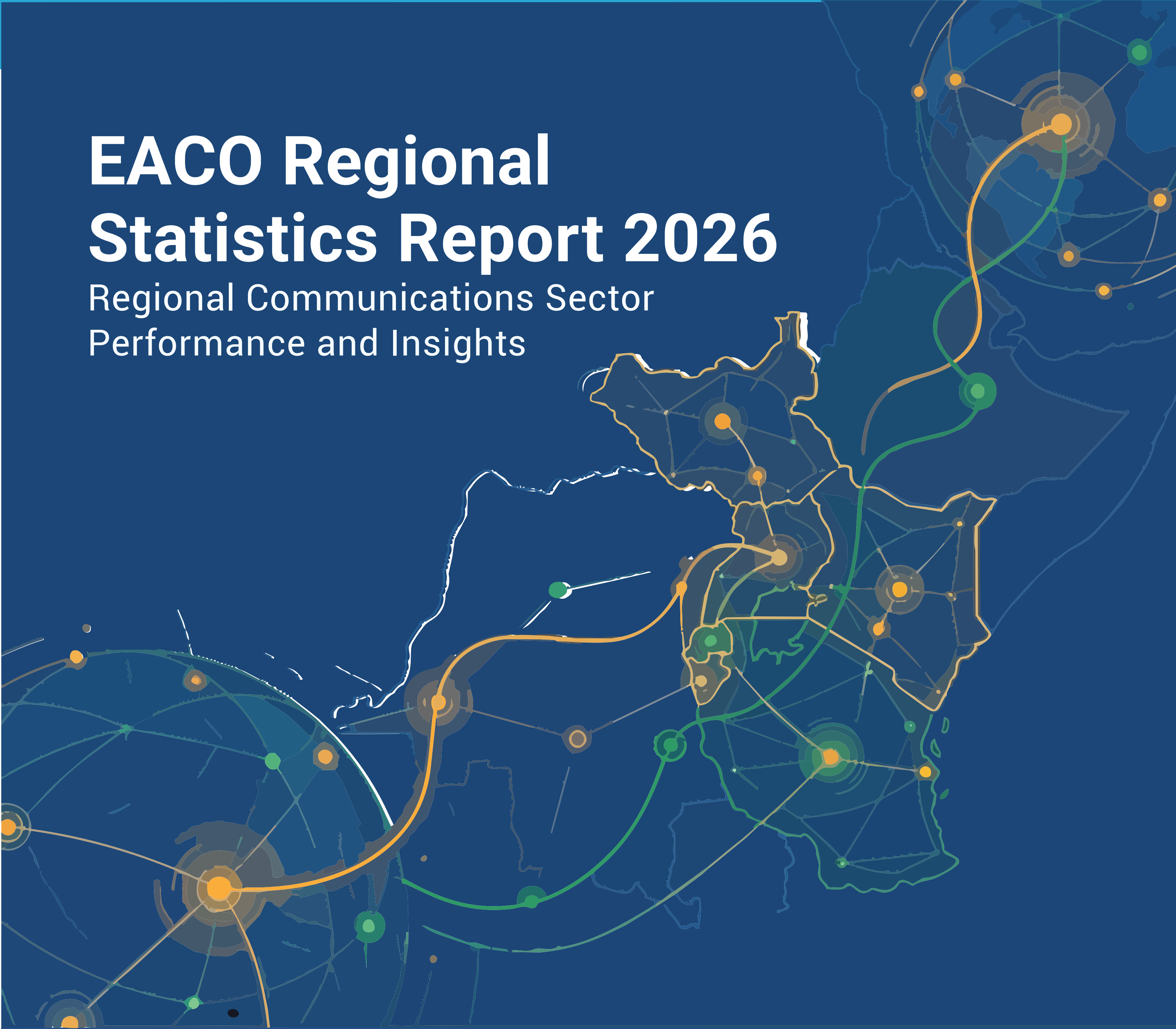


EACO Regional Statistics Report 2026

Regional Communications Sector Performance and Insights

Published by the EACO Secretariat

Kigali, Rwanda
2026

Data Period: 2024 – 2025 | Year-on-Year Comparative Analysis

Burundi · Democratic Republic of Congo · Kenya · Rwanda · South Sudan · Tanzania · Uganda

Word from the Executive Director

Dear Colleagues, Partners, and Stakeholders of the East African Communications Sector,

It is my distinct honour and privilege to present the East African Communications Organization (EACO) Regional Communications Sector Statistics Report for 2026. This edition covers the period 2024 to 2025 and delivers a precise year-on-year comparative analysis anchored entirely in data submitted directly by our seven member state regulators: ARCT (Burundi), ARPTC (Democratic Republic of Congo), CA (Kenya), RURA (Rwanda), NCA (South Sudan), TCRA (Tanzania), and UCC (Uganda).

The numbers contained in this report tell a compelling story of accelerating digital growth across East Africa. In 2025, the EACO region recorded a combined 334.69M active mobile subscriptions.

Mobile data (internet) subscriptions have grown across every member state, with South Sudan recording the most expansion at +103.7% year-on-year to 3.60M, signalling the beginning of a digital awakening in our most developing market. Kenya and Tanzania continue to anchor the region's data economy, with 61.99M and 57.69M mobile internet subscriptions respectively by 2025.

Mobile money remains East Africa's most transformative digital financial innovation. Kenya's mobile money ecosystem grew to 51.36M subscriptions (+21.4%), Tanzania reached 76.47M (+21.0%), and Uganda grew to 35.61M (+10.8%) active accounts. Rwanda's mobile money transaction value rose by 48.5% in local currency terms. These figures confirm East Africa's enduring global leadership in mobile financial inclusion.

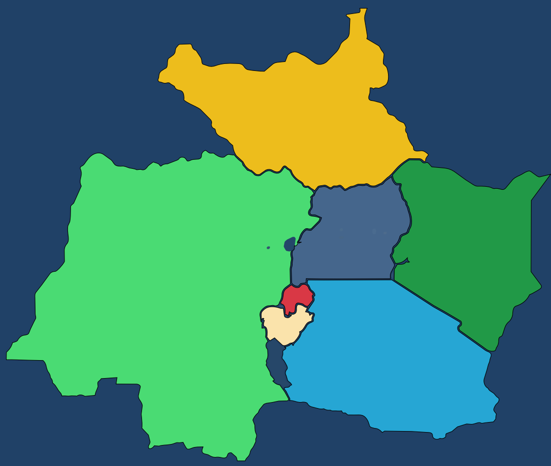
Domestic Voice traffic data reveals important market dynamics, with all East African markets recording double-digit growth. On-net traffic grew in Burundi (+60.0%), South Sudan (+74.4%), and Kenya (+31.0%), while off-net traffic grew in Kenya (+58.4%) and Uganda (+52.3%), reflecting intensified inter-operator competition and expanding network footprints. The DRC's data traffic volume recorded a 51.3% growth, reaching over 1.6 billion gigabytes.

I extend my deepest gratitude to the heads and technical staff of all our member regulators for their commitment to data quality and timely submission. I also thank EACO's Working Group 1, the ITU, and the GSMA for their complementary global benchmarks that help contextualise our regional performance. The East African digital economy is on a trajectory of transformative growth, and this report is the evidence.

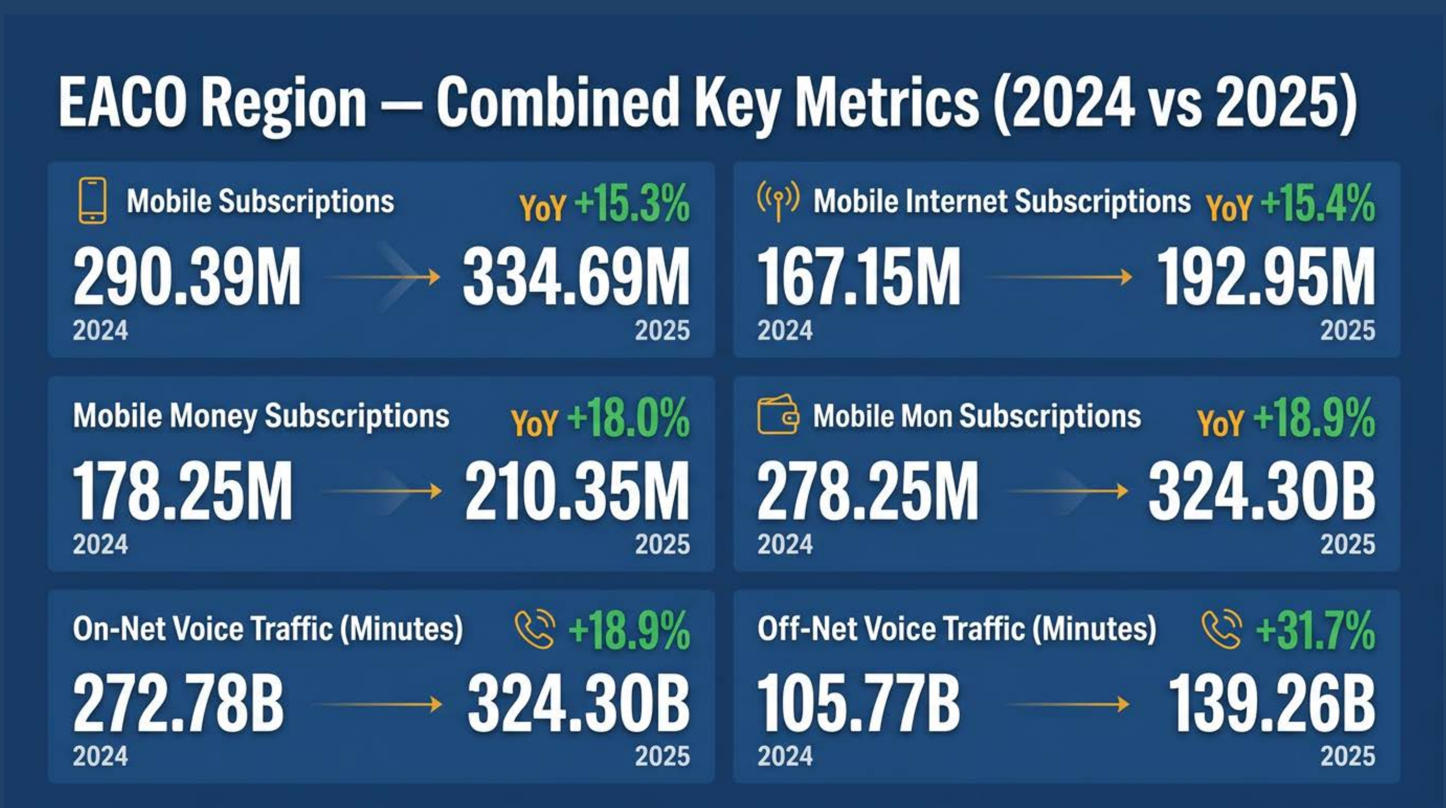
Yours sincerely,

Caroline Koech
Executive Director
East African Communications Organization (EACO)

Executive Summary



This report presents a year-on-year statistical analysis of the telecommunications sector across EACO's seven member states — Burundi, DRC, Kenya, Rwanda, South Sudan, Tanzania, and Uganda — for the period 2024 to 2025. All data are sourced from member state regulators and benchmarked against ITU and GSMA global and Africa indices.



KEY REGIONAL

HIGHLIGHTS

1

Tanzania recorded the fastest mobile subscription growth in the region at

+23.1%

adding **20.05M** new subscribers to reach **106.82M** and a penetration rate of **156.7%**.

2

Kenya leads in mobile internet density with

61.99M

data subscriptions at

118.3%

penetration (**+10.0%** Year-on-year - YoY)

3

South Sudan showed remarkable internet growth: mobile internet subscriptions

+103.7%

more than doubled (**+103.7%**) from **1.77M** to **3.60M**, while penetration rose from **12.5%** to **24.5%**.

4

Kenya's mobile money subscriptions grew

+21.4%

to **51.36M**, while Tanzania grew **+21.0%** to **76.47M**, collectively driving East Africa's continued global leadership in Mobile Financial Services (**MFS**).

5

RWF

Rwanda's mobile money transaction value grew

+48.5%

in local currency (**RWF 13.7 trillion** in 2025 vs **RWF 9.2 trillion** in 2024), the strongest value growth across all reporting countries.

6

Burundi's on-net voice traffic grew

+60.0%

to **2.39B** minutes, and its ONA inbound traffic grew **+150.1%**, signalling rapid connectivity expansion and onboarding amongst ONA Member States.

7

South Sudan's off-net voice traffic grew

+159.5%

to **798.04M** minutes, reflecting significant market opening and increased inter-operator calling.

8

DRC's mobile data traffic grew

+51.3%

to **1.6 B GBs** YoY in comparison to 2024, posting the strongest growth in this segment across all countries.

9

Uganda recorded positive Year-on-Year growth

ACROSS ALL SEGMENTS

except for One Network Area Outgoing Voice Traffic.

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Introduction

The East African Communications Organization (EACO) was established in 2012 as a regional autonomous body with international legal personality, headquartered in Kigali, Rwanda. EACO's mandate is to coordinate the development of the communications sector through harmonisation of policy and regulatory frameworks, and to strengthen cooperation among its seven member states, Burundi, the Democratic Republic of Congo, Kenya, Rwanda, South Sudan, Tanzania, and Uganda in the provision of telecommunications, broadcasting, and postal services.

As an ITU Sector Member, EACO operates within the global ICT regulatory framework while championing East African priorities. This annual statistical report is the organisation's primary mechanism for evidence-based policy advocacy, enabling regulators, operators, investors, and development partners to understand sectoral trends, identify gaps, and benchmark performance.

Scope and Methodology

This 2026 edition covers data for the years 2024 and 2025 as submitted by member state national regulators. Metrics are defined in accordance with ITU guidelines: active mobile subscriptions are SIM cards generating operator revenue within 90 days; mobile broadband subscriptions cover 3G, 4G, and 5G data services; mobile money subscriptions are accounts registered with mobile financial service providers.

Voice traffic data (on-net, off-net, ONA inbound, and ONA outbound) are expressed in minutes. Mobile data traffic is expressed in gigabytes. Mobile money transaction values are in local currencies. Year-on-year (YoY) changes are calculated from the directly reported 2024 and 2025 figures.

Section 1: Mobile Subscriptions

Mobile subscriptions — active SIM cards generating revenue within a 90-day window are the primary indicator of telecommunications market reach. This section presents subscriber volumes, penetration rates, and year-on-year performance across all seven EACO member states for 2024 and 2025, benchmarked against Africa and global averages from ITU Facts and Figures of 2025.

KEY REGIONAL HIGHLIGHTS

1.1 ACTIVE MOBILE SUBSCRIPTION VOLUMES

EACO TOTAL

334.69M

+15.3%
YoY CHANGE

ACTIVE MOBILE SUBSCRIPTIONS: 2024 vs 2025

Country	2024	2025	YoY Change
Burundi	8.4M	8.22M	-3.1%
Kenya	71.38M	78.39M	+9.8%
Rwanda	13.29M	13.69M	+3.0%
South Sudan	5.19M	6.31M	+21.7%
Tanzania	86.77M	106.82M	+23.1%
Uganda	41.60M	47.08M	+13.2%
DRC	63.96M	73.93M	+15.6%
EACO Total	**290.39M**	**334.69M**	**+15.3%**

Note: Source: ARCT (Burundi), ARPTC (DRC), CA Kenya, RURA Rwanda, NCA South Sudan, TCRA Tanzania, UCC Uganda.

1.2 MOBILE PENETRATION RATES

MOBILE PENETRATION RATE (PER 100 INHABITANTS)

MOBILE PENETRATION RATE (PER 100 INHABITANTS): 2024 vs 2025

Country	2024 Penetration	2025 Penetration	YoY Change
Burundi	64.7%	66.62%	+3%
Kenya	138.5%	149.5%	+7.9%
Rwanda	95.9%	97.0%	+1.2%
South Sudan	36.8%	42.9%	+16.7%
Tanzania	133.3%	156.7%	+17.5%
Uganda	90.6%	99.7%	+10.0%
DRC	60.5%	67.8%	+12.2%

Data for 2024 and 2025

Market Context

Burundi

Burundi's mobile sector, regulated by ARCT, recorded 8.22 million active mobile subscriptions in 2025, down from 8.47 million in 2024, representing a 3.0% decline. The reduction was primarily driven by the implementation of a regulatory measure limiting subscribers to a maximum of two SIM cards across all mobile networks, which led to the deactivation of excess SIM cards and a contraction in the subscriber base.

Despite this decline, the market continues to be served by three mobile network operators—Viettel Burundi, Econet Leo, and Onatel. Mobile penetration declined slightly in line with the reduction in subscriptions. While Burundi continues to face structural challenges, including low disposable incomes, limited telecommunications infrastructure outside Bujumbura, and a predominantly rural population, there remains considerable potential for future growth as infrastructure investments advance through initiatives such as the Burundi Digital Foundations Project.

Kenya

Kenya's mobile market continued its trajectory under the Communications Authority of Kenya (CA). Active subscriptions grew from 71.38M in 2024 to 78.39M in 2025, a +9.8% increase with penetration reaching 149.5%. The penetration rate exceeding 100% confirms the widespread prevalence of multi-SIM usage driven by consumers holding lines across different networks to benefit from operator-specific on-net tariffs and bundle pricing. Safaricom commands the dominant market share, with Airtel Kenya and Telkom Kenya serving secondary segments. The CA's consumer-oriented regulatory framework, combined with heavy operator investment in 4G and nascent 5G, continues to consolidate Kenya's position in the region.

Rwanda

Rwanda's mobile market, overseen by RURA, grew from 13.29M to 13.69M subscriptions (+3.0%), with penetration at 97.0%. The duopoly structure MTN Rwandacell (approximately 61%) and Airtel Rwanda (approximately 39%) provides strong network coverage across Rwanda's compact geography. Rwanda's Vision 2050 digital agenda, including the government's Smartphone for All initiative and national broadband expansion, continues to drive subscriber growth. The near-100% penetration rate signals approaching market saturation for basic mobile services, with future growth expected to come from data and value-added services.

South Sudan

South Sudan posted the highest mobile subscription growth rate in the EACO region at +21.7%, adding 1.12M subscribers to reach 6.31M by 2025. Penetration rose from 36.8% to 42.9%. While this growth is impressive in percentage terms, the absolute penetration rate of 42.9% confirms that South Sudan presents the largest opportunity for future growth. The NCA (National Communications Authority) regulates a market served primarily by MTN South Sudan, Zain/Airtel South Sudan, and Digitel, operating under challenging geopolitical and infrastructure conditions.

Tanzania

Tanzania confirms a +23.1% growth in 2025, with total subscriptions rising from 86.77M to 106.82M, an addition of over 20.05M new subscribers. Penetration climbed from 133.3% to 156.7%, cementing Tanzania's status as the EACO region's largest market by total subscriber volume. Tanzania's competitive five-operator market with Vodacom, Yas (formerly Tigo), Airtel, Halotel, and TTCL and no single operator exceeding 35% market share, drives vigorous pricing competition.

Uganda

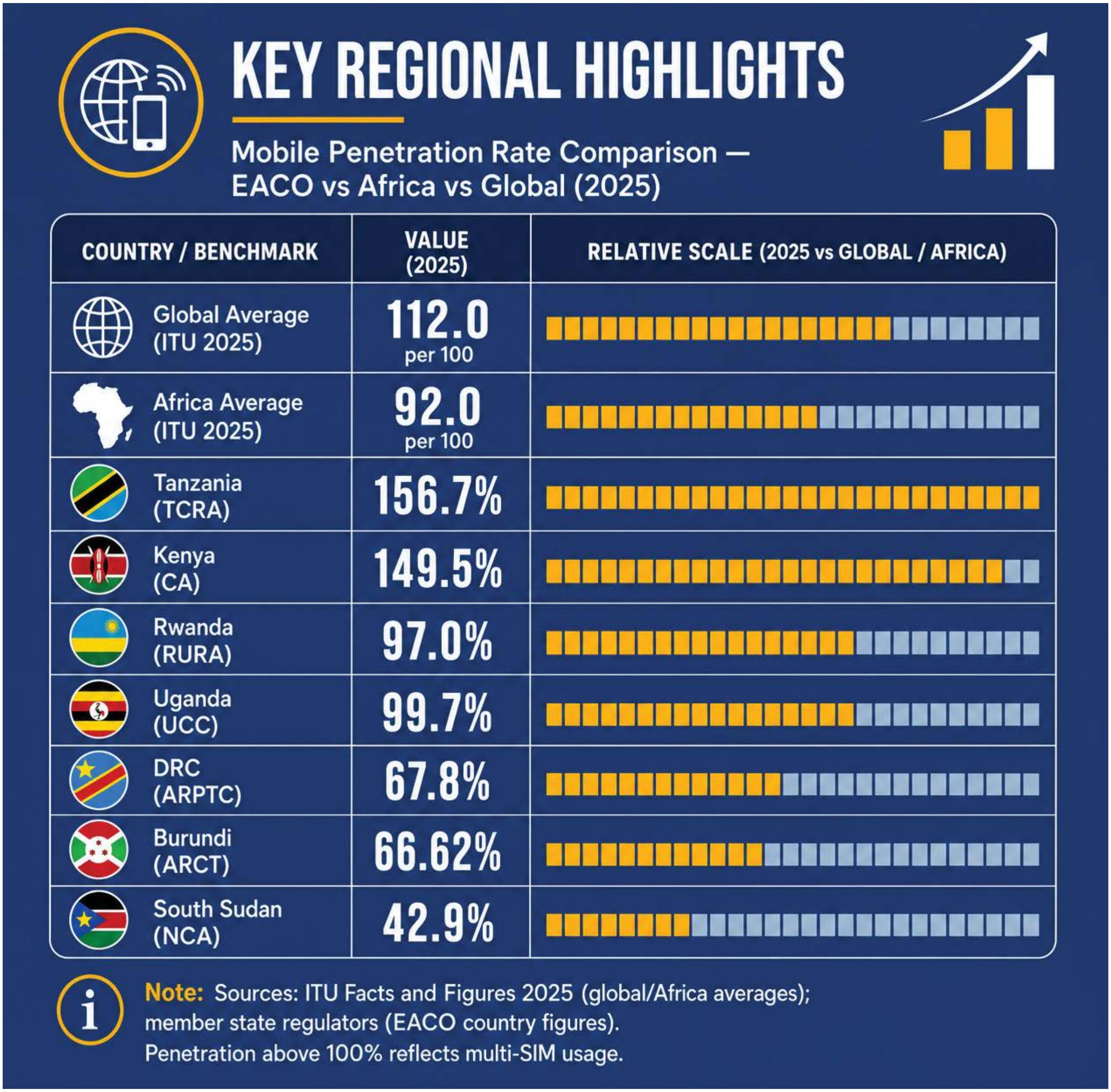
Uganda's mobile market surpassed the 40 million milestone, growing from 41.60M to 47.08M (+13.2%). The Uganda Communications Commission confirms mobile teledensity at 100% at the end of 2025, a milestone given that Uganda's penetration was effectively 0% in 2000 before market liberalisation. The market is led by MTN Uganda and Airtel Uganda, with Lycamobile serving a smaller segment.

Democratic Republic of Congo (DRC)

The DRC's mobile market delivered solid growth of +15.6%, with ARPTC-reported active subscriptions rising from 63.96M to 73.93M in 2025. Penetration improved from 60.5% to 67.8%, continuing a consistent upward trend. The market is served by Vodacom (36% subscriber share), Orange and Airtel (approximately 29% each), and Africell (6%). With a population of over 108 million and penetration still below 70%, the DRC presents the region's single largest growth opportunity in absolute subscriber terms.

Global & Africa Benchmark – Mobile Penetration (per 100 inhabitants, 2025)

The following comparison positions each EACO member state against the ITU global average (112 per 100, 2025) and the Africa average (92 per 100, 2025).



COUNTRY / BENCHMARK	VALUE (2025)	RELATIVE SCALE (2025 vs GLOBAL / AFRICA)
Global Average (ITU 2025)	112.0 per 100	
Africa Average (ITU 2025)	92.0 per 100	
Tanzania (TCRA)	156.7%	
Kenya (CA)	149.5%	
Rwanda (RURA)	97.0%	
Uganda (UCC)	99.7%	
DRC (ARPTC)	67.8%	
Burundi (ARCT)	66.62%	
South Sudan (NCA)	42.9%	

Section 2: Mobile Internet (Data) Subscriptions

Mobile internet subscriptions capture all active SIM cards subscribing to mobile broadband services (3G, 4G, 5G). This is the most critical indicator of digital adoption, economic productivity potential, and financial inclusion depth. The EACO region's data sector is growing rapidly, with South Sudan and Tanzania recording the biggest expansions in 2025.

MOBILE INTERNET SUBSCRIPTION VOLUMES

Mobile Internet Subscriptions: 2024 vs 2025

Country	2024	2025	YoY Change
Burundi	3.40M	3.74M	+9.9%
Kenya	55.37M	61.99M	+12.0%
Rwanda	10.21M	10.40M	+1.9%
South Sudan	1.77M	3.60M	+103.7%
Tanzania	47.86M	57.69M	+20.5%
Uganda	15.60M	18.54M	+18.9%
DRC	32.94M	36.98M	+12.3%
EACO TOTAL	167.15M	192.95M	+15.4%

MOBILE INTERNET PENETRATION RATES

Mobile Internet Penetration (per 100 inhabitants): 2024 vs 2025

Country	2024 Penetration (per 100 inhabitants)	2025 Penetration (per 100 inhabitants)	YoY Change
Burundi	26%	30%	+15%
Kenya	107.5%	118.3%	+10.0%
Rwanda	73.7%	73.7%	+0.1%
South Sudan	12.5%	24.5%	+95.4%
Tanzania	73.6%	84.7%	+15.1%
Uganda	34.0%	39.3%	+15.5%
DRC	31.1%	33.9%	+9.0%

Country Narratives

Burundi

Burundi's mobile internet market registered 3.74M subscriptions in 2025, up +9.9% from 3.40M. Internet penetration reached 27.9%, up from 26.0%. Seven ISPs are active in Burundi, and three of the mobile operators provide mobile broadband. The ARCT's regulatory framework and the Burundi's Digital Foundations project aimed at connecting all provinces via national fibre provide the structural foundation for further growth. The gap between mobile subscription penetration (66.62%) and internet penetration (30%) signals significant opportunity to convert existing mobile subscribers to data users.

Kenya

Kenya remained the EACO region's mobile internet leader in 2025. Mobile internet subscriptions grew from 55.37M to 61.99M, a +12.0% increase, with penetration at 118.3%. Kenya maintains a strong 4G adoption (81.2% of broadband subscriptions on 4G by mid-2025), growing 5G take-up, and a growth in satellite internet subscriptions (+104.7% in Q1 FY2024/25) driven by Starlink. Kenya's data ecosystem is driven by the highest smartphone penetration in the region at over 72%, a mature fibre backbone, and a highly competitive OTT and digital services market.

Rwanda

Rwanda reported 10.40M mobile internet subscriptions in 2025, slightly above the 10.21M of 2024 (+1.9%). At 73.7% penetration, Rwanda has one of the highest internet-to-population ratios in the region. The year-on-year growth (+1.9%) suggests the market is approaching saturation for basic internet subscriptions and that further growth will come from deeper usage (higher data volumes, richer services) rather than new subscriber additions.

South Sudan

South Sudan delivered the biggest mobile internet growth in the region: subscriptions more than doubled from

1.77M to 3.60M (+103.7%), with penetration rising from 12.5% to 24.5%. While this growth from a low base is highly encouraging, the penetration rate of 24.5% confirms South Sudan remains well below the Africa average and EACO peers. Operator investment in 3G and 4G infrastructure, supported by development partner programmes, is the primary driver.

Tanzania

Tanzania's mobile internet sector expanded, with subscriptions growing from 47.86M to 57.69M (+20.5%). Internet penetration rose from 73.6% to 84.7%. TCRA's data confirms that mobile wireless accounts for 99.6% of all internet subscriptions. The Tanzania government's 15,000 km broadband programme and TCRA's spectrum management including 5G licensing reaching 20% population coverage have catalysed this growth. The country's low data cost environment, supported by the National ICT Broadband Backbone - NICTBB backbone, helps convert coverage into active subscriptions.

Uganda

Uganda's internet subscriptions grew from 15.60M to 18.54M (+18.9%), with penetration reaching 39.3%. The growth is largely attriubted to the growth in smartphone adoption. Despite Uganda's competitively priced data at approximately USD 1.40/GB, smartphone penetration of only 35.6% constrains data subscription growth. The 40% tax burden on smartphones (import duty and VAT under the Excise Duty Act) remains a structural barrier.

DRC

The DRC's mobile internet market grew from 32.94M to 36.98M subscriptions (+12.3%). At 33.9% penetration, the DRC is closing the gap with Africa's average gradually. ARPTC data confirms mobile internet revenue reached USD 970.2 million in 2025 nearly matching voice revenue for the first time.

Global & Africa Benchmark – Mobile Internet Penetration (2025)

Mobile Internet Penetration Comparison – EACO vs Africa vs Global (2025)

Country / Benchmark	Value	Relative Scale (2025 vs Global / Africa)
Global Average (ITU 2025)	99 per 100	
Africa Average (GSMA 2024)	~28%	
Kenya (CA)	118.3%	
Tanzania (TCRA)	84.7%	
Rwanda (RURA)	73.7%	
Uganda (UCC)	39.3%	
DRC (ARPTC)	33.9%	
Burundi (ARCT)	30%	
South Sudan (NCA)	24.5%	

Note: Sources: ITU Facts & Figures 2025; GSMA Mobile Economy Africa 2025; member state regulators. Kenya's figure >100% reflects multiple data SIMs per user.

Section 3: Mobile Money Subscriptions

Mobile money is East Africa's most transformative digital financial innovation. This section presents subscription volumes, year-on-year trends, transaction values, and global benchmarks. Data is presented for all seven EACO member states for subscriptions. Mobile money transaction values are not reported by DRC and South Sudan to EACO.

MOBILE MONEY SUBSCRIPTION VOLUMES

Mobile Money Subscriptions: 2024 vs 2025

Country	2024	2025	YoY Change
Burundi	2.57M	2.55M	-0.9%
Kenya	42.30M	51.36M	+21.4%
Rwanda	7.29M	8.14M	+11.5%
South Sudan	1.72M	1.89M	+10.1%
Tanzania	63.21M	76.47M	+21.0%
Uganda	32.13M	35.61M	+10.8%
DRC	29.03M	34.34M	+18.3%
EACO TOTAL	**178.25M**	**210.35M**	**+18.0%**

MOBILE MONEY TRANSACTION VALUES (VALUES IN USD)

Mobile Money Transaction Value (USD Equivalent): 2024 vs 2025

Country	FX Rate 2024	2024 (USD Bn)	FX Rate 2025	2025 (USD Bn)	YoY (USD)
Burundi (BIF)	2,897	USD 4.75 Bn	2,954	USD 4.25 Bn	-10.5%
Kenya (KES)	129.0	USD 57.04 Bn	129.5	USD 66.87 Bn	+17.2%
Rwanda (RWF)	1,401	USD 6.58 Bn	1,444	USD 9.48 Bn	+44.1%
Tanzania (TZS)	2,686	USD 63.36 Bn	2,530	USD 74.09 Bn	+16.9%
Uganda (UGX)	3,679	USD 73.76 Bn	3,670	USD 91.19 Bn	+23.6%
REPORTING TOTAL	—	**USD 205.49 Bn**	—	**USD 245.78 Bn**	**+19.6%**

Note: USD conversions use December 31 year-end mid-market rates.
Reporting Total covers five countries (Burundi, Kenya, Rwanda, Tanzania, Uganda).
South Sudan and DRC excluded.

Country Narratives

Across the five reporting EACO countries, total mobile money transaction values grew from USD 205.49 billion in 2024 to USD 245.78 billion in 2025, a USD increase of +19.6%. Uganda leads in absolute USD volume at USD 91.19 billion, followed by Tanzania at USD 74.09 billion and Kenya at USD 66.87 billion. Rwanda delivered the highest growth rate at +44.1% in USD terms.

Burundi

Burundi’s mobile money market recorded 2.55 million subscriptions in 2025, a slight decline of -0.9% from the 2.57 million of 2024. This marginal contraction is attributable to account consolidation and operator-driven cleanup of inactive accounts rather than market retreat, a common occurrence as regulators enforce KYC compliance. Transaction value also declined (-8.8%) in US Dollar (USD) terms, reflecting monetary factors and changes in active account counting methodology. Burundi therefore posted a USD transaction value of USD 4.3 billion at the end of 2025.

Despite this, Burundi’s mobile money sector has achieved 140% growth in accounts over the preceding four years, and three operators including Viettel (Lumu-Cash), Econet Leo (Eco cash) and I-Hela provide nationwide services. Deepening active user rates and use-case expansion (bill payments, savings, agri-payments) remain the priority.

Kenya

Kenya’s mobile money ecosystem continued its dominant growth. Subscriptions grew from 42.30 million to 51.36 million (+21.4%), while transaction value grew from USD 57.04 billion to USD 66.87 billion (+17.7%). M-Pesa (Safaricom), the world’s most studied mobile money platform, anchors the Kenyan ecosystem. The expanding use case landscape merchant payments (Lipa na M-Pesa), international remittances, savings (M-Shwari, KCB M-Pesa), insurance (M-Tiba), and agricultural payments drive both subscription and transaction growth well beyond basic P2P transfers.

Rwanda

Rwanda’s mobile money sector delivered the most impressive transaction value growth in the region. Subscriptions grew from 7.29M to 8.14M (+11.5%), while transaction value jumped from USD 6.58 billion to 9.48 billion (+44.1%). This value growth nearly 50% in a single year reflects Rwanda's rapid progression toward a cashless economy, driven by the National Payment Strategy, government mandate for digital salary payments, and expanding merchant payment infrastructure.

South Sudan

South Sudan's mobile money market continued to grow, with subscriptions rising from 1.72M to 1.89M (+10.1%). The expansion of mobile money into South Sudan is critical for financial inclusion given the extremely low formal banking penetration.

Tanzania

Tanzania's mobile money market is one of the most competitive in Africa. Subscriptions grew from 63.21M to 76.47M (+21.0%), with transaction value rising from USD 63.36 billion to USD 74.09 billion (+16.9%). Three providers including M-Pesa, Airtel Money, and Mixx by Yas/Tigo Pesa, who collectively hold approximately 89% of the market have driven mobile money adoption using different use cases.

Uganda

Uganda's mobile money sector continued its steady growth. Subscriptions grew from 32.13M to 35.61M (+10.8%), with transaction value rising from USD 73.76 billion to USD 91.19 billion (+23.6%). MTN Mobile Money (MoMo) and Airtel Money are the dominant providers. The growth is largely driven by the expansion of mobile finance use cases that are driving adoption.

Global & Africa Benchmark — Mobile Money

Mobile Money Subscriptions as % of Total Mobile Subs (2025)

COUNTRY / BENCHMARK	VALUE	RELATIVE SCALE (2025 vs GLOBAL / AFRICA)
Sub-Saharan Africa avg (GSMA 2025)	~65% (SSA)	
Global: 2B+ registered (GSMA 2025)	2B+ globally	
Tanzania (TCRA)	71.6%	
Kenya (CA)	65.5%	
Uganda (UCC)	75.6%	
DRC (ARPTC)	46.4%	
Rwanda (RURA)	59.4%	
South Sudan (NCA)	30.0%	
Burundi (ARCT)	30.1%	

NOTE: Mobile money subscriptions as % of total mobile subscriptions. SSA figure from GSMA State of the Industry Report 2026.

Section 4: On-Net Voice Traffic

On-net voice traffic — calls originating and terminating on the same operator's network — is the dominant voice segment in markets with one large operator. High on-net volumes reflect network scale, preferential on-net tariff structures, and subscriber concentration. This section covers all seven EACO member states.

ON-NET VOICE TRAFFIC VOLUMES

On-Net Voice Traffic (Minutes): 2024 vs 2025

COUNTRY	2024 (BILLION MIN)	2025 (BILLION MIN)	YOY CHANGE
BURUNDI	1.5B	2.4B	+60.0%
KENYA	76.5B	100.1B	+31.0%
RWANDA	26.0B	31.7B	+21.6%
SOUTH SUDAN	3.8B	6.7B	+74.4%
TANZANIA	77.8B	90.0B	+15.7%
UGANDA	76.3B	81.9B	+7.3%
DRC	10.8B	11.5B	+5.9%
EACO TOTAL	272.8B	324.3B	+18.9%

Analysis and Insights

The EACO region generated a combined 324.3 billion on-net voice minutes in 2025, up from 272.8 billion in 2024. The two largest on-net markets are Kenya (100.1 billion minutes) and Uganda (81.9 billion minutes), followed closely by Tanzania (90.0 billion minutes). These three markets together account for the vast majority of regional on-net traffic.

South Sudan recorded the biggest jump in on-net traffic growth at +74.4%, rising from 3.8 billion to 6.7 billion minutes. This reflects rapid market expansion from a very low base as operators build out their networks and subscriber bases grow. Burundi also recorded strong growth of +60.0%, reaching 2.4 billion minutes. Kenya's on-net traffic expanded by +31.0% to 100.1 billion minutes, driven by Safaricom's dominant subscriber base creating a strong network effect where the majority of calls naturally remain on-net.

ON-NET VS TOTAL VOICE TRAFFIC PROPORTION

On-Net Share of Total Voice Traffic (On-Net + Off-Net), 2025

COUNTRY / BENCHMARK	VALUE	RELATIVE SCALE (2025 vs Global / Africa)
Rwanda (RURA)	59.6%	
Uganda (UCC)	93.2%	
Tanzania (TCRA)	50.4%	
Kenya (CA)	83.8%	
DRC (ARPTC)	78.5%	
South Sudan (NCA)	89.4%	
Burundi (ARCT)	92.6%	

NOTE: On-net share above 80% typically indicates a dominant operator with strong network effects. Rwanda's high ratio reflects MTN's dominant 61% subscriber share.

Section 5: Off-Net Voice Traffic

Off-net voice traffic is described as voice traffic from one operator's subscribers terminating on a different operator's or fixed network. This drives interconnection revenue flows and is a key metric for regulators setting Mobile Termination Rates (MTRs). High off-net growth in emerging markets like South Sudan and Uganda signals expanding market competition and subscriber cross-network calling behaviour.

Off-Net Voice Traffic Volumes

Off-Net Voice Traffic (Minutes): 2024 vs 2025

Country	2024 (Million Min)	2025 (Million Min)	YoY Change
Burundi	132.5M	191.2M	+44.3%
Kenya	12,195.8M	19,322.8M	+58.4%
Rwanda	19,396.4M	21,443.8M	+10.6%
South Sudan	307.5M	798.0M	+159.5%
Tanzania	67,110.8M	88,394.9M	+31.7%
Uganda	3,908.2M	5,950.5M	+52.3%
DRC	2,722.5M	3,155.8M	+15.9%
EACO Total	**105,773.8M**	**139,257.0M**	**+31.7%**

Analysis and Insights

The EACO region's total off-net voice traffic grew from 105,773.8 million minutes in 2024 to 139,257.0 million minutes in 2025. Tanzania dominates by absolute volume at 88,394.9 million minutes, followed by Rwanda at 21,443.8 million minutes and Kenya at 19,322.8 million minutes.

The most striking off-net growth story is South Sudan, where traffic grew +159.5%, from 307.5 million minutes to 798.0 million minutes. This growth reflects both a very low base and rapid market expansion as operator networks cover more territory and subscriber numbers grow across multiple providers. Uganda also posted strong off-net growth of +52.3%, from 3,908.2 million minutes to 5,950.5 million minutes driven by competitive dynamics between MTN Uganda and Airtel Uganda, and regulatory interventions including the downward revision of Mobile Terminaton Rates (MTR) in early 2025.

Kenya's off-net traffic grew +58.4%, the second highest growth rate after South Sudan, which was a notable shift given that Safaricom's dominant position historically kept most traffic on-net. The growth in off-net calling reflects Airtel Kenya's expanding subscriber base and the growing number of subscribers actively using multiple SIMs across operators. Tanzania's +31.7% off-net growth and Rwanda's +10.6% reflect mature competitive markets with relatively stable traffic patterns.

Section 6: Mobile Data Traffic

Mobile data traffic measured in gigabytes (GB) of data consumed across mobile networks — captures the actual depth of digital engagement beyond subscription counts. This is the most powerful indicator of digital economy maturity and network capacity requirements. The EACO region's data volumes in 2025 reflect both the scale of connectivity and the intensity of digital usage.

MOBILE DATA TRAFFIC VOLUMES

Mobile Data Traffic (Gigabytes): 2024 vs 2025

COUNTRY	2024 VOLUME	2025 VOLUME	YOY CHANGE
Burundi	61.9 M GB	120.1 M GB	+94.0%
Kenya	1.92 Bn GB	2.63 Bn GB	+37.0%
Rwanda	461 M GB	517 M GB	+12.2%
South Sudan	60.0 M GB	71.1 M GB	+18.5%
Tanzania	1.36 Bn GB	1.41 Bn GB	+3.5%
Uganda	0.82 Bn GB	1.04 Bn GB	+27.5%
DRC	1.08 Bn GB	1.64 Bn GB	+51.3%

Analysis and Insights

Kenya stands apart as the EACO region's data traffic giant. With 2.63 Billion GBs consumed in 2025 up +37% from 1.08 Billion GBs in 2024. This growth is consistent with its mature 4G ecosystem and high smartphone penetration.

Burundi recorded the bigggest YoY jump with traffic of 120.1 Million GBs up +94% from the 61.9 Million GBs in 2024. This is largely attributed to broadband infrastructure rollouts in the country. Tanzania's data volume of 1.41 billion GB grew by +3.5% suggesting that Tanzania's growth story is more about subscriber additions than yet deepening per-subscriber consumption, with significant usage intensity growth expected as the 4G and 5G user base matures.

Uganda posted strong data volume growth of +27.5%, reaching 1.04 billion GB. The mobile data traffic segment in Uganda remains the the biggest driver to industry revenue besides mobile voice traffic. South Sudan grew +18.5% to 71.1 million GB, consistent with its rapidly expanding internet user base.

MOBILE DATA TRAFFIC VOLUMES

Mobile Data Traffic (Gigabytes): 2024 vs 2025

COUNTRY	2024 VOLUME	2025 VOLUME	YOY CHANGE
Burundi	61.9 M GB	120.1 M GB	+94.0%
Kenya	1.92 Bn GB	2.63 Bn GB	+37.0%
Rwanda	461 M GB	517 M GB	+12.2%
South Sudan	60.0 M GB	71.1 M GB	+18.5%
Tanzania	1.36 Bn GB	1.41 Bn GB	+3.5%
Uganda	0.82 Bn GB	1.04 Bn GB	+27.5%
DRC	1.08 Bn GB	1.64 Bn GB	+51.3%

Section 7: ONA Inbound Traffic

One Network Area (ONA) Inbound Traffic measures ONA traffic voice minutes terminating/incoming onto EACO country networks from EACO Member states including Kenya, Rwanda, South Sudan, Uganda, Tanzania and Burundi. This metric is critical for cross-boarder voice settlement accounting, understanding EACO membership calling patterns, and assessing the value of ONA voice traffic.

Note: DRC does not report ONA data; South Sudan 2024 inbound data was not available (2025 figure provided).

ONA INBOUND TRAFFIC VOLUMES

ONA Inbound Traffic (Minutes): 2024 vs 2025

COUNTRY	2024 (MILLION MIN)	2025 (MILLION MIN)	YOY CHANGE
Burundi	89.6M	202.9M	+126%
Kenya	387.3M	461.5M	+19.2%
Rwanda	76.1M	107.4M	+41.0%
South Sudan	N/A	180.5M	N/A (2024 not available)
Tanzania	108.5M	148.0M	+36.4%
Uganda	1,103.2M	794.4M	-28.0%
DRC	N/A	N/A	N/A (DRC does not report ONA data)

NOTE: N/A: DRC does not report ONA data.
South Sudan 2024 inbound data not available.
Uganda's 2025 figure shows a decline of - 27.99%, requiring operator-level investigation.

Analysis and Insights

Burundi recorded the highest growth in ONA inbound traffic segment, growing by 126%, with inbound minutes rising from 89.6 million to 202.9 million. This growth was primarily driven by the integration of Burundi's mobile networks into the ONA regional roaming framework following the country's recent accession. As ONA member states progressively onboarded major Burundian operators including Lumitel (Lumi cash) and Econet Leo (Ecocash), through their roaming platforms, traffic volumes increased significantly. The growth was further supported by the reduction of roaming tariffs under the ONA Project, which encouraged greater usage of cross-border communication services among member countries.

Kenya, with its large diaspora and significant business connectivity, received 461.5 million inbound minutes (+19.2%).

Rwanda's inbound traffic grew +41.0% to 107.4 million minutes, consistent with Rwanda's growing international business and tourism profile. Tanzania's inbound traffic grew +36.4% to 148.0 million minutes.

Uganda's ONA inbound traffic declined -28.0% from 1,103.2 million to 794.4 million minutes, largely driven by Over the Top Services (OTTs) substituting traditional voice traffic services.

Section 8: ONA Outbound Traffic

ONA Outbound Traffic measures international voice minutes originating from EACO country networks and terminating to other ONA Member States. This metric is important for understanding international calling behaviour, settlement payment flows, and the relative cost of international voice connectivity for consumers and businesses.

ONA OUTBOUND TRAFFIC VOLUMES

ONA OUTBOUND TRAFFIC (MINUTES): 2024 vs 2025

COUNTRY	2024 (MILLION MIN)	2025 (MILLION MIN)	YOY CHANGE
BURUNDI	12.1M	22.1M	▲ +82.4%
KENYA	487.2M	603.5M	▲ +23.9%
RWANDA	54.6M	74.0M	▲ +35.4%
SOUTH SUDAN	N/A	N/A	N/A
TANZANIA	363.3M	577.7M	▲ +59.0%
UGANDA	125.3M	163.4M	▲ +30.4%
DRC	N/A	N/A	N/A

NOTE: N/A: DRC and South Sudan do not report ONA outbound data to EACO.

Analysis and Insights

Tanzania recorded the highest growth in ONA outbound traffic, with minutes increasing by +59.0% from 363.3 million to 577.7 million. The growth reflects the continued onboarding of Tanzanian mobile networks onto the roaming platforms of other ONA member states. As integration efforts expanded across major operators such as Vodacom Tanzania, Airtel Tanzania, Yas Tanzania, and Halotel, roaming connectivity and service availability improved, driving continued growth in outbound traffic.

Burundi posted the second highest outbound growth (+82.4%), from 12.1 million minutes to 22.1 million minutes consistent with its strengthening international connectivity.

This growth reflects the ongoing integration of Burundi into the ONA regional roaming framework following its recent membership. During the period, ONA member states expanded roaming connectivity with Burundi's principal mobile operators Lumitel and Econet Leo.

Kenya originated the largest outbound volume at 603.5 million minutes (+23.9%), reflecting its hub role in the region's international telecommunications. Rwanda grew outbound traffic by +35.4% to 74.0 million minutes consistent with its growing international business and conference tourism profile.

Section 9: East African Consumer Usage Profile

This section analyses the depth and intensity of telecommunications consumption on a per-subscriber basis across all seven EACO member states. Per-subscriber metrics, computed by dividing aggregate annual traffic volumes by the number of active mobile subscriptions reveal how individual consumers are using services, enabling meaningful cross-country comparison independent of market size.

Per-subscriber metrics are calculated using active SIM subscriptions (90-day revenue-generating basis) as the denominator.

On-Net Voice Minutes per Subscriber per Year

On-net voice intensity is highest in Rwanda (2,313.2 min/sub/yr) and Uganda (1,739.9 min/sub/yr), reflecting strong operator on-net bundle ecosystems and deep voice calling cultures. Kenya (1,277.4 min/sub/yr) and South Sudan (1,062.7 min/sub/yr) follow, while Tanzania (842.5 min/sub/yr), Burundi (282.5 min/sub/yr), and DRC (155.4 min/sub/yr) are lower, with DRC and Burundi both reflecting markets where subscribers have lower average calling frequency.

ON-NET VOICE MINUTES PER SUBSCRIBER PER YEAR: 2024 VS 2025

COUNTRY	2024 (MIN)	2025 (MIN)	YOY CHANGE	REGIONAL RANK 2025
BURUNDI	182.1	282.5	▲ +55.1%	#6
KENYA	1,071.1	1,277.4	▲ +19.3%	#3
RWANDA	1,959.1	2,313.2	▲ +18.1%	#1
SOUTH SUDAN	741.3	1,062.7	▲ +43.4%	#4
TANZANIA	896.3	842.5	▼ -6.0%	#5
UGANDA	1,835.4	1,739.9	▼ -5.2%	#2
DRC	169.6	155.4	▼ -8.3%	#7

Note: All values in minutes per active subscriber per year.

Source: Computed from member state regulator aggregate traffic data divided by active subscription counts.

Off-Net Voice Minutes per Subscriber per Year

Rwanda's off-net voice intensity (1,566.9 min/sub/yr) stands above all other EACO markets, a structural reflection of RURA's equal on-net/off-net tariff policy that eliminates financial barriers to cross-network calling. Tanzania (827.5 min/sub/yr) ranks second, a product of its balanced competitive market structure. Kenya (246.5 min/sub/yr) follows. Uganda (126.4 min/sub/yr) and DRC (42.7 min/sub/yr) have lower off-net intensities driven by operator pricing dynamics. Burundi (22.6 min/sub/yr) remains the lowest, reflecting limited cross-operator competition and low market maturity.

Off-Net Voice Minutes per Subscriber per Year: 2024 vs 2025

Country	2024 (Min)	2025 (Min)	YoY Change	Regional Rank 2025
Burundi	16.1	22.6	+39.9%	#7
Kenya	170.9	246.5	+44.3%	#3
Rwanda	1,459.8	1,566.9	+7.3%	#1
South Sudan	59.3	126.5	+113.3%	#4
Tanzania	773.4	827.5	+7.0%	#2
Uganda	94.0	126.4	+34.5%	#5
DRC	42.6	42.7	+0.3%	#6

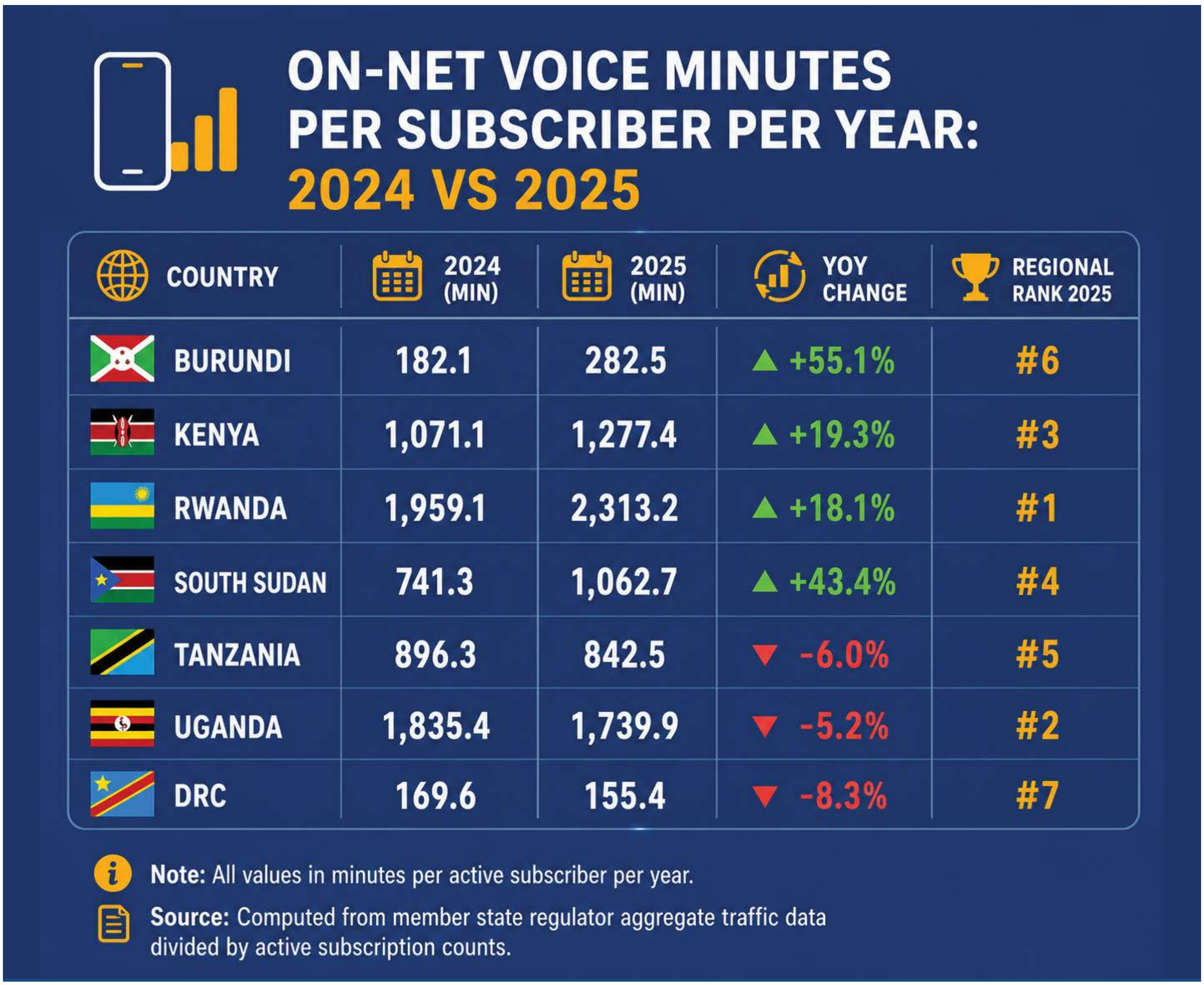
Note: All values in minutes per active subscriber per year.

Source: Member state regulator off-net voice traffic aggregates divided by active subscription counts.

Mobile Data (GB) per Subscriber per Year

Uganda (56.12 GB/sub/yr) and Rwanda (49.66 GB/sub/yr) lead the EACO region in per-subscriber data intensity, driven by growing smartphone penetration and 4G infrastructure. The DRC (43.25 GB/sub/yr) ranks third, a result that reflects the intensely data-hungry behaviour of DRC's urban 4G user base despite relatively lower overall connectivity. Similarly, Kenya stands at (42.35 GB/sub/yr) driven by a mobile data eco system that has use cases beyond mobile financial services.

Tanzania (24.47 GB/sub/yr) and South Sudan (19.75 GB/sub/yr) show per-subscriber data intensities that are declining or flat as rapid subscriber additions (many feature-phone users) dilute the averages. Burundi's 32.12 GB/sub/yr represents impressive growth (+77%) from a low base.


ON-NET VOICE MINUTES PER SUBSCRIBER PER YEAR: 2024 VS 2025

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KENYA	1,071.1	1,277.4	▲ +19.3%	#3
RWANDA	1,959.1	2,313.2	▲ +18.1%	#1
SOUTH SUDAN	741.3	1,062.7	▲ +43.4%	#4
TANZANIA	896.3	842.5	▼ -6.0%	#5
UGANDA	1,835.4	1,739.9	▼ -5.2%	#2
DRC	169.6	155.4	▼ -8.3%	#7

Note: All values in minutes per active subscriber per year.

Source: Computed from member state regulator aggregate traffic data divided by active subscription counts.

Across the EACO region, four broad usage archetypes emerge from the per-subscriber data.

The High-Intensity Voice Markets (Rwanda, Uganda, Kenya) are characterised by strong voice calling habits, high on-net bundle usage, and growing data consumption. These are markets where mobile is the primary communications platform for both voice and data.

The Rapid Growth Markets (Burundi, South Sudan) show strong growth rates across most metrics from low bases, reflecting infrastructure expansion enabling new usage behaviours. Data intensity is accelerating fastest here.

The Subscription-Diluted Markets (Tanzania) exhibit declining per-subscriber averages masked by aggregate growth, driven by rapid subscriber onboarding of predominantly feature-phone users. Per-subscriber intensity will recover gradually.

The Data-Dominant Large Market (DRC) presents a unique profile where data intensity per subscriber rivals regional leaders despite lower overall connectivity, reflecting the highly concentrated, data-intensive urban user base that drives the DRC's aggregate data volumes.

These usage profiles have direct implications for operator investment priorities, regulatory spectrum management, and national broadband policy. Markets with high per-subscriber data intensity require continued 4G capacity investment and 5G roadmaps whereas markets in the Rapid Growth phase require affordable device strategies to sustain the transition from voice-only to data-capable usage. Markets experiencing per-subscriber dilution require targeted digital literacy and usage stimulation programmes to accelerate the consumption maturation of new subscriber cohorts.

Section 10: Regional Summary Dashboard

ALL METRICS — 2024 vs 2025 SUMMARY

EACO FULL METRICS SUMMARY — ALL COUNTRIES: 2025 (WITH YOY CHANGE)

METRIC / COUNTRY	BURUNDI	KENYA	RWANDA	S. SUDAN	TANZANIA	UGANDA	DRC
MOBILE SUBS (M)	8.2 M	78.4M	13.7M	6.3M	106.8M	47.1M	73.9M
MOBILE PEN. (%)	66.62%	149.5%	97.0%	42.9%	156.7%	99.7%	67.8%
INTERNET SUBS (M)	3.7M	62.0M	10.4M	3.6M	57.7M	18.5M	37.0M
INTERNET PEN. (%)	30%	118.3%	73.7%	24.5%	84.7%	39.3%	33.9%
M-MONEY SUBS (M)	2.6M	51.4M	8.1M	1.9M	76.5M	35.6M	34.3M
ONNET (BN MIN)	2.4B	100.1B	31.7B	6.7B	90.0B	81.9B	11.5B
OFFNET (M MIN)	191.2M	19,322.8M	21,443.8M	798.0M	88,394.9M	5,950.5M	3,155.8M
DATA TRAFFIC	120M GB	2.6Bn GB	517M GB	71M GB	1.4Bn GB	1.0Bn GB	1.6Bn GB

Note: Sources: All member state regulators. M=million, Bn=billion.

YEAR-ON-YEAR GROWTH RATES – ALL METRICS SUMMARY

YoY GROWTH RATES BY COUNTRY AND METRIC (2024 TO 2025)

Metric	Burundi	Kenya	Rwanda	S. Sudan	Tanzania	Uganda	DRC
Mobile Subs	-3%	+9.8%	+3.0%	+21.7%	+23.1%	+13.2%	+15.6%
Mobile Internet	+9.9%	+12.0%	+1.9%	+103.7%	+20.5%	+18.9%	+12.3%
Mobile Money	-0.9%	+21.4%	+11.5%	+10.1%	+21.0%	+10.8%	+18.3%
On-Net Voice	+60.0%	+31.0%	+21.6%	+74.4%	+15.7%	+7.3%	+5.9%
Off-Net Voice	+44.3%	+58.4%	+10.6%	+159.5%	+31.7%	+52.3%	+15.9%
Data Traffic	+94.0%	+37.0%	+12.2%	+18.5%	+3.5%	+27.5%	+51.3%
MM Txn Value	-8.8%	+17.7%	+48.5%	N/A	+10.1%	+23.3%	N/A

Green = positive growth

Red = negative growth

N/A = data not reported to EACO

Note: All figures are YoY percentage changes

Annex A: Data Sources

EACO Member State Regulators and Data Sources			
Country	Regulator	Acronym	Website
Burundi	Agence de Régulation et de Contrôle des Télécommunications	ARCT	arct.gov.bi
DRC	Autorité de Régulation de la Poste et des Télécommunications du Congo	ARPTC	arptc.gouv.cd
Kenya	Communications Authority of Kenya	CA	ca.go.ke
Rwanda	Rwanda Utilities Regulatory Authority	RURA	rura.rw
South Sudan	National Communications Authority	NCA	nca.gov.ss
Tanzania	Tanzania Communications Regulatory Authority	TCRA	tcra.go.tz
Uganda	Uganda Communications Commission	UCC	ucc.co.ug

International Benchmark Sources:

- ITU Facts and Figures 2025 — International Telecommunication Union (itu.int/itu-d/reports/statistics)
- GSMA State of the Industry Report on Mobile Money 2025 & 2026 — GSMA (gsma.com)
- GSMA Mobile Economy Sub-Saharan Africa 2024 & Africa 2025 (gsma.com/solutions-and-impact/connectivity-for-good/mobile-economy/africa)
- World Bank World Development Indicators — Mobile Cellular Subscriptions (data.worldbank.org)

Annex B: Glossary

Key Terms and Definitions	
Term	Definition
Active Mobile Subscription	A SIM card that generated revenue for the operator within the preceding 90 days.
Mobile Broadband / Internet Subscription	An active subscription to mobile data services via 3G, 4G (LTE), or 5G technology.
Mobile Money Subscription	A unique account registered with a mobile financial service provider for transactions via mobile phone.
On-Net Traffic	Voice calls originating and terminating on the same mobile network operator's network.
Off-Net Traffic	Voice calls originating on one network and terminating on a different operator's or fixed network.
ONA Inbound	International voice minutes received by a country's mobile network from overseas networks.
ONA Outbound	International voice minutes originating from a country's mobile network to overseas networks.
Mobile Data Traffic	Total volume of data (in GB) consumed across a country's mobile networks in a given period.
Penetration Rate	Number of active subscriptions per 100 inhabitants. May exceed 100% where multi-SIM is prevalent.
YoY Change	Year-on-Year percentage change, calculated as (2025 value – 2024 value) / 2024 value.
MTR	Mobile Termination Rate — the wholesale charge one operator pays another to complete a call on its network.
EACO	East African Communications Organization — regional body for Burundi, DRC, Kenya, Rwanda, South Sudan, Tanzania, Uganda.

East African Communications Organization (EACO)
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