

**8th World Telecommunication/ICT Indicators
Meeting (WTIM-10)**
Geneva, Switzerland, 24 - 26 November 2010



Information document

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English

SOURCE: Malawi Communications Regulatory Authority, Malawi

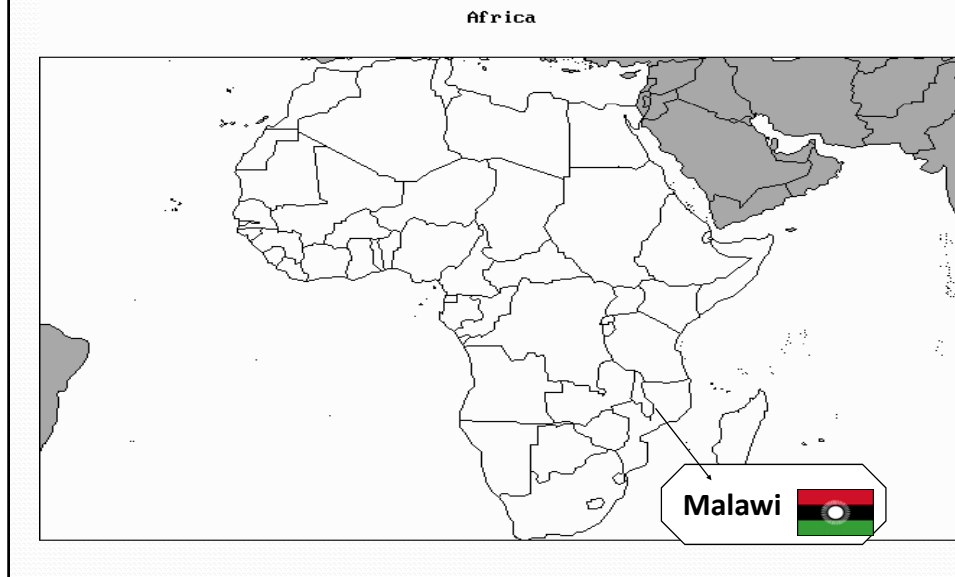
TITLE: Malawi Country Report



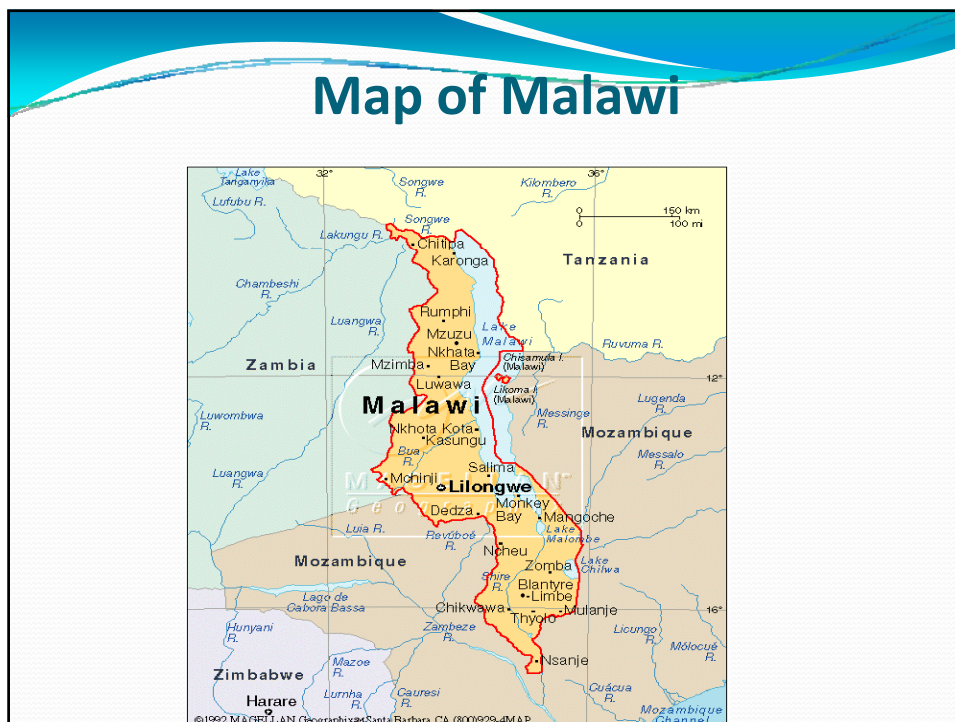
Presentation Outline

- Introduction
- Legal Instruments
- The ICT sector performance and indicators
- Challenges
- Opportunities
- Future prospects

Introduction: Map of Africa



Map of Malawi



• Introduction

- **Location of Malawi:**
- Malawi is located in South Eastern Africa and bordered by
 - Tanzania to the North East,
 - Zambia to the west
 - Mozambique to Southeast and South.
- Population: about 13.4 million
- Population Growth Rate: 1.9% per annum

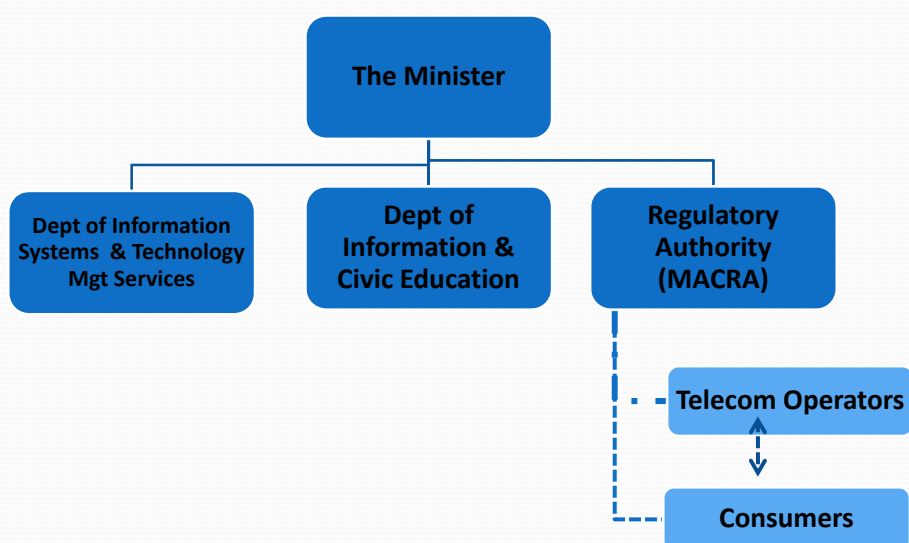
Structure of the Economy

GDP composition	2007	2008	2009
Agriculture	32.47%	32.94%	31.58%
Construction	4.61%	4.55%	3.47%
Manufacturing	7.81%	7.99%	9.89%
Financial and Professional Services	10.65%	10.51%	10.85%
Transport and Storage	3.55%	3.41%	3.45%
Information and Communication	2.49%	3.44%	4.52%
Mining and Quarrying	0.89%	0.87%	0.98%

Trade and Economic Indicators

Indicator	Percentage
Real GDP growth (2009)	7.6%
Real GDP growth (2008)	9.8%
GNP per capita (2009)	US\$ 289
Inflation rate (April 2010)	8.1%
Inflation rate (May 2010)	7.8%
Average Annual Inflation Rate (2009)	8.4%
Average Annual Inflation Rate (2008)	8.7%

The ICT Sector Structure



The ICT Sector

- Policy & Legal Framework
- Regulatory framework
- Telecommunication Operations

Policy & Legal Framework

- The Communications Sector Policy Statement (1998) and the Communications Act of 1998 are the prevailing legal instruments in the ICT Sector.
- Communications Sector Policy:
 - was formulated by the Government through the Ministry of Information and Civic Education (MICE);
 - The Ministry is the overall ministry that oversees the sector including providing the enabling environment for ICT development.
- The Communications Act (1998): was formulated by the government through MICE and Ministry of Justice by consulting the general public

Regulatory framework

- The Malawi Communications Regulatory Authority (MACRA) was established under section 3 of the Communications Act (1998). Operations commenced in 2000 with mandate covering the four basic communication sectors namely;
 - Telecommunications;
 - Broadcasting;
 - Postal services; and
 - Management of radio frequencies (spectrum).
- MACRA is an independent regulator

Regulatory mandate and duties

- In deriving its mandate from the Communications Act, MACRA undertakes the following duties in regulating the communications sector;
 - Ensure the provision of reliable & affordable communication services.
 - Protect the interests of consumers.
 - Promote efficiency and competition.
 - Encourage the introduction of new communications services.
 - Promote research and development.

Mandate and Duties (cont.)

- Foster 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).
- Serving as a policy advisory body to the Ministry responsible for communications.

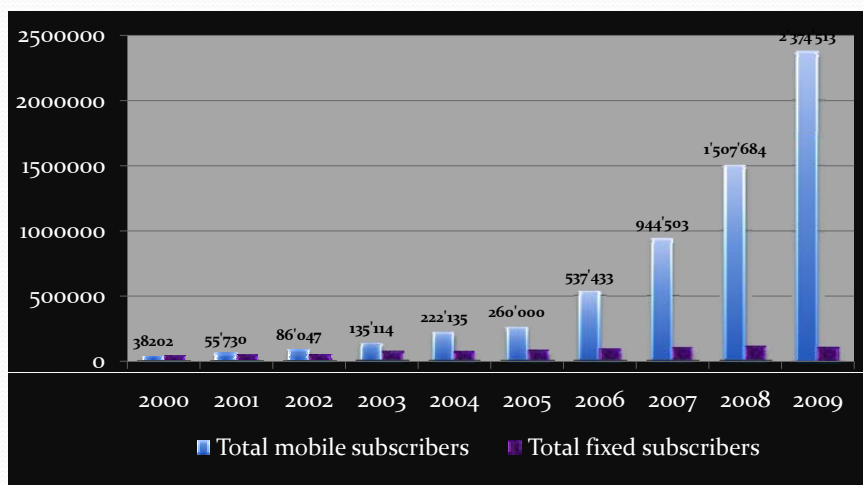
Telecommunication operations

Category	Quantity	Name of Operator	Technology
Fixed operators	2	MTL, ACL	CDMA, Optical Fibre,
Mobile operators	3	TNM, Zain, G-Mobile	GSM 900 & GSM 1800), WCDMA & HSDPA
Carrier of Carrier	1	ESCOM	Optical fibre
International Gateway Service	4	TNM, Zain, MTL, Maren	Via Satellite, optical fibre
ISP	10	Skyband, Globe, Malawi Net	Wi-Max, Wi-Fi, etc

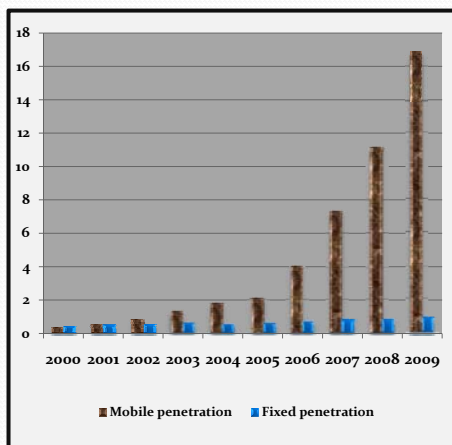
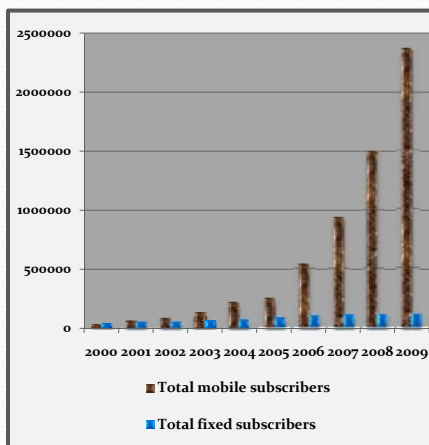
ICT Indicators

PARAMETER	STATISTICAL INDICATOR
<i>Teledensity</i>	18.32 %
<i>Main Fixed Telephone Lines</i>	111,133
<i>Fixed Teledensity</i>	0.83 %
<i>Mobile Subscribers</i>	2,362,005
<i>Mobile Teledensity</i>	17.5 %
<i>Internet Subscribers</i>	105,000
<i>Internet Teledensity</i>	0.7 %
<i>Population covered by mobile signal</i>	84 %

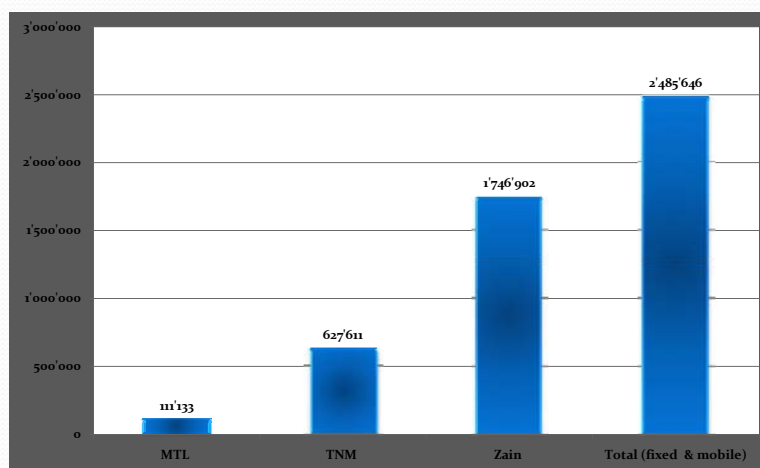
Subscribers (2000 to 2009)



Telecommunications Growth: mobile and fixed subscribers

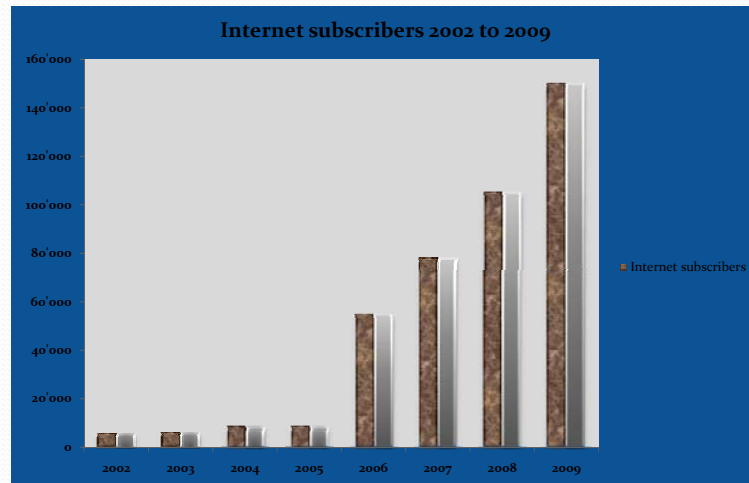


Subscriber growth 2009 (fixed & mobile)



Growth of Internet subscribers 2002 -2009

	2002	2003	2004	2005	2006	2007	2008	2009
Internet subscribers	5,717	6,055	8,051	8,197	55,029	78,000	105,000	150,000



Challenges

- High cost of telecom services in the country
- In availability of ICT infrastructure in most rural parts of the country
- Power failure
- Communications Act failure to govern the ICT industry

Opportunities

- Government political will
 - Generous Tax allowance on telecoms equipment
 - ICT Policy and other policies
 - Skilled labour market: Inclusion in the academia
 - Network of stakeholders: Constant consultation on national issues
- Liberalisation: Modern and higher generation services
- Availability of spectrum & numbers
- Economic growth: Stability of economic indicators

Future prospects:

- National Backbone/ Connection to the submarine: RCIPMW
- Universal Access Projects

