



# GBOS



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**BY THE  
TOURISM, TRANSPORT AND COMMUNICATION STATISTICS UNIT**

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### **List of Acronyms and Abbreviations**

<b>GAMCEL</b>	Gambia Cellular Company Limited
<b>GAMTEL</b>	Gambia Telecommunication Company Limited
<b>GMD</b>	Gambian Dalasi
<b>GRTS</b>	Gambia Radio and Television Services
<b>GSM</b>	Global System for Mobile communications
<b>HHI</b>	Herfindahl-Hirschman Index
<b>ICT</b>	Information and Communication Technology
<b>IDI</b>	ICT Development Index
<b>ISPs</b>	Internet Service Providers
<b>ITU</b>	International Telecommunication Union
<b>MICS</b>	Multiple Indicator Cluster Survey
<b>PURA</b>	Public Utilities Regulatory Authority
<b>SMS</b>	Short Message Service

## Foreword

This report provides Information and Communication Technology (ICT) Statistics of The Gambia for the period 2014-2019. It presents the state of ICT infrastructure, access and use for the period under review. Most of the data in this report is from the Public Utilities Regulatory Authority (PURA), data on access to the media is from the 2018 Gambia Multiple Indicator Cluster Survey (MICS V1) report on access to the media and the data on Gross Domestic Product (GDP) is from the Gambia Bureau of Statistics, National Accounts Unit. PURA is mandated by an act to provide guidelines on rates and fees to ensure that public services are regulated and to protect the interest of the consumers and public utilities. Thus, it currently regulates the Telecommunication, Energy, Water and Sewage and Electricity sectors in the country.

The report contains data on internet subscription, volume of calls, tariffs charged, employment, the number and types of broadcasting media, the proportion of the population that had access to ICT and the Herfindahl-Hirschman Index (HHI). This report can be accessed on the Gambia Bureau of Statistics (GBoS) website (<https://www.gbosdata.org/>). Users who have specific data needs can contact the Tourism, Transport and Communication Statistics Unit of GBoS for assistance.

On behalf of the bureau of Statistics, I wish to express my profound gratitude to PURA, and the telecommunication operators for making available the necessary data for the compilation of the ICT Statistics. My special thanks to the entire staff of the Tourism, Transport and Communication Statistics Unit. I am also thankful to the Director of the Economic Statistics directorate, for facilitating the preparation of this report. I hope that users will find this report useful.

Nyakassi M.B. Sanyang

Statistician General

## **Information and Communication Technology (ICT) Statistics Report- 2014-2019**

### **1: Introduction**

This is the third report on Information and Communication indicators prepared by the Tourism, Transport and Communication Statistics unit of GBoS. The report highlights the use of and access to Information and Communication Technology (ICT) infrastructure in terms of internet subscription, volume of calls, tariffs charged, employment, number and types of broadcasting media, proportion of the population that had access to ICT, the HHI and market shares of the Global System for Mobile Communication (GSM) operators.

The importance of ICT in a country cannot be overemphasized as it can help boost various sectors of an economy, such as health, education, agriculture, tourism and the like. Improved communication network enhances the dissemination of information and has made the world a global village. Social relationships have improved through the use of ICT products and services. In addition, learning has become easier for the population at large, thus, it is important to report on the state of ICT in the country to enable better planning.

## **2. ICT Infrastructure and Access**

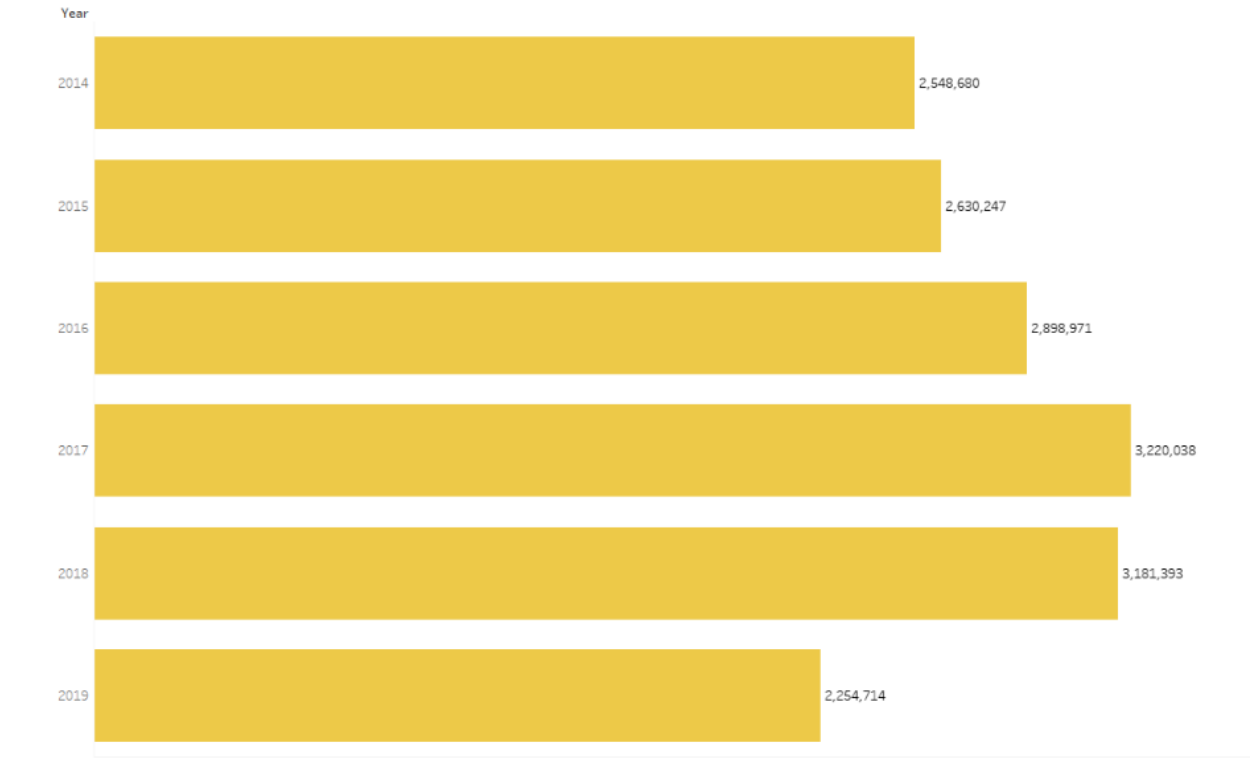
### **2.1 Service providers and available infrastructure**

There has been significant growth in the telecommunication industry over the years. There are still four mobile cellular service providers (Gancel, Africell, Comium and Qcell) while Gamtel is the only fixed line telephone provider. Qcell and Gamtel in addition to Unique Solutions, Netpage, Insist Global, Africell, Comium and Leap make up the Internet Service Providers (ISPs) in the country.

### **2.2 Mobile cellular subscriptions**

The number of active mobile subscribers has decreased from approximately 3.1 million in 2018 to about 2.2 million subscribers in 2019. The large number of subscribers is attributed to the use of more than one sim card by some subscribers and the availability of dual sim phones in the market. Also some subscribers have more than one phone (Figure1).

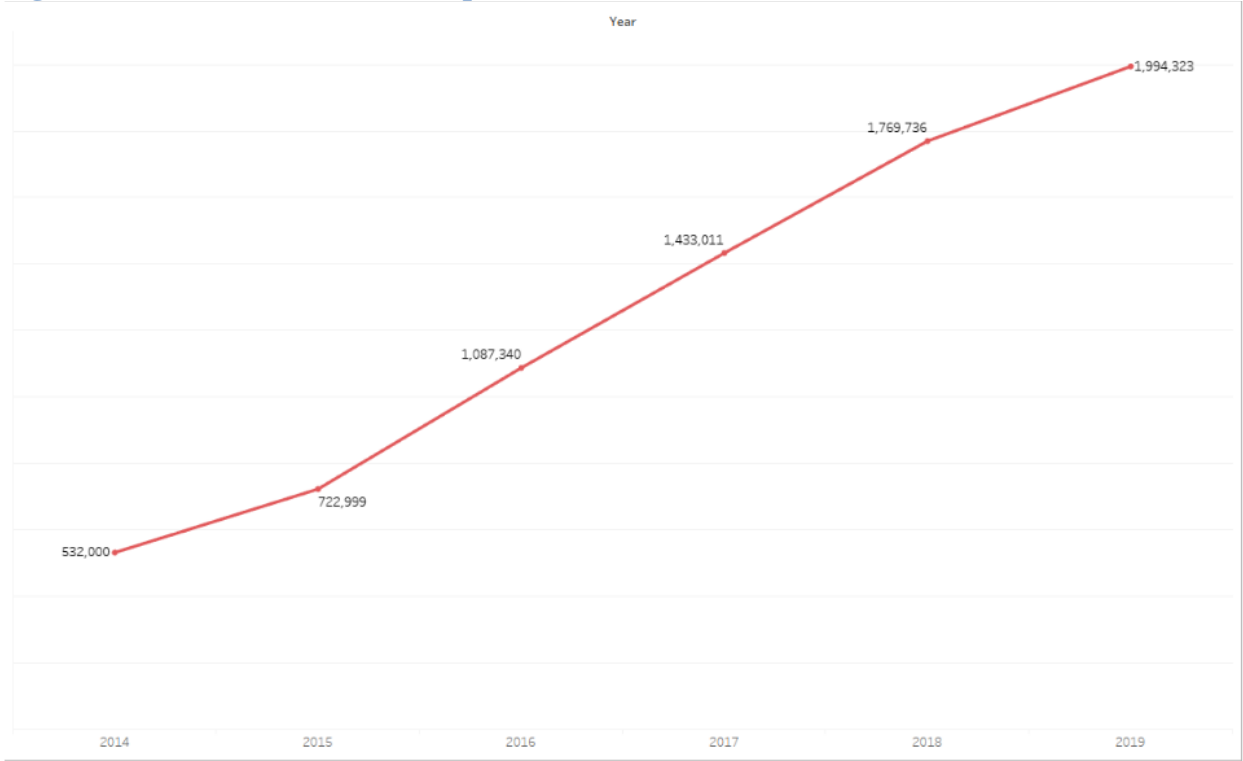
**Figure 1: Mobile Active Subscribers**



**2.3 Internet Subscriptions**

The figure below shows the increasing pattern of the total number of mobile internet subscribers in the country. This could be due to the daily need for the use of the internet as a means of connecting with friends and family and for learning purposes. The number of mobile internet subscribers increased from about 1.7 million in 2018 to approximately 1.9 million subscribers in 2019.

**Figure 2: Mobile Internet Subscriptions**



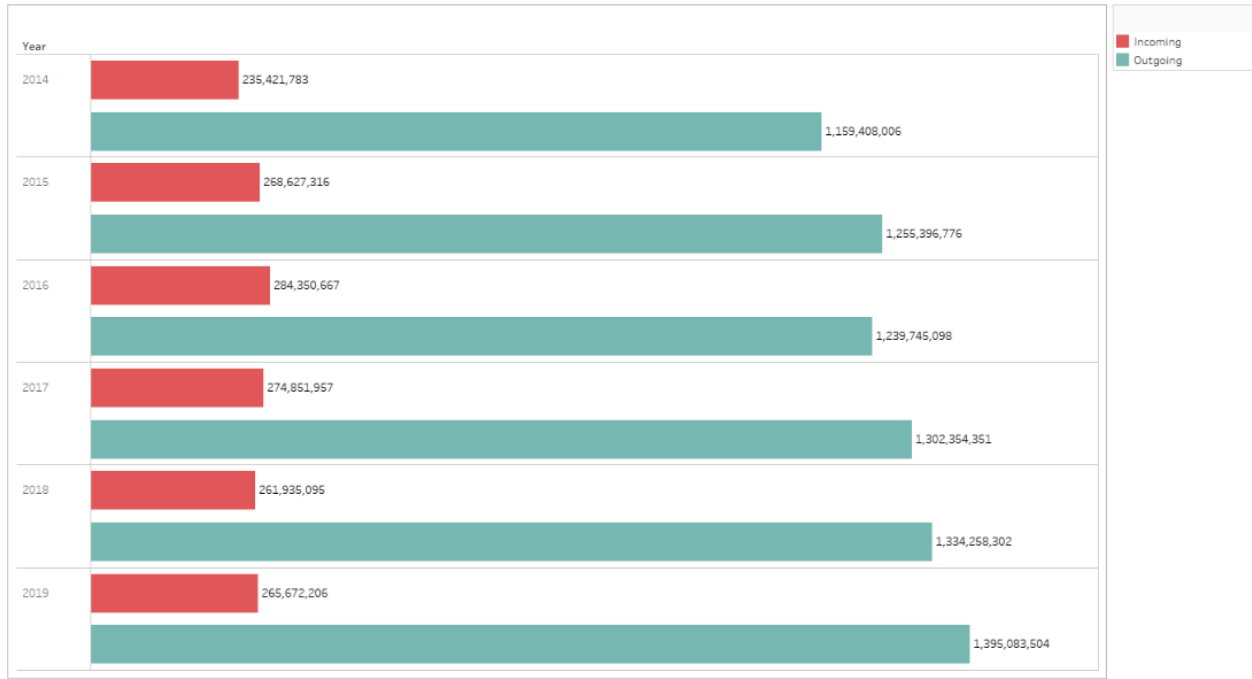
**2.4 Communication Traffic**

**2.4.1 Local calls**

Figure 3 shows that the volume of local calls has increased over the years. The minutes on incoming calls in 2019 (265 billion) were about 3.7 million more than the minutes in 2018 (261 billion). For the outgoing local calls, the minutes of calls increased from about 1.3 billion in 2018 to about 1.4 billion in 2019.



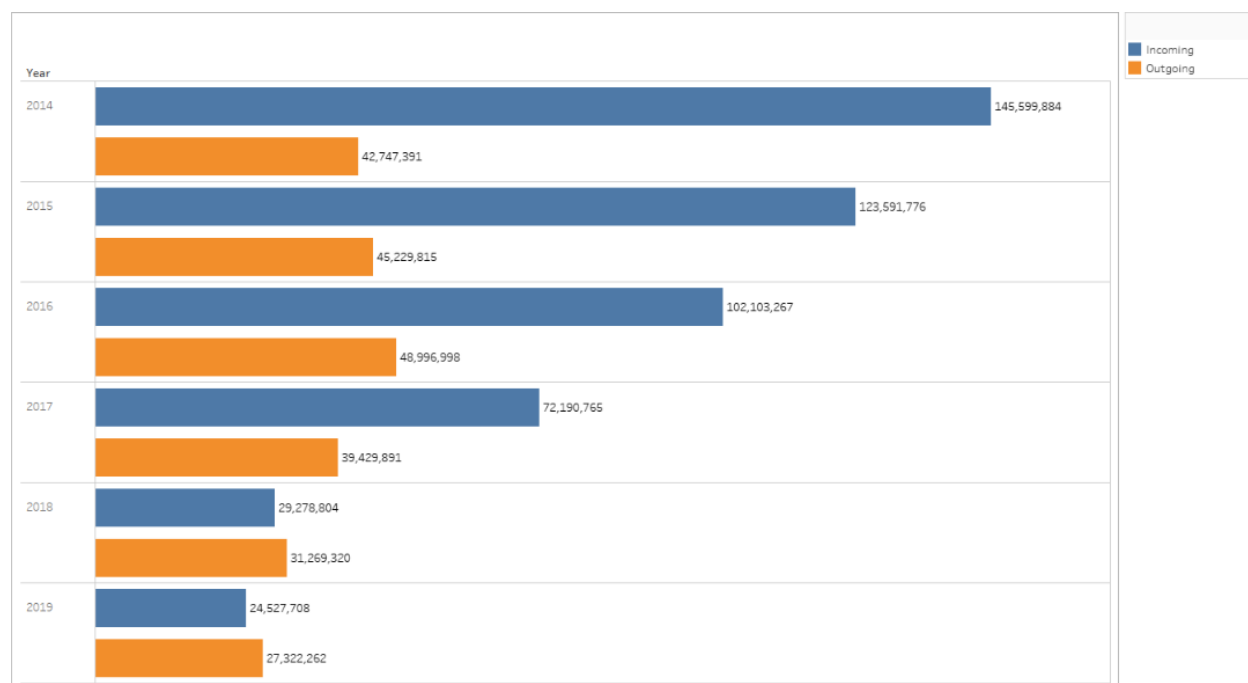
**Figure 3: Volume of Local Calls**



### 2.4.2 International calls

The traffic for international calls has been decreasing over the years as shown in the figure below. This could be due to the increase in the use of the social media platforms especially WhatsApp, Viber and Facebook as other means of communication. The minutes on incoming international calls decreased from about 29 million minutes in 2018 to about 24 million minutes in 2019. In the same vein, the traffic for outgoing international calls decreased from about 31 million minutes in 2018 to about 27 million minutes in 2019 (Figure 4).

**Figure 4: Volume of International Calls**

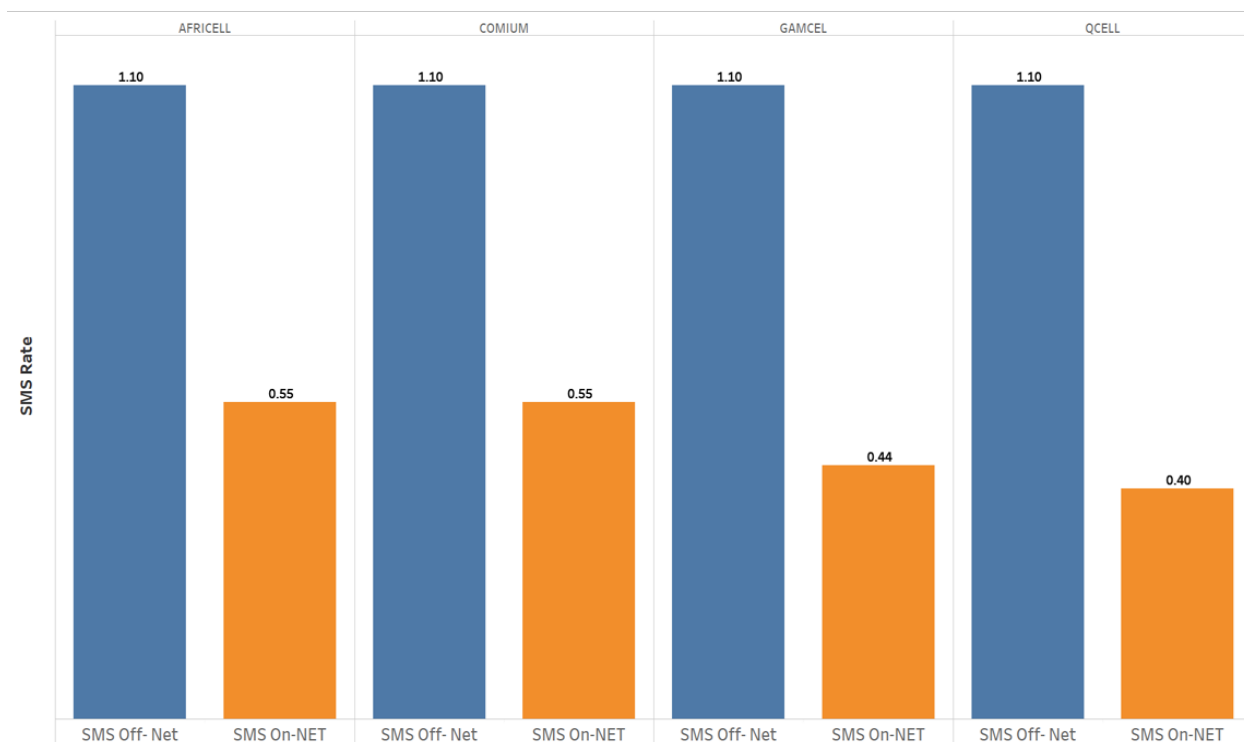


## 2.5 Tariffs

### 2.5.1 Short Message Service (SMS)

The Global System for Mobile communications (GSM) operators charged the same tariffs for Short Message Service (SMS) in both 2018 and 2019 for prepaid services. The average rate charge by all the GSM operators is GMD 1.1 per SMS for off-net (different network) SMS. However, for on-net (same network) SMS, Qcell charges a relatively smaller rate of GMD 0.40 per SMS than the other operators who charge GMD 0.44(Gamcel) and GMD 0.55 by both Africell and Comium (Figure 5).

**Figure 5: Short Message Service Rates**



### 3. ICT access and use

#### 3.1 ICT access by households

During the 2018 Gambia Multiple Indicator Cluster Survey (MICS), 7,405 households were interviewed to assess the level of access to ICT infrastructure within households. The MICS result shows that, 69.3 per cent of households have a radio, and 52.6 per cent a TV. Slightly above 98.0 per cent of households have a telephone (fixed line or mobile phone). About 19.0 per cent of the households have a computer and the proportion of the households who reported to have access to the internet by any device from home is 63.3 per cent.

## **4. Contribution of ICT sector to the economy**

### **4.1 Employment**

As of 2019, the number of people employed by the telecommunication service providers was 3,984 (25.0 per cent) more than the number of people employed in 2018. Gamtel was the largest employer of all the service providers in the industry with 2,174 employees, followed by Qcell and Gamcel with 578 and 515 employees respectively. Africell and Comium each had 478 and 239 employees respectively.

### **4.2: ICT Contribution to Gross Domestic Product (GDP)**

Gross Domestic Product is the market value of the final products of goods and services produced in an economy in a specific time period. Thus, it is the addition of value added of various sectors such as Agriculture, Manufacturing and other service sectors such as Education, Trade, Transport and ICT.

In The Gambia the ICT industry generated a gross value added in current prices of about GMD 2.8 billion in 2019<sup>1</sup> compared to about GMD 2.5 billion in 2018. In terms of percentage contribution, the ICT sector contributed 3.4 per cent to GDP in both 2018 and 2019.

## **5: Broadcasting Media**

### **5.1: Television Stations**

There are five television stations in the country as of 2019. With GRTS being the first since 1995 while in recent years there are four additional television stations namely, QTV, Paradise TV, MTV and Star TV.

### **5.2: FM Stations: Commercial and Community Radio Stations**

There has been an increased in the number of commercial radio stations from 34 in 2018 to 40 in 2019. Similarly the number of community radio stations has increased from 8 to 9 between 2018 and 2019 respectively.

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<sup>1</sup> GDP figures for 2019 are all provisional

## 6: Herfindahl-Hirschman Index – HHI

The Herfindahl-Hirschman Index (HHI) is a common measure of market concentration. It is a measure of the size of firms in relation to the industry and an indicator of the amount of competition among the operators.

From the table below the index is above 2500 which according to the Horizontal Merger Guidelines shows a highly concentrated market. The Herfindahl-Hirschman Index for 2019 is 4376 which is more than the index for 2018. The number of operators in the market remains the same, and Africell still have the largest share of the market.

Table 1: HHI 2018 and 2019

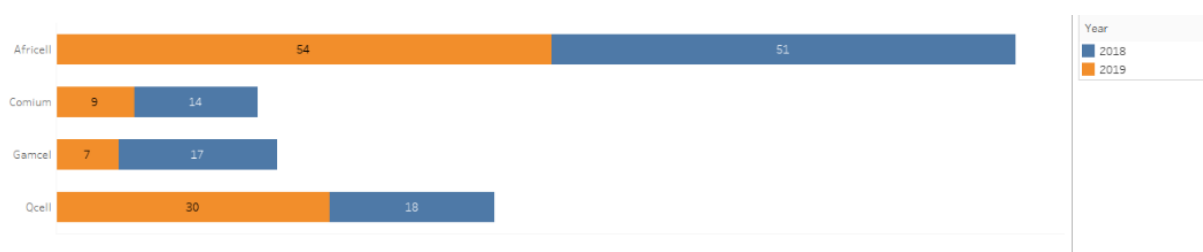
Operator	2018	2019
Gamcel	289	36
Africell	2,601	3,600
Comium	169	64
Qcell	324	676
<b>Total</b>	<b>3,383</b>	<b>4,376</b>

## 7: Market Shares

The market shares were calculated using the number of active subscribers of the GSM operators. In terms of ranking, in 2019, Africell still continues to dominate with 54.0 per cent, followed by Qcell with 30.0 per cent. The GSM operators with the least market shares are Comium and Gamcel with 9.0 per cent and 7.0 per cent respectively.

Comparing 2018 to 2019, Africell and Qcell maintain first and second positions while Comium moved from the fourth in 2018 to the third in 2019 while Gamcel moved from third to fourth position in terms of market shares in 2019 (Figure 6).

Figure 6: Market Shares of the GSM Providers



## Appendix

**Table 1: Mobile Active Subscribers**

<b>Year</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Mobile	2,548,680	2,630,247	2,898,971	3,220,038	3,181,393	2,254,714

*Source: PURA, 2019*

**Table 2: Mobile Internet Subscribers**

<b>Year</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Mobile Internet Subscribers	532,000	722,999	1,087,340	1,433,011	1,769,736	1,994,323

*Source: PURA, 2019*

**Table 3: Local Call Traffic (Minutes)**

<b>Year</b>	<b>Incoming</b>	<b>Outgoing</b>
2014	235,421,783.5	1,159,408,006
2015	268,627,316.1	1,255,396,776
2016	284,350,667.3	123,9745,098
2017	274,851,957.4	1,302,354,351
2018	261,935,094.9	1, 334,258,301.9
2019	265,672,205.71	1,395,083,503.92

*Source: PURA, 2019*

**Table 4: International Call Traffic (Minutes)**

<b>Year</b>	<b>Incoming</b>	<b>Outgoing</b>
2014	145,599,883.6	42,747,390.61
2015	123,591,776	45,229,815.47
2016	102,103,266.6	48,996,998.16
2017	72,190,764.84	39,429,891.42
2018	29,278,804.04	31,269,320.06
2019	24,527,707.53	27,322,261.93

*Source: PURA, 2019*

**Table 5: SMS Rates**

PREPAID	Gamcel	Africell	Comium	Qcell
SMS On-NET	0.44	0.55	0.55	0.4
SMS Off- Net	1.1	1.1	1.1	1.1

*Source: PURA, 2019*

**Table 6: EMPLOYEES OF THE TELECOMMUNICATION SERVICE PROVIDERS**

YEAR	Gamtel	Africell	Gamcel	Qcell	Comium	Total
<b>2015</b>	1,113	243	484	206	123	<b>2,169</b>
<b>2016</b>	1,100	295	484	250	133	<b>2,262</b>
<b>2017</b>	949	491	499	297	139	<b>2,375</b>
<b>2018</b>	1,156	493	500	561	280	<b>2,990</b>
<b>2019</b>	2,174	478	515	578	239	<b>3,984</b>

*Source: PURA, 2019*

**Table 7: Television Stations**

No.	Name	Location
1.	GRTS	Kanifing
2.	QTV	Bijilo
3.	PTV	Pipeline
4.	MTV	Serre Kunda
5.	Star TV	Serre kunda

*Source: PURA, 2019*

**Table 8: Commercial FM Radio stations**

<b>No</b>	<b>Name</b>	<b>Location</b>	<b>Frequency</b>
1.	RFI	Abuko	89.0 MHz
2.	Light FM		89.6 MHz
3.	Senn FM	West Field	90.5 MHz
4.	Deegggo FM		91.5 MHz
5.	West Coast 2	Kotu	92.1 MHz
6.	City Limit	Kairaba Avenue	93.6 MHz
7.	West Coast 1	Kotu	95.3 MHz
8.	Star FM	Ebo Town	96.6 MHz
9.	Taranga FM	Sinchu Alhagie	97.5 MHz
10.	GRTS FM	Mile 7	98.6 MHz
11.	DHK		99.5 MHz
12.	Capital FM	Kairaba Avenue	100.4 MHz
13.	Unique FM	Bakau New Town	100.7 MHz
14.	Janneh Koto FM	Gunjur	100.1 MHz
15.	Unique FM	Basse	101.7 MHz
16.	GRTS FM	GRTS Mile 7	102.6 MHz
17.	Radio 1 FM	Fajara Booster Station	102.1 MHz
18.	Kora FM	Kanifing South	103.9 MHz
19.	Hot FM	Bakau New Town	104.3 MHz
20.	Hill Top FM	Sukuta	104.7 MHz
21.	Paradise FM	Pipe Line near BSTS	105.7 MHz
22.	Paradise FM	Basse	105.8 MHz
23.	Paradise FM	Farafeni	105.5 MHz
24.	Vibes FM	Manjai	106.1 MHz
25.	Nexus	Sanchaba Junction Ba	106.4 MHz
26.	GRTS	Abuko	106.7 MHz
27.	AL FALAH FM	MDI Road kanifing	107.2 MHz
28.	Afri Radio	Kairaba Avenue	106.7 MHz
29.	Exit FM	Bakoteh	96.9 MHz
30.	Sahed Group FM	MDI Road, Kanifing	88.5 MHz
31.	Choice FM	Sanchaba Sullay Jobe	103.6 MHz
32.	SKY FM	Old Yundum	96.9 MHz
33.	Qradio	Qcity Bijilo	103.3 MHz
34.	Abraxas Talk Radio	Kerr Seringe	
35.	Taxi FM	Brusubi Phase 2	
36.	Libidorr	Brusubi Phase 2	
37.	Veritas	Latri Kunda German	
38.	Home Digital Radio	Brikama, WCR	
39.	Banjul FM	Independence Drive, Bjl.	
40.	Foroya FM	Kombo Silla Drive, Opp Fire Service Stn	

*Source: PURA, 2019*



**Table 9: Community FM Radio stations**

<b>No.</b>	<b>Name</b>	<b>Location</b>	<b>Frequency</b>
1.	Soma Community FM	Soma	88.8 MHz
2.	Bwiam Community FM	Bwiam	91.9 MHz
3.	Kerewan Community FM	Kerewan	100.5 MHz
4.	Bansang Community FM	Bansang	107.2 MHz
5.	Brikama Community FM	Brikamaba	96.8 MHz
6.	Brikama Community FM	Brikama	98.0 MHz
7.	Farafenni Community FM	Farafenni	99.9 MHz
8.	Kauranyning FM	Kuloro	107.9 MHz
9.	Poliso FM	Banjul	95.7 MHz

*Source: PURA, 2019*

**Table 20: HHI 2018 and 2019**

<b>Operator</b>	<b>2018</b>	<b>2019</b>
Gamcel	289	36
Africell	2,601	3,600
Comium	169	64
Qcell	324	676
<b>TOTAL</b>	<b>3,383</b>	<b>4,376</b>

*Source: PURA, 2019*

**Table 11: Percentage Market Shares of the GSM Providers, 2018 and 2019**

<b>OPERATORS</b>	<b>2018</b>	<b>2019</b>
Gamcel	17.4	7.0
Africell	51.0	54.0
Comium	13.5	9.0
Qcell	18.1	30.0
<b>Grand Total</b>	<b>100.0</b>	<b>100.0</b>

*Source: PURA, 2019*