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LIST OF ABBREVIATIONS

BWA.	Broadband Wireless Access
LTE	Long-Term Evolution
FM	Frequency Modulation
GB	Gigabytes
GH¢	Ghana Cedi
GHp	Ghana pesewas
MB	Megabytes
MNO	Mobile Network Operator
MoU	Minutes of Use
NCA	National Communications Authority
SMS	Short Message Service
TV	Television
TB	Terabytes

VISION AND MISSION

Vision

A world-class communications regulator that facilitates innovative, reliable and sustainable communication solutions to meet stakeholders' expectations.

Mission

Moving from Good to a Great Regulator; An innovative, agile, professional, and proactive Regulator, adaptive to emerging changes in the communication and digital ecosystem and delivering optimally to all stakeholders.

Core Values

- Teamwork
- Accountability
- Consistency
- Trust
- Innovation
- Transparency

Tag Line/Slogan – Communications for Development

INTRODUCTION

The Quarterly Statistical Bulletin on Communications serves as an authoritative reference document presenting disaggregated data, industry trends, and analytical insights into Ghana's communications sector. The primary objective of this publication is to facilitate transparent, informed, and constructive public discourse on sectoral policies among telecommunications analysts, consumers, academia, policymakers, investors; and other stakeholders, thereby supporting evidence-based decision-making.

This bulletin is compiled from monthly data submissions provided by licensed operators and authorisation holders.

*The publication of this bulletin is in fulfillment of the National Communications Authority's statutory mandate under Section 26(2)(a) of the **Electronic Communications Act, 2008 (Act 775)**, which enjoins the Authority "to publish the results of research that it carries out or that is carried out on its behalf on its website and in any other manner that it considers appropriate to bring such results to the attention of the public."*

DEFINITION OF TERMS

Average SMS per subscription - This metric is determined by dividing the total SMS count (On-Net and Off-Net) for the quarter by the total average number of mobile subscriptions for that quarter.

Broadband Wireless Access (BWA) - Refers to mobile data subscriptions connected to high-speed internet access via fixed wireless technologies (LTE) that generated internet traffic (uploaded and / or downloaded data) in the last ninety (90) days.

BWA Data Usage per Subscription - This is calculated by dividing the BWA's total traffic for the quarter by its total average subscriptions for that quarter.

Cellular network or mobile network - refers to a communication network where the last mile connection is wireless. The network is distributed over land areas called cells, each served by at least one fixed-location transceiver, known as a cell site or base station. This base station provides the cell with network coverage, which can be used for the transmission of voice, data, and others.

Fixed Voice Subscriptions - This refers to the number of active public fixed telephony access lines provided at a fixed location, enabling two-way voice communication over PSTN, ISDN, fixed wireless, or fixed.

Fixed-Broadband Subscriptions - refers to fixed subscriptions to high-speed access to the public Internet (a TCP / IP connection), at downstream speeds equal to, or greater than 256Kbits/s. This includes cable modem, DSL, fibre-to-the home/building, other fixed (wired)-broadband subscriptions, satellite broadband and terrestrial fixed wireless broadband.

Fibre Broadband Subscriptions - refers to active fixed Internet subscriptions provided to end users using fibre-optic access technologies (FTTH, FTTB, FTTP or FTTO), with downstream speeds equal to or greater than 256Kbit/s.

Satellite Broadband Subscriptions - refers to the number of satellite Internet subscriptions with an advertised download speed of at least 256 kbit/s. It refers to the retail subscription technology and not to the backbone technology.

Minutes of Use per Subscription - It is calculated by dividing the total voice traffic in minutes for the quarter by the total average subscriptions for that quarter.

Machine-to-Machine Subscriptions - Refers to the number of mobile-cellular machine-to-machine subscriptions assigned for data exchange between devices (cars, smart meters, consumer electronics) that are not part of a personal (human) subscription.

Basic Phones - Refers to a voice-centric mobile device with limited data functionality, typically operating on 2G/3G networks and lacking sophisticated OS or app ecosystem. It primarily supports voice calls and SMS

Feature Phones - A class of mobile phones that support limited multimedia functions (camera, FM Radio, MMS) and may have basic limited internet access (WAP, GPRS) but not full web browsing. Such phones often use a proprietary OS.

Smartphones - A class of mobile phones with powerful computing capability, heterogeneous connectivity and advanced operating system providing a platform for third-party applications

Mobile Voice Subscriptions – Refers to the number of active mobile voice subscriptions on mobile networks that generated voice traffic (outgoing and / or incoming calls) in the last ninety (90) days.

Mobile Data Subscriptions - refers to active mobile data subscriptions to GPRS, EDGE, UMTS and LTE that have generated internet traffic (uploaded and / or downloaded data) within the last ninety (90) days.

Mobile Data Usage per Subscription - It is calculated by dividing the total volume of data traffic for the quarter by the total average mobile data subscriptions for that quarter.

Mobile Penetration or Teledensity – This represents the total number of mobile subscriptions per 100 inhabitants in a geographical area.

Net Addition – It refers to the difference between mobile voice/data subscriptions added to the network and mobile voice/data subscriptions churned from the network during the month.

On-Net traffic - refers to telecommunications traffic (calls, SMS) that originates and terminates on the same network operated by the same service provider.

Off-Net traffic – refers to telecommunications traffic (calls, SMS) that originates on one network and terminates on a different network operated by another service provider, requiring interconnection between the two networks

In-Bound Roaming Traffic- refers to the traffic generated by subscribers of foreign mobile networks while they are temporarily located within a country and using the services of a visited mobile network in that country.

Out-Bound Roaming Traffic- refers to the traffic generated by subscribers of a domestic mobile network while they are temporarily located outside their home country and using the services of a foreign (visited) mobile network

In-bound Roaming Incoming –refers to incoming traffic (calls, SMS, or data sessions) received by roaming subscribers of foreign mobile networks while they are temporarily located in a country and served by a visited domestic mobile network.

In-bound Roaming Outgoing- refers to outgoing traffic (calls, SMS, or data usage) originated by roaming subscribers of foreign mobile networks while they are temporarily located in a country and using the services of a visited domestic mobile network.

Quarter-on-Quarter – This is a comparison of the quarter under review with the preceding quarter.

Q1 – First Quarter (January – March)

Q2 – Second Quarter (April – June)

Q3 – Third Quarter (July – September)

Q4 – Fourth Quarter (October – December)

Year-on-Year – This compares the current period (month, quarter etc.) to the same period last year.

THE COMMUNICATIONS INDUSTRY AT A GLANCE¹

Indicator/Period		Q4 2025 (Oct – Dec)	Q1 2026 (Jan – Mar)	Quarterly Variation (%)
MOBILE NETWORK SERVICES				
Subscription to Mobile Voice Services	Total Mobile Voice Subscriptions	42,871,955	43,500,269	1.47%
	Machine-to-Machine (M2M) Subscriptions	3,542,055	3,641,157	2.80%
Mobile Data Subscriptions	Total Mobile Data Subscriptions	28,698,390	29,727,471	3.59%
Mobile Data Traffic	Total Mobile Data Traffic (TB)	1,101,301	1,250,099	13.51%
Mobile Phone Devices	Basic Phones	9,150,523	11,779,679	28.73%
	Feature Phones	10,585,002	5,146,916	-51.38%
	Smartphones	26,873,338	27,366,508	1.84%
DOMESTIC MOBILE TRAFFIC				
Domestic Mobile Voice Traffic (Minutes)	On-Net Voice Traffic	27,216,445,349	28,037,953,212	3.02%
	Off-Net Voice Traffic	2,939,422,050	3,149,608,737	7.15%
	Mobile to Mobile Off-Net Traffic	3,212,140,964	3,138,140,521	-2.30%
	Mobile to Fixed Off-Net Traffic	12,221,485	11,468,216	-6.16%
Domestic Mobile SMS Traffic	SMS On-Net	2,871,511,540	3,081,650,562	7.32%
	SMS Off-Net	799,707,735	862,081,189	7.80%
INTERNATIONAL MOBILE TRAFFIC				
International Mobile Voice Traffic (Minutes)	International Incoming Mobile Voice Traffic	34,401,459	29,121,221	-15.35%
	International Outgoing Mobile Voice Traffic	76,532,386	90,126,202	17.76%
International SMS Traffic	International Incoming SMS	91,506,448	84,172,618	-8.01%
	International Outgoing SMS	51,960,923	57,303,794	10.28%
ROAMING TRAFFIC				
Out-bound Roaming Traffic	Out-Bound Roaming Voice Traffic (Minutes)	1,952,819	1,783,634	-8.66%
In-Bound Roaming Traffic	In-Bound Roaming Incoming Voice Traffic (Minutes)	3,574	3,620	1.29%
	In-Bound Roaming Outgoing Voice Traffic (Minutes)	24,797,850	24,218,212	-2.34%
	In-Bound Roaming Incoming SMS	182,054,705	171,484,140	-5.81%
	In-Bound Roaming Outgoing SMS	7,805,739	7,759,809	-0.59%

² The decimals may not be exact due to the rounding-off of the actual figures.

Indicator/Period		Q4 2025 (Oct - Dec)	Q1 2026 (Jan - Mar)	Quarterly Variation (%)
FIXED NETWORK SERVICES				
Fixed Voice Subscriptions	Total Fixed Line Subscriptions	265,236	262,221	-1.14%
Domestic Fixed Voice Traffic (Minutes)	Fixed-to-Mobile	6,041,489	7,221,840	19.54%
Fixed Data and Broadband Subscriptions and Traffic	Total Fixed Line Data Subscriptions	175,458	189,091	7.77%
	Fixed Broadband Subscriptions	261,938	273,095	4.26%
	Fixed Broadband Traffic (TB)	130,209	124,961	-4.03%
BROADCASTING SERVICES				
Authorised TV Stations		178	178	0.00%
Operational TV Stations		132	132	0.00%
Licensed FM Stations		784	787	0.38%
Operational FM Stations		563	563	0.00%
CATEGORIES OF AUTHORISED FM STATIONS				
Commercial FM Stations		565	569	0.71%
Public FM Stations		31	31	0.00%
Public (Foreign) FM Stations		5	4	-20.00%
Community FM Stations		159	159	0.00%
Campus FM Stations		24	24	0.00%
BROADBAND WIRELESS ACCESS SERVICES (BWAs)				
Broadband Wireless Access Subscriptions		1,454	1,454	0.00%
Broadband Wireless Access Data Traffic (TB)		110.05	69.04	-37.26%
PENETRATION POINTS				
Mobile Voice Subscriptions		127.03	128.26	1.23
Mobile Data Subscriptions		85.03	87.65	2.62
Fixed Voice Subscriptions		0.79	0.77	-0.02
Fixed Data Subscriptions		0.52	0.60	0.08
Broadband Wireless Access (BWA) Subscriptions		0.004	0.004	0.00

1.0 MOBILE NETWORK

There are three (3) Mobile Network Operators (MNOs) in Ghana namely AT, MTN and Telecel. This section focuses on data for the period January - March 2026.

This section provides details on the performance of the MNOs in Ghana by focusing on Mobile Voice and Mobile Data Subscriptions, Net Additions to Mobile Voice and Mobile Data Subscriptions, Mobile Voice and Mobile Data Penetration Rates, Volumes of Mobile Voice and Mobile Data Traffic, Average Revenue per User and Short Message Services.

1.1 Mobile Voice Subscriptions and Penetration Rate²

Mobile voice subscriptions recorded a quarter-on-quarter increase of 1.47%, rising from 42.87 million in Q4 2025 to 43.50 million in Q1 2026, indicating continued expansion, albeit at a moderate pace.

On a year-on-year basis, subscriptions grew by 8.83%, from 39.97 million in Q1 2025 to 43.50 million in Q1 2026, reflecting sustained market growth over the 12-month period.

The penetration rate reached 128.26% at the end of Q1 2026, up from 127.03% in Q4 2025, representing a 1.23 percentage point increase. (Figure 1; Table 1)

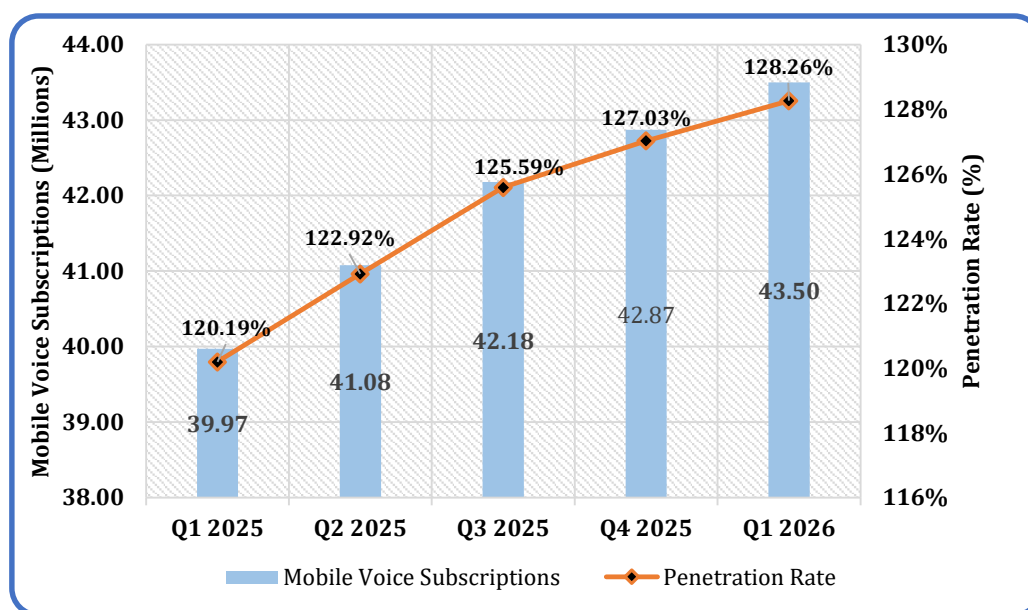


Figure 1: Mobile Voice Subscription and Penetration Rate

Table 1: Mobile Voice Subscriptions and Penetration Rate

Subscription	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Mobile Subscription	39,970,301	41,078,883	42,179,045	42,871,955	43,500,269
Mobile Subscription Growth Rate	4.07%	2.77%	2.68%	1.64%	1.47%
Net Additions	1,561,589	1,108,582	1,100,162	692,910	628,314
Population	33,254,867	33,419,924	33,584,980	33,750,036	33,915,092
Penetration Rate	120.19%	122.92%	125.59%	127.03%	128.26%

² The mobile penetration rate is estimated by dividing the total number of mobile subscribers by the total population.

1.1.1 Mobile Voice Subscriptions and Market Share per Operator

The market structure at the end of Q1 2026 remained highly stable, with MTN retaining a leading position. MTN accounted for 71.85% of total subscriptions, equivalent to 31.26 million, reinforcing its clear lead in the mobile voice segment.

Telecel maintained its position as the second-largest operator, with 9.13 million subscriptions, representing a 20.99% market share. While significantly behind the market leader, it continues to hold a stable share of the subscriber base.

AT recorded 3.12 million subscriptions, translating to a 7.16% market share, indicating a comparatively smaller footprint within the market.

Overall, the distribution highlights a skewed competitive landscape, with limited shifts in operator positioning during the period under review. (Figure 2; Table 2).

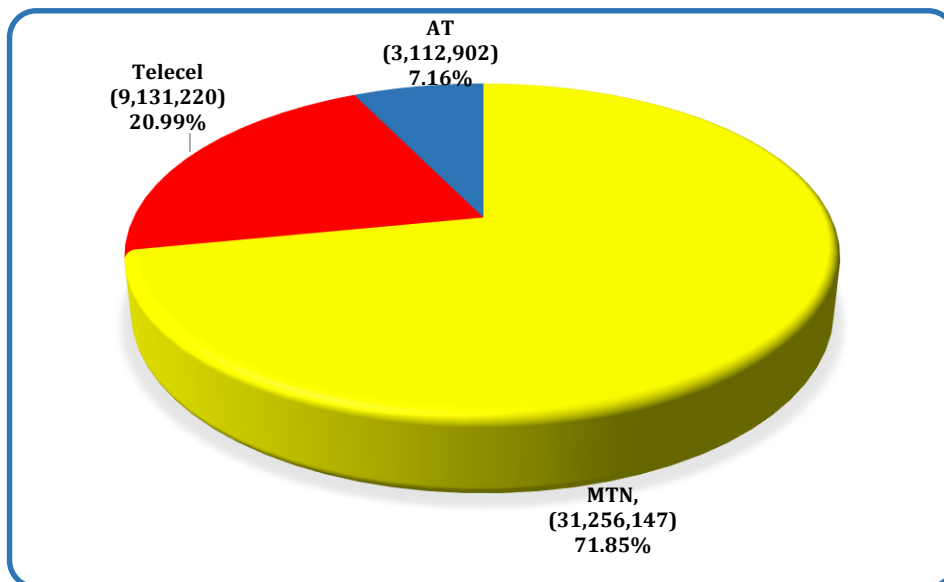


Figure 2: Market Share per Operator

1.1.2 Quarter-on-Quarter Market Share per Operator in Percentage

Quarter-on-quarter movements in market share indicate a slight rebalancing among operators. MTN remained the market leader with a share of 71.85% in Q1 2026; however, its market share declined by 1.07 percentage points from 72.92% recorded in Q4 2025.

In contrast, Telecel recorded a 0.82 percentage point increase, rising from 20.17% to 20.99%, reflecting gradual gains in subscriptions growth. Similarly, AT expanded its share by 0.25 percentage points, from 6.91% to 7.16%, indicating incremental growth from a smaller base.

Overall, the changes point to limited but noticeable competitive shifts, with both Telecel and AT capturing marginal gains largely at the expense of MTN, though the overall market structure remains largely unchanged.

Table 2: Mobile Voice Subscriptions and Market Share per Operator

Mobile Network Operator		Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
MTN	Subscriptions	29,521,441	30,264,594	30,895,974	31,260,304	31,256,147
	Market Share (%)	73.86%	73.67%	73.25%	72.92%	71.85%
Telecel	Subscriptions	7,296,855	7,628,251	8,121,543	8,648,431	9,131,220
	Market Share (%)	18.26%	18.57%	19.25%	20.17%	20.99%
AT	Subscriptions	3,152,005	3,186,038	3,161,528	2,963,220	3,112,902
	Market Share(%)	7.89%	7.76%	7.50%	6.91%	7.16%
Total Industry Subscription		39,970,301	41,078,883	42,179,045	42,871,955	43,500,269

1.1.3 Prepaid and Postpaid Mobile Voice Subscriptions

The composition of mobile voice subscriptions at the end of Q1 2026 remained overwhelmingly skewed towards prepaid services. Prepaid subscriptions reached 42.99 million, accounting for 98.83% of the total subscriber base, while postpaid subscriptions stood at 0.51 million, representing 1.17% of the market. (Figure 3; Table 3)

On a quarter-on-quarter basis, prepaid subscriptions increased by 1.45%, rising from 42.38 million in Q4 2025 to 42.99 million in Q1 2026. Postpaid subscriptions also recorded growth of 2.72%, moving from 0.497 million to 0.510 million over the same period.

Despite the relatively higher growth rate observed in the postpaid segment, its overall contribution remains marginal. The data therefore highlights the structural dominance of prepaid services, with growth in the market continuing to be driven primarily by prepaid adoption rather than a shift towards postpaid offerings. (Figure 3; Table 3)

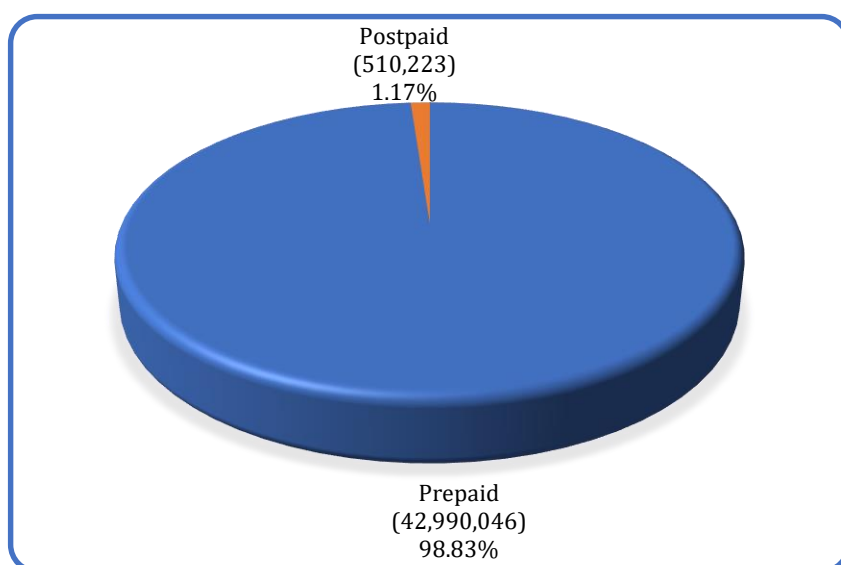


Figure 3: Prepaid and Postpaid Mobile Voice Subscriptions

Table 3: Prepaid and Postpaid Voice Subscriptions and Market Share

Subscription	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Prepaid	39,521,042	40,574,076	41,679,141	42,375,251	42,990,046
Market Share	98.88%	98.77%	98.81%	98.84%	98.83%
Postpaid	449,259	504,807	499,904	496,704	510,223
Market Share	1.12%	1.23%	1.19%	1.16%	1.17%
Total mobile subscription	39,970,301	41,078,883	42,179,045	42,871,955	43,500,269

1.2 Domestic Voice Traffic

1.2.1 On-Net Domestic Mobile Voice Traffic

On-net domestic mobile voice traffic recorded a 3.02% quarter-on-quarter increase, rising from 27.22 billion minutes in Q4 2025 to 28.04 billion minutes in Q1 2026, indicating sustained growth in within-network call activity.

On a year-on-year basis, traffic expanded by 5.70%, from 26.53 billion minutes to 28.04 billion minutes, reflecting continued, albeit moderate, growth in usage volumes. (Figure 4; Table 4)

Overall, the trend suggests steady and consistent utilisation of on-net services, likely supported by on-network call incentives that continue to encourage intra-network communication.

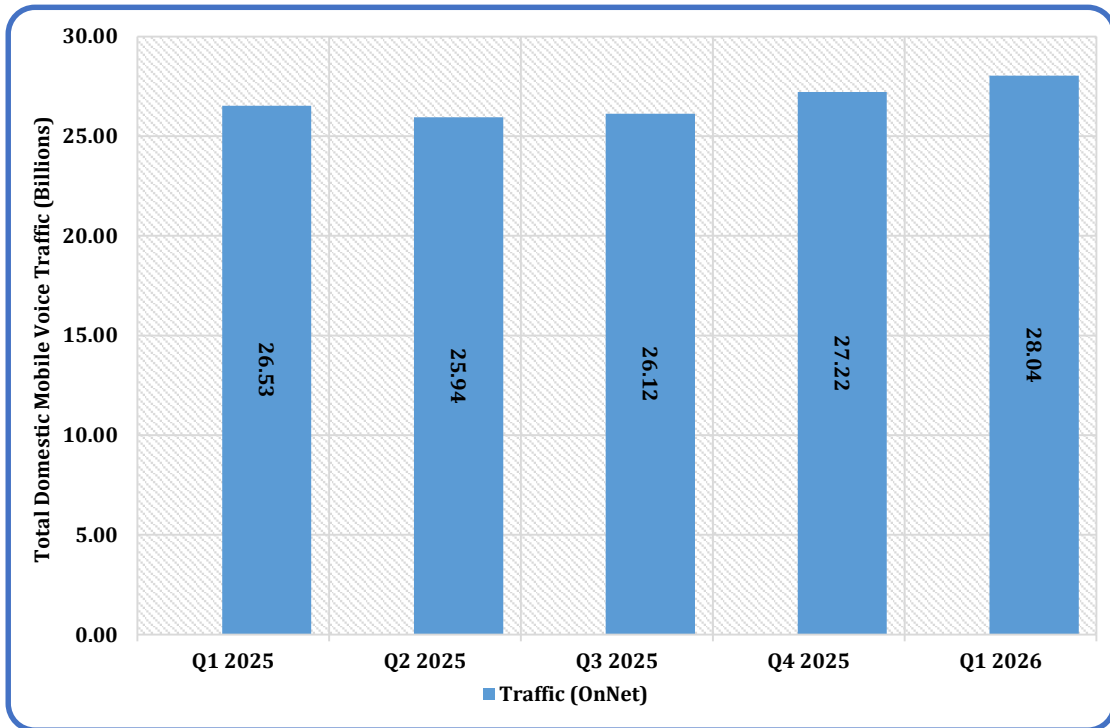


Figure 4: On-Net Domestic Mobile Voice Traffic

Table 4: On-Net Voice Traffic in Minutes

Traffic	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Traffic (OnNet)	26,526,119,974	25,943,641,908	26,122,036,725	27,216,445,349	28,037,953,212
Q-o-Q (Traffic-OnNet)	-1.80%	-2.20%	0.69%	4.19%	3.02%
Y-o-Y (Traffic-OnNet)	4.18%	0.15%	0.81%	0.76%	5.70%

1.2.2 Off-Net Domestic Voice Traffic

Mobile-to-Mobile Off-Net traffic recorded a contraction in the first quarter of 2026, declining from 3.21 billion minutes in Q4 2025 to 3.14 billion minutes, representing a 2.30% quarter-on-quarter decrease. This moderation suggests a minor decline in cross-network calling volumes over the review period.

However, on a year-on-year basis, Off-Net mobile-to-mobile traffic expanded significantly by 27.76%, increasing from 2.46 billion minutes in Q1 2025 to 3.14 billion minutes in Q1 2026. This indicates sustained growth in inter-network communication despite the short-term quarterly decline.

Similarly, mobile-to-fixed off-net traffic decreased on a quarter-on-quarter basis by 6.16%, falling from 0.012 billion minutes in Q4 2025 to 0.011 billion minutes in Q1 2026, pointing to a continued weakening in fixed-line call demand.

In contrast, year-on-year mobile-to-fixed off-net traffic grew by 5.67%, rising from 0.0108 billion minutes in Q1 2025 to 0.0115 billion minutes in Q1 2026, suggesting a modest recovery relative to the same period last year.

Overall, total off-net domestic mobile voice traffic declined marginally by 2.32% quarter-on-quarter, from 3.22 billion minutes in Q4 2025 to 3.15 billion minutes in Q1 2026. This slight downturn reflects short-term changes in usage patterns.

Nevertheless, on a year-on-year basis, total off-net traffic increased markedly by 27.67%, from 2.47 billion minutes in Q1 2025 to 3.15 billion minutes in Q1 2026, reinforcing the broader upward trajectory in cross-network voice traffic. (Figure 5; Table 5)

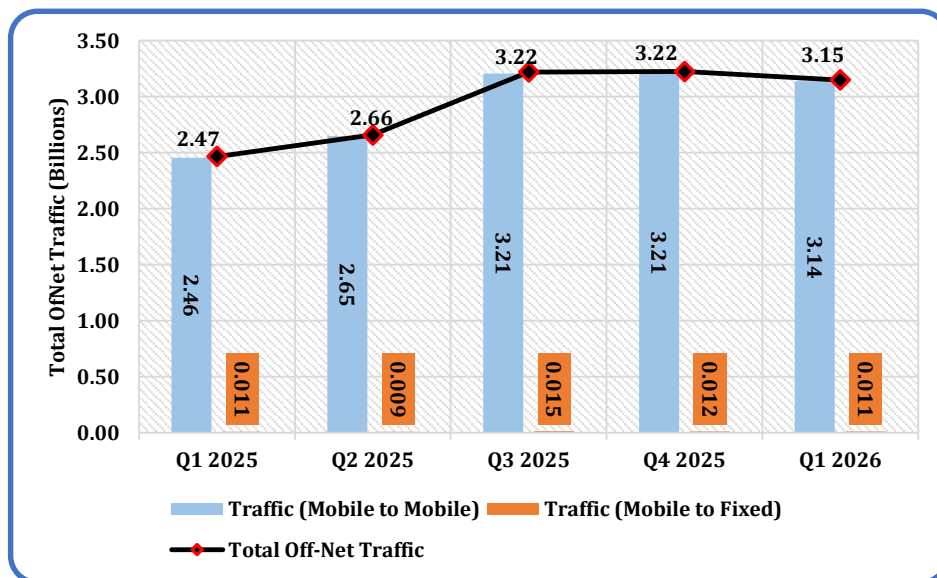


Figure 5: Off-Net Traffic Distribution between Mobile and Fixed Networks

Table 5: Total Off-Net Domestic Mobile Voice Traffic in Minutes

Breakdown of Off-Net Traffic	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Traffic (Mobile to Mobile)	2,456,182,273	2,649,268,014	3,205,714,502	3,212,140,964	3,138,140,521
Share (%)	99.56%	99.65%	99.53%	99.62%	99.64%
Growth (%)	4.87%	7.86%	21.00%	0.20%	-2.30%
Traffic (Mobile to Fixed)	10,852,564	9,346,327	15,120,729	12,221,485	11,468,216
Share (%)	0.44%	0.35%	0.47%	0.38%	0.36%
Growth (%)	-4.16%	-13.88%	61.78%	-19.17%	-6.16%
Total Off-Net Traffic	2,467,034,837	2,658,614,341	3,220,835,231	3,224,362,449	3,149,608,737

1.2.3 Total Domestic Mobile Voice Traffic

Total domestic mobile voice traffic recorded a moderate increase of 2.45% in the first quarter of 2026, rising from 30.44 billion minutes in Q4 2025 to 31.19 billion minutes. This growth indicates a marginal uptake in overall voice usage during the review period.

On a year-on-year basis, total domestic mobile voice traffic expanded from 28.99 billion minutes in Q1 2025 to 31.19 billion minutes in Q1 2026. While the reported growth rate mirrors the quarter-on-quarter trend, the absolute increase suggests a sustained expansion in voice traffic volumes over the past year.

Overall, the observed growth trajectory points to continued reliance on mobile voice services, albeit at a relatively stable and incremental pace, reflecting maturity in the domestic voice market.

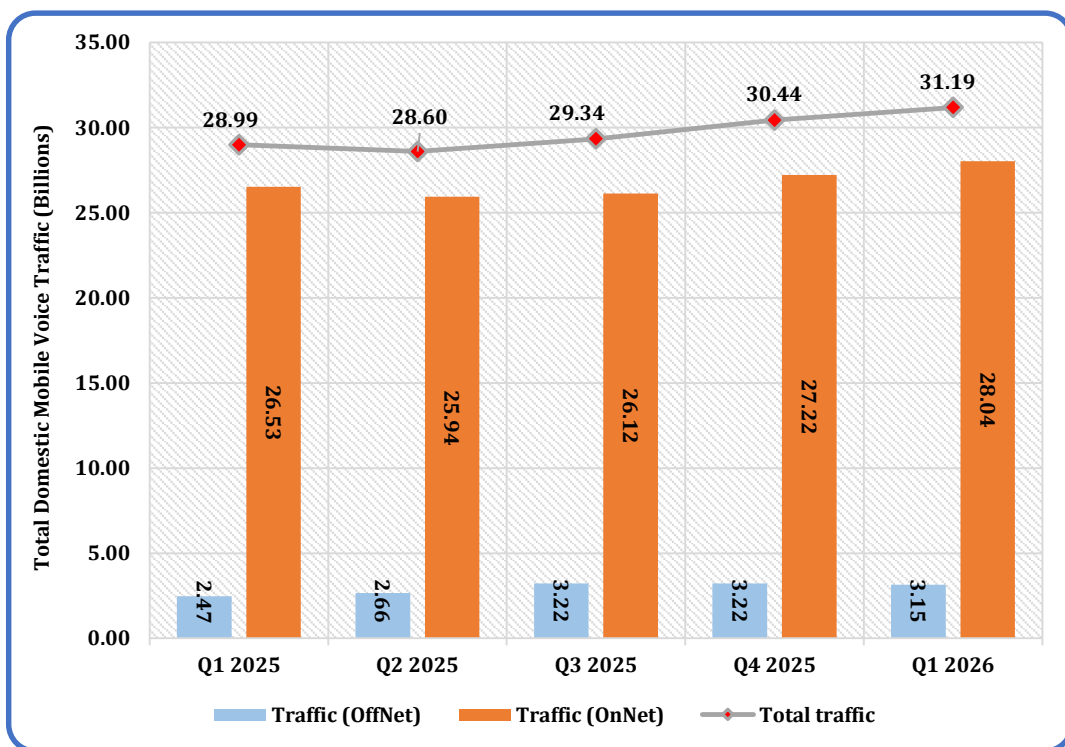


Figure 6: Total Domestic Mobile Voice Traffic in Billions of Minutes

1.2.4 Total Domestic Mobile Voice Traffic per Operator

At the end of Q1 2026, MTN maintained a leading position in mobile voice traffic, recording 28.69 billion minutes and accounting for 92.00% of total traffic. This substantial lead highlights the operator’s scale advantage and its strong subscriber base.

Telecel ranked a distant second, generating 2.18 billion minutes and capturing 6.99% of total voice traffic, while AT recorded the lowest volume at 0.31 billion minutes, representing a marginal share of 1.01%.

The distribution of traffic across operators remains highly concentrated, with MTN continuing to exert significant influence over voice traffic generation in the market, as reflected in Figure 7, Table 6.

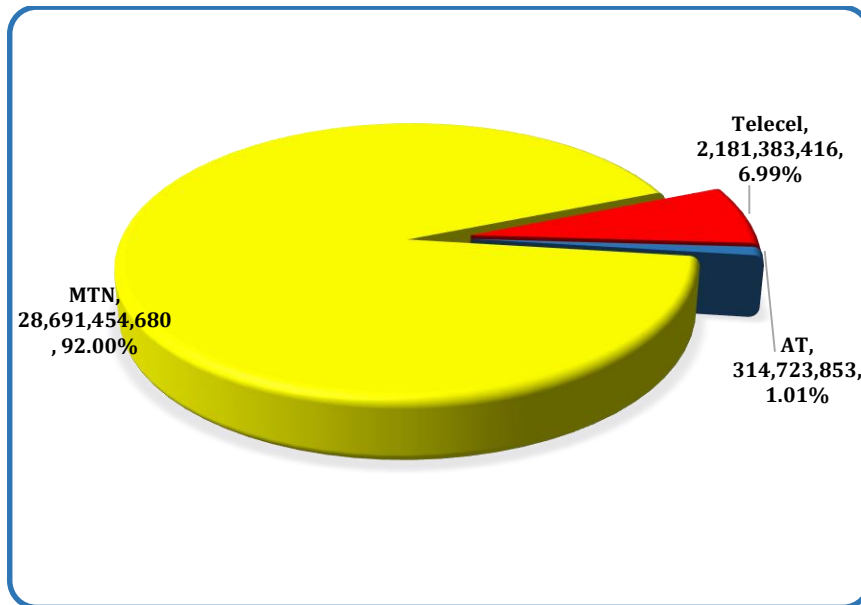


Figure 7: Total Domestic Mobile Voice Traffic per Operator

Table 6: Total Domestic Mobile Voice Traffic per MNOs

Mobile Network Operator		Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
MTN	Traffic	27,084,292,538	26,525,831,998	26,771,114,196	27,877,280,552	28,691,454,680
	Market Share	93.42%	92.74%	91.24%	91.58%	92.00%
Telecel	Traffic	1,831,161,419	1,994,255,302	2,165,274,782	2,221,137,824	2,181,383,416
	Market Share	6.32%	6.97%	7.38%	7.30%	6.99%
AT	traffic	77,700,854	82,168,949	406,482,978	342,593,101	314,723,853
	Market Share	0.27%	0.29%	1.39%	1.13%	1.01%
Total Industry Traffic		28,993,154,811	28,602,256,249	29,342,871,956	30,441,011,477	31,187,561,949

1.2.5 International Traffic

Inbound international traffic contracted notably in Q1 2026, declining by 15.35% from 34.40 million minutes in Q4 2025 to 29.12 million minutes. This indicates a reduction in incoming international call volumes over the review period.

On a year-on-year basis, the decline was more pronounced, with inbound traffic falling by 29.54% from 41.33 million minutes in Q1 2025 to 29.12 million minutes in Q1 2026. This sustained drop points to a weakening trend in inbound international voice flows.

In contrast, outbound international traffic recorded a strong quarter-on-quarter rebound, increasing by 17.76% from 76.53 million minutes in Q4 2025 to 90.13 million minutes in Q1 2026. This suggests a recovery in outbound calling activity during the quarter.

However, on an annual basis, outbound traffic declined by 13.55%, down from 104.25 million minutes in Q1 2025 to 90.13 million minutes in Q1 2026, indicating that the recent quarterly growth has not yet offset the broader downward trend as shown in figure 8, Table 7

Overall, the divergent trends—declining inbound traffic alongside a short-term recovery in outbound volumes—highlight shifting dynamics in international voice usage, with outbound traffic showing signs of partial recovery but remaining below prior-year levels.

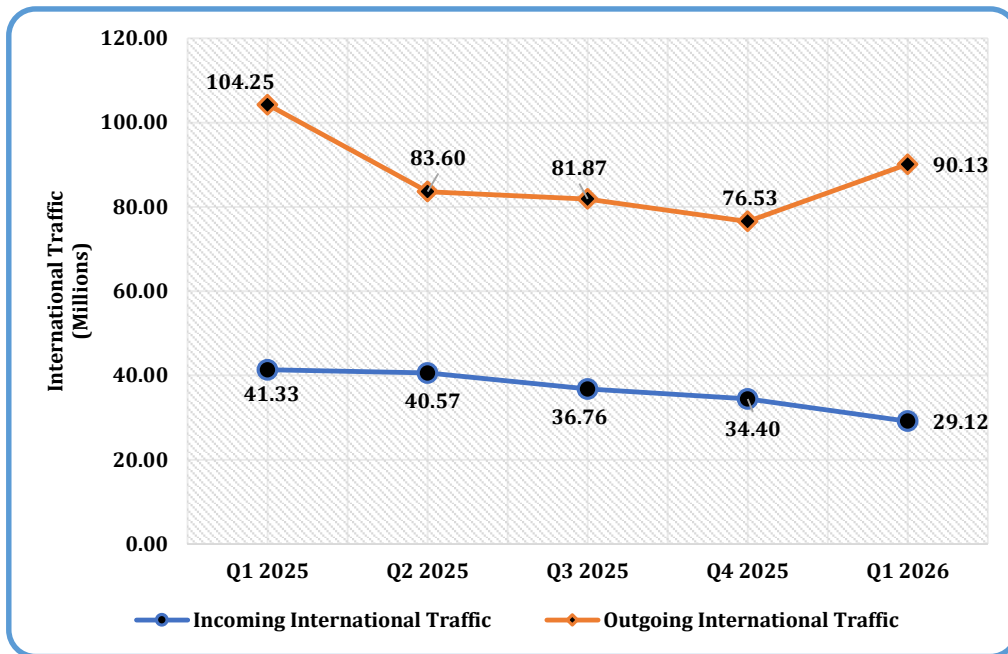


Figure 8: International Traffic in Millions of Minutes

Table 7: International Mobile Voice Traffic

Traffic Type	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Incoming Mobile Voice International Traffic	41,329,257	40,574,561	36,763,322	34,401,459	29,121,221
Growth Rate	-0.29%	-1.83%	-9.39%	-6.42%	-15.35%
Outgoing Mobile Voice International Traffic	104,246,439	83,599,789	81,869,771	76,532,386	90,126,202
Growth Rate	66.33%	-19.81%	-2.07%	-6.52%	17.76%

1.2.6 Minutes of Use (MoU)

Average minutes of use (MoU) per subscription recorded a marginal increase on a quarter-on-quarter basis, rising from 716.53 minutes in Q4 2025 to 718.76 minutes in Q1 2026, representing a modest growth of 0.31%. This indicates a slight uptake in voice usage intensity during the review period.

In contrast, a year-on-year comparison shows a decline in MoU, with average usage falling from 733.02 minutes in Q1 2025 to 718.76 minutes in Q1 2026, reflecting a marginal reduction of 1.95%. This suggests that, despite short-term stability, overall voice consumption per subscriber has moderated over time, depicted in Figure 9; Table 8.

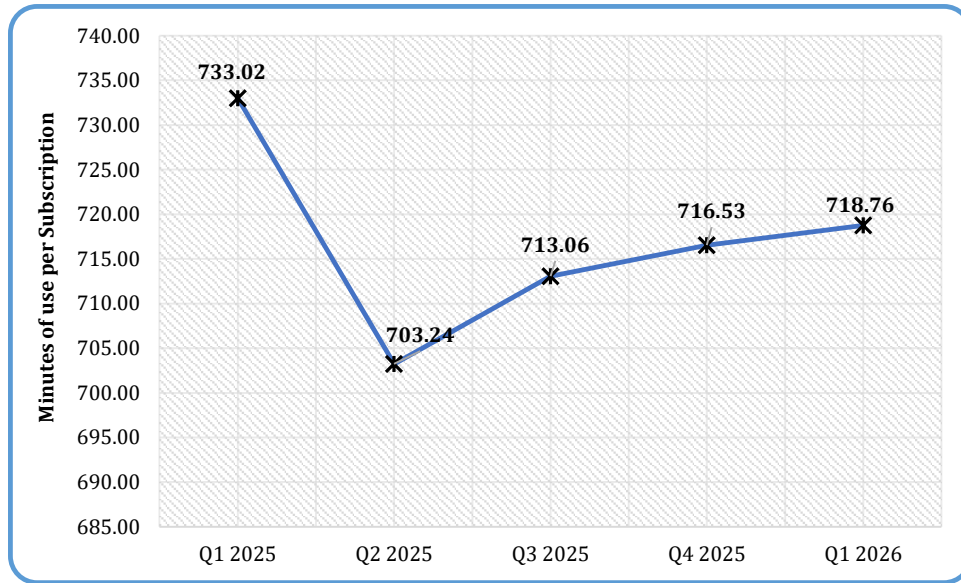


Figure 9: Mobile Voice Minutes of Use (MoU) per subscription

Table 8: Mobile Voice Traffic Minutes of Use (MoU) per Subscriptions

Traffic	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Total mobile voice traffic (Domestic)	28,993,154,811	28,602,256,249	29,342,871,956	30,441,011,477	31,187,561,949
Outgoing International Traffic	104,246,439	83,599,789	81,869,771	76,532,386	90,126,202
Total Mobile Voice Traffic (Dom. & Int.)	29,097,401,250	28,685,856,038	29,424,741,727	30,517,543,863	31,277,688,151
Average Mobile voice subscription	39,695,383	40,791,195	41,265,451	42,590,561	43,516,290
Minutes of Use (MoU) per Subscription	733.02	703.24	713.06	716.53	718.76
MoU Q-o-Q growth rate	-3.46%	-4.06%	1.40%	0.49%	0.31%

1.3 Short Message Services (SMS)

Total SMS volumes recorded a notable increase in Q1 2026, rising to 3.94 billion messages from 3.67 billion in Q4 2025, representing a quarter-on-quarter growth of 7.42%. This indicates a rebound in messaging activity during the review period.

On a year-on-year basis, SMS traffic more than doubled, increasing from 1.80 billion messages in Q1 2025 to 3.94 billion messages in Q1 2026, reflecting a substantial growth rate of 118.87%.

The strong annual expansion suggests a significant resurgence in SMS usage, potentially driven by increased promotional messaging, service notifications, and enterprise-driven communications, despite broader shifts toward data-based messaging platforms. (Figure 10; Table 9).

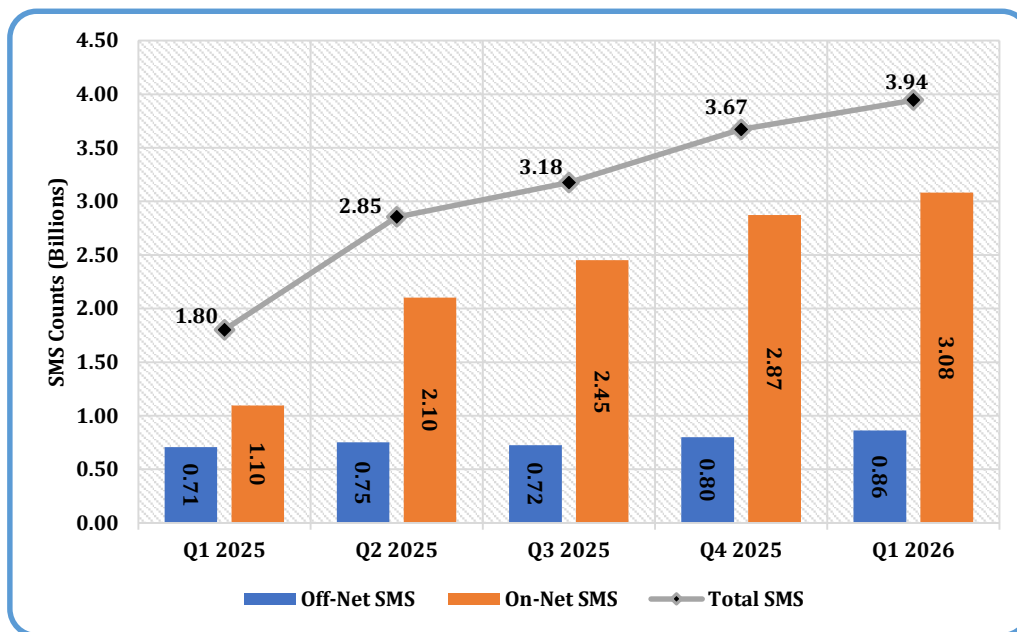


Figure 10: Total Number of SMS in Billions

Table 9: Total Number of Short Messages Services

SMS	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Off-Net SMS	705,902,360	751,314,479	724,652,417	799,707,735	862,081,189
On-Net SMS	1,095,930,867	2,102,646,295	2,450,423,603	2,871,511,540	3,081,650,562
Total SMS	1,801,833,227	2,853,960,774	3,175,076,020	3,671,219,275	3,943,731,751

1.3.1 SMS Counts per Operator

At the end of Q1 2026, MTN dominated SMS traffic, recording 3.12 billion messages and accounting for 79.16% of total SMS volumes. This reinforces its leading position in the messaging segment.

Telecel ranked second with 0.82 billion messages, representing a market share of 20.68%, while AT contributed 0.006 billion messages, corresponding to just 0.16% of total SMS traffic.

Overall, SMS activity remains highly concentrated, with MTN capturing a substantial majority of the market. This concentration aligns with its subscriber scale and network reach, indicating limited competitive intensity in the SMS segment. (Figure 11; Table 10)

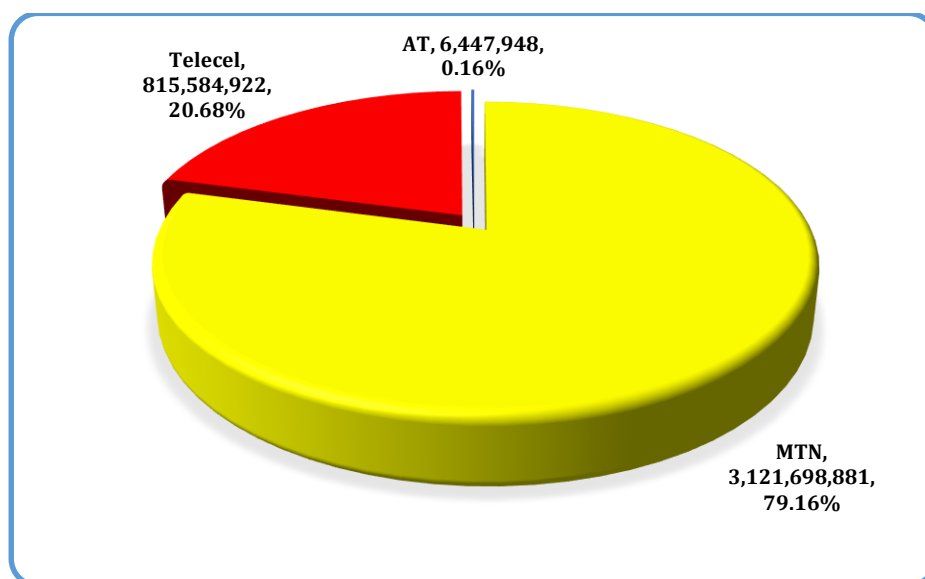


Figure 11: SMS Counts Market Share per Operator

Table 10: Total Number of SMS per Mobile Network Operator

Mobile Operators	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Off-Net					
MTN	196,605,890	262,715,059	198,235,943	317,586,977	319,497,021
Telecel	496,971,653	474,197,149	513,453,157	476,394,455	536,559,064
AT	12,324,817	14,402,271	12,963,317	5,726,303	6,025,104
Total	705,902,360	751,314,479	724,652,417	799,707,735	862,081,189
On-Net					
MTN	870,788,155	1,859,365,347	2,193,791,830	2,606,563,777	2,802,201,860
Telecel	224,192,932	242,153,362	255,605,746	264,588,470	279,025,858
AT	949,780	1,127,586	1,026,027	359,293	422,844
Total	1,095,930,867	2,102,646,295	2,450,423,603	2,871,511,540	3,081,650,562
Total					
MTN	1,067,394,045	2,122,080,406	2,392,027,773	2,924,150,754	3,121,698,881
Telecel	721,164,585	716,350,511	769,058,903	740,982,925	815,584,922
AT	13,274,597	15,529,857	13,989,344	6,085,596	6,447,948
Total	1,801,833,227	2,853,960,774	3,175,076,020	3,671,219,275	3,943,731,751

1.3.2 SMS per Subscription

On a quarter-on-quarter basis, the average number of SMS messages sent per subscription increased from 86 in Q4 2025 to 91 in Q1 2026, representing a growth rate of 12.03%.

This upward movement indicates a strengthening in per-user messaging activity during the review period, suggesting increased utilisation of SMS services. (Figure 12; Table 11).

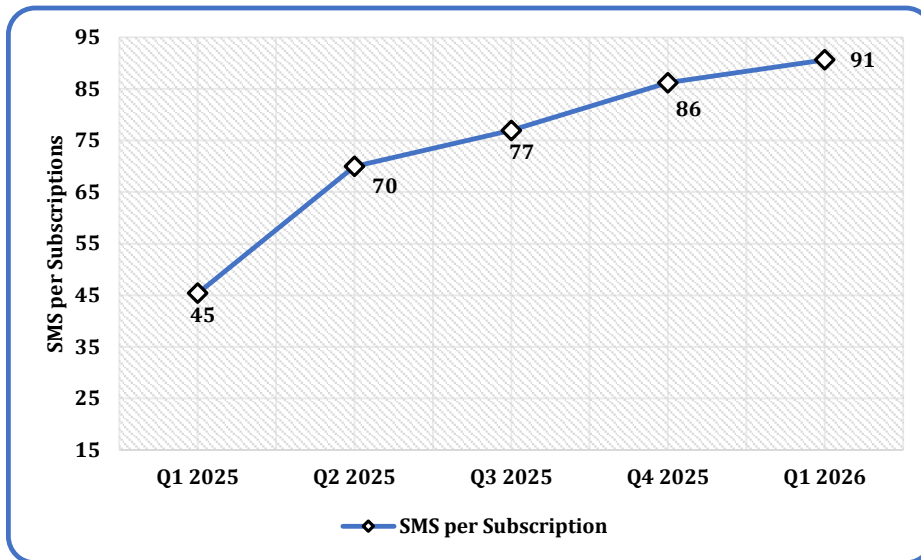


Figure 12: SMS per Subscription

Table 11: Average SMS per Subscription

SMS Subscriptions	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Total SMS	1,801,833,227	2,853,960,774	3,175,076,020	3,671,219,275	3,943,731,751
Average Mobile Subscription	39,695,383	40,791,195	41,265,451	42,590,561	43,516,290
SMS per Subscription	45	70	77	86	91

1.4 Mobile Data Subscriptions and Penetration Rate (%)

Mobile data subscriptions continued to expand in Q1 2026, increasing by 3.59% from 28.70 million in Q4 2025 to 29.73 million. This reflects sustained growth in data adoption over the review period.

On an annual basis, subscriptions grew by 11.27%, rising from 26.72 million at the end of Q1 2025 to 29.73 million in Q1 2026. The corresponding penetration rate stood at 87.65% as at end-Q1 2026, indicating a high level of market saturation (Figure 13; Table 12).

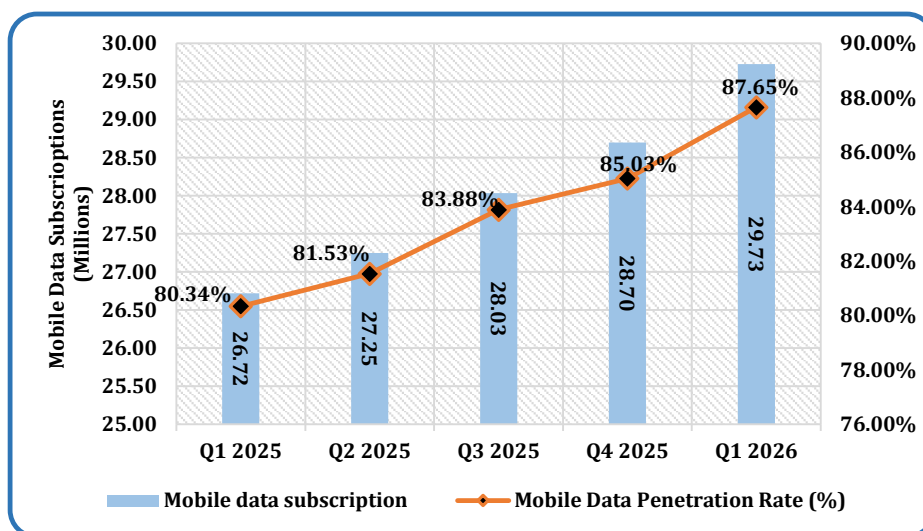


Figure 13: Mobile Data Subscriptions in Millions and Penetration Rate (%)

Table 12: Mobile Data Subscriptions and Penetration Rate

Subscription	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Mobile data subscription	26,717,143	27,247,268	28,033,573	28,698,390	29,727,471
Data Subscription Growth Rate	2.26%	1.98%	2.89%	2.37%	3.59%
Net Additions	589,551	530,125	786,305	664,817	1,029,081
Net Additions Growth Rate	4.03%	-10.08%	48.32%	-15.45%	54.79%
Population	33,254,867	33,419,924	33,584,980	33,750,036	33,915,092
Mobile Data Penetration Rate	80.34%	81.53%	83.47%	85.03%	87.65%

1.4.1 Machine-to-Machine Subscriptions

Machine-to-Machine (M2M) mobile subscriptions continued their upward trajectory, reaching 3.64 million at the end of Q1 2026, up from 3.54 million in Q4 2025. This represents a quarter-on-quarter growth of 2.80%, indicating sustained expansion in connected devices and IoT-driven applications.

On a year-on-year basis, subscriptions grew from 2.84 million in Q1 2025 to 3.64 million in Q1 2026, reflecting a robust increase of 28.17%. This trend underscores the accelerating adoption of M2M services across sectors (Figure 14; Table 13).

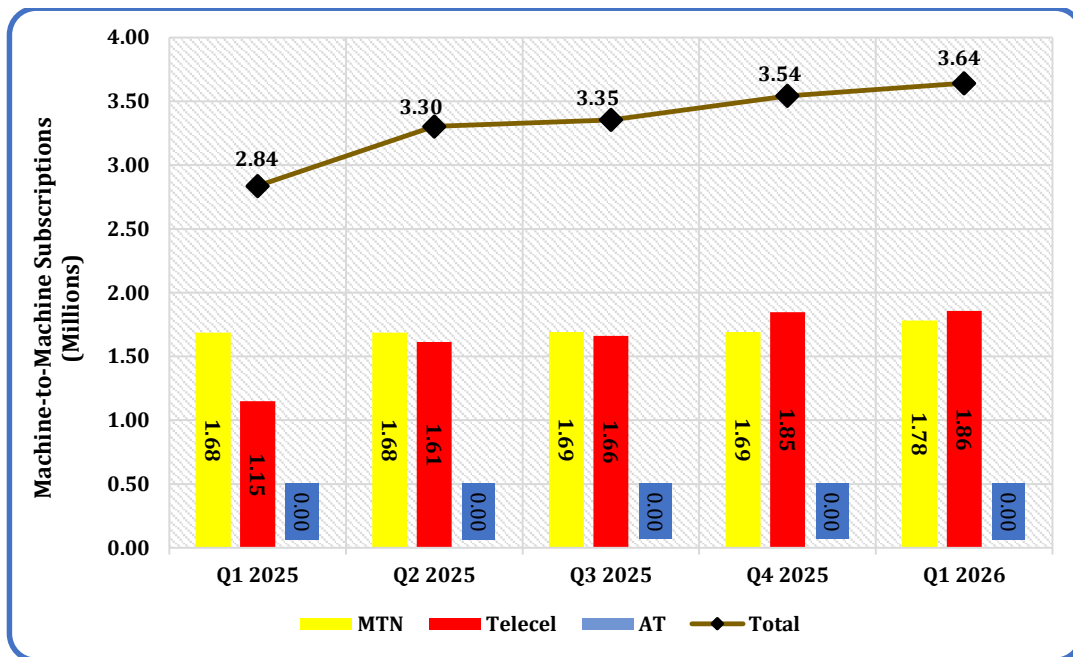


Figure 14: Machine-to-Machine (M2M) Subscriptions

Table 13: Machine-to-Machine Subscriptions

Mobile Network Operator	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
MTN	1,684,845	1,684,845	1,690,405	1,691,740	1,781,757
Telecel	1,147,872	1,614,039	1,660,106	1,847,059	1,856,887
AT	2,860	3,016	3,419	3,256	2,513
Total	2,835,577	3,301,900	3,353,930	3,542,055	3,641,157

1.4.2 Mobile Data Prepaid and Postpaid Subscriptions

As at the end of Q1 2026, prepaid mobile data subscriptions continued to dominate the market, increasing from 28.45 million in Q4 2025 to 29.47 million. This segment accounted for an overwhelming 99.12% of total mobile data subscriptions, underscoring the market’s strong reliance on prepaid offerings.

Postpaid subscriptions also recorded an increase, rising from 0.25 million to 0.27 million over the same period, and representing 0.88% of total subscriptions. (Figure 15; Table 14).

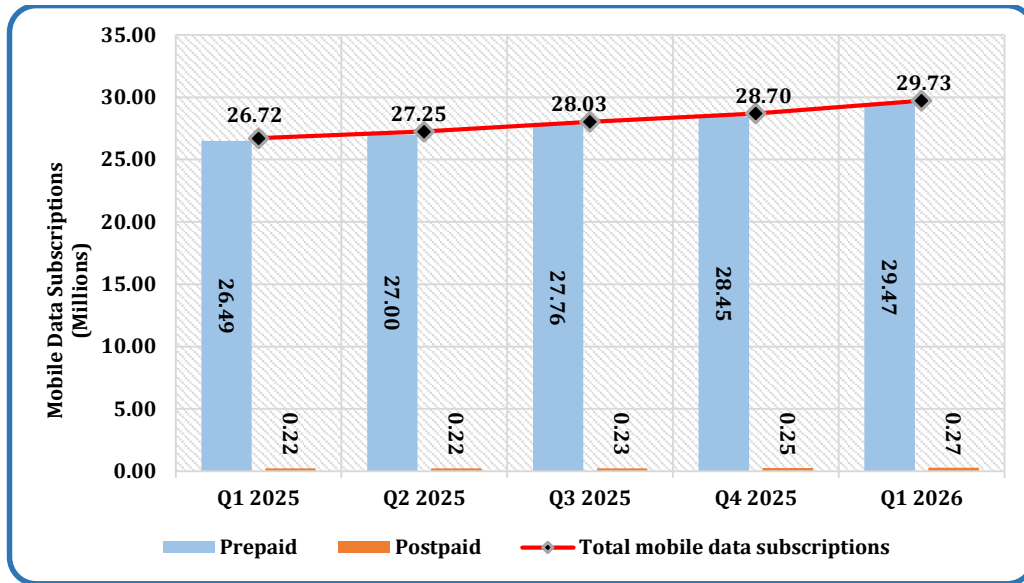


Figure 15: Mobile Data Prepaid and Postpaid Subscriptions

Table 14: Mobile Data Subscriptions (Prepaid/Postpaid)

Mobile Data Subscriptions		Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Prepaid	Subscriptions	26,490,317	26,997,655	27,758,748	28,446,083	29,467,302
	Market Share	99.15%	99.08%	99.02%	99.12%	99.12%
Post-paid	Subscriptions	226,826	249,613	274,825	252,307	260,169
	Market Share	0.85%	0.92%	0.98%	0.88%	0.88%
Total mobile data subscriptions		26,717,143	27,247,268	28,033,573	28,698,390	29,727,471

1.4.3 Mobile Data Subscription per Operator

As at the end of Q1 2026, MTN retained a leading position in the mobile data market, recording 23.82 million subscriptions and accounting for 80.12% of total subscriptions. This underscores its strong market leadership, driven by extensive network coverage and a large subscriber base.

Telecel ranked second with 4.62 million subscriptions, representing 15.53% of the market, while AT recorded 1.29 million subscriptions, corresponding to a 4.34% share. (Figure 16; Table 15).

This distribution highlights MTN’s continued prominence in the mobile data segment, supported by its extensive subscriber base, while Telecel and AT maintained moderate shares within the growing data services market.

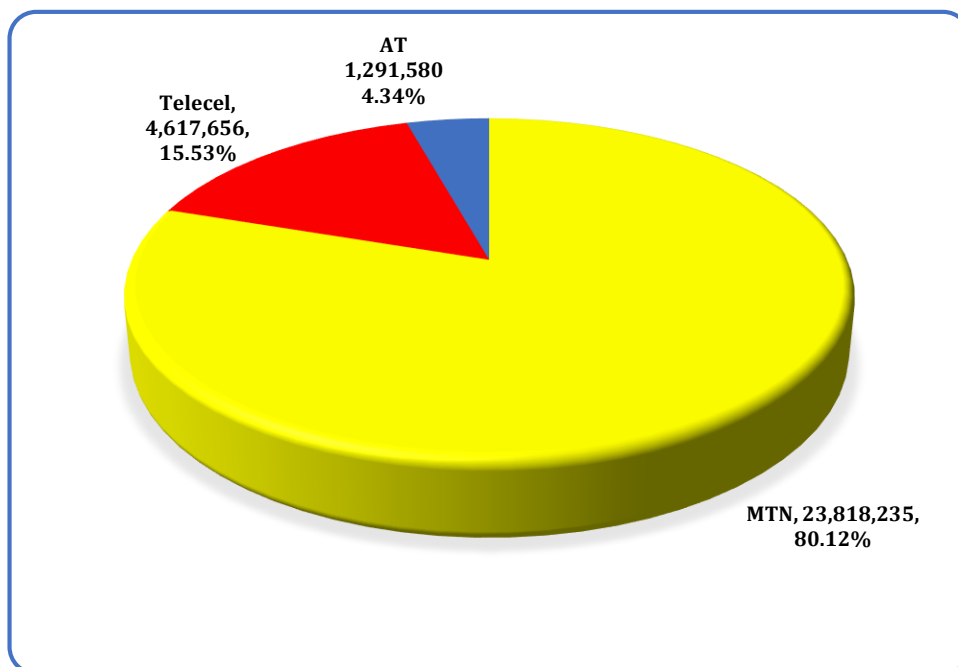


Figure 16: Mobile Data Market Share per Operator

Table 15: Mobile Data Subscriptions per Mobile Network Operator and Market Share

Mobile Network Operator	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
MTN	21,118,921	21,184,896	21,958,090	22,867,689	23,818,235
	79.05%	77.75%	78.33%	79.68%	80.12%
Telecel	3,983,835	4,434,780	4,517,633	4,528,907	4,617,656
	14.91%	16.28%	16.12%	15.78%	15.53%
AT	1,614,387	1,627,592	1,557,850	1,301,794	1,291,580
	6.04%	5.97%	5.56%	4.54%	4.34%
Total	26,717,143	27,247,268	28,033,573	28,698,390	29,727,471

1.4.4 Mobile Data Traffic

Total mobile data traffic continued its upward trajectory in Q1 2026, reaching 1,250,099 TB, representing a quarter-on-quarter increase of 13.51% from 1,101,301 TB recorded in Q4 2025. This reflects a sustained expansion in data usage over the review period.

On a year-on-year basis, data traffic grew markedly by 65.52%, rising from 755,267 TB in Q1 2025 to 1,250,099 TB in Q1 2026 (Figure 17; Table 16). This substantial growth both quarterly and annually indicated the sustained surge in data consumption.

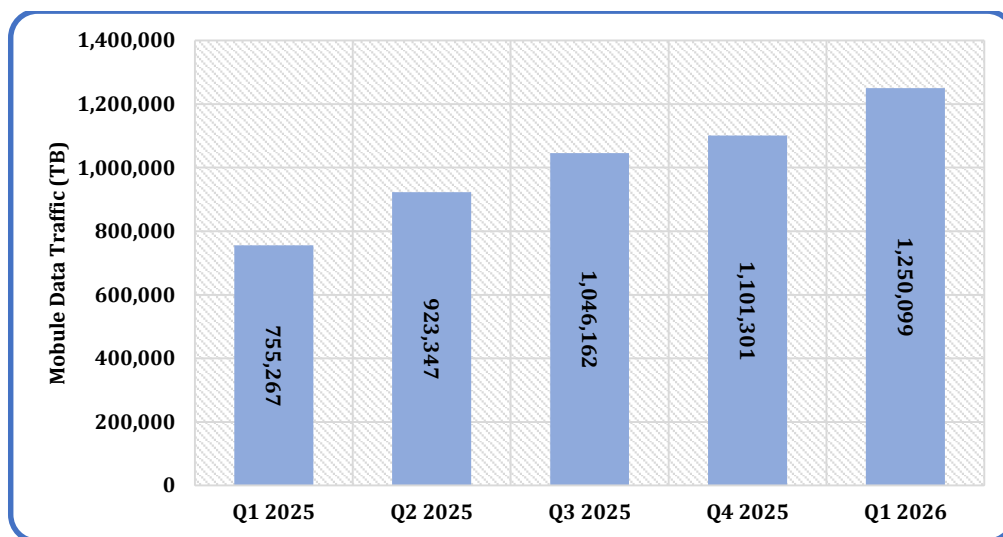


Figure 17: Mobile Data Traffic in Terabytes (TB)

Table 16: Mobile Data Traffic in Terabytes (TB)

Quarter	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Total Mobile data usage (TB)	755,267	923,347	1,046,162	1,101,301	1,250,099

1.4.5 Mobile Data Usage per Subscription³

Average mobile data usage per subscription increased in Q1 2026, rising from 0.0388 TB in Q4 2025 to 0.0431 TB, representing a quarter-on-quarter growth of 11.00%. This reflects a continued intensification in data consumption at the user level.

On a year-on-year basis, average usage per subscription grew significantly by 50.46%, increasing from 0.0286 TB in Q1 2025 to 0.0431 TB in Q1 2026. The growth in per-user data consumption underscores a structural shift toward higher data usage, and greater reliance on mobile broadband for digital activities (Figure 18; Table 17).

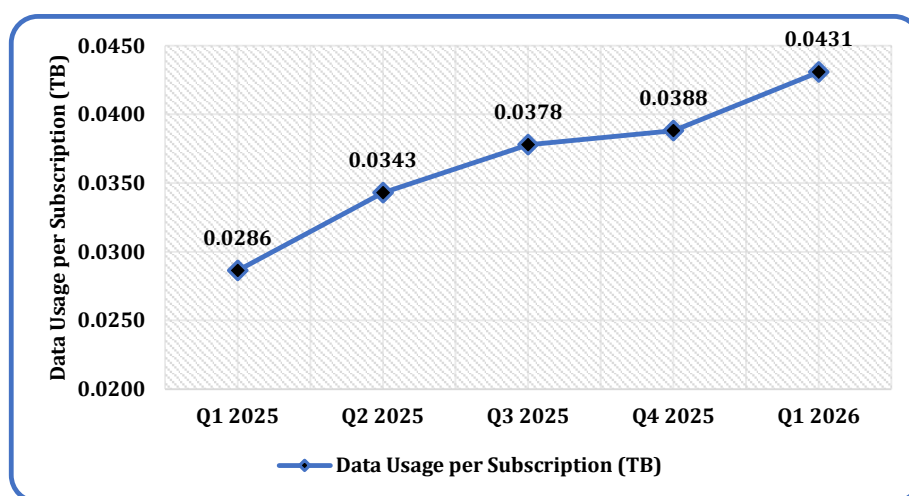


Figure 18: Mobile Data Usage per Subscription (TB)

³ Mobile data usage per subscription is calculated by dividing the total volume of data traffic for the quarter by the total average mobile data subscription for that quarter.

Table 17: Mobile Data Usage per Subscription (TB)

Quarter	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Total Mobile data usage (TB)	755,267	923,347	1,046,162	1,101,301	1,250,099
Average Data Subscription	26,378,393	26,921,399	27,680,525	28,377,847	29,018,905
Data Usage per Subscription (TB)	0.0286	0.0343	0.0378	0.0388	0.0431

1.4.6 Mobile Data Traffic per Operator

MTN accounted for the largest share of mobile data traffic in Q1 2026, generating 1,091,499 TB and representing 87.31% of total traffic. This reflects its leading position in the data market.

Telecel recorded 143,696 TB, corresponding to a 11.49% market share, while AT generated 14,904 TB, accounting for 1.19% of total data traffic. (Figure 19; Table 18).

This distribution underscores MTN’s continued leadership in mobile data services, supported by its extensive subscriber base, while Telecel and AT maintained smaller but growing shares within the data market.

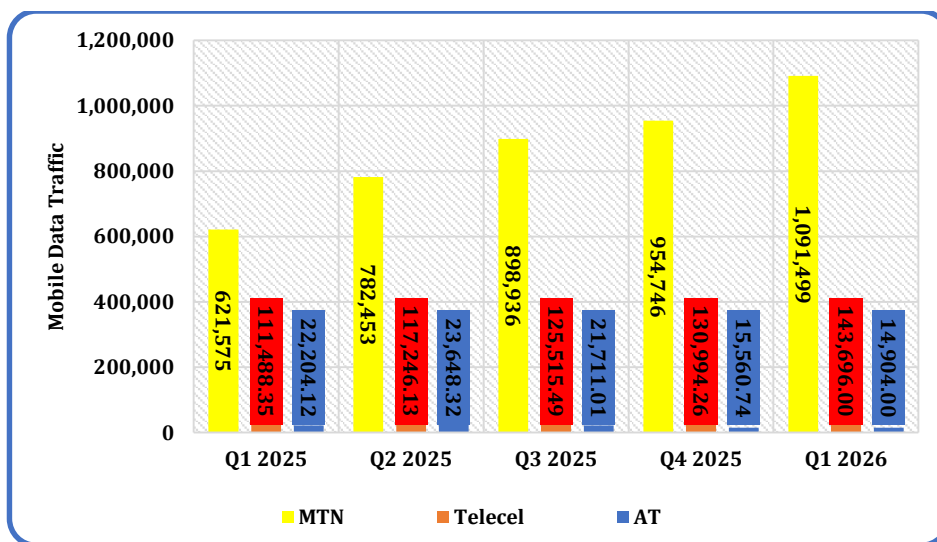


Figure 19: Mobile Internet Traffic (TB) per Operator

Table 18: Mobile Data Traffic per Operator (TB)

Mobile Operator	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
MTN	621,575	782,453	898,936	954,746	1,091,499
	82.30%	84.74%	85.93%	86.69%	87.31%
Telecel	111,488	117,246	125,515	130,994	143,696
	14.76%	12.70%	12.00%	11.89%	11.49%
AT	22,204	23,648	21,711	15,561	14,904
	2.94%	2.56%	2.08%	1.41%	1.19%
Total Industry Traffic (TB)	755,267	923,347	1,046,162	1,101,301	1,250,099

1.5 Mobile Telecommunications Service Tariffs

In Q1 2026, average default tariffs for mobile services remained broadly unchanged, indicating price stability across the market. Both off-net and on-net voice tariffs were maintained at GHS 0.14 per minute, suggesting limited pricing differentiation between intra- and inter-network calls.

Similarly, the average default tariff for SMS—both on-net and off-net—remained at GHS 0.06 per message, reflecting a consistent pricing structure within the messaging segment.

For mobile data services, the average default tariff stood at GHS 0.14 per megabyte (MB) during the review period.

Overall, the stability in tariff levels points to a relatively steady pricing environment, with no significant adjustments observed across key service categories in the quarter. (Figure 20; Table 19).

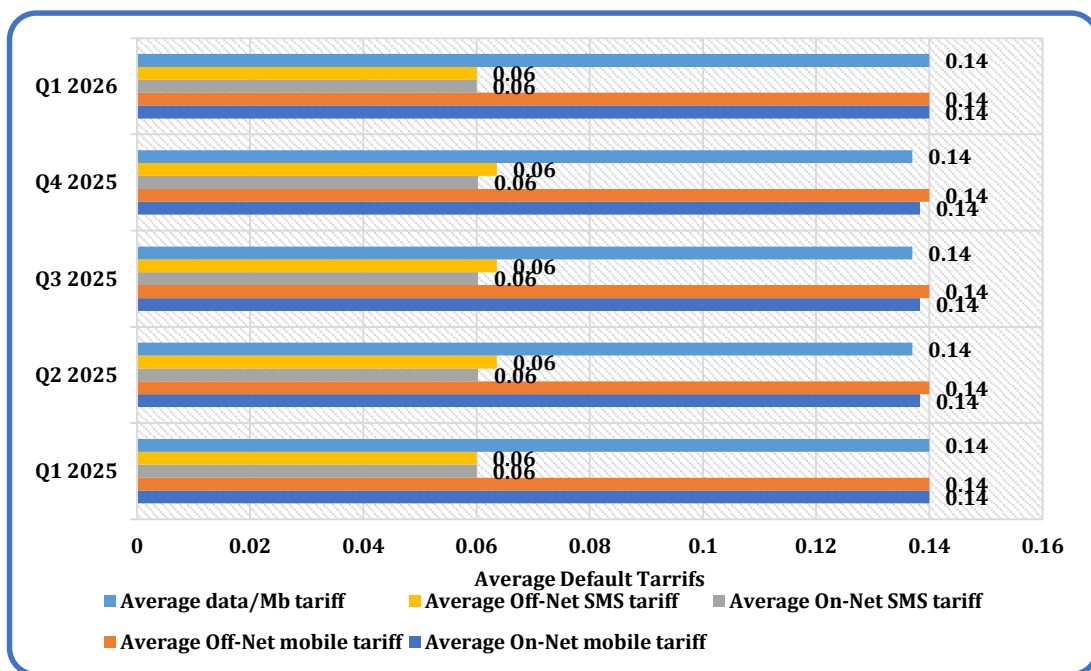


Figure 20: Average Mobile Tariffs per Service

Table 19: Average Mobile Tariff per Service (GHS)

Tariffs	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Average On-Net mobile tariffs	0.14	0.14	0.14	0.14	0.14
Average Off-Net mobile tariffs	0.14	0.14	0.14	0.14	0.14
Average On-Net SMS tariffs	0.06	0.06	0.06	0.06	0.06
Average Off-Net SMS tariffs	0.06	0.06	0.06	0.06	0.06
Average data/Mb tariffs	0.14	0.14	0.14	0.14	0.14

1.6 Devices and Terminals

1.6.1 Devices per MNOs

At the end of Q1 2026, a total of 44.29 million devices were connected across MTN and AT networks⁴ This represents a quarter-on-quarter decline of 4.97% from 46.61 million recorded in Q4 2025, indicating a reduction in active device connectivity during the period.

Of the total connected devices, MTN accounted for 42.15 million, representing a dominant share of 95.16%, while AT recorded 2.14 million devices, corresponding to 4.84% of total connections. The distribution highlights a highly concentrated device ecosystem, with MTN maintaining a substantial lead in network connectivity.

On a year-on-year basis, however, connected devices across networks increased by 9.29%, rising from 40.53 million in Q1 2025 to 44.29 million in Q1 2026. This suggests that despite the short-term contraction, the broader trend in device connectivity remains upward, reflecting continued expansion in mobile access and usage. (Figure 21; Table 20).

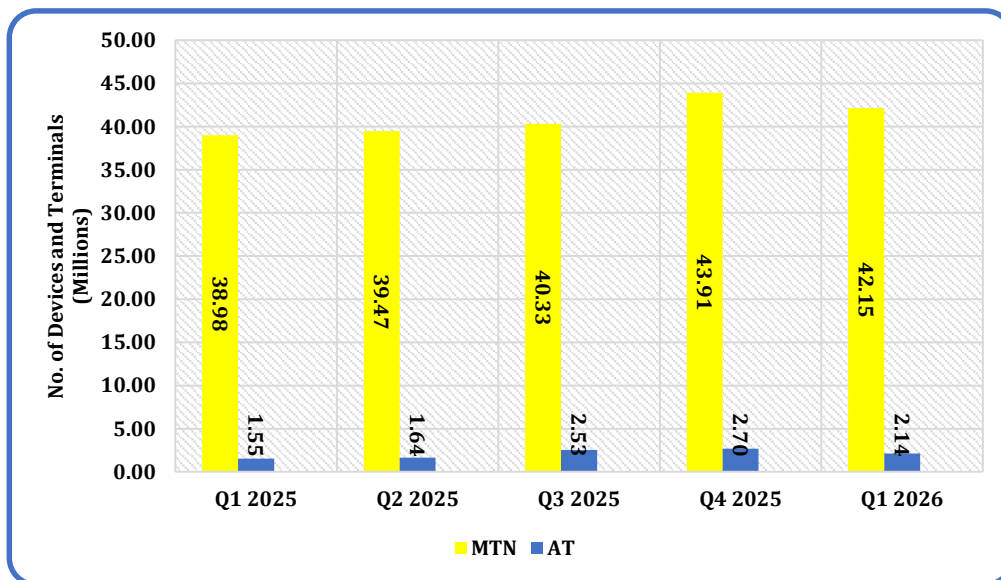


Figure 21: Devices per MNOs

Table 20: Devices per MNOs

No	MNO	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
1	MTN	38,978,685	39,474,945	40,329,292	43,908,343	42,150,170
	Market Share	96.17%	96.01%	94.09%	94.21%	95.16%
	Growth	3.90%	1.27%	2.16%	8.87%	-4.00%
2	AT	1,550,783	1,638,632	2,532,705	2,700,520	2,142,933
	Market Share	3.83%	3.99%	5.91%	5.79%	4.84%
	Growth	-41.24%	5.66%	54.56%	6.63%	-20.65%
Total Devices		40,529,468	41,113,577	42,861,997	46,608,863	44,293,103

⁴ Telecel excluded due to non-submission of data for the period under review

1.6.2 Devices per Types

As at the end of Q1 2026, total connected devices stood at 44.29 million. Smartphones constituted the majority, accounting for 61.79% (27.37 million) of all devices. Basic phones followed with 26.59% (11.78 million), while feature phones represented 11.62% (5.15 million).

The device mix indicates a clear shift toward smartphones, underscoring the growing adoption of internet-enabled devices capable of supporting data-intensive services. This trend aligns with the observed expansion in mobile data usage and reflects increasing consumer preference for broadband-enabled connectivity. (Figure 22; Table 21).

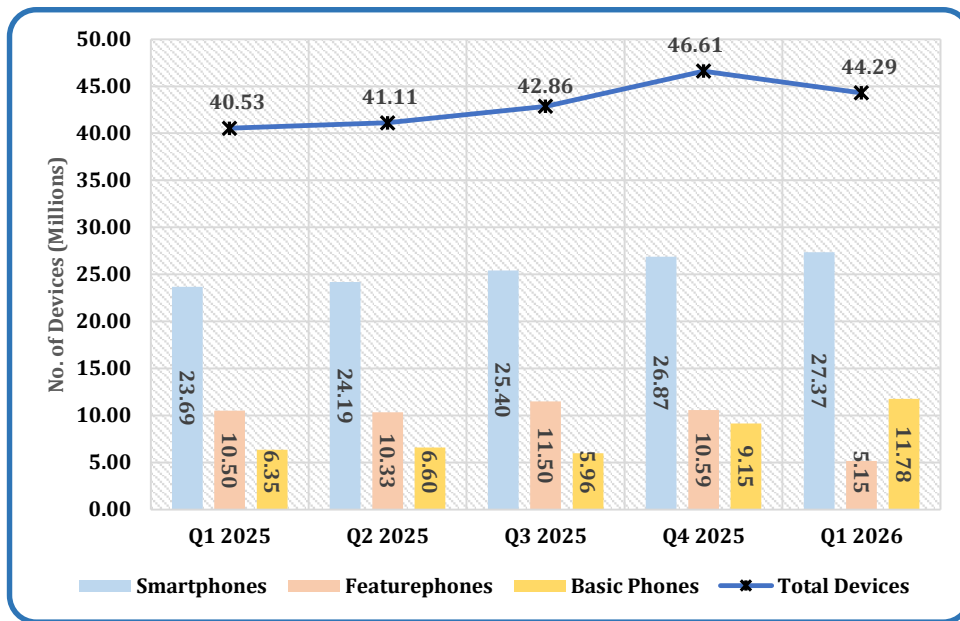


Figure 22: Devices per Types

Table 21: Devices per Type

No	Category of Phones	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
1	Smartphone Devices	23,685,752	24,188,976	25,399,355	26,873,338	27,366,508
	Market Share	58.44%	58.83%	59.26%	57.66%	61.79%
	Growth	1.94%	2.12%	5.00%	5.80%	1.84%
2	Feature Phone Devices	10,495,239	10,328,864	11,501,039	10,585,002	5,146,916
	Market Share	25.90%	25.12%	26.83%	22.71%	11.62%
	Growth	-2.76%	-1.59%	11.35%	-7.96%	-51.38%
3	Basic Phone Devices	6,348,477	6,595,737	5,961,603	9,150,523	11,779,679
	Market Share	15.66%	16.04%	13.91%	19.63%	26.59%
	Growth	3.66%	3.89%	-9.61%	53.49%	28.73%
Total		40,529,468	41,113,577	42,861,997	46,608,863	44,293,103

2.0 BROADBAND WIRELESS ACCESS (BWA)

As at the end of Q1 2026, Telesol is the only entity operating as a Broadband Wireless Access service provider in the country.

2.1 BWA Subscriptions and Penetration Rate

Broadband Wireless Access (BWA) subscriptions remained unchanged at 1,454 as at the end of Q1 2026, consistent with the level recorded in Q4 2025, indicating a stagnation in subscriber uptake over the quarter.

This flat trend extends on a year-on-year basis, with subscriptions holding constant at 1,454 from Q1 2025 to Q1 2026. Consequently, BWA penetration remained marginal at 0.0043%, underscoring its negligible contribution to overall broadband access in the country (Figure 23; Table 22).

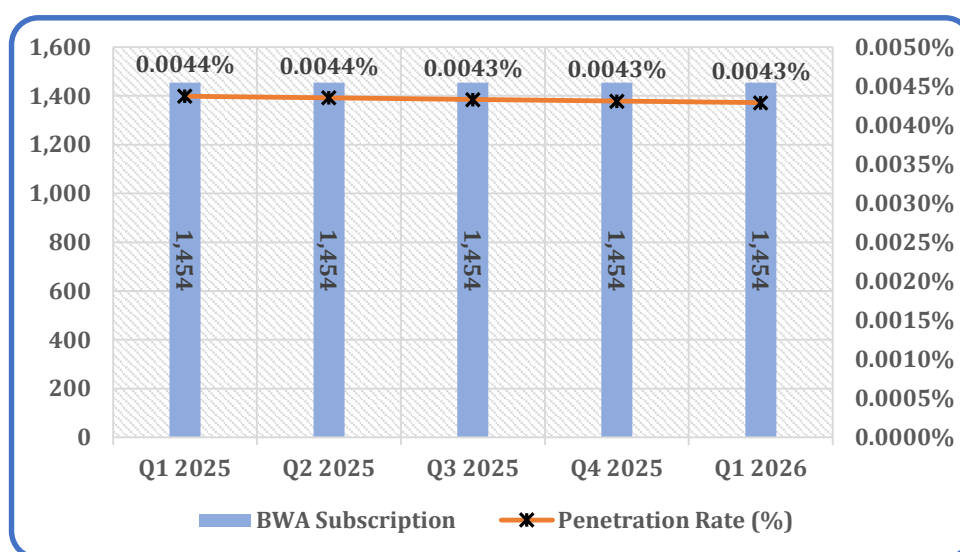


Figure 23: BWA Subscription and Penetration Rate

Table 22: BWA Data Subscriptions and Penetration Rate

BWA Operator	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Subscription	1,454	1,454	1,454	1,454	1,454
Growth rate	0.00%	0.00%	0.00%	0.00%	0.00%
Net Additions	0	0	0	0	0
Population	33,254,867	33,419,924	33,584,980	33,750,036	33,915,092
Penetration Rate	0.0044%	0.0044%	0.0043%	0.0043%	0.0043%

2.2 Broadband Wireless Access (BWA) Volume of Data Traffic

Total data traffic carried over the Broadband Wireless Access (BWA) network declined to 69.04 TB at the end of Q1 2026, down from 110.05 TB recorded in Q4 2025. This represents a quarter-on-quarter contraction of 37.26%, indicating a reduction in usage level on the only BWA platform.

On an annual basis, BWA data traffic fell more sharply by 51.25%, from 141.62 TB in Q1 2025 to 69.04 TB in Q1 2026. The sustained decline suggests weakening demand and a continued shift of data consumption towards alternative broadband technologies (Figure 24; Table 23).

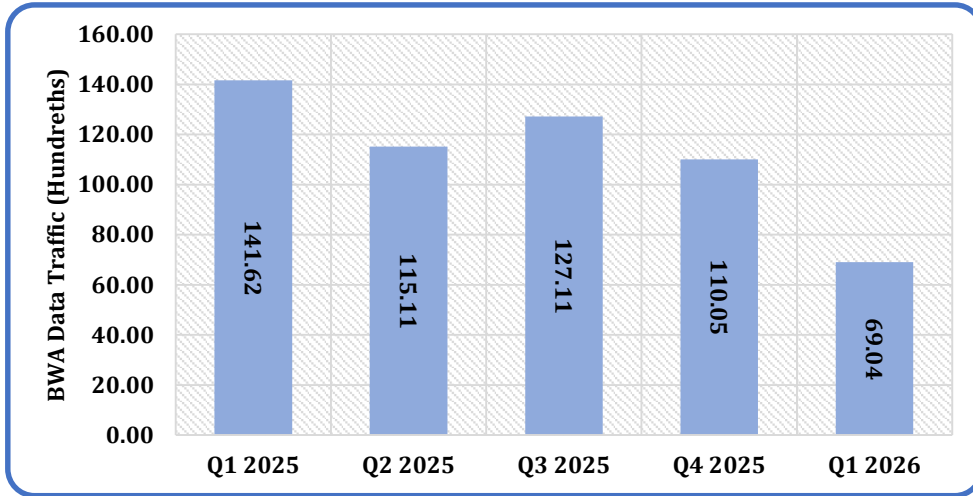


Figure 24: BWA Data Traffic (TB)

Table 23: Broadband Wireless Access Data Traffic

Quarter	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Industry Total (TB)	141.62	115.11	127.11	110.05	69.04 ⁵

2.3 Data Usage per BWA Subscription⁶

Average data consumption per Broadband Wireless Access (BWA) subscription declined to 0.047 TB in Q1 2026, down from 0.076 TB in Q4 2025. This reflects a quarter-on-quarter contraction of 37.26%, indicating reduced intensity of usage among BWA subscribers.

On a year-on-year basis, average usage fell from 0.097 TB in Q1 2025 to 0.047 TB in Q1 2026, representing a decline of 51.25%. (Figure 25; Table 24).

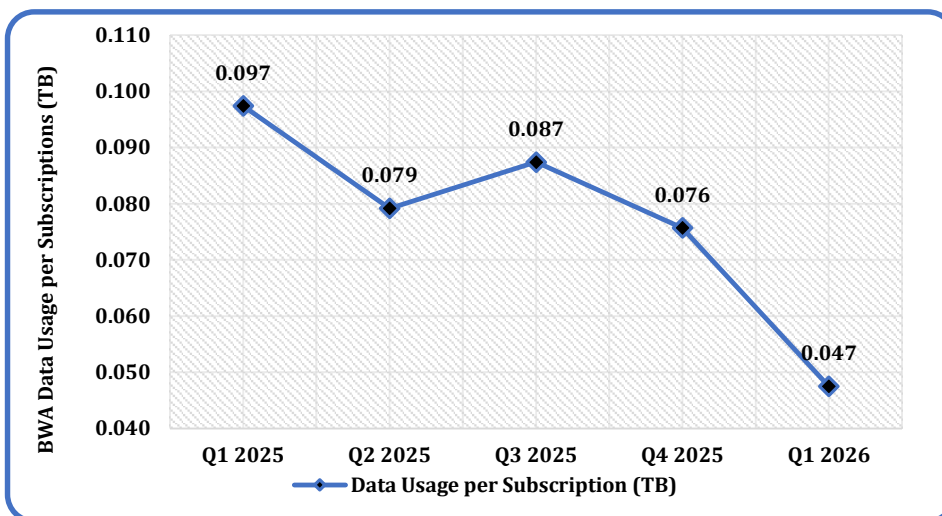


Figure 25: Data Usage per BWA Subscription (TB)

⁵ The data traffic in March 2026 captured data from 16th March 2026 to end of month due to system issues

⁶ BWA data per subscriptions is calculated by dividing the total volume of BWA’s traffic for the quarter by the total average of BWA subscriptions for that quarter.

Table 24: Data Usage per BWA Subscriptions (TB)

Quarter	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Total Volume of Data Traffic (TB)	170.49	141.62	115.11	127.11	69.04
Average BWA Subscription	1,454	1,454	1,454	1,454	1,454
Data Usage per Subscription (TB)	0.097	0.079	0.087	0.076	0.047

3.0 FIXED NETWORK

This section analyses the Fixed Telephone industry in Ghana. There are three (3) operators who provide this service, namely Telecel, AT and MTN.

3.1 Fixed Voice Subscriptions and Penetration Rate

At the end of Q1 2026, total fixed voice subscriptions declined by 1.14%, decreasing from 265,236 recorded at the end of Q4 2025 to 262,221. Consequently, the penetration rate for fixed voice services stood at 0.77% as of the end of the review period.

On a year-on-year basis, fixed voice subscriptions decreased from 267,881 in the first quarter of 2025 to 262,221 in the first quarter of 2026, representing a contraction of 2.11%. This trend indicates a continued decline in the uptake of fixed voice services over the period under review. This is shown in (Figure 26; Table 25).

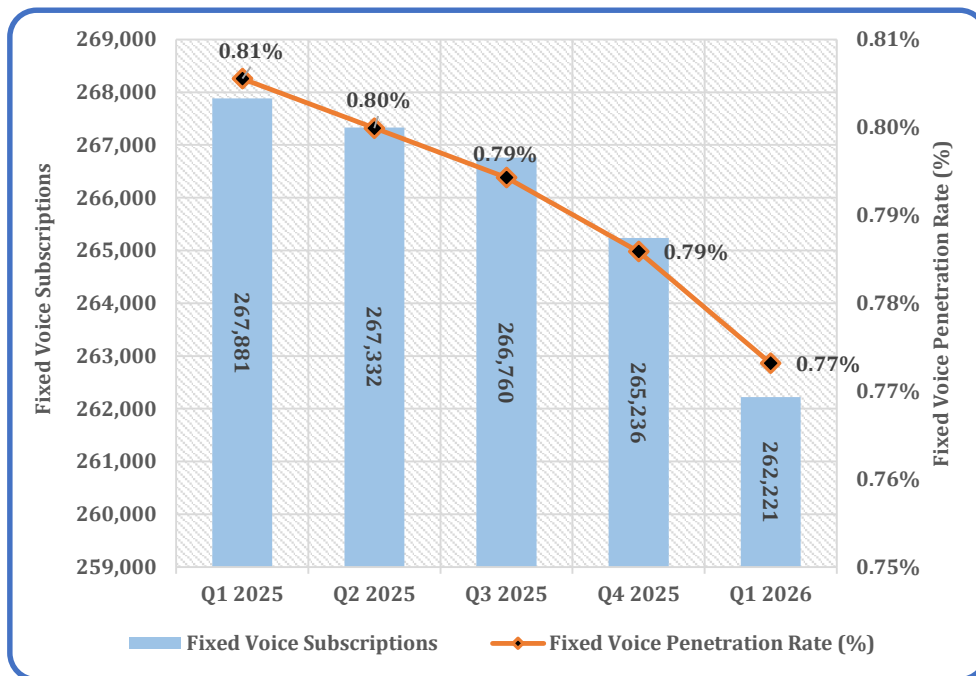


Figure 26: Fixed Network Voice Subscription and Penetration Rate

Table 25: Fixed Network Voice Subscriptions and penetration Rate (%)

Fixed Operator	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Telecel	260,250	259,442	258,552	257,536	254,778
	97.15%	97.05%	96.92%	97.10%	97.16%
AT	870	868	791	773	732
	0.32%	0.32%	0.30%	0.29%	0.28%
MTN	6,761	7,022	7,417	6,927	6,711
	2.52%	2.63%	2.78%	2.61%	2.56%
Total industry subscription	267,881	267,332	266,760	265,236	262,221
Population	33,254,867	33,419,924	33,584,980	33,750,036	33,915,092
Fixed Network Penetration Rate	0.81%	0.80%	0.79%	0.79%	0.77%

3.2 Fixed Voice Traffic

Fixed Voice Traffic increased by 16.25% from 6.94 million minutes in Q4 2025 to 8.06 million minutes at the end of Q1 2026.

Year-on-Year Fixed voice traffic also grew by 23.95% from 6.50 million minutes in Q1 2025 to 8.06 million minutes at the end of Q1 2026 (Figure 27; Table 26).

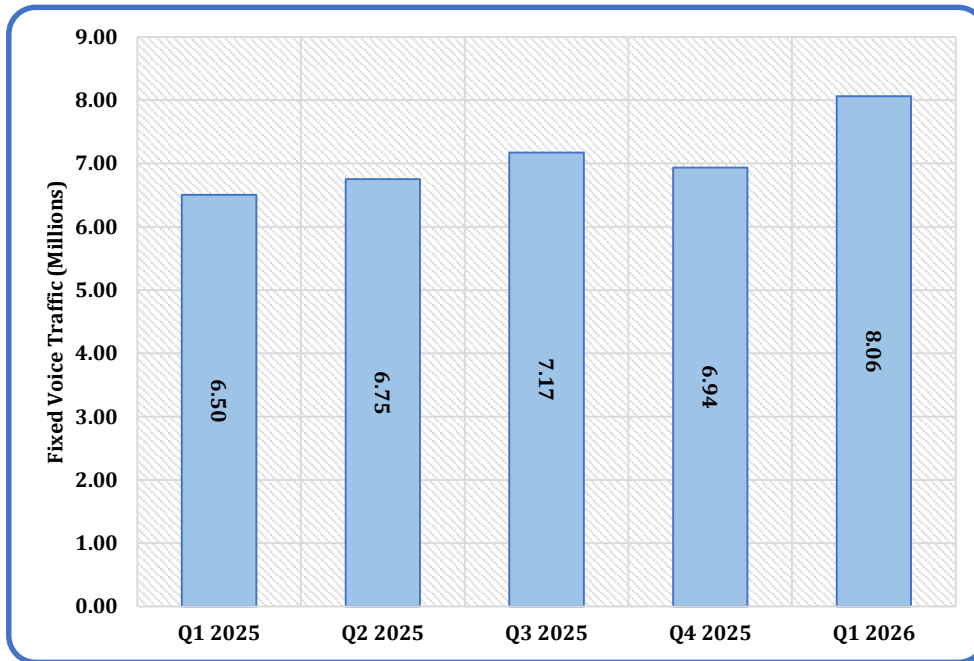


Figure 27: Total Fixed Voice Traffic

Table 26: Fixed Network Voice (in Minutes)

Traffic	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
On-Net Fixed voice traffic	606,666	880,856	994,193	894,149	841,005
Off-Net fixed voice traffic	5,898,098	5,870,022	6,176,378	6,041,489	7,221,840
Total Fixed Voice Traffic	6,504,764	6,750,878	7,170,571	6,935,638	8,062,845

3.3 Fixed Voice Minutes of Use⁷

Fixed Voice Traffic per subscription increased by 16.87% from 26.11 minutes in Q4 2025 to 30.52 minutes at the end of Q1 2026.

Year-on-Year minutes of use per subscription also grew by 26.04% from 24.21 minutes in Q1 2025 to 30.52 minutes at the end of Q1 2026 (Figure 28; Appendix A, Table 27).

⁷ Fixed Network Minutes of use per subscriptions is calculated by dividing the total volume of traffic for the quarter by the total average fixed subscriptions for that quarter.

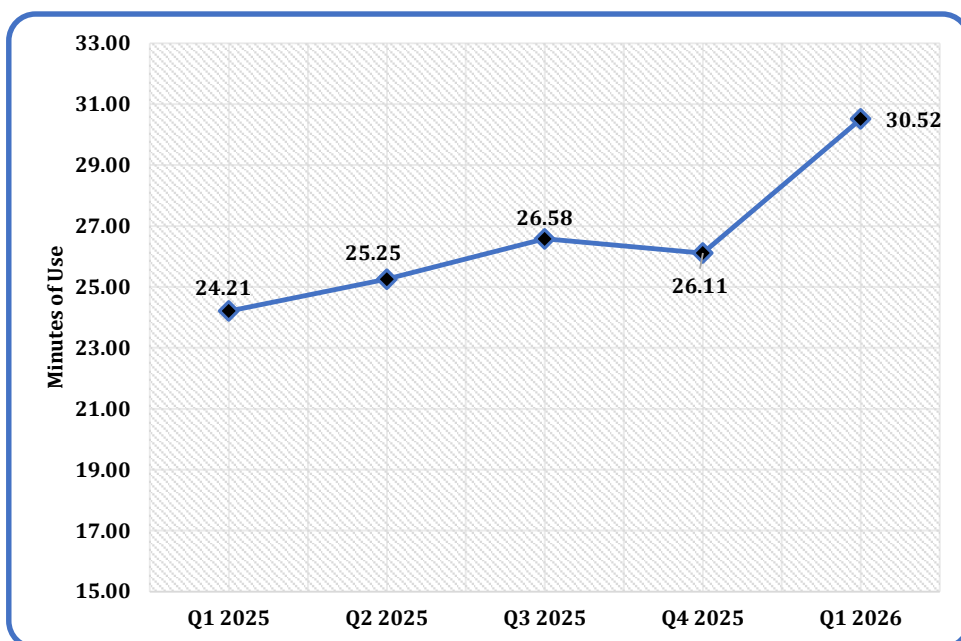


Figure 28: Fixed Network Minutes of Use

Table 27: Fixed Network Voice (Minute of Use per Subscriptions)

Fixed Network (MoU)	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Total Fixed Voice Traffic	6,504,764	6,750,878	7,170,571	6,935,638	8,062,845
Average Fixed Subscription	268,674	267,332	269,784	265,613	264,220
Minutes of Use per Subscription (MoU)	24.21	25.25	26.58	26.11	30.52
Growth Rate	12.14%	4.30%	5.25%	-1.76%	16.87%

3.4 Fixed Line Data Subscriptions and Penetration Rate

Fixed line data subscriptions increased from 175,458 recorded in Q4 2025 to 189,091 at the end of Q1 2026, representing a growth rate of 7.77%.

On a year-on-year basis, fixed data subscriptions rose by 41.25%, increasing from 133,872 in the first quarter of 2025 to 189,091 at the end of the first quarter of 2026.

The fixed data penetration rate during the review period was 0.56% (Figure 29; Table 28).

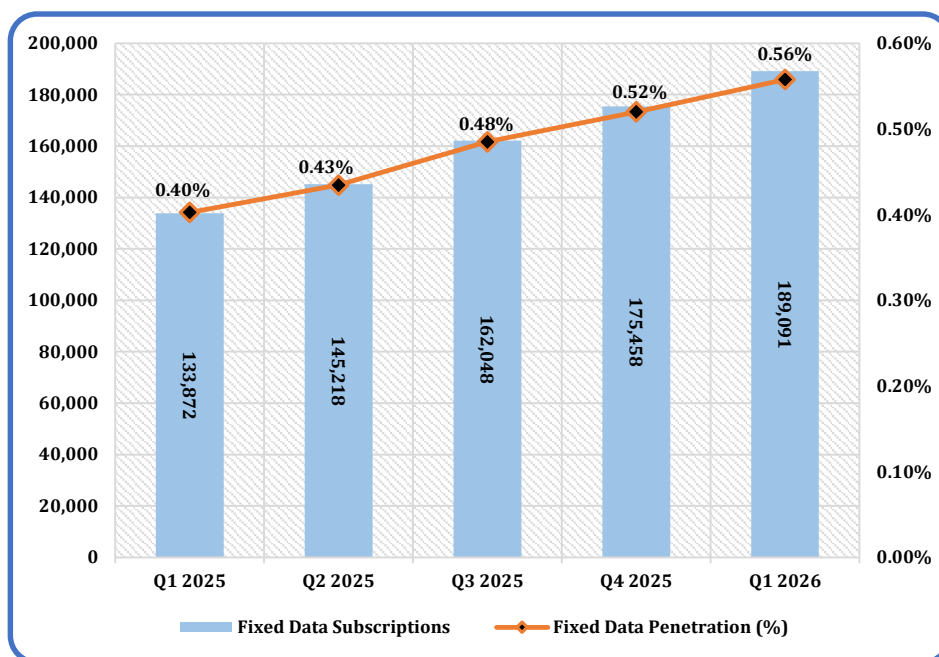


Figure 29: Fixed Data Subscriptions and Penetration Rate

Table 28: Fixed Line Data Subscriptions and Penetration Rate (%)

Fixed Network Operator	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Telecel	85,284	88,438	91,217	92,515	96,845
	63.71%	60.90%	56.29%	52.73%	51.22%
AT	363	378	350	343	345
	0.27%	0.26%	0.22%	0.20%	0.18%
MTN	48,225	56,402	70,481	82,600	91,901
	36.02%	38.84%	43.49%	47.08%	48.60%
Total Fixed data	133,872	145,218	162,048	175,458	189,091
Population	33,254,867	33,419,924	33,419,925	33,750,036	33,915,092
Fixed Data Penetration	0.40%	0.43%	0.48%	0.52%	0.56%

3.5 Fixed Data Subscriptions per Operator

At the end of Q1 2026, Telecel recorded 96,845 fixed data subscriptions, representing 51.22% of the total market share, up from 92,515 subscriptions in the previous quarter.

MTN followed with 91,901 fixed data subscriptions, accounting for 48.60% of the market, compared to 82,600 subscriptions in Q4 2025.

AT, on the other hand, recorded 345 fixed data subscriptions at the end of Q1 2026, representing 0.18% of the total market, marginally up from 343 in the preceding quarter (Figure 30; Table 29).

This distribution indicates Telecel's continued leadership in the fixed data segment, while MTN sustained strong quarter-on-quarter growth and continued to narrow the gap with the market leader.

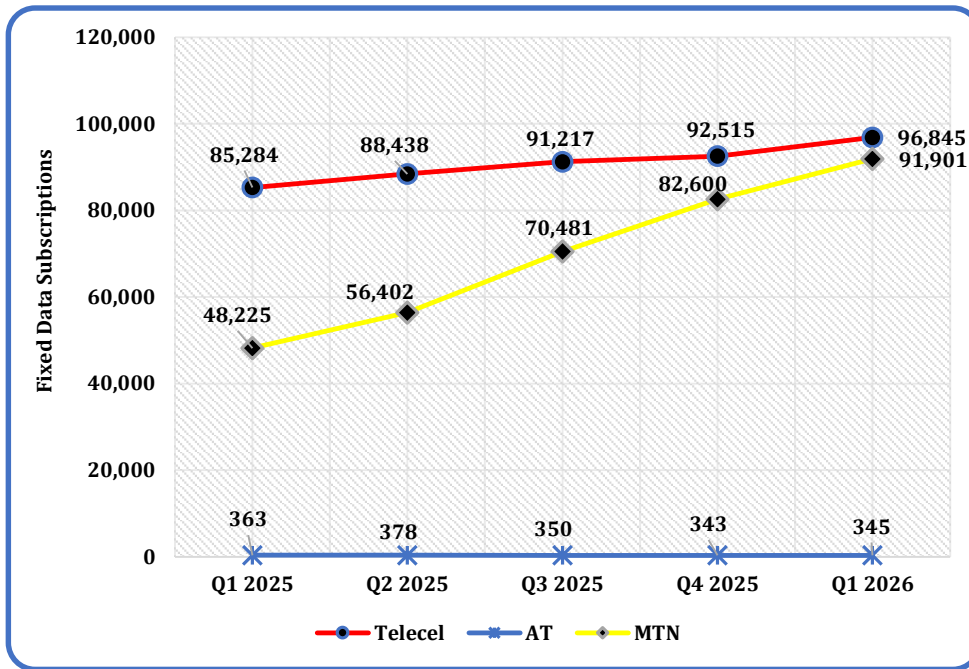


Figure 30: Fixed Data Subscription per Operator

Table 29: Fixed Line Data Subscriptions per Network Operator

Fixed Network Operator	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Telecel	85,284	88,438	91,217	92,515	96,845
AT	363	378	350	343	345
MTN	48,225	56,402	70,481	82,600	91,901
Total Fixed Data Subscription	133,872	145,218	162,048	175,458	189,091

3.6 Fibre Broadband Subscriptions

During Q1 2026, the total Fiber Broadband subscriptions in the country increased by 4.26%, rising from 261,938 recorded at the end of Q4 2025 to 273,095.

On a year-on-year basis, Fibre Broadband subscriptions grew by 4.26%, increasing from 227,350 at the end of Q1 2025 to 273,095 at the end of Q1 2026 (Figure 31; Appendix A, Table 30).

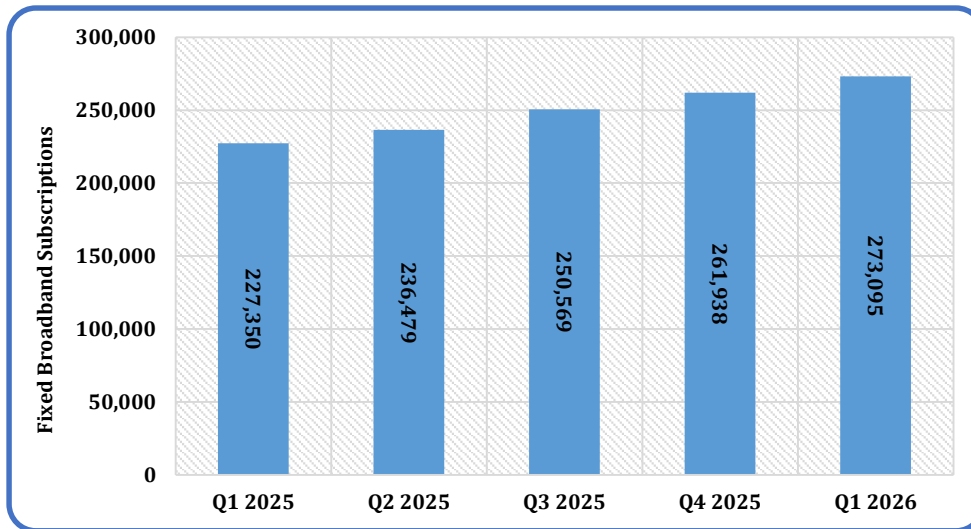


Figure 31: Fibre Broadband Subscription

Table 30: Fibre Broadband Subscriptions

Quarter	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Fibre Broadband Subscription	227,350	236,479	250,569	261,938	273,095

3.6.1 Fibre Broadband Subscriptions per Operator

At the end of Q1 2026, MTN recorded a fibre broadband subscription base of 178,718 representing a market share of 65.45%, compared to 171,862 subscriptions in the previous quarter. Telecel accounted for 94,337 fibre broadband subscriptions during the same period, corresponding to a market share of 34.55%.

Quarter-on-quarter analysis shows that MTN's fiber broadband subscriptions grew by 3.99%, rising from 171,862 in Q4 2025 to 178,718 in Q1 2026, while Telecel's fibre subscriptions also increased by 4.73%, from 90,076 to 94,337 over the same period.

On a year-on-year basis, fibre broadband subscriptions for MTN and Telecel increased by 23.68% and 13.86%, respectively (Figure 32; Table 31).

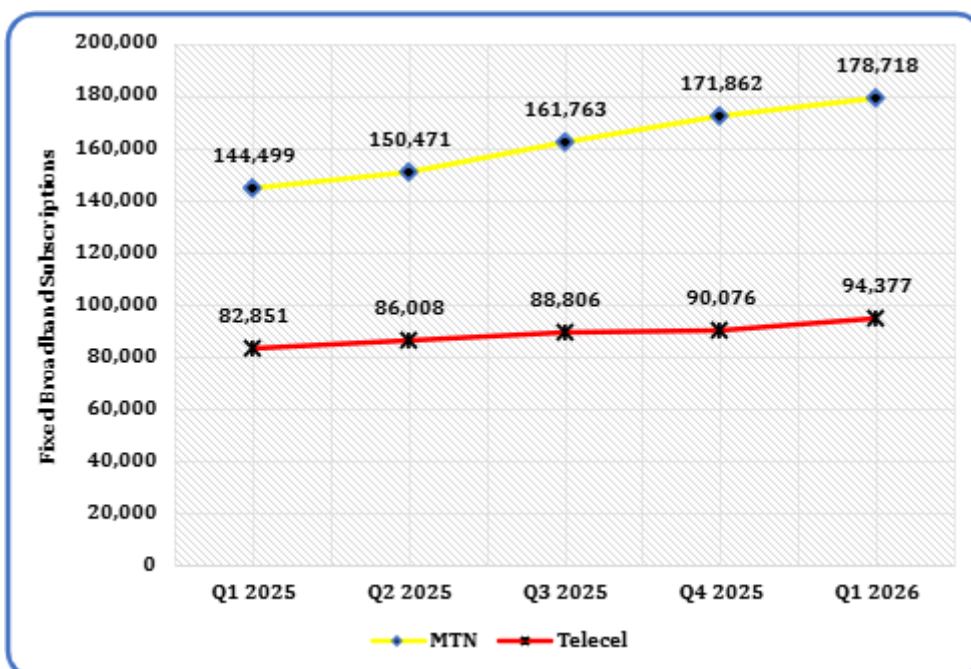


Figure 32: Fibre Broadband Subscription per Operator

Table 31: Fibre Broadband Subscriptions per Operator

Fibre Broadband Operators	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
MTN	144,499	150,471	161,763	171,862	178,718
Telecel	82,851	86,008	88,806	90,076	94,377
Total	227,350	236,479	250,569	261,938	273,095

3.6.2 Fiber Broadband Traffic

In the quarter under review, total fibre broadband traffic declined by 4.03%, falling from 130,209 (TB) in Q4 2025 to 124,962 TB in the reference period.

On a year-on-year basis, total fibre broadband traffic also recorded a growth rate of 11.40%, increasing from 112,174 TB in Q1 2025 to 124,962 TB at the end of Q1 2026.

Quarter-on-quarter shows that MTN’s fibre broadband traffic fell from 73,449 TB in Q4 to 69,650 TB in Q1 2026, representing a decline in growth by 5.17%.

Telecel’s fibre broadband traffic also recorded a decline in growth by 2.55%, from 56,760 TB to 55,312 TB over the same period.

On a year-on-year basis, MTN’s fibre broadband traffic grew by 17.11%, while Telecel’s increased by 4.96% (Figure 33; Table 32).

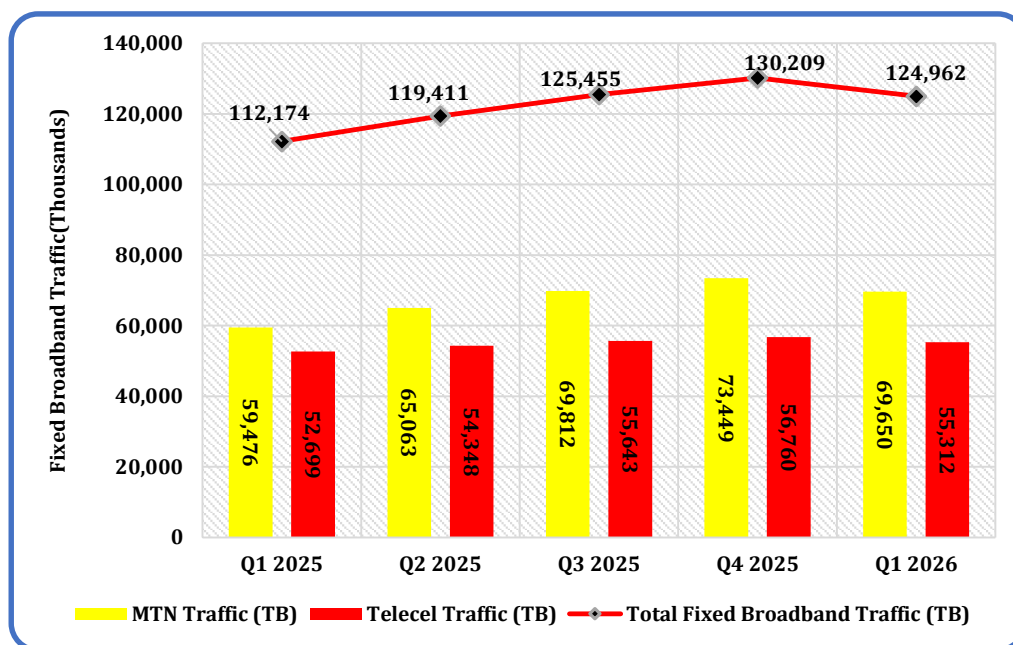


Figure 33: Fibre Broadband Traffic (TB)

Table 32: Fibre Broadband Traffic

Fibre Broadband Operators	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
MTN (TB)	59,476	65,063	69,812	73,449	69,650
Telecel (TB)	52,699	54,348	55,643	56,760	55,312
Total Fibre Broadband Traffic (TB)	112,174	119,411	125,455	130,209	124,962

3.7 Satellite Broadband Subscriptions

Ghana has licenced satellite providers to provide high-speed internet connectivity in the country through Low Earth Orbit (LEO) satellites. This section covers data from such services. As at the end of Q1, Starlink Ghana recorded a total satellite broadband subscription of 28,612 representing an increase of 26.01% from 22,706 in Q4 2025 (Figure 34; Table 33).

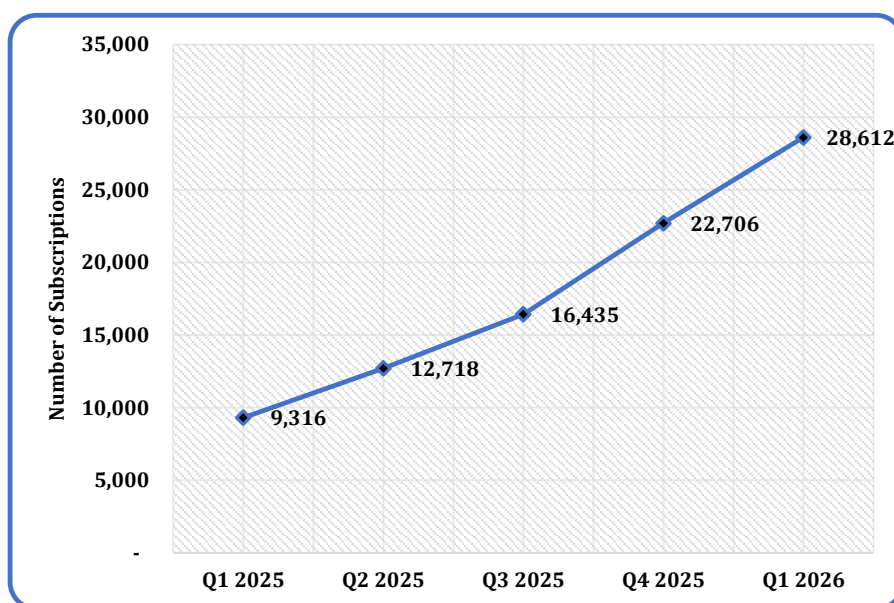


Figure 34: Satellite Total Subscriptions

Table 33: Starlink Total Broadband Subscriptions

Quarter	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Starlink Total Subscriptions	9,316	12,718	16,435	22,706	28,612

3.7.1 Starlink Subscriptions per Price Plan

There were eight (8) different price plans available for Starlink subscribers in Ghana at the end of Q1 2026, namely:

- i. Residential Lite plan
- ii. Residential Plan
- iii. Priority Plan
- iv. Enterprise Plan
- v. Roam Unlimited
- vi. Metered Roam
- vii. Global Roam
- viii. Mobile Priority

At the end of Q1 2026, 13,720 subscriptions were on the Residential plan, indicating a growth rate of 18.93% recorded from the previous quarter (Q4 2025), with a market share of 47.95%.

The Residential Lite Plan also recorded a significant growth rate (35.76%) from 9,666 subscriptions in Q4 2025 to 13,123 subscriptions at the end of the period under review.

Enterprise Plan subscriptions increased by 22.40%, from 558 subscriptions in Q4 2025 to 683 at the end of Q1 2026, while the Priority Plan had a growth of 15.48%.

The quarter under review showed that Starlink’s market in Ghana is becoming increasingly consumer-focused with a strong uptake of residential packages. (Figure 35; Table 34).

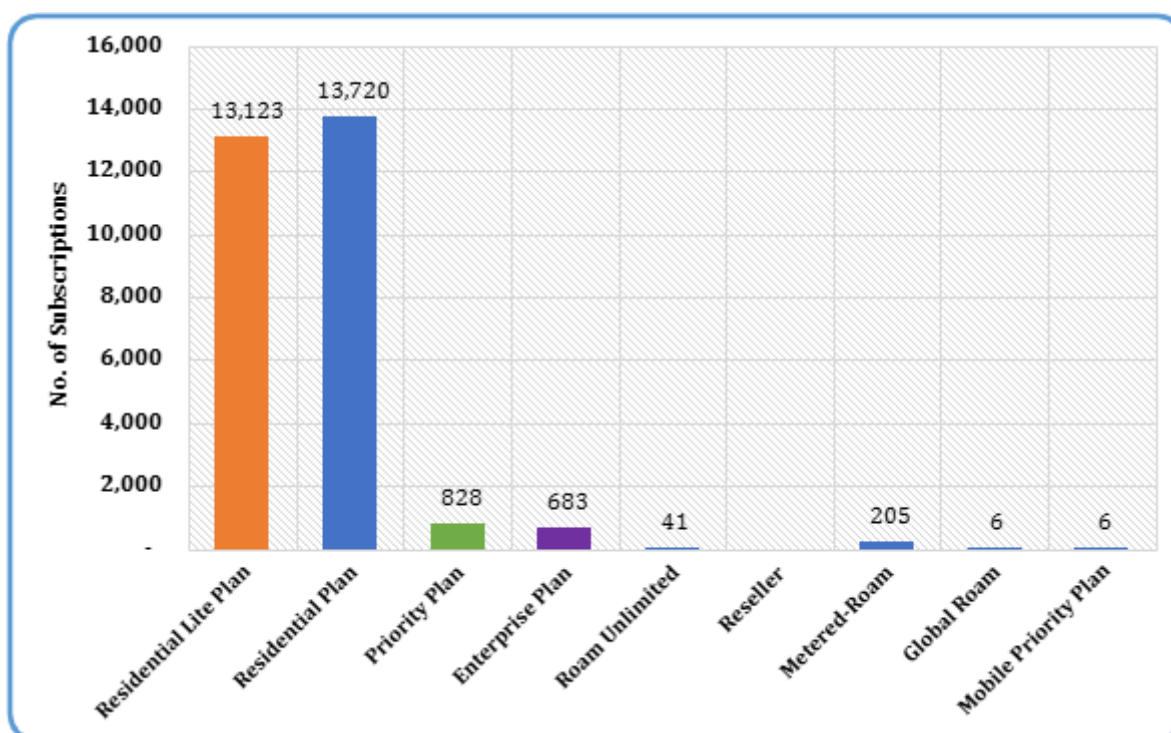


Figure 35: Starlink Subscriptions by Price Plan

Table 34: Starlink Subscriptions by Price Plan

No.	Price Plan	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
1	Residential Lite Plan	1,992	3,793	6,161	9,666	13,123
2	Residential Plan	5,660	7,229	8,718	11,536	13,720
3	Priority Plan	350	725	785	717	828
4	Enterprise Plan	800	653	548	558	683
5	Roam Unlimited	152	109	70	56	41
6	Reseller	102				
7	Metered-Roam	85	166	138	160	205
8	Global Roam	47	28	9	8	6
9	Mobile Priority Plan	128	15	6	5	6
	Total	9,316	12,718	16,435	22,706	28,612

3.7.2 Starlink Subscriptions per Regions

Continually, most regions across the country are recording a growth in subscriptions, apart from Bono. The Greater Accra Region had 10,820 subscriptions, which is the highest, while the Oti Region recorded the least with 65 subscriptions. The average regional growth rate was 32.30%, showing nationwide adoption is expanding. The North East experienced a great increase by 60.87% from 46 subscriptions in Q4 2025 to 74 subscriptions in the quarter under review. The Eastern Region saw a growth of 52.71% compared to the subscriptions of 765 in the previous quarter.

The growth is balanced, suggesting Starlink is expanding beyond major cities in the Country. (Figure 36; Table 35).

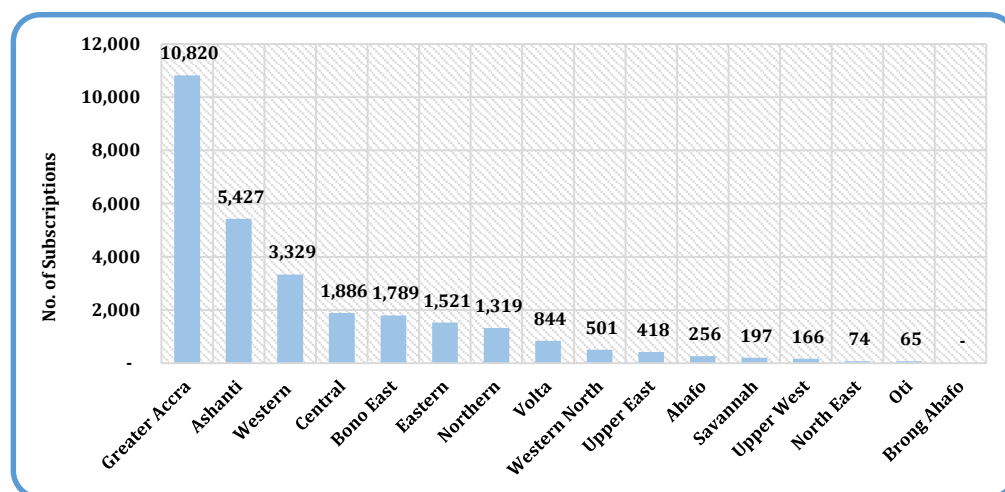


Figure 36: Starlink Subscriptions by Regions

Table 35: Starlink Subscriptions by Regions

Region	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Greater Accra	3,495	4,672	6,381	9,034	10,820
Ashanti	1,948	2,648	3,239	4,253	5,427
Western	964	1,430	1,780	2,455	3,329
Central	546	731	981	1,434	1,886
Bono East	710	824	1,024	1,419	1,789
Eastern	436	566	765	1,157	1,521
Northern	487	701	821	1,093	1,319
Volta	293	455	498	660	844
Western North	94	147	244	341	501
Upper East	128	209	277	331	418
Ahafo	62	91	128	180	256
Savannah	40	65	107	129	197
Upper West	66	79	100	126	166
North East	20	54	54	46	74
Oti	27	44	36	48	65
Bono	-	2	-	-	-
Total	9,316	12,718	16,435	22,706	28,612

4.0 BROADCASTING

4.1 Categories of FM Stations

FM Authorisations are classified into five categories based on purpose, namely:

- Commercial
- Community
- Campus
- Public
- Public (Foreign)

As at the end of Q1 2026, a total of 787 FM stations were authorised. Of these, the majority—569 stations—were commercial, indicating a strong market-driven broadcasting landscape. Community stations accounted for 159, while public service broadcasters remained limited at 31. Campus-based stations numbered 24, and a marginal 4 stations were classified as public (foreign) (Figure 37; Table 36).

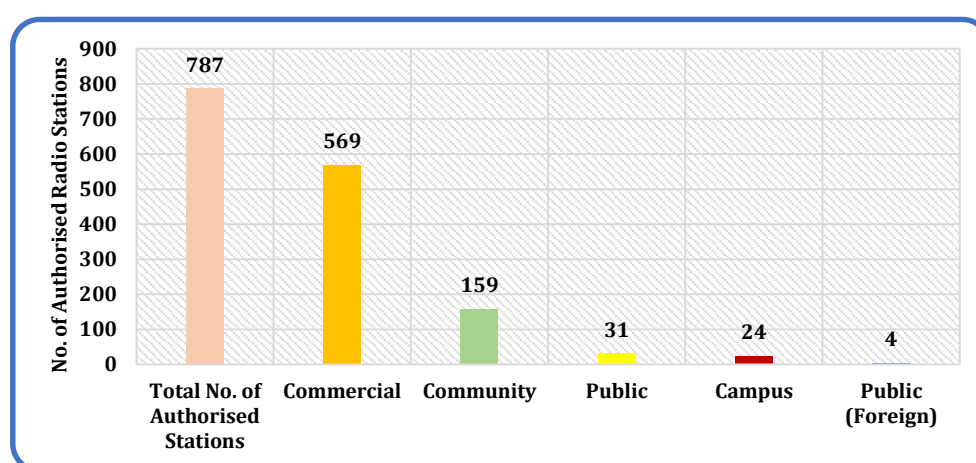


Figure 37: Category by Purpose of Authorised Radio Stations as at Q1 2026

Table 36: Regional Distribution of FM Stations by Purpose as at the end of Q1 2026

Name of Regions	Public	Public (Foreign)	Community	Campus	Commercial
Ashanti	2	1	27	5	81
Bono	1	0	6	3	50
Bono East	2	0	6	0	26
Ahafo	0	0	4	0	17
Central	2	0	19	4	46
Eastern	2	0	21	1	28
Greater Accra	2	2	18	2	66
Northern	3	0	8	1	36
Savannah	3	0	6	0	10
North East	1	0	3	0	9
Upper East	2	0	12	3	25
Upper West	2	0	11	2	12
Volta	3	0	5	1	41
Oti	1	0	4	0	16
Western	2	1	8	2	78
Western North	3	0	1	0	28
Total	31	4	159	24	569

4.2 Authorised and Operational Frequency Modulation (FM) Radio Stations

As at the end of Q1 2026, the total number of authorised FM radio stations in Ghana stood at 787. Of these, 563 stations were operational, while 224 had yet to commence operations. Compared to Q4 2025, the number of operational stations remained same, indicating that, there was no expansion in active broadcasting capacity during the quarter under review. (Figure 38; Table 37)

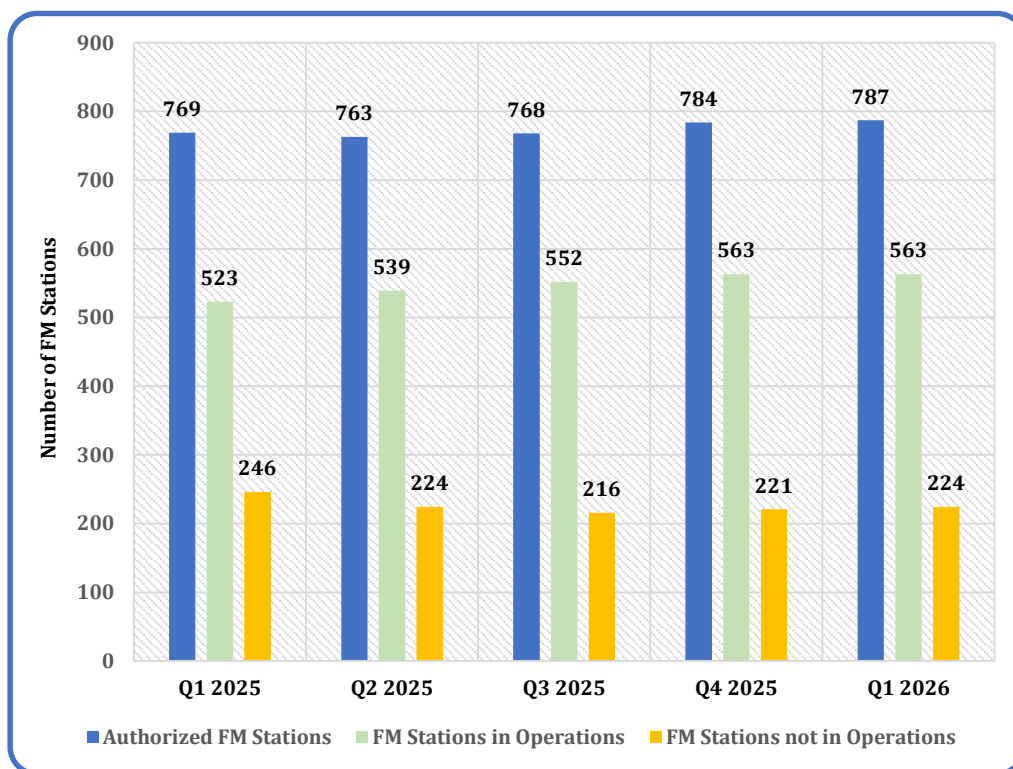


Figure 38: Trend in Authorized and Operational FM Radio Stations (Q1 2025 - Q1 2026)

Table 37: Trend in Authorised and Operational FM Radio Stations (Q1 2025 - Q1 2026)

	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Authorised FM Stations	769	763	768	784	787
FM Stations in Operation	523	539	552	563	563
FM Stations not in Operation	246	224	216	221	224

4.3 Regional Distribution of Authorised, Operational and Non-Operational FM Stations

The distribution of authorised FM stations across regions remains uneven, with the Ashanti Region recording the highest concentration at 116 stations (14.74% of the national total). In contrast, the North-East Region accounted for the lowest share, with 13 stations (1.65%) (Figure 39; Table 38).

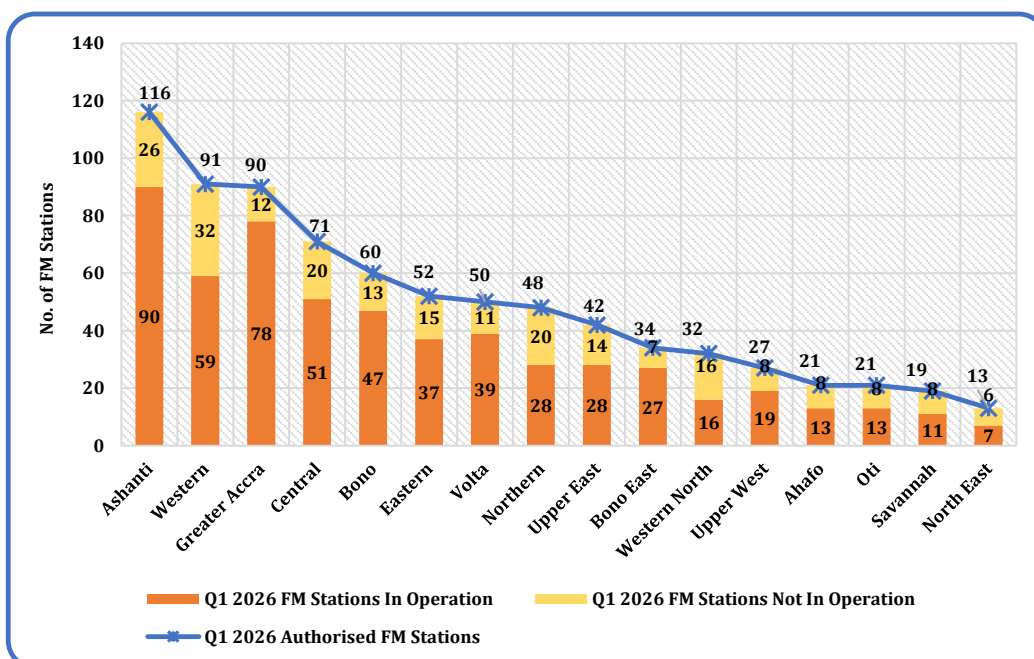


Figure 39: Regional Distribution of Authorised, On-Air and Off-Air FM Stations as at the end of Q1 2026

Table 38: Regional Distribution of FM Stations as at the end of Q1 2026

Name Of Regions	Q1 2026 Authorised FM Stations	Q1 2026 FM Stations In Operation	Q1 2026 FM Stations Not In Operation
Ashanti	116	90	26
Western	91	59	32
Greater Accra	90	78	12
Central	71	51	20
Bono	60	47	13
Eastern	52	37	15
Volta	50	39	11
Northern	48	28	20
Upper East	42	28	14
Bono East	34	27	7
Western North	32	16	16
Upper West	27	19	8
Ahafo	21	13	8
Oti	21	13	8
Savannah	19	11	8
North East	13	7	6
Total	787	563	224

4.4 Authorised Television Stations

The total number of Authorised TV Stations as at the end of Q1 2026 was 178, out of which 132 were operational during the quarter under review, indicating 74.16% of the total number of Authorised TV stations in Ghana. (Figures 40 & 41; Table 39)

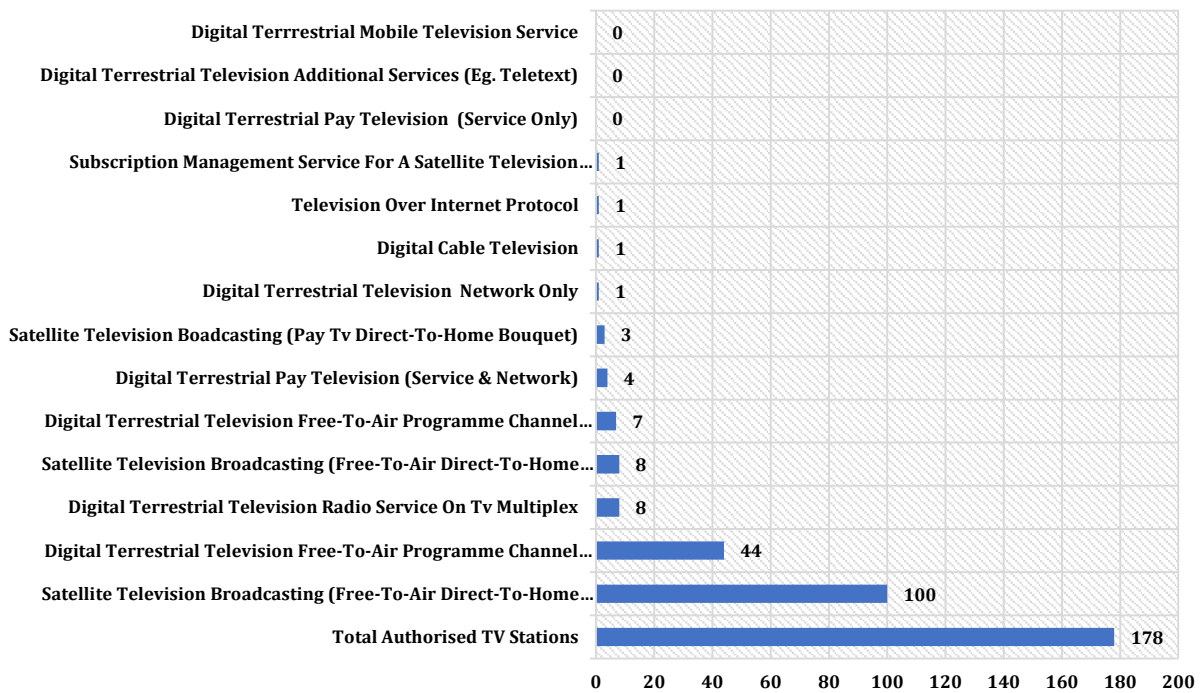


Figure 40: Authorised TV Stations as at Q1 2026

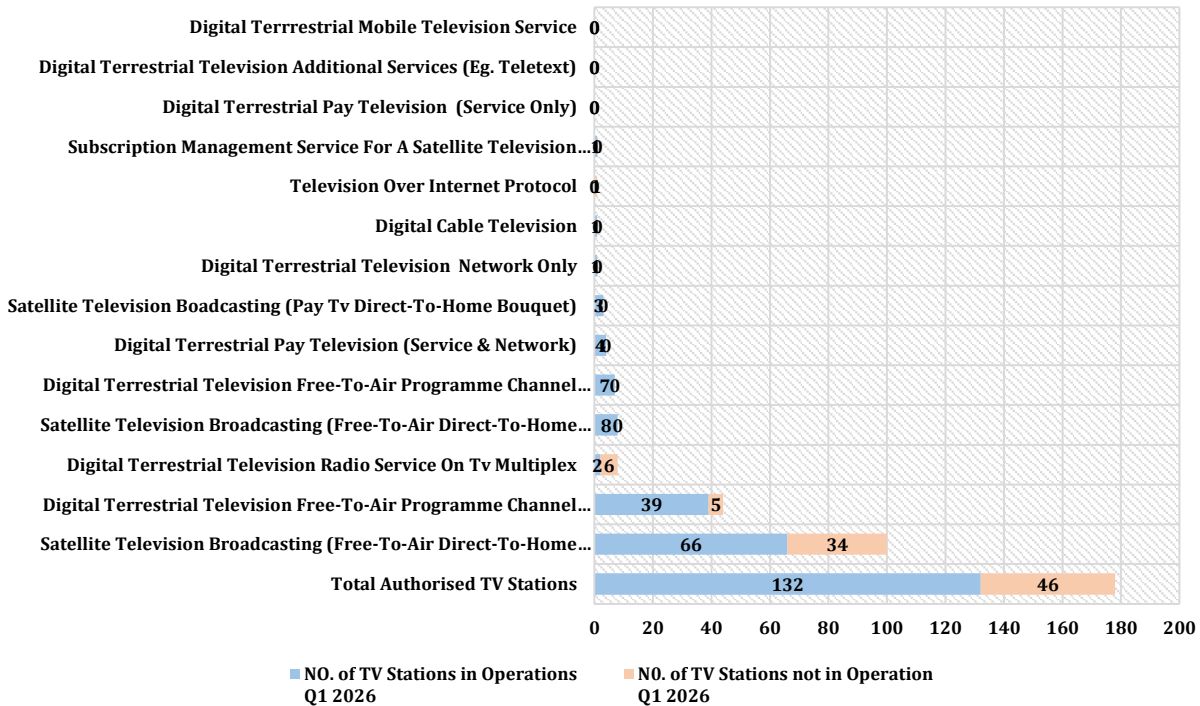


Figure 41: Distribution of Types of Services (On -Air and Off-Air TV Stations) as at the end of Q1 2026

Table 39: Authorised TV Stations as at the end of Q1 2026

Type of Television Service	Authorised TV Stations		No. of TV Stations in Operation (Q1 2026)	No. of TV Stations not in Operation (Q1 2026)
	End of Q4 2025	End of Q1 2026		
Digital Terrestrial Free-To-Air Television Programme Channel (Nationwide Coverage)	43	44	39	5
Digital Terrestrial Free-To-Air Television Programme Channel (Regional Coverage)	7	7	7	0
Digital Terrestrial Pay Television (Service only)	0	0	0	0
Digital Terrestrial Pay Television (Service and Network)	4	4	4	0
Digital Terrestrial Television (Network only)	1	1	1	0
Digital Terrestrial Radio Service on TV Multiplex	8	8	2	6
Satellite Television Broadcasting (Pay TV Direct-To-Home Bouquet)	3	3	3	0
Satellite Television Broadcasting (Free-To-Air Direct-To-Home Bouquet)	8	8	8	0
Satellite Television Broadcasting (Free-To-Air Direct-To-Home Single Channel)	101	100	66	34
Digital Terrestrial Television Additional Services (e.g. Teletext, etc.)	0	0	0	0
Digital Terrestrial Mobile Television Service	0	0	0	0
Digital Cable Television	1	1	1	0
Television over Internet Protocol (Pay TV)	1	1	0	1
Subscription Management Service for a Satellite Television Broadcasting (Pay TV Direct-To-Home Bouquet)	1	1	1	0
Total	178	178	132	46

Source: NCA, 2025

Disclaimer:

The National Communications Authority has been diligent to ensure the data in this bulletin are accurate. However, the Authority is not liable for inconsistencies, errors, and gaps in any data or information contained in this bulletin, which is dependent upon the various licensees data submissions to the Authority.

NCA CONTACTS AND PRESENCE COUNTRYWIDE

The Authority currently has eight (8) regional offices to support its operations. Their addresses are listed below

- **Accra, Head Office**

National Communications Authority,
No. 6 Airport City
KIA, Accra, Floors 1-2, 4-9
GL-126-7029
P. O. Box CT 1568, Cantonments, Accra, Ghana
Tel: +233 (0)30 277 1701, +233 (0)30 277 6621,
+233 (0) 50 145 1522 - 3
Email: info@nca.org.gh
Website: www.nca.org.gh

- **Bolgatanga Office**

National Communications Authority,
Zorbisi Zaare Residential Area in Bolgatanga
Municipality
UB-0034-8536
Private Mail Bag, Bolgatanga,
Upper East Region
Tel: +233 (0)38 202 1141
Email: complaints.bolgatanga@nca.org.gh

- **Ho Office**

National Communications Authority,
Plot No. 75, Stadium Road, Kabore Junction, Ho
VH-0006-0554
P. O. Box HP1576, Ho,
Volta Region
Tel: +233 (0)36 202 6339
Email: complaints.ho@nca.org.gh

- **Koforidua Office**

National Communications Authority,
Plot No. 31, Sector 5,
Block C along the Galloway Road
EN-001-4621
Private Mail Bag, Koforidua,
Eastern Region
Tel: +233 (0)34 202 8380/ 34 202 8382
Email: complaints.koforidua@nca.org.gh

- **Kumasi Office**

National Communications Authority,
Fuller Road, Danyame, Kumasi
AK-063-2250
P. O. Box KS 10768, Kumasi,
Ashanti Region
Tel: +233 (0)32 202 0014/ (0)32 202 0018
Email: complaints.kumasi@nca.org.gh

- **Sunyani Office**

National Communications Authority,
House No. 83, North Nkwabeng
BS-0032-6614
P. O. Box SY125, Sunyani,
Bono Region
Tel: +233 (0)35 202 7564
Email: complaints.sunyani@nca.org.gh

- **Takoradi Office**

National Communications Authority,
Bakado, 3km Away from the Prisons (R.S.K.
Barnes Ct, Sekondi – Takoradi)
WS-014-8190
P. O. Box SL 409, Sekondi,
Western Region
Tel: +233 (0) 31 20 28069 / 31 20 28063
Email: complaints.takoradi@nca.org.gh

- **Tamale Office**

National Communications Authority,
Watherson Residential Area, Plot No. 3 & 4,
Tamale
NT-0027-8191
P. O. Box TL 1590, Tamale,
Northern Region, Ghana
Tel: +233 (0)37 202 8105/ 37 202 0104
Email: complaints.tamale@nca.org.gh

