POSTAL AND TELECOMMUNICATIONS REGULATORY AUTHORITY OF ZIMBABWE (POTRAZ)

'creating a level playing field'

POSTAL & TELECOMMUNICATIONS ABRIDGED SECTOR PERFORMANCE REPORT

THIRD QUARTER 2025

Disclaimer:

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LIST OF ACRONYMS

2G……………………………. Second Generation

3G……….............................. Third Generation

5G…………………………...Fifth Generation

CDMA………………………Code-Division Multiple Access

ADSL………………………. Asymmetric Digital Subscriber Line

GB…………………………. Gigabyte

IAP…………………………..Internet Access Provider

LTE…………………………Long Term Evolution

MB…………………………. Megabyte

PB…………………………. Petabyte (1PB = 1 billion Megabytes)

Mbps………………………. Megabits per Second

PSTN………………………. Public Switched Telephone Network

VoIP………………………. Voice Over Internet Protocol

VSAT………………………Very Small Aperture Terminal

WiMAX…………………….Worldwide Interoperability for Microwave Access

MAJOR HIGHLIGHTS

The following are the main sector trends for the third quarter of 2025, compared to the second quarter of 2025:

- The sector recorded a 2.13% increase in active mobile subscriptions from 16,089,628 to 16,432,685. Resultantly, mobile penetration rate increased by 2.19 percentage points from 102.64% to record 104.83% in the quarter under review.
- Active fixed telephone subscriptions increased marginally by 0.29% from 300,753, to reach 301,613 while fixed tele-density remained at 1.92%.
- Machine-to-machine (M2M) penetration rate stood at 1.48% in the quarter under review.
- The total number of active Internet/data subscriptions saw a slight increase of 1.27% from 12,827,031 to 12,990,447 in the quarter under review.
- Internet penetration rate went up by 1.04 percentage points from 81.83% to reach 82.87%.
- Broadband penetration rate went up marginally by 0.71 percentage points from 79.87% to 80.58%.
- Total mobile voice traffic saw a robust increase of 10.3% from 4.21 billion minutes to 4.65 billion minutes in the quarter under review.
- Mobile Internet/data traffic increased significantly by 10.72% from 130.14 Petabytes recorded in second quarter to 144.09 Petabytes.
- Total voice traffic by the PSTN Operator increased marginally by 0.80% from 49.36 million minutes to record 49.75 million minutes in the quarter under review.
- The sector saw a robust growth in fixed Internet/data traffic of 18.39% from 372.4 Petabytes (PB) to 440.9 PB in the quarter under review.
- Total revenue for Mobile Network Operators grew by 8.35% from ZWG 6.71 billion to record ZWG 7.27 billion, whereas aggregate operating costs increased heavily by 19.71% from ZWG 3.48 billion to ZWG 4.16 billion. Meanwhile, total capital expenditure declined by 67% from ZWG 1.53 billion to ZWG 508.9 million.
- Total IAP revenue went up by 6.13% from ZWG 2.36 billion in the second quarter, to ZWG 2.51 billion in the quarter under review. Operating costs declined by 12.54% whereas capital expenditure increased by 9.19%.
- Overall equipped international Internet bandwidth capacity saw a slight movement from 1,456,080 Mbps to 1,456,270 Mbps in the quarter under review.
- Used incoming international Internet bandwidth capacity increased by 7.99% from 504,778 Mbps recorded in the second quarter to 545,123 Mbps in the quarter under review, whereas

used outgoing international Internet bandwidth capacity grew significantly by 18.53% from 170,823 Mbps to reach 202,485 Mbps in third quarter of 2025.

- Postal and courier volumes saw a huge decline of 18.15% from 439,561 items to 359,794 items in the third quarter of 2025.
- The total number of operational postal and courier outlets declined from 494 to 491 outlets recorded in the third quarter of 2025.
- Postal and courier Revenue and operating costs increased by 5% and 5.8% respectively. Meanwhile capital expenditure went down by 85.1% in the quarter under review.

1.0 MOBILE TELEPHONY

1.1 ACTIVE MOBILE SUBSCRIPTIONS

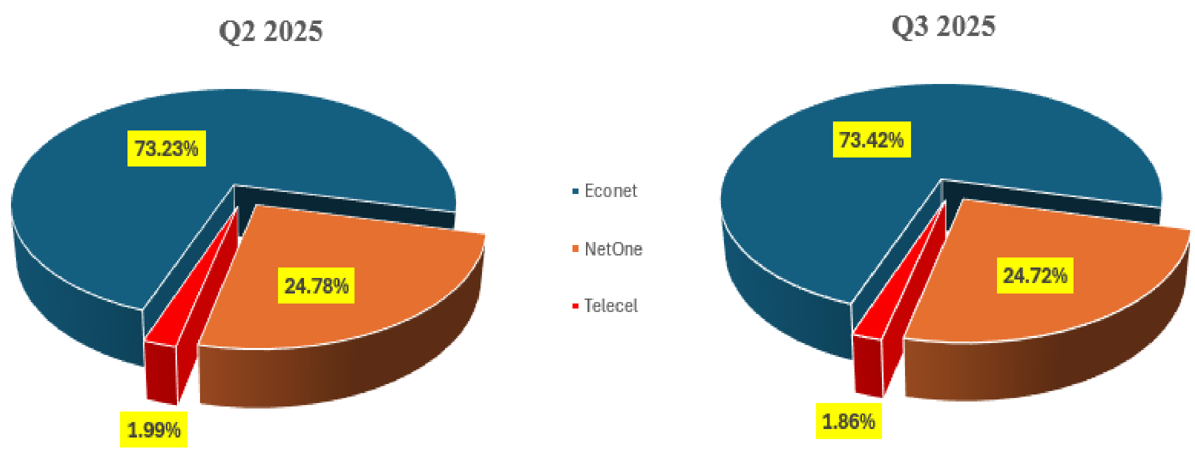
The sector recorded a 2.13% increase in active mobile subscriptions from 16,089,628 recorded in the second quarter of 2025 to 16,432,685 in the quarter under review. Resultantly, mobile penetration rate increased by 2.19 percentage points from 102.64% to record 104.83%. The following table shows a quarterly comparison of active mobile subscriptions:

Table 1: Active Mobile Subscriptions

Operator	Q2 2025	Q3 2025	Change (%)
Econet	11,782,975	12,064,749	2.39%
NetOne	3,987,105	4,062,894	1.90%
Telecel	319,548	305,042	-4.54%
Total	**16,089,628**	**16,432,685**	**2.13%**
Mobile Penetration Rate	**102.64%**	**104.83%**	**2.19**

In the quarter under review, Econet and NetOne increased subscribers by margins of 2.39% and 1.90% respectively, whilst Telecel lost subscribers by 4.54% as shown above. Figure 1 below shows a quarterly comparison of market shares of active mobile subscriptions by the three Mobile Network Operators (MNOs):

Figure 1: Market Share of Mobile Subscribers



Econet continued to demonstrate a solid momentum on mobile subscriptions with a 0.19 percentage point increase on its market share. Conversely, NetOne saw a minor dip of 0.06 percentage points, while Telecel ceded 0.13 percentage points in the quarter under review.

1.2 MOBILE VOICE TRAFFIC

Mobile Network Operators recorded a robust 10.3% increase in total voice traffic from 4.21 billion minutes to 4.65 billion minutes in the third quarter of 2025. The following table shows per-operator total traffic for the MNOs in the quarter under review compared to the previous quarter:

Table 2: Mobile Telephone Traffic by Operator

Operator	Q2 2025	Q3 2025	Change (%)
Econet	3,692,145,977	4,029,493,381	9.14%
NetOne	521,361,797	617,857,214	18.51%
Telecel	944,584	1,049,391	11.10%
Total	**4,214,452,358**	**4,648,399,986**	**10.30%**

The following table shows a quarterly comparison of total mobile telephony traffic per service category.

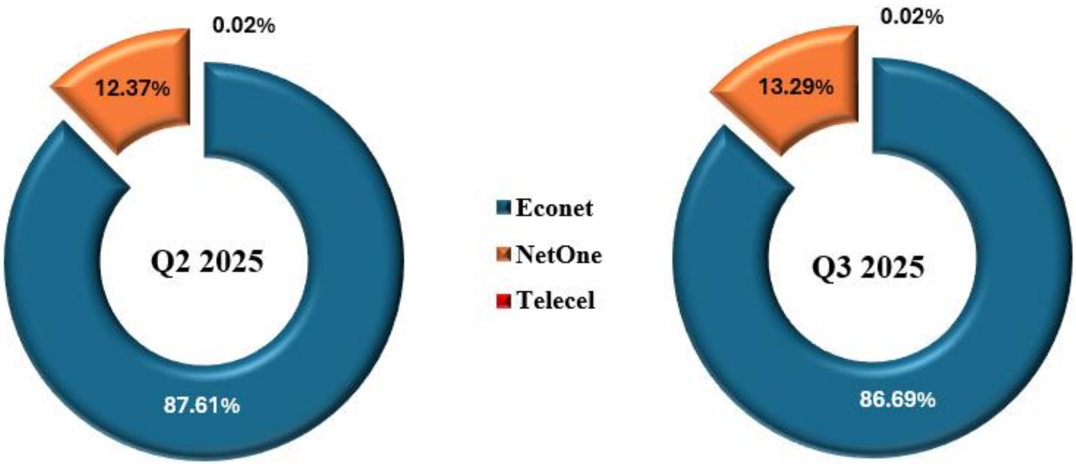
Table 3:Mobile Telephone Traffic

Traffic category	Q2 2025 (In Minutes)	Q3 2025 (In Minutes)	Change (%)
Net on Net	3,656,282,870	3,971,882,588	8.63%
Mobile to Fixed	3,223,839	3,301,455	2.41%
Incoming from Fixed	40,106,590	41,303,873	2.99%
Mobile to Other Mobile	469,156,213	584,808,607	24.65%
Outgoing to IAPs	2,513,084	2,753,760	9.58%
Incoming from IAPs	27,620,232	29,364,233	6.31%
Total National	**4,198,902,827**	**4,633,414,516**	**10.35%**
International Incoming	11,340,200	11,359,200	0.17%
International Outgoing	3,618,857	3,057,747	-15.41%
Inbound Roaming	462,829	427,395	-7.66%
Outbound Roaming	127,645	141,128	10.56%
Total	**4,214,452,358**	**4,648,399,986**	**10.30%**

The robust increase in total mobile traffic is primarily driven by significant growths in on-net and interconnect traffic which went up by 8.63% and 24.65% respectively. These traffic segments continue to be the main contributors to national traffic performance. This may be attributed to the provision of voice bundles which allow for both onnet and offnet calls.

Figure 2 below shows a quarterly comparison of mobile voice traffic market shares for the 3 MNOs:

Figure 2: Mobile Voice Traffic Market Share



As depicted above, NetOne gained 0.92 percentage points in mobile voice traffic market share, whilst Econet ceded an equivalent share. On the other hand, Telecel's position remained stable at 0.02%.

1.3 MOBILE INTERNET/ DATA TRAFFIC

Mobile Network Operators collectively recorded a significant quarter-on-quarter increase in Internet/data traffic, surging by 10.72% from 130.14 Petabytes (PB) to 144.09 PB in the quarter under review. Table 4 below illustrates the per-operator quarterly comparison of Internet/data traffic.

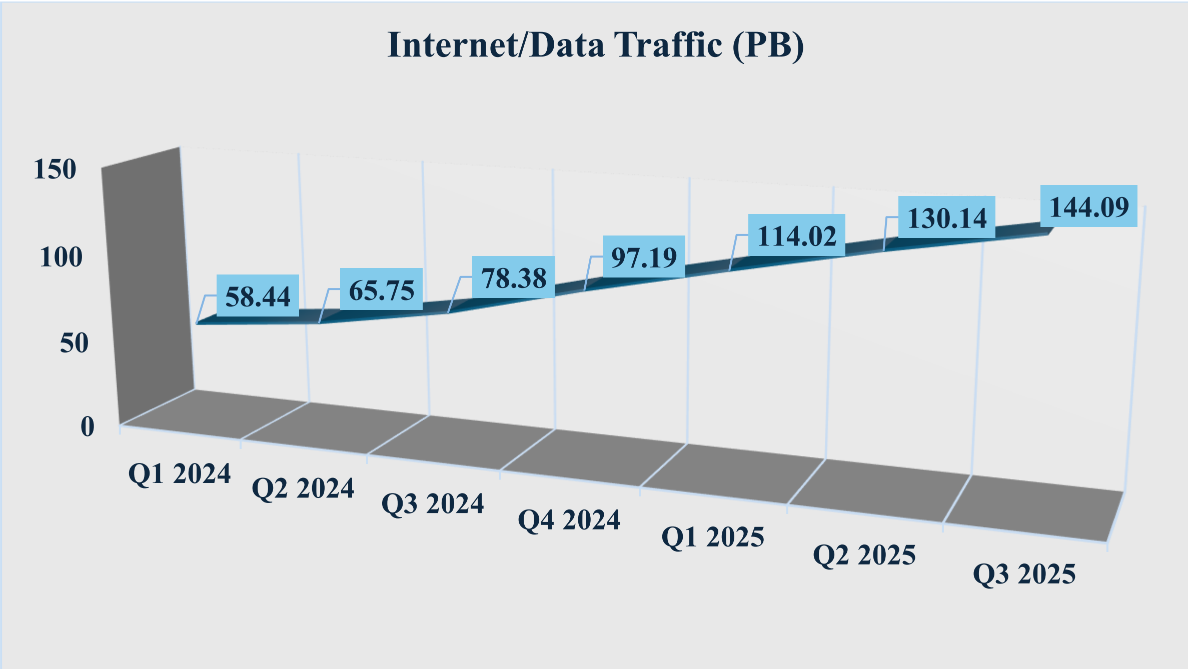
Table 4: Mobile Internet/Data Traffic

Operator	Q2 2025 (MB)	Q3 2025 (MB)	Change (%)
Econet	106,986,280,665	118,575,397,180	10.83%
NetOne	22,951,580,485	25,291,614,903	10.20%
Telecel	204,869,723	225,377,147	10.01%
Total	**130,142,730,873**	**144,092,389,230**	**10.72%**

NB: 1PB = 1,000,000,000MB

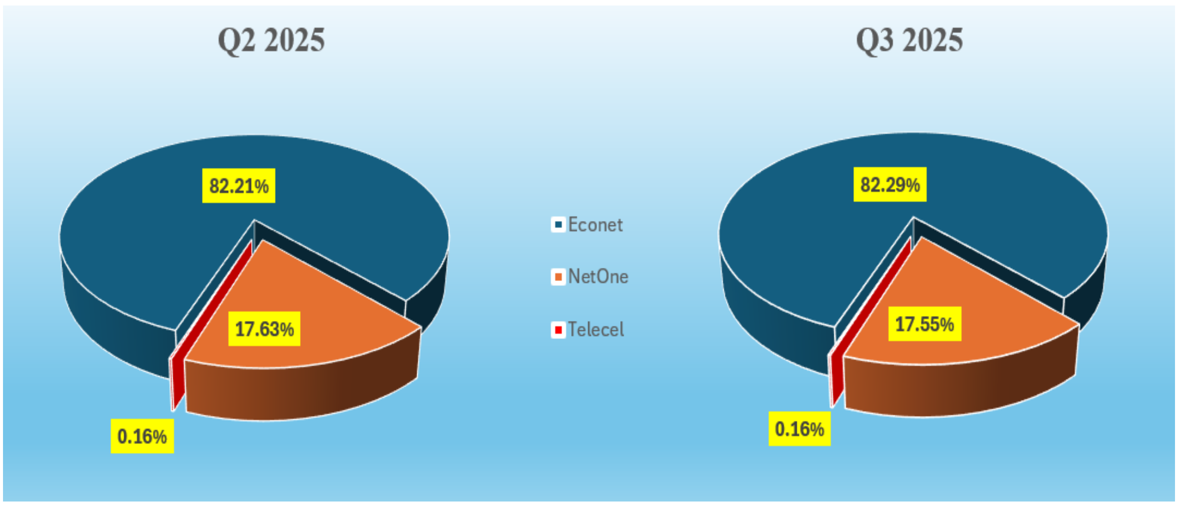
During the quarter under review, all mobile operators recorded Internet/data traffic growths of more than 10%. The robust growth figures continue to indicate a powerful and potentially accelerated shift towards more data-intensive services consumption habits. The growth in Internet/data traffic over the past year is shown in Figure 3 below.

Figure 3: Mobile Internet & data Traffic in Petabytes (PB)



Zimbabwe continues to experience significant Internet/data traffic increases in line with a global Internet traffic growth trajectory. This has been attributed to increased use of data-intensive applications supported by the rollout of high-speed network infrastructure as indicated by a 26.59% increase in 5G base station deployments among other factors in the quarter under review. The market shares for Internet/data traffic are shown in Figure 4 below:

Figure 4: Market Share for Internet/data Traffic.



As shown in Figure 4 above, Econet gained marginally by 0.08 percentage points in mobile Internet/data traffic market share, whilst NetOne ceded an equivalent share. On the other hand, Telecel's position remained stable at 0.16%.

1.4 MOBILE REVENUE, COSTS & INVESTMENTS

Mobile Network Operators experienced robust revenue growth of 8.35% from ZWG 6.71 billion to record ZWG 7.27 billion in the third quarter of 2025. On the other hand, aggregate operating costs increased substantially by 19.71% from ZWG 3.48 billion incurred in the second quarter to ZWG 4.16 billion.

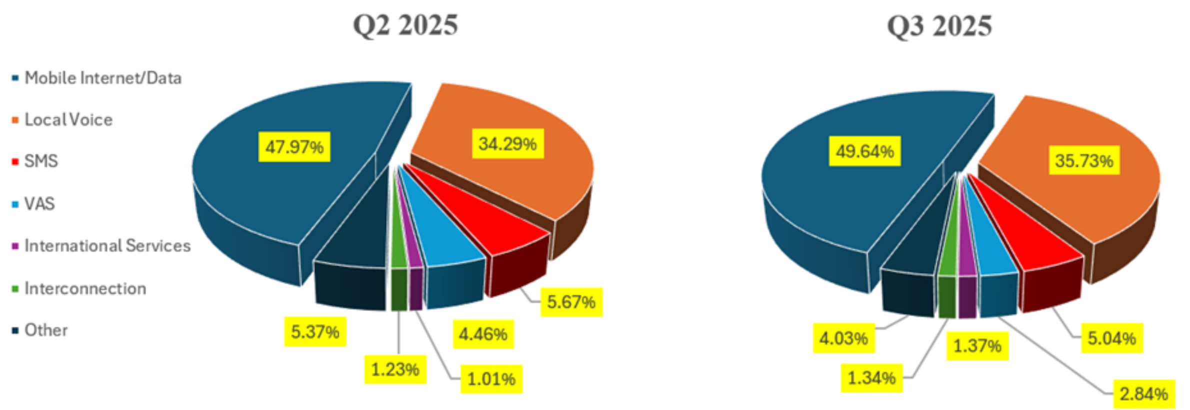
In the same period, total capital expenditure declined significantly by 67% as opposed to a 261% increase in the prior quarter, recording ZWG 508.92 million from ZWG 1.53 billion invested in the second quarter. The following table shows Revenue, operating costs and capital expenditure for the third quarter compared to the second quarter of 2025:

Table 5: Mobile Operator Revenue

Operator	Q2 2025 (ZWG)	Q3 2025 (ZWG)	Change (%)
Revenue	6,714,389,307	7,274,784,070	8.35%
Operating Costs	3,478,523,104	4,164,105,887	19.71%
Capital Expenditure	1,529,904,262	508,921,308	-67%

Figure 5 below shows a quarterly comparison of MNO revenue contribution by service.

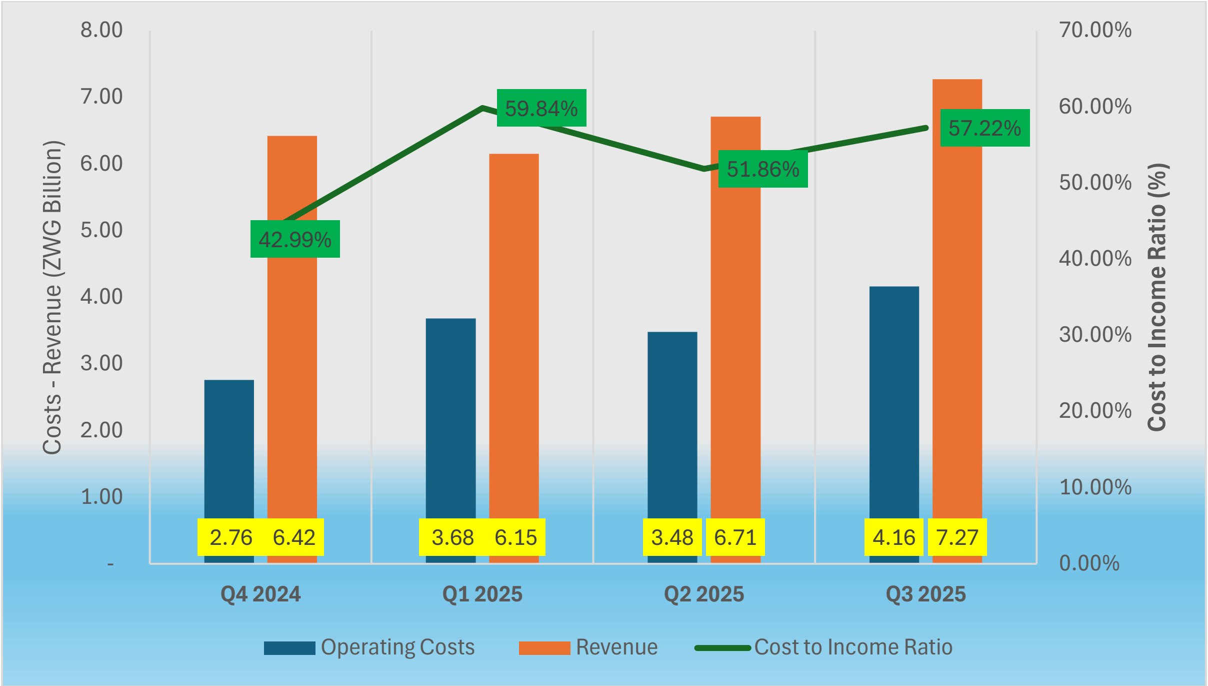
Figure 5: Market Share of Mobile Revenue



As shown above, Internet/data services continued to become the biggest Revenue contributor for the MNOs to the tune of 49.64% in the quarter under review. This is attributed to the growing use of data hungry applications such as Netflix, YouTube and Tik-Tok amongst others.

The following figure shows a trend of revenue, operating costs, and cost to income ratios for the past one year:

Figure 6: MNOs Revenue, Costs & Cost to Income Ratio



The mobile network Cost-to-Income ratio for the quarter under review worsened by 5.36 percentage points. This deterioration in operational efficiency was driven primarily by rapid operating costs increase that exceeded revenue growth.

1.5 MOBILE TELEPHONY INFRASTRUCTURE

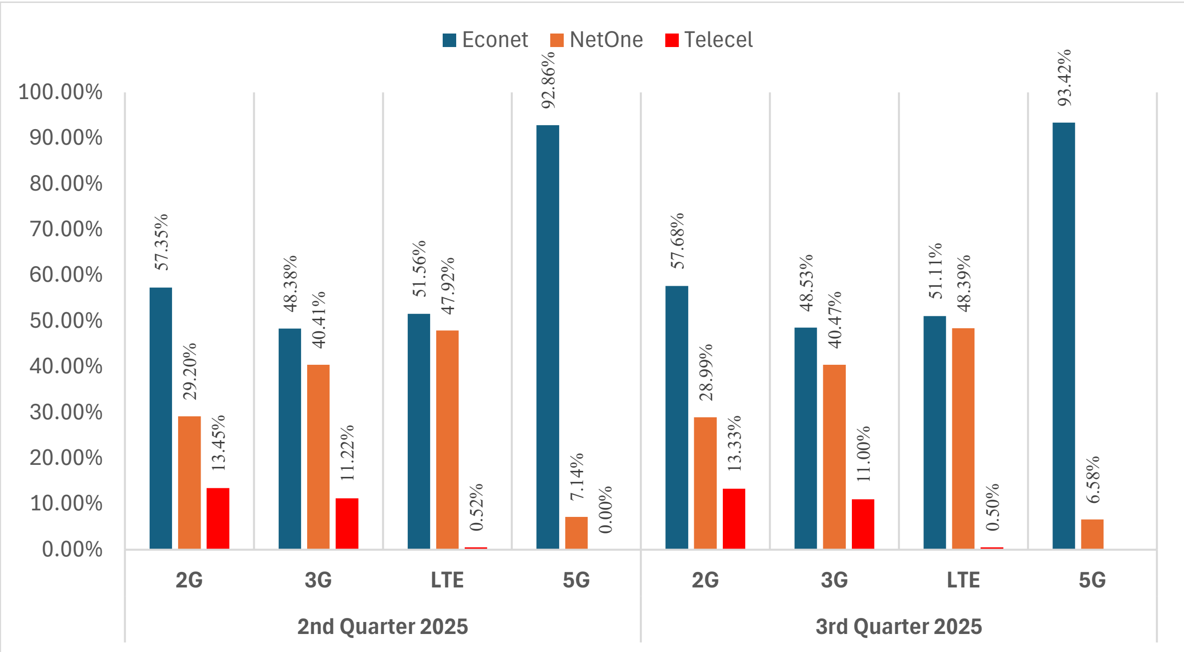
A total of 67 additional 5G base stations deployments were recorded in the quarter under review, bringing the total to 319, whilst an additional 125 LTE base stations and 76 3G base stations were deployed. A quarterly comparison of base station deployments per technology is shown in the table below:

Table 6: Mobile Base Stations

Operator	2G			3G			LTE			5G		
	Q2 2025	Q3 2025	Net Addition	Q2 2025	Q3 2025	Net Addition	Q2 2025	Q3 2025	Net Addition	Q2 2025	Q3 2025	Net Addition
Econet	2,860	2,903	43	1,876	1,919	43	1,698	1,747	49	234	298	64
NetOne	1,456	1,459	3	1,567	1,600	33	1,578	1,654	76	18	21	3
Telecel	671	671	0	435	435	0	17	17	0	0	0	0
Total	4,987	5,033	46	3,878	3,954	76	3,293	3,418	125	252	319	67
Change (%)			0.92%			1.96%			3.80%			26.59%

The significant increase in deployment of next generation network infrastructure will go a long way in enhancing connectivity, quality of service and network speeds. The market shares of mobile base station infrastructure across all technologies per operator for the third quarter compared to the second quarter of 2025 are shown in figure 7 below:

Figure 7: Market Share of Mobile Base Stations



The base station infrastructure market continues to exhibit a highly consolidated structure led by Econet. While Econet maintains its position as the market leader, NetOne continued to make strides particularly in 3G and LTE deployments, to expand its network coverage. Conversely, Telecel is facing sustained challenges, marking a period of significant stagnation across all technologies.

The following table details both geographic and population coverages across all network infrastructure technologies.

Table 7: Geographic and Population Coverage

Technology	Geographic Coverage	Population Coverage	
		Rural	Urban
2G	89.7%	78.1%	99.9%
3G	74.6%	72.8%	99.9%
LTE	58.3%	28.1%	95.4%
5G	15.6%	0.0%	18.4%

NB: The table presents estimated figures as reported by Operators.

As shown above, 18.4% of the country's population is now within the reach of a 5G network, although still only confined to urban areas. Also, noteworthy is the significant increase in 4G infrastructure deployment, which now at 58.3% geographic coverage, while 28.1%of the rural population is covered.

2.0 FIXED TELEPHONY

2.1 SUBSCRIPTIONS

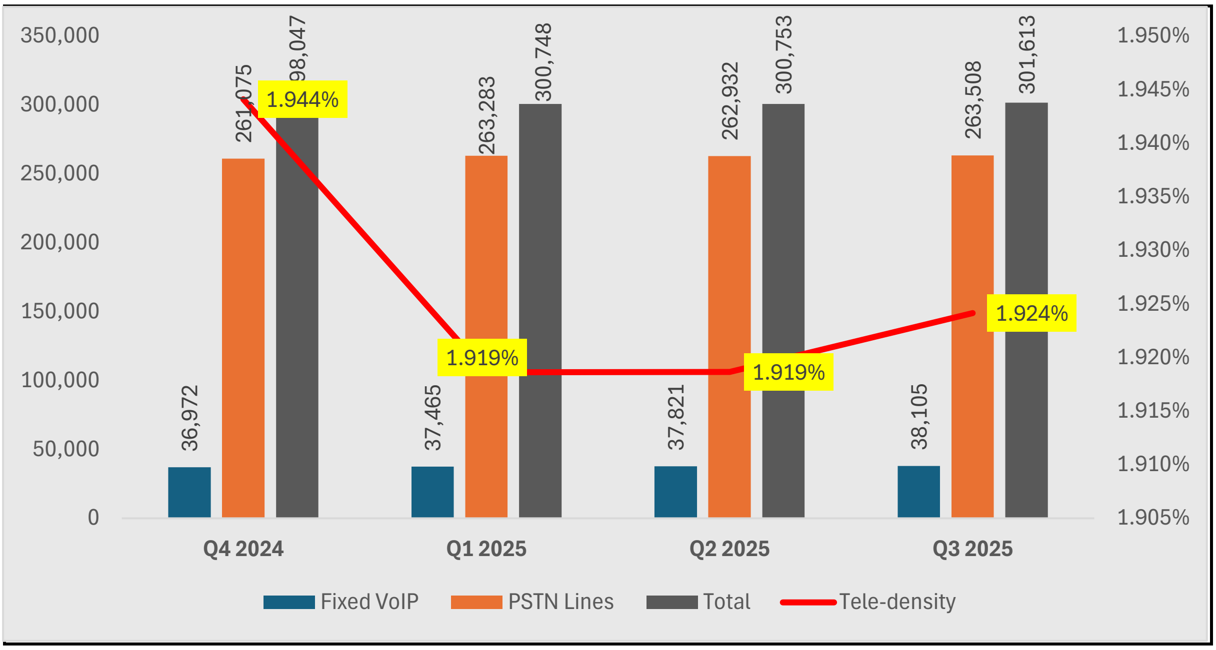
The total number of active fixed telephone subscriptions increased marginally by 0.29% from 300,753 in the second quarter, reaching 301,613 in the quarter under review, with fixed tele-density increasing proportionally from 1.919% to 1.924%. The table below shows fixed telephone subscriptions for the third quarter compared to the second quarter of 2025:

Table 8: Fixed Telephone Subscriptions

Subscriber Category	Q2 2025	Q3 2025	(%) Growth
PSTN Lines	262,932	263,508	0.22%
Fixed VoIP	37,821	38,105	0.75%
Total	**300,753**	**301,613**	**0.29%**

The trend for active fixed subscriptions for the past one-year is shown in Figure 8 below.

Figure 8: Active Fixed Telephone Subscriptions



2.1.1 FIXED VoIP MARKET SHARE

The market shares for fixed VoIP subscriptions are shown in the table below:

Table 9: Market Share for Fixed VoIP Subscriptions

Operator	Q2 2025	Q3 2025	Change
Liquid	53.10%	52.61%	-0.49
Africom	23.47%	23.63%	0.16
Dandemutande	17.91%	18.28%	0.37
TelOne	5.13%	5.09%	-0.04
Telecontract	0.39%	0.39%	0.00

As shown in table 11 above, Liquid Intelligent Technologies continued to dominate the VoIP subscriptions market with 52.61% followed by Africom with 23.63%, whilst Dandemutande, TelOne and Telecontract had 18.28%, 5.09% and 0.39%, respectively.

2.2 PSTN VOICE TRAFFIC

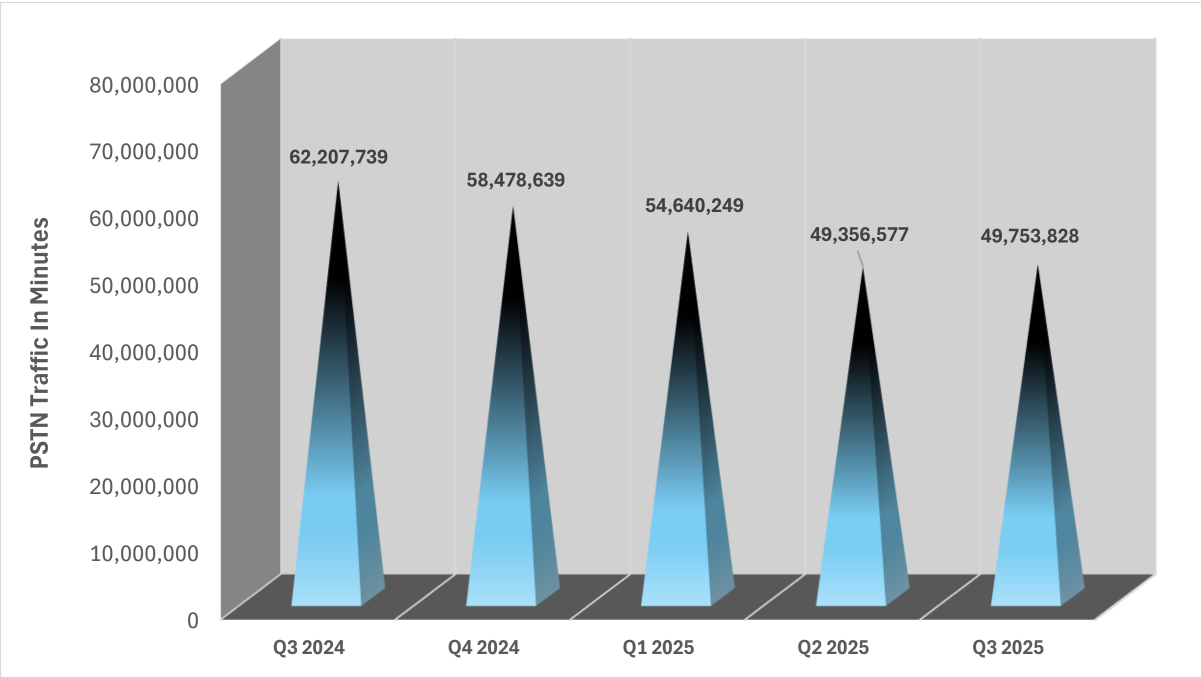
Total voice traffic by the Public Switched Telephone Network (PSTN) operator increased marginally by 0.80% from 49.36 million minutes recorded in the second quarter, to record 49.75 million minutes in the third quarter of 2025. A notable decline in fixed on-net traffic of 14.06% was registered, whilst PSTN traffic terminating on mobile networks increased by 2.52%. The following table shows a quarterly comparison of PSTN traffic per service category:

Table 10: Fixed Voice Traffic (PSTN Traffic)

Traffic category	Q2 2025	Q3 2025	Change (%)
Net on Net	4,195,957	3,605,843	-14.06%
Outgoing to Mobile	40,132,521	41,142,800	2.52%
Incoming from Mobile	3,232,166	3,315,212	2.57%
Incoming from IAPs	457,922	453,848	-0.89%
Outgoing to IAPs	485,688	486,463	0.16%
Total National Fixed Voice Traffic	**48,504,254**	**49,004,166**	**1.03%**
International Incoming	512,969	380,759	-25.77%
International Outgoing	339,354	368,903	8.71%
Total traffic	**49,356,577**	**49,753,828**	**0.80%**

Figure 9 below depicts the declining trend of PSTN voice traffic for the past one year.

Figure 9: PSTN Voice Traffic



Fixed voice traffic has been experiencing a steady decline over the year as depicted in the figure above, owing to increased shift from consumption of voice centric services to data centric services.

3 INTERNET & DATA SERVICES

3.1 INTERNET/DATA SUBSCRIPTIONS

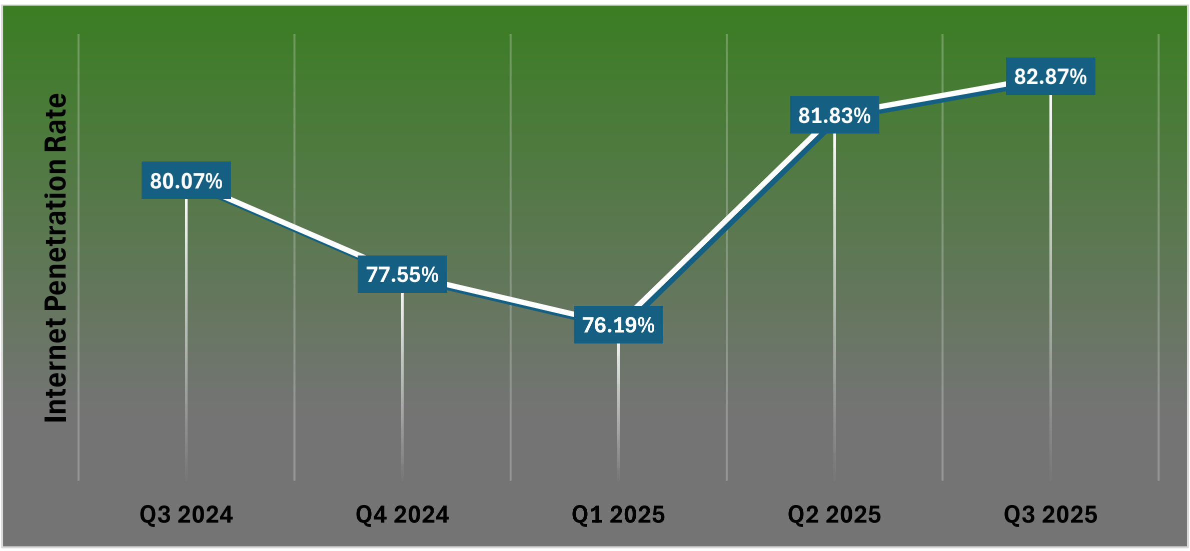
The total number of active Internet/data subscriptions saw a slight increase of 1.27% from 12,827,031 recorded in the second quarter to 12,990,447 in the third quarter of 2025. Resultantly, Internet penetration rate grew by 1.04 percentage points from 81.83% to reach 82.87% in the quarter under review. Meanwhile, broadband penetration rate increased by 0.71 percentage points from 79.87% to 80.58%. The following table shows a comparison of active Internet/data subscriptions by technology:

Table 11: Active Internet/Data Subscriptions

Technology	Q2 2025	Q3 2025	Change (%)
Mobile Internet Subscriptions	12,496,100	12,630,975	1.08%
Fixed LTE	118,811	133,958	12.75%
Leased Lines	2,921	3,433	17.53%
DSL	91,160	89,256	-2.09%
WiMAX	1,609	1,503	-6.59%
CDMA	118	101	-14.41%
VSAT	40,146	50,949	26.91%
Active Fibre Subscriptions	79,022	80,272	1.64%
Total	**12,827,031**	**12,990,447**	**1.27%**

Starlink continued to drive VSAT subscriptions as evidenced by a 26.91% increase. Figure 10 below depicts Internet penetration rate trend from the third quarter of 2024 to the quarter under review.

Figure 10: Internet Penetration Rate



3.2 IAP REVENUE, OPERATING COSTS & INVESTMENT

Total IAP revenue and capital investment grew by 6.13% and 9.19% respectively, recording ZWG 2.51 billion and ZWG 215.87 million in that order. Meanwhile operating costs declined significantly by 12.54%, signifying enhanced operational efficiency as shown in the table below:

Table 12: IAP Revenue, Operating Costs & Capital Expenditure (ZWG)

Metric	Q2 2025 (ZWG)	Q3 2025 (ZWG)	Change (%)
Revenue	2,364,732,522	2,509,627,430	6.13%
Operating Costs	2,193,937,932	1,918,906,365	-12.54%
Capital Expenditure	197,708,388	215,873,508	9.19%

3.3 FIXED INTERNET/DATA TRAFFIC

The sector saw a robust growth in fixed Internet/data traffic of 18.39% from 372.4 Petabytes (PB) to 440.9 PB in the quarter under review. A quarter-on-quarter traffic comparison per-operator is shown in the table below.

Table 13: Fixed Internet/Data Traffic (PB)

Operator	Q2 2025	Q3 2025	Change	Market Share (%)
Liquid	232,510,000,000	259,700,000,000	11.69%	58.90%
Starlink	83,942,740,000	117,828,620,000	40.37%	26.73%
TelOne	30,988,670,223	33,624,143,064	8.50%	7.63%
Telecontract	12,122,000,000	10,004,800,000	-17.47%	2.27%
Africom	4,513,483,572	4,770,381,169	5.69%	1.08%
African Fibre Networks (DFA)	1,425,000,000	7,743,000,000	443.37%	1.76%
Dandemutande	6,900,000,000	7,221,000,000	4.65%	1.64%
Total	**372,401,893,795**	**440,891,944,233**	**18.39%**	

Notably African Fibre Networks, formerly DFA recorded a staggering 443.37% increase in its Internet/data traffic from 1.43 Petabytes (PB) in the second quarter, to 7.74 PB in the third quarter of 2025.

3.4 INTERNATIONAL INTERNET CONNECTIVITY

3.4.1 EQUIPPED INTERNATIONAL INTERNET BANDWIDTH CAPACITY

Overall equipped international Internet bandwidth capacity saw a slight movement from 1,456,080 Mbps to 1,456,270 Mbps with only Africom upgrading its international Internet bandwidth capacity in the third quarter of 2025 as shown in Table 14 below:

Table 14: Equipped International Incoming Internet Bandwidth Capacity (Mbps)

Operator	Q2 2025	Q3 2025	Change (%)
Liquid	1,150,000	1,150,000	-
TelOne	195,000	195,000	-
Powertel	67,000	67,000	-
Dandemutande	40,960	40,960	-
Telecontract	2,500	2,000	-20.00%
Africom	620	1310	111.29%
Total	**1,456,080**	**1,456,270**	**0.01%**

The table below shows quarterly comparison of equipped international Internet bandwidth capacity market shares.

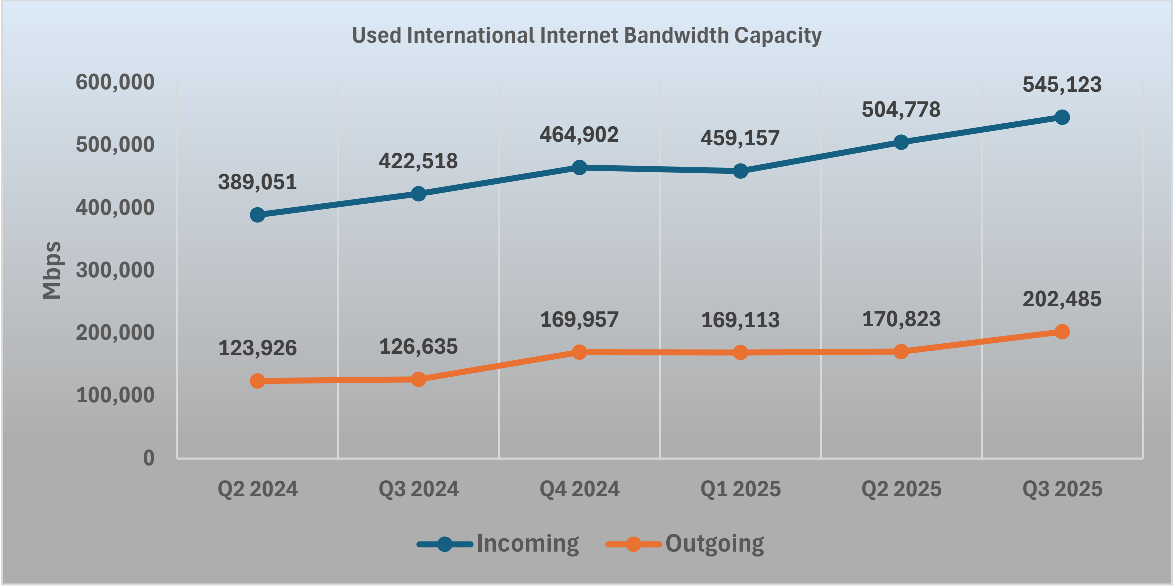
Table 15: Market Share of Equipped International Internet Bandwidth Capacity

Operator	Q2 2025	Q3 2025	Change
Liquid	78.98%	78.97%	-0.01%
TelOne	13.39%	13.39%	-
Powertel	4.60%	4.60%	-
Dandemutande	2.81%	2.81%	-
Telecontract	0.17%	0.14%	-0.03%
Africom	0.04%	0.09%	0.05%

3.4.2 USED INTERNATIONAL INTERNET BANDWIDTH CAPACITY

A quarterly comparison of used international incoming and outgoing bandwidth capacity is shown below:

Figure 11: Used International Internet Bandwidth Capacity (Mbps)



NB: The figures above exclude Used International Internet Bandwidth Capacities for Starlink until a clear position is reached on how to accommodate its capacity.

Used incoming international Internet bandwidth capacity increased by 7.99% from 504,778 Mbps recorded in the second quarter to 545,123 Mbps in the quarter under review, whereas used outgoing international Internet bandwidth capacity grew significantly by 18.53% from 170,823 Mbps to reach 202,485 Mbps in third quarter of 2025 signifying an increase in local uploads to the global Internet.

4.0 POSTAL & COURIER

4.1 POSTAL & COURIER VOLUMES

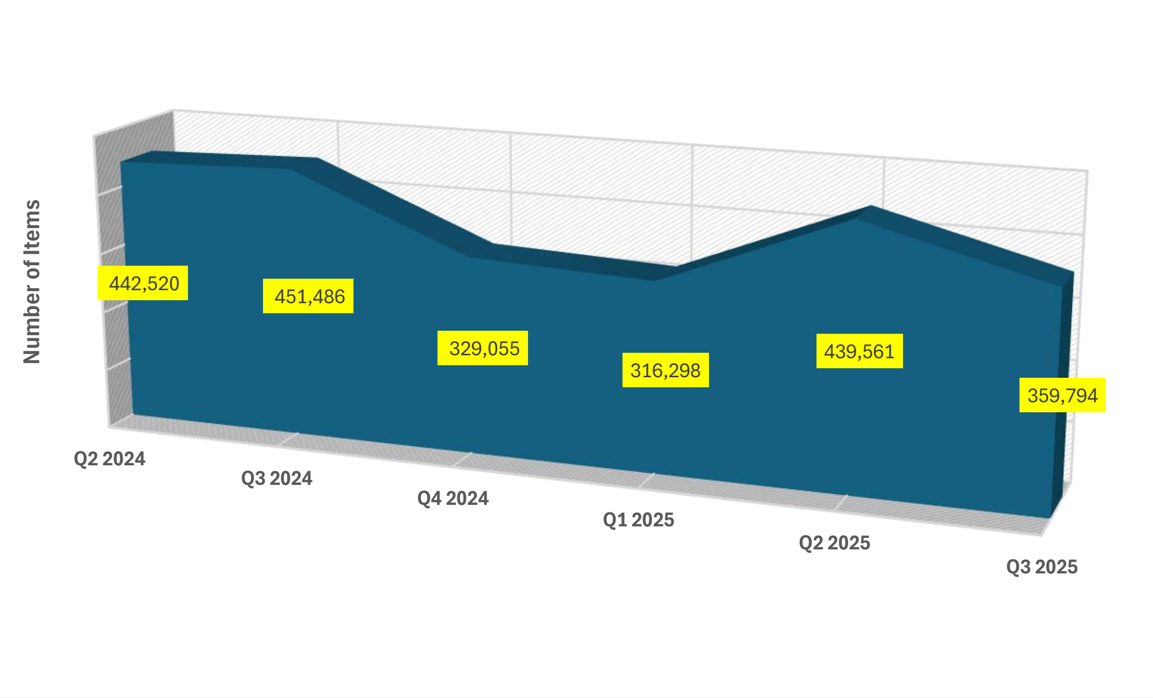
Postal and courier volumes saw a huge decline of 18.15% from 439,561 items recorded in the second quarter to 359,794 items in the third quarter of 2025. Notably letters into the country dropped drastically by 85.49% which has become a seasonal trend from the second to the third quarter of prior years. The quarterly comparison per postal/courier category is shown in Table 16 below:

Table 16: Postal and Courier Volumes

Service Category	Q2 2025	Q3 2025	Change (%)
Domestic postal letters	199,359	197,611	-0.88%
International incoming letters	47,401	6,876	-85.49%
International outgoing letters	5,019	5377	7.13%
Domestic courier	153,674	118,864	-22.65%
International incoming courier	19,832	20,762	4.69%
International outgoing courier	14,276	10,305	-27.82%
Total Postal & Courier	**439,561**	**359,794**	**-18.15%**

Figure 12 below depicts the Postal and Courier volumes trend from the second quarter of 2024 to the quarter under review.

Figure 12: Postal and Courier Volumes



4.2 POSTAL DENSITY

The total number of operational postal outlets remained at 281 in the quarter under review, however courier outlets decreased by 3 outlets from 213 recorded in the second quarter, to 210 in the third quarter of 2025. The distribution of courier outlets is tabulated below:

Table 17: Distribution of Courier Outlets

Operator	Q2 2025	Q3 2025	Net Addition
Overnight	8	8	-
UPS	16	16	-
Skynet	32	32	-
Unifreight	36	36	-
DHL	50	46	-4
FedEx	71	72	**1**
Total	**213**	**210**	**-3**

The decrease in postal and courier outlets, worsened the postal and courier density from 31,731 people per postal/courier outlet to 31,925 people per postal/courier outlet in the quarter under review as shown in the table below.

Table 18: Postal and Courier Density

Sector Outlets	Q2 2025	Q3 2025	Net Addition
Postal	281	281	-
Courier	213	210	-3
Total	**494**	**491**	**-3**
Postal and Courier Density	31,731	31,925	

4.3 POSTAL & COURIER REVENUE, COSTS & INVESTMENT

During the period under review, postal and courier revenue and operating costs increased by 5% and 5.8% respectively. Meanwhile capital expenditure declined significantly by 85.1% as shown in the table below:

Table 19: Postal & Courier Revenue, Costs & Capital Expenditure

Metric	Q2 2025	Q3 2025	Change (%)
Revenue	180,811,270	189,893,768	5.0%
Operating Costs	192,848,962	204,114,517	5.8%
Capital Expenditure	5,136,484	764,631	-85.1%
Cost - Income Ratio	106.7%	107.5%	0.8%

Cost to income ratio for the licensed postal and courier operators worsened by 0.8 percentage points from 106.7% recorded in the previous quarter to 107.5% in the third quarter of 2025.

5.0 OUTLOOK

The postal and telecommunication sector exhibits a multifaceted scenario characterised by increases in operational challenges for operators and growth dynamics of Key Performance Indicators (KPIs). Despite operators grappling with surges in operational costs, the sector continues to make strides as evidenced by exponential growths in KPIs like Internet and Broadband penetration rates. These movements present the hunger and need of the populace to engage digitally whilst driving economic development using ICTs. The recent approval of the National Artificial Intelligence (AI) strategy will position the country at the forefront of digital transformation as it focuses on enhancing skills and knowledge in AI to build capable workforce, develop necessary technological backbone to support AI systems and applications, and to encourage integration of AI technologies in various sectors such as education, healthcare and agriculture. This will drive economic and social development whilst encouraging ethical use and innovation in such sectors, underscoring the importance of the ICT sector as a key enabler for national development as envisaged in the National Development Strategies.

In trying to keep up with the growing demand for connectivity, operators are expected to continue expanding network infrastructure, with such investments aimed at improving network coverage, quality of service and network efficiency. The continuous deployment of next generation network infrastructure i.e. LTE and 5G base stations will not only serve the growing demand for connectivity by the populace but will also enhance overall user experience, greater digital inclusion and innovation.