

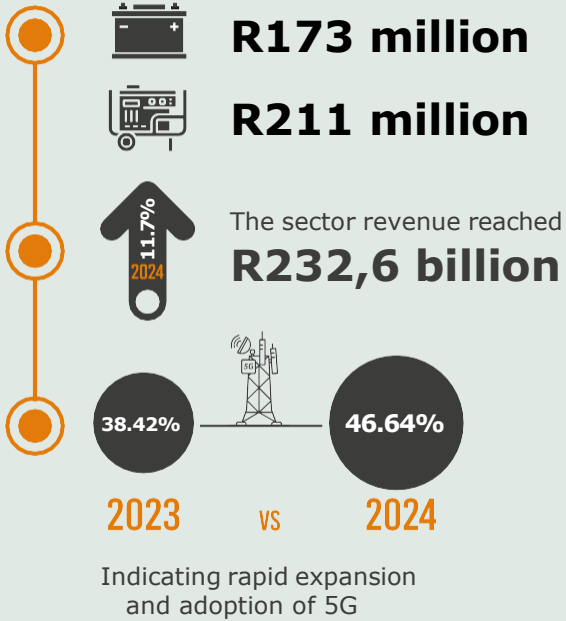


# The State of the ICT Sector Report of South Africa

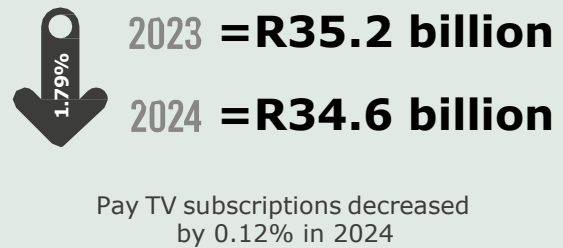
**31 March 2025**

# OVERVIEW OF THE ICT SECTOR

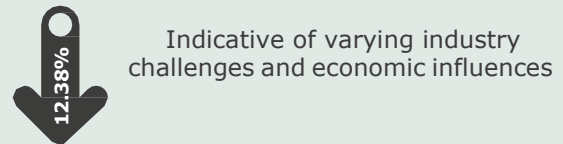
## Telecommunications



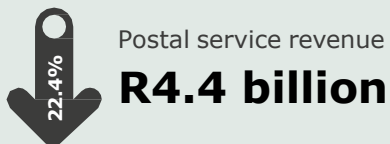
## Broadcasting



## Employment for all 3 sectors



## Postal



This demonstrates the rise of digital alternatives and the evolving preferences of customers

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## **EXECUTIVE SUMMARY**

The Independent Communications Authority of South Africa (“ICASA / the Authority”) is pleased to release the 10<sup>th</sup> annual State of Information, Communications and Technology (“ICT”) sector report.

The report reflects the Authority’s commitment towards access to ICT through the collating of comprehensive and timely ICT indicators to effectively regulate the broadcasting, postal services, and telecommunications sectors in South Africa. These indicators serve as essential benchmarks for sector policy research and help ensure alignment with global standards and data from other regulatory bodies. The report is compiled from the following data sources:

- Statistics South Africa’s (“Stats SA”) General Household Survey (“GHS”) 2023 report.
- International Telecommunication Union’s (“ITU”) 2023 and 2024 reports
- The State of the ICT Questionnaire, data collected through detailed questionnaires distributed to licensees by the Authority, covering the period from 01 October 2023 to 30 September 2024.
- Ookla Speedtest Global Index 2025 Report.
- Pricing data for voice, SMS, prepaid, post-paid bundles data and school connectivity was collected by the Authority in 2025.

The Authority received a total of one hundred and five (105) responses from the Electronic Communications Service (“ECS”) and Electronic Communications Network Service (“ECNS”) licensees, twenty-three (23) responses from television and radio broadcasters and, only seven (7) responses from postal sector operators. All the major operators have responded to the questionnaire.

**There is a growing dependence on cellular technology in South Africa, with ongoing disparities in access to telecommunication services across different provinces.**

The report provides a comprehensive analysis of the evolving trends within the ICT sector in South Africa. According to the latest findings from the Stats SA General Household Survey (GHS), there has been a notable increase in the proportion of households relying solely on cellular phones for communication, rising from 88.7% in 2022 to 91.2% in 2023. Conversely, the percentage of households that do not possess any telephone, whether cellular or landline, has seen a slight decline from 4.1% to 3.8% over the same period.

A closer examination of province-level data for 2023 reveals compelling insights: Mpumalanga emerged as the province with the highest reliance on cellular-only communication, boasting an impressive 96.1% of households fitting this category. In stark contrast, the Northern Cape recorded the lowest proportion of cellular-only households at 86.3%. Additionally, the Northern Cape also displayed the highest incidence of households completely lacking telephone service, with a concerning 10.1% of residences without any telecommunication options.

**The internet access distribution data across South African provinces in 2023 shows significant disparities.**

The percentage distribution data for internet access across South African provinces in 2023 reveals significant disparities, particularly in mobile and fixed connectivity. Mobile access remains the predominant means of connecting to the internet, with KwaZulu-Natal leading the provinces at an impressive 78.5%. This high figure underscores the province's reliance on mobile technology for internet connectivity. In contrast, the Eastern Cape exhibits the lowest mobile access rate at 67.2%, highlighting potential challenges in technological infrastructure or service availability. On a national scale, mobile connectivity is recorded at 72.6%, reflecting a strong preference for mobile devices as a means of internet access among South Africans.

When examining fixed internet access at home, the Western Cape emerges as the clear leader, boasting a rate of 40.1%. This figure suggests a well-established broadband infrastructure, which may be indicative of higher socio-economic conditions in the province. In stark contrast, Mpumalanga shows a mere 3.1% for fixed internet access, pointing to significant inequalities in internet availability and potentially limiting residents' opportunities for online engagement. The national average for fixed internet access at home sits at 14.5%, further emphasizing the gap between provinces and the need for improved connectivity solutions across the country.

**There is a strong demand for connectivity and the expansion of mobile network services, which have boosted revenue in the telecommunications sector. Meanwhile, the broadcasting and postal sectors face challenges in maintaining revenue streams in a digitized economy.**

In the year 2024, the combined revenue across the three regulated sectors (telecommunications, broadcasting, and postal services) experienced a notable growth of 9.01%. Telecommunications emerged as the primary contributor to this uptick, achieving an impressive revenue increase of 11.70%. This growth was primarily propelled by a substantial 10.21% surge in mobile services, reflecting a strong demand for connectivity and the expansion of mobile network offerings. Additionally, fixed internet and data services saw a remarkable increase of 14.62%, highlighting a significant shift towards more robust and high-speed internet solutions among consumers and businesses alike.

In contrast, the broadcasting sector faced challenges as its revenue contracted by 1.79%. This decline indicates a potential shift in consumer preferences or increased competition from alternative media sources. Meanwhile, the postal services sector suffered a severe downturn, with revenue plummeting by 22.40%. This sharp decline could be attributed to the ongoing digital transformation, which has significantly reduced the demand for traditional mail services.



Examining the broader trends over a five-year span from 2020 to 2024, telecommunications achieved a Compound Annual Growth Rate (CAGR) of 3.69%. This consistent growth underscores the sector's resilience and adaptability in an ever-evolving technological landscape. Conversely, both the broadcasting and postal services sectors saw negative trends, with broadcasting recording a CAGR decrease of 0.84% and postal services experiencing a more pronounced decline with a CAGR of 7.1%. These figures emphasize the growing challenges faced by these sectors in maintaining revenue streams in a digitized economy.

**Despite advancements in ICT, South Africa still struggles with broadband quality compared to other countries, highlighting the need for further improvements to match leading global markets.**

The report offers a comprehensive overview of the broader ICT investment landscape and its performance metrics. One of the standout trends is the notable 7.46% increase in mobile cellular subscriptions during 2024, bringing the total to an impressive 116.8 million. Concurrently, smartphone<sup>1</sup> subscriptions experienced a significant surge, rising by 10.36% to reach 82.7 million.

In the realm of fixed broadband, subscriptions displayed remarkable progress, from 1.4 million to 2.7 million, driven primarily by the rapid adoption of fibre-optic solutions that provide enhanced speed and reliability. Over the period from 2020 to 2024, the national active mobile subscriptions also demonstrated strong growth, achieving a compound annual growth rate (CAGR) of 10.05%. Additionally, the capacity for international internet bandwidth expanded by 10.10%, reaching an impressive 3.2 million Megabits per second (Mbps).

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<sup>1</sup> A smartphone is a mobile phone with advanced features: it has Wi-Fi connectivity, web browsing, capabilities, a high-resolution touchscreen display and the ability to use apps. The majority use one of the following mobile operating systems: Android, Symbian, iOS, Blackberry OS and Windows Mobile

However, despite these advancements in the ICT sector, South Africa still grapples with challenges regarding the quality of its broadband services. As of 2025, fixed broadband speeds average 48.51 Mbps, placing the country at a global ranking of 52nd. Mobile broadband speeds in South Africa average 49.81 Mbps, placing the country 61st in global rankings. These figures highlight the ongoing need for improvements to reach the standards of leading global markets.

**The telecommunications sector reported financial losses of R283 million due to theft and vandalism.**

In 2024, the telecommunications sector faced substantial infrastructure challenges primarily due to rampant theft and vandalism, leading to staggering financial losses estimated at R69.59 million for theft and an additional R213.83 million attributed to vandalism. These setbacks not only disrupted operations but also underscored the pressing need for enhanced security measures.

**The spending on generators and batteries in the telecommunications sector decreased due to the load-shedding mitigation plan implemented by Eskom.**

Measures to mitigate load-shedding resulted in a dramatic reduction in expenditure on backup power solutions. In 2024, spending on battery backups saw a steep decline, plummeting from R2.59 billion to R173.75 million. This reduction was reflected in the number of battery units purchased, which fell sharply from 150,415 to just 44,708 units.

Similarly, the investment in generator systems also experienced a noteworthy downturn, with expenditures dropping from R930.21 million to R211.47 million. The number of generators purchased saw a significant reduction, decreasing from 3,268 units to a mere 855.

These improvements align with Eskom’s initiatives to address load-shedding, leading to enhanced resilience and overall lower operating expenses, remarkably demonstrating clear sector-wide financial relief. This strategic initiative has not only alleviated the need for costly backup power solutions but also enhanced operational efficiency across the industry.

**Telecommunications operators generated R159.3 billion in revenue from customers using their services to access social media platforms.**

In 2024, the telecommunications sector in South Africa experienced remarkable growth, fuelled by a surge in fibre subscriptions, heightened engagement on social media platforms, and substantial advancements in network coverage. The sector's transformation was primarily driven by fibre-based solutions, which became a pivotal area of expansion. Fixed broadband subscriptions skyrocketed, from 1.4 million in 2023 to an impressive 2.7 million by the end of 2024. Notably, fibre-to-the-home and fibre-to-the-building subscriptions witnessed a phenomenal increase, jumping from 1.0 million to 2.4 million. This surge contributed a staggering R6.5 billion in revenue, underscoring the growing reliance on high-speed internet connectivity.

Moreover, revenue generated by telecommunications operators through social media platforms emerged as a significant driver of digital engagement. In 2024, revenue from these platforms reached an astounding R159.3 billion, with major players such as Facebook, WhatsApp, and TikTok leading the charge. Specifically, Facebook accounted for R58.9 billion, followed closely by WhatsApp at R49.2 billion and TikTok at R38.9 billion. This substantial revenue growth highlights the strategic importance of social media as a vital channel for communication, advertising, and customer interaction, further reinforcing its role in the overall telecommunications landscape in South Africa.

**The overall 5G coverage is currently at 46.64%, but more must be done to ensure that no one is left behind.**

Continued advancements in coverage have significantly bolstered digital inclusivity across the nation. The national coverage for 3G networks has reached an impressive 99.79%, while 4G/LTE coverage stands at 99.07%. This extensive reach has greatly enhanced mobile connectivity and accessibility for a vast majority of the population.

In terms of broadband access, the geographical coverage has significantly expanded to include 82.06% of the country's landmass, marking a substantial improvement in connectivity. However, there remain several remote and underserved areas where internet access is still unavailable. This gap highlights the ongoing need for investment and development to ensure that every citizen can participate in the digital economy. Bridging these gaps is essential to maximize the benefits of technological advancement and to ensure that no community is left behind in this digital transformation. The spectrum auctioned in March 2022 is expected to play a crucial role in helping network operators expand their coverage to underserved rural and remote areas, bridging the digital divide and fostering greater social and economic inclusion.

Despite the overall 5G coverage sitting at 46.64%, urban centres in the Western Cape have seen remarkable progress, achieving a robust 78% 5G coverage. This achievement underscores the regional advancements in next-generation connectivity, illustrating a commitment to fostering a more connected and digitally inclusive society.

**The total employment in the telecommunications sector experienced a slight decline**

Over the five-year period from 2020 to 2024, total employment in telecommunications fell by 2.84%. Male employment saw a decline of 3.23%, whereas female employment experienced a smaller decrease of 2.18%.

## **Over the past five years, there has been a decline in pay TV subscriptions attributed to increasing competition from digital streaming platforms**

In 2024, South Africa's broadcasting sector faced a noticeable contraction, with total revenue declining by 1.79%, resulting in a total of R34.6 billion. This downturn was particularly evident in broadcasting subscriptions revenue, which suffered a significant decline of 5.10%, dropping to R26.2 billion. In contrast, the advertising revenue sector exhibited remarkable resilience, increasing by 6.73% to reach R6.2 billion, signalling a shift in the revenue dynamics of media consumption.

Within the pay TV subscription arena, there was a marginal increase of 0.12%, with subscriptions rising slightly from 7.41 million in 2023 to 7.42 million in 2024. Despite this modest uptick in subscriptions, an analysis of the five-year trend spanning from 2020 to 2024 reveals a broader decline in this segment. This downturn is largely attributed to escalating competitive pressures from digital streaming platforms, which have been steadily capturing market share. The CAGR for this period reflects a concerning negative trend of 2.45%, underlining the need for traditional broadcasters to adapt their strategies in response to the evolving landscape of media consumption.

### **The key employment highlights in the broadcasting sector.**

In 2024, the broadcasting sector showcased a commendable level of inclusivity, particularly among the youth demographic, which included 526 females and 441 males under the age of 35 years. This representation reflects a positive trend in attracting young talent to the industry. Within the workforce, skilled workers continued to dominate, with a notable total of 2,533 individuals engaged in specialized roles that demand a high level of expertise and training.

The number of Black individuals in leadership positions experienced only a modest increase of 2.33%, indicating that progress in diversifying top management remains limited. Disturbingly, the representation of Black females in leadership roles saw a concerning decline of 8.33%, highlighting persistent barriers to achieving gender equity within the highest echelons of management.

**The postal sector experienced a decline in revenue, mail volumes, and jobs, attributed to, inter alia, competition from digital communication and restructuring efforts.**

In 2024, the postal sector suffered a significant revenue decline of 22.40%, resulting in total earnings dropping to R34.6 billion. This downturn was accompanied by a substantial loss of employment, with a total reduction of 5,733 positions, bringing the workforce down from 15,303 employees to just 9,570.

A closer examination of the employment statistics reveals that male workers accounted for a loss of 2,729 jobs, whereas female workers experienced an even greater decrease of 3,004 jobs, indicating a disproportionate impact on female employment within the sector.

This challenging landscape was largely attributed to the ongoing decline in traditional mail volumes, as an ever-increasing reliance on digital communication tools continued to reshape consumer behaviour. Meanwhile, courier services strategically capitalized on the surge in e-commerce, utilizing advancements in logistics and distribution to enhance their offerings. This shift not only improved their market efficiency but also created formidable competition for traditional postal services, which struggled to adapt to these evolving dynamics in the industry.

In 2024, letter delivery services experienced a significant decline, plummeting from 250.8 million to just 152.9 million. This dramatic reduction underscores a growing trend away from traditional mail communication. Similarly, the parcel delivery segment saw a notable decrease, with volumes dropping from 17.6 million to a mere 3.3 million, reflecting a shift in consumer preferences and possibly the impact of enhanced digital alternatives.

Express delivery services were not immune to this trend, facing a modest contraction of 1.71%. Despite the decrease in domestic volumes, international demand for express delivery services surprisingly remained relatively stable, indicating that while local usage is declining, the global market is still relying on expedited shipping/ mail options.

Additionally, the number of PO Boxes and rented physical addresses has also witnessed a decline. This decline can be attributed to an increasing number of customers turning to digital solutions for their communication and mail/ shipping needs, highlighting a broader transition toward more efficient, technology-driven alternatives. Overall, these trends suggest a significant transformation within the delivery services landscape, propelled by advancements in technology and changing consumer habits.

## **1 INTRODUCTION**

The State of the ICT report reports on the performance and developments of the ICT sector, namely telecommunications, broadcasting and postal services. ICASA regulates these three sectors in the public interest to ensure growth and compliance. The report provides analysis, whilst presenting key insights on various factors, including financial performance, employment trends, and subscription statistics. This detailed analysis aims to offer valuable information on the state and progress of the ICT sector, serving as a resource for stakeholders and decision-makers to understand the industry's current dynamics and regulatory environment.

This report aims to provide up-to-date and accurate information to assist stakeholders in making informed decisions about the ICT sector. By detailing current trends and regulatory developments, the report serves as a valuable resource for businesses, policymakers, and other interested parties engaged in the ICT sector in South Africa. Through this information, stakeholders can better navigate the market, address challenges, and capitalize on emerging opportunities.

### **ICASA Mandate**

ICASA is an independent regulatory body and derives its mandate from the Constitution of the Republic of South Africa, 1996 ("Constitution"), the Independent Communications Authority of South Africa, 2000 (Act No. 13 of 2000) ("ICASA Act"), the Broadcasting Act, 1999 (Act No. 4 of 1999) ("Broadcasting Act"), the Electronic Communications Act, 2005 (Act No. 36 of 2005) ("ECA"), and the Postal Services Act, 1998 (Act No. 124 of 1998) ("Postal Act").

As part of its mandate, the Authority is responsible for collecting statistical information on the ICT sector to monitor its performance, generate reports, and ensure that policies and regulations are grounded in accurate and evidence-based data. This essential task supports effective governance and helps address emerging trends and challenges within the sector.



ICASA is also tasked with ensuring that all South Africans have access to affordable and high-quality ICT services. This responsibility involves promoting universal service access, fostering competition among service providers, and encouraging innovation to improve service delivery. By prioritizing inclusivity and affordability, ICASA aims to bridge the digital divide and contribute to a more connected and economically empowered society. Through its regulatory efforts, ICASA strives to create a balanced and progressive ICT landscape that benefits all stakeholders.

## **Methodology**

In terms of section 4(3)(g) of the ICASA Act, ICASA has the mandate to request and obtain specific information and data from all licensees as required by the Authority at any given time. The Authority makes use of questionnaires as a primary data collection tool where telecommunications, broadcasting and postal service operators submit information on ICT indicators. The questionnaires are customized for ECS, ECNS, Television and Radio Broadcasters, as well as Postal service operators. The questionnaires cover data over a 12-month period ending on 30 September of each year, unless otherwise specified. For confidentiality reasons, the information gathered is aggregated to conceal stakeholder-specific information.

The Authority conducts extensive data validation, data pre-processing and analysis using various statistical tools for interpretation, discovery and communication of patterns and trends within the data. The primary aim of conducting this analysis is to draw meaningful insight from the collected data for the purposes of narrating the South African state of the ICT sector.

## Limitations

The following possible limitations to the report should be borne in mind when interpreting the information collected:

- The unreserved postal sector always had a low response rate to the questionnaire; and
- the data contained in the report is self-reported by licensees, which therefore requires a more rigorous data-validation process.

## Structure of the report

The report is structured as follows:

**Section 1** details the introduction, ICASA mandate, methodology, and limitations of the report.

**Section 2** presents information collected by Stats SA, including ICT information from the General Household Survey report.

**Section 3** looks at the comprehensive ICT information collected by the Authority. The information is broken down into three segments, namely, revenue, procurement and employment for the three sectors holistically and presented in each sector.

**Section 4** looks at the Telecommunications sector.

**Section 5** takes a glance into the Broadcasting sector.

**Section 6** delves into the Postal Services sector.

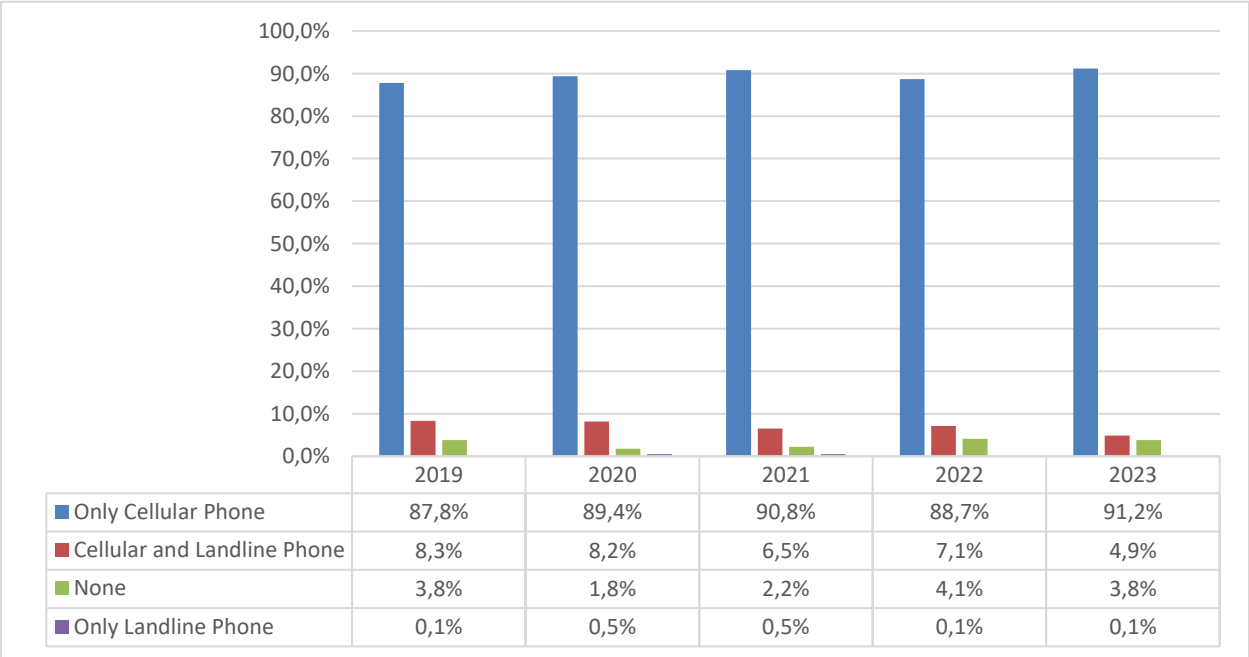
**Section 7** provides a conclusion of the full report with key takeaways on the overall results and performance of the ICT sector.

## 2 THE ICT SECTOR INFORMATION AS REPORTED BY STATISTICS SOUTH AFRICA

The State of the ICT Sector Report of South Africa is released annually on or before March 31<sup>st</sup>, one year before Stats SA's GHS report.

The GHS report illustrates trends in household access to voice communication services in South Africa from 2019 to 2023. Households with only landlines remained consistent at 0.1% in both 2022 and 2023. The proportion of households without a cell phone or landline decreased from 4.1% in 2022 to 3.8% in 2023, suggesting improved access to communication services. The share of households with both cellular and landline phones dropped from 7.1% in 2022 to 4.9% in 2023. This is a result of, households with only cellular phones that rose from 88.7% in 2022 to 91.2% in 2023.

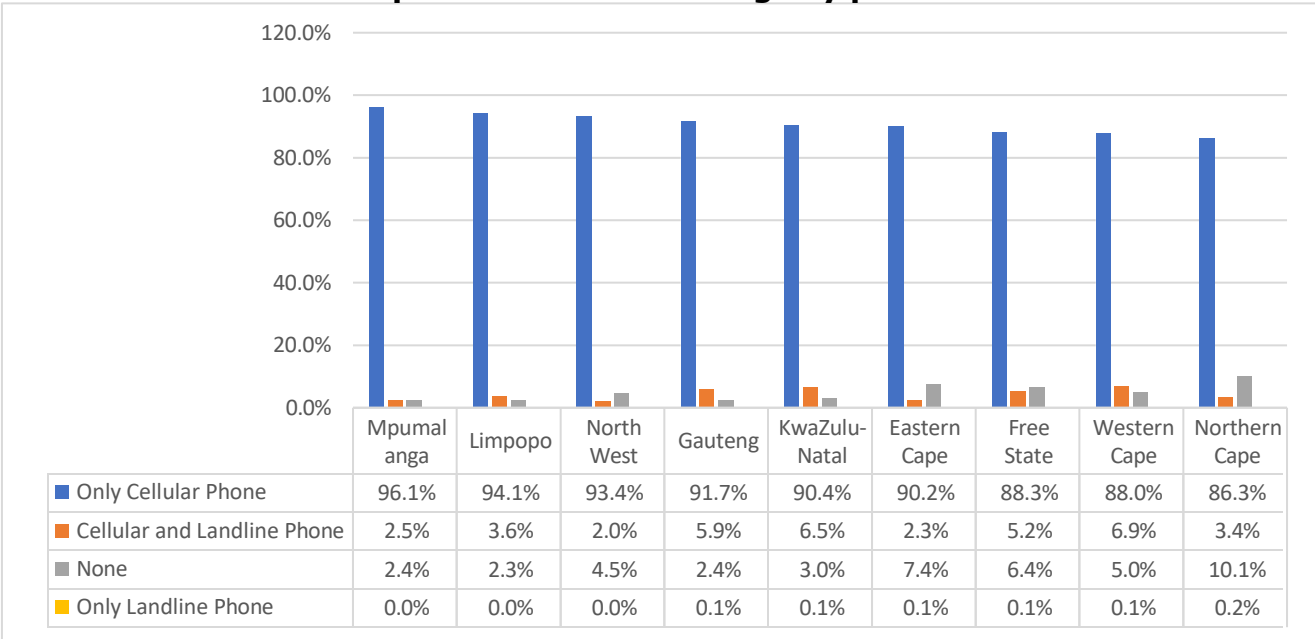
**Graph 1: Proportion of households who have a functional landline and/or cellular telephone in the Republic of South Africa from 2019 to 2023.**



Source: StatsSA GHS, 2019- 2023.

According to the GHS report, in 2023, Mpumalanga province had the highest proportion of households using only cellular phones at 96.1%, followed by Limpopo at 94.1%, while Northern Cape had the lowest at 86.3%. For households with no access to either a cellular phone or a landline, Northern Cape had the highest proportion at 10.1%, and Limpopo had the lowest at 2.3%. In the same year, the provinces with households with only landline phones were Gauteng, KwaZulu-Natal, Eastern Cape, Free State, Western Cape, and Northern Cape, with percentages ranging from 0.1% to 0.2%.

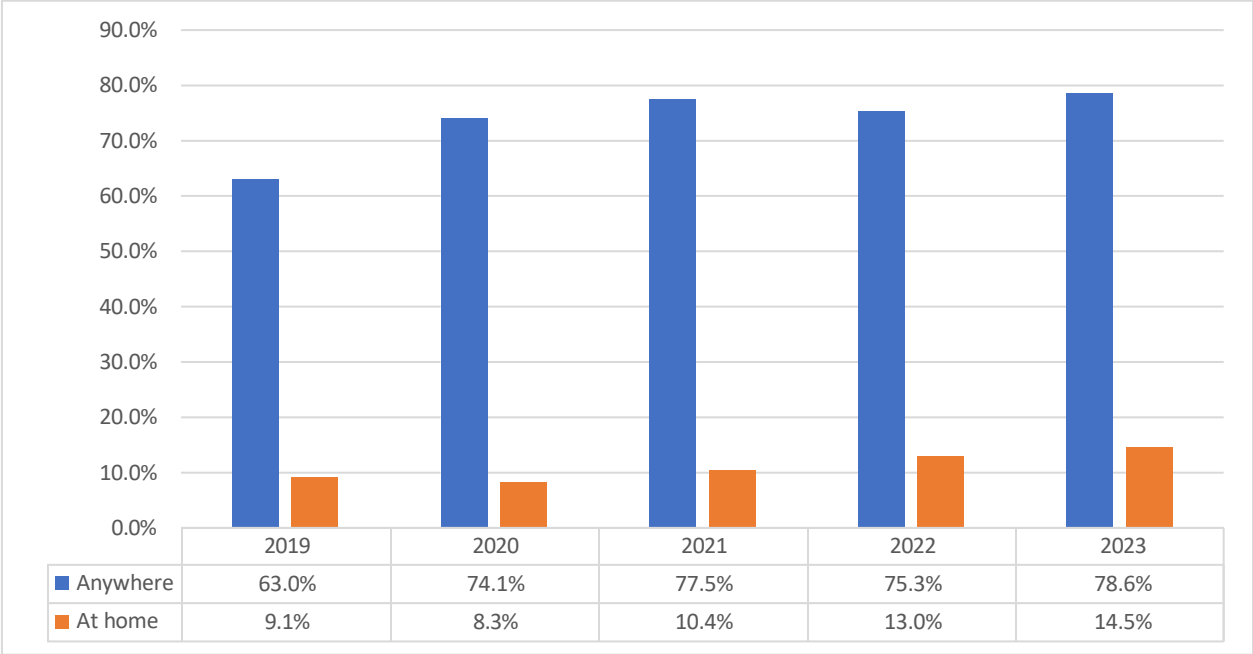
**Graph 2: Percentage of Households who have functional landline and cellular telephone in their dwellings by province for 2023.**



Source: StatsSA GHS, 2023.

According to the GHS, the national percentage of households with internet access from any location increased from 75.3% in 2022 to 78.6% in 2023, reflecting a 3.3% rise. Additionally, the proportion of households with internet access, specifically at home slightly increased from 13% in 2022 to 14.5% in 2023. The modest growth can be attributed to the continued reliance on mobile internet access rather than fixed-line connections, possibly due to limited infrastructure in certain areas.

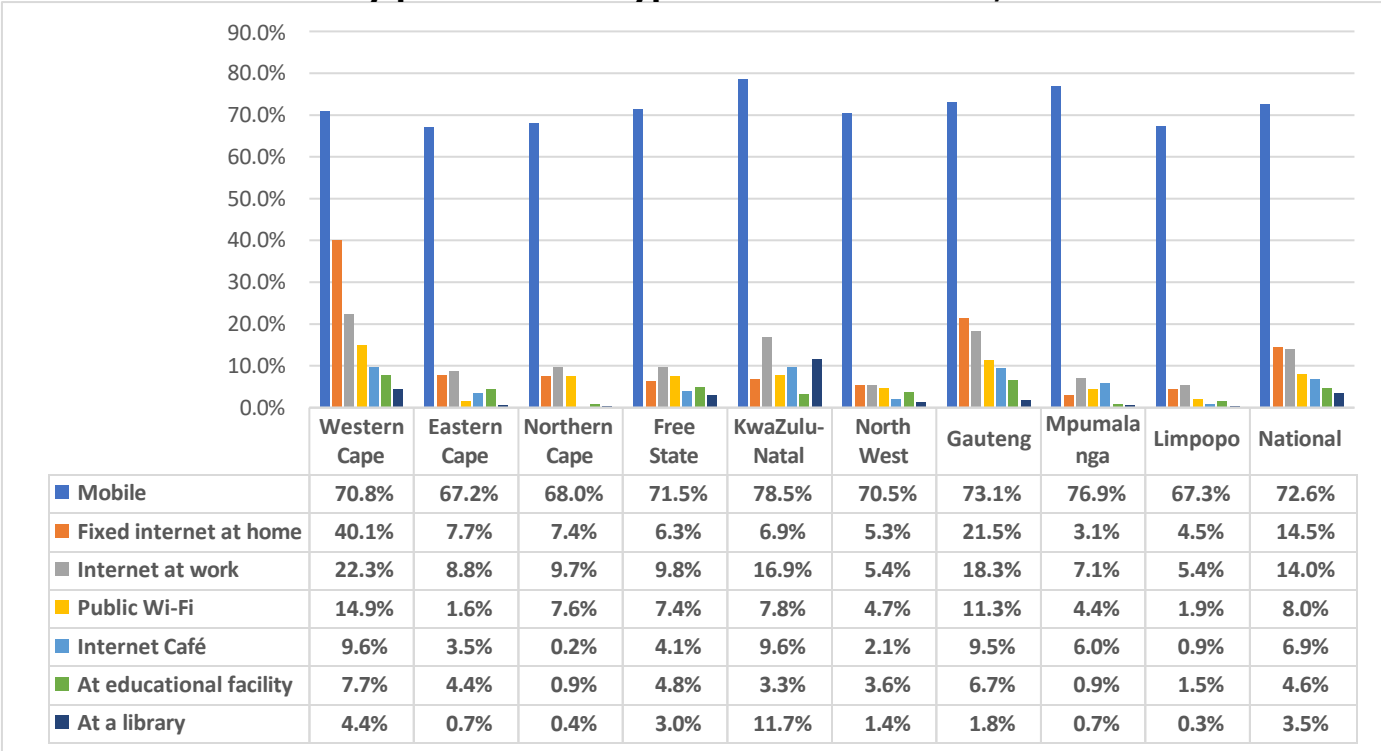
**Graph 3: Percentage of Households with access to the Internet at home, or for which at least one member has access to or used the Internet nationally in 2023.**



Source: StatsSA GHS, 2019 - 2023.

The percentage distribution data highlights internet access across South African provinces in 2023. Mobile access continues to dominate, with KwaZulu-Natal leading at 78.5% and Eastern Cape at the lowest at 67.2%, while mobile connectivity at the national level is at 72.6%. Fixed internet access at home is highest in the Western Cape at 40.1%, while it is lowest in Mpumalanga at 3.1%, with a national average of 14.5%.

**Graph 4: Percentage (%) distribution of households with access to the Internet by province and type of internet access, 2023**



Source: StatsSA GHS, 2023.

### 3 ICT DATA COLLECTED BY ICASA

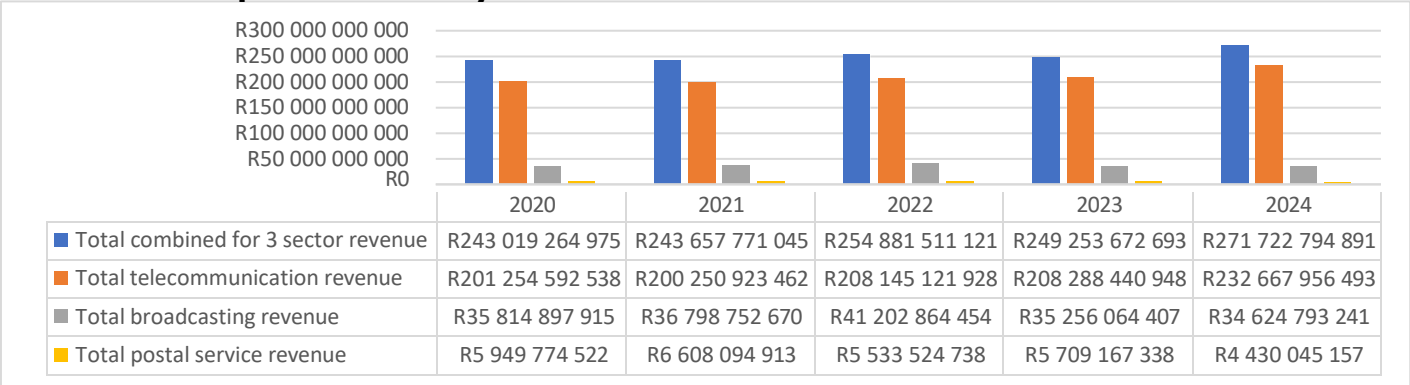
This section reports on the aggregated data that was collected by ICASA through the ICT industry questionnaires sent to licensees in November 2024.

#### 3.1 Revenue for the three sectors regulated by ICASA

The combined revenue for the three sectors increased by 9.01% in 2024, driven largely by an 11.70% increase in telecommunication revenue. This surge is attributed to the rapid adoption of mobile technologies, increased internet penetration, and the rollout of 4G and 5G networks to support digital services. Additionally, the growth in e-commerce and remote working enhanced the demand for broadband services. However, broadcasting revenue saw a marginal decline of 1.79%, reflecting the shift towards digital streaming platforms and declining traditional media viewership. The postal sector experienced the sharpest decrease, plummeting by 22.40%, as electronic communication and courier services are increasingly replacing traditional mail.

Over the five-year period, the CAGR for revenue of the three sectors was at 2.83%. The telecommunications sector achieved the highest growth at 3.69%, while broadcasting sector slightly contracted by 0.84% and, the postal sector faced the sharpest decline at 7.1%.

**Graph 5: Total revenue of the 3 sectors, for the 12 months ending 30<sup>th</sup> September each year**



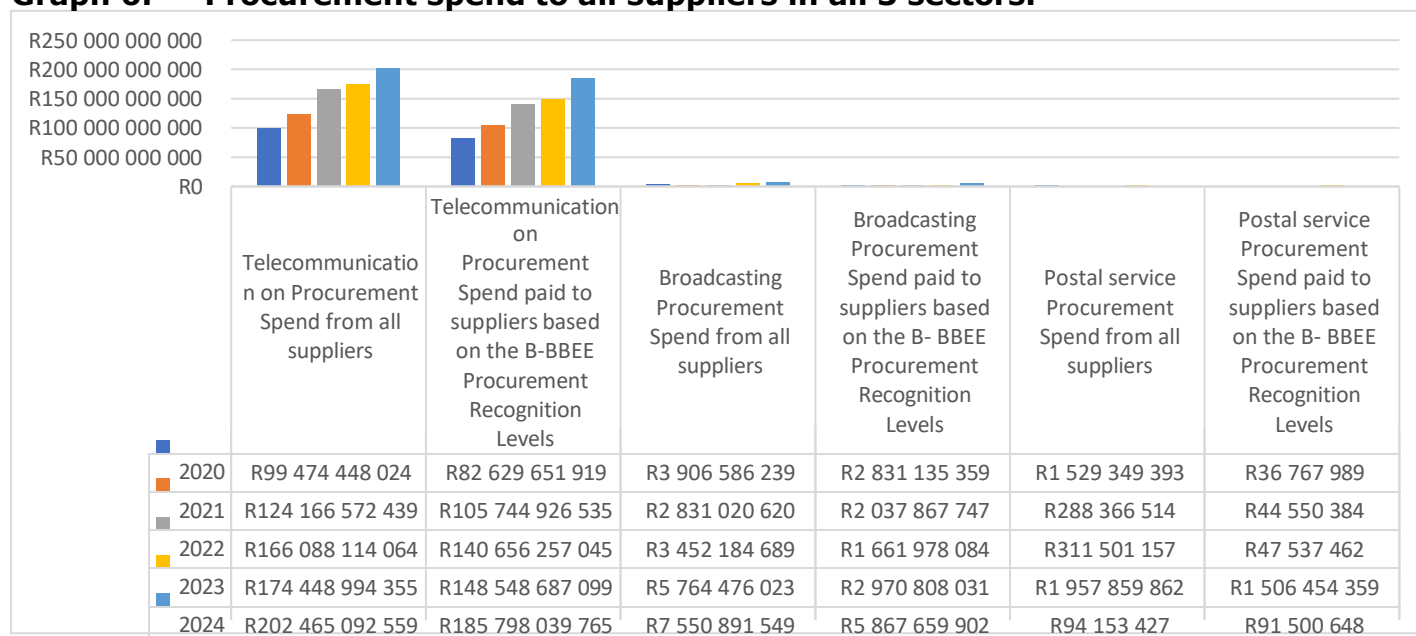
Source: ICASA Electronic Telecommunications, Broadcasting and Postal Questionnaire 2020 – 2024.

### 3.2 Procurement spend to all suppliers in all 3 sectors.

The Broad-Based Black Economic Empowerment (“B-BBEE”) program aims to address economic disparities by promoting inclusive procurement practices. The data reveals substantial efforts across the telecommunications, broadcasting, and postal services to support suppliers aligned with B-BBEE requirements. Over the five-year period, the percentage of procurement spend paid to B-BBEE-compliant suppliers shows a strong performance, indicating progress in adhering to transformation objectives.

The telecommunications sector reported an impressive 91.77% B-BBEE procurement spend in 2024, reflecting its proactive approach to transformation. Broadcasting procurement spend on B-BBEE-compliant suppliers was 77.71%, highlighting a relatively consistent but slightly lower commitment compared to telecommunications. The postal service sector demonstrated a remarkable 97.18% spend on B-BBEE-compliant suppliers in 2024, showcasing a significant alignment with empowerment goals.

**Graph 6: Procurement spend to all suppliers in all 3 sectors.**



Source: ICASA Electronic Communications, Broadcasting and Postal Questionnaires, December 2020 – 2024.

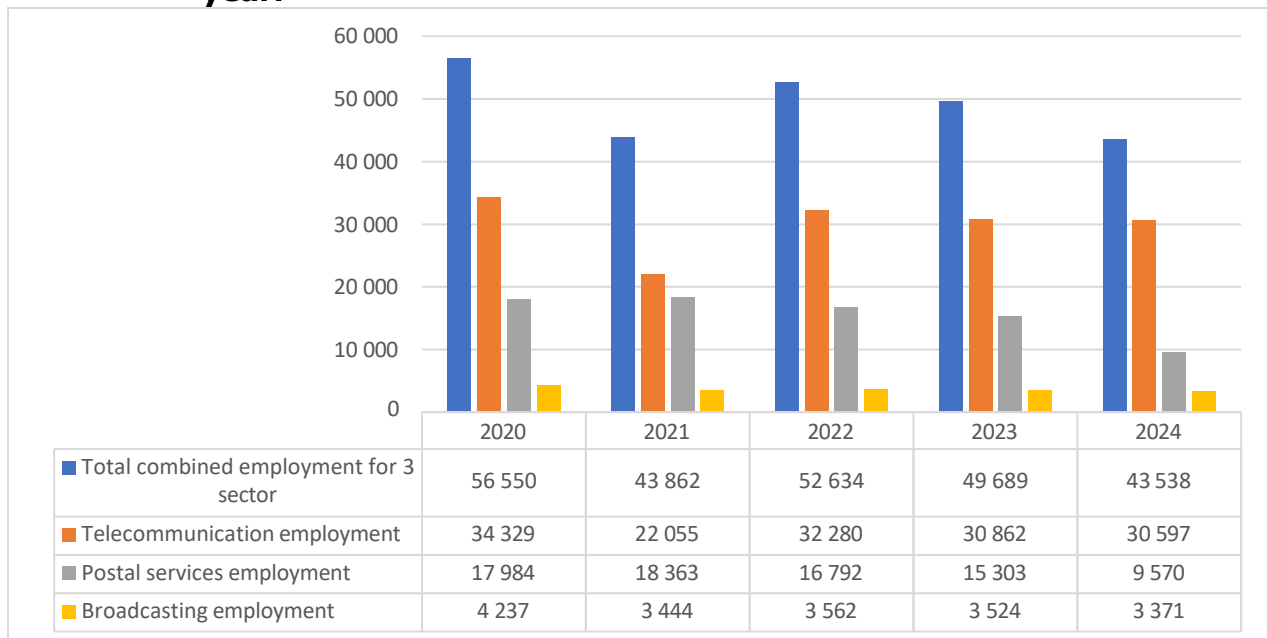


### 3.3 Employment levels for the three sectors

In 2024, the combined employment across the telecommunications, postal, and broadcasting sectors decreased by 12.38%. The telecommunications employment saw a modest decline of 0.86%. Postal services employment decreased dramatically by 37.46%, driven by declining mail volumes and the rise of digital communication alternatives. The significant reduction underscores the industry's ongoing struggle to remain relevant in a digital economy. Broadcasting employment experienced a 4.34% decrease. This decline is primarily influenced by technological advancements and market shifts.

The CAGR over the five-year period shows a 6.33% decline in total employment across the three sectors. Telecommunications employment decreased by 2.84%, broadcasting employment decreased by 5.56%, and postal services experienced the steepest decline at 14.59%.

**Graph 7: Total employment for the 3 sectors, as of 30<sup>th</sup> September each year.**



Source: ICASA Electronic Communications, Broadcasting and Postal Questionnaires 2020 – 2024.

## 4 TELECOMMUNICATIONS SECTOR

In 2024, ICASA published the Final Call Termination Amendment Regulations reducing wholesale voice termination rates for both fixed and mobile services, aiming to lower the costs to communicate<sup>2</sup>. Additionally, ICASA is developing a new licensing framework for satellite services<sup>3</sup> to streamline procedures for satellite operators entering the South African market, thereby enhancing service offerings for licensees. These initiatives reflect ICASA's commitment towards fostering for a more competitive and accessible telecommunications environment in South Africa.

In 2022, the Authority played a pivotal role in transforming the telecommunications landscape by implementing forward-thinking policies and regulatory measures. Understanding the growing demand for reliable and affordable digital services, ICASA prioritized spectrum allocation, enabling operators to expand their networks and improve service delivery. The auctioning of additional spectrum bands for 4G and 5G networks allowed operators to increase coverage and deliver faster, more efficient broadband services to both urban and rural areas.

In 2023, ICASA introduced amendments to the End User and Subscriber Charter Regulations<sup>4</sup>. These amendments included additional quality of service parameters for ECS, as well as adjustments to some existing parameters. These changes enable the Authority to effectively monitor and enforce compliance with customer care standards in response to the evolving environment.

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<sup>2</sup> Call Termination Regulations, 2024 <<https://www.icasa.org.za/legislation-and-regulations/call-termination-amendment-regulations-2024>>

<sup>3</sup> Consultation on the proposed new Licensing for Satellite Services, 2024 <[https://www.gov.za/sites/default/files/gcis\\_document/202408/51044gen2678.pdf](https://www.gov.za/sites/default/files/gcis_document/202408/51044gen2678.pdf)>

<sup>4</sup> End-User and Subscriber Services Charter Amendment Regulations, 2023 <<https://www.icasa.org.za/legislation-and-regulations/end-user-and-subscriber-service-charter-fourth-amendment-regulations-2023>>

The ICT sector's evolution has introduced new market structures, business models, and revenue streams, along with both opportunities and challenges from the rise of OTT services. The telecommunication operators now compete with these services. ICASA will continue to monitor technological changes and consumer behaviour related to OTT services.

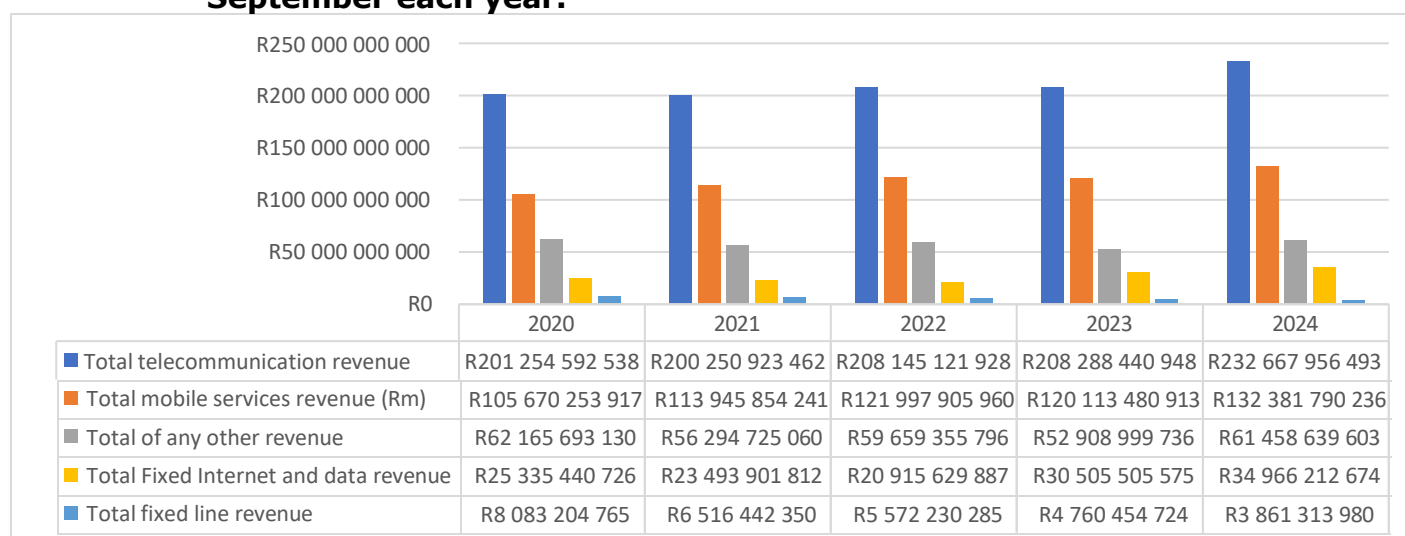
The Authority acknowledges the critical importance of ensuring universal access to ICTs and is engaged in proactive collaboration with a variety of international and regional organizations, including the Southern African Development Community (SADC), the Communications Regulators Association of Southern Africa (CRASA), the African Telecommunications Union (ATU), and ITU. These concerted efforts are, inter alia, designed to reach out to underserved and remote communities, effectively working to bridge the digital divide. Through these initiatives, the Authority is committed to creating an inclusive digital landscape where every individual, regardless of their geographical location, can benefit from access to technology and information. The overarching goal is to ensure that no one is left behind in this dynamic digital age.

## 4.1 Telecommunications Sector Revenues

In 2024, the total telecommunication revenue increased by 11.70%, largely influenced by a 10.21% increase in mobile services revenue and a 16.16% increase in any other revenue. Fixed internet and data revenue exhibited a strong growth of 14.62%, indicating a growing demand for broadband services. In contrast, fixed-line revenue declined by 18.89% reflecting a continued negative trajectory. The telecommunication industry's growth is largely attributed to digital transformation and the increasing reliance on mobile and broadband services. The decline in fixed-line revenue reflects shifting consumer preferences and technological advancements favouring mobile communications.

Over the five-year period from 2020 to 2024, the CAGR for total telecommunication revenue increased by 3.69%, with mobile services revenue leading, with an increase of 5.80%. Fixed Internet and data showed the highest increase of 8.39%, while any other revenue decreased slightly by 0.29%. Fixed-line services continued to decrease sharply by 16.86%.

**Graph 8: Telecommunications revenue, for the 12 months ending 30<sup>th</sup> September each year.**



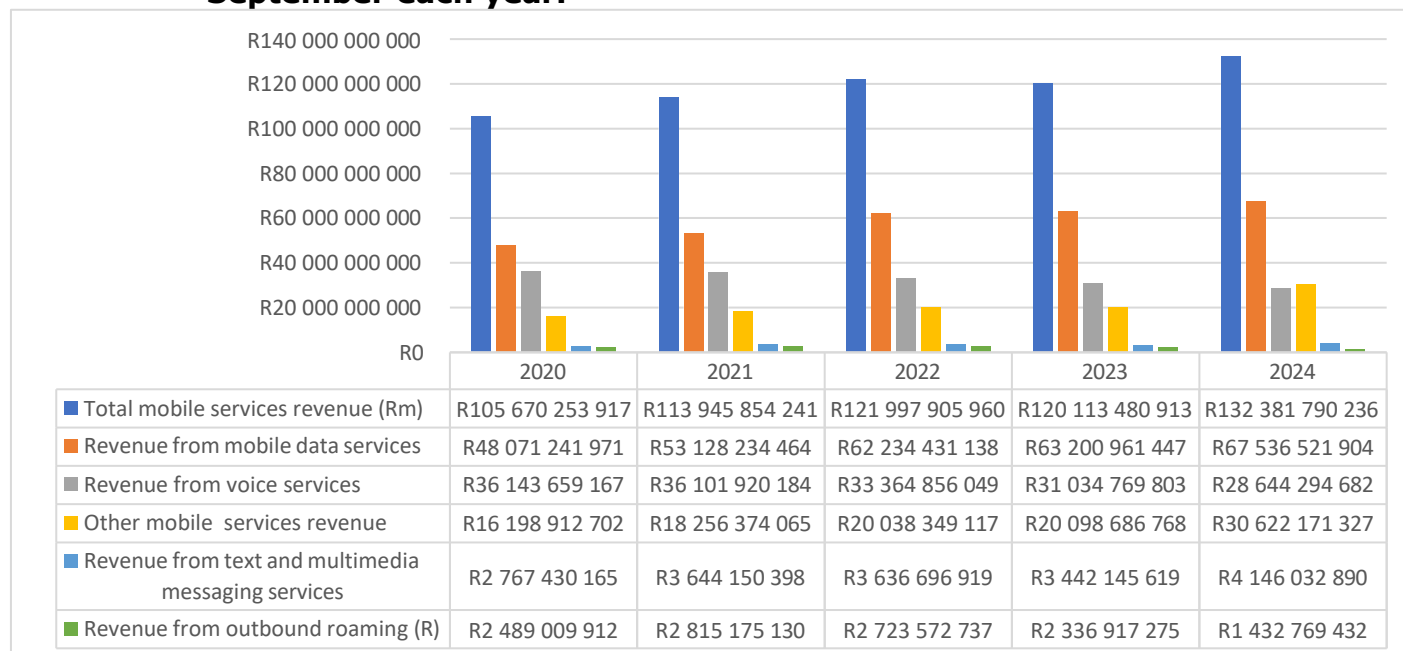
Source: ICASA Electronic Communications Questionnaire 2020 – 2024

### 4.1.1 Total Mobile Services Revenue (Rm)

In 2024, total mobile services revenue increased by 10.21%, with mobile data services increasing by 6.86%. Revenue from voice services decreased by 7.70%, continuing its downward trend. Other mobile services revenue increased significantly. Revenue from text and multimedia messaging services increased by 20.45%, while outbound roaming revenue decreased by 38.69%. The substantial growth in mobile data services reflected a higher demand for mobile internet, while the decline in voice services and roaming revenue indicated a shift in consumer preference toward data-based services.

Over five years (CAGR), total mobile services revenue increased by 5.80%. Mobile data services revenue increased by 8.87%, while voice services decreased by 5.65%. Text and multimedia messaging services experienced an increase of 10.63%, and outbound roaming decreased by 12.90%.

**Graph 9: Mobile services revenue for the 12 months, ending 30<sup>th</sup> September each year.**



Source: ICASA Electronic Communications Questionnaire 2020 - 2024

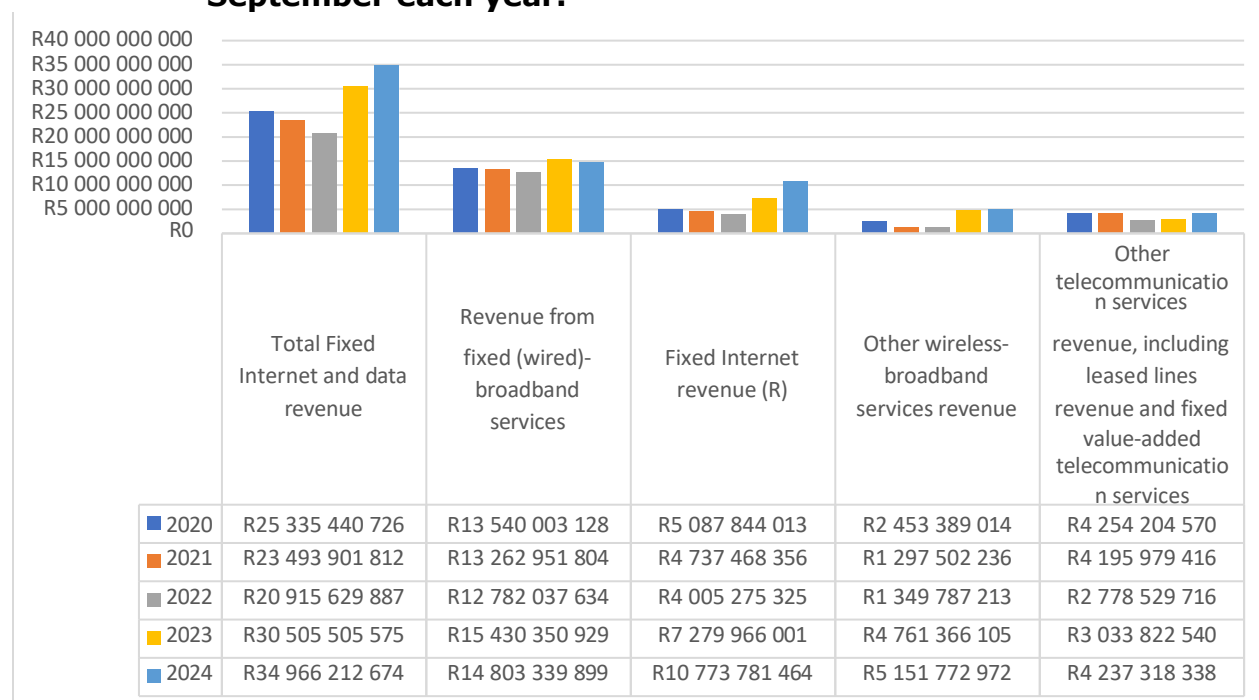
\* Other mobile services revenue refers to any mobile revenue excluding mobile data services, voice services, text and multimedia messaging services and outbound roaming. \*

### 4.1.2 Total Fixed Internet and Data Revenues

In 2024, total fixed internet and data revenue increased by 14.62%, driven by a significant increase in fixed internet revenue<sup>5</sup>. However, revenue from fixed (wired) broadband services decreased by 4.06%, while other wireless broadband services saw an increase of 8.20%.

Over five years, the CAGR for total fixed internet and data revenue grew by 8.39%, fixed (wired) broadband services revenue slightly increased by 2.26%, while other wireless-broadband services revenue increased by 20.38% for the same period.

**Graph 10 Fixed internet and data revenue, 12 months ending 30<sup>th</sup> September each year.**



Source: ICASA Electronic Communications Questionnaire, December 2020 – 2024.

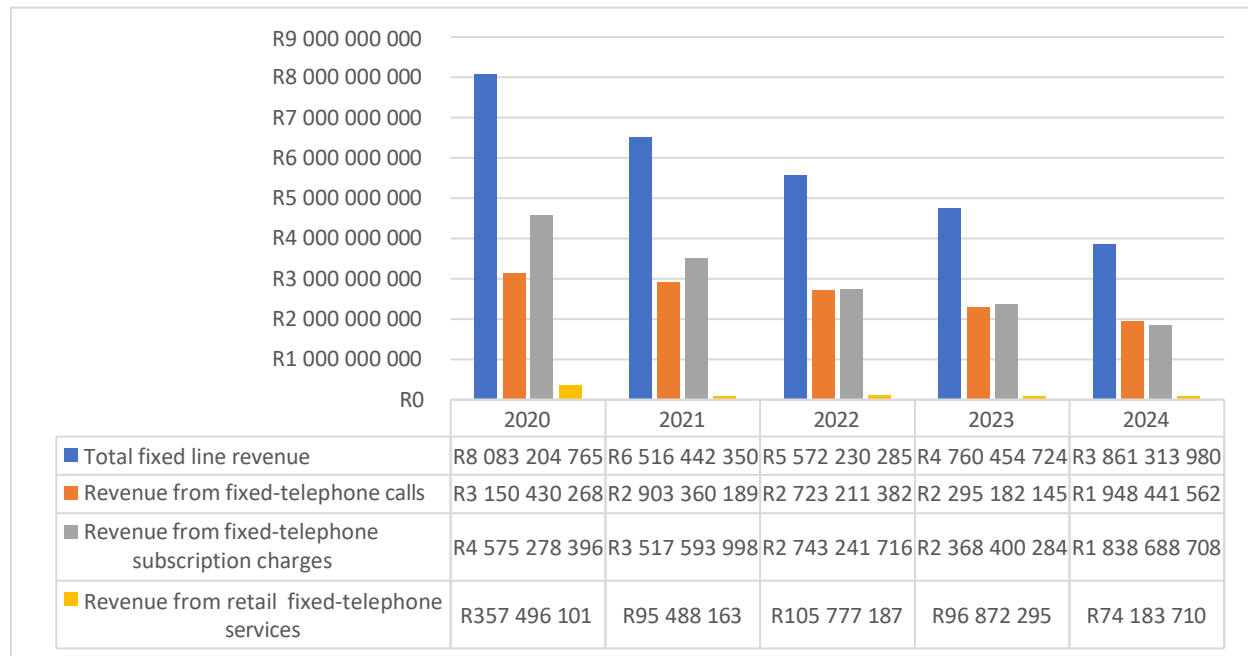
<sup>5</sup> One of the licensees did not submit data in 2023 but submitted it in 2024.

### 4.1.3 Total Fixed Line Revenue

In 2024, total fixed-line revenue declined by 18.89%. Revenue from fixed-telephone calls decreased by 15.11%, while subscription charges experienced a more significant drop of 22.37%. Retail fixed-telephone services also saw a noticeable decline.

Over the five-year period, total fixed-line revenue declined by 16.86%, with fixed-telephone calls decreasing by 11.32% and fixed-telephone subscription charges decreasing by 20.38%. Retail fixed-telephone services showed a decline, indicating shifts in consumer behaviour.

**Graph 11: Total Fixed line revenue, 12 months ending 30<sup>th</sup> September each year.**



Source: ICASA Electronic Communications Questionnaire, December 2020 - 2024.

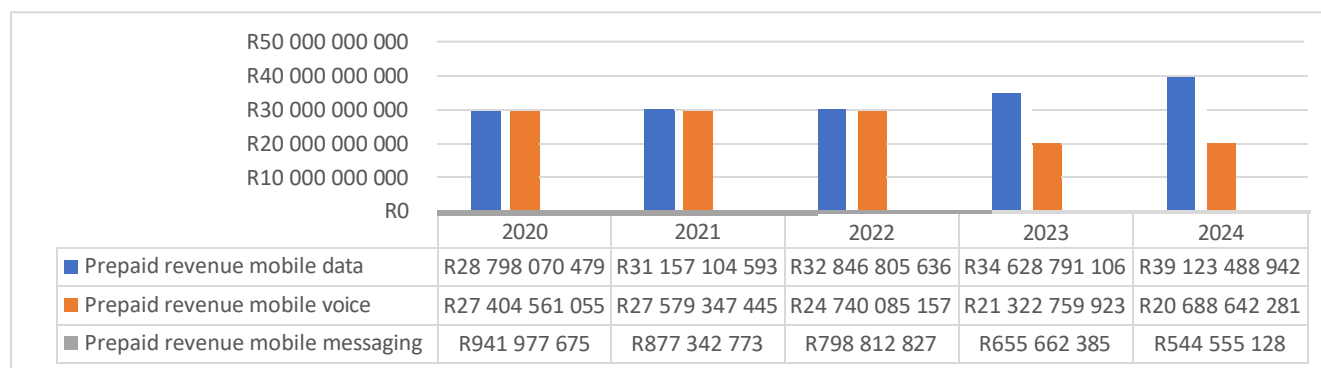
#### 4.1.4 Prepaid Mobile Voice, Data and Messaging Revenue

In 2024, the revenue generated from prepaid mobile data experienced a notable surge of 12.98%, highlighting a robust and escalating demand for mobile data services among consumers. This increase underscores the growing reliance on online activities such as streaming, social media engagement, and other data-intensive applications. Conversely, revenue from prepaid mobile voice services faced a decline of 2.97%, suggesting a shift in consumer behaviour as users increasingly turn to alternative means of communication such as internet-based calling and messaging platforms.

Moreover, the prepaid mobile messaging revenue suffered the steepest decrease, plummeting by 16.95%. This significant drop indicates a dwindling interest in traditional text messaging (SMS) and multimedia messaging services, as consumers gravitate towards more versatile and feature-rich messaging applications that offer enhanced functionalities, such as group chats and multimedia sharing. This trend reflects a broader transformation in communication preferences, as consumers adapt to the conveniences of modern technology.

Over the five-year period, prepaid mobile data revenue increased by 7.96%, while prepaid mobile voice revenue decreased by 6.79%. Prepaid mobile messaging revenue saw a decline of 12.80%.

**Graph 12: Prepaid mobile voice, data and messaging revenue for the 12 months ending on 30<sup>th</sup> September each year.**



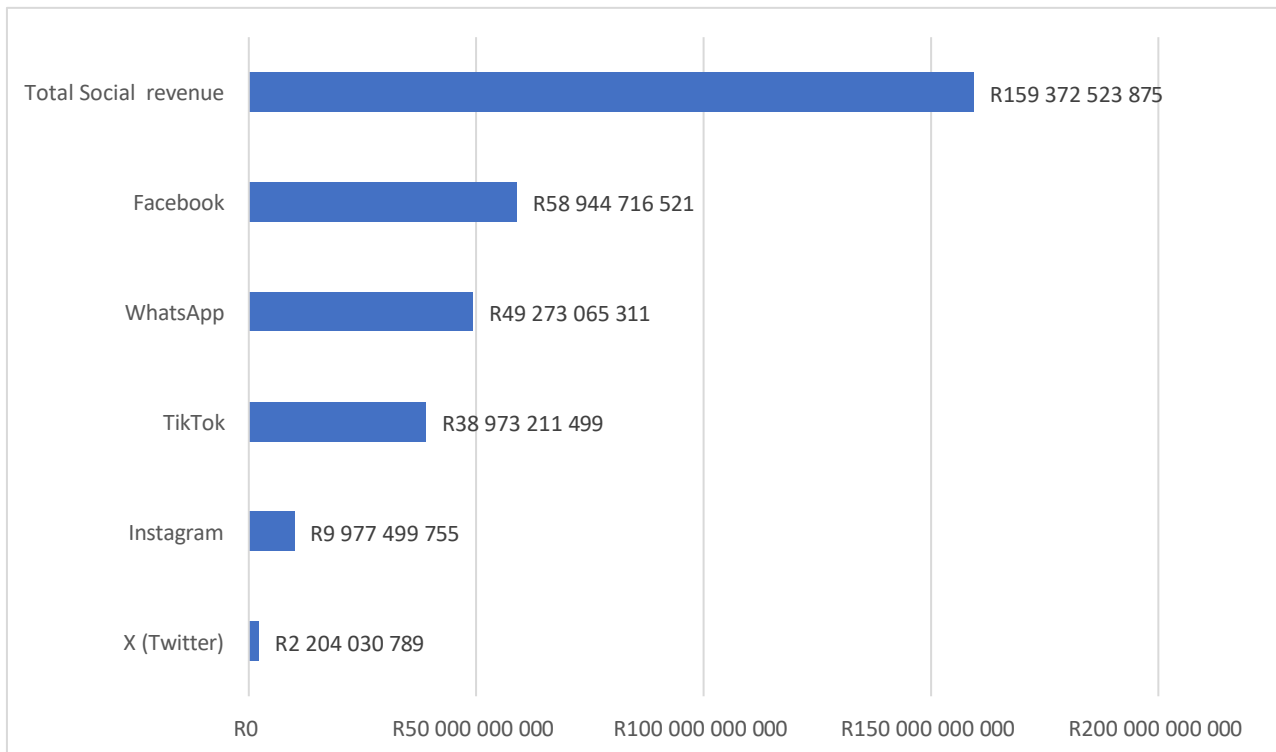
Source: ICASA Electronic Communications Questionnaire 2020 - 2024.



#### 4.1.5 Total revenue generated by operators on social media platforms

In 2024, total revenue generated on social media (revenue generated by operators from customers using services to access social media) platforms reached R159,3 billion, with Facebook users leading the market, generating R58,9 billion, followed by WhatsApp users with R49,2 billion. TikTok users emerged as a significant player, contributing R38,9 billion. Instagram user’s revenue stood at R9,9 billion, showcasing its moderate influence. X (Twitter) users contributed R2,2 billion, holding a smaller share of the market.

**Graph 13: Revenue generated by operators on social media platforms**

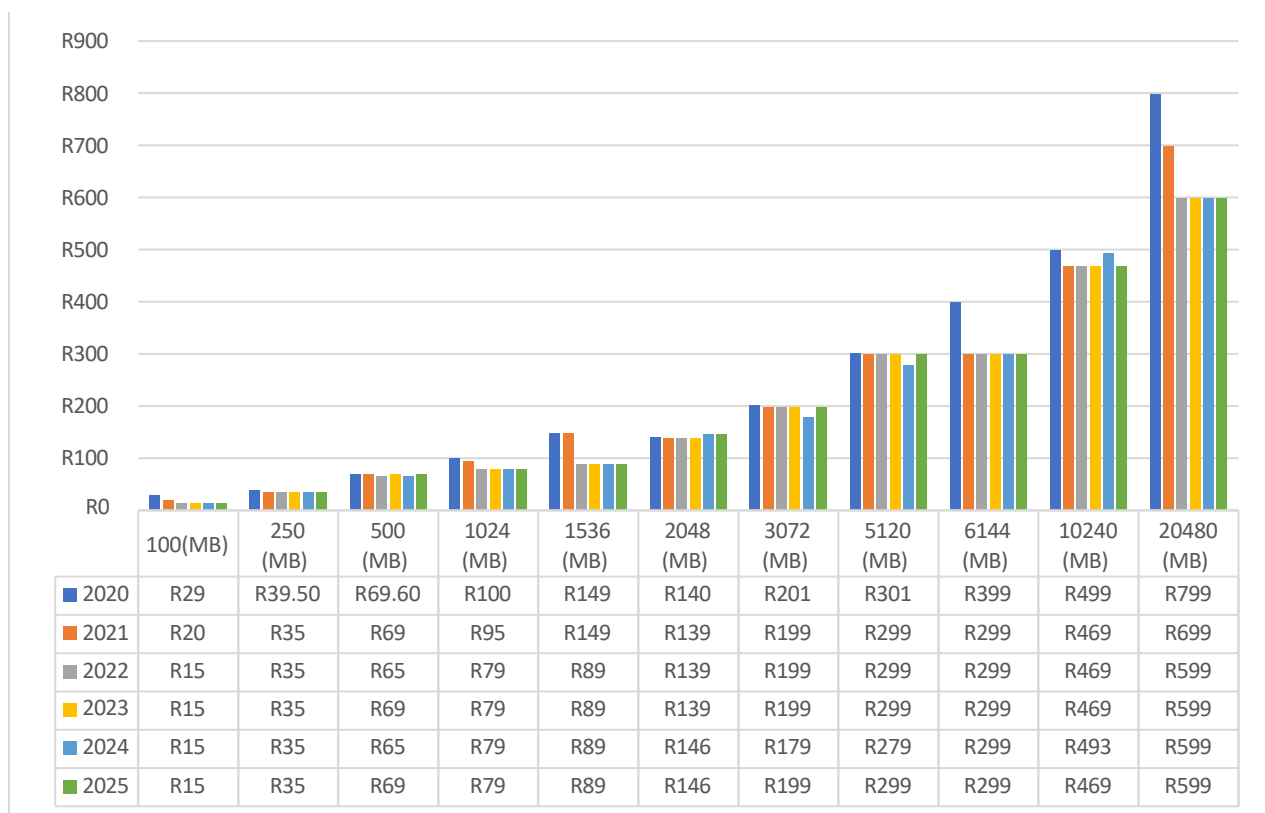


Source: ICASA Electronic Communications Questionnaire 2024.

### 4.1.5 Prepaid data prices (month validity)

The graph presents a detailed overview of trends in the lowest prepaid data bundle prices from 2020 to 2025. Overall, prices for data bundles reflected a decrease in 2021 and 2022. From 2022, the trend revealed some nuanced patterns characterized by minor fluctuations; while certain packages experienced slight price increases, others saw reductions. This variability in pricing can be attributed to market dynamics and the competitive strategies employed by service providers.

**Graph14: Lowest prepaid data price (month validity)**

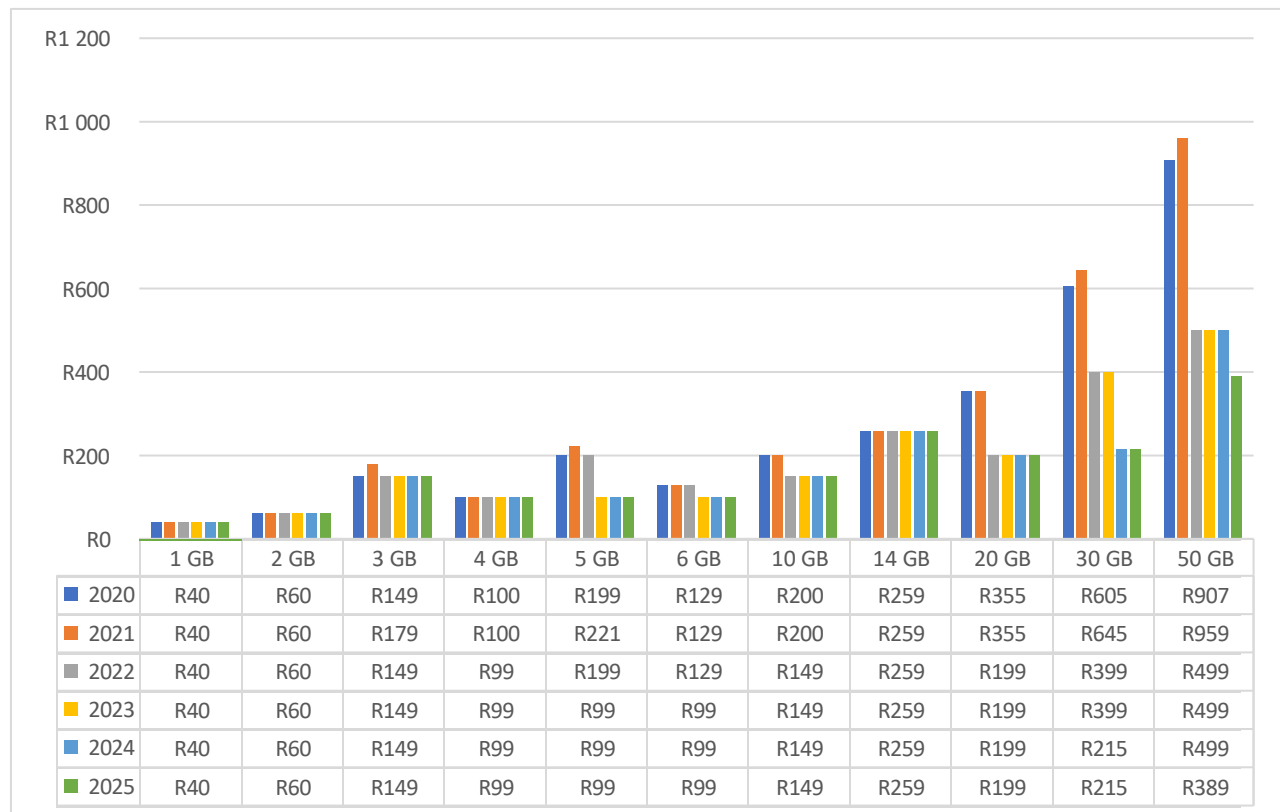


Source: ICASA Electronic Communications Questionnaire for 2020 - 2025.

#### 4.1.6 Post-paid data prices (month validity)

The graph shows the price trends of post-paid data bundles from 2020 to 2025, indicating that the prices remained stable. Postpaid data remained cheaper than prepaid data, however post-paid data prices remained consistent for plans ranging from 1GB to 3GB, but there is a decrease in prices for plans from 4GB to 50GB.

**Graph15: Lowest post-paid data price (month validity)**



Source: ICASA Electronic Communications Questionnaire for 2020 - 2025.

#### 4.1.7 Prepaid and Post-paid Voice and Messaging prices

When it comes to prepaid voice services, the pricing structure is designed to accommodate various user needs, ranging from a reasonable R0.66 to a maximum of R2.50 per minute. For those opting for post-paid plans, the cost is even more attractive, with rates falling between R0.35 and R2.15 per minute. Notably, all voice rates are flat rates, ensuring simplicity and predictability for users.

For local SMS messaging, prepaid users can expect prices that fluctuate between R0.15 and R0.52, offering flexibility for casual texters and those who communicate frequently. In contrast, post-paid users will find their local SMS rates slightly higher, ranging from R0.30 to R0.55.

When it comes to international SMS, prepaid rates provide a competitive range, spanning from R1.61 to R2 per message, catering to those who need to connect beyond borders. Post-paid customers, meanwhile, enjoy a more concise range of international SMS charges, from R1.52 to R1.74, allowing for seamless global communication without the stress of unpredictable costs.

**Table 1: Prepaid and post-paid voice and SMS prices**

Price range	Voice (Per minute)	SMS (Local)	SMS (International)
Prepaid	R0.66 to R2.50	R0.15 to R0.52	R1.61 to R2.00
Post-paid	R 0.35 to R 2.15	R 0.30 to R 0.55	R 1.52 to R1.74

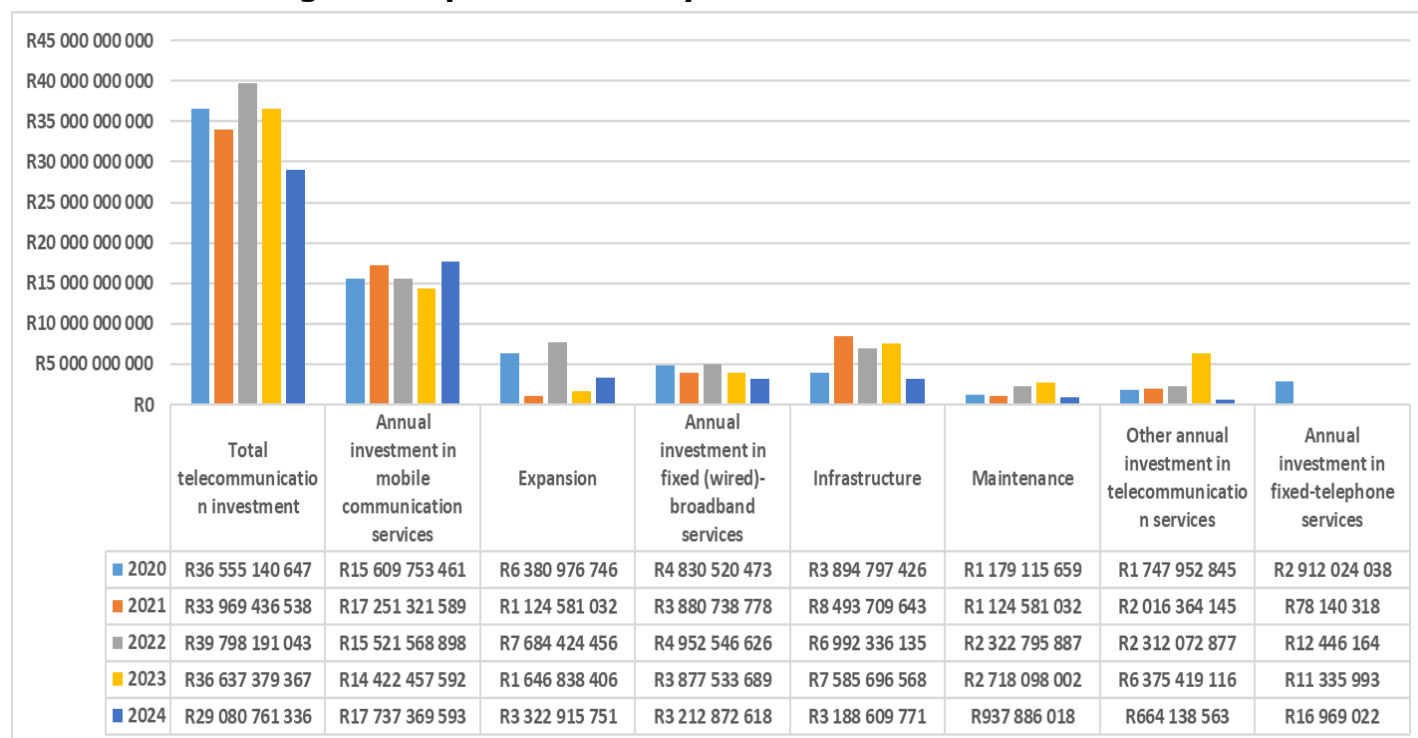
Source: ICASA Electronic Communications Questionnaire as of 2025.

## 4.2.1 Total Telecommunications Investment

In 2024, the overall telecommunications investment experienced a notable decline of 20.63%. Conversely, the annual investment specifically allocated to mobile communication services saw a substantial increase of 22.98%. This contrasting trend highlights the growing consumer demand for mobile services, prompting operators to adapt and respond accordingly to meet the evolving needs of their users.

Over the past five years, the total investment in telecommunications has decreased by 5.56%. However, during the same period, investments in mobile services have risen by 3.25%, indicating a clear shift in focus within the industry. This suggests that while traditional telecommunications may be facing challenges, mobile services are emerging as a pivotal area of growth, reflecting the increasing reliance on mobile connectivity in our daily lives.

**Graph 16: Telecommunication investment breakdown, for the 12 months ending 30<sup>th</sup> September each year.**



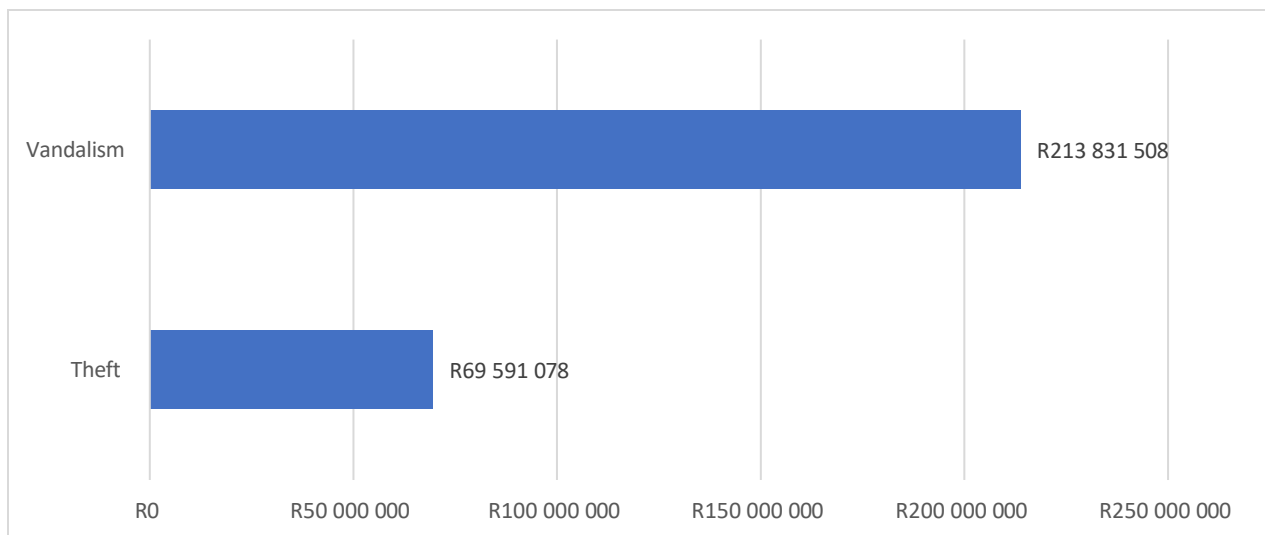
Source: ICASA Electronic Communications Questionnaire 2020 - 2024.

### 4.2.2 Infrastructure Expenditure: Theft and Vandalism

In 2024, the telecommunications sector in South Africa faced significant challenges due to theft and vandalism, with losses amounting to R69.5 million and R213.8 million, respectively. These criminal activities severely impacted the service providers' ability to deliver reliable connectivity and maintain infrastructure.

Furthermore, the ongoing threat of infrastructure damage not only disrupted services but also hindered investments and development efforts within the industry, creating a pervasive atmosphere of insecurity that affected both consumers and businesses reliant on stable telecommunications networks.

**Graph 17: Theft and Vandalism in 2024.**

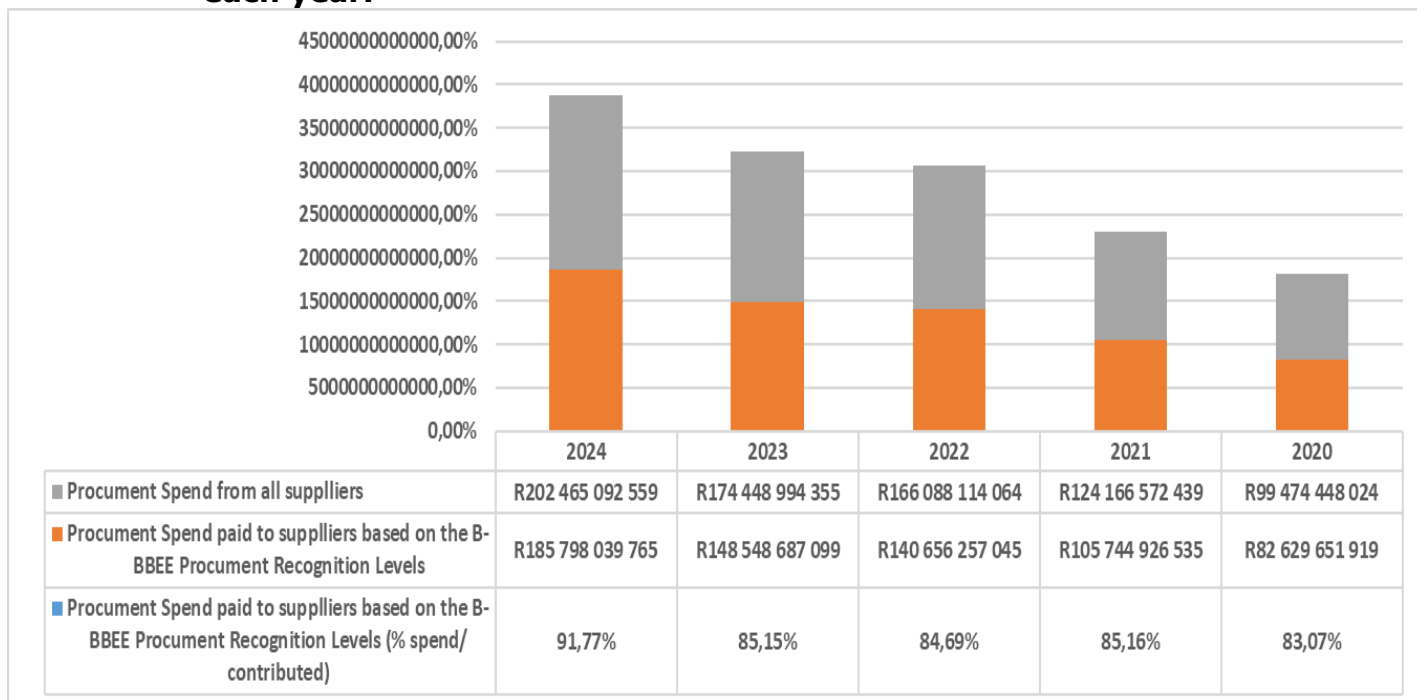


Source: ICASA Electronic Communications Questionnaire 2024

### 4.3 Telecommunications Procurement Spend to All Suppliers Based on B-BBEE Ranking

Based on the B-BBEE ranking levels, 91.77% of telecommunications procurement spending, amounting to approximately R185 billion, was allocated to suppliers out of a total spend of R202 billion in 2024. The table below provides an overview of procurement from 2020 to 2024, highlighting compliance with B-BBEE targets during this period.

**Graph 18: Telecommunication procurement spend to all suppliers based on the B-BBEE, for the 12-month period ending 30<sup>th</sup> September each year.**

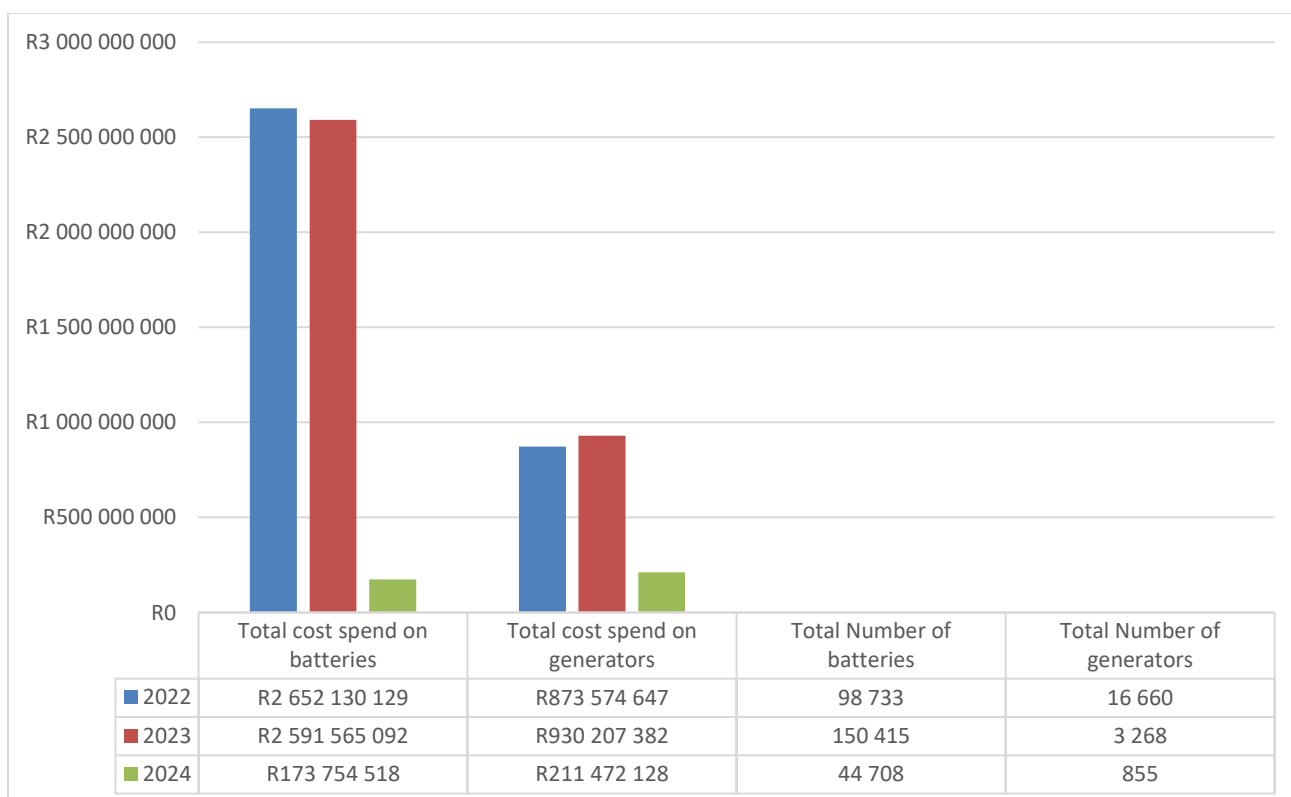


Source: ICASA Electronic Communications Questionnaire 2020 - 2024.

#### 4.4 Batteries and generators used when there is no electricity (Loadshedding), and cost spend during this period by telecommunication licensees

Between 2023 and 2024, there was a significant decrease in spending on both batteries and generators. Battery expenditure dropped from R2.5 billion to R173.7 million, and generator spending declined from R930.2 million to R211.4 million. Similarly, the number of batteries purchased fell from 150,415 to 44,708, and generators from 3,268 to 855. This reduction aligns with the South African government's successful initiatives to address load-shedding.

**Graph 19: Number of battery and generator used when there is no electricity (Loadshedding) and cost spend during this period by service providers, for the 12-month period ending 30<sup>th</sup> September 2024.**



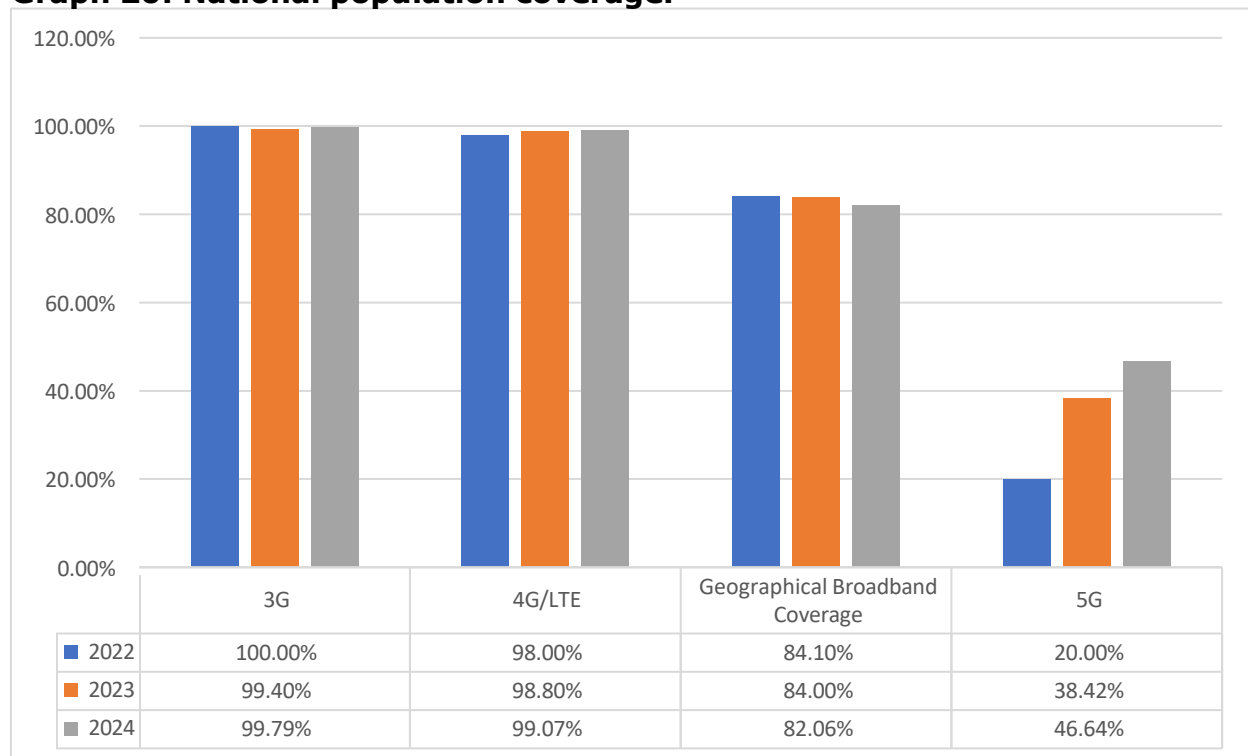
Source: ICASA Electronic Communications Questionnaire 2022 - 2024.



## 4.5 National Population Coverage

The graph shows a slight decline in 3G coverage from 100% in 2022 to 99.79% in 2024, likely due to a focus on more advanced technologies. 4G/LTE maintains a strong coverage, growing marginally from 98% to 99.07%. Geographical broadband coverage shows a slight decline from 84.10% in 2022 to 82.06% in 2024. More work is still needed to ensure that no one is left behind. The most notable growth is in 5G coverage, which more than doubles from 20% in 2022 to 46.64% in 2024, indicating a significant investment in next-generation connectivity infrastructure.

**Graph 20: National population coverage.**



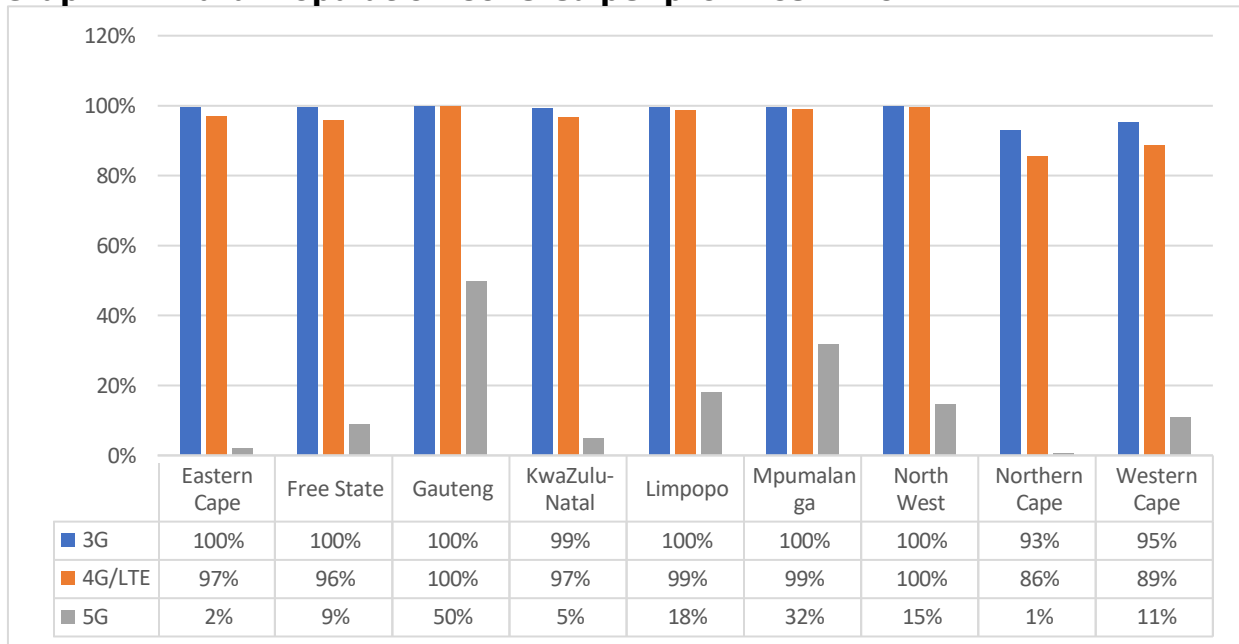
Source: ICASA Electronic Communications Questionnaire 2024.

### 4.5.1 Rural Population Coverage

In 2024, with respect to 3G and 4G/LTE, all provinces coverage above 86% as reported by the licensees.

Northern Cape province reported the lowest percentage of 1% for 5G coverage in rural areas in 2024.

**Graph 21: Rural Population Covered per province in 2024.**



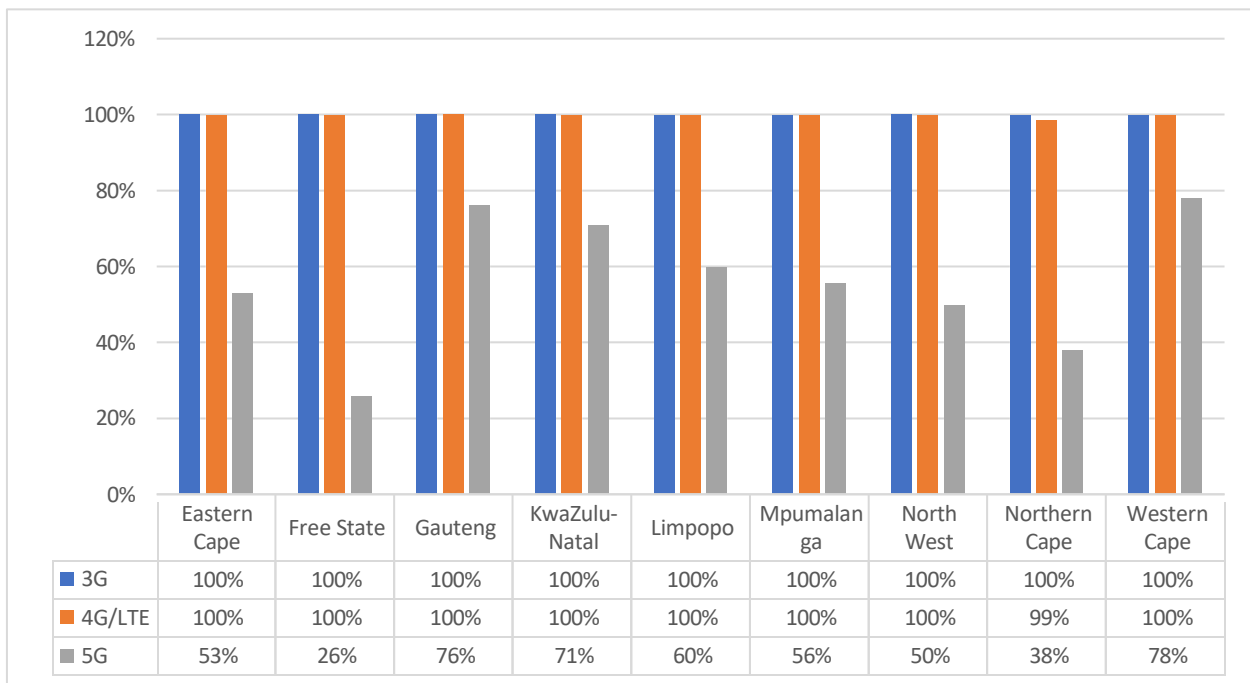
Source: ICASA Electronic Communications Questionnaire 2024.

### 4.5.2 Urban Population Coverage

In 2024, with respect to 3G and 4G/LTE coverage, all provinces were at (99% to 100%).

Western Cape was the highest province with 78% 5G coverage, and the Free State province reported the lowest 5G coverage in urban areas at 26% in 2024.

**Graph 22: Urban Population Covered per province in 2024.**



Source: ICASA Electronic Communications Questionnaire 2024.

## 4.6 Mobile Cellular and Smartphone Subscriptions

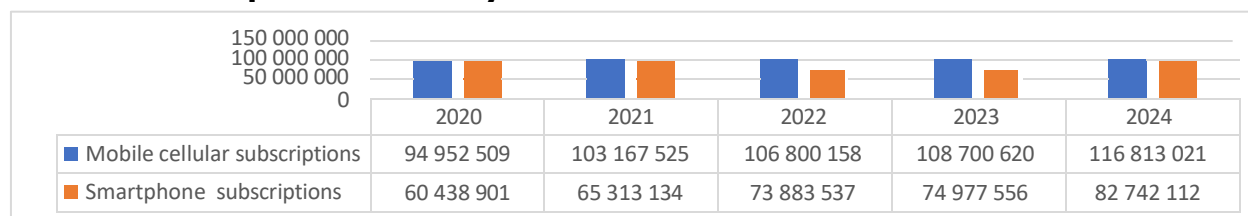
In 2024, South African service providers are offering a variety of smartphones<sup>6</sup> at competitive prices for both prepaid and postpaid plans. Entry-level models start at R499, an appealing price, making smartphones more accessible, while premium devices can go up to R45,999.

Despite these pricing options, affordability remains a concern, particularly for those from lower-income backgrounds. There is a need for ongoing discussions and innovative solutions to ensure broader access to smartphones for all.

In 2024, mobile cellular subscriptions increased by 7.46% to reach 116.8 million, while smartphone subscriptions rose by 10.36% to reach 82.7 million. The growth in smartphone usage reflects the increasing demand for mobile internet services and advanced digital applications, highlighting a shift toward enhanced connectivity and technology-driven communication.

In the last five years, the landscape of mobile technology has witnessed significant growth, with mobile cellular subscriptions increasing by 5.32%. Similarly, the adoption of smartphones has surged even further, with smartphone subscriptions rising by an impressive 8.17%.

**Graph 23: Mobile Cellular and Smartphone Subscriptions, as of 30<sup>th</sup> September each year.**



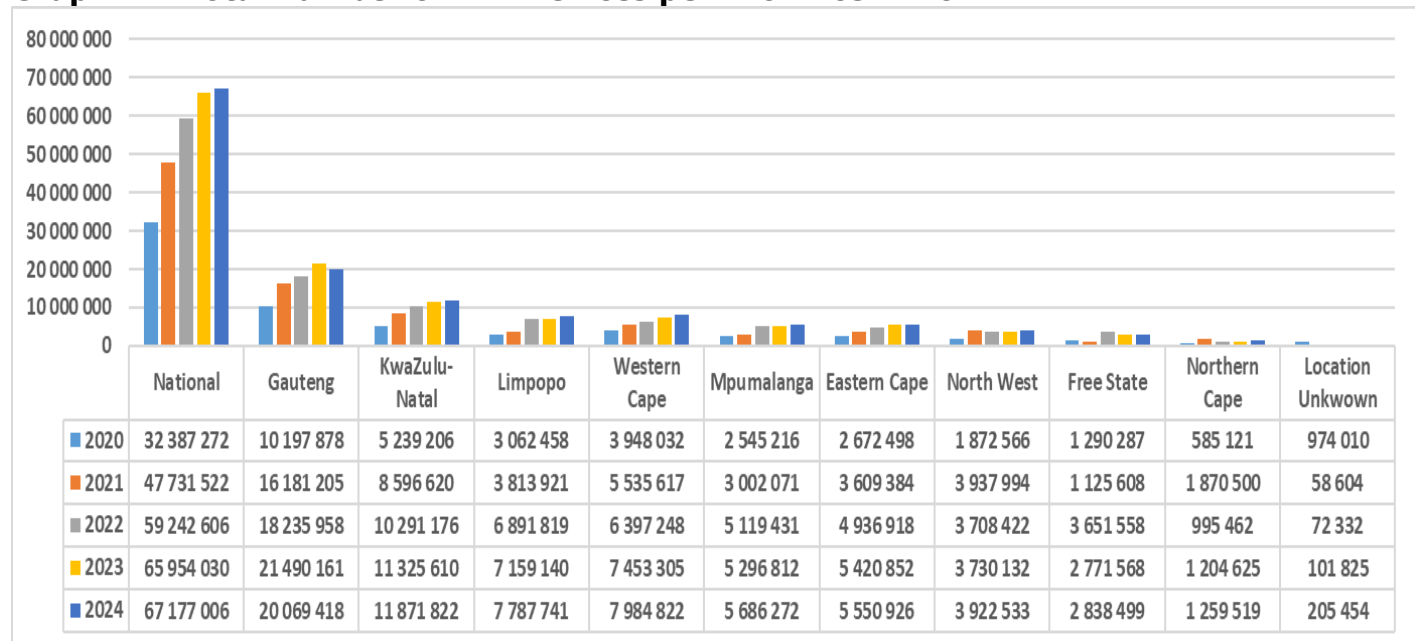
Source: ICASA Electronic Communications Questionnaire. 2020 – 2024

<sup>6</sup> A smartphone is a mobile phone with advanced features: it has Wi-Fi connectivity, web browsing capabilities, a high-resolution touchscreen display and the ability to use apps. The majority use one of the following mobile operating systems: Android, Symbian, iOS, BlackBerry OS and Windows Mobile.

#### 4.6.1 Total Number of LTE Devices

In 2024, the national LTE device figures continued to rise from 65 million to 67 million, representing a moderate 1.9% growth. This indicates a steady increase in the adoption of LTE technology across the country. Gauteng indicated a decline of 6.6% with a decrease from 21 million to 20 million. Conversely, KwaZulu-Natal grew by 4.8%, increasing from 11,3 million to 11,8 million. Limpopo and Western Cape maintained steady growth at 8.8% and 7.1%, respectively. Mpumalanga increased by 7.3%, while the Eastern Cape experienced a 2.4% rise. Free State showed a modest 2.4% gain, while North West and Northern Cape grew by 5.2% and 4.6%, respectively. Location unknown devices doubled, rising from 101,825 to 205,454.

**Graph 24: Total number of LTE Devices per Province in 2024.**



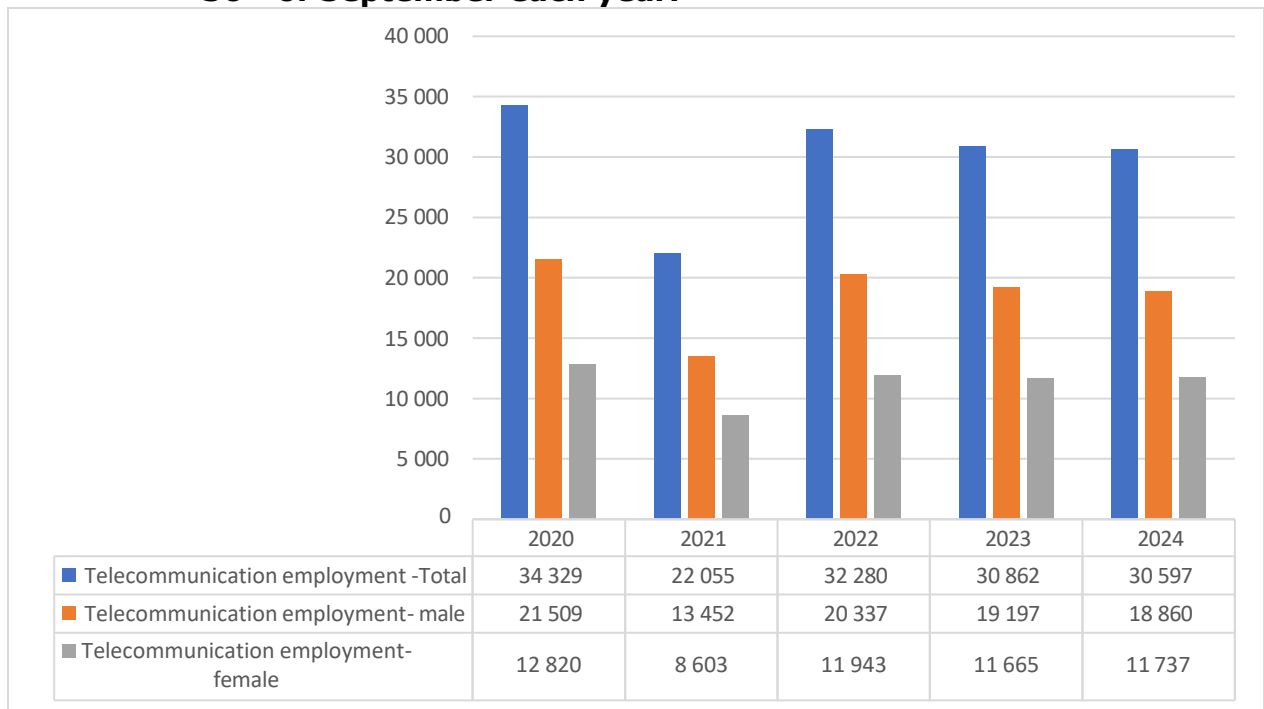
Source: ICASA Electronic Communications Questionnaire 2020 – 2024.

## 4.7 Persons Employed in the Telecommunications Sector

The total telecommunication employment slightly decreased by 0.86% in 2024. Male employment saw a 1.76% decline, while female employment increased by 0.62%, rising from 11,665 in 2023 to 11,737 in 2024.

Over the five-year period from 2020 to 2024, total telecommunication employment declined by 2.84%. Male employment decreased by 3.23%, while female employment showed a relatively smaller decline of 2.18%.

**Graph 25: Persons employed in the telecommunications sector, as of the 30<sup>th</sup> of September each year.**

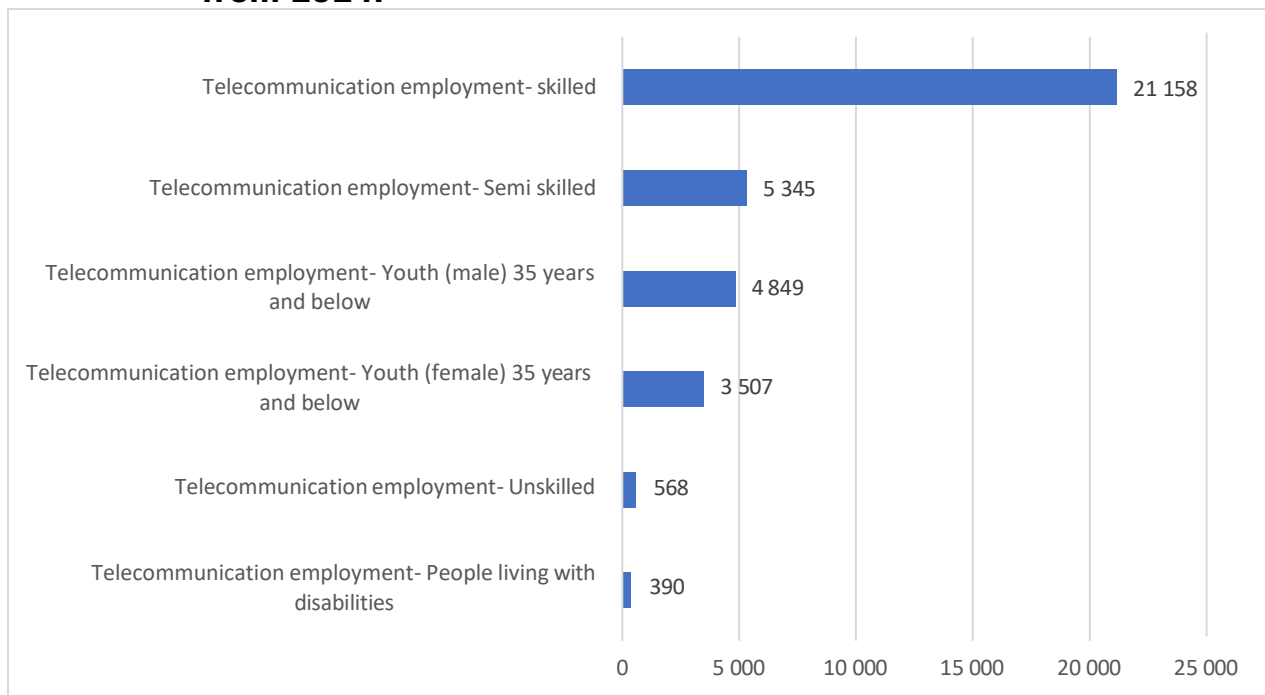


Source: ICASA Electronic Communications Questionnaire 2020 - 2024.

## 4.8 Persons Employed in the Telecommunications Sector Breakdown

In 2024, the telecommunications sector showed diverse employment distributions. Skilled workers represented the majority at 21,158, followed by 5,345 semi-skilled employees. Employment among the youth (35 years and below) was significant, with 4,849 males and 3,507 females employed. Unskilled employment accounted for 568 individuals. Importantly, the sector made efforts to be inclusive by employing 390 people living with disabilities, reflecting a move toward promoting diversity and equal opportunities in the workforce. These figures highlight a balanced mix of experience levels and a commitment to supporting underrepresented groups.

**Graph 26: Persons employed in the telecommunications sector breakdown from 2024.**



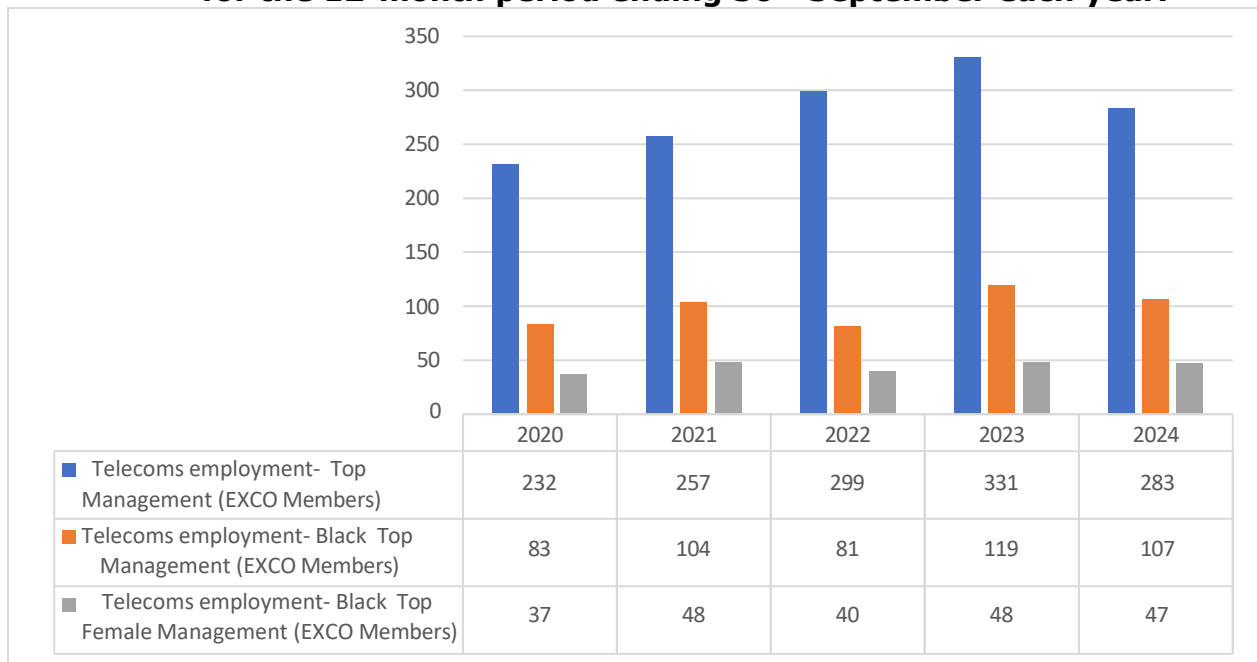
Source: ICASA Electronic Communications Questionnaire 2024.

## 4.9 Black Economic Empowerment Employment Measures

In 2024, total top management employment decreased by 14.50%. Black top management also declined by 10.08%, while Black top female management saw a minimal decline of 2.08%.

Over the five-year period, top management employment increased by 5.09%. Black top management rose by 6.56%, while Black top female management increased by 6.16%.

**Graph 27: Telecommunication Black Economic Empowerment Measures, for the 12-month period ending 30<sup>th</sup> September each year.**



Source: ICASA Electronic Communications Questionnaire 2020 - 2024.



## **4.10 Telecommunications Subscriptions**

### **4.10.1 Mobile Cellular (Prepaid and Post-paid mobile Cellular Phone Voice Subscriptions)**

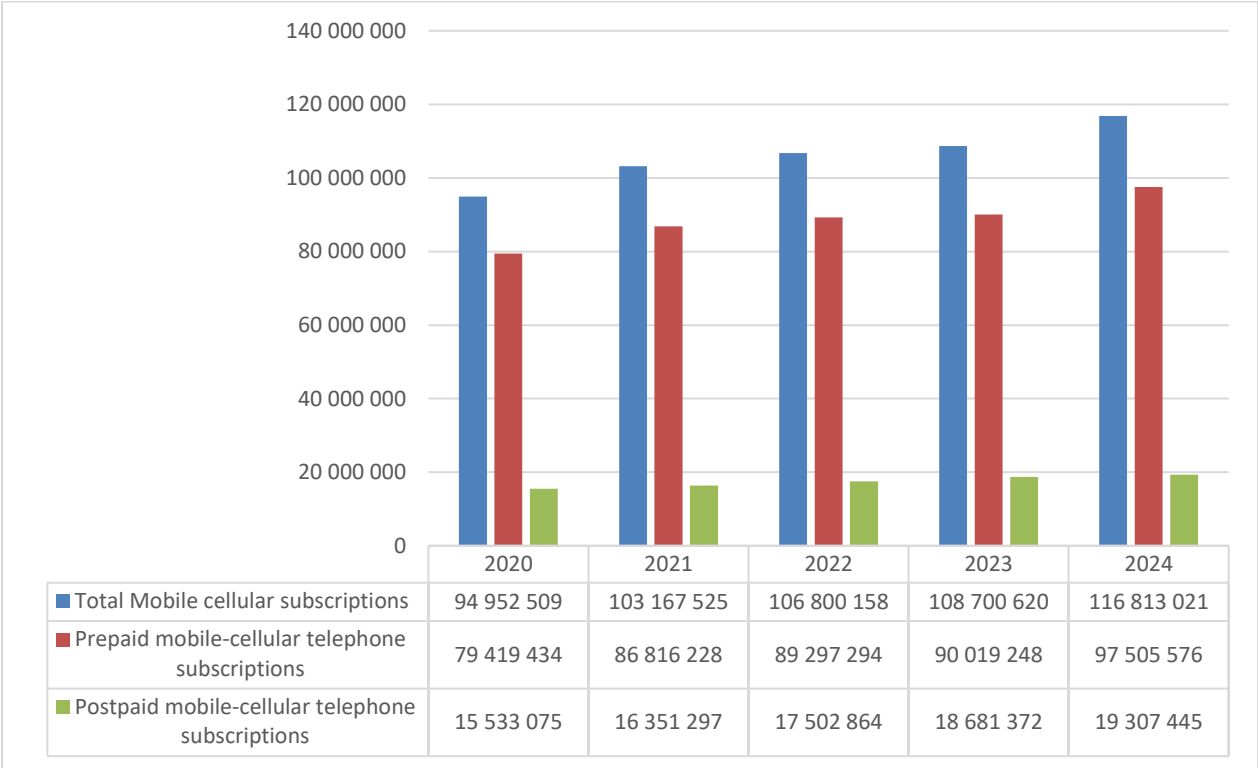
In 2024, the landscape of mobile cellular subscriptions experienced significant growth, with the total number of subscriptions increased by 7.46%, from 108 million to a robust 116 million. This increase reflects the ongoing digital transformation and the rising demand for mobile connectivity in the country.

A closer examination of the subscription types reveals that prepaid subscriptions increased by 8.32%, escalating from 90 million to 97 million. This growth can be attributed to the accessibility and flexibility that prepaid plans offer, making them increasingly popular among consumers who prefer not to commit to long-term contracts.

Conversely, postpaid subscriptions exhibited a more modest yet steady growth of 3.35%, rising from 18 million to 19 million. This rise, while smaller in percentage, indicates a continued interest in comprehensive mobile services that often come with added benefits, appealing to users who value consistent service and additional features.

Looking at the broader trend over the five-year period from 2020 to 2024, the total number of mobile cellular subscriptions has increased impressively by 5.32%. Notably, prepaid subscriptions have seen a rise of 5.26%, suggesting a strong consumer shift towards more economical and flexible options. Postpaid subscriptions, on the other hand, have experienced an even more significant growth rate of 5.59%. This pronounced growth highlights a shifting consumer preference towards diverse mobile plans that provide greater flexibility and tailored services to meet individual needs. Overall, these trends illustrate the dynamic nature of the mobile subscription market and its evolving landscape.

**Graph 28: Prepaid and post-paid mobile cellular voice subscriptions, as of 30<sup>th</sup> September each year.**



Source: ICASA Electronic Communications Questionnaire 2020 - 2024

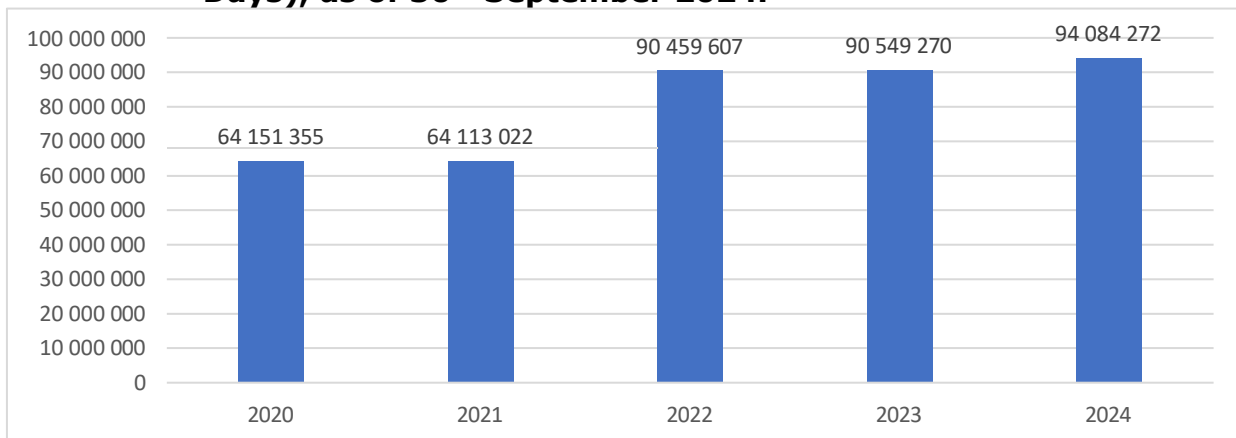
Note: The definition of prepaid subscribers is adopted from the ITU definition of 3-month active subscribers. Some South African operators do not have this metric available but rather count SIMs that have not been disconnected within a 90-day window implying that the number may be overstated according to the strict definition. Top-up bundles and machine-to-machine subscriptions were included in post-paid mobile cellular subscriptions.

#### 4.10.2 Mobile Cellular Active Subscriptions (Active for more than 90 Days)

In 2024, South Africa's mobile cellular active subscriptions reached 94 million, marking a 3.90% increase. This growth followed a significant rise from 64.1 million subscriptions in 2020. After a slight decline to 64.1 million in 2021, the market saw a sharp uptick to 90.4 million in 2022 and a marginal increase to 90.5 million in 2023.

The CAGR for mobile cellular active subscriptions between 2020 and 2024 was at 10.05%, signifying robust growth driven by enhanced network infrastructure and greater smartphone penetration in the country.

**Graph 29: Mobile Cellular Active Subscriptions (Active for more than 90 Days), as of 30<sup>th</sup> September 2024.**



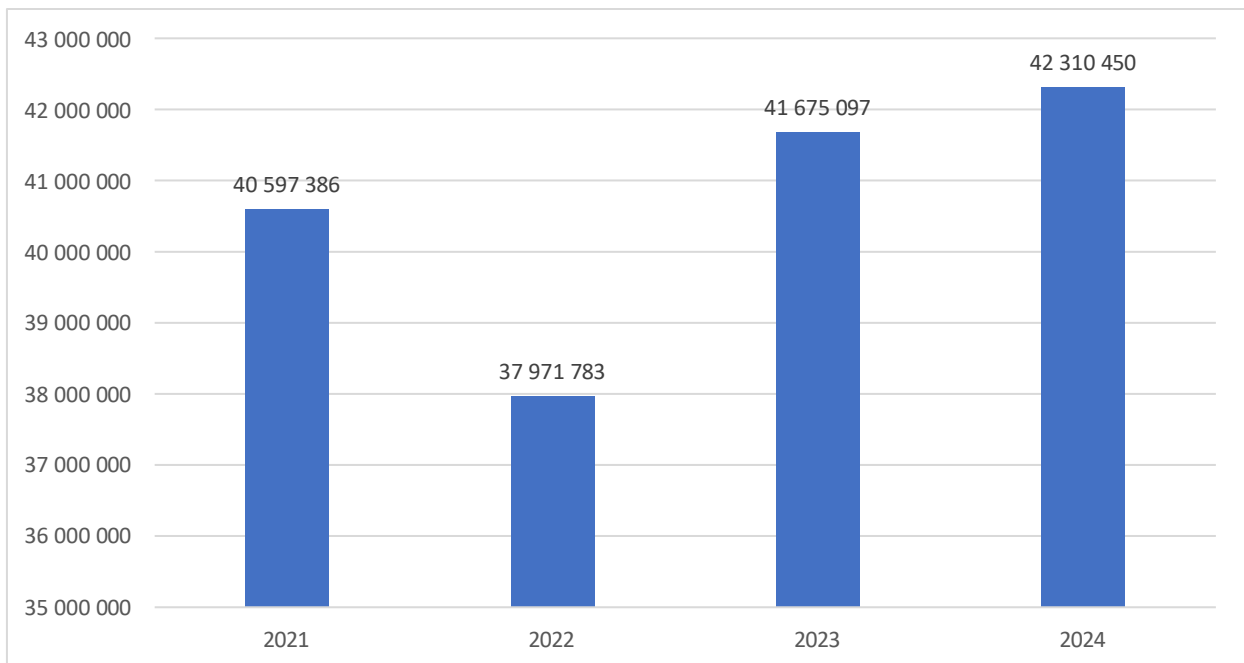
Source: ICASA Electronic Communications Questionnaire 2020 – 2024.

Note: The definition of prepaid subscribers is adopted from the ITU definition of 3-month active subscribers. Some South African operators do not have this metric available but rather count SIMs that have not been disconnected within a 90-day window implying that the number may be overstated according to the strict definition. Top up bundles and machine-to-machine subscriptions were included in post-paid mobile cellular subscriptions.

### 4.10.3 Mobile Cellular Phone Data Subscriptions

The number of mobile cellular data users saw a modest rise of 1.52%, growing from 41.6 million in 2023 to 42.3 million in 2024. This increase reflects a continuing trend of expanding connectivity and the growing reliance on mobile data services for communication, entertainment, and professional needs. The upward shift in user numbers indicates a broader acceptance of mobile technology and its integral role in everyday life, as more individuals and households adopt data plans to stay connected in an increasingly digital world.

**Graph 30: Mobile cellular phone data subscriptions, as of 30<sup>th</sup> September each year.**



Source: ICASA Electronic Communications Questionnaire 2021 – 2024.

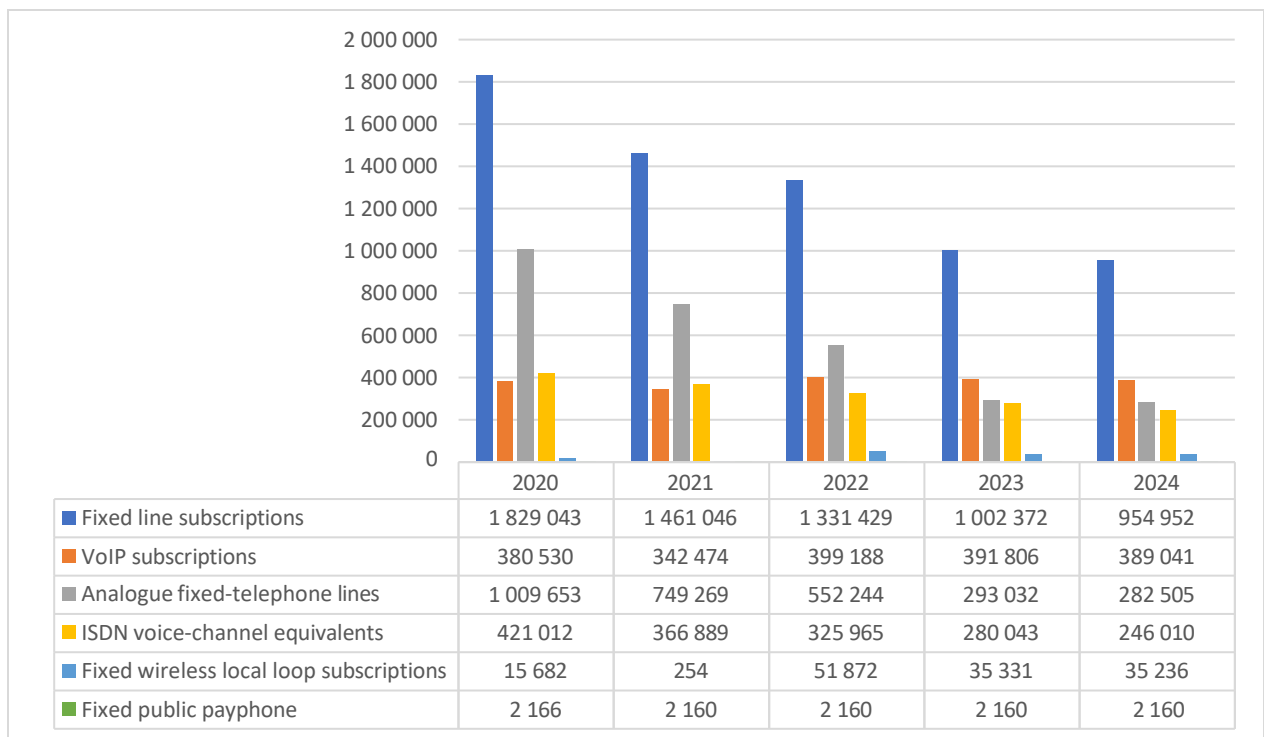
*Note: All LTE connections are included in 'mobile'. There is room for the definition of 'mobile broadband subscriptions' to be improved in subsequent reports, noting that it was not possible to accurately distinguish between handset data usage and mobile data usage on other devices, or alternatively to distinguish SIMs used for both voice and data from SIMs dedicated to data usage. It was also necessary to count total internet subscriptions rather than 'broadband' subscriptions, as it was not possible to accurately break out 'narrowband' internet, albeit this is now a small minority of total internet subscriptions. 'Wireless broadband' number may be incomplete in respect of some players, especially those operating in unlicensed spectrum bands.*

#### 4.10.4 Fixed Line Voice Subscriptions

In 2024, fixed-line subscriptions decreased by 4.73%, Voice over Internet Protocol (“VoIP”) subscriptions saw a slight decrease of 0.71%, fixed wireless local loop subscriptions exhibited a marginal decrease of 0.27%.

Over five years, fixed-line subscriptions recorded a negative CAGR of 15%, reflecting a sharp decline. VoIP subscriptions maintained a marginal growth of 0.55%, indicating near stagnation. In contrast, fixed wireless local loop subscriptions saw an increase of 22.43%, highlighting the significant growth amid the overall decline of traditional telecommunication services.

**Graph 31: Fixed line subscriptions, as of 30<sup>th</sup> September each year.**

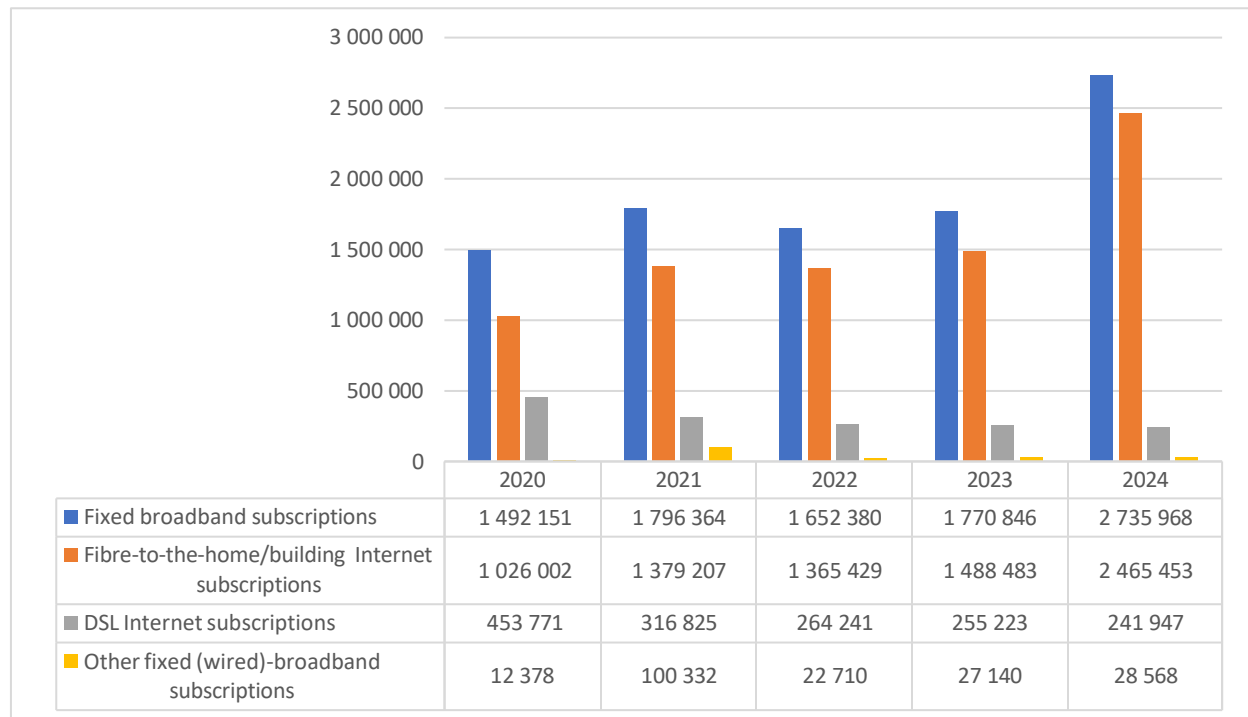


Source: ICASA Electronic Communications Questionnaire, December 2020 - 2024.

#### 4.10.5 Fixed Line Broadband Subscriptions

The fixed broadband subscriptions grew significantly, rising from 1,7 million in 2023 to 2,7 million in 2024<sup>7</sup>, driven primarily by the rapid expansion of fibre-to-the-home/building Internet subscriptions, which surged from 1,4 million in 2023 to 2,4 million in 2024. Digital Subscriber Line (“DSL”) Internet subscriptions slightly declined from 255,223 to 241,947, indicating a reduced demand for legacy broadband technologies. Other fixed (wired)-broadband subscriptions exhibited growth, increasing from 27,140 to 28,568 over the same period.

**Graph 32: Fixed broadband subscriptions, as of 30<sup>th</sup> September each year.**



Source: ICASA Electronic Communications Questionnaire 2020 - 2024.

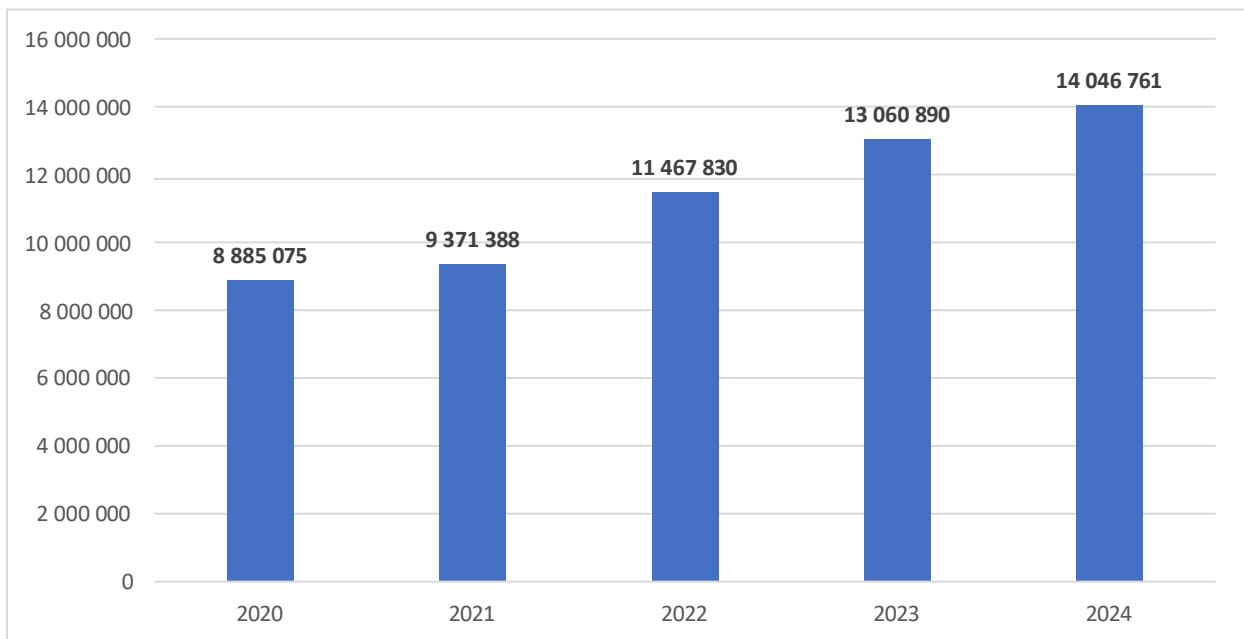
<sup>7</sup> One of the licensees did not submit data in 2023 but submitted it in 2024

#### 4.10.6 Machine-to-Machine ("M2M")<sup>8</sup> Mobile Subscriptions

The M2M mobile-network subscriptions increased significantly, rising from 13.0 million in 2023 to 14,0 million in 2024, representing a growth rate of 7.55% in 2024. This indicates a consistent upward movement in the adoption of M2M technology.

Over five years, M2M mobile-network subscriptions experienced a robust CAGR of 12.13%, reflecting strong and consistent growth in the sector. The rise in subscriptions indicates a rapid increase in demand for M2M connectivity, driven by the growing integration of Internet of Things ("IoT") across various industries.

**Graph 33: M2M mobile-network subscriptions, as of 30<sup>th</sup> September each year.**



Source: ICASA Electronic Communications Questionnaire 2020 - 2024.

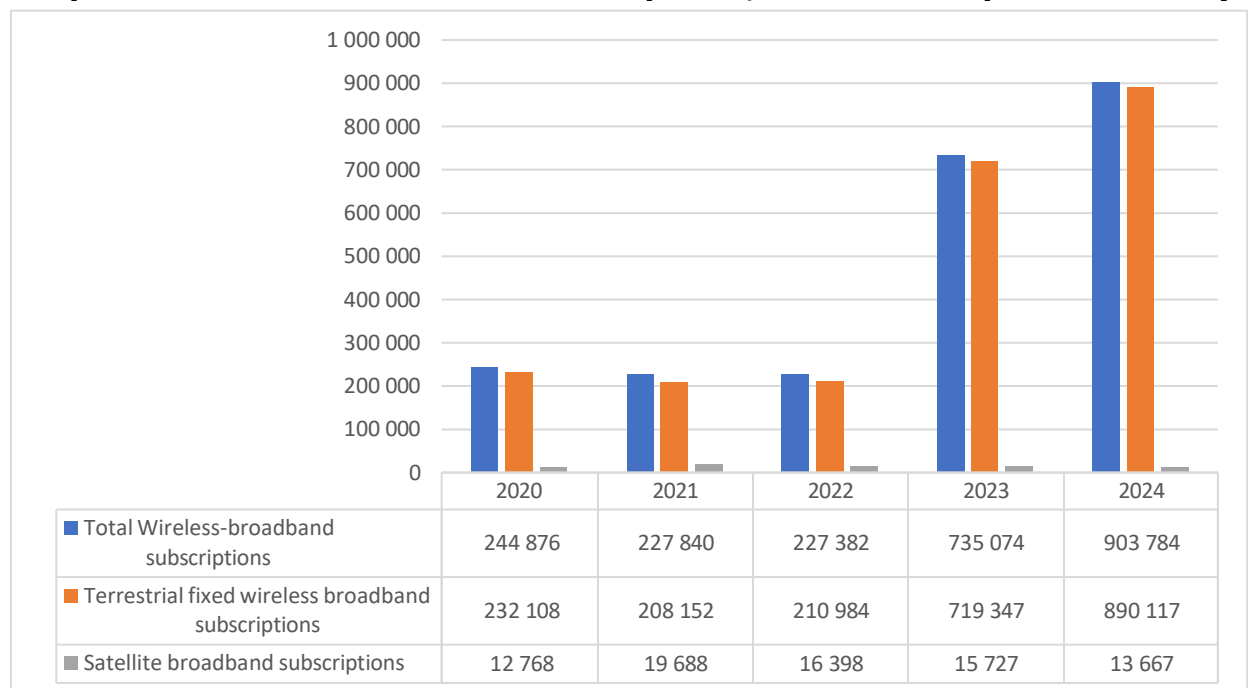
<sup>8</sup> M2M mobile-network subscriptions. M2M mobile-network subscriptions refers to the number of mobile-cellular machine- to-machine subscriptions that are assigned for use in machines and devices (cars, smart meters, consumer electronics) for the exchange of data between networked devices and are not part of a consumer subscription. For instance, SIM-cards in personal navigation devices, smart meters, trains, and automobiles should be included. Mobile dongles and tablet subscriptions should be excluded.

#### 4.10.7 Wireless-Broadband subscriptions

From 2023 to 2024, total wireless broadband subscriptions experienced a significant increase, rising from 735,074 to 903,784, reflecting growth in demand for wireless internet solutions. The increase was driven primarily by terrestrial fixed wireless broadband subscriptions, which rose from 719,347 to 890,117. This growth suggests a preference towards terrestrial wireless solutions, compared to satellite broadband. Satellite broadband subscriptions declined slightly from 15,727 to 13,667, continuing the trend of decreased demand for satellite-based services in favour of terrestrial options.

The CAGR for wireless broadband subscriptions was approximately 38.61%, driven largely by the significant increase in terrestrial fixed wireless broadband adoption over the year.

**Graph 34: Wireless-broadband subscriptions, as of 30th September each year.**



Source: ICASA Electronic Communications Questionnaire 2020 - 2024.



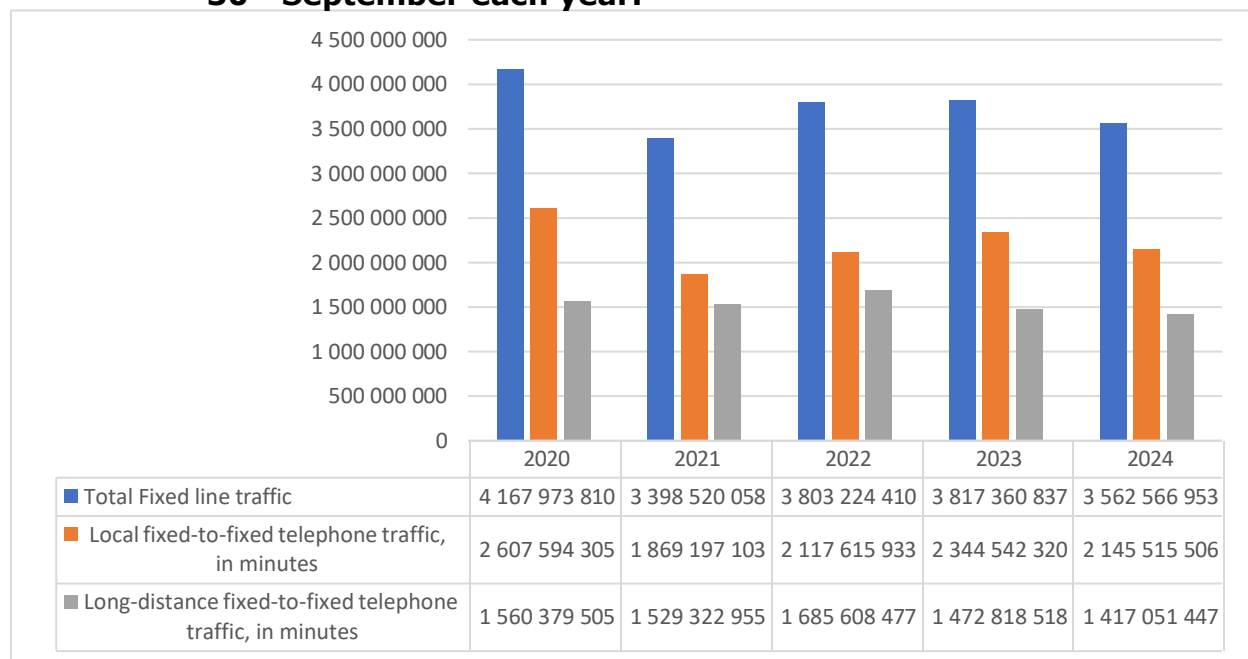
#### **4.11 Network Traffic**

This section explores the usage patterns of telecommunication operator networks, with a primary focus on traffic volume measured in minutes. It provides valuable insights into how extensively these networks are leveraged for diverse communication activities, including voice calls, video calls, messaging, and data-driven services. By analysing traffic trends, operators can assess customer demand, identify peak usage periods, and predict future network requirements. Such analysis is essential for effective capacity planning, network optimization, and the timely deployment of technological upgrades. Additionally, it helps enhance service quality and reliability, ensuring that operators can meet the growing expectations of users in an increasingly digital and connected landscape.

### 4.11.1 Fixed Line Traffic

In 2024, the overall volume of fixed line traffic experienced a notable decline of 6.67%. This downturn was primarily driven by a substantial 8.49% reduction in local fixed-to-fixed telephone traffic, indicating a significant shift in communication patterns among users opting for alternative methods of connectivity. Additionally, long-distance fixed-to-fixed telephone traffic also saw a decrease, albeit more modest, dropping by 3.79%. This trend reflects broader changes in consumer behaviour and the increasing prevalence of mobile and internet-based communication services.

**Graph 35: Fixed line traffic, in minutes, for the 12-month period ending 30<sup>th</sup> September each year.**



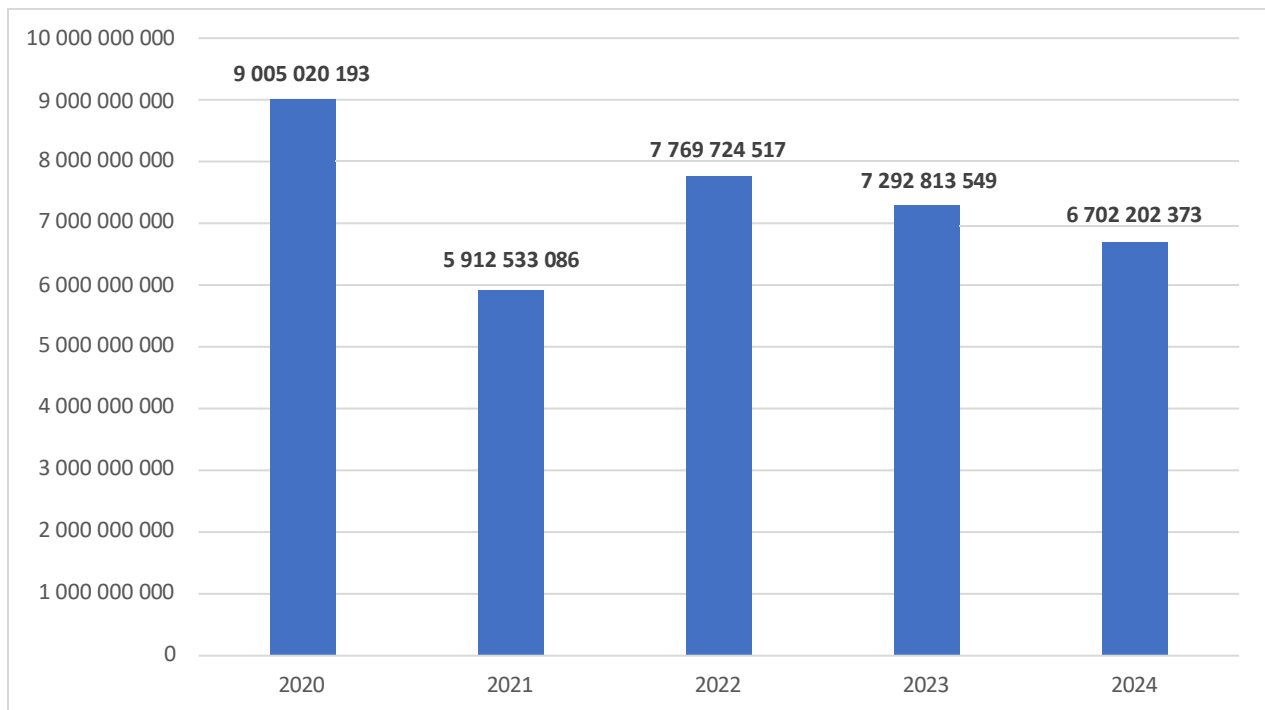
Source: ICASA Electronic Communications Questionnaire 2020 - 2024.

### 4.11.2 Fixed-to-Mobile Telephone Traffic

The volume of fixed-to-mobile telephone call traffic experienced a notable decline, dropping from 7.2 billion minutes in 2023 to 6.7 billion minutes in 2024. This trend reflects a broader shift in communication patterns, as more individuals increasingly rely on mobile phones for their communication needs.

When examining this decline over a five-year period, it is evident that the total fixed-to-mobile call traffic has decreased significantly, plummeting from 9.0 billion minutes in 2020 to just 6.7 billion in 2024. This represents a reduction of 2.3 billion minutes, highlighting a substantial shift in user preferences and behaviour within the telecommunications landscape. The ongoing evolution of technology and the proliferation of mobile communication are likely key factors contributing to this trend.

**Graph 36: Fixed-to-mobile telephone traffic minutes, for the 12-month period ending 30<sup>th</sup> September each year.**



Source: ICASA Electronic Communications Questionnaire 2020 – 2024.

\*One of the operators change 2023 figure\*

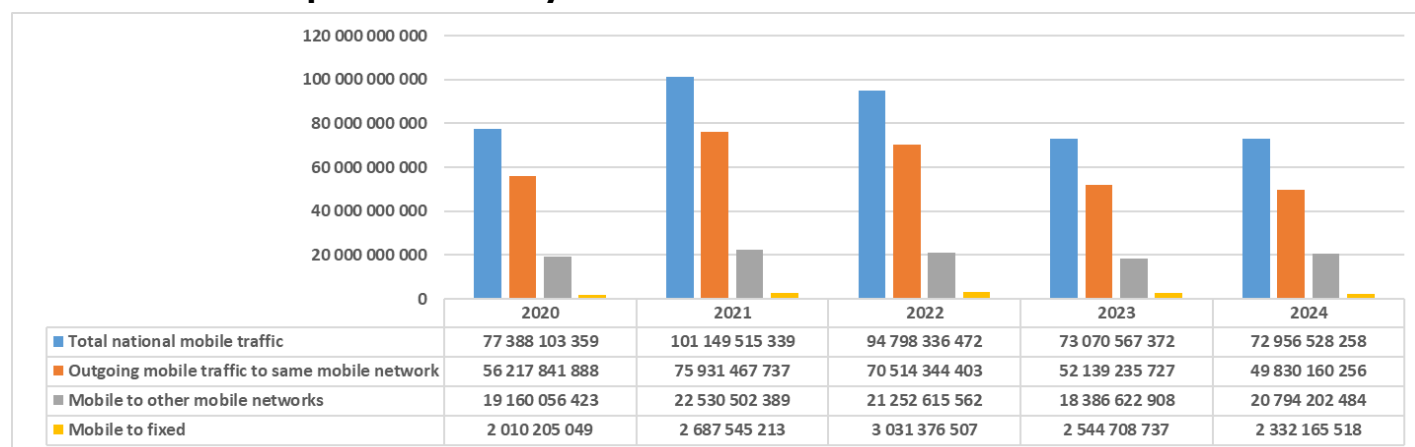
### 4.11.3 Total National Mobile Traffic (Minutes)

In 2024, national mobile traffic experienced a modest decline of 0.16%, indicating a slight reduction across various traffic categories. Notably, outgoing mobile traffic within the same network saw a significant decrease of 4.43%. In contrast, traffic from mobile to other mobile networks demonstrated robust growth of 13.09%, highlighting a trend in consumer demand for cross-network communication.

The most prominent drop was recorded in mobile-to-fixed traffic, which fell by 8.35%. This decline could imply a continued shift away from traditional fixed-line services as consumers increasingly rely on mobile devices for all types of communication.

Analysing the five-year trajectory, total national mobile traffic demonstrated an overall negative CAGR of 1.46%. Specifically, outgoing traffic to the same mobile network declined at a CAGR of 2.97%. In contrast, mobile-to-fixed traffic increased at a CAGR of 3.78%, reflecting a growing preference for landline alternatives over the years. Meanwhile, calls to other mobile networks recorded a modest but positive CAGR of 2.07%, indicating a steady demand for inter-network communication despite the overall decline in traffic.

**Graph 37: Mobile voice traffic in minutes for the 12-month period ending 30<sup>th</sup> September each year.**

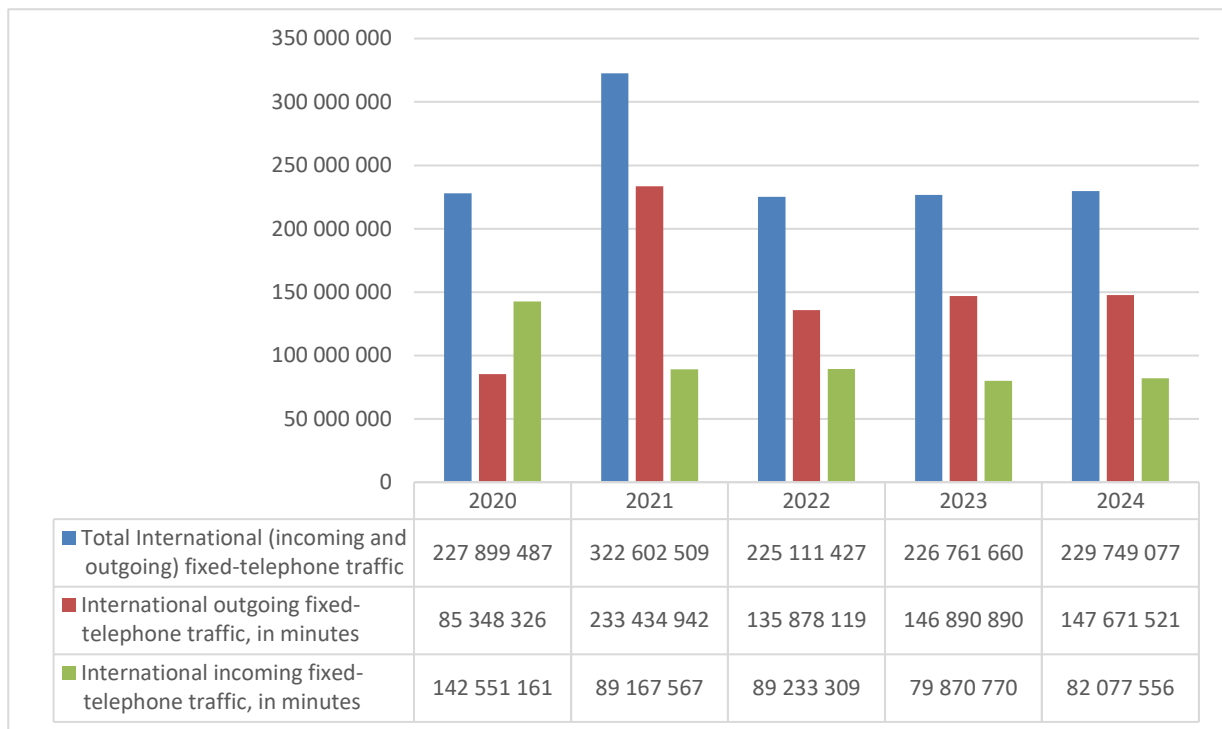


Source: ICASA Electronic Communications Questionnaire 2020 – 2024

#### 4.11.4 International Incoming and Outgoing Fixed Telephone Traffic

The total volume of international fixed-telephone traffic, encompassing both incoming and outgoing calls, experienced a notable increase, from 226 million minutes in 2023 to 229 million minutes in 2024.

**Graph 38: International fixed line traffic in minutes (million) for the 12-month period ending 30<sup>th</sup> September each year.**



Source: ICASA Electronic Communications Questionnaire 2020 - 2024.

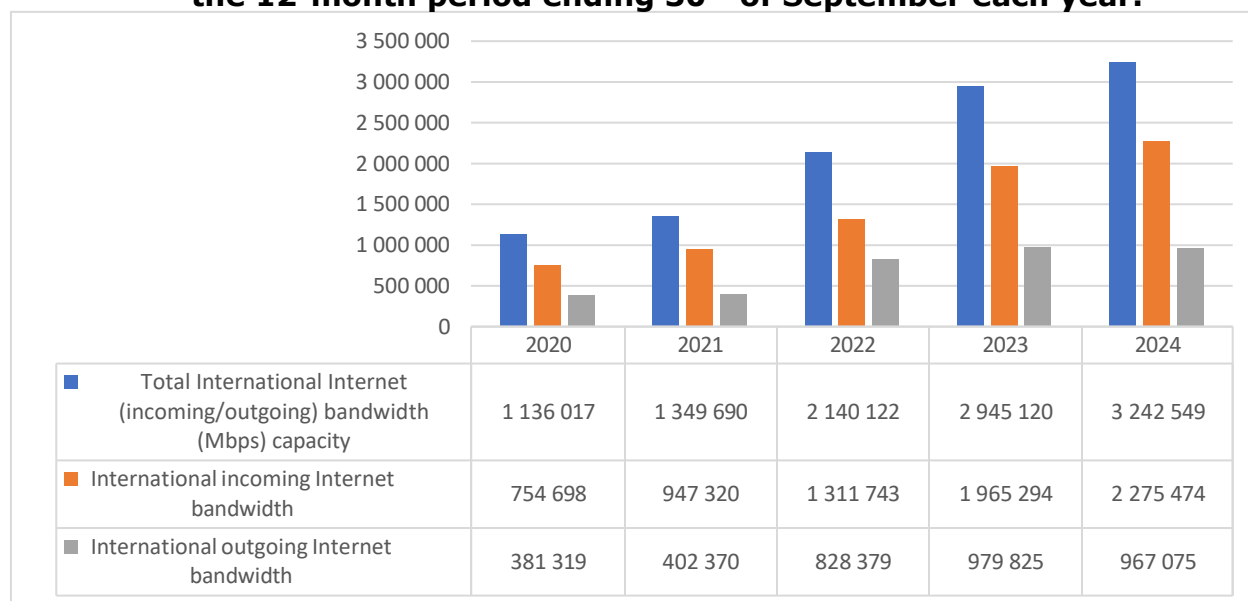
\*One of the operators changed 2023 figure\*

#### 4.12 International Internet Bandwidth Capacity in Megabits per second (“Mbps”)

The total international internet bandwidth capacity increased by 10.10%, reaching 3.2 million Mbps in 2024 from 2.9 million Mbps in 2023. International incoming internet bandwidth experienced the highest growth, increasing by 15.78%. In contrast, international outgoing internet bandwidth decreased by 1.30%. This growth in incoming capacity highlights the growing demand for global digital content and cloud services, driven by digital transformation and increased data consumption. The slight decline in outgoing bandwidth suggests a slower demand for data exports.

From 2020 to 2024, total international internet bandwidth capacity grew at a CAGR of 29.98%. International incoming bandwidth had a CAGR of 31.77%, while outgoing bandwidth maintained a lower CAGR of 26.20%, despite fluctuations.

**Graph 39: International internet bandwidth Megabits per second (Mbps) for the 12-month period ending 30<sup>th</sup> of September each year.**



Source: ICASA Electronic Communications Questionnaire 2020 – 2024

## 4.13 Comparison of Internet Speeds Global

The Speedtest Global Index by OOKLA's Speedtest Intelligence<sup>9</sup> ranks countries, including South Africa, based on their internet speeds for mobile and fixed broadband. Its purpose is to provide insights into the nation's broadband performance, track technological progress, and benchmark connectivity against global standards.

### 4.13.1 South Africa's Internet Speed

In 2025, South Africa's fixed broadband speed achieved a global ranking of 102 out of 154 countries, with a commendable download speed of 48.51 Mbps and an upload speed of 39.75 Mbps. This notable increase illustrates a significant improvement from 2021, when the average download speed stood at 38.25 Mbps, highlighting the ongoing expansion and enhancement of the country's broadband infrastructure and services.

In the realm of mobile broadband, South Africa is ranked 61 out of 110 countries, boasting a download speed of 49.81 Mbps and a notably lower upload speed of 9.19 Mbps in 2025. This figure also marks an impressive rise from 38.95 Mbps in 2021, reflecting advancements in mobile technology and network coverage across the nation. Although there has been progress, further efforts are needed to enhance the growth of broadband services in order to improve South Africa's global ranking.

**Table 2: South Africa Speedtest 2021-2025**

Fixed Broadband					
Year	2021	2022	2023	2024	2025
Fixed Broadband speed (ranking)	87	100	95	103	102
Fixed Broadband download speed (Mbps)	38,25	28,63	43,23	43,66	48,51
Fixed Broadband upload speed (Mbps)	26,3	23,16	33,06	37,24	39,75
Mobile Broadband					
Year	2021	2022	2023	2024	2025
Mobile Broadband speed (ranking)	55	61	58	53	61
Mobile download speed (Mbps)	38,95	30,36	34,71	47,95	49,81
Mobile upload speed (Mbps)	10,71	7,12	6,79	8,13	9,17

Source: OOKLA, Speedtest intelligence 2021 - 2025.

<sup>9</sup> OOKLA Speedtest Global Index February 2025 <<https://www.speedtest.net/>>

### 4.13.2 BRICS Speedtest

China leads in fixed broadband performance with a speed ranking of 14, a download speed of 230.11 Mbps, and an upload speed of 45.1 Mbps. Brazil follows with a ranking of 25 and strong upload speeds of 96.72 Mbps. Russia ranks 66, with comparable upload of 92.42 Mbps but lower download speeds of 89.7 Mbps. India ranks 93 with moderate speeds, while South Africa has the lowest ranking at 102, with download and upload speeds of 48.51 Mbps and 39.75 Mbps, respectively.

China holds the top position in mobile broadband, ranking 8<sup>th</sup> globally with download and upload speeds of 147.14 Mbps and 24.28 Mbps, respectively. India ranks 23, followed by Brazil at 39, with slightly lower download speeds of 85.34 Mbps. South Africa ranks 61, with download and upload speeds of 49.81 Mbps and 9.17 Mbps, respectively. Russia, at 89, has the slowest download of 27.34 Mbps and upload of 8.36 Mbps speeds.

**Table 3: BRICS Speedtest 2025**

Fixed Broadband					
	China	Brazil	Russia	India	South Africa
Fixed Broadband speed (ranking)	14	25	66	93	102
Fixed Broadband download speed (Mbps)	230,11	185,78	89,7	62,62	48,51
Fixed Broadband upload speed (Mbps)	45,1	96,72	92,42	57,24	39,75
Mobile Broadband					
	China	India	Brazil	South Africa	Russia
Mobile Broadband speed (ranking)	8	23	39	61	89
Mobile download speed (Mbps)	147,14	103,75	85,34	49,81	27,34
Mobile upload speed (Mbps)	24,28	9,65	14,11	9,17	8,36

Source: OOKLA, Speedtest intelligence 2025



#### **4.14 International Comparison of South Africa’s ICT Development Index (“IDI”) ranking scores**

Comparing South Africa with BRICS countries (Brazil, Russia, India, China, and South Africa) in the ICT Development Index (“IDI”) is essential for benchmarking its digital progress and identifying areas of improvement. The IDI, developed by the ITU, measures the extent to which connectivity is universal and meaningful. It comprises of ten indicators grouped into two pillars: Universal and Meaningful Connectivity (“UMC”).

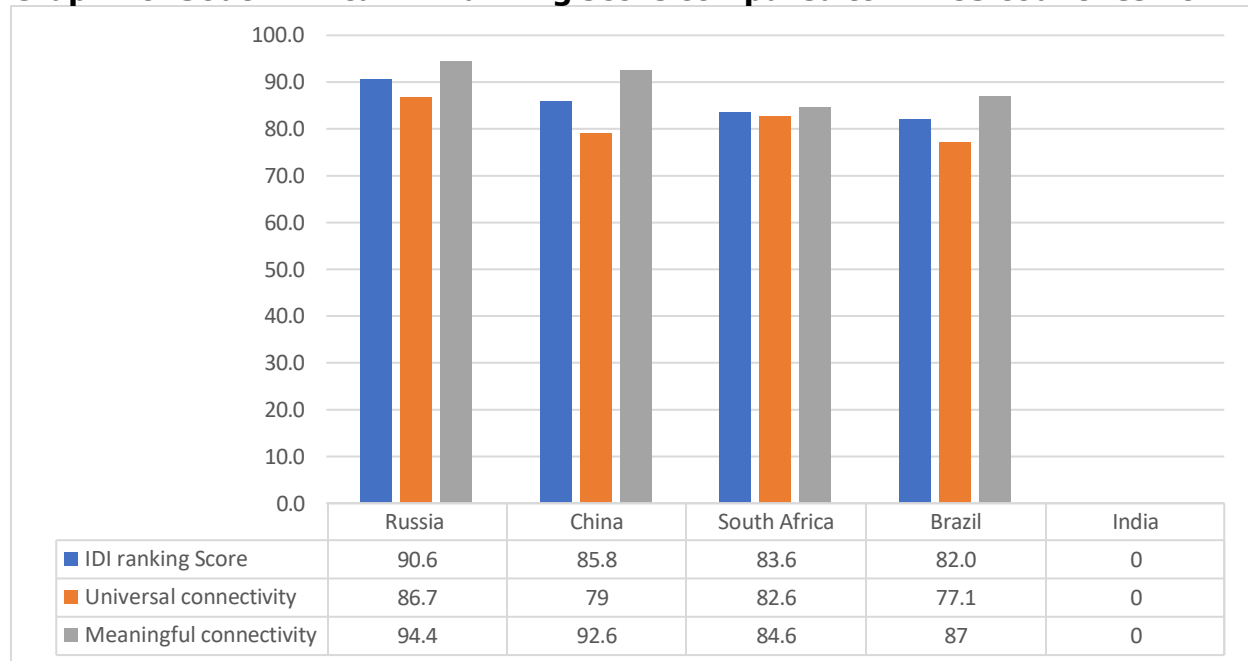
Comparing South Africa’s IDI ranking against its BRICS counterparts helps policymakers assess how effectively the country is bridging the digital divide and adopting technological advancements.

Given that BRICS nations have similar developmental goals, this comparison provides insights for enhancing connectivity infrastructure and increasing broadband penetration.

#### 4.14.1 BRICS IDI ranking scores.

According to the ITU ranking scores<sup>10</sup>, Russia is leading with a score of 90.6, followed by China at 85.8 and South Africa at 83.6. Brazil ranks lower at 82.0, while India did not participate in the study. For universal connectivity, Russia scores highest at 86.7, and China lags at 79. In meaningful connectivity, Russia leads with 94.4, followed by China at 92.6. South Africa shows a balance between universal and meaningful connectivity at 82.6 and 84.6, respectively. Brazil scored 77.1 for universal and 87 for meaningful connectivity. The absence of India's data creates a gap in comparing digital progress within BRICS countries.

**Graph 40: South Africa IDI ranking score compared to BRICS countries 2024.**



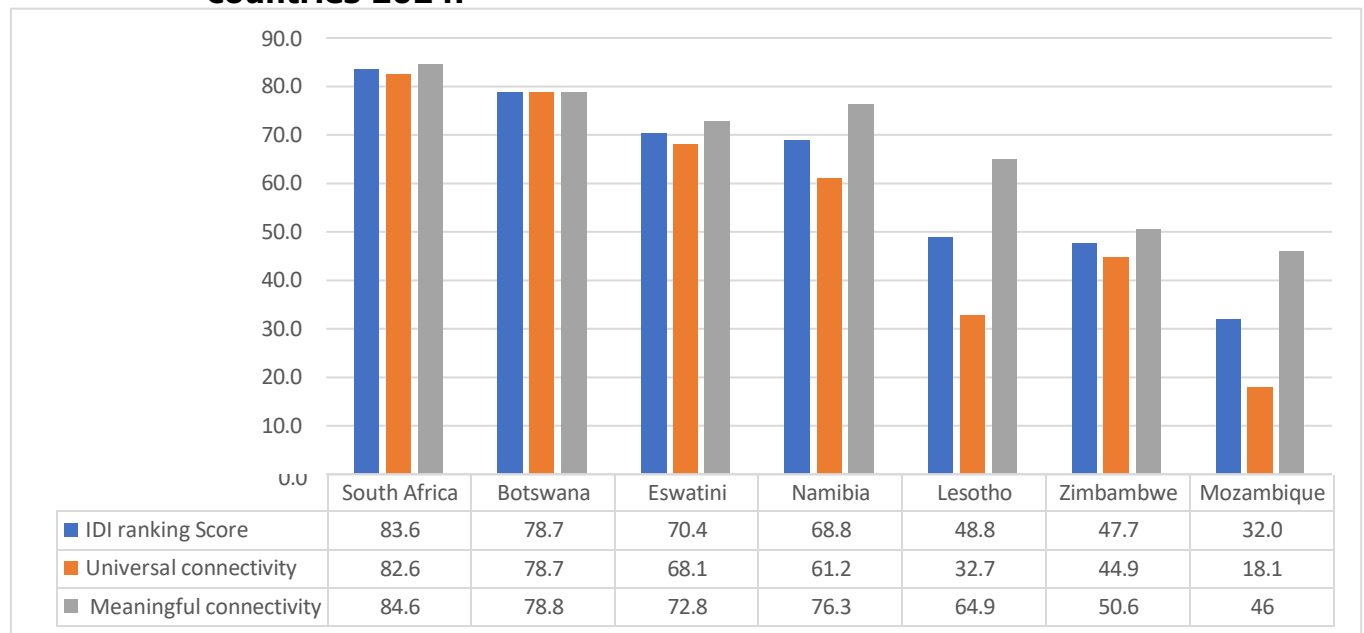
Source: ITU database, 2024.

<sup>10</sup> ITU Measuring Digital Development: Facts and Figures, 2024 <[https://www.itu.int/hub/publication/d-ind-ict\\_mdd-2024-3/](https://www.itu.int/hub/publication/d-ind-ict_mdd-2024-3/)>

#### 4.14.2 IDI Ranking Score for South Africa with Neighbouring Countries.

South Africa leads in the IDI among the listed Southern African Development Community (“SADC”) countries with a score of 83.6, demonstrating strong universal connectivity at 82.6 and meaningful connectivity at 84.6. Botswana follows closely at 78.7, excelling in both dimensions. Eswatini and Namibia show moderate progress, with Eswatini leading in meaningful connectivity at 72.8. Lesotho at 48.8 and Zimbabwe at 47.7 have low scores, highlighting challenges in universal and meaningful connectivity. Lastly, Mozambique ranks the lowest at 32.0, with only 18.1 for universal connectivity.

**Graph 41: South Africa IDI ranking score compared to international countries 2024.**



Source: ITU database, 2024.

#### **4.14.3 SADC Data-only mobile-broadband basket Percentage of Gross National Income (GNI) Per Capita (p.c.)**

ICT price basket statistics<sup>11</sup> provide a standardized method for consolidating the prices of various ICT services, enabling a systematic evaluation of affordability across different countries. Developed and standardized by the ITU through its Expert Group on Telecommunication/ICT Indicators (EGTI), these baskets include essential ICT services such as mobile cellular, data-only mobile broadband, bundled mobile data and voice services, and fixed broadband services, all presented in comparable terms.

By aggregating ICT service prices into standardized units, these price baskets facilitate detailed cross-country comparisons and robust analyses of affordability. This provides valuable insights into economic accessibility levels across various regions. The framework allows policymakers and researchers to identify affordability patterns, which can inform targeted interventions aimed at improving access to digital services and enhancing global digital inclusion.

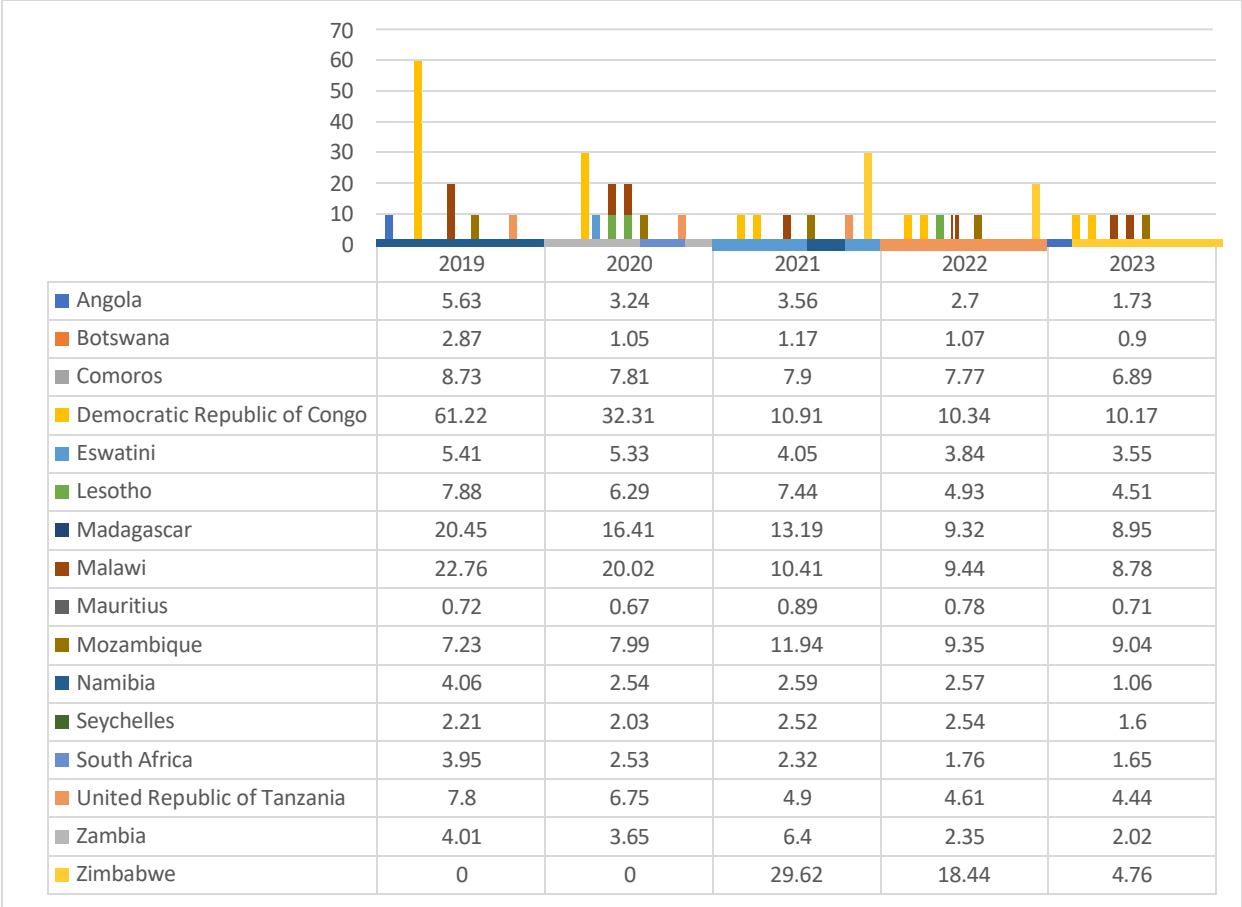
The ICT price basket statistics support the UMC framework, promoting inclusive digital access through affordability and service quality. The UN Broadband Commission recommends ICT prices not exceed 2% of a country's monthly GNI per capita, highlighting the importance of reducing costs for universal digital access.

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<sup>11</sup> ITU ICT Price Basket Statistics Manual <[ITU\\_IPBQManual\\_2025.pdf](#)>

In 2023, data-only mobile broadband basket as a percentage of GNI per capita shows significant improvements in affordability. Angola saw a remarkable drop to 1.73%, while Namibia was at 1.06% and South Africa at 1.65% achieved competitive rates. Mauritius remains the most affordable at 0.71%. Conversely, affordability challenges persist in the Democratic Republic of Congo at 10.17%, Mozambique at 9.04%, and Madagascar at 8.95%. Zimbabwe's substantial decline to 4.76% is notable.

**Graph 42: SADC Data-only mobile-broadband basket % of GNI p.c.**

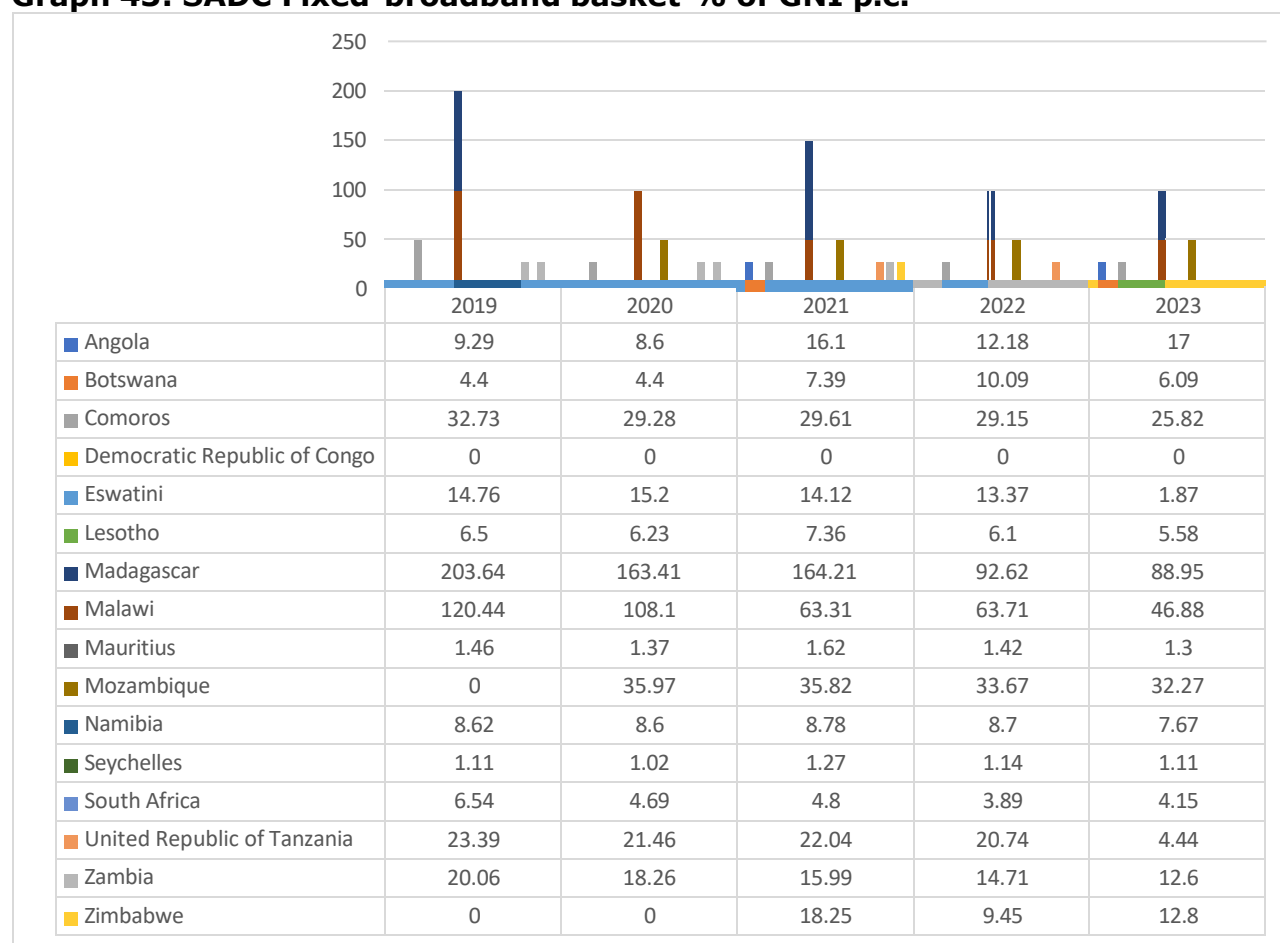


Source: ITU database, 2019 - 2023.

#### 4.14.4 SADC Fixed-broadband basket % of GNI p.c.

The 2023 SADC fixed-broadband basket as a percentage of GNI per capita shows varied progress in affordability. Mauritius at 1.3% and Seychelles at 1.11% maintain the most affordable rates of fixed broadband. Eswatini achieved a drastic reduction to 1.87%. South Africa increased slightly to 4.15%, while Botswana improved to 6.09%. Angola at 17% and Comoros at 25.82% remain high-cost markets, and Madagascar, though improved, remains a concern at 88.95%. Malawi at 46.88% also faces significant affordability challenges. Zambia at 12.6% and Zimbabwe at 12.8% show gradual improvements.

**Graph 43: SADC Fixed-broadband basket % of GNI p.c.**



Source: ITU database, 2019 - 2023.

#### **4.15 Number of Schools Connected to the Internet Based on Obligations Imposed by ICASA**

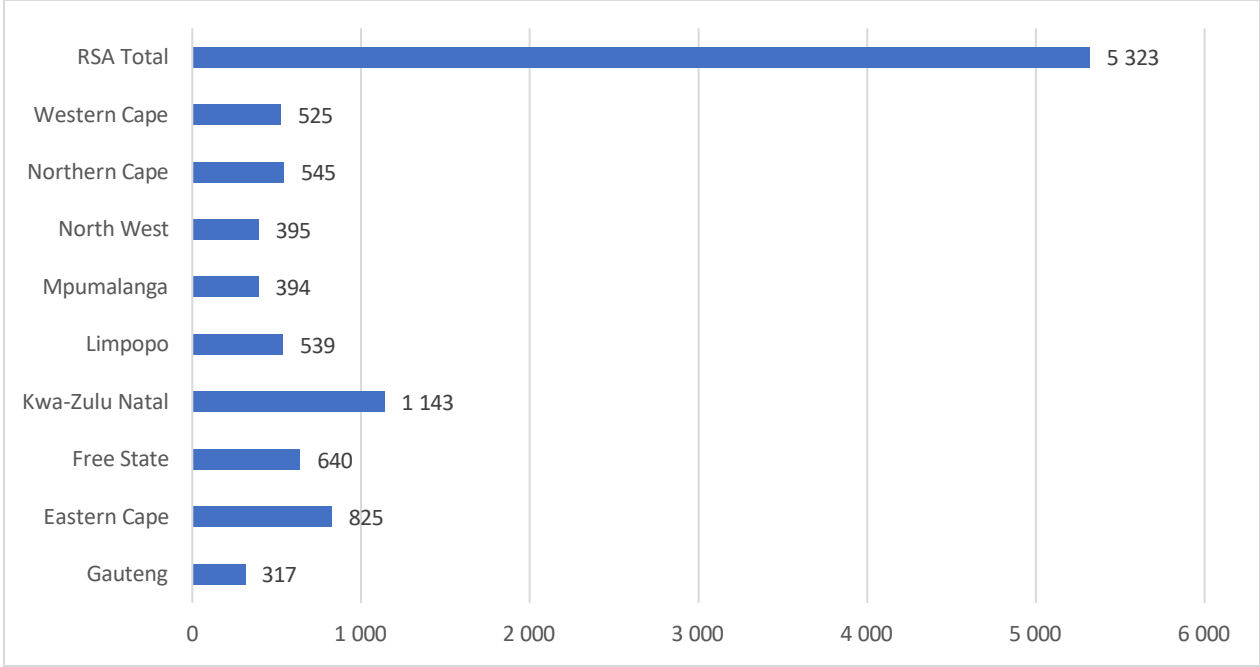
While a commendable 5,323 schools have been connected to the internet, this number still falls short, particularly in rural and remote areas where connectivity remains a significant challenge. In response to this pressing issue, ICASA, as part of its universal obligations regarding the 2022 spectrum auction, has established requirements for successful licensees to connect an additional 16,139 schools.

In conjunction with these school connections, ICASA is also working to provide internet access to 3,342 government clinics, 890 government hospitals, 570 public libraries, and 937 traditional offices.

By emphasizing the importance of equitable access to technological resources, ICASA aims to bridge the digital divide that exists within society. This effort is vital for ensuring that all students, regardless of their geographic locations or socio-economic status, have the ability to engage comprehensively in educational activities. Such initiatives are crucial in empowering the next generation, equipping them with the essential skills and knowledge they need to succeed in an increasingly interconnected and digital world.

The total number of schools connected to the internet based on universal service obligations imposed by ICASA stands at 5,323 across South Africa. KwaZulu-Natal leads with 1,143 connected schools, followed by the Eastern Cape at 825 and the Free State at 640. The Northern Cape at 545, Limpopo at 539, and Western Cape at 525 show moderate progress, while North West at 395, Mpumalanga at 394, and Gauteng at 317 have fewer connected schools.

**Graph 44: Number of schools connected to the internet as of 2025.**



Source: ICASA Compliance & Consumer Affairs database, 2025.



## 5 THE BROADCASTING SECTOR

ICASA plays a critical role in regulating the country's broadcasting in the public interest, and to ensure fairness and a diversity of views broadly representing the South African society. ICASA ensures compliance with established broadcasting standards, providing oversight to ensure fair practices and inclusivity.

The broadcasting sector is evolving, leading to new market structures and business models, especially with the rise of Over-the-Top (OTT)<sup>12</sup> services, which pose both opportunities and challenges for broadcasters. In July 2023, the Department of Communications and Digital Technologies released a draft White Paper on Audio and Audiovisual Media Services and Online Content Safety to address the shift in content consumption via the Internet in South Africa<sup>13</sup>. This document includes proposed policies aimed at promoting inclusive Audio and Audio-Visual Content Services (AAVCS) for socio-economic development. Although ICASA does not currently license OTT services, it assesses their impact on market competition. For instance, the Authority is currently examining the impact of OTT services on competition in the subscription broadcasting service market. ICASA also monitors studies from international organizations regarding the impact of OTT services.

ICASA also focuses on employment within the broadcasting sector. While the industry faces economic pressures, particularly in terms of revenue generation, ICASA continues to monitor employment trends and gender representation. This oversight highlights the need for development initiatives that foster a more diverse and sustainable workforce, ensuring equal opportunities for all.

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<sup>12</sup> Definition of what OTT services are found online

< [https://www.itu.int/dms\\_pub/itu-t/opb/tut/T-TUT-ECOPO2017-PDF-E.pdf](https://www.itu.int/dms_pub/itu-t/opb/tut/T-TUT-ECOPO2017-PDF-E.pdf) >

<sup>13</sup> Government Notice No. 1934 published under Government Gazette No. 49052 dated 31 July 2023.

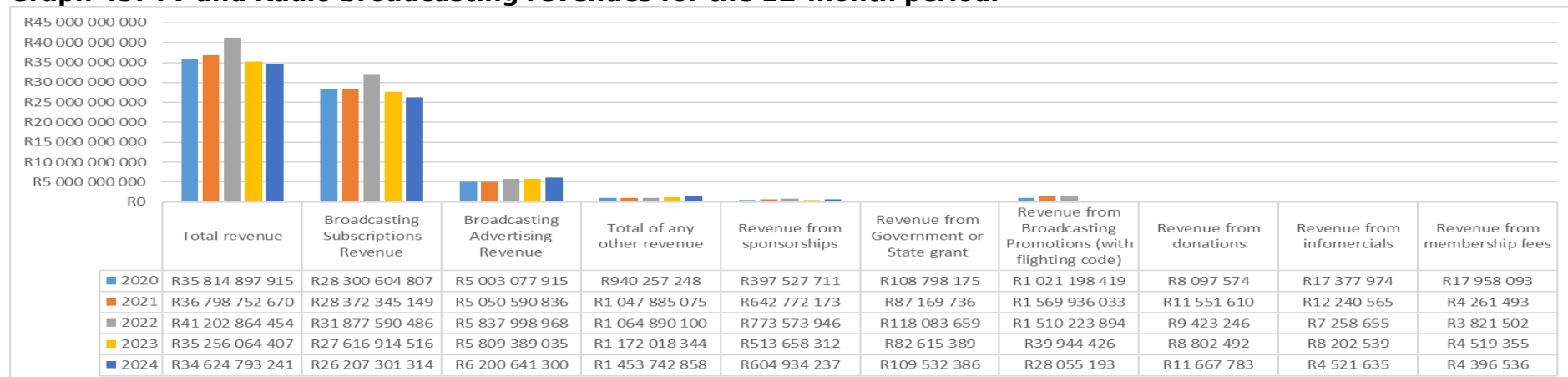
Applicants for community broadcasting service licences encounter difficulties in understanding the licence application requirements. The Authority regularly holds workshops to guide applicants on the legislative and regulatory requirements. The Authority rigorously evaluates new applicants to maintain the integrity of community broadcasting services. Only those who meet the strict application criteria are granted licences, ensuring that community broadcasters remain accountable to the people they serve. This approach is vital in protecting the ethos of community-based media, which plays an important role in promoting local content and diversity in the South African broadcasting landscape.

## 5.1 Broadcasting Revenue

In 2024, the total broadcasting revenue decreased by 1.79% to R34.6 billion. Broadcasting subscriptions saw a significant decline of 5.10%, dropping to R26.2 billion. Conversely, broadcasting advertising revenue increased by 6.73% from R5.8 billion in 2023 to R6.2 billion, showing resilience amidst other revenue challenges. Revenue from other sources, such as government grants and infomercials, remained relatively inconsistent. Notably, revenue from sponsorships increased marginally, while donations also rose slightly in 2024. However, revenue from broadcasting promotions and membership fees saw substantial declines, indicating a reduced reliance or audience interest in these areas.

Over five years, total revenue recorded a negative CAGR of 0.84%. Broadcasting subscriptions had a CAGR decline of 1.90%, while broadcasting advertising revenue-maintained growth with a CAGR of 5.51%, indicating a stable advertising market.

**Graph 45: TV and Radio broadcasting revenues for the 12-month period.**

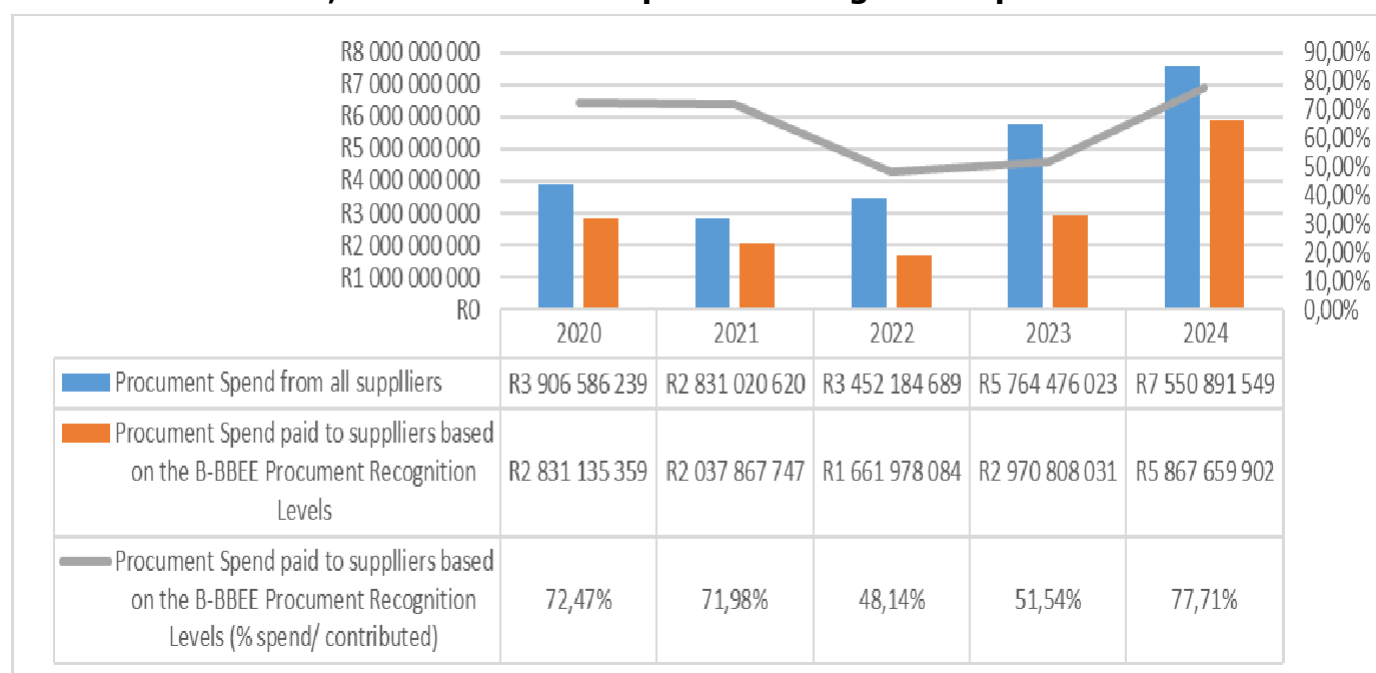


Source: ICASA Broadcasters Questionnaire, December 2020- 2024 (\*data includes TV & radio broadcasting\*).

## 5.2 Broadcasting Black Economic Empowerment Measures

The share of procurement expenditure allocated to suppliers, determined by their B-BBEE procurement recognition level, saw a significant rise from 51.54% in 2023 to an impressive 77.71% in 2024. This notable increase underscores a growing commitment to supporting suppliers who meet recognized standards of Broad-Based Black Economic Empowerment.

**Graph 46: Broadcasting sector procurement spend to all suppliers based on B-BBEE, for the 12-month period ending 30<sup>th</sup> September.**



Source: ICASA Broadcasters Questionnaire, December 2020 - 2024.

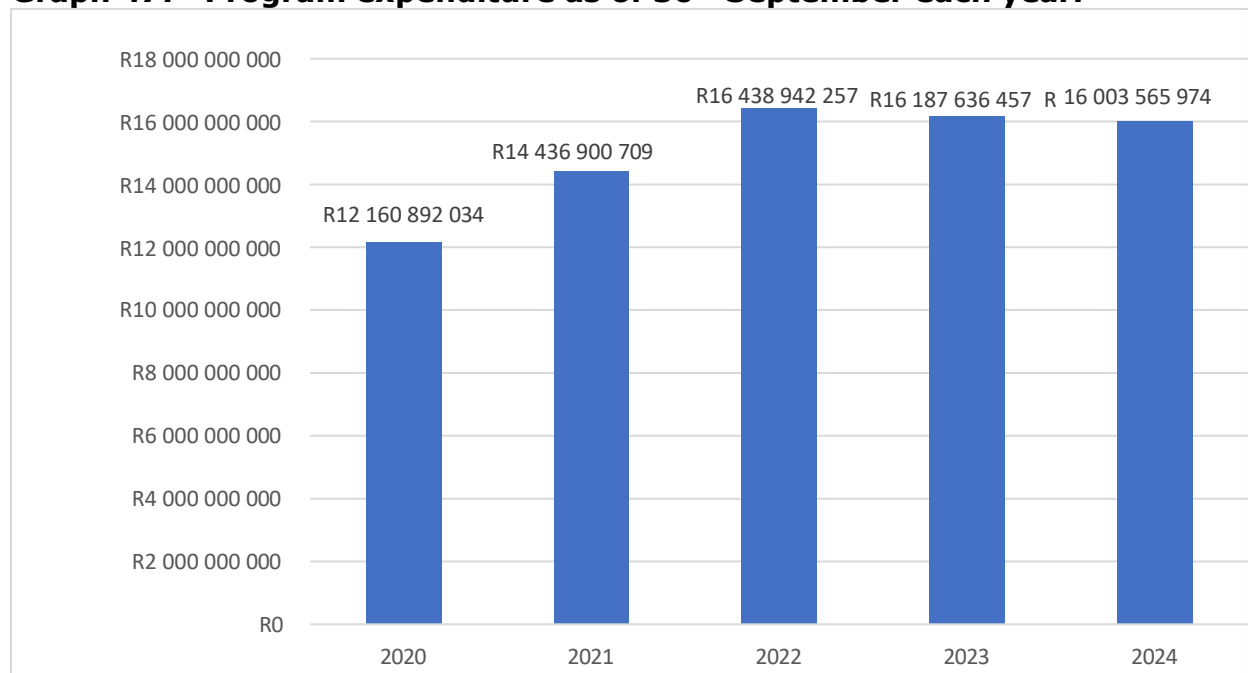
### 5.3 Programme expenditure

Program expenditure typically includes costs incurred by broadcasters to produce and deliver content such as news, entertainment, educational programming, and public service announcements. ICASA plays a vital regulatory role by ensuring that broadcasters comply with content quotas and prioritize public interest programming. ICASA’s oversight helps allocate resources to promote fair competition and maintain high broadcasting standards.

Program expenditure decreased by 1.14% from R16.1 billion in 2023 to R16.0 billion in 2024, representing a slight decrease. This reduction likely indicates major operational cutbacks, content production shifts, and or cost-saving strategies by broadcasters.

For a period of 5 years, the expenditure increased from R12.1 billion in 2020 to R16.0 billion in 2024.

**Graph 47: Program expenditure as of 30<sup>th</sup> September each year.**



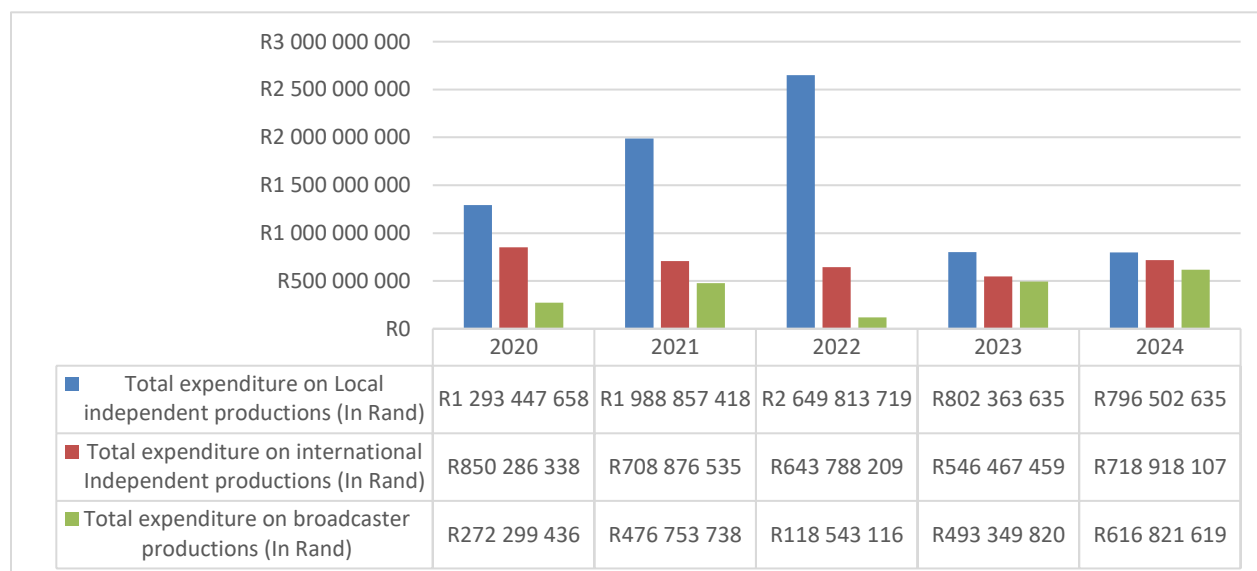
Source: ICASA Broadcasters Questionnaire, December 2020- 2024.

## 5.4 Broadcasting productions expenditure

In the year 2024, the financial landscape of independent production underwent notable changes. The total expenditure allocated for independent local production saw a decline, decreasing from R802 million in 2023 to R796 million in 2024. Conversely, the investment in international independent production witnessed a significant increase, soaring from R546 million in 2023 to R718 million in 2024. This rise may indicate a growing demand for diverse content sourced from global markets. Additionally, broadcaster (in-house) productions experienced a remarkable surge, with expenditures escalating dramatically from R493<sup>14</sup> million in 2023 to an impressive R616 million in 2024. This substantial growth in broadcaster productions suggests a heightened focus on in-house production capabilities and a commitment to delivering original content that resonates with audiences.

For a period of 5 years, the total expenditure on independent broadcaster productions decreased by 22.68%.

**Graph 48: Broadcasting productions expenditure as of 30<sup>th</sup> September each year.**



Source: ICASA Broadcasters Questionnaire, December 2020 - 2024.

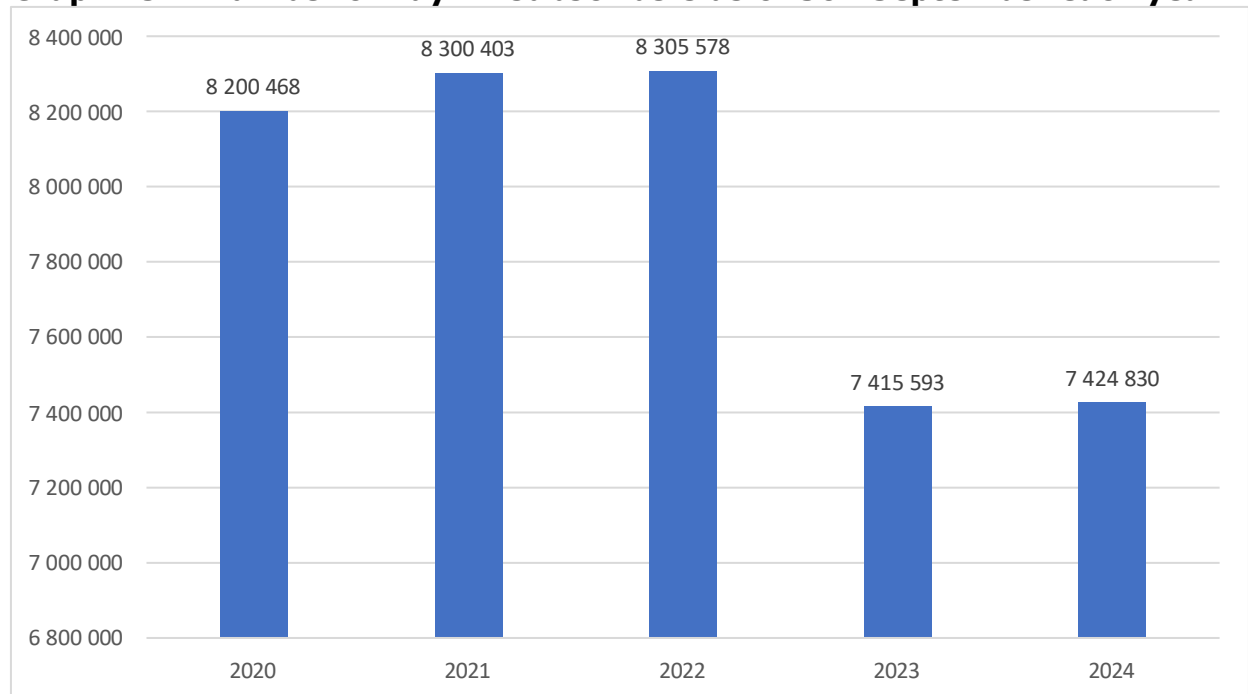
<sup>14</sup> One operator changed 2023 figure

## 5.5 Number of Pay TV Subscribers

The total number of Pay TV subscribers experienced a minimal increase of 0.12%, rising from 7,41 million in 2023 to 7,42 million in 2024. Despite this slight recovery, the broader trend over the period showed a decline in subscriber numbers from the initial 8,20 million in 2020.

Over the five-year period, Pay TV subscribers recorded a negative CAGR of 2.45%, reflecting sustained market pressure from digital alternatives and shifting consumer preferences toward flexible on-demand streaming services.

**Graph 49: Number of Pay TV subscribers as of 30<sup>th</sup> September each year.**



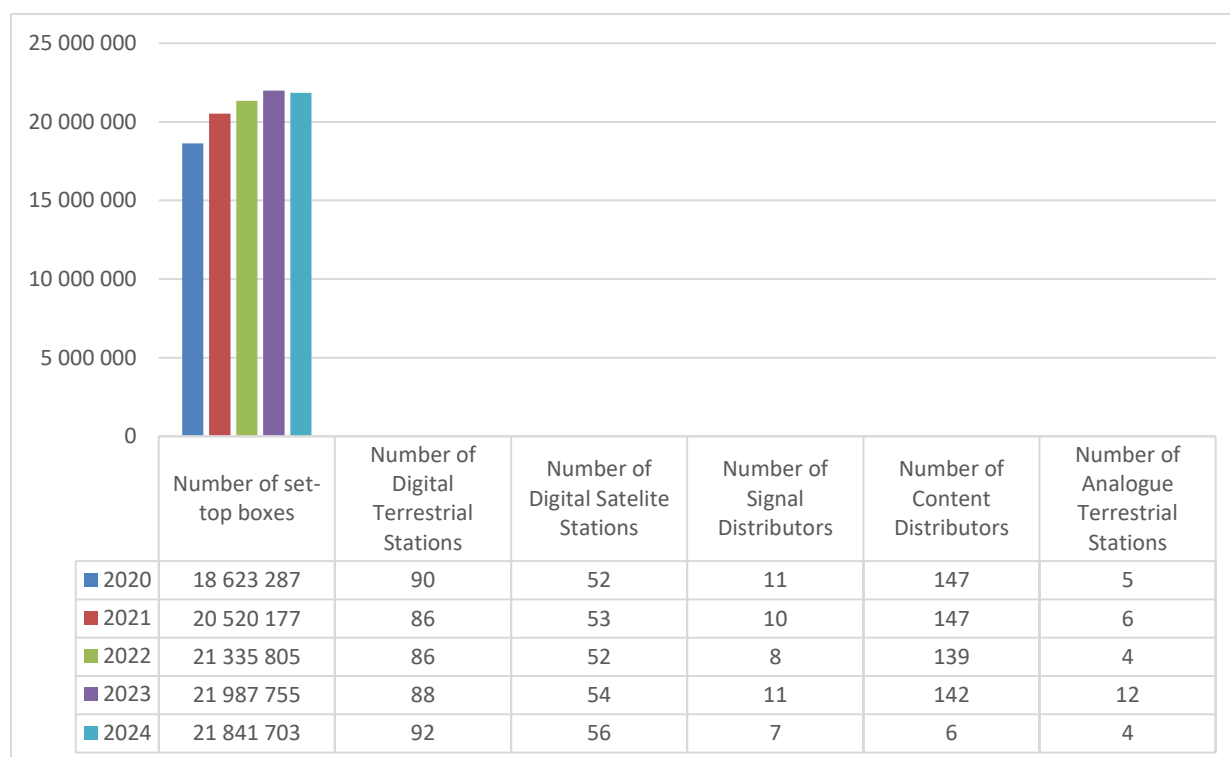
Source: ICASA Broadcasters Questionnaire, December 2020 - 2024.

## 5.6 Total Number of Television Stations and Distributors

The number of set-top boxes decreased slightly by 0.66%, from 21,9 million in 2023 to 21,8 million in 2024. Despite this decline, the number of digital terrestrial stations increased by 4.55% in 2024, while digital satellite stations grew by 3.70% for the same period. The number of signal distributors decreased from 11 in 2023 to 7 in 2024, and content distributors saw a decrease from 142 to 6. The number of analogue terrestrial stations dropped from 12 to 4 for the same period, reflecting a shift towards digital infrastructure.

Over the five-year period, the number of set-top boxes grew at a CAGR of 4.07%, indicating a steady increase despite the slight decline in 2024. Digital terrestrial and satellite stations experienced moderate growth.

**Graph 50: Total Number of Television Stations and Distributors as of 30<sup>th</sup> September each year.**



Source: ICASA Broadcasters Questionnaire, December 2020 - 2024.

\*Government subsidies set-top boxes are not included \*

\*This is based on the information received from licensees in November 2024 \*



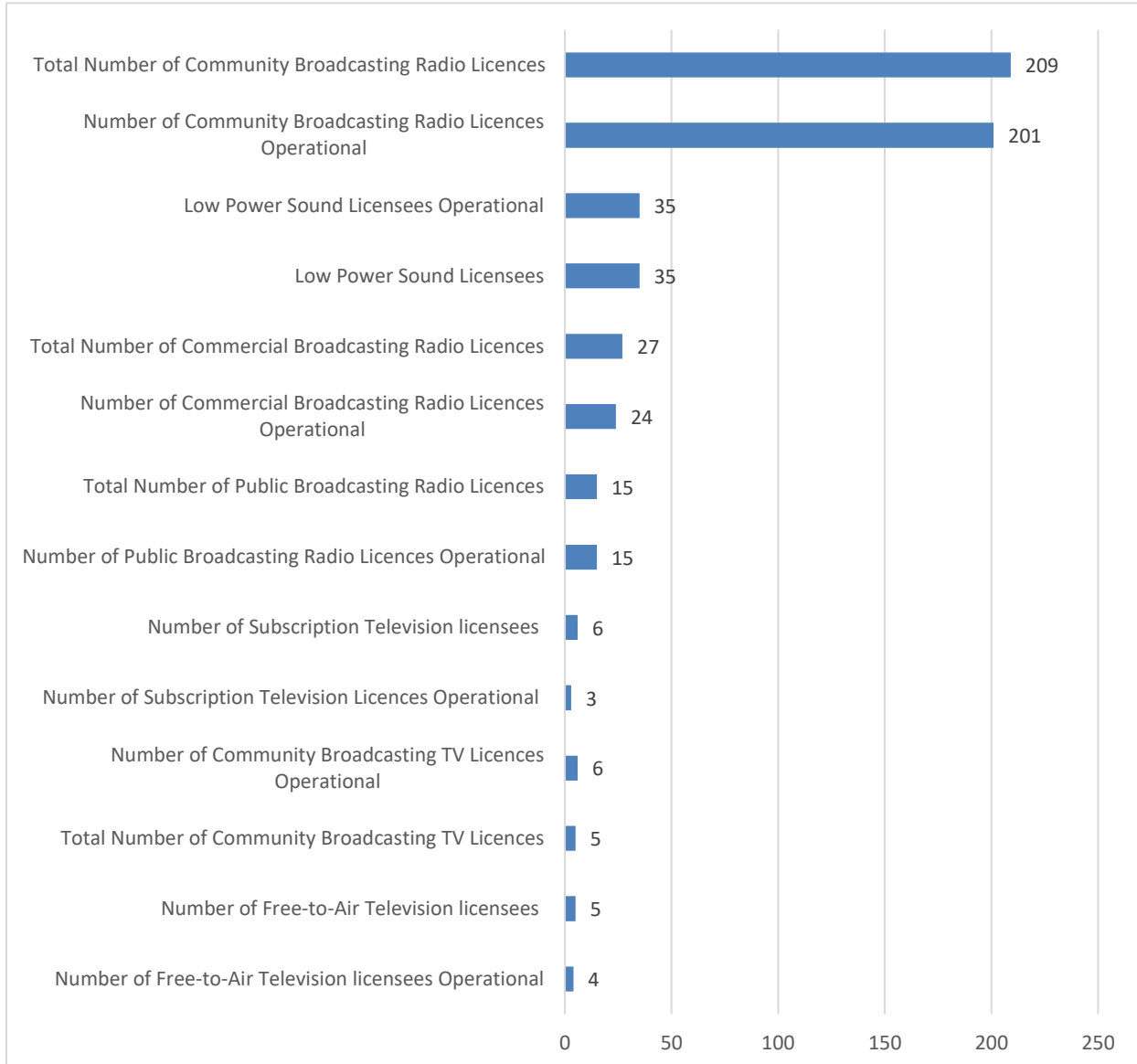
## **5.7 Total Number of TV and Radio licences**

Commercial and community broadcasters who neglected to renew their broadcasting licences within the specified timeframe were directed to cease all operational activities.

This situation underscores the crucial significance of regulatory compliance within the broadcasting sector. It serves as a stark reminder of the serious consequences faced by entities that fail to adhere to licensing requirements, which can lead to operational interruptions, loss of revenue, and diminished trust among viewers and subscribers. The necessity of keeping licensing current is crucial for maintaining the integrity and sustainability of broadcasting services within the industry.

The total number of TV and radio stations in South Africa that the Authority is regulating in 2025 is shown in the graph below.

**Graph 51: Total Number of transmissions and licenses subscriptions.**



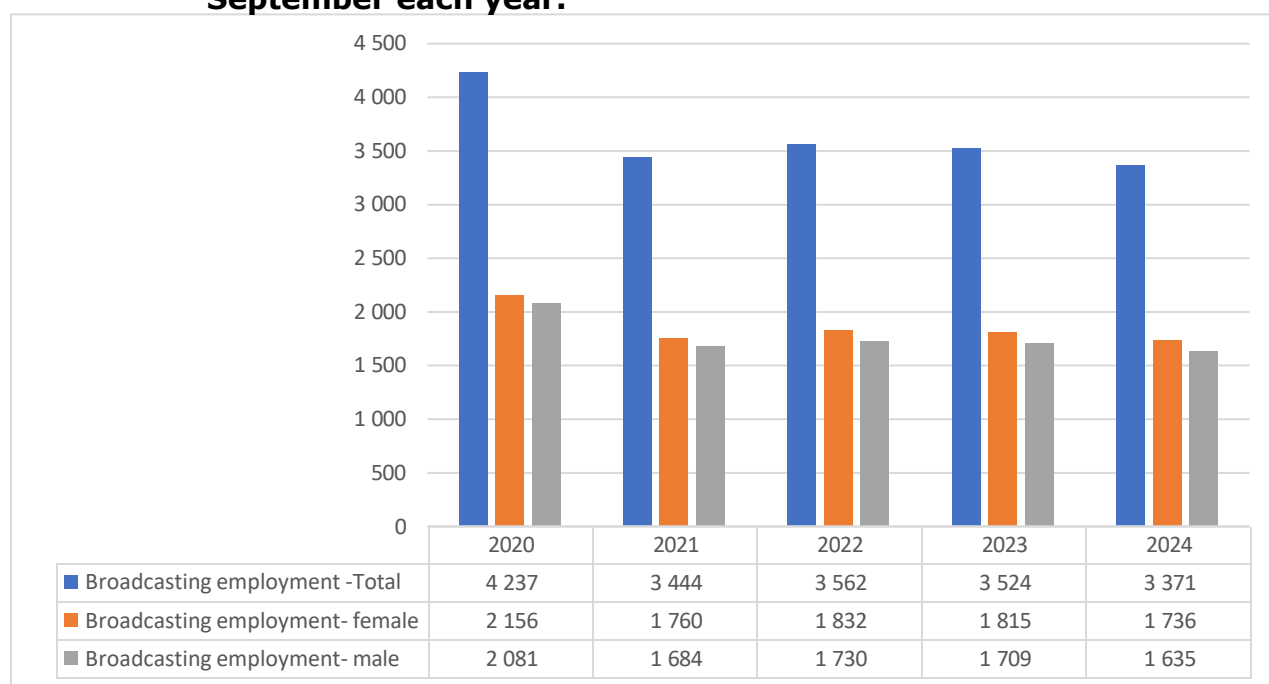
Source: ICASA Licensing and Compliance, 2025.

## 5.9 Broadcasting Sector Employment

In 2024, broadcasting employment overall decreased by 4.34%. Female employment decreased by 4.35%, while male employment saw a decrease of 4.33%. These figures may suggest a shift in workforce requirements within the broadcasting sector.

The CAGR for total broadcasting employment, as well as for male and female employees, was decreasing over the five-year period. Female employment declined with 5.27%, male employment had a slightly higher negative 5.85%, and total employment saw a decline of 5.56%.

**Graph 52: People employed in the broadcasting sector, as of the 30<sup>th</sup> of September each year.**

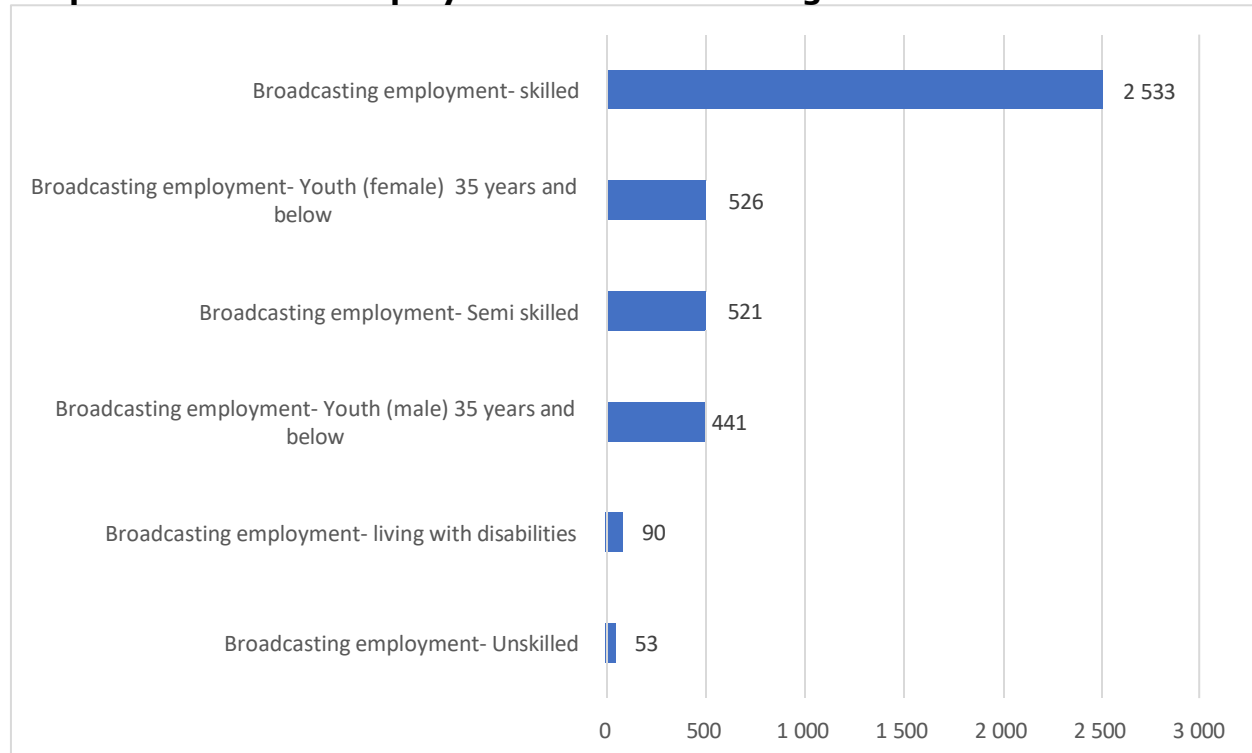


Source: ICASA Broadcasters Questionnaire, December 2020 - 2024.

### 5.9.1 Breakdown of Persons Employed in the Broadcasting Sector

In 2024, broadcasting employment exhibited a diverse workforce distribution. The number of unskilled workers was relatively low, at 53 employees, whilst people living with disabilities amounted to 90. Youth employment, particularly among females and males aged 35 years and below, was notably higher, with 526 females and 441 males engaged in broadcasting roles. Semi-skilled workers accounted for 521, reflecting a significant portion of the workforce with intermediate expertise. Skilled workers dominated the sector, with 2,533 individuals employed, showcasing the importance of expertise in the broadcasting sector. This distribution indicates a strong emphasis on skilled labour alongside efforts to employ youth and diverse groups.

**Graph 53: Persons employed in the broadcasting sector breakdown in 2024.**



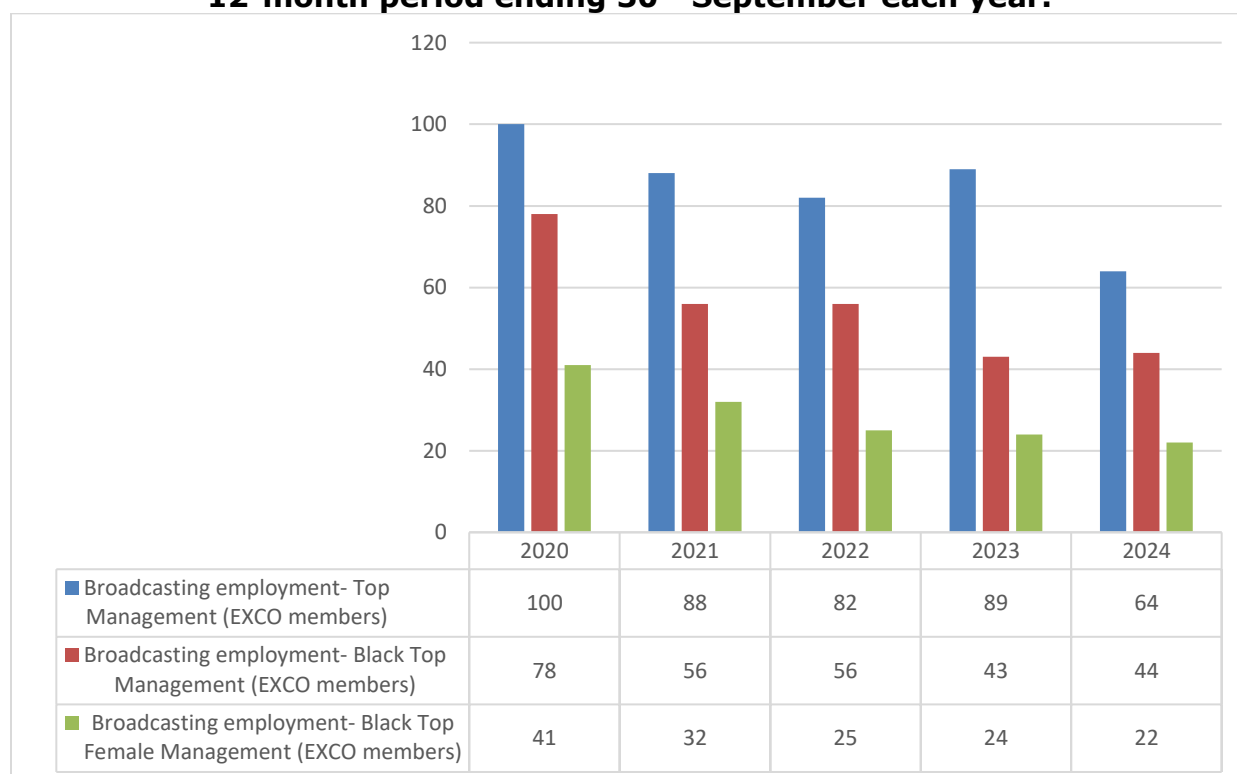
Source: ICASA Broadcasters Questionnaire, December 2024.

## 5.9.2 Proportion of Black People in Top Management in the Broadcasting Sector

The broadcasting employment in top management roles saw a significant decline of 28.09% in 2024. Black top management employment showed a slight increase of 2.33%, reflecting marginal growth in this demographic. However, Black female top management roles decreased by 8.33%.

Over the five years, broadcasting employment in top management roles recorded a negative CAGR of 10.56%. Black top management had a negative CAGR of 13.34%, while Black top female management experienced a slightly more significant decline with a CAGR of -14.41%, reflecting challenges in gender and racial equity.

**Graph 54: Broadcasting Black Economic Empowerment Measures, for the 12-month period ending 30<sup>th</sup> September each year.**



Source: ICASA Broadcasters Questionnaire, December 2020 - 2024.

## **6 POSTAL SERVICES SECTOR**

The postal sector has faced numerous challenges in recent years, largely driven by technological advancements and shifting consumer preferences. The rise of digital communication, email, and online shopping has significantly reduced the demand for traditional postal services. Additionally, the increasing reliance on private courier companies has led to intensified parcel competition, making it difficult for public postal services to maintain revenue streams. Moreover, issues such as inefficiencies in delivery networks, and the growing costs of maintaining a large workforce have further strained the sector.

The South African Post Office (SAPO) continues to operate under the supervision of appointed business rescue practitioners as it navigates through ongoing financial challenges. These difficulties have led to the unfortunate closure of several SAPO branches across the country, significantly affecting the availability and accessibility of universal postal services.

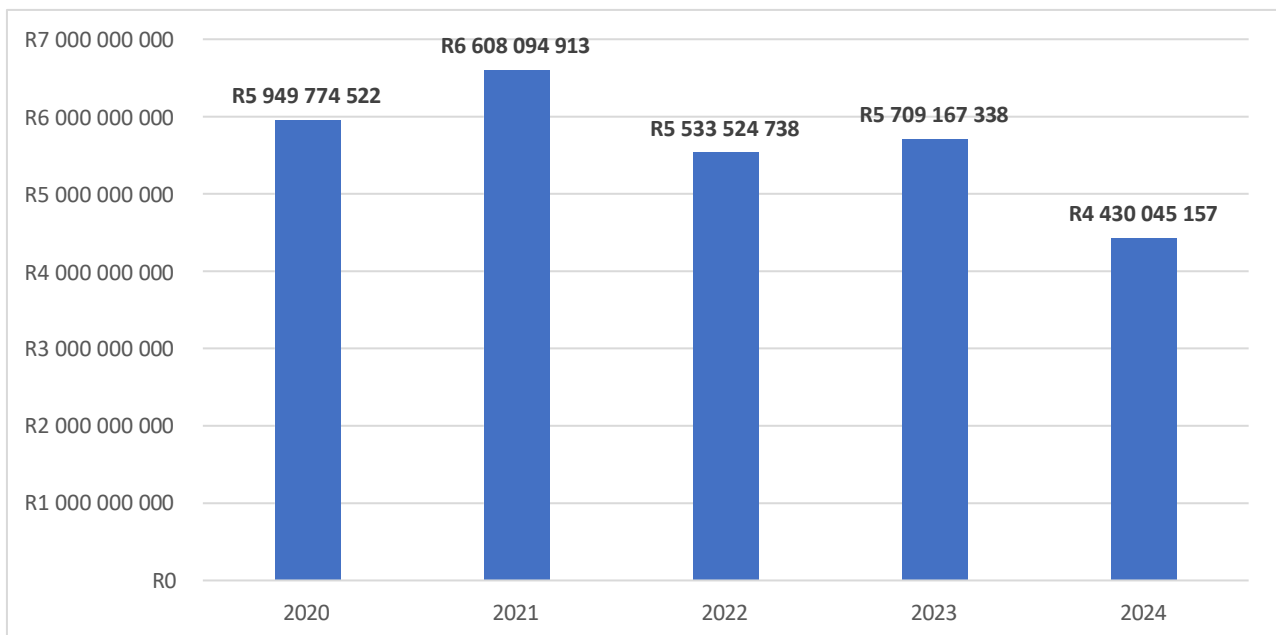
Courier companies have experienced significant growth due to the rise of e-commerce, which has driven the demand for faster, more reliable delivery services. These operators have capitalized on technological advancements, expanding their logistics networks and offering a wide range of services, from same-day deliveries to international shipping. ICASA plays a critical role by regulating the industry, ensuring fair competition, and overseeing the implementation of efficient practices. By setting standards for service quality, and accessibility, ICASA fosters for a conducive environment for both licensed and registered operators to innovate and expand, ensuring that consumer needs are met while maintaining industry stability.

## 6.1 Postal Sector Revenue

Postal services revenue has faced a significant decline, with a 22.40% decrease from 2023 to 2024. This ongoing downward trend highlights the challenges faced by traditional postal services, taking into account the reduced mail volumes as digital communication takes precedence, and competition from more agile couriers. The increasing demand for faster and more efficient parcel delivery, driven by the growth of e-commerce, has also placed pressure on traditional postal services.

Over the past five years, postal services revenue indicated a decreased CAGR of 7.11%, reflecting a consistent decline. In contrast, courier services have seen a strong growth, driven by their ability to offer faster, more reliable, and flexible delivery options, especially in the parcel and logistics segments.

**Graph 55: Postal sector revenue, 12-month period ending 30<sup>th</sup> September each year.**

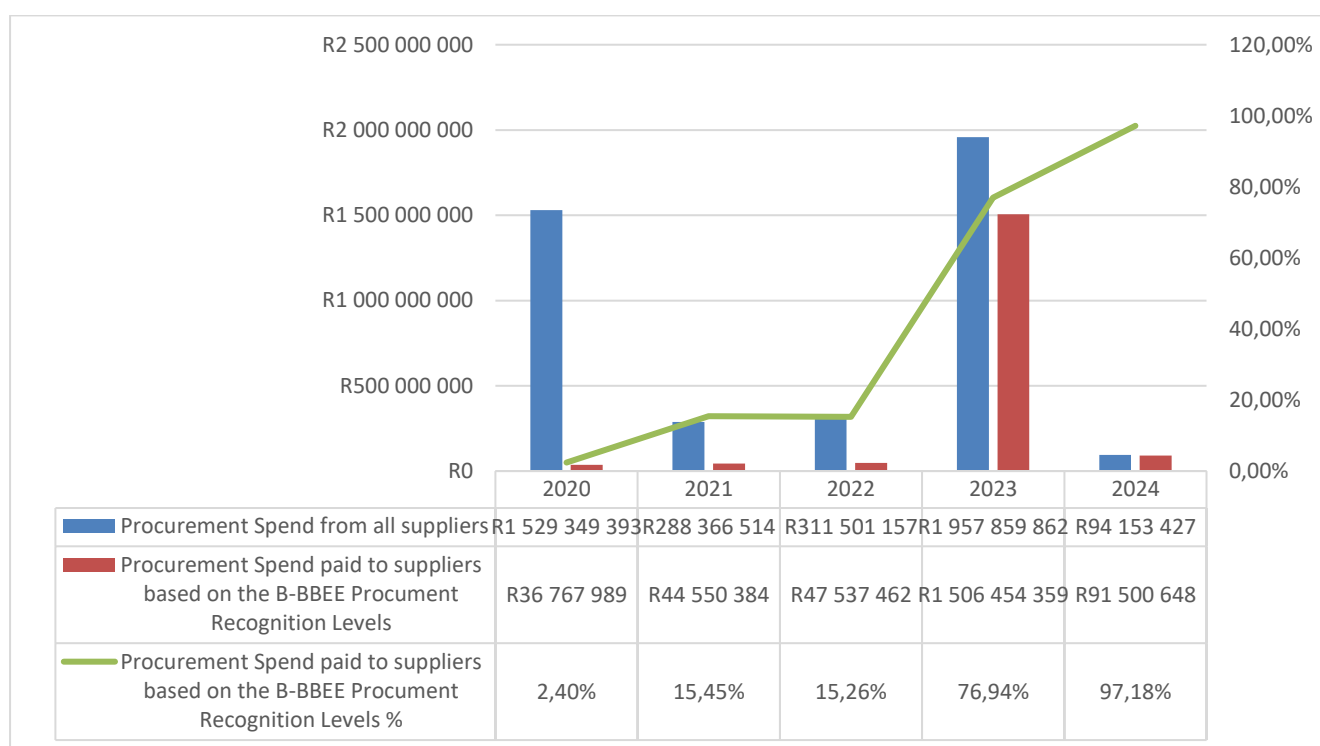


Source: ICASA Postal Questionnaire, December 2020 - 2024  
\*We had low response rate from unreserved postal sector\*

## 6.2 Postal Sector Black Economic Empowerment Measures

In 2023, the portion of total spending allocated to suppliers within the postal sector, determined by their B-BBEE ratings, stood at 76.94%. This allocation witnessed a remarkable increase in 2024, jumping to 97.18%. This shift not only highlights a significant commitment to supporting businesses in the postal sector but also underscores the positive impact of B-BBEE compliance on procurement decisions.

**Graph 56: Postal sector procurement spends to suppliers based on the B-BBEE Procurement Recognition Levels, for the 12-month period ending 30<sup>th</sup> September each year.**



Source: ICASA Postal Questionnaire, December 2020 - 2024

Note: \*we had low response rate from unreserved postal sector\*

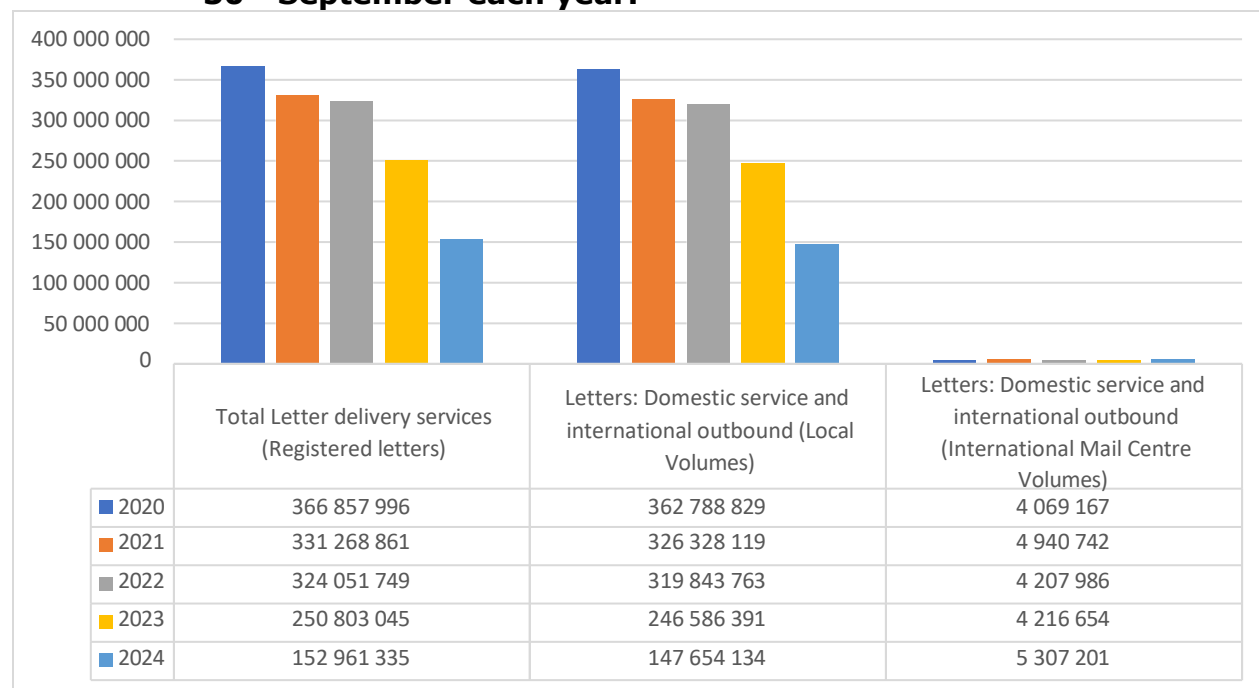


### 6.3 Total Letter delivery services (Registered letters)

The total volume of letter delivery service witnessed a significant decrease, plummeting from 250.8 million pieces in 2023 to just 152.9 million pieces in 2024. This sharp decline can primarily be attributed to a substantial reduction in both domestic and international outbound services, which saw a drop from 246.5 million in 2023 to 147.6 million in 2024, indicating a shift in consumer behaviour and possibly the effects of evolving communication technologies

Over the five-year period, total letter delivery services experienced a negative CAGR of 19.643%. Domestic (local volumes) services saw a decline with a CAGR of 20.13%, while international mail volumes showed modest growth, with a CAGR of 6.87%, reflecting an increase in international delivery.

**Graph 57: Total number of letter delivery services (registered letters), as of 30<sup>th</sup> September each year.**



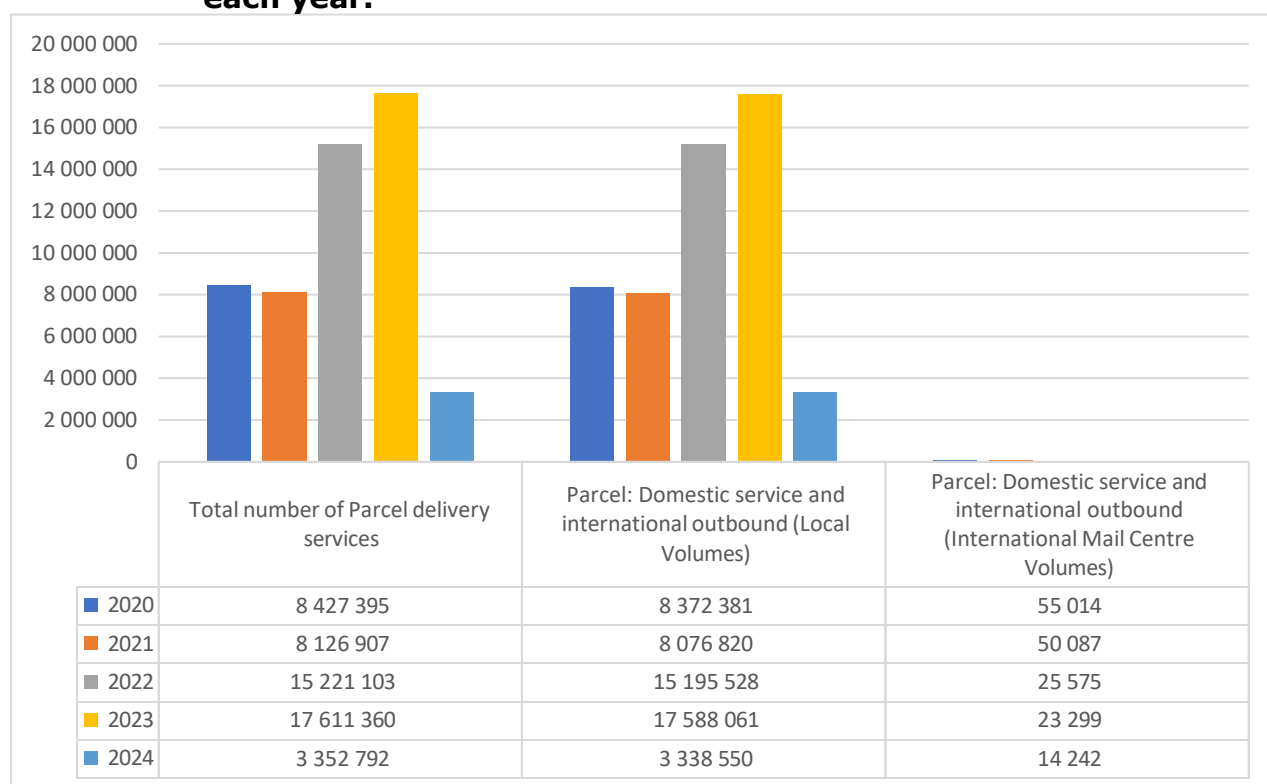
Source: ICASA Postal Questionnaire, December 2020 - 2024

Note: \*we had low response rate from unreserved postal sector\*

## 6.4 Total number of Parcel delivery services

The total number of parcel delivery services experienced a significant decline, dropping from 17.6 million in 2023 to just 3.3 million in 2024. This represents a sharp decrease that raises questions about the factors contributing to such a drastic reduction. Economic shifts, changes in consumer behaviour, and advancements in technology may have played pivotal roles in reshaping the landscape of parcel delivery services during this period.

**Graph 58: Total number of parcel delivery services, as of 30<sup>th</sup> September each year.**



Source: ICASA Postal Questionnaire, December 2020 - 2024

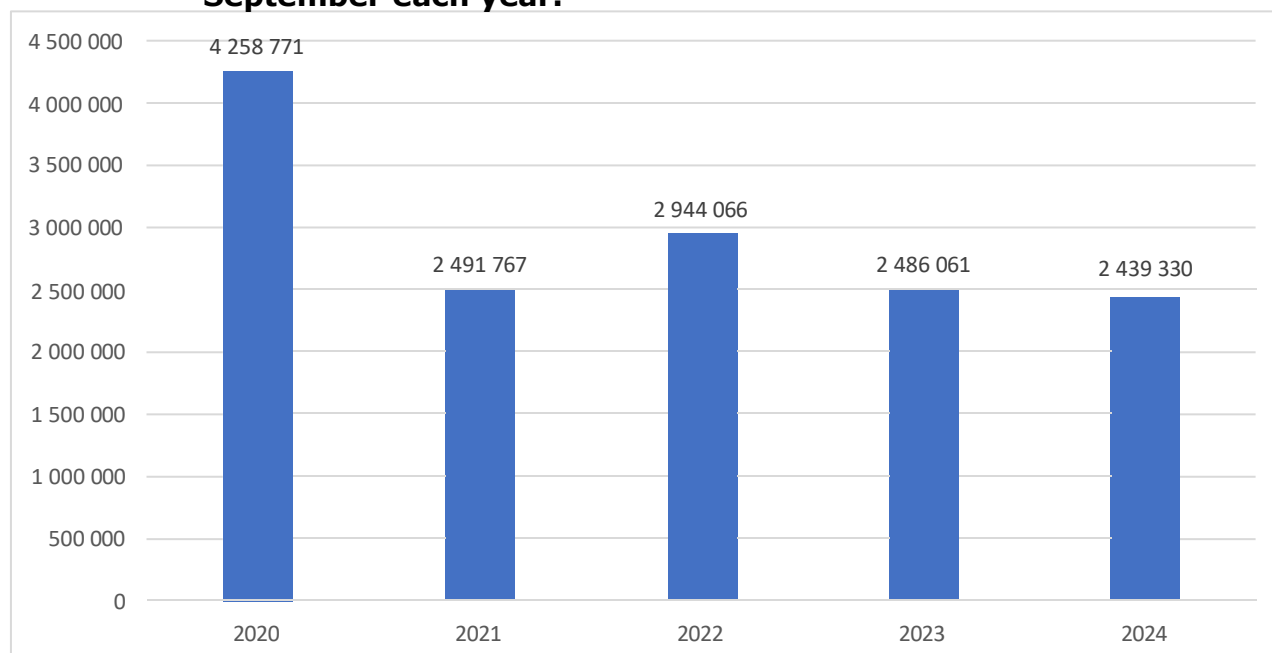
Note: \*we had low response rate from unreserved postal sector\*

## 6.4 Total numbers of Express Delivery Services

Express delivery services (“EMS”) saw a decrease of 1.88% from 2023 to 2024, continuing a downward trend that started in earlier years. This decline reflects the challenges faced by traditional express mail services, including increasing competition from private couriers and the rise of digital alternatives. Domestic service and international outbound volumes dropped as well, showing a decrease in demand for express delivery services, which are being impacted by the growing preference for faster, cost-effective alternatives in logistics. On the other hand, international mail centre volumes saw a significant increase, the international demand remains relatively stable for EMS despite the overall decline in local volumes.

The CAGR for EMS over five years was negative 13%, reflecting a consistent decline in volumes. Domestic and international outbound services also experienced negative growth, while international mail centre volumes showed an uptick, indicating varying demand in different market segments.

**Graph 59: Total number of express delivery services (EMS), as of 30<sup>th</sup> September each year.**



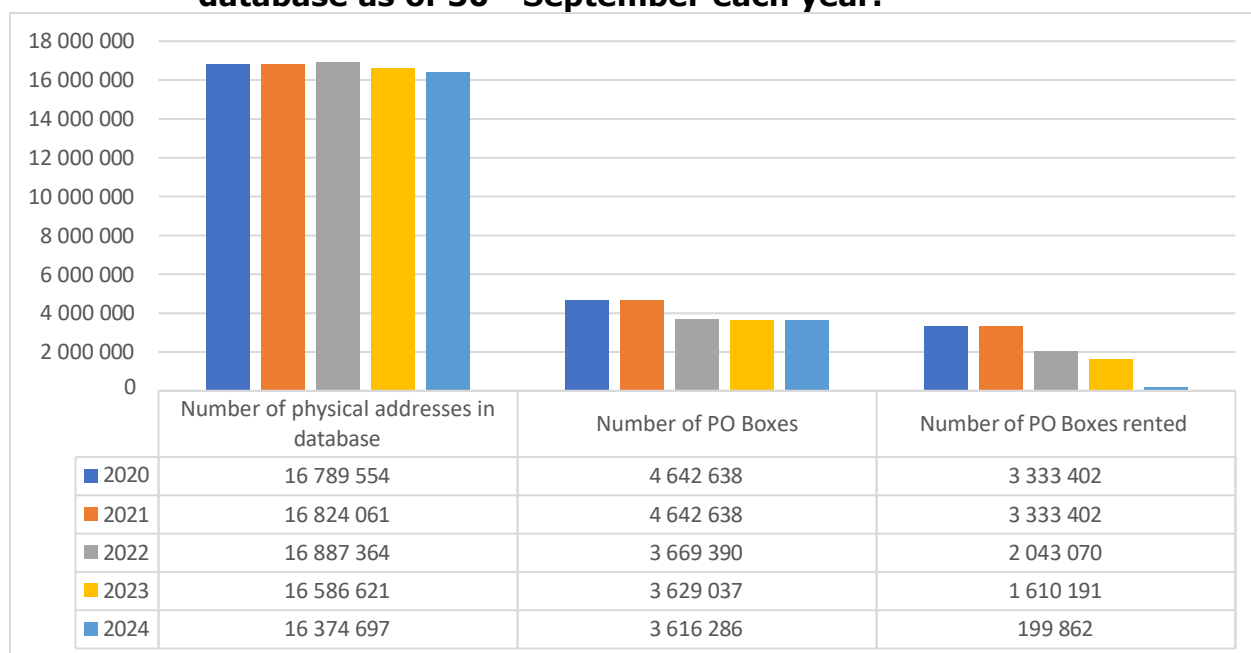
Source: ICASA Postal Questionnaire, December 2020 - 2024

Note: \*we had low response rate from unreserved postal sector\*

## 6.5 Number of PO Boxes, PO Boxes rented, and Physical addresses in database.

In 2024, there was a decline in the number of physical addresses, PO Boxes, and rented PO Boxes recorded in the database. This decrease is attributed to the rising popularity of alternative methods such as email for receiving statements and other communications. The convenience and efficiency of electronic communication have led to a shift away from traditional mail services. As a result, fewer individuals and businesses are relying on physical addresses and PO Boxes for their correspondence needs. This trend reflects a broader transition towards digital solutions in modern communication, marking a significant change in consumer behaviour and preferences.

**Graph 60: Number of PO Boxes, PO Boxes rented, and physical addresses in database as of 30<sup>th</sup> September each year.**



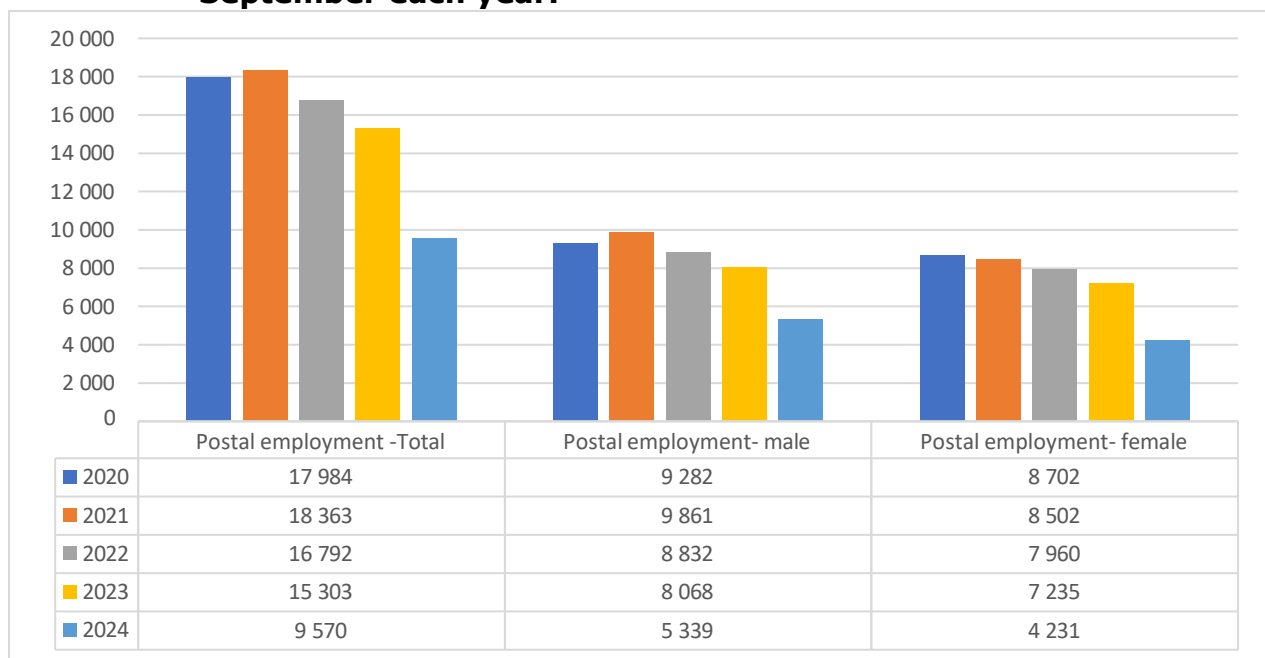
Source: ICASA Postal Questionnaire, December 2020 - 2024

Note: \*we had low response rate from unreserved postal sector\*

## 6.6 Postal Service Sector Employment

In 2023, total postal services sector employment was 15,303, which decreased to 9,570 in 2024, reflecting a shedding of 5,733 jobs. Male postal employment declined from 8,068 in 2023 to 5,339 in 2024, a decrease of 2,729, while female postal employment dropped from 7,235 in 2023 to 4,231 in 2024, reflecting a loss of 3,004 jobs.

**Graph 61: Persons employed in Post Service Sector, by gender, as of 30<sup>th</sup> September each year.**



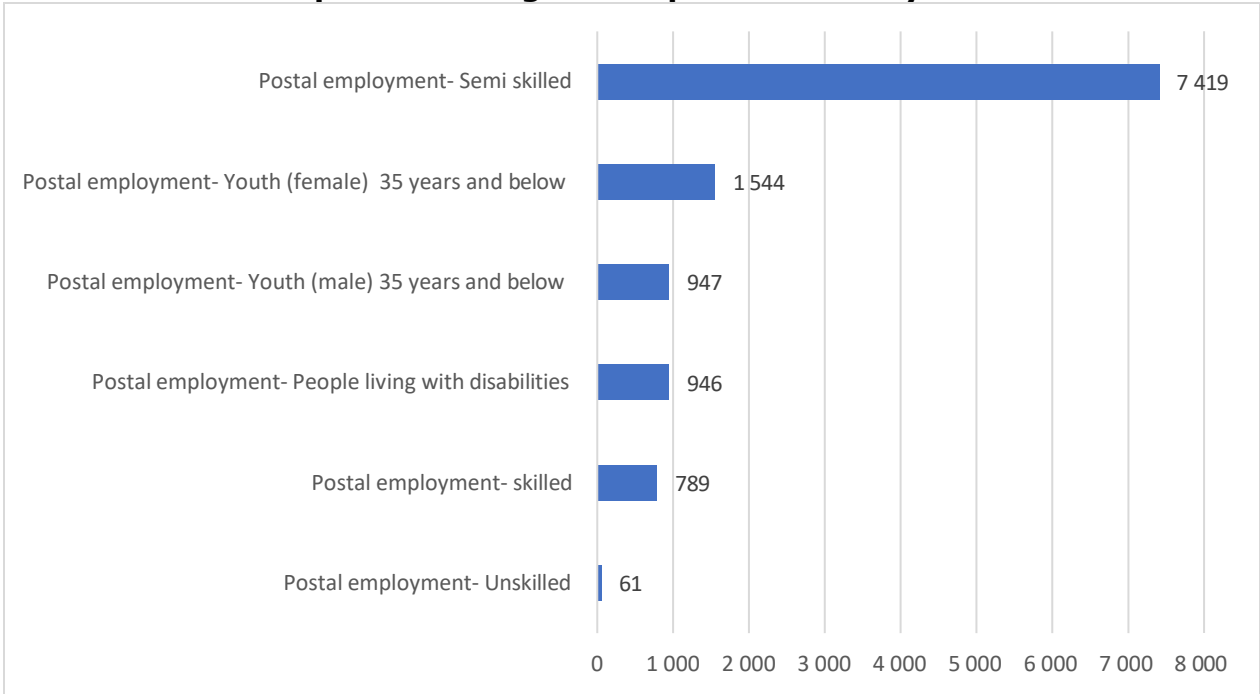
Source: ICASA Postal Questionnaire, December 2020 - 2024

Note: \*we had low response rate from unreserved postal sector\*

### 6.7 Breakdown of Persons Employed in the Postal Sector

In 2024, postal employment figures show a significant distribution across different skill levels and demographics. Unskilled workers held 61 positions, while skilled workers accounted for 789 roles. People living with disabilities made up 946 positions, highlighting the positive trend towards inclusivity. Youth employment is notable, with 947 male youth and 1,544 female youth under 35 years, indicating a focus on providing job opportunities for younger generations. Semi-skilled workers made up a substantial portion of the workforce, with 7,419 positions, suggesting the importance of mid-level expertise within the postal sector. This distribution reflects the sector's efforts toward diverse, inclusive, and multi-skilled workforce development.

**Graph 62: Persons employed in the postal sector breakdown, for the 12-month period ending 30<sup>th</sup> September each year.**

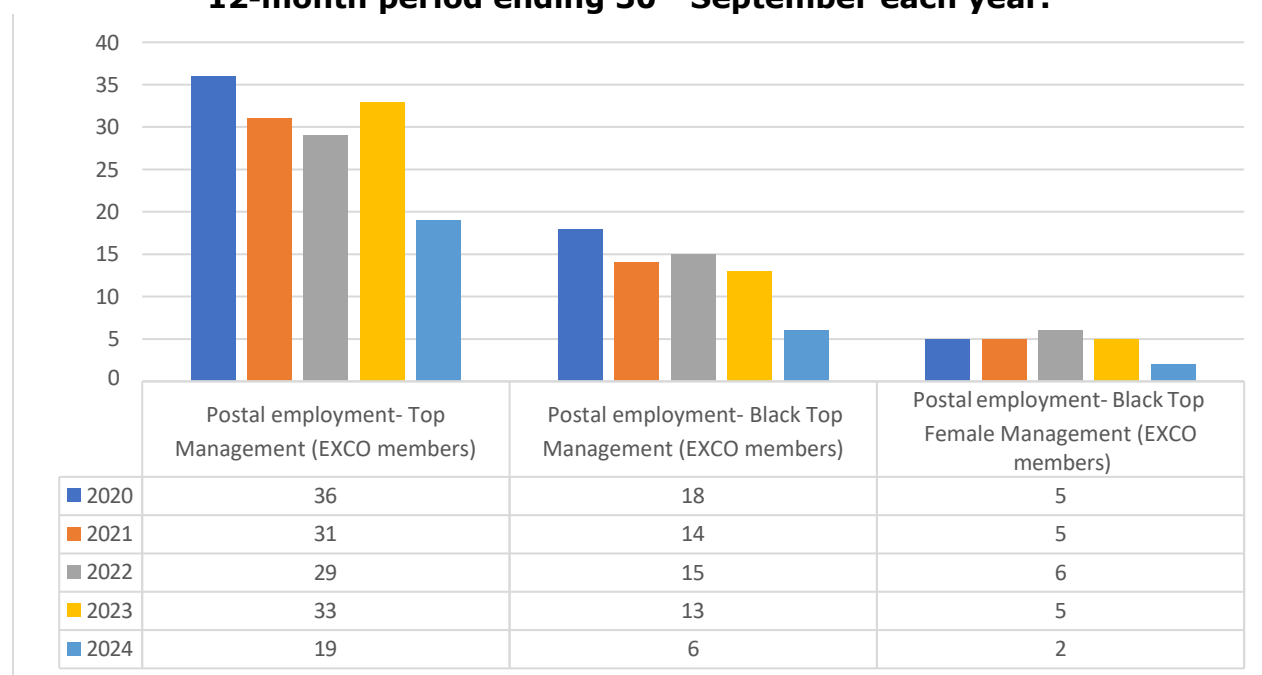


Source: ICASA Postal Questionnaire, December 2024  
Note: \*we had low response rate from unreserved postal sector\*

## 6.8 Postal service sector Black Economic Empowerment Measures

The top management (EXCO members) decreased from 33 in 2023 to 19 in 2024, top black management decreased also from 13 in 2023 to 6 in 2024, whilst the top female black management decreased from 5 in 2023 to 2 in 2024. These changes raise important questions about diversity and representation at the highest levels of management within the postal services organizations.

**Graph 63: Postal sector Black Economic Empowerment Measures, for the 12-month period ending 30<sup>th</sup> September each year.**



Source: ICASA Postal Questionnaire, December 2020 - 2024

Note: \*we had low response rate from unreserved postal sector\*

## 7 CONCLUSION

**The following highlights are worth noting with respect to the telecommunications sector.**

- South Africa's ICT sector is undergoing a digital transformation characterized by rapid growth in mobile services and broadband investments. Household access improvements, with a 3.3% increase in overall internet access (from 75.3% in 2022 to 78.6% in 2023) and significant gains in cellular telephone usage, signal a robust demand for digital connectivity. The telecommunications revenue's increase of 11.70% in 2024 and the strong growth in fixed internet and data revenue (up by 14.62%) underline the sector's dynamic evolution, even as traditional services like fixed-line telephony continue to decline.
- Despite these positive trends, challenges remain in bridging the performance gap with top global markets. The report's findings point to the need for further investments in advanced network technologies, particularly 5G, which currently covers only 46.64% of the population, and in fibre-optic infrastructure to boost fixed broadband speeds. With mobile cellular subscriptions reaching 116.8 million and fixed broadband subscriptions nearly doubling the figure within a year, focused policy measures and strategic partnerships will be essential to enhance network capacity, reduce load-shedding-related backup expenditures, and ultimately improve both fixed and mobile internet speeds. Addressing these areas is crucial for sustaining growth, closing the digital divide, and ensuring South Africa remains competitive in a rapidly evolving global digital landscape.
- Theft and vandalism significantly impaired telecommunications infrastructure in 2024, with losses reaching R69.59 million and R213.83 million, respectively. These criminal activities disrupted service delivery and increased operational challenges. Enhanced security measures are essential to mitigate future risks, ensuring network reliability and effectively supporting sustainable growth in an increasingly digital economy.



- The sector's strategic focus on fibre infrastructure is yielding impressive results, with substantial growth in subscriptions and revenue. This momentum positions the industry to support the evolving digital needs of consumers and businesses alike.
- Improvements in network coverage are laying the groundwork for continued growth. While urban areas are reaping the benefits of advanced technologies like 5G, efforts must continue to ensure rural regions have access to the same opportunities. This comprehensive progress in fibre adoption, digital engagement, and network coverage forms a strong foundation for the sector's future expansion and digital transformation.
- Social media continues to play a pivotal role in driving user engagement and revenue generation for operators. The dominance of key platforms underscores the importance of digital ecosystems in shaping communication in a connected world.

**The following highlights are worth noting with respect to the broadcasting sector.**

- In 2024, the broadcasting sector faced revenue challenges, primarily driven by a declining subscription revenue despite a slight increase in TV subscribers. Pay TV subscriptions showed marginal growth, although the overall trend indicates market pressure from the rising popularity of digital on-demand services. Advertising revenue demonstrated resilience. The sector needs to adapt by enhancing content offerings and exploring innovative subscription models to remain competitive.

- Youth employment continued to show promise, with strong representation in the broadcasting sector. The sector maintained a focus on skilled labour, fostering an environment where emerging talent could contribute meaningfully. However, there is still room to strengthen diversity and leadership opportunities for young professionals.
- The adoption of set-top boxes showed dynamic trends, reflecting the sector's ongoing shift toward digital infrastructure. Despite fluctuations, digital satellite and terrestrial stations recorded growth, underscoring the evolving broadcast landscape in line with consumer preferences and technological advancements.

**The following highlights are worth noting for the postal sector.**

- The postal sector continues to face significant revenue and employment challenges as digital alternatives become more popular. Investments in modern logistics and technological advancements will be crucial for sustaining growth and adapting to shifting consumer preferences. A focused strategy to maintain employment and attract new talent will be essential for future growth.
- Despite declining letter, parcel, and express delivery services, there is potential for growth in international segments. The decreasing reliance on PO Boxes and physical addresses signals a critical need for the sector to reimagine its services and develop more customer-centric, digital-oriented solutions.

## APPENDICES

### Appendix 1: ICASA questionnaire respondents, December 2024

ICASA questionnaire respondents, December, 2024	
Telecommunication's Licensees	
1	Access global Communication (PTY) Ltd
2	Afrihost SP (Pty) Ltd
3	Airpark Beaufort West
4	AMATOLE TELECOMMUNICATIONS SERVICES (PTY) LTD
5	Amobi Communications (Pty) Ltd
6	ASK Internet Technologies CC
7	AT&T South Africa (Proprietary) Limited
8	Axxess DSL
9	Backspace Technology Pty Ltd
10	Bethnet cc
11	Blue Shadow Investments (Pty) Ltd
12	Borwood Communications (Pty) Ltd
13	Borwood Xtech (Pty) Ltd
14	Bosveld Communications
15	Bundu Networx Pty Ltd
16	Cape Connect Internet (Pty) Ltd
17	Carfone OFS (PTY) Ltd
18	Catalytic Connections (Pty) Ltd
19	Cell C Limited
20	China Telecom (Africa and Middle East) Limited
21	Cipherwave Networks (Pty) ltd
22	Compatel Africa
23	Comput8 IT (Pty) Ltd t/a COMPUTATE
24	Consol Networks
25	CRAZYWEB TECH PTY LTD
26	CUBE ICT SOLUTIONS (PTY) LTD
27	Cutman Bush Net
28	CWNET
29	Datonet (Pty) Ltd
30	DavoCorp CC
31	Dimension Data
32	DRB NETWORK SOLUTIONS (PTY) LTD

<b>33</b>	Dube TradePort Corporation
<b>34</b>	E Gate
<b>35</b>	Edelnet
<b>36</b>	Equation Business Solutions
<b>37</b>	Evolution Tel (Pty) Ltd
<b>38</b>	E-Wisp
<b>39</b>	Fibre To The Apartment (Pty)Ltd
<b>40</b>	First Technology Pty Ltd
<b>41</b>	Fixed Mobile Telecommunications (Pty) Ltd
<b>42</b>	Fusion Voice and Data
<b>43</b>	Future Perfect Corporation CC T/A Vanilla
<b>44</b>	Group Lumen South Africa (Pty) Ltd.
<b>45</b>	Hero Telecoms (Pty) Ltd
<b>46</b>	Hollywood Connect (Pty) Ltd
<b>47</b>	Hymax Talking Solutions (Pty) Ltd
<b>48</b>	ICTGlobe Management
<b>49</b>	IECS and IECNS
<b>50</b>	Imply I.T Pty Ltd
<b>51</b>	Infogro PTY LTD
<b>52</b>	InterActive Systems Designs (Pty) Ltd
<b>53</b>	Interexcel World Conenction
<b>54</b>	Internet Uncapped CC
<b>55</b>	Interworks Wireless Solutions
<b>56</b>	IT Square t/a TekConnect
<b>57</b>	IZAK SCHALK WILLEM VAN ZYL
<b>58</b>	KCS Internet Service Provider
<b>59</b>	Kibo Connect (Pty) Ltd
<b>60</b>	Kliq Holdings
<b>61</b>	LaserNet (Pty) Ltd
<b>62</b>	Letaba Networks (Pty) Ltd
<b>63</b>	LIDINO TRADING 534 CC T/A NUWCOM WIRELESS
<b>64</b>	LINK AFRICA (PTY) LTD
<b>65</b>	Linux Based Systems Design SA (Pty) Ltd
<b>66</b>	Liquid Telecommunications South Africa (Pty) Ltd
<b>67</b>	Maziv (Pty) Ltd
<b>68</b>	Metro Fibre
<b>69</b>	MTN (Mobile Telephone Networks)
<b>70</b>	Mweb (Pty) Ltd

<b>71</b>	My WIFI ISP
<b>72</b>	Mzanzi Lisetta Media and Printing (Pty) Ltd
<b>73</b>	Netwide Internet Services
<b>74</b>	NW Internet Service CC
<b>75</b>	Orange Business Services South Africa
<b>76</b>	Platoon Trade and Invest 149 (PTY) LTD TA Wanatel (PTY) LTD
<b>77</b>	Radiospoor (Welkom) Pty Ltd
<b>78</b>	Rain (Pty) Ltd
<b>79</b>	Reunert Limited
<b>80</b>	Saicom Voice Services (Pty) Ltd
<b>81</b>	Sbos
<b>82</b>	SCAN RF Projects (Pty) Ltd
<b>83</b>	Simigenix (Pty) Ltd
<b>84</b>	SKYBER WIFI ENTERPRISES
<b>85</b>	Skynology (PTY)LTD
<b>86</b>	SMS CELLULAR SERVICES PTY LTD
<b>87</b>	SMSPortal
<b>88</b>	Sonic Computers & WiFi
<b>89</b>	Sonic Infracore
<b>90</b>	techCONNECT ISP
<b>91</b>	Technolutions Connected Services Holdings (PTY) LTD
<b>92</b>	Telkom
<b>93</b>	Telviva (Pty) Ltd
<b>94</b>	Think Speed
<b>95</b>	TT CONNECT (PTY) LTD
<b>96</b>	Viva Telecoms CC
<b>97</b>	Vodacom (Pty) Ltd
<b>98</b>	Vox Telecommunications (Pty) Ltd
<b>99</b>	Voys Telecoms SA (Pty) Ltd
<b>100</b>	Wiber Solutions
<b>101</b>	Wispernet (Pty) Ltd
<b>102</b>	Wizard Net
<b>103</b>	Xlink Communications
<b>104</b>	ZA GAS cc
<b>105</b>	Zululand Wireless Network CC
<b>Broadcasting Licensees</b>	
<b>1</b>	Bokone-Bophirima FM
<b>2</b>	BUSH RADIO

<b>3</b>	Deukom (Pty) Ltd.
<b>4</b>	e.tv (Pty) Ltd
<b>5</b>	Faith Broadcasting Terrestrial NPC
<b>6</b>	Fine Music Radio NPC
<b>7</b>	Groot FM
<b>8</b>	Impact Radio
<b>9</b>	Lekoa Multi-Media and Communication DC
<b>10</b>	Life Broadcasting
<b>11</b>	Link FM Trust
<b>12</b>	Modiri FM
<b>13</b>	Multichoice
<b>14</b>	Ngqushwa FM
<b>15</b>	Pretoria FM NPC
<b>16</b>	Primedia Holdings (Pty) Ltd
<b>17</b>	Radio Islam
<b>18</b>	RADIO TYGERBERG 104FM NPC
<b>19</b>	SABC RADIO SERVICES
<b>20</b>	SABC TV SERVICES
<b>21</b>	U MOYA COMMUNICATIONS (PTY) LTD T/A ALGOAFM
<b>22</b>	Univen Community Radio
<b>23</b>	Witzenberg radio (WRFM 105.9)
<b>Postal Services Licensees</b>	
<b>1</b>	Night Wing Couriers
<b>2</b>	Pathteq QPL Logistics (Pty) Ltd
<b>3</b>	South African Post Office
<b>4</b>	Postnet South Africa
<b>5</b>	RC Couriers
<b>6</b>	Royale International
<b>7</b>	The Courier Guy

## Appendix 2: Definitions of Telecommunications categories

<b>Definitions of Telecommunications categories</b>	
ICT	Information Communication Technology
ITU	International Telecommunication Union
SADC	Southern African Development Community
Stats SA	Statistics South Africa
ECS	Electronic Communications Services
ECNS	Electronic Communications Network Services
GHS	General Household Survey
ISP's	Internet Service Providers
<b>Telecommunications sector</b>	
The telecommunications sector comprises fixed and mobile telecommunications services as well as the provision of Internet access.	
<b><i>Total telecommunication investment</i></b>	
Total annual investment in telecommunication services, also referred to as annual capital expenditure, refers to the investment during the financial year in telecommunication services (including fixed, mobile and Internet services) for acquiring or upgrading property and networks. Property includes tangible assets such as plant, intellectual and non-tangible assets such as computer software. The indicator is a measure of investment in telecommunication infrastructure in the country and includes expenditure on initial installations and additions to existing installations where the usage is expected to be over an extended period of time. It excludes expenditure on research and development (R&D), annual fees for operating licences and the use of radio spectrum, and investment in telecommunication software or equipment for internal use.	
<i>Annual investment in fixed-telephone services</i>	
Refers to investment in fixed-telephone services for acquiring and upgrading property and networks within the country. This refers to annual investment in assets related to fixed-telephone networks and the provision of services.	
<i>Annual investment in fixed (wired) broadband services</i>	
Refers to investment in fixed (wired)-broadband services for acquiring and upgrading property and networks within the country. This refers to annual investment in assets related to fixed (wired)-broadband networks and the provision of services.	

<i>Annual investment in mobile communication services</i>
Refers to investment in mobile services for acquiring and upgrading property and networks within the country. It should include investments made for mobile-broadband services. This refers to annual investment in assets related to mobile communication networks and the provision of services. It should include investment in mobile-broadband networks.
<i>Other annual investment in telecommunication services</i>
Refers to investment in other telecommunication services, such as fixed wireless-broadband, satellite and leased lines.
<b>Total telecommunications revenue</b>
The aggregated revenue includes the total telecommunications services revenue and any other revenue.
<b>Total telecommunication services revenue</b>
The sum of revenue from all telecommunication services (in local currency at current prices). Revenue from all telecommunication services refers to revenue earned from retail fixed-telephone, mobile-cellular, Internet and data services offered by telecommunication operators (both network and virtual, including resellers) offering services within the country during the financial year under review. It includes retail revenues earned from the transmission of TV signals but excludes revenues from TV content creation. Exclude: (i) wholesale revenues (e.g. termination rates), (ii) revenues from device sales and rents, (iii) VAT and excise taxes. Any deviation from the definition should be specified in a note, including clarifications on what TV revenues are included/excluded (e.g. IPTV, cable TV, pay satellite and free-to-air TV).
<i>Total fixed line services revenue</i>
This aggregate value is defined as the sum of Fixed line voice revenue, fixed (wired) internet revenue, Other fixed (wireless) broadband revenue and Other fixed telecommunications services revenue as defined below.
<i>Total fixed line voice revenue</i>
Sum of revenue from retail fixed-telephone services refers to revenue received for the connection (installation) of fixed-telephone services, revenue from recurring charges for subscription to the PSTN and revenue from fixed-telephone calls.



<i>Revenue from fixed-telephone connection charges</i>
Revenue from fixed-telephone connection charges refers to retail revenue received for connection (installation) of fixed- telephone services. This may include charges for transfer or cessation of services.
<i>Revenue from fixed-telephone subscription charges</i>
Revenue from fixed-telephone subscription charges refers to revenue from recurring charges for subscriptions to the PSTN, including Internet access if it cannot be separated from fixed-telephone.
<i>Revenue from fixed-telephone calls</i>
Revenue from fixed-telephone calls refers to retail fixed-telephone revenue received from charges for local, national long-distance and international calls.
<b><i>Fixed (wired) internet revenue</i></b>
Revenue from fixed (wired) Internet services refers to retail revenue received from the provision of fixed (wired) Internet services such as subscriptions, traffic and data communication. It excludes the provision of access lines used to connect to fixed (wired) Internet (such as fixed-telephone lines used to access DSL connections). This includes revenue from fixed (wired)-broadband services (previously a separate indicator under ITU code i7311_fb, but for reporting purposes here counted together with any small residual narrowband internet revenue in a single indicator, viz. fixed wired internet).
<b><i>Other (wireless) broadband services revenue</i></b>
Revenue from other wireless-broadband services refers to the retail revenue received from the provision of high-speed (at least 256 Kbit/s) data connectivity and related services over a wireless infrastructure other than mobile cellular, such as satellite or terrestrial fixed wireless broadband infrastructures.
<b><i>Other fixed telecommunication services revenue, including leased lines revenue and fixed value-added telecommunication services</i></b>
Revenue from leased lines refers to retail revenue received from the provision of leased lines.
Revenue from fixed value-added telecommunication services refers to the retail revenue generated by the telecommunication service sector for fixed value-added

telecommunication services, such as call forwarding, itemized billing, conference calls and voice-message services.
Value-added means additional services beyond the basic telephone service line rental and calls
Other telecommunication revenue refers to any other retail telecommunication services revenue received but not accounted for elsewhere.
<b><i>Total mobile services revenue (retail)</i></b>
Revenue from mobile networks refers to retail revenue earned from the provision of mobile-cellular communication services, including all voice, SMS and data (narrowband and broadband) services offered by mobile operators offering services within the country during the financial year under review. Revenues from value added services (e.g. premium SMS) should be included. Data reported should exclude: (i) wholesale revenues (e.g. termination rates), (ii) revenues from device sales and rents, (iii) VAT and excise taxes.
<i>Revenue from mobile voice services</i>
Refers to all mobile-cellular retail revenue from the provision of voice services. It includes voice revenues from national and international calls but excludes revenues from roaming services.
<i>Revenue from outbound mobile cellular roaming</i>
Refers to all mobile-cellular retail roaming revenue from own subscribers roaming abroad. It does not cover foreign mobile subscribers roaming into the country and international calls originating or terminating on the country's mobile networks.
<i>Revenue from mobile data services</i>
Refers to revenue from the provision of non-voice services including messaging (other than SME and MMs), data and Internet services, including M2M/telemetry. It excludes other mobile-cellular services and wireless Internet access services not relating to mobile networks (e.g. satellite or terrestrial fixed wireless technologies).
<i>Revenue from text and multimedia messaging services</i>
Refers to revenue from text messaging and multimedia messaging (SMS and MMS). Some countries may account for this in different ways. For example, some mobile plans include free SMS or MMS that are liable to be classified as voice revenue rather

<p>than mobile-messaging revenue. The treatment of premium messages – where users pay an additional amount over the regular messaging rate – can vary among operators, since they typically share the revenue with a premium-service provider. Operators may also include revenue from international messaging in other categories. The preference is to include all revenue earned by the operator from the provision of messaging services to retail customers.</p>
<p><i>Other mobile services revenue</i></p>
<p>Other mobile services revenue refers to any mobile revenue excluding mobile data services, voice services, text and multimedia messaging services and outbound roaming.</p>
<p><b>Total of any other revenue</b></p>
<p>Sum of interconnection revenue, equipment sale revenue and any other revenue</p>
<p><i>Interconnection revenues</i></p>
<p>Revenues from terminating voice and messaging traffic coming from outside the operator's own network</p>
<p><i>Equipment revenue</i></p>
<p>Revenues from equipment sales</p>
<p><i>Any other revenue</i></p>
<p>Any other revenue which could include wholesale revenues, excluding voice termination (interconnection); IT type services; revenue of a capital nature. E.g. sale of assets or a business.</p>
<p><b>Telecommunications employment</b></p>
<p><i>Persons employed in full-time equivalents</i></p>
<p>Persons employed in full-time equivalents refers to the total number of persons, in full-time equivalent (FTE) units, employed by telecommunication operators in the country for the provision of telecommunication services, including fixed-telephone, mobile-cellular, Internet and data services. This indicator excludes staff working in broadcasting businesses that offer only traditional broadcasting services. Part-time staff should be expressed in terms of full-time staff equivalents (FTE).</p>
<p><i>Telecoms employment- female</i></p>

Persons employed by all telecommunication operators; female should be expressed in terms of full-time staff equivalents.

### ***Telecommunication Subscriptions***

#### ***Fixed-telephone subscriptions***

Fixed-telephone subscriptions refers to the sum of active analogue fixed- telephone lines, voice-over-IP (VoIP) subscriptions, fixed wireless local loop (WLL) subscriptions, ISDN voice-channel equivalents and fixed public payphones. This indicator was previously called Main telephone lines in operation.

#### ***Analogue fixed-telephone lines***

Analogue fixed-telephone lines refer to the number of active lines connecting subscribers' terminal equipment to the PSTN and which have a dedicated port in the telephone-exchange equipment. It includes all post-paid lines and those prepaid lines that have registered an activity in the past three months. This term is synonymous with the terms 'main station' and 'direct exchange line' (DEL) that are commonly used in telecommunication documents.

#### ***VoIP subscriptions***

VoIP subscriptions refers to the number of voice-over-Internet protocol (VoIP) fixed-line subscriptions. It is also known as voice over broadband (VoB), and includes VoIP subscriptions through fixed wireless, DSL, cable, fibre optic and other fixed-broadband Internet platforms that provide fixed telephony using IP. It excludes software-based VoIP applications (e.g. VoIP with Skype using computer-to-computer or computer-to-telephone). Those VoIP subscriptions that do not imply a recurrent monthly fee should only be counted if they have generated inbound or outbound traffic within the past three months.

#### ***Fixed wireless local loop subscriptions***

Fixed wireless local loop (WLL) subscriptions refers to subscriptions provided by licensed fixed-line telephone operators that provide 'last-mile' access to the subscriber using radio technology and where the subscriber's terminal equipment is either stationary or limited in its range of use.

#### ***ISDN voice-channel equivalents***

<p>ISDN voice-channel equivalents refers to the sum of basic-rate and primary-rate voice-channel equivalents (B-channel equivalents). Basic-rate voice-channel equivalents is the number of basic-rate ISDN subscriptions multiplied by 2, and primary-rate voice-channel equivalents is the number of primary-rate ISDN subscriptions multiplied by 23 or 30, depending on the standard implemented.</p>
<p><i>Fixed public payphones</i></p>
<p>Fixed public payphones refers to payphones that are available to the public using the fixed network.</p>
<p><b><i>Mobile cellular subscriptions</i></b></p>
<p>Mobile-cellular telephone subscriptions, by post-paid and prepaid Mobile-cellular telephone subscriptions refers to the number of subscriptions to a public mobile-telephone service that provide access to the PSTN using cellular technology.</p>
<p><i>Prepaid mobile-cellular telephone subscriptions</i></p>
<p>Refers to the total number of mobile-cellular telephone subscriptions that use prepaid refills. These are subscriptions where, instead of paying an ongoing monthly fee, users purchase blocks of usage time. Although the definition of prepaid subscribers from the ITU definition is 3 month active subscribers (those used at least once in the last three months for making or receiving a call or carrying out a non-voice activity such as sending or reading an SMS or accessing the Internet), some South African operators do not have this metric available but rather count SIMs that have not been disconnected within a 90 day window, reporting, implying that the number may be overstated according to the strict definition. The indicator applies to all mobile-cellular subscriptions that offer voice communications. It excludes subscriptions via data cards or USB modems, subscriptions to public mobile data services, private trunked mobile radio, telepoint, radio paging and telemetry services.</p>
<p><i>Post-paid mobile-cellular telephone subscriptions</i></p>
<p>Refers to the total number of mobile-cellular subscriptions, including top up bundles, where subscribers are billed after their use of mobile services, at the end of each month. The post-paid service is provided on the basis of a prior arrangement with a mobile-cellular operator. Typically, the subscriber's contract specifies a limit or allowance of minutes, text messages, etc. The subscriber will be billed at a flat rate</p>

<p>for any usage equal to or less than that allowance. Any usage above that limit incurs extra charges. Theoretically, a subscriber in this situation has no limit on use of mobile services and, as a consequence, unlimited credit. M2M mobile-network subscriptions are included in post-paid subscriptions</p>
<p><i>M2M mobile-network subscriptions</i></p>
<p>M2M subscriptions is a subset of post-paid mobile cellular subscriptions and refers to the number of mobile-cellular machine- to-machine subscriptions that are assigned for use in machines and devices (cars, smart meters, consumer electronics) for the exchange of data between networked devices and are not part of a consumer subscription. For instance, SIM-cards in personal navigation devices, smart meters, trains and automobiles should be included. Mobile dongles and tablet subscriptions should be excluded.</p>
<p><b><i>Internet and data subscriptions</i></b></p>
<p><i>Fixed broadband subscriptions</i></p>
<p>Fixed-broadband subscriptions refers to fixed subscriptions to high-speed access to the public Internet (a TCP/IP connection), at downstream speeds equal to, or greater than, 256 Kbit/s. This includes cable modem, DSL, fibre-to-the- home/building, other fixed (wired)-broadband subscriptions, satellite broadband and terrestrial fixed wireless broadband. This total is measured irrespective of the method of payment. It excludes subscriptions that have access to data communications (including the Internet) via mobile-cellular networks. It should include fixed WiMAX and any other fixed wireless technologies. It includes both residential subscriptions and subscriptions for organizations.</p>
<p><i>DSL Internet subscriptions</i></p>
<p>Refers to the number of Internet subscriptions using digital subscriber line (DSL) services to access the Internet, at downstream speeds greater than or equal to 256 Kbit/s. DSL is a technology for bringing high-bandwidth information to homes and small businesses over ordinary copper telephone lines. It should exclude very high-speed digital subscriber line (VDSL) subscriptions if these are provided using fibre directly to the premises.</p>
<p><i>Fibre-to-the-home/building Internet subscriptions</i></p>

Refers to the number of Internet subscriptions using fibre-to-the-home or fibre-to-the-building, at downstream speeds equal to, or greater than, 256 Kbit/s. This should include subscriptions where fibre goes directly to the subscriber's premises or fibre-to-the-building subscriptions that terminate no more than 2 metres from an external wall of the building. Fibre-to-the-cabinet and fibre-to-the-node are excluded.
<i>Other fixed (wired) broadband subscriptions</i>
Refers to Internet subscriptions using other fixed (wired) broadband technologies to access the Internet (other than DSL, cable modem, and fibre), at downstream speeds equal to, or greater than, 256 Kbit/s. This includes technologies such as ethernet LAN, and broadband-over-powerline (BPL) communications. Ethernet LAN subscriptions refer to subscriptions using IEEE 802.3 technology. BPL subscriptions refer to subscriptions using broadband-over-powerline services. Users of temporary broadband access (e.g. roaming between PWLAN hotspots), users of WiMAX and those with Internet access via mobile-cellular networks are excluded.
<i>Wireless broadband subscriptions</i>
Wireless-broadband subscriptions refers to the sum of satellite broadband, terrestrial fixed wireless broadband and active mobile-broadband subscriptions to the public Internet. The indicator does not cover fixed (wired) broadband or Wi-Fi subscriptions.
<i>Satellite broadband subscriptions</i>
Satellite broadband subscriptions refers to the number of satellite Internet subscriptions with an advertised download speed of at least 256 Kbit/s. It refers to the retail subscription technology and not the backbone technology.
<i>Terrestrial fixed wireless broadband subscriptions</i>
Terrestrial fixed wireless broadband subscriptions refer to the number of terrestrial fixed wireless Internet subscriptions with an advertised download speed of at least 256 Kbit/s. This includes fixed WiMAX and fixed wireless subscriptions but excludes occasional users at hotspots and Wi-Fi hotspot subscribers. It also excludes mobile-broadband subscriptions where users can access a service throughout the country wherever coverage is available."
<i>Mobile data subscriptions</i>

Number of prepaid and post-paid mobile subscriptions that were used to access the Internet the last 3 months, regardless of speed.

<b>Traffic</b>
<i>Fixed line voice traffic</i>
<i>This aggregated value is the sum of Fixed line traffic (i.e. fixed-to-fixed) and all other fixed line originated traffic (Fixed to mobile and international outgoing).</i>
<i>Fixed line traffic</i>
Refers to domestic fixed-to-fixed telephone traffic, in minutes. Domestic fixed-to-fixed telephone traffic refers to completed local and domestic long-distance fixed-telephone voice traffic. The indicator should be reported as the number of minutes of traffic during the reference quarter. This excludes minutes used for dial-up Internet access.
<i>Local fixed-to-fixed telephone traffic, in minutes</i>
Refers to effective (completed) fixed-telephone line voice traffic exchanged within the local charging area in which the calling station is situated. This is the area within which one subscriber can call another on payment of the local charge (if applicable). This is reported in the number of minutes, which should exclude minutes used for dial-up Internet access.
<i>Long-distance fixed-to-fixed telephone traffic, in minutes</i>
Refers to effective (completed) fixed national long-distance telephone voice traffic exchanged with a station outside the local charging area in which the calling station is situated. This is reported as the number of minutes of traffic. It excludes local calls, calls to mobile networks, calls abroad, and calls to special service numbers such as ISPs for Internet dial-up.
<i>Fixed-to-mobile telephone traffic</i>
Refers to total traffic from all fixed-telephone networks to all mobile-cellular networks within the country.
<i>International incoming and outgoing fixed-telephone traffic</i>
Refers to the sum of international incoming and outgoing fixed-telephone voice traffic.
<i>International outgoing fixed-telephone traffic, in minutes</i>



Refers to effective (completed) fixed-telephone voice traffic originating in a given country to destinations outside that country. This should include traffic to mobile phones outside the country. This is reported in number of minutes of traffic. It excludes calls originating in other countries. It should include VoIP traffic.
<i>International incoming fixed-telephone traffic, in minutes</i>
Refers to effective (completed) fixed-telephone voice traffic originating outside the country with a destination inside the country, irrespective of whether the call was from a fixed or mobile subscriber. It excludes minutes of calls terminating in other countries, but includes VoIP traffic
<i>Mobile voice traffic</i>
<i>This aggregated value is the sum of Total national mobile traffic, as defined below, and international outgoing from mobile.</i>
<i>Total national mobile traffic</i>
Domestic mobile-telephone traffic refers to the total number of minutes of calls made by mobile subscribers within a country (including minutes to fixed-telephone and minutes to mobile-phone subscribers).
<i>Outgoing mobile traffic to same mobile network</i>
Refers to the number of minutes of calls made by mobile subscribers to the same mobile network (within the country). This refers to the number of minutes originating on mobile networks and terminating on the same mobile network (on-net). It does not cover minutes of calls from mobile to fixed or mobile to other mobile networks.
<i>Mobile to other mobile networks</i>
Outgoing mobile traffic to other mobile networks, in minutes refers to the number of minutes of calls made by mobile subscribers to other mobile networks (within the country). The indicator refers to the number of minutes originating on mobile networks and terminating on different domestic mobile networks (off-net). It does not cover minutes of calls from mobile to fixed or mobile to the same mobile networks.
<i>Outgoing mobile traffic to fixed networks</i>
Refers to the number of minutes of calls made from mobile-cellular networks to fixed-line telephone networks within the country. The indicator refers to the number of

minutes originating on mobile networks and terminating on fixed-line telephone networks within the country.
<i>International outgoing from mobile</i>
Outgoing mobile traffic to international refers to the number of mobile minutes originating in a country to any destinations outside that country.
<i>Incoming international traffic to mobile network</i>
Refers to the number of incoming minutes (fixed and mobile) received by mobile networks originating in another country.
<i>Mobile data traffic</i>
Mobile data traffic (within the country) refers to data traffic originated within the country from mobile networks. Download and upload traffic should be added up and reported together. Traffic should be measured at the end-user access point. Wholesale and walled-garden traffic should be excluded. The traffic should be reported in terabytes.
<i>SMS traffic</i>
SMS sent refers to the total number of mobile short-message service (SMS) messages sent, both to national and international destinations. This should exclude messages sent from computers to mobile handsets or to other computers.
<i>SMS international traffic</i>
SMS international refers to the total number of mobile short-message service (SMS) messages sent to international destinations. This should exclude messages sent from computers to mobile handsets or to other computers.
<b>Population coverage</b>
<i>3G population coverage</i>
Percentage of the population covered by at a 3G mobile network refers to the percentage of inhabitants that are within range of a 3G mobile-cellular signal, irrespective of whether or not they are subscribers. This is calculated by dividing the number of inhabitants that are covered by a 3G mobile-cellular signal by the total population and multiplying by 100.
<i>4G/LTE etc. population coverage</i>

Percentage of the population covered by a 4G/LTE mobile network refers to the percentage of inhabitants that are within range of a 4G/LTE mobile-cellular signal, irrespective of whether or not they are subscribers. This is calculated by dividing the number of inhabitants that are covered by a 4G/LTE mobile-cellular signal by the total population and multiplying by 100. Note that all LTE variants are included.
<b>Internet bandwidth</b>
<b>International Internet bandwidth</b>
<i>International outgoing Internet bandwidth</i>
Refers to the total outgoing used capacity of international Internet bandwidth, in Mbit/s. This is measured as the sum of outgoing (uplink) capacity of all Internet exchanges offering international bandwidth.
<i>International incoming Internet bandwidth</i>
<i>Refers to the total incoming used capacity of international Internet bandwidth, in Mbit/s. This is measured as the sum of incoming (downlink) capacity of all Internet exchanges offering international bandwidth.</i>
<i>Smartphone subscriptions</i>
A smartphone is a mobile phone with advanced features: it has Wi-Fi connectivity, web browsing, capabilities, a high-resolution touchscreen display and the ability to use apps. The majority use one of the following mobile operating systems: Android, Symbian, iOS, Blackberry OS and Windows Mobile.
<b>Fixed post-paid local telephone services prices</b>
<i>Installation fee for residential telephone service</i>
Installation fee for residential telephone service refers to the one-off charge involved in applying for a basic residential post-paid fixed-telephone service. Taxes should be included. If not included, it should be specified in a note including the applicable tax rate.
<i>Monthly subscription for residential telephone service</i>
Monthly subscription for residential telephone service refers to the recurring fixed charge for subscribing to a residential post-paid fixed-telephone service. The charge should cover the rental of the line but not the rental of the terminal (e.g. telephone set). If the rental charge includes any allowance for free or reduced rate call units,

<p>this should be indicated in the note. Taxes should be included. If not included, it should be specified in a note including the applicable tax rate.</p>
<p><i>Price of a three-minute local call to a fixed-telephone line, peak rate</i></p>
<p>Price of a three-minute local call (peak-rate) to a fixed-telephone line refers to the price of a three-minute peak local call from a residential fixed-telephone line, including any call set-up charges, within the same exchange area using the subscriber's own terminal (i.e. not from a public telephone). Taxes should be included. If not included, it should be specified in a note including the applicable tax rate.</p>
<p><i>Price of a three-minute local call to a fixed-telephone line, off-peak rate</i></p>
<p>Price of a three-minute local call to a fixed-telephone line refers to the price of a three-minute off-peak local call from a residential fixed-telephone line, including any call set-up charges, within the same exchange area using the subscriber's own terminal (i.e. not from a public telephone). Taxes should be included. If not included, it should be specified in a note including the applicable tax rate.</p>
<p><b>Mobile-cellular prepaid prices</b></p>
<p><i>Mobile-cellular prepaid-price of a one-minute local call (peak, on-net)</i></p>
<p>Refers to the price per minute of a peak prepaid call from a mobile-cellular telephone with a prepaid subscription to another subscriber in the same network. Taxes should be included. If not included, it should be specified in a note including the applicable tax rate.</p>
<p><i>Mobile-cellular prepaid-price of a one-minute local call (off-peak, on-net)</i></p>
<p>Refers to the price per minute of a prepaid call from a mobile-cellular telephone with a prepaid subscription made to the same mobile-cellular network during off-peak time. Off-peak refers to the cheapest rate before mid-night. If the only off-peak period is after mid-night, the peak price should be used. Taxes should be included. If not included, it should be specified in a note including the applicable tax rate.</p>
<p><i>Mobile-cellular prepaid-price of SMS (on-net)</i></p>
<p>Mobile-cellular prepaid – price of SMS refers to the price of sending a short-message service (SMS) message from a mobile-cellular telephone with a prepaid subscription to a mobile-cellular number of the same network (on-net). Taxes should be included. If not included, it should be specified in a note including the applicable tax rate.</p>

<b>ICT Sector Black Economic Empowerment Measures</b>
<i>Telecoms employment -Black Top Management</i>
Persons employed by all telecommunication operators, Black Top Management, should be expressed in terms of full-time staff equivalents. This should include Exco and other Executives.
<i>Procurement Spend to all suppliers</i>
Total spend on all goods and services procured by an Entity.
<i>Procurement Spend to all suppliers based on the B-BBEE Procurement Recognition Levels</i>
Total spend on all goods and services procured by an Entity based on the B-BBEE Procurement Recognition Levels.
<i>Number of Schools connected based on obligations imposed by ICASA</i>
Total number of Schools connected based on obligations imposed by ICASA to operators.

<i>Total fixed line voice revenue</i>
Sum of revenue from retail fixed-telephone services refers to revenue received for the connection (installation) of fixed-telephone services, revenue from recurring charges for subscription to the PSTN and revenue from fixed-telephone calls.
<i>Revenue from fixed-telephone connection charges</i>
Revenue from fixed-telephone connection charges refers to retail revenue received for connection (installation) of fixed- telephone services. This may include charges for transfer or cessation of services.
<i>Revenue from fixed-telephone subscription charges</i>
Revenue from fixed-telephone subscription charges refers to revenue from recurring charges for subscriptions to the PSTN, including Internet access if it cannot be separated from fixed-telephone.
<i>Revenue from fixed-telephone calls</i>
Revenue from fixed-telephone calls refers to retail fixed-telephone revenue received from charges for local, national long-distance and international calls.
<b>Fixed (wired) internet revenue</b>

<p>Revenue from fixed (wired) Internet services refers to retail revenue received from the provision of fixed (wired) Internet services such as subscriptions, traffic and data communication. It excludes the provision of access lines used to connect to fixed (wired) Internet (such as fixed-telephone lines used to access DSL connections). This includes revenue from fixed (wired)-broadband services (previously a separate indicator under ITU code i7311_fb, but for reporting purposes here counted together with any small residual narrowband internet revenue in a single indicator, viz. fixed wired internet).</p>
<p><b><i>Other (wireless) broadband services revenue</i></b></p>
<p>Revenue from other wireless-broadband services refers to the retail revenue received from the provision of high-speed (at least 256 Kbit/s) data connectivity and related services over a wireless infrastructure other than mobile cellular, such as satellite or terrestrial fixed wireless broadband infrastructures.</p>
<p><b><i>Other fixed telecommunication services revenue, including leased lines revenue and fixed value-added telecommunication services</i></b></p>
<p>Revenue from leased lines refers to retail revenue received from the provision of leased lines.</p>
<p>Revenue from fixed value-added telecommunication services refers to the retail revenue generated by the telecommunication service sector for fixed value-added telecommunication services, such as call forwarding, itemized billing, conference calls and voice-message services.</p>
<p>Value-added means additional services beyond the basic telephone service line rental and calls</p>
<p>Other telecommunication revenue refers to any other retail telecommunication services revenue received but not accounted for elsewhere.</p>
<p><b><i>Total mobile services revenue (retail)</i></b></p>
<p>Revenue from mobile networks refers to retail revenue earned from the provision of mobile-cellular communication services, including all voice, SMS and data (narrowband and broadband) services offered by mobile operators offering services within the country during the financial year under review. Revenues from value added services (e.g. premium SMS) should be included. Data reported should exclude: (i)</p>

wholesale revenues (e.g. termination rates), (ii) revenues from device sales and rents, (iii) VAT and excise taxes.
<i>Revenue from mobile voice services</i>
Refers to all mobile-cellular retail revenue from the provision of voice services. It includes voice revenues from national and international calls but excludes revenues from roaming services.
<i>Revenue from outbound mobile cellular roaming</i>
Refers to all mobile-cellular retail roaming revenue from own subscribers roaming abroad. It does not cover foreign mobile subscribers roaming into the country and international calls originating or terminating on the country's mobile networks.
<i>Revenue from mobile data services</i>
Refers to revenue from the provision of non-voice services including messaging (other than SME and MMs), data and Internet services, including M2M/telemetry. It excludes other mobile-cellular services and wireless Internet access services not relating to mobile networks (e.g. satellite or terrestrial fixed wireless technologies).
<i>Revenue from text and multimedia messaging services</i>
Refers to revenue from text messaging and multimedia messaging (SMS and MMS). Some countries may account for this in different ways. For example, some mobile plans include free SMS or MMS that are liable to be classified as voice revenue rather than mobile-messaging revenue. The treatment of premium messages – where users pay an additional amount over the regular messaging rate – can vary among operators, since they typically share the revenue with a premium-service provider. Operators may also include revenue from international messaging in other categories. The preference is to include all revenue earned by the operator from the provision of messaging services to retail customers.
<b>Total of any other revenue</b>
Sum of interconnection revenue, equipment sale revenue and any other revenue
<i>Interconnection revenues</i>
Revenues from terminating voice and messaging traffic coming from outside the operator's own network

<i>Equipment revenue</i>
Revenues from equipment sales
<i>Any other revenue</i>
Any other revenue which could include wholesale revenues, excluding voice termination (interconnection); IT type services; revenue of a capital nature. E.g. sale of assets or a business.
<b><i>Telecommunications employment</i></b>
<i>Persons employed in full-time equivalents</i>
Persons employed in full-time equivalents refers to the total number of persons, in full-time equivalent (FTE) units, employed by telecommunication operators in the country for the provision of telecommunication services, including fixed-telephone, mobile-cellular, Internet and data services. This indicator excludes staff working in broadcasting businesses that offer only traditional broadcasting services. Part-time staff should be expressed in terms of full-time staff equivalents (FTE).
<i>Telecoms employment- female</i>
Persons employed by all telecommunication operators; female should be expressed in terms of full-time staff equivalents.
<b><i>Telecommunication Subscriptions</i></b>
<b><i>Fixed-telephone subscriptions</i></b>
Fixed-telephone subscriptions refers to the sum of active analogue fixed- telephone lines, voice-over-IP (VoIP) subscriptions, fixed wireless local loop (WLL) subscriptions, ISDN voice-channel equivalents and fixed public payphones. This indicator was previously called Main telephone lines in operation.
<i>Analogue fixed-telephone lines</i>
Analogue fixed-telephone lines refer to the number of active lines connecting subscribers' terminal equipment to the PSTN, and which have a dedicated port in the telephone-exchange equipment. It includes all post-paid lines and those prepaid lines that have registered an activity in the past three months. This term is synonymous with the terms 'main station' and 'direct exchange line' (DEL) that are commonly used in telecommunication documents.
<i>VoIP subscriptions</i>



VoIP subscriptions refers to the number of voice-over-Internet protocol (VoIP) fixed-line subscriptions. It is also known as voice over broadband (VoB), and includes VoIP subscriptions through fixed wireless, DSL, cable, fibre optic and other fixed-broadband Internet platforms that provide fixed telephony using IP. It excludes software-based VoIP applications (e.g. VoIP with Skype using computer-to-computer or computer-to-telephone). Those VoIP subscriptions that do not imply a recurrent monthly fee should only be counted if they have generated inbound or outbound traffic within the past three months.
<i>Fixed wireless local loop subscriptions</i>
Fixed wireless local loop (WLL) subscriptions refers to subscriptions provided by licensed fixed-line telephone operators that provide 'last-mile' access to the subscriber using radio technology and where the subscriber's terminal equipment is either stationary or limited in its range of use.
<i>ISDN voice-channel equivalents</i>
ISDN voice-channel equivalents refers to the sum of basic-rate and primary-rate voice-channel equivalents (B-channel equivalents). Basic-rate voice-channel equivalents is the number of basic-rate ISDN subscriptions multiplied by 2, and primary-rate voice-channel equivalents is the number of primary-rate ISDN subscriptions multiplied by 23 or 30, depending on the standard implemented.
<i>Fixed public payphones</i>
Fixed public payphones refers to payphones that are available to the public using the fixed network.
<b><i>Mobile cellular subscriptions</i></b>
Mobile-cellular telephone subscriptions, by post-paid and prepaid Mobile-cellular telephone subscriptions refers to the number of subscriptions to a public mobile-telephone service that provide access to the PSTN using cellular technology.
<i>Prepaid mobile-cellular telephone subscriptions</i>
Refers to the total number of mobile-cellular telephone subscriptions that use prepaid refills. These are subscriptions where, instead of paying an ongoing monthly fee, users purchase blocks of usage time. Although the definition of prepaid subscribers from the ITU definition is 3 month active subscribers (those used at

least once in the last three months for making or receiving a call or carrying out a non-voice activity such as sending or reading an SMS or accessing the Internet), some South African operators do not have this metric available but rather count SIMs that have not been disconnected within a 90 day window, reporting, implying that the number may be overstated according to the strict definition. The indicator applies to all mobile-cellular subscriptions that offer voice communications. It excludes subscriptions via data cards or USB modems, subscriptions to public mobile data services, private trunked mobile radio, telepoint, radio paging and telemetry services.

*Post-paid mobile-cellular telephone subscriptions*

Refers to the total number of mobile-cellular subscriptions, including top up bundles, where subscribers are billed after their use of mobile services, at the end of each month. The post-paid service is provided on the basis of a prior arrangement with a mobile- cellular operator. Typically, the subscriber’s contract specifies a limit or allowance of minutes, text messages, etc. The subscriber will be billed at a flat rate for any usage equal to or less than that allowance. Any usage above that limit incurs extra charges. Theoretically, a subscriber in this situation has no limit on use of mobile services and, as a consequence, unlimited credit. M2M mobile-network subscriptions are included in post-paid subscriptions

*M2M mobile-network subscriptions*

M2M subscriptions is a subset of post-paid mobile cellular subscriptions and refers to the number of mobile-cellular machine- to-machine subscriptions that are assigned for use in machines and devices (cars, smart meters, consumer electronics) for the exchange of data between networked devices and are not part of a consumer subscription. For instance, SIM-cards in personal navigation devices, smart meters, trains and automobiles should be included. Mobile dongles and tablet subscriptions should be excluded.

**Internet and data subscriptions**

*Fixed broadband subscriptions*

Fixed-broadband subscriptions refers to fixed subscriptions to high-speed access to the public Internet (a TCP/IP connection), at downstream speeds equal to, or

greater than, 256 Kbit/s. This includes cable modem, DSL, fibre-to-the-home/building, other fixed (wired)-broadband subscriptions, satellite broadband and terrestrial fixed wireless broadband. This total is measured irrespective of the method of payment. It excludes subscriptions that have access to data communications (including the Internet) via mobile-cellular networks. It should include fixed WiMAX and any other fixed wireless technologies. It includes both residential subscriptions and subscriptions for organizations.

*DSL Internet subscriptions*

Refers to the number of Internet subscriptions using digital subscriber line (DSL) services to access the Internet, at downstream speeds greater than or equal to 256 Kbit/s. DSL is a technology for bringing high-bandwidth information to homes and small businesses over ordinary copper telephone lines. It should exclude very high-speed digital subscriber line (VDSL) subscriptions if these are provided using fibre directly to the premises.

*Fibre-to-the-home/building Internet subscriptions*

Refers to the number of Internet subscriptions using fibre-to-the-home or fibre-to-the-building, at downstream speeds equal to, or greater than, 256 Kbit/s. This should include subscriptions where fibre goes directly to the subscriber's premises or fibre-to-the-building subscriptions that terminate no more than 2 metres from an external wall of the building. Fibre-to-the-cabinet and fibre-to-the-node are excluded.

*Other fixed (wired) broadband subscriptions*

Refers to Internet subscriptions using other fixed (wired) broadband technologies to access the Internet (other than DSL, cable modem, and fibre), at downstream speeds equal to, or greater than, 256 Kbit/s. This includes technologies such as ethernet LAN, and broadband-over-powerline (BPL) communications. Ethernet LAN subscriptions refer to subscriptions using IEEE 802.3 technology. BPL subscriptions refer to subscriptions using broadband-over-powerline services. Users of temporary broadband access (e.g. roaming between PWLAN hotspots), users of WiMAX and those with Internet access via mobile-cellular networks are excluded.

*Wireless broadband subscriptions*

Wireless-broadband subscriptions refers to the sum of satellite broadband, terrestrial fixed wireless broadband, and active mobile-broadband subscriptions to the public Internet. The indicator does not cover fixed (wired) broadband or Wi-Fi subscriptions.
<i>Satellite broadband subscriptions</i>
Satellite broadband subscriptions refers to the number of satellite Internet subscriptions with an advertised download speed of at least 256 Kbit/s. It refers to the retail subscription technology and not the backbone technology.
<i>Terrestrial fixed wireless broadband subscriptions</i>
Terrestrial fixed wireless broadband subscriptions refer to the number of terrestrial fixed wireless Internet subscriptions with an advertised download speed of at least 256 Kbit/s. This includes fixed WiMAX and fixed wireless subscriptions but excludes occasional users at hotspots and Wi-Fi hotspot subscribers. It also excludes mobile-broadband subscriptions where users can access a service throughout the country wherever coverage is available."
<i>Mobile data subscriptions</i>
Number of prepaid and post-paid mobile subscriptions that were used to access the Internet the last 3 months, regardless of speed.

<b>Traffic</b>
<i>Fixed line voice traffic</i>
<i>This aggregated value is the sum of Fixed line traffic (i.e. fixed-to-fixed) and all other fixed line originated traffic (Fixed to mobile and international outgoing).</i>
<i>Fixed line traffic</i>
Refers to domestic fixed-to-fixed telephone traffic, in minutes. Domestic fixed-to-fixed telephone traffic refers to completed local and domestic long-distance fixed-telephone voice traffic. The indicator should be reported as the number of minutes of traffic during the reference quarter. This excludes minutes used for dial-up Internet access.
<i>Local fixed-to-fixed telephone traffic, in minutes</i>

Refers to effective (completed) fixed-telephone line voice traffic exchanged within the local charging area in which the calling station is situated. This is the area within which one subscriber can call another on payment of the local charge (if applicable). This is reported in the number of minutes, which should exclude minutes used for dial-up Internet access.
<i>Long-distance fixed-to-fixed telephone traffic, in minutes</i>
Refers to effective (completed) fixed national long-distance telephone voice traffic exchanged with a station outside the local charging area in which the calling station is situated. This is reported as the number of minutes of traffic. It excludes local calls, calls to mobile networks, calls abroad, and calls to special service numbers such as ISPs for Internet dial-up.
<i>Fixed-to-mobile telephone traffic</i>
Refers to total traffic from all fixed-telephone networks to all mobile-cellular networks within the country.
<i>International incoming and outgoing fixed-telephone traffic</i>
Refers to the sum of international incoming and outgoing fixed-telephone voice traffic.
<i>International outgoing fixed-telephone traffic, in minutes</i>
Refers to effective (completed) fixed-telephone voice traffic originating in a given country to destinations outside that country. This should include traffic to mobile phones outside the country. This is reported in number of minutes of traffic. It excludes calls originating in other countries. It should include VoIP traffic.
<i>International incoming fixed-telephone traffic, in minutes</i>
Refers to effective (completed) fixed-telephone voice traffic originating outside the country with a destination inside the country, irrespective of whether the call was from a fixed or mobile subscriber. It excludes minutes of calls terminating in other countries, but includes VoIP traffic
<i>Mobile voice traffic</i>
<i>This aggregated value is the sum of Total national mobile traffic, as defined below, and international outgoing from mobile.</i>
<i>Total national mobile traffic</i>

Domestic mobile-telephone traffic refers to the total number of minutes of calls made by mobile subscribers within a country (including minutes to fixed-telephone and minutes to mobile-phone subscribers).
<i>Outgoing mobile traffic to same mobile network</i>
Refers to the number of minutes of calls made by mobile subscribers to the same mobile network (within the country). This refers to the number of minutes originating on mobile networks and terminating on the same mobile network (on-net). It does not cover minutes of calls from mobile to fixed or mobile to other mobile networks.
<i>Mobile to other mobile networks</i>
Outgoing mobile traffic to other mobile networks, in minutes refers to the number of minutes of calls made by mobile subscribers to other mobile networks (within the country). The indicator refers to the number of minutes originating on mobile networks and terminating on different domestic mobile networks (off-net). It does not cover minutes of calls from mobile to fixed or mobile to the same mobile networks.
<i>Outgoing mobile traffic to fixed networks</i>
Refers to the number of minutes of calls made from mobile-cellular networks to fixed-line telephone networks within the country. The indicator refers to the number of minutes originating on mobile networks and terminating on fixed-line telephone networks within the country.
<i>International outgoing from mobile</i>
Outgoing mobile traffic to international refers to the number of mobile minutes originating in a country to any destinations outside that country.
<i>Incoming international traffic to mobile network</i>
Refers to the number of incoming minutes (fixed and mobile) received by mobile networks originating in another country.
<i>Mobile data traffic</i>
Mobile data traffic (within the country) refers to data traffic originated within the country from mobile networks. Download and upload traffic should be added up and reported together. Traffic should be measured at the end-user access point.

Wholesale and walled-garden traffic should be excluded. The traffic should be reported in terabytes.
<b>Population coverage</b>
<i>3G population coverage</i>
Percentage of the population covered by at a 3G mobile network refers to the percentage of inhabitants that are within range of a 3G mobile-cellular signal, irrespective of whether or not they are subscribers. This is calculated by dividing the number of inhabitants that are covered by a 3G mobile-cellular signal by the total population and multiplying by 100.
<i>4G/LTE etc. population coverage</i>
Percentage of the population covered by a 4G/LTE mobile network refers to the percentage of inhabitants that are within range of a 4G/LTE mobile-cellular signal, irrespective of whether or not they are subscribers. This is calculated by dividing the number of inhabitants that are covered by a 4G/LTE mobile-cellular signal by the total population and multiplying by 100. Note that all LTE variants are included.
<b>Internet bandwidth</b>
<b>International Internet bandwidth</b>
<i>International outgoing Internet bandwidth</i>
Refers to the total outgoing used capacity of international Internet bandwidth, in Mbit/s. This is measured as the sum of outgoing (uplink) capacity of all Internet exchanges offering international bandwidth.
<i>International incoming Internet bandwidth</i>
Refers to the total incoming used capacity of international Internet bandwidth, in Mbit/s. This is measured as the sum of incoming (downlink) capacity of all Internet exchanges offering international bandwidth.
<b>BRICS</b>
the acronym coined for an association of five major emerging national economies: Brazil, Russia, India, China and South Africa
<i>Virtual post users</i>

Is a digital mailbox post service that you access via any computer, tablet, or smartphone. Receive, forward, pick up, shred, or discard mail and packages. It allows you to manage your postal mail and packages with our smartphone app or online anytime, from anywhere

## Broadcasting definitions used.

Indicators	Indicator Definition
Total revenue	The aggregated revenue includes Total Broadcasting Services Revenue and should tie back to your overall revenue
Total broadcasting services revenue	Sum of revenue from all broadcasting services specifically itemised below (in local currency at current prices).
Revenue from Broadcasting Promotions (with flighting code).	Revenue from Broadcasting Promotions (with flighting code). Excludes revenue from promotions without flighting code.
Total of any other revenue	Any other revenue not specifically itemised above
Broadcasting employment - Total	Persons employed in full-time equivalents. Persons employed in full-time equivalents refers to the total number of persons, in full-time equivalent (FTE) units, employed by telecommunication operators in the country for the provision of telecommunication services, including fixed-telephone, mobile-cellular, Internet and data services. This indicator excludes staff working in broadcasting businesses that offer only traditional broadcasting services. Part-time staff should be expressed in terms of full-time staff equivalents (FTE).
Broadcasting employment-female	Persons employed by all broadcasting licensees; female should be expressed in terms of full-time staff equivalents.
Broadcasting employment-people living with disabilities.	Persons employed by all broadcasting licensees who are living with disabilities.
Broadcasting employment-Unskilled	Persons employed by all broadcasting licensees who possess no particular skills and usually do not require formal education.



Broadcasting employment-Semiskilled	Persons employed by all broadcasting licensees who have or requires less training.
Broadcasting employment-skilled	Persons employed by all broadcasting licensees who have special skill, training, knowledge, and (usually acquired) ability in their work. A skilled worker may have attended a college, university or technical school.
Broadcasting employment- Top Management (EXCO members)	Persons employed by all broadcasting licensees, Top Management, should be expressed in terms of full-time staff equivalents. This should include Exco and other Executives.
Broadcasting employment-Black Top Management (EXCO members)	Persons employed by all broadcasting licensees, Black Top Management, should be expressed in terms of full-time staff equivalents. This should include Exco and other Executives.
Broadcasting employment-Black Top Female Management (EXCO members)	Persons employed by all broadcasting licensees, Black Top Female Management, should be expressed in terms of full-time staff equivalents. This should include Exco and other Executives.
Investment	Total annual investment in broadcasting services, also referred to as annual capital expenditure, refers to the investment during the financial year in broadcasting services. The indicator is a measure of investment in broadcasting infrastructure in the country and includes expenditure on initial installations and additions to existing installations where the usage is expected to be over an extended period of time. It excludes expenditure on research and development (R&D), annual fees for operating licences and the use of radio spectrum, and investment in broadcasting software or equipment for internal use.
Total Number of Local independent productions	Local independent television product means a production of television content by a person not directly or indirectly employed by any broadcasting service licensee; or by a person who is not controlled by or is in control of any broadcasting services.
Total Number of international independent productions	International independent television product means a production of television content by a person not directly or indirectly employed by any broadcasting service licensee; or by a person who is not controlled by or is in control of any broadcasting services.

## Postal Sector Definitions used.

Indicators required	Indicator Definition
Postal employment- female	Persons employed by all Postal licensees; female (should be expressed in terms of full-time staff equivalents).
Postal employment- People living with disabilities	Persons employed by all Postal licensees who are living with disabilities.
Postal employment- Unskilled	Persons employed by all Postal licensees who possess no skills and usually do not require formal education.
Postal employment- Semiskilled	Persons employed by all Postal licensees who have or require less training.
Postal employment- skilled	Persons employed by all Postal licensees who have special skill, training, knowledge, and (usually acquired) ability in their work. A skilled worker may have attended a college, university or technical school.
Postal employment- Top Management (EXCO members)	Persons employed by all Postal licensees, Top Management, should be expressed in terms of full-time staff equivalents. This should include Exco and other Executives.
Postal employment- Black Top Management (EXCO members)	Persons employed by all Postal licensees, Black Top Management, should be expressed in terms of full-time staff equivalents. This should include Exco and other Executives.
Postal employment- Black Top Female Management (EXCO members)	Persons employed by all Postal licensees, Black Top Female Management, should be expressed in terms of full-time staff equivalents. This should include Exco and other Executives.
Letter delivery services (Registered letters)	Letter post: letter-post items essentially consist of letters, postcards, printed papers (newspapers, periodicals, advertising, etc.), small packets, items for the blind and, as applicable in the domestic service, commercial papers or samples of merchandise; items should not exceed 2 kg in weight
Letters: Domestic service and international outbound (International Mail Centre Volumes)	Letter post: letter-post items essentially consist of letters, postcards, printed papers (newspapers, periodicals, advertising, etc.), small packets, items for the blind and, as applicable in the domestic service,

	commercial papers or samples of merchandise; items should not exceed 2 kg in weight
Letters: Domestic service and international outbound (Local Volumes)	Letter post: letter-post items essentially consist of letters, postcards, printed papers (newspapers, periodicals, advertising, etc.), small packets, items for the blind and, as applicable in the domestic service, commercial papers or samples of merchandise; items should not exceed 2 kg in weight
Parcel delivery services	Parcels: non-express items containing mainly goods. Parcels included should not exceed 50 kg
Parcel: Domestic service and international outbound (International Mail Centre Volumes)	Parcels: non-express items containing mainly goods. Parcels included should not exceed 50 kg
Parcel: Domestic service and international outbound (Local Volumes)	Parcels: non-express items containing mainly goods. Parcels included should not exceed 50 kg
Express delivery services (EMS)	Express items: items containing correspondence, documents and goods which are processed in the most rapid way. Again, the items included should not exceed 50 kg.
Express: Domestic service and international outbound (International Mail Centre Volumes)	Express items: items containing correspondence, documents and goods which are processed in the most rapid way. Again, the items included should not exceed 50 kg.
Express: Domestic service and international outbound (Local Volumes)	Express items: items containing correspondence, documents and goods which are processed in the most rapid way. Again, the items included should not exceed 50 kg.
Mail delivery Parameters (Physical Address %)	Mail delivery Parameters with Physical Address in %
Mail delivery Parameters (PO Boxes %)	Mail delivery Parameters with PO Boxes in %
Number of inhabitants per postal service point	Number of inhabitants per postal service point

### Appendix 3: Aggregated data from ICASA questionnaires

The table below lists the aggregated figures from the three ICASA questionnaires to the electronic communications licensees, the TV broadcasting licensees, and the postal services operators, for the period of 01 October 2023 -30 September 2024. For definitions, please refer to the Appendix 2 above, and for more clarification please refer to the notes accompanying the associated figures in the report.

<b>Telecommunication data used</b>	
<b>Total telecommunication revenue</b>	<b>R232 667 G56 4G3</b>
<b>Total fixed line revenue</b>	<b>R3 861 313 G80</b>
Revenue from retail fixed-telephone services	R74 183 710
Revenue from fixed-telephone subscription charges	R1 838 688 708
Revenue from fixed-telephone calls	R1 948 441 562
<b>Total Fixed Internet and data revenue</b>	<b>R34 G66 212 674</b>
Fixed Internet revenue (R)	R10 773 781 464
Revenue from fixed (wired)-broadband services	R14 803 339 899
Other wireless-broadband services revenue	R5 151 772 972
Other telecommunication services revenue, including leased lines revenue and fixed value-added telecommunication services	R4 237 318 338
<b>Total mobile services revenue (Rm)</b>	<b>R132 381 7G0 236</b>
Revenue from voice services	R28 644 294 682
Revenue from outbound roaming (R)	R1 432 769 432
Revenue from mobile data services	R67 536 521 904
Revenue from text and multimedia messaging services	R4 146 032 890
Prepaid revenue mobile voice	R20 688 642 281
Prepaid revenue mobile data	R39 123 488 942
Prepaid revenue mobile messaging	R544 555 128
Other mobile services revenue	R30 622 171 327
<b>Total Social revenue</b>	<b>R15G 372 523 875</b>
Facebook	R58 944 716 521
WhatsApp	R49 273 065 311
TikTok	R38 973 211 499
Instagram	R9 977 499 755
X (Twitter)	R2 204 030 789
<b>Total of any other revenue</b>	<b>R61 458 63G 603</b>
Interconnection revenues	R4 704 253 589
Equipment revenue	R33 819 773 720
Any other revenue	R22 934 612 294
<b>Total telecommunication investment</b>	<b>R2G 080 761 336</b>
Annual investment in fixed-telephone services	R16 969 022
Annual investment in fixed (wired)-broadband services	R3 212 872 618
Annual investment in mobile communication services	R17 737 369 593

Infrastructure	R3 188 609 771
Expansion	R3 322 915 751
Maintenance	R937 886 018
Other annual investment in telecommunication services	R664 138 563
<b>Fixed line subscriptions</b>	<b>G54 G52</b>
Analogue fixed-telephone lines	282 505
VoIP subscriptions	389 041
Fixed wireless local loop subscriptions	35 236
ISDN voice-channel equivalents	246 010
Fixed public payphone	2 160
<b>Mobile cellular subscriptions</b>	<b>116 813 021</b>
<b>Prepaid mobile-cellular telephone subscriptions</b>	<b>G7 505 576</b>
Prepaid mobile-cellular telephone subscriptions (Urban area)	92 094 605
Prepaid mobile-cellular telephone subscriptions (Rural area)	5 410 971
<b>Postpaid mobile-cellular telephone subscriptions</b>	<b>1G 307 445</b>
Postpaid mobile-cellular telephone subscriptions (Urban area)	18 057 920
Postpaid mobile-cellular telephone subscriptions (Rural area)	1 249 525
Mobile Cellular Active Subscriptions (Active for more than 90 Days)	94 084 272
M2M mobile-network subscriptions	14 046 761
<b>Fixed broadband subscriptions</b>	<b>2 735 G68</b>
DSL Internet subscriptions	241 947
Fibre-to-the-home/building Internet subscriptions	2 465 453
Other fixed (wired)-broadband subscriptions	28 568
<b>Wireless-broadband subscriptions</b>	<b>G03 784</b>
Satellite broadband subscriptions	13 667
Terrestrial fixed wireless broadband subscriptions	890 117
<b>Active mobile broadband subscriptions</b>	<b>83 41G 734</b>
Standard mobile-broadband subscriptions	57 170 815
Dedicated mobile-broadband subscriptions	26 248 919
Mobile data users	42 310 450
<b>Fixed line traffic</b>	<b>3 562 566 G53</b>
Local fixed-to-fixed telephone traffic, in minutes	2 145 515 506
Long-distance fixed-to-fixed telephone traffic, in minutes	1 417 051 447
Fixed-to-mobile telephone traffic	6 702 202 373
<b>International incoming and outgoing fixed-telephone traffic</b>	<b>22G 74G 077</b>
International outgoing fixed-telephone traffic, in minutes	147 671 521
International incoming fixed-telephone traffic, in minutes	82 077 556
<b>Total national mobile traffic</b>	<b>72 G56 528 258</b>
Outgoing mobile traffic to same mobile network	49 830 160 256
Mobile to other mobile networks	20 794 202 484
Mobile to fixed	2 332 165 518
International outgoing from mobile	272 640 071
International incoming to mobile	181 191 042
SMS traffic	10 317 071 486
SMS international traffic	15 860 839

Mobile data traffic	5 306 852
3G population coverage	99,79%
4G/LTE etc. population coverage	99,07%
Geographical Broadband Coverage	82,06%
5G Coverage	46.64%
<b>International Internet bandwidth (Mbps) capacity</b>	<b>3 242 54G</b>
International outgoing Internet bandwidth	967 075
International incoming Internet bandwidth	2 275 474
<b>Smartphone subscriptions</b>	<b>82 742 112</b>
Smartphone subscriptions	R82 742 112
<b>Batter and Generator used when there is no electricity (Loadshedding), and Revenue spend during this period</b>	
Total Number of batteries	44 708
Total Number of Generators	855
Total Amount spend on batteries	R173 754 518
Total Amount spend on Generators	R211 472 128
<b>Infrastructure Expenditure</b>	
Theft	R69 591 078
Vandalism	R213 831 508
<b>ICT Sector Black Economic Empowerment Measures</b>	
Telecommunication employment -Total	30 597
Telecommunication employment- female	11 737
Telecommunication employment- People living with disabilities	390
Telecommunication employment- Unskilled	568
Telecommunication employment- Semi skilled	5 345
Telecommunication employment- skilled	21 158
Telecommunication employment- Youth (male) 35 years and below	4 849
Telecommunication employment- Youth (female) 35 years and below	3 507
Telecoms employment- Top Management (EXCO Members)	283
Telecoms employment- Black Top Management (EXCO Members)	107
Telecoms employment- Black Top Female Management (EXCO Members)	47
Procurement Spend from all suppliers	R202 465 092 559
Procurement Spend from all suppliers based on the B-BBEE Procurement Recognition Levels	R185 798 039 765
<b>Broadcasting data used</b>	
<b>Total broadcasting services revenue</b>	<b>R34 624 7G3 241</b>
Broadcasting Advertising revenue	R6 200 641 300
Broadcasting Subscriptions revenue	R26 207 301 314
Revenue from Broadcasting Promotions (with flighting code).	R28 055 1G3
Revenue from Sponsorships	R604 G34 237
Revenue from Government or State Grant	R10G 532 386
Revenue from Donations	R11 667 783

Revenue from Infomercials	R4 521 635
Revenue from Membership fees	R4 3G6 536
Total of any other revenue	R1 453 742 858
<b>Itemised expenditure</b>	<b>R16 003 565 G74</b>
Number of Pay TV subscribers	7 424 830
Broadcasting employment -Total	3 371
Broadcasting employment- Female	1 736
Broadcasting employment- People leaving with disabilities	90
Broadcasting employment- Unskilled	53
Broadcasting employment- Semi skilled	521
Broadcasting employment- Skilled	2 533
Broadcasting employment- Youth (male) 35 years and below	441
Broadcasting employment- Youth (female) 35 years and below	526
Broadcasting employment- Top Management (EXCO members)	64
Broadcasting employment- Black Top Management (EXCO members)	44
Broadcasting employment- Black Top Female Management (EXCO members)	22
Procurement Spend from all suppliers	R7 550 8G1 54G
Procurement Spend from all suppliers based on the B-BBEE Procurement Recognition Levels	R5 867 65G G02
<b>Total Number of Television (stations and distributors)</b>	<b>21 841 868</b>
Number of Digital Satellite Stations	56
Number of Digital Terrestrial Stations	92
Number of Analogue Terrestrial Stations	4
Number of Signal Distributors	7
Number of Set-top boxes	21 841 703
Number of Content Distributors	6
<b>Investment</b>	<b>R61 813 G35</b>
Infrastructure	R27 447 846
Expansion	R2 G70 378
Maintenance	R12 567 2GG
Others	R18 828 413
Total Number of Local independent productions	53
Total Number of International independent productions	40
Total Number of productions by the broadcasters	195
Total expenditure on Local independent productions (In Rand)	R7G6 502 635
Total expenditure on international Independent productions (In Rand)	R718 G18 107
Total expenditure on broadcaster productions (In Rand)	R616 821 61G
<b>Postal services data used</b>	
<b>Total Postal Sector revenue</b>	<b>R4 430 045 157</b>
Retail products revenue	R3 G87 000
Services rendered - Postal	R1 225 323 000
Services rendered - Agency and money transfer	R403 622 000
Services rendered - Courier	R2 7G2 500 331

Total of any other revenue	R4 612 825
Postal employment -Total	9 570
Postal employment- Female	4 231
Postal employment- Disabled	38
Postal employment- Unskilled	61
Postal employment- Semi skilled	7 419
Postal employment- Skilled	789
Postal employment- Youth (male) 35 years and below	947
Postal employment- Youth (female) 35 years and below	1 544
Postal employment- Top Management (EXCO members)	19
Postal employment- Black Top Management (EXCO members)	6
Postal employment- Black Top Female Management (EXCO members)	2
Procurement Spend from all suppliers	RG4 153 427
Procurement Spend from all suppliers based on the B-BBEE Procurement Recognition Levels	RG1 500 648
Letter delivery services (Registered letters)	152 G61 335
Letters: Domestic service and international outbound (International Mail Centre Volumes)	5 307 201
Letters: Domestic service and international outbound (Local Volumes)	147 654 134
Parcel delivery services	3 352 7G2
Parcel: Domestic service and international outbound (International Mail Centre Volumes)	14 242
Parcel: Domestic service and international outbound (Local Volumes)	3 338 550
Express delivery services (EMS)	2 43G 330
Number of PO Boxes	3 616 286
Number of PO Boxes rented	199 862
Number of physical addresses in database	16 374 697

Source: ICASA Telecommunications, TV Broadcasting and Postal Questionnaires, December 2024.