

**9th World Telecommunication/ICT Indicators
Meeting (WTIM-11)
Mauritius, 7 - 9 December 2011**



Information document

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English

SOURCE: Malawi Communications Regulatory Authority, Malawi

TITLE: Malawi ICT Sector Overview



Presentation Outline

- Malawi Profile
- Legal and Policy Framework
- Regulatory Framework
- ICT sector Performance
- MACRA Initiatives

The MACRA logo is located in the bottom right corner of the slide. It consists of the word "macra" in a red, lowercase, sans-serif font, positioned above a red icon of a pair of scales of justice.

COUNTRY PROFILE

INDICATOR	DATA
<i>Population</i>	13.5 million (expected to reach 20 million in 2020)
<i>Density</i>	110/ km ²
<i>Country size</i>	118,484 km ² (20.6 % water)
<i>% in rural areas</i>	80 %
<i>Capital City</i>	Lilongwe
<i>Currency</i>	Malawi Kwacha (1 USD = MK 150)
<i>Climate</i>	Sub-tropical (dry and strongly seasonal)



Policy & Legal Framework

- The Communications Sector Policy Statement (1998) and the Communications Act of 1998 are the prevailing legal instruments in the ICT Sector.
 - MICE is the overall ministry that oversees the sector including providing the enabling environment for ICT development.



Regulatory Framework

- The Malawi Communications Regulatory Authority (MACRA) was established under section 3 of the Communications Act (Cap 68:01 of the Laws of Malawi).
- MACRA's Operations commenced in 2000 with a mandate covering the four basic communication sectors namely;
 - Telecommunications;
 - Broadcasting;
 - Postal services; and
 - Management of radio frequencies (spectrum).
- MACRA is an independent regulator, reporting to Parliament through the Ministry of Information and civic Education. However the ultimate authority in terms of decision making rests with the Board of Directors appointed by the President .



Regulatory Mandate and Duties

In fulfilling its mandate from the Communications Act, MACRA undertakes the following duties:

- Ensuring the provision of reliable & affordable communication services.
- Protecting the interests of consumers.
- Promoting efficiency and competition.
- Encouraging the introduction of new communications services.
- Promoting research and development.
- Serving as a policy advisory body to the Ministry responsible for communications.



Regulatory Mandate and Duties cont'd...

- Fostering the development of communications services and technology in accordance with recognised international standards.
- Promoting universal access / service.
- Regulating fair access to scarce and vital resources (e.g. radio spectrum).



ICT Players

CATEGORY	LICENCES TO DATE
Telecommunications	
<i>Fixed line services</i>	2 (MTL & ACL)
<i>Mobile (cellular) services</i>	4 (TNM ,Airtel, Gmobile and Celcom)
<i>Carrier of Carriers</i>	1 (ESCOM)
<i>International Gateway</i>	4 (TNM, Airtel, Maren, MTL)
<i>Internet Service Provision (ISP)</i>	12 (operational)
<i>vSAT</i>	154
Broadcasting	
<i>Radio Stations</i>	25
<i>TV</i>	4



ICT Players ..cont'd...

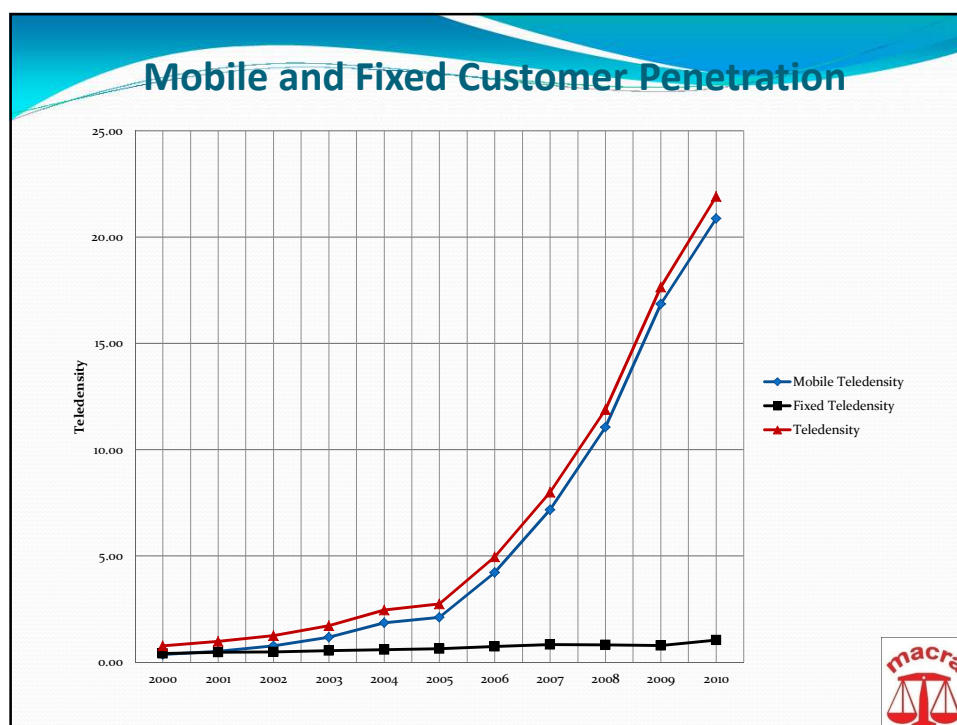
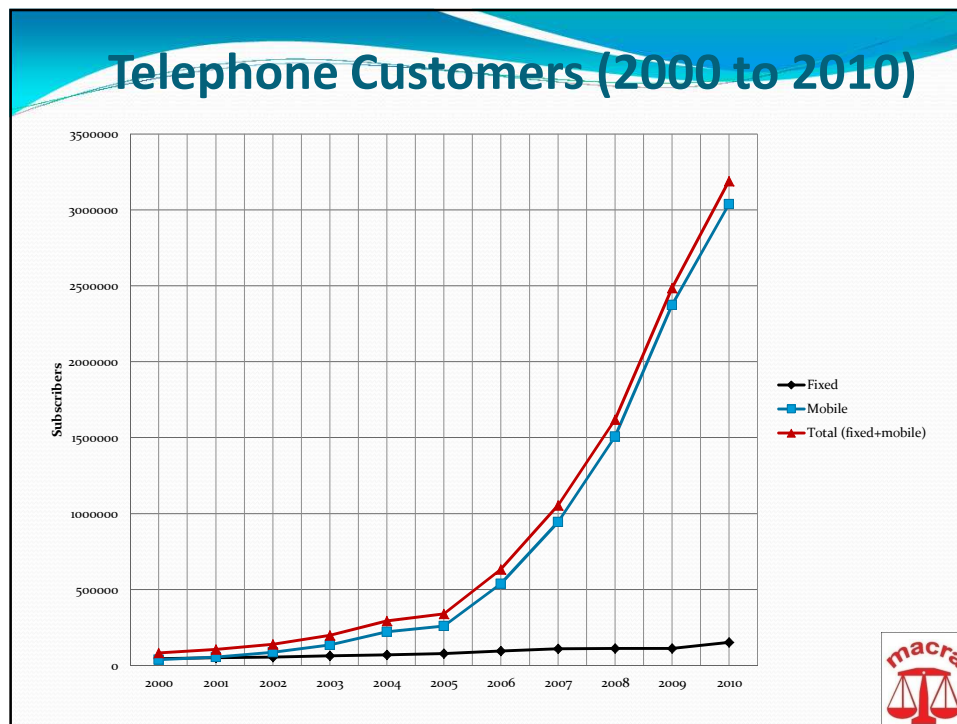
CATEGORY	LICENCES TO DATE
<i>Postal Services</i>	
<i>Public Postal operator</i>	1
<i>International Commercial Couriers</i>	7
<i>Domestic (National) Commercial Couriers</i>	6
<i>Domestic (Inter-City) Commercial Couriers</i>	2



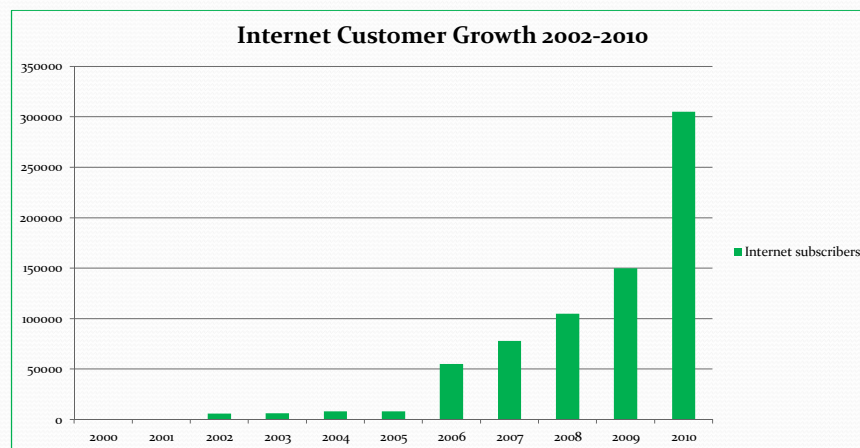
ICT Indicators (DEC 2010)

PARAMETER	STATISTICAL INDICATOR
<i>Teledensity</i>	21.92 %
<i>Fixed Telephone Customers</i>	152,108
<i>Fixed Teledensity</i>	1.05%
<i>Mobile Customers</i>	3,037,469
<i>Mobile Teledensity</i>	20.87 %
<i>Internet Customers</i>	305,000
<i>Internet Teledensity</i>	2.26 %
<i>Population covered by mobile signal</i>	84 %

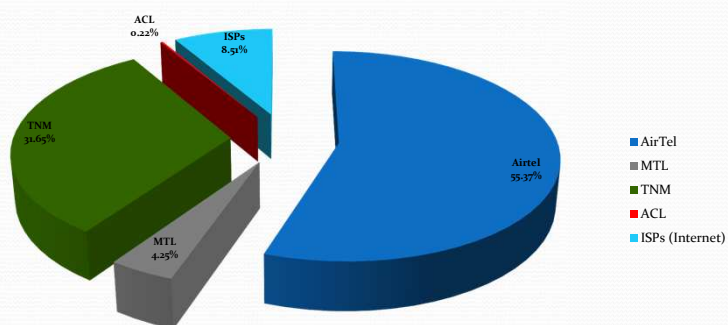




Internet Customer Growth

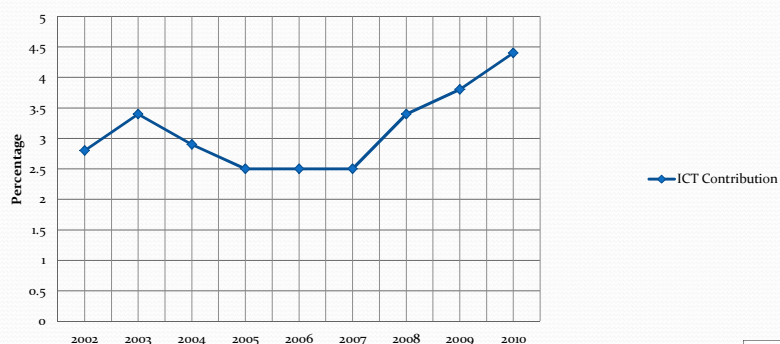


Telecoms Market Share (end 2010)



Telecom Sector Contribution to GDP

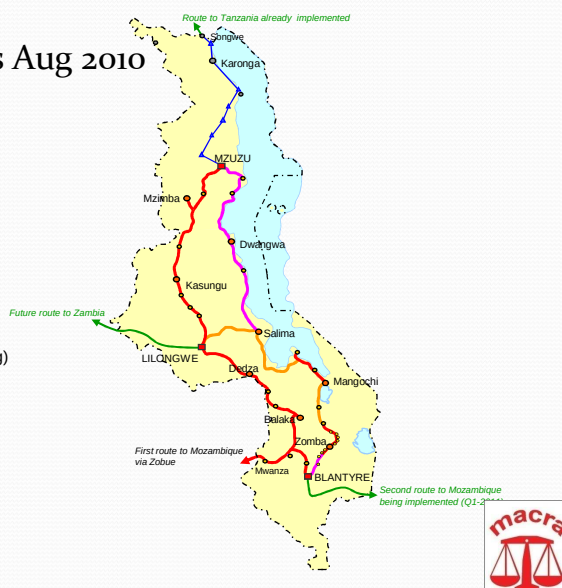
Telecom Contribution To GDP

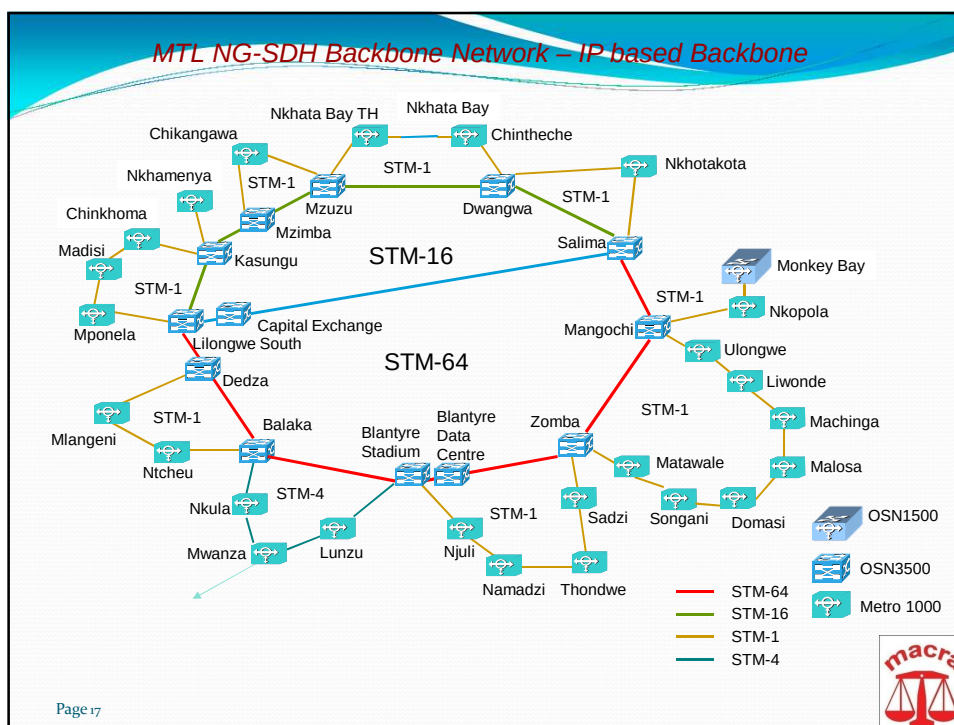


Broadband Initiatives

• Backbone Fiber status Aug 2010

- LEGEND**
- Regional capital
 - Main backbone node
 - Minor Backbone Node
 - Optical fibre backbone (completed or existing)
 - Optical fibre backbone (under construction)
 - Optical fibre backbone (to be completed)
 - 100Mbps to Tanzania and Mozambique
 - Microwave backbone route
 - ▲ Microwave repeater





Broadband Initiatives

- Next Generation Network
 - Implementation started in Q3 of 2010
 - To be completed by Q1 of 2012
- The e-government
 - So far automated the processing of driving licences and passports.
 - The e-government is on going
- Government Wide Area Network (GWAN)
 - GWAN will connect all government departments once completed
- 3G
 - Both active mobile operators are offering 3G services
 - Concentrated in major towns currently



Broadband Initiatives

- The Regional Infrastructure Services Project
 - To roll out terrestrial fiber from Lilongwe to a landing point in Tanzania
 - To establish a Virtual Landing Point in Lilongwe
 - Funded by the world bank
- WiMAX and WiFi- Being used by most of the ISPs
- Universal Access
 - Establishing internet points of presence in rural areas
 - Currently funded by the world bank but soon to be funded from the Universal Access fund



MACRA Initiatives

- Converged (Unified) licencing
 - Allows Telecom operators to provide various services under one licence (i.e voice, data, video) over a single infrastructure
- Review of the communications ACT
- Sector specific regulations
- Connect a constituency Telecenter project
 - The aim is to provide access to ICTs to all constituencies at the end of the project
- Connect a post office Telecenter project
 - The aim is to provide access to ICTs to as many post offices as possible



MACRA Initiatives ..cont'd..

- Consolidated ICT regulatory Management System
 - For efficient and effective monitoring of the telecoms industry
- Global Monitoring System
 - For monitoring QOS for postal services
- Broadcasting content monitoring system
 - For monitoring TV and radio broadcasting content
- Digital Migration
 - A move from analog to digital broadcasting
 - Spectrum to be freed



Thank you