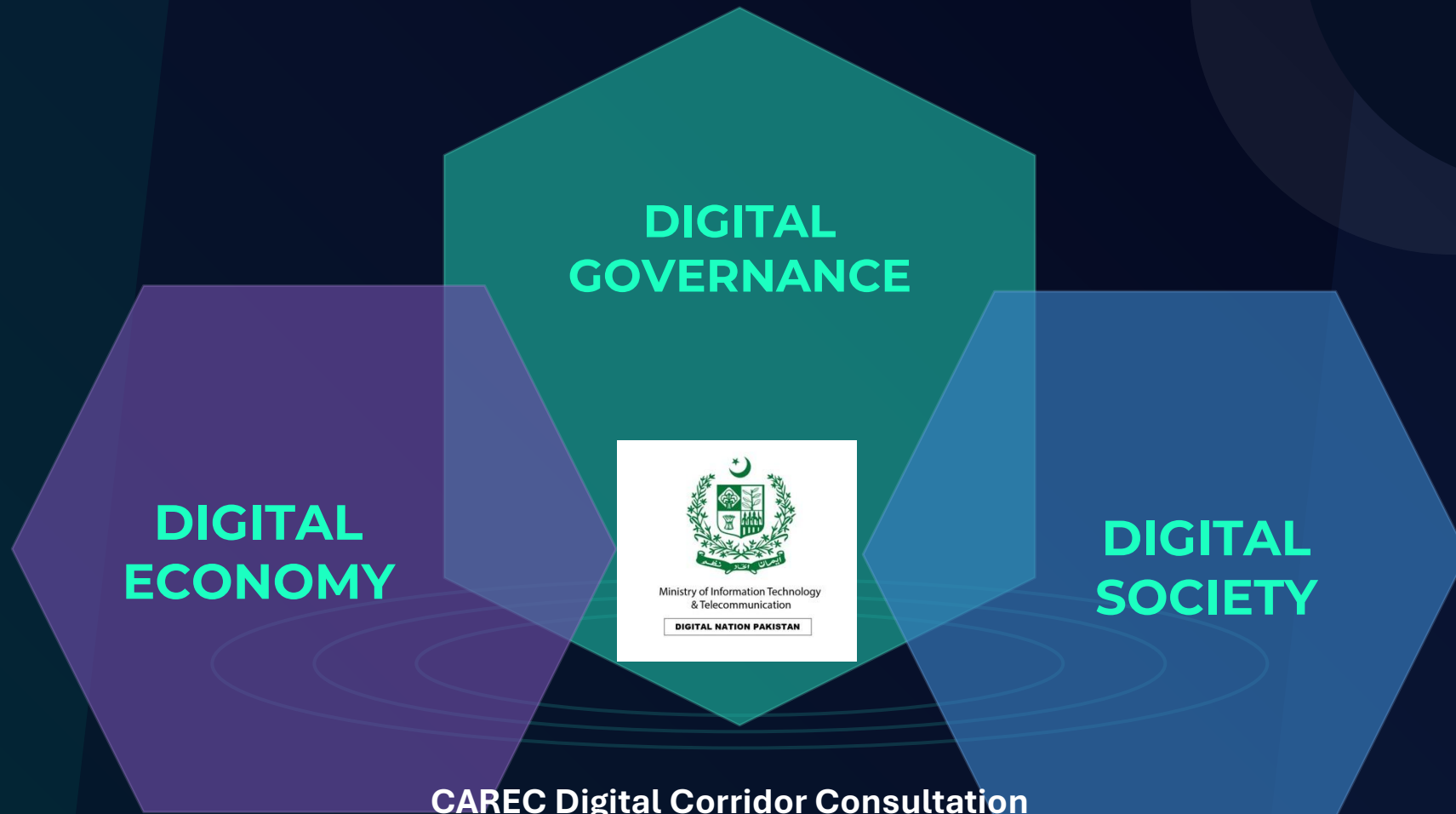


Pakistan's Digital Landscape





Governance Overview



Ministry of Information Technology & Telecommunication

DIGITAL NATION PAKISTAN

Policies



Telecom Policy
MVNO Policy
Spectrum Policy

Cyber Security Policy

Cloud First Policy

AI Policy

Major Milestones

IMT Spectrum Auction

Abolishment of ROW Fee

Wi-Fi 6E Spectrum Allocation

DTx PM Ramazan Relief

PM Cashless Initiative

Up-Coming Policies

Digital Master Plan

Satellite Services Licensing

National Fiberization Policy

Pakistan Telecom Re-organization Act

Digital Nation Pakistan Act,

Electronic Transactions Ordinance

Sector Regulator, Policy Implementation, Certifications



Pakistan Digital Authority



Public Sector Companies



Telecom Operators (Fixed & Wireless, LDI, Infrastructure etc.)



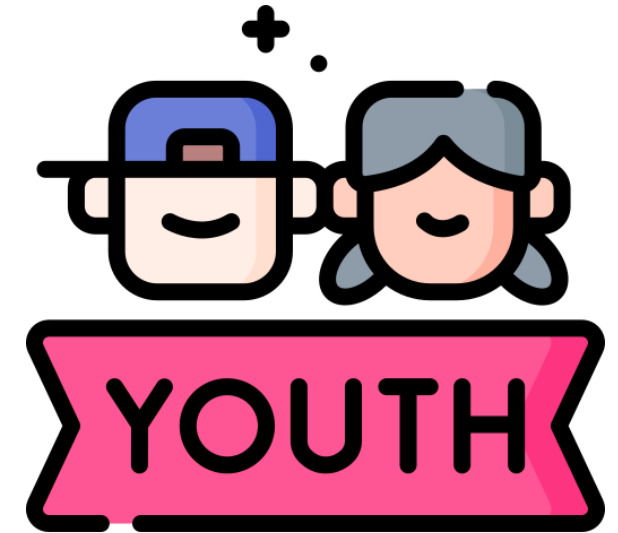
Pakistan's Digital Landscape



241 Million Population



≤ 34
Yrs



70% Young Population

Pakistan's Digital Landscape



70+ million Social Media users

72%

Smartphone
Penetration



33%

Social Media



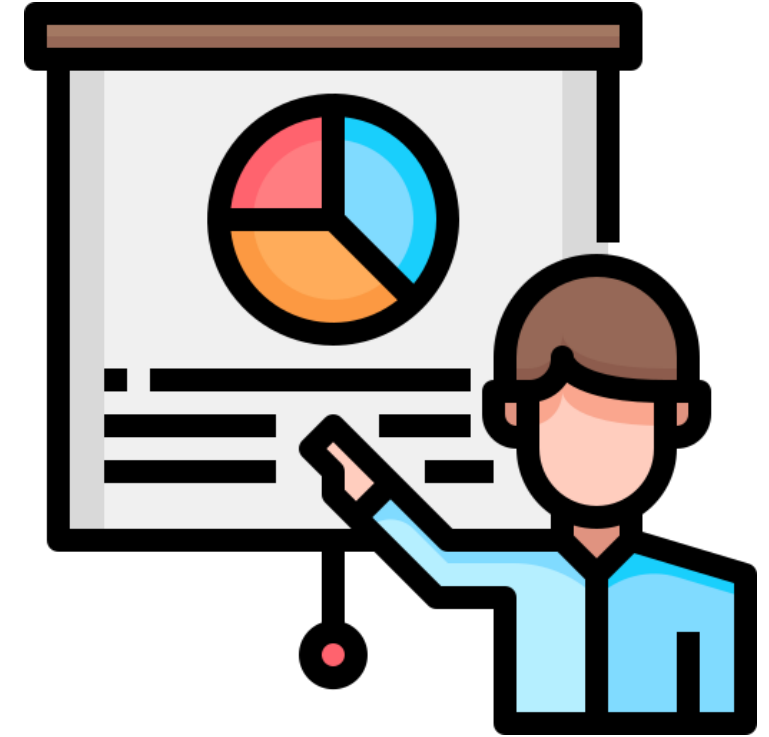
Internet gender gap in Pakistan
reduced from 25% down to 8% in
2025

Pakistan's Digital Landscape



~20%

Growth in IT export



USD 4.6 Billion Export in 2025-26

- 26K + IT-enables companies
- 100+ STPs & IT Parks
- 17 Special Technology Zones
- 250 + Innovation Hubs

Pakistan's Digital Landscape

33.6 Bn

Revenue Generated

**National
Incubation
Center**



9 x NICs Nationwide

185 k

Jobs Created

13,000 Startup operating
through NICs

Pakistan's Digital Landscape



208 Million Cellular Subscribers

83%

Teledensity



65%

Broadband
Penetration



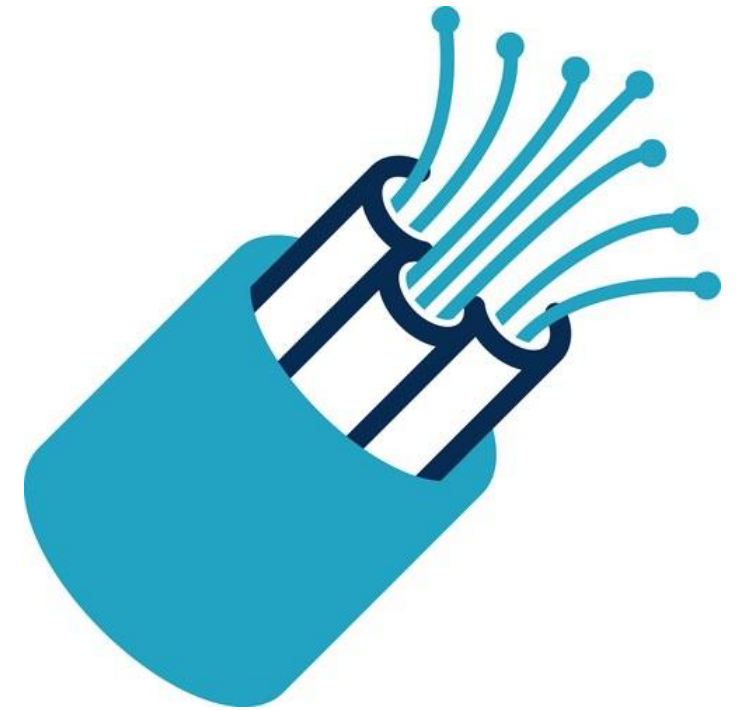
164 Million Broadband connections

Pakistan's Digital Landscape



1st AI Ready Data Center

20+
Data Centers



234,000+ km of fiber-optic
infrastructure

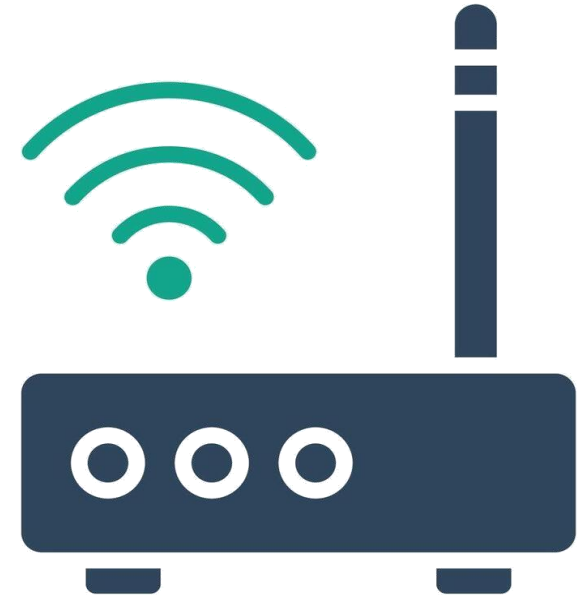
Pakistan's Digital Landscape

18%

Tower Fiberization



5.1 Million House Passes

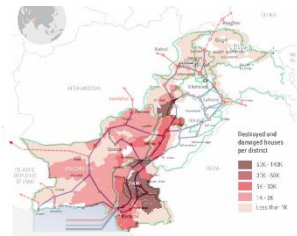


2.7 Million FTTH Subscribers

Digital Connectivity Contribution



Investment of \$5+ Billion*



Local Smartphone Manufacturing



40,000
Jobs



65+ Million Manufacturing
Capacity



Rural Connectivity (USF) – Last 5 years



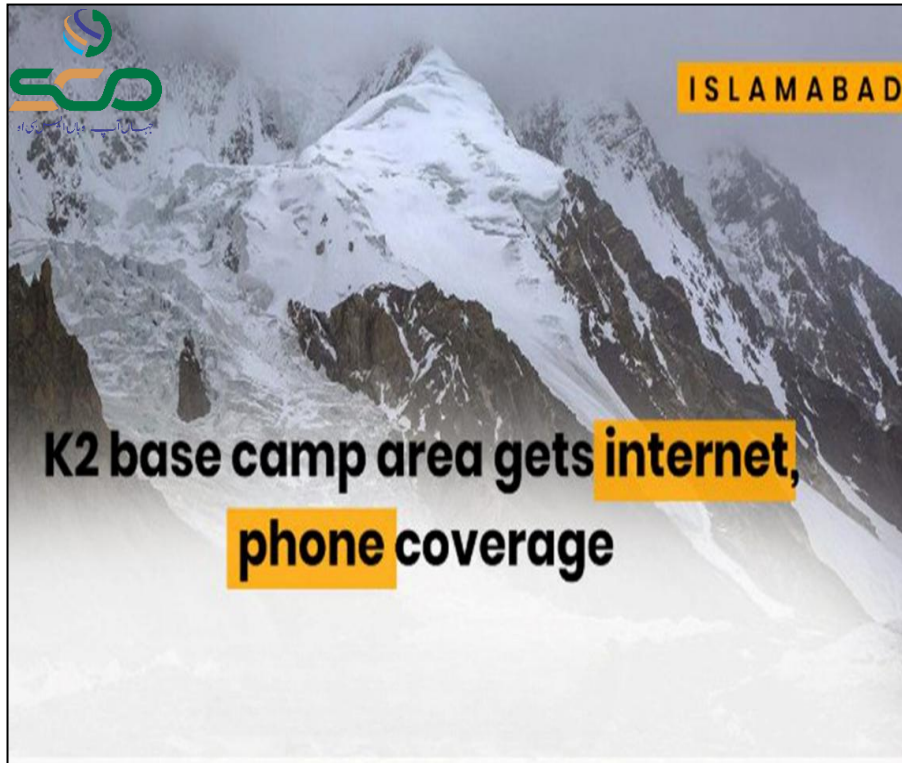
10,000+ KM Fiber connecting
925 Towns/UCs

92
Projects



3000+ Telecom Towers
connecting 14300+ Mauzas

Connectivity in AJ&K and GB (SCO) – Last 5 years



4G BTS has been installed
at K2 Base

518

Cellular Sites



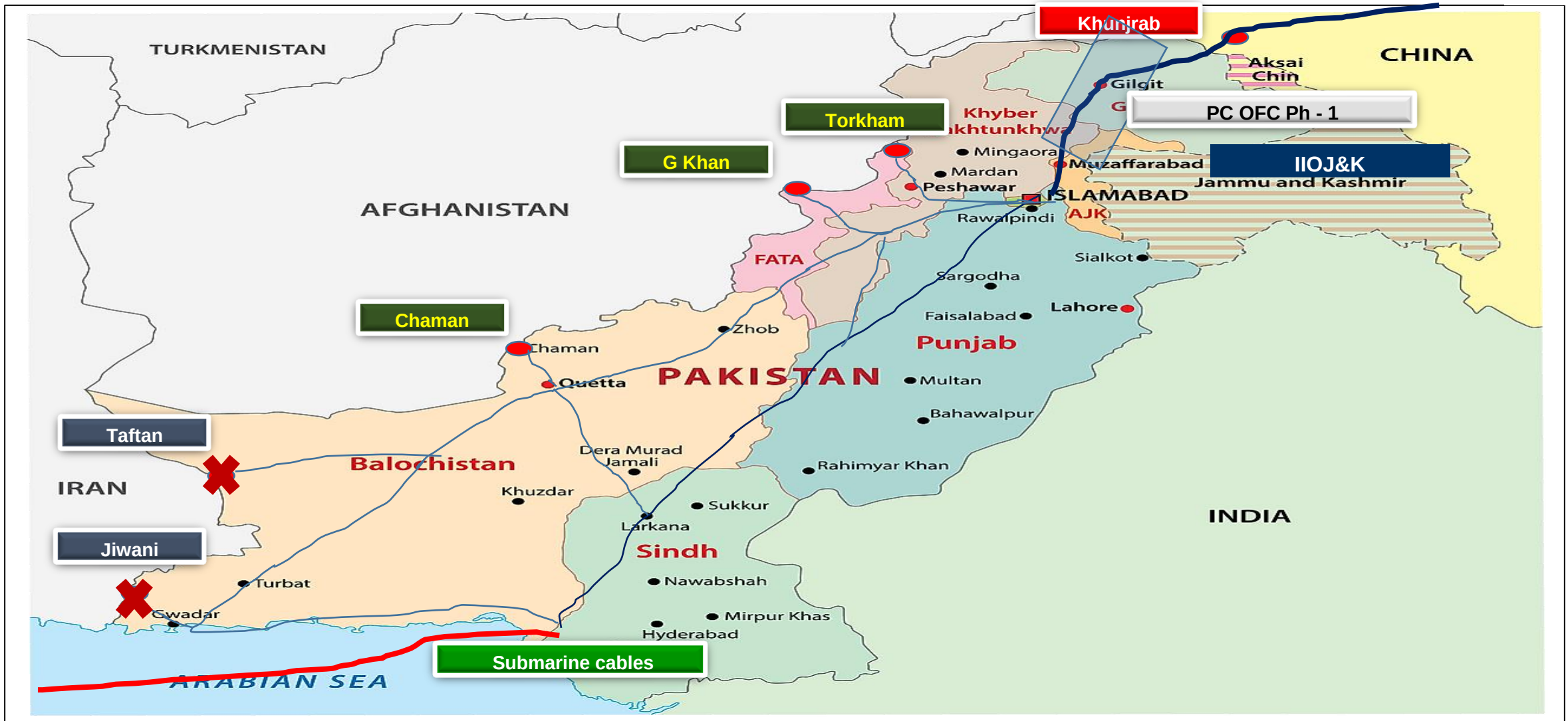
12.1 Mn

Population covered



154 sites with 8000 KMs of OFC laid

Pakistan's International Connectivity

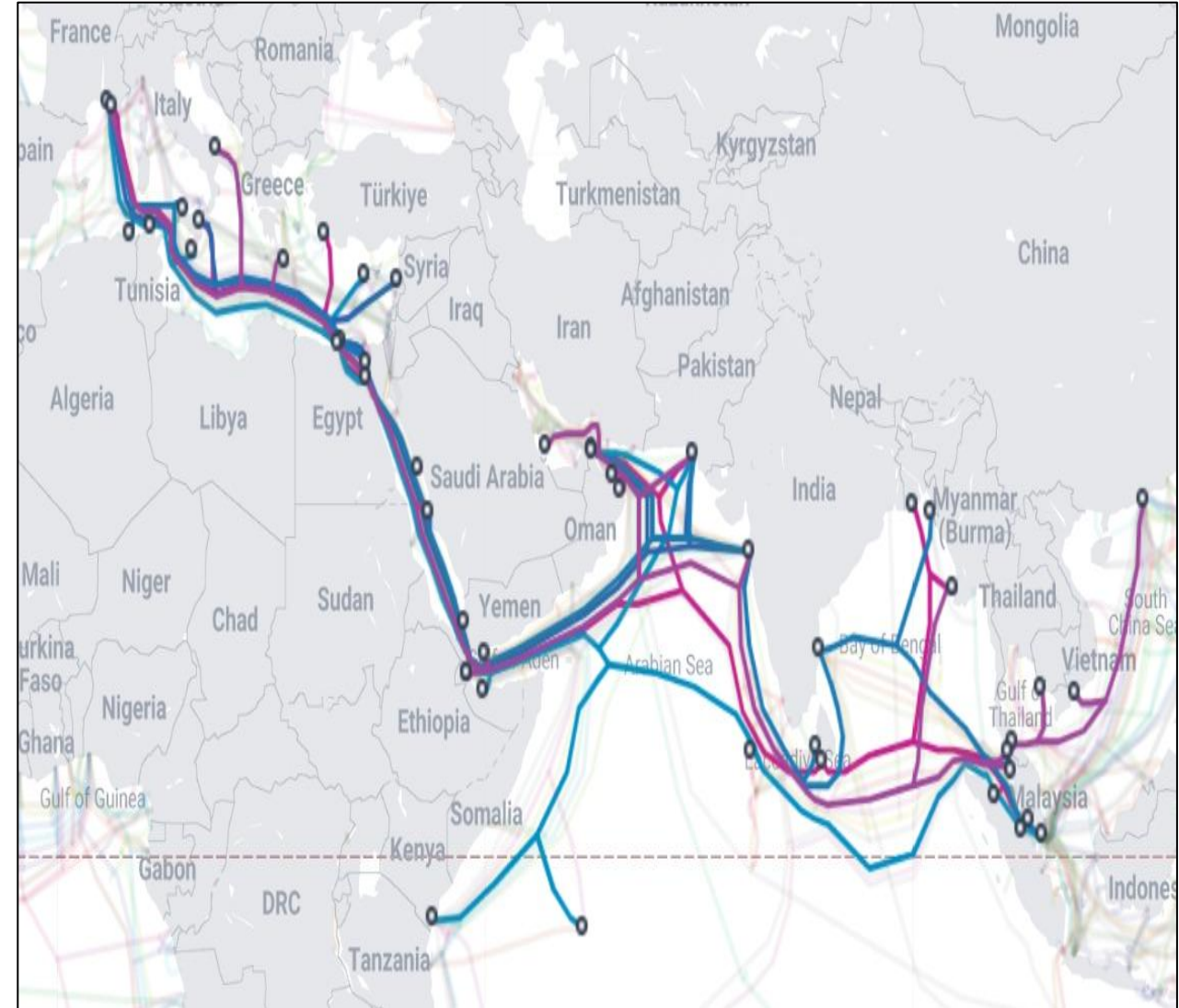


China (Khunjerab)

Afghanistan (Torkham, Chaman, Ghulam Khan)

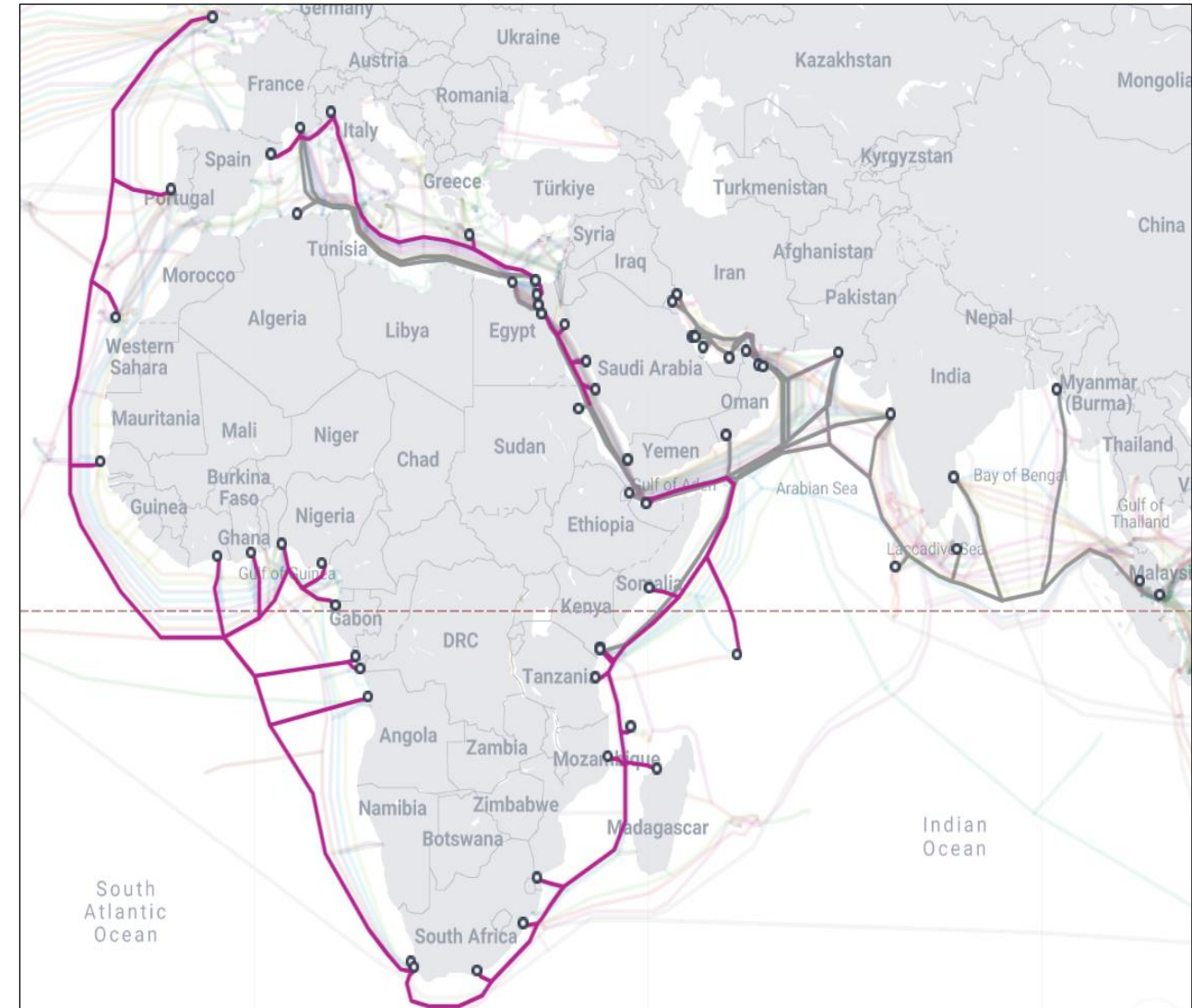
Pakistan's Submarine Connectivity (Current)

Int'l Cable System	Landing Countries
<u>SMW4</u>	France, KSA (Jeddah), UAE, Pakistan, India, Sri-Lanka, Bangladesh, Singapore
<u>IMEWE</u>	France, KSA(Jeddah), UAE, Pakistan, India
<u>AAE1</u>	France, KSA(Jeddah), Yemen, Djibouti, Oman, UAE, Qatar, Pakistan, India, Myanmar, Malaysia, China
<u>TWA1</u>	UAE, Oman, Pakistan
<u>SMW5</u>	France, KSA(Yanbu), Yemen, Djibouti, Oman, UAE, Pakistan, Sri Lanka, Singapore
<u>PEACE</u>	France, KSA (Jeddah), UAE, Pakistan, Singapore
<u>CHINA</u>	Pak – China OFC Cable



Pakistan's Submarine Connectivity (Planned)

Int'l Cable System	Landing Countries
<u>AFRICA 1</u>	France, KSA (Duba), Yemen, Djibouti, UAE, Pakistan
<u>SMW6</u>	France, KSA (Yanbu), Djibouti, Oman, UAE, Qatar, Bahrain, Pakistan, India, Sri Lanka, Bangladesh, Singapore
<u>2AFRICA</u>	UK, Spain, France, KSA (Al-Khobar, Duba, Jeddah, Yanbu), Djibouti, Oman, UAE, Qatar, Bahrain, Kuwait, Iraq, Pakistan, India
<u>MCG-1</u>	Pakistan, Oman



Connectivity - an opportunity !

THE EUROPEAN EXAMPLE

One rulebook and pooled financing turned 27 separate markets into a single connected economy.



1999 — Common Regulatory Framework

Harmonized spectrum, licensing & telecom rules across all member states.



2015 — Digital Single Market Strategy

One policy umbrella replacing 27 sets of bilateral rules.



2017 — Roaming Charges Abolished

Instant, borderless connectivity for 450 million people.

THE CENTRAL ASIAN OPPORTUNITY

The CAREC region spans a geography similar to Europe's before its unification, a model that already exists and can be adapted



Trade & Digital Corridor Access

Direct land and data links connecting China, Central Asia and South Asia.



Digital Transit Hub Potential

Pakistan as a bandwidth corridor — new transit-fee revenue streams.



Regional Market of 11 States

A shared rulebook could unlock the same scale gains Europe captured.

Europe turned 27 separate markets into one connected economy, What's holding **Central Asia back?**



Thanks