



TELECOMMUNICATIONS STATUS IN ZIMBABWE

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Background

- Postal and Telecommunications Regulatory Authority of Zimbabwe (POTRAZ)
 - Established by the Postal and Telecommunications Act of 2000.
 - Started its operations in March 2001
 - POTRAZ situated at Emerald Business Park, No. 30 The Chase Harare
- Legislation brought about a new institutional framework for telecommunications:
 - Liberalized the sector
 - Introduced distinct roles of government, regulator, operators, and consumers.

POTRAZ MANDATE

- Ensuring provision of sufficient domestic and international telecommunication services
- Ensuring provision of services at rates consistent with the provision of an efficient and continuous service
- Promote the development of the sector services in accordance with:
 - Practicable recognised international standards
 - Public demand

POTRAZ MANDATE cont'd

- Furthers the advancement of technology
- Represents Zimbabwe internationally in matters relating to the sector
- Establishes, approves or controls the National Numbering plan
- Manages the Radio Frequency Resource
- Advises the Government on all matters relating to the telecommunication services

General Country Background

Location	Southern Africa
Area	390 590 square Km
Population	12.6 Million
Population Distribution	38% Urban: 62% Rural

- Telecommunication service usage is mainly in urban areas.

MARKET STRUCTURE FIXED

- One fixed public operator (TelOne.)
- Offers local, regional and international voice telephone services.
- Has 337 881 subscribers (Lines)
- The fixed teledensity is 2.68%.
- Of these, 61 % are in the capital Harare.
- 53% are residential lines.
- 84 % of the lines are connected to the digital exchange.
- 17 % of the lines are in rural areas.

MARKET STRUCTURE

MOBILE

- There are three mobile operators: Econet, Net One and Telecel
- The current subscriber base as at 30 June 2011 for the operators:

Econet	5,521,000
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Telecel	1,297,000
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Net One	1,349,000
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- Mobile teledensity stands at 64.85 %.
- All mobile operators are 100% digitalized
- All the three operators offer 2G, GPRS, EDGE, and 3G services.
- Public mobile internet subscribers are currently 1.5 million.

MARKET STRUCTURE INTERNET ACCESS

- The licensees are issued with either Class A or Class B.
- Class A allow VoIP services.
- Class B does not offer VoIP services.
- There are 11 Class A Internet Access Providers.
- There are 2 Class B Internet Access Providers.
- Internet users are estimated to be 1.6 million.
- Internet penetration rate is currently 12.7 %.

MARKET STRUCTURE GENERAL

Type of Operator	Number of licenses'
PSTN	1
Mobile	3
Internet Access Class A	11
Public Data	2

SECTOR PERFORMANCES

(Number of subscribers in `000)

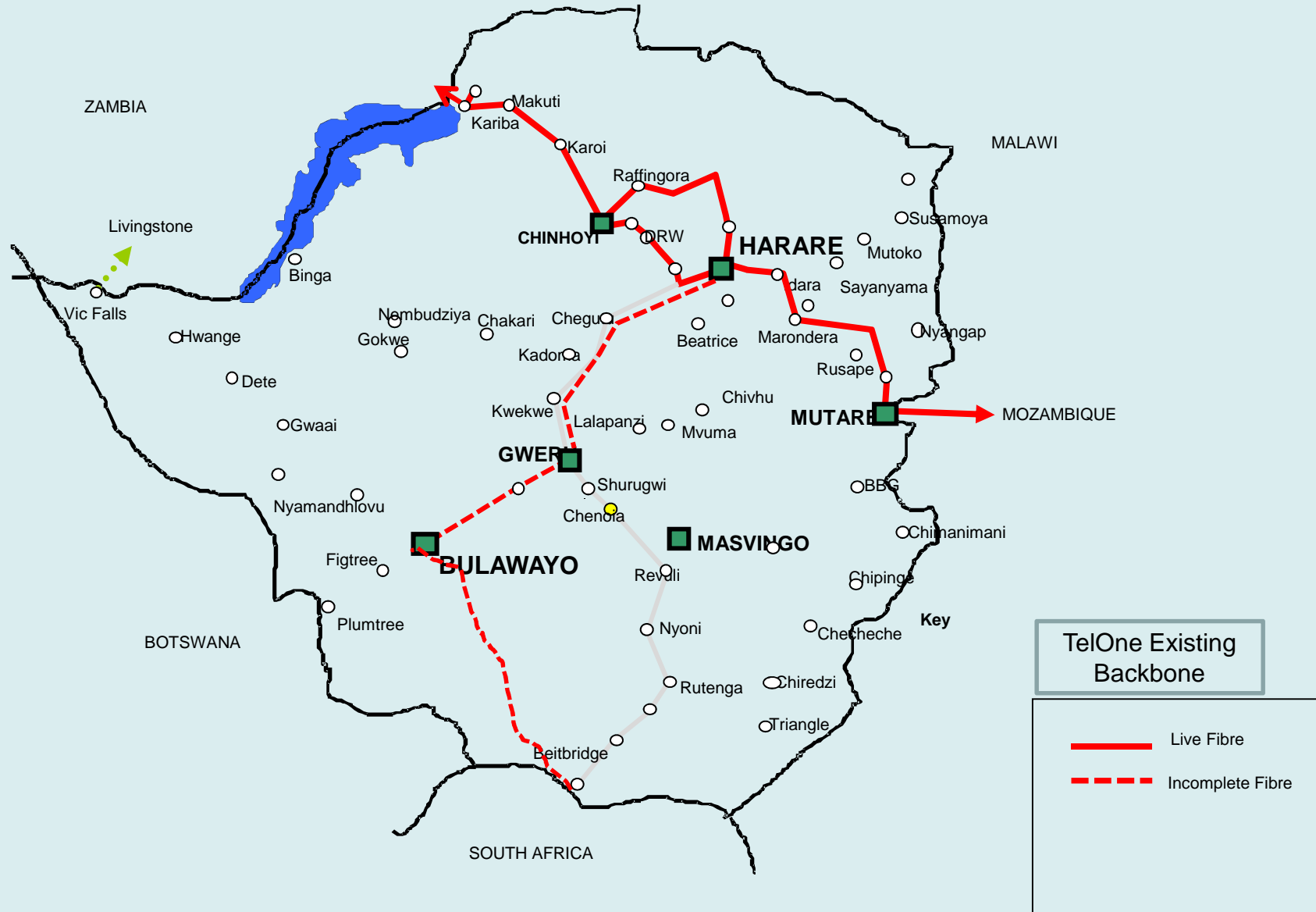
	2007	2008	2009	2010	2011
NetOne	331	418	347	1,200	1,349
Econet	649	990	3,200	5,200	5,500
Telecel	246	248	451	1,300	1,297
Tel One	345	364	385	378	338

ICT INFRASTRUCTURE

- The country is now linked to the undersea cables as follows:

Operator	Backbone fibre Link	capacity	Status
Powertel	• Harare-BYO- Plumtree-Botswana	STM 16	Completed
	• Harare- Mutare - TDM	STM 16	Complete
Econet/Liquid Telecom	• Harare-Masvingo-Beitbridge- South Africa	STM 64	Complete
	• Harare-BYO- Beitbridge – South Africa	STM 64	Work in progress
Tel One	• Harare-Mutare-Mozambique	STM 64	Complete
	• Harare-Mazoe-Chinhoyi	STM 16	Complete
	• Harare-Chinhoyi-Makuti-Chirundu-Zambia	STM 16	Complete
	• Masvingo-Beitbridge-South Africa	STM 64	Work in progress
	• Harare-Gweru- Bulawayo-Beitbridge	STM 64	
Africom	• Harare-Mutare-Mozambique	-	Work in progress

- Zimbabwe Telecommunications Backbone



PowerTel Infrastructure

Africom Infrastructure

Econet/Ecoweb Infrastructure

Telecel

Proposed Zim Backbone

National Backbone

- Zimbabwe Telecommunications Backbone



TelOne Infrastructure

Africom Infrastructure

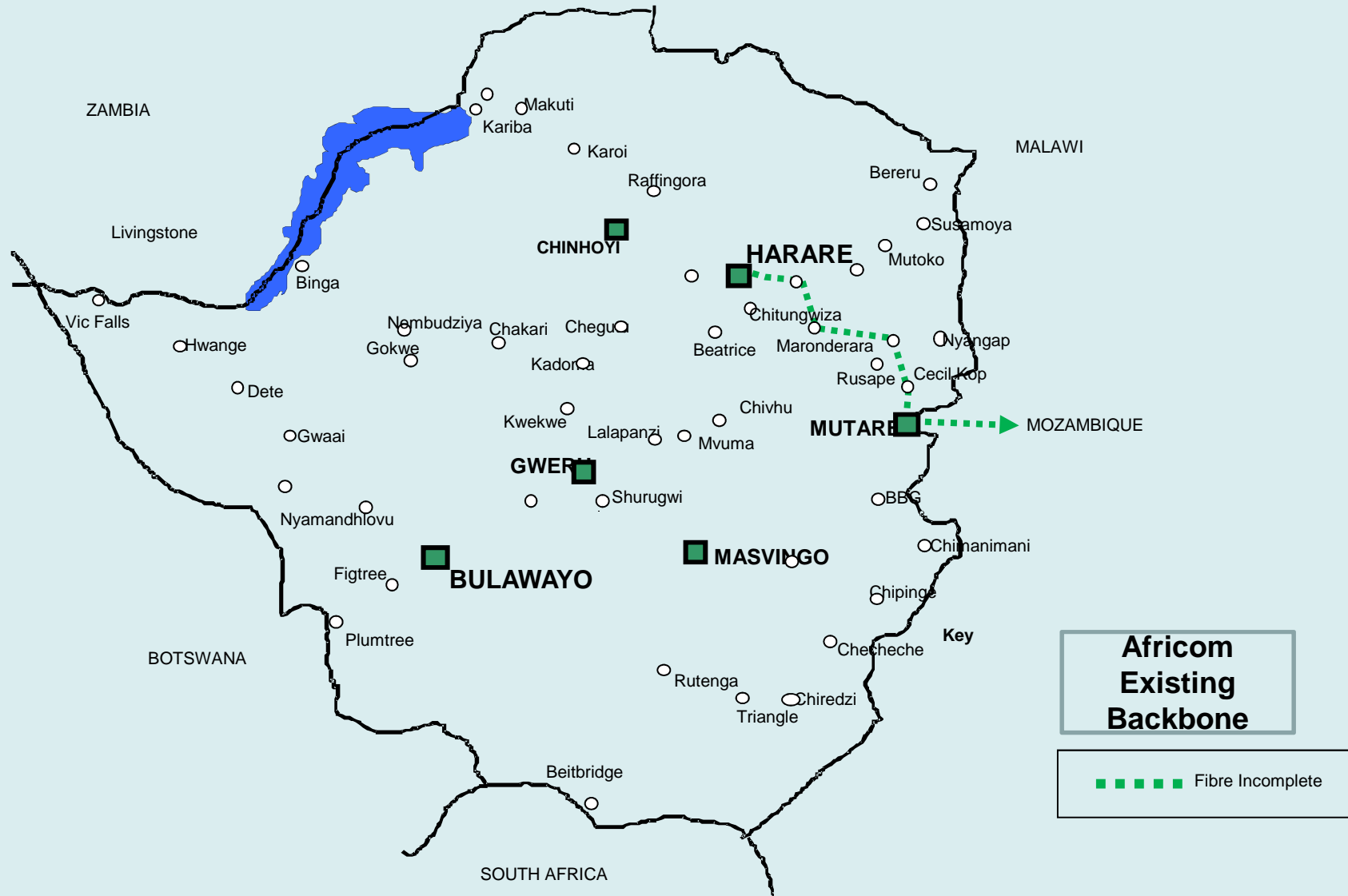
Econet/Ecoweb Infrastructure

Telecel

Proposed Zim Backbone

National Backbone

- Zimbabwe National Infrastructure Backbone



Africom Existing Backbone

..... Fibre Incomplete

Powertel Infrastructure

TelOne Infrastructure

Econet/ECOWEB Infrastructure

Telecel

Proposed Zim Backbone

National Backbone

- Zimbabwe National Infrastructure Backbone



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Powertel Infrastructure

TelOne Infrastructure

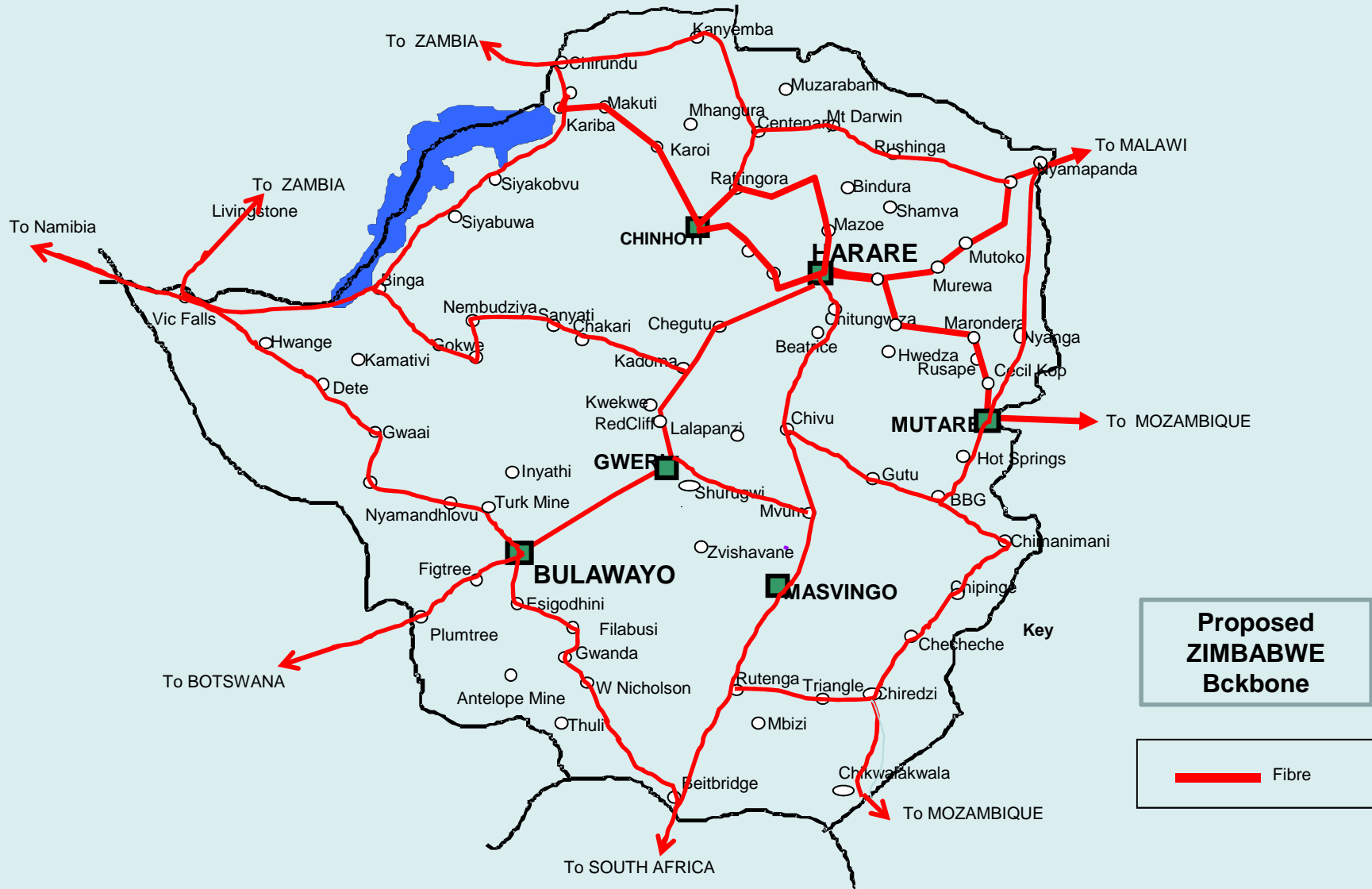
Econet/Liquid Infrastructure

Africom Infrastructure

Proposed Zim Backbone

National Backbone

- Zimbabwe Telecommunications Backbone



PowerTel Infrastructure

TelOne Infrastructure

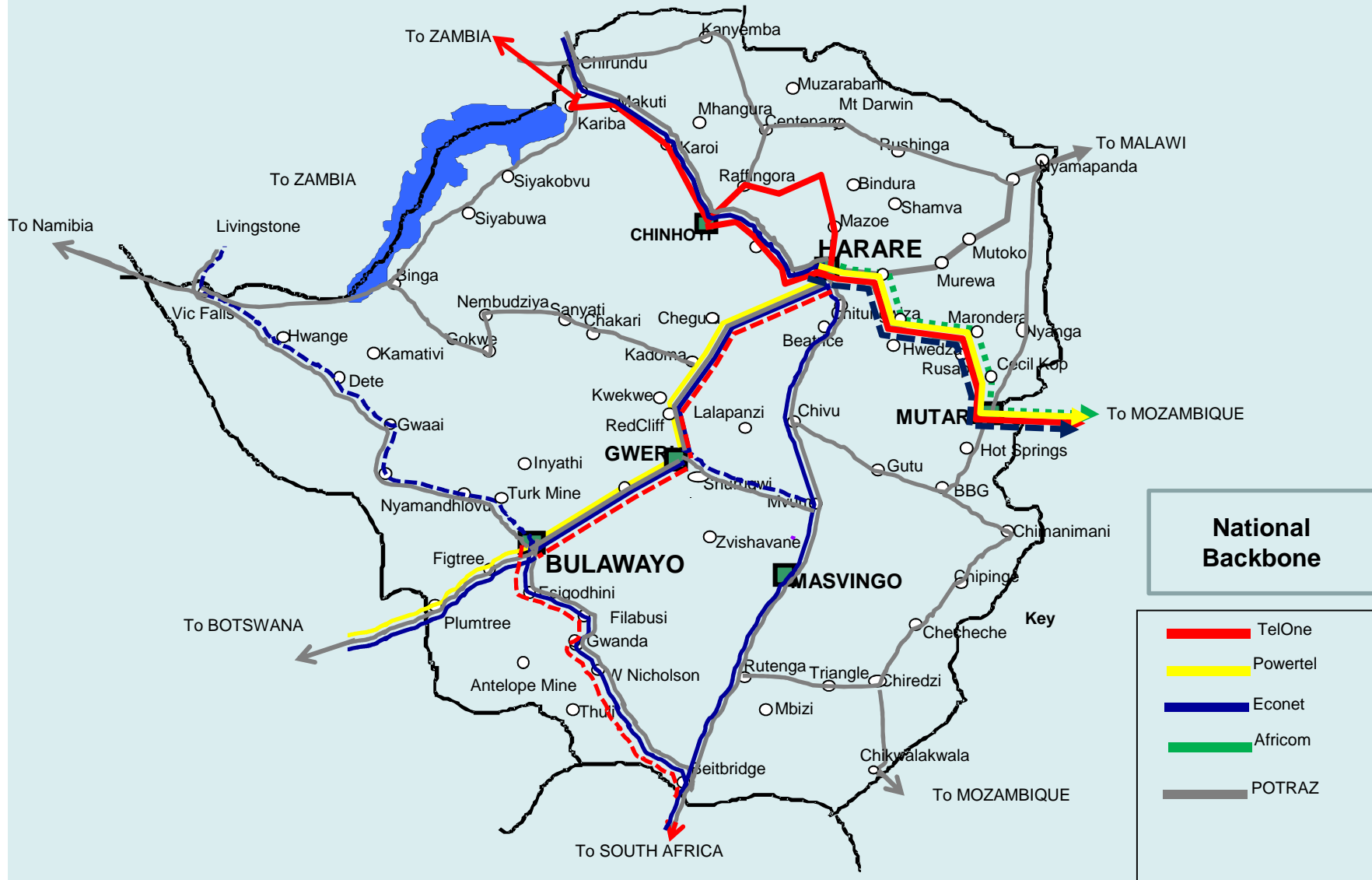
Econet Infrastructure

Telecel

Africom Infrastructure

Natioal Backbone

- Zimbabwe Telecommunications Backbone



Powertel Infrastructure

TelOne Infrastructure

Econet/ECOWEB Infrastructure

Telecel

Africom Infrastructure

Redundancy

- Complementary Systems
 - Multi-operator scenario
 - Traditional Earth Stations
 - VSAT HUBS
 - Terrestrial Microwave
 - Mobile Satellite Systems

Thank You

Tatenda