

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



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INCM

MOZAMBIQUE
8th World Telecommunication/ICT
Indicators Meeting 2010

Maputo, 04 of November 2010

Web-www.incm.gov.mz

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- The Regulator
- Sector Policy and Vision
- The existing Infra-structure
- The Market
- Conclusion

16-11-2010 2

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The Regulator

- INCM was established under the Decree No. 22 of 1992 as Independent Communication Authority Body and commenced operations in 1996
- Regulates the whole communications sector in respect of Telecommunications, Postal Services, the Radio Frequency Spectrum (include Broadcasting)

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3

The Regulator

- acts as a government advisor on policy matters pertaining to communications sector
- monitors the activities of licensees, enforce compliance with set regulations
- ensures the provision of services to under-served areas as part of the universal access and service obligations.

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4

Communications Sector Policy

Policy objectives:

- Promote development of telecommunications infrastructure and markets;
- Support market liberalization, and competition;
- Strengthen the role of Regulator;
- Promote universal access to telecommunications services;
- Ensure consumer protection

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5

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Communications Sector Policy

Vision for the Sector:

- Expansion of industry (telecom and information services);
- Economic development and opportunity for all citizens and businesses;
- Social and cultural enrichment, including universal access to information and communication

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6

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Communications Sector Policy

The Existent Legislation of Sector

- ❖ Lei 8/04 21 de Julho “Telecommunication Law“
- ❖ Resolucao 54/06 “Estrategia das Telecomunicacoes”
- ❖ Decreto 32/01 de 06 de Novembro “The INCM Statutes”
- ❖ Decreto 33/01 de 06 de Novembro “License Regulation“
- ❖ Decreto 34/01 de 06 de Novembro “Inter”conection Regulation“
- ❖ Decreto 35/03 24 de Setembro “Numbering Regulation”
- ❖ Decreto 64/04 de 29 Setembro “C ommunications annual Fees Regulation”
- ❖ Decreto 63/04 de 29 de Dezembro “Frequency fees”
- ❖ Decreto 69/06 de 26 de Dezembro “Universal Access Fund Regulation”
- ❖ Postal Policy – Aproved in 2008
- ❖ Decreto 153/10 de 15 de Setembro “Sim Card registration”

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7

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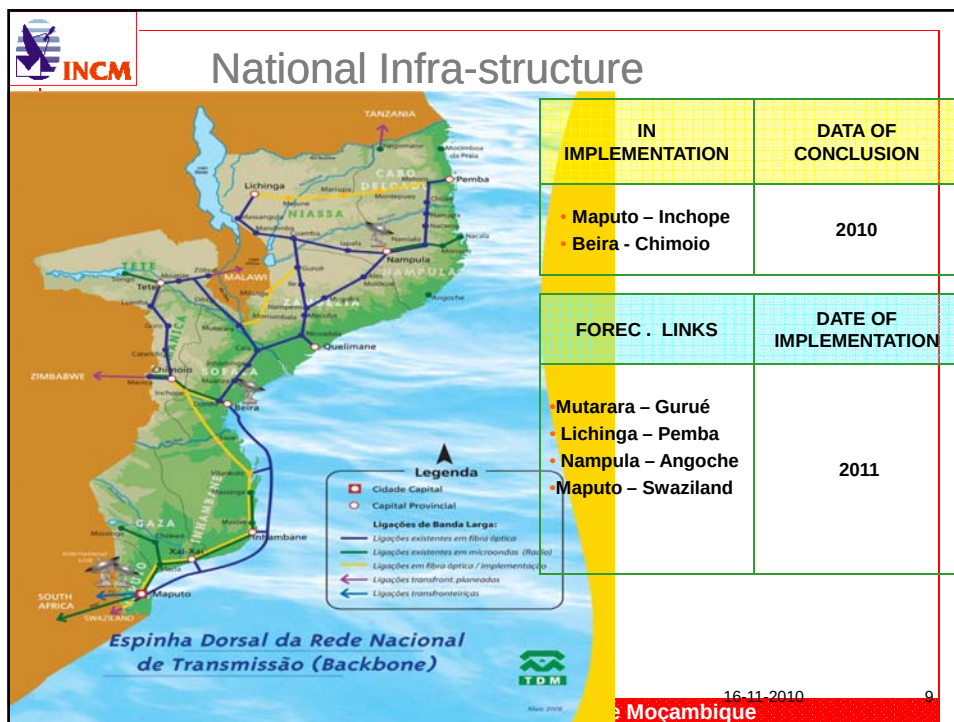
Market Structure

Numbers of Services Providers	2009
Fixed Operator	1
Mobile Operator	2
Data Comm Providers	20
Tv - Cable	3
Value Adde Services	9
ISP's	17
Audio Text	1
TOTAL	53

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8

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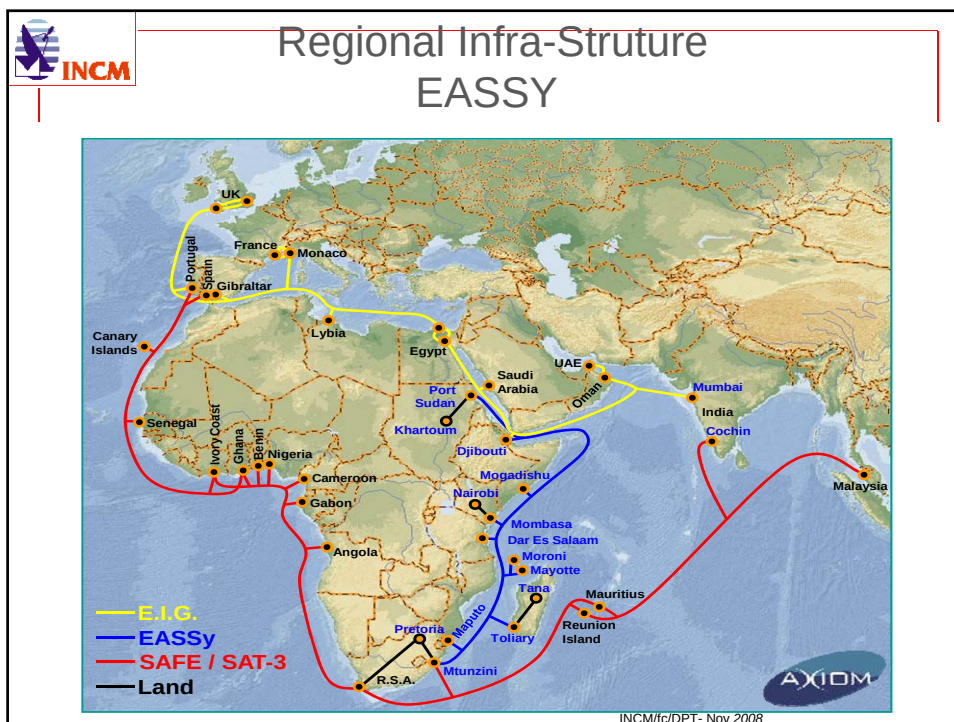
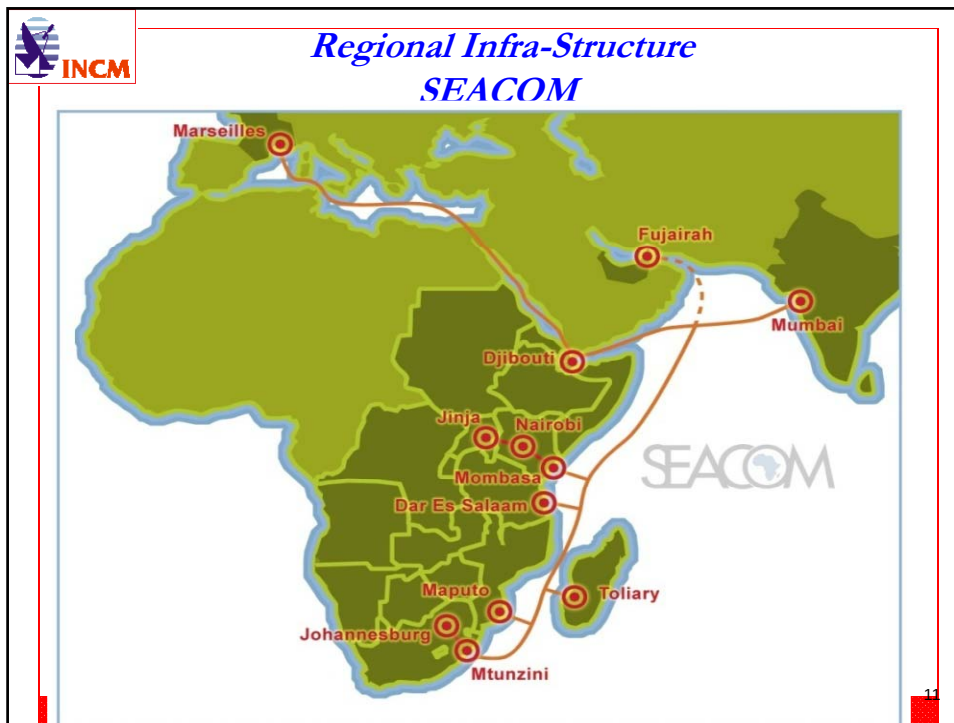
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Regional Infra-structure

- ❖ Moçambique has Tx links connected to:
 - ❖ South Africa (fibre & radio)
 - ❖ Swuziland (radio, fibre till 2011)
 - ❖ Zimbabwe (fibre – now connected upto the Machipand boarder)
 - ❖ Malawi (fibre – connected upto Zobwe boarder)
- ❖ In progress other regional initiatives SEACOM and EASTERN AFRICAN SUBMARINE CABLE SYSTEM (EASSy) -
- ❖

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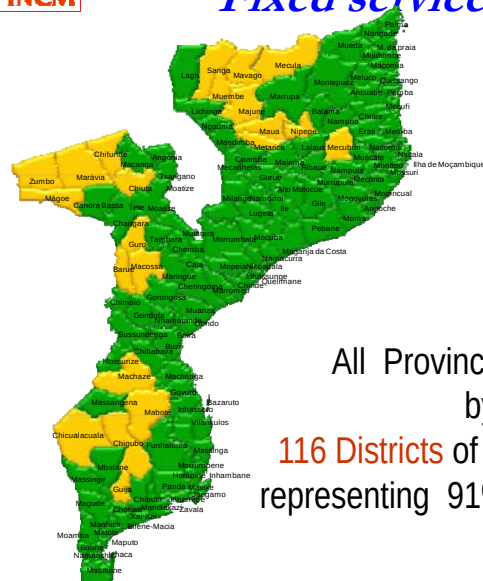
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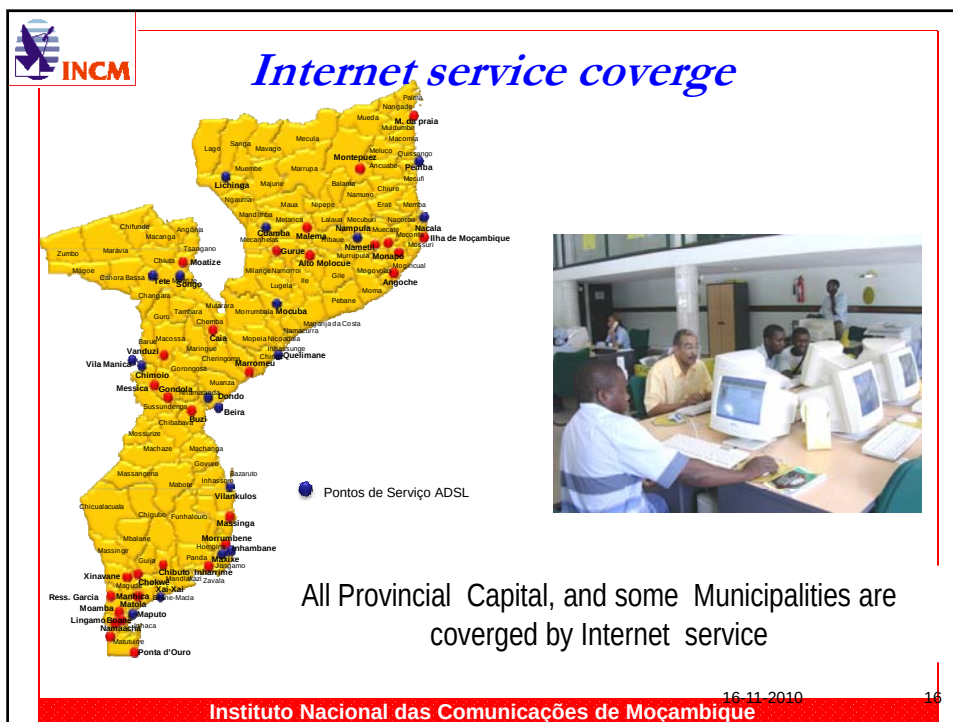
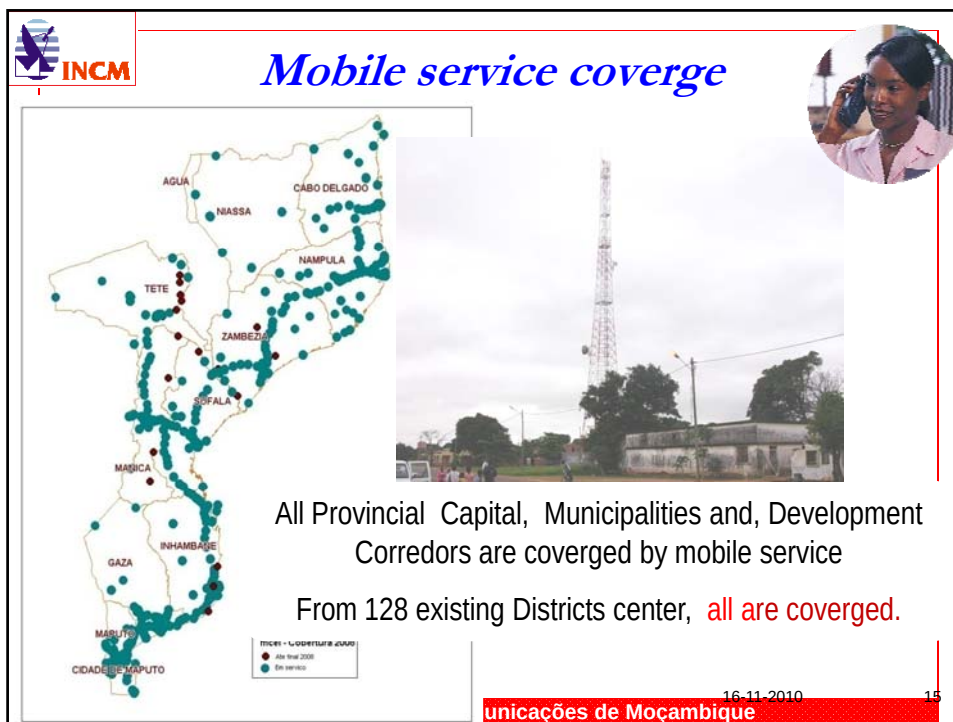
Regional Infra-structure

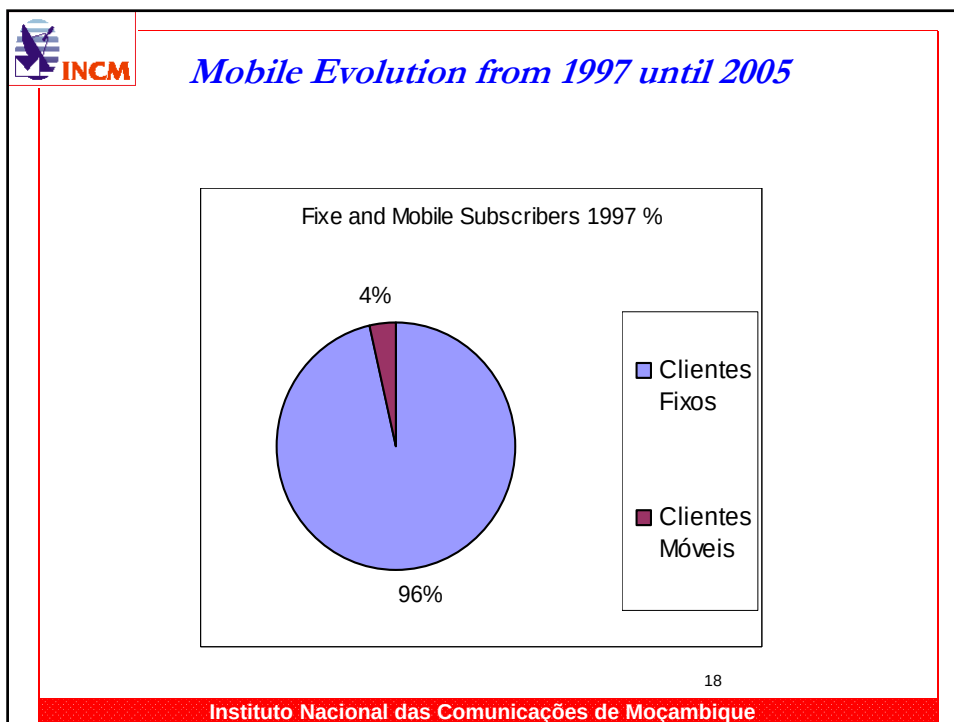
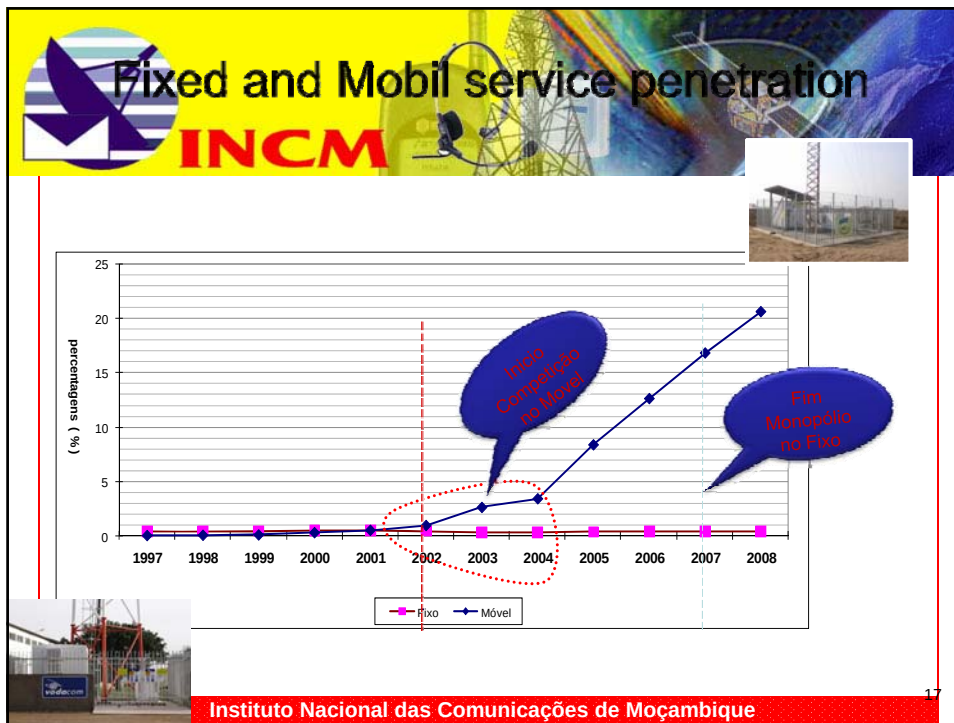
- ❖ The SEACOM and EASSY cable, will enhance access to global ICT infrastructure and alternative choice to regional and international connectivity

Fixed service coverage

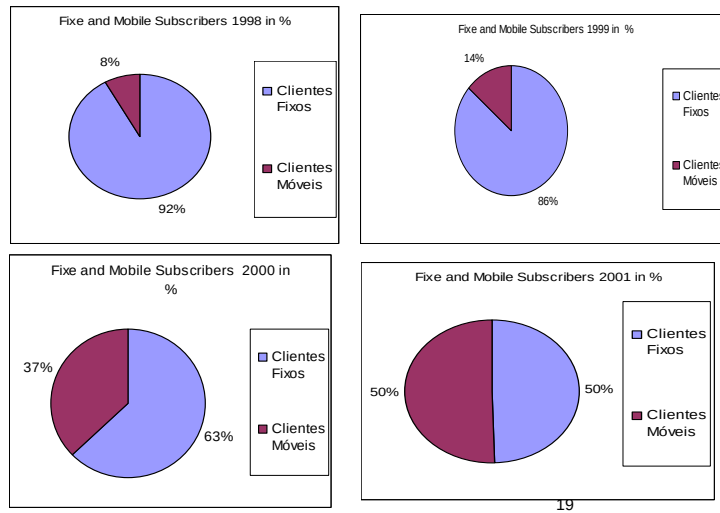


All Provincial capital are covered by fixed service;
116 Districts of 128 existing, are covered, representing 91% of District center covered



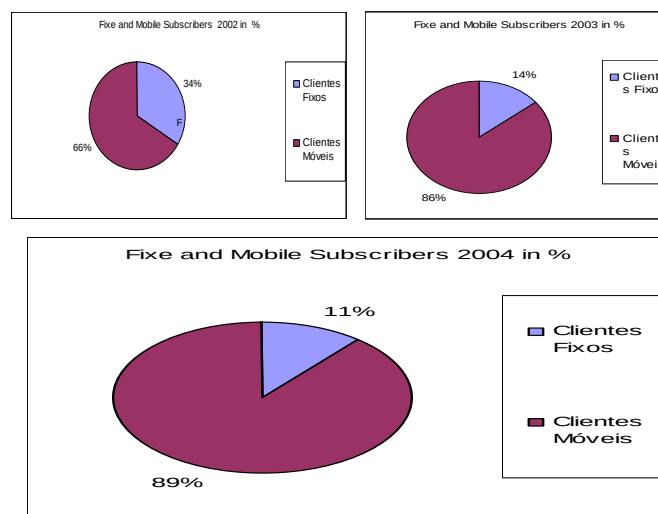


Mobile Evolution from 1997 until 2005



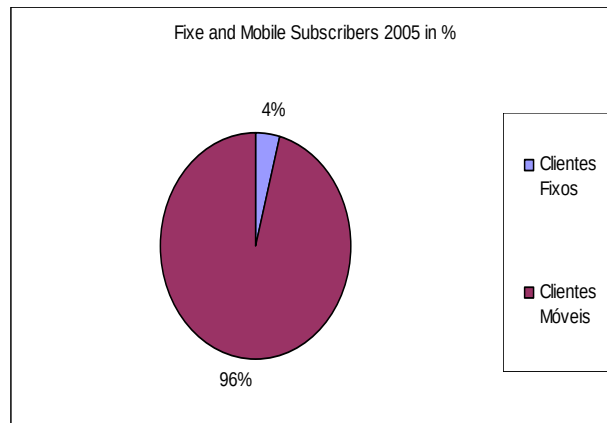
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Mobile Evolution from 1997 until 2005



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Mobile Evolution from 1997 until 2005



21

Market Liberalization / Services subject to License and Registration



22

- **Mobile Service:**
 - Full competition
 - subject to license through public bid, within availability of spectrum frequency;
- **Data Service, Private Network and leased line:**
 - Full competition
 - Licensing requirements.
 - Licenses required to provide public switched services

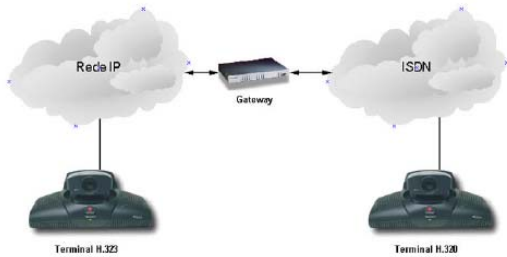




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23

- **Video Conference:**
 - Open to Competition – subject to License



Médios e grandes grupos



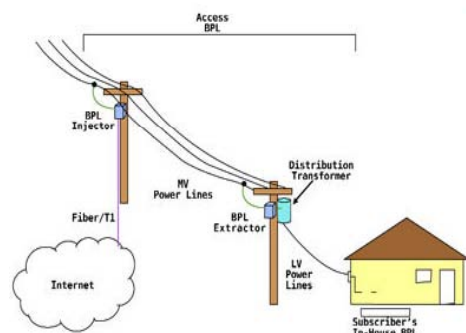
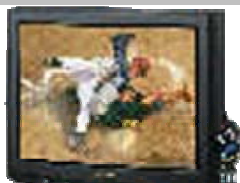


24



- **Serviços de TV a Cabo**

- Aberto a competição, sujeito a licenciamento



- **Public Pay Phone:**

- Open to Competition – subject to Registration





Internet Service:

- Full Competition;
- no restrictions or licensing requirements, registration only

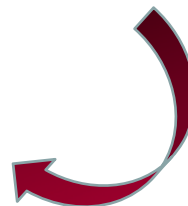


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27



THE ACCESS GAPE



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We are still having the access gap between the urban and rural and remote area,

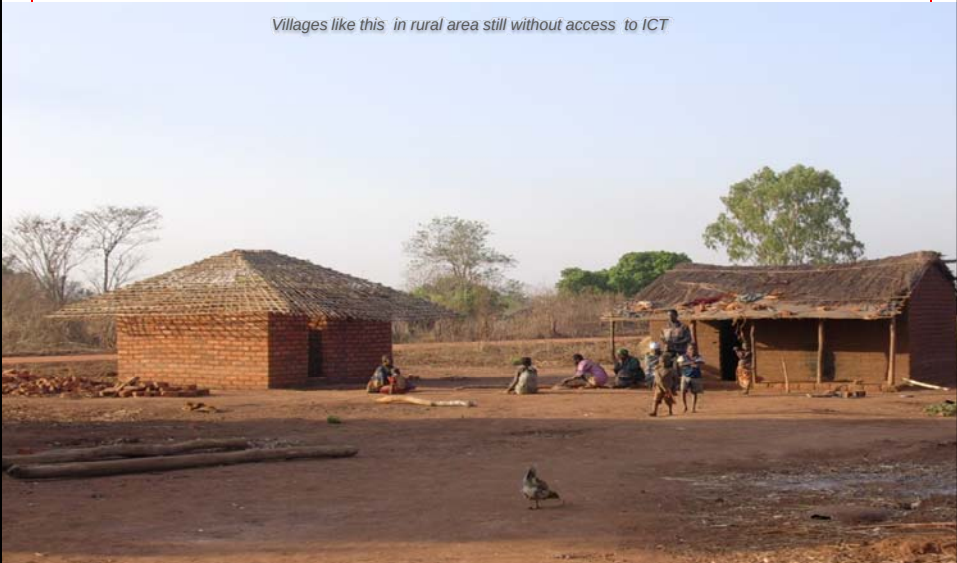



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Villages like this in rural area still without access to ICT



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Summary

- ❖ Growth of penetration from 0,53% to **29.08%** between 1999 and 2009;
- ❖ Telecommunications services growth in term of District coverage in fixed and mobile services from 68 to 126 districts covered between 2004 and 2009 (from 75.256 to para **4.223.911** subscriber in the same period);
- ❖ Govern actively liberalize the market and encourage the participation of the private sector;
- ❖ We have about 53 public and private company in the sector

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31

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Major Opportunities

- Good will at very top of the political leadership
- Telecommunications Policy and Law in place
- Telecommunication Market full liberalized
- Good environment to implement new communications technologies
- ICT recognized as a cross-cutting issue and a development tool by all stakeholders

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THANK YOU
MUITO OBRIGADO



24/7/2007 15:05

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