AN OVERVIEW OF TELECOMMUNICATIONS IN ZIMBABWE

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By:
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General Country Background

- Zimbabwe is a landlocked country situated in the southern part of Africa.
- The country has land area of 390 590 square km.
- There are 12.6 million people according to the Inter-Census Demographic Survey of 2007.
- Harare the largest city has 2 million people.
- 38% of the population are in urban areas.
- Telecommunication service usage is mainly in urban areas.
Telecommunications Infrastructure

- A total of 9 Mobile switching centres
- 2 Trunk switches for the fixed network
- A total of 880 Base stations
  - A few base stations mainly in Harare offering 3G, Edge, GPRS
- 5 International Gateways
- 5 radio terrestrial 2 fibre optic links to regional countries.
Access Technologies Used

- GSM
- WIMAX
- CDMA
- Fibre
- copper based technologies such as ADSL
Licensing Regime

- In a migratory stage from service specific to converged, and technology neutral regime.
- This has seen the introduction of new services such as 3G, and VoIP.
- This has seen upgrading of licences as follows:
  - mobile upgraded to offer 3G services
  - Fixed upgraded to offer full mobile services
  - Internet class B upgraded to offer VoIP services.
## Industry Structure

<table>
<thead>
<tr>
<th>Type of Operator</th>
<th>Number of licensees</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSTN</td>
<td>1</td>
</tr>
<tr>
<td>Mobile</td>
<td>3</td>
</tr>
<tr>
<td>Internet Access</td>
<td>11</td>
</tr>
<tr>
<td>Public Data</td>
<td>2</td>
</tr>
<tr>
<td>Internet Service Providers</td>
<td>17</td>
</tr>
</tbody>
</table>
Market Structure: Fixed

- One fixed public operator.
- Offers local, regional and international voice telephone services.
- Has 386,000 subscribers
- About 50% of the lines are in Harare alone
- 17% of the lines are in rural areas
- 92% of the lines are digitalized
**Market Structure: Mobile**

- There are three mobile operators: Econet, Net one and Telecel
- The subscriber base for the operators:
  - Econet 3 200 000
  - Telecel 600 000
  - Net*One 500 000
- Only three percent of the above subscribers are post paid.
- All mobile operators are 100% digitalized
- Econet offers GPRS, EDGE, and 3G services
- Other mobile operators are in the process of rolling out above mentioned services.
Market Structure: Public Data

- The operators are issued with licenses to offer point to point or point to multipoint data connectivity.
- They provide national and international data services as well as local access data services.
- Operators NOT allowed to provide any basic telecommunications service
- There are two public data operators (excluding those that also offer internet access).
  - These are Broadlands and Qualtime.
Market Structure: Internet Access

- The licensees are issued with either Class A or Class B.
- Class A allows VoIP services
- Class B has combined public data and internet.
- There are 10 internet Class A and 1 Class B operator.
- Internet users are estimated to be 1,4 million
- Public mobile internet subscribers are 20 000.
## Subscriber Statistics

(Number of subscribers in `000)

<table>
<thead>
<tr>
<th></th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net One</td>
<td>215</td>
<td>331</td>
<td>398</td>
<td>440</td>
<td>500</td>
</tr>
<tr>
<td>Econet</td>
<td>477</td>
<td>648</td>
<td>678</td>
<td>2110</td>
<td>3200</td>
</tr>
<tr>
<td>Telecel</td>
<td>156</td>
<td>245</td>
<td>257</td>
<td>451</td>
<td>600</td>
</tr>
<tr>
<td>Tel One</td>
<td>335</td>
<td>344</td>
<td>346</td>
<td>385</td>
<td>386</td>
</tr>
</tbody>
</table>
## Internet Service Indicators

<table>
<thead>
<tr>
<th>Service</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>No of Leased line subscribers</td>
<td>53,000</td>
</tr>
<tr>
<td>No of internet dial-up subscribers</td>
<td>26,100</td>
</tr>
<tr>
<td>Mobile broadband subscribers</td>
<td>20,000</td>
</tr>
<tr>
<td>Incoming international bandwidth</td>
<td>290 Mbps</td>
</tr>
<tr>
<td>Outgoing international bandwidth</td>
<td>215 Mbps</td>
</tr>
<tr>
<td>Estimated number of PCs</td>
<td>895,000</td>
</tr>
<tr>
<td>Internet users</td>
<td>1.4 million</td>
</tr>
</tbody>
</table>
## Employment Figures

Number of people employed in the telecommunication industry

<table>
<thead>
<tr>
<th></th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile Staff</td>
<td>681</td>
<td>693</td>
<td>905</td>
<td>777</td>
<td>850</td>
</tr>
<tr>
<td>Fixed Staff</td>
<td>2951</td>
<td>3107</td>
<td>2491</td>
<td>2347</td>
<td>2350</td>
</tr>
</tbody>
</table>
Tariffs

- All telecommunications tariffs have to be cost based
- All tariffs should be approved by the regulator before they are implemented
- Fixed calls are 15 cents per three minutes
- Mobile calls are 24 cents per minute
- Short Message Service (SMS) are 9 cents per message