Tanzania Communications Regulatory Authority

Communications Sector Performance Report

Quarter ending March 2026

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Executive Summary

The communications sector continues to record notable growth, emphasizing its role in advancing Tanzania's digital transformation and socio-economic development. The sector remains resilient and adaptive, supported by increasing investment and strong consumer uptake across telecommunications, internet, broadcasting, and postal and courier services.

During the quarter ending March 2026, telecommunications services recorded notable growth with total subscriptions rising by 4.6% from 106.9 million in December 2025 to 111.9 million. The Dar es Salaam region led the country's largest market, accounting for 20.6 million subscriptions. On the other hand, internet subscriptions grew by 1.5% from 58.1 million in the quarter ending December 2025 to 58.9 million and data traffic increased by 15.3% from 808 PetaBytes in the quarter ending December 2025 to 932 PetaBytes, Whilst, local voice and SMS traffic decreased by 3.80% and by 4.71%, respectively. Mobile broadband remains the most popular internet means contributing to 58% of the total internet subscriptions.

Number of smartphones increased by 4.6% from 28.5 millions in the quarter ending December 2025, to 29.8millions in the quarter ending March 2026. This growth was underpinned by continued infrastructure expansion, as the number of telecom towers grew from 10,029 in the quarter ending December 2025 to 10,084.

In the Broadcasting services, the number of decoders decreased by 1% from 2.11 million in the quarter ending December 2025 to 2.09 million, while the number of cable TV subscriptions increased by 3% from 17,280 in the quarter ending December 2025 to 17,803.

The postal and courier sector, serviced 170,352 corporate and individual domestic customers. During the period, 546,644 items were posted domestically and 32,565 internationally, while successfully delivering 907,759 items within the country and 44,555 international, underscoring its significant role in supporting both domestic and international communication and commerce.

The sector experienced various challenges including low smart phone penetration of 42.5% hindering uptake of broadband internet services, 23.7% gap of broadband geographical coverage and fraudulent attempts in some regions. On this note, sector priority includes expansion of broadband communication infrastructure, enhancing uptake of digital services, and safe and secure communication infrastructure.

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List of Abbreviations

Item	Description
2G	Second Generation Mobile Network
3G	Third Generation Mobile Network
4G	Fourth Generation Mobile Network
5G	Fifth Generation Mobile Network
BTS	Base Transceiver Station
dBm	Decibel-milliwatts
DSTV	Digital Satellite Television
DTH	Direct to Home
DTT	Digital Terrestrial Television
EA	East Africa
eNB	Evolved Node B
FM	Frequency Modulation
FTP	File Transfer Protocol
gNB	Next Generation Node B
HF	High Frequency
Kbps	Kilobits per second
M2M	Machine to Machine
Mbps	Megabits per second
MBs	MegaBytes
Ms	Milliseconds
P2P	Person to Person
QoS	Quality of Services
RoW	Rest of The World

Item	Description
SADC	Southern African Development Community
SMS	Short Message Service
TCRA	Tanzania Communications Regulatory Authority
TTCL	Tanzania Telecommunications Corporation
TV	Television
TTL	Time-to-Live
TZS	Tanzanian Shilling
UHF	Ultra High Frequency
VHF	Very High Frequency
VSAT	Very Small Aperture Terminal

Glossary

No	Items	Description
1	**Subscription**	A subscription where the SIM Card was used (at least once voice, SMS or data during the past 90 days) or subscription to pay TV services at least once in 90 days
2	**2G mobile cellular network**	The Second generation of mobile communications technology that provides voice, Short Message Service (SMS), and basic data.
3	**3G mobile cellular network**	The Third generation of mobile communications technology that allows voice, data and video communications.
4	**4G mobile cellular network**	The Fourth generation of mobile communications technology with high data rate and lower latency, and higher capacity than 3G.
5	**5G mobile cellular network**	The Fifth generation of mobile technology, which offers significantly faster speeds, ultra-low latency, and massive capacity to connect virtually everything.
6	**Mobile Broadband subscription**	Subscriptions to mobile broadband networks that provide a minimum speed of at least 2 Mbps.
7	**Courier services**	Specialized postal services for the speed collection, conveyance and delivery of postal items other than universal postal services.
8	**Digital Terrestrial Television (DTT)**	Is a system that broadcasts TV signals digitally over the air using landbased transmitters.
9	**Direct To Home (DTH)**	Is a satellite based television system that delivers digital television signals directly to individual homes via small satellite dishes.

No	Items	Description
10	**Fixed-broadband subscriptions**	Are connections to high speed internet at a specific location, using technologies like fibre, cable, Digital Subscriber Lines (DSL), satellite, or fixed wireless (like FWA).
11	**Geographical Coverage**	The extent and boundaries of the geographic area within which a particular service or network is available and can be accessed by users, regardless of whether the service is actually subscribed to or used.
12	**International bandwidth capacity**	The total equipped data transmission capacity of international Internet links connecting a country to the rest of the world, measured in bits per second (such as Mbps, Gbps, or Tbps), regardless of the level of traffic actually carried.
13	**Latency**	Time required for a packet to travel from a source to a destination and back.
14	**Machine-to-Machine (M2M) communication**	The direct automated exchange of data between devices or machines, without direct human intervention.
15	**Off-net**	Refers to a call or communication that originates in one mobile net-work and terminates in a different mobile network.
16	**On-net**	Refers to a call originating and terminating in the same mobile network.
17	**Person to Person (P2P)**	Two-way communication between individuals.
18	**Penetration Rate**	The percentage of a population that uses a particular service.
19	**Population coverage**	The percentage of people in a given area who have access to a specific service.

No	Items	Description
20	**Quality of Service (QoS)**	Overall performance of communication services measured against specific parameters.
21	**Roaming**	The ability of users to use their mobile phone (calls, SMS, data) outside their home network's coverage area.
22	**Roam to**	Refers to when a mobile user from your network goes outside your network coverage and connects to another operator's network in another area or country (outbound roaming).
23	**Roam from**	Refers to when a subscriber from another network (usually a foreign visitor) uses your network while in your coverage area (inbound roaming).
24	**SIM card**	Subscriber Identity module that is functioning on a mobile network system
25	**SMS**	A text messaging service.
26	**Fibre-to-the-Home (FTTH)**	Fibre goes directly to the subscriber's premises.
27	**Fibre-to-the-Office (FTTO)**	Fiber to the Office

Snapshot

Telecommunication Subscriptions

111.9 millions

4.6% increase

Telecommunication penetration rate

159.8%

Internet Subscriptions

58.9millions

1.5% increase

Internet Penetration Rate

84.2%

Internet Usage

932 PB

15.3% increase

Broadband Population Coverage

93.94% 3G

94.32% 4G

32.83% 5G

Smartphone

29.8 millions

4.6% increase

Smartphone Penetration Rate

42.5%

Local Voice Traffic Minutes

45.4 billions

3.80% decrease

Incoming International Voice Traffic Minutes

47.5 millions

6.0% decrease

Data Bundle Tariff

2.06 TZS

Industry average

Voice Bundle Tariff

6.30 TZS

Off Net

4.65 TZS

On Net

Telcommunication licenses

1,884

3.3% increase

Decoders Subscriptions

2.09 millions

1% decrease

Cable TV Subscriptions

17.8 thousands

3% increase

Broadcasting licenses

709

0.1% decrease

Domestic Posted Items

546,644

1.4% decrease

Domestic Delivered Items

907,759

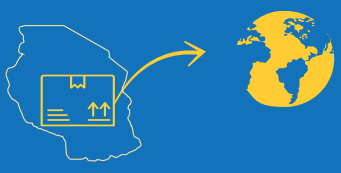
11.5% increase

International Delivered Items

44,555

3.9% decrease

Internationally Posted Items



32,565

8.3% increase

Postal licenses

144

3.4% decrease

Chapter 01

Telecommunications and Internet Services

Telecommunications and Internet Services

During the quarter under review, 111.9 million subscriptions were recorded, with 45.4 billion total voice minutes spent, 55.1 billion SMS sent and received and 932 Petabytes of data consumed. This has been facilitated by an increase in network coverage, and an increase in smartphone penetration

1.1. Telecom Subscriptions

As of December 2025 **As of March 2026**

106.9 Million | 111.9 Million | **4.6%** ↑

The total number of subscriptions increased by 4.6% from 106.9 million during the quarter ending December 2025 to 111.9 million subscriptions as of March 2026. This shows continued demand for telecommunication services. Out of the 111.9 million subscriptions, Mobile subscriptions contributed 99% and Fixed subscriptions 0.1% of the total subscriptions. The total number of mobile and fixed subscriptions for the quarter ending March 2026 is shown in Table 1.1.1.

Table 1.1.1: Mobile (P2P & M2M) and Fixed Subscriptions

Month	Mobile subscriptions	Fixed subscriptions	Total
January	108,811,040	111,624	108,922,664
February	109,799,887	111,793	109,911,680
March	111,795,302	111,933	111,907,235

1.1.1. Mobile Subscriptions Categories (P2P and M2M)

SIM card subscriptions are categorized by Person to Person (P2P) and Machine to Machine (M2M). P2P subscriptions recorded a 4.7% increase during the quarter ending March 2026 as shown in Figure 1.1.1.1. Whereas the distribution per operator is as shown in Table 1.1.1.1 and Table 1.1.1.2 shows SIM cards subscribed for M2M communications per operator for the quarter ending March 2026.

Figure 1.1.1.1: P2P & M2M subscriptions

P2P subscriptions growth indicates an increase in accessibility of telecommunication services.

4.7% ↑

The increase in M2M signals gradual progress in the deployment of IoT and digital automation services

4.4% ↑

Table 1.1.1.1: Number of P2P Subscriptions per Operator

Month	Airtel	Halotel	TTCL	Vodacom	Yas	Total
January	23,421,212	17,714,324	1,752,205	33,728,178	31,164,195	107,780,114
February	23,388,041	17,855,496	1,774,538	34,570,964	31,161,620	108,750,659
March	23,405,300	18,222,244	1,797,670	35,538,870	31,760,354	110,724,438

Table 1.1.1.2: Number of M2M Subscriptions per Operator

Month	Airtel	Halotel	TTCL	Vodacom	Yas	Total
January	339,354	88,020	3,461	628,330	83,385	1,142,550
February	344,353	90,520	3,467	637,262	85,419	1,161,021
March	346,794	93,520	4,023	648,069	90,391	1,182,797

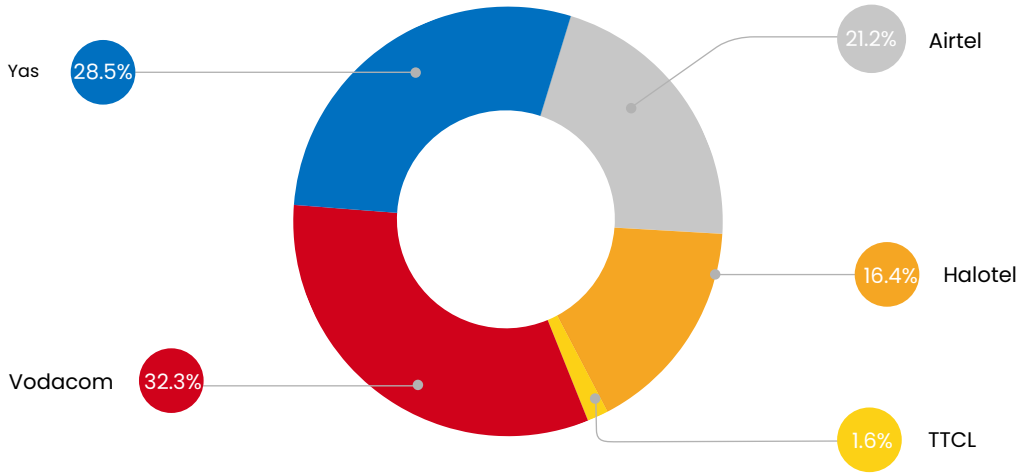
1.1.2. Subscriptions per Operator

The subscriptions per operator for the quarter ending March 2026 is presented in the Table 1.1.2.1 whereas market share per operator is shown in Figure 1.1.2.1.

Table 1.1.2.1: Subscriptions per Operator

Month	Airtel	Halotel	TTCL	Vodacom	Yas	Total
January	23,760,566	17,802,344	1,755,666	34,356,508	31,247,580	108,922,664
February	23,732,394	17,946,016	1,778,005	35,208,226	31,247,039	109,911,680
March	23,752,094	18,315,764	1,801,693	36,186,939	31,850,745	111,907,235

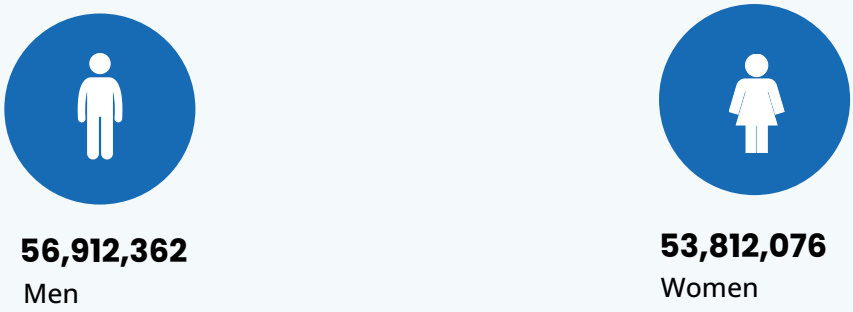
Figure 1.1.2.1: Market Share per Operator



The telecom market continues to exhibit strong competition which is necessary in promoting affordability.

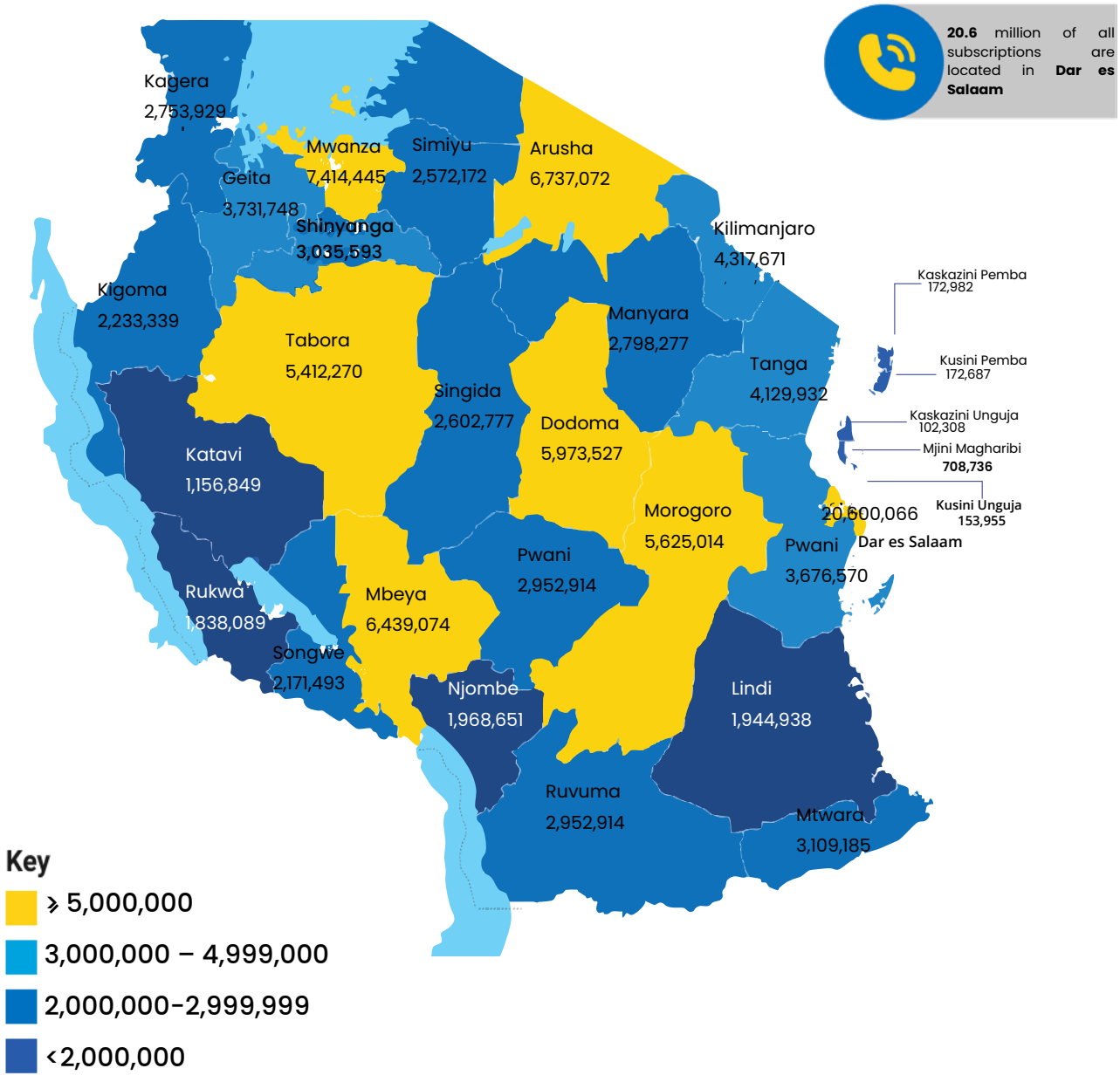
1.1.3 subscriptions by Gender and Region

Figure 1.1.3.1: Telecom Services (P2P) Subscriptions by Gender



Women, who are many compared to men in terms of population size, slightly lag behind in utilization of telecommunication services .On the other hand, Dar es Salaam ranked first by having 20.60 million of all subscriptions, Mwanza ranked second with 7.41 million subscriptions, Arusha ranked third with 6.74 million subscriptions, Mbeya ranked fourth with 6.44 million subscriptions, and Dodoma ranked fifth by having 5.97 million of all subscriptions. The distribution of telecom subscriptions per region is depicted in figure 1.1.3.2.

Figure 1.1.3.2: Telecom services subscriptions by region



1.1.4 Trend of Subscriptions and Penetration

The quarterly trends of subscriptions contributed to an increase in penetration throughout the quarters. Penetration had an average growth of 5.3% throughout the quarters and subscriptions had an average growth of 6.5% to under the same period of review.

Figure 1.1.4.1: Quarterly Telecommunication Penetration Trend

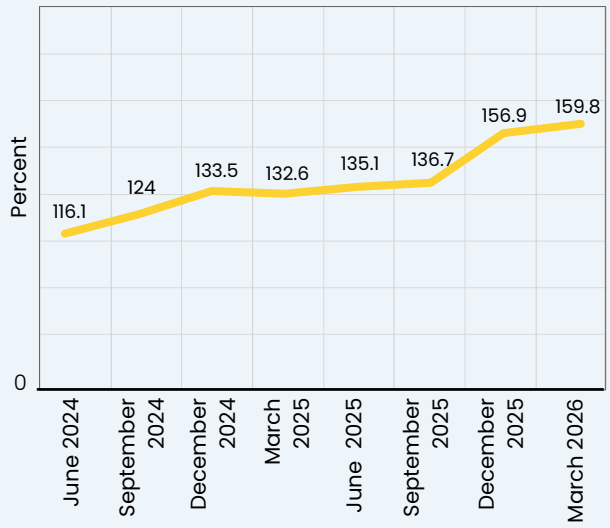
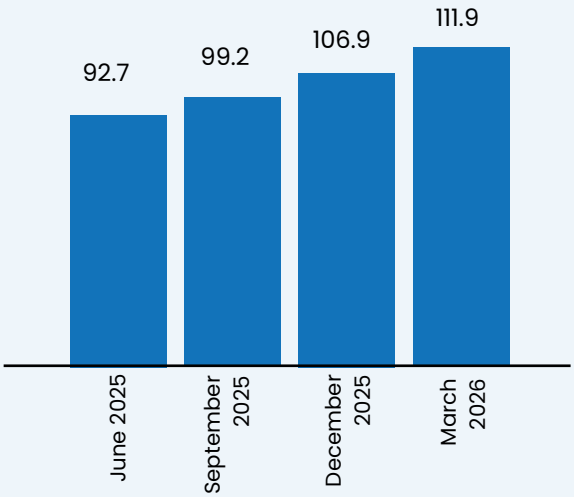


Figure 1.1.4.2: Quarterly Subscription trend (in millions)



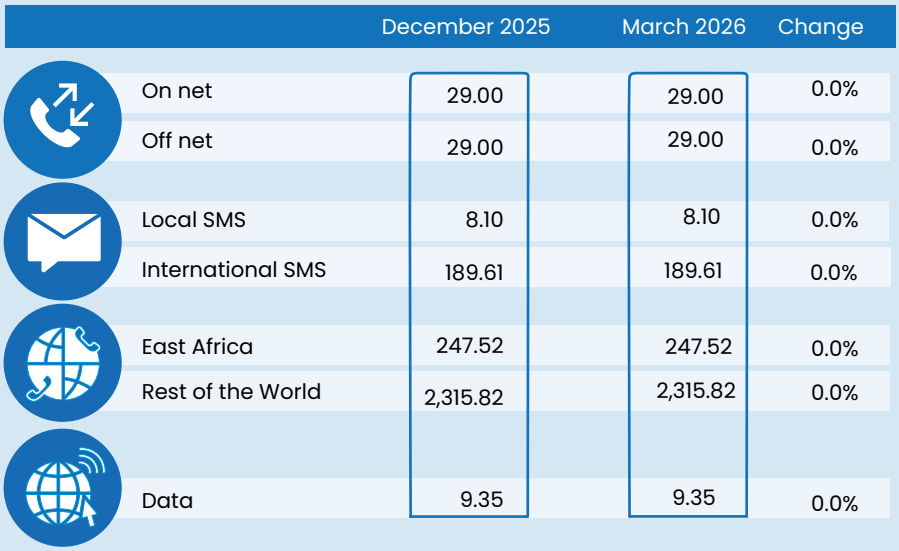
1.2 Telecommunication Tariffs

Tariffs for telecommunication services are comprised of basic (Pay as You Go) and bundle tariffs, charged for voice per minute, SMS and data services per MB, for local, East Africa (EA) and Rest of the World (RoW).

1.2.1 Basic Tariff (Pay as You Go)

Basic tariffs for data, voice calls and SMS services for local, EA and RoW, remained unchanged from the previous quarter as shown in Figure 1.2.1.1.

Figure 1.2.1.1: Basic tariff (Pay as You Go) change



1.2.1.1 Voice Tariffs (in TZS)

These are one minute voice charges when a consumer makes a local or international call without subscribing to a bundle service. Voice tariffs for the quarter ending March 2026 for local and international services per operator are shown in Table 1.2.1.1.1.

Table 1.2.1.1.1: Local, EA and RoW voice tariffs (in TZS) per operator

Operator	On-net	Off-net	EA	RoW
Airtel	30.00	30.00	260.00	2,350.00
Halotel	25.00	25.00	250.00	1,424.44
Yas	30.00	30.00	260.00	2,550.00
TTCL	30.00	30.00	217.60	2,871.33
Vodacom	30.00	30.00	250.00	2,383.33
Industry Average	**29.00**	**29.00**	**247.52**	**2,315.82**

Table 1.2.1.1.1 shows no difference in charges when calling within and outside the network. While other operators charged TZS 30 per minute for both on-net and off-net, Halotel charged TZS 25. In addition to that, EA and RoW voice tariffs varied across networks. The industry average for local, EA and RoW voice tariffs in the quarter ending March 2026 remained unchanged from previous quarter.

1.2.1.2 SMS and Data Tariffs (in TZS)

The Pay as You Go tariffs for local and international SMS, and data remained the same as in the previous quarter. The industry average tariffs for local SMS, international SMS and data for March 2026 is as shown in Table 1.2.1.2.1.

Table 1.2.1.2.1: SMS and Data Tariffs (in TZS)

Operator	Local SMS	International SMS	Data (in TZS per MB)
Airtel	8.00	215.00	9.35
Halotel	6.50	95.00	9.35
Yas	8.00	215.00	9.35
TTCL	10.00	138.06	9.35
Vodacom	8.00	285.00	9.35
Industry Average	8.10	189.61	9.35

1.2.2 Disaggregated Bundle Tariffs (in TZS)

The disaggregated bundle tariffs for voice per minute, SMS and data (MB) changed at different rates in the quarter ending March 2026 compared to the quarter ending December 2025 as shown in Table 1.2.2.1.

Table 1.2.2.1: Disaggregated Bundle Tariffs (in TZS)

Period	On-net	Off-net	SMS	Data
March 2026	4.65	6.30	1.45	2.06
December 2025	5.11	6.33	1.44	2.06
Change	-9.0%	-0.5%	0.7%	0.0%

Table 1.2.2.2: Average Tariffs for the Quarter ending March 2026 per Operator

Period	On-Net	Off-Net	SMS	Data
Airtel	2.05	7.60	1.18	2.05
Halotel	4.51	5.07	1.54	2.05
Yas	5.36	6.11	1.22	2.04
TTCL	6.80	6.80	2.07	2.08
Vodacom	4.55	5.92	1.22	2.10
Industry Average	4.65	6.30	1.45	2.06

Table 1.2.2.2 shows that tariffs charged during the quarter varied across MNO's.

1.2.3 Industry Average Tariffs (in TZS)

The industry average basic and bundle tariffs for telecommunications services for the period under review show that average bundle tariffs are lower compared to basic tariffs, as shown in Table 1.2.3.1. Affordability of bundle tariffs for telecommunication services attracts the majority of users (99.9%) to subscribe to bundle services.

Table 1.2.3.1: Industry Average for Basic and Bundle Tariffs (in TZS)

	On-Net	Off-Net	SMS	Data
Average basic tariff	29.00	29.00	8.10	9.35
Average bundle tariff	4.65	6.30	1.45	2.06

1.2.3.1 Trend of Industry Average Basic Tariffs (in TZS)

The quarterly trend of industry average basic and bundle tariffs for voice calls, SMS and data are shown in Figure 1.2.3.1.1, 1.2.3.1.2, 1.2.3.1.3, and 1.2.3.1.4. Basic voice, SMS and data tariffs have remained constant for three quarters consecutively.

Figure 1.2.3.1.1: Quarterly Industry Average Basic Voice Tariff Trend

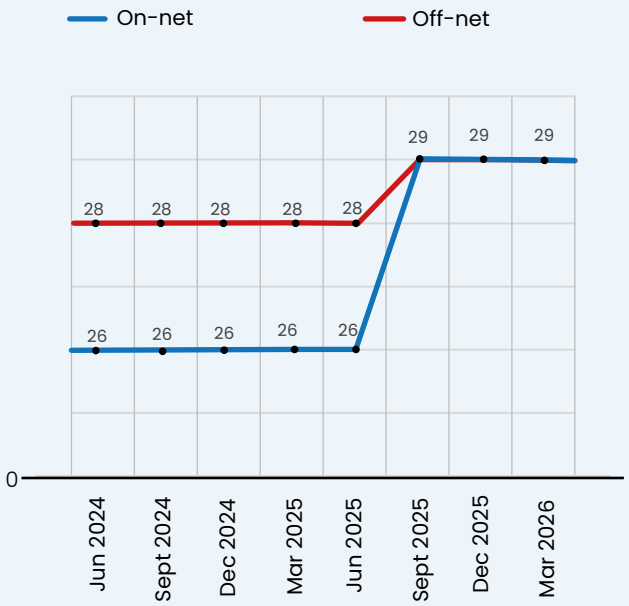


Figure 1.2.3.1.2: Quarterly Industry Average Basic International Voice Tariff Trend

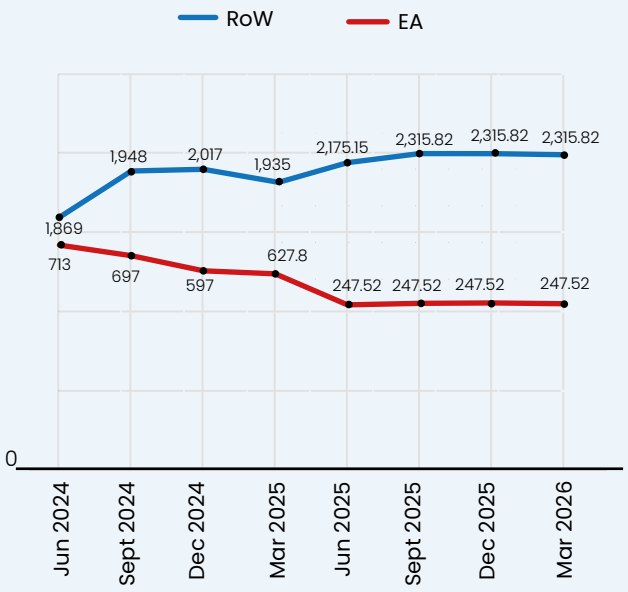


Figure 1.2.3.1.3: Quarterly Industry Average Basic SMS Tariff Trend (TZS)

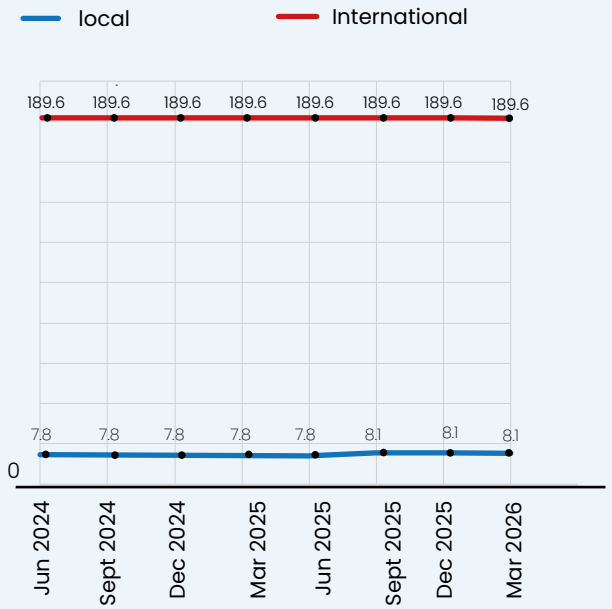
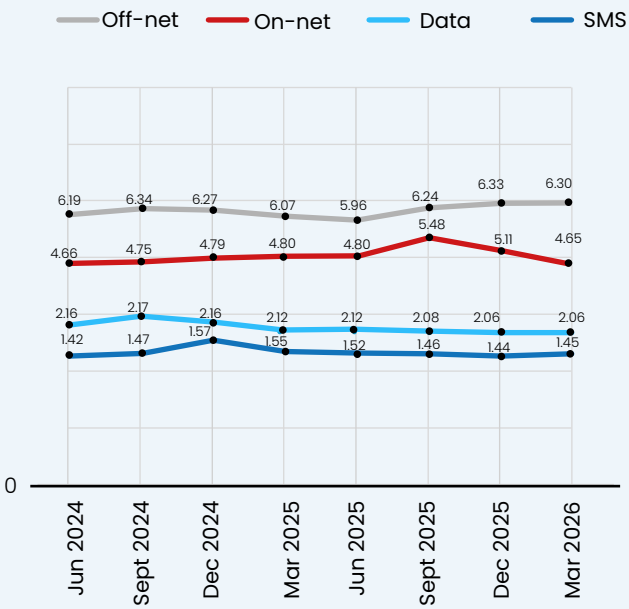


Figure 1.2.3.1.4: Quarterly Industry Average Bundled Tariff Trend



1.3. Telecommunication Traffic

During the period under review, statistics indicate a growth on usage of telecommunication services, Whereas, for voice services, 45.4 Billion minutes were generated for local calls and 207.3 Million minutes were generated for international calls. On the other hand, 55.1 Billion SMS were sent and received locally and 3.1 Million SMS were sent and received internationally.

1.3.1 Voice traffic

1.3.1.1 Local Voice traffic (in minutes)

Quarter ending December 2025	Quarter ending March 2026	
47.2 Billion	45.4 Billion	3.8% ↓

The local on-net and off-net voice traffic decreased by 3.8% during the period under review as shown in the summary above. Further analysis shows that, on-net and off-net traffic minutes decreased by 7.10% and 0.10% respectively as shown in figure 1.3.1.1. Furthermore, Table 1.3.1.1 shows that the month of January 2026 had the highest traffic compared to February and March.

Figure 1.3.1.1: Local Voice Traffic in Minutes

	Quarter ending December 2025	Quarter ending March 2026	Change (%)
On Net	24.70 Billion	22.95 Billion	7.10% ▼
Off Net	22.51 Billion	22.49 Billion	0.10% ▼

Table 1.3.1.1: On-net and Off-net voice traffic (in minutes)

	January	February	March
On-net	8,004,814,102	7,107,671,501	7,837,852,021
Off-net	7,905,974,576	6,955,913,140	7,628,733,376
Total	15,910,788,678	14,063,584,641	15,466,585,397

The traffic minutes share per operator for on-net and off-net traffic calls shown in figure 1.3.1.2 and figure 1.3.1.3. Airtel had the highest share for on-net (34.3%) and off-net (29.7%) traffic. In addition, figure 1.3.1.4, depict quarterly trend of local voice traffic.

Figure 1.3.1.2: On-Net Local Voice Traffic Market Share

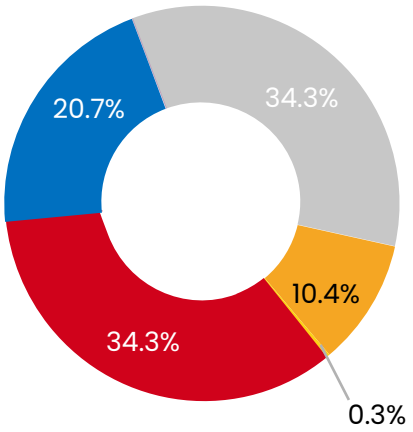


Figure 1.3.1.3: Off-Net Local Voice Traffic Market Share

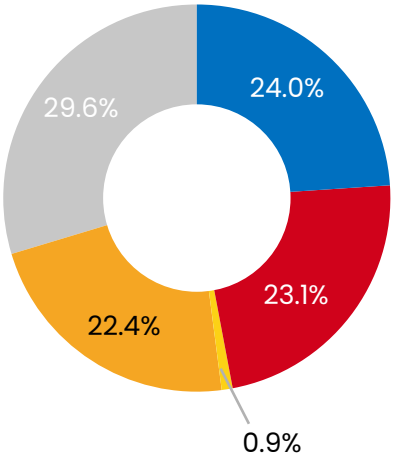
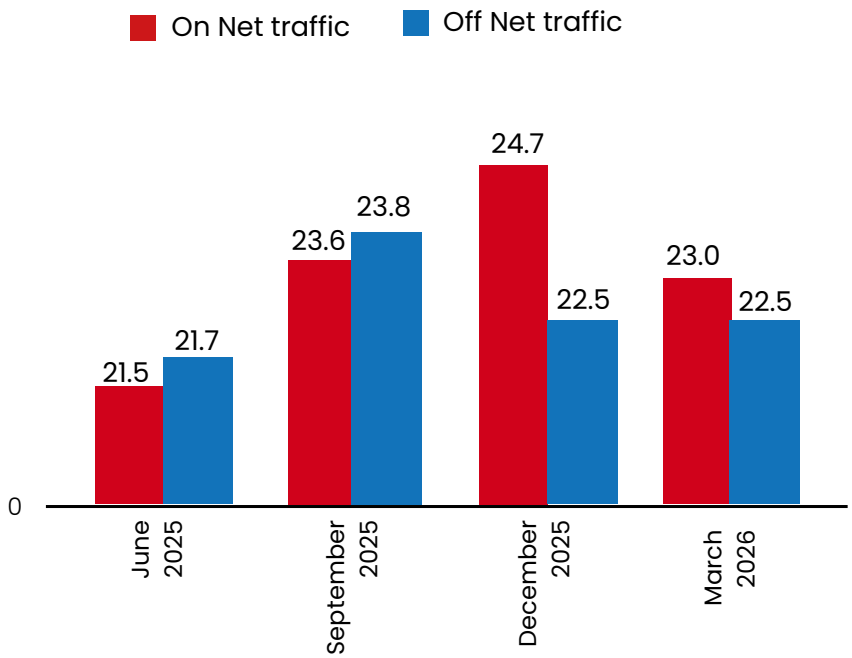
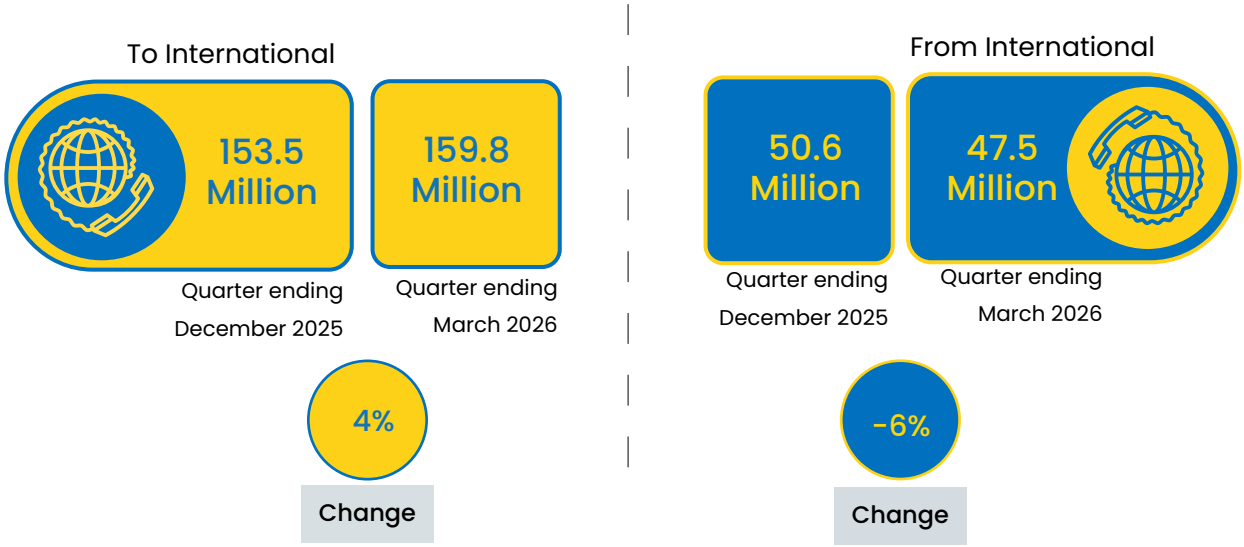


Figure 1.3.1.4: Quarterly Local Voice Traffic Trend (in millions)



1.3.1.2 International Voice Traffic



The summary shows an increase in traffic minutes to international by 4% and a decrease from international by 6% during the period under review. Voice traffic to international accounted for 77% of total international traffic, while inbound voice traffic originating from international contributed the remaining 23%.

Total voice traffic to and from EA, SADC and RoW for the quarter ending March 2026 is shown in Table 1.3.1.2.1. Share of voice traffic in minutes to and from EA, SADC and RoW are shown in figure 1.3.1.2.1, 1.3.1.2.2 and 1.3.1.2.3. respectively. In addition, more international voice traffic is generated within EA as compared to SADC and RoW.

Table 1.3.1.2.1: Total Traffic (in minutes) to/from EA, SADC and RoW

Month	January	February	March	Total
To East Africa	52,944,689	49,530,044	54,903,517	157,378,250
From East Africa	14,696,155	13,450,500	14,420,228	42,566,883
To SADC	102,026	88,166	89,161	279,353
From SADC	180,435	178,085	175,416	533,936
To the Rest of the World	763,681	690,467	703,639	2,157,787
From the Rest of the World	1,475,722	1,347,393	1,537,881	4,360,996

Figure 1.3.1.2.1 Voice Traffic to and from EA

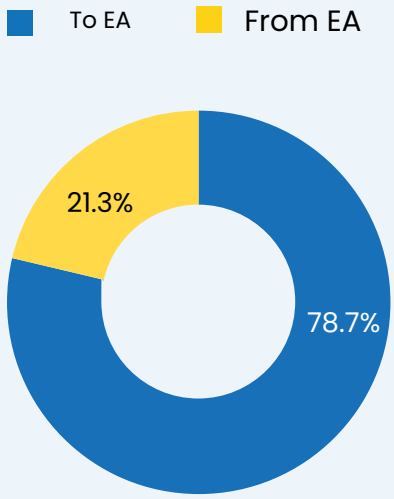


Figure 1.3.1.2.2: Voice Traffic to and from SADC

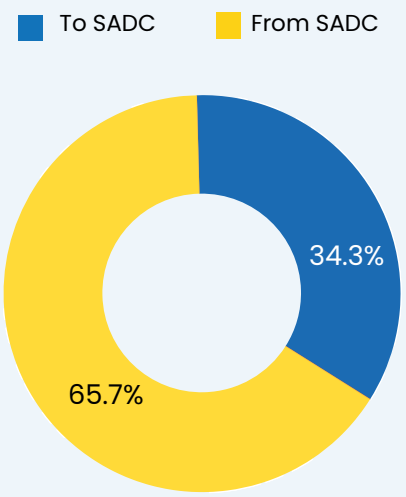
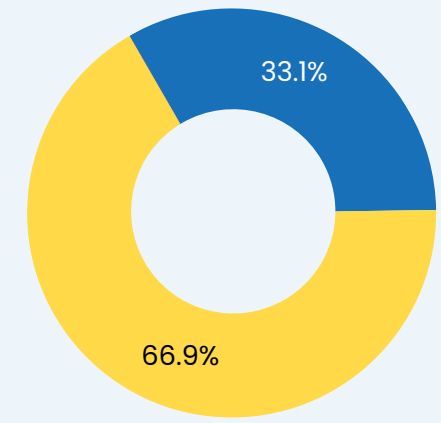


Figure 1.3.1.2.3 Voice Traffic to and from RoW



1.3.2 SMS Traffic

1.3.2.1 Local SMS Traffic

The summary shows a decrease in SMS traffic by 4.7% for the quarter ending March 2026.

As December 2025	As of March 2026	
57.8 Billion	55.1 Billion	4.7% ↓

Table 1.3.2.1.1: On net and Off Net SMS Traffic

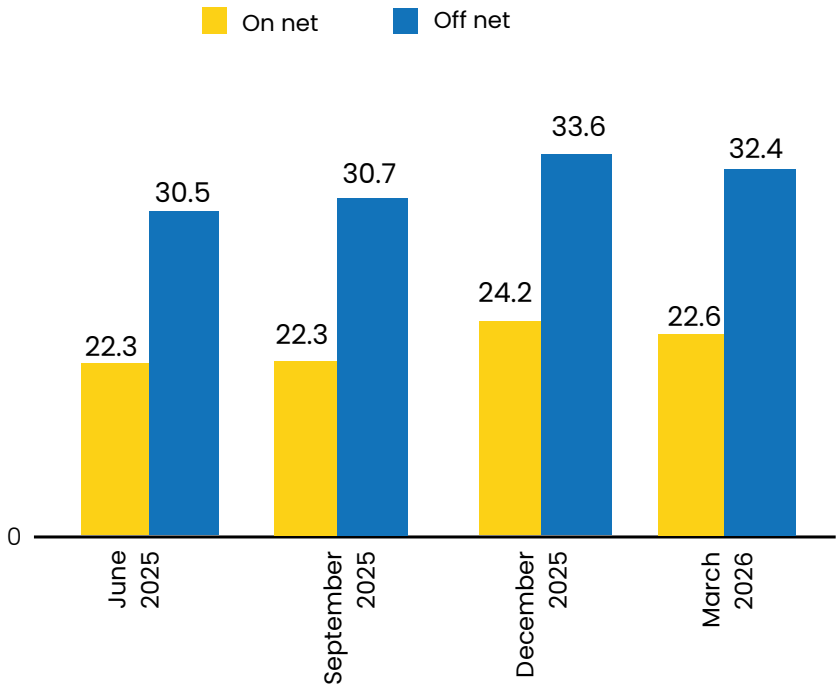
Period	On net SMS	Off net SMS	Total
March 2026	22.61 Billion	32.47 Billion	55.08 Billion
December 2025	24.20 Billion	33.61 Billion	57.80 Billion
Change	-6.54%	-3.39%	-4.71%

The local on-net and off-net SMS traffic decreased by 6.54% and 3.39% respectively during the period under review as shown in Table 1.3.2.1.1. Further, Table 1.3.2.1.2 shows that the month of January experienced the highest traffic compared to February and March 2026. In addition, figure 1.3.2.1.1, depict quarterly trend of local SMS traffic.

Table 1.3.2.1.2: On Net and Off Net SMS Traffic in Quarter ending March 2026

	January	February	March	Total
On-Net SMS	8,137,633,126	6,868,724,329	7,606,701,869	22,613,059,324
Off-Net SMS	11,695,855,033	9,771,932,712	11,002,616,884	32,470,404,629
Total	19,833,488,159	16,640,657,041	18,609,318,753	55,083,463,953

Figure 1.3.2.1.1: Quarterly Trend of Local SMS Traffic (In Billions)



1.3.2.2 International SMS Traffic

Total international SMS traffic to and from EA, SADC and RoW for the quarter ending March 2026 is shown in Table 1.3.2.2.1. Moreover, the share of SMS traffic to and from EA, SADC and RoW is shown in figure 1.3.2.2.1, 1.3.2.2.2 and 1.3.2.2.3, respectively. Generally, more international SMS traffic was generated from RoW as compared to EA and SADC.

Figure 1.3.2.2.1: SMS Traffic To and From EA

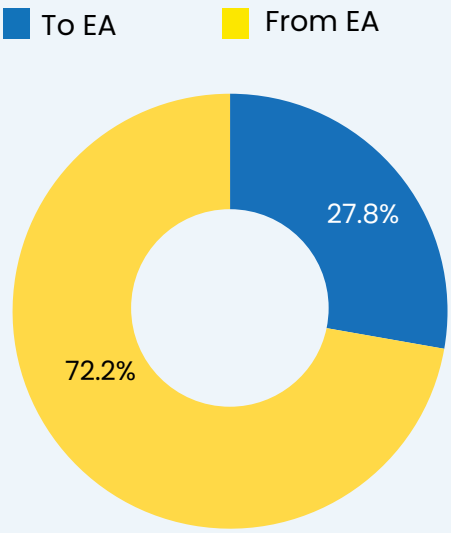


Figure 1.3.2.2.2: SMS Traffic to and From SADC

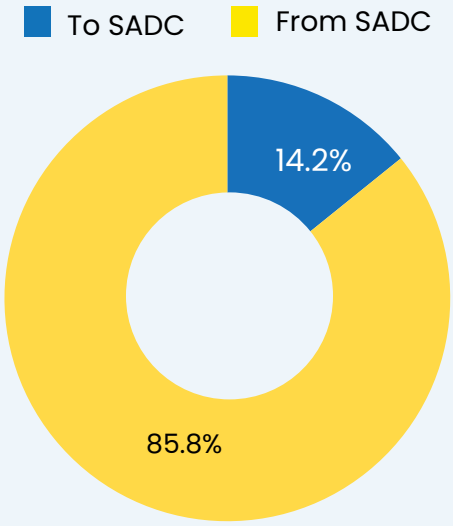


Figure 1.3.2.2.3: SMS traffic To and From RoW

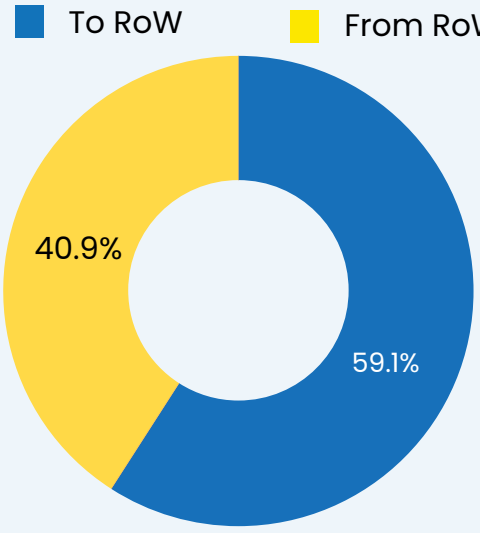


Table 1.3.2.2.1: SMS traffic to/from EA, SADC and RoW

	January	February	March	Total
To East Africa	66,321	51,532	57,273	175,126
From East Africa	169,960	135,890	149,752	455,602
To SADC	21,095	17,400	18,126	56,621
From SADC	119,866	110,284	112,001	342,151
To the Rest of the World	452,037	361,045	405,079	1,218,161
From the Rest of the World	430,236	272,830	140,348	843,414

1.4 Roaming Traffic

During the period under review, roaming to traffic for voice and SMS services was higher compared to roaming from traffic for voice and SMS services. However, during the same period, roaming to traffic for data services was lower compared to roaming from traffic as shown in figure 1.4.1. Further, statistics show that there is a wide gap between roaming to and roaming from for data services.

Figure 1.4.1: Roaming Traffic

	Voice	SMS	Data
Roaming to	6.6 Billion	6.0 Million	6,263.6 PB
Roaming from	1.2 Billion	0.9 Million	207,600 PB

1.4.1 Voice roaming Traffic (in minutes)

The voice roaming traffic to and from EA, SADC and RoW for the quarter ending March 2026 is shown in table 1.4.1.1.

Table 1.4.1.1: Voice Roaming Traffic (in minutes)

	EA	SADC	RoW	Total
Roaming to	13,328,977	40,319	6,610,990,931	**6,624,360,227**
Roaming from	892,935,699	4,301,715	284,399,088	**1,181,636,502**

1.4.2 SMS Roaming Traffic

The SMS roaming traffic to and from EA, SADC and RoW for the quarter ending March 2026 is shown in table 1.4.2.1.

Table 1.4.2.1: SMS Roaming Traffic

	EA	SADC	RoW	Total
Roaming to	3,067,286	504,455	2,429,198	6,000,939
Roaming from	259,530	71,883	597,599	929,012

1.4.3 Data Roaming Traffic (in MB)

The Data roaming traffic in MB to and from EA, SADC and RoW for the quarter ending March 2026 is shown in table 1.4.3.1.

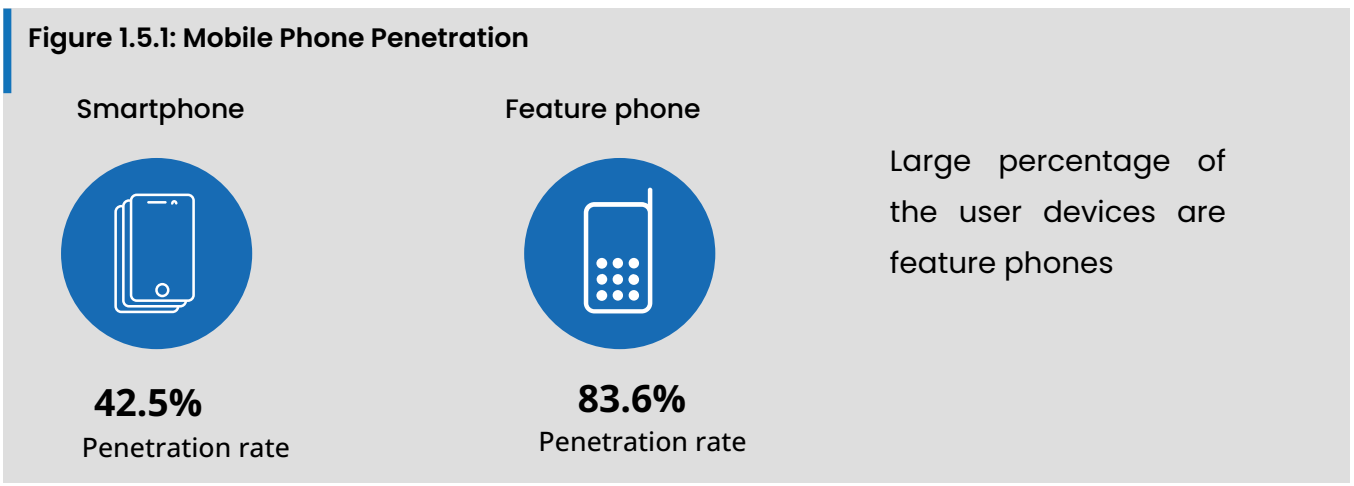
Table 1.4.3.1: Data Roaming Traffic (in MB)

	EA	SADC	RoW	Total
Roaming to	3,212,006	1,193,959	6,263,616,346,868	6,263,620,752,833
Roaming from	4,450,629,908,713	4,876,786,821,712	198,272,490,254,587	207,599,906,985,012

1.5 User Devices

Smartphone penetration increased from 41.82% in the quarter ending December 2025 to 42.50% in the quarter ending March 2026. Feature phone penetration decreased from 87.11% in the quarter ending December 2025 to 83.6% in the quarter ending March 2026 as shown in Figure 1.5.1.

Figure 1.5.1: Mobile Phone Penetration



Despite the growth in the number of smartphones, penetration is still relatively low in comparison to the broad network coverage, which represents an opportunity for strategic investment in affordable devices to aid in bridging the digital divide. The penetration rate for other device categories such as Handheld, Modem, and Tablets collectively account for less than 6% of total devices, as shown in Table 1.5.1.

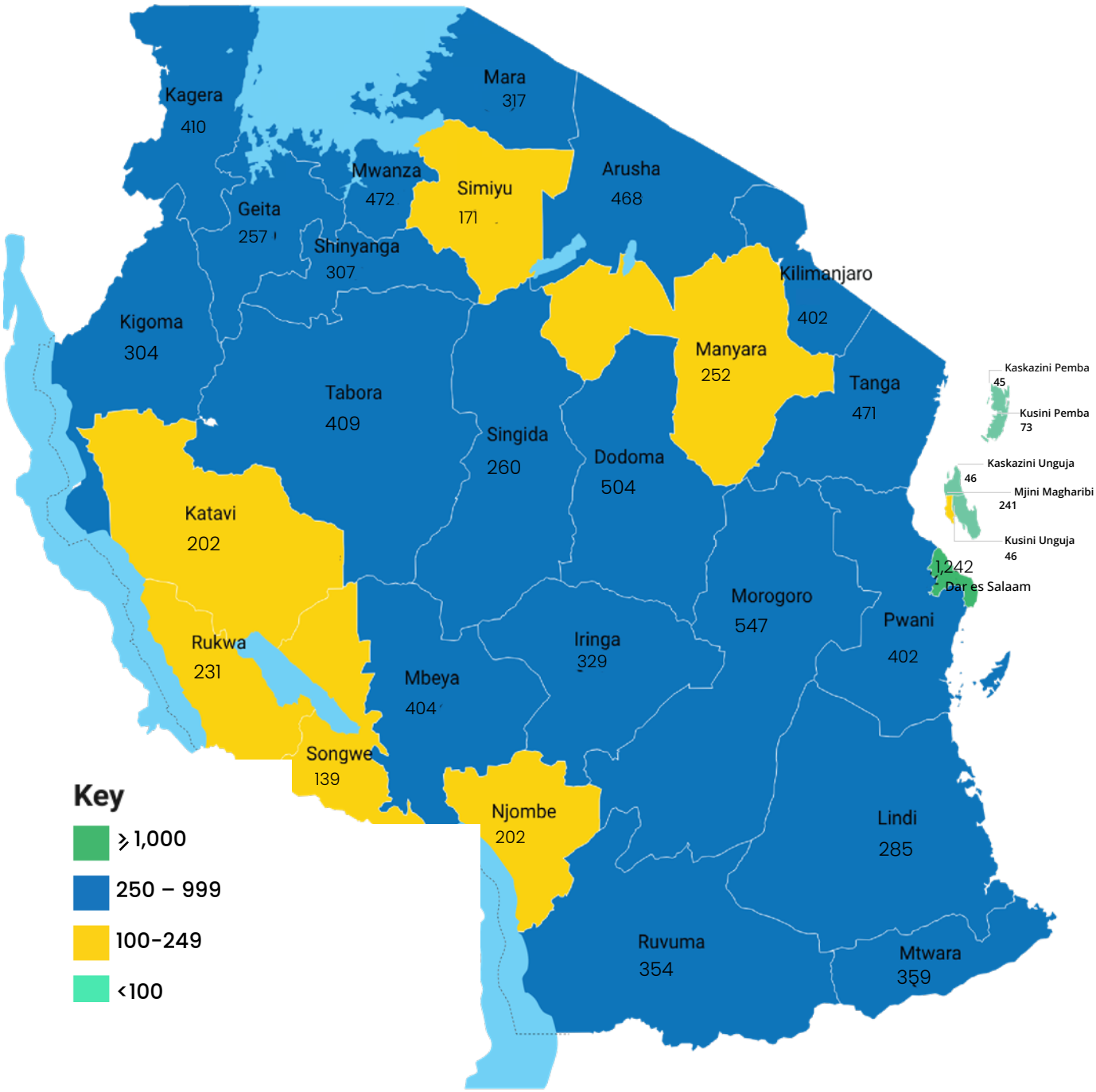
Table 1.5.1: User Devices Attached to Operators' Networks

Period	Number of devices	Penetration
Mobile Phone/Feature phone	58,557,316	83.61%
Smartphone	29,799,766	42.55%
Handheld	1,360,055	1.94%
Modem	799,934	1.14%
Tablet	514,720	0.73%
WLAN Router	569,917	0.81%
IoT Device	186,780	0.27%
Module	82,433	0.12%
Dongle	78,886	0.11%
Portable(include PDA)	71,035	0.10%
Connected Computer (with SIM card slot)	14,924	0.02%
Wearable	14,950	0.02%
Vehicle	7,062	0.01%
Device for the Automatic Processing of Data (APD)	4,409	0.01%
Others	4,890	0.01%
e-Book	26	0.00%
Mobile Test Platform	2	0.00%

1.6 Number of Telecom Towers

Expansion of telecommunication towers aims to connect the unconnected and bridge the digital divide. This is guaranteed by the presence of resilient, inclusive, environmental-friendly and future-ready infrastructure. The status shows that towers are constructed in all regions to ensure that services are available in all inhabited areas. During the period under review, a total of 10,084 towers were recorded, with Dar es Salaam leading with 1,242 towers. The distribution of telecom towers per region, shown in Figure 1.6.1, is influenced by population size and economic activities.

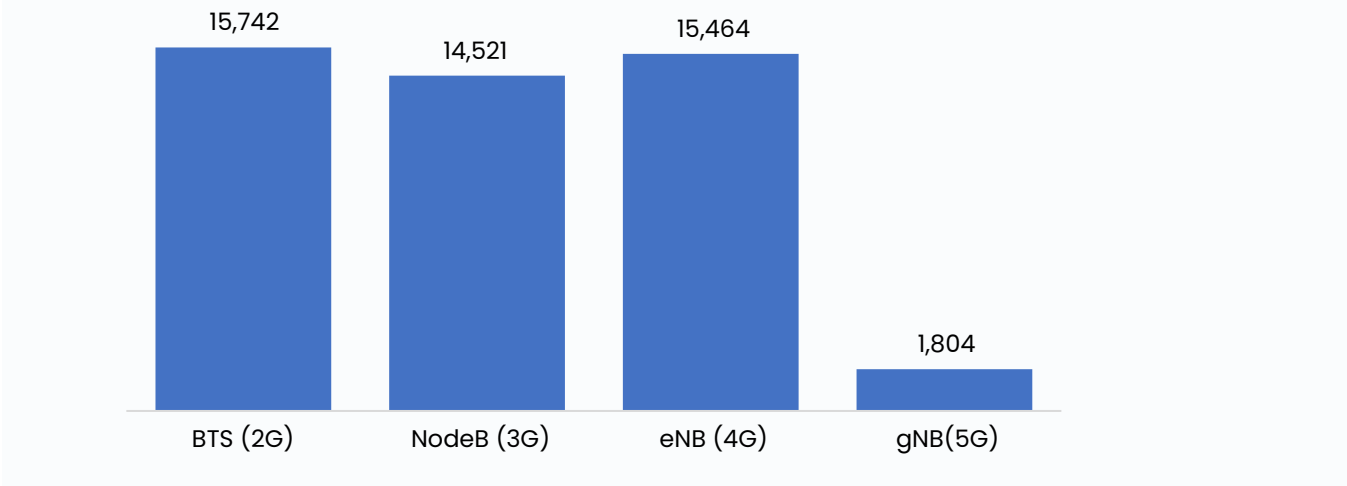
Figure 1.6.1: Distribution of Telecom Towers per Region



1.7 Radio Base Stations Distribution

Deployment of Radio Base Stations across the country indicates a robust foundation for mobile connectivity. Figure 1.7.1 shows a substantial rollout of 2G, 3G and 4G technologies with 15,742 BTS, 14,521 NodeBs, and 15,464 eNBs, respectively. Additionally, rollout of 5G increased by 44%, reaching 1,804 gNBs.

Figure 1.7.1: Radio base stations distribution per technology



Notably, Dar es Salaam leads in all categories, underscoring its status as the country's major hub for connectivity as shown in Table 1.7.1 which further illustrates the distribution of radio base stations per region.

Table 1.7.1: Distribution of Radio Base Stations per Region

Region	Number of radio base stations			
	(2G)	NodeB (3G)	eNB (4G)	gNB (5G)
Tanzania Mainland				
Arusha	781	730	765	78
Dar-es-salaam	2453	2406	2536	1121
Dodoma	799	664	780	94
Geita	463	447	465	15
Iringa	444	392	438	17
Kagera	573	558	565	6
Katavi	195	179	189	8
Kigoma	509	507	512	8
Kilimanjaro	602	563	582	16
Lindi	380	291	348	7
Manyara	389	310	357	5
Mara	447	437	445	8
Mbeya	645	614	639	53
Morogoro	814	706	801	31
Mtwara	460	377	427	6
Mwanza	789	792	797	93
Njombe	349	292	338	6
Pwani	602	518	591	31
Rukwa	307	297	296	4
Ruvuma	467	373	418	8
Shinyanga	421	414	420	17
Simiyu	320	312	311	5
Singida	390	343	372	7
Songwe	266	254	253	19
Tabora	592	564	582	12
Tanga	672	576	623	14
Zanzibar				
Kaskazini Pemba	67	65	62	3
Kaskazini Unguja	97	92	95	5
Kusini Pemba	73	72	71	4
Kusini Unguja	109	105	110	8
Mjini Magharibi	267	271	276	95
Total	**15,742**	**14,521**	**15,464**	**1,804**

1.8 Roll Out of Mobile Network

Investment in the telecommunication infrastructure has increased the rollout of mobile network coverage. A notable increase was observed for 5G network, with geographical and population coverage expanding to 11.04% and 32.83%, respectively, during the period under review, as indicated in Table 1.8.1.

Table 1.8.1: Network Coverage for Mobile Network Signal

		December 2025	March 2026
Population Coverage	2G	98.64%	98.65%
	3G	93.92%	93.94%
	4G	94.21%	94.32%
	5G	30.13%	32.83%
Geographical Coverage	2G	79.47%	79.62%
	3G	76.18%	76.31%
	4G	77.31%	77.43%
	5G	10.54%	11.04%

1.9 Internet Services

A notable increase of 1.5% in internet subscriptions and 15.3% in internet usage has been observed during the quarter ending March 2026. Such an increase indicates a sustained demand for broadband services. Additionally, monthly internet subscription is shown in Table 1.9.1.1.

1.9.1 Internet Subscription

As of December 2025

58.1 Million

As of March 2026

58.9 Million

1.5% ↑

Table 1.9.1.1: Monthly Internet Subscriptions for the Quarter ending March 2026

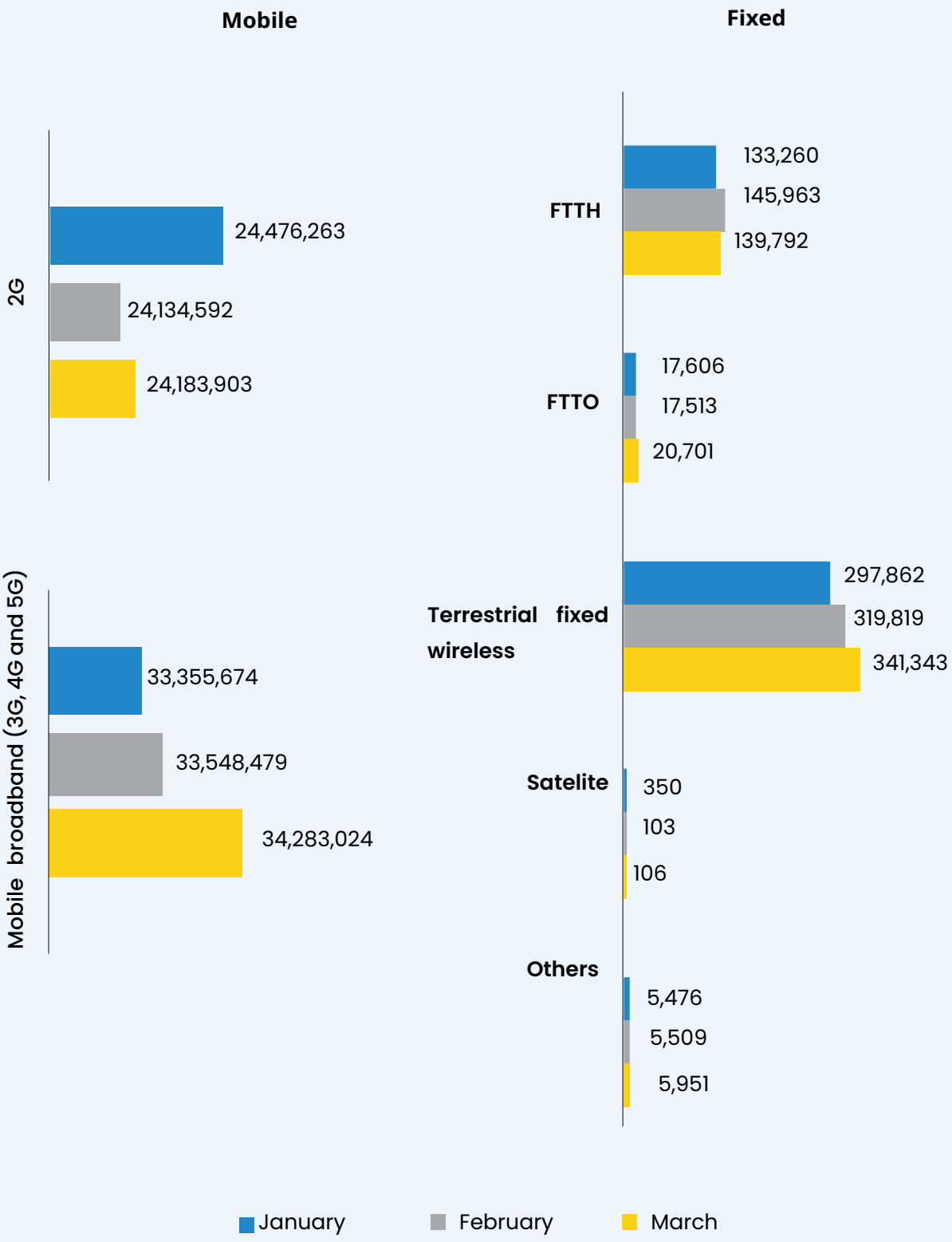
Month	Mobile Wireless Subs	Fixed Wireless Subs	Fixed Wired Subs	Total
January	57,831,937	303,688	150,866	58,286,491
February	57,683,071	325,431	163,476	58,171,978
March	58,466,927	347,400	160,493	58,974,820
Internet Penetration				84.20%

Mobile broadband is the most popular means of accessing Internet, with 34,283,023 subscriptions. 2G technology holds significant usage with 24,183,903 subscriptions. Fiber technologies like Fiber to the Home (FTTH) and Fiber to the Office (FTTO) have fewer subscriptions compared to mobile, as shown in Figure 1.9.1.1.

Table 1.9.1.2: Fixed Internet Subscriptions by Speed

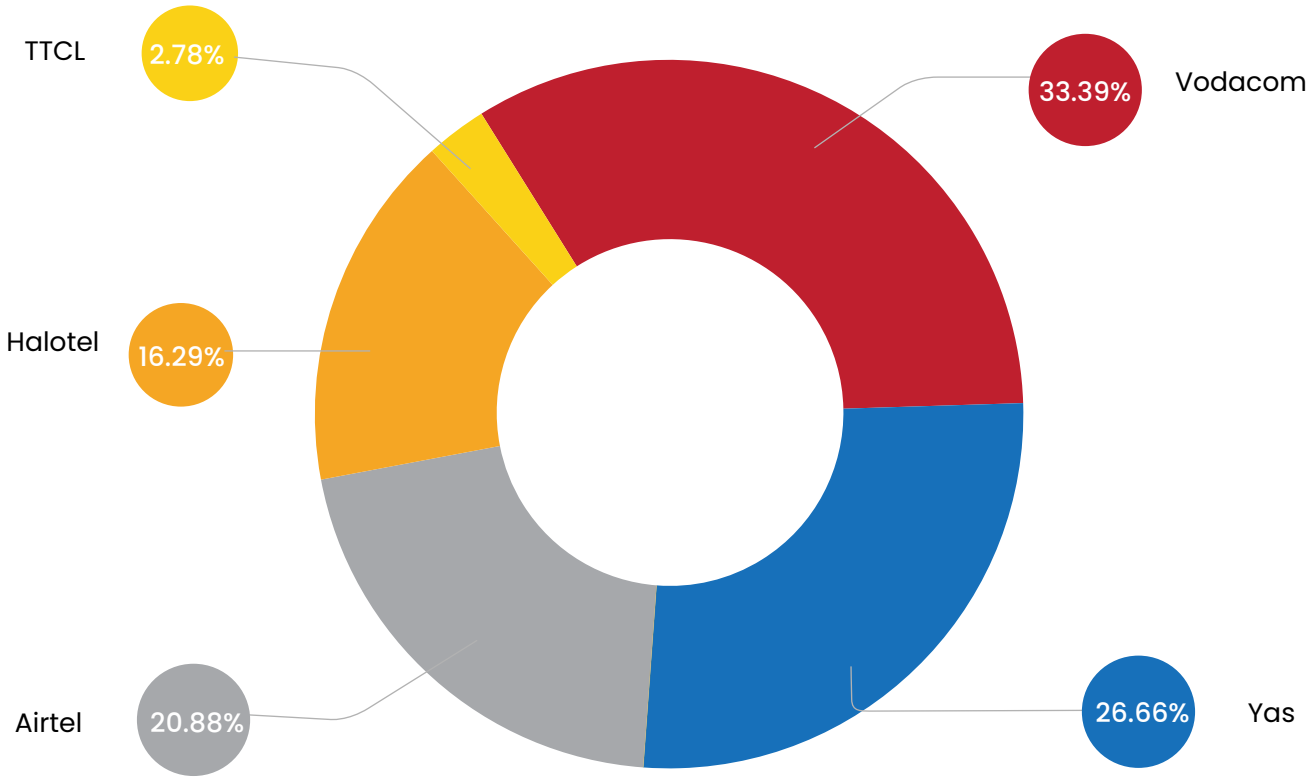
Fixed Internet Speed	Subscriptions
<256 Kbps	10
>= 256 Kbps< 2Mbps	1,466
>= 2Mbps< 10Mbps	63,407
>=10Mbps<30Mbps	281,346
>=30Mbps<100Mbps	146,771
>= 100Mbps< 1Gbps	14,158
>= 1Gbps	735
Total	507,893

Figure 1.9.1.1 Internet Subscription by Technology



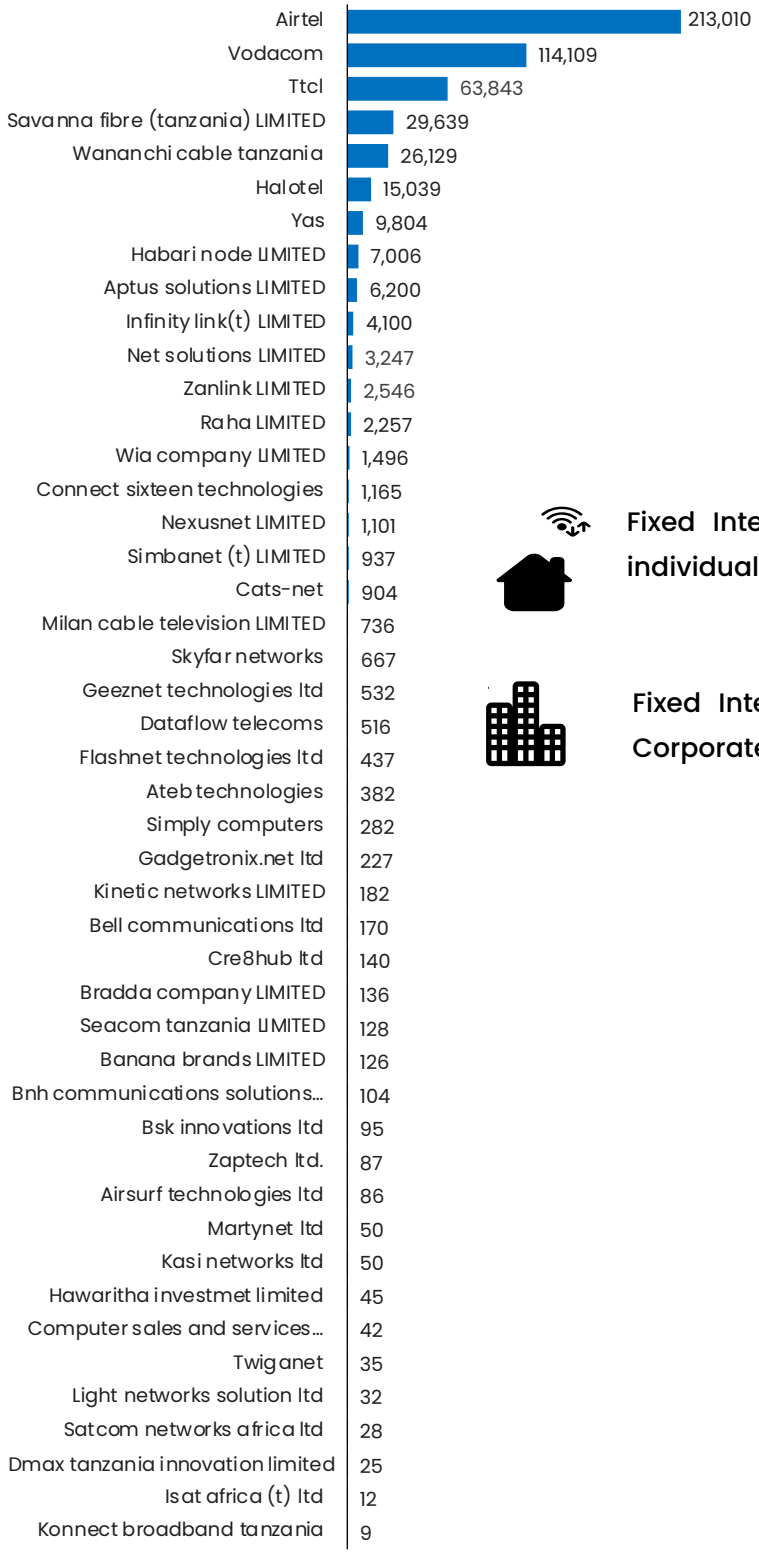
The mobile internet market share by subscription continues to exhibit high competition which is necessary in promoting affordability as shown in Figure 1.9.1.2

Figure 1.9.1.2: Mobile Internet Market Share by Subscription per Operator for the Quarter ending March 2026



The fixed internet market subscriptions per operator showed continued uptake on internet services as shown in a Figure 1.9.1.3.

Figure 1.9.1.3: Fixed Internet Subscriptions per Operator for the Quarter ending March 2026



Fixed Internet subscription for individuals was **404,050**

Fixed Internet subscription for Corporates was **103,843**

1.9.2 Internet Usage

Internet usage reflects the total volume of data traffic recorded during the reporting period. The snapshot below shows quarterly usage levels indicating a 15.3% increase in total traffic compared to the previous quarter.Additionally, Industry average latency was 68.85ms for nineteen measured service areas as shown in the table 1.9.2.1.

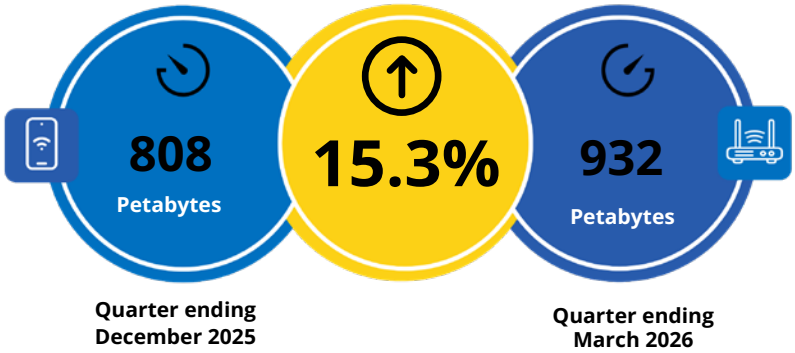


Table 1.9.2.1: Operators' Latency (Ms) in Measured Service Areas in the Quarter ending March 2026

Measured service area	Airtel	Halotel	Yas	TTCL	Vodacom	Average
Arusha	47.1	73.1	98.4	67.6	51.4	67.51
Ilala	83.1	61.2	63.8	51.7	41.3	60.21
Kigamboni	78.6	64.7	67.6	54.3	53.1	63.65
Kinondoni	72.7	53.3	72.6	58.6	36.3	58.69
Temeke	70.7	65.5	65.3	66.2	66.7	66.86
Ubungo	145.5	61.8	68.8	52.5	53.8	76.49
Iringa	55.4	69.4	96.4	73.3	43.7	67.62
Kilimanjaro	42.7	60.5	108.7	72.2	59.2	68.64
Mara	51.9	56.3	87.4	104.0	54.7	70.86
Mbeya	75.9	111.4	59.6	95.0	53.4	79.06
Morogoro	95.7	51.4	84.4	72.4	45.0	69.77
Mtwara	56.1	56.9	78.7	61.0	57.7	62.06
Mwanza	63.3	77.7	87.8	89.9	59.2	75.59
Njombe	49.0	71.8	84.6	66.0	57.9	65.87
Pemba	109.6	115.6	50.6	63.2	63.9	80.56
Shinyanga	57.4	54.2	99.8	77.0	53.9	68.44
Simiyu	64.4	53.6	111.7	70.9	57.0	71.52
Tanga	51.9	59.7	86.5	86.8	45.5	66.09
Unguja	112.1	68.8	48.7	63.7	50.0	68.65
Industry Average						68.85

Table 1.9.2.1: Amount of Data Used in Mobile Internet Services in the Quarter ending March 2026

	January	February	March
GB	144,373,420	139,503,183	146,949,030
Subscriptions	57,831,937	57,683,071	58,466,927
Mobile data GB per subcription	2.50	2.42	2.51

Table 1.9.2.1 indicates that 2.51 GB per subscription were used in March 2026 which is higher than January and February 2026. On the other hand, amount of data used in fixed internet services is as shown in table 1.9.2.2, while data usage in social media platforms is presented in table 1.9.2.3.

Table 1.9.2.2: Amount of Data Used in Fixed Internet Services in the Quarter ending March 2026

	January	February	March
GB	157,927,373	148,722,206	173,096,285
Subscriptions	454,554	488,907	507,893

Table 1.9.2.3: Data Usage per OTT Social Media Platform

Application Name	TTL Usage (GB)	Rank
YouTube	80,319	1
Tik Tok	72,097	2
Facebook	67,608	3
Instagram	35,361	4
WhatsApp	29,074	5
Snapchat	10,548	6
WeChat	7,972	7
Pinterest	992	8
Microsoft Teams	565	9
Linkedin	342	10

The observed growth in internet subscriptions and data consumption presents an opportunity for investment in broadband networks and digital services.

1.9.3 Average Internet Speed and Latency

Fixed broadband avarage internet speed and latency is shown, while operators download speed in nineteen measured services areas is shown in table 1.9.3.1

Figure 1.9.4: Average Internet Speed and Latency

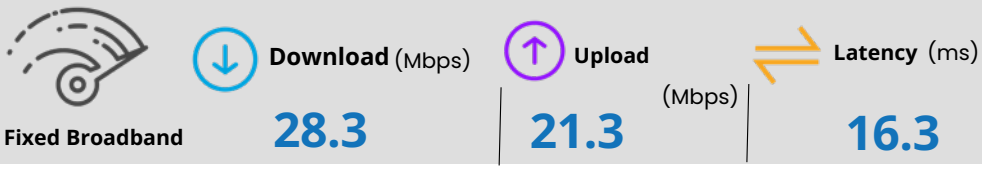


Table 1.9.3.1: Operators' Download Speed (Mbps) In Measured Service Areas in the Quarter ending March 2026

Measured service area	Airtel	Halotel	Yas	TTCL	Vodacom	Average
Arusha	20.0	9.9	21.2	17.9	16.7	17.13
Ilala	19.1	4.6	13.5	17.5	19.4	14.82
Kigamboni	17.6	9.6	12.5	15.7	18.7	14.82
Kinondoni	18.9	9.1	16.0	14.2	22.3	16.09
Temeke	19.8	6.2	14.8	16.8	16.3	14.78
Ubungo	20.6	4.9	16.5	17.3	22.3	16.34
Iringa	18.8	11.2	27.9	16.9	15.3	18.03
Kilimanjaro	18.9	12.5	28.9	18.6	19.9	19.74
Mara	16.8	10.5	18.1	15.6	16.4	15.47
Morogoro	13.2	4.9	10.7	18.8	15.2	12.55
Mtwara	10.4	13.4	20.3	15.9	13.5	14.69
Mwanza	15.6	12.3	21.3	15.9	21.1	17.25
Njombe	22.3	14.0	24.3	19.3	21.8	20.35
Pemba	7.2	5.7	23.3	17.6	22.3	15.21
Shinyanga	16.3	11.8	23.0	16.5	24.0	18.31
Simiyu	4.6	8.9	21.6	17.1	21.0	14.65
Tanga	16.7	10.3	21.0	19.2	23.1	18.05
Unguja	2.0	10.6	28.6	17.0	18.1	15.27
Industry Average						16.31

1.9.4 International Internet Link Capacity

International internet link capacity supports the exchange of data between Tanzania and global networks, enabling access to international content, cloud services, and online platforms. Based on activated capacity relative to total owned capacity, approximately 16.5% of international capacity is currently in use, leaving 14,775 Gbps equivalent to 83.5% of international capacity available for new

activation, as shown in Table 1.9.4.1. The available international excess capacity provides opportunity for investment in broadband services.

Table 1.9.4.1: International Internet capacity as of March 2026

	Outgoing capacity (Gbps)	Incoming capacity (Gbps)
Total /Owned	17,690	17,690
Activated	2,915	2,915
Available for new activation	14,775	14,775

The gap between available and utilized international link capacity presents an opportunity for more investment in broadband internet services.

1.9.5 Country Code Top Level Domains

The total cumulative number of registered domain names increased from 36,223 at the end of December 2025 to 38,409 by the end of March 2026, as shown in Table 1.9.5.1.

Table 1.9.5.1: Number of Domain Names

Zone	December 2025	March 2026
co.tz	28,379	30,288
or.tz	2,894	2,978
ac.tz	1,249	1,293
go.tz	947	951
.tz	2,409	2,529
sc.tz	284	302
ne.tz	25	28
me.tz	18	21
info.tz	6	6
hotel.tz	2	3
mobi.tz	3	3
tv.tz	3	3
mil.tz	4	4
Total	**36,223**	**38,409**

1.10 Mobile Money Services

This section presents statistics on mobile money services provided by Mobile Network Operators (MNOs) in terms of subscriptions (number of mobile money accounts) and transactions.

1.10.1 Mobile money subscriptions

Mobile money subscriptions refer to the count of all SIM cards with mobile money service accounts that have registered an activity/have been used at least once in the past three months. The subscriptions increased by 5.9% from 76.47 million accounts in the quarter ending December 2025 to 80.98 million in the quarter ending March 2026 as shown in figure 1.10.1.1.

Figure 1.10.1.1: Mobile money subscriptions

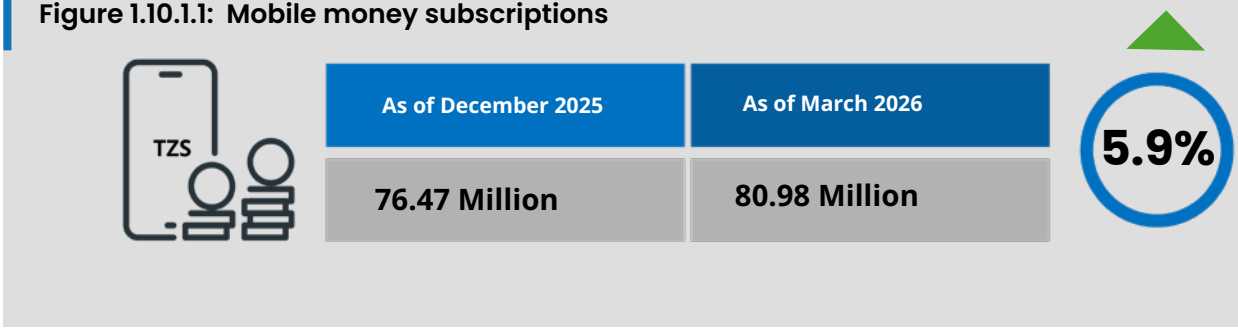


Table 1.10.1.1: Mobile Money Subscriptions per Operator

	January	February	March
Airtel Money	14,583,309	14,483,495	14,402,391
Azam pesa	74,732	74,732	73,877
HaloPesa	7,358,608	7,748,580	7,631,532
Mixx by Yas	23,618,330	24,326,880	25,116,691
T-Pesa	536,793	566,977	578,850
M-pesa	31,574,589	31,689,786	33,173,927
Total	77,746,361	78,890,450	80,977,268

Figure 1.10.1.2: Market Share on Mobile Money Subscriptions as of March 2026

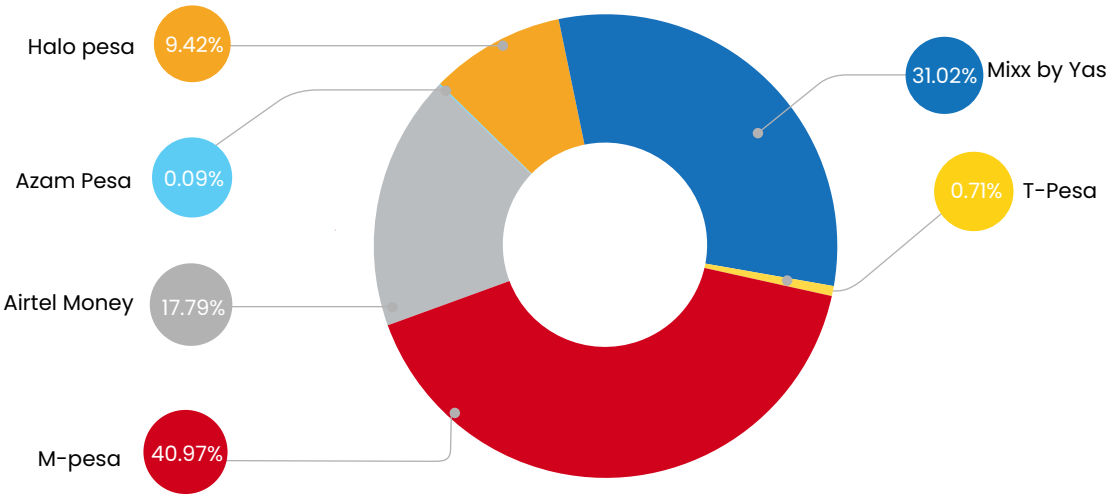


Figure 1.10.1.2 indicates that the mobile money market is very competitive as Mixx by Yas, M-Pesa, and Airtel money control around 89.78% of the market share by subscription, led by M-Pesa with 40.97% market share.

1.10.2 Mobile Money Transactions

The trend of mobile money transactions increased by 7.4% for the quarter ending March 2026, as compared to December 2025, as shown in figure 1.10.2.1. Additionally, number of transactions increased by an average of 11% throughout the quarters.

Table 1.10.2.1: Mobile Money Transactions

	January	February	March
Airtel Money	130,572,078	118,053,119	137,714,126
Azam Pesa	2,431,099	2,431,099	2,845,248
HaloPesa	18,742,019	50,835,787	60,192,110
TTCL	156,537	165,522	192,345
Mpesa	249,591,512	241,780,918	308,717,427
Mixx by Yas	228,286,180	205,697,154	233,090,105
Change	629,779,425	618,963,599	742,751,361

Figure 1.10.2.1: Market share on Mobile Money Transactions as of March 2026

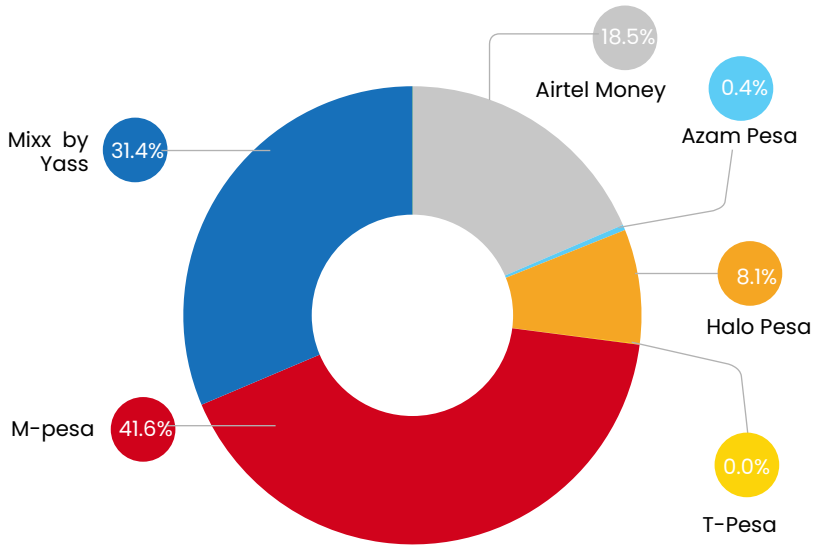
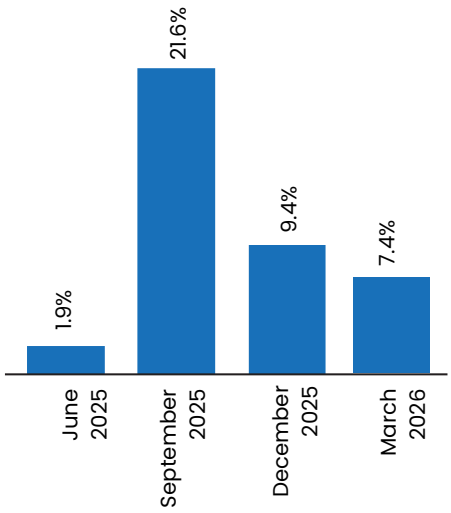


Figure 1.10.2.2: Trend of Growth of Mobile Money Transactions



1.11 Quality of Service (QoS)

QoS measurements were conducted considering the QoS parameters and measurement methods specified in the Electronic and Postal Communications (Quality of Service) Regulations, 2025. The summary of the results on the QoS of mobile networks in Tanzania from January to March 2026 includes various categories such as network availability, call connection success rate, call drop rate and voice service quality. The general quality of service result from january to March 2026 inidcate that YAS scored 98.5%,Vodacom 98.0%, Airtel 92.6%, TTCL 91.8%, Halotel 90.6%, as shown in the table 1.11.1.

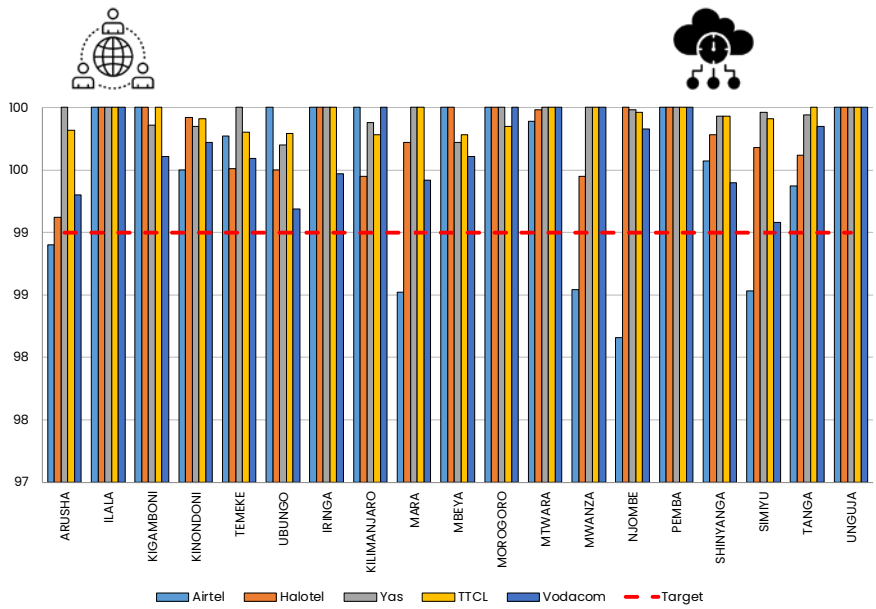
Table 1.11.1: Summary of QoS Scores per MNO for the Quarter ending March 2026

Operator	
Yas	98.5%
Vodacom	98.0%
Airtel	92.6%
TTCL	91.8%
Halotel	90.6%
Industry Average	**94.3%**

1.11.1 Network Availability

Network Availability measures how well the mobile network is available when consumers want to use mobile network services. The threshold for compliance is greater than 99%. Halotel, Yas , TTCL and Vodacom passed the target in nineteen areas out of the nineteen measured service areas while airtel passed the target in fourteen areas out of the nineteen measured service areas as shown in figure 1.11.1.1

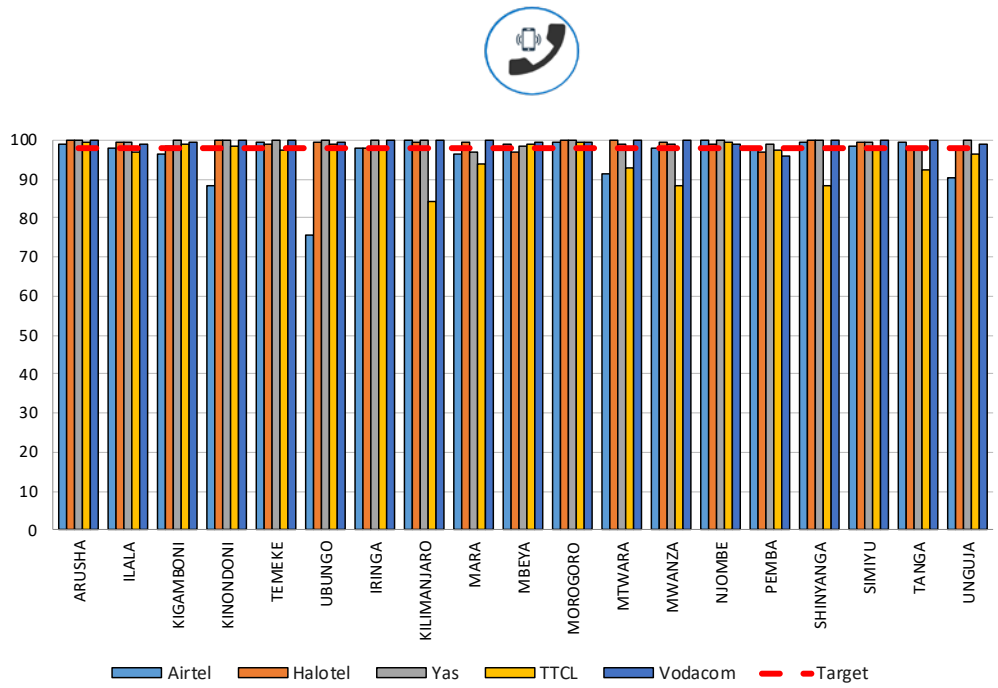
Figure 1.11.1.1: Network Availability



1.11.2 Call Connection Success Rate

The Call Connection Success Rate measures the percentage of calls that have successfully connected after dialing. The threshold for compliance is 98% and above. Vodacom passed the target in eighteen areas out of nineteen measured services areas, Yas passed the target in seventeen, Halotel passed the target in fifteen, Airtel passed the target thirteen, and TTCL passsed the target in eight out of nineteen measured services areas, as shown in figure 1.11.2.1

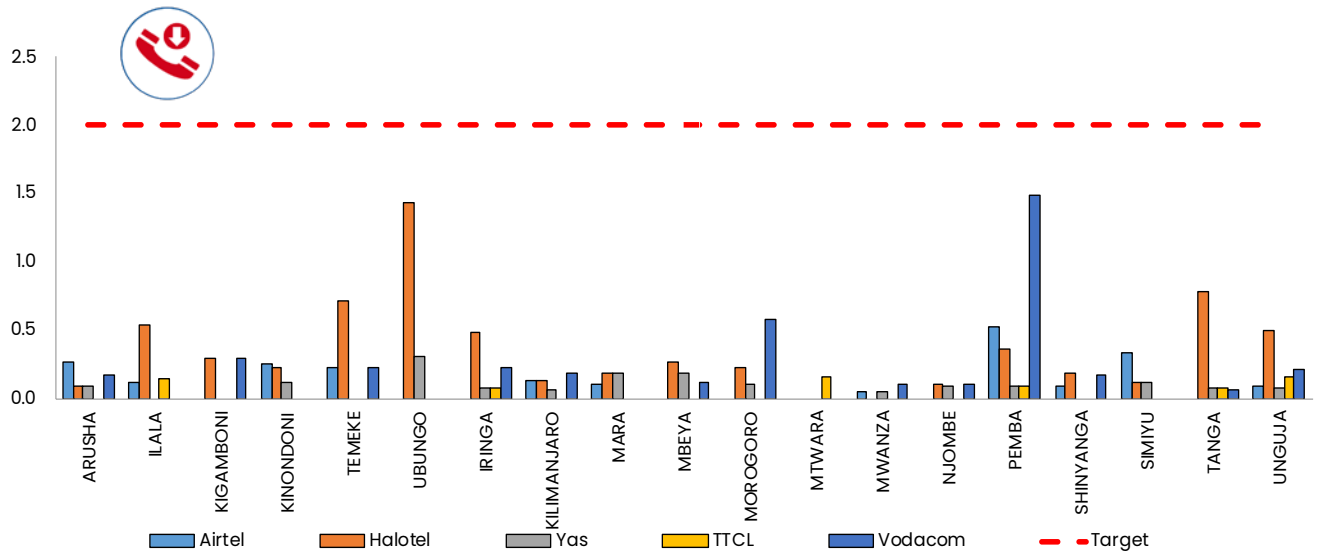
Figure 1.11.2.1: Comparative Results on the Call Connection Success Rate



1.11.3 Call Drop Rate

Call Drop Rate measures the percentage of calls cut off due to technical reasons before the speaking parties finish their conversation and one of them hangs up (dropped calls). The threshold for compliance is less than 2%. All mobile network operators passed the target in nineteen out of nineteeen measured service areas as shown in figure 1.11.3.1.

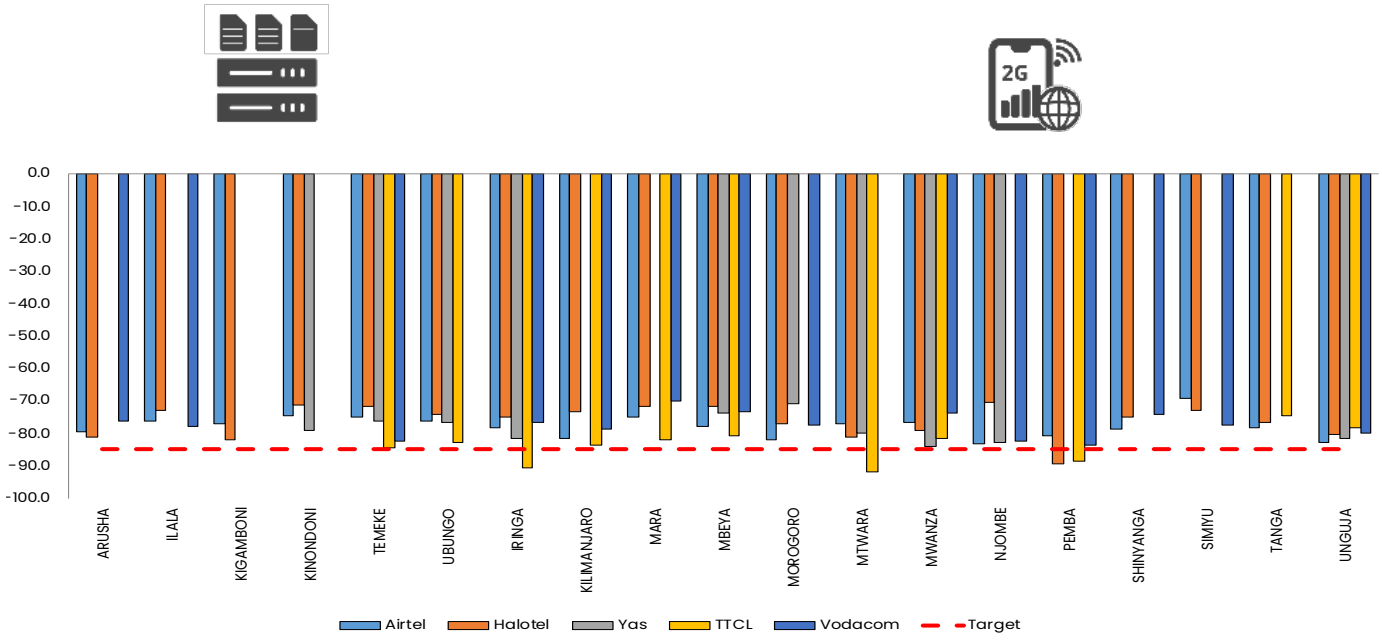
Figure 1.11.3.1: Comparative results on the Call Drop Rate



1.11.4 2G Service coverage

2G Service coverage indicates how well service areas are covered by a particular mobile network operator signal for consumers to get mobile network service. Consumers cannot get 2G mobile network services in areas with no coverage or very poor coverage. The threshold for compliance for 2G technologies is -85 dBm. Airtel passed the target in nineteen areas out of nnineteen measured service areas, Halotel passed the target in eighteen areas out of nineteen measured service areas, Yas passed the target in ten areas out of ten measured service areas, Vodacom passed the target in fourteen areas out fourteen measured service areas and TTCL passed the target in eight areas out of eleven measured service areas as shown in figure 1.11.4.1

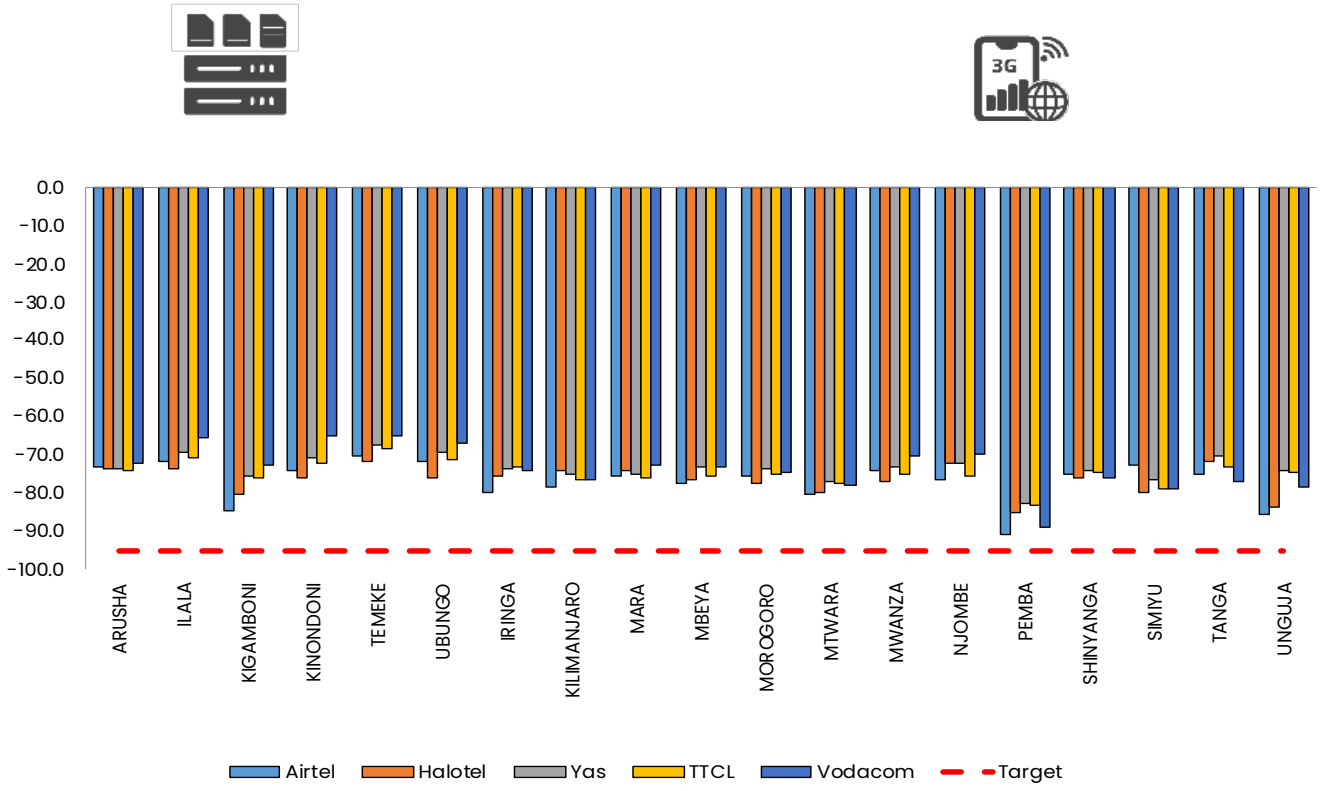
Figure 1.11.4.1: Comparative Results on 2G Coverage



1.11.5 3G Service Coverage

The 3G Service coverage indicates how well service areas are covered by a particular mobile network operator signal for consumers to get mobile network service. Consumers cannot get 3G mobile network services in areas with no coverage or very poor coverage. The threshold for compliance for 3G technologies is -95 dBm. All operators passed the target in nineteen areas out of nineteen measured service areas as shown in figure 1.11.5.1.

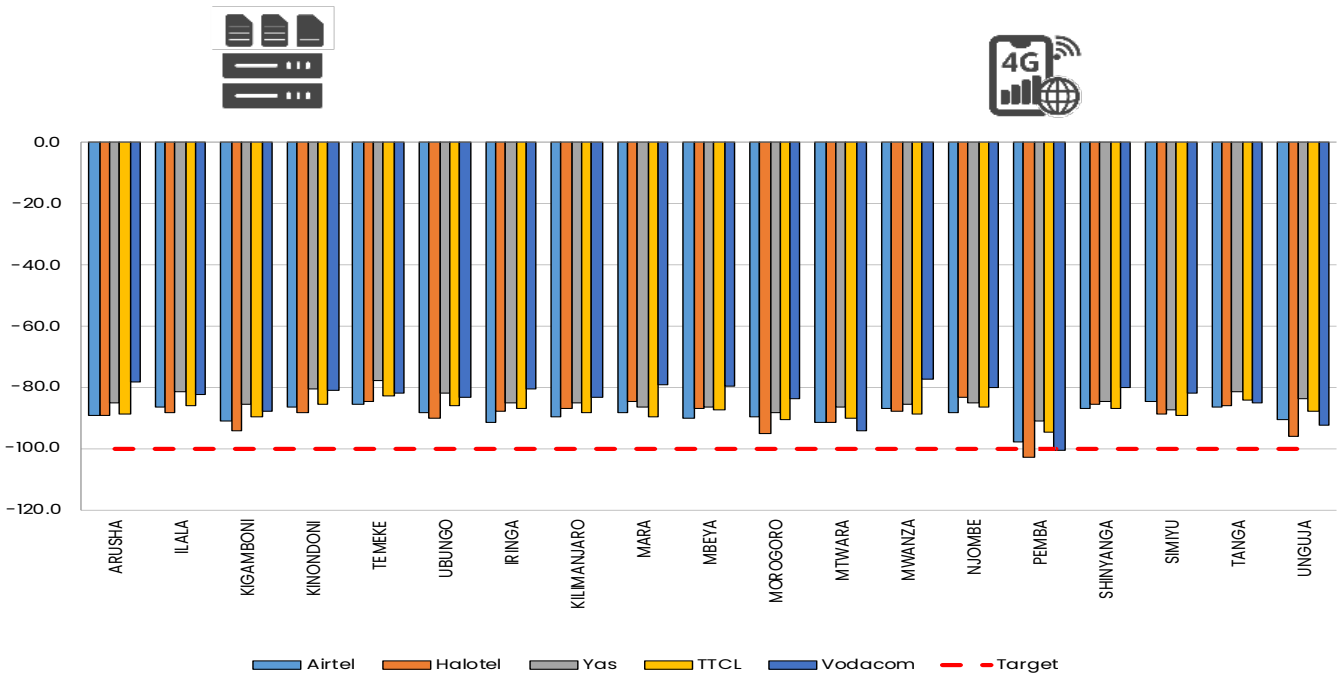
Figure 1.11.5.1: Comparative results on 3G Coverage



1.11.6 4G Service Coverage

4G service coverage indicates how well service areas are covered by a particular mobile network operator signal for consumers to get mobile network service. Consumers cannot get 4G mobile network services in areas with no coverage or very poor coverage. The threshold for compliance for 4G technology is -100 dBm. Halotel,Yas and TTCL passed the target in nineteen areas out of nineteen measured service areas, while Halotel and Vodacom passsed the target in eighteen areas out of the nineteen measured service areas as shown in figure 1.11.6.1.

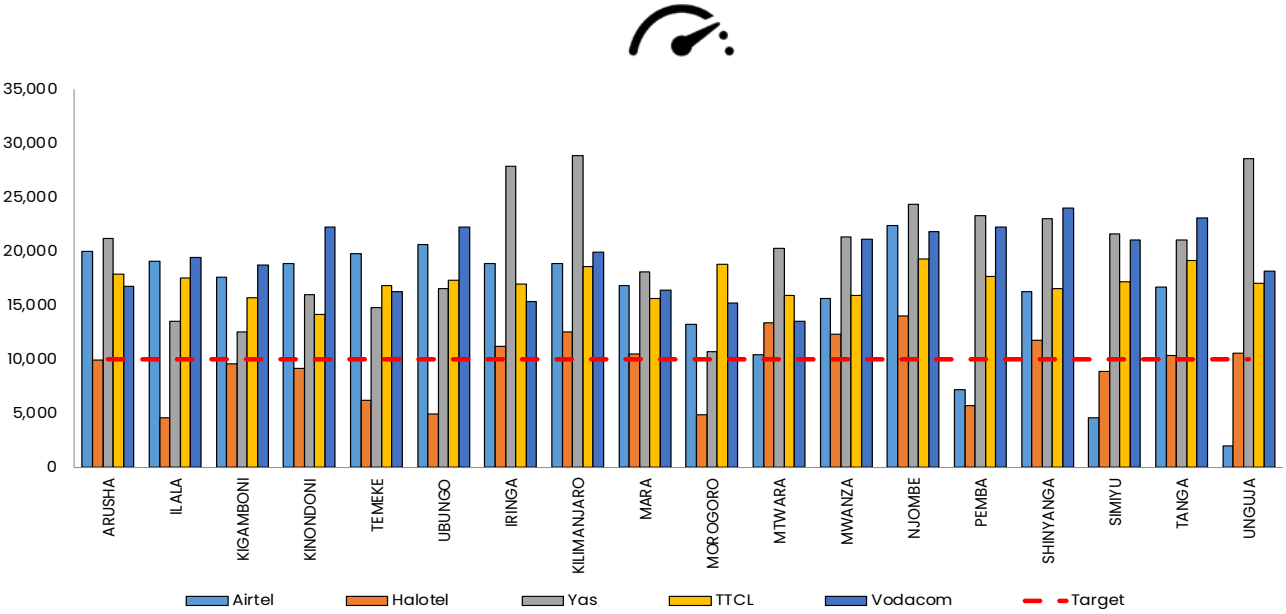
Figure 1.11.6.1: Comparative results on 4G coverage



1.11.7 Data Speed

Data Speed is a measure of the rate of data transfer on a network. It measures how fast data is transferred from a file transfer protocol (FTP) server to a mobile device. The compliance threshold is average, greater or equal to 10,000 kbps. Yas and TTCL,Vodacom passed the target in eighteen areas out eighteen measured service areas. Airtel passed the target in fifteen areas out of eighteen measured areas, Halotel passed the target in nine areas out of eightteen measured service areas

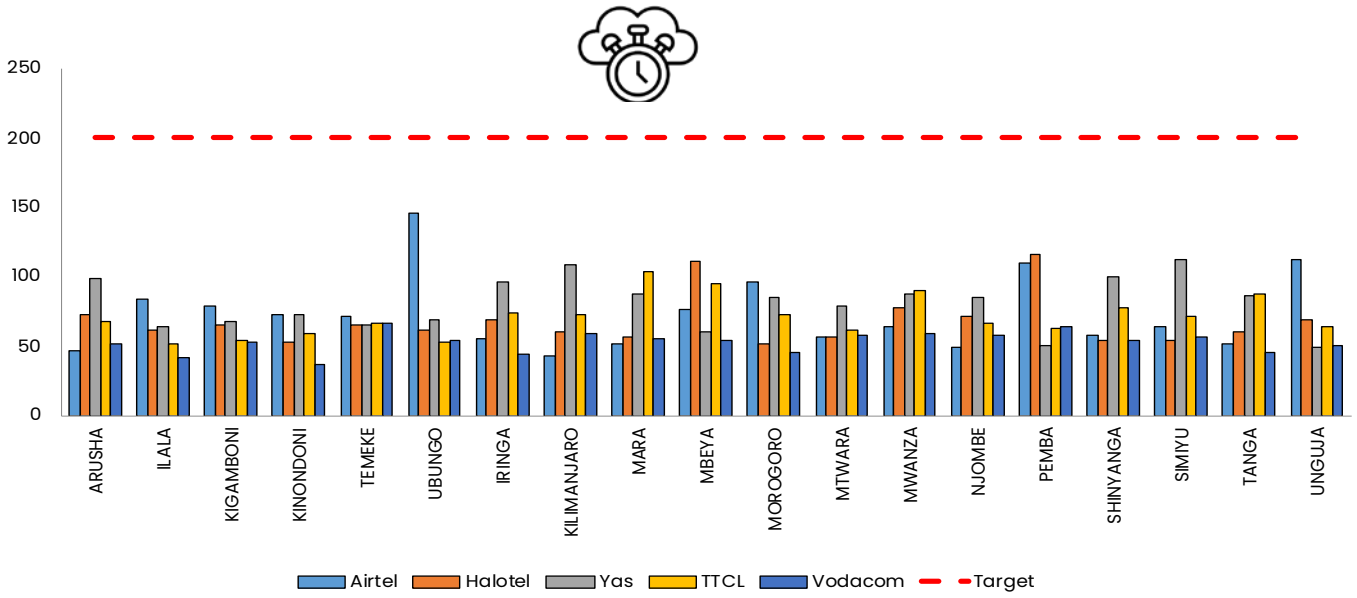
Figure 1.11.7.1: Comparative Results on Data Speed



1.11.8 Data Access Delay (Latency)

Data Access delay measures the time the user equipment takes to send a request and receive a response from the server. The threshold for compliance is average, being less than 200 ms. All mobile network operators passed the target in nineteen areas out of nineteeen measured service areas as shown in the figure 1.11.8.1

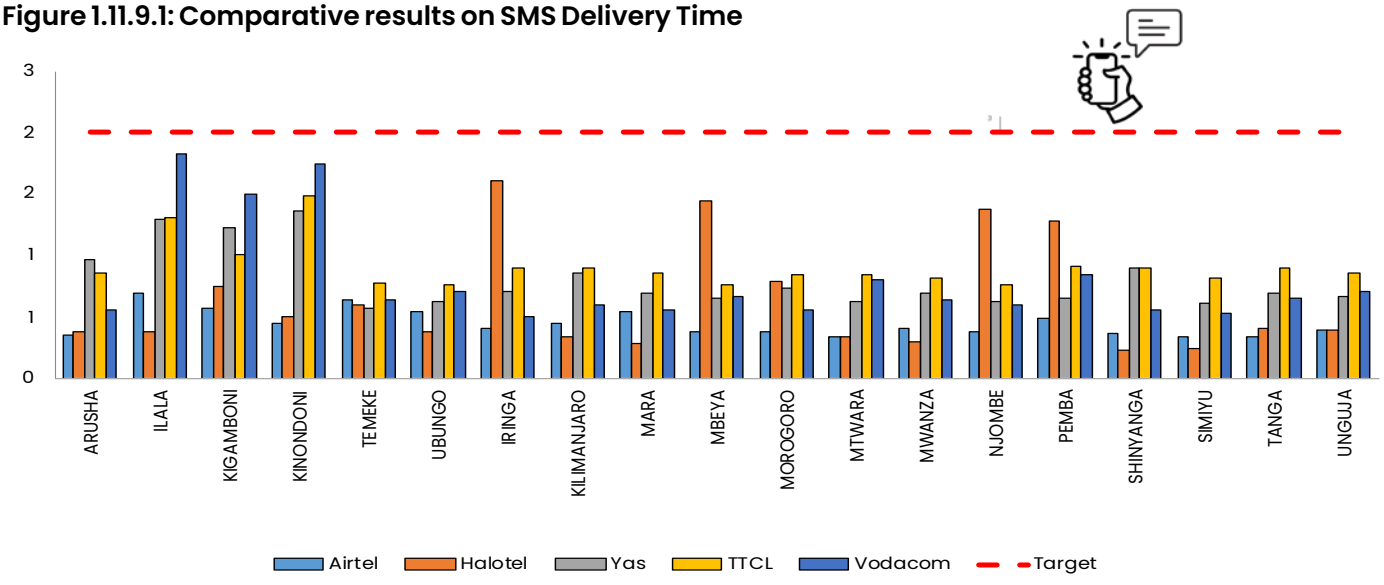
Figure 1.11.8.1: Comparative Results on Data Access delay



1.11.9 SMS Delivery Time

SMS Delivery Time measures the amount of time an SMS takes from when it is sent to when it is delivered. The threshold for compliance is less than 2 seconds. All Operators passed the target in nineteen areas out of nineteen measured service areas as shown in figure 1.11.9.1.

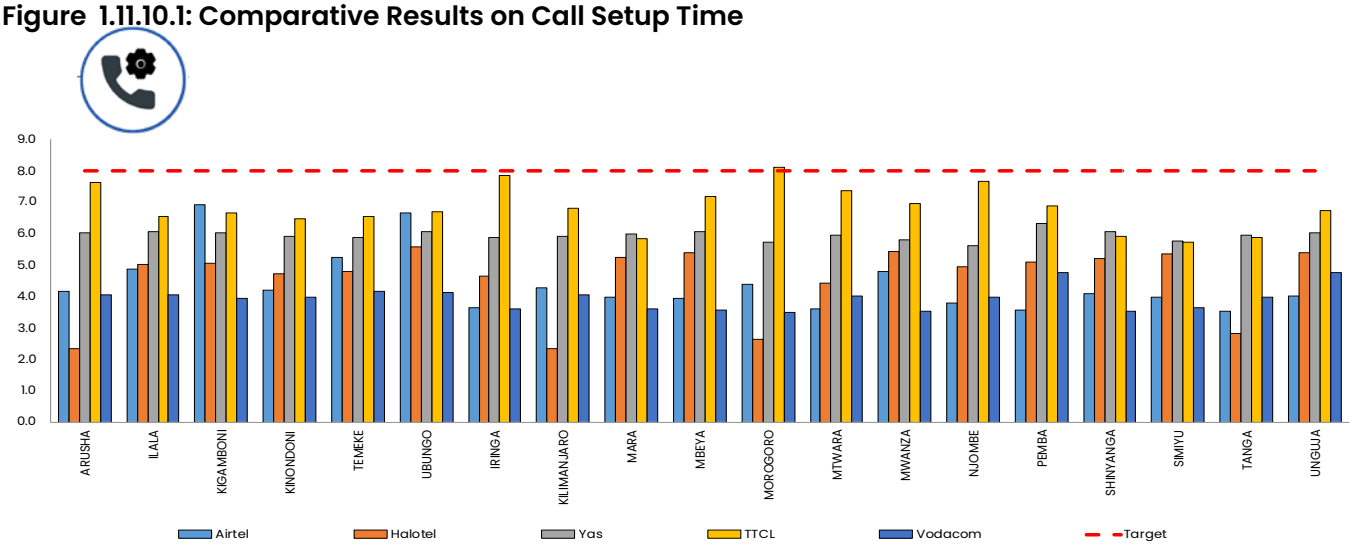
Figure 1.11.9.1: Comparative results on SMS Delivery Time



1.11.10 Call Setup Time

Call Setup Time measures the time a call takes to connect after dialling. The threshold for compliance is less than 8 seconds. Airtel, Halotel, Yas and Vodacom passed the target in nineteen areas out of nineteen measured service areas while TTCL passed the target in eighteen areas out of nineteen measured service areas as shown in figure 1.11.10.1.

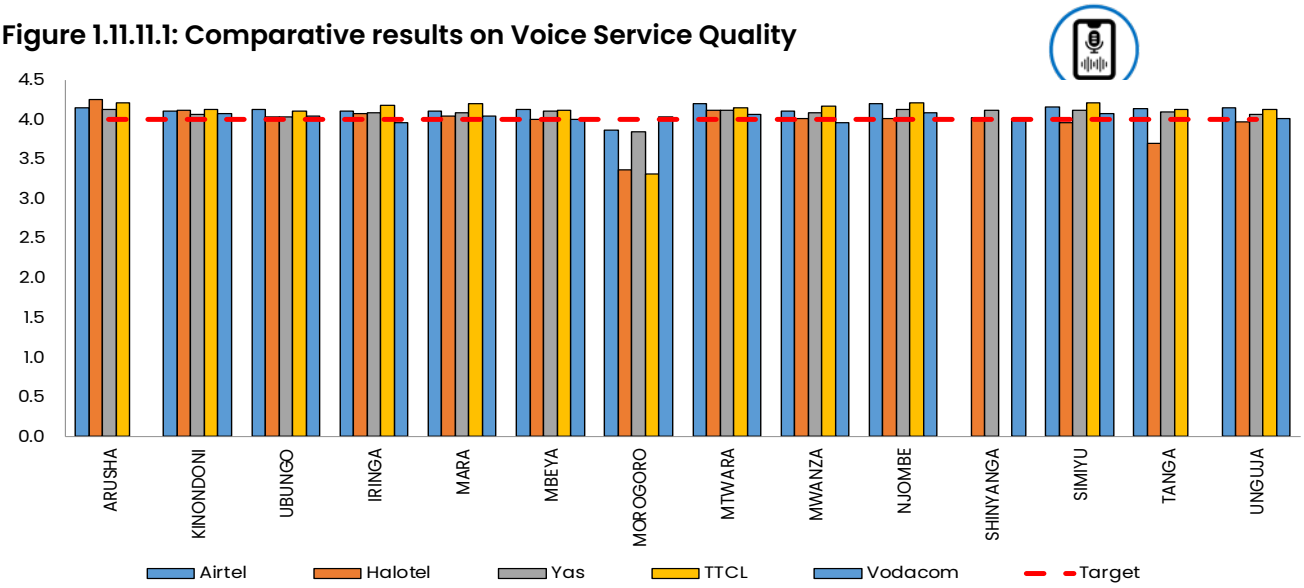
Figure 1.11.10.1: Comparative Results on Call Setup Time



1.11.11 Voice Service Quality (MOS)

Voice Service Quality (MOS) is a measure of the perception of the audio quality of the conversation during a call. The MOS Score scale ranges from 1 to 5, with 1 being poor and 5 being excellent audio quality. The threshold for compliance is an average of all Voice Quality (MOS) measurement samples being greater than 4. Airtel, Yas,TTCL passed the target in thirteen areas out of fourteen measured service areas while Halotel passed the target in nine areas out of fourteen measured service areas and Vodacom passed the target in nine areas out of twelve measured service areas as shown in figure 1.11.11.1.

Figure 1.11.11.1: Comparative results on Voice Service Quality



1.12 Fraudulent Attempts

Statistics show an increase of 3.9% from 9,450 fraudulent attempts reported in the quarter ending December 2025, to 9,816 fraudulent attempts reporteted in the quarter ending March 2026 as shown in Table 1.12.1. While TTCL has recorded the highest number of fraudulent attempts compared to other MNOs, statistics show mixed trends in fraudulent attempts across all operators. In addition, TTCL had largest share of fraudulents attempts reported as shown in figure 1.12.1. Table 1.12.2 shows the number of fraudulent attempts per region for the quarter ending March 2026.

Figure 1.12.1: Fraudulent Attempts per Operator in the Quarter Ending March 2026

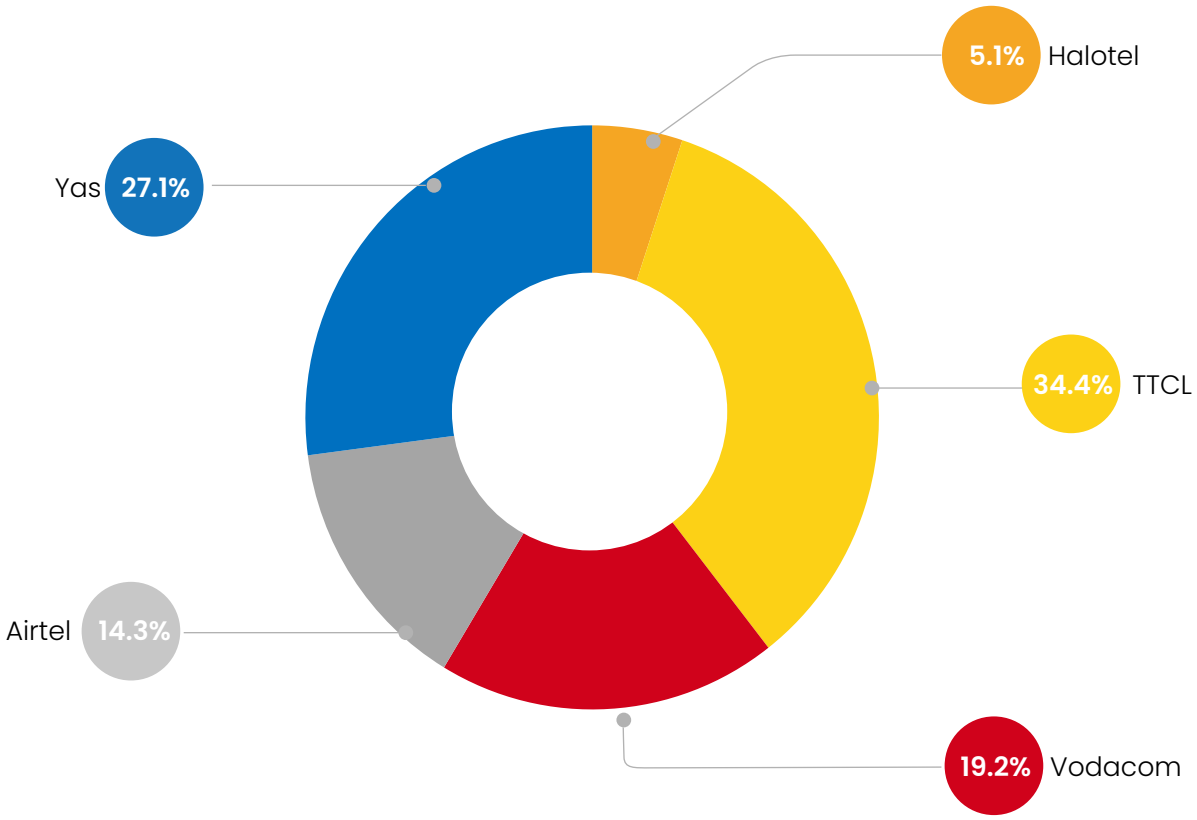


Table 1.12.1 Fraudulent attempts per operator

Quarter ending	Airtel	Halotel	Yas	TTCL	Vodacom	Total
March 2026	1,399	500	2,659	3,375	1,883	9,816
December 2025	1,174	1,149	2,257	2,225	2,645	9,450
Percentage change	19.2%	-56.5%	17.8%	51.7%	-28.8%	3.9%

Table 1.12.2: Number of Fraudulent Attempts per Region

Tanzania Mainland						
Region	**Airtel**	**Halotel**	**Yas**	**TTCL**	**Vodacom**	**Total**
Rukwa	128	134	216	3,027	440	3,945
Morogoro	313	108	1,387	6	786	2,600
Dar es salaam	516	63	185	27	128	919
Mbeya	31	34	102	33	113	313
Arusha	47	5	44	8	115	219
Katavi	_	13	10	151	24	198
Kilimanjaro	22		51	2	108	183
Mwanza	62	3	42	10	11	128
Pwani	25	18	58	7	11	119
Manyara	13	28	40	11	22	114
Dodoma	24	16	57	2	10	109
Mara	13	1	30	4	56	104
Songwe	29	22	32	11		94
Tanga	16	7	57	5	5	90
Njombe	4	9	57	1	4	75
Tabora	24	9	25	14	2	74
Geita	28	2	25	7	5	67
Kagera	17	1	39		9	66
Iringa	10	11	19	5	5	50
Shinyanga	11		18	8	9	46
Singida	8	1	25	7	5	46
Ruvuma	4	3	27	3	6	43
Simiyu	10	3	20	8	1	42
Mtwara	12	2	21	5		40
Mjini Magharibi	9	2	27		1	39
Kigoma	8	2	15	9	2	36
Lindi	7	3	16	3	1	30
Zanzibar						
Kusini Unguja	-	-	5	_	-	5
Kusini Pemba	-	-	3	1	-	4
Kaskazini Pemba	-	-	3	-	-	3
Kaskazini Unguja	-	-	**3**	-	-	**3**
Total	**1,399**	**500**	**2,659**	**3,375**	**1,883**	**9,816**

Figure 1.12.2 shows the distribution of fraudulent attempts per region with Rukwa and Morogoro recording the highest number of fraudulent attempts.

Figure 1.12.2: Distribution of Fraudulent Attempts per Region in the Quarter ending March 2026

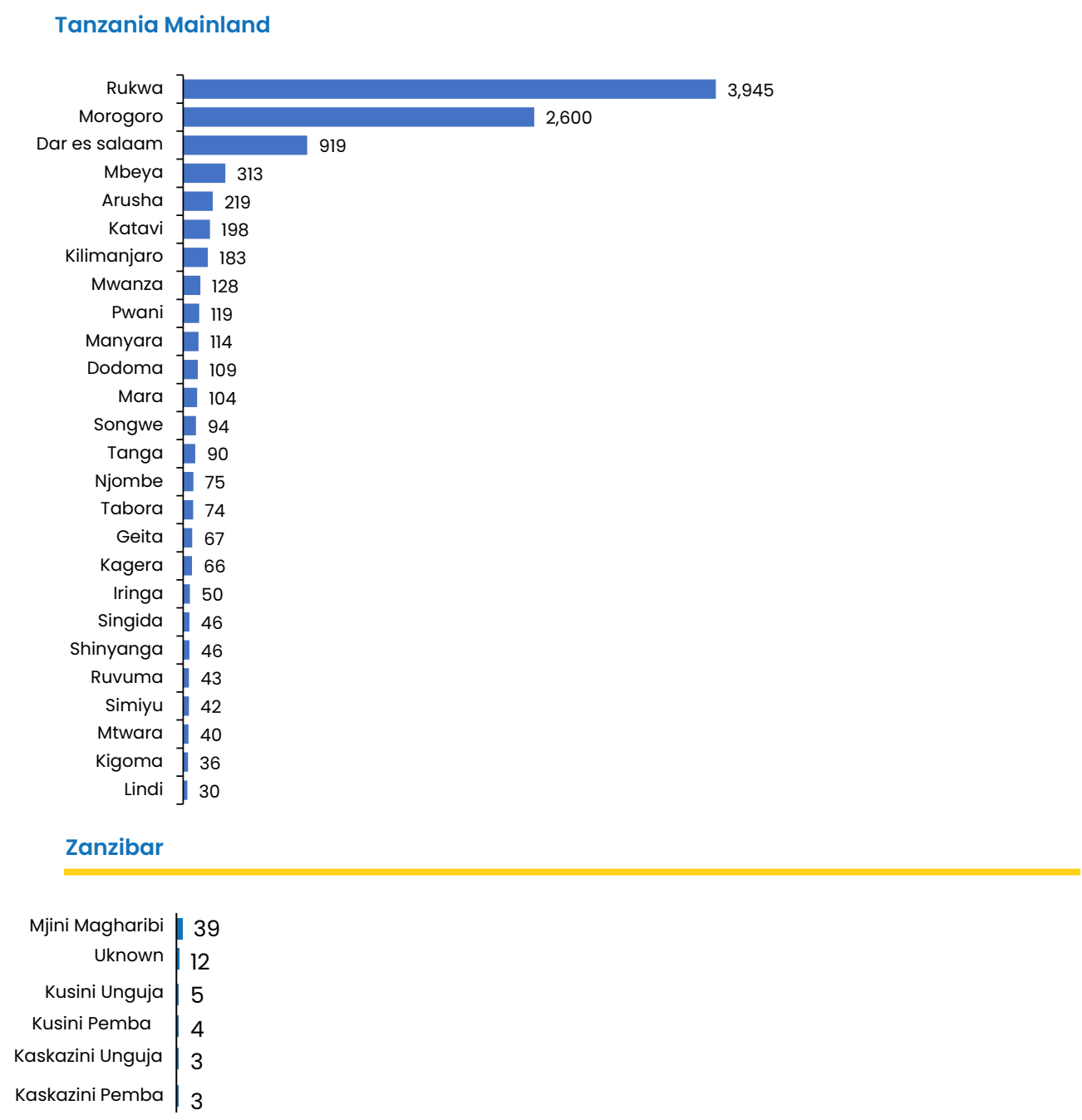


Table 1.12.3: Fraudulent Attempts per District for the Four Leading Regions

Region	District	Fraudulent attempts
Rukwa	Sumbawanga	1,830
	Nkasi	1,136
	Kalambo	979
Morogoro	Kilombero	2,297
	Ulanga	124
	Malinyi	58
	Kilosa	54
	Morogoro	40
	Mvomero	19
	Gairo	8
Dar es Salaam	Ubungo	275
	Ilala	232
	Temeke	193
	Kinondoni	192
	Kigamboni	27
Mbeya	Mbeya	615
	Mbozi	52
	Rungwe	42
	Mbarali	32
	Chunya	22

1.13. Telecommunication and Internet Service Licenses

There were 1,816 active licenses issued in telecommunication and internet service subsector as of March 2026 as shown in table 1.13.1.

Table 1.13.1: Telecommunication and internet Service Licenses

Category	Number licenses	
	December 2025	March 2026
Network Facilities Licences	48	52
Network Services Licences	24	25
Application Services Licences	159	173
Aircraft Stations	194	192
Amateur Stations	17	19
Fixed VSAT Terminals	21	18
Mobile VSAT Terminals	-	-
Satellite Ground Earth Stations	-	-
Ship Stations	42	43
HF Radio Stations	16	18
VHF- UHF Radio Repeaters		
VHF - UHF Radio Station with Pair of Frequency	125	126
VHF - UHF Radio Station with Single Frequency	184	179
Installation and Maintenance	225	241
National Distribution (wholesalers)	63	61
National Importation	178	182
Numbering	515	527

1.14. Certificates

There were 5,970 certificates issued in telecommunication and internet service subsector as of March 2026 as shown in table 1.14.1.

Table 1.14.1: Number of Certificates

Category	Months	
	December 2025	March 2026
Global Maritime Distress and Safety Systems	316	381
Type Approval	5,538	5,538
Registration for Satellite Mobile Phones	51	51

Telecommunication and Internet Annex Tables

Table 1 Trend of Telecom Subscription

Quarterly				
	June 2025	September 2025	December 2025	March 2026
Mobile Subscriptions	92,656,179	99,184,621	106,823,601	111,795,302
Fixed Subscriptions	79,619	111,169	111,600	111,933
Total Subscriptions	92,735,798	99,295,790	106,935,201	111,907,235
Penetration	**136.1%**	**145.7%**	**156.9%**	**159.8%**

Annual					
	2021	2022	2023	2024	2025
Mobile Subscriptions	54,044,384	60,192,331	70,215,144	86,769,161	106,823,601
Fixed Subscriptions	71,834	84,696	75,732	78,299	111,600
Total Subscriptions	54,118,218	60,277,027	70,290,876	86,847,460	106,935,201
Penetration	**88.0%**	**98.0%**	**111.0%**	**133.5%**	**156.9%**

Table 2: Quarterly Trend of Average Basic Local Tariffs per Minute in TZS

Local				
	June 2025	September 2025	December 2025	March 2026
On-net	26.00	29.00	29.00	29.00
Off-net	28.00	29.00	29.00	29.00

	2021	2022	2023	2024	2025
On-net	34.00	32.00	29.00	26.00	27.50
Off-net	34.00	32.00	30.00	28.00	28.50

International				
	June 2025	September 2025	December 2025	March 2026
EA	247.52	247.52	247.52	247.52
RoW	2,175.15	2,315.82	2,315.82	2,315.82

	2021	2022	2023	2024	2025
EA	966.00	1,103.00	1,171.00	684.00	342.59
RoW	1,564.00	1,817.00	1,776.00	2,055.00	2,185.45

Table 3: Trend of Average Basic Local and International SMS Tariffs in TZS

Quarterly				
	June 2025	September 2025	December 2025	March 2026
Local SMS	7.80	8.10	8.10	7.80
International SMS	189.60	189.60	189.60	189.60
Annual				
	2021	**2022**	**2023**	**2024**	**2025**
Local SMS	13.00	11.00	11.00	7.80	7.95
International SMS	172.00	193.00	200.00	189.60	189.60

Table 4: Quarterly Trend of Average Bundle Tariffs in TZS

Quarterly				
	June 2025	September 2025	December 2025	March 2025
On-net	4.80	5.48	5.11	4.80
Off-net	5.96	6.24	6.33	6.07
SMS	1.52	1.46	1.44	1.55
Data	2.12	2.08	2.06	2.12
Annual				
	2021	**2022**	**2023**	**2024**	**2025**
On-net	7.84	7.27	4.90	4.68	5.05
Off-net	8.69	7.78	6.30	6.22	6.15
SMS	3.35	2.69	1.37	1.46	1.49
Data	1.61	1.86	2.14	2.17	2.10

Table 5: Trend of On-net and Off-Net voice Traffic (in minutes)

Quarterly					
		June 2025	September 2025	December 2025	March 2026
On-net traffic		21,492,956,952	23,574,844,856	24,703,982,204	22,950,337,624
Off-net traffic		21,759,205,362	23,776,107,671	22,514,227,953	22,490,621,092
Total		**43,252,162,314**	**47,350,952,527**	**47,218,210,157**	**45,440,958,716**
Annually					
	2021	**2022**	**2023**	**2024**	**2025**
On-net Traffic	51,673,651,476	62,678,814,642	77,770,241,513	81,916,822,649	89,994,948,074
Off-net Traffic	43,194,917,029	60,064,367,493	67,100,445,506	76,215,903,038	88,394,850,674
Total	**94,868,568,505**	**122,743,182,135**	**144,870,687,019**	**158,132,725,687**	**178,389,798,748**

Table 6: Total traffic (in minutes) to/from East Africa (EA), Southern African Development Community (SADC) and Rest of the World (RoW)

Quarterly				
	June 2025	September 2025	December 2025	March 2026
To EA	156,913,941	143,487,145	147,904,598	157,378,250
From EA	34,761,058	39,343,813	42,845,139	42,566,883
To SADC	310,606	270,090	411,946	279,353
From SADC	835,650	618,503	908,220	533,936
To RoW	2,224,864	2,410,516	5,198,076	2,157,787
From RoW	4,155,135	3,466,597	6,813,551	4,360,996
Annual				
2021	**2022**	**2023**	**2024**	**2025**
To EA	9,097,165	8,927,113	95,473,684	363,293,881	577,704,620
From EA	15,853,362	13,594,473	34,994,641	108,663,455	147,959,242
To RoW	24,856,947	26,034,131	19,510,999	36,294,294	14,823,361
From RoW	49,885,142	33,374,619	23,681,940	24,858,074	22,412,244

Table 7: Local SMS traffic

Quarterly				
	June 2025	September 2025	December 2025	March 2026
On-net SMS traffic	22,301,400,244	22,288,636,639	24,195,043,702	91,398,139,909
Off-net SMS traffic	30,516,070,406	30,654,884,978	33,609,424,008	127,250,784,021
Total	52,817,470,650	**52,943,521,617**	**57,804,467,710**	218,648,923,930

Annual					
	2021	2022	2023	2024	2025
On-net SMS	58,875,779,663	65,358,270,089	84,818,793,761	84,909,556,665	89,866,764,116
Off-net SMS	78,200,512,436	88,154,239,625	121,727,776,013	116,828,465,147	123,717,687,842
Total	**137,076,292,099**	**153,512,509,714**	**206,546,569,774**	**201,738,021,812**	**213,584,451,958**

Table 8: SMS traffic to/from EA, SADC and RoW

Quarterly				
	June 2025	September 2025	December 2025	March 2026
To EA	427,754	461,683	388,998	57,273.0
From EA	10,495,680	11,533,796	601,520	149,752.0
To SADC	85,843	102,830	142,093	18,126.0
From SADC	952,425	902,391	407,450	112,001.0
To RoW	1,128,292	1,334,976	1,518,656	405,079.0
From RoW	2,118,318,349	2,667,331,794	2,033,965	140,348.0

Annual					
	2021	2022	2023	2024	2025
To EA	1,425,624	1,700,525	2,233,288	1,896,295	1,714,111
From EA	89,717,530	58,344,672	37,592,410	41,662,728	30,466,692
To RoW	3,191,041	3,574,956	5,448,764	13,342,306	5,658,259
From RoW	4,599,468,894	4,664,200,079	5,562,047,440	5,798,188,788	6,576,719,572

Table 9: Trend of Internet Subscriptions for the past five years

	2021	2022	2023	2024	2025
Number of Subscription	29,103,482	31,172,544	35,885,592	48,028,227	58,106,264

Table 10: Operators' download speed (Mbps) in measured service areas in the quarter ending March 2026

Measured service area	Airtel	Halotel	Yas	TTCL	Vodacom	Average
Arusha	24.3	17.7	32.7	27.3	33.8	27.18
Ilala	40.1	17.0	50.3	26.2	51.8	37.07
Kigamboni	31.0	15.2	39.3	19.3	41.6	29.26
Temeke	40.0	18.6	55.6	23.8	24.8	32.54
Kinondoni	39.3	21.8	67.2	16.2	52.4	39.38
Ubungo	35.6	18.8	53.8	19.9	48.3	35.30
Geita	34.8	23.7	33.8	26.6	47.3	33.24
Kagera	32.0	25.0	30.5	31.0	40.4	31.79
Kigoma	25.2	21.2	32.7	22.5	20.2	24.38
Kilimanjaro	24.6	18.9	51.6	25.4	26.6	29.44
Manyara	22.8	19.3	42.2	22.4	24.2	26.17
Mbeya	20.2	-	34.5	-	47.1	33.95
Pwani	29.6	22.4	40.4	24.0	22.3	27.72
Rukwa	26.5	22.7	33.4	24.5	16.7	24.76
Singida	22.7	21.1	44.2	26.2	27.4	28.32
Songwe	27.6	-	40.5	-	36.6	34.89
Tabora	23.9	22.9	38.6	24.2	21.4	26.21
Unguja	13.4	14.9	40.2	23.4	27.5	23.88
Industry Average						30.30

Table 11: Operators' latency (ms) in Measured Service Areas in the Quarter ending March 2026

Measured service area	Airtel	Halotel	Yas	TTCL	Vodacom	Average
Arusha	41.9	64.9	94.0	110.7	50.6	72.40
Ilala	39.2	57.4	70.4	96.7	35.7	59.85
Kigamboni	44.7	50.7	78.5	106.4	41.1	64.28
Temeke	41.9	68.5	74.9	102.6	42.8	66.12
Kinondoni	49.7	46.5	67.4	119.5	36.1	63.83
Ubungo	53.4	57.3	75.4	101.0	39.8	65.39
Geita	92.7	48.7	135.7	129.8	65.5	94.45
Kagera	59.9	55.3	113.8	116.7	52.7	79.64
Kigoma	71.6	68.5	142.9	151.4	60.3	98.93
Kilimanjaro	36.9	63.7	63.8	101.7	50.8	63.38
Manyara	49.1	47.0	92.9	105.3	50.4	68.94
Mbeya	62.9	-	97.5	-	48.0	69.47
Pwani	44.1	43.6	70.0	97.6	42.6	59.58
Rukwa	70.5	69.4	134.5	119.1	67.1	92.10
Singida	55.0	64.1	93.4	110.5	48.0	74.17
Songwe	58.3	-	92.7	-	48.2	66.42
Tabora	60.7	61.2	112.3	123.3	56.2	82.76
Unguja	72.0	70.1	43.8	96.5	53.0	67.07
Industry Average						**72.71**

Table 12: Operators' Network Availability (%) in measured Service Areas in the Quarter ending March 2026

Measured service area	Airtel	Halotel	Yas	TTCL	Vodacom	Average
Arusha	98.9	99.1	100.0	99.8	99.3	99.43
Ilala	100.0	100.0	100.0	100.0	100.0	100.00
Kigamboni	100.0	100.0	99.9	100.0	99.6	99.89
Kinondoni	99.5	99.9	99.9	99.9	99.7	99.78
Temeke	99.8	99.5	100.0	99.8	99.6	99.73
Ubungo	100.0	99.5	99.7	99.8	99.2	99.64
Iringa	100.0	100.0	100.0	100.0	99.5	99.89
Kilimanjaro	100.0	99.5	99.9	99.8	100.0	99.82
Mara	98.5	99.7	100.0	100.0	99.4	99.53
Mbeya	100.0	100.0	99.7	99.8	99.6	99.82
Morogoro	100.0	100.0	100.0	99.9	100.0	99.97
Mtwara	99.9	100.0	100.0	100.0	100.0	99.97
Mwanza	98.5	99.5	100.0	100.0	100.0	99.60
Njombe	98.2	100.0	100.0	100.0	99.8	99.59
Pemba	100.0	100.0	100.0	100.0	100.0	100.00
Shinyanga	99.6	99.8	99.9	99.9	99.4	99.72
Simiyu	98.5	99.7	100.0	99.9	99.1	99.43
Tanga	99.4	99.6	99.9	100.0	99.9	99.76
Unguja	100.0	100.0	100.0	100.0	100.0	100.00
Industry Average						**99.77**

Table 13: Mobile Money Service Subscriptions (Number of Accounts)

	Annualy				
	2021	2022	2023	2024	2025
No. of Subscriptions	35,285,767	40,953,496	52,875,129	63,207,569	76,466,691
No. of Transactions	3,752,084,894	4,195,899,414	5,273,086,154	3,737,202,434	6,306,767,827
	Quarter				
	June 2025	**September 2025**	**December 2025**	**March 2026**	
No. of Subscriptions	68,059,290	72,497,350	76,466,691	80,977,268	
No. of Transactions	1,392,683,175	1,694,032,906	1,853,717,380	1,991,494,385	

Chapter 02

Broadcasting Services

Broadcasting Services

This chapter provides an overview of key components within the broadcasting landscape, including Digital Terrestrial Television (DTT), Direct-to-Home (DTH) services, cable television, network coverage. During the period under review, there were 2.09 million decoders alongside 17,803 Cable Television subscriptions.

2.1. Decoders

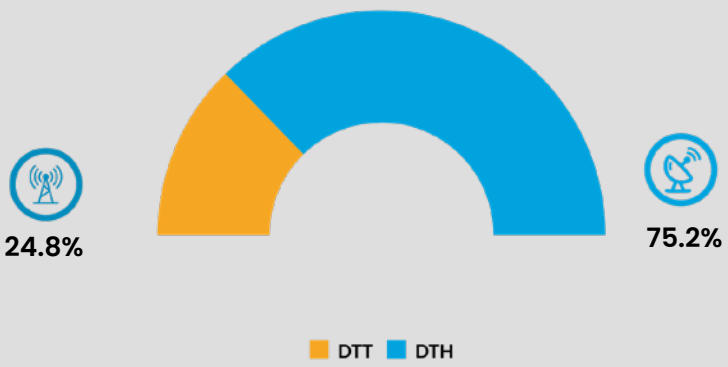
The number of decoders accessing television broadcasting services decreased by 1% during the reporting period, as shown in the summary below. Figure 2.1.1 shows a clear dominance of satellite-based services over terrestrial platforms. Direct-to-Home (DTH) accounts for 75.2 percent of total pay TV subscriptions, while Digital Terrestrial Television (DTT) represents 24.8 percent.

As of December 2025
2.11 Million

As of March 2026
2.09 Million

1%

Figure 2.1.1: Pay TV Subscription per technology



Additionally, among the five main operators, Azam media had the highest number of decoders, accounting for 71.1% of total subscriptions, followed by StarMedia Limited with 16.3%, as shown in Figure 2.1.2.

Figure 2.1.2: Share of Decoders per Operator as of March 2026

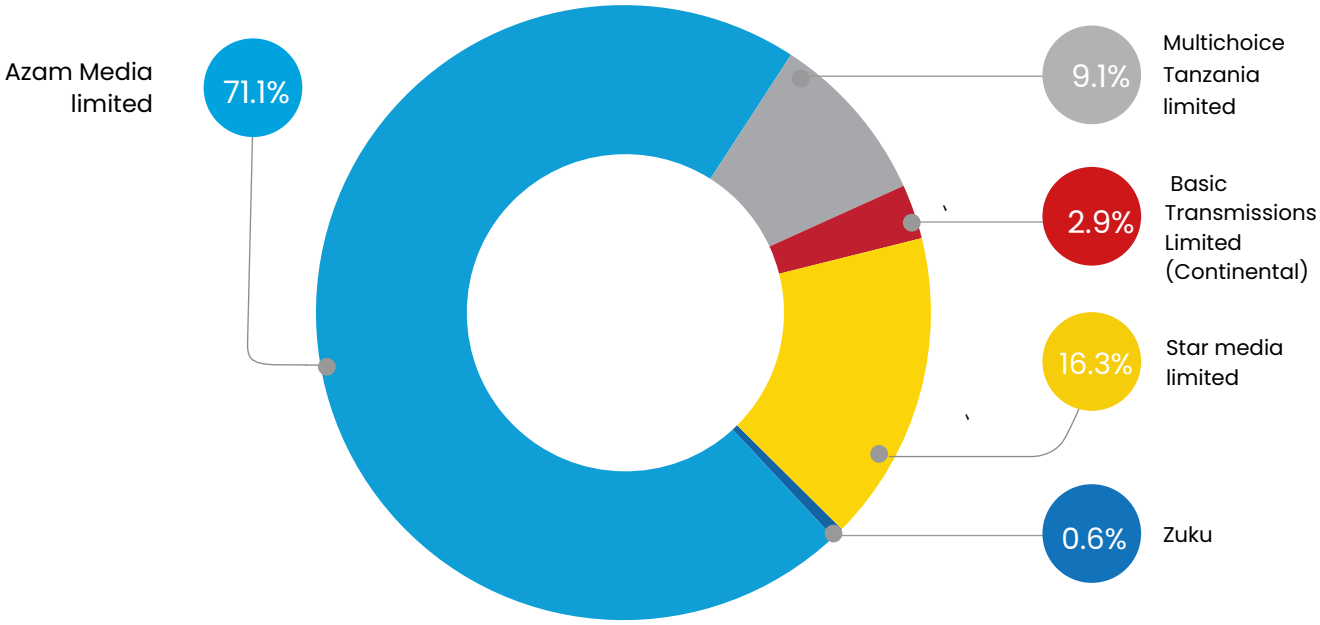
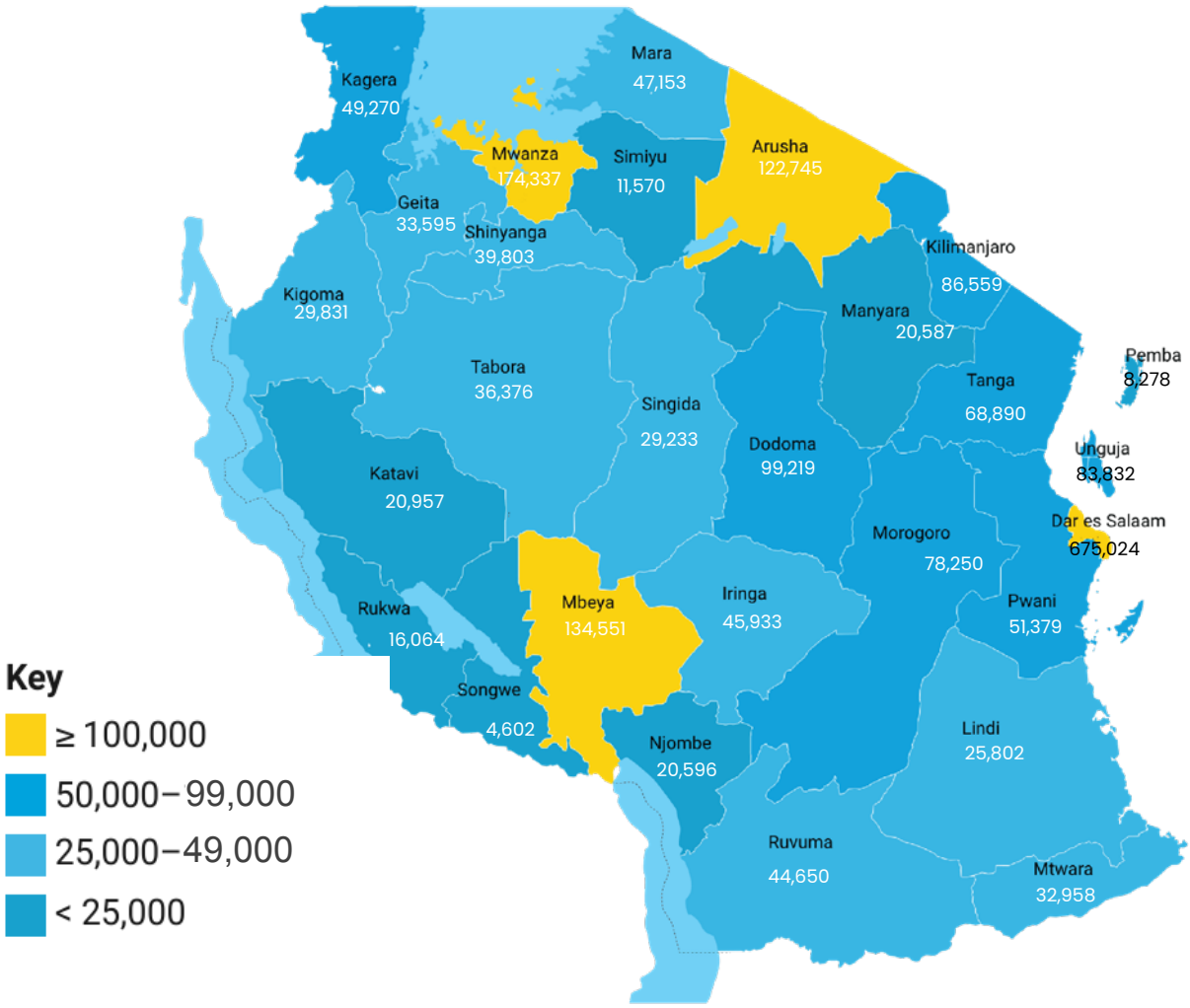


Table 2.1.1: Number of Decoders per Operator as of March 2026

Operator	DTT	DTH	Total
Azam Media Limited	327,734	1,160,235	1,487,969
Basic Transmissions Limited (Continental)	32,663	27,349	60,012
Multichoice Tanzania Limited (DStv)	N/A	189,651	189,651
Star Media Limited	157,981	183,546	341,527
Zuku	N/A	12,885	12,885
Total	518,378	1,573,666	2,092,044

The regional distribution of decoders indicates that most urban cities recorded the largest number of decoders, as shown in Figure 2.1.3. Dar es Salaam, Mwanza, Mbeya, and Arusha, contributed 52.9% of total decoders during the period under review. While the disparity in distribution highlights the concentration of broadcasting services in densely populated and commercially regions, it also underscores areas with potential for future growth.

Figure 2.1.3: Number of Decoders per Region



2.2. Cable TV Subscriptions

The number of cable TV subscriptions increased by 3% from 17,280 as of December 2025 to 17,803 as of March 2026, as shown in Figure 2.2.1. Regional distribution data further indicates that 59.2% of all Cable TV subscribers are in Shinyanga, Dar es Salaam,Tabora and Mwanza as illustrated in figure 2.2.2. Overall, there is an uneven uptake of Cable TV services across regions, influenced by consumer demand, as well as competitiveness of alternative broadcasting platforms.

Figure 2.2.1: Cable TV Subscriptions

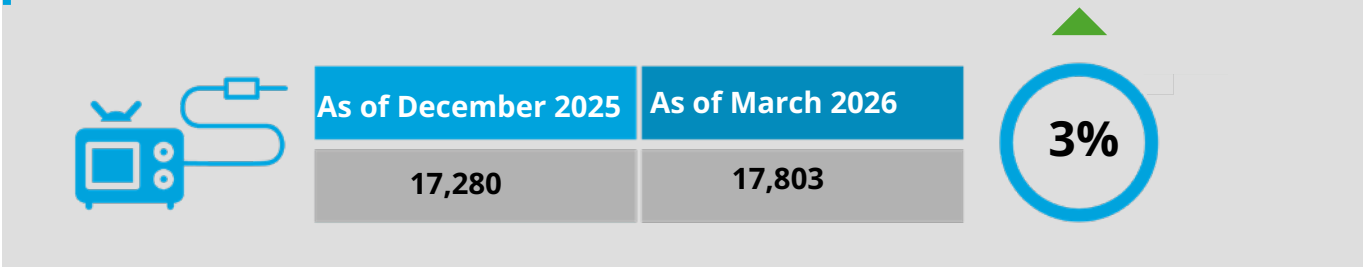
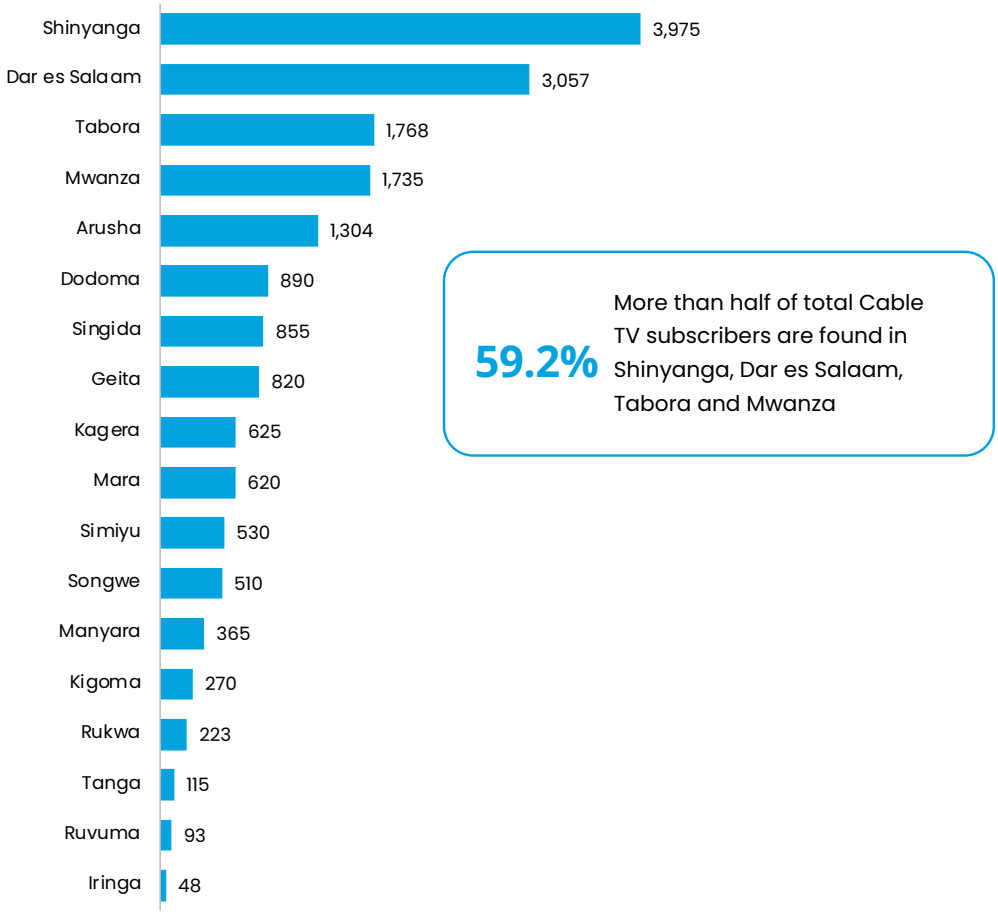


Figure 2.2.2: Number of Cable TV Subscriptions per Region



The Quarterly and annual trend for cable TV subscriptions are shown in Table 2.2.1 and 2.2.2.

Table 2.2.1: Quarterly Trend of Cable TV Subscription

	June 2025	September 2025	December 2025	March 2026
Subscriptions	17,657	16,957	17,280	17,803

Table 2.2.2: Trend of Cable TV subscriptions for the past five years

	2021	2022	2023	2024	2025
Subscriptions	17,657	16,957	17,280	16,767	17,280

2.3. Coverage of Broadcasting Network

The broadcasting signal coverage shown in Table 2.3.1 highlights significant disparities among DTT, DTH, and FM broadcasting technologies. DTH provides complete coverage geographically and in terms of population, serving as a critical infrastructure for reaching remote areas.

Table 2.3.1. Broadcasting Signal Coverage as of March 2026

Indicator	December 2025	March 2026
Percentage of the population covered by DTT signal	58.00%	58.00%
Percentage of the population covered by DTH signal	100.00%	100.00%
Percentage of the population covered by FM broadcasting signal	83.94%	85.31%
Percentage of the geography covered by DTT signal	33.00%	33.00%
Percentage of the geography covered by DTH signal	100.00%	100.00%
Percentage of the geography covered by FM broadcasting signal	59.15%	62.19%

2.4. Compliance Indicators

Content monitoring was carried out for National Broadcasters (Television and Radio) from January to March 2026 as specified in the Electronic and Postal Communications (Quality of Service) Regulations, 2025. To achieve this, National Broadcasters are required to provide schedules (timing, order, and duration) and adhere to the programs submitted.

2.4. 1. Program line up Submission and its Adherence

During the period under review, 63% of Television channels complied with the requirement to submit their program line-up. However, only 44% adhered to the schedules they had submitted, as indicated in Table 2.4.1.1. On the other hand, 75% of Radio channels were compliant with submission of the program line-ups, and 75% had adhered to the schedules submitted, as shown in Table 2.4.1.2.

Table 2.4.1.1: Television Program line up Submission and Adherence to News for the Quarter ending March 2026

Television name	Program Line Up Submission	Adherence to Program Line-Up Submitted
ITV	Compliant	Compliant
UTV	Compliant	Non-Compliant
Tumaini TV	Compliant	Compliant
Channel Ten Television	Non-Compliant	Non-Compliant
East Africa TV	Compliant	Compliant
Star TV Tanzania	Non-Compliant	Non-Compliant
TBC 1	Compliant	Compliant
TV Imaan	Compliant	Compliant
Arise and Shine TV	Compliant	Non-Compliant
WRM TV	Non-Compliant	Non-Compliant
Clouds TV	Compliant	Compliant
Hope Channel Tanzania	Compliant	Compliant
Upendo TV	Compliant	Non-Compliant
Mahaasin TV	Compliant	Non-Compliant
Channel Ten Plus	Non-Compliant	Non-Compliant
TVE	Non-Compliant	Non-Compliant

Table 2.4.1.2: Radio Program Line up Submission and Adherence for the Quarter ending March 2026

Indicator	Program Line Up Submission	Adherence to Program Line-Up Submitted
Radio One	Compliant	Compliant
TBC Taifa	Compliant	Compliant
Adventist World Radio (AWR)	Compliant	Compliant
Clouds FM	Non-compliant	Non-compliant
East Africa Radio	Compliant	Compliant
EFM	Compliant	Compliant
Wasafi FM	Non-compliant	Non-compliant
Magic FM	Non-compliant	Non-compliant
TBC International	Compliant	Compliant
Radio Free Africa	Compliant	Compliant
Bongo FM	Compliant	Compliant
Radio Maria	Compliant	Compliant

2.4. 2. Program Diversity, Content of Educational in Nature and Adherence to News Presentation Requirements

National broadcasters are required to broadcast a broad range of content that ensures diversity in information, education, and entertainment programs, to cater for different tastes, cultures, and interests of the Tanzanians audience

During the period under review, 81% of television channels demonstrated strong program diversity, and the majority complied with the requirement to broadcast 90 minutes of news content and educational content, as shown in Table 2.4.2.1. In contrast, 92% of radio channels complied with program diversity and educational content, and adhered to the 90-minute news broadcasting requirement, as illustrated in Table 2.4.2.2.

Table 2.4.2.1: Television program Diversity for the Quarter ending March 2026

Television name	Program diversity	Content of Education Nature	Adherence to 90 minutes for News
ITV	Compliant	Compliant	Compliant
UTV	Compliant	Compliant	Compliant
Tumaini TV	Compliant	Compliant	Compliant
Channel Ten Television	Compliant	Compliant	Compliant
East Africa TV	Compliant	Compliant	Compliant
Star TV Tanzania	Compliant	Compliant	Compliant
TBC 1	Compliant	Compliant	Compliant
TV Imaan	Compliant	Compliant	Non-Compliant
Arise and Shine TV	Non-Compliant	Non-Compliant	Non-Compliant
WRM TV	Non-Compliant	Non-Compliant	Compliant
Clouds TV	Compliant	Compliant	Compliant
Hope Channel Tanzania	Compliant	Compliant	Non-Compliant
Upendo TV	Compliant	Compliant	Non-Compliant
Mahaasin TV	Compliant	Compliant	Compliant
Channel Ten Plus	Compliant	Compliant	Compliant
TVE	Non-Compliant	Non-Compliant	Compliant

Table 2.4.2.2: Radio Program Diversity for the quarter ending March 2026

Radio Name	Program Diversity	Content of Education Nature	Adherence to 90 minutes for News
Radio One	Compliant	Compliant	Compliant
TBC Taifa	Compliant	Compliant	Compliant
Adventist World Radio (AWR)	Compliant	Compliant	Compliant
Clouds FM	Compliant	Compliant	Compliant
East Africa Radio	Compliant	Compliant	Compliant
EFM	Compliant	Compliant	Compliant
Wasafi FM	Non-compliant	Non-compliant	Non-compliant
Magic FM	Compliant	Compliant	Compliant
TBC International	Compliant	Compliant	Compliant
Radio Free Africa	Compliant	Compliant	Compliant
Bongo FM	Compliant	Compliant	Compliant
Radio Maria	Compliant	Compliant	Compliant

2.4.3. Adherence to Local Content Requirements

National broadcasters are required to ensure that 60% of aired content is locally produced, reflecting the culture, language, and interests of the local audience. During the period under review, all television broadcasters complied with this requirement, as presented in Table 2.4.3.1. Radio stations exhibited full compliance, consistently adhering to the local content requirement, as shown in Table 2.4.3.2

Table 2.4.3.1: Television Adherence to Local Content Requirement for the Quarter ending March 2026

Television name	Relevance to society	Language (Kiswahili or English)	60% local content production	80% Tanzanian music
TV	Compliant	Compliant	Compliant	Compliant
UTV	Compliant	Compliant	Compliant	Compliant
Tumaini TV	Compliant	Compliant	Compliant	Compliant
Channel Ten Television	Compliant	Compliant	Compliant	Compliant
East Africa TV	Compliant	Compliant	Compliant	Compliant
Star TV Tanzania	Compliant	Compliant	Compliant	Compliant
TBC 1	Compliant	Compliant	Compliant	Compliant
TV Imaan	Compliant	Compliant	Compliant	Compliant
Arise and Shine TV	Compliant	Compliant	Compliant	Compliant
WRM TV	Compliant	Compliant	Compliant	Compliant
Clouds TV	Compliant	Compliant	Compliant	Compliant
Hope Channel Tanzania	Compliant	Compliant	Compliant	Compliant
Upendo TV	Compliant	Compliant	Compliant	Compliant
Mahaasin TV	Compliant	Compliant	Compliant	Compliant
Channel Ten Plus	Compliant	Compliant	Compliant	Compliant
TVE	Compliant	Compliant	Compliant	Compliant

Table 2.4.3.2: Radio Adherence to Local Content for the Quarter ending March 2026

Radio Name	Relevance to society	Content of Education Nature	60% local content production	80% Tanzanian Music
Radio One	Compliant	Compliant	Compliant	Compliant
TBC Taifa	Compliant	Compliant	Compliant	Compliant
Adventist World Radio (AWR)	Compliant	Compliant	Compliant	Compliant
Clouds FM	Compliant	Compliant	Compliant	Compliant
East Africa Radio	Compliant	Compliant	Compliant	Compliant
EFM	Compliant	Compliant	Compliant	Compliant
Wasafi FM	Compliant	Compliant	Compliant	Compliant
Magic FM	Compliant	Compliant	Compliant	Compliant
TBC International	Compliant	Compliant	Compliant	Compliant
Radio Free Africa	Compliant	Compliant	Compliant	Compliant
Bongo FM	Compliant	Compliant	Compliant	Compliant
Radio Maria	Compliant	Compliant	Compliant	Compliant

2.5 Broadcasting Service Licences

There were 708 active licenses issued in Broadcasting subsector as of March 2026 as shown in table 2.5.1.

Table 2.5.1: Number of Broadcasting Service Licences

Category	Number of licenses	
	December 2025	**March 2026**
National Content Television (FTA) Licences	21	21
District Content Television (FTA) Licences	21	21
National Content Radio Licences	14	14
Regional Content Radio Licences	37	37
District Content Radio Licences	188	195
Community Radios	19	20
National Special Content Television	1	1
National Content Televisions by Subscription	30	30
District Content Televisions by Subscription	1	1
National Content Broadcasting (Authority To Broadcast)-Channel Aggregators (Network Facility Licensee and Multiplex)	1	1
National Content (support services)	3	3
Online Content Aggregators	6	6
Weblogs (Blogs)	77	74
Online Radios	13	12
Online Televisions	222	221
Cable Televisions	55	51

Chapter 03

Postal and Courier Services

Postal & Courier Services

This section presents an overview of postal and courier services in Tanzania, focusing on customer engagement and the volume of items such as letter mail, parcels posted and delivered across the network. During the quarter ending March 2026, a total of 579,209 items were posted and 952,314 were delivered.

3.1. Letter Boxes and Private Bags

Tanzania Posts Corporation (TPC) provides basic postal services of letter boxes and private bags to private individuals and corporate customers. During the period from January to March 2026, there was no change in the number of letter boxes and private bags as shown in Table 3.1.1.

Table 3.1.1: TPC Letter Boxes and Private Bags in the Quarter ending March 2026

Month	No. of Letter Boxes	No. of Private Bags	Total
January	155,334	67	155,401
February	155,334	67	155,401
March	**155,334**	**67**	**155,401**

3.2. Courier Customers

The courier customers are categorised as corporate and individual customers as shown in table 3.2.1.

Table 3.2.1: Courier Customers

	Corporate Customers	Individual Customers	Total
January	1,016	72,675	73,691
February	854	89,290	90,144
March	**1,010**	**67,017**	**68,027**

3.3. Posted Items

3.3.1. Domestic Posted Items

During the quarter ending March 2026, the number of domestic posted items decreased by 1.4% from 554,261 items during the quarter ending December 2025 to 546,644 items in the quarter ending March 2026, as shown in figure 3.3.1.1 and table 3.3.1.1. Of the total items posted, TPC accounted for 48% (226,480 items), and other courier operators accounted for 52% (284,164 items), as illustrated in figure 3.3.1.2.

Figure 3.3.1.1 Domestic Posted Items

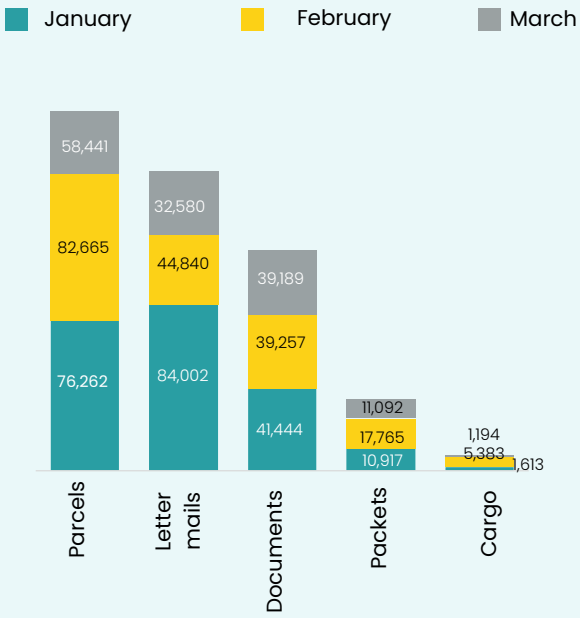
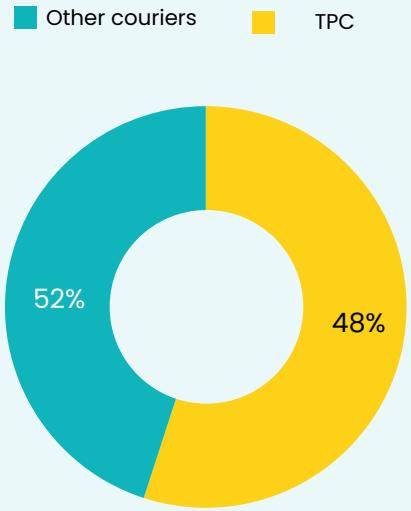


Figure 3.3.1.2 Domestic Posted Market Share



During the period under review, parcels constituted the largest category of domestic posted items by 39.8%, followed by letter mail (29.5%), documents (21.9%), packets (7.3%) and cargo (1.5%)

Table 3.3.1.1: Domestic Posted Items for the Quarter ending March 2026

Month	Letter Mails	Parcels	Packets	Documents	Cargo	Total
January	84,002	76,262	10,917	41,444	1,613	214,238
February	44,840	82,665	17,765	39,257	5,383	189,910
March	32,580	58,441	11,092	39,189	1,194	142,496
Total	161,422	217,368	39,774	119,890	8,190	546,644

3.3.2. International Posted Items

During the quarter ending March 2026, the number of international posted items increased by 18.5% from 30,065 items in the quarter ending December 2025 to 32,565 in the quarter ending March 2026, as shown in figure 3.3.2.1 and Table 3.3.2.1. Additionally, TPC accounted for the majority of international posted items (31,189 items), representing 95.8% of the total posted items, while other courier operators accounted for a small share of 1,376 items, representing 4.2% of the total posted items. The market share for international posted items is shown in Figure 3.3.2.2

Figure 3.3.2.1: International Posted Items

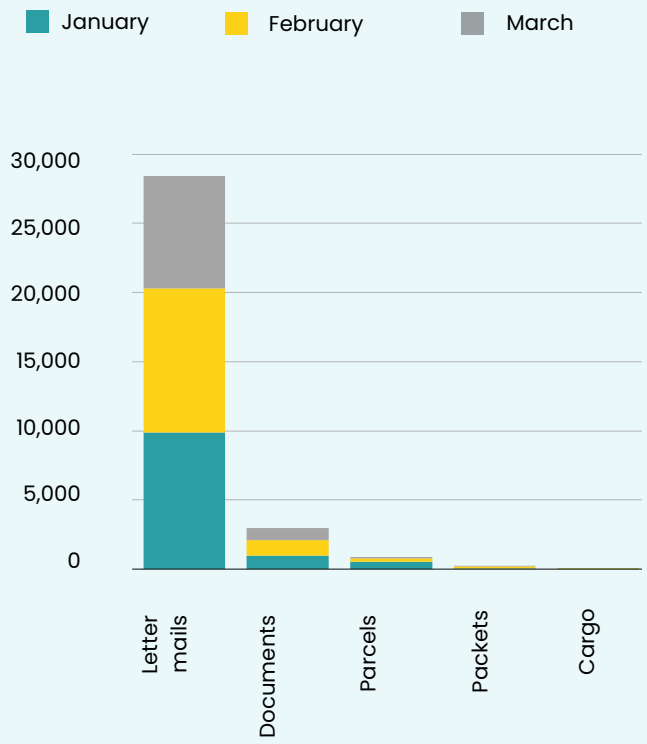


Figure 3.3.2.2: International Posted Items Market Share

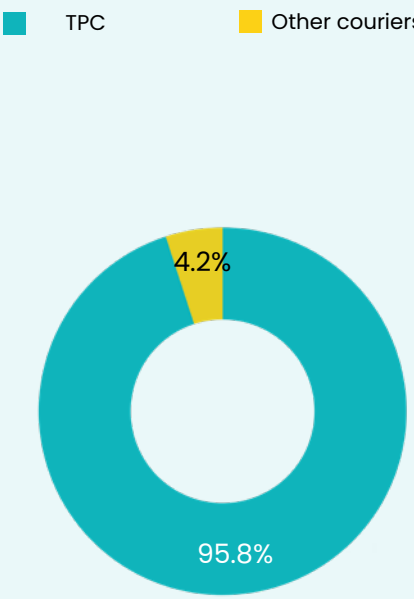


Table 3.3.2.1: Number of International Posted Items per Operator

Operator	Oct to Dec 2025	Jan to Mar 2026
TPC	27,877	31,189
Other Couriers	2,188	1,376
Total	30,065	32,565

Table 3.3.2.2: Number of International Posted Items

Month	Letter Mails	Parcels	Packets	Documents	Cargo	Total
January	9,908	563	77	989	17	11,554
February	10,394	207	121	1,118	7	11,847
March	8,120	137	30	877	0	9,164
Total	28,422	907	228	2,984	24	32,565

3.4. Delivered items

3.4.1 Domestic Delivered Items

During the quarter ending March 2026, the number of domestic delivered items increased by 11.5% from 814,062 items in quarter ending December to 907,759 items. Domestic delivered items are shown in figure 3.4.1.1 and table 3.4.1.1.

Figure 3.4.1.1 Domestic Delivered Items (in '000)

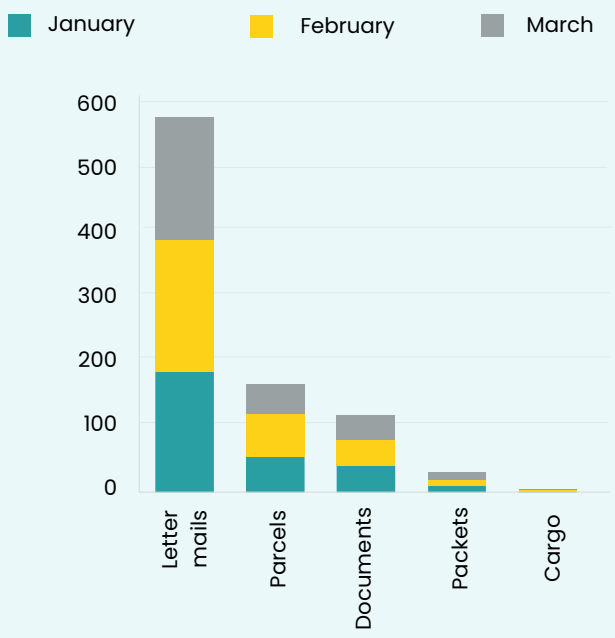


Table 3.4.1.1: Domestic Delivered Items

Month	Letter Mails	Parcels	Packets	Documents	Cargo	Total
January	183,119	54,779	10,522	40,617	1,426	290,463
February	199,412	70,173	16,415	41,026	3,936	330,962
March	184,183	50,870	11,125	39,191	965	286,334
Total	566,714	175,822	38,062	120,834	6,327	907,759

3.4.2. International Delivered Items

During the quarter ending March 2026, the number of international delivered items decreased by 3.9% from 46,362 items in the quarter ending December 2025 to 44,555 in the quarter ending March 2026, as shown in Table 3.4.2.1. Additionally, TPC accounted for the majority of international delivered items (41,524 items), representing 93.2% of the total delivered items, while other courier operators accounted for small share of 3,031 items, representing 6.8% of the total delivered items. The market share for international delivered items is shown in Figure 3.4.2.1. Table 3.4.2.2 and figure 3.4.2.2 indicates that letter mails constituted the largest category of international delivered items during the quarter by 62.4%, followed by packets (22.8%), parcels (8.7%) and documents (4.2%) while postal cargo remained minimal.

Table 3.4.2.1: International Delivered Items for the Quarter ending March 2026

Operator	Oct-Dec 2025	Jan-Mar 2026
TPC	44,069	41,524
Other Couriers	2,293	3,031
Total	46,362	44,555

Figure 3.4.2.1 International delivered Items Market Share

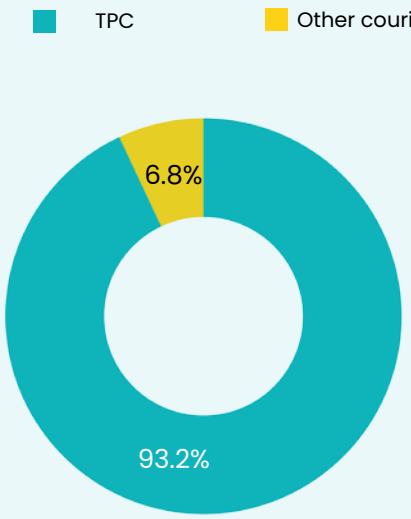


Figure 3.4.2.2 International delivered items

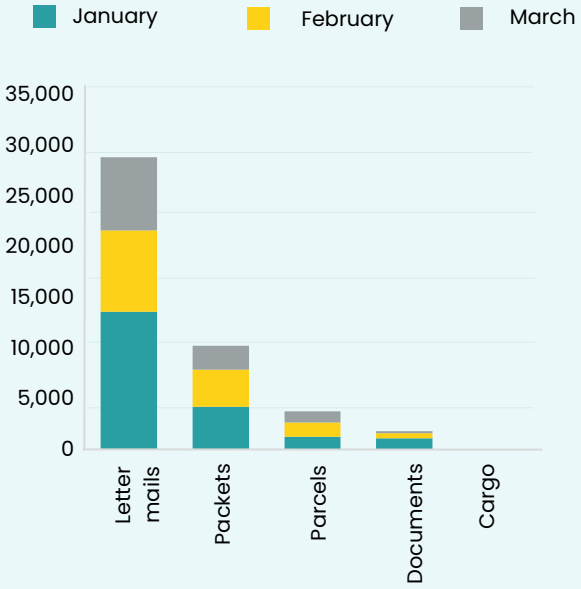


Table 3.4.2.2: International Delivered Items for the Quarter ending March 2026

Month	Letter Mails	Parcels	Packets	Documents	Cargo	Total
January	13,507	1,305	4,211	1,144	21	20,188
February	7,940	1,455	3,662	515	15	13,587
March	7,160	1,108	2,304	208	-	10,780
Total	28,607	3,868	10,177	1,867	36	44,555

3.5. Quality of Service (QoS)

During the quarter ending March 2026, Quality of Service (QoS) tests were conducted in accordance with the Electronic and Postal Communications (Quality of Service) Regulations, 2025, to assess compliance with delivery time standards for domestic courier services.

Inter-Town Zone A requires at least 90% of items to be delivered within one day (D+1), only 90% of the operators complied. On the other hand, 74% of operators complied with the requirement of Inter-Town Zones B and C of delivering at least 90% of items within two days (D+2), as presented in Tables 3.5.1 and 3.5.2.

Table 3.5.1: QoS indicator – Speed of Delivery for Inter-Town Zone A target: Day+1(90%)

Licensee name	Compliance status
Blaze Concierge And Courier Services Limited	Compliant
M/S Azam Marine Company Limited	Compliant
H&N Courier Express Limited	Compliant
Aifola Express	Compliant
Epvate & Fortune International Consulting Limited	Compliant
Sga Cash In Transit (T) Limited	Compliant
Urban Eagle	Compliant
Precision Air Services Plc	Compliant
Kapilla Group Limited	Compliant
Dorah Ndondi	Compliant
Marathon Logistics Limited	Compliant
Kimua Company Limited	Compliant
Citysprint Fulfilment Center Tanzania Limited	Compliant
Geamos Company Limited	Compliant
Abc Upper Class & Transportation Limited	Compliant
Mwananchi Communications Limited	Compliant
Ndengaro Company Limited	Compliant
Dhl Tanzania Limited	Compliant
Tutume Worldwide Limited	Not Compliant
Simba Logistic Equipment Supply Co. Ltd	Not Compliant

Table 3.5.2: QoS indicator – Speed of Delivery for Inter-Town Zone B and C target: Day +2 (90%)

Licensee name	Compliance status
Geamos Company Limited	Compliant
Blaze Concierge And Courier Services Limited	Compliant
H&N Courier Express Limited	Compliant
Mwananchi Communications Limited	Compliant
Aifola Express	Compliant
Sga Cash In Transit (T) Limited	Compliant
Precision Air Services Plc	Compliant
Dorah Ndondi	Compliant
Kapilla Group Limited	Compliant
Abc Upper Class & Transportation Limited	Compliant
Gateway Global Freight Limited	Compliant
Kimua Company Limited	Compliant
Marathon Logistics Limited	Compliant
Citysprint Fulfilment Center Tanzania Limited	Compliant
Ndengaro Company Limited	Not Compliant
Silvus Company Limited	Not Compliant
Dhl Tanzania Limited	Not Compliant
Tutume Worldwide Limited	Not Compliant
Simba Logistic Equipment Supply Co. Ltd	Not Compliant

TCRA has taken and will continue to take regulatory measures to all licencees who fail to comply with QoS parameters as provided in the Electronic and Postal Communications (Quality of Service) Regulations, 2025.

3.6. Postal and Courier Service Licences

There were 144 active licenses issued in postal and courier subsector as of March 2026 as shown in table 3.6.1.

Table 3.6.1: Number of Postal and Courier Service Licences

Category	Number of licenses	
	December 2025	March 2026
International Courier	6	5
Intercity Transporters	62	56
Intracity Courier	11	8
Domestic Courier	69	74
Public Postal	1	1

Conclusion

The communications sector continued to record notable growth during the quarter ending March 2026, emphasizing its role in advancing in the country's digital transformation and socio-economic development. The expansion of communication infrastructure and availability of Broadband internet services supports Tanzania's broader digital economy by enabling fintech, and IoT innovation, accelerating e-commerce adoption, and strengthening digital government service delivery making the continued growth of the communications sector inseparable from the broader ambitions of TDV-2050.

In telecommunications and internet services, there was a sustained increase in subscriptions, mobile money usage, and data consumption driven by expanding broadband infrastructure and wider adoption of smart devices. Subscriptions and data usage rose by 4.6% and 15.3% compared to the previous quarter. Broadband population coverage expanded to 94.32% for 4G and 32.83% for 5G stregthened access to high speed internet services and established a solid foundation for the country's participation in the digital economy. Internet subscriptions also increased by 1.5%, reaching 58.9 million, which led to increase in number of registered domain names to 38,409 for the quarter ending March 2026. Mobile money services continued to grow where by subscriptions increased by 10.6 percent hence facilitating financial inclusion.

The broadcasting sector plays a major role in informing the public, promoting culture, and strengthening national unity. The population coverage by DTT remained the same at 58% and FM signals increased to 85.31% in the quarter ending March 2026. On the other hand, the number of pay-TV decoders declined by 1%, reaching 2.09 million during the period under review.

Similarly, postal and courier services continued to evolve in response to digitalization and e-commerce expansion. TPC maintained its central role in providing essential postal services handling domestic posted items. The sector played a key role in connecting individuals and businesses, particularly in remote areas, through efficient mail, parcel, and logistics services.

Overall, the quarter's performance reaffirms the strong momentum toward a more connected, inclusive, and digitally empowered Tanzania. TCRA remains committed to facilitating an enabling environment that supports infrastructure investment, innovation, and the sustainable growth of the communications ecosystem in line with national development priorities, strategies and the vision of a digital economy.

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