



Independent Communications Authority of South Africa

Independent Communications Authority of South Africa

350 Witch-Hazel Avenue, Eco Point Office Park

Eco Park, Centurion.

Private Bag X10, Highveld Park 0169

BI-ANNUAL REPORT ON THE ANALYSIS OF TARIFF NOTIFICATIONS SUBMITTED TO ICASA FOR THE PERIOD 01 JANUARY 2021 TO 30 JUNE 2021

Disclaimer: Information contained in this Report is based on notifications submitted by licensees in terms of regulation 9(1) of the Standard Terms and Conditions Regulations, Government Gazette No. 33294; regulation 5(1) of the End User and Subscriber Service Charter Regulations, Government Gazette No. 39898, as amended, regulations 4(3) and 4(4) ICT COVID-19 National Disaster Regulations, 2020, Government Gazette 43207 and regulation 4 of the ICT COVID-19 National Disaster Fifth Amendment Regulations, 2021, Government Gazette 44631. Where necessary additional research was conducted to compare tariff plans.

Table of Contents

Glossary	12
Executive Summary	13
1. Introduction.....	16
2. Analysis of Tariffs Notified to the Authority	17
2.1. Analysis of Standard Prepaid Data Tariffs and Data Bundles Tariff Plan Changes	17
2.1.1. Prepaid Data plans	17
2.1.1.1. Prepaid Data Prices for bundles offered by MNOs.....	18
2.1.1.1.1. Prepaid 30-day validity period data bundle	18
2.1.1.1.2. Other standard prepaid data bundles offered by MNO's	28
2.1.1.1.2.1. Cell C Daily Data Bundles and 7-Day Data Bundles	28
2.1.1.1.2.2. Cell C University Bundles	29
2.1.1.1.2.3. MTN Rush Hour and Daily Data Bundles.....	30
2.1.1.1.2.4. FNB Connect Data Bundles.....	31
2.1.1.1.2.5. Vodacom Just 4 You Bundles	32
2.1.1.1.2.6. Vodacom 30-Day Prepaid Recurring Bundles	33
2.1.1.1.2.7. Rain One Plan	34
2.1.1.1.2.8. MTN Personalised Monthly Data Bundles	35
2.1.1.1.2.9. MTN Everyday Gigs Bundles	36
2.1.1.1.2.10. MTN Hourly, Weekly and Fortnightly Data Bundles	37
2.1.1.1.2.11. MTN MyTown Offers.....	37
2.1.1.1.2.12. Vodacom Mobile Internet + Night Owl Bundles...	39
2.1.1.2. Standard Prepaid Data Prices for bundles offered by MVNOs	40
2.1.1.2.1. Sakeng Tariff Plans.....	40

2.1.1.3.	Daily and Weekly Standard Prepaid Data Prices for bundles offered by MNOs and MVNOs	42
2.1.1.3.1.	Daily and Weekly Data Bundles	42
2.1.2.	<i>Over-the-Top (OTT) Service Offerings</i>	45
2.1.2.1.	Cell C Facebook Flex	46
2.1.2.2.	MTN Youth Pulse Referral Promotion	46
2.1.2.3.	Vodacom Ticket	46
2.1.2.4.	MTN Work From Home/Study Bundles	47
2.1.2.5.	MTN Personalised Work From Home Bundles	48
2.2.	Analysis of Promotional Prepaid Data Tariffs	49
2.2.1.	<i>MTN PAYG Double Your Bundle Promotion</i>	50
2.3.	Regulatory interventions underway to address data costs	51
2.3.1.	<i>The ICT COVID-19 National Disaster Regulations</i>	52
2.3.2.	<i>Licensing processes for the IMT spectrum and the WOAN</i>	52
2.3.3.	<i>Market Inquiry into the Mobile Broadband Services Markets</i> ...	53
2.4.	Analysis of Standard Prepaid Voice Tariffs	54
2.4.1.	<i>Analysis of standard voice bundles billed per minute</i>	54
2.4.1.1.	<i>Cell C Prepaid Voice Bundles</i>	54
2.4.1.2.	<i>MTN Everyday Talk Bundles</i>	55
2.5.	Analysis of Integrated Prepaid Tariff Plans	56
2.5.1.	<i>Analysis of Standard Prepaid Integrated Bundles</i>	56
2.5.1.1.	Cell C All-In-One Prepaid Tariff Plan	56
2.5.1.1.1.1.	<i>Telkom Thola More Prepaid Tariff Plan</i>	57
2.5.1.2.	Shoprite K'nect Mobile Prepaid Tariff Plan	58
2.5.2.	<i>Promotional Prepaid Integrated Plans</i>	60
2.5.2.1.	MTN Student Connect Bundles	60
2.5.2.2.	<i>Cell C CVM Bundles Promotion</i>	61
2.6.	LTE and Wi-Fi Tariff Plans	62

2.6.1.	<i>Herotel Wireless and Fibre Amendment</i>	62
2.6.2.	<i>MTN Supersonic While You Wait F-LTE Service</i>	63
2.6.3.	<i>Telkom While you wait 100GB LTE Data</i>	63
2.6.4.	<i>MTN F-LTE 1TB Home Month-to-Month SIM-only Plan</i>	64
2.6.5.	<i>Cell C Home Connecta Flexi Promotion</i>	65
2.6.6.	<i>Cell C Home Connecta</i>	66
2.6.7.	<i>MTN BozzaGigs LTE Price Plan and Bundles</i>	66
2.6.8.	<i>Rain 19 hours unlimited off-peak for any device</i>	67
2.6.9.	<i>MTN Supersonic Air Fibre</i>	67
2.7.	<i>Month-to-Month Fibre-to-the-Home Tariff Plans</i>	68
2.7.1.	<i>Self-Built FTTH Offerings</i>	68
2.7.1.1.	<i>Vox Telecom FTTH</i>	68
2.7.1.2.	<i>Cipherwave Zoom Fibre</i>	70
2.7.1.3.	<i>Francois O’Kennedy W.O.R.X FWORX 10MBPS</i>	70
2.7.1.4.	<i>Ladysmith Wireless Solutions</i>	71
2.7.1.5.	<i>Cybersmart Big Bay MPOA – Lightspeed FTTH</i>	72
2.7.1.6.	<i>Herotel FTTH</i>	72
2.7.1.7.	<i>Cybersmart Lightspeed Home Fibre</i>	73
2.7.1.8.	<i>MetroFibre FTTH</i>	73
2.7.1.9.	<i>Mzansi Lisetta and Printing</i>	74
2.7.2.	<i>Fibre Plans offered through 3rd Party Fibre Network Operators</i>	75
2.7.2.1.	<i>Vodacom FTTH Service on Openserve</i>	75
2.7.2.2.	<i>Cybersmart on Vodacom FTTH Packages</i>	76
2.7.2.3.	<i>Directel FTTH</i>	77
2.7.2.4.	<i>MWEB on Openserve FTTH</i>	78
2.7.2.5.	<i>Vodacom on Octotel FTTH</i>	80
2.7.2.6.	<i>MWEB on Vumatel FTTH</i>	80

2.7.2.7. Cell C C-Fibre Plan on Openserve FTTH	82
2.7.2.8. Cybersmart on Openserve FTTH.....	82
2.7.2.9. Cybersmart on Frogfoot FTTH	83
2.7.2.10. SADV on Vumatel Network FTTH.....	84
2.7.2.11. Amobia on Buh-Rein FTTH	85
2.7.2.12. MTN Supersonic on Openserve FTTH	85
2.7.2.13. Cell C C-Fibre Baobab Plan FTTH	86
2.7.2.14. Cell C C-Fibre on Vumatel FTTH	87
2.7.2.15. MWEB on Frogfoot Fibre FTTH	88
2.7.2.16. Cell C on Frogfoot Fibre Plan	89
2.7.2.17. Directel on Openserve FTTH	89
2.7.2.18. Amobia on Frogfoot FTTH Packages	90
2.7.2.19. Cybersmart on Openserve Uncapped Lite Fibre	91
2.7.2.20. Vodacom Fibre on Vuma Reach Network.....	91
2.7.2.21. Cipherwave All Home-Connect FTTH Packages on Frogfoot	92
2.7.2.22. Telkom on Frogfoot FTTH	92
2.7.2.23. MWEB on Century City Connect FTTH	93
2.7.2.24. MWEB on MetroFibre Networx	94
2.7.2.25. Directel on MetroFibre FTTH	94
2.7.2.26. Amobia on Vumatel FTTH	95
2.7.2.27. MTN Supersonic on Light Tree FTTH at Villa Italia	96
2.7.2.28. Vodacom Fibre on Frogfoot.....	97
2.7.2.29. Cell C Metro Fibre Plan	98
2.7.2.30. Amobia on Frogfoot FTTH Packages – Uncapped Packages	99
2.7.2.31. Cybersmart on Frogfoot FTTH	99
2.7.2.32. MWEB FTTH.....	100

2.7.2.33. Cell C C-Fibre LinkLayer Network.....	101
2.7.2.34. Cell C C-Fibre on Octotel Tariff Plan	102
2.7.2.35. Cell C C-Fibre on Vumatel Tariff Plan	103
2.7.2.36. Directel on Vumatel FTTH	104
2.7.2.37. Cybersmart Lightspeed Home Fibre	105
2.7.2.38. Amobia on Buh-Rein FTTH	105
2.7.2.39. Amobia on Vumatel FTTH	106
2.7.2.40. Directel on Octotel FTTH.....	107
2.7.2.41. Directel on Zoom FTTH	107
2.7.2.42. Directel on LinkLayer	108
2.7.3. Promotional FTTH Plans.....	108
2.7.3.1. Rain Unlimited Home 5G Basic FTTH	108
2.7.3.2. SADV Fast Fibre Serengeti FTTH Promotion	109
2.7.3.3. Cipherwave Home-Connect FTTH Packages on Zoom Fibre 110	
2.7.3.4. MTN Double Up Promotion.....	110
2.7.3.5. MTN Century City Connect Fibre Double Up Promotion .	111
3. Conclusion.....	111
4. References	114
Annexure A: List of Other Tariff Notifications Filed During the Period Under Review	115
Annexure B: Promotions that Ended During the Period Under Review .	133

List of Tables

Table 1: Type of Notifications Received - 01 January 2021 to 30 June 2021	13
Table 2: Prepaid Data Bundle Standard Prices and OOB Equivalent Prices for Vodacom and MTN.....	20
Table 3: Prepaid Data Bundles Standard Prices and OOB Equivalent Prices for Cell C and Telkom Mobile.....	21
Table 4: 2020/21 FY Q4 to 2021/22 FY Q2 Salient Changes to 30-dayStandard Prepaid Data Bundles.....	27
Table 5: Cell C's additional Daily Data Bundles and 7-Day Data Bundles	28
Table 6: Cell C's University Bundles.....	29
Table 7: Rush Hour and Daily Data Bundles	30
Table 8: FNB's amendment to its Connect Data Bundles	32
Table 9: Vodacom Just 4 You Bundles.....	32
Table 10: Vodacom 30-Day Prepaid Recurring Bundles	34
Table 11: MTN Personalised Monthly Data Bundles.....	35
Table 12: Amendment and new bundles of the MTN Everyday Gigs Bundles	36
Table 13: MTN Data Bundles Portfolio	37
Table 14: MTN's Additional MyTown Offers (Sample).....	38
Table 15:Vodacom Mobile Internet + Night Owl Bundles	39
Table 16: Sakeng Mobile's Amended Once-off Data Bundles	41
Table 17: Standard Daily and Weekly Data Bundles	42
Table 18: In-bundle Rates for the Standard Daily and Weekly Data Bundles....	43
Table 19: MTN Work From Home/Study Bundles.....	47
Table 20: MTN Personalized Work From Home Bundles (sample).....	48
Table 21:Double Your Bundle Promotional Offer (Sample).....	50
Table 22:Cell C Prepaid Voice Bundles	54
Table 23: MTN Everyday Talk Bundles	55
Table 24: Cell C All-In-One Prepaid Tariff Plan.....	57
Table 25:Telkom Thola More Prepaid Tariff Plan OOB Rates	58
Table 26:Telkom Thola More Free Integrated Bundles	58
Table 27:Cell C Shoprite K'nect Mobile Prepaid Tariff Plan	59
Table 28: Cell C All-in-One Tariff Plan vs Shoprite K'nect Mobile Prepaid Tariff Plan	59
Table 29:MTN Student Connect Bundles.....	60
Table 30:Cell C CVM Bundles Promotion.....	61

Table 31:Herotel Wireless and Fibre Amendment.....	63
Table 32:Telkom While you wait 100GB LTE Data Promotion	64
Table 33:MTN F-LTE 1TB Home Month-to-Month SIM-only Plan.....	64
Table 34:Cell C Home Connecta Flexi Promotion.....	65
Table 35:Home Connecta Flexi Promotional Bundles.....	65
Table 36:MTN BozzaGigs LTE Bundles.....	66
Table 37: BozzaGigs LTE OOB Rates.....	66
Table 38: MTN Supersonic Air Fibre	67
Table 39:Vox Telecom FTTH.....	69
Table 40:Cipherwave Zoom Fibre.....	70
Table 41:Ladysmith Wireless Solutions FTTH	71
Table 42:Cybersmart Big Bay MPOA - Lightspeed FTTH.....	72
Table 43:Herotel FTTH	72
Table 44:Cybersmart Lightspeed Home Fibre	73
Table 45:MetroFibre FTTH.....	74
Table 46:Mzansi Lisetta Media and Printing Bandwidth offer	75
Table 47:Vodacom FTTH Service on Openserve	75
Table 48:Cybersmart on Vodacom FTTH Packages	76
Table 49:Directel FTTH.....	77
Table 50:MWEB on Openserve FTTH.....	79
Table 51:Vodacom on Octotel FTTH.....	80
Table 52:MWEB on Vumatel FTTH	81
Table 53:Cell C C-Fibre Plan on Openserve	82
Table 54:Cybersmart on Openserve FTTH.....	83
Table 55:SADV on Vumatel Network FTTH	84
Table 56:Amobia on Buh-Rein FTTH	85
Table 57:MTN Supersonic on Openserve FTTH.....	85
Table 58: Amendments to MTN Supersonic on Openserve FTTH	86
Table 59:Cell C C-Fibre Baobab Plan.....	87
Table 60:Cell C C-Fibre on Vumatel FTTH	87
Table 61:MWEB on Frogfoot FTTH	88
Table 62:Cell C on Frogfoot Fibre Plan	89
Table 63:Directel on Openserve FTTH	90
Table 64:Amobia on Frogfoot FTTH Packages.....	90
Table 65:Telkom on Frogfoot FTTH.....	92

Table 66:MWEB on Century City Connect FTTH	93
Table 67:MWEB on MetroFibre Networx FTTH.....	94
Table 68:Directel on MetroFibre FTTH	95
Table 69:Amobia on Vumatel FTTH.....	96
Table 70:Supersonic Light Tree at Vanilla Italia	96
Table 71:Vodacom Fibre Broadband on Frogfoot.....	97
Table 72:Cell C Metro Fibre Plans.....	98
Table 73:Amobia on Frogfoot FTTH Packages - Uncapped Packages	99
Table 74:Cybersmart on Frogfoot FTTH.....	99
Table 75:MWEB FTTH.....	100
Table 76:Cell C C-Fibre LinkLayer Network	102
Table 77:Cell C C-Fibre on Octotel Tariff Plan	102
Table 78:Cell C C-Fibre on Vumatel Tariff Plan	103
Table 79:Directel on Vumatel FTTH	104
Table 80:Cybersmart Lightspeed Home Fibre	105
Table 81:Amobia on Buh-Rein FTTH	105
Table 82:Amobia on Vumatel FTTH.....	106
Table 83:Directel on Octotel FTTH	107
Table 84:Directel on Zoom Fibre	107
Table 85:Directel on LinkLayer FTTH	108
Table 86:SADV Fast Fibre Serengeti FTTH Promotion.....	109
Table 87:MTN Supersonic on Evotel Double Up Promotion	110
Table 88: MTN's Century City Double Up Promotion	111
Table 89:Cell C 50GB for 6 Months Black Friday Promotional Bundle	116
Table 90:Vodacom Fibre Broadband Promotions	118
Table 91:Telkom Smartbroadband Wireless Uncapped Business Hours (SIM only) Promotion	119
Table 92:Additional Cell C All-in-One Double Data Bundles.....	121
Table 93:Cell C 100GB and 200GB for 6 Months Promotion	122
Table 94:Cell C Recharge and Get Promotion additional Tiers	123
Table 95:Vodacom 30 Day Recurring Promotional Bundles	123
Table 96:Vodacom 30-Day Prepaid Recurring Promotional Bundles.....	124
Table 97:MTN Personalised Monthly Data (Sample).....	125
Table 98:VodaBucks Store Data Bundle Offers (Sample).....	126
Table 99:Rain Unlimited Home 5G Standard Promotion.....	127

Table 100:Rain Unlimited Home 5G Premium Promotion	128
Table 101:Vodacom Everyday-ta Promotional Bundles.....	128
Table 102:Cell C Opera Gifting Bundles Promotion	129
Table 103:Vodacom YouTube Promotion (Sample)	130
Table 104:MTN Fixed LTE - MyMTN Home Promotion.....	131
Table 105:MetroFibre GigaGo Vumatel Promotion	131
Table 106:MetroFibre GigaGo Vumatel Promotion	132

List of Figures

Figure 1: Data Price changes for 150MB standard 30-day prepaid data bundles	24
Figure 2: Data Price changes for 500MB standard 30-day prepaid data bundles	25
Figure 3: Data Price changes for 1GB standard 30-day prepaid data bundles...	26
Figure 4: Daily 1GB Data Bundle Price	44

Glossary

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

Executive Summary

The Independent Communications Authority of South Africa (“ICASA” / “the Authority”) is mandated to regulate electronic communications in the public interest. In ensuring that it carries this mandate effectively, it monitors the Information Communications and Technology (“ICT”) sector to ensure that interests of consumers are promoted as per object 2(n) of the Electronic Communications Act, 2005, as amended (Act No. 36 of 2005) (“ECA”). This tariff analysis report aims to ensure that end-users (customers) are aware of the various prepaid retail tariffs in the telecommunications sector which were filed with the Authority during the period of 01 January 2021 to 30 June 2021¹, as well as provide an update on initiatives which are currently underway to reduce the cost to communicate. This ensures that there is retail tariff transparency, which could potentially encourage competition as it is likely to minimise pricing and product information asymmetries in the sector.

Table 1 shows the types of notifications received in the period 01 January 2021 to 30 June 2021.

Table 1: Type of Notifications Received - 01 January 2021 to 30 June 2021

Notification Type	Cell C	MTN	Telkom	Vodacom	MWEB	OLOs	Grand Total
Amendment	35	15	3	25	4	16	98
Extension	20	15	4	5	-	-	44
New Product	17	11	8	10	1	26	73
Promotion	-	19	-	4	-	1	24
Termination	2	-	-	-	-	2	4
Grand Total	74	60	15	44	5	45	243

Source: ICASA Database based on Tariff Notifications

¹ There are instances whereby information reported falls outside of this review period is provided in this report. These are where the additional information is to the benefit of customers such as extensions of promotions and/or reduced data prices for standard 30-day prepaid data bundles offered by various licensees which were possibly were filed outside of the review period or whereby the intention is to ensure accurate reporting and to reduce information asymmetries, which is one of the main purposes of the report. The inclusion of such information also considers feedback received during the licensee consultation phase of the production of this Report.

The Authority received a total of 243 tariff notifications, which included 24 new promotions, 98 amendments, 44 extensions, 73 new products and 4 terminations during the period under review, i.e., 01 January 2021 to 30 June 2021.

In the mobile data services market, salient changes in the period under review were the amendment of the 30-day standard prepaid data bundles from Vodacom. The operator increased the data bundle volume of its 150MB data bundle to 200MB while the price remained unchanged at R 29. The 325MB data bundle offered at R 55 was replaced by the 350MB data bundle offered at R 49, which is R 6 less than the price of the previously offered 325MB data bundle. The price of the 500MB data bundle was also reduced by R 10 or 12.7% from R 79 to R 69, while the 1GB data bundle price was reduced by R 14 or 14.1% from R 99 to R 85. Vodacom reintroduced its 30-day standard prepaid 2GB data bundle, pricing it at R 159, which is R 90 or 36.1% less than the previous price² of R 249.

In the daily and weekly data services market, there were amendments from Cell C and MTN. Cell's amendment filed with the Authority on 16 February 2021 entailed the introduction of new daily and weekly data bundles and price amendments. MTN's amendment of the Rush Hour and Daily Data Bundles filed with the Authority on 19 February 2021 entailed a price reduction of selected data bundles and the introduction of new hourly and daily data. For example, MTN reduced its 1GB daily data by 42% from a price of R 50 to R 29. Cell C's 1GB daily data bundle amendment entailed a price increase from R 20 to R 28, negatively affecting customers. Despite the price increase of the Cell C 1GB daily data bundle, it remains the lowest 1GB daily data bundle in the market among the large Mobile Network Operators ("MNOs"), followed by MTN (R 29).

The National State of Disaster is still in place and as such the ICT COVID-19 National Disaster Regulations which prescribe minimum standards which licensees must follow during this period are still being enforced. These Regulations were amended on 28 May 2021. The amendment allowed any tariffs which are intended

² It should be noted that Vodacom's previous 30-day standard prepaid 2GB offering can be found in the 2018/19FY Q4 Bi-Annual Tariff Analysis Report, which is available online at: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-jul-dec-2018> > Accessed on 22 July 2021.

to benefit and/or support consumers during the National State of Disaster to be lodged with the Authority one day prior to their operation. Furthermore, licensees that were assigned with temporary spectrum were required to maintain network connectivity for virtual classroom platforms, free of charge for a period of 17 months from the date of deployment by the operator.

In order to assist with reducing the impact of the pandemic on telecommunications services and lower costs to communicate, licensees have continued to introduce various promotional products and/or services in the period under review. For example, Cell C introduced its University Bundles. Cell C's University Bundles comprises of Anytime data and Night-time data from 1GB to 400GB at prices ranging from R 25 to R 299, respectively. The MTN Work From Home/Study Bundles offer has 1-day to 30-day data only bundles, with one offering 100MB of data for R 6 and another offering 50GB for R 499. These are MTN's efforts to aid with the continuation of studying online during the COVID-19 pandemic period.

1. Introduction

In terms of the Standard Terms and Conditions for Individual Licences Regulations (*Government Gazette No. 33294*) of 2010, as amended and End-User and Subscriber Service Charter Regulations (*Government Gazette No. 39898*) of 2016, as amended, individual licensees are required to file notifications of tariffs and promotional tariffs with the Authority, seven (7) days prior to launching them in the market. The analysis contained in this report is based on prepaid tariffs that were filed in accordance with the aforementioned Regulations and also regulations 4(3) and 4(4) of the ICT COVID-19 National Disaster Regulations, 2020, and regulation 4 of the ICT COVID-19 National Disaster Fifth Amendment Regulations, 2021; during the period of 01 January 2021 to 30 June 2021.

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

This report provides an update of the 2020/21 FY fourth quarter (Q4) Tariff Analysis Report, and it also highlights changes and new prepaid standard and promotional mobile voice and data plans and tariffs and month-to-month (MtM) LTE, Wi-Fi and plans and monthly Fibre-to-the-home (FTTH) packages that were filed by the different Individual Licensees during the period under review.

This report is categorised into the following sections:

- Section 2 provides an analysis of the notifications received, which are categorised into Standard prepaid data tariffs, Promotional prepaid data tariffs, Standard prepaid voice tariffs, Promotional prepaid voice tariffs, Standard prepaid integrated bundles, Promotional prepaid integrated bundles, MtM LTE and Wi-Fi tariff plans, Standard MtM FTTH tariff plans, Promotional MtM FTTH tariff plans; and

- Section 3 provides concluding remarks.

An overview of other³ prepaid tariff notifications filed during the period under review is then depicted in Annexure A and it shows that there has been competition in terms of the promotions offered by the licensees in the market. Annexure B shows prepaid promotions and tariff plans which ended during the period under review.

2. Analysis of Tariffs Notified to the Authority

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

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

The analysis of the standard and promotional prepaid data and voice tariffs is presented in sub-sections 2.1 to 2.4. Sub-section 2.5 looks at the standard and promotional prepaid integrated bundles. Sub-section 2.6 looks at LTE and Wi-Fi tariff plans offered on a MtM basis, and a brief analysis of MtM FTTH plans and offerings is provided in sub-section 2.7.

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

2.1.1. Prepaid Data plans

This sub-section provides an updated analysis and highlights changes, if any, of prepaid data plans and prices charged by the four main MNOs and Mobile Virtual

³ Other prepaid tariff notifications filed or received during the period under review which were not discussed in the main part of this report and continue to exist in the market after 30 June 2021.

Network Operators (“MVNOs”) subsequent to the 2020/21FY Q4 Bi-annual Tariff Analysis Report. Therefore, this sub-section is divided into two parts, i.e., 2.1.1.1, which shows the prepaid data prices for bundles offered by the MNOs and 2.1.1.2, which shows the prepaid data prices for bundles offered by MVNOs filed with the Authority in the period under review.

2.1.1.1. Prepaid Data Prices for bundles offered by MNOs

2.1.1.1.1. Prepaid 30-day validity period data bundle

This section shows the prices for prepaid 30-day standard data bundle offers and provides a comparative analysis of these prepaid plans which are offered by Vodacom, MTN, Cell C and Telkom Mobile, collectively referred to as MNOs. Tables 2 and 3 indicate the difference in terms of absolute value (Variance in Rands) of the data charges in terms of in-bundle (i.e., labelled normal subscription fee) plans and out-of-bundle rates (OOB) of the same volume of data (i.e., the OOB equivalent price). Also shown in the tables are prices (tariff rate) of each megabyte per volume of data, i.e., the in-bundle rates. These tables also indicate and compare price changes, if any, from the previous prices found in the 2020/21 FY Q4 Bi-annual Tariff Analysis Report, which was published on ICASA’s website on 31 March 2021⁴.

In the period under review, the Authority received an amendment notification with respect to 30-day standard prepaid data bundles from Vodacom only, which was filed on 29 March 2021. The operator’s amendment entailed the upsizing of the 150MB, 325MB data bundles, price reductions of the 325MB, 500MB and 1GB data bundles, and the reintroduction of the 2GB data bundle.

Table 2 below shows that Vodacom increased the data bundle volume of its 30-day standard prepaid plan from 150MB to 200MB while the price remained unchanged at R 29. The 325MB data bundle offered at R 55 was replaced by the

⁴ Pages 17-18, available online at: < <https://www.icasa.org.za/legislation-and-regulations/bi-annual-tariffs-analysis-report-01-jul-to-31-dec-2020> > Accessed on 07 July 2021.

350MB data bundle offered at R 49, which is priced at R 6 less than the previously offered 325MB data bundle. The price of the 500MB data bundle was reduced by R 10 or 12.7% from R 79 to R 69, while the 1GB data bundle price was reduced by R 14 or 14.1% from R 99 to R 85. Vodacom reintroduced its 30-day standard prepaid 2GB data bundle, pricing it at R 159, which is R 90 or 36.1% less than the previous price⁵ of R 249.

It should be noted that Cell C, MTN and Telkom did not file any amendments nor introduce any new data bundle offers with respect to their 30-day prepaid data bundles in the period under review. However, post review period, MTN filed an amendment on 20 July 2021 to its data bundles portfolio and Telkom Mobile also filed an amendment of its all-networks data bundle on 24 August 2021, which the Authority has been incorporated in the analysis below⁶.

⁵ It should be noted that Vodacom's previous 30-day standard prepaid 2GB offering can be found in the 2018/19FY Q4 Bi-Annual Tariff Analysis Report, which is available online at: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-jul-dec-2018> > Accessed on 22 July 2021.

⁶ It should be noted that MTN and Telkom Mobile's amendment to its data bundles portfolios, was incorporated into the report even though it does not fall within the period under review, in order to ensure that the report is not retrospective, it was imperative that such significant amendments be incorporated in the report to reflect prevailing data prices in the market.

Table 2: Prepaid Data Bundle Standard Prices and OOB Equivalent Prices for Vodacom and MTN

Bundle Size (MB)	Vodacom						MTN					
	Previous (2020/21 FY Q4) Normal Price	Current Normal Price	OOB Equivalent Price (R 0.49 per MB)	Variance in Rands (OOB Equivalent v/s Current Price)	Variance (%) Previous v/s Current Price	Tariff rate per MB	Previous (2020/21 FY Q4) Normal Price	Current Normal Price	OOB Equivalent Price (R 0.49 per MB)	Variance in Rands (OOB Equivalent v/s Price)	Variance (%) Previous v/s Current Price	Tariff rate per MB
50	R 12	R 12	R 24.50	R 12.50	0%	R 0.24	R 10 (40MB)	R 10 (40MB)	R 20	R 10	0%	R 0.25
100	N/A						R 20	R 20	R 49	R 29	0%	R 0.20
150	R 29	Discontinued					R 29	Discontinued				
200	N/A	R 29	R 98	R 69	0.0%	R 0.15	R 39	R 29	R 98	R 69	-25.6%	R 0.15
350	R 55 (325MB)	R 49	R 171.50	R 122.50	-10.9%	R 0.14	R 60	R 49	R 172	R 122.50	-18.3%	R 0.14
500	R 79	R 69	R 245	R 176	-12.7%	R 0.14	R 75	R 69	R 245	R 176	-8%	R 0.14
750	N/A						R 89	Discontinued				
1024	R 99	R 85	R 501.76	R 416.76	-14.1%	R 0.08	R 99	R 85	R 502	R 416.76	-14.1%	R 0.08
1536	N/A						R 149	R 99	R 753	R 653.64	-33.6%	R 0.06
2048	N/A	R 159	R 1 003.52	N/A	N/A	R 0.08	R 189	R 149**	R 1 004	R 854.52	-21.2%	R 0.07
3072	R 229	R 229	R 1 505.28	R 1 276.28	0%	R 0.07	R 299	R 199**	R 1 505	R 1 306.28	-33.4%	R 0.06
5120	R 349	R 349	R 2 508.80	R 2 159.80	0%	R 0.07	N/A	R 299**	R 2 509	R 2 209.80	N/A	R 0.06
6144	N/A						R 399	R 349**	R 3 011	R 2 661.56	-12.5%	R 0.06
10240	R 469	R 469	R 5 017.60	R 4 548.60	0%	R 0.05	R 469	R 469	R 5 018	R 4 548.60	0.0%	R 0.05
20480	R 699	R 699	R 10 035.20	R 9 336.20	0%	R 0.03	R 699	R 599**	R 10 035	R 9 436.20	-14.3%	R 0.03
51200	R 1 499	R 1 499	R 25 088	R 23 589	0%	R 0.03	R 1 499	R 799**	R 25 088	R 24 289	-46.7%	R 0.02
102400	R 2 399	R 2 399	R 50 176	R 47 777	0%	R 0.02	R 2 499	R 999**	R 50 176	R 49 177	-60%	R 0.01

*As per regulation 8B of the End-User and Subscriber Service Charter Regulations 2019, Licensees must not permit any out-of-bundle data usage by an end-user until such time that an end-user purchases new data bundles or opt-in to out-of-bundle usage.

** These MTN prepaid data bundles offer customers additional Night Express data bundles which can be used at night between 12am to 5am

Source: ICASA Database based on Tariff Notifications. N/A means not offered/cannot be calculated

Table 3: Prepaid Data Bundles Standard Prices and OOB Equivalent Prices for Cell C and Telkom Mobile

Bundle Size (MB)	Current Price	Cell C			Telkom Mobile			
		OOB Equivalent Price (R1.10/MB)	Variance in Rands (OOB Equivalent v/s Price)	Tariff rate per MB	Current Price	OOB Equivalent Price (R 0.30/MB)	Variance in Rands (OOB Equivalent v/s Price)	Tariff rate per MB
35	R 10 (40MB)	R 44	R 34	R 0.25	R 7**	R 10.50	R 3.50	R 0.20
75	R 15 (80MB)	R 88	R 73	R 0.19	R 14**	R 22.50	R 8.50	R 0.19
150	R 29	R 165	R 136	R 0.19	R 29**	R 45	R 16	R 0.19
250	R 35	R 275	R 240	R 0.14	N/A			
300	R 49 (325MB)	R 358	R 309	R 0.15	R 49**	R 90	R 41	R 0.16
500	R 80 (800MB)	R 880	R 800	R 0.10	R 69**	R 150	R 81	R 0.14
1024	R 95**	R 1 126.40	R 1 031.40	R 0.09	R 79**	R 307.20	R 228.20	R 0.08
1536	R 149**	R 1 689.60	R 1 540.60	R 0.10	R 89**	R 460.80	R 371.80	R 0.06
2048	R 199**	R 2 252.80	R 2 053.80	R 0.10	R 139**	R 614.40	R 475.40	R 0.07
3072	R 249**	R 3 379.20	R 3 130.20	R 0.08	R 199**	R 921.60	R 722.60	R 0.06
5120	Discontinued				R 299**	R 1 536	R 1 237	R 0.06
6144	R 299**	R 6 758.40	R 6 459.40	R 0.05	N/A			
10240	R 499**	R 11 264	R 10 765	R 0.05	R 469**	R 3 072	R 2 603	R 0.05
20480	R 799	R 22 528	R 21 729	R 0.04	R 699	R 6 144	R 5 445	R 0.03
51200	R 1 199 (40GB)	R 56 320	R 55 121	R 0.02	R 1 499	R 15 360	R 13 861	R 0.03
102400	R 2 999	R 112 640	R 109 641	R 0.03	R 2 499	R 30 720	R 28 221	R 0.02

**These Cell C and Telkom Mobile prepaid data bundles offer customers additional night data which can be used at night between 12am to 5am and 12am to 7am, respectively

Source: ICASA Database based on Tariff Notifications. N/A means not offered/cannot be calculated

Tables 2 and 3 above shows that Vodacom and MTN charge the least on the 150MB to 200MB range of data bundles, both with an in-bundle rate (i.e., tariff rate per megabyte) of R 0.15 per MB, while Cell C and Telkom have an in-bundle rate of R 0.19 per MB.

Vodacom and MTN also charge the lowest on the 300MB to 350MB data bundle range as they offer their respective 350MB data bundles for R 49, which can be translated to a R 0.14 per MB in-bundle rate. Cell C offers its 325MB data bundle for R 49, which can be translated to a R 0.15 per MB in-bundle rate. Telkom Mobile offers its 300MB data bundle for R 49, therefore its in-bundle rate of R 0.16 per MB is the highest on the 300MB to 350MB data bundle range.

Vodacom, MTN and Telkom Mobile offer their respective 30-day standard prepaid 500MB data bundles priced at R 69 (i.e., R 0.14 in-bundle rate). It should be noted that Cell C does not offer the 500MB data bundle, however it offers a 800MB data bundle for R 80, with the lowest in-bundle rate of R 0.10 per MB on the 500MB to 800MB data bundle range.

Currently, Telkom Mobile offers the most affordable 30-day standard prepaid 1GB data bundle, priced at R 79, followed by Vodacom and MTN who both offer their customers the second most affordable 30-day standard prepaid 1GB data bundles, priced at R 85 (i.e., R 0.08 per MB in-bundle rate). Cell C offers the least affordable 1GB data bundle at R 95 (i.e., R 0.09 per MB).

In the period under review, Vodacom reintroduced its 30-day standard prepaid 2GB data bundle which is priced at R 159; therefore, it has an in-bundle rate of R 0.08 per MB. However, Telkom Mobile still offers the most affordable 2GB data bundle priced at R 139 which translates to R 0.07 per MB in-bundle rate, therefore Vodacom charges 14.4% more than Telkom Mobile. MTN's amendment of its prepaid data bundle portfolio which was filed with the Authority on 20 July 2021 saw its standard prepaid 30-day 2GB data bundle price been reduced by R 40 or 21.2%, from R 189 to R 149, which resulted in an in-bundle rate is R 0.07 per MB. Cell C offers the least affordable prepaid 30-day 2GB data bundle, as it is priced at R 199, with an in-bundle rate of R 0.10 per MB.

MTN's 30-day standard prepaid 3GB data bundle was reduced by R 100 or 33.4% from R 299 to R 199, making it the most affordable 3GB data bundle along with Telkom Mobile, with their respective in-bundle rates at R 0.06 per MB. Cell C and MTN offer their 30-day prepaid 3GB data bundles at R 229 and R 249, with in-bundle rates at R 0.07 per MB and R 0.08 per MB, respectively.

MTN introduced a 30-day standard prepaid 5GB data bundle, priced at R 299, which is same amount as Telkom Mobile's 5GB data bundle, therefore their respective in-bundle rates are R 0.06 per MB. Cell C does not offer the 5GB data bundle, however it offers 6GB of data for R 299, making it the cheapest data bundle offer in the 5GB to 6GB data bundle range. Vodacom charges the most for the 5GB data bundle, as it is priced at R 349, with an in-bundle rate of R 0.07 per MB.

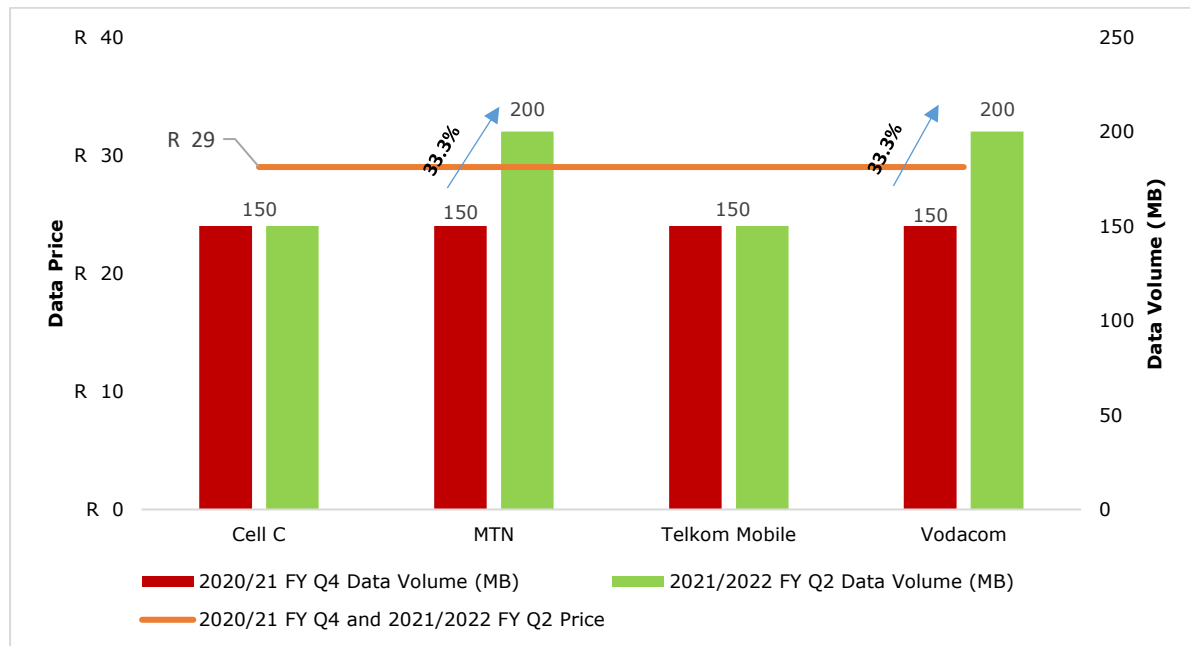
MTN's 30-day standard prepaid 20GB was reduced by R 100 or 14.3%, from R 699 to R 599, making it the most affordable 20GB data bundle among the four operators. Telkom Mobile and Vodacom both offer their respective 20GB data bundles for R 699. Cell C offers its 20GB data bundle at R 799, making it the least affordable 20GB data bundle among the four operators, and it is R 200 or 33.4% more than MTN's 20GB data bundle.

MTN also reduced its 30-day standard prepaid 50GB by R 700 or 46.7%, from R 1 499 to R 799, making it the most affordable 50GB data bundle among the four operators. Telkom Mobile and Vodacom both offer their respective 50GB data bundles for R 1 499. Cell C does not offer the 50GB data bundle, however, it offers 40GB at R 1 199.

MTN also reduced its 30-day standard prepaid 100GB by R 1 500 or 60%, from R 2 499 to R 999. Therefore, MTN offers the most affordable 100GB data bundle among the four operators. Vodacom, Telkom Mobile and Cell C offer their respective 100GB data bundles at R 2 399 (140.1% more), R 2 499 (or 150.1% more), R 2 999 (200.2% more), respectively.

Figures 1 to 3 depict changes that happened on the 150MB and 200MB range, 500MB and 1GB 30-day standard prepaid data bundles, respectively, since the 2020/21 FY Q4 Bi-Annual Report.

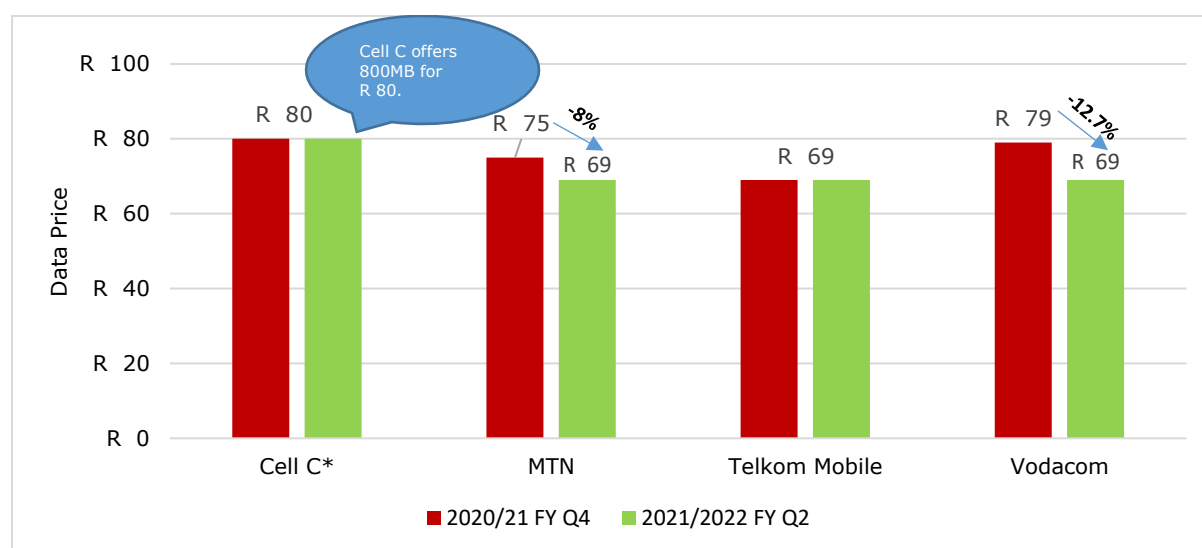
Figure 1: Changes on 150MB and new 200MB standard 30-day prepaid data bundles



Source: ICASA Database Based on Tariff Notifications

In the period under review only Vodacom filed an amendment to its 150MB prepaid data bundle wherein it upsized it by 50MB while the price remained unchanged at R 29. Therefore, this translated to a decrease in the in-bundle rate from R 0.19 per MB to R 0.15 per MB. MTN also amended its 200MB data bundle price from R 39 to R 29, therefore the in-bundle rate decreased from R 0.20 per MB to R 0.15 per MB. Cell C and Telkom Mobile offer their respective 150MB data bundles at R 29.

Figure 2: Data Price changes for 500MB standard 30-day prepaid data bundles

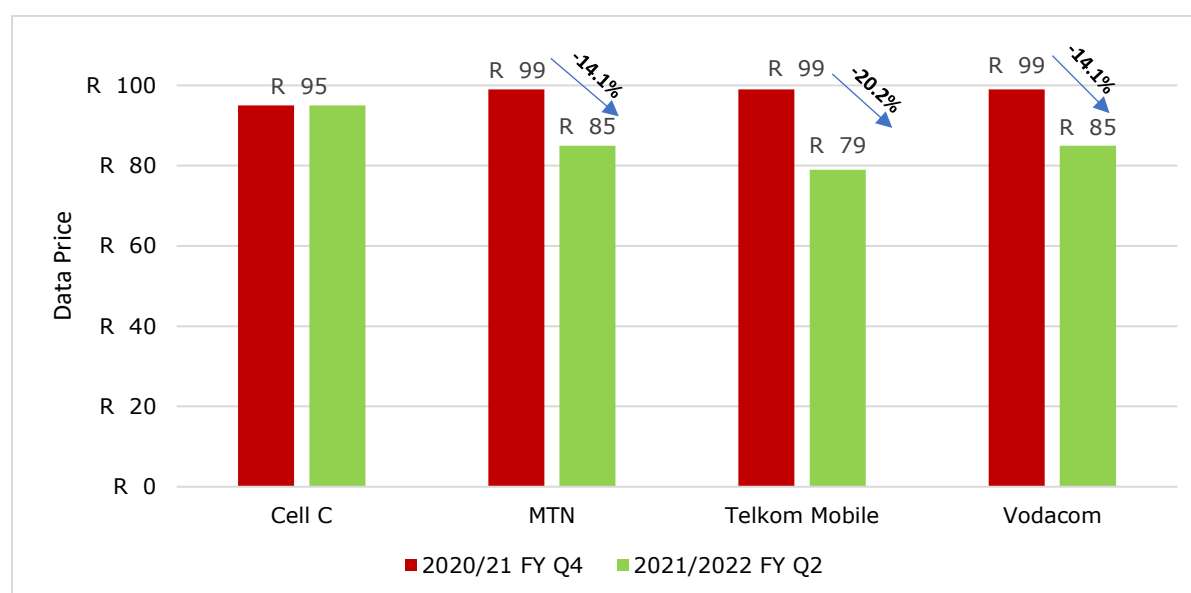


*Cell C does not offer the 500MB data bundle, however it offers 800MB for R 80.

Source: ICASA Database Based on Tariff Notifications

Figure 2 above depicts that Vodacom amended the price of its 500MB data bundle, by reducing it by 12.7% from R 79 to R 69, which can be translated to an in-bundle rate of R 0.14 per MB. MTN's price adjustment of its 500MB data bundle, which followed suit to Vodacom's is also illustrated in the figure above, wherein the price was reduced by R 6 or 8% from R 75 to R 69. Thus, Vodacom, MTN and Telkom Mobile all offer their respective 500MB standard 30-day prepaid data bundle for R 69. Cell C does not offer 500MB on its 30-day standard prepaid bundles, however it offers 800MB for a price of R 80, which relatively translates to the lowest in-bundles rate of R 0.10 per MB, if compared to in-bundle rates which are offered by the MNOs for their respective 500MB standard 30-day prepaid data bundles.

Figure 3: Data Price changes for 1GB standard 30-day prepaid data bundles



Source: ICASA Database Based on Tariff Notifications

Figure 3 above shows data price changes for 1GB standard 30-day prepaid data bundles. Telkom Mobile filed an amendment of their standard 30-day prepaid 1GB data bundle, on 24 August 2021, which saw a price decrease of 20.2% from R 99 to R 79, this made its offer the most affordable 1GB prepaid data bundle amongst the four operators. Vodacom and MTN have also reduced the prices of their 1GB data bundles by 14.1%, from R 99 to R 85. Cell C did not file any amendment with respect to their 1GB data bundles in the period under review, and their 1GB bundles are offered at R 95.

Table 4 below shows a summary of the salient changes that the Authority has observed for the standard 30-day prepaid data bundles between the 2020/21 FY Q4 Bi-Annual Tariff Analysis Report and the 2021/22 FY Q2 Bi-Annual Tariff Analysis Report.

Vodacom increased the data volumes of its 150MB data bundles by 33.3% to 200MB whilst keeping their prices unchanged at R 29, which translates to a R 0.15 per MB in-bundle rate. The operator also reduced the prices of its 500MB and 1GB data bundles by 12.7% and 14.1% and are currently priced at R 69 and R 85, respectively.

Table 4: 2020/21 FY Q4 to 2021/22 FY Q2 Salient Changes to 30-day Standard Prepaid Data Bundles

Licensee	2020/21 FY Q4 Bi-annual Tariff Analysis Report	2021/22 FY (Current ⁷ Q2 Bi-annual Tariff Analysis Report)	Changes since previous Bi-annual Tariff Analysis Report ⁸
Vodacom	150MB priced at R 29, with an in-bundle rate of R 0.19 per MB.	Introduced a 200MB data bundle for R 29, with an in-bundle rate of R 0.15 per MB.	33.3% more data volume → 25% less in-bundle rate.
	500MB priced at R 79, with an in-bundle rate R 0.16 per MB.	Reduced the price of 500MB data bundle to R 69, which lowered the in-bundle rate to R 0.14 per MB.	Priced at 12.7% less → 12.7% lower in-bundle rate.
	1GB priced at R 99, with an in-bundle rate R 0.10 per MB.	Reduced the price of 1GB data bundle to R 85, which lowered the in-bundle rate to R 0.08 per MB.	Priced at 14.1% less → 14.1% lower in-bundle rate.
MTN	200MB priced at R 39, with an in-bundle rate of R 0.20 per MB.	Reduced the price of 200MB data bundle to R 29, which lowered the in-bundle rate to R 0.15 per MB.	Priced at 25.6% less → 25.6% lower in-bundle rate.
	500MB data bundle price at R 75, with an in-bundle rate of R 0.15 per MB.	Reduced the price of 500MB data bundle to R 69, which lowered the in-bundle rate to R 0.14 per MB.	Priced at 8% less → 8% lower in-bundle rate.
	1GB data bundle price at R 99, with an in-bundle rate to R 0.10 per MB.	Reduced the price of 1GB data bundle to R 85, which lowered the in-bundle rate to R 0.08 per MB.	Priced at 14.1% less → 14.1% lower in-bundle rate.
	3GB data bundle price at R 299, with an in-bundle rate of R 0.10 per MB.	Reduced the price of 3GB data bundle to R 199, with a new in-bundle rate of R 0.06 per MB.	Priced at 33.4% less → 33.4% lower in-bundle rate.
	N/A	Introduced a 5GB data bundle for R 299, with an in-bundle rate of R 0.06 per MB.	New 5GB data bundle offered, which together with Telkom's 5GB are the most affordable when compared to other MNOs.
	20GB data bundle priced at R 699, with an in-bundle rate of R 0.03 per MB.	Reduced the price of 20GB data bundle to R 599, with an in-bundle rate of R 0.03 per MB.	Priced at 14.3% less → 14.3% lower in-bundle rate.
	50GB data bundle priced at R 1 499, with an in-bundle rate of R 0.03 per MB.	Reduced the price of 50GB data bundle to R 799, with an in-bundle rate of R 0.02 per MB.	Priced at 46.7% less → 46.7% lower in-bundle rate.
	100GB data bundle priced at R 2 499, with an in-bundle rate of R 0.02 per MB.	Reduced the price of 100GB data bundle to R 999, with an in-bundle rate of R 0.01 per MB.	Priced at 60% less → 60% lower in-bundle rate.
Telkom Mobile	1GB data bundle price at R 99, with an in-bundle rate to R 0.10 per MB.	Reduced the price of 1GB bundle to R 79, which lowered the in-bundle rate to R 0.08 per MB.	Priced at 20.2% less → 20.2% lower in-bundle rate.
	N/A	Introduced a 1.5GB data bundle for R 89, with an in-bundle rate of R 0.06 per MB.	New 1.5GB data bundle offered, which is most affordable when compared to other MNOs.

Source: ICASA Database based on Tariff Notifications

⁷ Q2 (quarter 2) is as per the review period for the production and publication of this report, so changes are as of 30 June 2021 and not aligned to the financial year end of Q2 which is 30 September 2021.

⁸ Available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/bi-annual-tariffs-analysis-report-01-jul-to-31-dec-2020> > Accessed on 30 June 2021

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

2.1.1.1.2.1. Cell C Daily Data Bundles and 7-Day Data Bundles

Cell C's amendment of its Daily Data Bundles and 7-Day Data Bundles was filed with the Authority on 16 February 2021, wherein it introduced new data bundles for its Base 7-Day Bundle and WhatsApp Booster 7-Day Promotional Bundle. The new bundles are available to all prepaid, post-paid and top-up/hybrid customers.

Table 5 below shows the prices for additional Daily data bundles, as well as the 7-Day data bundles which customers will be eligible to purchase, as an add-on subject to having purchased an equivalent Base 7-Day bundle as was analysed in the 2020/21 Q4 Bi-Annual Tariff Analysis Report.⁹

Table 5: Cell C's additional Daily Data Bundles and 7-Day Data Bundles

Base Data Bundle	Price	Tariff rate per MB	Validity period
25MB	R 4	R 0.16	Daily
20MB	R 4	R 0.20	7 days
65MB	R 9	R 0.14	Daily
55MB	R 9	R 0.16	7 days
80MB	R 11	R 0.14	Daily
70MB	R 11	R 0.16	7 days
120MB	R 14	R 0.12	Daily
140MB	R 14	R 0.10	7 days
600MB	R 19	R 0.03	Daily
200MB	R 19	R 0.10	7 days
1GB	R 28	R 0.03	Daily
400MB	R 28	R 0.07	7 days
WhatsApp Booster 7-Day Promotional Bundle			
	Price	Tariff rate per MB	Validity period
100MB	R 4	R 0.04	7 days
275MB	R 9	R 0.03	7 days
350MB	R 11	R 0.03	7 days
500MB	R 14	R 0.03	7 days
750MB	R 19	R 0.03	7 days
1200MB	R 28	R 0.02	7 days

Source: ICASA Database Based on Tariff Notifications

⁹ Page 24, available on ICASA's website: <https://www.icasa.org.za/legislation-and-regulations/bi-annual-tariffs-analysis-report-01-jul-to-31-dec-2020>> Accessed on 30 June 2021

Cell C's additional Daily Data Bundles benefit customers with lower in-bundle rates when compared to competitors. For example, Vodacom's Just 4 You 250MB daily bundle is priced at R 19 with an in-bundle rate of R 0.08, while Cell C's 600MB daily data bundle is priced at R 19 with an in-bundle rate of R 0.03, which offers customers more value. It is worth noting that Cell C's Daily Data and 7-Day Data Bundles can be transferred to other customers who are on Cell C's network as per the data transfer terms and conditions on Cell C's website¹⁰.

Cell C's additional 7-Day data bundles and WhatsApp Booster 7-day bundles were introduced in the market on 17 February 2021.

2.1.1.1.2.2. Cell C University Bundles

Cell C's University Bundles was initially filed with the Authority on 18 February 2021, bearing the name "Cell C University Student Data Bundles". On 12 March 2021, Cell C filed another notification which renamed the plan as "Cell C University Bundles", effective 16 March 2021. The University Bundles are aimed at assisting with ensuring that there is a continuation of online learning during the COVID-19 pandemic period. The Cell C University Bundles comprises of four offerings which offer 30GB (10GB Anytime data and 20GB Nite data) of data each at prices which range from R 65 to R 130. The Cell C University Bundles is available to customers through their university of study and the selected learning data bundle is provisioned on the student's cell phone number. The selected learning data bundle value is valid for 30 days from allocation and can be used for any internet access.

Table 6 below sets out the data offered, pricing and validity of the Cell C University Bundles.

Table 6: Cell C's University Bundles

New Name	Anytime Data	Night Data	Price	Tariff rate per GB (inclusive of night data)
Learning Bundle 1GB	1GB	N/A	R 25	R 25
Learning Bundle 3GB	1GB	2GB	R 30	R 10

¹⁰ Available on: < <https://www.cellc.co.za/cellc/bundles-contract-detail/seven-day-bundles#/additional-info-content> > Accessed on 13 July 2021

Learning Bundle 2GB	2GB	N/A	R 45	R 22.50
Learning Bundle 7GB	2GB	5GB	R 55	R 7.90
Learning Bundle 5GB	5GB	N/A	R 90	R 18
Learning Bundle 15GB	5GB	10GB	R 105	R 7
Learning Bundle 10GB	10GB	N/A	R 110	R 11
Learning Bundle 20GB	20GB	N/A	R 200	R 10
Learning Bundle 30GB (Wits University)	10GB	20GB	R 65	R 2.17
Learning Bundle 100GB	100GB	100GB	R 199	R 1
Learning Bundle 200GB	200GB	200GB	R 299	R 0.75
Learning Bundle 30GB	10GB	20GB	R 130	R 4.33
Learning Bundle 30GB (Non-NSFAS Students)	20GB	10GB	R 99	R 3.30
Learning Bundle 30GB (NSFAS Students)	10GB	20GB	R 65	R 2.17

Source: ICASA Database Based on Tariff Notifications

As shown on the table above, Cell C's University Bundles offer customers who are NSFAS Students a lower price of R 65 for 30GB than other categories of non-NSFAS customers. Cell C's University Bundles benefit customers with a lower price when compared to competitors. For example, MTN's Work From Home/Study Bundles offers a 10GB monthly data bundle priced at R 139, while the Cell C 10GB Learning data bundle is priced at R 110, which is 20.9% less than what MTN offers, this means that Cell C's 10GB Learning data bundle offers University students more value for money.

The amendment of the Cell C University Bundles became effective on 16 March 2021.

2.1.1.1.2.3. MTN Rush Hour and Daily Data Bundles

MTN's amendment to its Rush Hour and Daily Data Bundles was filed with the Authority on 19 February 2021. The previous notification regarding the Data Bundles Portfolio amendment was filed with the Authority on 20 February 2018. The recent, 2021 amendment entailed a tariff reduction of data bundles and the introduction of new hourly and daily data bundles. Table 7 below details the amendment of the hourly and daily data bundles.

Table 7: Rush Hour and Daily Data Bundles

Bundle Type	Previous Price (Incl. VAT)	New Price (Incl. VAT)	Price Difference	Price Difference (%)
1GB Hourly	R 30	R 12	-R 18	-60%
300MB Daily	R 27	R 20	-R 7	-25.9%

1GB Daily	R 50	R 29	-R 21	-42%
20MB Hourly	N/A	R 2	N/A	N/A
100MB Hourly		R 5		
500MB Hourly		R 8		
30MB Daily		R 5		
100MB Daily		R 10		
200MB Daily		R 15		
3GB Daily		R 50		

Source: ICASA Database based on Tariff Notifications

Table 7 above shows that the 1GB hourly data bundle had the largest decrease in percentage terms of 60% (or R 18), from R 30 to R 12. MTN's 1GB daily data bundle realised the largest tariff decrease in absolute value terms, decreasing by R 21 from R 50 to R 29.

Compared to Vodacom's daily data, MTN offers customers more value for money, with its 300MB priced at R 20 (R 0.07 per MB in-bundle rate) while Vodacom offers 250MB for R 27 (R 0.11 per MB in-bundle rate). MTN's new daily 100MB priced at R 10 (R 0.10 per MB in-bundle rate) is also more affordable when compared to Vodacom's 100MB which is priced at R 15 (R 0.15 per MB). Thus, MTN's daily 100MB price is 33.3% less than Vodacom's.

On the other hand, despite MTN's efforts to make its data bundles more affordable, it still does not offer the most affordable bundles, for instance Cell C still offers the cheapest daily 1GB data bundle. Cell C currently prices its 1GB at R 20, while MTN offers it at R 29, which is 45% more than Cell C's price.

MTN's amendment to its Rush Hour and Daily Data Bundles was filed in terms of the ICT COVID-19 National Disaster Regulations, 2020, and therefore came to effect on 23 February 2021.

2.1.1.1.2.4. FNB Connect Data Bundles

The amendment of the FNB Connect Data Bundles was filed with the Authority on 07 April 2021. The amendment entailed price reductions as well as the addition of new once-off and recurring data packages.

Table 8 below details the amendments to the FNB Connect Data Bundles.

Table 8: FNB's amendment to its Connect Data Bundles

Once-Off and Recurring Bundles					
Bundle Name	Data Volume	Previous price	New price	Difference	Variance (%)
20GB (30 Days)	20GB	R 939	R 849	-R 90	-9.6%
30GB (30 Days)	30GB	N/A	R 1 149	N/A	N/A
50GB (30 Days)	50GB	N/A	R 1 899	N/A	N/A
100GB (30 Days)	100GB	N/A	R 3 399	N/A	N/A
Recurring Bundles					
20GB (30 Days)	20GB	R 939	R 849	-R 90	-9.6%
30GB (30 Days)	30GB	N/A	R 1 149	N/A	N/A
50GB (30 Days)	50GB	N/A	R 1 899	N/A	N/A
100GB (30 Days)	100GB	N/A	R 3 399	N/A	N/A

Source: ICASA Database Based on Tariff Notifications

The table above shows that there were price adjustments on FNB Connect's Data Bundles, for the 20GB once-off and recurring data packages as both were decreased by 9.6% or R 90 in absolute terms from R 939 to R 849, which results in more value for money to customers who purchase either of these data bundles. FNB Connect's Recurring 50GB bundle is priced at R 1 899 which is 26.7% higher than Vodacom's 50GB on the 30-Day Prepaid Recurring Bundles which is priced at R 1 499.

The amendments to FNB Connect Data Bundles were filed according to the ICT COVID-19 National Disaster Regulations and became effective on 18 April 2021.

2.1.1.1.2.5. Vodacom Just 4 You Bundles

The Authority received two notifications regarding Vodacom's Just 4 You Bundles in the period under review, wherein it revised the plan by introducing more data bundles. The first notification was filed on 12 April 2021, followed by another amendment on 15 June 2021, as shown in table 9 below.

Table 9: Vodacom Just 4 You Bundles

Offer Description	Validity	Inclusive Value	Free Allocation	Total Value	Price (Incl. VAT)	In-bundle Rate (Rand per MB)
12 April 2021 Notification						
350MB + 150MB Free	7 days	350MB	150MB	500MB	R 45	R 0.09

for 7 days R 45						
1GB for 7 days at R 70	7 days	1GB	-	1GB	R 70	R 0.07
250MB for today at R 19	1 day	250MB	-	250MB	R 19	R 0.08
15 June 2021 Notification						
50MB for 3 days at R 7	3 days	50MB	-	50MB	R 7	R 0.14
1GB + 1GB for 30 days at R 85	30 days	1GB	1GB	2GB	R 85	R 0.04

Source: ICASA Database based on Tariff Notifications

The table above shows that the 7-day 350MB data bundle priced at R 45 comes with a free additional 150MB, thus customers receive a total of 500MB. The 30-day 1GB also has a free additional 1GB data bundle, meaning customers receive a total of 2GB of data to use at a price of R 85. Just 4 You bundles can be purchased via the *123# USSD code and Vodacom varies its Just 4 You offers as it deems necessary.

Vodacom's Just 4 You Bundles benefit customers with lower in-bundle rates when compared to the standard weekly data bundles. For example, Vodacom's new weekly Just 4 You 1GB data bundle, has an in-bundle rate of R 0.07 per MB, while the weekly 1GB standard data bundle is priced R 80 which translates to a R 0.08 per MB in-bundle rate. A comparison can also be made between the weekly and monthly 1GB Just 4 You bundles. Customers receive more value for money when purchasing the monthly 1GB data bundle as customers are rewarded with a free additional 1GB, which translates to a R 0.04 per MB in-bundle rate. Thus, the weekly Just 4 You 1GB data bundle has an in-bundle rate which is R 0.04 higher than the monthly Just 4 You 1GB data bundle.

The notification filed on 12 April 2021 was filed in terms of the ICT COVID-19 National Disaster Regulations, 2020, and came to effect on 13 April 2021, while the notification filed on 15 June 2021 came to effect on 25 June 2021.

2.1.1.1.2.6. Vodacom 30-Day Prepaid Recurring Bundles

Vodacom filed its 30-Day Prepaid Recurring Bundles with the Authority on 16 April 2021, wherein it introduced new 30-Day recurring data bundles available to prepaid customers as shown in table 10 below.

Table 10: Vodacom 30-Day Prepaid Recurring Bundles

Description	Validity	Bundle Allocation	Bundle Allocation (MB)	Price (Incl. VAT)
240MB every month at R 29	30 days	240MB	240	R 29
420MB every month at R 49	30 days	420MB	420	R 49
600MB every month at R 69	30 days	600MB	600	R 69
1.2GB every month at R 85	30 days	1.2GB	1229	R 85
3.6GB every month at R 229	30 days	3.6GB	3686	R 229
6GB every month at R 349	30 days	6GB	6144	R 349
12GB every month at R 469	30 days	12GB	12288	R 469
24GB every month at R 699	30 days	24GB	24576	R 699
50GB every month at R 1 499	30 days	50GB	51200	R 1 499
100GB every month at R 2 399	30 days	100GB	102400	R 2 399

Source: ICASA Database based on Tariff Notifications

Vodacom's 30-Day Prepaid Recurring Bundles benefits customers with more value for money when compared to standard 30-day prepaid data. For example, Vodacom offers its 30-day 500MB prepaid data bundle for R 69 (i.e., R 0.14 per MB), while the 30-Day 600MB prepaid recurring bundle which is 100MB more data is also offered at same monetary value (i.e., R 0.12 per MB). This translates to a R 0.02 in-bundle rate differential. Vodacom offers its 30-day 1GB prepaid data bundle for R 85 (i.e., R 0.08 per MB), while for the same monetary value, it offers a 30-Day 1.2GB prepaid recurring bundle with an in-bundle rate of R 0.07 per MB. This translates to a R 0.01 in-bundle rate differential.

Vodacom introduced its 30-Day Prepaid Recurring Bundles in the market on 20 April 2021.

2.1.1.1.2.7. Rain One Plan

Rain filed an amendment to its One Plan with the Authority on 19 April 2021. The amendment entailed the removal of the option to purchase unlimited off-peak data for R 250 on the plan, this change negatively affects customers as it limits their choice and access to unlimited off-peak data.

The amendment of the Rain One Plan became effective on 26 April 2021.

2.1.1.1.2.8. MTN Personalised Monthly Data Bundles

On 30 April 2021, MTN amended the prices of the data bundles that it offers in its prepaid Personalised Monthly Data plan. The preceding notification with respect to the plan was filed with the Authority on 28 August 2020 and 04 December 2019. A sample¹¹ of the revised data bundles is shown in table 11 below.

Table 11: MTN Personalised Monthly Data Bundles

Personalised Bundle Name	Previous Price	New Price (Incl. VAT)	Price Difference	Variance (%)
40MB	R 5	R 10	R 5	100%
	R 10		R 0	0%
100MB	R 12	R 20	R 8	66.7%
	R 15		R 5	33.3%
200MB	R 25	R 29	R 4	16%
	R 29		R 0	0%
	R 35		-R 6	-17.1%
	R 39		-R 10	-25.6%
350MB	R 39	R 49	R 10	25.6%
	R 55		-R 6	-10.9%
	R 60		-R 11	-18.3%
500MB	R 60	R 69	R 9	15%
	R 75		-R 6	-8%
1GB	R 89	R 85	-R 4	-4.5%
1.5GB	R 149	R 99	-R 50	-33.6%
2GB	R 149	R 149	R 0	0%
	R 169		-R 20	-11.8%
3GB	R 150	R 189	R 39	26%
5GB	N/A	R 299	N/A	N/A
6GB	R 200	R 349	R 149	74.5%
10GB	R 250	R 469	R 219	87.6%
30GB	R 650	R 599	-R 51	-7.8%
50GB	R 1 000	R 699	-R 301	-30.1%
100GB	R 1 750	R 999	-R 751	-42.9%

Source: ICASA Database based on Tariff Notifications

As shown in the table above, most bundles were offered to selected customers at varying prices according to their spending profiles. For example, selected customers were offered the 30-day 500MB data bundle for R 60 or R 75, which is now offered at R 69. The 1GB data bundle realised a R 4 or 4.5% tariff decrease from R 89 to R 85. However, other packages like the 100MB data bundle, for example, realised a tariff increase of R 8 (or 66.7%) from R 12 to R 20, or R 5 (or 33.3%) from R 15 to R 20, which is to the detriment of customers.

¹¹ More information regarding this offer and its terms and conditions can be obtained from the operator's website which is available online at: < <https://www.mtn.co.za/Pages/Termsandconditions.aspx?pageID=881> > Accessed on 09 July 2021.

It should be noted that these personalised data bundles cannot be shared, and customers cannot roll over unused data by purchasing another data bundle. MTN's amendment was filed in terms of the ICT COVID-19 National Disaster Regulations and came to effect on 05 May 2021.

2.1.1.1.2.9. MTN Everyday Gigs Bundles

MTN filed an amendment to its Everyday Gigs Bundles with the Authority on 03 May 2021, wherein it added the 3-day validity period, introduced new data bundles and adjusted prices for selected data bundles.

The prepaid Everyday Gigs Bundles plan was initially filed with the Authority on 20 May 2020. The price plan offers daily, weekly and monthly prepaid data and personalised prepaid data bundles. It allows customers to pay a certain amount of money up-front, per week or per month in exchange for a weekly or monthly data allocation which occurs every day. A daily allocation is valid for use on that same day. Table 12 below details the amendment to MTN's Everyday Gigs Bundles.

Table 12: Amendment and new bundles of the MTN Everyday Gigs Bundles

Validity	Total Data Allocation	Daily Allocation	Previous Price	New Price	Price Difference	Variance (%)
Daily	3GB	3GB	-	R 50	N/A	N/A
3 Days	3GB	1GB	-	R 69	N/A	N/A
	6GB	2GB	-	R 99	N/A	N/A
	9GB	3GB	-	R 129	N/A	N/A
7 Days	7GB	1GB	R 149	R 99	-R 50	-33.6%
	14GB	2GB	R 199	R 179	-R 20	-10.1%
	21GB	3GB	-	R 249	N/A	N/A
Monthly	30GB	1GB	R 499	R 349	-R 150	-30.1%
	60GB	2GB	R 699	R 499	-R 200	-28.6%
	90GB	3GB	-	R 699	N/A	N/A

Source: ICASA Database based on Tariff Notifications

Table 12 above shows that MTN added new 3-day data bundles ranging from 3GB to 9GB of total data allocation. Customers opting for the 3-day 3GB, for example, are allocated 1GB per day for 3 days at a price of R 69. The largest tariff decrease in percentage terms was realised on the 7-day 7GB, decreasing by 33.6% (or R 50) from R 149 to R 99. The monthly 60GB data bundle allocation realised the

largest tariff decrease in absolute value terms, decreasing by R 200 (or 28.6%) from R 699 to R 499.

The amendment was filed according to the ICT COVID-19 National Disaster Regulations and came to effect on 05 May 2021.

2.1.1.1.2.10. MTN Hourly, Weekly and Fortnightly Data Bundles

MTN revised its data bundles portfolio on 18 May 2021, by reducing the price of the 14-day 1GB data bundle and adding data hourly, weekly and fortnightly data bundles. Table 13 below details the amendment to MTN's data bundles portfolio.

Table 13: MTN Data Bundles Portfolio

Bundle Name	Validity Period	Current Price (Incl. VAT)	New Price (Incl. VAT)	Price Difference	Variance (%)
1GB	14 days	R 110	R 79	-R 31	-28.2%
1.5GB	14 days	-	R 110	N/A	N/A
20MB	7 days	-	R 5	N/A	N/A
5MB	1 hour	-	R 1	N/A	N/A

Source: ICASA Database based on Tariff Notifications

Table 13 above shows that the 14-day 1GB data bundle realised a R 31 or 28.2% tariff decrease from R 110 to R 79, which can be translated to a decrease in the in-bundle rate from R 0.11 per MB to R 0.08 per MB. A new 1-hour 5MB data bundle was introduced priced at R 1. MTN's amendment was filed in terms of the ICT COVID-19 National Disaster Regulations and came to effect on 20 May 2021.

2.1.1.1.2.11. MTN MyTown Offers

MTN filed an amendment to its MyTown offers with Authority on 21 May 2021, wherein it added more data bundles. MTN's MyTown Offers are a set of personalised bundles offered to specific prepaid customers based on their geographical location, usage and spending patterns. Table 14 below shows a

sample of the additional MyTown offers and more information regarding this offer and its terms and conditions can be obtained from the operator's website¹².

Table 14: MTN's Additional MyTown Offers (Sample)

MyTown Offer	Total Data	Validity	Price (Incl. VAT)	In-bundle rate (Rand per MB)
Personalised Double your bundle - weekly 100MB+100MB	200MB	7 days	R 9	R 0.05
Personalised Double your bundle - weekly 200MB+200MB	400MB	7 days	R 15	R 0.04
Personalised Double your bundle - weekly 300MB+300MB	600MB	7 days	R 20	R 0.03
Personalised Double your bundle - weekly 500MB+500MB	1GB	7 days	R 25	R 0.02
Personalised Double your bundle - weekly 1GB+1GB	2GB	7 days	R 29	R 0.01
Personalised Double your bundle - monthly 1.5GB+1.5GB	3GB	30 days	R 49	R 0.02
Personalised Double your bundle - monthly 3GB+3GB	6GB	30 days	R 79	R 0.01
Personalised Double your bundle - monthly 5GB+5GB	10GB	30 days	R 99	R 0.01
Personalised Double your bundle - monthly 10GB+10GB	20GB	30 days	R 119	R 0.01
Personalised Double your bundle - monthly 20GB+20GB	40GB	30 days	R 199	R 0.00
Personalised Double your bundle - monthly 40GB+40GB	80GB	30 days	R 299	R 0.00
Personalised Double your bundle - monthly 80GB+80GB	160GB	30 days	R 449	R 0.00
Personalised Double your bundle - monthly 120GB+120GB	240GB	30 days	R 1 099	R 0.00
Personalised Double your bundle - monthly 220GB+220GB	440GB	30 days	R 1 599	R 0.00
Personalised Double your bundle - monthly 120GB+120GB	240GB	30 days	R 599	R 0.00
Personalised Double your bundle - monthly 220GB+220GB	440GB	30 days	R 849	R 0.00

Source: ICASA Database based on Tariff Notifications

MTN's MyTown bundles benefit customers with low in-bundle rates ranging from R 0 to R 0.05 per MB, thus customers receive more value for money. For example, the Personalised Double your bundle -monthly 5GB+5GB is priced at R 99 (with an in-bundle rate of R 0.01 per MB), while for the same monetary value, customers can only purchase 1.5GB of the 30-day standard prepaid data, with an in-bundle rate of R 0.06 per MB. Customers cannot share the data bundles using the Data Share service.

¹² Available online at: < <https://www.mtn.co.za/Pages/termsandconditions.aspx?pageId=982> > Accessed 13 July 2021.

MTN filed the amendment its MyTown Offers in terms of the ICT COVID-19 National Disaster Regulations, and therefore came to effect on 25 May 2021.

2.1.1.1.2.12. Vodacom Mobile Internet + Night Owl Bundles

Vodacom's Mobile Internet + Night Owl Bundles were filed with the Authority on 30 June 2021. The bundles consist of Mobile Internet (all access) data bundles and Night Owl bundles and are available in varying validity periods as detailed in table 15 below.

Table 15: Vodacom Mobile Internet + Night Owl Bundles

Data Bundle Allocation	Mobile Internet	Night Owl	Validity	Price (Incl. VAT)	In-bundle rate (Rand per MB)
3 Days Bundles					
4GB	2GB	2GB	3 days	R105.50	R0.05
10GB	5GB	5GB	3 days	R244	R0.05
20GB	10GB	10GB	3 days	R318.50	R0.03
5 Days Bundles					
4GB	2GB	2GB	5 days	R122.50	R0.06
10GB	5GB	5GB	5 days	R286.50	R0.06
20GB	10GB	10GB	5 days	R372	R0.04
7 Days Bundles					
4GB	2GB	2GB	7 days	R128	R0.06
10GB	5GB	5GB	7 days	R319.50	R0.06
20GB	10GB	10GB	7 days	R426	R0.04
40GB	20GB	20GB	7 days	R639	R0.03
60GB	30GB	30GB	7 days	R905.50	R0.03
100GB	50GB	50GB	7 days	R1 278	R0.02
14 Days Bundles					
4GB	2GB	2GB	14 days	R159	R0.08
10GB	5GB	5GB	14 days	R350.50	R0.07
20GB	10GB	10GB	14 days	R478.50	R0.05
40GB	20GB	20GB	14 days	R723.50	R0.04
60GB	30GB	30GB	14 days	R1 011	R0.03
100GB	50GB	50GB	14 days	R1 490	R0.03
30 Days Bundles					
4GB	2GB	2GB	30 days	R169.50	R0.08
10GB	5GB	5GB	30 days	R372	R0.07
20GB	10GB	10GB	30 days	R499.50	R0.05
40GB	20GB	20GB	30 days	R744.50	R0.04
60GB	30GB	30GB	30 days	R1 064	R0.03
100GB	50GB	50GB	30 days	R1 596.50	R0.03

Source: ICASA Database based on Tariff Notifications

It is worth noting that the night owl bundles are offered to customers for “free”, meaning they are effectively not factored into the prices above and can only be used during 00h00 and 04h59 am. Therefore, customers purchasing the 2GB mobile internet bundle, pay R 169.50 which translates to a R 0.08 MB in-bundle rate which equivalent to the 30-day 2GB standard prepaid data bundle which is priced at R 159, therefore on this plan customers would receive an additional 2GB night owl data with the additional R 10.50 price differential¹³.

Compared to Cell C’s 30-day 2GB standard prepaid data bundle priced at R 199, Vodacom’s monthly 2GB Mobile Internet + Night Owl bundle offers customers more value for money, pricing its 2GB bundle at R 29.50 or 14.8% less than what Cell C charges. The data transfer service and ability to roll-over the data is allowed subject to the terms and conditions that can be obtained in the operator’s website¹⁴.

Vodacom introduced the Mobile Internet + Night Owl Bundles in the market on 09 July 2021.

2.1.1.2. Standard Prepaid Data Prices for bundles offered by MVNOs

This section looks at MVNOs who filed mobile data packages with the Authority in the period under review. Only Sakeng Mobile filed its amended once-off data bundles in the period under review, this is discussed in the sub-section below.

2.1.1.2.1. Sakeng Tariff Plans

¹³ The in-bundle rate calculation excludes the additional Night Owl data.

¹⁴ Available online at: < <https://www.vodacom.co.za/vodacom/terms/data-bundle-transfer-terms-and-conditions> > Accessed on 11 July 2021.

Cell C filed an amendment of its MVNO, Sakeng Mobile on 11 February 2021, which entailed price reductions of its once-off data bundles. The plan was previously analysed in the 2019/20 Q2 Bi-Annual Tariff Analysis Report.¹⁵

Table 16 below shows the amended once-off prepaid data bundles that are offered by Sakeng Mobile and the changes in terms of data allocation, prices and validity periods.

Table 16: Sakeng Mobile's Amended Once-off Data Bundles

Data Bundle Size	Validity Period	Previous Price	Current Price	Price Difference	Price Variance (%)
25MB	30 Days	R 5.50	R 3	-R 2.50	-45.5%
50MB	30 Days	R 9.50	R 6	-R 3.50	-36.8%
100MB	30 Days	R 17	R 12	-R 5	-29.4%
250MB	30 Days	R 37	R 30	-R 7	-18.9%
500MB	90 Days	R 88	R 50	-R 38	-43.2%
1GB	90 Days	R 140	R 80	-R 60	-42.9%
2GB	90 Days	R 225	R 150	-R 75	-33.3%
3GB	90 Days	R 290	R 210	-R 80	-27.6%

Source: ICASA Database Based on Tariff Notifications

The reductions in the abovementioned Sakeng Mobile's prepaid data tariffs have a positive benefit for its customers, with the highest price reduction in percentage terms being 45.5% for the 25MB data bundle, while the 3GB bundle had the highest absolute price reduction of R 80.

Sakeng's prepaid data bundle prices are competitive when compared to those charged by the big four MNOs and FNB Connect. Customers opting for Sakeng Mobile's 500MB pay R 19 (or 27.5%) less than what they would pay on Vodacom and Telkom, who charge R 69 for the same data volume. MTN charges R 25 (or 50%) more than what this MVNO charges for the 500MB data bundle. Sakeng Mobile charges R 80 for its 1GB bundle while Vodacom charges R 85 (30-day validity), which is a R 5 (6.3%) price differential. It also should be noted that

¹⁵ Page 78, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-quarter-2-2019-20-jan-jun-2019> > Accessed on 30 June 2021

Sakeng Mobile's 1GB data bundle has a 90-day validity period, which benefits customers with more time to utilise their data without forfeiting it.

The amendments on the Sakeng Tariff Plans came to effect on 01 March 2021.

2.1.1.3. Daily and Weekly Standard Prepaid Data Prices for bundles offered by MNOs and MVNOs

This section provides a comparison of standard Daily and Weekly mobile data bundles offered by MNOs and MVNOs in light of what was filed in the period under review and also considering what other MNOs charge for similar data bundles.

2.1.1.3.1. Daily and Weekly Data Bundles

In the period under review, Cell C and MTN filed weekly data bundles as analysed in 2.1.1.1.2.2. and 2.1.1.2.3., respectively. These notifications and prices are compared in this sub-section to the other MNOs prices as per their previous filings of standard prepaid daily and weekly data bundles.

Previous notifications for standard and daily data plans were received from the other licensees in periods which are outside of the review period, for instance, Telkom Mobile, filed on 19 September 2019, MTN, filed on 31 May 2018, Cell C initially filed on 24 October 2018 and Vodacom filed on 19 March 2018.

Table 17 below compares daily and weekly data bundles offered by Cell C, MTN, Telkom Mobile, Vodacom and FNB Connect, while table 18 shows the in-bundle rates of the daily and weekly bundles which are on table 17.

Table 17: Standard Daily and Weekly Data Bundles

Data Volume	Operators' Prices				
	Cell C	MTN	Telkom Mobile	Vodacom	FNB Connect
Daily Data Bundles					
25MB	R 4	R 5	N/A	R 5 (20MB)	R 4
30MB	N/A	R 5	R 5	N/A	N/A
50MB	R 9 (65MB)	R 8.50	N/A	R 9 (60MB)	R 7

100MB	R 14 (120MB)	R 10	R 10.50 (150MB)	R 15	R 11
250MB	N/A	R 20 (300MB)	R 20 (300MB)	R 27	R 19
500MB	R 25	N/A	N/A	N/A	R 29
1GB	R 28	R 29	N/A	N/A	R 39
Weekly Data Bundles					
50MB	R 8 (45MB)	R 10	R 5	N/A	R 9
100MB	R 12 (80MB)	R 15	R 15	R 17	R 15
250MB	R 25	R 25 (200MB)	R 30	R 35	R 25
500MB	R 50 (600MB)	R 55	R 50	R 60	R 35
1GB	R 65	R 70	R 75	R 80	R 53
2GB	R 95	R 99	R 100	R 120	R 99

Source: ICASA Database based on Tariff Notifications

Table 18: In-bundle Rates for the Standard Daily and Weekly Data Bundles

Data Volume	Operators' In-bundle Rates				
	Cell C	MTN	Telkom Mobile	Vodacom	FNB Connect
Daily Data Bundles					
25MB	R 0.16	R 0.20	N/A	R 0.25	R 0.16
30MB	N/A	R 0.17	R 0.17	N/A	N/A
50MB	R 0.14	R 0.17	N/A	R 0.15	R 0.14
100MB	R 0.12	R 0.13	R 0.07	R 0.15	R 0.11
250MB	N/A	R 0.09	R 0.07	R 0.11	R 0.08
500MB	R 0.05	N/A	N/A	N/A	R 0.06
1GB	R 0.03	R 0.03	N/A	N/A	R 0.04
Weekly Data Bundles					
50MB	R 0.18	R 0.20	R 0.10	N/A	R 0.18
100MB	R 0.15	R 0.15	R 0.15	R 0.17	R 0.15
250MB	R 0.10	R 0.13	R 0.12	R 0.14	R 0.10
500MB	R 0.08	R 0.11	R 0.10	R 0.12	R 0.07
1GB	R 0.07	R 0.07	R 0.07	R 0.08	R 0.05
2GB	R 0.04	R 0.05	R 0.05	R 0.06	R 0.05

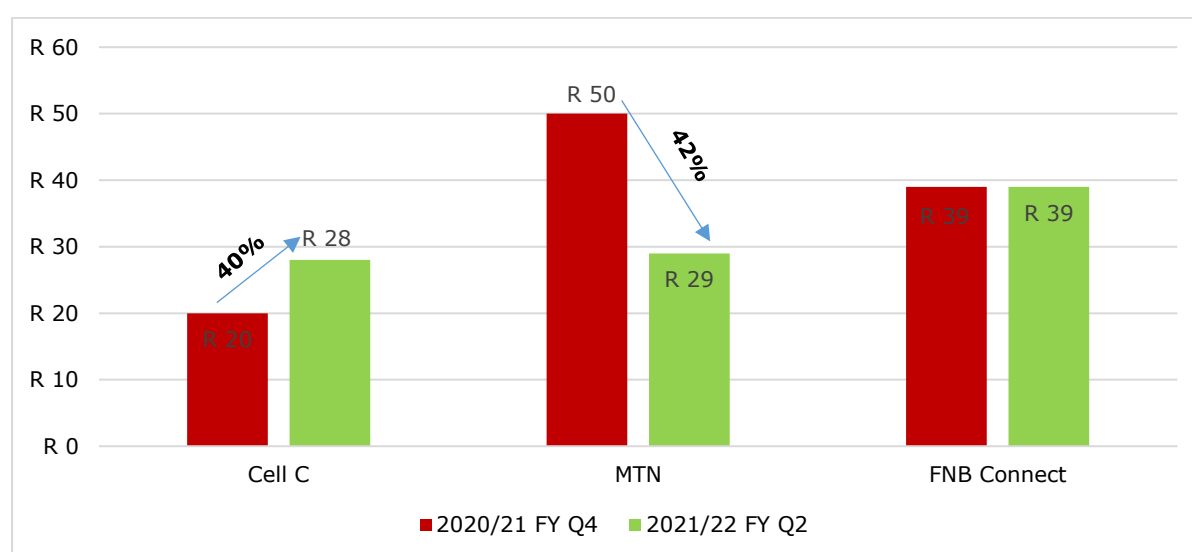
Source: ICASA Database based on Tariff Notifications

On the 100MB - 150MB range of daily data bundles, Telkom Mobile offers more value for money than the other operators, charging the lowest i.e., R 10.50 while offering the more data (150MB) than the other operators. Vodacom charges the most offering 100MB daily data bundle for R 15.

Telkom Mobile and MTN charge the least on the 250MB to 300MB range of daily data bundles, offering 300MB daily data bundle for R 20. This also translates to the lowest in-bundle rate of R 0.07 per MB. Vodacom offers its 250MB daily data bundle for R 27 which results in an in-bundle rate of R 0.11 per MB, which means that a Vodacom customer purchasing a 250MB daily bundle would pay more whilst also receiving 50MB less than what a Telkom Mobile or MTN customer would get when purchasing a 300MB daily data bundle.

Figure 4 below depicts changes that were observed on the 1GB 1-day standard prepaid daily data bundles, respectively, between the 2020/21 FY Q4 Bi-Annual Report and the 2021/22 FY Q2 Bi-Annual Report. Cell C currently offers the most affordable 1GB daily prepaid data bundle amongst the three operators, although the operator increased the price of the 1GB data bundle by 40%, from R 20 to R 28, which therefore has an in-bundle rate of R 0.03 per MB, as shown in table 18 above. MTN however, reduced the price of its 1GB daily data bundle by 42% from R 50 to R 29. FNB Connect did not file any amendments with respect to their 1GB data bundles and their prices remain unchanged at R 39, which is the highest price for such a data bundle offer as shown in table 17 and figure 4. FNB Connect and MTN's daily 1GB data bundles are priced R 11 (or 39%) and R 1 (or 3.57%) more than Cell C's daily 1GB data bundle, respectively. Vodacom and Telkom Mobile do not currently offer a 1-day 1GB daily data bundle.

Figure 4: Daily 1GB Data Bundle Price



Source: ICASA Database Based on Tariff Notifications

In terms of the weekly data bundles, with respect to the 80MB to 100MB range of weekly data bundles, Vodacom offers the most expensive 100MB bundle than the other operators, charging R 17, which equates to an in-bundle rate of R 0.17 per MB. Cell C offers 80MB for R 12, this translates to an in-bundle rate of R 0.15 per MB which offers more value for money, than Vodacom's 100MB weekly data bundle. MTN, Telkom Mobile and FNB Connect's in-bundle rates are at R 0.15 per MB for their respective 100MB weekly data bundles.

FNB Connect charges the least for the 500MB weekly data bundle, offering it for R 35, which translates to an in-bundle rate of R 0.07 per MB. Vodacom has the highest in-bundle rate of R 0.12 per MB, as it offers its 500MB weekly data bundle for R 60. Telkom Mobile and MTN offer their 500MB weekly data bundle for R 50 and R 55, respectively. Cell C does not offer a 500MB weekly bundle, however it offers 600MB weekly data bundle for R 50 which means it offers 100MB more than Telkom Mobile for the same price, thus Cell C offers more value for money hence its in-bundle rate is R 0.08 whilst Telkom Mobile's is R 0.10 per MB.

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

This section focuses on Over-the-Top (OTT) services which are used by a customer to ride on top of an electronic communications network services of a licensed operator to which the customer is connected¹⁶. In order to capitalise on the growth in uptake of OTT services, licensed operators have launched various product offerings so as to maximise their data revenues. The sub-section below discusses the OTT linked product offerings, which MNOs filed notifications for, during the period under review.

¹⁶ Definition of what OTT services are found online: < https://www.itu.int/en/ITU-D/Regional-Presence/Americas/Documents/EVENTS/2015/0421-BS-Economic/1_2.pdf > Accessed on 21 August 2021.

2.1.2.1. Cell C Facebook Flex

Cell C's Facebook Flex was filed with the Authority on 25 January 2021. The plan offers customers free access to basic Facebook through a mobile device such as a cell phone or a tablet. Customers on the plan have access to Facebook Flex, the basic version of Facebook as well as the full Facebook version. The operator only charges customers for accessing the full version of Facebook. More information regarding Cell C's Facebook Flex can be found on the MNO's website¹⁷.

Cell C launched Facebook Flex in the market on 26 January 2021.

2.1.2.2. MTN Youth Pulse Referral Promotion

MTN filed an extension of its Youth¹⁸ Pulse Referral Promotion with the Authority on 19 February 2021. This promotion allows existing MTN Pulse subscribers to refer their friends to join MTN Pulse, and by doing this the customer that refers a friend gets rewarded with a 1GB MTN Pulse Social Pass bundle upon successful registration of the referred friend on the condition that the qualifying referrer is still on MTN Pulse. The Social Pass bundle depletes on the usage of Facebook, WhatsApp, Twitter, YouTube, Instagram and TikTok.

The promotion was initially expected to be in the market until 30 December 2020, however MTN has further extended it and it's now expected to end on 31 December 2021.

2.1.2.3. Vodacom Ticket

Vodacom filed an amendment to its Ticket plan with the Authority on 16 April 2021 which entailed a removal of the Video Play platform on the Vodacom Video Ticket. Video Play is Vodacom's mobile TV service that allows customers watch the video content. Vodacom's preceding amendment with respect to the amendment of the

¹⁷ Available online at: < <https://www.cellc.co.za/cellc/static-content/PDF/Facebook-Flex-TandC.pdf> > Accessed on 07 July 2021.

¹⁸ In terms of the MTN Pulse plan, youth is classified as prepaid customers below the age of 25 years.

Vodacom Ticket was filed with the Authority on 11 November 2020, thus a more detailed analysis of the plan can be found in the 2018/19 FY Q2 Bi-annual Tariff Analysis Report, which was published on ICASA's website on 15 October 2018¹⁹. More information regarding this offer and its terms and conditions can be obtained from the operator's website²⁰.

2.1.2.4. MTN Work From Home/Study Bundles

MTN's Work From Home/Study Bundles were filed with the Authority on 18 May 2021. These are a set of new URL-specific data bundles that are made available to prepaid (and post-paid) customers. MTN introduced these data bundles in response to the global COVID-19 pandemic which has resulted in many people continuing to either working from home or doing virtual studying this year. These bundles give customers access to online meeting applications such as Zoom, WebEx, Google Hangout, Microsoft Classroom, Microsoft Teams and Skype.

Table 19 shows more price and respective information of the Home/Study Bundles.

Table 19: MTN Work From Home/Study Bundles

MTN Work/Study Bundles		Inclusive Value	Price (Incl. VAT)	In-bundle Rate (R per MB)
Daily (Valid for 1 day)	MTN Home 100MB -Daily	100MB	R 6	R 0.06
	MTN Home 250MB -Daily	250MB	R 12	R 0.05
	MTN Home 500MB -Daily	500MB	R 15	R 0.03
	MTN Home 1GB -Daily	1GB	R 19	R 0.02
Weekly (Valid for 7 days)	MTN Home 100MB -Weekly	100MB	R 10	R 0.10
	MTN Home 250MB -Weekly	250MB	R 20	R 0.08
	MTN Home 500MB -Weekly	500MB	R 30	R 0.06
	MTN Home 1GB -Weekly	1GB	R 40	R 0.04
	MTN Home 2GB -Weekly	2GB	R 69	R 0.03
	MTN Home 5GB -Weekly	5GB	R 99	R 0.02
	MTN Home 10GB -Weekly	10GB	R 139	R 0.01
Monthly	MTN Home 100MB -Monthly	100MB	R 12	R 0.12
	MTN Home 250MB -Monthly	250MB	R 29	R 0.12
	MTN Home 500MB -Monthly	500MB	R 45	R 0.09
	MTN Home 1GB -Monthly	1GB	R 60	R 0.06

¹⁹ Pages 33-34, available online at: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-jan-jun-2018> > Accessed on 22 August 2021.

²⁰ Available online at: < https://www.vodacom.co.za/vodacom/services/vodacom-ticket?cid=0_nxtl_0_vdcm_8575&PageSpeed=noscript > Accessed 13 July 2021.

(Valid for 30 days)	MTN Home 2GB -Monthly	2GB	R 99	R 0.05
	MTN Home 5GB -Monthly	5GB	R 199	R 0.04
	MTN Home 10GB -Monthly	10GB	R 259	R 0.03
	MTN Home 20GB -Monthly	20GB	R 359	R 0.02
	MTN Home 30GB -Monthly	30GB	R 399	R 0.01
	MTN Home 50GB -Monthly	50GB	R 499	R 0.01

Source: ICASA Database based on Tariff Notifications

The bundles have varying validity periods, namely daily, weekly and monthly, purchasing a data bundle which lasts for longer the validity period is cost effective. For instance, the weekly MTN Home 1GB is priced at R 40, whereas the monthly MTN Home 1GB is priced at R 60, which means customers have 30 days to use their 1GB of data, at a price of R 60, yet they would have paid R 40 for same data volume to utilise within 7 days, should they decide for various reasons such as affordability or specific need to buy the weekly bundle.

It should be noted that post-paid data bundles roll over to the following month to the maximum of 2 times the value of your inclusive value, and prepaid customers can extend the validity of their data bundles by purchasing a new data bundle before the existing bundle expires.

MTN introduced its Home/Study Bundles in the market on 28 May 2021.

2.1.2.5. MTN Personalised Work From Home Bundles

On 28 May 2021, MTN introduced its Personalised Work From Home Bundles wherein it offers specific prepaid (and post-paid) customers URL-specific data bundles based on their customer profile. Table 20 below shows the Personalised Work From Home Bundles.

Table 20: MTN Personalised Work From Home Bundles (sample)

Personalised Work from Home Bundles		Price (Incl. VAT)	In-bundle Rate (Rand per MB)
Daily (Valid for 1 day)	Personalised WorkFromHome-100MB -Daily	R3	R0.03
	Personalised WorkFromHome-250MB -Daily	R8	R0.03
	Personalised WorkFromHome-500MB -Daily	R10	R0.02
	Personalised WorkFromHome-1GB -Daily	R12	R0.01
	Personalised WorkFromHome-100MB -Weekly	R5	R0.05
	Personalised WorkFromHome-250MB -Weekly	R12	R0.05

Weekly (Valid for 7 days)	Personalised WorkFromHome-500MB -Weekly	R19	R0.04
	Personalised WorkFromHome-1GB -Weekly	R25	R0.02
	Personalised WorkFromHome-2GB -Weekly	R39	R0.02
	Personalised WorkFromHome-5GB -Weekly	R69	R0.01
	Personalised WorkFromHome-10GB -Weekly	R99	R0.01
Monthly (Valid for 30 days)	Personalised WorkFromHome-100MB -Monthly	R7	R0.07
	Personalised WorkFromHome-250MB -Monthly	R15	R0.06
	Personalised WorkFromHome-500MB -Monthly	R25	R0.05
	Personalised WorkFromHome-1GB -Monthly	R35	R0.03
	Personalised WorkFromHome-2GB -Monthly	R59	R0.03
	Personalised WorkFromHome-5GB -Monthly	R139	R0.03
	Personalised WorkFromHome-10GB -Monthly	R179	R0.02
	Personalised WorkFromHome-20GB -Monthly	R249	R0.01
	Personalised WorkFromHome-30GB -Monthly	R289	R0.01
	Personalised WorkFromHome-50GB -Monthly	R349	R 0.01

Source: ICASA Database based on Tariff Notifications

The bundles are available as daily, weekly, and monthly data, giving access to online meeting applications such as Zoom, WebEx, Google Hangout, Microsoft Classroom, Microsoft Teams and Skype. The Personalised Work From Home Bundles offer customers more value for money when compared to the Work From Home/Study Bundles. For example, MTN's monthly Personalised Work From Home-1GB is priced at R 35 (which translates to a R 0.03 per MB in-bundle rate), while the MTN Home 1GB -Monthly is priced at R 60 (which translates to a R 0.06 per MB in-bundle rate). Therefore, customers are discounted R 25 or 41.7% when purchasing the 1GB Personalised Work From Home Bundle.

MTN filed the Personalised Work From Home Bundles in accordance to the ICT COVID-19 National Disaster Regulations, and therefore introduced them in the market on 01 June 2021.

2.2. Analysis of Promotional Prepaid Data Tariffs

This section analyses the promotional prepaid data tariffs which were filed during the period under review. The promotional tariff plans are temporary and time-bound in nature, with generally a start and end date, which is also subject to being extended. The tariff/s analysed in this sub-section are those which had significant amendments effected and continue to be made available to customers post the report publication date (i.e., by or after 30 September 2021) while other promotional prepaid data tariffs, filed in the period under review are found on

either Annexure A or Annexure B, depending on whether the promotion seized to exist in the market before or after 30 June 2021.

2.2.1.MTN PAYG Double Your Bundle Promotion

On 18 March 2021, MTN filed an amendment to its Double Your Bundle Promotion wherein it revised the bundle offers. The promotional offer was initially filed with the Authority on 23 January 2019. MTN offers prepaid customers data bundles, voice bundles and integrated bundles, and rewards them with an additional bundle equivalent to the standard inclusive value. Table 21 below shows a sample of the Double Your Bundle promotional offer and more information regarding this offer and its terms and conditions can be obtained from the operator's website²¹.

Table 21: Double Your Bundle Promotional Offer (Sample)

MTN Double Your Bundle Offer	Validity Period	Price (Incl. VAT)
Personalised Anytime Data Bundle Offers		
Buy 100MB and Get 100MB Free	Daily	R 10
Buy 1024MB and Get 1024MB Free		R 29
Buy 150MB and Get 150MB Free	Weekly	R 12
Buy 1024MB and Get 1024MB Free		R 70
Buy 150MB and Get 150MB Free	Monthly	R 29
Buy 500MB and Get 500MB Free		R 49
Buy 1GB and Get 1GB Free		R 99
Personalized All-net Voice Bundle Offers		
Buy 30Min and Get 30Min Free	Daily	R 10
Buy 60Min and Get 60Min Free		R 15
Buy 30Min and Get 30Min Free	Weekly	R 15
Buy 60Min and Get 60Min Free		R 27
Buy 120Min and Get 120Min Free		R 40
30Min and Get 30Min Free	Monthly	R 20
70Min and Get 70Min Free		R 39
120Min and Get 120Min Free		R 50
Personalized On-net Voice Bundle Offers		
Buy 25Mins and Get 25Mins Free	Daily	R 5
Buy 60Min and Get 60Min Free		R 10
Buy 60Mins and Get 60Mins Free	Weekly	R 12
Buy 100Mins and Get 100Mins Free		R 20
Buy 200Mins and Get 200Mins Free		R 35
Buy 60Mins and Get 60Mins Free	Monthly	R 15
120Min and Get 120Min Free		R 30
Buy 200Mins and Get 200Mins Free		R 50
Personalised Integrated Bundle Offers (Anytime Data and All-Net Minutes)		
Buy 250MB and 25Mins and Get Double	Monthly	R 49
Buy 500MB and 30Mins and Get Double		R 69

²¹ Available online at: < <https://www.mtn.co.za/Pages/termsandconditions.aspx?pageId=982> > Accessed 13 July 2021

Buy 1GB and 50Mins and Get Double	R 99
Buy 1.5GB and 100Mins and Get Double	R 149

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the bundles are available as either daily, weekly and monthly bundles. Customers purchasing a monthly 1GB for example, receive a free additional 1GB data bundle all for R 99. It should be noted that purchase of another bundle does not extend the validity period of an existing promotional bundle.

MTN's amendment to its Double Your Bundle promotion came to effect on 22 March 2021 and the promotional offer is expected to be in the market until 31 March 2022.

2.3. Regulatory interventions underway to address data costs

Section 2.2 above highlighted various prepaid data bundle plans and packages and as was analysed above there has been changes in data bundle prices. Table 4 above indicated that prices have generally been declining for some of Vodacom's standard 30-day prepaid data bundles a new competitively priced standard 30-day prepaid data bundle was introduced by the operator. Noticeably there are various promotions in the market which offer data services at affordable prices. Nonetheless the Authority continues to implement regulatory measures and interventions which seek to ensure that data services prices and other costs to communicate are reasonably affordable.

The sub-sections below provide an update²² of the regulatory interventions which are underway to address data costs.

²² These regulatory interventions were previously discussed in past Bi-annual Tariff Analysis report, with previous update is available in the 2020/21 FY Q2 Bi-annual Tariff Analysis Report which is available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020> >

2.3.1. The ICT COVID-19 National Disaster Regulations

During the period under review, the Authority amended the ICT COVID-19 National Disaster Regulations²³. In terms of the amended Regulations, any tariffs which are intended to benefit and/ or support consumers during the COVID-19 pandemic may be lodged with the Authority one day prior to their operation. As indicated above and elsewhere in this report, various licensees filed their notifications during the period under review in terms of the amended Regulations. The amended Regulations enabled the licensees to expedite the introduction of various products and services in the market, aimed at supporting consumers during the pandemic.

The duration of the temporary spectrum licences was extended to 31 August 2021 and, licensees were required to pay pro-rated radio frequency spectrum licence fees for the period commencing on 01 June 2021 to 31 August 2021. The temporary spectrum was intended to deal with the anticipated rise in demand for network capacity or data services as well as to lower cost of access to consumers during the COVID-19 pandemic.

On 31 August 2021, the Authority further amended the Regulations and provided licensees with a period of three (3) months (i.e., 1 September to 30 November 2021) to wind up the utilisation of the temporary spectrum.²⁴

2.3.2. Licensing processes for the IMT spectrum and the WOAN

On 02 October 2020, the Authority published two Invitations to Apply ("ITAs") relating to the licensing process for International Mobile Telecommunications ("IMT spectrum")²⁵ and the licensing of the Wireless Open Access Network

²³ The recent amendment culminated into the ICT COVID-19 National Disaster Fifth Amendment Regulations, 2021, Government Gazette 44631. Available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/ict-covid-19-national-disaster-fifth-amendment-regulations> > Accessed on 26 August 2021.

²⁴ Government Gazette No. 45069, Notice 785 of 2021.

²⁵ Government Gazette No. 43768, Notice 535 of 2020

(WOAN)²⁶. The ITAs were issued pursuant to the need to increase the bandwidth of high demand spectrum to deal with continued growth in demand for more spectrum (as a result of significant growth in traffic) in the provision of broadband services.²⁷ The objectives of the ITAs are, inter alia, to promote the interests of consumers with regard to the price, quality and the variety of electronic communications services and to promote competition.²⁸

The IMT spectrum auction was expected to commence by the 31st of March 2021²⁹. However, the ITAs processes were halted by an interdict granted against the Authority by the Pretoria High Court.

2.3.3. Market Inquiry into the Mobile Broadband Services Markets

The purpose of the broadband market Inquiry is to assess the state of competition and determine whether or not there are markets or market segments within the mobile broadband services value chain susceptible to *ex ante* regulation.

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

On 26 March 2021, the Authority published its findings document on mobile broadband service inquiry as well as the draft regulations for public comment.³⁰

The Authority's plan is to conclude phase 5 of the project which entails the gazetting of final Regulations, in the current financial year (i.e., 2021/22 FY).

²⁶ Government Gazette No. 43767, Notice 534 of 2020

²⁷ Government Gazette No. 43768, Notice 535 of 2020.

²⁸ Government Gazette No. 43968, Notice No 696 of 2020 and Government Gazette No. 43768, Notice 535 of 2020.

²⁹ The Authority released a media statement on 16 March 2021, indicating that it will appeal the court decision and that it has since halted all processes relating to the licensing of high demand spectrum and the WOAN pending the outcome of the court processes.

³⁰ Government Gazette No. 44337, Notice 272 of 2020.

2.4. Analysis of Standard Prepaid Voice Tariffs

Standard prepaid voice tariffs are categorised into three types, namely flat-rate, dynamic and on-net tariffs. In the period under review no standard prepaid voice tariffs were filed with the Authority and the current tariffs can be obtained in the 2020/21 FY Q2 Bi-Annual Tariff Analysis Report³¹ which was published on ICASA's website on 12 January 2021.

2.4.1. Analysis of standard voice bundles billed per minute

2.4.1.1. Cell C Prepaid Voice Bundles

Cell C filed an amendment of its Cell C Prepaid Voice Bundles with the Authority on 02 March 2021, wherein it added new on-net and any-net bundles to the plan. The Prepaid Voice Bundles were initially filed with the Authority on 28 August 2018 and analysed in the 2018/19 Q4 Bi-Annual Tariff Analysis Report³².

Table 22 below sets out the prices and validity of the additional Cell C Prepaid Voice Bundles filed during the period under review.

Table 22: Cell C Prepaid Voice Bundles

Inclusive Minutes	Price	In-bundle rate	Validity period
On-Net Prepaid Voice Bundles			
20	R 2	R 0.10	20 Minutes
60	R 5	R 0.08	60 Minutes
150	R 10	R 0.07	Midnight on day of purchase
400	R 20	R 0.05	Midnight on day of purchase
90	R 20	R 0.22	7 Days
180	R 30	R 0.17	7 Days
25	R 10	R 0.40	30 Days
60	R 20	R 0.33	30 Days
240	R 29	R 0.12	30 Days
500	R 59	R 0.12	30 Days

³¹ Pages 51-52, available on ICASA's website <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020> > Accessed on 22 August 2021

³² Pages 12-14, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-jul-dec-2018> > Accessed on 19 August 2021

Any-Net Prepaid Voice Bundles			
20	R 5	R 0.25	Midnight on day of purchase
50	R 10	R 0.20	Midnight on day of purchase
15	R 10	R 0.67	7 Days
40	R 20	R 0.50	7 Days
120	R 50	R 0.42	7 Days
25	R 15	R 0.60	30 Days
45	R 30	R 0.67	30 Days
90	R 50	R 0.56	30 Days
240	R 99	R 0.41	30 Days

Source: ICASA Database Based on Tariff Notifications

Cell C's Prepaid Voice 120 minute 7-day any-net voice bundle has an in-bundle rate of R 0.42, as shown in table 22 above, this is comparable to the MTN All-Net and On-Net Voice Bundles 142 minute 7-day bundle with an effective in-bundle rate of R 0.33, thus Cell C customers pay 27.3% more.

Cell C's Prepaid Voice Bundles became available on the market on 12 March 2021.

2.4.1.2. MTN Everyday Talk Bundles

MTN filed its Everyday Talk Bundles with the Authority on 03 May 2021, which offer voice bundles daily, weekly and monthly prepaid all-net voice bundles. The Everyday Talk Bundles form part of the Everyday Product suite. It allows prepaid customers to pay a certain amount of money up-front per 3-days, per week or per month in exchange for a weekly or monthly voice minutes allocation which occurs every day. Table 23 below shows the Everyday Talk Bundles.

Table 23: MTN Everyday Talk Bundles

Validity	Daily Allocation	Total Data Allocation	Price (Incl. VAT)	Effective Rate (Rand per minute)
3 Days	5 Minutes	15 Minutes	R 8	R 0.53
	15 Minutes	45 Minutes	R 19	R 0.42
	30 Minutes	90 Minutes	R 29	R 0.32
	60 Minutes	180 Minutes	R 49	R 0.27
Weekly	5 Minutes	35 Minutes	R 15	R 0.43
	15 Minutes	105 Minutes	R 29	R 0.28
	30 Minutes	210 Minutes	R 49	R 0.23
	60 Minutes	420 Minutes	R 90	R 0.21
Monthly	5 Minutes	150 Minutes	R 49	R 0.33
	15 Minutes	450 Minutes	R 129	R 0.29
	30 Minutes	900 Minutes	R 199	R 0.22
	60 Minutes	1800 Minutes	R 299	R 0.17

Table 23 above shows that if for example a customer opts for the Everyday Talk weekly 60 minutes voice bundle, they will be allocated 60 minutes every day for seven days, which totals to 420 minutes, for a price of R 90.

The Everyday Talk bundles offers customers low effective rates. Thus, customers can avoid paying out-of-bundle (OOB) voice rates by purchasing the Everyday Talk bundles. For example, MTN's Inflow tariff plan (filed with the Authority on 03 April 2019) has an OOB voice rate of R 0.99 per minute, while prepaid customers can opt for the monthly Everyday Talk 450 minutes voice bundle which has a R 0.29 per minute effective rate which saves customers R 0.79 (or 70.7%) per minute.

The notification was filed with in terms of the ICT COVID-19 National Disaster Regulations and came to effect on 05 May 2021.

2.5. Analysis of Integrated Prepaid Tariff Plans

Integrated bundles are a combination of voice, data and/or SMS bundles sold as a unit package to customers. The five standard and promotional integrated product offerings filed with the Authority during the period under review are analysed in the next sub-sections with the focus being on standard prepaid integrated bundles.

2.5.1. Analysis of Standard Prepaid Integrated Bundles

2.5.1.1. Cell C All-In-One Prepaid Tariff Plan

Cell C filed an amendment of its Cell C All-In-One Prepaid Tariff Plan with the Authority on 25 February 2021, wherein it added three new bundles to the Plan. Cell C initially filed its All-In-One Prepaid Tariff Plan with the Authority on 09 June

2020, and it was analysed in the 2020/21 FY Q2 Bi-Annual Tariff Analysis Report³³. Cell C added 5GB, 10GB and 20GB plans to the Cell C All-In-One Prepaid Tariff Plan which were introduced in the market on 26 February 2021. The new All-In-One bundles offered customers social media data allowing access to social media platforms such as Twitter, Instagram, Facebook, TikTok and YouTube. On 08 March 2021, the operator filed a further amendment which entailed an offering to customers for a once-off bonus on every recharge regardless of the starter pack activated, with the bonus allocated being aligned to the rand value of the recharge. Table 24 below sets out the new offerings on the Cell C All-In-One Prepaid Tariff Plan.

Table 24: Cell C All-In-One Prepaid Tariff Plan

All-In-One Bundle	Inclusive Data	Free Bonus Data	Any-net minutes	On-net minutes	Validity	Social Data
All-In-One 5GB	5GB	5GB	90	1000	30-days	500MB
All-In-One 10GB	10GB	10GB	120	1000	30-days	1GB
All-In-One 20GB	20GB	20GB	350	1000	30-days	2GB
Recharge Value (Rands)			Recharge Bonus			
Minimum	Maximum	Data	On-net Voice (Minutes)		Validity	
5	14	30MB	30 minutes		7 days	
15	34	120MB	300 minutes		7 days	
35	49	300MB	600 minutes		7 days	
50	149	1GB	900 minutes		7 days	
150	399	2GB	900 minutes		7 days	
400	699	5GB	1000 minutes		15 days	
700	999	10GB	1000 minutes		15 days	
1000+		20GB	1000 minutes		15 days	

Source: ICASA Database Based on Tariff Notifications

The amendment of Cell C's Prepaid Tariff became effective on 15 March 2021.

2.5.1.1.1.1. Telkom Thola More Prepaid Tariff Plan

On 10 March 2021, Telkom Mobile filed the Telkom Thola More Prepaid Tariff Plan with the Authority, which replaced the SimSonke Prepaid Tariff Plan. The new plan offers customers on the Telkom Thola More Prepaid Tariff Plan double the airtime for every recharge of R 5 or more and per second billing, with the extra airtime

³³ Available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020> >, page 45-46, Accessed on 20 August 2021

which can be used for calls, data, SMSes and/or MMS's. Tables 25 and 26 below shows the Telkom Thola More Prepaid Plan in detail.

Table 25: Telkom Thola More Prepaid Tariff Plan OOB Rates

On-net calls (Telkom Mobile to Telkom Mobile)	R 0.30 (per minute)
Off-net Calls (Telkom Mobile to other networks)	R 0.69 (per minute)
SMS (Domestic)	R 0.50
MMS (Domestic)	R 0.50
Data	R 0.30 per MB

Table 26: Telkom Thola More Free Integrated Bundles

Recharge amount	Inclusive All-net data	Inclusive On-net minutes	Inclusive SMSes	Price	Free Benefits Validity
R 5	20MB	5 minutes	5 SMSes	R 5	3 Days
R 10	40MB	10 minutes	10 SMSes	R 10	3 Days
R 15	60MB	15 minutes	15 SMSes	R 15	3 Days
R 20	80MB	20 minutes	20 SMSes	R 20	3 Days
R 25	100MB	25 minutes	25 SMSes	R 25	3 Days
R 50	200MB	50 minutes	50 SMSes	R 50	7 Days
R 100	400MB	100 minutes	100 SMSes	R 100	7 Days
R 200	500MB	200 minutes	200 SMSes	R 200	7 Days
R 500	1GB	500 minutes	500 SMSes	R 500	7 Days

Source: ICASA Database Based on Tariff Notifications

Compared to Vodacom's Connected Everyday Bundles, Telkom's Thola More Prepaid Tariff Plan offers customers more value for money, with its 100MB, 25 minutes and 25 SMSes (valid 3 days) package priced at R 25 while Vodacom offers 100MB and 10 minutes package for R 39. Thus, Telkom's 100MB, 25 minutes and 25 SMSes package is priced 24.2% less than the comparable Vodacom package.

The Telkom Thola More Prepaid Tariff Plan was launched in the market on 20 March 2021.

2.5.1.2. Shoprite K'nect Mobile Prepaid Tariff Plan

On 19 March 2021, Cell C filed its Cell C Shoprite K'nect Mobile Prepaid Tariff Plan with the Authority. The Shoprite K'nect Mobile Prepaid Plan uses Cell C's infrastructure and offers airtime and data bundles. The Plan includes R 0.50 per minute all day K'nect to K'nect calls as well as R 0.99 per minute all day calls to

other networks. More information on the Shoprite K'nect Mobile Prepaid Tariff Plan can be obtained from the operator's website.³⁴

Table 27 below details the Cell C Shoprite K'nect Mobile Prepaid Tariff Plan.

Table 27: Cell C Shoprite K'nect Mobile Prepaid Tariff Plan

Service	Price
Local Voice Calls (K'nect mobile to other providers)	R 0.99
Local Voice Calls (K'nect mobile to K'nect mobile numbers)	R 0.50
Local Voice Calls (K'nect mobile to Toll Free numbers)	R 0.00
Data (per MB)	R 0.29
Local SMS	R 0.49
International Calls	As per tariff table
International SMS	R 1.99
Local MMS	R 0.99

Bundles	Unit	Price	Validity
On-Net Prepaid Voice Bundles			
K'nect R5 Virtual Airtime	5 min	R 5	60 days
K'nect R10 Virtual Airtime	10 min	R 10	60 days
Data Provided			
K'nect Standard Data Bundle 30MB	30MB	R 4.50	60 days
K'nect Standard Data Bundle 50MB	50MB	R 7.50	60 days
SMS Provided			
K'nect SMS Bundle 25 SMS	25	R 7.50	60 days
K'nect SMS Bundle 50 SMS	50	R 15	60 days
Social Provided			
K'nect WhatsApp Bundle Daily	50MB	R 3.50	24 Hours
K'nect WhatsApp Bundle Weekly	250MB	R 15	7 days

Source: ICASA Database Based on Tariff Notifications

The Cell C Shoprite K'nect Mobile Prepaid Tariff Plan can be compared to the Cell C All-in-One Tariff Plan as tabled below:

Table 28: Cell C All-in-One Tariff Plan vs Shoprite K'nect Mobile Prepaid Tariff Plan

	Cell C All-in-One Tariff Plan	Shoprite K'nect Mobile Prepaid Tariff Plan
Data (per MB)	R 0.29	R 0.29
Voice calls (to any local network at any time)	R 0.99	R 0.99

³⁴ Available online at: < <https://cms.computicket.com/api/assets/knect/4714b678-fcdf-4980-b419-e8af3fd8a4dc/> > Accessed 19 August 2021

SMS	R 0.50	R 0.49
MMS	R 0.50	R 0.99
International SMS	R 1.74	R 1.99

Customers on the Shoprite K’nect Mobile Prepaid Tariff Plan are negatively affected by higher rates for MMS and international SMSes compared to customers on the All-in-One Tariff Plan.

The Cell C Shoprite K’nect Mobile Prepaid Tariff Plan was filed in terms of the ICT COVID-19 National Disaster Regulations; therefore, it came effect on 29 March 2021.

2.5.2. Promotional Prepaid Integrated Plans

2.5.2.1. MTN Student Connect Bundles

MTN filed an extension of its Student Connect Bundles on 12 March 2021 which were initially filed with the Authority on 15 July 2020. In an aim to assist with affordable communication services during the pandemic period, MTN offers students of qualifying academic institutions integrated packages on a prepaid basis (and 24-month contractual period). Table 29 shows the Student Connect Bundles and their respective prices.

Table 29: MTN Student Connect Bundles

Price plan	Inclusive Value	24-month Subscription Fee (Incl. VAT)	Prepaid Subscription Fee (Incl. VAT)
MTN Student Connect 6GB	6GB Anytime + 10GB Night-time express + Free AYOBA usage (20MB per day) + 50 On-net Minutes	R 109	R 119
MTN Student Connect 10GB	10GB Anytime + 20GB Night-time express + Free AYOBA usage (20MB per day) + 100 On-net Minutes	R 139	R 149

Source: ICASA Database based on Tariff Notifications

The table above shows that for a retail price of R 119 prepaid customers receive 6GB Anytime data 10GB night express data free AYOBA usage (i.e., 20MB a day) and 50 on-net minutes. It should be noted that the inclusive data is not shareable and is valid for 30-days with no rollover provision. The AYOBA usage of 20MB only depletes on the usage of AYOBA messaging. Customers who terminate their 24-

month contracts will be liable for termination fees. MTN's Student Connect bundles were expected to be in the market from 20 July to 2020 to 31 October 2020, however MTN filed an extension of the offer and is now expected to be in the market until further notice.

2.5.2.2. Cell C CVM Bundles Promotion

Cell C filed its CVM Bundles Promotion with the Authority on 23 April 2021, which offers customers a combination of data and voice bundles. The CVM Bundles range from 5MB to 20GB and can be used on TikTok, Facebook, Instagram and Twitter. It should be noted that data bundles are non-transferrable from one customer to another. Customers could initially activate the Cell C CVM Bundles without a positive airtime balance, but the operator filed an amendment on 31 May 2021 which made it compulsory for customers to have a positive airtime balance to activate the use of the CVM Bundles. The operator also filed additional bundles under the CVM Bundles Promotion on 14 May 2021, 28 May 2021 and 11 June 2021. Customers could initially access selected CVM Bundles through the main Buy Bundles menu on *147#, but the operator filed an amendment on 31 May 2021 which cancelled this channel.

Table 30 below sets out a sample of the CVM bundles with their applicable prices and validity.

Table 30: Cell C CVM Bundles Promotion

CVM Data Bundles			
Bundle Description	Validity period	Price	Tariff rate per MB
5MB	1 hour	R 1	R 0.20
45MB + 15MB FB	24 hours	R 5	R 0.11
20MB WhatsApp	2 hours	R 2	R 0.10
50MB TikTok	1 Day	R 4.50	R 0.05
25MB Facebook	24 hours	R 1.50	R 0.06
CVM Voice Bundles and On-net Bundles			
Bundle Description	Validity period	Price	Tariff rate per MB
100 on-net min	7 Days	R 20	R 0.08
400 on-net min	14 Days	R 10	R 0.03

15 any net min	7 Days	R 8	R 0.53
20 any net min	24 Hours	R 3.75	R 0.19
CVM Converged Bundle Data and Voice			
Bundle Description	Validity period	Price	Tariff rate per MB
35min + 90MB	24 hours	R 5	R 0.56
630min + 1GB	30 Days	R 49	R 0.05
CVM Weekend Bundles			
Bundle Description	Validity period	Price	Tariff rate per Min
100 Weekend On-Net Min	1-3 Days	R 15	R 0.15
500 Weekend On-Net Min	1-3 Days	R 20	R 0.04

Source: ICASA Database Based on Tariff Notifications

Customers benefit from the data, voice and social media options available on the Cell C CVM Bundles Promotion. The Cell C CVM Bundles Promotion was launched on the market on 24 April 2021 and will run until 31 October 2021.

2.6. LTE and Wi-Fi Tariff Plans

This section analyses LTE and wireless internet tariff plans offered in the market as per notifications filed from 01 June to 30 June 2021. The analysis of the tariff plans will consider MtM³⁵ plans applicable offered during the period under review.

2.6.1. Herotel Wireless and Fibre Amendment

Herotel filed an amendment to its Herotel Wireless and Fibre FTTH with the Authority on 02 March 2021. The amendment entailed a change in prices and the introduction of new packages.

Table 31 below sets out a sample of the prices and line speeds of the amended packages on Herotel Wireless and Fibre. More information on the amended FTTH packages can be obtained on the operator's website³⁶

³⁵ A month-to-month (MtM) plan does not bind customers into long contractual periods. Similar to a prepaid plan, such a plan can be subscribed to on a month-to-month basis, with the customer having an option to cancel their package at any given time.

³⁶ Available online at: < <https://www.herotel.com/hero-wireless/> > Accessed 20 August 2021

Table 31: Herotel Wireless and Fibre Amendment

Product Description	Price
Uncapped 2/1Mbps	R 299
Uncapped 4/2Mbps	R 499
Uncapped 6/2Mbps	R 699
Uncapped 8/3Mbps	R 849
Uncapped 10/3Mbps	R 999
Uncapped 15/5Mbps	R 1 399
Uncapped 20/5Mbps	R 1 899
Uncapped 30/10Mbps	R 2 599
Uncapped 40/10Mbps	R 3 599

Source: ICASA Database Based on Tariff Notifications

Download speeds range from 2 to 40Mbps while the upload speeds range from 1 to 10Mbps. The minimum offer to customers is a 2/1Mbps line speed for R 299 while the highest line speed, 40/10Mbps is priced at R 3 599. Herotel introduced the new Wireless and Fibre prices in the market on 17 March 2021.

2.6.2. MTN Supersonic While You Wait F-LTE Service

MTN filed its supersonic while you wait F-LTE service with the Authority on 8 March 2021. The promotion was initially filed with the Authority on 27 November 2020; and it was in the market from 01 December 2020 until 31 January 2021; however, the operator has re-introduced its While You Wait F-LTE service as a permanent offering in the market. Customers opting into the FTTH service are issued an F-LTE router and a SIM card to access the Internet while waiting for the installation of fibre. It should be noted that the F-LTE service is free of charge until the FTTH service is installed fully installed and activated. This re-introduced and permanent plan was launched in the market as of 10 March 2021.

2.6.3. Telkom While you wait 100GB LTE Data

On 11 March 2021, Telkom Fixed filed its Telkom While you wait 100GB LTE Data Promotion with the Authority, wherein it offered new FTTH customers 100GB LTE data (which excludes roaming) while they wait for the provisioning of their FTTH service in Openserve pre-rollout areas for FTTH.

Table 32 below details the FTTH bundles for the Telkom While you wait 100GB LTE Data promotion.

Table 32: Telkom While you wait 100GB LTE Data Promotion

Product name	Speed	Validity
FTTx Unlimited Home Lite	25Mbps	60 Days
FTTx Unlimited Home Lite	50Mbps	60 Days
FTTx Unlimited Home Lite	100Mbps	60 Days
FTTx Unlimited Home Lite	200Mbps	60 Days
FTTx Unlimited Home Premium	25Mbps	60 Days
FTTx Unlimited Home Premium	50Mbps	60 Days
FTTx Unlimited Home Premium	100Mbps	60 Days
FTTx Unlimited Home Premium	200Mbps	60 Days

Source: ICASA Database Based on Tariff Notifications

Customers benefit from the LTE data while they wait for the provisioning of their FTTH service. The Telkom While you wait 100GB LTE Data Promotion was launched on 15 March 2021 and will be available in the market until the end of September 2021.

2.6.4. MTN F-LTE 1TB Home Month-to-Month SIM-only Plan

MTN filed an amendment to its 1TB F-LTE Home Month-to-Month Plan with the Authority on 25 March 2021, wherein it reduced the subscription fee of the package. Table 33 below details the amendment of the plan.

Table 33: MTN F-LTE 1TB Home Month-to-Month SIM-only Plan

MTN Home Wi-fi FLTE plans	Inclusive Value	Old Price (Incl. VAT)	New Price (Incl. VAT)	Price Difference	Price Difference (%)
MTN Made For Home MTM TopUp 1TB(MD84) (SIM only)	1TB	R 1 399	R 959	-R 440	-31.5%

Source: ICASA Database based on Tariff Notifications

The 1TB package realised a R 440 or 31.5% tariff decrease from R 1 399 to R 959. It should be noted that the inclusive data can carry over for two months thereafter it is forfeited. The operator has also made the call line identity and itemised billing value-added services available for free to customers who opt for the MtM price

plan. MTN's amendment notification was filed in terms of the ICT COVID-19 National Disaster Regulations and therefore came to effect on 01 April 2021.

2.6.5. Cell C Home Connecta Flexi Promotion

On 26 March 2021, Cell C filed its Home Connecta Flexi Promotion with the Authority. The Plan offered Cell C prepaid and TopUp customers anytime and night data on the Home Connecta Flexi Bundles Promotion depending on the customer's general spend. More information on this offer and its terms and conditions can be obtained from the operator's website³⁷.

Table 34 below sets out the prices of the packages on the Cell C Home Connecta Flexi Promotion.

Table 34: Cell C Home Connecta Flexi Promotion

Home Connecta Flexi Promotion		
Service	Tariff rate per MB	Time of Day
Out of Bundle Data	R 0.29	Anytime
SMS	R 0.51	Anytime

Source: ICASA Database Based on Tariff Notifications

Table 35: Home Connecta Flexi Promotional Bundles

Home Connecta Flexi Bundles Promotion				
Bundle	Anytime data	Night data	Price	Validity
10GB	5GB	5GB	R 59	30 Days
20GB	10GB	10GB	R 139	30 Days
50GB	25GB	25GB	R 179	30 Days
100GB	50GB	50GB	R 199	30 Days
200GB	100GB	100GB	R 389	30 Days
400GB	200GB	200GB	R 699	30 Days
1TB	1000GB	0	R 899	30 Days

Source: ICASA Database Based on Tariff Notifications

³⁷ Available online at: < <https://www.cellc.co.za/cellc/home-connecta-flexi> > Accessed on 20 July 2021.

The Cell C Home Connecta Flexi Promotion was launched on the market on 27 March 2021 and will be made available on the market until 30 September 2021.

2.6.6. Cell C Home Connecta

Cell C filed an amendment to its Home Connecta with the Authority on 01 April 2021. The amendment was regarding the terms and conditions of the plan, wherein the availability of the plan was made available for a period of 36 months. The addition of a longer contract term was to the benefit of Cell C customers who could stay on a fixed price for a longer period if they are satisfied with the Plan.

The amendment was filed according to the ICT Disaster Regulations and became effective on 07 April 2021.

2.6.7. MTN BozzaGigs LTE Price Plan and Bundles

MTN filed its BozzaGigs LTE price plan with the Authority on 16 April 2021. The plan offers new prepaid customers large volume of data bundles at affordable prices. Tables 36 and 37 below shows the plan.

Table 36: MTN BozzaGigs LTE Bundles

Total Inclusive Value	Breakdown of Inclusive Value	Price	Validity
10GB	5GB Anytime Data + 5GB Night Express	R 99	30 days
15GB	7.5GB Anytime Data + 7.5GB Night Express	R 129	
20GB	10GB Anytime Data+ 10GB Night Express	R 149	

Source: ICASA Database based on Tariff Notifications

The table above shows that customers are offered, for example, 5GB anytime data and 5GB night express data bundles for R 99. Table 37 below shows the OOB rates applicable to the plan.

Table 37: BozzaGigs LTE OOB Rates

Service	OOB Rate
Voice	R 1.99
SMS	R 0.50
Data	R 0.29 (non-bundle users)
	R 0.49 (bundle users)

Source: ICASA Database based on Tariff Notifications

The bundles are available on a once-off or recurring basis and customers can migrate to MTN BozzaGigs LTE price plan via the *137# USSD code, within 30 days of new SIM activation.

It should be noted that the bundles are valid for 30 days, however, customers are able to extend the validity of an existing bundle by purchasing another once-off BozzaGigs LTE data bundle. The recurring bundles roll over two times the inclusive bundle value. The BozzaGigs LTE price plan was filed according to the ICT COVID-19 National Disaster Regulations and was introduced in the market on 20 April 2021.

2.6.8. Rain 19 hours unlimited off-peak for any device

Rain filed its 19 hours unlimited off-peak for any device with the Authority on 19 April 2021. The product offered customers unlimited off-peak data for R 250 per month to use during off peak hours (11pm – 6pm the next day). Customers on the plan have the option to purchase 1GB of data to use during peak hours (6pm to 11pm).

The 19 hours Unlimited offers unlimited data during off-peak hours while having the option to purchase 1GB of data to use during peak hours for R 50. The Rain 19 hours unlimited off-peak for any device was launched on 26 April 2021.

2.6.9. MTN Supersonic Air Fibre

MTN's Supersonic Air Fibre service was filed with the Authority on 19 May 2021. The operator offers customers broadband services that utilise fixed wireless access (FWA). Table 38 below shows the Supersonic Air Fibre packages available to customers.

Table 38: MTN Supersonic Air Fibre

Line speed (Mbps)	Price (Incl. VAT)
5/1	R 399

10/2	R 499
20/4	R 599
50/10	R 799
100/20	R 999

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the broadband services are asymmetrical. It should also be noted that broadband service is uncapped and unshaped. For example, the 20/4Mbps package offers uncapped and unshaped service from R 599 per month. The service is only available to areas where there is Air Fibre coverage. The retail offering includes a Wi-Fi router, external wireless access point (RN) and Power over Ethernet (POE) injector. The Wi-Fi router is offered to customers free of charge (i.e., on a free-to-use basis), however, customers are obligated to return the equipment upon cancellation of service.

MTN's Supersonic Air Fibre service was filed in terms of the ICT COVID-19 National Disaster Regulations and therefore came to effect on 21 May 2021.

2.7. Month-to-Month Fibre-to-the-Home Tariff Plans

This section analyses Fibre-to-the Home (FTTH) tariff plans offered in the market and the prices charged by the operators, as per notifications filed from 01 January to 30 June 2021. The analysis of the tariff plans will consider the current MtM Self-Built FTTH plans, MtM fibre plans offered through 3rd party fibre network operators (FNOs) and promotional offers applicable to MtM contracts offered during the period under review.

2.7.1. Self-Built FTTH Offerings

2.7.1.1. Vox Telecom FTTH

The Authority received Vox Telecom's FTTH notification on 22 January 2021, which entailed tariff adjustments for selected FTTH packages, wherein it increased prices

for its Basic and Pro Uncapped packages. More information regarding Vox Telecom's FTTH can be found on the FNO's website³⁸.

Vox filed additional amendments on 19 February 2021, 01 March 2021, 23 March 2021 and 22 June 2021, which entailed tariff and product adjustments for selected FTTH packages, including a discontinuation of the 10/10Mbps and 20/20Mbps packages, the introduction of the 25/25Mbps package and price decreases ranging from -16.7% to -25.7% on the 50/25Mbps and 200/10Mbps packages.

Table 39 below details the price and line speed amendments of the selected packages.

Table 39:Vox Telecom FTTH

Product Description	Previous Line Speed (Mbps)	New Line Speed (Mbps)	Previous Pricing (Incl. VAT)	Current Pricing (Incl. VAT)	Price Difference	Variance (%)
22 January 2021						
Basic Uncapped	10/10	N/A	R 589	R 654	R 65	11%
Pro Uncapped	50/50	N/A	R 799	R 914	R 115	14.4%
19 February 2021						
Basic	10/2	10/10	R 649	R 699	R 50	7.7%
Pro uncapped	10/2	10/10	R 899	R 949	R 50	5.6%
Capped	20/2	20/20	R 819	R 899	R 80	9.8%
Basic uncapped	20/2	20/20	R 819	R 899	R 80	9.8%
01 March 2021						
Basic Uncapped 10/10	10/10	N/A	R 599	N/A	N/A	N/A
Basic Uncapped 50/25	50/25	N/A	R 959	R 799	-R 160	-16.7%
Basic Uncapped 200/10	200/10	N/A	R 1 559	R 1 159	-R 400	-25.7%
23 March 2021						
Basic Uncapped	5/1	N/A	R 539	N/A	N/A	N/A
Basic Uncapped	50/5		R 857	R 749	-R 108	-12.6%
Basic Uncapped	50/50		R 922	R 816	-R 106	-11.5%
Basic Uncapped	100/10		R 958	R 857	-R 101	-10.5%
Basic Uncapped	100/100		R 1 023	R 922	-R 101	-9.9%
Basic Uncapped	200/200		R 1 249	R 1 023	-R 226	-18.1%
Basic Uncapped	500/500		R 1 559	R 1 499	-R 60	-3.8%
Basic Uncapped	1000/1000		R 2 699	R 1 999	-R 700	-25.9%
22 June 2021						
Basic Uncapped 50/5	50/5	50/50	R 959	R 899	-R 60	-6.3%
Basic Uncapped 100/10	100/10	100/100	R 1 149	R 1 099	-R 50	-4.4%
Basic Uncapped 200/20	200/20	200/200	R 1 399	R 1 249	-R 150	-10.7%

Source: ICASA Database Based on Tariff Notifications

³⁸ Available online at: < <https://www.vox.co.za/fibre/fibre-to-the-home?prod=HOME> > Accessed 03 March 2021

The final Vox Telecom's price and products amendment came into effect on 01 July 2021.

2.7.1.2. CIPHERWAVE ZOOM FIBRE

On 12 February 2021, Cipherwave Networks filed its Zoom Fibre notification, which entailed the introduction of new symmetrical FTTH packages ranging from 10Mbps to 200Mbps, offering more options for customers.

Table 40 below details the line speed packages and prices of the Cipherwave Zoom Fibre offerings.

Table 40: Cipherwave Zoom Fibre

Line Speed	Subscription Fee (Incl. VAT)
10/10Mbps	R 588
20/20Mbps	R 688
50/50Mbps	R 888
100/100Mbps	R 988
200/200Mbps	R 1 288

Source: ICASA Database based on Tariff Notifications

The growing fibre market offers customers product variety and competitive prices. For example, Amobia on MetroFibre's 100/100Mbps FTTH analysed in the 2020/21 FY Q2 Bi-Annual Tariff Analysis Report³⁹ is priced at R 1 199 while Cipherwave Zoom Fibre offers its 100/100Mbps package for R 988, which is priced at R 211 or 17.60% less, offering customers more value for money. Cipherwave Home-Connect Zoom Fibre was launched in the market on 25 February 2021.

2.7.1.3. FRANCOIS O'KENNEDY W.O.R.X FWORX 10MBPS

³⁹ Page 76, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/bi-annual-tariffs-analysis-report-01-jul-to-31-dec-2020> > Accessed 21 July 2021.

On 24 February 2021, Francois O’Kennedy W.O.R.X filed an amendment with the Authority of the FWORX 10Mbps wherein it reduced the price from R 750 to R 650 (-13%) to the benefit of customers.

The amendment of the FWORX 10Mbps became effective on 01 March 2021.

2.7.1.4. Ladysmith Wireless Solutions

On 25 February 2021, Ladysmith Wireless Solutions filed amendments with the Authority regarding various of its FTTH packages. The amendments entailed increases in line speeds, price reductions and the termination of certain packages with new packages introduced in their place.

Table 41 below sets out a sample of Ladysmith Wireless’s new and terminated FTTH packages filed with the Authority.

Table 41: Ladysmith Wireless Solutions FTTH

Product Description	Current Line Speed (Mbps)	Current Price
New FTTH packages		
Fibre Internet Home Uncapped up to 5Mbps Monthly Package	5/2	R 299
Fibre Internet Home Uncapped up to 10Mbps Monthly Package	10/5	R 399
Fibre Internet Home Uncapped up to 20Mbps Monthly Package	20/5	R 599
Fibre Internet Home Uncapped up to 30Mbps Monthly Package	30/10	R 799
Fibre Internet Home Uncapped up to 50Mbps Monthly Package	50/10	R 999
Fibre Internet Home Uncapped up to 100Mbps Monthly Package	100/20	R 1 199
Fibre Internet Home Uncapped up to 200Mbps Monthly Package	200/20	R 1 499
Terminated FTTH packages		
Fibre Internet Home Uncapped up to 5Mbps Monthly Package	5/3	R 499
Fibre Internet Home Uncapped up to 10Mbps Monthly Package	10/5	R 699
Fibre Internet Home Uncapped up to 15Mbps Monthly Package	15/8	R 899
Fibre Internet Home Uncapped up to 20Mbps Monthly Package	20/10	R 1 099
Fibre Internet Home Uncapped up to 30Mbps Monthly Package	30/15	R 1 299
Fibre Internet Home Uncapped up to 50Mbps Monthly Package	50/25	R 1 599

Source: ICASA Database Based on Tariff Notifications

The amendments of the Ladysmith Wireless Solutions FTTH became effective on 01 March 2021.

2.7.1.5. Cybersmart Big Bay MPOA – Lightspeed FTTH

Cybersmart filed the Cybersmart Big Bay MPOA - Lightspeed FTTH with the Authority on 08 March 2021. The Cybersmart Big Bay MPOA - Lightspeed FTTH consists of two new line speeds on the Big Bay MPOA infrastructure.

Table 42 below sets out the prices and line speeds available on the Cybersmart Big Bay MPOA - Lightspeed FTTH.

Table 42: Cybersmart Big Bay MPOA - Lightspeed FTTH

Product Description	Price
20/20Mbps	R 399
500/500Mbps	R 599

Source: ICASA Database Based on Tariff Notifications

Cybersmart's Big Bay MPOA – Lightspeed FTTH, can be compared to Cybersmart on Frogfoot FTTH Packages, wherein the Cybersmart on Frogfoot FTTH has higher prices on the 500/500Mbps package by 116%, therefore customers receive more value for money on Cybersmart's Big Bay MPOA – Lightspeed FTTH package. The launch date of the Cybersmart Big Bay MPOA -Lightspeed FTTH was 18 March 2021.

2.7.1.6. Herotel FTTH

On 28 March 2021, Herotel filed its FTTH and FTTB with the Authority, which offered FTTH customers a trench fibre product for residential areas utilising trenched fibre.

Table 43 below sets out the prices and line speeds available on Herotel FTTH.

Table 43: Herotel FTTH

Line Speed	Price
5Mbps	R 599
10Mbps	R 699
20Mbps	R 849

50Mbps	R 999
100Mbps	R 1 199
200Mbps	R 1 499

Source: ICASA Database Based on Tariff Notifications

The table above shows that Herotel's FTTH offers customers FTTH packages with line speeds ranging from 5Mbps to 200Mbps.

Herotel's FTTH and FTTB was launched on the market on 05 April 2021.

2.7.1.7. Cybersmart Lightspeed Home Fibre

On 08 April 2021, Cybersmart filed its Lightspeed Home Fibre with the Authority. The fibre plan was introduced in order to replace the terminated home fibre packages on the Cybersmart network and offered customers line speeds of up to 50Mbps for R 648.

Table 44 below sets out the line speeds and prices offered on the Lightspeed Home Fibre packages.

Table 44: Cybersmart Lightspeed Home Fibre

Line Speed	Subscription Fee (Incl. VAT)
25/25Mbps	R 448
50/50Mbps	R 648

Source: ICASA Database Based on Tariff Notifications

Customers benefit from competitively priced new line speed packages on the Cybersmart Lightspeed Home Fibre. For example, the 50/50Mbps line speed package is priced at R 795 or 22.69% higher on the Cybersmart on Frogfoot FTTH. The new packages on Cybersmart Lightspeed Home Fibre were launched on 20 April 2021.

2.7.1.8. MetroFibre FTTH

On 15 April 2021, MetroFibre filed amendments to its FTTH products with the Authority. The amendments entailed the discontinuation of the 10Mbps package

and an increase in line speeds on all direct and indirect customer FTTH packages. MetroFibre introduced a 300Mbps package priced at R 1 850 for direct customers and R 872 to ISPs.

Table 45 below sets out the upgraded line speeds and prices on MetroFibre FTTH.

Table 45: MetroFibre FTTH

Package	Previous Price	New Price	Difference	Variance
10Mbps	R 760	Discontinued	N/A	N/A
25Mbps	R 1 070	R 760	-R 310	-29%
50Mbps	R 1 240	R 1 070	-R 170	-13.7%
100Mbps	R 1 650	R 1 240	-R 410	-24.8%
200Mbps	R 1 850	R 1 650	-R 200	-10.8%
300Mbps	N/A	R 1 850	N/A	N/A

Source: ICASA Database Based on Tariff Notifications

As shown in the table 45 above, MetroFibre reduced the fee for all previously existing FTTH packages, with the largest reduction in percentage terms of 29% on the 25Mbps package, thus benefiting customers with lower subscription fees. The amendments on the MetroFibre FTTH packages became effective on 01 June 2021.

2.7.1.9. Mzanzi Lisetta and Printing

On 27 April 2021, Mzanzi Lisetta Media and Printing filed its new proposed bandwidth packages with the Authority. The new bandwidth packages offered customers entry, value, speed and top up options with line speeds ranging from 2/2Mbps to 10/10Mbps, priced at R 99 to R 999, respectively. The addition of the new bandwidth packages offered more options for customers in the market.

Table 46 below sets out the line speeds and prices of the new proposed bandwidth packages offered by Mzanzi Lisetta Media and Printing.

Table 46: Mzanzi Lisetta Media and Printing Bandwidth offer

Package	Line Speed	Cap	Price
Entry Packages			
ENTRY 2 - 25+	2/2Mbps	25G + 25G FREE	R 99
ENTRY 2 - 50+	2/2Mbps	50G + 25G FREE	R 149
Value Packages			
VALUE 6 - 50+	6/6Mbps	50G + 50G FREE	R 599
VALUE 6 - 100+	6/6Mbps	100G + 50G FREE	R 699
Speed Packages			
SPEED 10 - 100+	10/10Mbps	100G + 100G FREE	R 899
SPEED 10 - 300+	10/10Mbps	300G + 150G FREE	R 999
TopUp Options			
Top Up - 5	N/A	5	R 55
Top Up - 10	N/A	10	R 95

Source: ICASA Database Based on Tariff Notifications

The new Mzanzi Lisetta Media and Printing bandwidth offer became effective on 01 June 2021.

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

2.7.2.1. Vodacom FTTH Service on Openserve

Vodacom filed amendments to its Openserve FTTH plan with the Authority on 20 January 2021 and 08 March 2021, wherein it increased the line speeds of selected fibre packages and revised the subscription fees. Table 46 below details the amendments.

Table 47: Vodacom FTTH Service on Openserve

Previous Line Speed (Mbps)	Previous Monthly Subscription	Current Line Speed (Mbps)	Current Monthly Subscription	Price Difference	Variance (%)
20 January 2021 Notification					
8/5	R 449	8/5	R 449	N/A	N/A
10/5	R 599	10/10	R 599	N/A	N/A
20/10	R 799	20/20	R 799	N/A	N/A
40/20	R 999	50/25	R 999	N/A	N/A
100/50	R 1 149	100/50	R 1 149	N/A	N/A
200/100	R 1 549	200/100	R 1 549	N/A	N/A
08 March 2021 Notification					
10/10	R 599	20/20	R 449	-R 150	-25%
20/20	R 799	25/25	R 599	-R 200	-25%

50/25	R 999	-	R 799	-R 200	-20%
100/50	R 1 149	-	R 999	-R 150	-13.1%
200/100	R 1 549	-	R 1 149	-R 400	-25.8%

Source: ICASA Database based on Tariff Notifications

As shown in the table above, on 20 January 2021 Vodacom upgraded the line speeds of selected fibre packages on the Openserve network, while the monthly subscriptions remained unchanged. For example, the 20/10Mbps was increased to 20/20Mbps line speed while the subscription fee remained unchanged at R 799. On 08 March 2021, the operator revised the 10/10Mbps and 20/20Mbps fibre packages, increasing these to 20/20Mbps to 25/25Mbps, respectively. Vodacom also revised the subscription fees of the plan, with the 200/100Mbps package realising the largest decrease in both absolute value and percentage terms of R 400 or 25.8%, from R 1 549 to R 1 149.

The amendments were filed in terms of the ICT COVID-19 National Disaster Regulations and therefore came to effect on 22 January 2021 and 10 March 2021, respectively.

2.7.2.2. Cybersmart on Vodacom FTTH Packages

On 28 January 2021, Cybersmart filed its new FTTH packages on Vodacom. Fibre packages on the Vodacom network comprise of asymmetrical and symmetrical fibre packages, with download speeds ranging from 10Mbps to 200Mbps and upload speeds ranging from 5Mbps to 100Mbps.

Table 48 below sets out Cybersmart's Vodacom FTTH packages.

Table 48: Cybersmart on Vodacom FTTH Packages

Line Speed	Subscription Fee (Incl. VAT)
10/5Mbps	R 809
10/10Mbps	R 899
20/10Mbps	R 1 039
20/20Mbps	R 1 139
40/20Mbps	R 1 229
40/40Mbps	R 1 329
100/50Mbps	R 1 419

100/100Mbps	R 1 519
200/100Mbps	R 1 619

Source: ICASA Database Based on Tariff Notifications

Cybersmart on Vodacom's 100/100Mbps FTTH package can be compared to MWEB on Vodacom's⁴⁰ 100/100Mbps FTTH package which is priced at R 1 189 or 21.7% less. The Cybersmart on Vodacom FTTH was launched on the market on 10 February 2021.

2.7.2.3. Directel FTTH

On 12 February 2021, the Authority received a notification from Directel Communications regarding amendments to currently existing packages, the introduction of new line speeds and the termination of line speeds on certain packages. The amendments were on the Directel on Century Connect, Directel on Converged, Directel on Evotel, Directel on Fibre Suburb Network, Directel on Linklayer, Directel on MetroFibre, Directel on Netstream, Directel on Octotel, Directel on SADV/Vumatel.

Table 49 below sets out the price amendments and new packages introduced on the various Directel FTTH packages.

Table 49: Directel FTTH

Century City Connect				
Package	Previous Price	New Price	Difference	Variance
Apollo 10/5	R 495	R 595	R 100	20.2%
Converged				
Package	Previous Price	New Price	Difference	Variance
Apollo 10/10	R 695	R 725	R 30	4.3%
Evotel				
Package	Previous Price	New Price	Difference	Variance
Apollo 20/20	R 845	R 855	R 10	1.2%
Apollo 200/200	R 1 495	R 1 395	-R 100	-6.7%
Fibre Suburb Network				
Package	Previous Price	New Price	Difference	Variance
Apollo 10/10	R 595	R 625	R 30	5%
Apollo 50/50	R 895	R 925	R 30	3.4%

⁴⁰ Page 84, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/bi-annual-tariffs-analysis-report-01-jul-to-31-dec-2020> > Accessed 20 August 2021

Apollo 100/100	R 995	R 1 105	R 110	11.1%
Apollo 200/200	N/A	R 1 645	N/A	N/A
Linklayer				
Package	Previous Price	New Price	Difference	Variance
Apollo 200/200	R 1 395	R 1 345	-R 50	-3.6%
Metrofibre				
Package	Previous Price	New Price	Difference	Variance
Apollo 200/200	R 1 795	R 1 495	-R 300	-16.7%
Netstream				
Package	Previous Price	New Price	Difference	Variance
Apollo 20/20	R 845	R 895	R 50	5.9%
Apollo 50/50	R 1 045	R 1 095	R 50	4.8%
Apollo 100/100	R 1 145	R 1 195	R 50	4.4%
SADV/Vumatel				
Package	Previous Price	New Price	Difference	Variance
SADV Apollo 10/10	R 695	R 725	R 30	4.3%
SADV Apollo 20/20	R 795	R 895	R 100	12.6%
SADV Apollo 50/50	R 995	R 1 045	R 50	5%

Source: ICASA Database Based on Tariff Notifications

Table 49 above shows that the largest price reduction of 16.7% in percentage terms occurred on the Directel on MetroFibre Apollo 200/200 FTTH package to the benefit of customers. Customers were negatively impacted by the 20.2% price increase on the Directel on Century City Connect Apollo 10/5 package. Directel on MetroFibre's Apollo 200/200 FTTH package can be compared to Amobia on MetroFibre's⁴¹ 200/200Mbps FTTH package which is priced at R 1 349 or 9.8% less. The amendments on Directel FTTH packages became effective on 01 March 2021.

2.7.2.4. MWEB on Openserve FTTH

MWEB filed an amendment to its FTTH packages on Openserve network with the Authority on 16 February 2021. Fibre packages on the Openserve network realised tariff and line speed changes. The uncapped 50/25Mbps, 100/50Mbps, 200/100Mbps packages on MWEB on Openserve FTTH Lite were the only packages to realise a tariff increase accompanied by an increase in line speeds. All other

⁴¹ Page 76, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/bi-annual-tariffs-analysis-report-01-jul-to-31-dec-2020> > Accessed 20 August 2021

packages experienced an increase in line speed with either no change in tariff or a tariff decrease.

Table 50 below sets out the changes in line speeds and tariffs on MWEB on Openserve FTTH packages.

Table 50: MWEB on Openserve FTTH

Product Description	Previous Line Speed (Mbps)	Current Line Speed (Mbps)	Previous Price	Current Price	Price Difference	Variance (%)
MWEB on Openserve FTTH Lite						
Uncapped 10/5Mbps	10/5	25/25	R 449	R 449	R 0	0%
Uncapped 20/10Mbps	20/10	50/25	R 699	R 739	R 40	5.7%
Uncapped 50/10Mbps	50/10	100/50	R 859	R 899	R 40	4.7%
Uncapped 100/20Mbps	100/20	200/100	R 999	R 1 049	R 50	5%
Uncapped 200/50Mbps	200/50	200/100	R 1 399	R 1 049	-R 350	-25%
MWEB on Openserve FTTH Standard						
Uncapped 10/5Mbps	10/5	25/25	R 659	R 659	R 0	0%
Uncapped 20/10Mbps	20/10	50/25	R 929	R 929	R 0	0%
Uncapped 50/10Mbps	50/10	100/50	R 1 039	R 1 039	R 0	0%
Uncapped 100/20Mbps	100/20	200/100	R 1 339	R 1 339	R 0	0%
Uncapped 200/50Mbps	200/50	200/100	R 2 029	R 1 339	-R 690	-34%
MWEB on Openserve FTTH Premium						
Uncapped 10/5Mbps	10/5	25/25	R 809	R 659	-R 150	-18.5%
Uncapped 20/10Mbps	20/10	50/25	R 1 239	R 929	-R 310	-25%
Uncapped 50/10Mbps	50/10	100/50	R 1 439	R 1 039	-R 400	-27.8%
Uncapped 100/20Mbps	100/20	200/100	R 2 039	R 1 339	-R 700	-34.3%

Source: ICASA Database Based on Tariff Notifications

The largest tariff decline in absolute and percentage terms of R 700 (34.3%) was realised on the Uncapped 100/20Mbps package, from R 2 039 to R 1 339. MWEB on Openserve's Standard Uncapped 50/25Mbps FTTH can be compared to Cell C's C-Fibre on Openserve 50/25Mbps priced at R 799 or 14% less. The amendment of the MWEB on Openserve FTTH came to effect on 01 March 2021.

2.7.2.5. Vodacom on Octotel FTTH

Vodacom's amendment to its Octotel FTTH plan was filed with the Authority on 25 February 2021. The amendment entailed a line speed upgrade of the fibre packages, as shown in table 51 below.

Table 51: Vodacom on Octotel FTTH

Current Line Speed (Mbps)	New Line Speed (Mbps)	Previous Subscription (Incl. VAT)	Current Subscription (Incl. VAT)	Price Difference	Price Difference (%)
10/5	15/15	R 599	R 709	R 110	18.4%
10/10		R 709		R 0	0.0%
20/5	30/30	R 809	R 839	R 30	3.7%
20/20		R 899		-R 60	-6.7%
100/25	100/100	R 999	R 1 139	R 140	14.0%
100/100		R 1 209		-R 70	-5.8%
200/25	200/200	R 1 399	R 1 399	R 0	0.0%
200/200		R 1 519		-R 120	-7.9%

Source: ICASA Database based on Tariff Notifications

It can be deduced from the table that the line speed upgrade resulted in some customers incurring more subscription costs. For example, the 10/5Mbps line speed was priced at R 599 and the new 15/15Mbps line speed is priced at R 709 per month which is R 110 or 18.4% more than the previous subscription fee. On the other hand, other customers benefited from the line speed upgrade in a form of improved services and/or reduced prices. For example, the 20/20Mbps line speed was priced at R 899 and the new 30/30Mbps line speed is priced at R 839 per month, which is R 60 or 6.7% less than the previous subscription fee. Customers who previously had 10/10Mbps line speed, received a line speed upgrade to 15/15Mbps at no additional cost, as the price remained at R 709.

Vodacom's amendment came to effect on 05 March 2021.

2.7.2.6. MWEB on Vumatel FTTH

MWEB filed amendments on its MWEB on Vumatel packages with the Authority on 25 February 2021, wherein it increased upload speeds, adjusted prices and terminated certain FTTH packages. MWEB on Vumatel no longer provides the 10/2Mbps and 20/2Mbps products, and customers previously on these products were migrated to the 10/10Mbps and 20/20Mbps products.

Table 52 below sets out the price and line speed amendments on a sample of MWEB on Vumatel FTTH packages.

Table 52: MWEB on Vumatel FTTH

Product Description	Previous Line Speed (Mbps)	Current Line Speed (Mbps)	Previous Price	Current Price	Price Difference	Variance (%)
Uncapped 10/2Mbps	10/2	10/10	R 639	R 689	R 50	7.8%
Uncapped 20/2Mbps	20/2	20/20	R 829	R 849	R 20	2.4%
Uncapped 10/10Mbps	N/A	N/A	R 739	R 689	-R 50	-6.8%
Uncapped 20/20Mbps	N/A	N/A	R 1 029	R 849	-R 180	-17.5%
100GB + Uncapped Night Time Data + 20Mbps	N/A	N/A	R 779	R 829	R 50	6.4%
200GB + Uncapped Night Time Data + 20Mbps	N/A	N/A	R 809	R 859	R 50	6.2%
100GB + Uncapped Night Time Data + 20/20Mbps Fibre	20/20	N/A	R 879	R 829	-R 50	-5.7%
200GB + Uncapped Night Time Data + 20/20Mbps	20/20	N/A	R 909	R 859	-R 50	-5.5%
500GB + Uncapped Night Time Data + 20/20Mbps	20/20	N/A	R 1 069	R 1 009	-R 60	-5.6%
100GB + Uncapped Night Time Data + 10/10Mbps Fibre	10/10	N/A	R 699	R 649	-R 50	-7.2%
200GB + Uncapped Night Time Data + 10/10Mbps	10/10	N/A	R 789	R 749	-R 40	-5.1%

Source: ICASA Database Based on Tariff Notifications

The Uncapped 10/10Mbps packages priced at R 689 on MWEB on Vumatel FTTH can be compared to the Cell C C-Fibre on Vumatel 10/10Mbps⁴² package which is

⁴² Page 87, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/bi-annual-tariffs-analysis-report-01-jul-to-31-dec-2020> > Accessed 20 August 2021

priced at R 799 or 16% more, thus the price reduction positively impacted customers. The amendments on MWEB on Vumatel FTTH came into effect on 01 April 2021.

2.7.2.7. Cell C C-Fibre Plan on Openserve FTTH

Cell C filed amendments on its Cell C C-Fibre on Openserve packages with the Authority on 25 February 2021, wherein it increased line speeds on certain FTTH packages. Customers on the pre-existing tariff plans were moved to the amended tariff plans and benefitted from the improved line speeds.

Table 53 below sets out the changes in line speeds on the Cell C C-Fibre Plan on Openserve.

Table 53: Cell C C-Fibre Plan on Openserve

Product Description	Previous Line Speed (Mbps)	Current Line Speed (Mbps)	Current Price
C-Fibre 25/25Mbps	10/10	25/25	R 699
C-Fibre 50/25Mbps	20/20	50/25	R 799
C-Fibre 100/50Mbps	50/25	100/50	R 899
C-Fibre 200/100Mbps	100/50	200/100	R 1 199

Source: ICASA Database Based on Tariff Notifications

The amended line speeds on the Cell C C-Fibre Plan on Openserve became effective on 01 March 2021.

2.7.2.8. Cybersmart on Openserve FTTH

On 25 February 2021, Cybersmart filed amendments to the Authority regarding various of its FTTH packages on the Openserve network. The amendments entailed increases in line speeds on certain packages with prices remaining unchanged.

Table 54 below sets out the line speed amendments on some of Cybersmart on Openserve FTTH packages.

Table 54: Cybersmart on Openserve FTTH

Previous Line Speed	Current Line Speed	Price
Cybersmart on Openserve Home Uncapped ADSL		
2Mbps	5Mbps	R 349
5Mbps	10Mbps	R 579
10Mbps	20Mbps	R 779
20Mbps	40Mbps	R 1 158
Cybersmart on Openserve Uncapped Lite Fibre		
10Mbps	25/25Mbps	R 529
20Mbps	50/25Mbps	R 699
50Mbps	100/50Mbps	R 899
100Mbps	200/100Mbps	R 1 099
200/100Mbps		
Cybersmart on Openserve Uncapped Premium Fibre		
10Mbps	25/25Mbps	R 629
20Mbps	50/25Mbps	R 799
50Mbps	100/50Mbps	R 999
100Mbps	200/100Mbps	R 1 199
200/100Mbps		

Source: ICASA Database Based on Tariff Notifications

Customers benefit from an effective doubling of line speeds on Cybersmart on Openserve FTTH. The upgraded Cybersmart on Openserve Uncapped Lite Fibre 25/25Mbps package can be compared to the Cell C C-Fibre on Openserve 25/25Mbps priced at R 699 or 32.1% more, thus Cybersmart customers positively benefit even at a comparative basis. The amendment of the Cybersmart on Openserve FTTH became effective on 01 March 2021.

2.7.2.9. Cybersmart on Frogfoot FTTH

Cybersmart filed a new FTTH product on its Cybersmart on Frogfoot network with the Authority on 25 February 2021, wherein it introduced a 20/2Mbps line speed package. The new line was priced at R 489, and it was available only to customers residing in the Tzaneen area of Limpopo.

The launch of the product became effective on 01 March 2021.

2.7.2.10. SADV on Vumatel Network FTTH

On 26 February 2021, SADV filed an amendment with the Authority wherein it discontinued certain packages and adjusted prices on certain FTTH packages.

Table 55 below sets out a sample of the price amendments on SADV on Vumatel FTTH.

Table 55: SADV on Vumatel Network FTTH

Product Description	Previous Price	Current Price	Price Difference	Variance (%)
Capped				
Access-res-capped-ff10	R 499	R 695	R 196	39.3%
Access-res-capped-ff20	R 849	R 895	R 46	5.4%
Access-res-capped-ff50	R 1 008	R 1 045	R 37	3.7%
Access-res-capped-ff100	R 1 399	R 1 275	-R 124	-8.9%
Standard Uncapped				
Access-res-unc-10-2	R 695	Discontinued	N/A	N/A
Access-res-unc-10-10	R 755	R 785	R 30	4%
Access-res-unc-20-2	R 845	Discontinued	N/A	N/A
Access-res-unc-20-20	R 915	R 955	R 40	4.4%
Reduced Subs Uncapped (Vumatel Network)				
Access-res-unc-red-10-2	R 625	Discontinued	N/A	N/A
Access-res-unc-red-10-10	R 695	R 725	R 30	4.3%
Access-res-unc-red-20-2	R 795	Discontinued	N/A	N/A
Access-res-unc-red-20-20	R 845	R 875	R 30	3.6%

Source: ICASA Database Based on Tariff Notifications

The largest price increase in absolute and percentage terms of R 196 or 39.3% occurred on the SADV on Vumatel capped ff10 package which negatively impacted customers. The SADV on Vumatel Standard Uncapped 10/10Mbps package can be compared with the Cell C C-Fibre on Vumatel 10/10Mbps FTTH priced at R 799 or 1.8% more. The amendment of the SADV on Vumatel Network FTTH became effective on 01 April 2021.

2.7.2.11. Amobia on Buh-Rein FTTH

Amobia filed an amendment to its Amobia on Buh-Rein FTTH packages with the Authority on 02 March 2021. There was a 10% increase across all fibre packages on the Amobia on Buh-Rein network. The price changes became effective on 15 March 2021.

Table 56 below sets out the price increases across the affected Amobia on Buh-Rein FTTH packages.

Table 56: Amobia on Buh-Rein FTTH

Product Description	Previous Price	Current Price	Price Difference	Variance (%)
5/5Mbps Capped 100GB	R 305	R 335	R 30	9.8%
10/10Mbps Capped 150GB	R 405	R 445	R 40	9.9%
4/2Mbps Uncapped	R 305	R 335	R 30	9.8%
8/2Mbps Uncapped	R 405	R 445	R 40	9.9%

Source: ICASA Database Based on Tariff Notifications

The Amobia on Buh-Rein 8/2Mbps FTTH package is comparable to the Amobia on Buh-Rein Estate 8/2Mbps FTTH⁴³ priced at R 405 or 9% less. The amendment to the Amobia on Buh-Rein FTTH became effective on 15 March 2021.

2.7.2.12. MTN Supersonic on Openserve FTTH

MTN filed an amendment to its Supersonic on Openserve FTTH with the Authority on 08 March 2021, wherein it discontinued all line speeds below 25Mbps services and revised the fibre packages on table 57 below.

Table 57: MTN Supersonic on Openserve FTTH

Previous Line Speed (Mbps)	Previous Subscription fee (Incl. VAT)	New Line Speed (Mbps)	New Subscription fee (Incl. VAT)	Price Difference	Price Difference (%)
40/20	R 955	50/25	R 849	-R 106	-11.1%

⁴³ Pages 70-71, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020> > Accessed 20 August 2021

100/50	R 1 195	100/50	R 1 049	-R 146	-12.2%
200/100	R 1 449	200/100	R 1 195	-R 254	-17.5%

Source: ICASA Database based on Tariff Notifications

MTN's new entry level package on the Openserve network is a symmetrical 25Mbps package priced at R 699. MTN also revised the prices of the fibre packages. For example, the 40/20Mbps line speed was increased to 50/25Mbps while the subscription fee reduced by R 106 or 11.1% from R 955 to R 849. Table 57 below shows MTN's migration plan for existing customers.

Table 58: Amendments to MTN Supersonic on Openserve FTTH

Previous Line Speed	Previous Price	New Line Speed	New Price
10Mbps	R 645	25Mbps	R 645
20Mbps	R 829	50Mbps	R 829
50Mbps	R 955	100Mbps	R 955
100Mbps	R 1 195	200Mbps	R 1 195
200Mbps	R 1 449	200Mbps	R 1 195

Source: ICASA Database based on Tariff Notifications

The table above shows that the existing customers on the 10Mbps services for example, were upgraded to 25Mbps whilst remaining at the 10Mbps price of R 645. MTN charges more for the 25/25Mbps package compared to the Vodacom Fibre on Openserve, which charges R 599 (i.e., R 46 or 7.1% less) for the same line speed. MWEB, on the other hand, charges R 659 for the 25/25Mbps package on the Openserve network, which is R 14 (or 2.2%) and R 60 (or 10%) more than MTN and Vodacom charge for a similar package, respectively.

The operator's amendment was filed in terms of the ICT COVID-19 National Disaster Regulations and therefore came to effect on 10 March 2021.

2.7.2.13. Cell C C-Fibre Baobab Plan FTTH

On 12 March 2021, Cell C filed its Cell C C-Fibre Baobab Plan with the Authority. The Plan offered Cell C customers a month-to-month uncapped C-Fibre service in partnership with Baobab, which was the fibre network operator (FNO) providing the fibre network on an open access model.

Table 59 below sets out the prices of the packages on the Cell C C-Fibre Baobab Plan.

Table 59: Cell C C-Fibre Baobab Plan

Product Description	Price
C-Fibre 4Mbps/4Mbps	R 439
C-Fibre 10Mbps/10Mbps	R 729
C-Fibre 20Mbps/20Mbps	R 839
C-Fibre 50Mbps/50Mbps	R 939
C-Fibre 100Mbps/100Mbps	R 1 139

Source: ICASA Database based on Tariff Notifications

The Cell C C-Fibre Baobab Plan was launched on the market on 19 March 2021.

2.7.2.14. Cell C C-Fibre on Vumatel FTTH

Cell C filed amendments on its Cell C C-Fibre on Vumatel packages with the Authority on 18 March 2021, wherein it introduced new FTTH packages to the plan.

Table 60 below sets out the new FTTH packages on the Cell C C-Fibre on Vumatel plan.

Table 60: Cell C C-Fibre on Vumatel FTTH

FTTH Packages	Price
20/20Mbps	R 949
50/50Mbps	R 1 099
100/100Mbps	R 1 199
20/20Mbps	R 1 419
1000/100Mbps	R 1 499

Source: ICASA Database based on Tariff Notifications

The Cell C-Fibre on Vumatel FTTH offers customers download speeds ranging from 20Mbps to 1Gbps and upload speeds ranging from 20Mbps to 100Mbps. Cell C's C-Fibre on Vumatel 100/100Mbps package can be compared to similar packages in the market, namely the MWEB on Vumatel Uncapped 100/100Mbps FTTH⁴⁴

⁴⁴ Page 84-85, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/bi-annual-tariffs-analysis-report-01-jul-to-31-dec-2020> > Accessed 20 August 2021

priced which costs 17.5% more at R 1 409. The amendment of line speeds on Cell C C-Fibre on Vumatel FTTH became effective on 01 April 2021.

2.7.2.15. MWEB on Frogfoot Fibre FTTH

MWEB filed an amendment to its Frogfoot FTTH which replaced the Frogfoot Double Data Promo. The amendments on the Frogfoot FTTH brought lower prices and faster line speeds on selected packages that existed in the previous Frogfoot Double Data Promo.

Table 61 below sets out a sample of the amended line speeds and prices of the MWEB on Frogfoot FTTH.

Table 61: MWEB on Frogfoot FTTH

Previous Line Speed (Mbps)	Current Line Speed (Mbps)	Previous Price	Previous Price	Difference	Variance
10/10	30/30	R 939	R 839	-R 100	-10.6%
20/20	50/50	R 729	R 699	-R 30	-4.1%
200/200	200/200	R 849	R 819	-R 30	-3.5%
100/10	100/10	R 1 099	R 1 049	-R 50	-4.5%
Asynchronous Uncapped					
10/5	30/3	R 599	R 599	R 0	0%
20/2	50/5	R 699	R 699	R 0	0%
50/5	100/10	R 839	R 839	R 0	0%
100/10	100/10	R 939	R 939	R 0	0%
Synchronous Uncapped					
10/10	30/30	R 729	R 699	-R 30	-4.1%
20/20	50/50	R 849	R 819	-R 30	-3.5%
50/50	100/100	R 929	R 929	R 0	0%
100/100	200/200	R 1 049	R 1 049	R 0	0%

Source: ICASA Database Based on Tariff Notifications

The removal of the Frogfoot Double Data meant that customers only benefit if they are on a package which either reduced the price or upgraded line speeds. Price decreases ranged from -4.1% on the 50/50Mbps package to -10.6% on the 30/30Mbps package. The amendments on MWEB on Frogfoot FTTH became effective on 01 May 2021.

2.7.2.16. Cell C on Frogfoot Fibre Plan

Cell C filed an amendment to its FTTH packages on Frogfoot networks with the Authority on 12 April 2021. The amendments entailed price decreases and line speed adjustments which was to the benefit of customers. Table 62 details the amendments to the prices and improvements in line speeds on the Cell C on Frogfoot Fibre Plan.

Table 62: Cell C on Frogfoot Fibre Plan

Product Description	Previous Line Speed (Mbps)	Current Line Speed (Mbps)	Previous Price	Current Price	Price Difference	Variance (%)
C-Fibre 30/30Mbps	10/10	30/30	R 859	R 729	-R 130	-15.1%
C-Fibre 50/50Mbps	20/20	50/50	R 909	R 839	-R 70	-7.7%
C-Fibre 100/100Mbps	50/50	100/100	R 959	R 929	-R 30	-3.1%
C-Fibre 200/200Mbps	100/100	200/200	R 1 059	R 1 049	-R 10	-0.9%
C-Fibre 200/200Mbps	N/A	N/A	R 1 159	R 1 049	-R 110	-9.5%
C-Fibre 500/500Mbps	N/A	N/A	R 1 469	R 1 399	-R 70	-4.8%
C-Fibre 1GB/100Mbps	N/A	N/A	R 1 979	R 1 599	-R 380	-19.2%

Source: ICASA Database Based on Tariff Notifications

The 1GB/100Mbps package had the largest decrease in both percentage and absolute terms, as it decreased by 19.2% or by R 380 in absolute terms from R 1 979 to R 1 599. The Cell C on Frogfoot C-Fibre 200/200Mbps FTTH package can be compared to the MWEB on Frogfoot Uncapped 200/200Mbps FTTH⁴⁵ package which is priced at R 1099 or 4.8% more. Cell C's amendment to the Frogfoot Fibre Plan came into effect on 01 May 2021.

2.7.2.17. Directel on Openserve FTTH

Directel Communications ("Directel") filed an amendment to its FTTH packages on Openserve networks with the Authority on 13 April 2021. The amendments entailed price decreases across all packages to the benefit of customers, leading to them incurring less costs to communicate.

⁴⁵ Page 69, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/bi-annual-tariffs-analysis-report-01-jul-to-31-dec-2020> > Accessed on 20 August 2021

Table 63 below sets out the price decreases across the Directel on Openserve FTTH packages.

Table 63: Directel on Openserve FTTH

Package	Previous Price	New Price	Difference	Variance
Apollo 25/25	R 695	R 595	-R 100	-14.4%
Apollo 50/25	R 895	R 795	-R 100	-11.2%
Apollo 100/50	R 995	R 895	-R 100	-10.1%
Apollo 200/100	R 1 295	R 995	-R 300	-23.2%

Source: ICASA Database Based on Tariff Notifications

The 200/100Mbps package realised the largest decrease in both percentage and absolute terms, as it decreased by -23.2% or by R 300 in absolute terms from R 1 295 to R 995. The Directel on Openserve Apollo 25/25 FTTH package can be compared to the Cell C C-Fibre on Openserve 25/25Mbps FTTH package which is priced at R 699 or 17.5% higher. Directel's price amendment to its Openserve FTTH came into effect on 01 May 2021.

2.7.2.18. Amobia on Frogfoot FTTH Packages

Amobia filed an amendment to its FTTH packages on the Frogfoot network with the Authority on 15 April 2021. The amendment entailed price decreases across all packages.

Table 64 below sets out the price decreases across the Amobia on Frogfoot FTTH packages.

Table 64: Amobia on Frogfoot FTTH Packages

Products	Previous Price	Current Price	Price Difference	Price Difference (%)
50/5Mbps	R 835	R 735	-R 100	-12%
50/50Mbps	R 895	R 805	-R 90	-10.1%
100/10Mbps	R 935	R 835	-R 100	-10.7%
100/100Mbps	R 995	R 915	-R 80	-8%
200/200Mbps	R 1 095	R 1 105	R 10	1%

Source: ICASA Database Based on Tariff Notifications

The largest decrease in percentage terms occurred on the 100/10Mbps package which realised a price decrease of 10.7%. The only price increase occurred on the 200/200Mbps package which increased by 1%. The Amobia on Frogfoot FTTH 100/100Mbps package can be compared to similar products in the market, for example the Directel on Frogfoot 100/100Mbps FTTH⁴⁶ package which priced at R 1 045 or 14.2% higher. The amendments on Amobia on Frogfoot FTTH Packages were made effective on 28 April 2021.

2.7.2.19. Cybersmart on Openserve Uncapped Lite Fibre

Cybersmart filed an amendment to its Openserve Uncapped Lite Fibre with the Authority on 27 April 2021. The amendment entailed a price decrease of the 25/25Mbps package by R 31 or 5.9%, from R 529 to R 498.

The amendments became effective on 10 May 2021.

2.7.2.20. Vodacom Fibre on Vuma Reach Network

On 28 April 2021, Vodacom filed an amendment to its prepaid fibre plan on the Vuma Reach network with the Authority. Vodacom initially filed the plan on 21 July 2020, wherein it offered customers the uncapped 20/10Mbps line speed fibre plan on a once-off or recurring basis for R 399 per month. The operator has increased the subscription fee by R 30 or 7.5% to R 429 per month. Customers are offered a 20/10Mbps fibre service on a prepaid Vuma Reach Network plan, which is available as a 28-day or monthly recurring service. This plan offers uncapped fibre internet connectivity; however, it is subject to Fair Usage Policy (FUP), which can be found on Vodacom's website⁴⁷. Vodacom's amendment was

⁴⁶ Page 70, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/bi-annual-tariffs-analysis-report-01-jul-to-31-dec-2020> > Accessed 20 August 2021

⁴⁷ Available online at: < <https://www.vodacom.co.za/vodacom/terms/fibre/vodacom-fibre> > Accessed 23 August 2021.

filed in terms of the ICT COVID-19 National Disaster Regulations and therefore came to effect on 29 April 2021.

2.7.2.21. Cipherwave All Home-Connect FTTH Packages on Frogfoot

Cipherwave Networks filed its All Home-Connect FTTH Packages on the Frogfoot Fibre Network with the Authority on 05 May 2021. The product offered customers a 3 months' free subscription on the Frogfoot Fibre Network when signing up for the All Home-Connect FTTH Packages on the Frogfoot Fibre Network during the period of the promotion. Customers will be charged standard rates after the 3-month period, and therefore benefit through financial relief for a period of 3 months.

The promotion was available in the market from 18 May 2021 to 31 July 2021.

2.7.2.22. Telkom on Frogfoot FTTH

The amendment of the Telkom on Frogfoot FTTH was filed with the Authority on 07 May 2021. The amendment entailed line speed increases on the Frogfoot FTTH.

Table 65 below sets out a sample of the line speed amendments on Telkom on Frogfoot FTTH.

Table 65: Telkom on Frogfoot FTTH

Softcap			
Product Name	Current Line Speed	New Line Speed	Price
30/30Mbps Softcap 100GB	10Mbps	30Mbps	R 659
Unlimited Home			
30/30Mbps Unlimited Home	10Mbps	30Mbps	R 799
50/50Mbps Unlimited Home	20Mbps	50Mbps	R 899
Unlimited Home Lite			
100/10Mbps Unlimited Home Lite	50Mbps	100/10Mbps	R 899
200/20Mbps Unlimited Home Lite	100Mbps	200/20Mbps	R 949

Source: ICASA Database Based on Tariff Notifications

Customers benefit from the effective doubling of line speeds without corresponding price increases, therefore reducing the cost to communicate on the Frogfoot network. The Telkom on Frogfoot 50/50Mbps Unlimited Home FTTH can be compared to the Cybersmart on Frogfoot 50/50Mbps, priced at R 889 or 1.1% less. The amendments became effective on 18 May 2021.

2.7.2.23. MWEB on Century City Connect FTTH

On 11 May 2021, MWEB filed new packages on its Century City Connect FTTH. The new packages will be available to customers outside of the Century City and Clara Anna Fontein areas. The introduction of the new packages does not cancel the currently existing packages in the Century City and Clara Anna Fontein areas. The new product entails monthly uncapped FTTH packages ranging from 20Mbps to 1000Mbps.

Table 66 below sets out the packages and prices on the new MWEB on Century City Connect FTTH.

Table 66: MWEB on Century City Connect FTTH

Product Description	Price
Uncapped 20Mbps	R 679
Uncapped 50Mbps	R 899
Uncapped 100Mbps	R 1 049
Uncapped 200Mbps	R 1 179
Uncapped 500Mbps	R 1 399
Uncapped 1000Mbps	R 1 899

Source: ICASA Database Based on Tariff Notifications

The Uncapped 50Mbps package on MWEB on Century City priced at R 899 can be compared to the Cell C C-Fibre on Octotel 50/50Mbps package which is priced 5.6% lower at R 849. The MWEB on Century City Connect FTTH became effective on 01 June 2021.

2.7.2.24. MWEB on MetroFibre Networkx

On 11 May 2021, MWEB filed an amendment of its Metrofibre Networkx FTTH. The amendment entailed an increase of line speeds on all packages and the addition of a new 300/300Mbps package.

Table 67 below sets out the line speed amendments and the new package on MWEB on Metrofibre Networkx FTTH.

Table 67: MWEB on MetroFibre Networkx FTTH

Current Line Speed	New Line Speed	Unchanged Price
10/10Mbps	25/25Mbps	R 649
25/25Mbps	50/50Mbps	R 829
50/50Mbps	100/100Mbps	R 999
100/100Mbps	200/200Mbps	R 1 199
N/A	300/300Mbps	R 1 349

Source: ICASA Database Based on Tariff Notifications

Customers benefit from the upgrade of lines speeds without a corresponding price increase across all FTTH packages on MWEB on MetroFibre Networkx. The MWEB on MetroFibre Networkx 200/200Mbps FTTH⁴⁸ package was priced at R 1 399; the upgrade of the MWEB on MetroFibre Networkx 100/100Mbps FTTH package to 200/200Mbps with the price remaining unchanged at R 1 199, is therefore a benefit for customers. The amendments of the MWEB on MetroFibre Networkx FTTH came into effect on 01 June 2021.

2.7.2.25. Directel on MetroFibre FTTH

Directel filed amendments to its Directel on Metrofibre FTTH with the Authority on 12 May 2021. The amendments entailed price decreases, the termination of certain packages and the introduction of new packages.

⁴⁸ Page 84, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/bi-annual-tariffs-analysis-report-01-jul-to-31-dec-2020> > Accessed 20 August 2021

Table 68 below sets out the price decreases and the new packages available on Directel on MetroFibre FTTH.

Table 68: Directel on MetroFibre FTTH

New Pricing & Package				
Package	Current Price	New Price	Difference	Variance
Apollo 25	R 795	R 655	-R 140	-17.6%
Apollo 50	R 995	R 795	-R 200	-20.1%
Apollo 100	R 1 195	R 995	-R 200	-16.7%
Apollo 300	N/A	R 1 495	N/A	N/A
New Packages				
Existing Package	Upgraded Package	Current Line Speed	New Line Speed	
Apollo 10	Apollo 25	10Mbps	25Mbps	
Apollo 25	Apollo 50	25Mbps	50Mbps	
Apollo 50	Apollo 100	50Mbps	100Mbps	

Source: ICASA Database Based on Tariff Notifications

The largest decrease in both absolute and percentage terms occurred on the Apollo 50 package which realised a price decrease of R 200 or 20%. Customers benefit from the amendments through an upgrading of line speeds while prices decreased across all packages, this therefore reduced the cost to communicate for customers. Customers also benefit from a wider choice of packages through the introduction of a 300Mbps package.

These amendments came into effect on 01 June 2021.

2.7.2.26. Amobia on Vumatel FTTH

Amobia filed amendments to its Amobia on Vumatel FTTH with the Authority on 17 May 2021. The Amobia on Vumatel FTTH was originally filed with the Authority on 04 June 2020 and analysed in the Q2 2020/2021 Bi-Annual Tariff Analysis Report⁴⁹. The amendments entailed price adjustments, the termination, and the

⁴⁹ Page 76, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020> > Accessed 20 August 2021

introduction of new packages. Amobias introduced additional FTTH packages on the Vumatel network, offering customers more choice in the market.

Table 69 below sets out the amendments on the Amobias on Vumatel FTTH.

Table 69:Amobias on Vumatel FTTH

Product Description	Current Price	New Price	Difference	Variance
200/20Mbps	R 1 189	R 1 199	R 10	0.8%
200/100Mbps	R 1 299	N/A	N/A	N/A

Source: ICASA Database Based on Tariff Notifications

Customers benefit from the amendment through the introduction of new packages. The marginal price increase of 0.8% on the 200/20Mbps package negatively affected customers as it increased the cost to communicate. Customers benefit from a wider choice of packages through the introduction of new FTTH packages.

The amendment of Amobias on Vumatel FTTH became effective on 01 June 2021.

2.7.2.27. MTN Supersonic on Light Tree FTTH at Villa Italia

MTN filed its Supersonic FTTH packages on the Light Tree network with the Authority on 18 May 2021, wherein it offers Villa Italia residents asymmetrical fibre packages. Table 70 below the fibre packages on the Light Tree network.

Table 70:Supersonic Light Tree at Vanilla Italia

Line Speed (Mbps)	Retail Pricing (Incl. VAT)
10/5	R 549
20/10	R 649
50/25	R 749
100/50	R 899
200/50	R 1 195
400/100	R 1 399
1000/100	R 1 599

Source: ICASA Database based on Tariff Notifications

MTN offers the offers Villa Italia residents asymmetrical fibre packages with download speeds ranging from 10Mbps to 1Gbps, and upload speeds ranging from 5Mbps to 100Mbps. The 20/10Mbps line speed, for an example, is offered for R 649 per month.

MTN's Supersonic on Light Tree at Villa Italia was filed in terms of the ICT COVID-19 National Disaster Regulations and came to effect on 20 May 2021.

2.7.2.28. Vodacom Fibre on Frogfoot

Vodacom filed an amendment to its Fibre Broadband on the Frogfoot network with the Authority on 24 May 2021, wherein it increased the line speeds of the fibre packages and revised the subscription fees thereof. Table 71 below shows the amendment to the fibre packages in detail.

Table 71: Vodacom Fibre Broadband on Frogfoot

Current Line Speed (Mbps)	Revised Line Speed (Mbps)	Monthly Data Allocation	Current Monthly Subscription (Incl. VAT)	Revised Monthly Subscription (Incl. VAT)	Price Difference (%)	Variance (%)
5/5	10/5	50GB	R 599	R 569	-R 30	-5%
5/5	10/5	Uncapped	R 609	R 579	-R 30	-4.9%
10/1	30/3	Uncapped	-	R 599	N/A	N/A
10/10	30/30	Uncapped	R 659	R 699	R 40	6.1%
20/2	50/5	Uncapped	R 759	R 799	R 40	5.3%
20/20	50/50	Uncapped	R 819	R 849	R 30	3.7%
50/5	100/10	Uncapped	R 859	R 899	R 40	4.7%
50/50	100/100	Uncapped	R 909	R 949	R 40	4.4%
100/10	200/20	Uncapped	R 959	R 999	R 40	4.2%
100/100	200/200	Uncapped	R 1 009	R 1 099	R 90	8.9%

Source: ICASA Database based on Tariff Notifications

It can be seen from the table that some packages realised a tariff decrease. For example, Vodacom increased the 5/5Mbps line speed to 10/5Mbps while the price realised a R 30 or 4.9% decrease from R 609 to R 579. On the other hand, a number of packages realised a tariff increase. For example, Vodacom increased the 10/10Mbps line speed to 30/30Mbps and increase the price by R 60 or 6.1% from R 659 to R 699.

It should be noted that Cell C offers a similar 30/30Mbps package on the Frogfoot network for R 729, which is R 30 or 4.3% higher than what Vodacom charges. On the other hand, Vodacom charges R849 for the 50/50Mbps package which is R 10 or 1.2% more than what Cell C charges for its 50/50Mbps package, priced at R 839.

Vodacom's amendment to the Fibre Broadband on Frogfoot was filed in terms of the ICT COVID-19 National Disaster Regulations and therefore came to effect on 26 May 2021.

2.7.2.29. Cell C Metro Fibre Plan

Cell C filed an amendment of its Metro Fibre Plan with the Authority on 24 May 2021. The amendment entailed an upgrade of line speed across all packages on the Cell C Metro Fibre Plans.

Table 72 below sets out the line speed upgrades on the Cell C Metro Fibre Plans.

Table 72: Cell C Metro Fibre Plans

Product Description	Metro Fibre Plan		Price
	Current Line Speed	New Line Speed	
C-Fibre 25/25Mbps	10/10Mbps	25/25Mbps	R 719
C-Fibre 50/50Mbps	20/20Mbps	50/50Mbps	R 849
C-Fibre 100/100Mbps	50/50Mbps	100/100Mbps	R 999
C-Fibre 200/200Mbps	100/100Mbps	200/200Mbps	R 1 199
C-Fibre 300/300Mbps	200/200Mbps	300/300Mbps	R 1 499

Source: ICASA Database Based on Tariff Notifications

Customers benefit from an upgrade in line speed while prices remained unchanged, this reduced the cost to communicate for customers. The amendments became effective on 01 June 2021.

2.7.2.30. Amobia on Frogfoot FTTH Packages – Uncapped Packages

Amobia filed the Amobia on Frogfoot FTTH Packages – Uncapped Packages with the Authority on 01 June 2021, wherein it introduced a 10/5Mbps FTTH line speed package. The new FTTH package was priced at R 525 and was available only to customers residing in approved retirement villages.

Table 73 below sets out the price and line speeds available on the Amobia on Frogfoot FTTH Packages – Uncapped Packages.

Table 73: Amobia on Frogfoot FTTH Packages - Uncapped Packages

Product Description	Price
10/5Mbps Uncapped	R 525

Source: ICASA Database Based on Tariff Notifications

The Amobia on Frogfoot 10/5Mbps FTTH package is comparable to the Vodacom 10/5Mbps FTTH package on Frogfoot which is priced at R 569 or 8.4% higher. The Amobia on Frogfoot FTTH Packages – Uncapped Packages was launched on 10 June 2021.

2.7.2.31. Cybersmart on Frogfoot FTTH

Cybersmart's amendment to its Cybersmart on Frogfoot FTTH was filed with the Authority on 01 June 2021. The amendments entailed price decreases, the termination and the introduction of new FTTH packages on the Frogfoot network.

Table 74 below sets out the price decreases and the new packages available on Cybersmart on Frogfoot FTTH.

Table 74: Cybersmart on Frogfoot FTTH

Product Description	Current Price	New Price	Difference	Variance
30/30Mbps (new product)	N/A	R 595	N/A	N/A
50/50Mbps	R 889	R 795	-R 94	-10.6%

100/100Mbps	R 989	R 895	-R 94	-9.5%
200/200Mbps	R 1 039	R 995	-R 44	-4.2%
500/500Mbps	R 1 389	R 1 295	-R 94	-6.8%
Termination Products				
Terminated Products		Price		
10/10Mbps		R 749		
20/20Mbps		R 809		
1000/1000Mbps		R 1 789		

Source: ICASA Database Based on Tariff Notifications

The largest decrease in both absolute and percentage terms occurred on the 50/50Mbps package which realised a price decrease of R 94 or 11%. A new 30/30Mbps package was introduced on Cybersmart on Frogfoot FTTH, while the 10/10, 20/20 and 1000/1000Mbps packages were terminated.

Customers benefit from the amendments through the introduction of new packages and price decreases across all packages. The price reductions reduced the cost to communicate for customers. Customers also benefit from a wider choice of packages through the introduction of a 30/30Mbps package.

The amendments will become effective on 17 June 2021.

2.7.2.32. MWEB FTTH

MWEB filed an amendment to its FTTH packages with the Authority on 23 June 2021. Fibre packages on the Vumatel, Century City Connect, Link Layer, Octotel, MetroFibre Networkx and Openserve network realised tariff and line speed changes.

Table 75 below sets out a sample of the changes in line speeds and tariffs on MWEB FTTH packages.

Table 75: MWEB FTTH

Vumatel					
Product Description	New Line Speed	Previous Price	Current Price	Price Difference	Variance (%)
Uncapped 10/10	20/10Mbps	R 689	R 689	R 0	0%
Uncapped 20/20	50/20Mbps	R 849	R 849	R 0	0%
Century City Connect					

Product Description	New Line Speed	Previous Price	Current Price	Price Difference	Variance (%)
Uncapped 10/5Mbps	20/10Mbps	R 529	R 499	-R 30	-5.7%
Uncapped 20/10Mbps	50/25Mbps	R 729	R 639	-R 90	-12.3%
Link Layer					
Product Description	New Line Speed	Previous Price	Current Price	Price Difference	Variance (%)
Uncapped 10/10	25/25Mbps	R 659	R 589	-R 70	-10.6%
Uncapped 20/20	50/50Mbps	R 859	R 789	-R 70	-8.1%
Octotel					
Product Description	New Line Speed	Previous Price	Current Price	Price Difference	Variance (%)
Uncapped 15/15	35/25Mbps	R 679	R 639	-R 40	-5.9%
Uncapped 30/30	50/50Mbps	R 779	R 749	-R 30	-3.9%
MetroFibre Network					
Product Description	New Line Speed	Previous Price	Current Price	Price Difference	Variance (%)
Uncapped 50/50	50/50Mbps	R 829	R 799	-R 30	-3.6%
Uncapped 100/100	100/100Mbps	R 999	R 979	-R 20	-2.0%
Openserve					
Product Description	New Line Speed	Previous Price	Current Price	Price Difference	Variance (%)
Uncapped 25/25	25/25Mbps	R 659	R 629	-R 30	-4.6%
Uncapped 50/25	50/25Mbps	R 929	R 829	-R 100	-10.8%

Source: ICASA Database Based on Tariff Notifications

As shown in table 75 above, the highest price decrease was 12.3% which was for the Uncapped 20/20Mbps on MWEB on Century City Connect. The amendment of the MWEB FTTH became effective on 01 July 2021.

2.7.2.33. Cell C C-Fibre LinkLayer Network

Cell C filed amendments on its Cell C C-Fibre LinkLayer Network with the Authority on 23 June 2021, wherein it increased line speeds and prices on certain FTTH packages. Customers on the pre-existing tariff plans were moved to the amended tariff plans and benefitted from the improved line speeds although they experienced price increases.

Table 76 below sets out the changes in line speeds and prices on the Cell C C-Fibre LinkLayer Network.

Table 76: Cell C C-Fibre LinkLayer Network

C-Fibre LinkLayer					
Product Description	New Line Speed	Previous Price	Current Price	Price Difference	Variance
C-Fibre 10/10Mbps	25/25Mbps	R 729	R 799	R 70	9.6%
C-Fibre 20/20Mbps	50/50Mbps	R 859	R 929	R 70	8.1%
C-Fibre 50/50Mbps	100/100Mbps	R 999	R 1 049	R 50	5%
C-Fibre 100/100Mbps	200/200Mbps	R 1 199	R 1 249	R 50	4.2%
C-Fibre 200/200Mbps	300/300Mbps	R 1 299	R 1 399	R 100	7.7%

Source: ICASA Database Based on Tariff Notifications

Customers received a doubling of line speeds on all packages with the exception of the C-Fibre 200/200Mbps package, while only experiencing price increases ranging from 4.2-9.6%. The largest price increase in percentage terms occurred on the 10/10Mbps package which saw a 9.6% increase; however, customers experienced an upgrade in line speeds. The Cell C C-Fibre LinkLayer 50/50Mbps FTTH package can be compared to the MTN Supersonic Fibre LinkLayer 50/50Mbps FTTH⁵⁰ which is priced at R 995 or 0.4% lower. The amendment of the Cell C C-Fibre LinkLayer Network became effective on 01 July 2021.

2.7.2.34. Cell C C-Fibre on Octotel Tariff Plan

Cell C filed amendments on its Cell C C-Fibre on Octotel Tariff Plan with the Authority on 23 June 2021, wherein it terminated and introduced new line speeds on certain FTTH packages. Customers were migrated from the 15Mbps and 30Mbps packages to new upgraded packages without price increases. Customers benefitted from the upgrade in line speeds.

Table 77 below sets out the upgrades in line speeds on the Cell C C-Fibre on Octotel Tariff Plan.

Table 77: Cell C C-Fibre on Octotel Tariff Plan

C-Fibre on Octotel			
Product Description	New Line Speed	Previous Price	Current Price

⁵⁰ Page 86, available on ICASA's website < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020> > Accessed 20 August 2021

C-Fibre 15/15Mbps	30/25Mbps	R 729	R 729
C-Fibre 30/30Mbps	50/50Mbps	R 849	R 849

Source: ICASA Database Based on Tariff Notifications

The line speed upgrade on Cell C C-Fibre on Octotel is comparatively to the benefit of customers, for instance the upgraded Cell C C-Fibre 50/50Mbps FTTH, is priced R 849, whilst MTN's Supersonic on Octotel Fibre 30/30Mbps FTTH package is priced at R 899 or 5.9% higher while offering lower line speeds. The amendment of the Cell C C-Fibre on Octotel Tariff Plan became effective on 01 July 2021.

2.7.2.35. Cell C C-Fibre on Vumatel Tariff Plan

Cell C filed amendments on its Cell C C-Fibre on Vumatel Tariff Plan with the Authority on 23 June 2021, wherein it terminated, introduced new line speeds and reduced prices on certain FTTH packages. Customers were either migrated to new upgraded packages or experienced price reductions. Customers benefit from either an upgrade in line speeds or price reductions.

Table 78 below sets out the upgrades in line speeds and price reductions on the Cell C C-Fibre on Vumatel Tariff Plan.

Table 78: Cell C C-Fibre on Vumatel Tariff Plan

C-Fibre Vumatel					
Product Description	New Line Speed	Previous Price	Current Price	Price Difference	Variance (%)
C-Fibre 10/10Mbps	20/20Mbps	R 799	R 799	R 0	0%
C-Fibre 20/20Mbps	50/50Mbps	R 949	R 949	R 0	0%
C-Fibre 100/100Mbps	100/100Mbps	R 1 199	R 1 099	-R 100	-8.3%
C-Fibre 200/200Mbps	200/200Mbps	R 1 419	R 1 299	-R 120	-8.5%
C-Fibre 1Gbps/100Mbps	1Gbps/200Mbps	R 1 499	R 1 469	-R 30	-2%
	1Gbps/500Mbps	N/A	R 2 299	N/A	N/A

Source: ICASA Database Based on Tariff Notifications

The largest price reductions in absolute and percentage terms occurred on the 200/200Mbps package which decreased by R 120 or 8.5%. The Cell C C-Fibre on Vumatel 20/20Mbps FTTH package can be compared to the MWEB on Vumatel

20/20Mbps FTTH package⁵¹ which is priced at R 1 029 or 8.4% higher. The amendment of the Cell C C-Fibre on Vumatel Tariff Plan became effective on 01 July 2021.

2.7.2.36. Directel on Vumatel FTTH

Directel filed amendments to its Directel on Vumatel FTTH with the Authority on 23 June 2021. The amendments entailed price decreases, the termination of certain packages, line speed upgrades and the introduction of new packages. An effective doubling of line speeds occurred across all packages as well as the introduction of packages.

Table 79 below sets out the price decreases and the new packages available on Directel on Vumatel FTTH.

Table 79: Directel on Vumatel FTTH

New Pricing & Package				
Package	Current Price	New Price	Difference	Variance
Apollo 20/10	N/A	R 725	N/A	N/A
Apollo 50/50	R 1 045	R 895	-R 150	-14.4%
Apollo 100/100	R 1 245	R 1 045	-R 200	-16.1%
Apollo 200/200	R 1 495	R 1 245	-R 250	-16.7%
New Packages				
Existing Package	Upgraded Package	Current Line Speed	New Line Speed	
Apollo 10/10	Apollo 20/10	10/10Mbps	20/10Mbps	
Apollo 20/20	Apollo 50/50	20/20Mbps	50/50Mbps	
Apollo 50/50	Apollo 100/100	50/50Mbps	100/100Mbps	
Apollo 100/100	Apollo 200/200	100/100Mbps	200/200Mbps	
Apollo 200/200	Apollo 1000/200	200/200Mbps	1000/200Mbps	

Source: ICASA Database Based on Tariff Notifications

The largest decrease in both absolute and percentage terms occurred on the Apollo 200/200 package which realised a price decrease of R 250 or 16.7%. Customers benefit from the amendments through an upgrading of line speeds while prices decreased for some packages, this reduced the cost to communicate for

⁵¹ Page 67, available on ICASA's website < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020> > Accessed 20 August 2021

customers. Customers also benefit from a wider choice of packages through the introduction of the 1000/200Mbps package. The amendment of the Directel on Vumatel FTTH became effective on 01 July 2021.

2.7.2.37. Cybersmart Lightspeed Home Fibre

Cybersmart filed the Cybersmart Lightspeed Home Fibre with the Authority on 25 June 2021. The Cybersmart Lightspeed Home Fibre consists of two new line speeds on the Lightspeed infrastructure for customers in Parklands, Western Cape.

Table 80 below sets out the prices and line speeds available on the Cybersmart Home Fibre.

Table 80: Cybersmart Lightspeed Home Fibre

Product Description	Price
50Mbps	R 399
500Mbps	R 499

Source: ICASA Database Based on Tariff Notifications

The launch date of the Cybersmart Lightspeed Home Fibre was 12 July 2021.

2.7.2.38. Amobia on Buh-Rein FTTH

Amobia filed an amendment to its Amobia on Buh-Rein FTTH packages with the Authority on 25 June 2021. The amendment entailed an upgrade of line speeds and a decrease in prices on certain fibre packages on the Amobia on Buh-Rein network.

Table 81 below sets out the changes in terms of line speed and price which was across the affected Amobia on Buh-Rein FTTH packages.

Table 81: Amobia on Buh-Rein FTTH

Buh-Rein FTTH					
Product Description	New Line Speed	Previous Price	Current Price	Price Difference	Variance (%)

8/2Mbps	15/7.5Mbps	N/A	R 445	N/A	N/A
10/5Mbps	30/15Mbps	N/A	R 505	N/A	N/A
10/10Mbps	30/30Mbps	N/A	R 555	N/A	N/A
20/5Mbps	50/25Mbps	N/A	R 610	N/A	N/A
20/20Mbps	50/50Mbps	R 850	R 720	-R 130	-15.3%

Source: ICASA Database Based on Tariff Notifications

The 20/5Mbps line speed was effectively upgraded by double the line speeds across all packages on Amobia on Buh-Rein FTTH without any price change. The amendment of the Amobia on Buh-Rein FTTH will become effective on 01 August 2021.

2.7.2.39. Amobia on Vumatel FTTH

Amobia filed amendments to its Amobia on Vumatel FTTH with the Authority on 25 July 2021. The amendments entailed upgrades to line speeds and price decreases on certain packages.

Table 82 below sets out the line speed upgrades and price decreases on the Amobia on Vumatel FTTH.

Table 82: Amobia on Vumatel FTTH

Product Description	New Line Speed	Previous Price	Current Price	Price Difference	Variance (%)
10/10Mbps	20/10Mbps	N/A	R 649	N/A	N/A
20/20Mbps	50/50Mbps	R 949	R 799	-R 150	-15.8%
100/100Mbps	-	R 1 149	R 999	-R 150	-13.1%
200/200Mbps	50/25Mbps	R 1 299	R 1 189	-R 110	-8.5%

Source: ICASA Database Based on Tariff Notifications

The largest price reduction occurred on the Amobia on Vumatel upgraded 50/50Mbps package of 15.8%, which positively impacted customers. The amendment on Amobia on Vumatel FTTH became effective on 10 July 2021.

2.7.2.40. Directel on Octotel FTTH

Directel filed an amendment to its FTTH packages on Octotel networks with the Authority on 28 June 2021. The amendments entailed line speed upgrades on certain packages without a price increase.

Table 83 below sets out the price decreases across the Directel on Openserve FTTH packages.

Table 83: Directel on Octotel FTTH

Existing Package	Upgraded Package	Price
Apollo 15	Apollo 35	R 695
Apollo 30	Apollo 50	R 895

Source: ICASA Database Based on Tariff Notifications

The amendment of Directel on Octotel FTTH became effective on 01 July 2021.

2.7.2.41. Directel on Zoom FTTH

Directel filed an amendment to its FTTH packages on the Zoom network with the Authority on 28 June 2021. The amendments entailed line speed upgrades and a price decrease on certain packages.

Table 84 below sets out the line speed upgrades and price decrease on the Directel on Zoom FTTH packages.

Table 84: Directel on Zoom Fibre

New Pricing & Package				
Package	Current Price	New Price	Difference	Variance
Apollo 200	R 1 195	R 1 045	-R 150	-12.6%
New Packages				
Existing Package	Upgraded Package	Current Line Speed	New Line Speed	
Apollo 10	Apollo 20	10Mbps	20Mbps	
Apollo 20	Apollo 50	20Mbps	50Mbps	

Source: ICASA Database Based on Tariff Notifications

The Apollo 200 FTTH package on Directel on Zoom Fibre can be compared to similar products in the market, for example the Apollo 200/200 Directel on

LinkLayer which costs 28.7% more at R 1 345. Therefore, customers benefit from more competitive prices and upgraded line speeds. The amendment of Directel on Zoom FTTH became effective on 01 July 2021.

2.7.2.42. Directel on LinkLayer

Directel filed an amendment to its FTTH packages on LinkLayer with the Authority on 28 June 2021. The amendments entailed line speed upgrades on certain packages without a price increase.

Table 85 below sets out the line speed upgrades on the Directel on LinkLayer FTTH packages.

Table 85: Directel on LinkLayer FTTH

Existing Package	Upgraded Package	Price
Apollo 10	Apollo 25	R 695
Apollo 20	Apollo 50	R 895

Source: ICASA Database Based on Tariff Notifications

The upgraded Apollo 50 FTTH package on Directel on LinkLayer is comparable to the C-Fibre 50/50Mbps on the Cell C LinkLayer Network which is priced at R 929 or 3.8% higher. The amendment of Directel on LinkLayer FTTH became effective on 01 July 2021.

2.7.3. Promotional FTTH Plans

2.7.3.1. Rain Unlimited Home 5G Basic FTTH

Rain filed its Unlimited home 5G Basic FTTH deal with the Authority on 23 March 2021 wherein it offered an uncapped month-to-month plan with 15Mbps line speed for R 599 per month. Customers who signed up for the plan received a free to use 5G Customer Premise Equipment (CPE) that was locked on the Rain network.

Rain introduced the Rain Unlimited Home 5G Basic FTTH on 01 April 2021 and is expected to be in the market until further notice.

2.7.3.2. SADV Fast Fibre Serengeti FTTH Promotion

On 26 March 2021, SADV filed its SADV Fast Fibre Serengeti FTTH Promotion with the Authority. The Promotion offered SADV customers residing in the Serengeti Golf and Wildlife Estate a choice between a 24-month uncapped fibre subscription (with free voice line) with the first 5 months free as part of the promotion, and a 12-month uncapped fibre contract (with free voice line) with the first 3 months free as part of the promotion.

Table 86 sets out the new product names and prices of the packages on the SADV Fast Fibre Serengeti FTTH Promotion.

Table 86: SADV Fast Fibre Serengeti FTTH Promotion

24-month Contract Uncapped Serengeti monthly subscription (5-month free promo)					
Current Product	New Product	Current Price	New Price	Difference	Variance
access-res-uncapped-ff10	fast fibre Serengeti FTTH promo 24m-10-10	R 599	R 695	R 96	16%
access-res-uncapped-ff20	fast fibre Serengeti FTTH promo 24m-20-20	R 799	R 895	R 96	12%
access-res-uncapped-ff50	fast fibre Serengeti FTTH promo 24m-50-50	R 899	R 1 045	R 146	16.2%
access-res-uncapped-ff100	fast fibre Serengeti FTTH promo 24m-100-100	R 1 199	R 1 275	R 76	6.3%
N/A	fast fibre Serengeti FTTH promo 24m-200-20	N/A	R 1 395	N/A	N/A
access-res-uncapped-ff200	fast fibre Serengeti FTTH promo 24m-200-200	R 1 499	R 1 545	R 46	3.1%
access-res-uncapped-ff1G	fast fibre Serengeti FTTH promo 24m-1000-100	R 3 499	R 1 645	-R 1 854	-53%
12 month Contract Uncapped Serengeti monthly subscription (5 month free promo)					
access-res-uncapped-ff10	fast fibre Serengeti FTTH promo 12m-10-10	R 599	R 695	R 96	16%
access-res-uncapped-ff20	fast fibre Serengeti FTTH promo 12m-20-20	R 799	R 895	R 96	12%
access-res-uncapped-ff50	fast fibre Serengeti FTTH promo 12m-50-50	R 899	R 1 045	R 146	16.2%
access-res-uncapped-ff100	fast fibre Serengeti FTTH promo 12m-100-100	R 1 199	R 1 275	R 76	6.3%
access-res-uncapped-ff200	fast fibre Serengeti FTTH promo 12m-200-200	R 1 499	R 1 545	R 46	3.1%
access-res-uncapped-ff1G	fast fibre Serengeti FTTH promo 12m-1000-100	R 3 499	R 1 645	-R 1 854	-53%

Source: ICASA Database Based on Tariff Notifications

The SADV Fast Fibre Serengeti FTTH Promotion was launched on the market on 27 March 2021 and was made available until further notice.

2.7.3.3. Cipherwave Home-Connect FTTH Packages on Zoom Fibre

Cipherwave Networks filed its Home-Connect FTTH Packages on Zoom Fibre with the Authority on 22 April 2021. The product offered customers a 3 months' free subscription on the Zoom Fibre network when signing up for Home-Connect FTTH packages during the period of the promotion. Customers will be charged standard rates after the 3-month period. Customers benefit through financial relief for a period of 3 months upon signing up for the promotion.

The promotion will be available in the market from 06 May 2021 to 31 October 2021.

2.7.3.4. MTN Double Up Promotion

MTN's Evotel Double Up Promotion was filed with the Authority on 18 May 2021. The promotion entails a 6-month line speed upgrade for customers residing in Witbank, Lenasia, Ennerdale, Rustenburg and Ladysmith. Table 87 below shows the line speed upgrades implemented.

Table 87: MTN Supersonic on Evotel Double Up Promotion

Current Line Speed (Mbps)	Promotional Line Speed (Mbps)
5/1	10/5
10/5	20/10
10/10	20/20
20/5	50/10
20/20	50/50
50/10	100/20
50/50	100/100
100/20	200/50
100/100	200/200

Source: ICASA Database based on Tariff Notifications

The fibre packages realised an increase in both upload and download speeds. For example, the 10Mbps symmetrical line was increased to a 20Mbps symmetrical line. MTN's Evotel Double Up Promotion was filed in terms of the ICT COVID-19 National Disaster Regulations and therefore came to effect on 20 May 2021 and will be in the market until 30 November 2021.

2.7.3.5. MTN Century City Connect Fibre Double Up Promotion

MTN's Century City Connect Double Up Promotion was filed with the Authority on 09 June 2021. The promotion rewards customers on the Century City Connect network with double the fibre line speed at no additional costs. Table 88 below shows the free line speed upgrades.

Table 88: MTN's Century City Double Up Promotion

Previous Line Speed	Previous Price	New Line Speed	New Price
10Mbps	R 499	20Mbps	R 499
20Mbps	R 629	50Mbps	R 629
50Mbps	R 729	100Mbps	R 729

Source: ICASA Database based on Tariff Notifications

It should be noted that the existing customers on the 100Mbps package will remain on their existing speeds and pricing points.

MTN's Century City Connect Double Up Promotion will be available in the market from 01 July 2021 until 01 October 2021.

3. Conclusion

The Authority observed competitiveness between licensees in terms of the number of promotions that were offered in the market, during the period under review, with 24 new promotions launched and 44 extensions filed. The introduction of new, extensions and/or amendments of previous promotions indicate the likelihood of customers' positive reaction towards promotions, and therefore they are used by licensees as a strategic tool to incentivise, reward (loyal customers) and attract new customers.

The Authority has also observed a positive trend in terms of data price reductions with various amendments done by licensees in the past three reporting cycles starting from the 2020/21 FY, i.e., Q2 of 2020/21 FY, Q4 of 2020/21 and current Q2 2021/22 FY. For instance, following Telkom Mobile's revision of its 30-day All-Network Data Portfolio in the preceding reporting period, Vodacom also revised

the data prices in the period under review. For example, Vodacom reduced the price of the 500MB data bundle by R 10 or 12.7% from R 79 (2020/21 FY Q2 Bi-Annual Report) to R 69, while the 1GB data bundle price was reduced by R 14 or 14.1% from R 99 (2020/21 FY Q2 Bi-Annual Report) to R 85. Thus, the continued reduction of data prices makes communication services to be more affordable to customers. MTN and Telkom Mobile also followed suit in terms of reducing some of its 30-day standard prepaid data bundles, albeit outside of the review period, however these positive changes were incorporated to ensure accurate and dated reporting.

The Authority also observed that operators are introducing recurring bundles that are purchased on a once-off basis in the market. For instance, MTN expanded its Everyday Product Suite, by introducing new voice bundles (i.e., Everyday Talk Bundles), revising the existing data offers (i.e., Everyday Gigs Bundles) and introducing additional Everyday Gigs Bundles. On this plan customers opting for the 7-day 1GB are allocated 1GB per day for 7 days at a price of R 99 (previously priced at R 149). Similarly, Vodacom introduced its Everyday-ta Promotional Bundles wherein it offers prepaid and hybrid customers bundles that are paid for upfront and allocated daily, depending on the number of days of allocation. For example, customers opting for the 7-day 1GB are allocated 1GB per day for 7 days at a price of R 99.

The Authority also observed positive changes in the fibre services market from various FNOs, in a form of reduced subscription fees and/or improved line speeds and are seen as beneficial to the public. For example, Vodacom's 20/10Mbps FTTH package on the Openserve network was increased to a 25/25Mbps line speed while the subscription fee was reduced from R 799 to R 599, thus decreasing by R 200 or 25%. A total of 50 notifications regarding fibre services was received from various FNOs in the period under review. The Authority is of the view that the positive amendments which were filed for the fibre services is as a result of the Telkom/Openserve and Competition Commission agreement⁵² (released on 14 April 2020) to substantially reduce excessive pricing attached to wholesale

⁵² Available online at < <http://www.compcom.co.za/wp-content/uploads/2020/04/TELKOM-AND-THE-COMPETITION-COMMISSION-REACH-AGREEMENT-002-002.pdf> > Accessed 22 July 2021

broadband access costs. This resulted in Openserve introducing a new wholesale product suite that would reduce wholesale charges to ISPs. Consequently, the adjustment of the wholesale prices resulted in improved fibre services and/or price reductions at retail level.

MNOs continue to be innovative and offer communication services at more affordable prices that encourage virtual learning and working from home which is one critical measure to aid alleviate economic/financial and social strain brought about by the COVID-19 pandemic. Consequently, in the period under review, MTN introduced its URL-specific Work From Home/Study Bundles and Personalised Work From Home Bundles to facilitate such. The operator also extended its Student Connect Bundles, which offer prepaid students 10GB Anytime, 20GB night-time express, free AYوبا usage (20MB per day) and 100 On-net Minutes, for R 149. Cell C also introduced its University Student Data Bundles wherein it, for example, offers students 20GB for R 200. Also, the Authority continued to receive Wi-Fi/LTE notifications in the period under review, which could be in response to the increase in demand for internet services brought about by the increased number of people working and/or studying from home.

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

4. References

End User and Subscriber Service Charter Amendment Regulations. (2018). *Government Gazette No. 41613*), Available online:

<<https://www.icasa.org.za/uploads/files/EUSSC-Regulations-2018.pdf>>

[Accessed on 21 September 2018]

End User and Subscriber Service Charter Amendment Regulations. (2019). *Government Gazette No. 42225*), Available online:

<<https://www.icasa.org.za/news/2019/amendments-to-the-end-user-and-subscriber-service-charter-regulations>> [Accessed on 22 February 2019]

Manx Telecom. (2017), Available online:

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

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

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

Annexure A: List of Other⁵³ Tariff Notifications Filed During the Period Under Review

TARIFF PLAN	EXPLANATION OF THE TARIFF PLAN	RELEVANT DATES	PRICING/PRODUCT/PACKAGE INFORMATION	STATUS
Cell C Data Win Back Promotion	Cell C's Data Win Back Promotion is such that Cell C rewards its selected customers with either free 10 voice minutes, 5 voice minutes, or a 20MB data bundle after the specified airtime recharges.	<p>Filed: 14 May 2020</p> <p>Launch Date: 15 May 2020</p> <p>Extension Date: 19 January 2021, 22 July 2021</p> <p>Decommission Date: 31 July 2021(initial), 31 October 2021(extended)</p>	<p>Cell C's Data Win Back Promotion was analysed in the 2020/21 FY Q4 Bi-Annual Tariff Analysis Report which can be found on the Authority's website on the link below:</p> <p><https://www.icasa.org.za/legislation-and-regulations/bi-annual-tariffs-analysis-report-01-jul-to-31-dec-2020></p>	<p>Ongoing as at 30 June 2021. Initially it was expected to be decommissioned on 31 July 2021, however Cell C filed an extension on 22 July 2021, extending the promotion to 31 October 2021.</p>

⁵³ Other tariff notifications filed or received during the period under review that were in existence as at end of 30 June 2021 which were not discussed/mentioned in the main part of this report

Cell C Recharge Drop Promotion	The promotional offer is such that Cell C rewards its selected customers with either free data or a voice bundle after the specified airtime recharges.	<p>Filed: 12 May 2020</p> <p>Launch Date: 14 May 2020</p> <p>Extension Date: 19 January 2021, 22 July 2021</p> <p>Decommission Date: 31 July 2021(initial), 31 October 2021(extended)</p>	<p>Cell C's Recharge Drop Promotion was analysed in the 2020/21 FY Q2 B-Annual Tariff Analysis Report which can be found on the Authority's website on the link below:</p> <p>< https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020 ></p>	<p>Ongoing as at 30 June 2021.</p> <p>Initially it was expected to be decommissioned on 31 July, however Cell C filed an extension on 22 July 2021, extending the promotion to 31 October 2021.</p>								
Cell C 50GB for 6 Months Black Friday Promotion	Cell C is offering selected prepaid, post-paid and top-up customers 50GB + 50GB Nite Data valid for 6 months (180 days) for a monetary value of R 500.	<p>Filed: 23 November 2020</p> <p>Launch Date: 27 November 2020</p>	<p>Table 89:Cell C 50GB for 6 Months Black Friday Promotional Bundle</p> <table><tr><th>Anytime allocation</th><th>Data Free Nite Allocation</th><th>Data Validity</th><th>Price</th></tr><tr><td>50GB</td><td>50GB</td><td>180 days</td><td>R 500</td></tr></table> <p>Source: ICASA database based on Tariff Notifications</p>	Anytime allocation	Data Free Nite Allocation	Data Validity	Price	50GB	50GB	180 days	R 500	<p>Ongoing as at 30 June 2021 and was expected to be decommissioned on 30 June 2021. However, Cell C filed extensions on 21 January 2021, 17 March 2021 and</p>
Anytime allocation	Data Free Nite Allocation	Data Validity	Price									
50GB	50GB	180 days	R 500									

		<p>Extension Date: 21 January 2021, 17 March 2021, 21 June 2021</p> <p>Decommission Date: 31 January 2021(initial), 30 September 2021(extended)</p>		21 June 2021, extending the promotion to 30 September 2021.
Vodacom Fibre Broadband Promotions	The promotion offered free service activation for fibre plans.	<p>Filed: 23 June 2017, 12 October 2017, 12 February 2018, 25 July 2018, 22 October 2018, 22 January 2019</p> <p>Extension Dates: 19</p>	<p>Vodacom offered zero-rated activation fees for the following fibre plans:</p> <ul style="list-style-type: none"> • Self-built - 30 July 2021 • CDP Rentals - 30 July 2021 • Edge 1 – 4 Evotel - 30 July 2021 • Bitstream Speed Promotion – Indefinite • LTE Interim - 30 July 2021 	Ongoing as at 30 June 2021, however was decommissioned on 30 July 2021.

		<p>March 2019, 19 July 2019, 26 June 2020, 27 January 2021</p> <p>Amendment Date: 09 September 2019</p> <p>Decommission Date: 30 July 2021</p>														
Vodacom Fibre Broadband Promotions	The operator offered a range of promotions from its self-built network fibre to bitstream network fibre.	<p>Filed: 20 September 2018</p> <p>Launch Date: 04 October 2018</p> <p>Extension Date(s): 19 March 2019, 19 July 2019,</p>	<p><i>Table 90: Vodacom Fibre Broadband Promotions</i></p> <table><tr><th>Fibre Network Operator (FNO)</th><th>Line Speed (Mbps)</th><th>Monthly Data Allocation</th><th>Current Subscription Fee</th></tr><tr><td colspan="4">R 405 Fibre Promotion</td></tr><tr><td>Vodacom</td><td>10/5</td><td>50GB</td><td>R 405</td></tr></table> <p><i>Source: ICASA Database based on Tariff Notifications</i></p>	Fibre Network Operator (FNO)	Line Speed (Mbps)	Monthly Data Allocation	Current Subscription Fee	R 405 Fibre Promotion				Vodacom	10/5	50GB	R 405	Ongoing as at 30 June 2021, however, was decommissioned on 30 July 2021.
Fibre Network Operator (FNO)	Line Speed (Mbps)	Monthly Data Allocation	Current Subscription Fee													
R 405 Fibre Promotion																
Vodacom	10/5	50GB	R 405													

		26 June 2020, 27 January 2021 Decommission Date: 30 July 2021																
Telkom Smartbroad band Wireless Uncapped Business Hours (SIM only) Promotion	Telkom's Smartbroadband Wireless Uncapped Business Hours (SIM only) Promotion offered prospective customers unlimited access to the internet between 12am and 5pm.	Filed: 04 February 2021 Launch Date: 07 February 2021 Decommission Date: 31 July 2021	<i>Table 91: Telkom Smartbroadband Wireless Uncapped Business Hours (SIM only) Promotion</i> <table><tr><th>Description</th><th>Validi ty</th><th>Data</th><th>Voice</th><th>Stand ard Price</th><th>Promot ion Price</th></tr><tr><td rowspan="3">SmartBroadband Wireless Uncapped</td><td rowspan="3">12 am - 5pm</td><td>150 GB @ 10Mbps</td><td rowspan="3">300 on- net minutes</td><td rowspan="3">R 549</td><td rowspan="3">R 399</td></tr><tr><td>then 50 GB @ 4Mbps</td></tr><tr><td>then 2Mbs uncapped</td></tr></table> <i>Source: ICASA Database based on Tariff Notifications</i>	Description	Validi ty	Data	Voice	Stand ard Price	Promot ion Price	SmartBroadband Wireless Uncapped	12 am - 5pm	150 GB @ 10Mbps	300 on- net minutes	R 549	R 399	then 50 GB @ 4Mbps	then 2Mbs uncapped	Ongoing as at 30 June 2021, however it was decommissioned on 31 July 2021.
Description	Validi ty	Data	Voice	Stand ard Price	Promot ion Price													
SmartBroadband Wireless Uncapped	12 am - 5pm	150 GB @ 10Mbps	300 on- net minutes	R 549	R 399													
		then 50 GB @ 4Mbps																
		then 2Mbs uncapped																
Cell C 7-Day WhatsApp Boost Bundle Promotion	The Cell C WhatsApp Boost Bundle Promotion was made available to customers who purchase base (standard) daily, 7- day or monthly data bundles.	Filed: 21 July 2020 Launch Date: 31 July 2020 Extension Date: 23 February	Cell C's WhatsApp Boost Bundle Promotion was analysed in the 2020/21 FY Q4 Bi-Annual Tariff Analysis Report which can be found on the Authority's website on the link below: < https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jul-30-dec-2020 >	Ongoing as at 30 June 2021 and was expected to be decommissioned on 30 June 2021. However, Cell C filed another extension on 21 June 2021,														

		2021(initial), 21 June 2021(extended)		extending the promotion to 30 September 2021.
		Decommission Date: 30 June 2021(initial), 30 September 2021(extended)		
Cell C WhatsApp Boost Promotion	The Cell C WhatsApp Boost Promotion was available to customers who purchase base (standard) daily, 5- day or monthly data bundles.	Filed: 07 November 2019 Launch Date: 19 November 2019 Extension Date: 23 February 2021, 21 June 2021	Cell C's WhatsApp Boost Promotion was analysed in the 2020/21 FY Q4 Bi-Annual Tariff Analysis Report which can be found on the Authority's website on the link below: < https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jul-30-dec-2020 >	Ongoing as at 30 June 2021 and was expected to be decommissioned on 30 June 2021. However, Cell C filed another extension on 21 June 2021, extending the promotion to 30 September 2021.

		Decommission Date: 30 September 2021																														
Cell C All-in-One Double data Promotion	The promotion is available to prepaid and top-up customers, rewarding customers with double the data upon purchasing the All-in-One 30MB, 120MB, 300MB, 5GB, 10GB and/or 20GB packages.	Filed: 07 February 2020 Launch Date: 19 February 2020 Amendment: 25 February 2021 Extension Date: 21 June 2021 Decommission Date: 30 June 2021(initial); 30 September 2021(extended)	Cell C's All-in-One Double Data Bundle Promotion was analysed in the 2020/21 FY Q2 Bi-Annual Tariff Analysis Report which can be found on the Authority's website on the link below: https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020 <i>Table 92: Additional Cell C All-in-One Double Data Bundles</i> <table><tr><th>All-In-One Bundle</th><th>Inclusive Data</th><th>Free Bonus Data</th><th>Any-net minutes</th><th>On-net minutes</th><th>Validity</th><th>Social Data</th></tr><tr><td>All-In-One 5GB</td><td>5GB</td><td>5GB</td><td>90</td><td>1000</td><td>30-days</td><td>500MB</td></tr><tr><td>All-In-One 10GB</td><td>10GB</td><td>10GB</td><td>120</td><td>1000</td><td>30-days</td><td>1GB</td></tr><tr><td>All-In-One 20GB</td><td>20GB</td><td>20GB</td><td>350</td><td>1000</td><td>30-days</td><td>2GB</td></tr></table> <i>Source: ICASA Database Based on Tariff Notifications</i>	All-In-One Bundle	Inclusive Data	Free Bonus Data	Any-net minutes	On-net minutes	Validity	Social Data	All-In-One 5GB	5GB	5GB	90	1000	30-days	500MB	All-In-One 10GB	10GB	10GB	120	1000	30-days	1GB	All-In-One 20GB	20GB	20GB	350	1000	30-days	2GB	Ongoing as at 30 June 2021 and was expected to be decommissioned on 30 June 2021. However, Cell C filed another extension on 21 June 2021, extending the promotion to 30 September 2021. period.
All-In-One Bundle	Inclusive Data	Free Bonus Data	Any-net minutes	On-net minutes	Validity	Social Data																										
All-In-One 5GB	5GB	5GB	90	1000	30-days	500MB																										
All-In-One 10GB	10GB	10GB	120	1000	30-days	1GB																										
All-In-One 20GB	20GB	20GB	350	1000	30-days	2GB																										

Cell C 100GB and 200GB for 6 Months Promotion	The Cell C 100GB and 200GB for 6 Months Promotion allocated prepaid, post-paid and top-up customers additional nite data over and above the 100GB or 200GB anytime data purchased.	<p>Filed: 04 March 2021</p> <p>Launch Date: 05 March 2021</p> <p>Extension Date(s): 21 June 2021</p> <p>Decommission Date: 30 June 2021 (Initial); 30 September 2021 (extended)</p>	<p>Table 93:Cell C 100GB and 200GB for 6 Months Promotion</p> <table><thead><tr><th>Anytime Data</th><th>Nite Data Allocation</th><th>Price</th><th>Validity</th></tr></thead><tbody><tr><td>100GB</td><td>100GB</td><td>R 800</td><td>180 Days</td></tr><tr><td>200GB</td><td>100GB</td><td>R 1 699</td><td>180 Days</td></tr></tbody></table> <p>Source: ICASA Database Based on Tariff Notifications</p>	Anytime Data	Nite Data Allocation	Price	Validity	100GB	100GB	R 800	180 Days	200GB	100GB	R 1 699	180 Days	Ongoing as at 30 June 2021 and was expected to be decommissioned on 30 June 2021. However, Cell C filed another extension on 21 June 2021, extending the promotion to 30 September 2021.
Anytime Data	Nite Data Allocation	Price	Validity													
100GB	100GB	R 800	180 Days													
200GB	100GB	R 1 699	180 Days													
Cell C Recharge and Get Promotion	The Cell C Recharge and Get Promotion rewarded selected Cell C subscribers with free data bundles with every qualifying recharge.	<p>Filed: 24 March 2020</p> <p>Launch Date: 03 April 2020</p> <p>Amendment: 16 March 2021, 27 May</p>	<p>Cell C’s Recharge Drop Promotion was analysed in the 2020/21 FY Q4 Bi-Annual Tariff Analysis Report which can be found on the Authority’s website on the link below:</p> <p><https://www.icasa.org.za/legislation-and-regulations/bi-annual-tariffs-analysis-report-01-jul-to-31-dec-2020></p>	Ongoing as at 30 June 2021.	Initially it was expected to be decommissioned on 31 January 2021, however this											

		2021, 09 June 2021 Extension Date(s): 19 January 2021 Decommission Date: 28 February 2021 (Initial); 30 June 2021 (extended)	<div>Table 94: Cell C Recharge and Get Promotion additional Tiers</div> <table><thead><tr><th>Recharge amount required for reward allocation</th><th>Data</th><th>Validity</th></tr></thead><tbody><tr><td>R10</td><td>60MB</td><td>2 Days</td></tr><tr><td>R35</td><td>500MB</td><td>2 Days</td></tr></tbody></table> <div>Source: ICASA Database based on Tariff Notifications</div>	Recharge amount required for reward allocation	Data	Validity	R10	60MB	2 Days	R35	500MB	2 Days	was extended to 31 July 2021.									
Recharge amount required for reward allocation	Data	Validity																				
R10	60MB	2 Days																				
R35	500MB	2 Days																				
Vodacom 30 Day Recurring Data Bundles	Vodacom 30 Day Recurring Promotional Bundles rewarded customers with additional data upon purchasing selected Vodacom 30-day data bundles.	Filed: 23 June 2020 Launch Date: 24 June 2020 Extension Date(s): 16 September 2020, 19 March 2021	<div>Table 95: Vodacom 30 Day Recurring Promotional Bundles</div> <table><thead><tr><th>Bundle Sizes</th><th>Price (Incl. VAT)</th></tr></thead><tbody><tr><td>150MB + 30MB</td><td>R 29</td></tr><tr><td>325MB + 65MB</td><td>R 55</td></tr><tr><td>500MB + 100MB</td><td>R 79</td></tr><tr><td>1GB + 200MB</td><td>R 99</td></tr><tr><td>3GB + 600MB</td><td>R 229</td></tr><tr><td>5GB + 1GB</td><td>R 349</td></tr><tr><td>10GB + 2GB</td><td>R 469</td></tr><tr><td>20GB + 4GB</td><td>R 699</td></tr></tbody></table> <div>Source: ICASA database based on Tariff Notifications</div>	Bundle Sizes	Price (Incl. VAT)	150MB + 30MB	R 29	325MB + 65MB	R 55	500MB + 100MB	R 79	1GB + 200MB	R 99	3GB + 600MB	R 229	5GB + 1GB	R 349	10GB + 2GB	R 469	20GB + 4GB	R 699	Ongoing as at 30 June 2021, however it will be decommissioned on 26 September 2021.
Bundle Sizes	Price (Incl. VAT)																					
150MB + 30MB	R 29																					
325MB + 65MB	R 55																					
500MB + 100MB	R 79																					
1GB + 200MB	R 99																					
3GB + 600MB	R 229																					
5GB + 1GB	R 349																					
10GB + 2GB	R 469																					
20GB + 4GB	R 699																					

		Decommission Date: 26 September 2021																																																																				
Vodacom 30-Day Prepaid Recurring Promotional Bundles	Offered its 30-Day recurring data bundles (filed with the Authority on 16 April 2021) at discounted prices. The discounts range from 13.8% to 37.5%.	Filed: 19 April 2021 Launch Date: 20 April 2021 Decommission Date: 31 August 2021	<p><i>Table 96: Vodacom 30-Day Prepaid Recurring Promotional Bundles</i></p> <table><tr><th>Description</th><th>Bundle Allocation (MB)</th><th>Retail Price (Incl. VAT)</th><th>Promotional Price (Incl. VAT)</th><th>Price Difference</th><th>Variance (%)</th></tr><tr><td>240MB every month at R29</td><td>240</td><td>R 29</td><td>R 25</td><td>-R 4</td><td>-13.8%</td></tr><tr><td>420MB every month at R49</td><td>420</td><td>R 49</td><td>R 39</td><td>-R 10</td><td>-20.4%</td></tr><tr><td>600MB every month at R69</td><td>600</td><td>R 69</td><td>R 55</td><td>-R 14</td><td>-20.3%</td></tr><tr><td>1.2GB every month at R85</td><td>1229</td><td>R 85</td><td>R 69</td><td>-R 16</td><td>-18.8%</td></tr><tr><td>3.6GB every month at R229</td><td>3686</td><td>R 229</td><td>R 179</td><td>-R 50</td><td>-21.8%</td></tr><tr><td>6GB every month at R349</td><td>6144</td><td>R 349</td><td>R 279</td><td>-R 70</td><td>-20.1%</td></tr><tr><td>12GB every month at R469</td><td>12288</td><td>R 469</td><td>R 349</td><td>-R 120</td><td>-25.6%</td></tr><tr><td>24GB every month at R699</td><td>24576</td><td>R 699</td><td>R 499</td><td>-R 200</td><td>-28.6%</td></tr><tr><td>50GB every month at R1499</td><td>51200</td><td>R 1 499</td><td>R 999</td><td>-R 500</td><td>-33.4%</td></tr><tr><td>100GB every month at R2399</td><td>102400</td><td>R 2 399</td><td>R 1 499</td><td>-R 900</td><td>-37.5%</td></tr></table> <p><i>Source: ICASA database based on Tariff Notifications</i></p>	Description	Bundle Allocation (MB)	Retail Price (Incl. VAT)	Promotional Price (Incl. VAT)	Price Difference	Variance (%)	240MB every month at R29	240	R 29	R 25	-R 4	-13.8%	420MB every month at R49	420	R 49	R 39	-R 10	-20.4%	600MB every month at R69	600	R 69	R 55	-R 14	-20.3%	1.2GB every month at R85	1229	R 85	R 69	-R 16	-18.8%	3.6GB every month at R229	3686	R 229	R 179	-R 50	-21.8%	6GB every month at R349	6144	R 349	R 279	-R 70	-20.1%	12GB every month at R469	12288	R 469	R 349	-R 120	-25.6%	24GB every month at R699	24576	R 699	R 499	-R 200	-28.6%	50GB every month at R1499	51200	R 1 499	R 999	-R 500	-33.4%	100GB every month at R2399	102400	R 2 399	R 1 499	-R 900	-37.5%	Ongoing as at 30 June 2021, however, was decommissioned on 31 August 2021.
Description	Bundle Allocation (MB)	Retail Price (Incl. VAT)	Promotional Price (Incl. VAT)	Price Difference	Variance (%)																																																																	
240MB every month at R29	240	R 29	R 25	-R 4	-13.8%																																																																	
420MB every month at R49	420	R 49	R 39	-R 10	-20.4%																																																																	
600MB every month at R69	600	R 69	R 55	-R 14	-20.3%																																																																	
1.2GB every month at R85	1229	R 85	R 69	-R 16	-18.8%																																																																	
3.6GB every month at R229	3686	R 229	R 179	-R 50	-21.8%																																																																	
6GB every month at R349	6144	R 349	R 279	-R 70	-20.1%																																																																	
12GB every month at R469	12288	R 469	R 349	-R 120	-25.6%																																																																	
24GB every month at R699	24576	R 699	R 499	-R 200	-28.6%																																																																	
50GB every month at R1499	51200	R 1 499	R 999	-R 500	-33.4%																																																																	
100GB every month at R2399	102400	R 2 399	R 1 499	-R 900	-37.5%																																																																	
Cell C Socializa	The Cell C Socializa Bundles Promotion offered customers	Filed: 11 November 2020	Cell C's Socializa Bundles Promotion was analysed in the 2020/21 FY Q4 Bi-Annual Tariff Analysis Report which can be found on the Authority's website on the link below:	Ongoing as at 30 June 2021 and was expected to be																																																																		

Bundles Promotion	data that could be used exclusively to access specific social media and/or streaming media platforms.	Launch Date: 13 November 2020 Amendment: 06 May 2021 Extension Date: 28 April 2021, 21 July 2021 Decommission Date: 31 April 2021(initial), 31 July 2021, 30 September 2021(extended)	< https://www.icasa.org.za/legislation-and-regulations/bi-annual-tariffs-analysis-report-01-jul-to-31-dec-2020 >	decommissioned on 31 April 2021. However, Cell C filed extensions on 28 April 2021 and 21 July 2021, extending the promotion to 30 September 2021.														
MTN Y'ello Bucks Promotion	MTN's Y'elloBucks Promotion saw prepaid and post-paid customers who are on, or registered, on the MyMTN	Filed: 30 April 2021 Launch Date: 04 May 2021	<table><tr><th colspan="3">Table 97: MTN Personalised Monthly Data (Sample)</th></tr><tr><th>Personalised Bundle Name</th><th>Previous Price</th><th>New Price (Incl. VAT)</th></tr><tr><td rowspan="2">40MB</td><td>R 5</td><td rowspan="2">R 10</td></tr><tr><td>R 10</td></tr><tr><td rowspan="2">100MB</td><td>R 12</td><td rowspan="2">R 20</td></tr><tr><td>R 15</td></tr></table>	Table 97: MTN Personalised Monthly Data (Sample)			Personalised Bundle Name	Previous Price	New Price (Incl. VAT)	40MB	R 5	R 10	R 10	100MB	R 12	R 20	R 15	Ongoing as at 30 June 2021, however, was decommissioned on 31 August 2021.
Table 97: MTN Personalised Monthly Data (Sample)																		
Personalised Bundle Name	Previous Price	New Price (Incl. VAT)																
40MB	R 5	R 10																
	R 10																	
100MB	R 12	R 20																
	R 15																	

	Y’elloBucks rewards programme earning Y’elloBucks which could be used to unlock certain benefits including entries to competitions.	Decommission Date: 31 August 2021	<table><tr><td rowspan="4">200MB</td><td colspan="2">R 25</td><td rowspan="4">R 29</td></tr><tr><td colspan="2">R 29</td></tr><tr><td colspan="2">R 35</td></tr><tr><td colspan="2">R 39</td></tr><tr><td rowspan="3">350MB</td><td colspan="2">R 39</td><td rowspan="3">R 49</td></tr><tr><td colspan="2">R 55</td></tr><tr><td colspan="2">R 60</td></tr><tr><td rowspan="2">500MB</td><td colspan="2">R 60</td><td rowspan="2">R 69</td></tr><tr><td colspan="2">R 75</td></tr><tr><td>1GB</td><td colspan="2">R 89</td><td>R 85</td></tr><tr><td>1.5GB</td><td colspan="2">R 149</td><td>R 99</td></tr><tr><td rowspan="2">2GB</td><td colspan="2">R 149</td><td rowspan="2">R 149</td></tr><tr><td colspan="2">R 169</td></tr></table>				200MB	R 25		R 29	R 29		R 35		R 39		350MB	R 39		R 49	R 55		R 60		500MB	R 60		R 69	R 75		1GB	R 89		R 85	1.5GB	R 149		R 99	2GB	R 149		R 149	R 169																																
			200MB	R 25		R 29																																																																					
				R 29																																																																							
				R 35																																																																							
				R 39																																																																							
			350MB	R 39		R 49																																																																					
				R 55																																																																							
				R 60																																																																							
			500MB	R 60		R 69																																																																					
				R 75																																																																							
1GB	R 89		R 85																																																																								
1.5GB	R 149		R 99																																																																								
2GB	R 149		R 149																																																																								
	R 169																																																																										
Source: ICASA database based on Tariff Notifications																																																																											
VodaBucks Store Data Bundle Offers	VodaBucks Store Data Bundle offers prepaid, hybrid and post-paid customers data bundles that can be purchased using cash, Vodabucks, or a combination of both.	Filed: 20 May 2021 Launch Date: 21 May 2021	<div>Table 98:VodaBucks Store Data Bundle Offers (Sample)</div> <table><tr><th>Bundle Description</th><th>Extra offer</th><th>Validity</th><th>Price (Incl. VAT)</th></tr><tr><td>50MB</td><td></td><td>7 days</td><td>R8 + VodaBucks</td></tr><tr><td>75MB + 25MB Free</td><td>25MB Free</td><td>7 days</td><td>R9 + VodaBucks</td></tr><tr><td>100MB</td><td></td><td>7 days</td><td>R10 + VodaBucks</td></tr><tr><td>200MB + 50MB Free</td><td>50MB Free</td><td>7 days</td><td>R12 + VodaBucks</td></tr><tr><td>250MB</td><td></td><td>7 days</td><td>R15 + VodaBucks</td></tr><tr><td>300MB + 200MB Free</td><td>200MB Free</td><td>7 days</td><td>R20 + VodaBucks</td></tr><tr><td>500MB</td><td></td><td>7 days</td><td>R25 + VodaBucks</td></tr><tr><td>750MB + 250MB Free</td><td>250 Free</td><td>7 days</td><td>R35 + VodaBucks</td></tr><tr><td>1GB</td><td></td><td>7 days</td><td>R45 + VodaBucks</td></tr><tr><td>750MB + 250MB Free</td><td>250MB Free</td><td>30 days</td><td>R45 + VodaBucks</td></tr><tr><td>1GB</td><td></td><td>30 days</td><td>R55 + VodaBucks</td></tr><tr><td>1.5GB + 500MB Free</td><td>500MB Free</td><td>30 days</td><td>R85 + VodaBucks</td></tr><tr><td>2.5GB + 500MB Free</td><td>500MB Free</td><td>30 days</td><td>R129 + VodaBucks</td></tr><tr><td>2GB</td><td></td><td>30 days</td><td>R99 + VodaBucks</td></tr><tr><td>Facebook 500MB data</td><td></td><td>1 day</td><td>R0 + VodaBucks</td></tr><tr><td>500MB Instagram data</td><td></td><td>1 day</td><td>R0 + VodaBucks</td></tr></table>				Bundle Description	Extra offer	Validity	Price (Incl. VAT)	50MB		7 days	R8 + VodaBucks	75MB + 25MB Free	25MB Free	7 days	R9 + VodaBucks	100MB		7 days	R10 + VodaBucks	200MB + 50MB Free	50MB Free	7 days	R12 + VodaBucks	250MB		7 days	R15 + VodaBucks	300MB + 200MB Free	200MB Free	7 days	R20 + VodaBucks	500MB		7 days	R25 + VodaBucks	750MB + 250MB Free	250 Free	7 days	R35 + VodaBucks	1GB		7 days	R45 + VodaBucks	750MB + 250MB Free	250MB Free	30 days	R45 + VodaBucks	1GB		30 days	R55 + VodaBucks	1.5GB + 500MB Free	500MB Free	30 days	R85 + VodaBucks	2.5GB + 500MB Free	500MB Free	30 days	R129 + VodaBucks	2GB		30 days	R99 + VodaBucks	Facebook 500MB data		1 day	R0 + VodaBucks	500MB Instagram data		1 day	R0 + VodaBucks	Ongoing as at 30 June 2021.
Bundle Description	Extra offer	Validity	Price (Incl. VAT)																																																																								
50MB		7 days	R8 + VodaBucks																																																																								
75MB + 25MB Free	25MB Free	7 days	R9 + VodaBucks																																																																								
100MB		7 days	R10 + VodaBucks																																																																								
200MB + 50MB Free	50MB Free	7 days	R12 + VodaBucks																																																																								
250MB		7 days	R15 + VodaBucks																																																																								
300MB + 200MB Free	200MB Free	7 days	R20 + VodaBucks																																																																								
500MB		7 days	R25 + VodaBucks																																																																								
750MB + 250MB Free	250 Free	7 days	R35 + VodaBucks																																																																								
1GB		7 days	R45 + VodaBucks																																																																								
750MB + 250MB Free	250MB Free	30 days	R45 + VodaBucks																																																																								
1GB		30 days	R55 + VodaBucks																																																																								
1.5GB + 500MB Free	500MB Free	30 days	R85 + VodaBucks																																																																								
2.5GB + 500MB Free	500MB Free	30 days	R129 + VodaBucks																																																																								
2GB		30 days	R99 + VodaBucks																																																																								
Facebook 500MB data		1 day	R0 + VodaBucks																																																																								
500MB Instagram data		1 day	R0 + VodaBucks																																																																								

			<table><tr><td>500MB Pinterest data</td><td></td><td>1 day</td><td>R0 + VodaBucks</td></tr><tr><td>YouTube 250MB data</td><td></td><td>1 day</td><td>R0 + VodaBucks</td></tr><tr><td>30MB for the next 60 mins</td><td></td><td>60 mins</td><td>R0 + VodaBucks</td></tr><tr><td>100MB for the next 60 mins</td><td></td><td>60 mins</td><td>R0 + VodaBucks</td></tr><tr><td>200MB for the next 60 mins</td><td></td><td>60 mins</td><td>R0 + VodaBucks</td></tr><tr><td>500MB WhatsApp data</td><td></td><td>1 day</td><td>R0 + VodaBucks</td></tr><tr><td>750MB + 250MB Free</td><td>250MB Free</td><td>7 days</td><td>R20 + VodaBucks</td></tr><tr><td>1GB + 4GB Free</td><td>4GB Free</td><td>7 days</td><td>R55 + VodaBucks</td></tr></table> <p>Source: ICASA database based on Tariff Notifications</p> <p>More information regarding the VodaBucks Store Data Bundle Offers is available on Vodacom’s website: https://www.vodacom.co.za/vodacom/terms/rewards/vodabucks-store</p>	500MB Pinterest data		1 day	R0 + VodaBucks	YouTube 250MB data		1 day	R0 + VodaBucks	30MB for the next 60 mins		60 mins	R0 + VodaBucks	100MB for the next 60 mins		60 mins	R0 + VodaBucks	200MB for the next 60 mins		60 mins	R0 + VodaBucks	500MB WhatsApp data		1 day	R0 + VodaBucks	750MB + 250MB Free	250MB Free	7 days	R20 + VodaBucks	1GB + 4GB Free	4GB Free	7 days	R55 + VodaBucks	
500MB Pinterest data		1 day	R0 + VodaBucks																																	
YouTube 250MB data		1 day	R0 + VodaBucks																																	
30MB for the next 60 mins		60 mins	R0 + VodaBucks																																	
100MB for the next 60 mins		60 mins	R0 + VodaBucks																																	
200MB for the next 60 mins		60 mins	R0 + VodaBucks																																	
500MB WhatsApp data		1 day	R0 + VodaBucks																																	
750MB + 250MB Free	250MB Free	7 days	R20 + VodaBucks																																	
1GB + 4GB Free	4GB Free	7 days	R55 + VodaBucks																																	
Rain Unlimited Home 5G Standard Promotion	Rain’s Unlimited Home 5G Standard Promotion offers customers an unlimited month-to-month home Wi-Fi plan with up to 30Mbps line speed for R 479 per month, which is less than the previous price of R 699.	Filed: 26 May 2021 Launch Date: 03 June 2021 Decommission Date: 02 September 2021	<p>Table 99:Rain Unlimited Home 5G Standard Promotion</p> <table><tr><th>Descripti on</th><th>Previous Price</th><th>Current Price</th><th>Differenc e</th><th>Variance (%)</th></tr><tr><td>30Mbps</td><td>R 699</td><td>R 479</td><td>R 220</td><td>-31.5%</td></tr></table>	Descripti on	Previous Price	Current Price	Differenc e	Variance (%)	30Mbps	R 699	R 479	R 220	-31.5%	Ongoing as at 30 June 2021. It is to be decommissioned on 02 September 2021.																						
Descripti on	Previous Price	Current Price	Differenc e	Variance (%)																																
30Mbps	R 699	R 479	R 220	-31.5%																																

Rain Unlimited Home 5G Premium Promotion	Rain’s Unlimited Home 5G Premium Promotion offers customers an unlimited month-to-month home Wi-Fi plan with 5G download speeds for R 699 per month, which is less than the previous price of R 999.	Filed: 26 May 2021 Launch Date: 03 June 2021 Decommission Date: 02 September 2021	<p>Table 100:Rain Unlimited Home 5G Premium Promotion</p> <table><thead><tr><th>Descriptio n</th><th>Previous Price</th><th>Current Price</th><th>Difference</th><th>Variance (%)</th></tr></thead><tbody><tr><td>5G Download</td><td>R 999</td><td>R 699</td><td>R 300</td><td>-30%</td></tr></tbody></table> <p>Source: ICASA Database Based on Tariff Notifications</p>	Descriptio n	Previous Price	Current Price	Difference	Variance (%)	5G Download	R 999	R 699	R 300	-30%	Ongoing as at 30 June 2021. It is to be decommissioned on 02 September 2021.																																																																																																				
Descriptio n	Previous Price	Current Price	Difference	Variance (%)																																																																																																														
5G Download	R 999	R 699	R 300	-30%																																																																																																														
Vodacom Everyday-ta Promotion	Vodacom’s Everyday-ta Promotion offered prepaid and hybrid customers data and/or voice bundles that are paid for upfront and allocated daily, depending on the number of days of allocation.	Filed: 01 June 2021 Launch Date: 15 June 2021 Amendment Date: 05 July 2021 Extension Date: 05 July 2021	<p>Table 101:Vodacom Everyday-ta Promotional Bundles</p> <table><thead><tr><th colspan="8">Data Offers - SPDRs</th></tr><tr><th rowspan="2">Daily Size</th><th colspan="7">Price</th></tr><tr><th>3 days</th><th>5 days</th><th>7 days</th><th>10 days</th><th>14 days</th><th>21 days</th><th>30 days</th></tr></thead><tbody><tr><td>50MB</td><td>R 17</td><td>N/A</td><td>R 29</td><td>N/A</td><td>N/A</td><td>N/A</td><td>R 49</td></tr><tr><td>100MB</td><td>R 25</td><td>N/A</td><td>R 45</td><td>N/A</td><td>N/A</td><td>N/A</td><td>R 79</td></tr><tr><td>250MB</td><td>R 29</td><td>R 29</td><td>R 49</td><td>R 45</td><td>R 59</td><td>R 75</td><td>R 99</td></tr><tr><td>500MB</td><td>R 49</td><td>R 45</td><td>R 79</td><td>R 69</td><td>R 89</td><td>R 115</td><td>R 159</td></tr><tr><td>1GB</td><td>R 69</td><td>R 89</td><td>R 99</td><td>R 139</td><td>R 175</td><td>R 229</td><td>R 299</td></tr><tr><td>2GB</td><td>R 99</td><td>R 145</td><td>R 179</td><td>R 235</td><td>R 295</td><td>R 389</td><td>R 499</td></tr><tr><td>3GB</td><td>N/A</td><td>N/A</td><td>N/A</td><td>N/A</td><td>N/A</td><td>N/A</td><td>R 699</td></tr><tr><td>5GB</td><td>N/A</td><td>N/A</td><td>N/A</td><td>N/A</td><td>N/A</td><td>N/A</td><td>R 999</td></tr><tr><th colspan="8">Voice offers - SPVR's</th></tr><tr><th rowspan="2">Daily Size</th><th colspan="7">Price</th></tr><tr><th>3 days*</th><th>5 days*</th><th>7 days*</th><th>10 days</th><th>14 days</th><th>21 days</th><th>30 days</th></tr></tbody></table>	Data Offers - SPDRs								Daily Size	Price							3 days	5 days	7 days	10 days	14 days	21 days	30 days	50MB	R 17	N/A	R 29	N/A	N/A	N/A	R 49	100MB	R 25	N/A	R 45	N/A	N/A	N/A	R 79	250MB	R 29	R 29	R 49	R 45	R 59	R 75	R 99	500MB	R 49	R 45	R 79	R 69	R 89	R 115	R 159	1GB	R 69	R 89	R 99	R 139	R 175	R 229	R 299	2GB	R 99	R 145	R 179	R 235	R 295	R 389	R 499	3GB	N/A	N/A	N/A	N/A	N/A	N/A	R 699	5GB	N/A	N/A	N/A	N/A	N/A	N/A	R 999	Voice offers - SPVR's								Daily Size	Price							3 days*	5 days*	7 days*	10 days	14 days	21 days	30 days	Ongoing as at 30 June 2021, however, was decommissioned on 15 September 2021.
Data Offers - SPDRs																																																																																																																		
Daily Size	Price																																																																																																																	
	3 days	5 days	7 days	10 days	14 days	21 days	30 days																																																																																																											
50MB	R 17	N/A	R 29	N/A	N/A	N/A	R 49																																																																																																											
100MB	R 25	N/A	R 45	N/A	N/A	N/A	R 79																																																																																																											
250MB	R 29	R 29	R 49	R 45	R 59	R 75	R 99																																																																																																											
500MB	R 49	R 45	R 79	R 69	R 89	R 115	R 159																																																																																																											
1GB	R 69	R 89	R 99	R 139	R 175	R 229	R 299																																																																																																											
2GB	R 99	R 145	R 179	R 235	R 295	R 389	R 499																																																																																																											
3GB	N/A	N/A	N/A	N/A	N/A	N/A	R 699																																																																																																											
5GB	N/A	N/A	N/A	N/A	N/A	N/A	R 999																																																																																																											
Voice offers - SPVR's																																																																																																																		
Daily Size	Price																																																																																																																	
	3 days*	5 days*	7 days*	10 days	14 days	21 days	30 days																																																																																																											

		Decommission Date: 15 September 2021	<table><tr><td>10 Mins</td><td>R 8</td><td>R 15</td><td>R 19</td><td>R 25</td><td>R 35</td><td>R 55</td><td>R 75</td></tr><tr><td>20 Mins</td><td>R 12</td><td>R 19</td><td>R 29</td><td>R 39</td><td>R 55</td><td>R 79</td><td>R 109</td></tr><tr><td>30 Mins</td><td>R 17</td><td>R 25</td><td>R 35</td><td>R 49</td><td>R 69</td><td>R 105</td><td>R 149</td></tr><tr><td>60 Mins</td><td>R 22</td><td>R 35</td><td>R 49</td><td>R 69</td><td>R 99</td><td>R 139</td><td>R 199</td></tr></table> <p>Source: ICASA database based on Tariff Notifications</p> <p>More information regarding the promotion is available on Vodacom’s website: https://www.vodacom.co.za/vodacom/terms/promotions/everyday-ta</p>	10 Mins	R 8	R 15	R 19	R 25	R 35	R 55	R 75	20 Mins	R 12	R 19	R 29	R 39	R 55	R 79	R 109	30 Mins	R 17	R 25	R 35	R 49	R 69	R 105	R 149	60 Mins	R 22	R 35	R 49	R 69	R 99	R 139	R 199	
10 Mins	R 8	R 15	R 19	R 25	R 35	R 55	R 75																													
20 Mins	R 12	R 19	R 29	R 39	R 55	R 79	R 109																													
30 Mins	R 17	R 25	R 35	R 49	R 69	R 105	R 149																													
60 Mins	R 22	R 35	R 49	R 69	R 99	R 139	R 199																													
Cell C Opera Bundle Gifting Promotion	This promotion offered customers a free daily Opera gifting 25MB bundle which expires at midnight after using the Opera mini browser. The free bundle is applicable only to the Opera Mini browser, the respective terms,	Filed: 03 June 2021 Launch Date: 04 June 2021 Decommission Date: 31 August 2021	<p>Table 102:Cell C Opera Gifting Bundles Promotion</p> <table><tr><th colspan="5">Opera Bundle Gifting Promotion</th></tr><tr><th>Product Description</th><th>Data Allocation</th><th>Gifting Frequency</th><th>Price</th><th>Validity</th></tr><tr><td>Opera Gifting Bundle</td><td>25MB</td><td>Daily</td><td>Free</td><td>Until Midnight</td></tr></table> <p>Source: ICASA Database Based on Tariff Notifications</p>	Opera Bundle Gifting Promotion					Product Description	Data Allocation	Gifting Frequency	Price	Validity	Opera Gifting Bundle	25MB	Daily	Free	Until Midnight	Ongoing as at 30 June 2021, however, was decommissioned on 31 August 2021.																	
Opera Bundle Gifting Promotion																																				
Product Description	Data Allocation	Gifting Frequency	Price	Validity																																
Opera Gifting Bundle	25MB	Daily	Free	Until Midnight																																

	and conditions for this are found on the operator’s website ⁵⁴ .																																	
Vodacom YouTube Promotion	Vodacom’s YouTube Promotion rewarded prepaid post-paid and hybrid customers with free YouTube bundles attached to the standard data bundles.	Filed: 15 June 2021 Launch Date: 25 June 2021 Decommission Date: 25 September 2021	<div>Table 103:Vodacom YouTube Promotion (Sample)</div> <table><tr><th>30 Day Data Bundle Allocation</th><th>YouTube Allocation (FREE)</th><th>Price</th></tr><tr><td>200MB</td><td>50MB YouTube for 1 day</td><td>R 29</td></tr><tr><td>350MB</td><td>100MB YouTube for 1 day</td><td>R 49</td></tr><tr><td>500MB</td><td>250MB YouTube for 7 days</td><td>R 69</td></tr><tr><td>1GB</td><td>500MB YouTube for 7 days</td><td>R 85</td></tr><tr><td>2GB</td><td>1GB YouTube for 7 days</td><td>R 159</td></tr><tr><td>3GB</td><td>2GB YouTube for 30 days</td><td>R 229</td></tr><tr><td>5GB</td><td>3GB YouTube for 30 days</td><td>R 349</td></tr><tr><td>10GB</td><td>5GB YouTube for 30 days</td><td>R 469</td></tr><tr><td>20GB</td><td>10GB YouTube for 30 days</td><td>R 699</td></tr></table> <div>Source: ICASA database based on Tariff Notifications</div> <div>More information regarding the promotion is available on Vodacom’s website: vodacom.co.za/vodacom/terms/promotions/youtube</div>	30 Day Data Bundle Allocation	YouTube Allocation (FREE)	Price	200MB	50MB YouTube for 1 day	R 29	350MB	100MB YouTube for 1 day	R 49	500MB	250MB YouTube for 7 days	R 69	1GB	500MB YouTube for 7 days	R 85	2GB	1GB YouTube for 7 days	R 159	3GB	2GB YouTube for 30 days	R 229	5GB	3GB YouTube for 30 days	R 349	10GB	5GB YouTube for 30 days	R 469	20GB	10GB YouTube for 30 days	R 699	Ongoing as at 30 June 2021, however, was decommissioned on 25 September 2021.
30 Day Data Bundle Allocation	YouTube Allocation (FREE)	Price																																
200MB	50MB YouTube for 1 day	R 29																																
350MB	100MB YouTube for 1 day	R 49																																
500MB	250MB YouTube for 7 days	R 69																																
1GB	500MB YouTube for 7 days	R 85																																
2GB	1GB YouTube for 7 days	R 159																																
3GB	2GB YouTube for 30 days	R 229																																
5GB	3GB YouTube for 30 days	R 349																																
10GB	5GB YouTube for 30 days	R 469																																
20GB	10GB YouTube for 30 days	R 699																																
MTN Run-On-Rate	This data service allows customers to be charged a rate equivalent to the in-	Filed: 03 March 2020.	MTN amended the Run-on-Rate service which was initially applicable to monthly internet bundles to include open market daily, weekly, and fortnightly data bundles purchased by prepaid customers.	Ongoing as at 30 June 2021.																														

⁵⁴ Available online at: < <https://www.cellc.co.za/cellc/static-content/PDF/Opera-bundle-gifting-Camapaign-TnC.pdf> > Accessed 19 September 2021

	bundle rate of their last purchased monthly bundle upon depletion of that bundle.	Amendment Date(s): 19 March 2020, 18 June 2021																	
MTN Fixed LTE - MyMTN Home Promotion	The promotion offered customers fixed LTE packages with additional promotional data.	<p>Filed: 21 June 2021</p> <p>Launch Date: 01 July 2021</p> <p>Decommission Date: 30 September 2021</p>	<p><i>Table 104: MTN Fixed LTE - MyMTN Home Promotion</i></p> <table> <tr> <th>Price plan</th><th>Standard Inclusive Value</th><th>Promo Mega Deal Data</th><th>Subscription Fee</th><th>SIM Only Subscription</th></tr> <tr> <td>My MTN Home 100GB</td><td>Anytime data-50GB Night Express data-50GB</td><td> 5GB - Promo Mega Deal Data: Home Bundle (Zoom, Skype, Cisco Webex and Google Hangouts) 15GB - Promo Mega Deal Data: Video Streaming (Showmax, DStv Now) </td><td>R 269</td><td>R 199</td></tr> <tr> <td>My MTN Home 150GB</td><td>Anytime data-75GB Night Express data-75GB</td><td> 10GB - Promo Mega Deal Data: Home Bundle (Zoom, Skype, Cisco Webex and Google Hangouts) 40GB - Promo Mega Deal Data: Video Streaming (Showmax, DStv Now) </td><td>R 399</td><td>R 299</td></tr> </table> <p><i>Source: ICASA database based on Tariff Notifications</i></p> <p>More information regarding this offer and its terms and conditions can be obtained on MTN's website: https://www.mtn.co.za/Pages/termsandconditions.aspx?pageId=1412</p>	Price plan	Standard Inclusive Value	Promo Mega Deal Data	Subscription Fee	SIM Only Subscription	My MTN Home 100GB	Anytime data-50GB Night Express data-50GB	5GB - Promo Mega Deal Data: Home Bundle (Zoom, Skype, Cisco Webex and Google Hangouts) 15GB - Promo Mega Deal Data: Video Streaming (Showmax, DStv Now)	R 269	R 199	My MTN Home 150GB	Anytime data-75GB Night Express data-75GB	10GB - Promo Mega Deal Data: Home Bundle (Zoom, Skype, Cisco Webex and Google Hangouts) 40GB - Promo Mega Deal Data: Video Streaming (Showmax, DStv Now)	R 399	R 299	Ongoing as at 30 June 2021, however, was decommissioned on 30 September 2021.
Price plan	Standard Inclusive Value	Promo Mega Deal Data	Subscription Fee	SIM Only Subscription															
My MTN Home 100GB	Anytime data-50GB Night Express data-50GB	5GB - Promo Mega Deal Data: Home Bundle (Zoom, Skype, Cisco Webex and Google Hangouts) 15GB - Promo Mega Deal Data: Video Streaming (Showmax, DStv Now)	R 269	R 199															
My MTN Home 150GB	Anytime data-75GB Night Express data-75GB	10GB - Promo Mega Deal Data: Home Bundle (Zoom, Skype, Cisco Webex and Google Hangouts) 40GB - Promo Mega Deal Data: Video Streaming (Showmax, DStv Now)	R 399	R 299															
MetroFibre GigaGo	The MetroFibre GigaGo Vumatel	Filed: 22 June 2021	<i>Table 105: MetroFibre GigaGo Vumatel Promotion</i>	Ongoing as at 30 June 2021,															

Vumatel Promotion	Promotion offers FTTH customers a reduced rate of R 799 per month for a period of 12 months, after which the full package price of R 899 will apply.	Launch Date: 01 July 2021 Decommission Date: 31 July 2021	<table><tr><th>Product Description</th><th>Price</th><th>Duration</th></tr><tr><td>20Mbps</td><td>R 799</td><td>12 Months</td></tr></table>			Product Description	Price	Duration	20Mbps	R 799	12 Months	however it was decommissioned on 31 July 2021.			
			Product Description	Price	Duration										
			20Mbps	R 799	12 Months										
Source: ICASA Database Based on Tariff Notifications															
MetroFibre GigaGo Go50 Vuma Promotion	The MetroFibre GigaGo Go50 Vuma Promotion which is applicable to the 50Mbps package offers FTTH customers a reduced rate of R 799 per month for a period of 12 months, after which the full package price of R 1 045 will apply.	Filed: 23 June 2021 Launch Date: 01 July 2021 Decommission Date: 31 July 2021	<table><tr><th colspan="3">Table 106: MetroFibre GigaGo Vumatel Promotion</th></tr><tr><th>Product Description</th><th>Price</th><th>Duration</th></tr><tr><td>50Mbps</td><td>R 799</td><td>12 Months</td></tr></table>			Table 106: MetroFibre GigaGo Vumatel Promotion			Product Description	Price	Duration	50Mbps	R 799	12 Months	Ongoing as at 30 June 2021, however it was decommissioned on 31 July 2021.
			Table 106: MetroFibre GigaGo Vumatel Promotion												
			Product Description	Price	Duration										
50Mbps	R 799	12 Months													
Source: ICASA Database Based on Tariff Notifications															

Annexure B: Promotions that Ended During the Period Under Review

TARIFF PLAN	EXPLANATION OF THE TARIFF PLAN	RELEVANT DATES
C NBO Bundles Promotion	Cell C's NBO Data Bundles Promotion offered selected prepaid and top-up customers promotional open data, URL-specific data and voice minutes, depending on their data usage and general spend.	<p>Filed: 09 September 2020</p> <p>Launch Date: 10 September 2020</p> <p>Amendment Date: 12 January 2021, 28 January 2021, 12 February 2021, 02 March 2021, 19 March 2021, 26 March 2021, 16 April 2021, 23 April 2021</p> <p>Decommission Date: 24 April 2021</p>
Telkom Summer of Monate Promotion	The promotion offered prepaid, post-paid and top-up customers discounted voice minutes, data and social bundles under the "10 th Birthday Monate Bundles".	<p>Filed: 11 September 2020</p> <p>Launch Date: 20 September 2020</p> <p>Extension Date(s): 14 January 2021</p> <p>Decommission Date: 31 March 2021</p>
MTN Prepaid Back to School Promotions	MTN's Prepaid Back to School Promotions offered customers discounted data bundles to enable them to study and/or work from	<p>Filed: 15 January 2021</p> <p>Launch Date: 19 January 2021</p>

	<p>home during the COVID-19 pandemic period. The promotional offers were as follows:</p> <ul style="list-style-type: none"> • MTN Back2School Home Wi-Fi Device Deal • MTN Back2School Home Wi-Fi SIM Only offer • MTN Back2School Tablet Deal offer 	Decommission Date: 31 March 2021
MetroFibre GIGAGO Go10 VUMA SPECIAL Promotion	The MetroFibre GIGAGO Go10 VUMA SPECIAL Promotion offered customers a reduced rate at R 593 (-10%) on the 10Mbps package for a period of 12 months from the date of activation.	<p>Filed: 18 January 2021</p> <p>Launch Date: 01 February 2021</p> <p>Decommission Date: 05 March 2021</p>
Cell C All-In-One Double Social Bundle	The Cell C All-In-One Double Social Bundle was available to all Cell C prepaid and Top Up customers who purchased a qualifying All-In-One bundle.	<p>Filed: 04 August 2020</p> <p>Launch Date: 12 August 2020</p> <p>Extension Date: 21 January 2021</p> <p>Decommission Date: 28 February 2020</p>
Cell C Upfront Payment Bundles and Double Data Promo	Cell C's Upfront Payment Bundles and Double Data Promo were offered to prepaid, post-paid and top-up customers, with bundles available for a once-off fee and they include the allocation of data every 30 days over 12 instalments.	<p>Filed: 11 November 2020</p> <p>Launch Date: 16 November 2020</p> <p>Extension Date (s): 21 January 2021, 19 March 2021</p>

		Decommission Date: 31 March 2021 (initial), 30 June 2021
Cell C On Us Discount Data Bundles Promotion	Cell C's On Us Discount Data Bundles were offered to prepaid customers, with bundles discounted from 20 – 80%.	<p>Filed: 24 January 2020</p> <p>Launch Date: 05 February 2020</p> <p>Extension Date(s): 19 January 2021</p> <p>Decommission Date: 24 April 2021</p>
MTN MoMo Black Friday Hourly 1GB Promotion	MTN initially filed its MoMo Black Friday Promotion on 18 November 2020 wherein it offered promotional data bundles exclusive to MTN Mobile Money (MoMo) customers. The condition was that customers ought to have active MTN MoMo wallets with a positive balance to purchase the black Friday bundles. MTN offered the daily 1GB data bundle for R 1, which is R 29 less than the retail price.	<p>Filed: 18 November 2020</p> <p>Launch Date: 20 November 2020</p> <p>Extension Date(s): 08 December 2020, 29 January 2021</p> <p>Decommission Date: 28 February 2021</p>
MTN Personalised Back to School Bundles	MTN's Personalised Back to School Bundles offered students, working class and business customers discounted voice minutes, data bundles and integrated bundles with either daily, weekly and/or monthly validity periods.	<p>Filed: 29 January 2021</p> <p>Launch Date: 02 February 2021</p> <p>Decommission Date: 31 March 2021</p>
Vodacom on Frogfoot FTTH Promotion	Vodacom's Frogfoot FTTH promotion offered customers one-month free subscription for fibre packages on the Frogfoot network.	<p>Filed: 08 February 2021</p> <p>Launch Date: 09 February 2021</p>

		Decommission Date: 28 February 2021
MetroFibre KZN Termination Point Special	The MetroFibre KZN Termination Point Special applied to customers who reside in certain KwaZulu-Natal suburbs that are covered by the MetroFibre network and entailed the installation of a fibre infrastructure point at a residence at no cost subject to the homeowner/occupant placing an order for a fibre data service simultaneously with the order for installation.	Filed: 08 February 2021 Launch Date: 15 February 2021 Decommission Date: 15 May 2021
MetroFibre Pietermaritzburg Termination Point Special	The MetroFibre KZN Termination Point Special applied to customers who reside in the Pietermaritzburg/Howick/Hilton area that are covered by the MetroFibre network and entailed the installation of a fibre infrastructure point at a residence at no cost subject to the homeowner/occupant placing an order for a fibre data service simultaneously with the order for installation.	Filed: 23 February 2021 Launch Date: 02 March 2021 Decommission Date: 30 April 2021
Cell C On Us Social Bundles Promotion	Cell C offered customers access to social media platforms such as Instagram, TikTok, Twitter and YouTube through On Us Social Bundles which offer data ranging from 40MB to 2GB on the listed social media platforms.	Filed: 25 March 2021 Launch Date: 29 March 2021 Amendment: 16 April 2021 Decommission Date: 24 April 2021
Cell C On Us Discount Voice Bundles Promotion	Cell C's On Us Discount Voice Promotion Bundles were offered to prepaid customers, with bundles discounted from 20% - 80%	Filed: 24 January 2020 Launch Date: 05 February 2020 Amendment: 25 March 2021

		Decommission Date: 24 April 2021
Cipherwave Home Network FTTH	The promotion on the Cipherwave Home Network FTTH entailed 3 months free internet access for new customers to any FTTH package, where the regular monthly fee applied after the 3-month period.	<p>Filed: 11 September 2020</p> <p>Launch Date: 20 September 2020</p> <p>Amendment Date(s): 31 March 2021</p> <p>Decommission Date: 15 May 2021</p>
FWORX Promotional Top-Ups	Franscois O’Kennedy’s FWORX Promotional Top-Ups offered customers data ranging from 5GB to 20GB priced at R 50 and R 175, respectively. Customers were able to roll over any unused data for an additional 30 days over and above the 30-day validity of the promotion.	<p>Filed: 08 April 2021</p> <p>Launch Date: 26 April 2021</p> <p>Decommission Date: 30 April 2021</p>
Cell C On Us WhatsApp Bundle Promotion	The discount at which a bundle is offered is selected based on the time of day, network cell and segment which a subscriber falls into. The On Us WhatsApp Bundle shall not be allowed to be depleted for any other data usage, only usage through the IP addresses configured for WhatsApp. WhatsApp (VOIP) Calls incur additional data costs outside the On Us WhatsApp Bundle.	<p>Filed: 09 April 2020</p> <p>Launch Date: 10 April 2020</p> <p>Extension Date(s): 19 January 2020</p> <p>Decommission Date: 24 April 2021</p>
Cell C On Us Longer Duration Bundles Promotion	Cell C’s On Us Longer Duration Bundles Promotions offers prepaid customers discounted open data, URL-specific data and all-net minutes. The discount at which a bundle is offered will be selected	<p>Filed: 18 September 2020</p> <p>Launch Date: 21 September 2020</p>

	based on the time of day, network cell and segment which a subscriber falls into.	Decommission Date: 24 April 2021
SADV Fibre Fast Uncapped (Vuma promo)	SADV's Fibre Fast Uncapped (Vuma promo) offered customers FTTH packages on the Vumatel network with line speeds ranging from 10/10Mbps to 1000/1000Mbps.	Filed: 28 April 2021 Launch Date: 30 April 2021 Decommission Date: 30 June 2021
MTN Youth Month Promotion	MTN's Youth Month Promotion offered new and existing MTN Pulse subscribers who successfully opt-in to the Youth Pulse Promotion in the month of June 2021, a free daily 1GB Social Pass Bundle once a week for the duration of the month.	Filed: 20 May 2021 Launch Date: 24 May 2021 Decommission Date: 30 June 2021
MWEB Winter Deal Promotion	The MWEB Winter Deal Promotion offers new fibre customers a one-month free subscription. The promotion however excludes Vumatel and Vuma Reach products.	Filed: 21 May 2021 Launch Date: 01 June 2020 Decommission Date: 31 July 2021