



Independent Communications Authority of South Africa

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BI-ANNUAL REPORT ON THE ANALYSIS OF TARIFF NOTIFICATIONS SUBMITTED TO ICASA FOR THE PERIOD 01 JANUARY 2019 TO 30 JUNE 2019

Disclaimer: Information contained in this Report is based on notifications submitted by licensees in terms of regulation 9(1) of the Standard Terms and Conditions Regulations, Government Gazette No. 33294 and regulation 5(1) of the End User and Subscriber Service Charter Regulations, Government Gazette No. 39898, as amended. Where necessary additional research was conducted to compare tariff plans.

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Glossary

TERM	DEFINITION
Flat-rate tariffs	Tariffs that charge the same retail rate for calls to any subscriber.
Dynamic tariffs	These tariff plans are value based according to Dorgham (2015) since they offer lower retail prices depending on location, traffic, network capacity, time of the day and customer segment.
In-bundle rate	Manx telecom refers to this as a package in which a subscriber is offered allocated capacity at a lower price; anything used within this package is charged at in-bundle rates.
On-Net (On network) Tariff	Manx telecom defines this as the price per minute of a call from a mobile cellular prepaid telephone to a mobile cellular subscriber of the same network.
Out-of-Bundle-Rate	The ESSUC (2018) defines this rate as the price that an end user is charged upon depletion of the allocated bundle.
Off-Net (Off network) tariff	This according to Manx Telecom, is the price per minute of a call from a mobile cellular prepaid telephone to a mobile cellular subscriber of another (competing) network.
Post-paid Plan	The ESSUC (2018) defines this as a service in which an end-user pays monthly subscription and usage charges at the end of each month for the allocation of voice minutes, SMS and data services.
Prepaid Plan	The ITU (2010), defines this as a mobile cellular service in which a subscriber pays in advance for the allocation of voice minutes, SMS and data in fixed amounts.

Executive Summary

The Independent Communications Authority of South Africa (ICASA, hereon referred to as the Authority) is mandated to regulate electronic communications in the public interest. In ensuring that it carries this mandate effectively, it monitors the information communications and technology (ICT) sector to ensure that interests of the consumers are promoted as per object 2(n) of the Electronic Communications Act No. 36 of 2005 (ECA, as amended). This tariff analysis report aims to ensure that end-users (customers) are aware of the various prepaid retail tariffs in the telecommunications sector which were filed with the Authority during the period of 01 January 2019 to 30 June 2019, as well as provide an update on initiatives which are currently underway to reduce the cost to communicate. This ensures that there is retail tariff transparency, which could potentially encourage competition as it is likely to minimise pricing and product information asymmetries in the sector.

Table 1 below shows the types of notifications received in the period 01 January 2019 to 30 June 2019.

Table 1: Type of Notifications received- 01 January 2019 to 30 June 2019

Notification Type	Other Licensed Operators (OLOs)	Cell C	MTN	MWEB	Telkom	Vodacom	Grand Total
Amendment	1	20	17	4	11	33	86
Extension	-	9	6	-	-	6	21
New Product	5	4	8	6	2	9	34
Promotion	-	4	14	3	2	12	35
Termination	-	-	2	1	-	-	3
Grand Total	6	37	47	14	15	60	179

Source: ICASA Database based on Tariff Notifications

The Authority received a total of 179 tariff notifications, which included 35 promotions, 86 amendments, 21 extensions, 34 new products and 3 terminations during the period under review, i.e. 01 January 2019 to 30 June 2019. Out of the 179 tariff notifications, 6 were received from Other Licensed Operators (OLO's), namely Amobia Communications, Cheap Calls, Cybersmart, Fusion and Techknowledge, which introduced new products, whilst Lasernet filed an amendment.

The Authority received five flat-rate tariff notifications in the period under review. A new default flat-rate tariff plan was introduced by MTN on 03 April 2019, namely the MTN Inflow price plan which charges R 0.99 per minute. MTN's new default price plan charges R 1.01 (50.5%) less than the previously filed default price plan i.e. the MTN Connect. Vodacom increased its voice rates on 08 March 2019 for both Daily free Calls and Anytime Per Second by 1.6% from R 1.23 per minute to R 1.25 per minute and Power Bonus and Power Pack plans by 1.3% from R 1.53 per minute to R 1.55 per minute. Vodacom's attributes the marginal price increases for the mentioned tariff plans to a need to mitigate against revenue dilution as a result of the End-user and Subscriber Service Charter Amendment Regulations, 2019 which came into full effect on 12 April 2019.

In terms of mobile data services, the most prominent changes were the amendment of prepaid out-of-bundle data rates by Vodacom and MTN, from R0.89 per megabyte (post-paid and hybrid) and R 0.99 per megabyte (MB) (prepaid) to R 0.49 per megabyte, respectively and amendments to terms and conditions of provision of data services as part of the operators' response to the amended End-User and Subscriber Service Charter (EUSSC) Regulations. Both Vodacom and Cell C filed the Terms and Conditions which cater for rolling over and transferring of data services. For example, to qualify for data roll over, Vodacom customers are required to purchase an additional data bundle of equivalent validity period and size (or greater) prior the expiry of the existing/initial data bundle. Cell C customers who would like to roll over between 501MB and 3GB of data with validity period of 30 days are charged R 0.03 for each megabyte (MB) they roll over. Evidence thus far, regarding the impact of the EUSSC Regulations suggest that customers are most likely not opting into OOB rates and also that specific licensees' decision to reduce OOB rate has negatively impacted their data service revenues.

Furthermore, the Authority acknowledges that subscribers who signed up and used a variety of promotional tariffs provided by operators would have derived some benefit and/or experienced a reduction in standard tariff rates. For instance, Vodacom customers benefitted from the introduction of the integrated promotional Power Bundles and Telkom Mobile subscribers benefitted from the promotional data and FreeMe integrated bundles that are part of the Telkom Mobile

Promotional IDOLS Bundles tariff plan. MTN customers benefitted from the Personalised All-Net Voice Bundles by receiving tailor-made voice bundles in accordance with their spending patterns. The introduction of the MTN Double Your Bundle promotion is also beneficial for MTN customers as it offers them free additional bundle (voice minutes or data) equivalent to the recharge bundle. Licensees also filed a number of over-the-top (OTT) service bundles in the period under review such as the MTN Video Streaming Bundles, Cell C WhatsApp Boost and MTN Personalised Social Bundles.

The Authority continues to work on regulatory initiatives aimed at reducing communication costs. Currently, a Market Review process is being conducted into the mobile broadband services market to identify markets or market segments that may be susceptible to *ex ante* regulation in terms of section 67 of the ECA. The mobile broadband market has been prioritised following the findings made in the Priority Markets Inquiry which was published by the Authority on 17 August 2018.

1. Introduction

In terms of the Standard Terms and Conditions for Individual Licences Regulations (*Government Gazette No. 33294*) of 2010 and End-user and Subscriber Service Charter Regulations (*Government Gazette No. 39898*) of 2016, as amended, individual licensees are required to file notifications of tariffs and promotional tariffs with the Authority, seven (7) days prior to launching them in the market. The analysis contained in this report is based on prepaid tariffs that were filed during the period of 01 January 2019 to 30 June 2019¹.

The purpose of the report is to highlight the different prepaid tariff plans (prices and product offerings) which were filed during the period under review. The aim of this report is aligned to object 2(n) of the ECA which is to "*promote the interest of consumers with regard to the price, quality and the variety of electronic communication services*" as it seeks to ensure that there is retail price transparency. This would enable customers to make an informed choice, in terms of tariff plan preferences and/or preferred service providers based on their different offerings.

Following the 2018/19 FY fourth quarter (Q4) Tariff Analysis Report, published on ICASA's website on 03 April 2019, the key purpose of this report is to provide an update on prepaid tariffs that were filed by the different mobile operators during the period under review.

This report entails an analysis of various retail tariff plans and promotions such as the standard prepaid data and voice, promotional prepaid data and voice, integrated prepaid bundles, monthly Fibre-to-the-home (FTTH) packages, filed by different Individual licensees during the period under review.

This report is categorised into the following sections:

¹ Where a comparative analysis is done, notifications/tariff plans filed previously (not within the period under review) are also considered in the analysis.

- Section 2 provides an analysis of the notifications received, which are categorised into Standard prepaid data tariffs, Promotional prepaid data tariffs, Standard prepaid voice tariffs, Promotional prepaid voice tariffs, Standard prepaid integrated bundles, Promotional prepaid integrated bundles, Standard FTTH tariff plans and Promotional FTTH tariff plans; and
- Section 3 provides concluding remarks.

An overview of other² tariff notifications filed during the period under review is then depicted in Annexure A and it shows that there has been competition in terms of the promotions offered by the licensees in the market. Annexure B shows promotions and tariff plans which ended during the period under review.

2. Analysis of Tariffs Notified to the Authority

There were mainly six types of prepaid tariff plans that were on offer in the market during the period under review, these are:

- Standard prepaid data tariffs;
- Promotional prepaid data tariffs;
- Standard prepaid voice tariffs;
- Promotional prepaid voice tariffs;
- Standard prepaid integrated bundles; and
- Prepaid promotional integrated bundles.

Each type of tariff is analysed in sub-sections 2.1, 2.2., 2.4. and 2.5. below. The standard prepaid integrated bundles and prepaid promotional integrated bundles are analysed in sub-section 2.6.

A brief analysis of month-to-month (MtM) FTTH plans and offerings is provided in sub-section 2.7.

² Other tariff notifications filed or received during the period under review which were not discussed in the main part of this report and continue to exist in the market after 30 June 2019.

2.1. Analysis of Standard Prepaid Data Tariffs and Data Bundles Tariff Plan Changes

2.1.1. Prepaid Data plans

This sub-section provides an updated analysis and highlights changes, if any, to prepaid data plans since the preceding 2018/19FY Q4 Bi-annual Tariff Analysis Report, on the prepaid data bundle prices charged by the four main Mobile Network Operators (MNOs), Mobile Virtual Network Operators (MVNOs) and Other Licenced Operators (OLOs). Therefore, this sub-section is divided into two parts, i.e. 2.1.1.1. which shows the prepaid data prices for bundles offered by the MNOs filed in the period under review and 2.1.1.2. which shows the prepaid data prices for bundles offered by MVNOs and OLOs filed with the Authority in the period under review.

2.1.1.1. Prepaid Data Prices for bundles offered by MNOs

2.1.1.1.1. Prepaid 30-day validity period data bundles

There were no price changes filed with the Authority during the period under review for 30-day prepaid data bundles offered by the four MNOs namely Vodacom, MTN, Cell C and Telkom Mobile. Therefore, no update is provided in this report. The current prices and the respective analysis can be found in the 2018/19FY Q4 Bi-Annual Tariff Analysis Report, which was published on ICASA's website on 03 April 2019³.

However, whilst the prices of the various data bundles did not change, there was a change⁴ in the out-of-bundle (OOB) data rate for certain licensees such as MTN and Vodacom. Therefore, a comparison of the various in-bundle rates offered across the different 30-day data bundles and the out-of-bundle (OOB) data rates is done in the next sub-section.

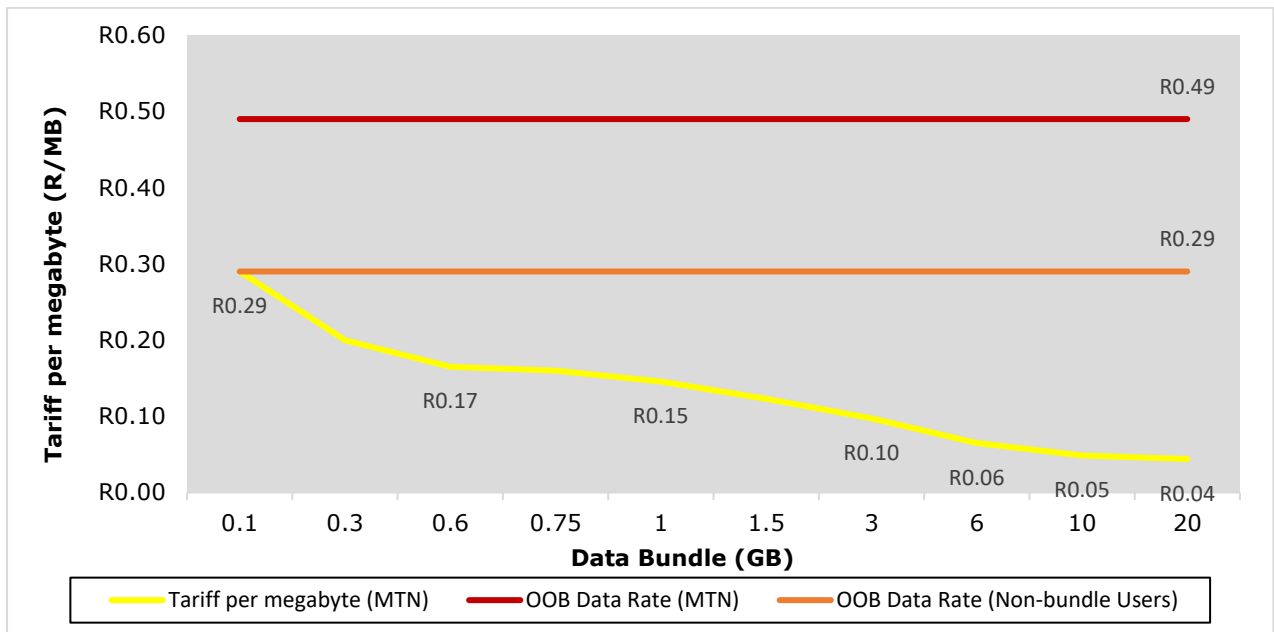
³ Page 25-32. Available online at : on ICASA's website < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-jul-dec-2018>> Accessed on 22 July 2019

⁴ The revised OOB data rate is analysed in sub-section 2.1.2

2.1.1.1.1. In-bundle rate for 30-day data bundle vs out-of-bundle rate

An inverse relationship between the data bundle volume and the tariff per megabyte exists whereby the larger the data bundle that a customer purchases, the lesser the in-bundle rate they pay for each megabyte (R/MB) of the purchased bundle. The reduction of in-bundle rates when customers buy large data volumes results in a significant price differential between the out-of-bundle (OOB) data rate and the in-bundle rate. Figures 1 – 4 depict the gap that exists between the OOB data rate and in-bundle rates for each MNO, namely MTN, Vodacom, Telkom Mobile and Cell C.

Figure 1: MTN In-bundle Rates vs Out-of-bundle Rate for bundle users and non-bundle users



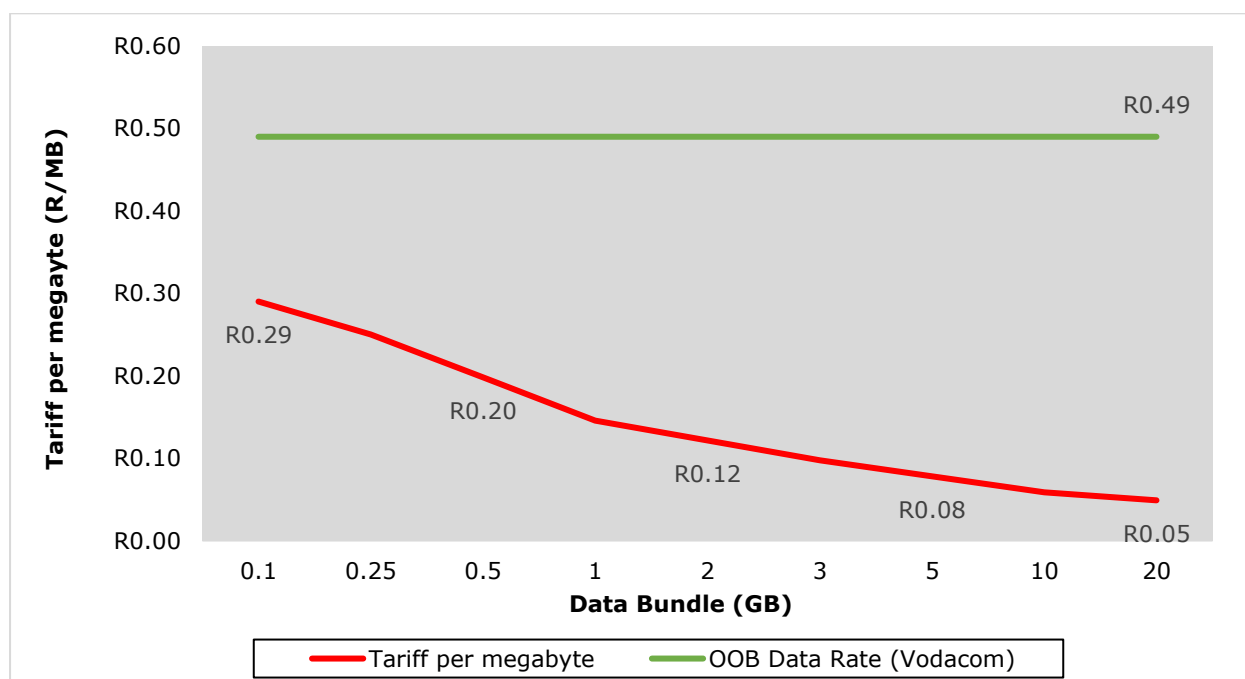
Bundle Size	100MB	300MB	600MB	750MB	1GB	1.5GB	3GB	6GB	10GB	20GB
Bundle Price	R 29	R 60	R 99	R 120	R 149	R 189	R 299	R 399	R 499	R 899
OOB Data Rate	R 0.49	R 0.49	R 0.49	R 0.49	R 0.49	R 0.49	R 0.49	R 0.49	R 0.49	R 0.49
OOB Data Rate (non-bundle users)	R 0.29	R 0.29	R 0.29	R 0.29	R 0.29	R 0.29	R 0.29	R 0.29	R 0.29	R 0.29
In-bundle Rate	R 0.29	R 0.20	R 0.17	R 0.16	R 0.15	R 0.12	R 0.10	R 0.06	R 0.05	R 0.04
OOB & In-bundle rate difference	R 0.20	R 0.29	R 0.33	R 0.33	R 0.34	R 0.37	R 0.39	R 0.43	R 0.44	R 0.45

Source: ICASA Database based on Tariff Notifications

Figure 1 above depicts a graphical comparison of MTN’s prepaid OOB data rate against the in-bundle rates of the 30-day standard prepaid data bundles from 100MB to 20GB. The licensee filed a notification of the reduction of its OOB data rates with the Authority on 17 January 2019, which had the OOB data rate for prepaid customers (data bundle users) reducing from R 0.99 per MB to R 0.49 per MB. This reduction is a positive move towards reducing cost to communicate, however the OOB data rates are still significantly higher than the in-bundle rates, as shown in the figure above. For an example, the least OOB and in-bundle rate difference is realised on the 100MB bundle that has an in-bundle rate of R 0.29 per MB, which is R 0.20 (40.8%) cheaper than the OOB data rate. The other bundles’ in-bundle rates are significantly lower when compared to the OOB rate for bundle users ranging from an absolute price differential of R 0.29 to R 0.45. This is what customers would save across the different bundle sizes if they opt to purchase a data bundle instead of opting to consume data at OOB data rates once their data bundle has been depleted.

It should be noted that MTN also introduced an OOB data rate for its non-bundle using customers on 17 January 2019. Non-bundle users are customers who do not purchase data bundles and/or seldom use data/internet services. These customers are charged an OOB rate of R 0.29 per MB, as illustrated in the figure above.

Figure 2: Vodacom In-bundle Rates vs Out-of-bundle Rate

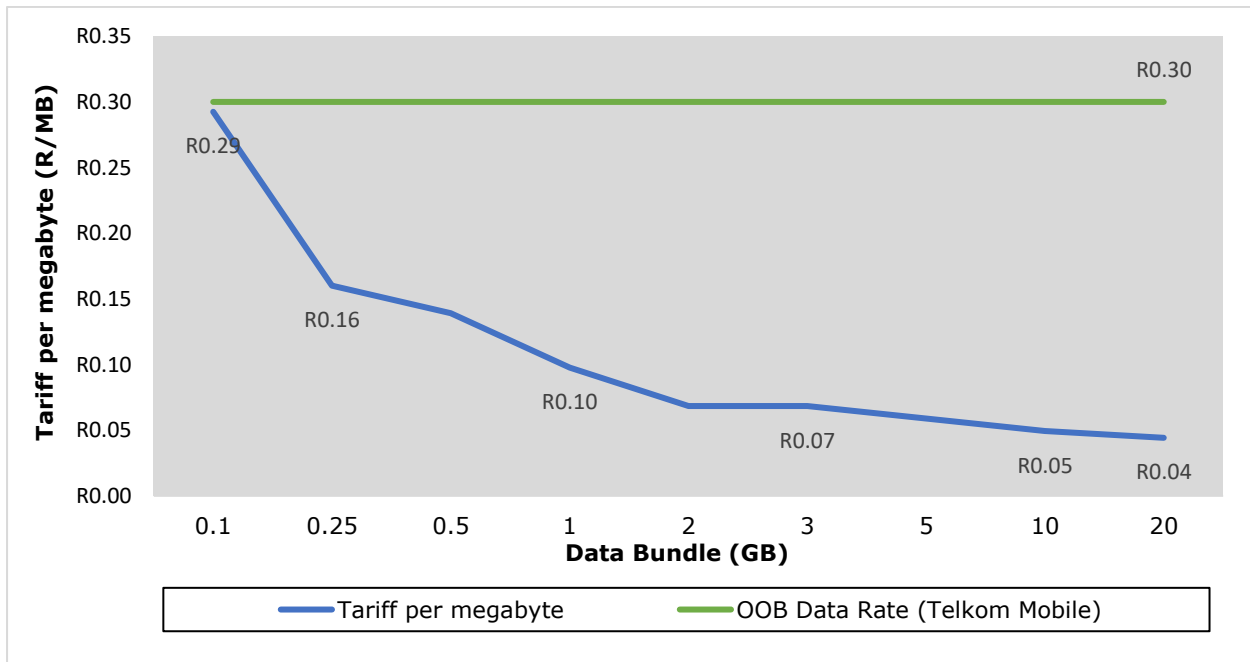


Bundle Size	100MB	250MB	500MB	1GB	2GB	3GB	5GB	10GB	20GB
Bundle Price	R 29	R 63	R 100	R 149	R 249	R 299	R 405	R 605	R 1 010
OOB Data Rate	R 0.49	R 0.49	R 0.49	R 0.49	R 0.49	R 0.49	R 0.49	R 0.49	R 0.49
In-bundle Rate	R 0.29	R 0.25	R 0.20	R 0.15	R 0.12	R 0.10	R 0.08	R 0.06	R 0.05
OOB & In-bundle rate difference	R 0.20	R 0.24	R 0.29	R 0.34	R 0.37	R 0.39	R 0.41	R 0.43	R 0.44

Source: ICASA Database based on Tariff Notifications

Vodacom reduced its prepaid OOB data rate on 19 February 2019, from R 0.99 per MB to R 0.49 per MB. The same deduction about the increase in price differential between the OOB rate and in-bundle rate, as bundle sizes increase, can also be observed in Figure 2. Although the operator's effort to cut OOB data rates is to the benefit of the customers, purchasing a data bundle still saves customers a significant amount of money. For an example, depleting 500MB on out-of-bundle rate will cost customers R 245 (R0.49/MB * 500MB), while purchasing a 500MB bundle will cost customers R 100, saving them R 145.

Figure 3: Telkom Mobile In-bundle Rates vs Out-of-bundle Rate



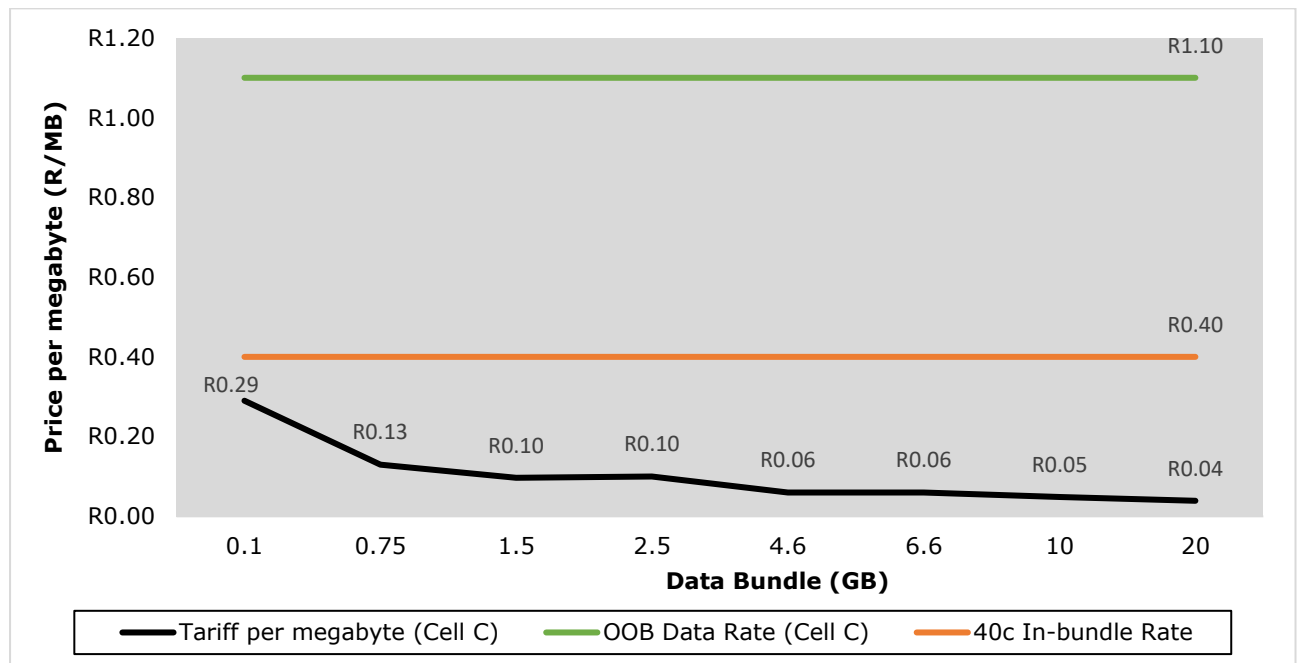
Bundle Size	100MB	250MB	500MB	1GB	2GB	3GB	5GB	10GB	20GB
Bundle Price	R 29.25	R 39.50	R 69.60	R 100	R 140	R 201	R 301	R 505	R 905
OOB Data Rate	R 0.30	R 0.30	R 0.30	R 0.30	R 0.30	R 0.30	R 0.30	R 0.30	R 0.30
In-bundle Rate	R 0.29	R 0.16	R 0.14	R 0.10	R 0.07	R 0.07	R 0.06	R 0.05	R 0.04
OOB & In-bundle rate Difference	R 0.01	R 0.14	R 0.16	R 0.20	R 0.23	R 0.23	R 0.24	R 0.25	R 0.26

Source: ICASA Database based on Tariff Notifications

Figure 3 above portrays the difference between Telkom Mobile’s OOB data rate and the in-bundle rates incurred by customers when purchasing the 30-day prepaid data bundles. It can be deduced from the figure above, that Telkom Mobile has the lowest range of the OOB and in-bundle rate difference, from R 0.01 to R 0.26 while Cell C has the highest, from R 0.81 to R 1.06, as shown in figure 4 below. This simply means that Telkom Mobile charges the least OOB data rate, which has the lowest price differential to the in-bundle rates, among all four MNOs.

Figure 4 below shows Cell C’s OOB data rate versus the 40c in-bundle rate and in-bundle rates.

Figure 4: Cell C Out-of-bundle Rate, In-bundle Rates and 40c In-bundle Rate



Bundle Size	100MB	750MB	1.5GB	2.5GB	4.6GB	6.6GB	10GB	20GB
Bundle Price	R 29	R 100	R 149	R 249	R 299	R 399	R 499	
OOB Data Rate	R 1.10	R 1.10	R 1.10	R 1.10	R 1.10	R 1.10	R 1.10	R 1.10
40c In-bundle Rate	R 0.40	R 0.40	R 0.40	R 0.40	R 0.40	R 0.40	R 0.40	R 0.40
In-bundle Rate	R 0.29	R 0.13	R 0.10	R 0.10	R 0.06	R 0.06	R 0.05	R 0.04
OOB & In-bundle rate difference	R 0.81	R 0.97	R 1.00	R 1.00	R 1.04	R 1.04	R 1.05	R 1.06
40c In-bundle rate & In-bundle rate difference	R 0.11	R 0.27	R 0.30	R 0.30	R 0.34	R 0.34	R 0.35	R 0.36

Source: ICASA Database based on Tariff Notifications

Cell C has the largest OOB and in-bundle rate difference among the MNOs, when considering 30-day prepaid data bundles from 100MB to 20GB, ranging from

R 0.81 to R 1.06. Using the 10GB bundle as an example, Cell C, MTN, Vodacom and Telkom Mobile’s OOB data rates are respectively 21 times, 10 times, 8 times and 6 times more than their respective in-bundle rates. The operator also filed a notification regarding the 40c In-bundle Rate with the Authority on 25 February 2019 that came into effect on 01 March 2019, which charges customers R 0.40 per MB for data services upon depletion of their data bundle.

The amendment of the EUSSC Regulations has had a positive effect on customers. The regulations compel operators to either terminate internet services and not permit any OOB data usage by an end-user in a case of depletion of data and make provisions for the end-user to consent to OOB data rate charges, alternatively to allow data usage at the in-bundle rate. This has improved operators’ transparency to customers and reduced information asymmetry, with customers knowingly opting into out-of-bundle rates.

2.1.1.1.2. Other standard prepaid data bundles offered by MNO’s

2.1.1.1.2.1. Vodacom Data Refill Service Amendment

Vodacom filed an amendment of its Data Refill service plan with the Authority on 24 January 2019. This data service plan was initially filed with the Authority on 22 June 2017 as a promotional offer. The amendment entailed an increase in the data allocation for this bundle from 5MB to 10MB without a resulting increase in price in order to ensure that customers subscribed to this service receive more value and that they have continued access to internet. However, the reduction in validity period of the bundle, from 7 days to 3 days, means that unused data will now expire earlier to the detriment of customers. Table 2 details the changes to the Vodacom Data Refill service plan.

Table 2: Vodacom Data Refill Amendment

	Bundle Size	Validity	Price
Previous	5MB	7 Days	R 3
Current	10MB	3 Days	R 3

Source: ICASA Database based on Tariff Notifications

Customers can opt in or out of the service through the *135*6# USSD. If a customer does not have sufficient funds to purchase another Data Refill bundle after one has been depleted, an OOB data rate of R 0.30/MB will apply for prepaid customers, which is R 0.19/MB or 38.8% less than the normal R 0.49 per MB OOB rate for prepaid customers who are not subscribed to Data Refill service.

2.1.1.1.2.2. Vodacom Just 4 You Bundles

Just 4 You offers were initially launched for prepaid, top-up and uChoose customers on 28 October 2014, and ever since its launch, various amendments have been filed. During the period under review, two amendments were filed, on 15 February 2019 and 06 May 2019. The last amendment was an introduction of new prepaid data bundles which led to an increase in product variety and customer choice.

Table 3 shows the new prepaid and top-up Just 4 You bundles with their respective validity periods, prices and in-bundle rates, which were introduced in the amendment filed on 06 May 2019.

Table 3: Vodacom Just 4 You Data Bundles

Offer Description	Allocation	Validity	Offer Type	Price (Incl. VAT)	In-bundle Rate (R/MB)
10MB for 2 days	10MB	2 Days	Data	R 2.50	R 0.25
50MB for 3 days	50MB	3 Days	Data	R 5.50	R 0.11
150MB for 30 days	150MB	30 Days	Data	R 39	R 0.26
100MB for 1 hour	100MB	1 Hour	Data	R 6	R 0.06
1GB for 1 hour	1GB	1 Hour	Data	R 12	R 0.01
180MB for 3 days	180MB	3 Days	Data	R 10	R 0.06

Source: ICASA Database based on Tariff Notifications

Customers benefit from reduced in-bundle rates, for instance a customer who purchases a 150MB Just 4 You data bundle valid for 30 days would pay an effective in-bundle rate of R 0.26 which is R 0.23 or 46.9% less than the standard OOB rate which is R 0.49 per MB.

2.1.1.1.2.3. Cell C Emergency Data and Emergency Airtime

The Cell C Emergency Data was initially filed with the Authority on 28 November 2017 and last amended on 20 November 2018, while the Emergency Airtime was initially filed on 12 November 2013 and last amended on 28 February 2017 to include the Emergency Airtime Auto Top-up feature.

On 16 May 2019, Cell C filed an amendment of its Emergency Airtime and Emergency Data offerings which provided customers with the ability to take up multiple advances up to the amount they individually qualify for. This is a new customer experience benefit that did not exist prior to this amendment. The service fee of R 1 per data advance transaction remained unchanged. Thus, with the amendment, if customers qualify for large advances, they can take multiple Emergency Airtime or Emergency Data until their limit is exhausted, by dialing the *147# USSD code. Customers are only eligible for another airtime/data advance once the outstanding balance has been repaid.

The amendment came into effect on 28 May 2019. It should be noted that the data bundles available on the service cannot be transferred nor carried over and are forfeited if not used within the validity period.

2.1.1.2. Other Standard Prepaid Mobile Data Bundles offered by Mobile Virtual Network Operators (MVNOs) and Other Licensed Operators (OLOs)

The prepaid mobile data market is dominated by the big four MNOs namely Vodacom, MTN, Cell C and Telkom Mobile, however these are not the only providers of mobile data services since there are also Mobile Virtual Network Operators (MVNOs) and Other Licensed Operators (OLOs) who offer this service. This section provides pricing information of the various prepaid mobile data bundles offered by these smaller players, filed with the Authority in the period under review. The Authority aims for retail pricing transparency and for customers to be able to compare prices and offerings so they can make informed decisions and choices.

2.1.1.2.1. Sakeng Mobile Prepaid Data Plan

Cell C initially filed the prepaid data plan tariff plan of its MVNO, Sakeng Mobile on 05 December 2018 which was amended on 23 January 2019. The amendment included a price reduction of once-off bundles and the reduction of the validity periods. Table 4 below shows the once-off prepaid data bundles that are offered by Sakeng Mobile and changes in terms of data allocation, prices, validity periods and their respective variances.

Table 4: Sakeng Mobile Amended Once-off Data Bundles

Data Bundle Size	Previous Validity Period	Current Validity Period	Previous Price	Current Price	Price Difference	Price Variance (%)
25MB	90 Days	30 Days	R 9	R 5.50	-R 3.50	-38.9%
50MB	90 Days	30 Days	R 17	R 9.50	-R 7.50	-44.1%
100MB	90 Days	30 Days	R 28	R 17	-R 11	-39.3%
250MB	90 Days	30 Days	R 60	R 37	-R 23	-38.3%
500MB	90 Days	90 Days	R 95	R 88	-R 7	-7.4%
1GB	90 Days	90 Days	R 140	R 140	N/A	N/A
2GB	90 Days	90 Days	R 225	R 225	N/A	N/A
3GB	90 Days	90 Days	R 290	R 290	N/A	N/A

Source: ICASA Database based on Tariff Notifications

The reductions in the abovementioned Sakeng Mobile's prepaid data tariffs has a positive financial impact for its customers, with the 50MB bundle having the highest price reduction in percentage terms of 44.1%, while the 250MB bundle had the highest absolute value reduction of R 23.

Sakeng's prepaid data bundle prices are competitive when compared to those charged by the big four MNOs and FNB Connect. Customers opting for Sakeng Mobile's 100MB pay R 12 (41.4%) and R 10 (37%) less than what they would pay on the big four MNOs and FNB Connect, respectively. Sakeng Mobile charges R 88 for its 500MB bundle while Vodacom charges R 100, which is a R 12 (12%) price differential. On the other hand, Sakeng Mobile charges R 18.40 (26.4%) more than Telkom Mobile for the 500MB data bundle, however it should be noted that Sakeng Mobile's 500MB data bundle has a 90-day validity period.

2.1.1.2.2. FNB Connect Prepaid Data Bundles Amendment

Cell C filed an amendment of the tariff plans of its MVNO, FNB Connect, with the Authority on 02 May 2019 which came into effect on 12 May 2019. The amendment was done to increase its prepaid 30-day once-off bundle offerings by introducing the 80MB and 120MB bundles for R 22 and R 31, respectively. It is also worth noting that FNB Connect offers rolling over and transferring of unused data for free, with both services allowing usage of remaining/transferred data for an additional 30 days. Table 5 below shows FNB Connect’s once-off prepaid data bundles currently offered in the market.

Table 5: FNB Connect Once-off Data Bundles

Data Bundle Size	Price
25MB	R 7.50
50MB	R 14
80MB	R 22
100MB	R 27
120MB	R 31
300MB	R 64
500MB	R 85
1GB	R 125
2GB	R 215
5GB	R 390
10GB	R 690
20GB	R 1 380

Source: ICASA Database based on Tariff Notifications

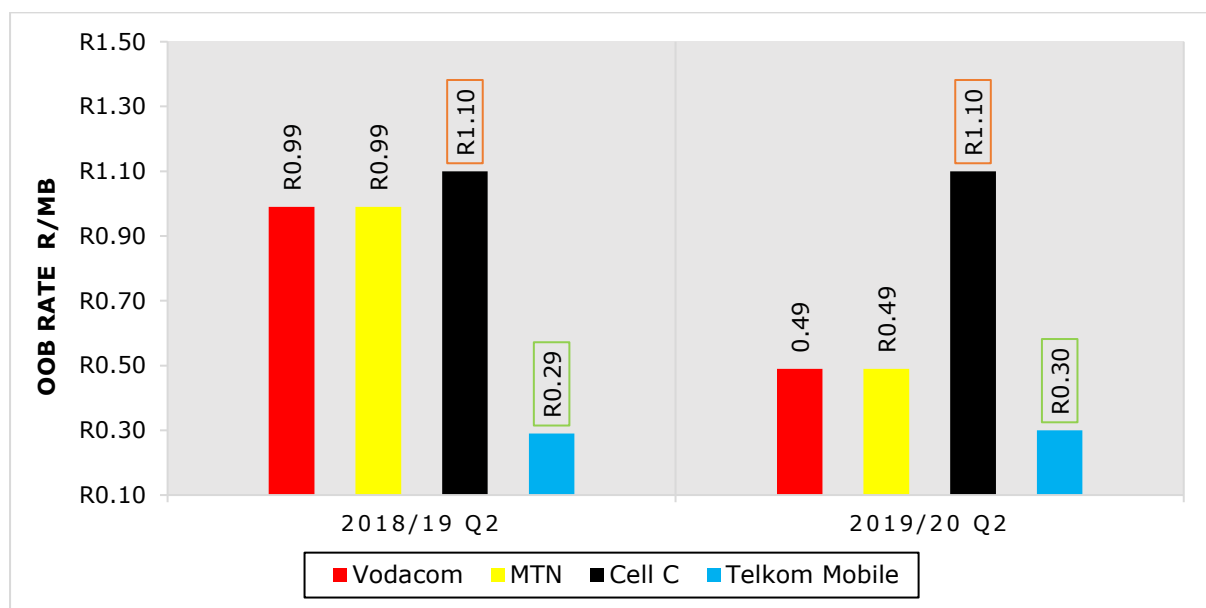
Compared with the 100MB offered by the big four MNOs at R 29, FNB Connect’s 120MB bundle offers customers 20MB more data for an additional R 2, i.e. 20% more data for a 7.4% increase in price. It also charges only R 27 for its 30-day 100MB bundle offering, which is R 2 or 6.9% less than the big four mobile operators.

2.1.2. Out-of-bundle data rates per MB

The End-User and Subscriber Service Charter Amendment Regulations 2019, as amended, have given customers control and choice in terms of decision making when faced with depletion of data, given that they now have an option to either opt in or opt out of out-of-bundle OOB data rates.

Figure 5 below compares OOB data rates per MB from the previous Q2 Bi-annual tariff analysis⁵ to the period under review, i.e. a year-on-year (y-o-y) comparison. Figure 5 shows that Vodacom and MTN have decreased their respective prepaid OOB data rates from R 0.99 per MB to R 0.49 per MB. Telkom Mobile filed a notification with the Authority to increase its tariffs in response to the 1% increment on 19 March 2019, which resulted in the OOB data rate increasing from R 0.29 per MB to R 0.30 per MB while Cell C has kept its OOB data rates unchanged at R 1.10 per MB.

Figure 5: Vodacom, MTN, Cell C and Telkom Mobile's Out-of-Bundle Rates per MB



Source: ICASA Database based on Tariff Notifications

MTN filed a notification with the Authority on 17 January 2019 amending its prepaid OOB rate⁶ effective on 29 January 2019. MTN's data users are now paying an OOB data rate of R 0.49 per megabyte, which is a 50.5% decrease.

⁵ Quarter 2 (Q2) Bi-annual Tariff Analysis Report is published at the end of Q2 which July-September is as per the Authority's financial year. Q2 in this case therefore does not have the same meaning as period under review (i.e. January-June) which refers to the period when the tariff plans being analysed in this report were filed with the Authority. The previous i.e. 2018/19 FY Q2 Bi-annual Report was published on 15 October 2018 and it can be found on ICASA's Website at :< <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-jan-jun-2018> > Accessed on 25 July 2019.

⁶ MTN has two OOB rates, one for bundle users which is R 0.49/MB and another for non-data bundles users which is R 0.29/MB which is 70.7% less compared to its previous OOB rate of R 0.99/MB.

Vodacom also filed an amendment of its OOB data rate with the Authority on 19 February 2019, reducing its prepaid, hybrid and post-paid OOB data rates. The reduction of OOB data rates to R 0.49 per MB reflects a 50.5% decline for prepaid customers and a 44.9% decline for hybrid and post-paid customers, from previous R 0.99 and R 0.89 per megabyte, respectively. The plans that had OOB data rates that were lower than R 0.49 per megabyte were not affected by the amendment.

The reduction in OOB rates by MTN and Vodacom could be in response to the EUSSC Regulations amendment which came into effect on 01 March 2019, in particular regulation 8B (2), which prohibits the operators from automatically charging OOB rates upon the depletion of the customer's data bundle. Therefore, MTN and Vodacom decreased their respective OOB rates to make it more affordable for customers. This also increases the chances of customers opting into the OOB rate, thus protecting the OOB data revenues for these licensees.

FNB Connect still offers an OOB data rate of R 0.30 per MB as reported in the preceding 2018/19FY Q4 Bi-Annual Tariff Analysis Report. Sakeng Mobile offers R 0.35 per MB, R 0.40 per MB and R 0.45 per MB prepaid OOB data rates, depending on the tariff plan one chooses to opt into. Telkom Mobile increased its OOB data rate from R 0.29 per MB to R 0.30 per MB on 19 March 2018. However, it is still the lowest amongst the four MNOs. Telkom Mobile and FNB Connect offer the lowest OOB data rates followed by Sakeng Mobile, Vodacom and MTN, at R 0.49 per MB, and Cell C which charges the highest OOB data rate of R 1.10 per MB.

2.1.3. Over-the-Top (OTT) Service Offerings

This section focuses on Over-the-Top (OTT) services which are used by a customer to ride on top of an electronic communications network services of a licensed operator to which the customer is connected⁷. In order to capitalise on the growth in uptake of OTT services, licensed operators have launched various product offerings so as to maximise their data revenues. The sub-sections below discuss

⁷ Definition of what OTT services are found online: < https://www.itu.int/en/ITU-D/Regional-Presence/Americas/Documents/EVENTS/2015/0421-BS-Economic/1_2.pdf > Accessed on 21 February 2019.

the OTT linked product offerings which MNOs filed notifications for during the period under review.

2.1.3.1. MTN Promotional Video Streaming Bundles

MTN filed an extension of its Video Streaming Bundles promotion with the Authority on 28 January 2019. This promotion was extended from 31 January 2019 and it will continue to exist in the market until further notice. Customers can stream ShowMax and DStv Now content with the promotional bundles and they can be purchased on a once-off or recurring basis through a USSD code, MyMTN App or Interactive Voice Response (IVR). Table 6 below details the MTN Promotional Video Streaming Bundles.

Table 6: MTN Promotional Video Streaming Bundles

Long Form Video Streaming Bundle Name	Inclusive Data	Validity	Bundle Price (VAT Incl.)
MTN Video Streaming Bundle - 5GB	5GB	30 days	R 159
MTN Video Streaming Bundle - 10GB	10GB	30 days	R 299
MTN Video Streaming Bundle - 20GB	20GB	30 days	R 499

Source: ICASA Database based on Tariff Notifications

2.1.3.2. Cell C WhatsApp Bundle Promotion

Cell C filed two amendments of its WhatsApp Bundle promotion with Authority on 20 February 2019 and 20 May 2019. The first amendment saw the bundle price increasing from R 17 to R 20 (17.6% increase) and the second amendment was another price increase from R 20 to R 29 (45% increase), as shown in table 7 below.

Table 7: Cell C Promotional WhatsApp Bundle

Service	Previous Monthly Subscription	New Monthly Subscription	Fair Usage Policy	Validity
20 February 2019 Amendment				
WhatsApp Bundle	R 17	R 20	1GB	1 Calendar Month
20 May 2019 Amendment				
WhatsApp Bundle	R 20	R 29	1GB	1 Calendar Month

Source: ICASA Database based on Tariff Notifications

In addition to the price amendments the promotional period were extended, from 31 May 2019 to 30 June 2019 and again to 30 September 2019.

2.1.3.3. Vodacom Google Play Store Bundles

Vodacom filed the Google Play Store Bundles with the Authority on 08 April 2019 which then became effective on 18 April 2019. The bundles enable customers to browse, download and update their applications on their Android devices and are available to prepaid, post-paid and hybrid customers through the *123# USSD code.

Table 8 below shows the Google Play Store data bundles available to customers for purchase and their respective validity periods.

Table 8: Google Play Store Bundles

Data Allocation	Price (VAT Inclusive)	Validity
200MB	R 5	1 Day
250MB	R 15	3 Days
500MB	R 29	7 Days
1GB	R 55	30 Days

Source: ICASA Database based on Tariff Notifications

It should be noted that the operator does not allow for the Google Play Store bundles to roll over after expiry and the usage thereof while roaming. However, having bundles specifically made for Google Play Store benefits customers with reduced effective rates. Customers wishing to purchase or update applications in their mobile devices can now choose not to buy a standard prepaid 1GB data bundle which costs R 149 (R 0.15 per MB) and rather purchase the 1GB Google Play Store bundle for R 55 (R 0.05 per MB), which would result in a saving of R 94.

2.1.3.4. MTN Youth Snack Bundles

MTN filed its Youth Snack Bundles promotion with the Authority on 28 May 2019 and launched it in the market on 06 June 2019. Upon purchasing the Youth Pulse Integrated Bundles, customers are rewarded with free social media data bundles

that enable the Youth Price Plan customers to have access to WhatsApp, Twitter, Facebook, YouTube and Instagram as part of the Youth Snack Promotion.

This promotional plan was also amended on 13 June 2019 to upsize the additional free data bundle for the Youth Pulse Weekly R 50 Integrated Bundle from 300MB to 500MB, as shown in the table below. The promotion is available to MTN PAYG customers between the ages of 18-24 years who have subscribed to the MTN Youth Pulse price plan.

Table 9 below shows the additional promotional value received by customers who purchased Youth Bundles in terms of the promotion.

Table 9: MTN Promotional Youth Snack Bundles

On-Net Minutes + Data Bundles	Previous Free Snack Pack Value/ Validity Period	Current Free Snack Pack Value/ Validity Period
Y'th/Pulse Daily R 5 Integrated bundle	100MB/1hour	100MB/1hour
Y'th/Pulse Daily R 10 Integrated bundle	200MB/1hour	200MB/1hour
Y'th/Pulse Weekly R 10 Integrated bundle	200MB/1Day	200MB/1Day
Y'th/Pulse Weekly R 50 Integrated bundle	300MB/1Day	500MB/1Day
Y'th/Pulse Monthly R 99 Integrated bundle	500MB/3Days	500MB/3Days

Source: ICASA Database based on Tariff Notifications

Customers receive additional data in accordance to the Youth Pulse Integrated Bundle they purchase. For example, a daily R 10 integrated bundle earns a customer free 200MB data valid for an hour, whereas a weekly R 10 integrated bundle earns a customer free 200MB data valid for a day. The promotional offer is in the market until further notice.

2.1.3.5. Cell C WhatsApp Boost

The Cell C WhatsApp Boost promotion was filed with the Authority on 29 May 2019 and was initially expected to be in the market from 07 June 2019 to 31 July 2019, however, on the 07th of June 2019 Cell C filed an extension of the promotion to 31 August 2019. This has been further extended to 30 September 2019. The promotional offer is available to prepaid, hybrid and post-paid customers who purchase the base (standard) daily, 5-day or monthly data bundles. When purchasing base bundles, customers are simultaneously offered the opportunity

to purchase the promotional WhatsApp Boost bundles, with the validity period equivalent to that of the base bundle purchased. It should be noted that the promotional bundles can only be simultaneously purchased with the base bundles and not on their own.

Tables 10 - 12 below show the Cell C WhatsApp Boost bundles and their respective base bundles.

Table 10: Cell C WhatsApp Boost Bundles (Daily)

Base Bundle Daily Bundle		WhatsApp Boost Daily Bundle		
Data Allocation	Price	Data Allocation	Price	WhatsApp Boost daily In-bundle Rate (R/MB)
5MB	R 2	5MB	R 1	R 0.20
25MB	R 4	25MB	R 2	R 0.08
65MB	R 9	65MB	R4.50	R 0.07
120MB	R 14	120MB	R 7	R 0.06
500MB	R 17	250MB	R 10	R 0.04
1024MB	R 20	250MB	R 10	R 0.04

Source: ICASA Database based on Tariff Notifications

Table 11: Cell C WhatsApp Boost Bundles (5-Day)

Base Bundle 5-Day Bundle		WhatsApp Boost 5-day Bundle		
Data Allocation	Price	Data Allocation	Price	WhatsApp Boost 5-day In-bundle Rate (R/MB)
45MB	R 8	45MB	R 4	R 0.09
80MB	R 12	80MB	R 6	R 0.08
250MB	R 25	250MB	R 7.50	R 0.03
600MB	R 50	600MB	R 20	R 0.03
1228.8MB	R 80	600MB	R 20	R 0.03
2252.8MB	R 100	600MB	R 20	R 0.03

Source: ICASA Database based on Tariff Notifications

Table 12: Cell C WhatsApp Boost Bundles (Monthly)

Base Bundle 30-day Bundle		WhatsApp Boost 30-day Bundle		
Data Allocation	Price	Data Allocation	Price	WhatsApp Boost 30-day In-bundle (R/MB)
15MB	R 5	15MB	R 2.50	R 0.17
40MB	R 12	40MB	R 6	R 0.15
65MB	R 20	65MB	R 10	R 0.15
100MB	R 29	100MB	R 11.60	R 0.12
300MB	R 49	300MB	R 19.60	R 0.07
750MB	R 80	750MB	R 20	R 0.03
1024MB	R 100	750MB	R 20	R 0.03
1536MB	R 149	750MB	R 20	R 0.03
2048MB	R 199	750MB	R 20	R 0.03
3072MB	R 249	750MB	R 20	R 0.03

Source: ICASA Database based on Tariff Notifications

The promotional offer is available on base bundles purchased via *147# USSD, Cell C Mobile App and Cell C Web Portal. Only the 30-day base (standard) data bundles can be rolled over, subject to customers purchasing a new base bundle before expiry of the existing one.

2.1.3.6. MTN Personalised Social Bundles

MTN filed its new tailor-made Personalised Social Bundles with the Authority on 03 June 2019 to launch in the market on 13 June 2019. The plan offers prepaid customers WhatsApp, Twitter, Facebook, YouTube and Instagram data bundles varying from 50MB to 3GB. The bundles are available as daily, weekly and monthly data and are available to customers according to customer usage behavior patterns, affordability and preference. The bundles are available for purchase to prepaid customers only.

2.1.3.7. MTN Open Market Social Bundles

MTN’s Social Bundles were initially introduced in the market on 01 December 2017. Following the last amendment filed on 18 October 2018, the operator filed additional Open Market Social Bundles with the Authority on 03 June 2019. The new bundles comprise monthly Twitter and Instagram bundles, as shown in table 13 below.

Table 13: MTN Open Market Social Bundles

Bundle Offer	Validity	Tariff
MTN Social Twitter-Monthly-1.5GB	Monthly	R 50
MTN Social Instagram-Monthly-1GB	Monthly	R 50

Source: ICASA Database based on Tariff Notifications

It is worth noting that the bundles were made available to selected customers for the first three months after launching and are now available to all prepaid customers. The additional Open Market Social Bundles were introduced in the market on 12 June 2019.

2.1.3.8. MTN Add-on Youth Snack Bundles

As part of the youth-targeting campaign, MTN filed its promotional Add-on Youth Snack Bundles with the Authority on 13 June 2019 which was launched in the market on 25 June 2019 and is available in the market until further notice. The promotional offer is only available to youth customers of ages 18-24 years, subscribed to the MTN Youth Pulse price plan.

Customers are offered 500MB data bundles for different social media platforms to use for an hour for only R 5, as shown in table 14 below.

Table 14: MTN Add-On Youth Snack Bundles Promotional Offer

Y'th Bundles	Social Snack pack Data	Validity Period	Subscription Fee (VAT Incl.)
Y'th add-on Snack WhatsApp	500MB	1 hour	R 5
Y'th add-on Snack Instagram and Facebook	500MB	1 hour	R 5
Y'th add-on Snack YouTube	500MB	1 hour	R 5
Y'th add-on Snack Twitter	500MB	1 hour	R 5
Y'th add-on Snack Social Pass	500MB	1 hour	R 5

Source: ICASA Database based on Tariff Notifications

Depending on the bundles that customers opt for, they will have access to either WhatsApp, Twitter, Facebook and Instagram, or YouTube. The Youth Add-On Snack Social Pass bundle on the other hand, enables access to all the aforementioned social media platforms. Youth customers benefit from the low effective rates (R 0.01/MB), when they purchase the 500MB data for R 5. However, the bundles cannot be transferred nor rolled over. The promotional offer is in the market until further notice.

2.1.4. Changes to Terms and Conditions Concerning Data Bundle Roll Over and Transfer Services

In response to the End-User and Subscriber Service Charter Second Amendment Regulations 2019, licensees filed revised terms and condition to incorporate new regulatory requirements such as that of data roll over and transfer of data. Prominent changes to the Regulations included the obligation for the licensees to make provisions for end-users to be able to roll over and transfer data, either

terminate internet services and not permit any OOB data usage by an end-user in a case of depletion of data or allow continued data usage at the in-bundle rate upon depletion of a data bundle and sending data usage depletion notifications when data reaches 50%, 80% and 100% depletion levels. Thus, this sub-section focuses on the amendments to the data roll over and transfer services' terms and conditions filed by licensees in the period under review.

2.1.4.1. Vodacom Roll Over and Transfer Services

Vodacom initially filed its terms and conditions for data roll over and transfer services on 14 February 2019. The operator followed up with an amendments on 27 February 2019 and 30 April 2019, following the Authority's correspondence to the licensee regarding what it deemed as potentially excessive service charges for the roll-over and transfer of data.

The amendments were done to eliminate charges for data transfer and roll over services i.e. Vodacom does not charge for roll over of unused data. However, to qualify for data roll over, customers are required to purchase an additional data bundle of equivalent validity period and size (or greater) prior the expiry of the existing/initial data bundle. The terms and conditions applicable to data transfer can be found on the operator's website⁸. Table 15 below shows the charges initially notified to the Authority for the data transfer service. Vodacom has subsequently made amendment which resulted in the charges not being implemented i.e. it now provides for the transfer of unused⁹ data at no fee to its customers⁹.

Table 15: Vodacom Data Transfer Service Charges

Validity Period	Data Volume	Service Fee (initial filing)	Current Service Fee (first amendment)	Current Service Fee (second amendment)
Hourly + At least 1 Day	50MB	R 5	Free	Free
	100MB	R 12	R 3	Free
	250MB	R 19	R 5	Free
	500MB	R 29	R 10	Free
Hourly	1GB	-	R 10	Free
At least 1 Day	1GB	R 49	R 20	Free

Source: ICASA Database based on Tariff Notifications

⁸ Available on: <<https://www.vodacom.co.za/vodacom/terms/data-bundle-terms/data-transfer>> Accessed on 02 August 2019.

⁹ As per letter received from Vodacom on 28 August 2019.

2.1.4.2. Cell C Data Roll Over Service

Cell C filed its data roll over service charges with the Authority on 01 March 2019. The charges vary according to the volume of data one wishes to transfer and the validity period thereof. Table 16 below shows prices charged for each megabyte on the volume of data that a customer rolls-over. For example, a Cell C customer that rolls over a volume of 550MB data with a 30-day validity period is charged R 0.03 per MB for the roll over service, incurring a total cost of R 16.50 (i.e. R 0.03/MB * 550MB = R 16.50).

Table 16: Cell C Data Roll Over Service Charges

Data Validity Period	1MB-100MB	101MB-500MB	501MB-3GB	3GB+
1 Day	R 0.02	R 0.01	R 0.01	R 0.01
7 Days	R 0.05	R 0.03	R 0.02	R 0.01
30 Days	R 0.08	R 0.06	R 0.03	R 0.02

Source: ICASA Database based on Tariff Notifications

The above rates are applicable for data roll over and no notification was filed by Cell C regarding data transfer.

2.2. Analysis of Promotional Prepaid Data Tariffs

2.2.1. MTN Double Your Bundle Promotion

MTN filed its Double Your Bundle promotion with the Authority on 23 January 2019, which rewards customers with an additional bundle equivalent to the recharge value. For an example, if customers purchase a monthly 500MB personalised data offer, they will be rewarded with an additional 500MB. The promotion is available to PAYG customers in personalised voice bundle and data bundle purchases, through the *142# USSD code or the MyMTNApp. Bundle offers are in accordance to the customers' spending profiles.

Table 17 below shows the MTN Double Your Bundle data promotional offers.

Table 17: MTN Double Your Bundle Promotion

Data Bundles					
Daily Personalised Offers	Price	Weekly Personalised Offers	Price	Monthly Personalised Offers	Price
250MB + 250MB Free	R 5	250MB + 250MB Free	R 15	500MB + 500MB Free	R 25
Buy 25MB and get 25MB Free	R 2	100MB + 100MB Free	R 10	250MB + 250MB Free	R 29
50MB + 50MB Free	R 5	250MB + 250MB Free	R 20	400MB + 400MB Free	R 39
100MB + 100MB Free	R 7	300MB + 300MB Free	R 30	500MB + 500MB Free	R 49
150MB + 150MB Free	R 10	500MB + 500MB Free	R 40	500MB + 500MB Free	R 69
250MB + 250MB Free	R 15	1GB + 1GB Free	R 70	1GB and get 1GB Free	R 99
300MB + 300MB Free	R 20	1.5GB + 1.5GB Free	R 90	1.5GB + 1.5GB Free	R 149
500MB + 500MB Free	R 30	2GB + 2GB Free	R 110	3GB + 3GB Free	R 299
1GB + 1GB Free	R 50	3GB + 3GB Free	R 150	5GB + 5GB Free	R 349
2.5GB + 2.5GB Free	R 100	5GB + 5GB Free	R 180	10GB + 10GB Free	R 450
-	-	6GB + 6GB Free	R 200	15GB and get 15GB Free	R 540
-	-	10GB + 10GB Free	R 300	24GB + 24GB Free	R 600
-	-	20GB + 20GB Free	R 600	36GB + 36GB Free	R 900
-	-	-	-	100GB + 100GB Free	R 1 800

Source: ICASA Database based on Tariff Notifications

The promotion was introduced in the market on 01 February 2019.

2.2.2. Telkom Mobile Promotional IDOLS Bundles

On 28 June 2019, Telkom Mobile filed a notification with the Authority regarding its promotional IDOLS Bundles which launched on 05 July 2019 and is expected to be in the market until 22 November 2019. Telkom's aim in introducing the IDOLS Bundles is to retain existing customers, whilst trying to attract prospective customers during the 2019 DSTV IDOLS season. The validity periods for the bundles are 1 day (daily), weekend as shown in table 18, 18 days and monthly bundles on FreeMe plan as shown in table 19.

Table 18: Telkom Mobile Promotional IDOLS Daily and Weekend Data Bundles

Bundle size	Price
IDOLS Daily Data Bundle	
150MB	R 10
IDOLS Weekend Data Bundles	
100MB	R 10
200MB	R 19
500MB	R 29

1GB	R 49
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Source: ICASA Database based on Tariff Notifications

Table 19: Telkom Mobile Promotional FreeMe Bundles

Bundle size	Price	WhatsApp Bundle	On-net minutes	SMS	Validity period
150MB	R 29	150MB	150	50	14 Days
250MB	R 39	250MB	250	50	14 Days
500MB	R 70	500MB	300	100	31 Days/61 Days data
1GB	R 100	500MB	300	100	31 Days/61 Days data

Source: ICASA Database based on Tariff Notifications

Table 19 above shows that 500MB and 1GB promotional FreeMe data bundles purchased in this IDOLS promotion, have a validity period of 61 days.

2.3. Regulatory interventions underway to address high data charges

2.3.1. Market inquiry into the broadband services markets

The purpose of the broadband market Inquiry is to identify broadband markets or market segments susceptible to *ex ante* regulation and immediately conduct market reviews in respect of those markets.

The Inquiry which is being conducted in terms of section 4B of the ICASA Act read with section 67(4) of the ECA is aimed at addressing the concerns raised by various stakeholders regarding data prices, and to respond to the final policy direction on effective competition in broadband markets and the reduction of data costs.

The Inquiry is currently at the stakeholder engagement phase, with the Authority having published a questionnaire on its website on 16 November 2018 and has received written responses to this request for information from relevant stakeholders. The initial deadline for submission of information was 11 March 2019, which the Authority extended to 29 March 2019. After receiving the written responses, the Authority held one-on-one meetings with licensees between 17-29 April 2019 with the aim of seeking further clarity in the submissions received. On

the 03 May 2019 the Authority sent out questions of clarity and request for additional information to licensees to which it received responses on 24 May 2019.

Further questions of clarity and request for outstanding information were sent to licensees on 16 July 2019. The Authority has analysed the information and published a Discussion Document on 02 December 2019 to solicit stakeholder comments.

2.3.2. Monitoring of Implementation of EUSSC Regulations

The End-User and Subscriber Service Charter (EUSSC) Second Amendment Regulations, 2019 came into full effect on 12 April 2019. Since coming into effect the Authority has been monitoring implementation of the Regulations and have proactively engaged respective licensees to:

- ascertain how the Regulations are being implemented;
- discuss issues of possible non-compliance which relate to data transfer and ability to roll-over of data before it expires;
- discuss customer queries relating to the implementation of the Regulations;
- request additional information regarding implementation and demonstration of such, where necessary; and
- address any possible issues of misinterpretation of the Regulations in order to ensure that the Authority's intention and interpretation is re-emphasised to ensure that where possible non-compliance exists, it is addressed at the early stages of implementation of the Regulations.

At this stage the engagements and the monitoring of implementation is on-going. The Authority has embarked on this pragmatic approach, in order to mitigate and address any possible issues of non-compliance.

2.4. Analysis of Standard Prepaid Voice Tariffs

Standard prepaid voice tariffs are segregated into three types, namely flat-rate¹⁰, dynamic¹¹ and on-net¹² tariffs. In the period under review the Authority received seven standard prepaid voice tariff notifications, two from MTN and five from Vodacom. MTN introduced two new standard prepaid price plans, namely the MTN Youth Pulse and MTN Inflow plans. Vodacom filed amendments of standard prepaid voice plans as it increased Power Bonus, Siyakha, NXT LVL, Anytime Per Second and Daily Free Calls prepaid price plans by R 0.02. The changes in these price plans are categorised and discussed in detail in the next sub-section.

2.4.1. Flat-rate tariffs

The Authority received five flat-rate tariff notifications in the period under review and during this period Vodacom increased prices of Daily free Calls, Anytime per second and Power Bonus price plans by R 0.02. Power Bonus tariff plan increased from R 1.53 to R 1.55 per minute while Anytime per second tariff plans increased from R 1.23 to R 1.25 per minute (billed per second). Similarly, MTN introduced a new default price plan for prepaid customers called MTN Inflow, with a flat-rate of R 0.99 per minute. Figure 6 below depicts the lowest flat-rate tariffs charged by Cell C, Vodacom, MTN and Telkom Mobile.

As previously analysed in the 2018/19FY Q4 Bi-Annual Tariff Analysis Report¹³, Cell C 66c remains the lowest price plan in the market charging R 0.66 per minute followed by Vodacom 79c which charges R 0.79 per minute. MTN Inflow (new default price plan) is the third lowest flat-rate price plan, charging R 0.99 per minute, followed by Telkom More which charges R 1.90 per minute (billed per second).

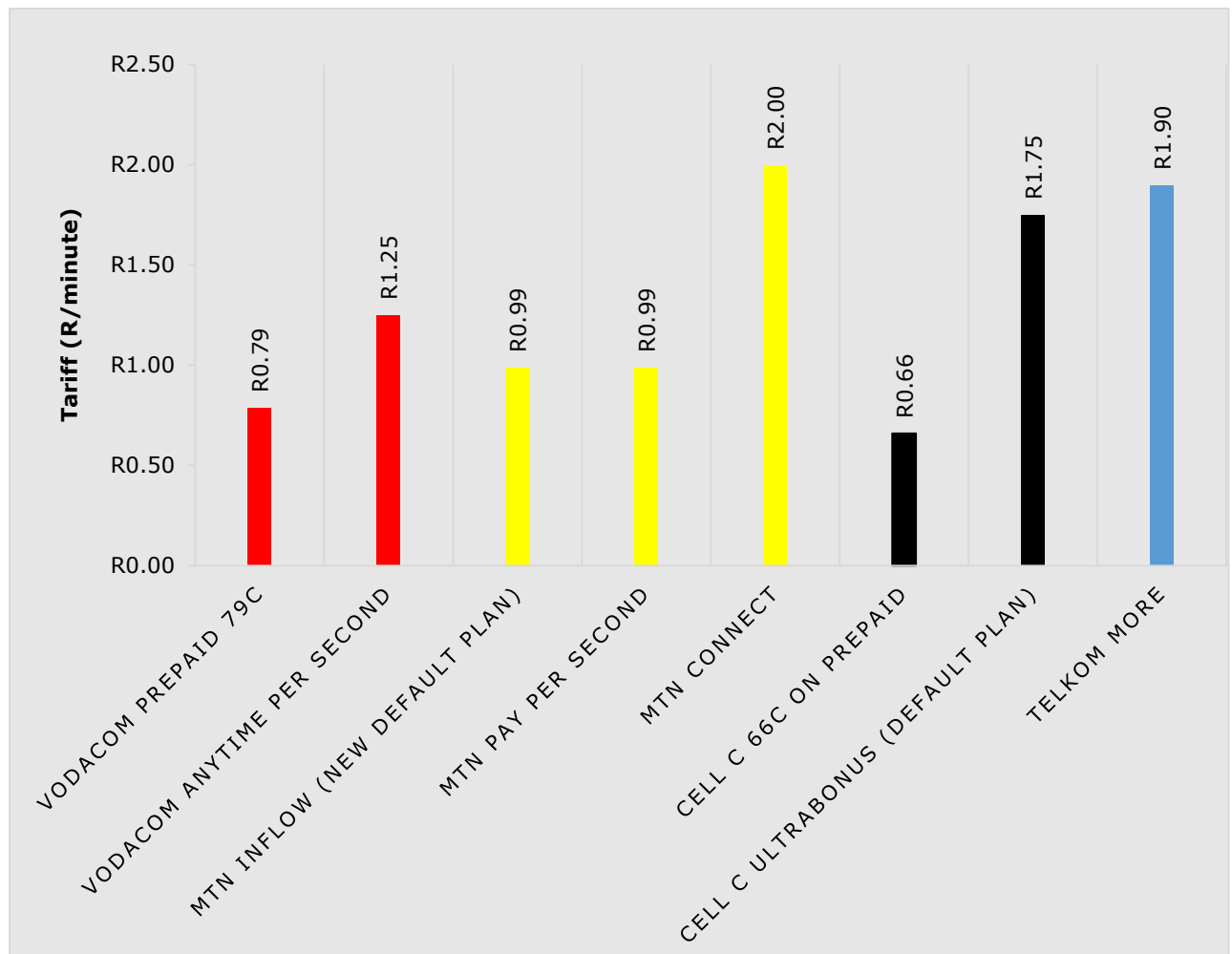
¹⁰ Flat-rate tariffs are price plans that charge the same retail rate for calls to any subscriber this means there is no on-net and off-net price differentials on flat-rate tariff plans.

¹¹ Dynamic tariffs are based on variable pricing of minutes that is based on traffic, network capacity, time of the day and customer segment (value based), as defined by Dorgham, 2015.

¹² On-net focused tariffs give subscribers substantial discounts for calling other subscribers on the same network.

¹³ Pages 12-14, available on ICASA's website < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-jul-dec-2018>> Accessed on 15 July 2019

Figure 6: Flat-rates per minute (billed per second)



Source: ICASA Database based on Tariff Notifications

Furthermore, taking the Cell C 66c as the base price since it is the lowest standard tariff plan in the market, customers on Vodacom Prepaid 79c pay 19.7% more while customers on MTN Inflow pay 50% more. Customers on Telkom More pay approximately 187.9% more per minute when compared to customers who are on Cell C 66c price plan.

2.4.2. On-net focused tariffs

These are prepaid price plans that give subscribers discounts and other incentives when calling subscribers on the same network. During the period under review the Authority received one on-net tariff notification from Vodacom and this notification was filed on 08 March 2019. Vodacom amended the price of the Daily

Free Calls, increasing the tariff plan’s flat-rate by R 0.02 (from R 1.23 to R 1.25). It is worth noting that the terms and conditions of this tariff plan did not change.

In addition, other price plans filed by Vodacom, namely Power Bonus, NXT LVL and Siyakha, which offer on-net benefits such as free airtime and discounts on sponsored calls, also experienced a price increase of R 0.02 (from R 1.53 to R 1.55 voice call per minute), as per the notification filed on 08 March 2019. Telkom Mobile Sim-Sonke tariff plan remains the lowest tariff plan in the market, charging R 0.30 per minute for on-net calls and R 0.76 per minute for Telkom to other networks. Therefore, customers on Telkom Mobile Sim-Sonke are charged 153.3% more for making calls to other networks.

2.4.2.1. Analysis of standard of voice bundles billed per minute

2.4.2.1.1. Vodacom Voice bundles

During the period under preview the Authority received five Voice bundles amendments. On 20 February 2019, Vodacom amended Power Hour, Chat for 30 and Night Shift promotions and converted them into permanent (standard) products, while the terms and conditions of these products did not change. Chat for 30 was further amended by the operator on 08 March 2019, increasing the price by R 0.40 for the voice tariff plan from R 10.10 to R 10.50. Vodacom also increased the price of Chat Now products, with the Chat Now 10, Chat Now 60 and Chat Combo now priced at R 3.20 (R 0.10 increase), R 9.50 (R 0.40 price increase) R 17.80 (R 0.60 price increase), respectively.

In addition, on 20 February 2019 Vodacom introduced new Vodacom to Vodacom (VC-VC) Just 4 You bundles and further introduced new Any Network Any Time (ANAT) Just 4 You bundles on 06 May 2019. The Just 4 You voice bundle allocations and respective prices are shown in table 20 below.

Table 20: New Vodacom Just 4 You voice bundles

Voice bundle allocated	Allocation	Price
15 minutes for 1 day	15 ANAT	R 5
60 minutes for 1 day	60 ANAT	R 10

Voice bundle allocated	Allocation	Price
30 minutes for 7 days	30 ANAT	R 19
60 minutes for 7 days	60 ANAT	R 29
60 minutes per day for 5 days	60 VC-VC	R 40
60 minutes per day for 4 days	60 VC-VC	R 32
60 minutes per day for 3 days	60 VC-VC	R 24
30 minutes per day for 3 days	60 VC-VC	R 20
60 minutes per day for 2 days	60 VC-VC	R 16
30 minutes for 1 day	30 VC-VC	R 6
20 minutes for 1 day	20 VC-VC	R 5
15 minutes for 1 day	15 VC-VC	R 4
10 minutes for 1 day	10 VC-VC	R 3
10 minutes for 2 days	10 VC-VC	R 4
5 minutes for 1 day	5 VC-VC	R 2.60
3 minutes for 1 day	3 VC-VC	R 2
2 minutes for 1 day	2 VC-VC	R 1.60
10 minutes to use now	10 VC-VC	R 2.50

Source: ICASA Database based on Tariff Notifications

2.4.2.1.2. MTN PAYG Night Voice Bundles

On 21 February 2019 MTN introduced new weekly on-net night voice bundle and monthly 60 minutes night voice bundle to its prepaid customers, these new night voice bundles were effected on 05 March 2019. Similarly, on 25 March 2019, MTN further introduced on-net daily, weekly, monthly and uncapped monthly night voice bundles which were effective 05 April 2019. The night voice bundles allow customers to make on-net calls between 12h00 am to 05h00 am.

Table 21 below show MTN PAYG bundle allocation, validity period and price.

Table 21: MTN PAYG Night Voice Bundles

PAYG Night Voice Description	Bundle Allocation	Validity	Price
Daily 60 Minute Night Voice Bundle (once-off)	60 minutes	1 day	R 3
Weekly Night Voice Bundle	60 minutes per day for 7 days	7 days	R 5
Monthly 60 Minutes Night Voice Bundle	60 minutes per day for 7 days	30 days	R 15
Monthly Uncapped Night Voice Bundle	300 minutes per day over 30 days	30 days	R 30

Source: ICASA Database based on Tariff Notifications

The MTN PAYG Night Voice Bundle is similar to Vodacom's Night shift and table 22 below provides a comparison between the two tariff plans.

Table 22: Comparison of MTN PAYG Night Voice Bundles to Vodacom Night Shift Plan

MTN PAYG Night Voice Bundles	Vodacom Night Shift
<ul style="list-style-type: none"> • Available to all prepaid subscribers. 	<ul style="list-style-type: none"> • Excludes Daily Free calls and Prepaid 79c subscribers.
<ul style="list-style-type: none"> • On-net voice calls 12h00am to 5h00 am. 	<ul style="list-style-type: none"> • On-net voice calls 12h00am to 5h00 am.
<ul style="list-style-type: none"> • Customers need to purchase night voice bundles; <ul style="list-style-type: none"> ➤ 60 minutes voice bundles cost R 3 and are valid for one day ➤ Uncapped night voice bundles for 30 days cost R 30, with a limit of 300 minutes per day. 	<ul style="list-style-type: none"> • Customers are required to do a single recharge of R12 or more to receive free 60 minutes on net calls from daily for 7 days.

Source: ICASA Database based on Tariff Notifications

2.4.3. Dynamic Tariffs

Dorgham (2015) defines dynamic tariffs as those based on variable pricing of minutes that is based on traffic, network capacity, time of the day and customer segment (value based)¹⁴. The Authority received two dynamic tariff plans, with one being from Vodacom namely the NXT LVL, of which its voice rate increased by R 0.02 or 1.3% from R 1.53 to R 1.55. The second dynamic price plan filing was made by MTN who introduced the MTN Youth Pulse price plan. This is a standard tariff plan which is designed for 18 to 24 year olds and it charges a voice rate of R 0.79 per minute for calls across all networks.

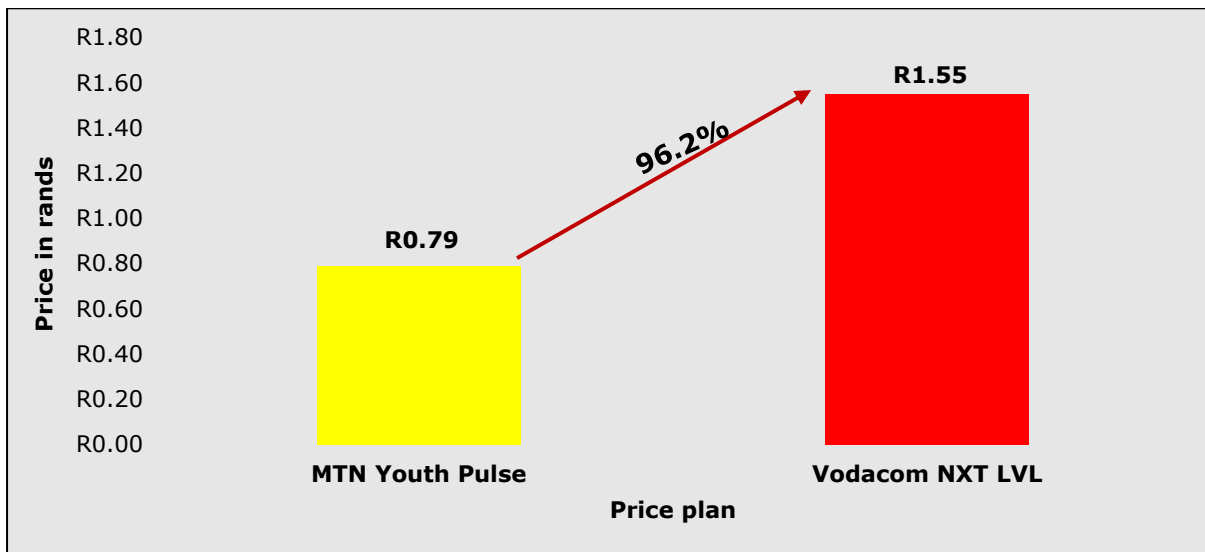
The new MTN Youth Pulse price plan is similar to Vodacom’s NXT LVL since the target market for both price plans is youth (aged between 18-24 years old).

Figure 7 below compares the voice rates that are charged on MTN Youth Pulse and Vodacom NXT LVL. It is depicted in the graph below that customers on Vodacom NXT LVL pay approximately 96.2% more per minute on a voice call than customers

¹⁴ Kholoud Dorgham, M.S.2015. ResearchGate. [Online] available at: <
https://www.researchgate.net/publication/277669260_A_Novel_Dynamic_Pricing_Model_for_the_Telecommunications_Industry> [Accessed 17 July 2019]

who are on MTN Youth Pulse.

Figure 7: Comparison of the MTN Youth Pulse price plan with the Vodacom NXT LVL



Source: ICASA Database based on Tariff Notifications

2.4.4. Tariff Plan Changes- Standard Prepaid Voice Tariffs

This section provides a 2018/19FY Q4¹⁵ to 2019/20FY Q2 tariff comparison to indicate price changes or new tariff plans offered since the last published Bi-Annual Tariff Analysis report¹⁶.

In the period under review, Vodacom increased the prices across its flat-rate, on-net and dynamic tariff plans as per the notification filed on 08 March 2019. MTN introduced a new flat-rate tariff plan called the MTN Inflow Price Plan, filed with the Authority on 03 April 2019 and a dynamic tariff plan called MTN Youth Pulse filed on 17 May 2019. The tariff changes and the new tariff plans that were offered during this period are discussed further in the sub-sections below.

¹⁵ Quarter 4 (01 July-December 2018) is when the previous report was produced, which was published on 03 April 2019 and Quarter 2 (01 January-30 June 2019) is when this report was produced.

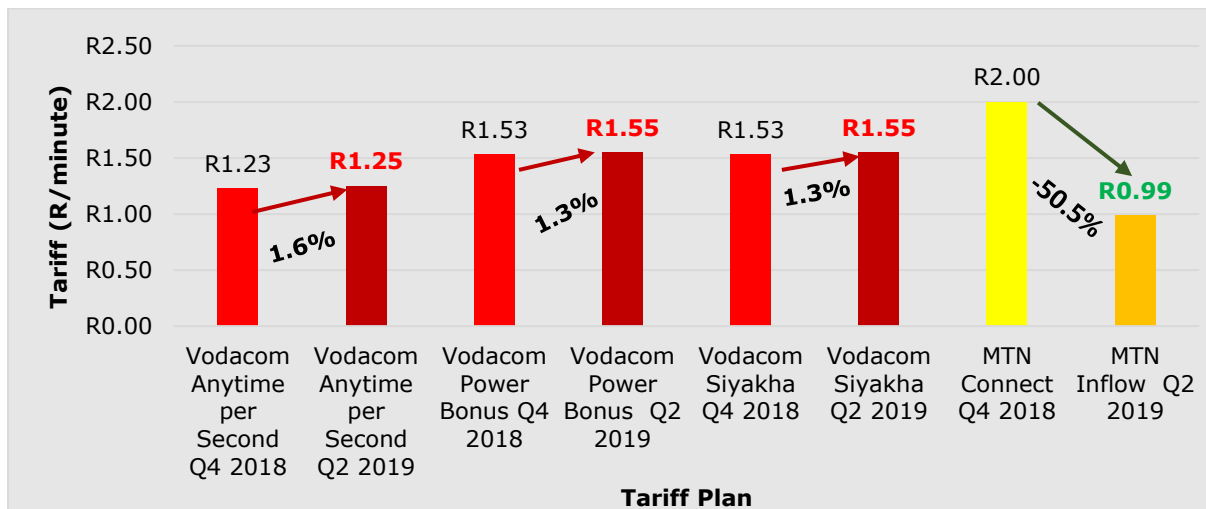
¹⁶ Available at: <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-jul-dec-2018>

2.4.4.1 Flat-rate tariffs

Since the 2018/19FY Q2 ¹⁷ Tariff Analysis report review period, Vodacom increased the price of its flat-rate tariffs Daily free Calls, Anytime per second and Power Bonus price by R 0.02. In the same period, MTN introduced a new default tariff Plan called MTN Inflow which charges a flat voice rate of R 0.99 per minute.

Changes in standard flat-rate prepaid voice tariff plans are depicted in figure 8 below. Vodacom filed its notification to increase voice rates for the above mentioned tariff plans with the Authority on 08 March 2019. The price of Vodacom Anytime Per second tariff plan increased by 1.6% (from R 1.23 to R 1.25), Vodacom Power Bonus and Vodacom Siyakha increased by 1.3% (from R 1.53 to R 1.55). MTN's default Inflow price plan was filed with the Authority on 03 April 2019. The operator changed its prepaid price plan changed from MTN connect (charging R 2) to MTN Inflow (charging R 0.99), the changes in MTN default price plan led to a tariff decrease of 50.5%.

Figure 8: Q4 2018 Vs Q2 2019 flat-rate tariff plan changes



Source: ICASA Database based on Tariff Notifications

Vodacom attributes the marginal price increases for the tariff plans shown in Figure 8, as a strategy to mitigate against revenue dilution as a result of the End-

¹⁷ Quarter 2 (Q2) of the Authority's Financial Year which is July -September, annually and in this case the previous Q2 is July-September 2018.

user and Subscriber Service Charter Amendment Regulations which came into full effect on 12 April 2019.

2.4.4.2 On-net tariffs

Vodacom filed a tariff change on 08 March 2019 increasing the price of Vodacom Daily Free calls by 1.6% from R 1.23 to R 1.25.

2.4.4.3 Dynamic tariffs

MTN filed a new standard dynamic voice tariff plan on 17 May 2019 called Youth Pulse, designed for youth between the age of 18-24 years old. Youth Pulse subscribers are charged a flat-rate of R 0.79 per minute.

2.5. Analysis of Promotional Prepaid Voice Tariffs

This section analyses the promotional prepaid voice tariffs which were filed during the period under review. The promotional tariff plans are generally short term in nature and their validity period range from one day up to 6 months.

2.5.1. MTN Double Your Bundle Promotion

MTN filed its Double Your Bundle promotion with the Authority on 23 January 2019. The promotion rewards customers with an additional bundle equivalent to the recharge value. For an example, if customers purchase a monthly 75 voice minutes offer, they will be rewarded with an additional 75 voice minutes. The promotion is available to PAYG customers in personalised voice bundle and data bundle purchases, through the *142# USSD code or the MyMTNApp. Bundle offers are in accordance to the customers' spending profiles.

Table 23 below shows the MTN Double Your Bundle voice promotional offers.

Table 23: MTN Double Your Bundle Promotion

Daily personalised offers	Price	Weekly personalised offers	Price	Monthly personalised offers	Price
20 minutes + 20 minutes Free	R 5	120 minutes + 120 minutes Free	R 10	100 minutes + 100 minutes Free	R 10
7 minutes + 7 minutes Free	R 2	15 minutes + 15 minutes Free	R 5	40 minutes + 40 minutes Free	R 10
10 minutes + 10 minutes Free	R 3	30 minutes + 30 minutes Free	R 10	60 minutes + 60 minutes Free	R 15
15 minutes + 15 minutes Free	R 5	50 minutes + 50 minutes Free	R 15	75 minutes + 75 minutes Free	R 20
3 minutes + 30 minutes Free	R 7	75 minutes + 75 minutes Free	R 20	100min + 100min Free	R 25
35 minutes + 35 minutes Free	R 8	100 minutes + 100 minutes Free	R 25	125 minutes + 125 minutes Free	R 30
40 minutes + 40 minutes Free	R 10	125 minutes + 125 minutes Free	R 30	150 minutes + 150 minutes Free	R 40
50 minutes + 50 minutes Free	R 11	150 minutes + 150 minutes Free	R 35	200 minutes + 200 minutes Free	R 50
60 minutes + 60 minutes Free	R 12	200 minutes + 200 minutes Free	R 40	250 minutes + 250 minutes Free	R 60
75 minutes + 75 minutes Free	R 15	250 minutes + 250 minutes Free	R 45	350 minutes + 350 minutes Free	R 90
120 minutes + 120 minutes Free	R 19	350 minutes + 350 minutes Free	R 60	400 minutes + 400 minutes Free	R 100
200 minutes + 200 minutes Free	R 30	500 minutes + 500 minutes Free	R 90	500 minutes + 500 minutes Free	R 120
300 minutes + 300 minutes Free	R 39	600 minutes + 600 minutes Free	R 120	600 minutes + 600 minutes Free	R 130
500 minutes + 500 minutes Free	R 79	1000 minutes + 1000 minutes Free	R 230	750 minutes + 750 minutes Free	R 150
-	-	-	-	1000 minutes + 1000 minutes Free	R 180
-	-	-	-	1500 minutes + 1500 minutes Free	R 270
-	-	-	-	2200 minutes + 2200 minutes Free	R 360
-	-	-	-	4000 minutes + 4000 minutes Free	R 750

Source: ICASA Database based on Tariff Notifications

It should be noted that the voice bundles are applicable to local on-net calls only. The promotion was introduced in the market on 01 February 2019.

2.5.2. MTN's Prepaid MyVoice All-Net Bundles

MTN filed an amendment to its All-Net Bundles which are offered under MyMTNOffer suite (i.e. personalised voice bundles) with the Authority on 15 February 2019 following a preceding amendment filed on 05 December 2018. The amendment entailed adding new bundles and making changes to previous all-net

voice bundles. The voice bundles are personalised bundles based on the customers' usage and spending patterns and are available through the *142# USSD and the MyMTNApp options.

Table 24 below shows a sample of the all-net voice bundles offered by MTN and their respective prices. More information pertaining to the MTN Prepaid MyVoice All-Net Bundles can be found on the operator's website¹⁸.

Table 24: Sample of MTN All-Net Bundles offered

PAYG MyVoiceOffer Voice Bundle (All-Net)	Validity	Bundle price (Inc. VAT)
Weekly 10 minutes	1 Week	R 5
Weekly 10 minutes	1 Week	R 6
Weekly 25 minutes	1 Week	R 11
Weekly 25 minutes	1 Week	R 15
Weekly 60 minutes	1 Week	R 30
Weekly 60 minutes	1 Week	R 32
Weekly 100 minutes	1 Week	R 45
Weekly 100 minutes	1 Week	R 50
Monthly 25 minutes	1 Month	R 10
Monthly 25 minutes	1 Month	R 13
Monthly 55 minutes	1 Month	R 22
Monthly 100 minutes	1 Month	R 45
Monthly 500 minutes	1 Month	R 160

Source: ICASA database based on Tariff Notifications

The voice bundles are only applicable to local calls and the amendment came into effect on 26 February 2019 and the promotional offer is in the market until further notice.

2.6. Analysis of Integrated Prepaid Tariff Plans

This section focuses on the analysis of the standard and promotional prepaid integrated bundles filed with the Authority during the period under review. Integrated bundles are a combination of voice, data and/or SMS bundles sold as a unit package to customers. The Authority has realised an increase in such product offerings in the market has taken an initiative to include the analysis thereof in the report.

¹⁸ Available on: <<https://www.mtn.co.za/Pages/Termsandconditions.aspx?pageID=881>> Accessed on 31 July 2019.

2.6.1. Analysis of Standard Prepaid Integrated Bundles

2.6.1.1. Vodacom Power Hour + WhatsApp Bundles

Vodacom filed its Power Hour + WhatsApp Bundles offer with the Authority on 24 January 2019, which was then introduced in the market on 05 February 2019. The integrated bundles include a 200MB WhatsApp bundle and a 60 minutes on-net voice bundle, price at R 11 with a 1-day validity period. The bundle is only available to prepaid (with the exception of customers on the Prepaid 79c plan) and hybrid customers and its purchase is unlimited and can be done any time of the day, and if purchased after 22h00, its validity is extended to 23h25 of the following day. Other terms and conditions¹⁹ of this promotion can be found on the operator's website.

2.6.1.2. Vodacom Power Pack

Following the initial filing on 08 October 2018, Vodacom filed amendments of its Power Pack price plan on 21 February 2019 and 04 June 2019. The first amendment entailed the reduction of the OOB data rate from R 0.99 per MB to R 0.29 per MB, the introduction of new recurring integrated bundles shown in the table below and the free funeral cover and movies benefit. Prominent changes on the 04 June 2019 amendment include the increase of the flat-rate from R 1.53 per minute to R 1.55 per minute and the introduction of new once-off and recurring Power Bundles. The Vodacom Power Bundles were initially exclusive to the Power Pack price plan, however as at the 04 June 2019 notification, the bundles are now available to all prepaid and hybrid customers. The new Vodacom Power Bundles are analysed on subsection 2.6.1.6 below.

Table 25 below shows all the Power Pack bundles with the amendments that occurred in the period under review.

¹⁹ Available on: < <https://www.vodacom.co.za/vodacom/terms/data-bundle-terms/power-hour-and-whatsapp-bundle> > Accessed on: 30 July 2019

Table 25: Vodacom Power Pack Bundles

Bundle Allocation	Price
Recurring bundles	
Valid for 7 days, 75MB, 15 on-net minutes, 150MB WhatsApp Bundle	R 29
Valid for 7 days, 350MB, 20 on-net minutes, 150MB WhatsApp Bundle	R 59
Valid for 30 days, 325MB, 20 on-net minutes, 325MB night owl, 1024MB WhatsApp Bundle	R 99
Valid for 30 days, 1100MB, 60 on-net minutes, 1100MB night owl, 1024MB WhatsApp Bundle	R 199
Valid for 30 days, 2500MB, 100 on-net minutes, 2500MB night owl 1024MB WhatsApp Bundle	R 299
Promo bundle Valid for 30 days, 650MB, 40 on-net minutes, 650MB night owl, 1024MB WhatsApp Bundle	R 99
21 February 2019 Amendments	
Recurring Bundles	
Valid for 1 day, 15MB, 5 on-net minutes	R 5
Valid for 1 day, 30MB, 10 on-net minutes	R 8
Valid for 1 day, 45MB, 15 on-net minutes, 30MB WhatsApp Bundle	R 12
04 June 2019 Amendments	
Recurring Bundles	
Valid for 30 days, 325MB, 20 on-net minutes, 325MB night owl, 1024MB WhatsApp Bundle	R 149
Valid for 30 days, 1600MB, 80 on-net minutes, 1600MB night owl, 1024MB WhatsApp Bundle	R 249
Once-off bundles	
Valid for 1 day, 15MB, 5 on-net minutes	R 5
Valid for 1 day, 30MB, 10 on-net minutes	R 8
Valid for 1 day, 45MB, 15 on-net minutes, 30MB WhatsApp Bundle	R 12
Valid for 7 days, 75MB, 15 minutes, 150MB WhatsApp Bundle	R 29
Valid for 7 days, 350MB, 20 on-net minutes, 150MB WhatsApp Bundle	R 59
Valid for 30 days, 650MB, 40 on-net minutes, 650MB night owl, 1024MB WhatsApp Bundle	R 99
Valid for 30 days, 325MB, 20 on-net minutes, 325MB night owl, 1024MB WhatsApp Bundle	R 149
Valid for 30 days, 1100MB, 60 on-net minutes, 1100MB night owl, 1024MB WhatsApp Bundle	R 199
Valid for 30 days, 1600MB, 80 on-net minutes, 1600MB night owl, 1024MB WhatsApp Bundle	R 249
Valid for 30 days, 2500MB, 100 on-net minutes, 2500MB night owl, 1024MB WhatsApp Bundle	R 299
Promo bundle Valid for 30 days, 650MB, 40 on-net minutes, 650MB night owl, 1024MB WhatsApp Bundle	R 99

Source: ICASA Database based on Tariff Notifications

Upon every bundle purchase of R 59 or more, customers qualify for a free funeral cover valued at R 5 000. Customers need to be spending a minimum of R 50 on Power Bundles to retain their cover. Customers also qualify for a minimum of 1-month access to Vodacom's Video Play (free movie access) upon every purchase of a 7-day or 30-day Power Bundle. The details of the funeral cover and free movies access are found in the terms and conditions of the plan²⁰.

²⁰ Available on: <<https://www.vodacom.co.za/vodacom/terms/power-pack>> Accessed on 30 July 2019

On standard rates, a Vodacom customer would get 1GB WhatsApp data and 500MB of standard data valid for 30 days at price of R 35 and R 100 (R 135 in total), respectively. The introduction of Power Bundles has seen customers receiving 650MB, 40 voice minutes, 650MB night owl data and 1024MB WhatsApp bundles for R 99. Thus, the introduction of the Power Bundles benefits the customers by offering integrated bundles with reduced in-bundle rates.

2.6.1.3. Cell C R 29 SIM (Mass Market SIM)

Cell C initially filed its Mass Market SIM with the Authority on 26 March 2019, intending to launch it on 08 April 2019. However, prior to launching the product, the operator filed an amendment on 04 April 2019, changing the name of the product to Cell C R 29 SIM, the terms and conditions and the launch date. The Cell C R 29 SIM was introduced in the market on 12 April 2019.

Table 26 below details what was initially offered and what is currently in the market.

Table 26: Cell C R 29 SIM (Mass Market SIM)

Per month bundle allocation	Validity	Allocation
Mass Market SIM		
30 All-net minutes	3 Days	5 Months
30 On-net minutes	3 Days	5 Months
100MB Data	3 Days	5 Months
Cell C R 29 SIM		
30 All-net minutes	7 Days	3 Months
30 On-net minutes	7 Days	3 Months
100MB Data	7 Days	3 Months

Source: ICASA database based on Tariff Notifications

The SIM card initially included 30 local all-net minutes per month, 30 on-net minutes per month and 100MB per month. The bundles were allocated for the first 5 months of obtaining the SIM card and had a 3-day validity period for each month, for a price of R 29. Cell C amended offering such that it now offers the same bundles valid for 7 days for each month, allocated for 3 months at a price of R 29. Upon activation of the Cell C R 29 SIM, customers are defaulted on the UltraBonus price plan. It should be noted that customers cannot roll over and also cannot transfer the inclusive data bundle.

2.6.1.4. MTN PAYG Super Power Bundles

The MTN PAYG Super Power Bundles were filed with the Authority on 03 May 2019 and introduced in the market on 15 May 2019. The bundles comprise of daily, weekly voice and integrated bundles, exclusively available to prepaid customers. Customers can purchase the bundles at any time of the day, but, they can only be use between 06h00 and 18h00. MTN’s aim of introducing these bundles was to improve customer experience offering prepaid customers affordable on-net voice bundles. It is worth noting that on 01 July 2019, MTN filed an amendment on its Super Power Bundles offering, introducing new tailor-made daily integrated bundles. The new integrated bundles are available on the MyMTNOffers channel and are based on the customers’ spending profiles.

Table 27 below shows the packages of the Super Power Bundles, their validity periods and respective prices as per the filings received on 03 May 2019 and 01 July 2019.

Table 27: MTN PAYG Super Power Bundles

On-Net Minutes + Data Bundles	Validity Availability to use	Inclusive On-net min + MB	Price (VAT Incl.)
MTN Daily 60min Super Power bundle	Daily/ (06h00-18h00)	60 on-net min per day	R 8
MTN Daily 60min + 250MB WhatsApp Super Power bundle	Daily/ (06h00-18h00)	60 on-net min + 250MB WhatsApp per day	R 10
MTN Daily 60min + 1GB WhatsApp Super Power bundle	Daily/ (06h00-18h00)	60 on-net min + 1GB WhatsApp per day	R 11
MTN Daily 60min + 1GB WhatsApp Super Power bundle	Daily/ (06h00-18h00)	60 on-net min + 1GB WhatsApp per day	R 15
MTN Daily 60min + 1GB WhatsApp Super Power bundle	Daily/ (06h00-18h00)	60 on-net min + 1GB WhatsApp per day	R 20
MTN Daily 60min + 1GB WhatsApp Super Power bundle	Daily/ (06h00-18h00)	60 on-net min + 1GB WhatsApp per day	R 25
MTN weekly 60min Super Power bundle	Weekly/ (06h00-18h00)	Weekly/ (06h00-18h00)	R 50
MTN weekly 60min + 250MB Super Power bundle	Weekly/ (06h00-18h00)	60 on net min +250MB WhatsApp per day for 7 days	R 60

Source: ICASA Database based on Tariff Notifications

MTN Super Power Bundles offer 60 on-net voice minutes and 250MB WhatsApp data offer which is priced at R 10 and can be used between 6am and 6pm is similar

to Vodacom’s Power Hour + WhatsApp Bundle²¹ plan which offers 60 on-net voice minutes and 200MB WhatsApp data for R 11 to use from the time of purchase until 23:59pm.

2.6.1.5. MTN Youth Bundles

MTN filed a notification of its new Youth Bundles with the Authority on 17 May 2019 which came into effect on 28 May 2019. The bundles are exclusively for customers between 18 – 24 years of age who have subscribed to the MTN Youth Pulse price plan. In order to subscribe to the Youth Pulse price plan, customers are required to register with their valid identity numbers through USSD codes *411# or *136#, or through the application interface (i.e. MyMTN App).

Table 28 below shows the MTN Youth Bundles packages with their respective validity periods and subscription fees (VAT inclusive).

Table 28: MTN Youth Bundles

Net Minutes + Data Bundles	Validity	Inclusive On-net min + MB	Subscription Fee (Including VAT)
Y'th Daily R 5 Integrated bundle	Daily	7 On-Net minutes + 15MB	R 5
Y'th Daily R 5 Integrated bundle	Daily	5 On-Net minutes + 20MB	R 5
Y'th Daily R 5 Integrated bundle	Daily	3 On-Net minutes + 25MB	R 5
Y'th Daily R 10 Integrated bundle	Daily	30 On-Net minutes + 30MB	R 10
Y'th Daily R 10 Integrated bundle	Daily	20 On-Net minutes + 40MB	R 10
Y'th Daily R 10 Integrated bundle	Daily	15 On-Net minutes + 50MB	R 10
Y'th Weekly R 30 Integrated bundle	Weekly	80 On-Net minutes + 100MB	R 30
Y'th Weekly R 30 Integrated bundle	Weekly	70 On-Net minutes + 125MB	R 30
Y'th Weekly R 30 Integrated bundle	Weekly	60 On-Net minutes + 150MB	R 30
Y'th Weekly R 50 Integrated bundle	Weekly	180 On-Net minutes + 200MB	R 50
Y'th Weekly R 50 Integrated bundle	Weekly	150 On-Net minutes + 250MB	R 50
Y'th Weekly R 50 Integrated bundle	Weekly	120 On-Net minutes + 350MB	R 50
Y'th Monthly R 99 Integrated bundle	Monthly	300 On-Net minutes + 300MB	R 99

²¹ Analysed in 2.6.1.1 above

Net Minutes + Data Bundles	Validity	Inclusive On-net min + MB	Subscription Fee (Including VAT)
Y th Monthly R 99 Integrated bundle	Monthly	150 On-Net minutes + 500MB	R 99
Y th Monthly R 99 Integrated bundle	Monthly	50 On-Net minutes + 500MB + 500MB night data	R 99

Source: ICASA Database based on Tariff Notifications

Upon depletion or expiry of the integrated bundles, customers are defaulted to the OOB rates of the Youth Pulse price plan which charges R 0.79 per min for voice calls, R 0.49 per MB for data and R 0.50 per SMS.

The introduction of the Youth Bundles benefits the youth by offering integrated bundles with reduced effective rates and more affordable prices. For example, on standard rates, MTN offers its 30-day 600MB data bundle for R 99 while the Youth Bundles on the other hand, offer monthly 500MB data and 150 on-net minutes for the same price.

2.6.1.6. Vodacom Power Bundles

Vodacom filed the introduction of its Power Bundles with the Authority on 04 June 2019. The Power Bundles were previously exclusive to the Power Pack price plan and are now available on all prepaid and hybrid tariff plans.

The bundles are available on a recurring and once-off basis and table 29 below details the bundles.

Table 29: Vodacom Power Bundles

Bundle Allocation	Price
Recurring bundles	
Valid for 7 days, 75MB, 15 on-net minutes, 150MB WhatsApp Bundle	R 29
Valid for 7 days, 350MB, 20 on-net minutes, 150MB WhatsApp Bundle	R 59
Valid for 30 days, 325MB, 20 on-net minutes, 325MB night owl, 1024MB WhatsApp Bundle	R 99
Valid for 30 days, 325MB, 20 on-net minutes, 325MB night owl, 1024MB WhatsApp Bundle	R 149
Valid for 30 days, 1100MB, 60 on-net minutes, 1100MB night owl, 1024MB WhatsApp Bundle	R 199
Valid for 30 days, 1600MB, 80 on-net minutes, 1600MB night owl, 1024MB WhatsApp Bundle	R 249
Valid for 30 days, 2500MB, 100 on-net minutes, 2500MB night owl 1024MB WhatsApp Bundle	R 299

Bundle Allocation	Price
Promo bundle Valid for 30 days, 650MB, 40 on-net mins, 650MB night owl, 1024MB WhatsApp Bundle	R 99
Once-off bundles	
Valid for 1 day, 15MB, 5 on-net minutes	R 5
Valid for 1 day, 30MB, 10 on-net minutes	R 8
Valid for 1 day, 45MB, 15 on-net mins, 30MB WhatsApp Bundle	R 12
Valid for 7 days, 75MB, 15 minutes, 150MB WhatsApp Bundle	R 29
Valid for 7 days, 350MB, 20 on-net mins, 150MB WhatsApp Bundle	R 59
Valid for 30 days, 650MB, 40 on-net minutes, 650MB night owl, 1024MB WhatsApp Bundle	R 99
Valid for 30 days, 325MB, 20 on-net minutes, 325MB night owl, 1024MB WhatsApp Bundle	R 149
Valid for 30 days, 1100MB, 60 on-net minutes, 1100MB night owl, 1024MB WhatsApp Bundle	R 199
Valid for 30 days, 1600MB, 80 on-net minutes, 1600MB night owl, 1024MB WhatsApp Bundle	R 249
Valid for 30 days, 2500MB, 100 on-net minutes, 2500MB night owl, 1024MB WhatsApp Bundle	R 299
Promo bundle Valid for 30 days, 650MB, 40 on-net minutes, 650MB night owl, 1024MB WhatsApp Bundle	R 99

Source: ICASA Database based on Tariff Notifications

Vodacom does not charge for the data roll over and transfer services. However, free data roll over is conditional such that an additional data bundle with the same validity and the same size or greater is purchased before the initial data bundle expires which then extends the validity of the old bundle in line with the expiry date of the new bundle. The Terms and Conditions regarding the data transfer service can be found on the operator's website²².

2.6.2. Promotional Prepaid Integrated Plans

2.6.2.1. MTN Bundle Bonanza

On 03 April 2019 MTN filed PAYG Bundle Bonanza promotion which is exclusively tailored for MTN customers that are on MTN Inflow price plan. The main objective of this promotion is to attract more customers to the Inflow price plan. In this promotion an initial minimum R 20 airtime voucher recharge rewards customers with 50MB data, 50 All net-voice minutes and 50 local SMS (integrated bundles) with a validity period of seven days. In addition, customers receive more data and voice rewards from 8th to 31st day of the price plan activation. Customers benefit

²² Available on: <<https://www.vodacom.co.za/vodacom/terms/data-bundle-terms/data-transfer>> Accessed on 05 August 2019.

from the free additional bundles that are offered by this promotion, since they are equivalent to the purchased standard bundle.

The MTN Bundle Bonanza has made the MTN Inflow price plan competitive when compared to its counterpart, the Cell C UltraBonus tariff plan. Cell C UltraBonus rewards its subscribers with 200% free additional airtime, split into 100% bonus on-net and 100% all-net airtime. Although UltraBonus airtime also allow the customers to send SMSes, buy data and make calls, the bonus airtime offers are valid for twenty-four hours while Bundle Bonanza offers have a validity period of seven days. The Bundle Bonanza promotion was effected on 15 April 2019 and will be in the market until further notice.

2.6.2.2. Vodacom Power Bundles Promotion

On the 31st of May 2019 Vodacom filed a three-month promotion called Power Bundles which was expected to run from 12 June 2019 to 12 September 2019. However, it is worth noting that the operator filed an extension of the promotional offer on 20 August 2019 and is now expected to be in the market until 29 February 2020. Vodacom’s Power Bundles promotion is an integrated bundle promotion inclusive of voice minutes, data bundles, WhatsApp bundles, Night Owl bundles depending on what a customer purchase and the tariff plan they subscribed to.

Table 30 below shows the different integrated bundles offered on its Power Bundles promotion. The various price plans of this promotion enable customers to purchase products tailored for their needs. Integrated bundles are beneficial to customers because customers receive different bundles on one package at a reduced price. For instance, a customer purchasing standard prepaid once-off 500MB and 1GB WhatsApp ticket valid for 30 days will be charged R 135 and a R 99 Power bundle offers customers 40 voice minutes, 650MB anytime data, 650MB Night Owl data and 1GB WhatsApp bundle all valid for 30 days.

Table 30: Vodacom Promotional Power Bundles Promotion

Tariff Plan	Allocation	Price	Validity
Vodacom Power Pack	30 minutes, 150MB data, 300MB WhatsApp Bundle	R 25	7 days
Vodacom Power Pack	40 minutes, 650MB data, 650MB NightOwl, 1GB WhatsApp Bundle	R 99	30 days

Vodacom Power Bonus	30 minutes, 150MB data, 300MB WhatsApp Bundle	R 25	7 days
Vodacom Power Bonus	40 minutes, 650MB data, 650MB NightOwl, 1GB WhatsApp Bundle	R 99	30 days
Vodacom Daily Free Calls	30 minutes, 150MB data, 300MB WhatsApp Bundle	R 25	7 days
Vodacom Daily Free Calls	40 minutes, 650MB data, 650MB NightOwl, 1GB WhatsApp Bundle	R 99	30 days
Vodacom Anytime Per Second	30 minutes, 150MB data, 300MB WhatsApp Bundle	R 25	7 days
Vodacom Anytime Per Second	40 minutes, 650MB data, 650MB NightOwl, 1GB WhatsApp Bundle	R 99	30 days
Vodacom 4 Less	30 minutes, 150MB data, 300MB WhatsApp Bundle	R 25	7 days
Vodacom 4 Less	40 minutes, 650MB data, 650MB NightOwl, 1GB WhatsApp Bundle	R 99	30 days
Vodacom Prepaid 79c	30 minutes, 150MB data, 300MB WhatsApp Bundle	R 25	7 days
Vodacom Prepaid 79c	40 minutes, 650MB data, 650MB NightOwl, 1GB WhatsApp Bundle	R 99	30 days
Siyakha	30 minutes, 150MB data, 300MB WhatsApp Bundle	R 25	7 days
Siyakha	40 minutes, 650MB data, 650MB NightOwl, 1GB WhatsApp Bundle	R 99	30 days
All Hybrid Plans	30 minutes, 150MB data, 300MB WhatsApp Bundle	R 25	7 days
All Hybrid Plans	40 minutes, 650MB data, 650MB NightOwl, 1GB WhatsApp Bundle	R 99	30 days

Source: ICASA Database based on Tariff Notifications

2.7. Fibre-to-the-Home Tariff Plans

This section analyses Fibre-to-the Home (FTTH) tariff plans offered in the market and the prices charged by the operators, as per notifications filed from 01 January to 30 June 2019. The analysis of the tariff plans will consider the current month-to-month (MtM) Self-Built FTTH plans, month-to-month fibre plans offered through 3rd party fibre network operators (FNOs) and promotional offers applicable to MtM contracts offered during the period under review.

2.7.1. Self-Built FTTH Offerings

2.7.1.1. Vodacom Self-Built FTTH

Vodacom filed an amendment of its Self-Built FTTH offerings with the Authority on 21 June 2019 following the filings on 13 June 2017 and 18 April 2018, reducing the subscription fees on a number of its offerings.

Table 31 details the price changes on the Vodacom Self-Built FTTH offerings.

Table 31: Vodacom Self-Built FTTH

Line Speed	Data Allocation	Previous Monthly Subscription	New Monthly Subscription	Price Difference	Variance (%)
10/5Mbps	100GB	R 599	R 599	R 0	0%
10/5Mbps	Uncapped	R 699	R 699	R 0	0%
10/10Mbps	Uncapped	R 899	R 799	-R 100	-11.1%
20/10Mbps	200GB	R 799	R 799	R 0	0%
20/10Mbps	400GB	R 899	R 899	R 0	0%
20/10Mbps	Uncapped	R 999	R 899	-R 100	-10%
20/20Mbps	Uncapped	R 1 099	R 999	-R 100	-9.1%
40/20Mbps	300GB	R 999	R 999	R 0	0%
40/20Mbps	800GB	R 1 099	R 1 099	R 0	0%
40/20Mbps	Uncapped	R 1 199	R 1 149	-R 50	-4.2%
40/40Mbps	Uncapped	R 1 299	R 1 199	-R 100	-7.7%
100/50Mbps	600GB	R 1 199	R 1 199	R 0	0%
100/50Mbps	1000GB	R 1 399	R 1 399	R 0	0%
100/50Mbps	Uncapped	R 1 499	R 1 299	-R 200	-13.3%
100/100Mbps	Uncapped	R 1 599	R 1 399	-R 200	-12.5%

Source: ICASA Database based on Tariff Notifications

The 100/50Mbps uncapped fibre offering had the greatest subscription fee reduction in both percentage terms and absolute value of 13.3% and R 200, respectively as it decreased from R 1 499 to R 1 299. The 100/100Mbps uncapped fibre offerings had the highest absolute value tariff decrease of R 200.

It should be noted that month-to-month contracts are subject to a once-off service activation fee of R 910 and all uncapped offerings are subject to Fair Usage Policy (FUP) as detailed in the terms and conditions of the offering²³.

2.7.1.2. MWEB

MWEB launched two new products on behalf of its 3rd party Fibre Network Operator (FNO) Mitchells Fibre at Mitchell Plain suburb (32 km from the City of Cape Town) on 12 June 2019²⁴, the fibre packages have two options, these are 28 Day Prepaid access and 30 day monthly recurring access. Both options have internet speed of 20Mbps and are priced at R 399 respectively. The launch of these new products by MWEB is intended to provide broadband access to lower end of the market and

²³ Available on: < <https://www.vodacom.co.za/vodacom/terms/fibre/vodacom-fibre> > Accessed on 30 July 2019.

²⁴ Notification was filed on 03 June 2019.

it is likely to assist MWEB with gaining more customer base in the region and customers may benefit from the prepaid fibre packages as they do not have to sign long term contracts.

2.7.2. Fibre Plans offered through 3rd Party Fibre Network Operators

2.7.2.1. MWEB on Vumatel/Vuma Aerial

MWEB filed amendments of its 3rd party Vumatel/Aerial FTTH offerings with the Authority on 03 January 2019, 22 January 2019 and 22 February 2019. The amendments entailed discontinuation of some FTTH offerings, price adjustments and the introduction of new line speeds.

On 03 January 2019, MWEB introduced new capped and uncapped 10Mbps fibre offerings and discontinued the 4Mbps fibre offerings, as shown in table 32 below. The amendment filed on 22 January 2019 was a R 30 increase in subscription fees of the packages previously filed with the Authority on 25 July 2018 and the introduction of the 1Gbps fibre package with 500GB + Uncapped Night Time Data for R 2 569 per month.

On 22 February 2019, MWEB filed amendments and a promotional offer. The operator reduced tariffs of the Uncapped 10Mbps Fibre and Uncapped 10/10Mbps Fibre it introduced in the market on 03 January 2019, from R 659 and R 759 to R 579 and R 679, respectively. The amendment was effective on 25 February 2019 for new customers and 01 March 2019 for existing customers.

The operator also introduced a 1Gbps fibre package with 1000GB and Uncapped Night Time Data for R 1 499 and discontinued the 1Gbps fibre package with 500GB + Uncapped Night Time Data that was filed on 22 January 2019, which came into effect on 01 March 2019.

The promotional offer is the Uncapped 1Gbps Fibre which was made available to new and existing customers for R 1 499. The promotional offer was introduced in the market on 25 February 2019 and is expected to be in the market until March

2020. Table 32 details the amendments to the MWEB on Vumatel/Aerial FTTH made in the period under review.

Table 32: MWEB on Vumatel/Aerial FTTH

Product Description	Data Cap (GB)	Line Speed	Previous Price	New Price	Price Difference	Variance (%)
03 January 2019 Amendment						
50GB + Uncapped Night Time Data + 4Mbps Fibre	50	4Mbps	R 529	Discontinued	N/A	N/A
Uncapped 4Mbps Fibre	Uncapped	4Mbps	R 729	Discontinued	N/A	N/A
100GB + Uncapped Night Time Data + 10Mbps Fibre	100	10Mbps	N/A	R 589	N/A	N/A
200GB + Uncapped Night Time Data + 10Mbps Fibre	200	10Mbps	N/A	R 689	N/A	N/A
Uncapped 10Mbps Fibre	Uncapped	10Mbps	N/A	R 659	N/A	N/A
100GB + Uncapped Night Time Data + 10Mbps Fibre	100	10Mbps	N/A	R 589	N/A	N/A
200GB + Uncapped Night Time Data + 10Mbps Fibre	200	10Mbps	N/A	R 689	N/A	N/A
Uncapped 10Mbps Fibre - VUMATEL-AERIAL	Uncapped	10Mbps	N/A	R 659	N/A	N/A
100GB + Uncapped Night Time Data + 10/10Mbps Fibre	100	10Mbps	N/A	R 689	N/A	N/A
200GB + Uncapped Night Time Data + 10/10Mbps Fibre	200	10Mbps	N/A	R 789	N/A	N/A
Uncapped 10/10Mbps Fibre - VUMATEL	Uncapped	10Mbps	N/A	R 759	N/A	N/A
100GB + Uncapped Night Time Data + 10/10Mbps Fibre	100	10Mbps	N/A	R 689	N/A	N/A
200GB + Uncapped Night Time Data + 10/10Mbps Fibre	200	10Mbps	N/A	R 789	N/A	N/A
22 January 2019 Amendment						
30GB + Uncapped Night Time Data + 20Mbps Fibre	30	20Mbps	R 629	R 659	R 30	4.8%
100GB + Uncapped Night Time Data + 20Mbps Fibre	100	20Mbps	R 729	R 759	R 30	4.1%
200GB + Uncapped Night Time Data + 20Mbps Fibre	200	20Mbps	R 779	R 809	R 30	3.9%
500GB + Uncapped Night Time Data + 20Mbps Fibre	500	20Mbps	R 929	R 959	R 30	3.2%
100GB + Uncapped Night Time Data + 20/20Mbps Fibre	100	20Mbps	R 829	R 859	R 30	3.6%
200GB + Uncapped Night Time Data + 20/20Mbps Fibre	200	20Mbps	R 879	R 909	R 30	3.4%
500GB + Uncapped Night Time Data + 20/20Mbps Fibre	500	20Mbps	R 1 039	R 1 069	R 30	2.9%
200GB + Uncapped Night Time Data + 50Mbps Fibre	200	50Mbps	R 929	R 959	R 30	3.2%
500GB + Uncapped Night Time Data + 50Mbps Fibre	500	50Mbps	R 1 039	R 1 069	R 30	2.9%
200GB + Uncapped Night Time Data + 50/50Mbps Fibre	200	50Mbps	R 1 039	R 1 069	R 30	2.9%
500GB + Uncapped Night Time Data + 50/50Mbps Fibre	500	50Mbps	R 1 139	R 1 169	R 30	2.6%
100GB + Uncapped Night Time Data + 100Mbps Fibre	100	100Mbps	R 1 039	R 1 069	R 30	2.9%
200GB + Uncapped Night Time Data + 100Mbps Fibre	200	100Mbps	R 1 089	R 1 119	R 30	2.8%
500GB + Uncapped Night Time Data + 100Mbps Fibre	500	100Mbps	R 1 289	R 1 319	R 30	2.3%
100GB + Uncapped Night Time Data + 100/100Mbps Fibre	100	100Mbps	R 1 139	R 1 169	R 30	2.6%

200GB + Uncapped Night Time Data + 100/100Mbps Fibre	200	100Mbps	R 1 189	R 1 219	R 30	2.5%
500GB + Uncapped Night Time Data + 100/100Mbps Fibre	500	100Mbps	R 1 389	R 1 419	R 30	2.2%
100GB + Uncapped Night Time Data + 200Mbps Fibre	100	200Mbps	R 1 189	R 1 219	R 30	2.5%
200GB + Uncapped Night Time Data + 200Mbps Fibre	200	200Mbps	R 1 289	R 1 319	R 30	2.3%
500GB + Uncapped Night Time Data + 200Mbps Fibre	500	200Mbps	R 1 489	R 1 519	R 30	2%
100GB + Uncapped Night Time Data + 200/200Mbps Fibre	100	200Mbps	R 1 289	R 1 319	R 30	2.3%
200GB + Uncapped Night Time Data + 200/200Mbps Fibre	200	200Mbps	R 1 389	R 1 419	R 30	2.2%
500GB + Uncapped Night Time Data + 200/200Mbps Fibre	500	200Mbps	R 1 589	R 1 619	R 30	1.9%
Uncapped 20Mbps Fibre	Uncapped	20Mbps	R 829	R 859	R 30	3.6%
Uncapped 20/20Mbps Fibre	Uncapped	20Mbps	R 929	R 959	R 30	3.2%
Uncapped 50Mbps Fibre	Uncapped	50Mbps	R 1 039	R 1 069	R 30	2.9%
Uncapped 50/50Mbps Fibre	Uncapped	50Mbps	R 1 139	R 1 169	R 30	2.6%
Uncapped 100Mbps Fibre	Uncapped	100Mbps	R 1 239	R 1 269	R 30	2.4%
Uncapped 100/100Mbps Fibre	Uncapped	100Mbps	R 1 339	R 1 369	R 30	2.2%
Uncapped 200Mbps Fibre	Uncapped	200Mbps	R 1 389	R 1 419	R 30	2.2%
Uncapped 200/200Mbps Fibre	Uncapped	200Mbps	R 1 489	R 1 519	R 30	2%
500Gb + Uncapped Night Time Data + 1Gbps Fibre	500	1Gbps	N/A	R 2 569	N/A	N/A
22 February Amendment						
Uncapped 10Mbps Fibre	Uncapped	10Mbps	R 659	R 579	-R 80	-12.1%
Uncapped 10/10Mbps Fibre	Uncapped	10Mbps	R 759	R 679	-R 80	-10.5%
1000GB + Uncapped Night Time Data + 1Gbps Fibre	1000	1Gbps	N /A	R 1 499	N/A	N/A
Uncapped 1Gbps Fibre (Promotional Offer)	Uncapped	1Gbps	N/A	R 1 499	N/A	N/A

Source: ICASA database based on tariff notifications

2.7.2.2. MTN Supersonic FTTH Offerings

MTN filed amendments of its 3rd party FTTH offerings with the Authority on 14 January 2019, 18 February 2019 and on 30 May 2019, changing the FTTH offerings on Openserve, Frogfoot and Vumatel Networks. The initial MTN Supersonic FTTH offerings were filed with the Authority on 24 July 2018, and Frogfoot together with other 3rd party FNOs were introduced on 29 October 2018.

The amendment filed by MTN on 24 January 2019 entailed the introduction of new line speeds, the subscription fee adjustment of the Frogfoot 10/10Mbps line speed and the decommissioning of the Vumatel 4/1Mbps line speed. The initial Openserve uncapped 4/2Mbps package filed by MTN on 24 July 2018 offered a free router, installation and an activation fee of R 1 000 for a monthly subscription of R 549. The latest amendment charges R 1 000, R 2 300 and R 575 for the

router, installation and activation, respectively for the same plan. MTN also added a new Openserve 200/100Mbps uncapped fibre and adjusted the subscription fee of the Frogfoot 10/10Mbps uncapped fibre package as shown in table 33 below. The amendment was effective from 23 January 2019.

MTN's Supersonic FTTH on Vumatel offering was further amended 18 February 2019 and on 30 May 2019. The changes made to the fibre offerings on 18 February came into effect on 27 February 2019 and included the adjustment of the subscription fees of some of the fibre packages and the introduction of the 200/20Mbps line speed as shown in table 33 below. The amendment filed on 30 May involved the discontinuation of the 10/1Mbps line speed offering and the reduction of subscription fees of the fibre packages as shown in the table below. The amendment became effective on 10 June 2019.

MTN's 3rd party FTTH offerings are shown in Table 33 below, these are month-to-month, uncapped and include a free router, installation and activation for line speeds of at least 10Mbps. However, VoIP rental and usage charges are excluded.

Table 33: MTN Supersonic Fibre Offerings

Fibre Network Provider (FNP)	Speed (Mbps)	Previous Price	New Price	Price Difference	Price Variance (%)
14 January 2019 Amendment					
Openserve	4/2	R 549	R 549	N/A	N/A
	200/100	-	R 1 749	N/A	N/A
Frogfoot	10/10	R 595	R 695	R 100	16.8%
Vumatel	4/1	R 699	(Discontinued)	N/A	N/A
	10/1	-	R 699	N/A	N/A
	10/10	-	R 799	N/A	N/A
	200/200	-	R 1 499	N/A	N/A
	1000/100	-	R 2 599	N/A	N/A
18 February 2019 Amendment					
Vumatel	20/2	R 849	R 879	R 30	3.5%
	20/20	R 899	R 929	R 30	3.3%
	50/5	R 1 049	R 1 079	R 30	2.9%
	50/50	R 1 099	R 1 129	R 30	2.7%
	100/10	R 1 199	R 1 229	R 30	2.5%
	100/100	R 1 249	R 1 279	R 30	2.4%
	200/20	-	R 1 379	N/A	N/A
30 May 2019 Amendment					
Vumatel	10/1	R 699	(Discontinued)	N/A	N/A
	10/10	R 799	R 729	-R 70	-8.8%
	20/2	R 879	R 829	-R 50	-5.7%
	20/20	R 929	R 899	-R 30	-3.2%

Fibre Network Provider (FNP)	Speed (Mbps)	Previous Price	New Price	Price Difference	Price Variance (%)
	50/5	R 1 079	R 1 029	-R 50	-4.6%
	100/10	R 1 229	R 1 179	-R 50	-4.1%
	100/100	R 1 279	R 1 229	-R 50	-3.9%
	200/20	R 1 379	R 1 329	-R 50	-3.6%
	200/200	R 1 499	R 1 399	-R 100	-6.7%

Source: ICASA Database based on Tariff Notifications

2.7.2.3. Cybersmart on Vumatel FTTH

The Cybersmart FTTH on Vumatel was filed with the Authority on 22 February 2019 and was introduced in the market on 01 March 2019. The FTTH offerings comprise of symmetrical/synchronous and asynchronous fibre packages. The synchronous fibre packages have line speeds ranging from 10Mbps to 200Mbps, while the asynchronous fibre packages have download and upload speeds ranging from 10Mbps to 200Mbps and 2Mbps to 20Mbps, respectively, as detailed on table 34 below.

Table 34: Cybersmart on Vumatel FTTH

Line Speed	Subscription Fee
Home	
10/2Mbps	R 579
10/10Mbps	R 599
20/2Mbps	R 699
20/20Mbps	R 799
50/5Mbps	R 879
50/50Mbps	R 989
100/10Mbps	R 1 019
100/100Mbps	R 1 099
200/20Mbps	R 1 299
200/200Mbps	R 1 399

Source: ICASA Database based on Tariff Notifications

It should be noted that customers are subject to once-off activation and installation fees of R 999 and R 1 725, respectively.

2.7.2.4. Vodacom Fibre Broadband on Openserve Bitstream Network

Vodacom filed a notification with the Authority on 14 March 2019 regarding its Fibre Broadband on Openserve Bitstream Network. The operator offers 3rd party

asymmetrical fibre services ranging from 10Mbps to 100Mbps of download speed, while the upload speed ranges from 5Mbps to 50Mbps. It should be noted that the uncapped fibre offerings are subject to the fair user policy (FUP) which can be found in the operator’s website²⁵. Table 35 below details the fibre offerings.

Table 35: Vodacom Fibre Broadband on Openserve

Line Speed (Mbps)	Monthly Data Allocation (GB)	Monthly Subscription
10/5	50	R 549
10/5	200	R 604.25
10/5	Uncapped	R 806.01
20/10	300	R 1 007.76
20/10	Uncapped	R 1 310.39
40/20	200	R 1 007.76
40/20	600	R 1 310.39
40/20	Uncapped	R 1 512.15
100/50	600	R 1 411.27
100/50	Uncapped	R 2 016.54

Source: ICASA Database based on Tariff Notifications

It should be noted that customers that opt for the MtM contract are liable for a once-off activation fee of R 1 010.

2.7.2.5. Vodacom Fibre Broadband on Vumatel Bitstream Network

Vodacom filed a notification with the Authority on 26 March 2019 regarding its Fibre Broadband on Vumatel and Vumatel Aerial Bitstream Network. The operator offers 3rd party asymmetrical and symmetrical fibre services ranging from 10Mbps to 100Mbps of download speed, while upload speed ranges from 2Mbps to 100Mbps. It should be noted that the uncapped fibre offerings are subject to the FUP.

Table 36 below details the Vodacom Fibre Broadband on Vumatel and Vumatel Aerial Bitstream Network offerings.

²⁵ Available on: < <https://www.vodacom.co.za/vodacom/terms/fibre/vodacom-fibre> > Accessed on 30 July 2019.

Table 36: Vodacom Fibre Broadband on Vumatel and Vumatel Aerial

Line Speed (Mbps)	Monthly Data Allocation	Monthly Subscription
10/2	100GB	R 559
10/2	Uncapped	R 619
10/10	Uncapped	R 669
20/2	200GB	R 806.01
20/20	Uncapped	R 806.01
20/20	Uncapped	R 906.89
50/5	Uncapped	R 1 007.76
50/50	200GB	R 1 007.76
50/50	400GB	R 1 058.20
50/50	Uncapped	R 1 108.64
100/10	Uncapped	R 1 259.96
100/100	500GB	R 1 209.52
100/100	Uncapped	R 1 310.39

Source: ICASA Database based on Tariff Notifications

It should be noted that a once-off activation fee of R 1 010 is payable by customers that opt for the MtM contracts.

2.7.2.6. Vodacom Fibre Broadband on MTN Bitstream Network

The Vodacom Fibre Broadband on MTN Bitstream Network was filed with the Authority on 28 March 2019. The offerings are symmetrical capped and uncapped fibre packages from 4Mbps to 100Mbps, subject to FUP. The once-off service activation fee attached to the month-to-month contracts is R 2 280. It is worth noting that the offerings are also available on 12-month and 24-month contracts, however, for the purpose of this report, the focus is on prepaid and MtM tariff plans.

Table 37 below shows the Vodacom Fibre Broadband on MTN Bitstream Network MtM offerings and their respective fair usage limits and respective subscription fees.

Table 37: Vodacom Fibre Broadband on MTN Bitstream Network Offerings

Line Speed	Symmetry Ratio	Capped/Uncapped	Data Allocation/FUP (GB)	Monthly Subscription
4Mbps	1:1	Capped	75	R 599
4Mbps	1:1	Uncapped	200	R 609
10Mbps	1:1	Capped	100	R 649
10Mbps	1:1	Capped	200	R 699
10Mbps	1:1	Uncapped	300	R 709
20Mbps	1:1	Capped	100	R 729
20Mbps	1:1	Capped	300	R 749

20Mbps	1:1	Uncapped	500	R 809
50Mbps	1:1	Capped	100	R 929
50Mbps	1:1	Capped	300	R 949
50Mbps	1:1	Uncapped	750	R 1 009
100Mbps	1:1	Capped	300	R 1 049
100Mbps	1:1	Capped	500	R 1 109
100Mbps	1:1	Uncapped	1000	R 1 199

Source: ICASA Database based on Tariff Notifications

2.7.2.7. Vodacom Fibre Broadband on TT Connect Bitstream Network

The Vodacom Fibre Broadband on TT Connect Bitstream Network was filed with the Authority on 28 March 2019, offering capped and uncapped symmetrical fibre connection from 10Mbps to 100Mbps line speeds. A once-off charge of R 999 is payable for all MtM contracts and the fair usage policy applies to the uncapped fibre offerings. Vodacom also offers the TT Connect fibre 12-month and 24-month contracts, however for the purpose of this report, the focus is on prepaid and MtM tariff plans.

Table 38 below shows MtM Vodacom Fibre Broadband on TT Connect Bitstream Network offerings.

Table 38: Vodacom Fibre Broadband on TT Connect Bitstream Network Offerings

Line Speed (Mbps)	Symmetry Ratio	Uncapped/Capped	Data Allocation/FUP (GB)	Monthly Subscription (Incl. VAT)
10	1:1	Capped	100	R 599
10	1:1	Uncapped	300	R 629
20	1:1	Uncapped	500	R 829
50	1:1	Uncapped	750	R 929
100	1:1	Uncapped	1000	R 1 129

Source: ICASA Database based on Tariff Notifications

2.7.2.8. LaserNet

On 17 April 2019²⁶ LaserNet added new last mile operators including Liquid Telecom in their network and amended MtM contract and Daily contracts (Ad Hoc Solution) fibre packages. The main objective of adding new last mile operators

²⁶ Notification filed on 10 April 2019

was to provide more last mile connectivity options for various clients in many areas. The prices of the fibre package are shown in table 39.

Table 39: LaserNet MtM fibre packages

Data Bundles	Price (VAT Incl.)
25GB	R 347.30
55GB	R 637.10
85GB	R 926.90
120GB	R 1 159.20
220GB	R 1 565.15
330GB	R 1 854.95

Source: ICASA Database based on Tariff Notification

LaserNet’s daily fibre packages prices are shown in table 40 below.

Table 40: LaserNet fibre offerings

LaserNet Link Speed – Synchronous	Cost Per Day (Including VAT)
10Mbps Uncapped 1:1	R 4 025
20Mbps Uncapped 1:1	R 5 750
50Mbps Uncapped 1:1	R 13 800
Installation of Internet*	R 5 175
Wi-Fi Kit Rental	R 3 105
Wi-Fi Kit Installation*	R 2 300

Source: ICASA Database based on Tariff Notification

2.7.2.9. MWEB on Frogfoot FTTH

MWEB filed notifications with the Authority regarding its Frogfoot fibre packages on 17 April 2019 and 27 June 2019. The notifications entailed the amendment of the Frogfoot fibre packages and the introduction of new asynchronous and synchronous fibre packages.

On 17 April 2019, MWEB filed a notification to increase upload speeds and prices of existing fibre packages and to introduce asynchronous fibre packages. The amendments came into effect on 01 May 2019. MWEB’s tariff amendment of the existing Frogfoot fibre offerings was resultant to an increase in upload speeds of the fibre packages. Thus, the subscription fees of the 3rd party FTTH packages increased uniformly by R 60. The operator also launched the Frogfoot asynchronous FTTH packages with an aim to offer more FTTH options to the

customers. Table 41 below details the amendment to the MWEB on Frogfoot FTTH offerings and the new packages.

MWEB's FTTH on Frogfoot was further amended on 27 June 2019 to reduce subscription fees of selected fibre packages and to introduce new synchronous and asynchronous fibre plans. The new fibre packages came into effect on 09 July 2019, while the price amendments made to the fibre offerings came into effect on 01 August 2019. Table 41 below details the amendment to the Frogfoot fibre packages.

Table 41: MWEB on Frogfoot FTTH Offerings

Product Description	Old Line Speed (Mbps)	Previous Price	New Line Speed (Mbps)	New Price	Price Difference	Variance (%)
Synchronous Fibre (17 April 2019)						
100GB + Uncapped Night Time Data + 10Mbps Fibre	10/5	R 639	10/10	R 699	R 60	9.4%
200GB + Uncapped Night Time Data + 10Mbps Fibre	10/5	R 729	10/10	R 789	R 60	8.2%
100GB + Uncapped Night Time Data + 20Mbps Fibre	20/10	R 689	20/20	R 749	R 60	8.7%
200GB + Uncapped Night Time Data + 20Mbps Fibre	20/10	R 739	20/20	R 799	R 60	8.1%
500GB + Uncapped Night Time Data + 20Mbps Fibre	20/10	R 889	20/20	R 949	R 60	6.7%
200GB + Uncapped Night Time Data + 50Mbps Fibre	50/25	R 839	50/50	R 899	R 60	7.2%
500GB + Uncapped Night Time Data + 50Mbps Fibre	50/25	R 989	50/50	R 1 049	R 60	6.1%
200GB + Uncapped Night Time Data + 100Mbps Fibre	100/50	R 939	100/100	R 999	R 60	6.4%
500GB + Uncapped Night Time Data + 100Mbps Fibre	100/50	R 1 099	100/100	R 1 159	R 60	5.5%
Uncapped Including 10Mbps Fibre Line	10/5	R 669	10/10	R 729	R 60	9%
Uncapped Including 20Mbps Fibre Line	20/10	R 829	20/20	R 889	R 60	7.2%
Uncapped Including 50Mbps Fibre Line	50/25	R 929	50/50	R 989	R 60	6.5%
Uncapped Including 100Mbps Fibre Line	100/50	R 1 139	100/100	R 1 199	R 60	5.3%
Asynchronous Fibre (17 April 2019)						
100GB + Uncapped Night Time Data + 20Mbps Fibre	N/A	N/A	20/2	R 689	N/A	N/A
200GB + Uncapped Night Time Data + 20Mbps Fibre	N/A	N/A	20/2	R 739	N/A	N/A
500GB + Uncapped Night Time Data + 20Mbps Fibre	N/A	N/A	20/2	R 889	N/A	N/A
200GB + Uncapped Night Time Data + 50Mbps Fibre	N/A	N/A	50/5	R 839	N/A	N/A
500GB + Uncapped Night Time Data + 50Mbps Fibre	N/A	N/A	50/5	R 989	N/A	N/A
200GB + Uncapped Night Time Data + 100Mbps Fibre	N/A	N/A	100/10	R 939	N/A	N/A
500GB + Uncapped Night Time Data + 100Mbps Fibre	N/A	N/A	100/10	R 1 099	N/A	N/A
Uncapped Including 20Mbps Fibre Line	N/A	N/A	20/2	R 829	N/A	N/A

Uncapped Including 50Mbps Fibre Line	N/A	N/A	50/5	R 929	N/A	N/A
Uncapped Including 100Mbps Fibre Line	N/A	N/A	100/10	R 1 139	N/A	N/A
27 June 2019 Amendment						
Uncapped 20Mbps Fibre	N/A	R 829	20/2	R 699	-R 130	-15.7%
Uncapped 50Mbps Fibre	N/A	R 929	50/5	R 849	-R 80	-8.6%
Uncapped 100Mbps Fibre	N/A	R 1 139	100/10	R 949	-R 190	-16.7%
Uncapped 20/20Mbps Fibre	N/A	R 889	20/20	R 849	-R 40	-4.5%
Uncapped 50/50Mbps Fibre	N/A	R 989	50/50	R 929	-R 60	-6.1%
Uncapped 100/100Mbps Fibre	N/A	R 1 199	100/100	R 1 049	-R 150	-12.5%
New Products (27 June 2019)						
Uncapped 10Mbps Fibre	N/A	N/A	10/5	R 649	N/A	N/A
Uncapped 200/200Mbps Fibre	N/A	N/A	200/200	R 1 269	N/A	N/A
Uncapped 1/1Gbps Fibre	N/A	N/A	1000/1000	R 1 999	N/A	N/A

Source: ICASA Database based on Tariff Notifications

2.7.2.10. Amobia Communications

Amobia Communications (Pty) Ltd is an internet service provider (ISP) providing wireless and fibre internet connection to individuals and organisations. The operator received its electronic communications service licence from the Authority 15 January 2009. On 29 May 2019, the operator filed new self-built and 3rd party fibre offerings with the Authority. Table 42 below shows MtM fibre offerings on Frogfoot with their respective subscription fees.

Table 42: Amobia Communications FTTH on Frogfoot

Line Speed (Mbps)	Month-to-Month Subscription Fee
10/10	R 620
20/2	R 700
20/20	R 760
50/5	R 850
50/50	R 900
100/10	R 1 200
100/100	R 1 250
Uncapped Free Installation Fibre	
10/10	R 735
20/2	R 810
20/20	R 865
50/5	R 960
50/50	R 1 015
100/10	R 1 300
100/100	R 1 365

Source: ICASA Database based on Tariff Notification

Customers have an option to opt for free installation contracts or charged installation fee contracts as shown in the table above. It should be noted that the fibre packages are subject to FUP. The operator’s website details the fibre offerings²⁷.

2.7.2.11. MWEB on Lightstruck FTTH

MWEB filed its Lightstruck FTTH offerings with the Authority on 03 June 2019. The fibre offerings are uncapped and symmetrical, ranging from 20Mbps to 1Gbps. Table 43 below shows the line speeds on offer and their respective subscription fees.

Table 43: MWEB on Lightstruck FTTH

Line Speed	20Mbps	50Mbps	100Mbps	200Mbps	500Mbps	1Gbps
Subscription Fee	R 649	R 879	R 1 049	R 1 179	R 1 399	R 1 899

Source: ICASA Database based on Tariff Notifications

The fibre offerings were introduced in the market on 17 June 2019.

2.7.2.12. Vodacom Fibre Broadband on Frogfoot

Vodacom notified the Authority of its intention to amend its Frogfoot fibre offerings on 20 June 2019. The amendment entailed decommissioning of some of its line speeds, revision of subscription fees of existing packages and the introduction of new offerings as shown in table 44 below.

Table 44: Vodacom Fibre Broadband on Frogfoot

Line Speed	Capped/Uncapped	Data Allocation	FUP	Subscription Fee
Decommissioned Packages				
10/5Mbps	Capped	50GB	N/A	R 503.38
10/5Mbps	Uncapped	N/A	500GB	R 553.82
20/10Mbps	Capped	200GB	N/A	R 654.69
20/10Mbps	Uncapped	N/A	750GB	R 705.13
50/25Mbps	Capped	300GB	N/A	R 806.01
50/25Mbps	Uncapped	N/A	1500GB	R 856.45
100/50Mbps	Capped	200GB	N/A	R 856.45

²⁷ Available on: < <http://www.amobia.com/categories/frogfoot-home-fibre-packages>> Accessed on 06 August 2019.

100/50Mbps	Uncapped	N/A	2500GB	R 957.32
Revised Packages				
10/10Mbps	Uncapped	N/A	500GB	R 659
20/20Mbps	Uncapped	N/A	750GB	R 819
50/50Mbps	Uncapped	N/A	1500GB	R 909
100/100Mbps	Uncapped	N/A	2500GB	R 1 009
New Packages				
5/5Mbps	Capped	50GB	N/A	R 599
5/5Mbps	Uncapped	N/A	300GB	R 609
20/2Mbps	Uncapped	N/A	750GB	R 759
50/5Mbps	Uncapped	N/A	1500GB	R 859
100/10Mbps	Uncapped	N/A	2500GB	R 959

Source: ICASA Database based on Tariff Notifications

Comparing the discontinued and the new FTTH packages, customers are incurring more subscription costs while the line speeds are being reduced. For an example, the 10/5Mbps capped (50GB) fibre package was offered for R 503.38, now the download speed has been reduced to 5Mbps and the new package is offered for R 599, which is R 95.62 (19%) more expensive.

It should be noted that customers who choose to take up the MtM contracts are subject to a once off connection fee of R 1 010.

2.7.2.13. MWEB on Octotel FTTH

MWEB filed an amendment on its Octotel FTTH packages with the Authority on 20 June 2019. The amendment entailed the increase in the price of FTTH packages and the introduction of synchronous and asynchronous fibre packages. However, apart from the increase, MWEB also reduced the price of 20Mbps and 100Mbps Uncapped products with R 30 and R 100, respectively, as shown in table 45 below. Tables 45 and 46 below show respectively show the amendment to the Octotel fibre offerings and the new fibre offerings.

Table 45: MWEB on Octotel FTTH

Product Description	Data Cap (GB)	Line Speed	Current Price	New Price	Variance (%)	Price Difference
50Gb + Uncapped Night Time Data + 10Mbps Fibre	50	10/5Mbps	R 529	R 619	17%	R 90
100Gb + Uncapped Night Time Data + 10Mbps Fibre	100	10/5Mbps	R 579	R 669	15.5%	R 90

200Gb + Uncapped Night Time Data + 10Mbps Fibre	200	10/5Mbps	R 629	R 719	14.3%	R 90
100Gb + Uncapped Night Time Data + 20Mbps Fibre	100	20/5Mbps	R 719	R 739	2.8%	R 20
200Gb + Uncapped Night Time Data + 20Mbps Fibre	200	20/5Mbps	R 779	R 799	2.6%	R 20
100Gb + Uncapped Night Time Data + 100Mbps Fibre	100	100/25Mbps	R 819	R 849	3.7%	R 30
200Gb + Uncapped Night Time Data + 100Mbps Fibre	200	100/25Mbps	R 879	R 909	3.4%	R 30
500Gb + Uncapped Night Time Data + 100Mbps Fibre	500	100/25Mbps	R 1 039	R 1 069	2.9%	R 30
Uncapped 10Mbps Fibre	Uncapped	10/5Mbps	R 629	R 649	3.2%	R 20
Uncapped 20Mbps Fibre	Uncapped	20/5Mbps	R 829	R 799	-3.6%	-R 30
Uncapped 100Mbps Fibre	Uncapped	100/25Mbps	R 1 139	R 1 039	-8.8%	-R 100

Source: ICASA Database based on Tariff Notifications

Table 46: MWEB Synchronous and Asynchronous FTTH on Octotel

Product Description	Data Cap	Line Speed	Launch Price
Asynchronous Products			
Uncapped 200Mbps Fibre	Uncapped	200/25Mbps	R 1 299
Uncapped 1Gbps Fibre	Uncapped	1000/25Mbps	R 1 999
Synchronous Products			
Uncapped 10/10Mbps Fibre	Uncapped	10/10Mbps	R 719
Uncapped 20/20Mbps Fibre	Uncapped	20/20Mbps	R 869
Uncapped 100/100Mbps Fibre	Uncapped	100/100Mbps	R 1 239
Uncapped 200/200Mbps Fibre	Uncapped	200/200Mbps	R 1 359

Source: ICASA Database based on Tariff Notifications

The price changes and introduction of new products were effective on 30 June 2019.

2.7.2.14. MWEB on Openserve FTTH

MWEB filed its new uncapped asynchronous Openserve FTTH products with the Authority on 27 June 2019. The line speeds for the new packages range from 10Mbps to 40Mbps and are subject to the FUP. Table 47 below shows the new fibre offerings and their respective prices and FUP.

Table 47: MWEB on Openserve FTTH

Product Description	FUP (GB)	Price
Uncapped 10Mbps Fibre	100	R 599
Uncapped 20Mbps Fibre	200	R 799

Uncapped 40Mbps Fibre	300	R 949
Uncapped 100Mbps Fibre	500	R 1 099
Uncapped 200Mbps Fibre	750	R 1 399

Source: ICASA Database based on Tariff Notifications

The new packages were introduced in the market on 09 July 2019.

2.7.3. Promotional FTTH Plans

2.7.3.1. Vodacom LTE Interim Access and Free Subscription

Vodacom introduced its LTE Interim Access in 2017. Since the preceding 2018/19 FY Q4 Bi-Annual Tariff Analysis Report, the operator has filed extensions of the promotional offer on 22 January 2019 and 19 March 2019. It is worth noting that Vodacom filed another extension on 19 July 2019, to extend the promotion to 31 January 2020. The promotion offers new Vodacom Fibre Interim LTE Access customers free interim LTE access subscription and 100GB for R 599, irrespective of whether they are on bitstream or self-built networks. It should be noted that no amendments were filed with the Authority, since the preceding report, 2018/19 FY Q4 Bi-Annual Tariff Analysis Report²⁸.

2.7.3.2. Fibre Broadband on Evotel

Vodacom initially filed its Fibre Broadband on Evotel with the Authority on 12 February 2018 and was expected to be in the market for six months from launch date. The operator has, however, filed extensions of the promotion with the Authority on 07 August 2018, 22 January 2019, 19 March 2019 and 19 July 2019. It should be noted that no amendments have been filed with the Authority from the initial filing. Table 48 below details the Evotel promotional fibre.

Table 48: Vodacom Fibre on Evotel Promotion

Line Speed (Mbps)	Monthly Data Allocation	Monthly Subscription
10/5	100GB	R 449
10/10	Uncapped	R 549
20/20	Uncapped	R 679
40/40	Uncapped	R 749

²⁸ Page 67 Available online at : on ICASA's website < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-jul-dec-2018>> Accessed on 22 July 2019

100/100	Uncapped	R 1 049
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Source: ICASA Database based on Tariff Notifications

It should be noted that the promotion is only available on the Evotel Fibre Network footprint which was purchased by Vodacom. The promotional offer period has been extended from 31 July 2019 to 31 January 2020.

2.7.3.3. Vodacom Fibre Broadband on Edge 1-3

The Vodacom Fibre Broadband on Edge Promotion was filed with the Authority on 22 January 2019 and was anticipated to be in the market until 31 March 2019. Vodacom filed an extension of the promotion on 19 March 2019 and it was expected to be in the market until 31 July 2019. On 19 July 2019, the operator filed a further extension of the promotion to 31 January 2020. The promotion offers free service activation for the fibre contracts and is only available in selected areas in KZN where there is Edge Overbuilt Fibre Network footprint.

Table 49 below shows the fibre packages offered by Vodacom on Edge 1-3.

Table 49: Vodacom Fibre Broadband on Edge 1-3

Line Speed (Mbps)	Monthly Data Allocation (GB)	Monthly Subscriptions		
		Edge One	Edge Two	Edge Three
10/5	100	R 599	R 549	R 549
10/5	Uncapped	R 699	R 599	R 599
10/10	Uncapped	R 799	R 749	R 749
20/10	200	R 699	N/A	R 699
20/10	Uncapped	R 749	R 899	R 749
20/20	Uncapped	R 849	R 949	R 849
40/20	300	R 899	R 849	R 849
40/20	Uncapped	R 949	R 1 049	R 949
40/40	Uncapped	R 1 049	R 1 099	R 1 049
100/50	600	R 1 149	R 1 149	R 1 149
100/50	Uncapped	R 1 199	R 1 249	R 1 199
100/100	Uncapped	R 1 249	R 1 299	R 1 249

Source: ICASA Database based on Tariff Notifications

It should be noted that all uncapped packages are subject to FUP as stipulated in the Terms and Conditions found in Vodacom's website²⁹.

²⁹ Available on: < <https://www.vodacom.co.za/vodacom/terms/fibre/vodacom-fibre> > Accessed on 30 July 2019.

2.7.3.4. Vodacom Fibre Broadband on Edge 4 (Evotel)

Vodacom filed its Fibre Broadband on Edge Promotion with the Authority on 22 January 2019 and the promotion was anticipated to be in the market until 31 March 2019. However, the operator filed two extensions of the promotion with the Authority, on 19 March 2019 and 19 July 2019 and the promotion is now expected to be in the market until 31 January 2020. The promotion offers free service activation for the fibre contracts.

Table 50 below shows the fibre packages by Vodacom on Edge 4 on the promotional offer.

Table 50: Vodacom Fibre Broadband on Edge 4 (Evotel)

Line Speed (Mbps)	Monthly Data Allocation	Monthly Subscription
10/5	100GB	R 449
10/10	Uncapped	R 549
20/20	Uncapped	R 679
40/40	Uncapped	R 749
100/100	Uncapped	R 1 049

Source: ICASA Database based on Tariff Notifications

It should be noted that FUP applies to the fibre packages.

2.7.3.5. Vodacom Broadband Fibre on Vumatel Bitstream Network

Vodacom filed the promotional broadband fibre offerings on Vumatel bitstream network on 26 March 2019. The promotion offers free once-off activation fees for the fibre offerings shown in table 51 below. The promotional offer was expected to be in the market until 31 July 2019. However, it is worth noting that Vodacom filed a notification with the Authority on 19 July 2019 to extend the promotional offer to 31 January 2020.

Table 51 shows the month-to-month Vodacom Broadband Fibre on Vumatel offerings and their respective subscription fees.

Table 51: Vodacom Broadband Fibre on Vumatel Bitstream Network

Line Speed (Mbps)	Monthly Data Allocation (GB)	Monthly Subscription
10/2	100	R 649
10/2	Uncapped	R 669
10/10	Uncapped	R 769
20/2	200	R 849
20/20	Uncapped	R 799
20/20	Uncapped	R 899
50/5	Uncapped	R1 049
50/50	200	R 899
50/50	400	R 949
50/50	Uncapped	R 1 099
100/10	Uncapped	R 1 199
100/100	500	R 1 149
100/100	Uncapped	R 1 249

Source: ICASA Database based on Tariff Notifications

It is worth pointing out that five packages had a price increase from their standard prices analysed in 2.7.2.3. The 100GB 10/2Mbps increased from R 559 to R 649, uncapped 10/2Mbps increased from R 619 to R 669, 10/10Mbps increased from R 669 to R 769, 20/2Mbps increased from R 806.01 to R 849 and the 50/5Mbps increased from R 1 007.76 to R 1 049. Fair usage policy applies on the packages, as stipulated in the Vodacom Fibre terms and conditions³⁰.

3. Conclusion

Vodacom's introduction of standard and promotional integrated bundles is observed by the Authority as a competitive strategy to retain existing customers and attract new ones. Integrated bundles like the Power Hour + WhatsApp Bundles, Just 4 You Bundles and Power Bundles benefit customers with reduced effective rates.

The Authority's initiatives to address high data charges has had a positive effect on consumer welfare. Since the EUSSC Amendment Regulations 2019 came into effect, the Authority has seen a reduction in OOB data rates by Vodacom and MTN, which could be explained by Regulations amendment. The operators have

³⁰ Available on: < <https://www.vodacom.co.za/vodacom/terms/fibre/vodacom-fibre> > Accessed on 30 July 2019.

amended their prepaid OOB data rates, since the publishing of the 2018/19 FY Q2 Bi-Annual Report, from R 0.99 per MB to R 0.49 per MB (50.5% less).

The Authority perceives the introduction of Vodacom's Just 4 You voice bundles, MTN PAYG Night Voice Bundles, the addition of MTN Promotional All-Net Voice and the introduction of the MTN Double Your Bundle promotion as the MNOs' competitive response to the increased usage of OTT services for communication.

The Authority will continue to monitor and publish this report with retail market prices to ensure that subscribers have information on the competitive rates which are prevailing in the market.

4. References

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< <https://www.manxtelecom.com/support/mobile/number-portability/on-net-and-off-net>> [Accessed on 07 August 2019].

ITU. (2010). *Definitions of World Telecommunication/ICT Indicators*, Geneva: International Telecommunications Union (ITU)

Kholoud Dorgham, M. S, 2015. ResearchGate. [Online] Available at: https://www.researchgate.net/publication/277669260_A_Novel_Dynamic_Pricing_Model_for_the_Telecommunications_Industry [Accessed 17 July 2019].

Annexure A: List of Other³¹ Tariff Notifications Filed During the Period Under Review

TARIFF PLAN	EXPLANATION OF THE TARIFF PLAN	RELEVANT DATES	PRICING/PRODUCT/PACKAGE INFORMATION	STATUS																					
Cell C extension of Extra GIG promotion	Cell C Extra GIG promotion replaced 1 day and 30-day data bundle promotion.	Filed Date: 05 November 2018 Extension Date: 17 January 2019 Decommission Date: 31 August 2019	Data bundles allocation and pricing of 1 day and 30-day data bundle promotion applied in this promotion.	Ongoing as at 30 June, however it is to be decommissioned on 31 August 2019.																					
Cell C Sakeng prepaid tariff plan	Sakeng amended the price of its various data, voice and SMS bundles.	Filed Date: 05 December 2018 Amendment Date: 23 January 2019	<p><i>Table 52: Sakeng Voice, Data and SMS Bundles</i></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #00B050; color: white;"> <th style="text-align: center;">Bundle</th> <th style="text-align: center;">Validity</th> <th style="text-align: center;">Price</th> </tr> <tr style="background-color: #00B050; color: white;"> <th colspan="3" style="text-align: center;">Data Bundles</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Sakeng 25MB</td> <td style="text-align: center;">30 Days</td> <td style="text-align: center;">R 5.50</td> </tr> <tr> <td style="text-align: center;">Sakeng 50MB</td> <td style="text-align: center;">30 Days</td> <td style="text-align: center;">R 9.50</td> </tr> <tr> <td style="text-align: center;">Sakeng 100MB</td> <td style="text-align: center;">30 Days</td> <td style="text-align: center;">R 17</td> </tr> <tr> <td style="text-align: center;">Sakeng 250MB</td> <td style="text-align: center;">30 Days</td> <td style="text-align: center;">R 37</td> </tr> <tr> <td style="text-align: center;">Sakeng 500MB</td> <td style="text-align: center;">90 Days</td> <td style="text-align: center;">R 88</td> </tr> </tbody> </table>	Bundle	Validity	Price	Data Bundles			Sakeng 25MB	30 Days	R 5.50	Sakeng 50MB	30 Days	R 9.50	Sakeng 100MB	30 Days	R 17	Sakeng 250MB	30 Days	R 37	Sakeng 500MB	90 Days	R 88	Ongoing as at 30 June 2019
Bundle	Validity	Price																							
Data Bundles																									
Sakeng 25MB	30 Days	R 5.50																							
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Sakeng 250MB	30 Days	R 37																							
Sakeng 500MB	90 Days	R 88																							

³¹ Other tariff notifications filed or received during the period under review that were in existence as at end of 31 December 2018 which were not discussed/mentioned in the main part of this report

			<table border="1"> <tr> <td>Sakeng 1GB</td> <td>90 Days</td> <td>R 125</td> </tr> <tr> <td>Sakeng 2GB</td> <td>90 Days</td> <td>R 225</td> </tr> <tr> <td>Sakeng 3GB</td> <td>90 Days</td> <td>R 290</td> </tr> <tr> <td colspan="3" style="text-align: center;">SMS Bundles</td> </tr> <tr> <td>Sakeng 25 SMS</td> <td>90 Days</td> <td>R 6.25</td> </tr> <tr> <td>Sakeng 50 SMS</td> <td>90 Days</td> <td>R 11</td> </tr> <tr> <td>Sakeng 250 SMS</td> <td>90 Days</td> <td>R 50</td> </tr> <tr> <td colspan="3" style="text-align: center;">Voice Bundles</td> </tr> <tr> <td>Sakeng 15 Minutes Voice</td> <td>30 Days</td> <td>R 13</td> </tr> <tr> <td>Sakeng 30 Minutes Voice</td> <td>30 Days</td> <td>R 25</td> </tr> <tr> <td>Sakeng 45 Minutes Voice</td> <td>30 Days</td> <td>R 37</td> </tr> <tr> <td>Sakeng 60 Minutes Voice</td> <td>30 Days</td> <td>R 48</td> </tr> </table> <p><i>Source: ICASA Database based on Tariff Notifications</i></p>	Sakeng 1GB	90 Days	R 125	Sakeng 2GB	90 Days	R 225	Sakeng 3GB	90 Days	R 290	SMS Bundles			Sakeng 25 SMS	90 Days	R 6.25	Sakeng 50 SMS	90 Days	R 11	Sakeng 250 SMS	90 Days	R 50	Voice Bundles			Sakeng 15 Minutes Voice	30 Days	R 13	Sakeng 30 Minutes Voice	30 Days	R 25	Sakeng 45 Minutes Voice	30 Days	R 37	Sakeng 60 Minutes Voice	30 Days	R 48	
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Sakeng 45 Minutes Voice	30 Days	R 37																																						
Sakeng 60 Minutes Voice	30 Days	R 48																																						
Vodacom Shake Every Day Promotion	The promotion is available to prepaid, hybrid and post-paid customers, being charged R 1 for each Shake.	<p>Filed: 05 March 2019</p> <p>Effective/ Launch Date: 15 March 2019</p> <p>Decommission Date: 05 February 2020</p>	<p>Customers can participate in the promotion through the latest version of the My Vodacom App and via *135*33# USSD code.</p> <p>With each Shake, customers stand a chance to win:</p> <ul style="list-style-type: none"> • voice, data, social data bundles and bonus airtime rewards; • digital content rewards (video streaming, music, games); • lifestyle rewards (discounted shopping vouchers); • cash prizes of up to R 50 000 weekly <p>Additional information is available on the licensee’s website by following the link below: https://www.vodacom.co.za/vodacom/summer/shake-everyday-terms-and-conditions</p>	Ongoing as at 30 June 2019																																				

Lasernet LTE-A and 3G	Lasernet amended LTE-A and 3G bonded Unit rental daily offerings.	Filed: 10 April 2019	<i>Table 53: LaserNet LTE-A and 3G Daily</i>		Ongoing as at 17 April 2019	
			Product Description			Price Per Day (Including VAT)
			3G Bonded Unit Rental			R 1 725
			LTE-A Unit Rental			R 1 725
			3G Data per GB			R 149.50
			LTE-A Data per GB			R 92
			3G or LTE-A Configuration, delivery and collection			R 2 875
			<i>Source: ICASA Database based on Tariff Notifications</i>			
Vodacom 25 Year Campaign	As part of celebrating 25 years, Vodacom offers promotional integrated bundles and rewards upon a customer purchasing qualifying bundles.	Filed: 14 May 2019 Effective/ Launch Date: 24 May 2019	Vodacom 25 Year Campaign offers customers integrated daily bundles of Power Hour minutes and 1GB WhatsApp data priced at R 11, and also rewards customers with a free bundle each time they purchase a data bundle marked with a star, through the tailor-made Just 4 You plan.		Ongoing as at 30 June 2019, however it is to be decommissioned on 31 August 2019.	
MWEB	MWEB FTTH Promotion	Filed: 07 June 2019 Effective/ Launch Date: 19 June 2019	The MWEB FTTH Promotion offered 2 months subscription free on any FTTH product, excluding Mitchells Fibre, when customers sign up with MWEB. The promotion is applicable to MWEB FTTH products and all 3 rd party fibre network providers.		Ongoing as at 30 June 2019, however it is to be decommissioned on 31 July 2019.	

Annexure B: Promotions that Ended During the Period Under Review

TARIFF PLAN	EXPLANATION OF THE TARIFF PLAN	RELEVANT DATES
Cell C 30-Day and 1-Day data bundle	The 1-day and 30-day promotion was available to all Cell C Prepaid, Hybrid and Post-paid customers through Cell C *147# USSD Menu, Cell C Web Portal and Cell C Mobile App, offering customers additional data at discounted price.	Filed: 24 October 2018 Amendment Date: 13 November 2018 Extension Date: 17 January 2019 Decommission Date: 31 March 2019
Vodacom Promotional Bundles	Vodacom offered 30-day once-off discounted bundles.	Filed: 28 January 2019 Effective/ Launch Date: 09 February 2019 Decommission Date: 01 July 2019.
MTN Moria Easter Promotion	The first 500 000 Moria attendees who purchased a Moria starter pack received free R 30 on-net bonus airtime within 7 days of activating the SIM. In addition, initial airtime voucher recharge of R 20 minimum rewarded customers with 50MB data bundle, 50 on-net voice minutes and 50 local SMS, all valid for 7 days.	Filed: 03 April 2019 Effective/ Launch Date: 15 April 2019 Decommission Date: 22 April 2019
MTN Mega Deals Easter Promotion	MTN introduced its Mega Deals Easter promotion through its Customer Value Management tool. The promotional offer was based on the customer's individual profile and spend.	Filed: 10 April 2019 Effective/ Launch Date: 19 April 2019

		Decommission Date: 22 April 2019
Cell C Daily data bundle Promotion	Cell C increased the price of daily data bundles promotion. It Increased the price of 500MB and 1GB from R 17.50 and R 20 respectively to R 25 and R 30 respectively.	Filed: 13 November 2018 Amendment Date: 12 April 2019 Decommission Date: 31 March 2019
MTN Freedom Day Promotion	MTN's Freedom Day promotional offer was available to customers on the 27 April 2019 through the *142# USSD code. The promotion offered 5GB data valid for one day for either R 25 or R 50 depending on the customer's spending patterns.	Filed: 15 April 2019 Effective/ Launch Date: 27 April 2019 Decommission Date: 27 April 2019
MTN Universal Bundle @40c	MTN's Universal Bundle @40c charged prepaid customers R 0.40 per MB from airtime upon data bundle depletion.	Filed: 26 April 2019 Effective/ Launch Date: 10 May 2019 Decommission Date: 17 May 2019
MTN Youth 1GB Promotion	MTN's Youth Day promotional offer rewarded the first 50 000 youth customers who opted into the Youth Pulse prepaid price plan with a 1GB social bundle.	Filed: 05 June 2019 Effective/ Launch Date: 16 June 2019 Decommission Date: Upon reaching 50 000 Youth Pulse subscribers