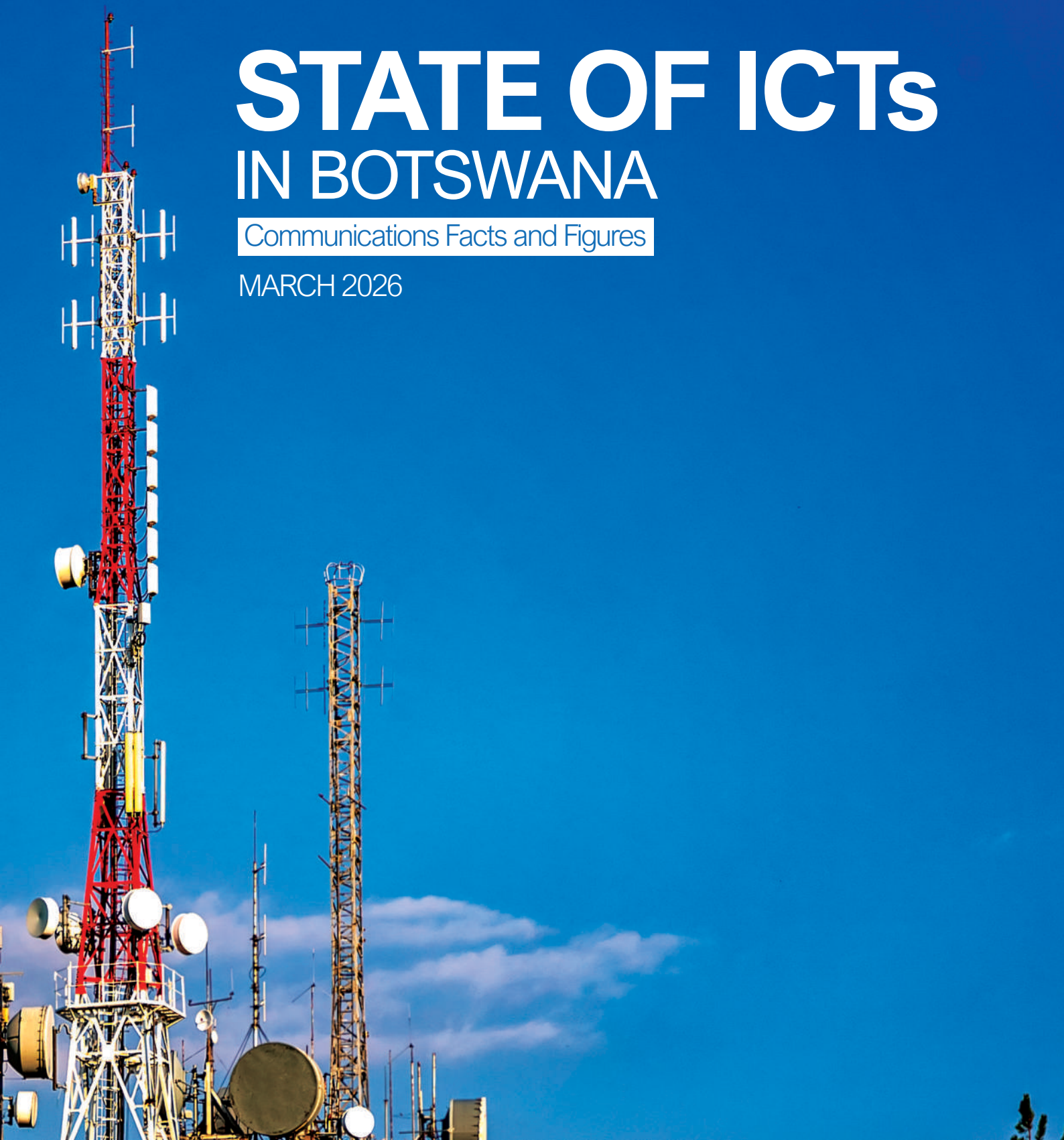
BOCRA

STATE OF ICTs IN BOTSWANA

Communications Facts and Figures

MARCH 2026



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FOREWORD

The yearly report on Communications Facts and Figures – The State of ICT in Botswana is a non-technical report providing information on ICT landscape in Botswana for the period ending September 2025. Building on the earlier publications, this report broadens its scope to cover other areas regulated by BOCRA such as postal and broadcasting services. In this regard, information about trends in the postal, broadcasting and telecommunications industries is provided in this paper. It also considers the efforts made by the Universal Access and Service Fund and other stakeholders to promote digitisation. The statistics and tables used in the report were produced using data from the service providers.

The publication serves as an educational resource and source of information for interested users including policy makers, ICT players, the academia and consumers of ICT services in general. In view thereof, the Authority continues to explore ways and means of improving both the report's content and structure to address the needs of the users.

INTRODUCTION

The report presents performance and developments of the communications market in Botswana. The focus is on the three sub-sectors that are regulated by BOCRA being Telecommunications / ICT, Postal and Broadcasting. The report covers various elements of the regulated entities being infrastructure, subscriptions, footprint, quality of service, services uptake and employment.

LICENSING

This section presents the statistical trend of licences issued in each sector for the period ending September 2025. During the period, seven (7) provisional licences were issued, bringing the total number of Provisional Licences in all the regulated sectors to forty-three (43), while Long-term Licences remained at two hundred and three (204).

Licensing of ICTs

The Authority did not issue any ICT licences during the period ending September 2025. As such, the total number of active Provisional Licences remained at twenty-five (25) for Service and Application Providers (SAPs) and six (6) for Network Facilities Providers (NFPs). The number of long-term Service and Application Provider (SAP) licences remains at one hundred and ten (110), while Network Facilities Provider (NFP) licences remain at forty-four (44).

Licensing of Postal Operators

The Authority did not issue any postal licences during the period under review. The total number of Provisional Postal Licences therefore remains at five (5), while long-term licences remain at thirty-one (31), inclusive of the Public Postal Operator.

Licensing of Broadcasting Operators

During the period ending September 2025, the Authority issued seven (7) non-commercial broadcasting licences to The Mega Church International, Eternal Foundation, Men and Boys for Gender Equality, Okavango Human Wildlife Foundation, Ngwato Development Trust, The Apostolic Faith Mission, and The Seventh-day Adventist (SDA) Church.

The Authority also issued one authorisation for an online radio station to Botswana University of Agriculture and Natural Resources (BUAN), and one authorisation for an online television station to Kiron Investments (Pty) Ltd trading as Lesedi Television. These approvals increased the total number of authorised stations to thirty-three (33), comprising thirteen (13) Internet Protocol Television (IPTV) operators and twenty (20) online radio broadcasters.

TELECOMMUNICATIONS SECTOR

The telecommunications market in Botswana continues to be dominated by three main operators offering a variety of services including fixed and mobile telephony, internet services and data, value-added services as well as international services. The three operators are Botswana Telecommunications Corporation Limited (BTC), Mascom Wireless Botswana (Pty) Ltd (Mascom) and Orange Botswana (Pty) Ltd (Orange).

In addition to these, there is Botswana Fibre Networks (BoFiNet) which provides wholesale services to the three operators as well as several Internet Service Providers (ISPs) which offer value-added services and internet.

BROADBAND DEPLOYMENT

International Connectivity

Botswana boasts of cutting edge international broadband capability that is anchored on the use of diverse sea-landing points, multiple Points of Presence abroad, cache capability, direct peering with global players and most importantly notable network redundancy. The capability is largely driven by BoFiNet, a state-owned enterprise with a mandate to provide Botswana with the necessary primary infrastructure for broadband connectivity, nationally and internationally.

To connect with the rest of the world, BoFiNet is a consortium member of both the West Africa Cable System (WACS) and the East Africa Submarine System (EASSy), with a shareholding of 4.5% and 4% respectively. The WACS links South Africa with the United Kingdom (UK) along the west coast of Africa. BoFiNet connects to this submarine cable in South Africa and Namibia. To connect to a Landing Station in South Africa there are two exit points being Tlokweng and Ramatlabama borders. Namibia connection is through Charleshill and Ngoma border posts. The EASSy connects African countries on the East coast of Africa, and it starts from South Africa up to Sudan. BoFiNet through its partners has extended the service to UK. BoFiNet connects to the submarine cable in South Africa where it starts. To connect to Landing Stations in South Africa, there are three exit points being Tlokweng, Lobatse and Ramatlabama borders.

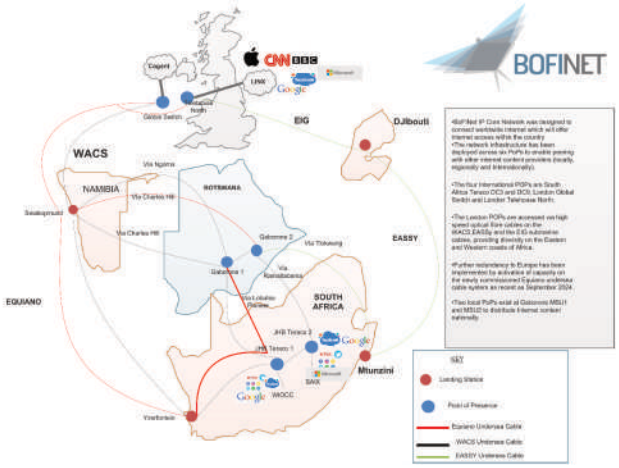


Figure 1: BOFINET INTERNATIONAL CONNECTIVITY. (Source: BOFINET, 2025)

Figure 1 presents the BoFiNet IP Core Network map, illustrating Botswana's international connectivity architecture. The map highlights key national points of presence, cross-border fibre routes through South Africa and Namibia, and the location of key landing stations such as Swakopmund, Mtunzini, and Djibouti. It further shows Botswana's integration with major sub-sea cable systems the WACS, EASSy, and Equiano as well as connectivity to international internet hubs and content providers in Europe.

National Connectivity

BoFiNet is the single largest internet wholesaler with about 220,000 Mbps incoming international bandwidth and 220,000 Mbps outgoing international internet bandwidth. Bandwidth represents the lit capacity actively provisioned to support Botswana's international internet traffic.

BoFiNet has national fibre coverage of more than 13,600 km countrywide connecting cities, major towns, and villages. Of this fibre, more than 4,800km is deployed in the access layer being local access and 8,800km along the backbone network. A total of 227 out of 399 localities are connected to high-speed open access network infrastructure, with a minimum of 1GB/s capacity to 1TB/s capacities per locality. The BoFiNet infrastructure is deployed for use by Public Telecommunications Operators (BTC, Mascom and Orange) and ISPs. Figure 2 below shows the fibre coverage across the country.

Figure 2: BoFiNet fibre map coverage in Botswana (Source: BoFiNet, 2025)

Apart from BoFiNet, other licensed Operators like Mascom, BTC, Liquid Telecom, and Paratus also have fibre coverage of more than *5,496km combined.*

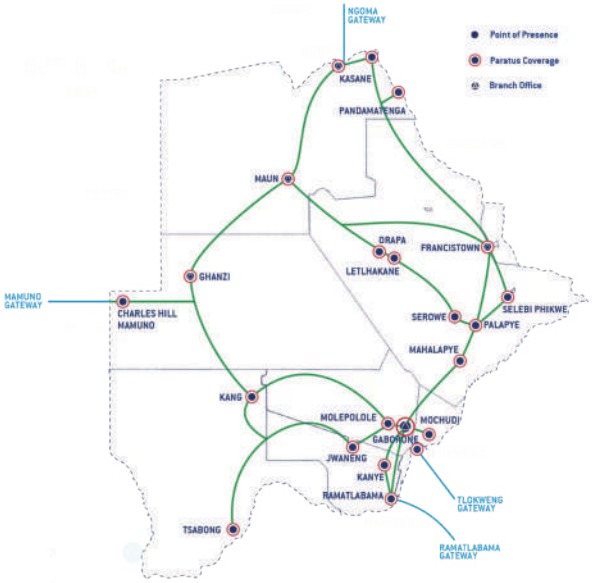


Figure 3: Paratus Botswana Fibre Coverage Map. (Source: Paratus Botswana, 2025)

Mobile Broadband Deployment

The diagrams below depict network coverage for 3G, 4G or Long-Term Evolution (LTE) and 5G by Mobile Network Operators in Botswana as at September 2025. The extensive network coverage is supported by 1,865 (One thousand eight hundred and sixty-five) 3G base stations, 2,266 (Two thousand two hundred and sixty-six) 4G/LTE base stations and 774 (Seven hundred and seventy-four) 5G base stations that are located at various sites across the country. There has been a growth in the number of base stations for all the technologies over the twelve months period ending September 2025. The increase in the base stations shows commitment by the Public Telecommunication Operators to achieve universal access and deploy resilient networks to cater for increased traffic volumes.

Mobile broadband delivery relies on the allocation of suitable high-demand spectrum. Each frequency band possesses distinct propagation characteristics, influencing the selection of technology and the scale of investment needed to meet coverage, capacity, and quality-of-service objectives.

The following graph illustrates various spectrum bands that have been released and are currently utilised to facilitate broadband deployment.

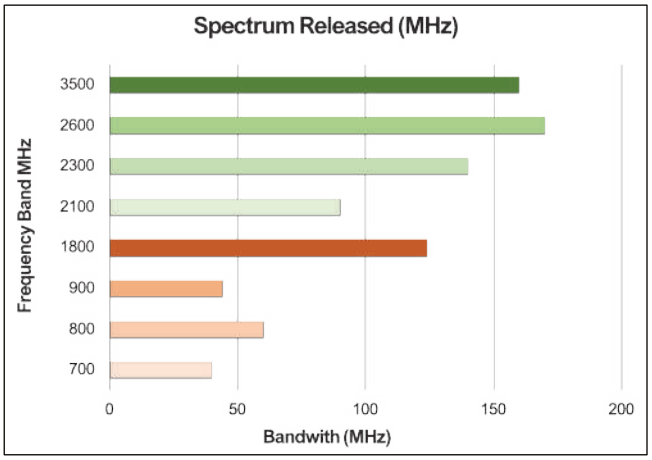


Figure 4: Spectrum Released. (Source: BOCRA, 2026)

Table 1 below shows a continued expansion of 4G and 5G infrastructure across all operators over the twelve-month period ending September 2025. 4G base stations recorded steady growth, increasing from 2,169 to 2,266, representing a 4% increase. More significantly, 5G deployment accelerated rapidly, with the number of base stations more than doubling from 337 to 744, reflecting investment in next-generation network capabilities. It is worth noting that BTC is decommissioning its 3G footprint, indicating a strategic shift towards more advanced technologies. However, BTC has not yet commenced 5G deployment, in contrast to the other operators that have already begun rolling out 5G infrastructure.

Table 1: Number of Base Stations per Technologies. (Source; BOCRA, 2025)

TECHNOLOGY	NETWORK OPERATOR	SEPT 24	SEPT 25
2G	BTC	702	794
	MASCOM	755	770
	ORANGE	815	873
	TOTAL	**2272**	**2401**
3G	BTC	215	180
	MASCOM	865	867
	ORANGE	798	818
	TOTAL	**1878**	**1865**
4G	BTC	586	618
	MASCOM	772	812
	ORANGE	811	836
	TOTAL	2169	2266
5G	BTC	-	-
	MASCOM	149	303
	ORANGE	188	441
	TOTAL	**337**	**744**

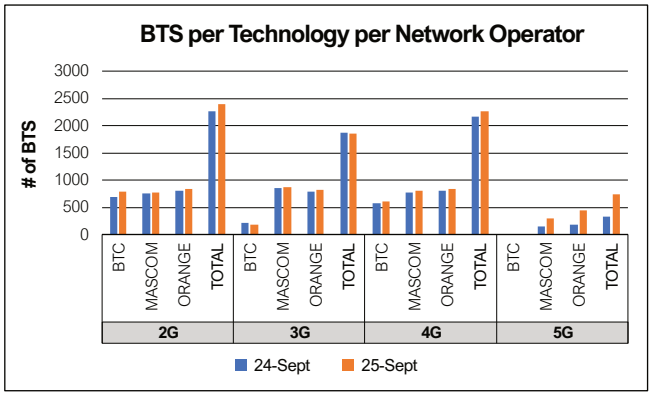


Figure 5: BTS per Technology per Network Operator. (Source; BOCRA, 2025)

Figures 6-13 illustrate the deployment of the 3G, 4G and 5G base stations by Mobile Network Operators.

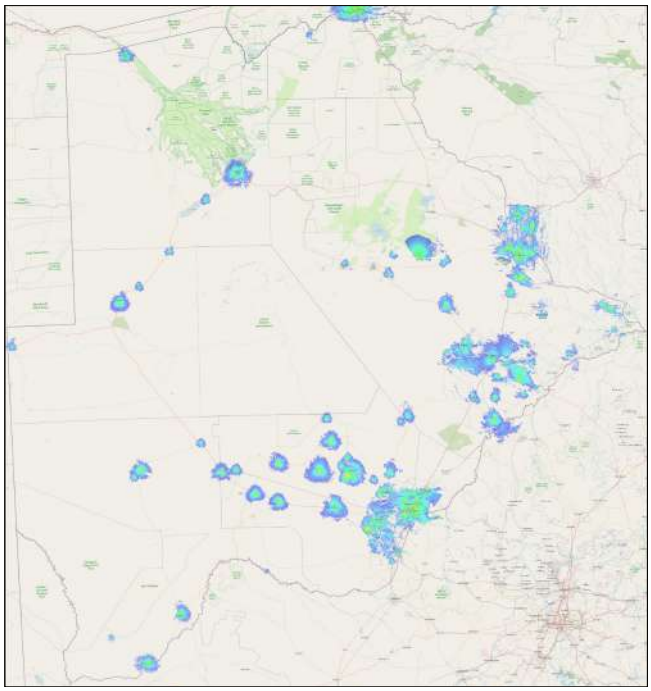


Figure 6: BTC 3G Coverage Map in Botswana. (Source: BOCRA, 2025)

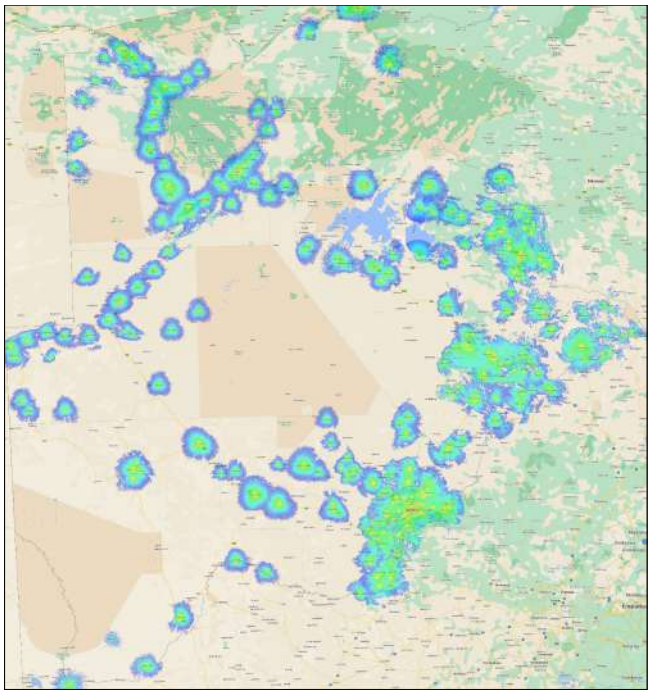


Figure 7: BTC 4G Coverage Map in Botswana. (Source: BOCRA, 2025)

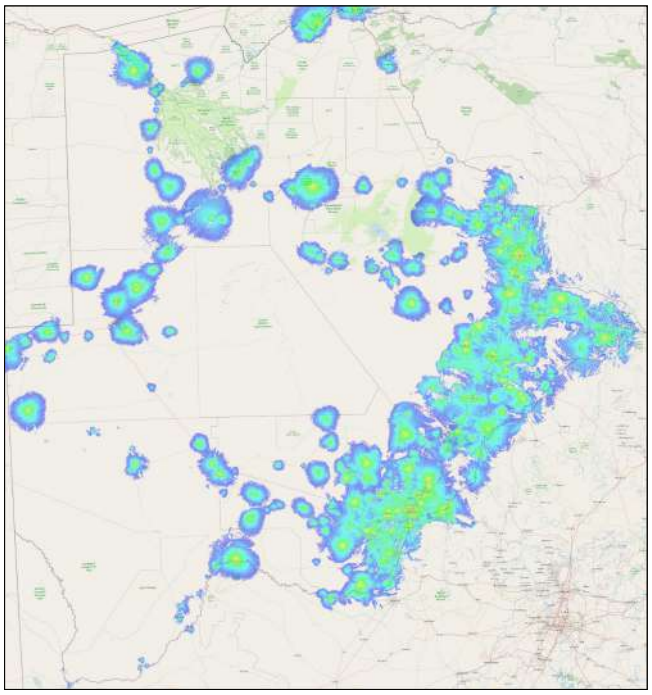


Figure 8: Mascom 3G Coverage Map in Botswana. (Source: BOCRA, 2025)

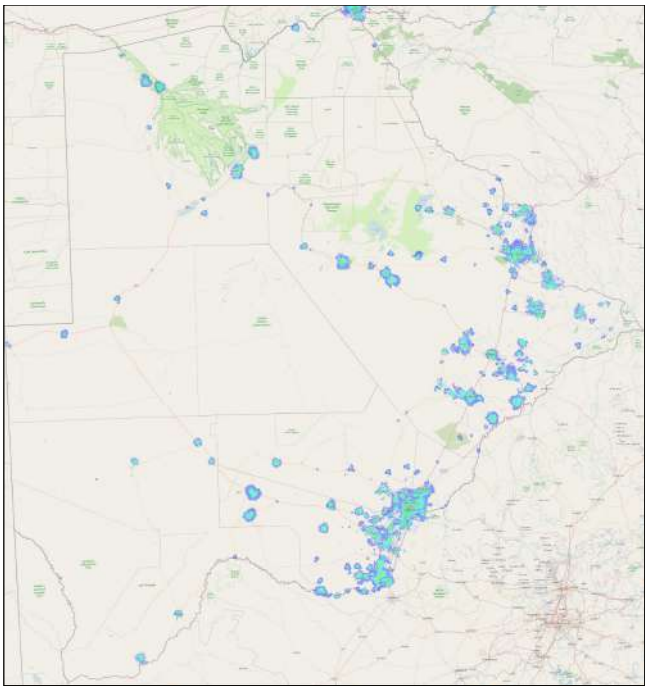


Figure 9: Mascom 4G Coverage Map in Botswana. (Source: BOCRA, 2025)

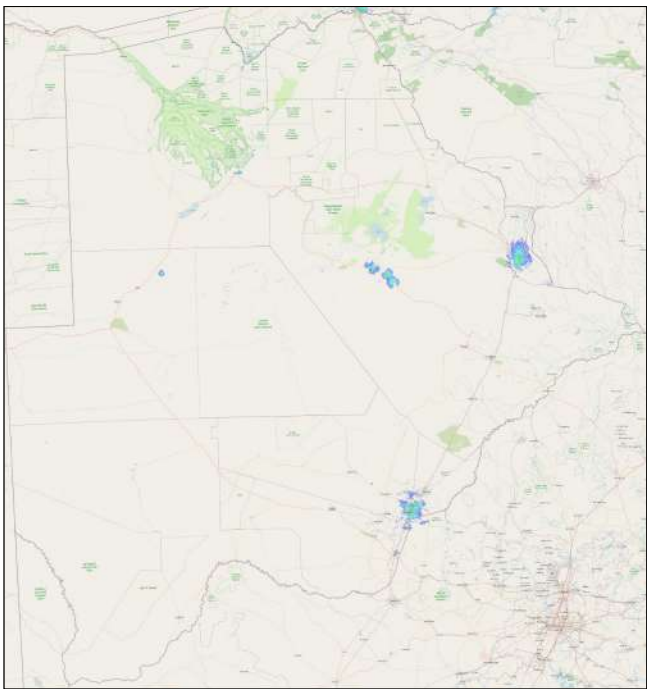


Figure 10: Mascom 5G Coverage Map in Botswana. (Source: BOCRA, 2025)

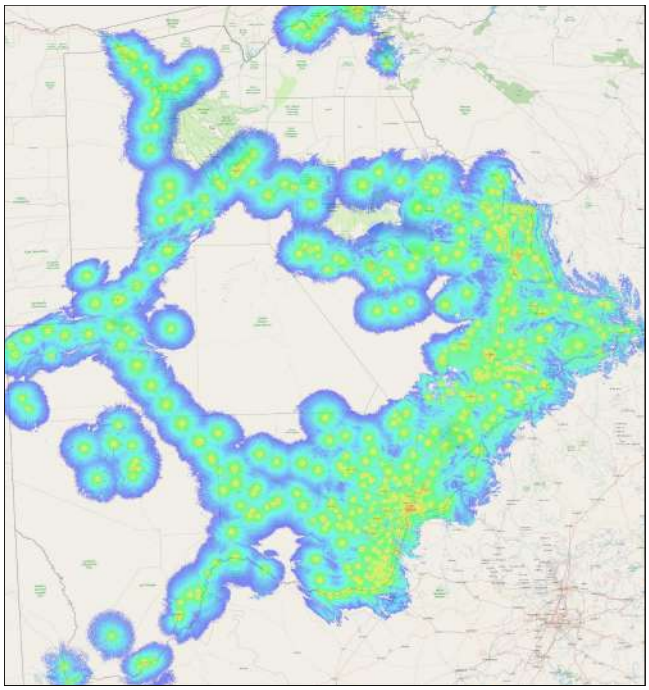


Figure 11: Orange 3G Coverage Map in Botswana. (Source: BOCRA, 2025)

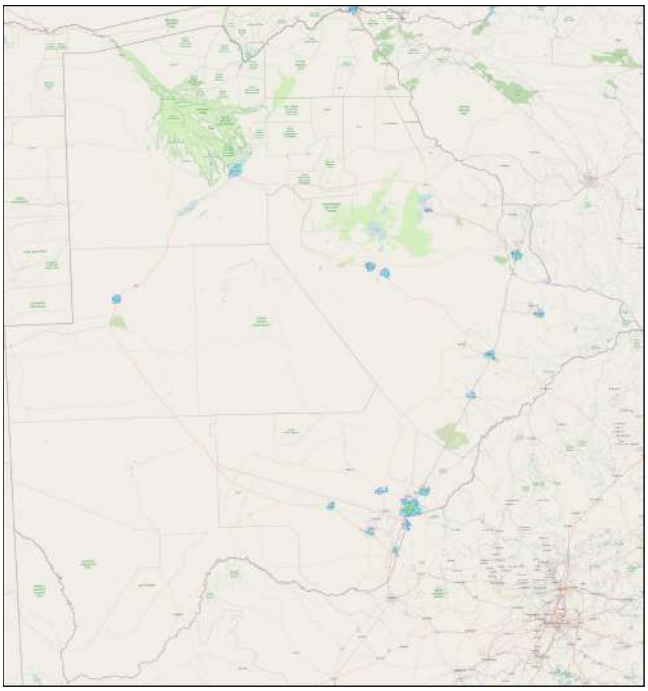


Figure 13: Orange 5G Coverage Map in Botswana. (Source: BOCRA,2025)

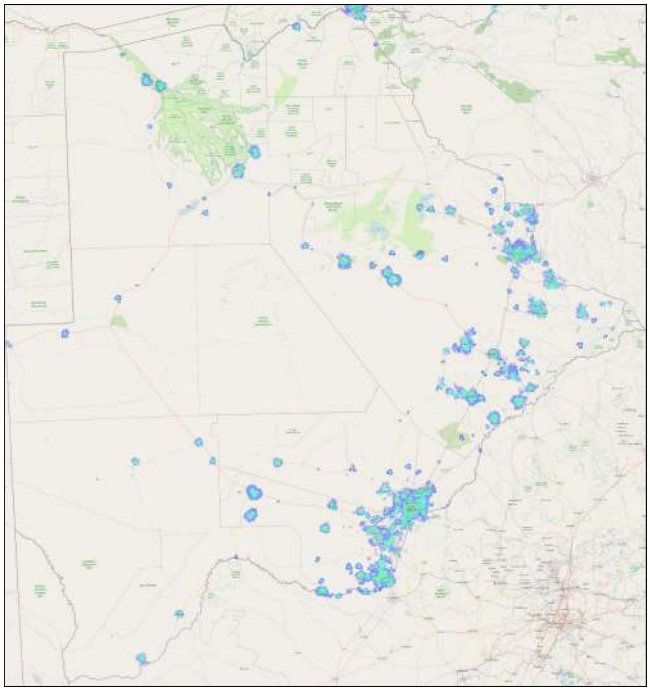


Figure 12: Orange 4G Coverage Map in Botswana. (Source: BOCRA, 2025)

QUALITY OF SERVICE AND QUALITY OF EXPERIENCE

BOCRA is charged with the responsibility of ensuring high standards of Quality of Service (QoS) within all communication networks and good Quality of Experience (QoE) by the consumers. The Quality of Service and Quality of Experience are measured using the following parameters:

a. Service Accessibility – refers to the availability of the network resources to support connections to the network and provide requested services to the users. This is measured using the Call Setup Success Rate (CSSR), a key performance indicator that reflects the proportion of successful call attempts relative to total attempts.

b. Service Retainability – refers to a measure of how the networks keep users' connections or the ability to hold and provide the services to the users. It is measured through Drop Call Rate in voice and Session Drop Rate in data.

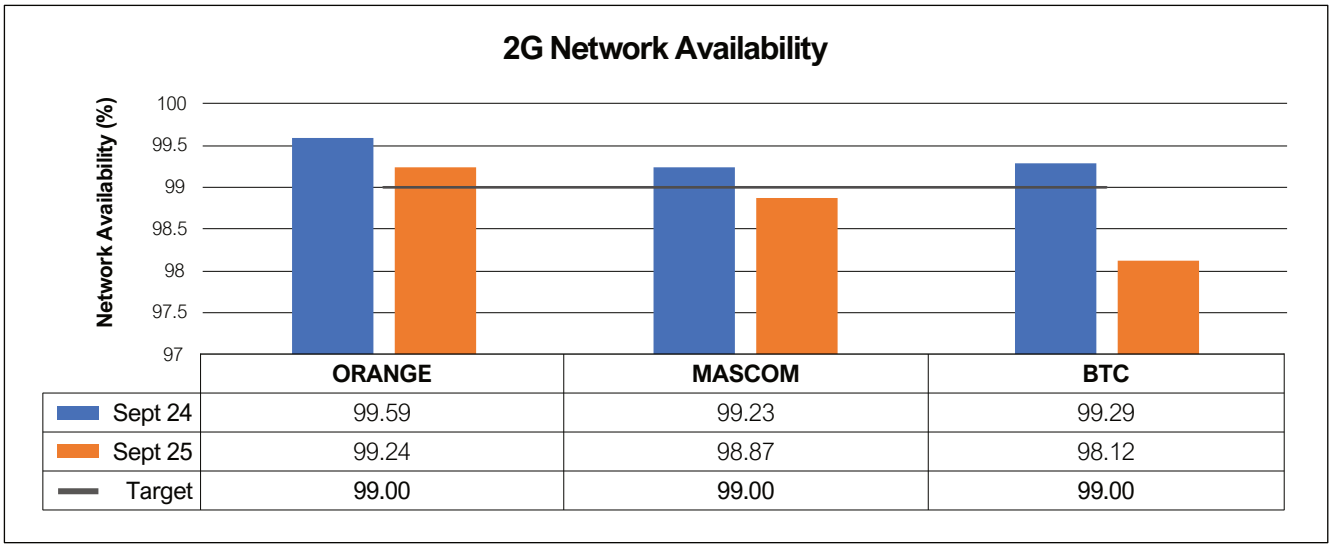
c. Service Integrity – refers to the character or honesty of the network to its users, such as what is the voice quality, throughput, and latency with which users were served. Mean Opinion Score KPI is used to measure voice service integrity while throughput is used for data services.

This section presents network performance for the three Mobile Network Operators (MNOs) for the twelve months period ending September 2025.

2G Voice Performance

Network Availability – Network Availability is the degree to which a network is operable and not in a state of failure or outage at any point in time.

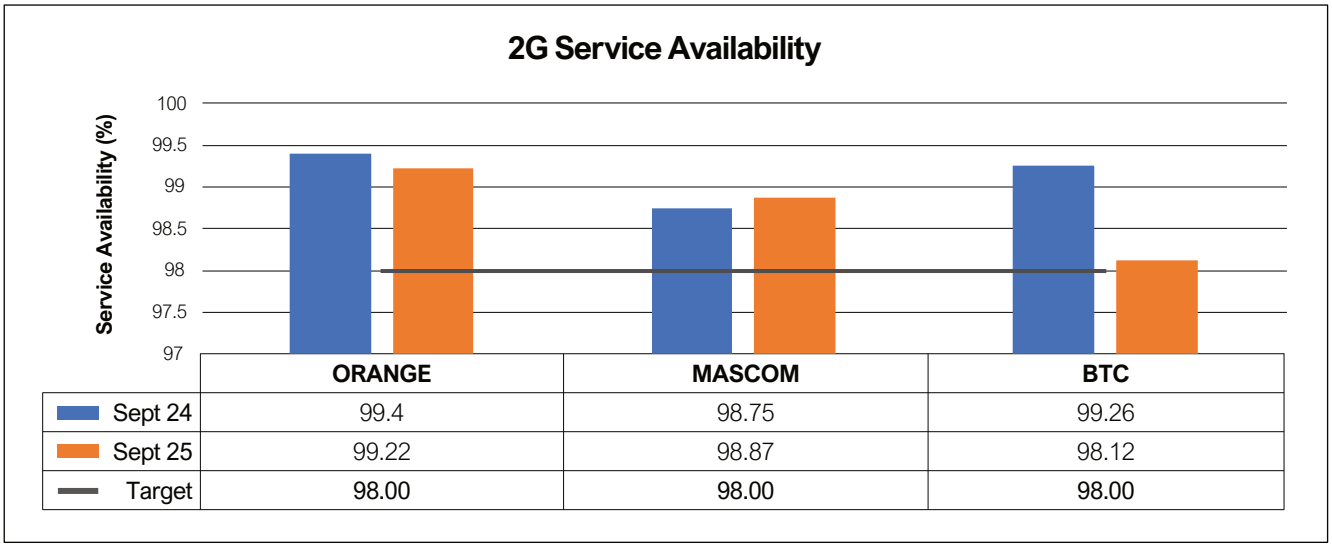
Only Orange met the Authority's national target of ≥ 99% for 2G network availability in September 2025. The under-performance by Mascom and BTC is attributable to power outages and a fire incident recorded at the BoFiNet exchange in Selibe Phikwe.



	ORANGE	MASCOM	BTC
Sept 24	99.59	99.23	99.29
Sept 25	99.24	98.87	98.12
Target	99.00	99.00	99.00

Figure 14: 2G National Network Availability for Orange, Mascom and BTC. (Source: BOCRA, 2025)

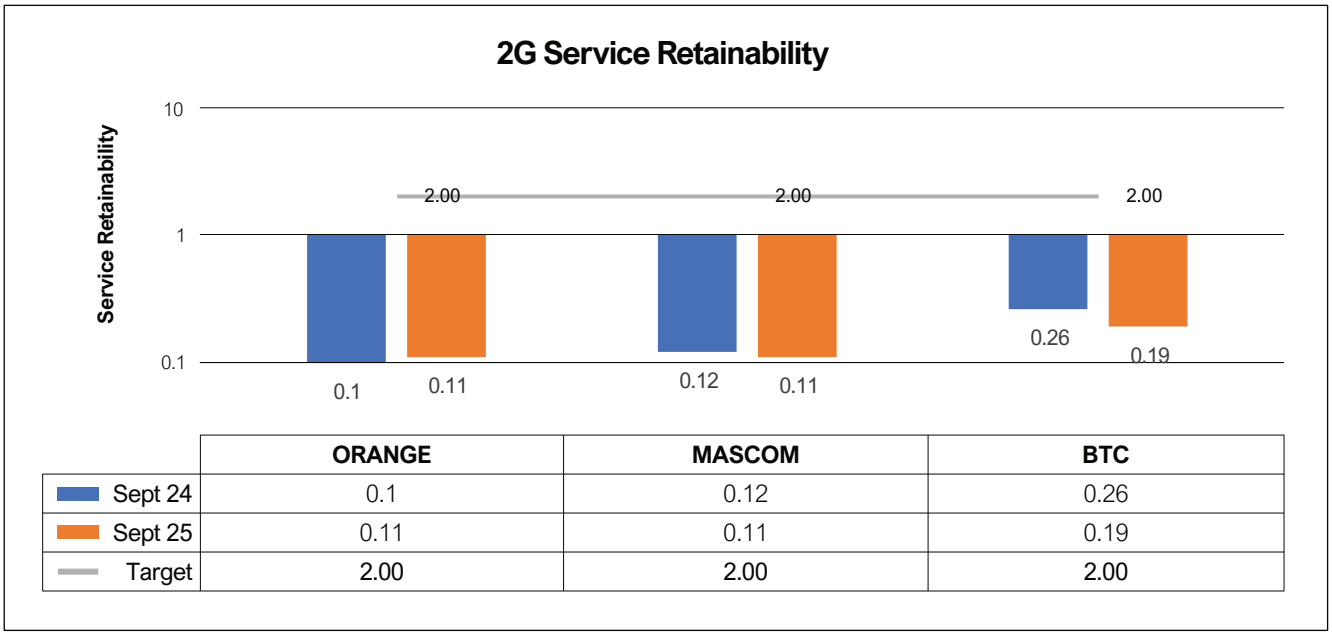
All mobile network operators consistently met the Authority's national target of ≥ 98% for 2G service accessibility during both periods.



	ORANGE	MASCOM	BTC
Sept 24	99.4	98.75	99.26
Sept 25	99.22	98.87	98.12
Target	98.00	98.00	98.00

Figure 15: 2G National Voice Service Accessibility for Orange, Mascom and BTC. (Source: BOCRA, 2025)

All mobile network operators consistently met the Authority's national target of ≤ 2% for 2G Voice service retainability for both periods.

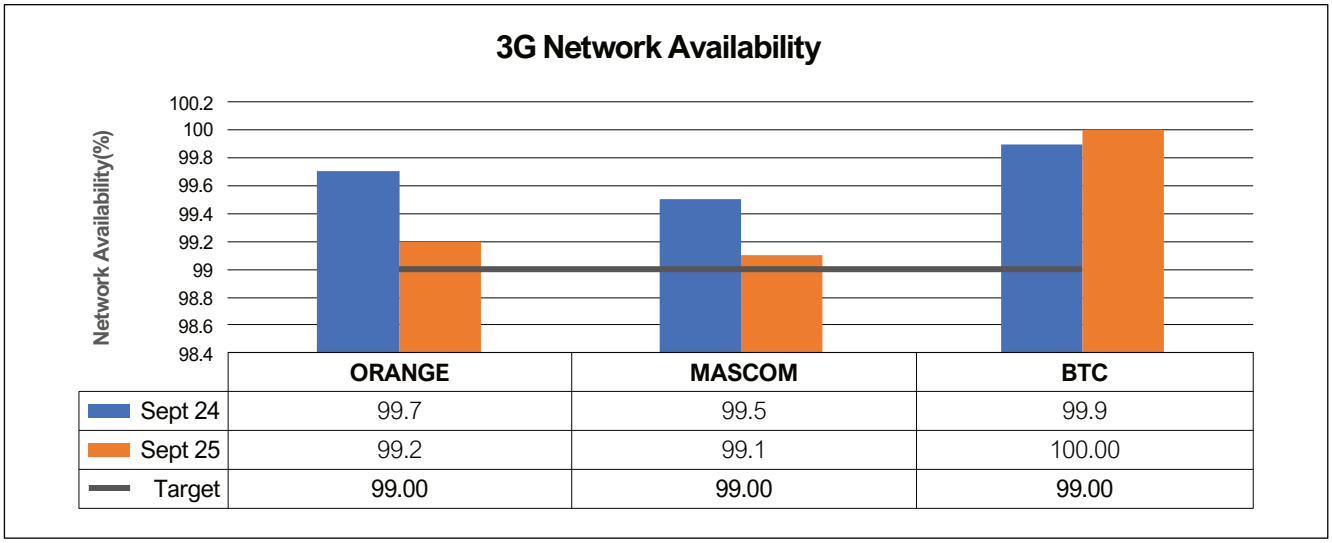


	ORANGE	MASCOM	BTC
Sept 24	0.1	0.12	0.26
Sept 25	0.11	0.11	0.19
Target	2.00	2.00	2.00

Figure 16: 2G National Voice Service Retainability for Orange, Mascom and BTC (Source: BOCRA, 2025)

3G Performance

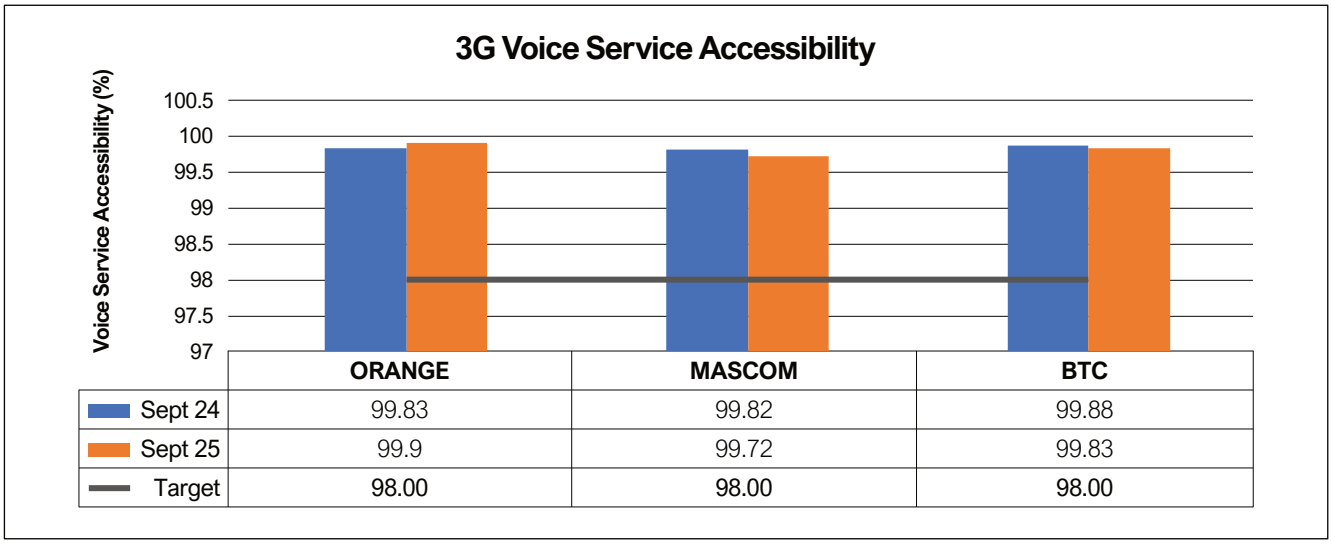
All mobile network operators demonstrated resilient network availability for both reporting periods.



	ORANGE	MASCOM	BTC
Sept 24	99.7	99.5	99.9
Sept 25	99.2	99.1	100.00
Target	99.00	99.00	99.00

Figure 17: 3G National Network Availability for Orange, Mascom and BTC. (Source: BOCRA, 2025)

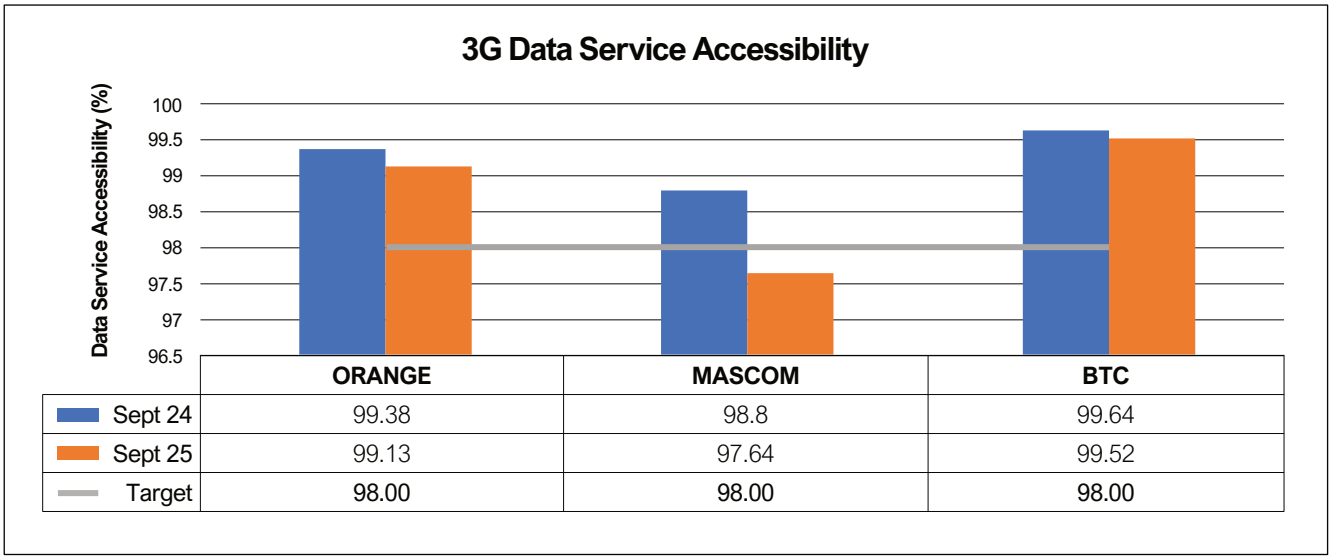
All mobile network operators achieved good performance in 3G voice service accessibility, consistently meeting the Authority's national target of ≥ 98% across all reporting periods.



	ORANGE	MASCOM	BTC
Sept 24	99.83	99.82	99.88
Sept 25	99.9	99.72	99.83
Target	98.00	98.00	98.00

Figure 18: 3G National Voice Service Accessibility for Orange, Mascom and BTC. (Source: BOCRA, 2025)

BTC and Orange consistently met the Authority's national target of ≥ 98% for 3G data service accessibility throughout the reporting period. However, Mascom did not meet the target in September 2025 due to power outages.



	ORANGE	MASCOM	BTC
Sept 24	99.38	98.8	99.64
Sept 25	99.13	97.64	99.52
Target	98.00	98.00	98.00

Figure 19: 3G National Data Service Accessibility for Orange, Mascom and BTC. (Source: BOCRA, 2025)

All mobile network operators met the Authority's national targets for 3G voice service retainability and 3G data service retainability throughout the reporting periods.

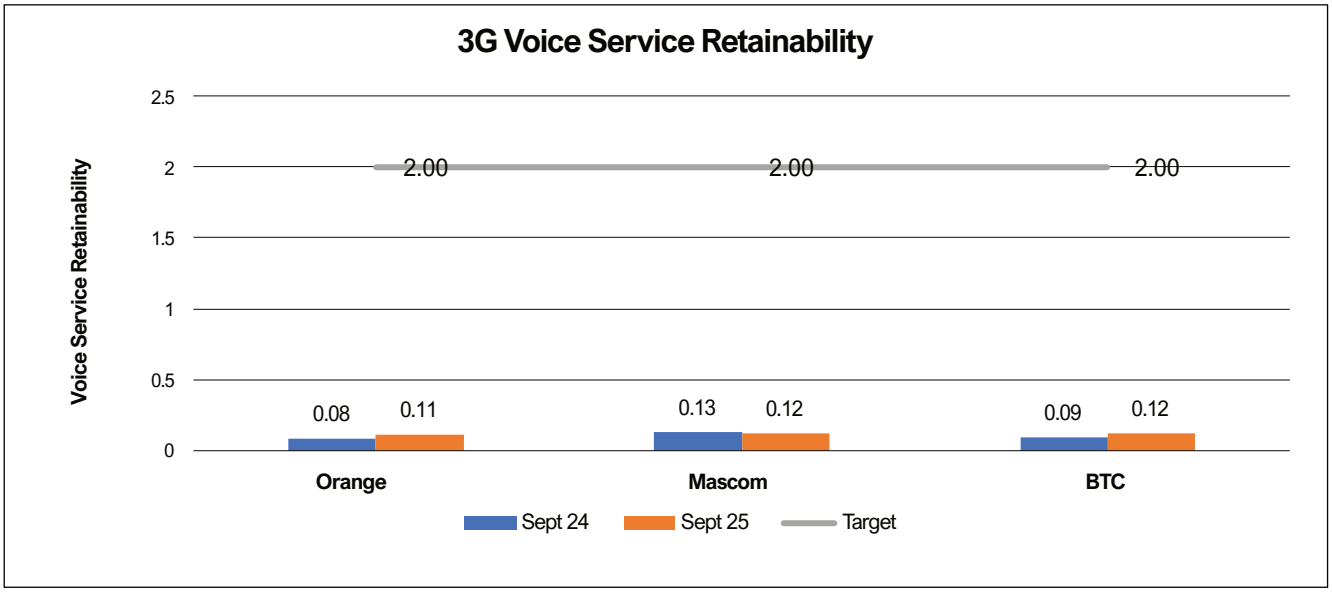


Figure 20: 3G National Voice Service Retainability for Orange, Mascom and BTC (Source: BOCRA, 2025)

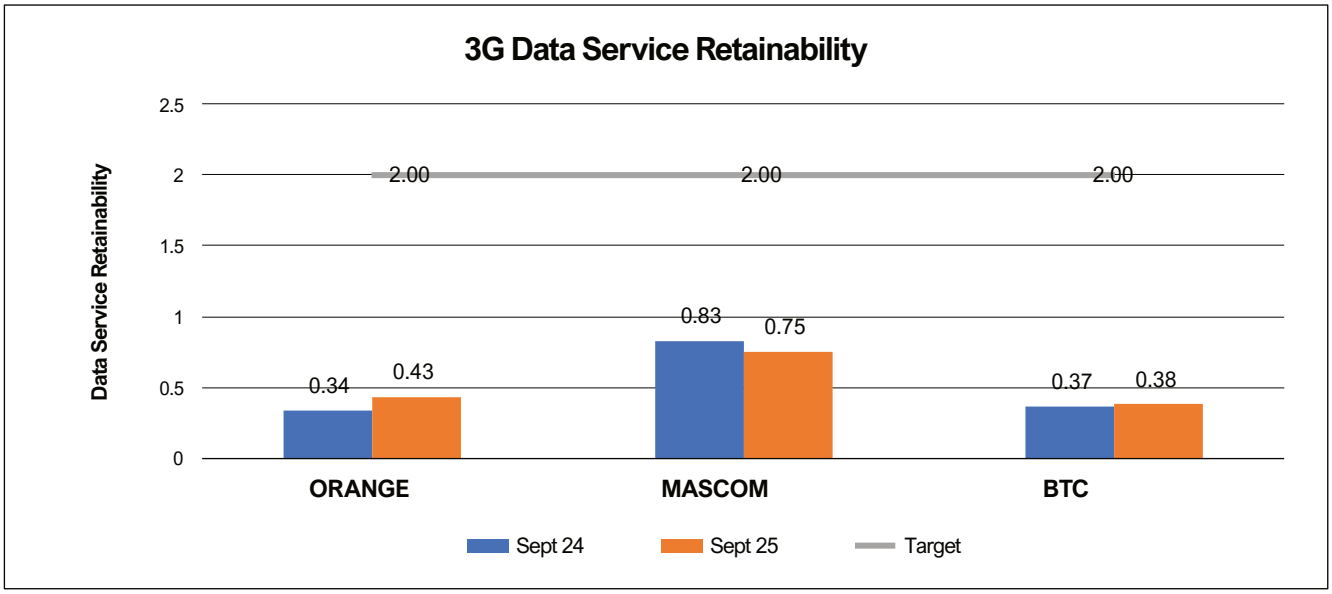
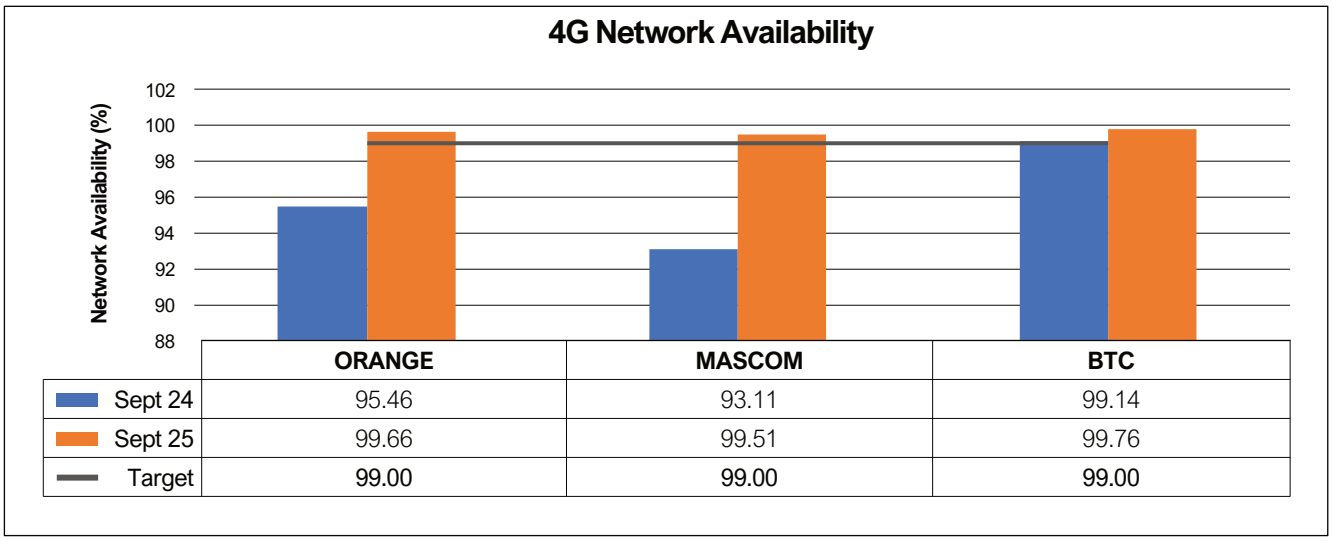


Figure 21: 3G National Data Service Retainability for Orange, Mascom and BTC (Source: BOCRA, 2024)

4G Data Performance

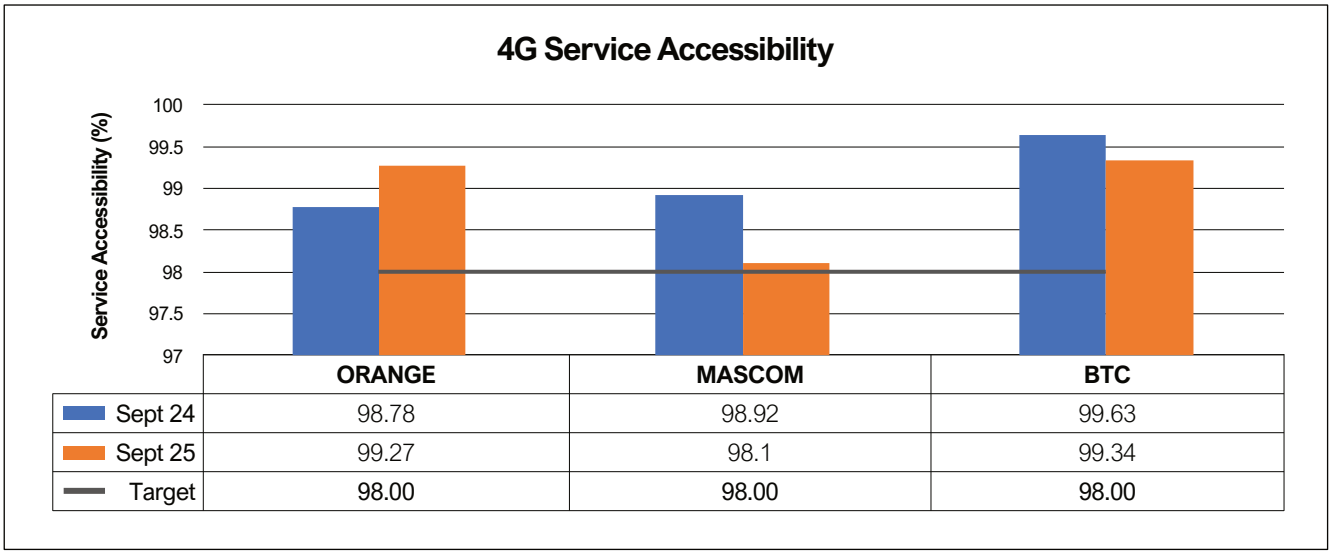
All operators exceeded the target showing improvement from September 2024 to September 2025.



	ORANGE	MASCOM	BTC
Sept 24	95.46	93.11	99.14
Sept 25	99.66	99.51	99.76
Target	99.00	99.00	99.00

Figure 22: 4G National Network Availability for Orange, Mascom and BTC (Source: BOCRA, 2025)

All three mobile network operators successfully met the Authority's national target of ≥ 98% throughout the reporting periods.



	ORANGE	MASCOM	BTC
Sept 24	98.78	98.92	99.63
Sept 25	99.27	98.1	99.34
Target	98.00	98.00	98.00

Figure 23: 4G Service Accessibility for Orange, Mascom and BTC (Source: BOCRA, 2025)

All mobile network operators met the Authority's national target of ≤ 2% for 4G data service retainability for the reporting periods.

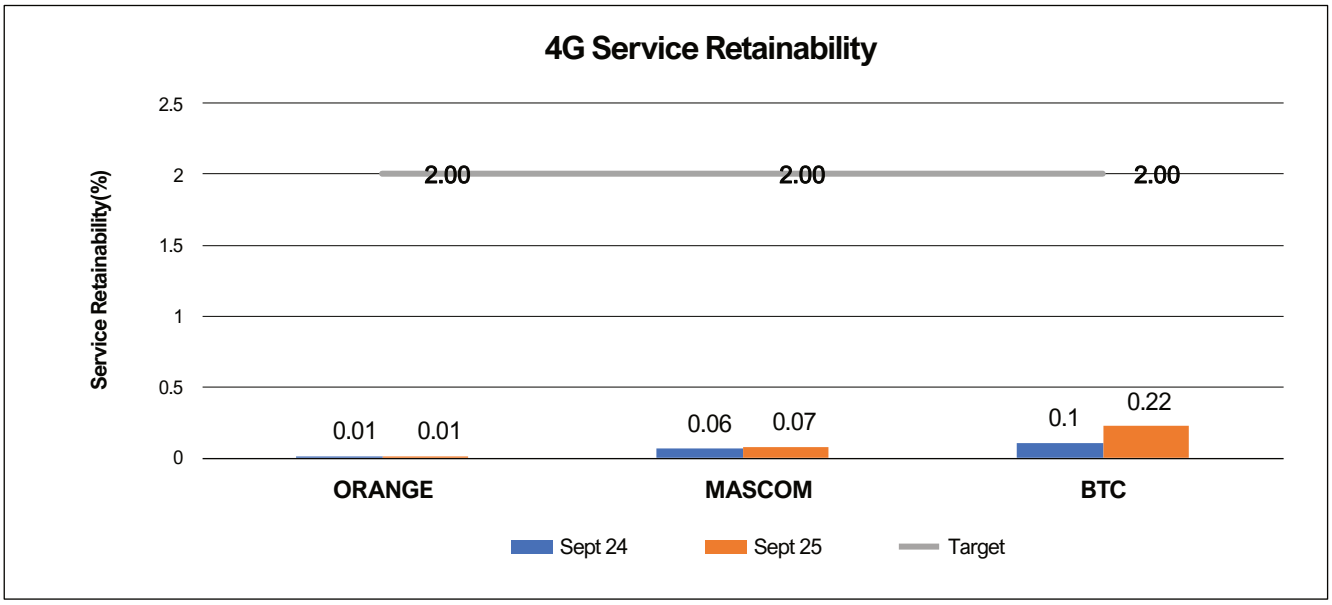
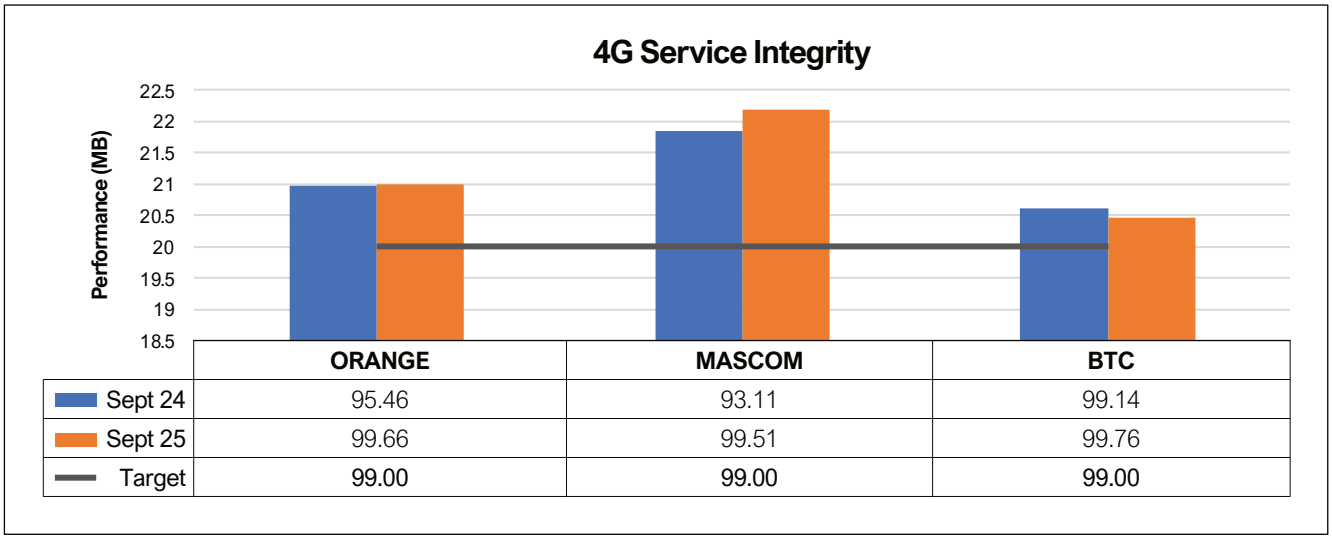


Figure 24: 4G National Service Retainability for Orange, Mascom and BTC (Source: BOCRA, 2025)

All mobile network operators consistently maintained service integrity, with each achieving average download speeds above the set target of 20 Mbps.



	ORANGE	MASCOM	BTC
Sept 24	95.46	93.11	99.14
Sept 25	99.66	99.51	99.76
Target	99.00	99.00	99.00

Figure 25: 4G Service Integrity for Orange, Mascom and BTC (Source: BOCRA,2025)

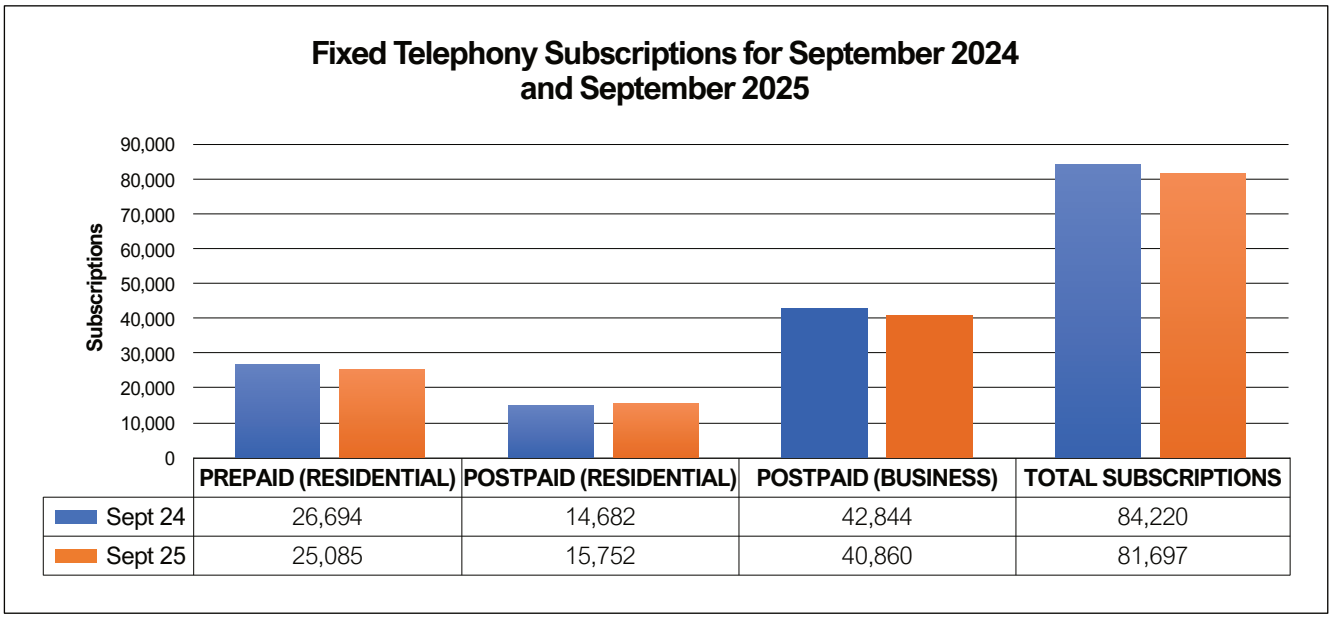
SUBSCRIPTIONS

This section on subscriptions highlights the demand for various services, including fixed telephony, mobile telephony, and mobile broadband, as well as mobile money services.

Fixed Telephony Subscriptions

The Botswana Telecommunications Corporation is the only fixed telephony provider in Botswana. Between September 2024 and September 2025, fixed telephony subscriptions reduced from 85,220 to 81,697 representing a 4.13% reduction.

Prepaid residential subscription experienced a decline from 26,694 subscriptions in September 2024 to 25,085 in September 2025. The declining trend is also evident for Postpaid Business subscriptions. The market forecasts indicate that the demand for fixed telephone services is unlikely to grow due to mobile substitution owing to the convenience associated with mobility and changing consumer behaviour.



	PREPAID (RESIDENTIAL)	POSTPAID (RESIDENTIAL)	POSTPAID (BUSINESS)	TOTAL SUBSCRIPTIONS
Sept 24	26,694	14,682	42,844	84,220
Sept 25	25,085	15,752	40,860	81,697

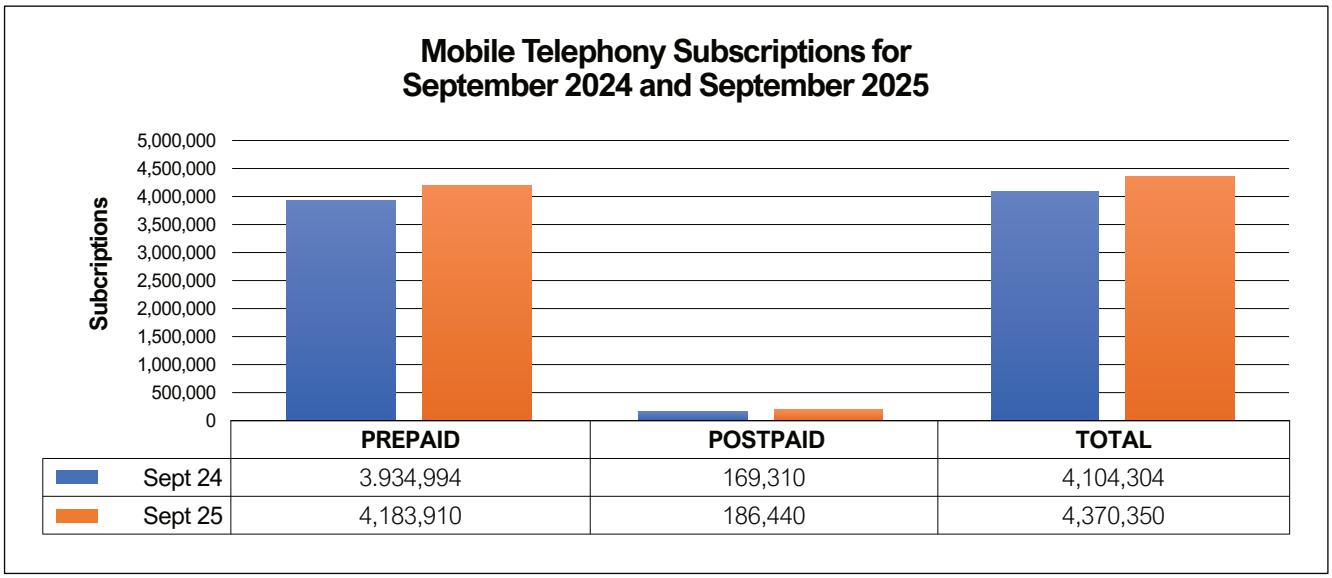
Figure 26: Fixed Telephony subscriptions (Source: BOCRA, 2025)

Mobile Telephony Subscriptions

Mobile Telephony subscriptions increased by 6% from 4,104,304 in September 2024 to 4,370,350 in September 2025. The mobile telephony market continues to be the service of choice due to its convenience and the variety of offerings from operators.

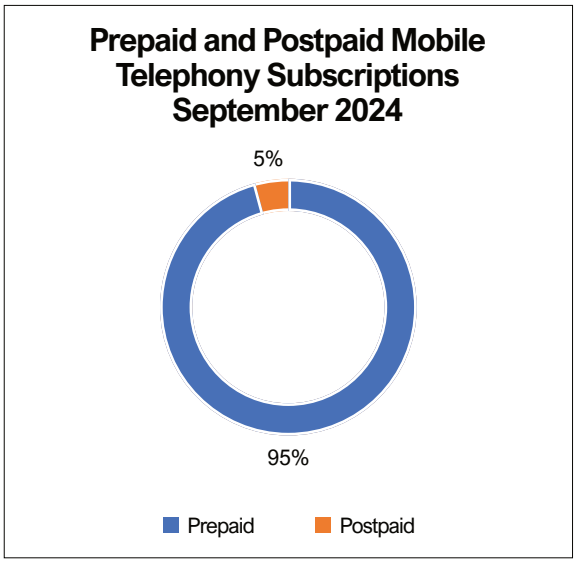
Prepaid mobile telephony subscriptions continued to out-number the postpaid subscriptions as consumers prefer prepaid services for the ease of tracking their usage while avoiding contractual obligations. By September 2025, the split between prepaid and postpaid mobile telephony subscriptions stood at 96% against 4% respectively.

Orange Botswana retained its position as market leader with a 45% market share, followed by Mascom at 40% and BTC Mobile at 15%.



	PREPAID	POSTPAID	TOTAL
Sept 24	3.934,994	169,310	4,104,304
Sept 25	4,183,910	186,440	4,370,350

Figure 27: Mobile Telephony subscriptions (Source: BOCRA, 2025)



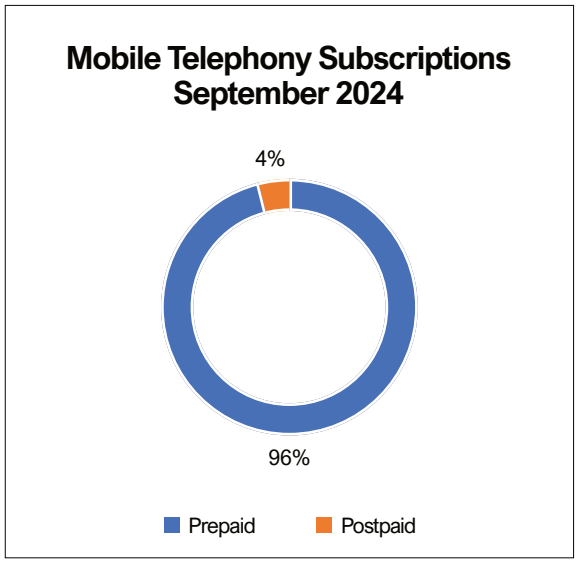
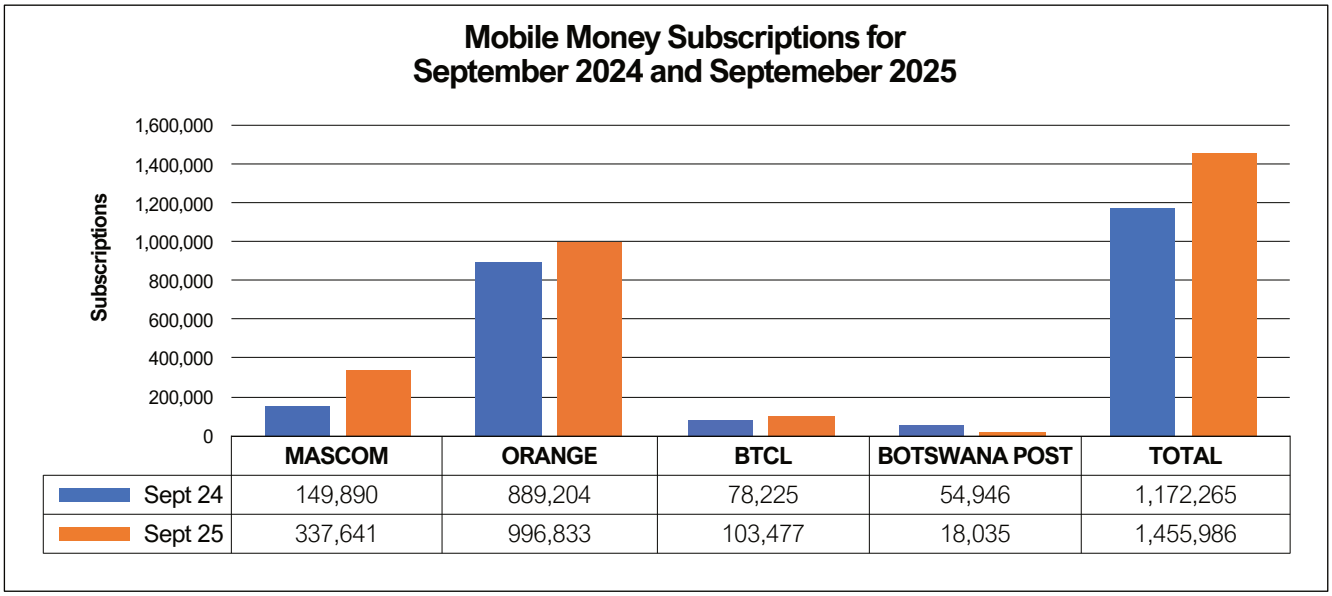


Figure 28: Prepaid and Postpaid Mobile Telephony Subscriptions in 2024 and 2025 (Source: BOCRA, 2025)

Mobile Money Subscriptions

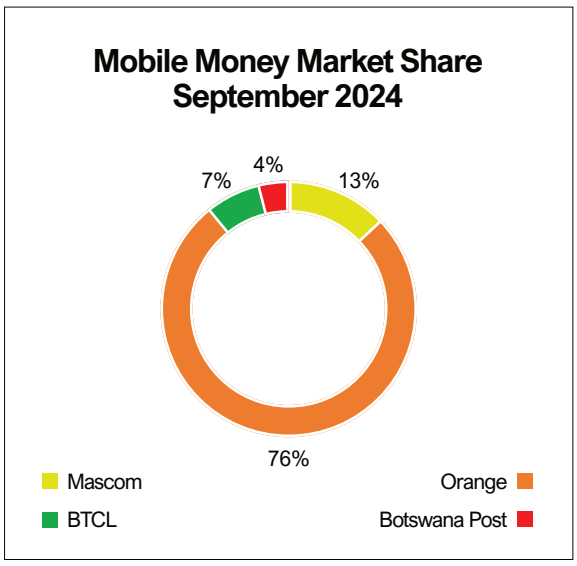
All the three mobile operators are players in the mobile money market, together with Botswana Post which began offering the service in 2018. The Figure below illustrates the number of active mobile money accounts during the preceding two years, showing a 24% increase in subscriptions from 1,172,265 in September 2024 to 1,455,986 in September 2025. As in the previous years, Orange Botswana continued to be the market leader with 68% of the market share, followed by Mascom Wireless with 23% share and BTC and Botswana Post trailing behind with 7% and 1% respectively. The decline in Poso Money accounts is attributable to the service outage due to a cyber-attack that Botswana Post experienced.

The growth in mobile money accounts is attributable to the wide acceptance of the service, driven by its convenience related to bill payments, service subscriptions and money transfers as well as interoperability with traditional banking services.



	MASCOM	ORANGE	BTCL	BOTSWANA POST	TOTAL
Sept 24	149,890	889,204	78,225	54,946	1,172,265
Sept 25	337,641	996,833	103,477	18,035	1,455,986

Figure 29: Mobile Money Subscriptions (Source: BOCRA, 2025)



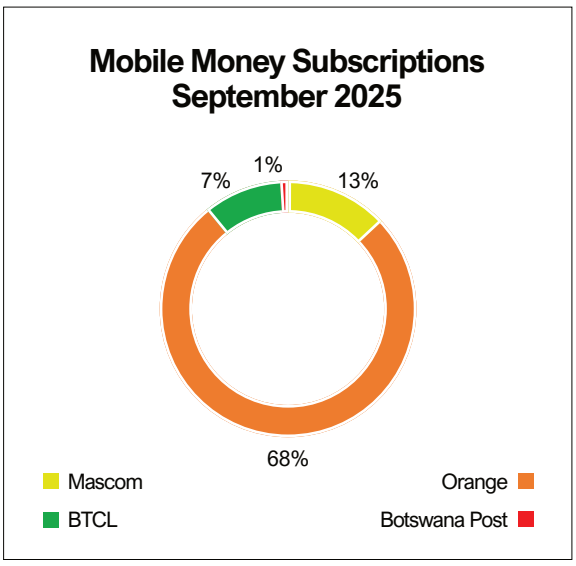
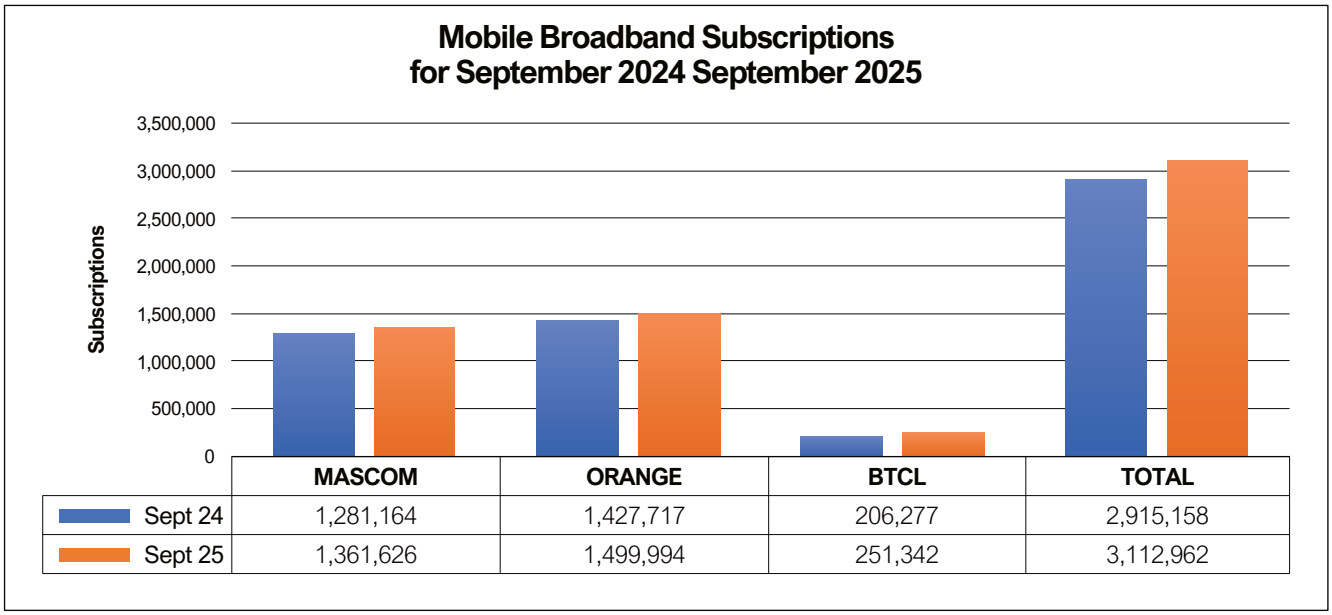


Figure 30: Mobile Money Market Shares for September 2024 and September 2025 (Source: BOCRA 2025

Mobile Broadband Subscriptions

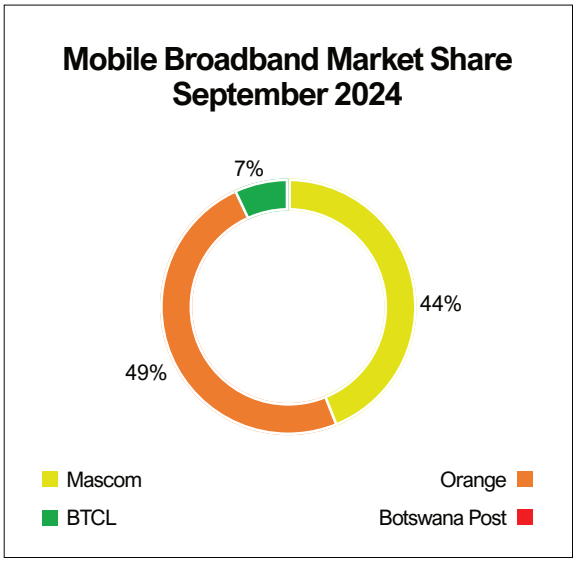
The number of mobile broadband subscriptions has increased by 7%, from 2,915,158 in September 2024 to 3,112,962 subscriptions in September 2025. The increase in the uptake of mobile broadband is attributable to several factors including ownership of more than one SIM-card by consumers to enjoy different offers by operators; improved affordability due to price reductions; increase in use of electronic payment platforms as well as availability of government services online.



	MASCOM	ORANGE	BTCL	TOTAL
Sept 24	1,281,164	1,427,717	206,277	2,915,158
Sept 25	1,361,626	1,499,994	251,342	3,112,962

Figure 31: Mobile Broadband (Source: BOCRA, 2025)

Orange Botswana retained its market leadership with a 48% share, recording a 5.06% growth (1,427,717 to 1,499,994), while Mascom recorded a 6.28% increase to 1,361,626 from 1,281,164 and holding a 44% market share. BTC recorded the highest increase of 21.84%, reaching 251,342 subscriptions from 206,277 and held an 8% market share.



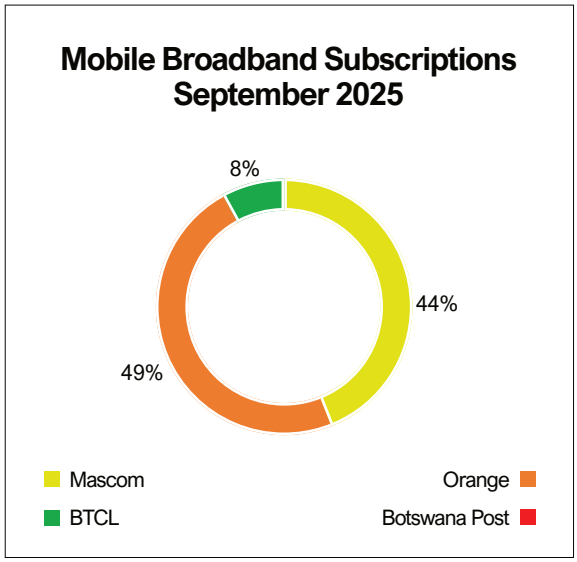


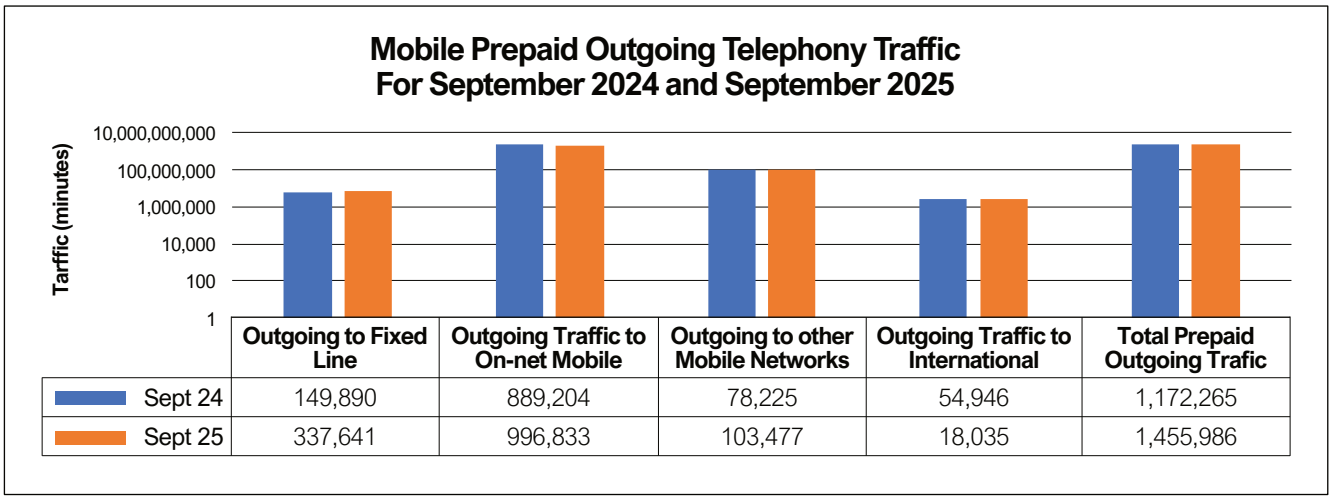
Figure 32: Mobile Broadband Market Shares for 2024 and 2025 (Source: BOCRA, 2025)

Mobile Telephony Traffic

This section on traffic presents the usage patterns of various services, including voice, SMS, and data. While the previous section focused on the number of users subscribed to different services, this section examines how those services are used by subscribers. It therefore provides insight into the volume of traffic generated across networks and helps illustrate trends in consumer usage behaviour.

Mobile Telephony Prepaid Traffic

Total mobile prepaid voice traffic has experienced a decline over the years. Total mobile prepaid voice traffic declined from 2.3 billion minutes in September 2024 to 2.2 billion minutes in September 2025. Outgoing traffic to fixed lines experienced a modest increase of 13% while outgoing to on-net mobile, other mobile networks as well as international outgoing traffic all registered slight declines. This trend is indicative of a gradual shift in consumer communication behaviour, with increased adoption of over-the-top (OTT) communication services and data-based messaging platforms substituting traditional voice services.

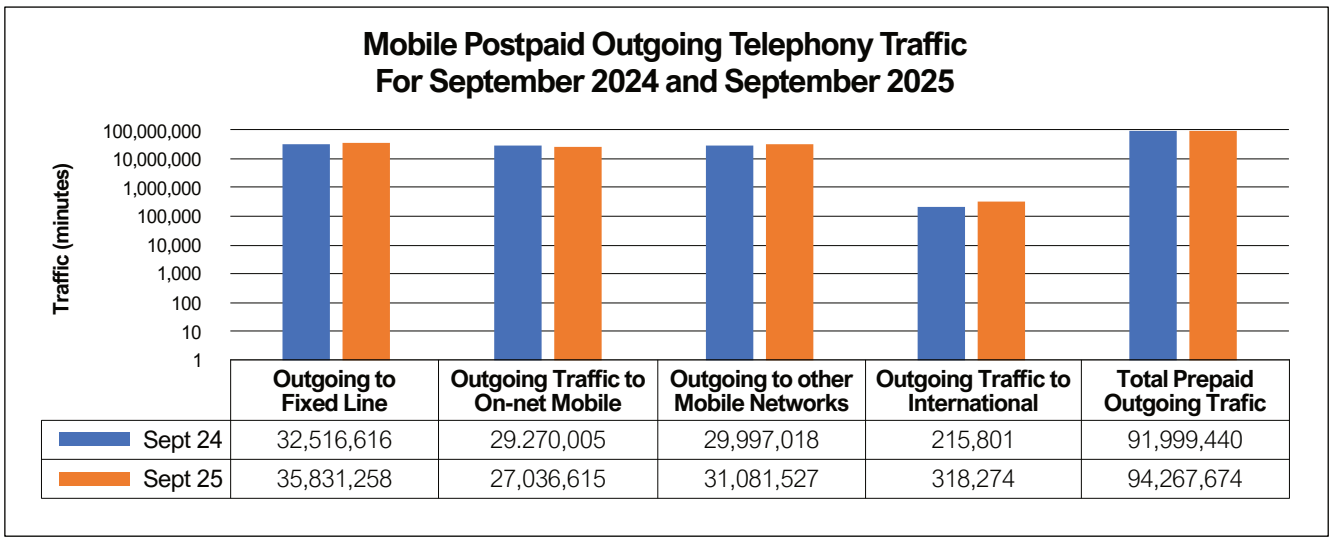


	Outgoing to Fixed Line	Outgoing Traffic to On-net Mobile	Outgoing to other Mobile Networks	Outgoing Traffic to International	Total Prepaid Outgoing Trafic
Sept 24	149,890	889,204	78,225	54,946	1,172,265
Sept 25	337,641	996,833	103,477	18,035	1,455,986

Figure 33: Mobile Prepaid Outgoing Telephony Traffic. (Source: BOCRA, 2025)

Mobile Telephony Postpaid Traffic

Total mobile postpaid voice traffic recorded a marginal increase of 2% between September 2024 and September 2025 rising from 91 million minutes to 94 million minutes. Outgoing traffic to fixed lines, outgoing to other mobile networks as well as outgoing to international destinations all registered modest growth. In contrast, outgoing traffic to on-net mobile traffic experienced a decline out of all the categories.



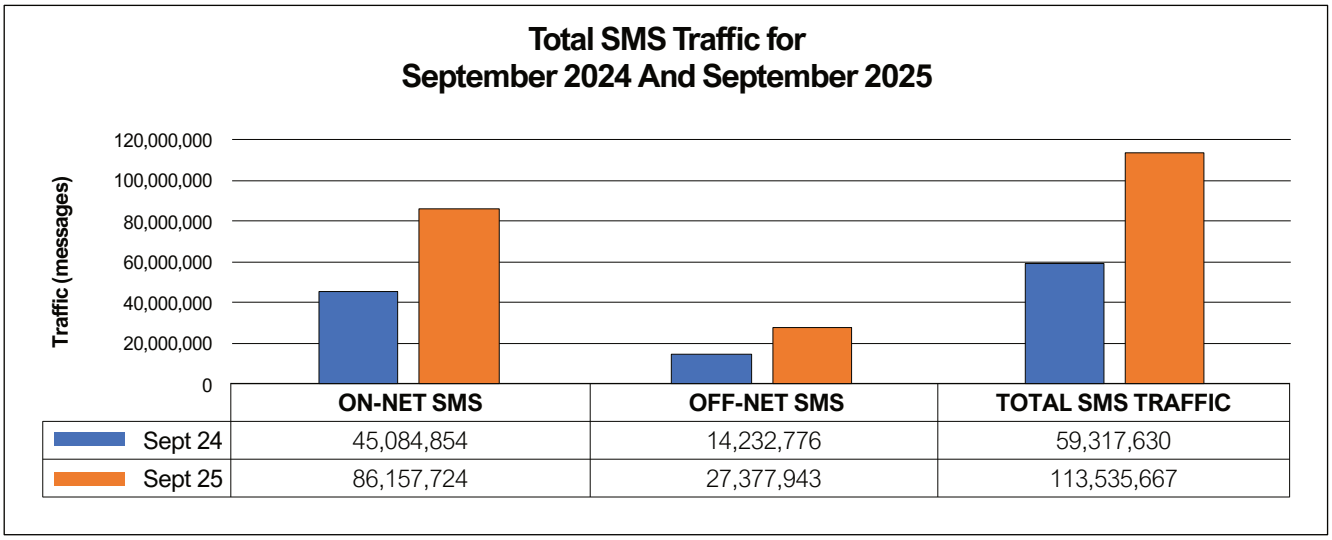
	Outgoing to Fixed Line	Outgoing Traffic to On-net Mobile	Outgoing to other Mobile Networks	Outgoing Traffic to International	Total Prepaid Outgoing Trafic
Sept 24	32,516,616	29.270,005	29,997,018	215,801	91,999,440
Sept 25	35,831,258	27,036,615	31,081,527	318,274	94,267,674

Figure 34: Mobile Postpaid Outgoing Telephony Traffic. (Source: BOCRA, 2025)

SHORT MESSAGE SERVICE (SMS) TRAFFIC

Prepaid SMS Traffic

Total SMS traffic (both prepaid and postpaid) recorded a significant increase between September 2024 and September 2025, rising from 40,937,725 messages to 115,535,667 messages, representing an increase of approximately 182%. The increase in SMS traffic may be attributed to the growing use of SMS for one-time passwords (OTPs), financial transactions, promotional messaging, and service notifications, particularly by digital platforms and financial service providers.



	ON-NET SMS	OFF-NET SMS	TOTAL SMS TRAFFIC
Sept 24	45,084,854	14,232,776	59,317,630
Sept 25	86,157,724	27,377,943	113,535,667

Figure 35: Total Prepaid & Postpaid SMS Traffic (Source: BOCRA, 2025)

THE IMPACT OF THE TELECOMMUNICATIONS SECTOR IN THE ECONOMY

The telecommunications sector plays a vital role in the development of a country. This section highlights the sector's contribution in terms of employment and revenue for the three MNOs and BOFINET.

Employment in the Telecommunications Sector

The telecommunications sector plays an important role in creating jobs for Batswana. As of September 2025, at least 1961 people were employed in the sector, which was an increase from 1789 recorded in September 2024.

Revenue and Investment in the Telecommunications Sector

Telecommunications sector revenues increased from atleast BWP 5,273,527,431.00 to atleast BWP 5,426,440,601.20 as at September 2025, reflecting a modest growth of 3%. In contrast, sector investment declined by 6%, falling from BWP 780,087,200.00 in September 2024 to BWP 735,209,255.00 in September 2025.

THE ROLE OF THE UASF IN IMPROVING DIGITISATION IN BOTSWANA

The Universal Access and Service Fund (UASF or the Fund) is a development agency mandated to ensure availability of communications services across the country, primarily focusing on unserved and underserved areas. Universal access and service is achieved through the provision of financial incentives such as subsidies or grants to service providers to reduce the cost of delivering services to the unserved and underserved areas.

The Fund collects a levy of 1% of the annual gross turnover fees on regulated services from selected licensed service providers within the communications sector. The levied service providers include Mobile Network Operators, Private Broadcasters, and the Public Postal Operator. BOCRA contributes its annual surplus revenues to the Fund. BOCRA serves as the secretariat to the UASF.

During the 2025/26 financial year, the UASF continued to expand connectivity and digital inclusion initiatives across Botswana, with emphasis on underserved communities.

Broadband Internet services were maintained across schools, clinics and Dikgotla in Kgalagadi, Ghanzi, Mabutsane, Kweneng, Southern, North-West and Okavango districts. Overall service availability averaged 90%, with full connectivity achieved in Mabutsane and the 4 Centres for the Disadvantaged in Kweneng and North-West District, and for Tsodilo Hills Heritage Centre, while North-West/Okavango recorded the lowest availability at 67% due to network transmission outages and power supply challenges. The connectivity has improved communication, supported digital learning, enabled research and administrative efficiency, and enhanced service delivery in public institutions.

The Fund is facilitating deployment of voice and mobile broadband services to 62 villages across Tutume, North-East, Tonota, Boteti, Palapye, Mahalapye, Kgatleng and Ramotswa. By September 2025, 2 villages had been connected, with works ongoing following approved contract extensions due to project delays. Progress was affected by delays in electricity connections attributed to shortages of meters. Once completed, the project is expected to enhance access to public services, support mobile financial inclusion, stimulate local enterprise development, and improve employment opportunities

Deployment of network infrastructure along strategic major highway corridors continued, with 23 of the targeted 26 sites completed and operational by September 2025. The improved coverage enhances road safety and emergency response, strengthens trade and logistics communications, and supports economic activity along major routes.

PROGRESS OF THE SADC BROADBAND 2025 INDICATORS

SADC Member States agreed on targets pertaining to ten broadband indicators to be achieved by 2025. The table below shows Botswana's performance in achieving these targets.

Table 2: Botswana Progress on the SADC Broadband Indicators 2025. (Source: BOCRA,2025)

	INDICATOR	SADC TARGET	BOTSWANA PROGRESS
1	Percentage of Population Covered by Broadband (%)	80.00	98%
2	Percentage of Households connected to Broadband	50%	64%
3	Cost of entry-level broadband services (SADC Definition) as a percentage of monthly Gross National Income (GNI) per capita;	2%	1%
4	Cost of entry-level terminals and household installation for fixed or mobile broadband	Less than USD50	$19.22
5	Percentage of Broadband/Internet user penetration	65%	148%
6	Percentage of youth and adults with at least a minimum level of proficiency in sustainable digital skills;	60%	86.8%
7	Percentage reduction in the un-connectedness of Micro- Small- Medium Sized Enterprise (MSMEs)	50%	N/A
8	Percentage of the population be using digital financial services	40%	85%
9	Percentage of gender Equality Across Target	50%	N/A
10	Number of SADC Member States with a funded National Broadband Plan or Strategy or include broadband in their Universal Access and Service (UAS) definition;	Yes	Yes

It can be noted that Botswana has surpassed most of the indicators reported on. However, as per Table 2 above, Botswana did not report on only two indicators largely because of lack of clarity on how the two were to be measured with consistency across the membership.

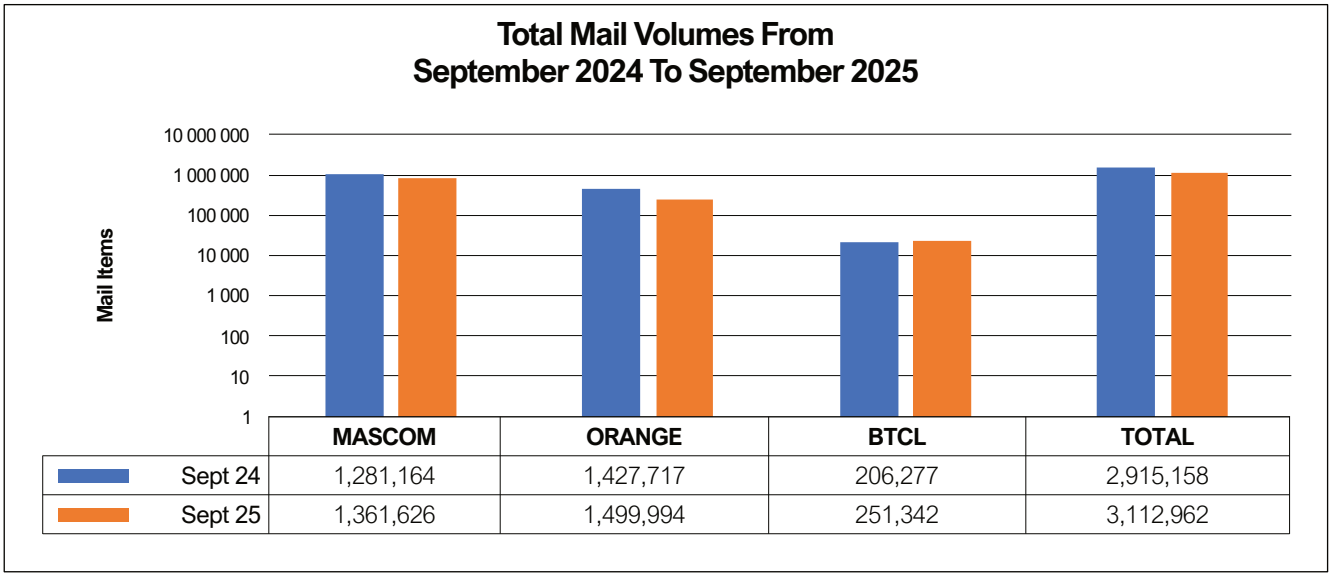
POSTAL SECTOR

TOTAL MAIL VOLUMES

Figure 36 below represents total mail volumes carried by both the Public Postal Operator (Botswana Post) and Commercial Postal Operators (courier companies). Total mail volumes carried decreased by 26% from 1,478,993 in September 2024 to 1,100,446 in September 2025. Ordinary mail recorded a decrease of 19% from 1,020,138 in September 2024 to 825,342 in September 2025. The decrease in Ordinary mail is due to electronic substitution as consumers prefer fast and more convenient methods of communicating.

Domestic Express Mail recorded a decrease of 42% from 437,574 to 251,803 between September 2024 and September 2025 respectively. In contrast International Express Mail increased by 9% from 21,281 to 23,301 between September 2024 and September 2025.

The increase in Express mail is in line with international trends as postal services facilitate trade as consumers can buy and sell goods locally and internationally.



	MASCOM	ORANGE	BTCL	TOTAL
Sept 24	1,281,164	1,427,717	206,277	2,915,158
Sept 25	1,361,626	1,499,994	251,342	3,112,962

Figure 36: Total Mail Volumes. (Source: BOCRA, 2025)

COMPETITION AMONG COMMERCIAL POSTAL OPERATORS

The market shares of commercial postal operators based on mail volumes for the period ending September 2025 are shown in the figure below. Sprint Couriers led the market with a share of 85%, followed by BotswanaPost with 6%. Ram Transport, FedEx and DHL placed third with each registering a 2% market share each, while Aramex and Pinnacle ranked fourth with 1% each. The group labelled "Others," which includes all courier companies with individual market shares of less than 1%, collectively accounted for 1% of the market.

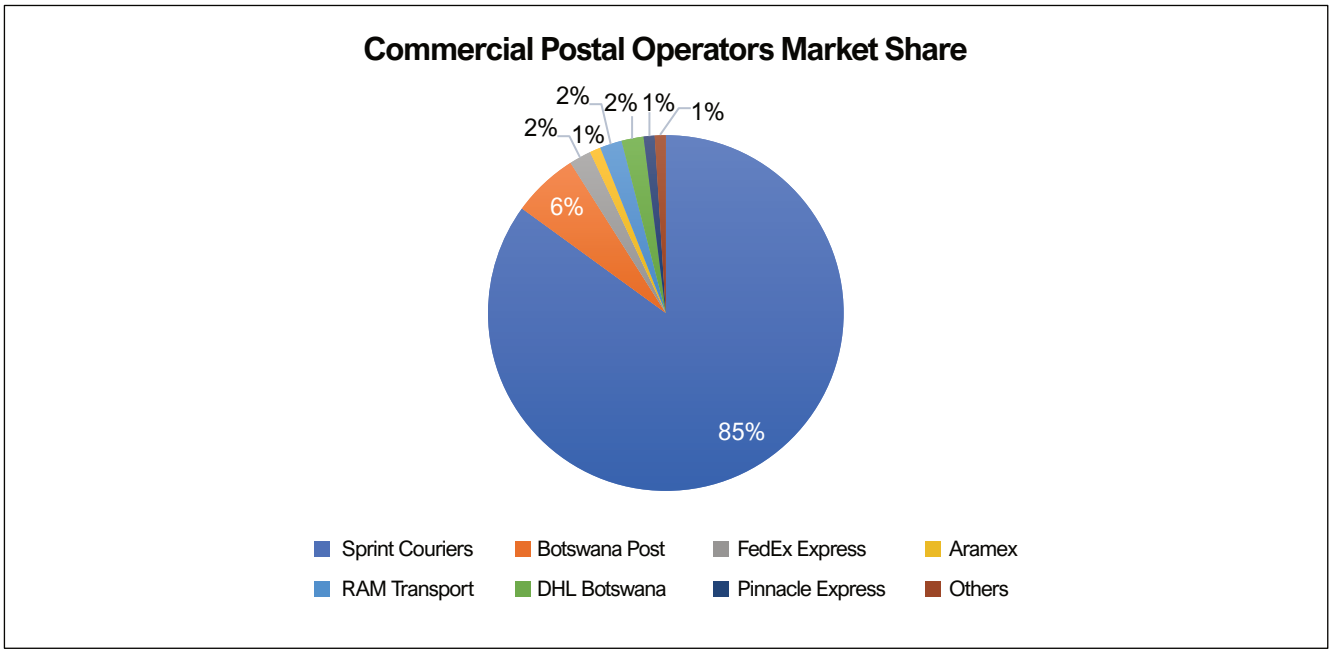


Figure 37: Commercial Postal Market Share

POSTAL INDICATORS

The postal sector continues to evolve in response to changing communication patterns and growing digital adoption. Between 2024 and 2025, there was a noticeable decline in traditional mail volumes, alongside a gradual shift toward parcel delivery and direct-to-door services, with home deliveries increasing from 4% to 12%. At the same time, postal tariffs rose across most service categories, reflecting ongoing cost pressures and efforts to sustain operations. Although the postal network expanded slightly, access in rural areas declined from 77% to 68%, and around 10% of the population remains outside the reach of delivery services, highlighting persistent gaps in universal access. On a positive note, full internet connectivity across post offices and continued uptake of innovative solutions position the sector well for further modernisation and a stronger role in supporting the digital economy.

Table 3: Postal Indicators. (Source: BOCRA,2025)

	2024	2025
Postal Infrastructure		
Total Number of Post Offices staffed by employees of the Designated Operator	133	139
Percentage of Postal Service Points located in Rural Areas	77	68
Total Number of Postal Facilities not open to the Public (Sorting centres excluding delivery offices)	3	3

	2024	2025
Access To Postal Services		
Total Number of Post Office Boxes (P.O. Boxes)	162,954	158,516
Percentage of mail delivered through P.O. Box or Postal Service Point Counter	96	88
Proportion of mail delivered directly to the home or business premises	4	12
Proportion of the population that is excluded from postal delivery	10	10
Presence of innovative solutions to extend access to mail delivery (e.g. automated parcel lockers, SMS notification-based delivery, e.t.c)	100	100
Postal Traffic/Volumes – Designated Operator		
Total Mail Volume Per Product Category - Letter Post - Domestic	3,514,254	2,691,864
Total Mail Volume Per Product Category - Letter Post – International Outband	2,188	2,099
Total Mail Volume Per Product Category - Letter Post – International Inbound	93,362	27,370
Total Mail Volume Per Product Category - EMS – Domestic	126,890	72,457
Total Mail Volume Per Product Category - EMS – International Outbound	509	327
Total Mail Volume Per Product Category - EMS – International Inbound	1,087	678
Total Mail Volume Per Product Category - Parcels – International Outbound	66	77
Total Mail Volume Per Product Category - Parcels – International Inbound	1,907	1,183
Postal Tariffs - Letters (20g)		
Basic tariff for a domestic letter (in US $)	0.57	0.83
Basic tariff for an international letter to the USA (in US $)	1.15	1.67
Basic tariff for an international letter to the UK (in US $)	1.07	1.59
Postal Tariffs - Parcels		
Basic tariff for a domestic parcel inter-city (in US $)	1.72	9.90
Basic tariff for an international parcel to the USA (in US $)	16.96	25.19
Basic tariff for an international parcel to the UK (in US $)	14.82	22.00
Postal Tariffs - EMS (500g)		
Basic tariff for a domestic EMS Inter-City (in US $)	5.23	9.90
Basic tariff for an international EMS to the USA (in US $)	25.84	25.19
Basic tariff for an international EMS to the UK (in US $)	20.83	30.88
Employment - Designated Operator		
Total Number of Full-Time Staff employed by the Designated Operator	1016	987
Total Number of Part-time Staff employed by the Designated Operator	53	53
Total Number of Staff employed by the Designated Operator	1 069	1 040
Total Number of Female staff Employed by the Designated Operator	621	611
Female staff as a percentage of total number of Staff	58	58
Female Management Staff as a percentage of the total number of Staff	6.4	6
Delivery Staff as a percentage of the total number of staff	13	23
Connectivity		
Percentage of Permanent Post Offices with Internet Connectivity	100	139
Percentage of Permanent Post Offices using counter automation systems	100	139

BROADCASTING SECTOR

FM BROADCASTING MARKET STRUCTURE

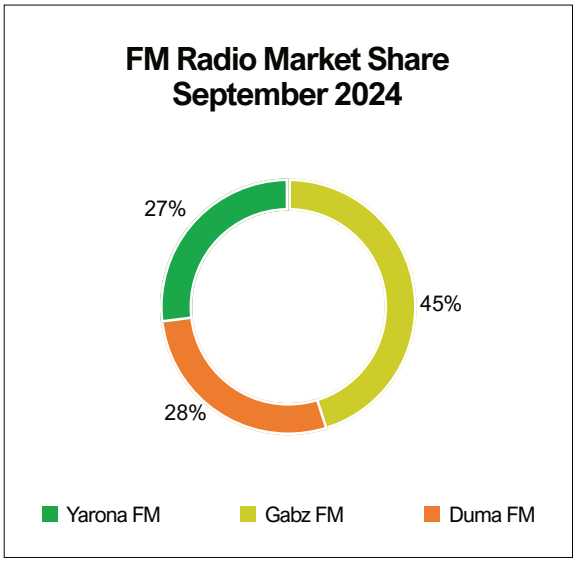
FM radio broadcasting market comprises three terrestrial FM radio stations namely Duma FM, GABZ FM, Yarona FM together with UB Radio, which has been licensed to operate campus radio in Gaborone, Francistown, and Maun. UB Radio officially went live on FM in November 2024. It is worth mentioning that there are two state broadcasters, Radio Botswana and RB2 playing in the radio broadcasting market although they do not require to be licensed by BOCRA in terms of the Communications Regulatory Authority Act, 2012. In addition, there is one operational Subscription Management Service (SMS) being Multichoice Botswana. Ytv which is a Content Service Provider (Satellite) and two IPTVs being UPIC tv and Now TV.

The Authority has authorised two operational online Radio Stations being The Cross FM & Rera Radio. During the period ending September 2025, the Authority issued seven (7) non-commercial broadcasting licences to The Mega Church International, Eternal Foundation, Men and Boys for Gender Equality, Okavango Human Wildlife Foundation, Ngwato Development Trust, The Apostolic Faith Mission, and The Seventh-day Adventist (SDA) Church.

This brings the total number of licensed radio broadcasting services (including commercial, campus, online, and non-commercial stations) to thirteen (13).

FM BROADCASTING MARKET SHARE

The diagrams below illustrate the market share of the three commercial radio broadcasters based on advertising revenue. As of September 2025, Duma FM held a market share of 35%, reflecting a 10-percentage-point decline from 45% recorded in September 2024. In contrast, Yarona FM increased its market share to 37% in September 2025, up from 27% in September 2024. Gabz FM's market share remained unchanged over the review period.



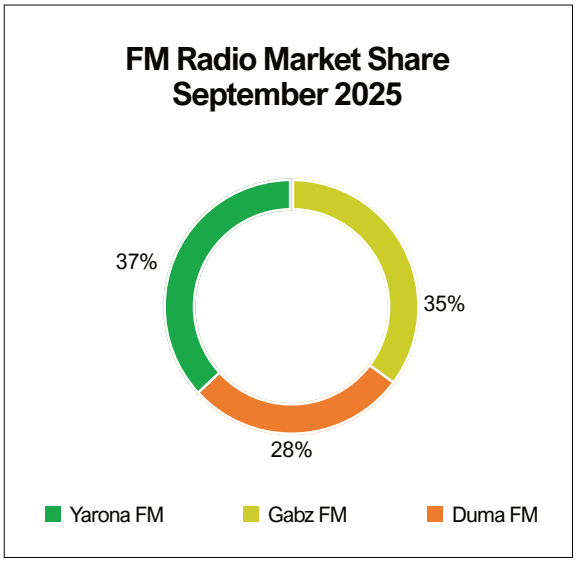
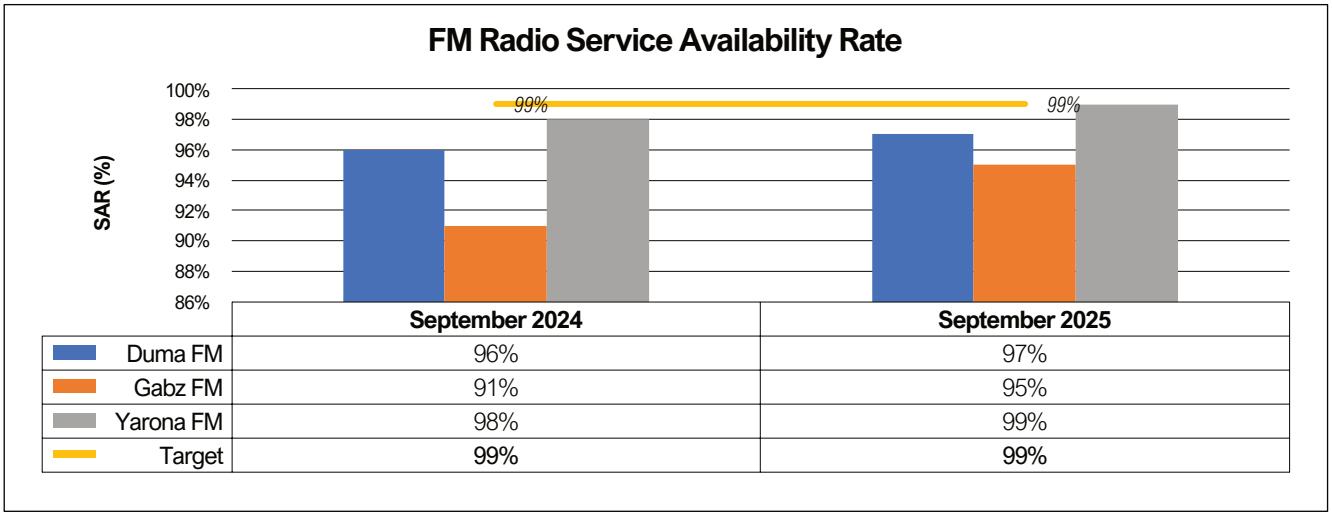


Figure 38: FM Radio Market Shares. (Source: BOCRA, 2025)

SERVICE AVAILABILITY RATE (SAR)

Service Availability Rate measures the quality of service based on availability of a broadcaster's services for access by consumers. It assesses the efforts that broadcasters take to maintain consistent service availability, ensuring that the services they broadcast are continuously on-air and reachable by listeners. FM radio stations are expected to maintain a minimum SAR of 99%. The diagrams below depict the performance for the three commercial FM radio stations.



	September 2024	September 2025
Duma FM	96%	97%
Gabz FM	91%	95%
Yarona FM	98%	99%
Target	99%	99%

Figure 39: Service Availability Rate For FM Radio. (Source: BOCRA, 2026)

Duma FM SAR as of September 2024 was 96%, Gabz FM was at 91% and Yarona FM was at 98%. By September 2025, Duma FM recorded a slight improvement to 97%, although the station noted that performance was affected by strong winds in Ghanzi which damaged antennas at its transmission site. Gabz FM SAR was at 95%, the station attributes under-performance to a faulty transmitter in Sojwe areas. Yarona FM reached the target at 99% for the period ending September 2025.

LOCAL CONTENT QUOTA

FM broadcasters are obligated to achieve a minimum of 45% local content quota. Local Content quota for radio broadcasting is calculated as the total volume of local music aired over the total volume of music played by a particular station over a period, multiplied by 100. In terms of the licence requirements, radio stations are obligated to achieve a minimum of 45% local content performance. The diagram below indicates that all the three radio stations achieved the threshold.

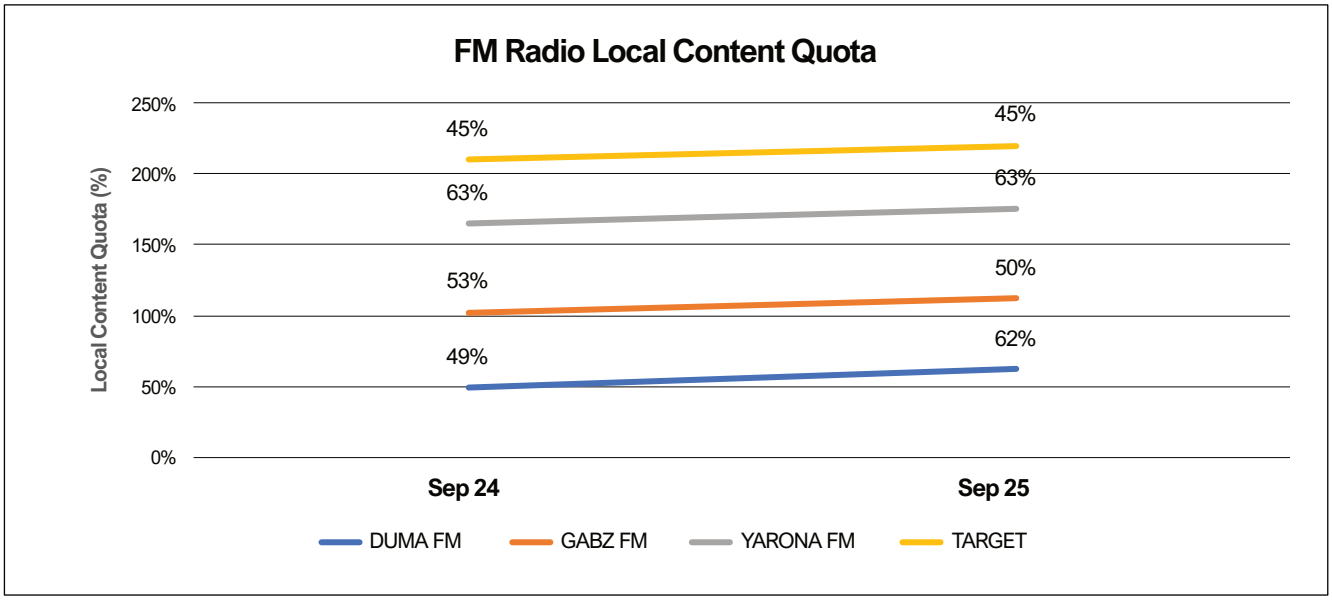


Figure 40: Local Content Quota for FM Radio. (Source: BOCRA,2025)

Duma FM achieved 49% in September 2024, Gabz FM played 53% in September 2024 and Yarona FM played 63% local content. In September 2025, Duma FM increased to 62% local content, the increase is attributable to a new strategy developed to improve local content. The strategy involves giving new upcoming artists an opportunity for their music to be played on the station every hour during each programme in the station. Gabz FM played 50% of local content and the station indicates that they have increased local music in the programming clock as a way to promote national identity, cultural preservation, and economic development in the creative sector, while Yarona FM played 63% of local content in September 2025. The station attributes this improvement to feedback from local businesses, who expressed a preference for the station to play more Botswana music. These advertisers indicated that they are more inclined to place their advertisements on a station that demonstrates strong relevance and support for local music and culture

ROLL OUT OBLIGATION

As part of their licence conditions, FM radio stations are obliged to provide services that cover a defined population during their licensing period. Licensees realised marginal increase over their “expected coverage” obligation following the installation of shared transmitters in Tutume, Sekakangwe and Tshesebe Villages.

Table 4: FM Radio Stations Roll Out Obligations. (Source: BOCRA, 2025)

FM Radio Stations	Sept 22	Sept 23	Sept 24	Sept 24	% Roll Out Obligation
Duma FM	81.26%	81.59%	84.07%	87.78%	92%
Gabz FM	78.25%	78.58%	81.06%	84.77%	91%
Yarona FM	72.39%	72.72%	75.20%	78.91%	92%

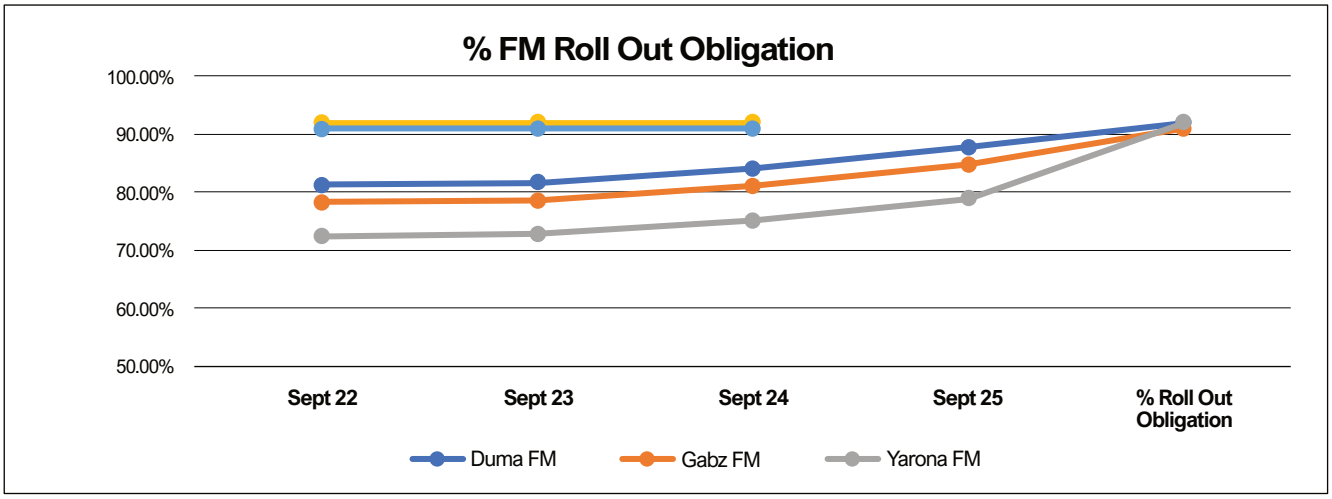


Figure 41: FM Radio Stations Roll Out Obligations. (Source: BOCRA, 2025)

Transmitter Locations of the three FM radio stations are as shown in the table below.

Table 5: Transmitter Locations for FM Radio Stations. (Source: BOCRA, 2025)

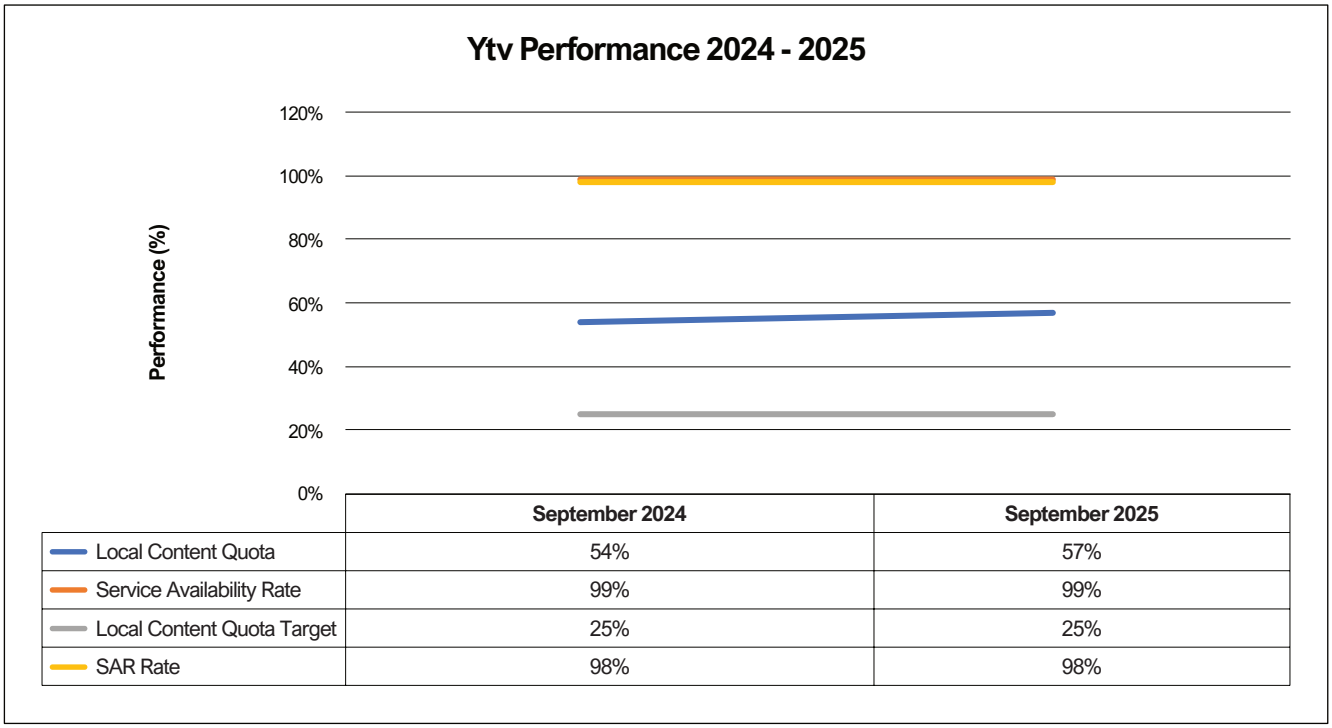
District	Duma FM	Gabz FM	Yarona FM
South East District	Gaborone	Gaborone	Gaborone
Southern District	Lobatse, Kanye, Malau, Senyamadi, Mabutsane, Jwaneng	Lobatse, Malau, Senyamadi, Mabutsane	Lobatse, Malau, Senyamadi, Mabutsane
Goodhope District	Ramatlabama, Phitshane Molopo, Mabule	Phitshane Molopo, Mabule	Phitshane Molopo, Mabule
Kweneng	Molepolole, Letlhakeng,Sojwe, Malwelwe, Salajwe, Takatokwane	Sojwe, Malwelwe, Salajwe, Takatokwane	Sojwe, Malwelwe, Salajwe, Takatokwane
Ghanzi District	Ghanzi	Ghanzi	
Hukuntsi District	Hukuntsi	Hukuntsi	Hukuntsi
Tsabong District		Tsabong	
Chobe District	Kasane	Kasane	
North East District	Francistown, Tshesebe, Sekakangwe, Senete	Francistown, Tshesebe, Sekakangwe, Senete	Francistown, Tshesebe, Sekakangwe, Senete
Bobirwa District	Bobonong, Sefhare		
Selibe-Phikwe	Selibe-Phikwe	Selibe-Phikwe	Selibe-Phikwe
Palapye District	Palapye, Serule	Palapye	Palapye
Mahalapye District	Mahalapye	Mahalapye	Mahalapye
North West District	Maun, Sehithwa, Sankoyo	Maun, Sehithwa, Sankoyo	Maun, Sehithwa, Sankoyo
Okavango District	Shakawe, Seronga	Shakawe, Seronga	Shakawe, Seronga
Gumare District	Gumare	Gumare	Gumare

COMMERCIAL TELEVISION BROADCASTING MARKET

The commercial television broadcasting market comprises nine television stations as follows;

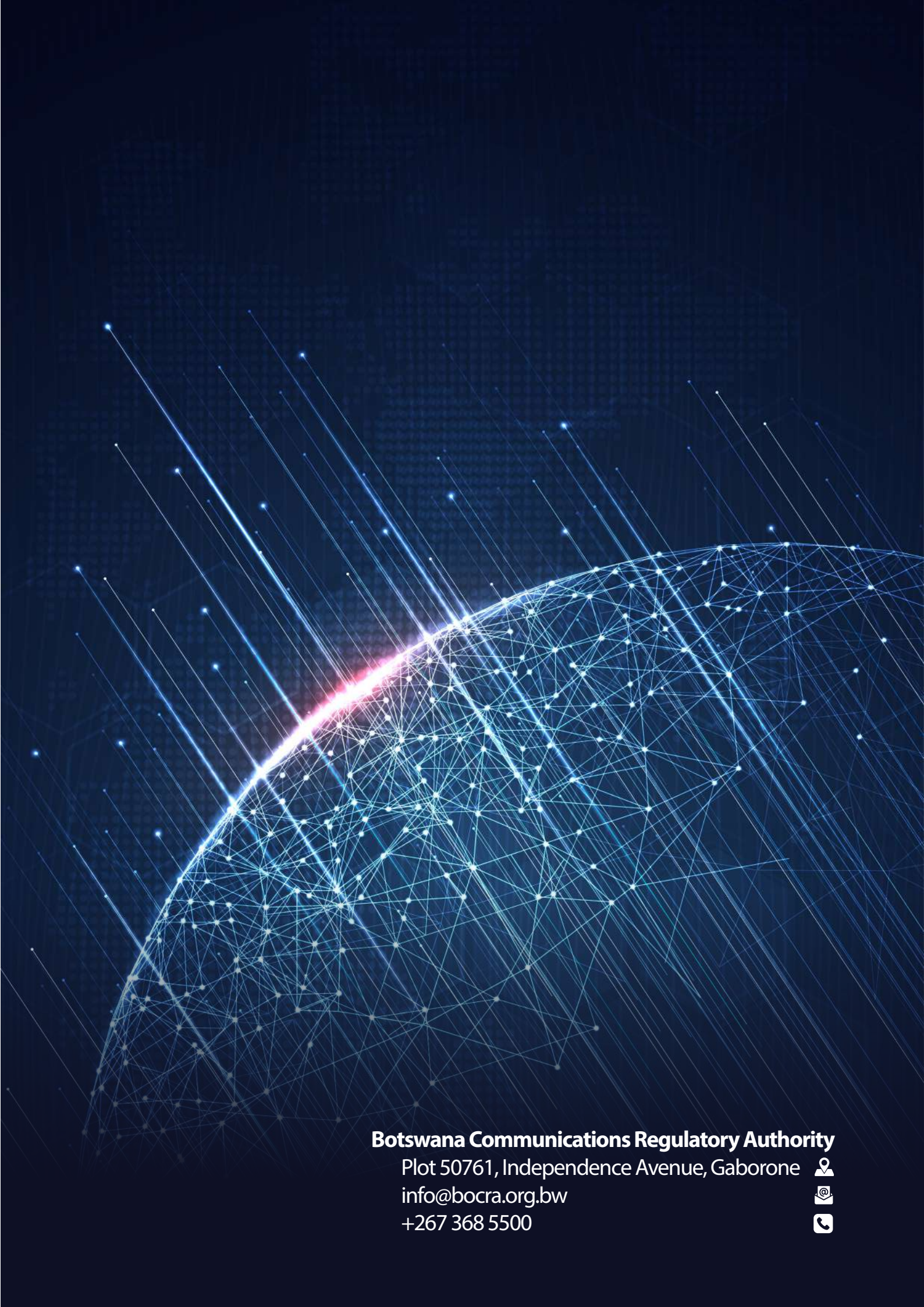
i. Free to air commercial television stations: Ytv, Khuduga TV;
ii. Satellite television stations: Star Times, On Air News, MultiChoice Botswana; and
iii. State broadcaster: Botswana Television (Btv)

Local content quota for television broadcasting measures the percentage of locally produced programmes over the overall programmes aired by a station over time. Television stations are obligated to attain a minimum local content quota of 20%. Ytv local content quota for September 2024 and September 2025 shows that the station achieved the targets by airing 57% local content in 2025, being an increase from 54% local content aired in the previous year. The station also reached SAR targets in both periods by performing at 99% in September 2024 and September 2025 respectively.



	September 2024	September 2025
Local Content Quota	54%	57%
Service Availability Rate	99%	99%
Local Content Quota Target	25%	25%
SAR Rate	98%	98%

Figure 42: Television performance. (Source: BOCRA, 2025)



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