

Botswana

This landlocked country is noted for its progressive policy and regulatory regimes. Recently it moved to a new licensing framework which has allowed for various players to enter the ICT market, leading to new services offerings, lower prices and increased competition.

Mobile services: There are three mobile operators in Botswana: MASCOM, the market leader, majority-owned by institutional investors; Orange, 74 per cent owned by Orange France; and beMOBILE, 51 per cent owned by the government and 45 per cent by citizen investors (shareholders). The last is the mobile division of incumbent Botswana Telecommunications Corporation Limited (BTCL). This relatively high level of competition for a small population has paid off. In 2014, 94 per cent of households had a mobile phone.¹⁰⁷ Mobile-broadband has grown significantly since the launch of 3G in 2009. Both MASCOM and Orange commercially deployed LTE networks in 2015.

Fixed services: In 2013, the Government of Botswana separated incumbent BTCL into a services company (which continues to be called BTCL) and an infrastructure company called Botswana Fibre Networks (BOFINET). The latter is a wholesaler, rolling out the national fibre network, making the Government's investments in international capacity and some other infrastructure available to third parties. BTCL was listed on the local stock exchange in 2015. Although the market is open, fixed-telephone subscriptions are solely offered by BTCL. Penetration is relatively high for sub-Saharan Africa. Fixed-broadband has been limited to two technologies: ADSL provided by BTCL and fixed wireless provided by Orange. Since December 2015, BOFINET has been offering wholesale fibre to the premises to enable resellers connect businesses and households, with speeds ranging from 2 to 50 Mbit/s. There is a 2 000 km nationwide fibre-optic backbone ring with connections to all urban centres, major villages and key border crossings. This ensures that, though landlocked, Botswana has ample cross-border access to submarine cables in neighbouring nations. The Botswana IXP was launched in 2005 and hosts 12 peers.

Key indicators for Botswana (2017)	Africa	World
Fixed-telephone sub. per 100 inhab.	6.2	0.9 13.0
Mobile-cellular sub. per 100 inhab.	141.4	74.4 103.6
Active mobile-broadband sub. per 100 inhab.	66.9	24.8 61.9
3G coverage (% of population)	84.0	62.7 87.9
LTE/WiMAX coverage (% of population)	65.0	28.4 76.3
Individuals using the Internet (%)	41.4	22.1 48.6
Households with a computer (%)	31.2	8.9 47.1
Households with Internet access (%)	45.7	19.4 54.7
International bandwidth per Internet user (kbit/s)	26.5	11.2 76.6
Fixed-broadband sub. per 100 inhab.	2.1	0.6 13.6
Fixed-broadband sub. by speed tiers, % distribution		
<i>-256 kbit/s to 2 Mbit/s</i>	84.0	38.7 4.2
<i>-2 to 10 Mbit/s</i>	15.5	37.2 13.2
<i>-equal to or above 10 Mbit/s</i>	0.4	24.1 82.6

Note: Data in italics are ITU estimates. Source: ITU (as of June 2018).

Government policy: The Ministry of Transport and Communications is responsible for policy for the development and utilization of ICTs and integrated transport services. The Botswana Communications Regulatory Authority is a converged regulator responsible for telecommunications, posts, Internet and broadcasting. It emerged from the Botswana Telecommunication Authority, established in 1997. The Authority, through its special purpose vehicle of the Universal Access and Service Fund, has supported a project to provide Wi-Fi hot spots in more than 30 strategic locations (e.g. shopping malls, bus stops, hospitals, etc.) across the country. The Wi-Fi hotspots are deployed by the wholesale service provider and retailers can access their network infrastructure on equal terms. The hotspots offer free access to the Government website and a complementary 10 minutes per device of Internet access daily.

Conclusion: Botswana has an advanced ICT market and regulatory framework. The Government has opted for a wholesale backbone model to facilitate open access and cost-based pricing in order to lower prices.