



Independent Communications Authority of South Africa

Independent Communications Authority of South Africa

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BI-ANNUAL REPORT ON THE ANALYSIS OF TARIFF NOTIFICATIONS SUBMITTED TO ICASA FOR THE PERIOD 01 JULY 2021 TO 31 DECEMBER 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.

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Glossary

TERM	DEFINITION
Dynamic tariffs	Dorgham (2015) defines these tariff plans are 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 the price 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 the 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 July 2021 to 31 December 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 July 2021 to 31 December 2021.

Table 1: Type of Notifications Received - 01 July 2021 to 31 December 2021

Notification Type	Cell C	MTN	Telkom	Vodacom	MetroFibre	OLOs	Grand Total
Amendment	31	29	7	17	1	20	105
Extension	14	6	3	3	-	-	26
New Product	5	14	3	23		20	65
Promotion	9	25	7	13	14	5	73
Termination	-	1	-	-	-	-	1
Grand Total	59	75	20	56	15	45	270

Source: ICASA Database based on Tariff Notifications

The Authority received a total of 270 tariff notifications, which included 73 new promotions, 105 amendments, 26 extensions, 65 new products and 1 termination during the period under review, i.e., 01 July 2021 to 31 December 2021.

¹ There are instances whereby information reported in this report falls outside of this review period. 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 or any other prepaid data bundles offered by various licensees which were possibly 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.

In the mobile data services market, salient changes in the period under review were the amendments of the 30-day standard prepaid data bundles by all four major operators. MTN reduced the prices of its 200MB, 350MB, 500MB, 1GB, 1.5GB, 2GB, 3GB, 6GB, 20GB, 50GB and 100GB data bundles. For example, the 1GB data realised a 14.1% price reduction from R 99 to R 85. Telkom Mobile's amendment entailed the price reduction of the 1GB data bundle by 20.2%, from R 99 to R 79 and the introduction of the 1.5GB data bundle at a price of R 89. Vodacom reduced the price of its 2GB, 50GB and 100GB from R 159, R 1 499 and R 2 399 to R 149, R 799 and R 999, respectively. Vodacom also introduced the 4GB, 6GB and 15GB data bundles in its 30-day standard prepaid data bundle plan. Cell C's amendment entailed the replacement of the 80MB, 150MB, 325MB and 800MB data bundles with the 100MB, 200MB, 350MB, 500MB, respectively. Cell C also introduced 4GB and 30GB data bundles at R 249 and R 699, respectively. Furthermore, Cell C reduced the prices of the 1GB, 1.5GB, 2GB, 3GB, 10GB and 20GB data bundles. For example, the 1GB prepaid 30-day standard data bundle had a 10.5% decrease in price from R 95 to R 85.

In the voice services market, Cell C filed amendments to the flat-rate tariffs of the MegaBonus and UltraBonus tariff plans. The flat-rate of the MegaBonus tariff plan was increased by 45.3% from R 1.72 to R 2.50 per minute, while the UltraBonus flat-rate was increased by 25% from R 2 to R 2.50 per minute. The Authority also received a number of notifications regarding the introduction and/or amendment of voice bundles from the Mobile Network Operators (MNOs). For example, MTN filed its prepaid Personalised Bozza Talk Bundles, wherein it offers voice bundles with low effective rates based on their individual spend profiles and/or locations in the country.

The National State of Disaster is still in place and as such the ICT COVID-19 National Disaster Regulations, 2020 which prescribe minimum standards which licensees must follow during this period were in force until 10 November 2021. There were amendments of these Regulations during the period under review

which were published on 31 August 2021². The 2020 Regulations were repealed by the ICT COVID-19 National State of Disaster Regulations, 2021 published on 11 November 2021³. The current Regulations did not extend the validity of the temporary radio frequency spectrum licences issued in April 2020⁴ and these licences were terminated on 30 November 2021. As such, licensees were required to apply for the assignment of provisional radio frequency spectrum licence and pay pro-rated radio frequency spectrum licence fees for the period commencing on 01 December 2021 to 30 June 2022. Furthermore, a licensee assigned with provisional spectrum in terms of the ICT COVID-19 National State of Disaster Regulations⁵, must maintain network connectivity in line with regulatory requirements for the schools allocated respectively to it by the Authority, free of charge, for a period of 12 months from the date determined by the Authority.

The Authority also conducted a brief comparative analysis of fibre packages for current prices⁶ and average prices of four different fibre line speeds offered by fibre service providers on various fibre networks. For example, on the 20/20Mbps line speed, Cybersmart's 20/20Mbps package on the Vodacom network is priced 47% above the average of R 777, while Cybersmart's Big Bay MPOA 20/20Mbps package is priced 49% below average for the same line speed.

² The amendment culminated into the ICT COVID-19 National Disaster Sixth Amendment Regulations, 2021, Government Gazette 45069. Available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/ict-covid-19-national-disaster-sixth-amendment-regulations> > Accessed on 18 January 2022.

³ The current Regulations, 2021, Government Gazette 45458. Available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/ict-covid-19-national-disaster-seventh-amendment-regulations> > Accessed on 18 January 2022.

⁴ Government Gazette No. 43207, Notice 238 of 2020.

⁵ Government Gazette No. 45458, Notice 661 of 2021.

⁶ As at 31 December 2021.

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 regulation 4 of the ICT COVID-19 National Disaster Regulations, 2020, as amended and ICT COVID-19 National State of Disaster Regulations, 2021; during the period of 01 July 2021 to 31 December 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 2021/22 FY second quarter (Q2) 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 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, Comparative Analysis of Fibre Products;
and

- Section 3 provides concluding remarks.

An overview of other⁷ prepaid tariff notifications filed during the period under review is then depicted in Annexure A and it shows that there has potentially 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.

⁷ 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 31 December 2021.

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 Network Operators (“MVNOs”) subsequent to the previous 2021/22FY Q2 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 the 30-day standard prepaid data bundles 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 Current Prices) 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 2021/22 FY Q2 Bi-annual Tariff Analysis Report, which was published on ICASA’s website on 01 October 2021⁸.

In the period under review, the Authority received amendment notifications with respect to 30-day standard prepaid data bundles from all the four major MNOs.

⁸ Pages 20-21, available online at: < <https://www.icasa.org.za/legislation-and-regulations/tariffs-analysis-report-01-jan-to-30-jun-2021> > Accessed on 06 January 2022.

MTN filed its amendment notifications on 20 July 2021 and 20 August 2021. Telkom Mobile, Vodacom and Cell C filed their amendment notifications on 24 August 2021, 22 September 2021 and 29 September 2021, respectively. It should be noted that MTN and Telkom Mobile's amendments were incorporated in the 2021/22 FY Q2 Bi-annual Tariff Analysis Report. This was done to ensure that the report is not retrospective, it was imperative that such significant amendments be incorporated in the report to reflect data prices that were prevailing in the market. The 2021/22 FY Q2 Bi-annual Tariff Analysis Report can be found on the Authority's website⁹.

Vodacom's amendment entailed the price reductions of the 2GB, 50GB and 100GB data bundles. Vodacom also introduced the 4GB, 6GB, 15GB and 30GB data bundles. Table 2 below shows that Vodacom reduced the price of its 30-day standard prepaid 2GB data bundle by R 10 or 6.3% from R 159 to R 149. The operator's new 4GB is priced at R 249, and it is the only MNO that offers a 4GB standard 30-day prepaid data bundle. The 5GB data bundle offered at R 349 was replaced by the 6GB data bundle offered for the same price, which means that there was an increase of data volume by 1GB or 20% at no extra charge. It is worth noting that Vodacom and MTN currently offer their 6GB data bundles for the same monetary value, whereas Cell C offers same data volume for R 299, which is R 100 or 14.3% less than what the two operators charge. The 15GB and 30GB data bundles were introduced in the market at R 529 and R 699, respectively. Vodacom also reduced the prices of the 30-day standard prepaid 50GB and 100GB data bundles by 46.7% and 58.4%, from R 1 499 and R 2 399 to R 799 and R 999, respectively, as shown in the table.

Cell C's amendment entailed the replacement of the 80MB, 150MB, 325MB and 800MB data bundles. The operator introduced the 100MB, 200MB, 350MB, 500MB, 4GB and 30GB data bundles. The amendment also entailed price reductions of the 1GB, 1.5GB, 2GB, 3GB, 10GB and 20GB data bundles. For example, the 1.5GB prepaid 30-day standard prepaid data bundle had a 33.6% decrease in price from R 149 to R 99. Table 3 below shows that Cell C increased the data bundle volume

⁹ Pages 18-27, available online at: < <https://www.icasa.org.za/legislation-and-regulations/tariffs-analysis-report-01-jan-to-30-jun-2021> > Accessed on 06 January 2022.

of its 30-day standard prepaid 80MB and 150MB to 100MB and 200MB, while the price remained unchanged at R 15 and R 29, respectively. The 325MB data bundle offered at R 49 was replaced by the 350MB data bundle offered at R 45, which is priced at R 4 less yet offering 25MB more data volume than the previously offered 325MB data bundle. The operator reintroduced its 500MB at R 65, replacing the 800MB data bundle which was offered at R 80. The 1GB data bundle price was reduced by R 10 or 10.5% from R 95 to R 85. Cell C also reduced the prices of the 30-day standard prepaid 1.5GB, 2GB, 3GB, 10GB and 20GB data bundles as shown in the table.

Table 2: 30-day Standard Prepaid Data Bundles Prices and OOB Equivalent Prices for Vodacom and MTN

Bundle Size (MB)	Vodacom						MTN			
	Previous (2020/21 FY Q2) Normal Prices	Current Prices	OOB Equivalent Subscription Fee (R 0.49 per MB)	Variance in Rands (OOB Equivalent v/s Current Price)	Variance (%) Previous v/s Current Price	Tariff rate per megabyte	Current Prices	OOB Equivalent Price (R 0.49 per MB)	Variance in Rands (OOB Equivalent v/s Price)	Tariff rate per megabyte
50	R 12	R 12	R 24.50	R 12.50	0%	R 0.24	R 10 (40MB)	R 20	R 10	R 0.25
100	N/A***						R 20	R 49	R 29	R 0.20
200	R 29	R 29	R 98	R 69	0%	R 0.15	R 29	R 98	R 69	R 0.15
350	R 49	R 49	R 171.50	R 122.50	0%	R 0.14	R 49	R 172	R 122.50	R 0.14
500	R 69	R 69	R 245	R 176	0%	R 0.14	R 69	R 245	R 176	R 0.14
1024	R 85	R 85	R 501.76	R 416.76	0%	R 0.08	R 85	R 502	R 416.76	R 0.08
1536	N/A						R 99	R 753	R 653.64	R 0.06
2048	R 159	R 149	R 1 003.52	N/A	-6.3%	R 0.07	R 149**	R 1 004	R 854.52	R 0.07
3072	R 229	R 229	R 1 505.28	R 1 276.28	0%	R 0.07	R 199**	R 1 505	R 1 306.28	R 0.06
4096	N/A	R 249	R 2 007.04	R 1 758.04	N/A	R 0.06	N/A			
5120	R 349	Discontinued					R 299**	R 2 509	R 2 209.80	R 0.06
6144	N/A	R 349	R 3 010.56	R 2 661.56	N/A	R 0.06	R 349**	R 3 011	R 2 661.56	R 0.06
10240	R 469	R 469	R 5 017.60	R 4 548.60	0%	R 0.05	R 469**	R 5 018	R 4 548.60	R 0.05
15360	N/A	R 529	R 7 526.40	R 6 997.40	N/A	R 0.03	N/A			
20480	R 699	Discontinued					R 599**	R 10 035	R 9 436.20	R 0.03
30720	N/A	R 699	R 15 052.80	R 14 353.80	N/A	R 0.02	N/A			
51200	R 1 499	R 799	R 25 088	R 24 289	-46.7%	R 0.02	R 799**	R 25 088	R 24 289	R 0.02
102400	R 2 399	R 999	R 50 176	R 49 177	-58.4%	R 0.01	R 999**	R 50 176	R 49 177	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: 30-day Standard Prepaid Data Bundles Prices and OOB Equivalent Prices for Cell C and Telkom Mobile

Bundle Size (MB)	Previous (2020/21 FY Q2) Normal Price	Current Prices	Cell C				Telkom Mobile			
			OOB Equivalent Price (R1.10/MB)	Variance in Rands (OOB Equivalent v/s Price)	Variance (%) Previous v/s Current Price	Tariff rate per MB	Current Prices	OOB Equivalent Price (R 0.30/MB)	Variance in Rands (OOB Equivalent v/s Price)	Tariff rate per MB
35	R 10 (40MB)	R 10 (40MB)	R 44	R 34	0%	R 0.25	R 7**	R 10.50	R 3.50	R 0.20
75	R 15 (80MB)	R 15 (100MB)	R 88	R 73	0%	R 0.15	R 14**	R 22.50	R 8.50	R 0.19
150	R 29	R 29 (200MB)	R 165	R 136	0%	R 0.15	R 29**	R 45	R 16	R 0.19
250	R 35	R 35	R 275	R 240	0%	R 0.14	N/A			
300	R 49 (325MB)	R 45 (350MB)	R 358	R 312.50	N/A	R 0.13	R 49**	R 90	R 41	R 0.16
500	R 80 (800MB)	R 65	R 880	R 815	N/A	R 0.13	R 69**	R 150	R 81	R 0.14
1024	R 95	R 85**	R 1 126.40	R 1 041.40	-10.5%	R 0.08	R 79**	R 307.20	R 228.20	R 0.08
1536	R 149	R 99**	R 1 689.60	R 1 590.60	-33.6%	R 0.06	R 89**	R 460.80	R 371.80	R 0.06
2048	R 199	R 149**	R 2 252.80	R 2 103.80	-25.1%	R 0.07	R 139**	R 614.40	R 475.40	R 0.07
3072	R 249	R 199**	R 3 379.20	R 3 180.20	-20.1%	R 0.06	R 199**	R 921.60	R 722.60	R 0.06
4096	N/A	R 249**	R 4 505.60	R 4 256.60	N/A	R 0.06	N/A			
5120	N/A						R 299**	R 1 536	R 1 237	R 0.06
6144	R 299	R 299**	R 6 758.40	R 6 459.40	0%	R 0.05	N/A			
10240	R 499	R 469**	R 11 264	R 10 795	-6%	R 0.05	R 469**	R 3 072	R 2 603	R 0.05
20480	R 799	R 599	R 22 528	R 21 929	-25%	R 0.03	R 699	R 6 144	R 5 445	R 0.03
30720	N/A	R 699	R 33 792	R 33 093	N/A	R 0.02	N/A			
51200	R 1 199 (40GB)	R 1 199 (40GB)	R 56 320	R 55 121	0%	R 0.02	R 1 499	R 15 360	R 13 861	R 0.03
102400	R 2 999	R 2 999	R 112 640	R 109 641	0%	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 Cell C, MTN and Vodacom currently offer their 30-day standard prepaid 200MB data bundle for R 29, which can be translated to an in-bundle rate (i.e., tariff rate per megabyte) of R 0.15 per MB. Telkom currently offers its 150MB data bundle for R 29, therefore having the highest in-bundle rate of R 0.19 per MB when compared to the other three MNOs.

Cell C currently charges the lowest on the 300MB to 350MB data bundle range, offering its 350MB data bundle for R 45, which can be translated to a R 0.13 per MB in-bundle rate. Vodacom and MTN offer their respective 350MB data bundles for R 49, which can be translated to a R 0.14 per MB in-bundle rate. Telkom Mobile still 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.

The most affordable 30-day prepaid 500MB data bundle is currently offered by Cell C, at R 65, with an in-bundle rate of R 0.13 per MB. The operator reintroduced the 500MB data bundle in the period under review. MTN, Telkom Mobile and Vodacom all have their respective 500MB data bundle prices at R 69, which is R 4 or 6.2% higher than what Cell C charges.

Cell C reduced the price of its 30-day standard prepaid 1GB data bundle by R 10 or 10.5%, from R 95 to R 85 (i.e., R 0.08 per MB in-bundle rate), which is equivalent to what Vodacom and MTN charge for the same data volume. However, Telkom Mobile offers the most affordable 30-day standard prepaid 1GB data bundle priced at R 79.

Cell C also reduced the price of its 30-day standard prepaid 1.5GB data bundle by R 50 or 33.6%, from R 149 to R 99 (i.e., R 0.06 per MB in-bundle rate), making it equivalent to what MTN charges for the same data volume. However, Telkom Mobile offers the most affordable 30-day standard prepaid 1.5GB data bundle priced at R 89.

MTN, Vodacom and Cell C currently offer their respective 30-day standard prepaid 2GB data bundles at R 149, which is translatable to a R 0.07 per MB in-bundle rate. Telkom Mobile offers the most affordable 2GB data bundle at R 139, which

translates to R 0.07 per MB in-bundle rate. The three operators charge R 10 or 7.2% more than what Telkom Mobile charges for the 2GB data bundle.

Cell C's 30-day standard prepaid 3GB data bundle was reduced by R 50 or 20.1% from R 249 to R 199, making it the most affordable 3GB data bundle along with Telkom Mobile and MTN, with their respective in-bundle rates at R 0.06 per MB. Vodacom offers the least affordable 30-day standard prepaid 3GB data bundle at R 229 (i.e., R 0.07 per MB in-bundle rate), which is R 30 or 15.1% higher than what Cell C, Telkom Mobile and MTN currently charge.

MTN and Telkom Mobile currently charge the least for the 30-day standard prepaid 5GB data bundle, pricing it at R 299 (i.e., R 0.06 per MB in-bundle rate). It should be noted that Vodacom and Cell C currently do not offer the 5GB data bundle, however they offer 4GB and 6GB data bundles. Vodacom's 4GB and 6GB data bundles are priced at R 249 and R 349, respectively, while Cell C's 4GB and 6GB data bundles for R 249 and R 299, respectively. Therefore, priced at R 299 (i.e., R 0.05 per MB in-bundle rate), Cell C's 6GB data bundle has the lowest in-bundle rate in the 4GB to 6GB data bundle range.

Cell C also reduced the price of its 30-day standard prepaid 10GB data bundle by R 30 or 6% from R 499 to R 469. Therefore, all four MNOs currently offer the standard 30-day prepaid 10GB data bundle for R 469.

Cell C's 30-day standard prepaid 20GB data bundle realised a R 200 or 25% price reduction from R 799 to R 599. This amendment resulted in Cell C and MTN offering the most affordable 20GB data bundle among the four MNOs. Telkom Mobile offers its 20GB data bundle for R 699, which is 16.7% higher than what Cell C and MTN charge. It should be noted that Vodacom's 20GB data bundle offered at R 699 was replaced with a 30GB data bundle which is also priced at R 699 as the previous 20GB. This means that customers receive 10GB or 50% more data while the price remains unchanged.

It is also worth noting that Cell C introduced a 30-day standard prepaid 30GB data bundle which it offers for R 699. Therefore, for R 699 customers receive 10GB

more on Vodacom and Cell C than what Telkom Mobile customers receive, since Telkom Mobile charges R 699 for a standard 30-day prepaid 20GB data bundle.

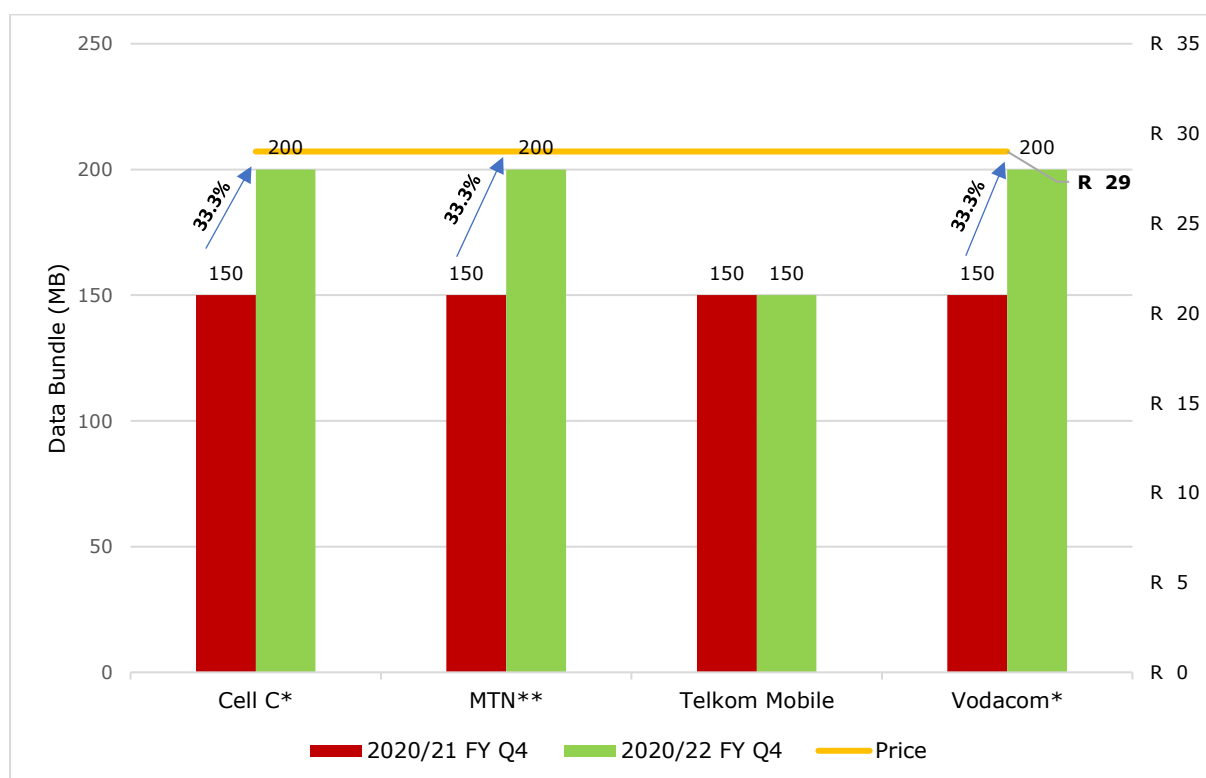
Vodacom's 30-day standard prepaid 50GB data bundle realised a R 700 or 46.7% price reduction from R 1 499 to R 799, which is the same as MTN's amendment that was filed with the Authority on 20 July 2021. The subsequent price adjustment by Vodacom is likely to be an indication of the operator's effort to charge competitive prices in the market. Vodacom and MTN currently offer the most affordable 50GB data bundle among the four operators. Cell C still offers 40GB data bundle at R 1 199, which is R 400 or 50% more than what Vodacom and MTN charge for their 50GB data bundles. Telkom Mobile offers the least affordable 50GB data bundle at R 1 499, which is R 700 or 87.6% more than what Vodacom and MTN charge for the same data volume.

Vodacom also reduced the price of its 30-day standard prepaid 100GB data bundle by R 1 400 or 58.4% from R 2 399 to R 999. It is worth noting that the operator's 100GB data bundle price reduction follows that of MTN's, which was filed with the Authority on 20 July 2021, where MTN reduced its 100GB data bundle by R 1 500 60% from R 2 499 to R 999. Therefore, Vodacom's price reduction is perceived to be the operator's effort to remain competitive to its rival. It is evident that increased competition among rival firms reduces prices/cost to communicate and promotes innovation in the market. Telkom Mobile currently prices its 100GB data bundle at R 2 999, which is R 1 500 or 150.2% more than what Vodacom and MTN charge for their 100GB data bundles. Cell C offers the least affordable 100GB data bundle at R 2 999, which is R 2 000 or 200.2% more than what Vodacom and MTN charge for the same data volume.

2.1.1.1.2. Year-on-Year Changes on selected 30-day Standard Prepaid Data Bundles

Figures 1 to 4 depict year-on-year changes that happened on the 150MB, 500MB, 1GB and 2GB 30-day standard prepaid data bundles, respectively, since the 2020/21 FY Q4 Bi-annual Tariff Analysis Report.

Figure 1: Y-o-Y Data Price and volume changes for 150MB standard 30-day prepaid data bundles



*Vodacom and Cell C replaced their 150MB data bundles with 200MB in the period under review while their respective prices remained at R 29

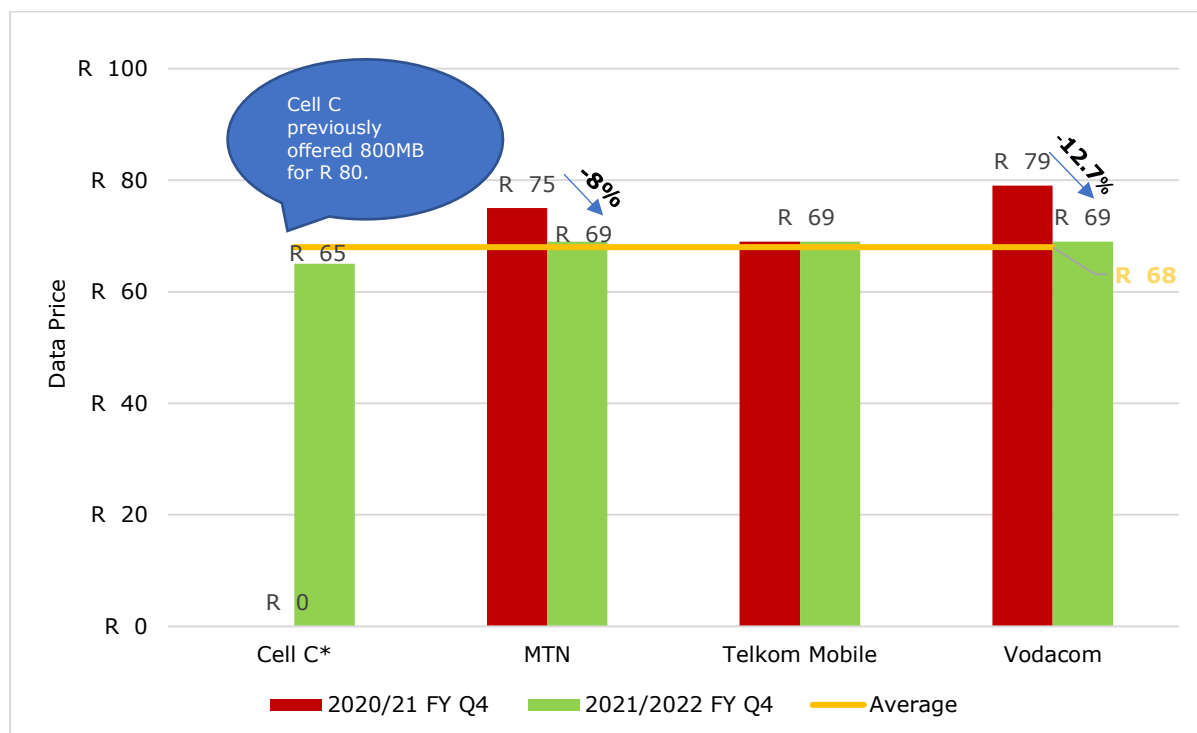
**MTN discontinued its 150MB data bundle it offered at R 29 and reduced the price of the 200MB data bundle from R 39 to R 29

Source: ICASA Database Based on Tariff Notifications

In the 2020/21 FY Q4 to 2021/22 FY Q4 period, Vodacom and Cell C filed amendments to their 150MB prepaid data bundles wherein they upsized their respective data bundles by 50MB while the prices remained unchanged at R 29. 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 on 20 July 2021 from R 39 to R 29, therefore the in-bundle rate decreased from R 0.20 per MB to R 0.15 per MB. Telkom Mobile currently offers its 150MB data bundle at R 29, which is

the least affordable bundle in the 150MB to 200MB range, with an in-bundle rate of R 0.19 per MB.

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

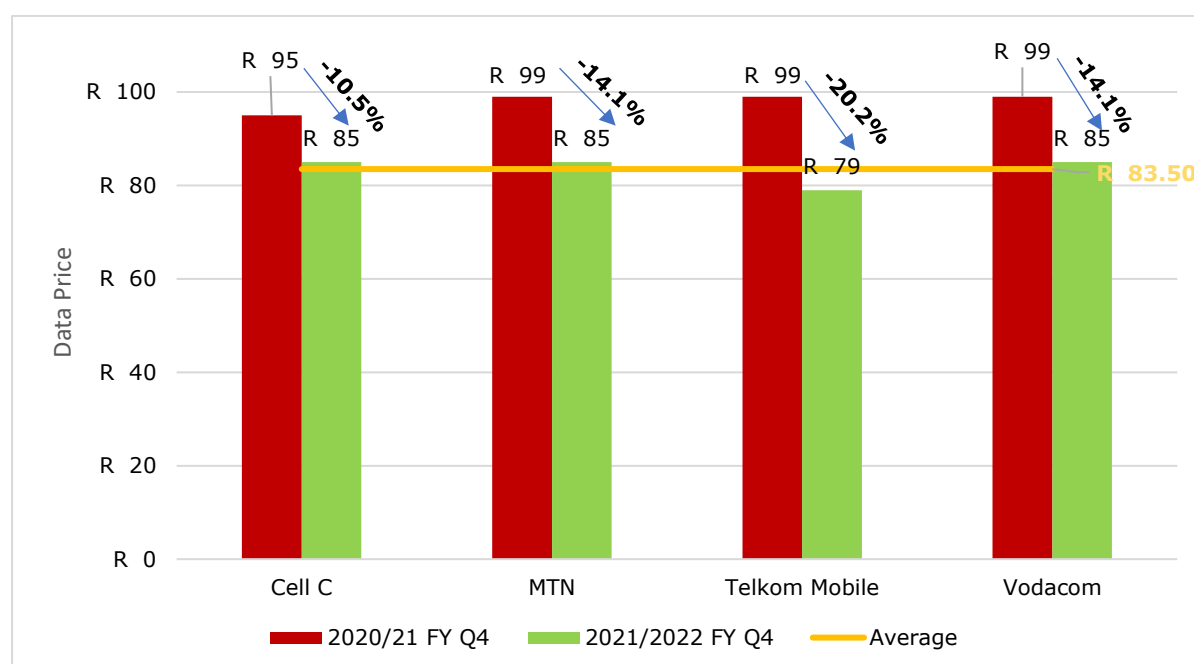


*Cell C offered the 800MB data bundle for R 80 and has replaced it with the 500MB for R 65.

Source: ICASA Database Based on Tariff Notifications

Figure 2 above depicts that in the 2020/21 FY Q4 to 2021/22 FY Q4 period, three of the four operators amended their 500MB data bundles, namely Vodacom, MTN and Cell C. Vodacom amended the price of its 500MB data bundle, reducing it by R 10 or 12.7% from R 79 to R 69, which can be translated to an in-bundle rate of R 0.14 per MB. MTN also revised the price of its 500MB data bundle in the period under review wherein the price was reduced by R 6 or 8% from R 75 to R 69. Cell C replaced its 800MB data bundle which it offered for R 80 with a 500MB data bundle offered for R 65, thus making it the most affordable 500MB among the four operators. No amendment has been made by Telkom Mobile on its 500MB in the 2020/21 FY Q4 to 2021/22 FY Q4 period, which is still offered for R 69. On average, the 30-day standard prepaid 500MB data bundle is priced at R 68, based on the prices for this data bundle across the four MNO's.

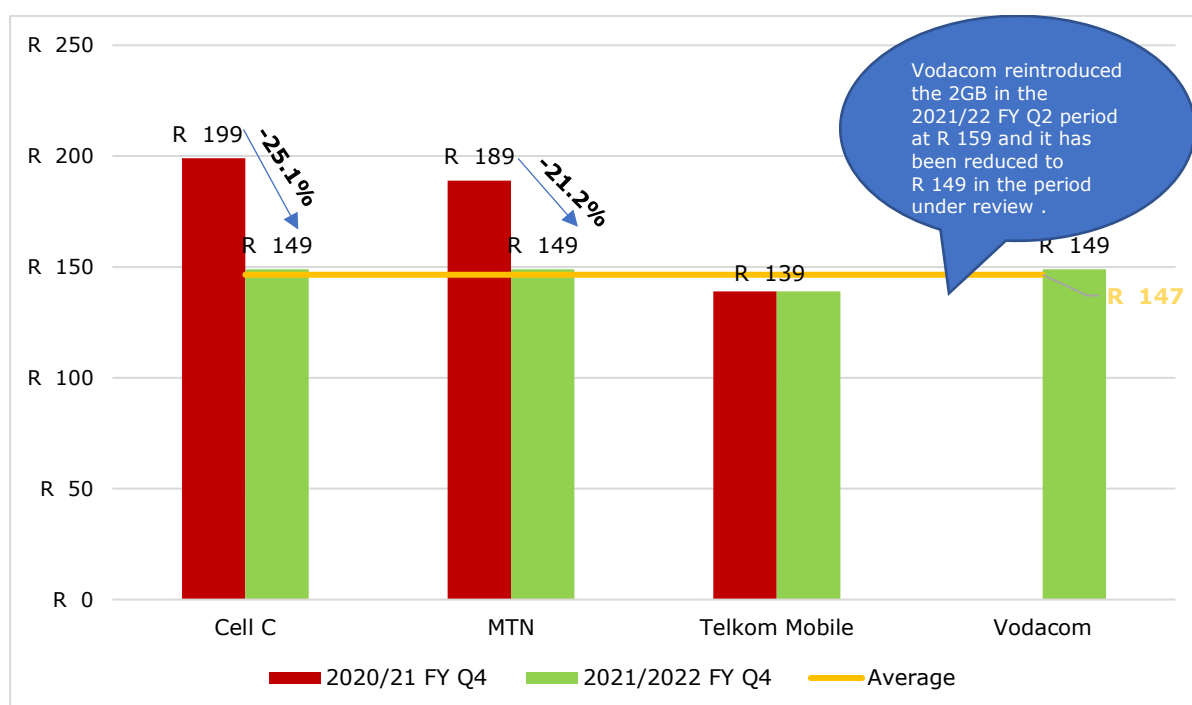
Figure 3: Y-o-Y Data Price changes for 1GB standard 30-day prepaid data bundles



Source: ICASA Database Based on Tariff Notifications

Figure 3 above shows that all four operators amended their respective 30-day standard prepaid 1GB data bundles in the 2020/21 FY Q4 to 2021/22 FY Q4 period. The largest price decrease in both absolute and percentage terms occurred on Telkom Mobile, wherein the 1GB data bundle price decreased by R 20 or 20.2% from R 99 to R 79, making it the most affordable 1GB prepaid data bundle amongst the four operators. Vodacom and MTN reduced the prices of their 1GB data bundles, both by R 14 or 14.1%, from R 99 to R 85. Cell C also reduced its 1GB data bundle price on 29 September 2021, by R 10 or 10.5%, from R 95 to R 85. On average the 30-day standard prepaid 1GB data bundle currently costs R 83.50, based on the prices for this data bundle across the four MNO's.

Figure 4: Data Price changes for 2GB standard 30-day prepaid data bundles



Source: ICASA Database Based on Tariff Notifications

Figure 4 above shows the price adjustments that occurred on the 30-day standard prepaid 2GB data bundles in the 2020/21 FY Q4 to 2021/22 FY Q4 period. On 29 March 2021, Vodacom reintroduced its 2GB data bundle which was reported in the 2021/22 FY Q2 Bi-annual Tariff Analysis Report¹⁰ at the price of R 159. The operator reduced the price of the 2GB data bundle in the period under review by R 10 or 6.3% to R 149. MTN reduced the price of its 2GB data bundle by R 40 or 21.2%, from R 189 to R 149, therefore with an in-bundle rate of R 0.07 per MB. Cell C also reduced its 2GB data bundle by R 50 or 25.1%, from R 199 to R 149 (i.e., R 0.05 per MB in-bundle rate). Telkom Mobile's 1GB data bundle remains the lowest among the four operators, price data bundle at R 139. On average, the 30-day standard prepaid 2GB data bundles currently cost R 147.

Table 4 below shows a summary of the salient changes that the Authority has observed for the 30-day standard prepaid data bundles over a period of a year

¹⁰ Page 20, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/tariffs-analysis-report-01-jan-to-30-jun-2021> > Accessed 01 March 2022.

i.e., between the 2020/21 FY Q4 Bi-annual Tariff Analysis Report and the 2021/22 FY Q4 Bi-annual Tariff Analysis Report.

Table 4: 2020/21 FY Q4 to 2021/22 FY Q4 (i.e., Y-o-Y) Salient Changes to 30-day Standard Prepaid Data Bundles

Licensee	2020/21 FY Q4 Bi-annual Tariff Analysis Report	2021/22 FY (Current ¹¹ Q4 Bi-annual Tariff Analysis Report)	Changes since 2020/21 FY Q4 Bi-annual Tariff Analysis Report ¹²
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.
	2GB data bundle price at R 159, with an in-bundle rate to R 0.08 per MB.	Reduced the price of 2GB data bundle to R 149, which lowered the in-bundle rate to R 0.07 per MB.	Priced at 6.3% less → 6.3% 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 2 399, 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 58.4% less → 58.4% 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.
	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.
Telkom Mobile	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.
	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	Priced at 20.2% less → 20.2% lower in-bundle rate.

¹¹ Q4 (quarter 4) is as per the review period for the production and publication of this report, so changes are as of 31 December 2021 and not aligned to the financial year end of Q4 which is 31 March 2022.

¹² 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 10 January 2022.

		the in-bundle rate to R 0.08 per MB.	
Cell C	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.
	1GB data bundle price at R 95, with an in-bundle rate to R 0.09 per MB.	Reduced the price of 1GB bundle to R 85, which lowered the in-bundle rate to R 0.08 per MB.	Priced at 10.5% less → 10.5% lower in-bundle rate.
	1.5GB data bundle price at R 149, with an in-bundle rate to R 0.10 per MB.	Reduced the price of 1.5GB data bundle to R 99, which lowered the in-bundle rate to R 0.06 per MB.	Priced at 33.6% less → 33.6% lower in-bundle rate.
	2GB data bundle price at R 199, with an in-bundle rate to R 0.10 per MB.	Reduced the price of 2GB data bundle to R 149, which lowered the in-bundle rate to R 0.07 per MB.	Priced at 25.1% less → 25.1% lower in-bundle rate.
	3GB data bundle price at R 249, with an in-bundle rate of R 0.08 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 20.1% less → 20.1% lower in-bundle rate.
	10GB data bundle priced at R 499, with an in-bundle rate of R 0.05 per MB.	Reduced the price of 10GB data bundle to R 469, with an in-bundle rate of R 0.05 per MB.	Priced at 6% less → 6% lower in-bundle rate.
	20GB data bundle priced at R 799, with an in-bundle rate of R 0.04 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 25% less → 25% lower in-bundle rate.

Source: ICASA Database based on Tariff Notifications

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

2.1.1.1.3.1. MTN Prepaid Personalised Data Bundles

The Authority received four notifications regarding MTN Prepaid Personalised Data Bundles in the period under review on 01 July 2021, 06 July 2021, 20 July 2021, and 26 July 2021. The operator added new daily, weekly and monthly prepaid data bundles in the plan as per the notifications filed on 01 July 2021 and 06 July 2021. The notification received on 20 July 2021 entailed an amendment of the monthly Prepaid Personalised Data Bundles. MTN further amended the monthly data bundles on 26 July 2021, wherein it included Night Express data bundles on selected data bundles. Table 5 shows a sample¹³ of the additional data bundles, and table 6 shows a sample of the amended monthly data bundles. MTN's preceding notification with respect to this plan was filed with the Authority on 30 April 2021.

¹³ 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 10 January 2022.

Table 5: Additional MTN Prepaid Personalised Data Bundles

Validity	Inclusive Value			Price (Incl. VAT)	In-bundle Rates (Rand per MB)		
	Effort 1	Effort 2	Effort 3		Inclusive value effort 1	Inclusive value effort 2	Inclusive value effort 3
01 July 2021 Notification							
Daily	12MB	15MB	50MB	R 2	R 0.17	R 0.13	R 0.04
	100MB	120MB	180MB	R 8	R 0.08	R 0.07	R 0.04
	400MB	450MB	1024MB	R 20	R 0.05	R 0.04	R 0.02
	1280MB	1500MB	2560MB	R 29	R 0.02	R 0.02	R 0.01
	8192MB	15000MB	25600MB	R 100	R 0.01	R 0.01	R 0.00
Weekly	60MB	75MB	200MB	R 10	R 0.17	R 0.13	R 0.05
	200MB	220MB	400MB	R 20	R 0.10	R 0.09	R 0.05
	450MB	500MB	900MB	R 40	R 0.09	R 0.08	R 0.04
	1280MB	1536MB	2560MB	R 70	R 0.05	R 0.05	R 0.03
	5120MB	6144MB	10240MB	R 180	R 0.04	R 0.03	R 0.02
Monthly (As amended on 20 July 2021)	25600MB	30720MB	51200MB	R 600	R 0.02	R 0.02	R 0.01
	60MB	70MB	125MB	R 10	R 0.17	R 0.14	R 0.08
	100MB	150MB	200MB	R 15	R 0.15	R 0.10	R 0.08
	250MB	300MB	500MB	R 29	R 0.12	R 0.10	R 0.06
	500MB	700MB	1100MB	R 60	R 0.12	R 0.09	R 0.05
	1280MB	1700MB	2560MB	R 85	R 0.07	R 0.05	R 0.03
	2300MB	3072MB	4608MB	R 149	R 0.06	R 0.05	R 0.03
	6400MB	8533MB	12800MB	R 299	R 0.05	R 0.04	R 0.02
12800MB	17067MB	25600MB	R 469	R 0.04	R 0.03	R 0.02	
128000MB	170667MB	256000MB	R 999	R 0.01	R 0.01	R 0.00	
06 July 2021 Notification							
Validity		Inclusive Value		Price (Incl. VAT)		In-bundle Rate (Rand per MB)	
Daily		1024MB		R 10		R 0.01	
				R 19		R 0.02	
				R 25		R 0.02	
Weekly		1024MB		R 39		R 0.04	

Source: ICASA Database based on Tariff Notifications

The bundles shown in the table above are offered to selected customers at varying data volumes in accordance to their spending profiles. For example, MTN may offer selected customers a weekly 200MB, 220MB or 400MB data bundle, depending on their spend profiles, for a price of R 20. Customers benefit from the low in-bundle rates attached to the Personalised Data Bundles, with the highest being R 0.17 per MB, therefore customers receive more value for money.

Table 6: Amendment to MTN Prepaid Monthly Personalised Data Bundles

Validity	Inclusive Value						Price (Incl. VAT)	In-bundle Rates (Rand per MB)		
	Effort 1	Effort 1 Night Express Allocation	Effort 2	Effort 2 Night Express Allocation	Effort 3	Effort 3 Night Express Allocation		Inclusive value effort 1	Inclusive value effort 2	Inclusive value effort 3
Monthly (As amended on 26 July 2021)	60MB	0MB	80MB	0MB	125MB	0MB	R 10	R 0.17	R 0.13	R 0.08
	100MB	0MB	120MB	0MB	200MB	0MB	R 15	R 0.15	R 0.13	R 0.08
	250MB	0MB	300MB	0MB	500MB	0MB	R 29	R 0.12	R 0.10	R 0.06
	500MB	0MB	700MB	0MB	950MB	0MB	R 55	R 0.11	R 0.08	R 0.06

	1280MB	0MB	1536MB	0MB	2560MB	0MB	R 85	R 0.07	R 0.06	R 0.03
	2048MB	2048MB	2560MB	2560MB	4096MB	4096MB	R 120	R 0.03	R 0.02	R 0.01
	5120MB	5120MB	7168MB	7168MB	10240MB	10240MB	R 280	R 0.03	R 0.02	R 0.01
	10240MB	10240MB	13312MB	13312MB	20480MB	20480MB	R 450	R 0.02	R 0.02	R 0.01
	133120MB	133120MB	184320MB	184320MB	256000MB	256000MB	R 999	R 0.00	R 0.00	R 0.00

Source: ICASA Database based on Tariff Notifications

Table 6 above shows that selected data bundles include Night Express data allocation. For example, customers that are offered the 2048MB data bundle (effort 1) receive an additional 2048MB to use between 00h00 to 05h00.

MTN's additional Personalised Data Bundles filed on 01 July 2021 were introduced in the market on 12 July 2021, while those filed on 06 July 2021 were introduced in the market on 15 July 2021. MTN's Personalised Data Bundles amendment filed on 26 July 2021 came to effect 04 August 2021.

2.1.1.1.3.2. Vodacom Pay Once Data Bundles

Vodacom's amendment to its Pay Once Data Bundles was filed with the Authority on 13 July 2021. The previous notification regarding the Pay Once Data Bundles was filed on 15 July 2020. The amendment entailed the price reduction of the packages offered. The plan offers customers data bundles that are paid for on a once-off basis and then allocated to customers monthly for a period of six or twelve months as shown in table 7 below.

Table 7: Amendment to Vodacom's Pay Once Data Bundles

Monthly Bundle Size	Total Months of Allocation	Total Allocated Data	Previous Price Paid Upfront (Incl. VAT)	Current Price Paid Upfront (Incl. VAT)	Price Difference	Variance (%)
100MB	6 months	600MB	R 119	R 79	-R 40	-33.6%
250MB		1500MB	R 219	R 149	-R 70	-32%
500MB		3000MB	R 339	R 279	-R 60	-17.7%
1GB	12 months	12288MB	R 899	R 599	-R 300	-33.4%
2GB		24756MB	R 1 399	R 999	-R 400	-28.6%
5GB		61440MB	R 3 499	R 1 999	-R 1 500	-42.9%
10GB		122880MB	R 5 999	R 2 499	-R 3 500	-58.3%

Source: ICASA Database based on Tariff Notifications

The table above shows that the 10GB package had the largest tariff decrease in both absolute and percentage terms, decreasing by R 3 500 or 58.3%, from R 5 999 to R 2 499. Vodacom's Pay Once Data Bundles can be compared to Cell

C's Upfront Payment Bundles (filed with the Authority on 11 November 2020). For example, Vodacom offers 1GB Pay Once Data Bundle at R 599, while Cell C offers its 1GB Upfront Payment Bundle at R 799, which is R 200 or 33.4% more than what Vodacom charges. However, it should be noted that Cell C rewards customers with a free additional monthly recurring data bundle equivalent to the standard data allocation. Vodacom's amendment to its Pay Once Data Bundles came to effect on 22 July 2021.

2.1.1.1.3.3. Vodacom Time Based Bundles

Vodacom filed its new Time Based Bundles with the Authority on 15 July 2021, wherein it offers prepaid and hybrid customers data bundles of varying validity periods that can be used on specific time intervals (time zones) as shown in table 8 below.

Table 8: Vodacom Time Based Bundles

Data Volume (MB)	4-Hour Window (08h00 to 12h00)					
	1 Day	3 Days	5 Days	7 Days	14 Days	30 Days
500	R 11	R 12	R 13	R 15	R 18	R 28
1024	R 14	R 15	R 18	R 20	R 24	R 38
2048	R 22	R 24	R 28	R 31	R 37	R 60
3072	R 34	R 36	R 42	R 47	R 57	R 91
5120	R 57	R 60	R 72	R 80	R 96	R 155
10240	R 77	R 81	R 96	R 108	R 130	R 208
20480	R 116	R 121	R 145	R 162	R 194	R 312
30720	R 162	R 170	R 203	R 227	R 273	R 438
51200	R 256	R 269	R 320	R 358	R 430	R 691
100240	R 478	R 502	R 597	R 669	R 803	R 1 290
4-Hour Window (12h00 to 16h00)						
500	R 11	R 12	R 13	R 15	R 18	R 28
1024	R 14	R 15	R 18	R 20	R 24	R 38
2048	R 22	R 24	R 28	R 31	R 37	R 60
3072	R 34	R 36	R 42	R 47	R 57	R 91
5120	R 57	R 60	R 72	R 80	R 96	R 155
10240	R 77	R 81	R 96	R 108	R 130	R 208
20480	R 116	R 121	R 145	R 162	R 194	R 312
30720	R 162	R 170	R 203	R 227	R 273	R 438
51200	R 256	R 269	R 320	R 358	R 430	R 691
102400	R 478	R 502	R 597	R 669	R 803	R 1 290
4-Hour Window (20h00 to 00h00)						
500	R 11	R 12	R 13	R 15	R 18	R 28
1024	R 14	R 15	R 18	R 20	R 24	R 38
2048	R 22	R 24	R 28	R 31	R 37	R 60
3072	R 34	R 36	R 42	R 47	R 57	R 91
5120	R 57	R 60	R 72	R 80	R 96	R 155
10240	R 77	R 81	R 96	R 108	R 130	R 208
20480	R 116	R 121	R 145	R 162	R 194	R 312

30720	R 162	R 170	R 203	R 227	R 273	R 438
51200	R 256	R 269	R 320	R 358	R 430	R 691
102400	R 478	R 502	R 597	R 669	R 803	R 1 290
8-Hour Window (09h00 to 17h00)						
500	R 12	R 12	R 15	R 16	R 19	R 31
1024	R 16	R 16	R 19	R 22	R 26	R 41
2048	R 24	R 25	R 30	R 34	R 40	R 65
3072	R 37	R 39	R 46	R 51	R 61	R 99
5120	R 62	R 65	R 77	R 86	R 104	R 166
10240	R 83	R 87	R 104	R 116	R 139	R 224
20480	R 124	R 131	R 155	R 174	R 209	R 335
30720	R 175	R 183	R 218	R 244	R 293	R 470
51200	R 275	R 288	R 343	R 384	R 461	R 741
102400	R 513	R 538	R 641	R 717	R 861	R 1 383

Source: ICASA Database based on Tariff Notifications

The table above shows that customers can purchase a 1GB data bundle valid for 30 days to use during the 8-hour window (i.e., 09h00 to 17h00), at a price of R 41. It should be noted that unused/remaining data is utilised on the following days of the bundle's validity period until it is depleted. Customers can choose data bundles in accordance with their needs for digital services at specific times, especially when they are away from fixed broadband services. Customers can purchase the Time Based Bundles via the *123*4# USSD or the my Vodacom App. Vodacom introduced its Time Based Bundles in the market on 24 July 2021.

2.1.1.1.3.4. Cell C WhatsApp Data Bundle

On 23 July 2021 Cell C filed an amendment to the WhatsApp Data Bundle with the Authority. The amendment entailed a reduction of the validity of the Cell C WhatsApp Data Bundle from 7 days to 3 days which negatively impacted customers as they have a shorter period to utilise the data bundle.

The amendment of Cell C's WhatsApp Data Bundle became effective on 04 August 2021.

2.1.1.1.3.5. FNB Connect Bundle

Cell C¹⁴ filed an amendment of the FNB Connect Bundle with the Authority on 20 August 2021. The amendment entailed the price increase of FNB Connect Bundle 1GB data bundles, which is set out in table 9 below.

Table 9: FNB Connect Bundle

Description	Validity	Previous Price	Current Price	Price Difference	Variance (%)
1GB	1 Day	R 39	R 49	R 10	26%
1GB	7 Days	R 53	R 55	R 2	4%

Source: ICASA Database Based on Tariff Notifications

The table above shows that there were price adjustments on FNB Connect's Bundles, for the 1-day and 7-day 1GB data bundles which were increased by 26% and 4% respectively, and this means that the cost to communicate also increased for customers who purchase these bundles. The FNB Connect Bundle 1GB 7-day data bundle prices are competitive when compared to those charged by the big four MNOs, for instance Cell C offers its 7-day 1GB data bundle for R 65 which is 18.2% more than what FNB Connect charges. Vodacom's 7-day 1GB data bundle is priced at R 80, which is 45.5% more than FNB Connect's price for the same data bundle volume. MTN's 7-day 1GB data bundle is priced at R 70, which is 27.3% more than FNB Connect's price for the same data bundle volume. Telkom's 7-day 1GB data bundle is priced at R 75, which is 36.4% more than FNB Connect's price for the same data bundle volume. The amendment of the FNB Connect Bundle became effective on 10 October 2021.

2.1.1.1.3.6. Vodacom Weekly Data Bundles

Vodacom's amendment of its Data Bundle portfolio was filed with the Authority on 22 September 2021, and it entailed the adjustment of the pricing of selected

¹⁴ Cell C opens its mobile network infrastructure to MVNOs to offer their own products and services. The MVNOs which utilise Cell C's mobile network infrastructure are FNB, MRP Mobile, Smart Mobile, Me & You Mobile, The Unlimited and Shoprite K'nect Mobile, to name a few. Tariff notifications for these MVNOs are filed by Cell C on their behalf.

monthly¹⁵ and weekly data bundles and the introduction of new data bundles. Table 10 below shows the amendment to the weekly data bundles.

Table 10: Amendment to Vodacom's Data Bundles

Allocation	Previous Price	Price (Incl. VAT)	In-bundle Rate (Tariff per MB)	Price Difference	Variance (%)
Weekly Data Bundles					
100MB	R 17	Discontinued			
120MB	N/A	R 17	R 0.14	N/A	N/A
250MB	R 35	R 29	R 0.12	-R 6	-17.1%
500MB	R 60	R 49	R 0.10	-R 11	-18.3%
1GB	R 80	R 69	R 0.07	-R 11	-13.8%
2GB	R 120	R 99	R 0.05	-R 21	-17.5%
5GB	N/A	R 199	R 0.04	N/A	N/A

Source: ICASA Database Based on Tariff Notifications

On the weekly data bundles, the largest tariff decrease (in absolute value terms) occurred on the 2GB data bundle, reducing by R 21 (or 17.5%), from R 120 to R 99. Vodacom's weekly data bundle can be compared to other operators' 1GB data bundles. For example, Cell C's weekly 1GB bundle is priced at R 65, which is R 4 or 5.8% less than what Vodacom charges. MTN and Telkom Mobile's weekly 1GB bundles are priced at R 70 and R 75, which is R 1 (or 1.4%) and R 6 (or 8.7%) more than Vodacom's 1GB weekly data bundle, respectively.

Vodacom's data amendment came to effect on 01 October 2021.

2.1.1.1.3.7. Cell C 30-Day Data Bundles

Cell C filed an amendment of its 30-day Data Bundles with the Authority on 29 September 2021. The Cell C 30-day Data Bundles consist of 30-day Base bundles and WhatsApp Boost 30-day Bundles. The amendment entailed the introduction of new 30-day Base data bundles and WhatsApp Boost 30-day data bundle packages and price reductions on certain 30-day Base data bundle packages. Table 11 below details the new bundle packages and the price reductions which occurred on the Cell C 30-day Data Bundles.

¹⁵ The analysis of monthly data bundles can be found on 2.1.1.1.1. above.

Table 11: Cell C 30-day Data Bundles

30-day Base Bundles					WhatsApp Boost 30-day Bundles	
Bundle	Previous Price	Current Price	Price Difference	Variance (%)	Bundle	Price
40MB	R 10	N/A	N/A	N/A	40MB	R 4
100MB	R 15	R 15	N/A	N/A	80MB	R 5
200MB	N/A	R 29	N/A	N/A	150MB	R 8
250MB	R 35	N/A	N/A	N/A	250MB	R 12
350MB	N/A	R 45	N/A	N/A	325MB	R 15
500MB	N/A	R 65	N/A	N/A	325MB	R 15
1GB	R 95	R 85	-R 10	-10.5%	800MB	R 25
1.5GB	R 149	R 99	-R 50	-33.6%	800MB	R 25
2GB	R 199	R 149	-R 50	-25.1%	800MB	R 25
3GB	R 249	R 199	-R 50	-20.1%	800MB	R 25
4GB	N/A	R 249	N/A	N/A	800MB	R 25
6GB	R 299	N/A	N/A	N/A	800MB	R 25
10GB	R 499	R 469	-R 30	-6%	N/A	N/A
20GB	R 799	R 599	-R 200	-25%	N/A	N/A
30GB	R 899	R 699	-R 200	-22.2%	N/A	N/A

Source: ICASA Database Based on Tariff Notifications

The largest price reduction on the Cell C 30-day Base bundles in percentage terms of 33.6% occurred on the 1.5GB bundle. The 1GB 30-day Base Bundle can be compared to Vodacom and MTN's 30-day 1GB bundles which are also priced at R 85. Telkom's 1GB 30-day bundle priced at R 79 is the cheapest among the MNOs. The amendment of the Cell C 30-day Data Bundles became effective on 08 October 2021.

2.1.1.1.3.8. Vodacom Prepaid Monthly Recurring Bundles

Vodacom filed an amendment to its Prepaid Monthly Recurring Bundles with the Authority on 20 October 2021, wherein it upsized data bundle allocations and reduced prices of selected data bundles. The preceding notification regarding Prepaid Monthly Recurring Bundles was filed on 16 April 2021. Table 12 below details the amendment.

Table 12: Amendment to Vodacom's Prepaid Monthly Recurring Bundles

Previous Data Allocation	Current Data Allocation	Previous Price (Incl. VAT)	Current Price (Incl. VAT)	Price and/or data volume Difference	Price and/or data volume allocation Variance (%)	In-bundle Rate (Rand per MB)
5GB	7.2GB	R 349	R 349	2.2GB	43.9%	R 0.05
20GB	36GB	R 699	R 699	16GB	80%	R 0.02
50GB	50GB	R 1 499	R 799	-R 700	-46.7%	R 0.02

100GB	100GB	R 2 399	R 999	-R 1 400	-58.4%	R 0.01
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Source: ICASA Database based on Tariff Notifications

As shown in the table above, the 5GB data bundle for example, was upsized by 2.2GB while the price remained unchanged at R 349. This translates to a decrease in the in-bundle rate from R 0.07 per MB to R 0.05 per MB. The operator also decreased the prices of the 50GB and 100GB data bundles. For example, the 100GB bundle had a R 1 400 or 58.4% price decrease from R 2 399 to R 999. Vodacom's amendment to its Prepaid Monthly Recurring Bundles came to effect on 29 October 2021.

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

This section generally provides an updated comparative analysis 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. In the period under review, the Authority did not receive any notification regarding the daily¹⁶ mobile data bundles, therefore the update on this section is only with respect to the weekly standard prepaid data bundles.

2.1.1.2.1. Weekly Data Bundles

In the period under review, Vodacom filed weekly data bundles as analysed in 2.1.1.1.2.7. These new prices are compared in this sub-section to the prevailing prices of other MNOs as per their previous filings of standard prepaid weekly data bundles.

Previous notifications for standard weekly 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

¹⁶ The latest tariffs indicating the standard daily prepaid data bundles can be found on the 2021/22 FY Q2 Bi-annual Tariff Analysis Report: Pages 42 – 45, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/tariffs-analysis-report-01-jan-to-30-jun-2021> > Accessed 16 January 2022.

filed on 24 October 2018 and the most recent amendment was filed on 16 February 2021.

Table 13 below compares weekly data bundles offered by Cell C, MTN, Telkom Mobile, Vodacom and FNB Connect, while table 14 shows the in-bundle rates of the weekly bundles which are on table 13.

Table 13: Prices for Standard Weekly Data Bundles

Data Volume	Operators' Prices				
	Cell C	MTN	Telkom Mobile	Vodacom	FNB Connect
Weekly Data Bundles					
50MB	R 10 (60MB)	R 10	R 5	N/A	R 9
100MB	R 14 (140MB)	R 15	R 15	R 17 (120MB)	R 15
250MB	R 25	R 25 (200MB)	R 30	R 29	R 25
500MB	R 45	R 55	R 50	R 49	R 35
1GB	R 65	R 70	R 75	R 69	R 55
2GB	R 95	R 99	R 100	R 99	R 99
5GB	N/A	N/A	N/A	R 199	-

Source: ICASA Database based on Tariff Notifications

Table 14: In-bundle Rates for the Standard Weekly Data Bundles

Data Volume	Operators' In-bundle Rates				
	Cell C	MTN	Telkom Mobile	Vodacom	FNB Connect
Weekly Data Bundles					
50MB	R 0.18 (60MB)	R 0.20	R 0.10	-	R 0.18
100MB	R 0.15 (140MB)	R 0.15	R 0.15	R 0.14 (120MB)	R 0.15
250MB	R 0.10	R 0.13 (200MB)	R 0.12	R 0.12	R 0.10
500MB	R 0.08	R 0.11	R 0.10	R 0.10	R 0.07
1GB	R 0.07	R 0.07	R 0.07	R 0.07	R 0.05
2GB	R 0.04	R 0.05	R 0.05	R 0.05	R 0.05
5GB	N/A	N/A	N/A	R 0.04	N/A

Source: ICASA Database based on Tariff Notifications

Vodacom's replacement of the 100MB with 120MB data bundle while keeping the price unchanged at R 17, which has made this MNO offer more value for money than the other operators on the 100MB to 150MB range of weekly data bundles.

The operator has the lowest in-bundle rate of R 0.14, which is R 0.01 per MB lower when compared to the other operators, shown in table 14 above.

On the 200MB to 250MB range of weekly data bundles, Cell C and FNB Connect offer the most affordable 250MB data bundles, both at R 25 with in-bundle rates of R 0.10 per MB. Vodacom and Telkom Mobile offer their 250MB data bundles for R 29 and R 30, respectively, with both in-bundle rates at R 0.12 per MB. MTN's 200MB priced at R 25 which translates to the highest in-bundle rate at R 0.13 per MB, in the 200MB to 250MB range of weekly data bundles, as shown in table 14 above.

FNB Connect charges the least for the 500MB weekly data bundle, offering it for R 35 which translates to the lowest in-bundle rate of R 0.07 per MB. Cell C has the second lowest in-bundle rate of R 0.08 per MB, although it is offering a 600MB data bundle at R 50. MTN offers the least affordable 500MB data bundle at R 55, which translates to the highest in-bundle rate of R 0.11 per MB. Vodacom and Telkom Mobile offer their 500MB weekly data bundle for R 49 and R 50, respectively, which translates to a R 0.10 per MB in-bundle rate.

On the weekly 1GB bundle FNB Connect currently offers the lowest price of R 55 among the tabulated operators, with the in-bundle rate of R 0.05 per MB. Cell C, Vodacom, MTN and Telkom Mobile's weekly 1GB bundles are priced at R 65, R 69, R 70, and R 75, which is R 10 (or 18.2%), R 14 (or 25.5%), R 15 (or 27.3%) and R 20 (or 36.4%) more than FNB Connect's 1GB weekly data bundle, respectively.

Vodacom's reduction of its weekly 2GB data bundle from R 120 to R 99 has resulted in Telkom Mobile's 2GB being priced the highest among the tabulated operators, offering its bundle for R 1 more than Vodacom, MTN and FNB Connect. Cell C charges the most affordable price of R 95 for the standard weekly 2GB data bundle, when compared to the tabulated operators.

Vodacom is currently the only operator offering a weekly 5GB data bundle which is priced at R 199 (i.e., R 0.04 per MB in-bundle rate).

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 connected¹⁷. 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.

2.1.2.1. Cell C Daily WhatsApp Bundle

Cell C filed its Daily WhatsApp Bundle with the Authority on 22 July 2021. The Cell C Daily WhatsApp Bundle offers customers a 100MB daily bundle that is valid until midnight from the day of purchase. Table 15 below sets out the details of the Cell C Daily WhatsApp Bundle.

Table 15: Cell C Daily WhatsApp Bundle

WhatsApp Anytime Data	Validity	Price
100MB	Until Midnight on date of purchase	R 4

Source: ICASA Database Based on Tariff Notifications

The Cell C Daily WhatsApp Bundle was launched on 03 August 2021.

2.1.2.2. Vodacom VodaBucks GSM Store

Vodacom filed its amendment to the VodaBucks GSM Store plan on 02 September 2021 wherein it added new VodaBucks data bundles. The operator's preceding filing regarding the VodaBucks GSM Store plan was filed with the Authority on 20 May 2021. The plan offers prepaid customers (including hybrid and post-paid customers) standard data, URL-specific data and/or voice bundles that can be

¹⁷ 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.

purchased using airtime, VodaBucks, debit card, or a combination money/airtime and VodaBucks. Table 16 shows the additional VodaBucks Store Data Bundles.

Table 16: Vodacom's VodaBucks GSM Store

Offer Description	Bundle Price
100MB Video Ticket data for 7 days	R 2 + VodaBucks
100MB Social Ticket data for 7 days	R 2 + VodaBucks
75MB for today	R 6 + VodaBucks
100MB for today	R 8 + VodaBucks
250MB Video Ticket data for 7 days	R 5 + VodaBucks
250MB Social Ticket data for 7 days	R 5 + VodaBucks
500MB for today	R 12 + VodaBucks
500MB Video Ticket data for 7 days	R 9 + VodaBucks
500MB Social Ticket data for 7 days	R 9 + VodaBucks
1GB Video Ticket data for 7 days	R 17 + VodaBucks
1GB Social Ticket data for 7 days	R 17 + VodaBucks
50MB + 50MB Free for today	R 4 + VodaBucks
200MB + 50MB Free for today	R 9 + VodaBucks
100MB for the next 60 mins	VodaBucks Only
200MB for the next 60 mins	R 1.50 + VodaBucks
Facebook 100MB data for 1day	VodaBucks Only
Facebook 250MB data for 1day	VodaBucks Only
Facebook 50MB data for 1day	VodaBucks Only
500MB + 500MB Free for today	R 10 + VodaBucks
1GB for today	R 15 + VodaBucks

Source: ICASA Database based on Tariff Notifications

As shown in the table above, customers can for example, purchase a 7-day 1GB Video Ticket data bundle as a combination of VodaBucks earned and R 17 monetary value. This allows customers to benefit from their loyalty through discounted purchases. Vodacom's VodaBucks GSM Store bundles were filed in terms of the ICT COVID-19 National Disaster Regulations and therefore came to effect on 11 September 2021.

2.1.2.3. MTN Prepaid Social Bundles

MTN filed the amendment to its Prepaid Social Bundles with the Authority on 26 October 2021. The amendment entailed the addition of new data bundles, the upsizing of selected data packages and the adjustment of prices. Table 17 below details the amendment.

Table 17: MTN Prepaid Social Bundles

Social bundle	Previous Volume	Current Volume	Previous Price	Current Price	In-bundle Rate (Rand per MB)
WhatsApp Bundles					
Daily	50MB	50MB	R 2	R 2	R 0.04
	N/A	250MB	N/A	R 5	R 0.02
	N/A	1024MB	N/A	R 10	R 0.01
3 Days	100MB	150MB	R 5	R 5	R 0.03
	N/A	1024MB	N/A	R 12	R 0.01
Weekly	250MB	300MB	R 10	R 10	R 0.03
	N/A	1024MB	N/A	R 20	R 0.02
20 Days	1024MB	1024MB	R 30	R 30	R 0.03
30 Days	N/A	1024MB	N/A	R 35	R 0.03
	1536MB	2048MB	R 50	R 50	R 0.02
	N/A	5120MB	N/A	R 99	R 0.02
URL-specific Bundles (Facebook, Twitter, YouTube, TikTok)					
Daily	100MB	200MB	R 5	R 5	R 0.03
	N/A	500MB	N/A	R 10	R 0.02
Weekly	N/A	300MB	N/A	R 10	R 0.03
	500MB	1024MB	R 20	R 20	R 0.02
30 Days	1024MB	1024MB	R 50	R 35	R 0.03
	N/A	2048MB	N/A	R 50	R 0.02
	N/A	5120MB	N/A	R 99	R 0.02

Source: ICASA Database based on Tariff Notifications

The above shows that MTN introduced the 1GB WhatsApp bundles with 1-day, 3-day, 7-day and 30-day validity periods. MTN also increased allocated data on selected data bundles while keeping the prices unchanged. For example, the 30-day URL-specific 500MB data bundle was upsized by 500MB to 1GB while the price remained unchanged at R 20, resulting in the decrease in the in-bundle rate from R 0.04 per MB to R 0.02 per MB. Customers also benefit from the low in-bundle rates attached to the Prepaid Social Bundles ranging from R 0.01 to R 0.04 per MB.

MTN's Social Bundles can be compared to Vodacom Ticket bundles. For example, Vodacom offers its 3-day 100MB WhatsApp Bundle for R 6 which translates to a R 0.06 per MB in-bundle rate, while MTN offers its 3-day 150MB WhatsApp bundle for R 5 which translates to a R 0.03 per MB in-bundle rate, therefore MTN offers customers more value for money. On the other hand, both operators offer their monthly 1GB WhatsApp bundles for R 35, while Cell C offers its monthly 1GB

WhatsApp bundle for R 29, which is R 6 or 17.1% less than what Vodacom and MTN charge for the same data volume.

MTN's amendment to its Prepaid Social Bundles came to effect on 05 November 2021.

2.1.2.4. Vodacom Open View Data Bundles

The Authority received Vodacom's Open View Data Bundles on 04 November 2021. The bundles are offered as once-off 30-day data bundles and are available for purchase to Open View customers with a prepaid SIM card provisioned for the ETV price plan. Table 18 shows the Open View Data Bundles.

Table 18: Vodacom Open View Data Bundles

Data Allocation	Night Owl	Price (Incl. VAT)	In-bundle Rate (Rand per MB)
1GB	1GB	R 49	R 0.02
2GB	2GB	R 99	R 0.02
5GB	5GB	R 199	R 0.02
10GB	10GB	R 299	R 0.01
20GB	20GB	R 399	R 0.01

Source: ICASA Database based on Tariff Notifications

As shown in the table above Vodacom offers Open View customers data bundles that are inclusive of standard data and Night Owl data. For example, the 2GB data bundle package includes 2GB of standard data and 2GB of Night Owl data, thus resulting in the in-bundle rate of R 0.02 per MB. It should be noted that if customers opt for out-of-bundle billing they will be charged an OOB rate of R 0.49 per MB. Vodacom introduced its Open View Data Bundles on 13 November 2021.

2.1.2.5. Vodacom Just 4 You WhatsApp Ticket Bundles

The Authority received Vodacom's notification on the Just 4 You WhatsApp Ticket Bundles on 09 November 2021. The bundles comprise of WhatsApp data bundles and on-net voice minutes. These are available to prepaid customers on a once-off basis. Table 19 below details the bundles.

Table 19: Vodacom Just 4 You WhatsApp Ticket Bundles

Allocation	Price (Incl. VAT)	Validity
200MB WhatsApp Data + 30 VC Minutes	R 10	7 days
200MB WhatsApp Data + 60 VC Minutes	R 14	7 days
200MB WhatsApp Data + 120 VC Minutes	R 17	7 days
1GB WhatsApp Data + 60 VC Minutes	R 15	1 day
50MB WhatsApp Data + 60 VC Minutes	R 9	1 day

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the new bundles have a 1-day or a 7-day validity. For example, at a price of R 17 customers can get a 7-day 200MB WhatsApp data and 120 Vodacom (i.e., on-net) minutes. Vodacom introduced its Just 4 You WhatsApp Ticket Bundles in the market on 18 November 2021.

2.1.2.6. MTN Personalised Social Bundle Offers

MTN filed its additional Personalised Social Bundles with the Authority on 15 November 2021. The operator added new 1-day, 3-day, 7-day and 30-day standard data bundles and 1-day to 3-day WhatsApp bundles. The bundle(s) offered to the customers are based on their location (different towns or suburbs in South Africa) and spending profiles. Table 20 below shows a sample of the additional Personalised Social Bundles. More information regarding this offer and its terms and conditions can be obtained from the operator's website¹⁸.

Table 20: MTN's Additional Personalised Social Bundles

Personalised MTN PAYG Social Bundle	Validity	Inclusive value effort 1	Inclusive value effort 2	Inclusive value effort 3	Price (Incl. VAT)	In-bundle rate (effort 1)	In-bundle rate (effort 2)	In-bundle rate (effort 3)
MTN Personalised PAYG Social- 25MB or 30MB or 50MB -Daily	Daily	25MB	30MB	50MB	R 1	R 0.04	R 0.03	R 0.02
MTN Personalised PAYG Social- 300MB or 350MB or 600MB -3 Days	3 Days	90MB	100MB	180MB	R 5	R 0.06	R 0.05	R 0.03
MTN Personalised PAYG Social- 60MB or 70MB	Weekly	60MB	70MB	120MB	R 3	R 0.05	R 0.04	R 0.03

¹⁸ Available online at: < <https://www.mtn.co.za/pages/termsandconditions.aspx> > Accessed on 14 January 2022.

or 120MB - Weekly								
MTN Personalised PAYG Social- 2176MB or 2560MB or 4608MB - Monthly	Monthly	2176MB	2560MB	4608MB	R 45	R 0.02	R 0.02	R 0.01
Personalised MTN PAYG Social Bundles (WhatsApp Bundles)								
MTN Personalised PAYG Social- 25MB or 30MB or 50MB -Daily	Daily	25MB	30MB	50MB	R 1	R 0.04	R 0.03	R 0.02
MTN Personalised PAYG Social- 180MB or 200MB or 400MB -3 Days	3 Days	180MB	200MB	400MB	R 5	R 0.03	R 0.03	R 0.01

Source: ICASA Database based on Tariff Notifications

Table 20 above shows that for a monetary value of R 3, customers can be offered weekly Personalised PAYG Social Bundles with datavolumes of 60MB, 70MB or 120MB.

MTN's Personalised Social Bundles were filed in terms of the ICT COVID-19 National Disaster Regulations and therefore they came to effect on 22 November 2021.

2.1.2.7. Cell C MediaPlay Subscription Charges and MediaPlay Data Bundles

Cell C filed its MediaPlay Subscription Charges and MediaPlay Data Bundles with the Authority on 16 November 2021. These offer customers MediaPlay Bundles ranging from 250MB to 3GB and are priced between R 15 and R 130 providing access to a streaming video, audio and content service via a web-based browser across compatible end-user devices connected to the Internet. Table 21 below details the bundles and prices available on the Cell C MediaPlay Subscription Charges and MediaPlay Data Bundles.

Table 21: Cell C MediaPlay Subscription Charges and MediaPlay Data Bundles

Package	Validity	Price
250MB Top Up MediaPlay Data Bundle	All day and night	R 15
500MB MediaPlay Data Bundle	All day and night	R 25

500MB Top Up MediaPlay Data Bundle	All day and night	R 25
1GB MediaPlay Data Bundle	All day and night	R 49
1GB Top Up MediaPlay Data Bundle	All day and night	R 49
1.5GB MediaPlay Data Bundle	All day and night	R 70
2GB MediaPlay Data Bundle	All day and night	R 90
3GB MediaPlay Data Bundle	All day and night	R 130

Source: ICASA Database Based on Tariff Notifications

The Cell C MediaPlay Subscription Charges and MediaPlay Data Bundles were launched in the market on 01 December 2021.

2.1.2.8. MTN Social Bundles - Instagram Bundles

MTN filed additional Social Bundles with the Authority on 25 November 2021. The operator introduced new Instagram bundles in its Social Bundles suite. It is worth noting that MTN initially filed its Social Bundles with the Authority on 22 November 2017. Table 22 below shows the new Instagram bundles.

Table 22: MTN Social Bundles - Instagram Bundles

Instagram Bundles	Validity	Price (Incl. VAT)	In-bundle rate (tariff per MB)
Instagram Bundles-Daily-200MB	Daily	R 5	R 0.03
Instagram Bundles -Daily-500MB	Daily	R 10	R 0.02
Instagram Bundles -Weekly-300MB	Weekly	R 10	R 0.03
Instagram Bundles -Weekly-1GB	Weekly	R 20	R 0.02
Instagram Bundles -Weekly-2GB	Weekly	R 30	R 0.01
Instagram Bundles - Monthly-1GB	Monthly	R 35	R 0.03
Instagram Bundles - Monthly-2GB	Monthly	R 50	R 0.02
Instagram Bundles - Monthly-5GB	Monthly	R 99	R 0.02

Source: ICASA Database based on Tariff Notifications

The in-bundle rates, as shown in the table above, range from R 0.01 – R 0.03 per MB. Customers can either purchase daily, weekly and/or monthly Instagram bundles. It should be noted that these bundles deplete when used on both Instagram and Facebook platforms due to Facebook's system design which enables Instagram traffic to run on the same system. MTN's additional Social Bundles came to effect on 06 December 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 31 March 2022) 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 ceased to exist in the market before or after 31 December 2021.

2.2.1. MTN Hourly 1GB Promotion

MTN filed its Hourly 1GB Promotion with the Authority on 19 July 2021, wherein it offers 1GB hourly data bundle at the price of R 1. MTN aims to assist with reducing the impact of the pandemic on telecommunications services and lower costs to communicate by providing financial relief and affordable access to digital services. Customers can only purchase the hourly 1GB on the MTN App and MoMo App.

MTN's Hourly 1GB Promotion was filed in terms of the ICT COVID-19 National Disaster Regulations, 2020, and therefore came to effect on 22 July 2021 and will be in the market until further notice.

2.2.2. MTN Bundle Bonanza Inflow Promotions

MTN filed an amendment to its Bundle Bonanza Inflow Promotions with the Authority on 26 July 2021, wherein it revised the terms and conditions of the promotions.

Previously, the promotion was applicable to each qualifying recharge for 9 months from the date of SIM activation. MTN has amended the promotional offer to limit the qualifying recharges to three. The promotional data now depletes at 200kbps while the promotional voice bundles deplete at 1.25 per minute increments. For example, the 60 minutes voice bundle depletes at 1.25 minutes per minute,

resulting in the total number of minutes of the call to be 48 minutes (60 minutes/1.25 minutes). More information regarding the Bundle Bonanza Inflow Promotions can be found on the 2019/20 FY Q4 Bi-annual Tariff Analysis Report¹⁹ and the 2020/21 FY Q2 Bi-annual Tariff Analysis Report²⁰, which are available on the Authority's website. MTN's amendment came to effect on 05 August 2021.

2.2.3. MyMTN App Migration Incentive

The Authority received the MyMTN App Migration Incentive promotion on 19 August 2021. The promotion rewards customers who upgrade to the new MyMTN App, or download the new MyMTN App, with a free 1GB data bundle valid for 1 day. The promotional offer was launched in the market on 31 August 2021 and was anticipated to be in the market until 31 December 2021. However, on 07 December 2021, MTN amended the validity of the 1GB data bundle to 1 hour and extended the promotional offer to be in the market until 31 April 2022.

2.2.4. Cell C Retention Promotion

Cell C filed its Retention Promotion with the Authority on 29 October 2021. The Cell C Retention Promotion entails data rewards ranging from 500MB to 1GB for customers who recharge for amounts ranging from R 10 to R 35. Table 23 below sets out the details of the Cell C Retention Promotion.

Table 23: Cell C Retention Promotion

Reward offer	Price	Validity
500MB	R 10	2 days
500MB	R 15	2 days
500MB	R 35	2 days
Specifically for Retention of Customers		
500MB	R 0	Valid until midnight on day of allocation
1GB	R 0	Valid until midnight on day of allocation

Source: ICASA Database Based on Tariff Notifications

¹⁹ Pages 47 – 49, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jul-29-dec-2019> > Accessed 14 January 2022.

²⁰ Pages 58 – 60, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020> > Accessed 14 January 2022

The Cell C Retention Promotion was launched on 01 November 2021 and will be available on the market until 30 April 2022.

2.2.4.1.1.1. MTN Bozza Bundles

MTN filed its Prepaid Bozza Bundles with the Authority on 08 November 2021. These are bundles offered to customers as part of MTN's summer campaign. The operator offers standard data, social and voice bundles, which are available through MTN MoMo, MTN Stores and selected MTN direct sales agents. Table 24 details MTN's Prepaid Bozza Bundles.

Table 24: MTN Bozza Bundles

Bundle Type	Validity	Inclusive Value	Price	In-bundle Rate (Rand per MB)/Effective Rate (Rand per minute)
Bozza Gigs Data 2GB Anytime Data + 2GB Night Express	14 days	2GB+2GB	R 49	R 0.01
Bozza Gigs Data 5GB Anytime Data + 5GB Night Express	30 days	5GB+5GB	R 99	R 0.01
Bozza Gigs Data 7.5GB Anytime Data + 7.5GB Night Express	30 days	7.5GB+7.5GB	R 129	R 0.01
Bozza Gigs Data 10GB Anytime Data + 10GB Night Express	30 days	10GB+10GB	R 149	R 0.01
Bozza Social 300MB WhatsApp	7 days	300MB	R 10	R 0.03
Bozza Social 1.5GB WhatsApp	30 days	1.5GB	R 30	R 0.02
Bozza Data Daily 1GB	1 day	1GB	R 19	R 0.02
Bozza Data Weekly 1GB	7 days	1GB	R 30	R 0.03
Bozza Data Monthly 1GB	30 days	1GB	R 79	R 0.08
7.5 GB (New Bundle)	30 days	250MB x30 days	R 79	R 0.01
Bozza Voice 40 All-net Mins	7 days	40 minutes	R 15	R 0.38
Bozza voice 120 All-net Mins	7 days	120 minutes	R 30	R 0.25

Source: ICASA Database based on Tariff Notifications

The table above shows that the in-bundle rates of promotional bundles range from R 0.01 to R 0.08 per MB, while the effective rates range from R 0.38 to R 0.25 per minute, therefore rewarding customers with value for money. For example, MTN's 30-day standard prepaid 2GB data bundle is priced R 149, while for the same monetary value, customers could receive a 30-day 10GB data bundle (with 10GB Night Express) on MTN's Prepaid Bozza Bundles plan. The Prepaid Bozza Bundles were introduced on the market on 17 November 2021.

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 MTN, Telkom Mobile and Cell C's 30-day standard prepaid data bundles. 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 update²¹ of the regulatory interventions which are underway to address data costs.

2.3.1. The ICT COVID-19 National Disaster Regulations

In the period under review, the Authority published the ICT COVID-19 National Disaster Sixth Amendment Regulations²² on 31 August 2021 and the ICT COVID-19 National State of Disaster Regulations, 2021²³ on 11 November 2021. The former amendment Regulations extended the temporary radio frequency spectrum licences issued to certain Individual Electronic Communications Network Service ("IECNS") and Individual Electronic Communications Services ("IECS") licensees in April 2020 to 30 November 2021. However, the ICT COVID-19 National State of Disaster Regulations, 2021 did not extend the temporary radio frequency spectrum licences issued in April 2020 and such licences terminated on 30 November 2021.

²¹ These regulatory interventions were previously discussed in past Bi-annual Tariff Analysis report, with previous update is available in the 2021/22 FY Q2 Bi-annual Tariff Analysis Report which is available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/tariffs-analysis-report-01-jan-to-30-jun-2021> >

²² The amendment culminated into the ICT COVID-19 National Disaster Sixth Amendment Regulations, 2021, Government Gazette 45069. Available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/ict-covid-19-national-disaster-sixth-amendment-regulations> > Accessed on 18 January 2022.

²³ The current Regulations, 2021, Government Gazette 45458. Available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/ict-covid-19-national-disaster-seventh-amendment-regulations> > Accessed on 18 January 2022.

As such, licensees were required to apply for the assignment of provisional radio frequency spectrum licence by no later than 16h00 on 17 November 2021. The licences are valid from 01 December 2021 until 30 June 2022 or until three months after the termination of the National State of Disaster. The licensees were required to pay pro-rated radio frequency spectrum licence fees, in terms of the Radio Frequency Spectrum Licence Fees Regulations, 2010, for the period commencing on 01 December 2021 to 30 June 2022.

A licensee assigned with provisional spectrum in terms of the ICT COVID-19 National State of Disaster Regulations, 2021 must maintain network connectivity in line with regulatory requirements for the schools allocated respectively to it by the Authority, free of charge, for a period of 12 months from the date determined by the Authority.

2.3.2. Licensing processes for the International Mobile Telecommunications (IMT) spectrum and the WOAN

The Authority published an Invitation to Apply (ITA)²⁴ on 10 December 2021, with a closing date of 31 January 2022, and six applications have been received from Cell C, MTN, Liquid Telecoms, Rain Networks, Telkom and Vodacom. The Authority concluded the IMT spectrum auction on 17 March 2022.

In terms of the Wireless Open Access Network ("WOAN"), the Authority published a notice²⁵ on 19 November 2021, of its decision on the publication of a consultation document in respect of the amended composite ITA for an I-ECNS licence and Radio Frequency Spectrum (RFS) Licence for the purpose of operating a WOAN. The Authority reviewed and suspended the timelines relating to the licensing of the WOAN following the ITA for the IMT spectrum licensing process. This will give the Authority an opportunity to interrogate the impact of the outcomes of the consultation on the licensing of the WOAN.

²⁴ Government Gazette No. 45628, Notice 717 of 2021

²⁵ Government Gazette No. 45509, Notice 677 of 2021

The WOAN Licensing process was put on hold until the completion of the spectrum auction, during this time the Authority has been engaging other National Regulatory Authorities who have implemented a similar WOAN model in order to ensure that lessons and best practices can be learnt and where necessary adopted from other jurisdictions around the world, to ensure sustainability of the WOAN model.

On 11 March 2022, the Minister of Communications and Digital Technologies published the proposed amendment of policy on the high demand spectrum and policy direction on the licensing of a WOAN to remove the requirement to license a WOAN, for public comment.²⁶

2.3.3. Market Inquiry into the Mobile Broadband Services Markets

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

This Inquiry was conducted in terms of section 4B of the ICASA Act read with section 67(4) of the ECA with the aim 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. The Authority completed the Inquiry process with the publication of the Findings Document on Mobile Broadband Services Markets in March 2021.²⁷

The Authority held public hearings on the draft Mobile Broadband Services Regulations on 12 August and 13 August 2021.

²⁶ Government Gazette 46031. Available on: <
https://www.gov.za/sites/default/files/gcis_document/202203/46031gon1853_0.pdf > Accessed on 28 March 2022.

²⁷ Findings Document on Mobile Broadband Services Inquiry published by Government Gazette No. 44337 dated 26 March 2021.

Interested stakeholders, namely, Vodacom, MTN, Cell C, Telkom, Internet Services Providers Association (ISPA), Falcon & Hume (on behalf of an anonymous licensee), the Free Market Foundation and the ICT SMME Chamber (except the SACF), who submitted written representations on the draft Regulations participated in the public hearings. The next process in this process is the finalisation of the final Regulations.

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. The Authority received two standard prepaid voice tariff notifications from Cell C. The operator amended its UltraBonus and MegaBonus prepaid tariff plans, which are discussed in the next sub-section.

2.4.1. Flat-rate tariffs

This sub-section provides an analysis of flat-rate tariff plans filed with the Authority in the period under review. Flat-rate tariff plans charge the same retail rate for calls to any network. There are no on-net and off-net price differentials on these plans. The Authority received two notifications in the period under review, wherein Cell C amended its UltraBonus and MegaBonus prepaid tariff plans, both on 25 August 2021, these are discussed in the next subsections.

2.4.1.1. Cell C MegaBonus Tariff Plan

Cell C filed an amendment of the MegaBonus Tariff Plan with the Authority on 25 August 2021. The amendment entailed a price increase of the MegaBonus OOB voice rate. Table 25 below sets out the price increase of the OOB voice rate on the Cell C MegaBonus Tariff Plan.

Table 25: Cell C MegaBonus Tariff Plan

Description	Previous rate	Current rate	Tariff Difference	Variance (%)
OOB Voice Call Rate (per minute)	R 1.72	R 2.50	R 0.78	45.3%

Source: ICASA Database Based on Tariff Notifications

The flat-rate of the MegaBonus tariff plan was increased by R 0.78 or 45.3% from R 1.72 to R 2.50 per minute. The amendment of the Cell C MegaBonus Tariff Plan became effective on 03 September 2021.

2.4.1.2. Cell C UltraBonus Tariff Plan

Cell C filed an amendment of the UltraBonus Tariff Plan with the Authority on 25 August 2021. The amendment entailed the price increase of UltraBonus OOB voice rate. Table 26 below sets out the price increase of the OOB voice rates on the Cell C UltraBonus Tariff Plan.

Table 26: Cell C UltraBonus Tariff Plan

Description	Current rate	New rate	Difference	Variance (%)
Voice Call Rate	R 2	R 2.50	R 0.50	25%

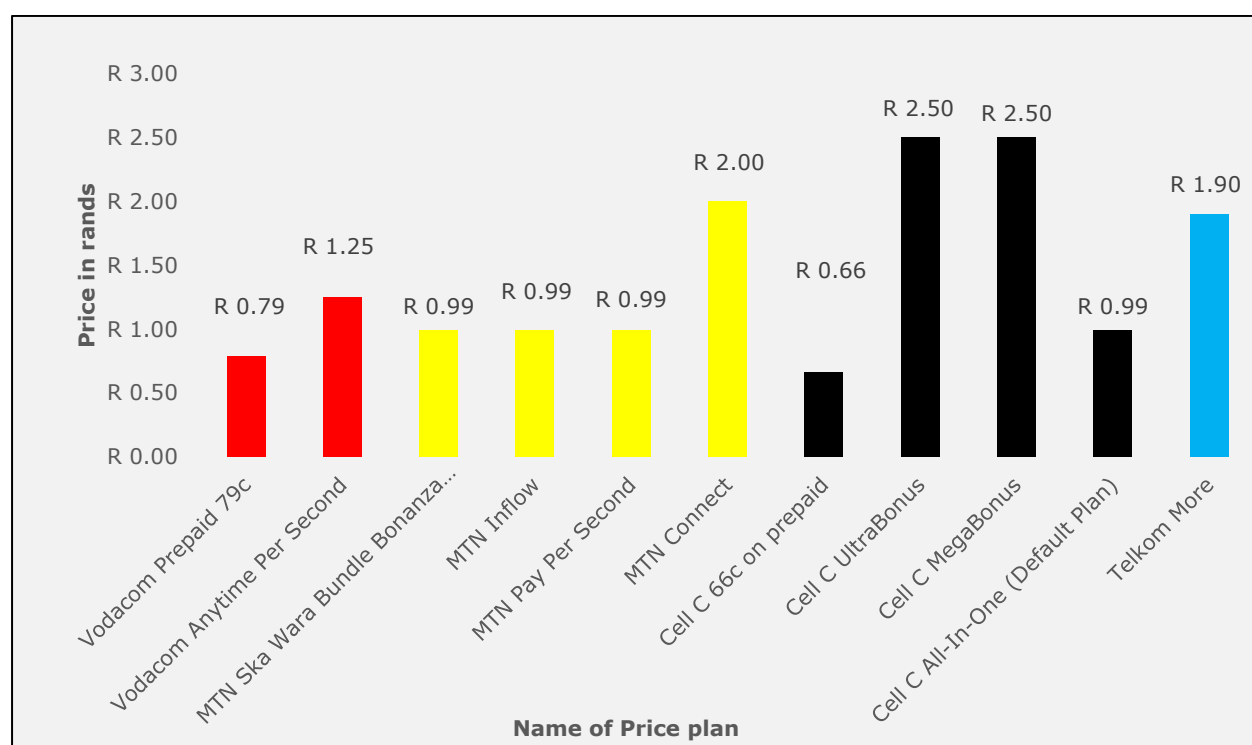
Source: ICASA Database based on Tariff Notifications

The flat-rate applicable to the UltraBonus tariff plan was increased by R 0.50 or 25% from R 2 to R 2.50 per minute. The amendment of the Cell C UltraBonus Tariff Plan became effective on 03 September 2021.

2.4.1.3. Flat-rate tariffs offered by MNOs

This sub-section depicts the various flat-rates voice tariff plans offered by the MNOs and provides a brief comparative analysis of the rates. As already highlighted in sub-sections 2.4.1.1 and 2.4.1.2 the Authority received two notifications in the period under review, wherein Cell C amended its UltraBonus and MegaBonus prepaid flat-rate, a graphical illustration is done in Figure 5 below of these tariff plans in comparison to other flat-rates offered by other MNOs, namely Vodacom, MTN and Telkom Mobile.

Figure 5: Flat-rates per minute



Source: ICASA Database based on Tariff Notifications

The figure above shows that amended flat-rates charged by Cell C for its UltraBonus and MegaBonus flat-rate tariffs are the highest across all depicted flat-rate tariffs offered by itself and other MNOs, with them priced at R 1.84 or 287.8% more (approximately 4 times higher) than the lowest flat-rate, namely, the Cell C 66c on Prepaid.

2.4.2. Analysis of standard voice bundles billed per minute

2.4.2.1. MTN R1 On-net Voice Bundle

MTN filed its R 1 On-net Voice Bundle with the Authority on 01 July 2021, wherein it offers customers a once-off 3 minutes on-net voice bundle for R 1. Customers are therefore offered an effective rate of R 0.33 per minute. The bundle is valid until 23h59 from the time of purchase and OOB rates apply thereafter. For example, customers on MTN's Inflow price plan save R 0.66 per minute when purchasing the voice bundle since the OOB voice rate is set at R 0.99 per minute. The operator introduced its R 1 On-net Voice Bundle on 12 July 2021.

2.4.2.2. Vodacom Daily Free Calls

Vodacom's amendment to its Daily Free Calls tariff plan was filed with the Authority on 11 August 2021, following a previous amendment, which was filed on 08 March 2019. The operator has enabled customers on the price plan to receive the Night Shift promotional benefit on condition that they recharge with R 12 or more. Vodacom free Night Shift promotional bundle enables them to make free calls between 00h00 and 05h00. Vodacom's amendment came to effect on 20 August 2021.

2.4.2.3. Telkom Mobile All-Network Voice Bundles

Telkom Mobile's amendment to its All-Network Voice Bundles was filed with the Authority on 07 September 2021. The amendment entailed price reductions for certain all-net voice minute bundles. The largest price decrease in absolute value terms occurred on the 1000 minutes All-net voice bundle which decreased by R 105. Table 27 below sets out the price amendments on the Telkom Mobile All-Network Voice Bundles.

Table 27: Telkom Mobile All-Network Voice Bundles Amendment

Voice Bundles Once-off & Recurring on All-Networks				
Description	Previous Price	Current Price	Price Difference	Variance (%)
25 min All-net voice minutes	R 17.25	R 15	-R 2.25	-13%
50 min All-net voice minutes	R 34.50	R 30	-R 4.50	-13%
100 min All-net voice minutes	R 68	R 60	-R 8	-11.8%
200 min All-net voice minutes	R 135	R 100	-R 35	-26%
300 min All-net voice minutes	R 201	R 150	-R 51	-25%
500 min All-net voice minutes	R 302	R 250	-R 52	-17.2%
1000 min All-net voice minutes	R 504	R 400	-R 105	-20.8%

Source: ICASA Database Based on Tariff Notifications

The Telkom Mobile 25 minutes All-Net voice bundle priced at R 15 can be compared to the Cell C 25 minutes Any-net Prepaid voice bundle²⁸ which is also priced at R 15. The amendments on the Telkom All-Network Voice Bundles became effective on 20 September 2021.

²⁸ Page 54-55, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/tariffs-analysis-report-01-jan-to-30-jun-2021> > Accessed on 14 January 2022

2.4.2.4. Telkom FreeMe All-Network Voice Bundles

Telkom filed an amendment to its FreeMe All-Network Voice Bundles on 08 September 2021 which entails the addition of the 50 minutes voice bundle in the plan. Table 28 below shows the additional Telkom FreeMe All-Network Voice Bundle.

Table 28: Telkom FreeMe All-Network Voice Bundles

Bundle Name	Validity Period	Price	Effective Rate (Rand per Minute)
FreeMe All-Net Voice Bundle (50 Minutes)	31 Days	R 25	R 0.50

Source: ICASA Database Based on Tariff Notifications

It should be noted that the OOB voice rate of the FreeMe price plan is R 0.70 per minute for calls to other networks. Therefore, customers on the FreeMe price plan purchasing the 50-minute FreeMe All-Network Voice Bundle will save R 0.20 per minute when making calls to any network. Telkom Mobile's amendment of the FreeMe All-Network Voice Bundle came into effect on 20 September 2021.

2.4.2.5. MTN CVM Waya-waya Voice Bundles

MTN filed its new Bozza Talk Bundles with the Authority on 29 September 2021 bearing the name "Waya-waya voice bundles". However, on 06 October 2021, the operator amended the name to "Bozza Talk Bundles". These are personalised on-net voice bundles with daily and weekly validity periods. The voice bundles are available to selected prepaid customers based on their locations in different towns in the country. Table 29 below shows the bundles.

Table 29: MTN CVM Waya-waya Voice Bundles

MTN Personalised Bozza Talk Bundles	Validity	Inclusive Value (On-net)	Price (Incl. VAT)	Effective Rate (Rand per minute)
Personalised Waya waya voice bundle -Daily 400min on-net	24 hrs	400 minutes	R 5	R 0.01
			R 10	R 0.03
			R 15	R 0.04
			R 20	R 0.05
			R 25	R 0.06
	R 30	R 0.08		
Personalised Waya waya voice bundle -Daily 1440min on-net		1440 minutes	R 50	R 0.02
Personalised Waya waya voice bundle -Weekly 2800min on-net	7-day	2800 minutes	R 15	R 0.01
			R 20	R 0.01
			R 30	R 0.01

			R 50	R 0.02
			R 70	R 0.03
Personalised Waya waya voice bundle -Weekly 10080min on-net		10 080 minutes	R 100	R 0.01
			R 150	R 0.01

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the effective rates of the personalised Bozza Talk Bundles range from R 0.01 to R 0.08 per minute. It should be noted that the bundle value will roll over to a maximum of two times the inclusive value and the excess minutes will be forfeited.

MTN's Bozza Talk Bundles were introduced in the market on 08 October 2021.

2.4.2.6. MTN Dynamic USSD All-net Voice Offers

The Authority received MTN's Dynamic USSD All-net Voice Offers on 05 October 2021. The plan entails voice bundles offered to a selected prepaid customers via the *142# USSD code, based on their spend profiles and locations in the country. Table 30 shows a sample of the voice offers. More information regarding this offer and its terms and conditions can be obtained from the operator's website²⁹.

Table 30: MTN Dynamic USSD All-net Voice Offers

Dynamic USSD All-Net voice bundles	Validity	Inclusive value (On-net minutes)	Profile											
			1	2	3	4	5	6	7	8	9	10	11	12
Daily R3	24 hours	5 All-Net min	R 2	R 3	R 3	R 3	R 3	N/A						
Daily R5		10 All-Net min	R 3	R 5	R 5	R 5	R 5	N/A						
Daily R10		20 All-Net min	R 5	R 7	R 8	R 10	R 10	N/A						
Daily R12		30 All-Net min	R 7	R 10	R 10	R 12	R 12	N/A						
Daily R20		60 All-Net min	R 10	R 12	R 12	R 15	R 20	N/A						
Weekly R10	7 days	15 All-net min	R 7	R 10	R 10	R 10	R 10	R 10	R 10	R 10	R 10	N/A		
Weekly R20		40 All-net min	R 13	R 15	R 20	R 20	R 20	R 20	R 20	R 20	R 20	N/A		
Weekly R30		70 All-net min	R 19	R 22	R 25	R 30	R 30	R 30	R 30	R 30	R 30	N/A		
Weekly R40		120 All-net min	R 29	R 29	R 29	R 35	R 40	R 40	R 40	R 40	R 40	N/A		
Weekly R50		160 All-net min	R 35	R 39	R 39	R 39	R 45	R 50	R 50	R 50	R 50	N/A		
Weekly R100		350 All-net min	R 60	R 70	R 70	R 70	R 79	R 79	R 79	R 100	R 100	N/A		

²⁹ Available online at: < <https://www.mtn.co.za/pages/termsandconditions.aspx> > Accessed on 15 January 2022

Weekly R150		600 All-net min	R 99	R 99	R 99	R 99	R 99	R 99	R 99	R 129	R 150	N/A		
Monthly R20		30 All-net min	R 12	R 15	R 15	R 18	R 20	R 20	R 20	R 20	R 20	N/A		
Monthly R50		120 All-net min	R 39	R 39	R 39	R 39	R 39	R 45	R 50	R 50	R 50	R 50	R 50	R 50
Monthly R80		200 All-net min	R 49	R 49	R 49	R 49	R 49	R 49	R 69	R 80	R 80	R 80	R 80	R 80
Monthly R100	30 days	250 All-net min	R 60	R 60	R 60	R 60	R 60	R 79	R 79	R 100	R 100	R 100	R 100	R 100
Monthly R150		400 All-net min	R 90	R 90	R 90	R 90	R 90	R 99	R 99	R 129	R 129	R 150	R 150	R 150
Monthly R200		600 All-net min	R 129	R 129	R 129	R 129	R 129	R 149	R 149	R 149	R 149	R 179	R 200	R 200
Monthly R250		900 All-net min	R 199	R 199	R 199	R 199	R 199	R 199	R 199	R 199	R 199	R 199	R 229	R 250

Source: ICASA Database based on Tariff Notifications

Table above shows that the Daily 5 All-net minutes offered at R 3 has the highest effective rate of R 0.60 per minute. Therefore, customers on the MTN Inflow price plan, for example, can save at least R 0.39 per minute on calls when purchasing the USSD All-net Voice Offers as opposed to using OOB rates which charges a flat rate of R 0.99 per minute. MTN introduced the Dynamic USSD All-net Voice Offers in the market on 15 October 2021.

2.4.2.7. MTN Prepaid Personalised Bozza Talk Bundles

MTN filed its Prepaid Personalised Bozza Talk Bundles with the Authority on 08 November 2021. On 23 December 2021, MTN filed additional on-net Bozza Talk Bundles. These are voice bundle offered to customers based on their spend profiles. The operator offers personalised daily and weekly on-net voice bundles as shown in table 31 below.

Table 31: MTN Prepaid Personalised Bozza Talk Bundles

Validity	Inclusive Value	Price (Incl. VAT)	Effective Rate (Rand per Minute)
08 November 2021 Notification			
Weekly	40 all-net minutes	R 15	R 0.38
	120 all-net minutes	R 30	R 0.25
23 December 2021 Notification			
Daily	300 on-net minutes	R 10	R 0.03
	300 on-net minutes	R 15	R 0.05
	300 on-net minutes	R 20	R 0.07
	300 on-net minutes	R 25	R 0.08
	300 on-net minutes	R 30	R 0.10
	720 on-net minutes	R 50	R 0.07
Weekly	2100 on-net minutes	R 15	R 0.01
	2100 on-net minutes	R 20	R 0.01
	2100 on-net minutes	R 30	R 0.01
	2100 on-net minutes	R 50	R 0.02

	2100 on-net minutes	R 70	R 0.03
	5040 on-net minutes	R 100	R 0.02
	5040 on-net minutes	R 150	R 0.03

Source: ICASA Database based on Tariff Notifications

As shown in the table above the highest effective rate on the Bozza Talk Bundles is R 0.38 per minute. Therefore, customers on the MTN Ska Wara Bundle Bonanza price plan, for example, can save at least R 0.61 per minute on calls when purchasing Bozza Talk Bundles as opposed to using OOB rates which charges a flat-rate of R 0.99 per minute.

The MTN Bozza Bundles which were filed on 08 November 2021 were introduced in the market on 17 November 2021, while the additional bundles filed on 23 December 2021 came into effect on 05 January 2022.

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 and promotional 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 amendments of the All-in-One Prepaid Tariff Plan with the Authority on 25 August and 03 November 2021. Cell C initially filed the 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 Report³⁰. The amendments to the Cell C Prepaid Tariff Plan entailed a reduction of the validity period from 7 days to 3 days and data allocation of certain bundles, the increase of the maximum recharge value by

³⁰ Page 45-46, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020> > Accessed on 14 January 2022

R 0.99 for all bundles and an increase of voice call rates. Table 32 below sets out the price increase of out of bundle voice call rates on the Cell C All-in-One Prepaid Tariff Plan.

Table 32: Cell C All-in-One Tariff Plan

25 August 2021						
Description	Previous rate	Current rate	Price Difference		Variance (%)	
Voice Call Rate	R 0.99	R 1.50	R 0.51		51.5%	
03 November 2021						
Recharge Value (Rands)		Recharge Bonus				
Minimum	Maximum	Previous Data	Current Data	On-net Voice	Previous Validity	Current Validity
5	14.99	30MB	30MB	30 minutes	7 days	3 days
15	34.99	120MB	120MB	300 minutes	7 days	3 days
35	49.99	300MB	300MB	600 minutes	7 days	3 days
50	149.99	1GB	1GB	900 minutes	7 days	7 days
150	399.99	2GB	2GB	900 minutes	7 days	7 days
400	699.99	5GB	2GB	1000 minutes	15 days	7 days
700	999.99	10GB	2GB	1000 minutes	15 days	7 days
1000+		20GB	2GB	1000 minutes	15 days	7 days

Source: ICASA Database Based on Tariff Notifications

The amendment of the Cell C All-in-One Prepaid Tariff Plan became effective on 03 September 2021.

2.5.1.2. Vodacom VodaPay Bundles

Vodacom filed its VodaPay Bundles with the Authority on 29 September 2021. The bundles are available to prepaid, post-paid and hybrid customers. The bundles comprise of On-net voice bundles, Integrated bundles and Everyday-ta bundles as shown in table 33 below.

Table 33: Vodacom VodaPay Bundles

Description	Validity in days	Bundle size	Price (Incl. VAT)
On-net Voice			
single purchase voice recurring On-net	30	60min every day	R 199
single purchase voice recurring any network	30	60min every day	R 299
Integrated Bundles			
60 min Power Hour +1GB WhatsApp	7	60min + 1GB daily for 7 days	R 49
300MB data + 600MB WhatsApp + 60 min On-net	7	300MB + 600MB + 60min for 7 days	R 25
1GB data + 1GB WhatsApp + 1GB Night Owl +60 min On-net	30	1GB + 1GB + 1GB + 60min for 30 days	R 99
Everyday-ta			

Single purchase data recurring	3	1G every day for 3 days	R 49
	7	1GB everyday for 7 days	R 99
	30	250MB every day for 30 days	R 99
	30	500MB everyday for 30 days	R 169
	30	1GB everyday for 30 days	R 299

Source: ICASA Database based on Tariff Notifications

Customers can purchase the bundles on the VodaPay App. It is worth noting that MTN offers its 1GB Everyday Gigs bundle for R 349 (filed on 03 May 2021), which is R 50 (or 16.7%) more than Vodacom's 1GB Everyday-ta bundle. Vodacom introduced its VodaPay Bundles in the market on 08 October 2021.

2.5.1.3. Cell C eMoyeni Prepaid Tariff Plan

On 10 September 2021 Cell C filed an amendment of eMoyeni's Data Bundles with the Authority. The amendment entailed price reductions and the introduction of new data, SMS and voice bundles. Table 34 and 35 below outlines the prices available on the Cell C eMoyeni Prepaid Tariff Plan and the price reductions on Cell C eMoyeni Prepaid Bundles.

Table 34: Cell C eMoyeni Prepaid Tariff Plan

Service	Price
Local Voice Calls (Any network and landlines)	R 1.30
Data (per MB)	R 0.28
Local SMS	R 0.32
International SMS	R 2.49

Source: ICASA Database Based on Tariff Notifications

Table 35: Cell C eMoyeni Prepaid Bundles

Data Bundles				
Description	Previous Price	Current Price	Price Difference	Variance (%)
30MB	R 5.22	R 6.96	R 1.74	33.3%
2GB	R 173.91	R 104.35	-R 69.56	-40%
Local SMS Bundles				
10 SMS	R 2.80	R 6.09	R 1.18	117.5%
50 SMS	R 14.00	R 24.35	R 0.74	73.9%
Local Voice Bundles				
10 Minutes	R 8.70	R 6.96	-R 1.74	-20%
35 Minutes	R 30.43	R 26.09	-R 4.34	-14.3%
100 Minutes	N/A	R 69.57	N/A	N/A

Source: ICASA Database Based on Tariff Notifications

The largest increase on the Cell C eMoyeni Prepaid Bundles in percentage terms of 117.5% occurred on the Local 10 SMS Bundles. The largest price reduction on the Cell C eMoyeni Prepaid Bundles in absolute and percentage terms is R 69.56 or 40% and it occurred in the 2GB data bundle. The Cell C eMoyeni Prepaid Tariff Plan can be compared to the Cell C Shoprite K’nect Mobile Prepaid Tariff Plan as in table 36 below.

Table 36: Cell C eMoyeni Prepaid Tariff Plan vs Shoprite K’nect Mobile Prepaid Tariff Plan

	Shoprite K’nect Mobile Prepaid Tariff Plan	Cell C eMoyeni Prepaid Tariff Plan
Data (per MB)	R 0.29	R 0.28
Local Voice Calls (Any network and landlines)	R 0.99	R 1.30
Local SMS	R 0.49	R 0.32
International SMS	R 1.99	R 2.49

Source: ICASA Database Based on Tariff Notifications

Cell C eMoyeni Prepaid Tariff Plan customers face lower (1% less) prices for data and Local SMS (1.2% less) than Shoprite K’nect Mobile Prepaid Tariff Plan customers. Customers on the Cell C eMoyeni Prepaid Tariff Plan are negatively affected by higher rates for voice calls and local SMSes compared to customers on the Cell C Shoprite K’nect Mobile Prepaid Tariff Plan.

The amendments of the Cell C eMoyeni Data Bundles became effective on 21 September 2021.

2.5.2. Promotional Prepaid Integrated Plans

2.5.2.1. Cell C All-in-One Bundle Double Data Promotion

Cell C filed amendments of its All-in-One Bundle Double Data Promotion on 21 July and 20 August 2021 with the Authority. The amendments entailed the reduction of the validity period of the All-in-One 300MB Bundle, the introduction a new integrated All-in-One 450MB Bundle priced at R 50 and the changing of bonus anytime data to be allocated only at night as bonus “Nite” data during the

promotion period. Table 37 below details the amendment of the All-in-One 300MB Bundle and the new 450MB Bundle.

Table 37: Cell C All-in-One Bundle Double Data Promotion

All-in-One 300MB Bundle	
Previous Validity	Current Validity
30 Days	14 Days
All-in-One 450MB Bundle	
Price	R 50
Validity	30 Days
Anytime Data	450MB
Bonus Anytime Data	450MB
On-net Minutes	700
Anytime Minutes	30

Source: ICASA Database Based on Tariff Notifications

The amendments of the Cell C All-in-One Bundle Double Data Promotion became effective on 01 and 27 August 2021.

2.5.2.2. Cell C Cell C CVM Bundles Promotion

Cell C's amendments to its CVM Bundles Promotion were filed with the Authority on 04 August, 21 September, 18 October, 09, 11, 12, 16 November and 09 December 2021, these entailed the addition of new CVM bundles to the current existing bundles and an extension of the promotion. Cell C initially filed the CVM Bundles with the Authority on 23 April 2021, analysed in the 2021/22 FY Q2 Bi-annual Tariff Analysis Report³¹. Table 38 below shows a sample of the additional CVM Bundles and their respective prices and validity periods.

Table 38: Cell C CVM Bundles Promotion

Additional CVM Bundles - 04 August 2021		
Bundle Description	Validity	Price
1.2GB	24 Hours	R 18
1.2GB	24 Hours	R 20
Additional CVM Bundles - 21 September 2021		
Bundle Description	Validity	Price
35Min + 90MB	1 Day	R 5
40Min + 120MB	1 Day	R 10

³¹ Page 61, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/tariffs-analysis-report-01-jan-to-30-jun-2021> > Accessed on 14 January 2022

100Min + 200MB	1 Day	R 15
150Min + 300MB	1 Day	R 20
230Min + 800MB	2 Days	R 29
150Min + 400MB	7 Days	R 20
230Min + 600MB	7 Days	R 29
230Min + 1GB	7 Days	R 35
630Min + 1GB	30 Days	R 49
Additional CVM Bundles - 09 November 2021		
100GB	24 Hours	R 0
1GB	3 Days	R 0
240MB + 310 Min	14 Days	R 15
600MB + 620 Min	14 Days	R 35
Additional CVM Bundles - 11 November 2021		
1GB + 30 on-net Min	7 Days	R 0
1GB + 30 on-net Min	3 Days	R 0
Additional CVM Bundles - 12 November 2021		
5MB	1 Hour	R 1
20MB	1 Hour	R 2.50
30MB	1 Hour	R 3
100MB	1 Hour	R 5
150MB	1 Hour	R 6.50
250MB	1 Hour	R 8
250MB	1 Hour	R 6.40
500MB	1 Hour	R 10
500MB	1 Hour	R 8
1GB	1 Hour	R 15
1GB	1 Hour	R 12
3GB	1 Hour	R 45
6GB	1 Hour	R 90
Additional CVM Bundles - 16 November 2021		
55GB + 45GB Nite	30 Days	R 500
200GB + 200GB Nite	90 Days	R 849
50 Any-net Min	1 Day	R 10
20 Any-net Min	20 Minutes	R 2
900 Any-net Min	30 Days	R 199
Additional CVM Bundles - 09 December 2021		
1.2GB	7 Days	R 25
1.5GB	7 Days	R 29
1.8GB	7 Days	R 35
2GB	7 Days	R 39
2.5GB	24 Hours	R 35
3GB	24 Hours	R 45
40 Any-net Minutes	24 Hours	R 8

Source: ICASA Database Based on Tariff Notifications

The additions to the Cell C CVM Bundles Promotion ranged from social media data, normal data, and voice bundles to the benefit of customers. On 18 October 2021 Cell C filed an amendment with the Authority extending the CVM Bundles promotional period from 30 October 2021 to 30 April 2022.

2.5.2.3. Telkom Mobile Varsity Vibe

Telkom Mobile filed the Varsity Vibe with the Authority on 19 November 2021. The Telkom Varsity Vibe offers university students across South Africa prepaid bundles ranging from 500MB to 2GB for a period of 6 months. Table 39 and 40 below

details the prepaid data bundles and integrated bundles, respectively, available on the Telkom Mobile Varsity Vibe.

Table 39: Telkom Mobile Varsity Vibe

Description	All-network data	Night-surfer data	Validity period	Price
Vibe 500MB	250MB	250MB	14 days	R 19
Vibe 1.2GB	600MB	600MB	14 days	R 29
Vibe 2GB	1GB	1GB	14 days	R 39

Source: ICASA Database Based on Tariff Notifications

Table 40: Telkom Varsity Vibe (Combos)

Description	All-network data	Social media data	Telkom-Telkom calls	Calls to other networks in SA	Validity period	Price
Varsity Combo 1	500MB	500MB	100 min	10 min	31 days	R 45
Varsity Combo 2	1GB	750MB	250 min	15 min	31 days	R 75
Varsity Combo 3	1GB	1GB	300 min	25 min	31 days	R 89
Varsity Combo 4	1.5GB	1.5GB	500 min	50 min	31 days	R 139

Source: ICASA Database Based on Tariff Notifications

The Telkom Varsity Vibe 2GB priced at R 39 can be compared to the MTN's Work From Home/Study Bundles 2GB priced at R 99, which is 153.8% more, however worth noting is that MTN's Home/Study bundles are valid for 30 days, which means customers are probably paying more due to the longer (16 days more) validity period. The Telkom Varsity Vibe was launched in the market on 01 December 2021, and it will be available for a period of 6 months.

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 July to 31 December 2021. The analysis of the tariff plans will consider month-to-month (MtM)³² plans applicable offered during the period under review.

³² 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.

2.6.1.MTN BozzaGigs 2GB + 2GB

On 08 July 2021, MTN added a new BozzaGigs 2GB + 2GB data bundle in its BozzaGigs LTE Price Plan that was initially filed on 16 April 2021 and analysed in the 2021/22 FY Q2 Bi-annual Tariff Analysis Report³³. The new BozzaGigs 2GB + 2GB entails 2GB standard data and 2GB Night Express data, valid for 14 days at a price of R 49. MTN introduced the bundle in the market on 20 July 2021.

2.6.2.Cell C Home Connecta-Flexi Promotion

Cell C filed an amendment to its Home Connecta-Flexi Promotion with the Authority on 05 August 2021. The amendment was in regard to the terms and conditions of the plan, wherein the period of the night (or “nite”, as referred by Cell C) data allocation of the plan was revised, and it was made available from 00:00 to 04:59:59 am, it was previously from 00:00 to 05:59:59 am.

The reduction of the night data period by an hour has a negative affect for customers as they now have less time to enjoy this night data benefit. The amendment of the Cell C Home Connecta-Flexi Promotion became effective on 18 August 2021.

2.6.3. Cell C Home Connecta

Cell C filed an amendment to its Home Connecta with the Authority on 05 August 2021. The amendment was in regard to the terms and conditions of the plan, wherein the period of the night (or “nite”, as referred by Cell C) data allocation of the plan was revised, and it was made available from 00:00 to 04:59:59 am, it was previously from 00:00 to 05:59:59 am.

The reduction of the night data period by an hour has a negative affect for customers as they now have less time to enjoy this night data benefit. The amendment became effective on 18 August 2021.

³³ Page 66, available on ICASA’s website: < <https://www.icasa.org.za/legislation-and-regulations/tariffs-analysis-report-01-jan-to-30-jun-2021> > Accessed on 16 January 2022

2.6.4. Rain Unlimited Home 5G Basic Amendment

Rain filed an amendment of its Unlimited Home 5G Basic with the Authority on 26 August 2021. The amendment entailed a price reduction and line speed upgrade of the Rain Unlimited Home 5G Basic. Table 41 below details the amended line speed and price for the Rain Unlimited Home 5G Basic.

Table 41: Rain Unlimited Home 5G Basic Amendment

Description	Previous Speed	Current Speed	Previous Price	Current Price	Price Difference	Variance (%)
Unlimited Home 5G Basic	15Mbps	25Mbps	R 599	R 499	-R 100	-16.7%

Source: ICASA Database Based on Tariff Notifications

The amendment of the Rain Unlimited Home 5G Basic became effective on 08 September 2021.

2.6.5. Cell C Connecta Unlimited Fixed LTE Plan (Month-to-Month)

Cell C filed the Connecta Unlimited Fixed LTE Plan with the Authority on 02 September 2021. The Cell C Connecta Unlimited Fixed LTE Plan offers customers unlimited anytime data through Cell C's LTE with no fall back to 2G/3G. Table 42 below sets out the details of the Cell C Connecta Unlimited Fixed LTE Plan.

Table 42: Cell C Connecta Unlimited Fixed LTE Plan

Package/Service	Line speeds	Price
Connecta Unlimited Fixed LTE Plan	10Mbps to 150Mbps	R 1 099

Source: ICASA Database Based on Tariff Notifications

The Cell C Connecta Unlimited Fixed LTE Plan was launched in the market on 01 October 2021.

2.6.6. MTN Home Uncapped F-LTE

MTN filed its MyMTN Home Uncapped FLTE price plan with the Authority on 14 September 2021, wherein it offers uncapped Fixed LTE (F-LTE) speed-based service to customers. The plan is offered on month-to-month (MtM) and 24-month

contractual periods. Table 43 below details the MyMTN Home Uncapped F-LTE plan.

Table 43: MyMTN Home Uncapped FLTE Price Plans

MyMTN Home Uncapped FLTE	Download speed	Fair use policy (FUP)	Sim only and month to month Price subscription (Incl. VAT)	24-month Price subscription (Incl. VAT) - Includes Router
MyMTN Home Uncapped FLTE 10Mbps	10Mbps	Uncapped Anytime Data 400GB FUP /Download Speed Rate Limit 2Mbps	R 499	R 599
MyMTN Home Uncapped FLTE 20Mbps	20Mbps	Uncapped Anytime Data 600GB FUP / Download Speed Rate Limit 4Mbps	R 699	R 799
MyMTN Home Uncapped FLTE 30Mbps	30Mbps	Uncapped Anytime Data 700GB FUP / Download Speed Rate Limit 4Mbps	R 799	R 899

Source: ICASA Database based on Tariff Notifications

It should be noted that the MtM contracts are SIM-only contracts, while the 24-month contracts are device inclusive. As shown in the table above, the packages are subject to a fair usage policy (FUP). For example, the speed on the MyMTN Home Uncapped FLTE 20Mbps package will be throttled to a maximum of 4Mbps when data usage exceeds 600GB at a given month.

MTN's price plan is more competitive when compared to Vodacom's Home Internet Service (filed on 30 August 2020). For example, MTN offers its MyMTN Home Uncapped FLTE 10Mbps for R 599, whereas Vodacom offers capped 200GB (100GB Anytime data + 100GB Night Owl data) for the same monetary value.

MTN's introduced its MyMTN Home Uncapped FLTE price plan in the market on 23 September 2021.

2.6.7. Telkom LTE Prepaid Data Bundles

Telkom Mobile's amendment to its LTE Prepaid Data Bundles was filed with the Authority on 21 September 2021 and entailed the introduction of the new 3GB + 3GB bundle and the increasing of the inclusive data on the 31-day 5GB + 5GB LTE Prepaid data to 7.5GB + 7.5GB. Table 44 below details the amendment of the Telkom LTE Prepaid Data Bundles.

Table 44: Telkom LTE Prepaid Data Bundles

LTE Prepaid	Anytime Data (31 Days)	Nite Surfer Data (31 Days)	Previous Price	Current Price
LTE Prepaid 3GB + 3GB	3GB	3GB	N/A	R 49
LTE Prepaid 7.5GB + 7.5GB	7.5GB	7.5GB	R 99	R 99

Source: ICASA Database Based on Tariff Notifications

Telkom LTE Prepaid 7.5GB + 7.5GB priced at R 99 can be compared to the MTN BozzaGigs 7.5GB Anytime Data + 7.5GB Night Express priced at R 129 or 30.3% more. Telkom Mobile's amendment of the Telkom LTE Prepaid Data Bundles became effective on 04 October 2021.

2.6.8. Ladysmith Wireless Solutions Air Fibre Internet

Ladysmith Wireless Solutions filed its Air Fibre Internet with the Authority on 04 October 2021. The Air Fibre Internet entailed four FTTH packages ranging from 10/5Mbps to 100/40Mbps. Table 45 below details the line speeds and prices available on the Ladysmith Wireless Solutions Air Fibre Internet.

Table 45: Ladysmith Wireless Solutions Air Fibre Internet

Package	Price
10/5Mbps	R 499
20/10Mbps	R 599
50/20Mbps	R 799
100/40Mbps	R 999

Source: ICASA Database Based on Tariff Notifications

Customers receive more value from the Ladysmith Wireless Solutions Air Fibre 10/5Mbps priced at R 499 compared to the Amobia Wireless Packages 10/2Mbps priced at R 865 or 73.3% more. The Ladysmith Wireless Solutions Air Fibre Internet was made available on the market on 14 October 2021.

2.6.9. Ibity Internet Wireless FTTH

Ibity Internet filed an amendment of its Wireless FTTH with the Authority on 21 October 2021. The amendment entailed line speed upgrades, price changes, the introduction of new packages and the termination of certain packages. Table 46 below details the amendments on Ibity Internet Wireless FTTH.

Table 46: Ibity Internet Wireless FTTH

Product Description	Previous Price	Current Price	Price Difference	Variance (%)
10Mbps	R 399	R 299	-R 100	-25.1%
20Mbps	R 799	R 399	-R 400	-50.1%
30Mbps	R 1 099	R 499	-R 600	-54.6%
40Mbps	R 1 699	R 599	-R 1 100	-64.7%
50Mbps	R 1 899	R 699	-R 1 200	-63.2%
Current Line Speed	New Line Speed	Price		
5Mbps	10Mbps	R 299		
15Mbps	30Mbps	R 499		

Source: ICASA Database Based on Tariff Notifications

The amendments on Ibity Internet Wireless FTTH plan became effective on 01 November 2021.

2.6.10. Vodacom Home Internet Uncapped Service

Vodacom's amendment to its Home Internet Uncapped Service was filed with the Authority on 11 November 2021, wherein the operator added new packages in the plan as shown in table 47 below. It is worth noting that Vodacom initially filed its Home Internet Service on 30 August 2019, bearing the name Vodacom Home Wi-Fi Service.

Table 47: Vodacom Home Internet Uncapped Service

24 Month Home Internet Uncapped Data Contracts					
Data Allocation	Speed	Fair Usage Policy - Data Allocation	Fair Usage Policy - Soft Cap Speed	Data Allocation Validity	Price (Incl. VAT)
Uncapped	up to 10Mbps	400GB	up to 2Mbps	1 calendar month	R 599
Uncapped	up to 20Mbps	600GB	up to 4Mbps		R 799
Uncapped	up to 30Mbps	700GB	up to 4Mbps		R 899
36 Month Home Internet Uncapped Data Contracts					
Uncapped	up to 10Mbps	400GB	up to 2Mbps	1 calendar month	R 499
Uncapped	up to 20Mbps	600GB	up to 4Mbps		R 699
Uncapped	up to 30Mbps	700GB	up to 4Mbps		R 799

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the packages are uncapped, however, they are subject to FUP, which means that they are throttled after exceeding the FUP threshold. For example, 10Mbps 400GB package offered for R 599 on a 24-month contract is throttled to Internet speeds up to 2Mbps after surpassing 400GB of data usage. Vodacom's Home Internet Uncapped Service can be compared to MTN's MyMTN Home Uncapped FLTE price plan. For example, both operators offer

their 10Mbps 400GB packages for R 599. However, MTN does offer a SIM-only month-to-month 10Mbps 400GB package for R 499.

Vodacom introduced the new Home Internet packages in the market on 22 November 2021.

2.6.11. MyMTN Home Uncapped 5G Price Plans

MTN's filed its MyMTN Home Uncapped 5G Price Plans with the Authority on 24 November 2021, wherein it offers SIM-only or device inclusive uncapped fixed LTE (F-LTE) packages. The operator is also running a promotion on the 24-month contractual period, where customers are rewarded with a free router and discounted subscription fees. Table 48 below shows the MyMTN Home Uncapped F-LTE/5G Price Plans and the promotional offer.

Table 48: MyMTN Home Uncapped 5G Price Plans

MyMTN Home Uncapped 5G Price Plans	Download Speed	Fair Usage Policy (FUP)	Sim-only month-to-month subscription (Incl. VAT)	24-month subscription (Incl. VAT) - Includes Router
MyMTN Home Uncapped F-LTE/5G Price Plans				
MyMTN Home Uncapped 5G 50Mbps	50Mbps	Uncapped Anytime data 1000GB FUP	R 999	R 1 099
MyMTN Home Uncapped 5G 100Mbps	100Mbps	Uncapped Anytime data 2000GB FUP	R 1 099	R 1 199
MyMTN Home Uncapped F-LTE/5G Price Plans Promotion				
MyMTN Home Uncapped F-LTE 10Mbps	10Mbps	Uncapped Anytime data 400GB FUP	N/A	R 499
MyMTN Home Uncapped F-LTE 20Mbps	20Mbps	Uncapped Anytime data 600GB FUP	N/A	R 699
MyMTN Home Uncapped F-LTE 30Mbps	30Mbps	Uncapped Anytime data 700GB FUP	N/A	R 799
MyMTN Home Uncapped F-LTE 50Mbps	50Mbps	Uncapped Anytime data 1000GB FUP	N/A	R 999
MyMTN Home Uncapped F-LTE 100Mbps	100Mbps	Uncapped Anytime data 2000GB FUP	N/A	R 1 099

Source: ICASA Database based on Tariff Notifications

The standard price plan offers customers uncapped SIM-only month-to-month (MtM) packages and 24-month device inclusive packages, subject to FUP. On the promotional offer, MTN reduced the subscription fees for the 50Mbps and 100Mbps

packages both by R 100, from R 1 099 and R 1 199 to R 999 and R 1 099, respectively. The MyMTN Home Uncapped 5G Price Plans were introduced in the market on 01 December 2021.

2.6.12. Amobia Wireless Packages

Amobia filed an amendment of its Wireless Packages with the Authority on 02 December 2021. The amendment did not result in a change in price but rather entailed the potential of Wireless Packages to 'burst' to double the base line speed depending on the network availability of customers. Table 49 below sets out the standard line speed and the potential line speed of the Amobia Wireless Packages.

Table 49: Amobia Wireless Packages

Standard Line Speed	Burst Line Speed	Price
4/2Mbps	Up to 8Mbps	R 405
5/2Mbps	Up to 10Mbps	R 505
8/2Mbps	Up to 16Mbps	R 705
10/2Mbps	Up to 20Mbps	R 865

Source: ICASA Database Based on Tariff Notifications

The Amobia Wireless Packages 10Mbps burst line speed priced at R 505 can be compared to the Herotel 10Mbps FTTH package analysed in the 2021/22 FY Q2 Bi-annual Tariff Analysis Report³⁴ priced at R 699 or R 194 (38.4%) more. The amendment of the Amobia Wireless Packages became effective on 13 December 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 July 2021 to 31 December 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

³⁴ Page 72, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/tariffs-analysis-report-01-jan-to-30-jun-2021> > Accessed on 01 March 2022.

offered during the period under review. Additionally, this section provides a brief comparative analysis of a few selected fibre products in the market.

2.7.1. Self-Built FTTH Offerings

2.7.1.1. SADV Serengeti FTTH

SADV filed an amendment of its Serengeti FTTH with the Authority on 20 July 2021. The amendment entailed price reductions and an upgrade of line speeds of certain packages. Table 50 below sets out the amendment of the SADV Serengeti FTTH.

Table 50: SADV Serengeti FTTH

Current Line Speed	New Line Speed	Previous Price	Current Price	Price Difference	Variance (%)
10/10Mbps	20/10Mbps	R 599	R 595	-R 4	-0.7%
20/20Mbps	50/50Mbps	R 799	R 795	-R 4	-0.5%
50/50Mbps	N/A	R 899	R 795	-R 104	-11.6%
100/100Mbps	N/A	R 1 199	R 945	-R 254	-21.2%
200/200Mbps	N/A	R 1 499	R 1 085	-R 414	-27.6%
1000/200Mbps	N/A	R 3 499	R 1 245	-R 2 254	-64.4%

Source: ICASA Database Based on Tariff Notifications

The largest decrease in absolute and percentage terms of 64.4% or R 2 254 occurred on the SADV Serengeti 1000/200Mbps line speed. The amendment of the SADV Serengeti became effective on 01 August 2021.

2.7.1.2. Vox Telecoms FTTH

Vox Telecom filed amendments to the FTTH with the Authority on 22 July and 24 November 2021. The notification entailed tariff adjustments, line speed upgrades and the introduction of new packages for selected FTTH packages. Table 51 below sets out the tariff and product amendments on Vox Telecom FTTH packages.

Table 51: Vox Telecoms FTTH

22 July 2021					
Previous Line Speed	Current Line Speed	Previous Price	Current Price	Price Difference	Variance (%)
10/5Mbps	20/10Mbps	R 639	R 639	R 0	0%
10/10Mbps	20/20Mbps	R 739	R 739	R 0	0%

20/10Mbps	50/25Mbps	R 839	R 839	R 0	0%
20/20Mbps	50/50Mbps	R 899	R 899	R 0	0%
40/20Mbps	100/100Mbps	R 1 039	R 1 039	R 0	0%
40/40Mbps	100/100Mbps	R 1 089	R 1 039	-R 50	-4.6%
100/50Mbps	200/200Mbps	R 1 189	R 1 189	R 0	0%
100/100Mbps	200/200Mbps	R 1 249	R 1 189	-R 60	-4.8%
200/100Mbps	200/200Mbps	R 1 499	R 1 189	-R 310	-20.7%
24 November 2021					
Package	Previous Price	Current Price	Price Difference	Variance (%)	
4/1Mbps	R 439	R 465	R 26	5.9%	
10/10Mbps	R 554	R 630	R 76	13.7%	
20/20Mbps	R 706	R 630	-R 76	-10.8%	
50/50Mbps	R 907	R 795	-R 112	-12.3%	
100/100Mbps	R 1 311	R 1 035	-R 276	-21.1%	
200/200Mbps	R 1 549	R 1 245	-R 304	-19.6%	
25/25Mbps	N/A	R 630	N/A	N/A	

Source: ICASA Database Based on Tariff Notifications

The table above shows that some customers incurred higher subscription costs, for example the largest price increase in percentage terms of 13.7% occurred on the Vox Telecom 10/10Mbps FTTH package, which is now priced the same as the Vox Telecom 20/20Mbps FTTH package at R 630, which means customers would be better off selecting the 20/20Mbps FTTH package. Conversely some customers incurred lower subscription costs, for example the largest price decrease in percentage terms of 21.1% occurred on the Vox Telecom 100/100Mbps FTTH package. The Vox Telecom 20/20Mbps FTTH package priced at R 630 can be compared to the Cipherwave Zoom Fibre 20/20Mbps analysed in the 2021/22 FY Q2 Bi-annual Tariff Analysis Report³⁵ priced at R 688 or R 58 (9.2%) more. The amendments of the Vox Telecom FTTH became effective on 01 August and 01 December 2021, respectively.

2.7.1.3. MWEB FTTH

MWEB filed an amendment to its FTTH packages with the Authority on 19 October 2021. The amendment entailed a price reduction of the 20/10Mbps package. Table 52 below sets out the change in tariffs on MWEB FTTH.

Table 52: MWEB FTTH

19 October 2021

³⁵ Page 70, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/tariffs-analysis-report-01-jan-to-30-jun-2021> > Accessed on 01 March 2022.

Product Description	Previous Price	Current Price	Price Difference	Variance (%)
20/10Mbps	R 399	R 369	-R 30	-7.5%

Source: ICASA Database Based on Tariff Notifications

The amendment of the MWEB FTTH became effective on 22 October 2021.

2.7.1.4. Ibity Internet Fibre FTTH

Ibity Internet filed an amendment of its FTTH with the Authority on 21 October 2021. The amendment entailed line speed upgrades, price changes, the introduction of new packages and the termination of certain packages. Table 53 below details the amendments on Ibity Internet Fibre FTTH.

Table 53: Ibity Internet Fibre FTTH

Product Description	Previous Price	Current Price	Price Difference	Variance (%)
50Mbps	R 599	R 499	-R 100	-16.7%
100Mbps	R 699	R 599	-R 100	-14.3%
200Mbps	R 799	R 699	-R 100	-12.5%
500Mbps	R 999	R 799	-R 200	-20%
1000Mbps	R 1 299	R 999	-R 300	-23.1%
Previous Line Speed	Current Line Speed		Price	
10Mbps	30Mbps		R 399	
20Mbps	50Mbps		R 499	

Source: ICASA Database Based on Tariff Notifications

The amendments on Ibity Internet Fibre FTTH became effective on 01 November 2021.

2.7.1.5. Ibity Internet Uncapped Shaped Packages

Ibity Internet filed its Uncapped Shaped with the Authority on 21 October 2021. The Ibity Internet Uncapped Shaped Packages offers customers FTTH packages ranging from 10Mbps to 200Mbps. Table 54 below sets out the packages and prices available on Ibity Internet Uncapped Shaped Packages.

Table 54: Ibity Internet Uncapped Shaped Packages

Product Description	Price
10Mbps	R 299
20Mbps	R 399
30Mbps	R 499

40Mbps	R 599
50Mbps	R 699
75Mbps	R 2 399
100Mbps	R 2 899
200Mbps	R 4 899

Source: ICASA Database Based on Tariff Notifications

The Ibits Internet Uncapped Shaped Packages 10Mbps priced at R 299 can be compared to the FWORX Uncapped 10Mbps priced at R 499 or 66.9% more. The Ibis Internet Uncapped Shaped Packages were launched in the market on 01 November 2021.

2.7.1.6. Vodacom Fibre Prepaid

Vodacom filed its Fibre Prepaid tariff plan with the Authority on 03 November 2021, wherein it offers prepaid uncapped Internet services valid for 30 days. Table 55 shows the uncapped prepaid packages offered to customers.

Table 55: Vodacom Fibre Prepaid Service

Line Speed	Data Allocation	Monthly Subscription (Incl. VAT)
20/10	Uncapped	R 599
20/20		R 699
50/25		R 799
50/50		R 899
100/100		R 999
200/200		R 1 199

Source: ICASA Database Based on Tariff Notifications

As shown in the table above, the download speeds range from 20Mbps to 200Mbps while the upload speeds range from 10Mbps to 200Mbps. It should be noted that customers are subject to a once-off installation and activation fee of R 1 599. Vodacom introduced its Fibre Prepaid tariff plan in the market on 12 November 2021.

2.7.1.7. FWORX Capped and Uncapped Packages

On 18 November 2021 Francois O’Kennedy W.O.R.X filed an amendment with the Authority of the FWORX Capped and Uncapped Packages wherein it reduced the

prices of certain packages to the benefit of customers. Table 56 below details the price amendments on the FWORX Capped and Uncapped Packages.

Table 56: FWORX Capped and Uncapped Packages

Package	Previous Price	Current Price	Price Difference	Variance (%)
Uncapped Packages				
4Mbps	R 400	R 375	-R 25	-6.3%
10Mbps	R 750	R 499	-R 251	-33.5%
Capped Packages				
10GB	R 150	R 125	-R 25	-16.7%
20GB	R 230	R 199	-R 31	-13.5%
100GB	R 650	R 599	-R 51	-7.8%

Source: ICASA Database Based on Tariff Notifications

The highest decrease in absolute and percentage terms of R 251 or 33.5% occurred on the 10Mbps Uncapped package. The amendment on the FWORX Capped and Uncapped Packages became effective on 01 January 2022.

2.7.1.8. Lasernet FTTx

Lasernet filed various FTTx amendments with the Authority on 19 November 2021. The amendment entailed the introduction, termination and price reductions of certain FTTx packages. Table 57 below sets out the amendments on Lاسernet FTTx.

Table 57: Lاسernet FTTx

Lاسernet on Openserve FTTH and ADSL				
Package	Previous Price	Current Price	Price Difference	Variance (%)
25/25Mbps	N/A	R 799	N/A	N/A
50/25Mbps	N/A	R 999	N/A	N/A
100/50Mbps	R 1 899	R 1 299	-R 600	-31.6%
200/100Mbps	R 2 049	R 1 899	-R 150	-7.3%
Terminated Packages				
10/5Mbps	R 799	N/A	N/A	N/A
10/10Mbps	R 999	N/A	N/A	N/A
20/10Mbps	R 999	N/A	N/A	N/A
20/20Mbps	R 1 299	N/A	N/A	N/A
Lاسernet on Knysna FTTH				
10/10Mbps	R 899	R 599	-R 301	-33.4%
15/15Mbps	N/A	R 629	N/A	N/A
30/30Mbps	N/A	R 790	N/A	N/A
50/50Mbps	R 1 499	R 890	-R 609	-40.6%
100/100Mbps	R 1 899	R 970	-R 929	-48.9%
200/200Mbps	R 2 649	R 1 199	-R 1 450	-54.7%
Terminated Packages				
20/20Mbps	R 1 199	N/A	N/A	N/A
Lاسernet on Knysna FTTB Enterprise				
10/10Mbps	R 4 599	R 3 999	-R 600	-13%
20/20Mbps	R 5 749	R 4 999	-R 750	-13%
50/50Mbps	R 8 279	R 7 199	-R 1 080	-13%

100/100Mbps	R 11 499	R 9 999	-R 1 500	-13%
200/200Mbps	R 20 699	R 17 999	-R 2 700	-13%
500/500Mbps	R 37 949	R 32 999	-R 4 950	-13%
1/1Gbps	R 68 999	R 59 999	-R 9 000	-13%
Lasernet on Octotel FTTH				
15/15Mbps	N/A	R 755	N/A	N/A
30/30Mbps	N/A	R 905	N/A	N/A
100/100Mbps	N/A	R 1 095	N/A	N/A
200/200Mbps	N/A	R 1 235	N/A	N/A
1Gbps/25Mbps	N/A	R 1 565	N/A	N/A

Source: ICASA Database Based on Tariff Notifications

The largest price decrease in percentage terms of 54.7% occurred on the Lasernet on Knysna 200/200Mbps FTTH package, and the largest decrease in absolute terms of R 9 000 occurred on the Lasernet on Knysna 1/1Gbps FTTH package. The Lasernet on Openserve FTTH and ADSL 200/100Mbps priced at R 1 899 can be compared to the Amobia on Openserve FTTH 200/100Mbps priced at R 1 099 or 42.1% less. The Lasernet FTTH plan was launched on the market on 01 December 2021.

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

2.7.2.1. Cybersmart on Vumatel FTTH

On 01 and 09 July 2021 Cybersmart filed amendments to the Authority of its FTTH on the Vumatel network. The amendments entailed the termination, introduction and price reductions on certain FTTH packages. Table 58 below sets out the amendment of the Cybersmart on Vumatel FTTH plan.

Table 58: Cybersmart on Vumatel FTTH

01 July 2021					
Product Description			Price		
10/10Mbps			N/A		
20/10Mbps			R 628.90		
09 July 2021					
Previous Line Speed	Current Line Speed	Previous Price	Current Price	Price Difference	Variance (%)
50/5Mbps	50/50Mbps	R 989	R 898	-R 91	-9.2%
100/10Mbps	100/100Mbps	R 1 099	R 989	-R 110	-10%
200/20Mbps	200/200Mbps	R 1 399	R 1 139	-R 260	-18.6%

Source: ICASA Database Based on Tariff Notifications

The Cybersmart on Vumatel 10/10Mbps package was replaced by a 20/10Mbps without a change in price, which resulted in customers receiving more value for money. The Cybersmart on Vumatel 20/10Mbps priced at R 628.90 can be compared to the SADV on Vumatel 20/10Mbps priced at R 685 or 8.9% more. The largest price reduction in absolute value and percentage terms of R 260 or 18.6% occurred on the 200/200Mbps. The Cybersmart on Vumatel 100/100Mbps priced at R 989 can be compared to the SADV on Vumatel Vuma 100/100Mbps priced at R 975 or 1.4% less.

The amendments of the Cybersmart on Vumatel FTTH plan became effective on 02 and 16 July 2021.

2.7.2.2. MTN Supersonic FTTH Review

MTN's Supersonic FTTH Review was filed with the Authority on 07 July 2021, wherein the operator introduced new line speeds, discontinued selected line speeds, and adjusted prices of selected FTTH packages. Table 59 below details the amendment.

Table 59: Amendment to MTN's Supersonic FTTH Plan

Line Speed (Mbps)	Previous Price	Current Price	Price Difference	Variance (%)
Vumatel FTTH				
10/10	Decommissioned			
20/20	Decommissioned			
50/5	Decommissioned			
100/10	Decommissioned			
200/20	Decommissioned			
1Gbps	Decommissioned			
20/10	N/A	R 695	N/A	N/A
50/50	R 995	R 895	-R 100	-10.1%
100/100	R 1 195	R 995	-R 200	-16.7%
200/200	R 1 549	R 1 145	-R 404	-26.1%
1000/200	N/A	R 1 445	N/A	N/A
1000/500	N/A	R 2 295	N/A	N/A
Frogfoot FTTH				
10/10	Decommissioned			
20/20	Decommissioned			
30/30	N/A	R 695	N/A	N/A
50/50	R 995	R 845	-R 150	-15.1%
100/100	R 1 029	R 995	-R 34	-3.3%
200/200	R 1 199	R 1 195	-R 4	-0.3%
Link Layer FTTH				
10/10	Decommissioned			
20/20	Decommissioned			
25/25	N/A	R 695	N/A	N/A
50/50	R 995	R 895	-R 100	-10.1%

100/100	R 1 195	R 995	-R 200	-16.7%
200/200	R 1 349	R 1 195	-R 154	-11.4%
300/300	N/A	R 1 349	N/A	N/A
1Gbps	N/A	R 1 449	N/A	N/A
Metro Fibre FTTH				
10/10	Decommissioned			
25/25	R 895	R 695	-R 200	-22.3%
50/50	R 995	R 845	-R 150	-15.1%
100/100	R 1 195	R 995	-R 200	-16.7%
200/200	R 1 799	R 1 195	-R 604	-33.6%
300/300	N/A	R 1 549	N/A	N/A

Source: ICASA Database Based on Tariff Notifications

As shown in the table above, the 200/200Mbps line speed had the greatest tariff decrease in both percentage and absolute value terms of R 604 or 33.6%, from R 1 799 to R 1 195. It should be noted that MWEB offers its 30/30Mbps FTTH on Frogfoot for R 839, which is R 144 or 20.7% more than what MTN charges. MTN's amendment came to effect on 16 July 2021.

2.7.2.3. MWEB on Clear Access and Evotel FTTH

MWEB filed an amendment of its FTTH on the Clear Access and Evotel network with the Authority on 19 July 2021. The amendment entailed the introduction of new packages, the upgrade of line speeds and the amendment of prices of certain packages. Table 60 below details the amendment of the MWEB on Clear Access and Evotel FTTH plans.

Table 60: MWEB on Clear Access and Evotel FTTH

Evotel					
Previous Line Speed	Current Line Speed	Previous Price	Current Price	Price Difference	Variance (%)
N/A	10/2Mbps	N/A	R 549	N/A	N/A
10/5Mbps	20/10Mbps	R 629	R 699	R 70	11.1%
10/10Mbps	20/10Mbps	R 679	R 699	R 20	2.9%
20/5Mbps	20/10Mbps	R 829	R 699	-R 130	-15.7%
20/20Mbps	50/50Mbps	R 849	R 849	R 0	0%
50/10Mbps	50/50Mbps	R 969	R 849	-R 120	-12.4%
50/50Mbps	50/50Mbps	R 999	R 849	-R 150	-15%
100/20Mbps	100/100Mbps	R 1 079	R 1 049	-R 30	-2.8%
100/100Mbps	100/100Mbps	R 1 099	R 1 049	-R 50	-4.5%
200/40Mbps	200/200Mbps	R 1 279	R 1 249	-R 30	-2.3%
200/200Mbps	200/200Mbps	R 1 399	R 1 249	-R 150	-10.7%
N/A	100/500Mbps	N/A	R 1 399	N/A	N/A
Clear Access					
Product Description			Price		
10/10Mbps			R 689		
20/20Mbps			R 789		

50/50Mbps	R 889
100/100Mbps	R 1 149
200/200Mbps	R 1 389

Source: ICASA Database Based on Tariff Notifications

The largest decrease in percentage terms of 15.7% occurred on the MWEB on Evotel 20/10Mbps package. The largest increase in absolute and percentage terms of 11.1% or R 70 occurred on the MWEB on Evotel 20/10Mbps. The MWEB on Evotel 10/2Mbps priced at R 549 is comparable and priced in line with the Cybersmart on Evotel 10/2Mbps priced at R 548 or 0.2% less. The amendment of the MWEB on Evotel and Clear Access FTTH plans became effective on 01 August 2021 and 19 August 2021, respectively.

2.7.2.4. MWEB on Vodacom FTTH

The amendment of the MWEB on Vodacom FTTH was filed with the Authority on 20 July 2021. The amendment entailed the upgrade of line speeds and price reductions. Table 61 below details the amendment of the MWEB on Vodacom FTTH plan.

Table 61: MWEB on Vodacom FTTH

Previous Line Speed	Current Line Speed	Previous Price	Current Price	Price Difference	Variance (%)
10/5Mbps	20/10Mbps	R 599	R 599	R 0	0%
10/10Mbps	20/20Mbps	R 679	R 649	-R 30	-4.4%
20/10Mbps	50/25Mbps	R 779	R 719	-R 60	-7.7%
20/20Mbps	50/50Mbps	R 839	R 769	-R 70	-8.3%
40/20Mbps	100/100Mbps	R 949	R 899	-R 50	-5.3%
40/40Mbps	100/100Mbps	R 989	R 899	-R 90	-9.1%
100/50Mbps	200/200Mbps	R 1 099	R 1 049	-R 50	-4.5%
100/100Mbps	200/200Mbps	R 1 189	R 1 049	-R 140	-11.8%
200/100Mbps	200/200Mbps	R 1 299	R 1 049	-R 250	-19.2%

Source: ICASA Database Based on Tariff Notifications

The largest price decrease in absolute and percentage terms of 19.2% or R 250 occurred on the MWEB on Vodacom 200/200Mbps package. The MWEB on Vodacom 20/20Mbps priced at R 649 can be compared to the Directel on Vodacom Apollo 20 priced at R 745 or 14.8% more. The amendment of the MWEB on Vodacom FTTH plan became effective on 01 August 2021.

2.7.2.5. MetroFibre AITSA and GIGAGO FTTH

MetroFibre filed an amendment to its AITSA and GIGAGO FTTH with the Authority on 22 July 2021. The amendment entailed price reductions, the introduction and termination of certain packages. Table 62 below details the amendment of the MetroFibre AITSA and GIGAGO FTTH plan.

Table 62: MetroFibre AITSA and GIGAGO FTTH

Openserve				
Product Description	Previous Price	Current Price	Price Difference	Variance (%)
10/10Mbps	R 659	N/A	N/A	N/A
25/25Mbps	R 899	R 699	-R 200	-22.2%
50/25Mbps	R 1 099	R 859	-R 240	-21.8%
100/50Mbps	R 1 299	R 979	-R 320	-24.6%
200/100Mbps	N/A	R 1 159	N/A	N/A
Vumatel/SADV				
10/10Mbps	R 659	N/A	N/A	N/A
20/10Mbps	R 899	R 699	-R 200	-22.2%
50/50Mbps	R 1 099	R 899	-R 200	-18.2%
100/100Mbps	R 1 299	R 1 099	-R 200	-15.4%
200/200Mbps	N/A	R 1 199	N/A	N/A
Frogfoot				
10/10Mbps	R 659	N/A	N/A	N/A
20/20Mbps	R 899	N/A	N/A	N/A
30/30Mbps	N/A	R 759	N/A	N/A
50/50Mbps	R 1 099	R 899	-R 200	-18.2%
100/100Mbps	R 1 299	R 999	-R 300	-23.1%
MetroFibre Network				
10/10Mbps	R 659	N/A	N/A	N/A
200/200Mbps	N/A	R 1 650	N/A	N/A

Source: ICASA Database Based on Tariff Notifications

The largest price decrease in percentage and absolute terms of R 320 or 24.6% occurred on the MetroFibre AITSA and GIGAGO on Openserve 100/50Mbps package. The MetroFibre AITSA and GIGAGO on Frogfoot 30/30Mbps priced at R 759 can be compared to the SADV on Frogfoot 30/30Mbps priced at R 855 or 12.6% more. The amendment of the MetroFibre AITSA and GIGAGO FTTH plan became effective on 01 August 2021.

2.7.2.6. Directel on Evotel FTTH

The amendment of the Directel on Evotel FTTH was filed to the Authority on 23 July 2021. The amendment entailed line speed upgrades and a price adjustment. Table 63 below details the amendment of the Directel on Evotel FTTH plan.

Table 63: Directel on Evotel FTTH

Previous Line Speed	Current Line Speed	Previous Price	Current Price	Price Difference	Variance (%)
Apollo 10/10	Apollo 20/10	R 695	R 695	R 0	0%
Apollo 20/20	Apollo 50/50	R 855	R 995	R 140	16.4%

Source: ICASA Database Based on Tariff Notifications

The line speed upgrade of the Apollo 20/20 was accompanied by a price increase of 16.4%, which negatively impacted customers as it increased the cost to communicate. The Directel on Evotel Apollo 50/50 priced at R 995 is comparable to the Cybersmart on Evotel 50/50Mbps priced at R 842 or 15.4% less. The amendment of the Directel on Evotel FTTH plan became effective on 01 August 2021.

2.7.2.7. Amobia on Openserve FTTH

Amobia filed its FTTH on the Openserve network with the Authority on 23 July 2021. The Authority received an amendment from Amobia on 09 December 2021 for the FTTH on the Openserve network which entailed the termination and introduction of certain packages. The original Amobia on Openserve FTTH filing entailed four line speed packages ranging from 25/25Mbps to 200/200Mbps and priced from R 549 to R 1 099. Table 64 below sets out the line speeds and prices on the Amobia on Openserve FTTH plan.

Table 64: Amobia on Openserve FTTH

23 July 2021			
Product Description		Price	
25/25Mbps		R 549	
50/50Mbps		R 739	
100/100Mbps		R 899	
200/200Mbps		R 1 099	
09 December 2021			
Previous Package	Current Package	Previous Price	Current Price
100/100Mbps	100/50Mbps	R 899	R 899
200/200Mbps	200/100Mbps	R 1 099	R 1 099
N/A	500/250Mbps	N/A	R 1 099

Source: ICASA Database Based on Tariff Notifications

The Amobia on Openserve 25/25Mbps priced at R 549 offers more value to customers than the SADV on Openserve 25/25Mbps priced at R 585 or 6.6% more.

The new packages on Amobia on Openserve FTTH entailed lower line speeds than their previous versions without a change in price. Amobia on Openserve's 100/50Mbps can be compared to the SADV on Openserve 100/50Mbps priced at R 855 or 4.9% less. The Amobia on Openserve FTTH plan was launched on the market on 05 August 2021 and the amendment became effective on 21 December 2021.

2.7.2.8. MWEB on Frogfoot FTTH

MWEB filed an amendment of its FTTH on the Frogfoot network with the Authority on 27 July 2021. The amendment entailed price decreases across all packages. Table 65 below sets out the price reductions on the MWEB on Frogfoot FTTH plan.

Table 65: MWEB on Frogfoot FTTH

Product Description	Previous Price	Current Price	Price Difference	Variance (%)
30/30Mbps	R 699	R 649	-R 50	-7.2%
50/5Mbps	R 699	R 659	-R 40	-5.7%
50/50Mbps	R 819	R 799	-R 20	-2.4%
100/10Mbps	R 839	R 799	-R 40	-4.8%
100/100Mbps	R 929	R 899	-R 30	-3.2%
200/200Mbps	R 1 049	R 999	-R 50	4.8%
500/50Mbps	R 1 199	R 1 149	-R 50	-4.2%
500/500Mbps	R 1 499	R 1 289	-R 210	-14%
1000/100Mbps	R 1 799	R 1 299	-R 500	-27.8%
1Gbps	R 1 799	R 1 499	-R 300	-16.7%

Source: ICASA Database Based on Tariff Notifications

The largest decrease in absolute and percentage terms occurred on the MWEB on Frogfoot 1000/100Mbps of R 500 or 27.8%. The MWEB on Frogfoot 30/30Mbps priced at R 649 can be compared to the SADV on Frogfoot 30/30Mbps priced at R 855 or 31.7% more. The amendment of the MWEB on FrogFoot FTTH plan became effective on 01 September 2021.

2.7.2.9. Vodacom FTTH

Vodacom filed an amendment to its FTTH packages with the Authority on 27 July 2021. The amendment entailed the price reduction of selected packages and the introduction of new line speeds, as shown in table 66 below.

Table 66: Amendments to Vodacom FTTH

Line Speed (Mbps)	Previous Monthly Subscription	Current Monthly Subscription	Price Difference	Variance (%)
MetroFibre (MFN)				
25/25	R 806.01	R 649	-R 157.01	-19.5%
50/50	R 1 007.76	R 799	-R 208.76	-20.7%
100/100	R 1 411.27	R 999	-R 412.27	-29.2%
200/200	R 1 814.78	R 1 149	-R 665.78	-36.7%
300/300	N/A	R 1 399	N/A	N/A
Octotel				
35/25	N/A	R 679	N/A	N/A
50/50	N/A	R 799	N/A	N/A
100/100	R 1 139	R 999	-R 140	-12.3%
200/200	R 1 399	R 1 149	-R 250	-17.9%
1000/100	N/A	R 1 499	N/A	N/A
Vodacom				
20/10	R 849	R 599	-R 250	-29.4%
20/20	R 899	R 699	-R 200	-22.2%
50/25	N/A	R 799	N/A	N/A
50/50	N/A	R 899	N/A	N/A
100/100	R 1 249	R 999	-R 250	-20.0%
200/200	N/A	R 1 299	N/A	N/A
Vumatel				
20/10	N/A	R 699	N/A	N/A
50/50	R 1 099	R 899	-R 200	-18.2%
100/100	R 1 249	R 1 099	-R 150	-12.0%
200/200	N/A	R 1 299	N/A	N/A
1000/200	N/A	R 1 499	N/A	N/A
1000/500	N/A	R 2 299	N/A	N/A
Vumatel Aerial and Vuma Village				
20/10	N/A	R 699	N/A	N/A
50/50	R 1 099	R 899	-R 200	-18.2%
100/100	R 1 249	R 1 099	-R 150	-12.0%
200/200	N/A	R 1 299	N/A	N/A
1000/200	N/A	R 1 499	N/A	N/A
1000/500	N/A	R 2 299	N/A	N/A

Source: ICASA Database Based on Tariff Notifications

Table 66 above shows that the largest price decrease in both absolute and percentage terms occurred in the 200/200Mbps package on the MetroFibre network, decreasing by R 665.78 or 36.7%, from R 1 814.78 to R 1 149. MWEB also offers its 25/25Mbps FTTH on MetroFibre's network for R 649³⁶, while Telkom

³⁶ Page 94, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/tariffs-analysis-report-01-jan-to-30-jun-2021> > Accessed on 14 January 2022

offers it for R 699, which is R 50 or 7.7% more. Vodacom's amendment came to effect on 05 August 2021.

2.7.2.10. Directel on Vodacom FTTH

Directel filed an amendment to its FTTH packages on Vodacom with the Authority on 03 August 2021. The amendments entailed line speed upgrades and price decreases on certain packages.

Table 67 below sets out the line speed upgrades on the Directel on Vodacom FTTH packages.

Table 67: Directel on Vodacom FTTH

Package	Previous Price	Current Price	Price Difference	Variance (%)
Apollo 20	R 895	R 745	-R 150	-16.8%
Apollo 50	N/A	R 895	N/A	N/A
Apollo 100	R 1 185	R 1 025	-R 160	-13.5%
Apollo 200	R 1 295	R 1 185	-R 110	-8.5%

Source: ICASA Database Based on Tariff Notifications

The Directel on Vodacom Apollo 100 priced at R 1 025 can be compared to the MWEB on Vodacom 100/100Mbps priced at R 1 049 or 2.3% more. The amendment of Directel on Vodacom FTTH plan became effective on 01 September 2021.

2.7.2.11. Amobia on Vumatel FTTH

Amobia filed amendments of its Vumatel FTTH with the Authority on 06 August 2021. The amendments entailed line speed upgrades, the introduction of new line speed packages and the termination of certain packages. Table 68 below details the amendments of the prices and packages on the Amobia on Vumatel FTTH plan.

Table 68: Amobia on Vumatel FTTH

06 August 2021	
Product Description	Price
1000/200Mbps	R 1 399

Source: ICASA Database Based on Tariff Notifications

The new Amobia on Vumatel 1000/200Mbps priced at R 1 399 can be compared with the SADV on Vumatel 1000/200Mbps priced at R 1 215 or 13.2% less. The amendments of the Amobia on Vumatel FTTH plan became effective on 20 August 2021.

2.7.2.12. SADV FTTH

On 06 August 2021 the Authority received a notification from SADV regarding amendments in the form of price reductions to currently existing packages and the termination of line speeds on certain packages. The amendments were on the SADV on Vumatel, SADV on Openserve and SADV on Frogfoot FTTH packages. Table 69 below sets out the price amendments and new packages introduced on the various SADV FTTH packages.

Table 69: SADV FTTH

Vumatel				
Product Description	Previous Price	Current Price	Price Difference	Variance (%)
Vuma-fh-20-10	R 745	R 685	-R 60	-8.1%
Vuma-fh-50-50	R 975	R 855	-R 120	-12.3%
Vuma-fh-100-100	R 1 095	R 975	-R 120	-11%
Vuma-fh-200-200	R 1 255	R 1 095	-R 16	-12.7%
Vuma-fh-1000-200	R 1 445	R 1 215	-R 230	-15.9%
Vuma-fh-1000-500	R 2 295	R 1 945	-R 350	-15.3%
Openserve				
Openserve-fh-25-25	R 585	R 585	R 0	0%
Openserve-fh-50-25	R 795	R 695	-R 100	-12.6%
Openserve-fh-100-50	R 955	R 855	-R 100	-10.5%
Openserve-fh-200-100	R 1 145	R 1 045	-R 100	-8.7%
Frogfoot				
Frogfoot-fh-10-10	R 585	R 585	R 0	0%
Frogfoot-fh-30-3	R 795	R 695	-R 100	-12.6%
Frogfoot-fh-30-30	R 955	R 855	-R 100	-10.5%
Frogfoot-fh-50-5	R 1 145	R 1 045	-R 100	-8.7%
Frogfoot-fh-50-50	R 905	R 795	-R 110	-12.2%
Frogfoot-fh-100-10	R 945	R 85	-R 90	-9.5%
Frogfoot-fh-100-100	R 995	R 895	-R 100	-10.1%
Frogfoot-fh-200-200	R 1 095	R 995	-R 100	-9.1%
Frogfoot-fh-500-500	R 1 375	R 1 295	-R 80	-5.8%
Frogfoot-fh-1GB-100	R 1 695	R 1 695	R 0	0%

Source: ICASA Database Based on Tariff Notifications

The largest price decrease in percentage terms occurred on the SADV on Vumatel Vuma 1000/200 of 15.9% which positively impacted customers as it reduced the cost to communicate. The SADV on Openserve 100/50 priced at R 855 can be compared with the Amobia on Openserve 100/50Mbps priced at R 899 or 5.1%

more. The amendments on the various SADV FTTH packages became effective on 10 August 2021.

2.7.2.13. MWEB on Openserve FTTH

MWEB filed new FTTH product on its Openserve network with the Authority on 20 and 27 August 2021, wherein it introduced an uncapped 500/250Mbps line speed package priced at R 1 279 per month. The MWEB on Openserve 500/250Mbps can be compared with the Cybersmart Openserve Lite Fibre 500/250Mbps priced at R 1 299 or 1.6% more. The MWEB on Openserve 500/250Mbps FTTH package was launched in the market on 31 August 2021. MWEB also introduced a 25/25Mbps FTTH package on 20 August 2021 priced at R 399.

In addition, MWEB filed its FTTH on the Openserve network with the Authority on 10 September 2021. The two package MWEB FTTH offering is part of a Proof-of-Concept (POC) service which is offered in select suburbs with the Openserve network. Table 70 below sets out the details of the MWEB on Openserve FTTH plan.

Table 70: MWEB on Openserve

20 August 2021	
Product Description	Price
25/25Mbps Uncapped	R 399
27 August 2021	
Product Description	Price
10/5Mbps Uncapped	R 299
20/10Mbps Uncapped	R 399

Source: ICASA Database Based on Tariff Notifications

The two-package MWEB on Openserve FTTH was launched in the market on 15 September 2021.

2.7.2.14. Cybersmart Openserve Lite Fibre

Cybersmart filed a new FTTH product on its Openserve network with the Authority on 26 August 2021, wherein it introduced a 500/250Mbps line speed package priced at R 1 299 per month.

Cybersmart's Openserve Lite Fibre 500/250Mbps can be compared with the MWEB on Openserve 500/250Mbps priced at R 1 279 or 1.5% less. The Cybersmart Openserve Lite Fibre was launched was on 10 September 2021.

2.7.2.15. Cell C C-Fibre Vumatel Village Tariff Plan

Cell C filed an amendment of its C-Fibre Vumatel Village Tariff Plan with the Authority on 31 August 2021. The Cell C Vumatel Village Tariff Plan was originally filed with the Authority on 27 August 2020 and analysed in the 2020/21 FY Q4 Bi-annual Report³⁷. The amendment entailed line speed upgrades and price reductions. Table 71 below sets out the line speed upgrades and price reductions on the Cell C C-Fibre Vumatel Village Tariff Plan.

Table 71: Cell C C-Fibre Vumatel Village Tariff Plan

C-Fibre Vumatel Village					
Product Description	Current Speed	Previous Price	Current Price	Price Difference	Variance (%)
C-Fibre 10/10Mbps	20/10Mbps	R 799	R 799	R 0	0%
C-Fibre 20/2Mbps	20/10Mbps	R 929	R 799	-R 130	-14%
C-Fibre 50/50Mbps	50/50Mbps	R 1 099	R 949	-R 150	-13.6%
C-Fibre 100/100Mbps	100/100Mbps	R 1 199	R 1 099	-R 100	-8.3%
C-Fibre 200/200Mbps	1Gbps/200Mbps	R 1 419	R 1 299	-R 120	-8.5%
1Gbps/100Mbps	1Gbps/200Mbps	R 1 499	R 1 469	-R 30	-2%

Source: ICASA Database Based on Tariff Notifications

The largest price reduction in percentage terms of 14% occurred on the C-Fibre 20/2Mbps package. The Cell C C-Fibre Vumatel Village 100/100Mbps can be compared with the Directel on Vumatel Apollo 100/100³⁸ priced at R 1 045 or 4.9% less. The amendment of the Cell C C-Fibre Vumatel Village Tariff Plan became effective on 01 October 2021.

³⁷ Page 81, 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 14 January 2022

³⁸ Page 104, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/tariffs-analysis-report-01-jan-to-30-jun-2021> > Accessed on 14 January 2022

2.7.2.16. Telkom FTTH

Telkom's amendment to its FTTH was filed with the Authority on 08 September 2021. The amendment entailed price reductions on certain FTTH packages on the Frogfoot network and the introduction of new FTTH packages on the MetroFibre network. Table 72 below sets out a sample of the amendments on Telkom FTTH plan.

Table 72: Telkom FTTH

Telkom on Frogfoot				
Description	Previous Price	Current Price	Price Difference	Variance (%)
Softcap 30/3Mbps	R 659	R 510	-R 149	-22.6%
Unlimited Home 50/50Mbps	R 799	R 849	R 50	6.3%
Unlimited Home Lite 50/5Mbps	R 799	R 699	-R 100	-12.5%
Telkom on MetroFibre				
Unlimited Home Lite 25/25Mbps	N/A	R 699	N/A	N/A
Unlimited Home Lite 50/50Mbps	N/A	R 799	N/A	N/A

Source: ICASA Database Based on Tariff Notifications

The price reductions and the introduction of new packages positively impacted customers who experienced a reduction in the cost to communicate and an increase in the options available in the fibre market. The Telkom on Frogfoot Unlimited Home 50/50Mbps can be compared to the MWEB on Frogfoot 50/50Mbps³⁹ priced at R 699 or 17.7% less. The amendments of the Telkom FTTH plan became effective on 20 September 2021.

2.7.2.17. Cybersmart on Evotel FTTH

Cybersmart filed its FTTH on the Evotel network with the Authority on 13 September 2021. Table 73 below set out the data and prices on the Cybersmart on Evotel FTTH plan.

³⁹ Page 88, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/tariffs-analysis-report-01-jan-to-30-jun-2021> > Accessed on 14 January 2022

Table 73: Cybersmart on Evotel FTTH

Description	Price
10/2Mbps	R 548
20/10Mbps	R 694
50/50Mbps	R 842
100/100Mbps	R 992
200/200Mbps	R 1 094
1000/500Mbps	R 1 272

Source: ICASA Database Based on Tariff Notifications

The Cybersmart on Evotel 200/200Mbps priced at R 1 094 is comparable to the Directel on Evotel Apollo 200/200 priced at R 1 395 or 27.5% more. The Cybersmart on Evotel FTTH was launched in the market on 01 October 2021.

2.7.2.18. Cybersmart on Openserve Web Connect

Cybersmart filed the Openserve Web Connect with the Authority on 15 September 2021. The plan entailed two FTTH packages with prices ranging from R 299 to R 369. Table 74 below sets out the line speeds and prices on Cybersmart on Openserve Web Connect.

Table 74: Cybersmart on Openserve Web Connect

Description	Price
10/5Mbps	R 299
20/10Mbps	R 369

Source: ICASA Database Based on Tariff Notifications

The Cybersmart on Openserve Web Connect was launched in the market on 08 October 2021.

2.7.2.19. Cipherwave on Mesh Telecom FTTH

Cipherwave filed its FTTH on the Mesh Telecom network with the Authority on 17 September 2021. The plan consisted of five symmetrical FTTH packages with line speeds ranging from 10Mbps to 200Mbps. Table 75 below details the prices and packages on the Mesh Telecom FTTH plan.

Table 75: Cipherwave on Mesh Telecom FTTH

Description	Price
FibreFunk Ultimate – 10/10Mbps	R 668
FibreChill Ultimate – 25/25Mbps	R 748
FibreVibe Ultimate – 50/50Mbps	R 868
FibreBold Ultimate – 100/100Mbps	R 988
FibreStyle Ultimate – 200/200Mbps	R 1 098

Source: ICASA Database Based on Tariff Notifications

The Cipherwave on Mesh Telecom FTTH plan was made available on the market on 01 October 2021.

2.7.2.20. Ibits Internet on Frogfoot FTTH

Ibits Internet filed its FTTH on the Frogfoot network with the Authority on 21 October 2021. The Ibits Internet on Frogfoot FTTH offers customers FTTH packages ranging from 30/30Mbps to 1000/1000Mbps. Table 76 below sets out the packages and prices available on Ibits Internet on Frogfoot FTTH plan.

Table 76: Ibits Internet on Frogfoot FTTH

Product Description	Price
30/30Mbps	R 549
50/50Mbps	R 649
100/100Mbps	R 749
200/200Mbps	R 849
500/500Mbps	R 1 149
1000/1000Mbps	R 1 349

Source: ICASA Database Based on Tariff Notifications

The Ibits Internet on Frogfoot 100/100Mbps priced at R 749 can be compared to the Amobia on Frogfoot 100/100Mbps⁴⁰ priced at R 835 or 11.5% more. The Ibits Internet on Frogfoot FTTH plan was launched on the market on 01 November 2021.

⁴⁰ Page 90, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/tariffs-analysis-report-01-jan-to-30-jun-2021> > Accessed on 14 January 2022

2.7.2.21. MWEB on Frogfoot AIR

MWEB filed the Frogfoot AIR with the Authority on 22 October 2021. The MWEB on Frogfoot AIR offers customers two FTTH packages of 10/1Mbps and 20/2Mbps. Table 77 below sets out the prices and packages available on MWEB on Frogfoot AIR plan.

Table 77: MWEB on Frogfoot AIR

Product Description	Price
10/1Mbps	R 309
20/2Mbps	R 439

Source: ICASA Database Based on Tariff Notifications

The MWEB on Frogfoot AIR 20/2Mbps can be compared to the MWEB on Frogfoot Uncapped Fibre 20/2Mbps priced at R 699 or 59.2% more. The MWEB on Frogfoot AIR plan was launched in the market on 02 November 2021.

2.7.2.22. Amobia on Century City/Oasis FTTH

Amobia filed amendments to its Amobia on Century City/Oasis FTTH with the Authority on 18 November 2021. The amendment entailed the termination, introduction and price reductions of certain packages. Table 78 below details the terminated, new packages and price reductions on the Amobia on Century City/Oasis FTTH plan.

Table 78: Amobia on Century City/Oasis FTTH

Current Package	Previous Price	Current Price	Price Difference	Variance (%)
10/5Mbps	R 505	R 495	-R 10	-2%
20/10Mbps	R 710	R 635	-R 75	-10.6%
50/25Mbps	R 850	R 785	-R 65	-7.6%
100/50Mbps	R 1 200	R 950	-R 250	-20.8%
200/10Mbps	N/A	R 1 100	N/A	N/A
Terminated Packages				
5/2.5Mbps + 150GB				
10/5Mbps + 150GB				
20/10Mbps + 150GB				
50/25Mbps + 150GB				
100/50Mbps + 150GB				

Source: ICASA Database Based on Tariff Notifications

The largest price decrease in absolute value and percentage terms of R 250 or 20.8% occurred on the Amobia on Century City/Oasis 100/50Mbps. The Amobia on Century City/Oasis 20/10Mbps priced at R 635 is comparable to the MWEB on Century City Connect Uncapped 20/10Mbps priced at R 639 or 0.6% more. The amendment on the Amobia on Century City/Oasis FTTH plan became effective on 01 December 2021.

2.7.2.23. Amobia on Buh-Rein FTTH

Amobia filed an amendment to its FTTH packages on the Buh-Rein network with the Authority on 18 November 2021. The amendments entailed an upgrade of line speeds, a decrease in prices, the termination and introduction of certain fibre packages on the Amobia on Buh-Rein FTTH plan. Table 79 below sets out the price increases across the affected Amobia on Buh-Rein FTTH packages.

Table 79: Amobia on Buh-Rein FTTH

18 November 2021					
Current Package	New package	Previous Price	Current Price	Price Difference	Variance (%)
Buh-Rein 15/7Mbps	Amobia 30/15Mbps	R 445	R 505	R 60	13.5%

Source: ICASA Database Based on Tariff Notifications

Customers benefit from the doubling of line speed on the Amobia on Buh-Rein FTTH package from 15/7Mbps to 30/15Mbps, although it was accompanied by a price increase of 13.5%. The remaining packages on Amobia on Buh-Rein FTTH remained unchanged. The amendment of the Amobia on Buh-Rein FTTH plan became effective on 01 December 2021.

2.7.2.24. MWEB on Lightstruck FTTH

MWEB filed an amendment of the Lightstruck FTTH with the Authority on 22 November 2021. The amendment entailed price increases across all packages on the MWEB on Lightstruck FTTH plan. Table 80 below details the price increases that occurred on the MWEB on Lightstruck FTTH plan.

Table 80: MWEB on Lightstruck FTTH

Product	Previous Price	Current Price	Price Difference	Variance (%)
Uncapped 20/20Mbps	R 679	R 699	R 20	2.9%
Uncapped 50/50Mbps	R 899	R 929	R 30	3.3%
Uncapped 100/100Mbps	R 1 049	R 1 099	R 50	4.8%
Uncapped 200/200Mbps	R 1 179	R 1 219	R 40	3.4%
Uncapped 500/500Mbps	R 1 399	R 1 449	R 50	3.6%
Uncapped 1/1Gbps	R 1 899	R 1 949	R 50	2.6%

Source: ICASA Database Based on Tariff Notifications

The largest increase on the MWEB on Lightstruck FTTH plan in percentage terms of 4.8% occurred on the Uncapped 100/100Mbps package. The MWEB on Lightstruck FTTH 50/50Mbps package priced at R 929 can be compared to the Cybersmart on Lightstruck Uncapped Fibre 50/50Mbps analysed in the 2020/21 FY Q4 Bi-annual Tariff Analysis Report⁴¹ priced at R 829, which is R 100 (or 10.8%) less. The amendment of the MWEB on Lightstruck FTTH plan became effective on 01 December 2021.

2.7.3. Promotional FTTH Plans

2.7.3.1. Telkom 500Mbps Home Unlimited Premium Promotion

Telkom filed the 500Mbps Home Unlimited Premium Promotion with the Authority on 24 November 2021. The Telkom 500Mbps Home Unlimited Premium Promotion will be available for 6 months and will allow Telkom customers on the 200Mbps Home Unlimited Premium to upgrade to the 500Mbps Home Unlimited Premium at the same price as the 200Mbps. Table 81 below details the two Telkom 200Mbps and 500Mbps packages.

Table 81: Telkom 200Mbps and 500Mbps Home Unlimited Premium Promotion

Package	Price
200Mbps Unlimited Home Premium (existing product)	R 1 399
500Mbps Unlimited Home Premium	R 1 399

Source: ICASA Database Based on Tariff Notifications

⁴¹ Page 75, 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 14 January 2022

The Telkom 500Mbps Unlimited Home Premium promotion can be compared to the Cell C on Frogfoot Fibre Plan C-Fibre 500/500Mbps analysed in the 2021/22 FY Q2 Bi-annual Tariff Analysis Report⁴² priced at R 1 399. The Telkom 500Mbps Unlimited Home Premium promotion was launched on the market on 03 December 2021 and will be available for a period of 6 months.

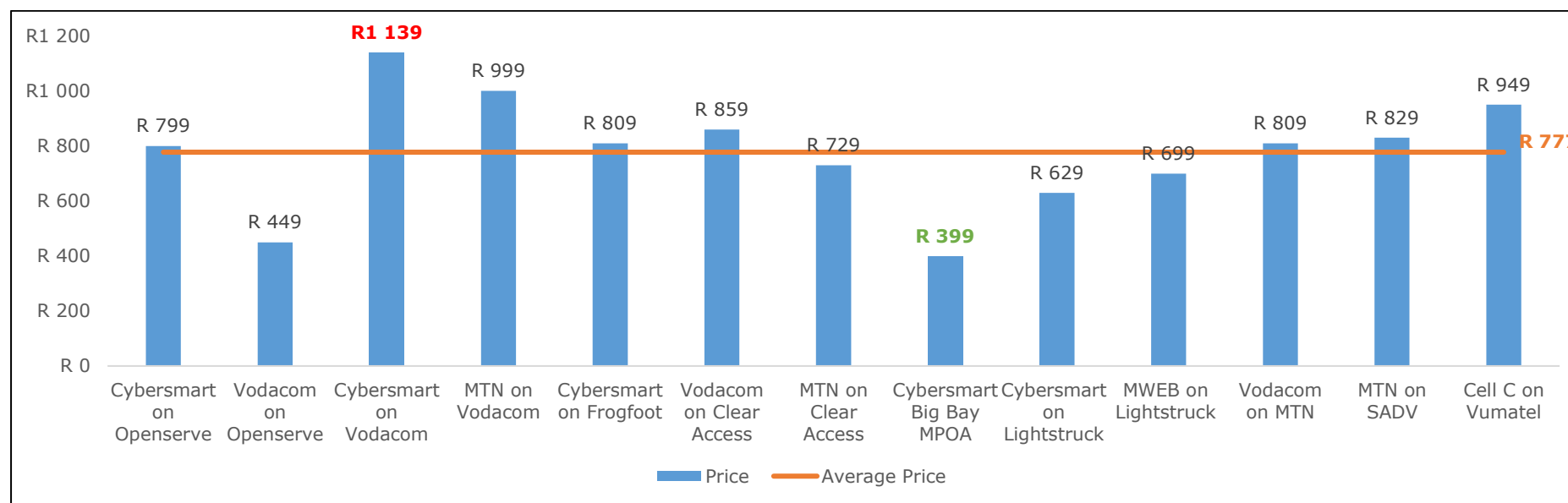
⁴² Page 89, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/tariffs-analysis-report-01-jan-to-30-jun-2021> > Accessed on 14 January 2022

2.7.4. Comparative Analysis of Fibre Products

This sub-section provides a comparative analysis of FTTH packages provided on 3rd party FNOs. It aims to show how different ISPs price their packages of the same line speeds and shows the average market price, based on ICASA's tariff notifications database, which is formulated from information received from tariff notifications.

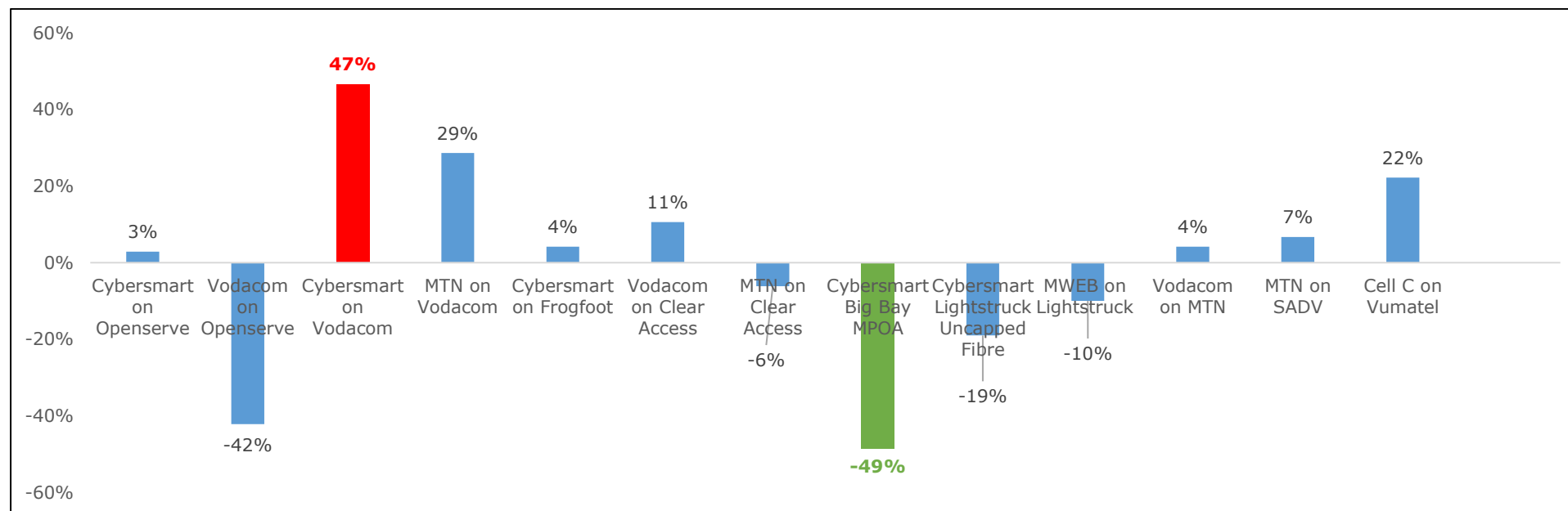
2.7.4.1. 20/20Mbps FTTH on Various Networks

Figure 6: 20/20Mbps Packages offered by 3rd party FNOs on Various Network



Source: ICASA Database Based on Tariff Notifications

Figure 7: Percentage Deviation from the 20/20Mbps Average Price

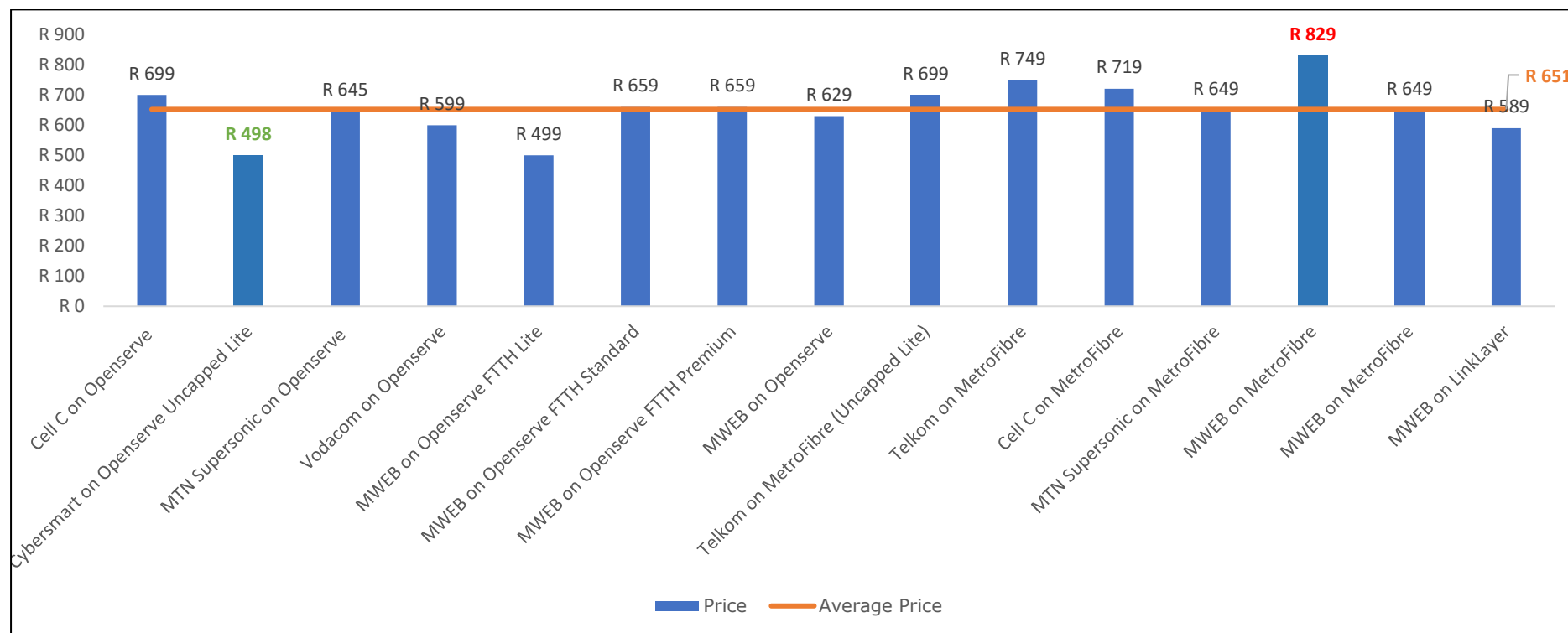


Source: ICASA Database Based on Tariff Notifications

- Figure 6 above shows that the average price of the sampled 20/20Mbps line speeds is approximately priced at R 777 per month, while figure 7 shows the percentage deviation of the various 20/20Mbps packages from the average price.
- Cybersmart's 20/20Mbps on Vodacom has the highest subscription fee of R 1 139, which is 47 % more than the average price.
- Cybersmart's 20/20Mbps in the Big Bay MPOA residential area has the lowest subscription fee of R 399, which is 49% less than the average price.
- Vodacom's 20/20Mbps on Openserve is also reasonably priced at R 449, which is 42% lower than the average price.

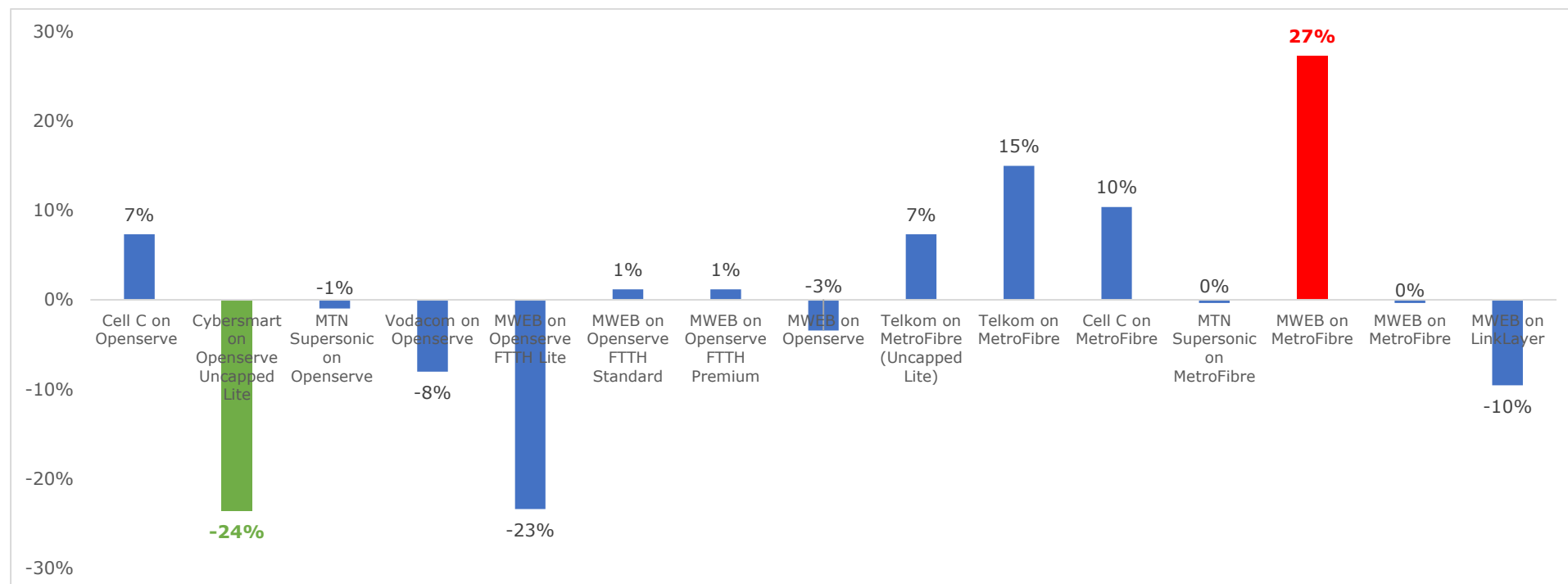
2.7.4.2. 25/25Mbps FTTH on Various Networks

Figure 8: 25/25Mbps Packages offered by 3rd party FNOs on Various Networks



Source: ICASA Database Based on Tariff Notifications

Figure 9: Percentage Deviation from the 25/25Mbps Average Price



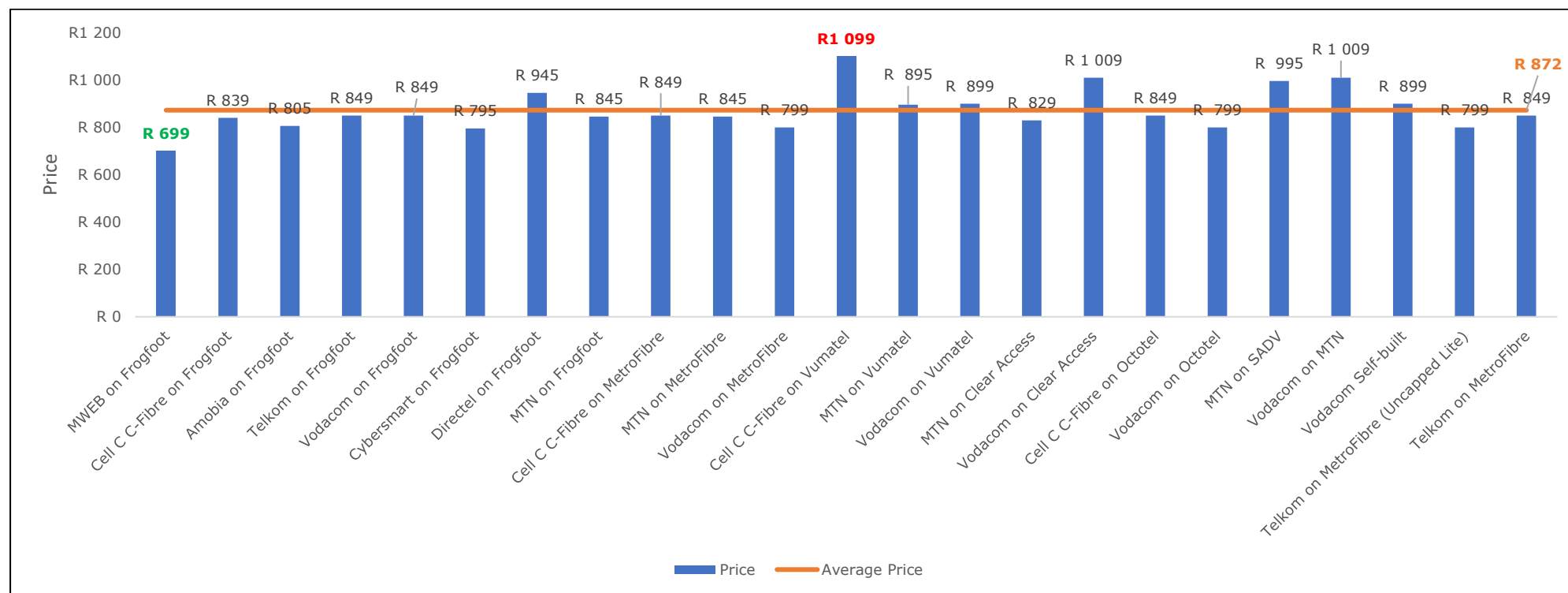
Source: ICASA Database Based on Tariff Notifications

- The sample approximates that the average subscription fee of the 25/25Mbps line speed at R 651, as shown in figure 8 above.
- In terms of standard plans, Cybersmart's 25/25Mbps FTTH on the Openserve network has the lowest subscription fee of R 498 which translates to the largest below average price deviation of 24%.
- MWEB's 25/25Mbps FTTH (Lite) on MetroFibre's network has the highest subscription fee of R 829, which translates to the largest deviation above the average price of 27%.

- It is worth noting that 6 out of 15, of the 25/25Mbps FTTH plans offered by the 3rd party FNOs in the sample charge prices which are below the average price , with 2 being more than 10% lower.

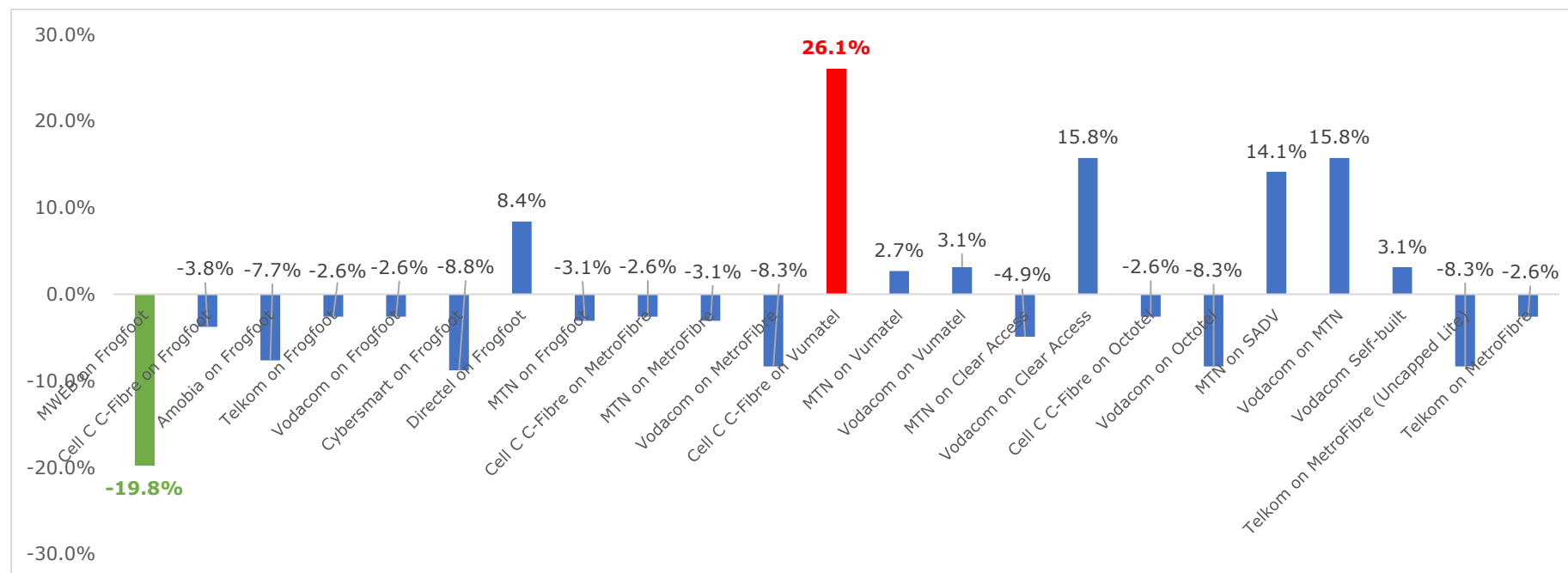
2.7.4.3. 50/50Mbps FTTH on Various Networks

Figure 10: 50/50Mbps Packages offered on Various Fibre Networks



Source: ICASA Database Based on Tariff Notifications

Figure 11: Percentage Deviation from the 50/50Mbps Average Price

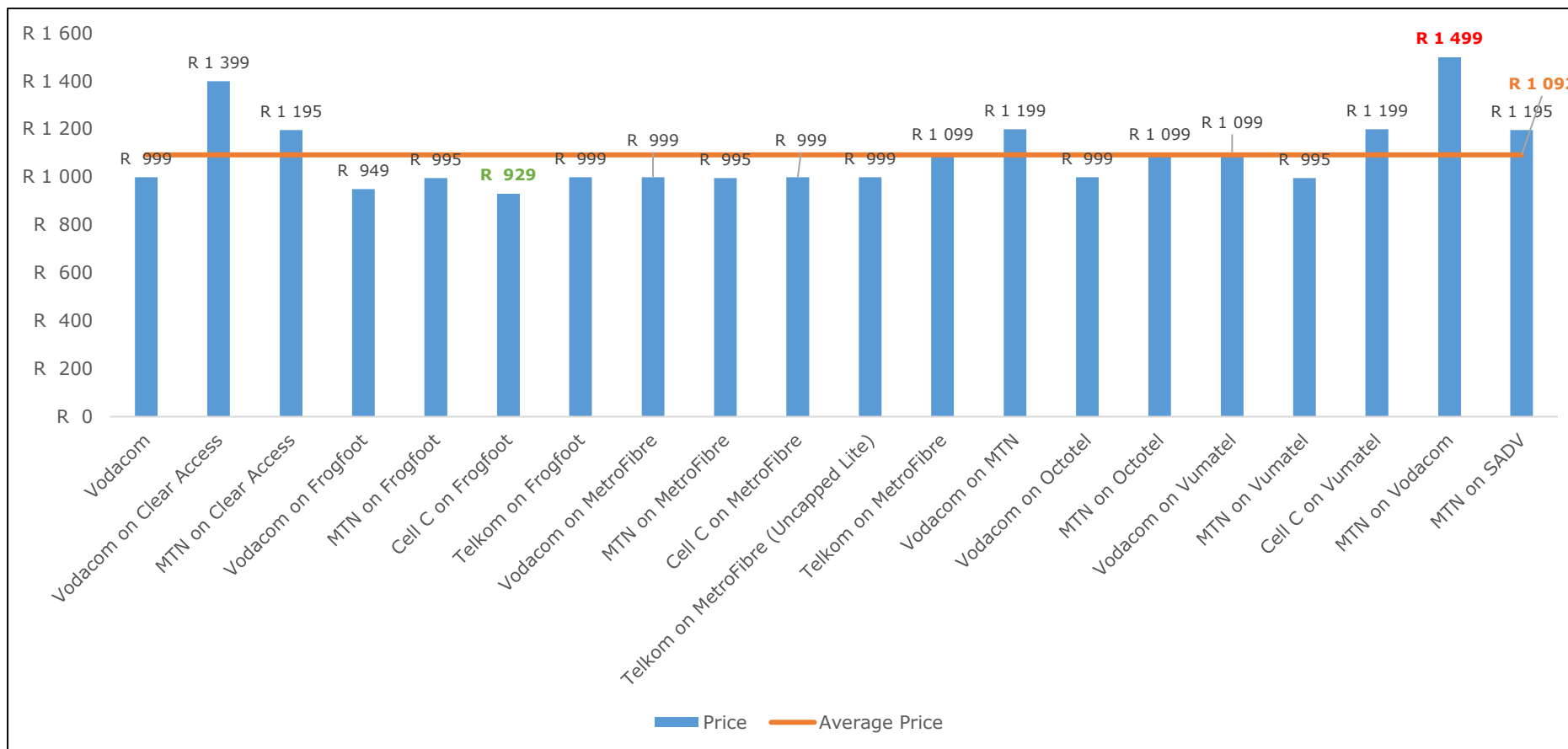


Source: ICASA Database Based on Tariff Notifications

- The sample approximates the average subscription fee of the 50/50Mbps line speed at R 872 per month, as shown on figure 10.
- The cheapest price for 50/50Mbps FTTH on the Frogfoot network is MWEB's priced at R 699, which is 19.8% below the estimated average price.
- Cell C's 50/50Mbps FTTH on Vumatel's network has the highest subscription fee of R 1 099 which translates to the largest deviation of 26.1% above the average price.
- Figure 11 above shows that 8 out of 23 operators providing fibre services charge above the average price.

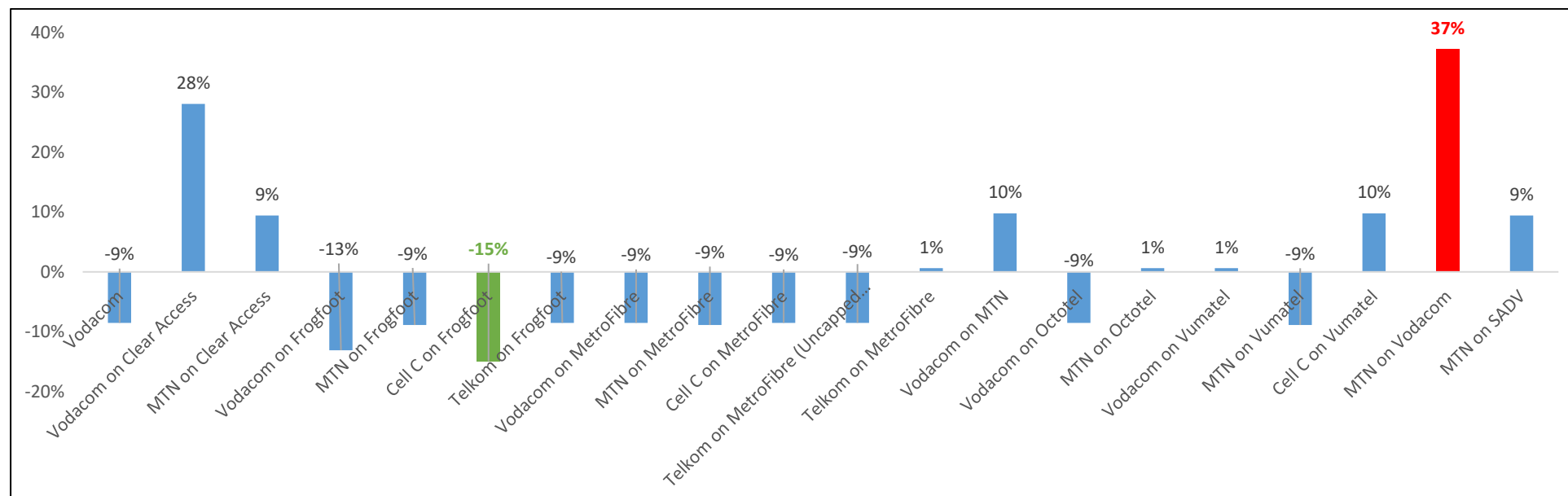
2.7.4.4. 100/100Mbps FTTH on Various Networks

Figure 12: 100/100Mbps Packages offered by 3rd party FNOs on Various Networks



Source: ICASA Database Based on Tariff Notifications

Figure 13: Percentage Deviation from the 100/100Mbps Average Price



Source: ICASA Database Based on Tariff Notifications

- The sample approximates the average subscription fee of the 100/100Mbps line speed at R 1 092 per month.
- MTN's 100/100Mbps FTTH on Vodacom's network has the highest subscription fee of R 1 499 which translates to the largest deviation from the average price of 37% more.
- Cell C has the lowest subscription fee on its 100/100Mbps package on the Frogfoot network at R 929, which is 15% less than the average price.
- It is worth noting that most (i.e., 11 out of 20) of the 100/100Mbps FTTH packages offered by 3rd party FNOs shown in the sample charge below the average price.

3. Conclusion

The Authority observed increased competitiveness between licensees in terms of the number of promotions that were offered in the market, during the period under review. The promotional offers increased by 49 notifications from preceding reporting period, from 24 to 73 new promotions launched. The Authority also received 26 extensions of existing promotions. The increased number of promotional offers is seen as a strategic tool to incentivise, reward (loyal customers), attract new customers and to alleviate the financial burden brought by the pandemic by providing more affordable access to digital services. The extensions and/or amendments of previous promotions could also be an indication of customers' positive reaction towards promotional offers.

The Authority continues to observe data price reductions with various amendments filed by licensees. In the period under review, all four major MNOs reduced the prices of their respective 30-day standard prepaid data bundles. For example, Cell C reduced the price of its 1GB data bundle by 10.5% from R 95 to R 85. The 10.5% price reduction of Cell C's 1GB data bundle has positively contributed to a reduced average price of the 1GB data bundle which is currently at R 83.50, however it should be noted that Telkom Mobile offers the most affordable 30-day standard prepaid 1GB data bundle priced at R 79. Vodacom's price reduction of the 2GB data bundle from R 159 to R 149 resulted in an average price of R 147 on the 30-day standard prepaid 2GB data bundle. Other positive amendments in the data services market include the reintroduction of Cell C's 500MB data bundle priced at R 45, making it the most affordable 30-day standard prepaid 500MB data bundle currently offered in the market.

The Authority received eight notifications from various licensees regarding voice bundles. For example, on 29 September 2021, MTN filed its new Bozza Talk Bundles wherein it offers customers personalised voice bundles with effective rates ranging from R 0.01 to R 0.08 per minute. Therefore, customers on the MTN Ska Wara Bundle Bonanza price plan, for example, can save at least R 0.91 per minute on call when purchasing the personalised Bozza Talk Bundles as opposed to using OOB rates which charges a flat-rate of R 0.99 per minute. Faced with increased

usage of Internet services, this is viewed by the Authority as an indication of the operator's efforts to increase the utilisation of voice services by customers. On the other hand, Cell C increased the flat rates on the MegaBonus and UltraBonus tariff plans from R 1.72 and R 2, both to R 2.50 per minute, respectively. The increase in Cell C's voice rates is concerning given the Authority's efforts to reduce costs to communicate through various initiatives including reduced call termination rates.

The Authority also observed an increase in the provision of LTE and Wireless Internet services, the introduction of 5G products and wireless fibre Internet. For instance, MTN introduced new MyMTN Home Uncapped F-LTE and MyMTN Home Uncapped 5G price plans in the market, wherein it offers high speed wireless Internet services. For example, the MyMTN Home Uncapped F-LTE 20Mbps is offered to customers for R 699 on a MtM basis, subject to 600GB FUP. The wireless Internet services serve as an alternative to fixed broadband services, especially in areas where there is no fibre footprint.

FNOs and ISPs continue to introduce new and/or amend previous fibre services in the market which the Authority perceives as beneficial to the public in terms of increased product choice and may ultimately result in competitive pricing. For example, Vodacom amended its fibre plan, wherein it decreased the prices of selected fibre packages. For example, Vodacom's 50/50Mbps fibre package on the MetroFibre network realised a R 208.76 or 20.7% tariff decrease from R 1 007.76 to R 799. It should be noted that the Authority received a total of 79 notifications regarding fibre services (up from 50 in the preceding reporting period) from various FNOs in the period under review. The FTTH comparative analysis shows that the average prices for the 20/20Mbps, 25/25Mbps, 50/50Mbps and 100/100Mbps are approximately, R 777, R 636, R 872 and R 1 092, respectively.

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]

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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 Other⁴³ Tariff Notifications Filed During the Period Under Review

TARIFF PLAN	EXPLANATION OF THE TARIFF PLAN	RELEVANT DATES	PRICING/PRODUCT/PACKAGE INFORMATION	STATUS																																																																																																														
Cell C C-Fibre Promotion	The Cell C C-Fibre Promotion offers customers FTTH packages on the Vumatel, Openserve, Frogfoot, MetroFibre and Octotel networks.	<p>Filed: 01 July 2021</p> <p>Launch Date: 03 July 2021</p> <p>Extension Date(s): 21 September 2021</p> <p>Decommission Date: 31 January 2022</p>	<p><i>Table 82: Cell C C-Fibre Promotion</i></p> <table> <tr> <th colspan="5">Vumatel</th></tr> <tr> <th>Product Description</th><th>Previous Price</th><th>Current Price</th><th>Price Difference</th><th>Variance (%)</th></tr> <tr> <td>C-Fibre 20/10Mbps</td><td>R 799</td><td>R 695.13</td><td>-R 103.87</td><td>-13%</td></tr> <tr> <td>C-Fibre 50/5Mbps</td><td>R 949</td><td>R 844.61</td><td>-R 104.39</td><td>-11%</td></tr> <tr> <td>C-Fibre 100/100Mbps</td><td>R 1 099</td><td>R 989.10</td><td>-R 109.90</td><td>-10%</td></tr> <tr> <td>C-Fibre 200/200Mbps</td><td>R 1 299</td><td>R 1 156.11</td><td>-R 142.89</td><td>-11%</td></tr> <tr> <th colspan="5">Openserve</th></tr> <tr> <td>C-Fibre 50/25Mbps</td><td>R 699</td><td>R 615.12</td><td>-R 83.88</td><td>-12%</td></tr> <tr> <td>C-Fibre 100/50Mbps</td><td>R 799</td><td>R 719.10</td><td>-R 79.90</td><td>-10%</td></tr> <tr> <td>C-Fibre 200/100Mbps</td><td>R 949</td><td>R 899</td><td>-R 50</td><td>-5.3%</td></tr> <tr> <th colspan="5">Frogfoot</th></tr> <tr> <td>C-Fibre 30/30Mbps</td><td>R 729</td><td>R 648.81</td><td>-R 80.19</td><td>-11%</td></tr> <tr> <td>C-Fibre 50/50Mbps</td><td>R 839</td><td>R 713.15</td><td>-R 125.85</td><td>-15%</td></tr> <tr> <td>C-Fibre 100/100Mbps</td><td>R 929</td><td>R 836.10</td><td>-R 92.90</td><td>-10%</td></tr> <tr> <th colspan="5">MetroFibre</th></tr> <tr> <td>C-Fibre 30/30Mbps</td><td>R 719</td><td>R 632.72</td><td>-R 86.28</td><td>-12%</td></tr> <tr> <td>C-Fibre 50/50Mbps</td><td>R 849</td><td>R 755.61</td><td>-R 93.39</td><td>-11%</td></tr> <tr> <td>C-Fibre 100/100Mbps</td><td>R 999</td><td>R 899.10</td><td>-R 99.90</td><td>-10%</td></tr> <tr> <th colspan="5">Octotel</th></tr> <tr> <td>C-Fibre 30/25Mbps</td><td>R 729</td><td>R 641.52</td><td>-R 87.48</td><td>-12%</td></tr> <tr> <td>C-Fibre 50/50Mbps</td><td>R 849</td><td>R 764.10</td><td>-R 84.90</td><td>-10%</td></tr> <tr> <td>C-Fibre 100/100Mbps</td><td>R 1 099</td><td>R 956.13</td><td>-R 142.87</td><td>-13%</td></tr> </table> <p><i>Source: ICASA Database based on Tariff Notifications</i></p>	Vumatel					Product Description	Previous Price	Current Price	Price Difference	Variance (%)	C-Fibre 20/10Mbps	R 799	R 695.13	-R 103.87	-13%	C-Fibre 50/5Mbps	R 949	R 844.61	-R 104.39	-11%	C-Fibre 100/100Mbps	R 1 099	R 989.10	-R 109.90	-10%	C-Fibre 200/200Mbps	R 1 299	R 1 156.11	-R 142.89	-11%	Openserve					C-Fibre 50/25Mbps	R 699	R 615.12	-R 83.88	-12%	C-Fibre 100/50Mbps	R 799	R 719.10	-R 79.90	-10%	C-Fibre 200/100Mbps	R 949	R 899	-R 50	-5.3%	Frogfoot					C-Fibre 30/30Mbps	R 729	R 648.81	-R 80.19	-11%	C-Fibre 50/50Mbps	R 839	R 713.15	-R 125.85	-15%	C-Fibre 100/100Mbps	R 929	R 836.10	-R 92.90	-10%	MetroFibre					C-Fibre 30/30Mbps	R 719	R 632.72	-R 86.28	-12%	C-Fibre 50/50Mbps	R 849	R 755.61	-R 93.39	-11%	C-Fibre 100/100Mbps	R 999	R 899.10	-R 99.90	-10%	Octotel					C-Fibre 30/25Mbps	R 729	R 641.52	-R 87.48	-12%	C-Fibre 50/50Mbps	R 849	R 764.10	-R 84.90	-10%	C-Fibre 100/100Mbps	R 1 099	R 956.13	-R 142.87	-13%	Ongoing as at 31 December 2021 and was expected to be decommissioned on 30 October 2021. However, Cell C filed an extension on 21 September 2021, extending the promotion to 31 January 2022, which will be discussed in the next reporting period.
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⁴³ Other tariff notifications filed or received during the period under review that were in existence as at end of 31 December 2021 which were not discussed/mentioned in the main part of this report

MTN Prepaid E-rate	MTN provides a prepaid e-rate service which is available for schools.	Filed: 15 July 2021 Launch Date: 26 July 2021	The prepaid e-rate service depletes data from airtime. The data depletion rate for the e-rate service was amended from R 0.14 per MB to R 0.03 per MB.	Ongoing as at 31 December 2021.
Cell C Socializa Bundles Promotion	The Cell C Socializa Bundles Promotion offers customers data that can be used exclusively to access specific social media and/or streaming media platforms.	Filed: 11 November 2020 Launch Date: 13 November 2020 Extension Date(s): 20 July 2021, 17 September 2021, 18 January 2022 Decommission Date: 30 April 2022	Cell C's Socializa Bundles Promotion was analysed in the 2021/22 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/tariffs-analysis-report-01-jan-to-30-jun-2021 >	Ongoing as at 31 December 2021 and was expected to be decommissioned on 31 January 2022. However, Cell C filed another extension on 18 January 2022, extending the promotion to 30 April 2022, which will be discussed in the next reporting period.
Cell C Socializa	The Cell C Socializa Bundles Promotion offers customers	Filed: 11 November 2020	Cell C's Socializa Bundles Promotion was analysed in the 2021/22 FY Q2 Bi-annual Tariff Analysis Report which can be found on the Authority's website on the link below:	Ongoing as at 31 December 2021 and was expected

Bundles Promotion	data that can be used exclusively to access specific social media and/or streaming media platforms.	<p>Launch Date: 13 November 2020</p> <p>Extension Date(s): 20 July 2021, 17 September 2021, 18 January 2022</p> <p>Decommission Date: 30 April 2022</p>	<https://www.icasa.org.za/legislation-and-regulations/tariffs-analysis-report-01-jan-to-30-jun-2021>	to be decommissioned on 31 January 2022. However, Cell C filed another extension on 18 January 2022, extending the promotion to 30 April 2022, which will be discussed in the next reporting period.
Vodacom Fibre Broadband Promotions	The promotions offered free service subscription for new fibre customers.	<p>Filed: 23 July 2021</p> <p>Launch Date: 03 August 2021</p> <p>Decommission Date: 31 January 2022</p>	<p>Vodacom offered free service subscription for new fibre customers on the following plans:</p> <ul style="list-style-type: none"> • CDP Rentals • While you Wait (LTE Interim) 	Ongoing as at 31 December 2021, however it was decommissioned on 31 January 2022.

Cell C Recharge Enhancer Promotion	The promotion awarded eligible Cell C customers with free data or on-net minutes based on the effective recharge value utilised by the customer. Customers qualify for one or multiple rewards during the promotion period.	Filed: 20 August 2021 Launch Date: 21 August 2021 Decommission Date: 22 February 2022	<p>Table 83: Cell C Recharge Enhancer Promotion</p> <table><thead><tr><th>Reward offer</th><th>Price</th><th>Validity</th></tr></thead><tbody><tr><td>20MB</td><td>R 5</td><td>24 Hours</td></tr><tr><td>40MB</td><td>R 10</td><td>24 Hours</td></tr><tr><td>70MB</td><td>R 15</td><td>24 Hours</td></tr><tr><td>100MB</td><td>R 20</td><td>24 Hours</td></tr><tr><td>2 On-net minutes</td><td>R 5</td><td>24 Hours</td></tr><tr><td>5 On-net minutes</td><td>R 10</td><td>24 Hours</td></tr><tr><td>15 On-net minutes</td><td>R 15</td><td>24 Hours</td></tr><tr><td>20 On-net minutes</td><td>R 20</td><td>24 Hours</td></tr><tr><td>40MB</td><td>R 5</td><td>2 Days</td></tr><tr><td>80MB</td><td>R 10</td><td>2 Days</td></tr><tr><td>140MB</td><td>R 15</td><td>2 Days</td></tr><tr><td>200MB</td><td>R 20</td><td>2 Days</td></tr><tr><td>4 On-net minutes</td><td>R 5</td><td>2 Days</td></tr><tr><td>10 On-net minutes</td><td>R 10</td><td>2 Days</td></tr><tr><td>30 On-net minutes</td><td>R 15</td><td>2 Days</td></tr><tr><td>40 On-net minutes</td><td>R 20</td><td>2 Days</td></tr></tbody></table> <table><tbody><tr><td rowspan="3">Subscriber Action Offer Validity</td><td>R 10</td></tr><tr><td>60MB</td></tr><tr><td>2 Days</td></tr></tbody></table> <p>Source: ICASA Database based on Tariff Notifications</p>	Reward offer	Price	Validity	20MB	R 5	24 Hours	40MB	R 10	24 Hours	70MB	R 15	24 Hours	100MB	R 20	24 Hours	2 On-net minutes	R 5	24 Hours	5 On-net minutes	R 10	24 Hours	15 On-net minutes	R 15	24 Hours	20 On-net minutes	R 20	24 Hours	40MB	R 5	2 Days	80MB	R 10	2 Days	140MB	R 15	2 Days	200MB	R 20	2 Days	4 On-net minutes	R 5	2 Days	10 On-net minutes	R 10	2 Days	30 On-net minutes	R 15	2 Days	40 On-net minutes	R 20	2 Days	Subscriber Action Offer Validity	R 10	60MB	2 Days	Ongoing as at 31 December 2021, however it will be decommissioned on 22 February 2022.
Reward offer	Price	Validity																																																									
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Subscriber Action Offer Validity	R 10																																																										
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	2 Days																																																										
MWEB on Openserve FTTH Promotion	The 25/25Mbps FTTH package was to assist customers whose ADSL service was going to be ended in	Filed: 20 August 2021	<p>Table 84: MWEB on Openserve FTTH</p> <table><thead><tr><th>Description</th><th>Price</th></tr></thead><tbody><tr><td>25/25Mbps Uncapped</td><td>R 399</td></tr></tbody></table> <p>Source: ICASA Database based on Tariff Notifications</p>	Description	Price	25/25Mbps Uncapped	R 399	Ongoing as at 31 December 2021, however it will be decommissioned in February 2022.																																																			
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25/25Mbps Uncapped	R 399																																																										

	certain suburbs. The promotion was available for 6 months only, thereafter customers are charged R 499 per month.	Launch Date: 24 August 2021 Decommission Date: February 2022																																																								
Vodacom Ticket	The amendment to the Vodacom Ticket entails a revision of the terms and conditions applicable to price plan migrations.	Filed: 12 January 2018 Launch Date: 24 January 2018 Amendment Date: 27 August 2021	<p><i>Table 85: Vodacom's Amendment to the Ticket Migration Rule</i></p> <table><tr><th colspan="2">Vodacom Ticket</th></tr><tr><th>Previous Terms and Conditions</th><th>Current Terms and Conditions</th></tr><tr><td><ul style="list-style-type: none">If customers do a price plan migration, whilst they have an existing active Service, such Service shall be carried over to the new price plan.</td><td><ul style="list-style-type: none">If customers do an <i>upward</i> price plan migration, whilst having an existing recurring active service, such service shall be carried over to the new price plan.If customers do a <i>downward</i> price plan migration, whilst having an existing recurring active service, such service will be forfeited.</td></tr></table> <p><i>Source: ICASA Database based on Tariff Notifications</i></p>	Vodacom Ticket		Previous Terms and Conditions	Current Terms and Conditions	<ul style="list-style-type: none">If customers do a price plan migration, whilst they have an existing active Service, such Service shall be carried over to the new price plan.	<ul style="list-style-type: none">If customers do an <i>upward</i> price plan migration, whilst having an existing recurring active service, such service shall be carried over to the new price plan.If customers do a <i>downward</i> price plan migration, whilst having an existing recurring active service, such service will be forfeited.	Ongoing as at 31 December 2021.																																																
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Telkom DSL and FTTx Promotion	The Telkom DSL and FTTx Promotion offers customers discounted prices on FTTx bundles for customers residing in the Openserve copper and FTTx network.	Filed: 03 March 2021 Launch Date: 05 March 2021	<p><i>Table 86: Telkom DSL and FTT Promotion</i></p> <table><tr><th colspan="6">FTTx Unlimited Home Lite</th></tr><tr><th>Previous Line Speed</th><th>Current Line Speed</th><th>Normal Price</th><th>Promotion Price</th><th>Price Difference</th><th>Variance (%)</th></tr><tr><td>10Mbps</td><td>25Mbps</td><td>R 649</td><td>R 449</td><td>-R 200</td><td>-30.8%</td></tr><tr><td>20Mbps</td><td>50Mbps</td><td>R 899</td><td>R 699</td><td>-R 200</td><td>-22.2%</td></tr><tr><th colspan="6">FTTx Unlimited Home Premium</th></tr><tr><td>10Mbps</td><td>25Mbps</td><td>R 799</td><td>R 699</td><td>-R 100</td><td>-12.5%</td></tr><tr><td>20Mbps</td><td>50Mbps</td><td>R 999</td><td>R 849</td><td>-R 150</td><td>-15%</td></tr><tr><th colspan="6">DSL Unlimited Home Lite</th></tr><tr><th>Previous Line Speed</th><th>Current Line Speed</th><th>Price (1st 6 months)</th><th>Price (after the 1st 6 months)</th><th>Price Difference</th><th>Variance (%)</th></tr></table>	FTTx Unlimited Home Lite						Previous Line Speed	Current Line Speed	Normal Price	Promotion Price	Price Difference	Variance (%)	10Mbps	25Mbps	R 649	R 449	-R 200	-30.8%	20Mbps	50Mbps	R 899	R 699	-R 200	-22.2%	FTTx Unlimited Home Premium						10Mbps	25Mbps	R 799	R 699	-R 100	-12.5%	20Mbps	50Mbps	R 999	R 849	-R 150	-15%	DSL Unlimited Home Lite						Previous Line Speed	Current Line Speed	Price (1st 6 months)	Price (after the 1st 6 months)	Price Difference	Variance (%)	Ongoing as at 31 December 2021, however it will be decommissioned on 31 March 2022.
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Previous Line Speed	Current Line Speed	Price (1st 6 months)	Price (after the 1st 6 months)	Price Difference	Variance (%)																																																					

		Extension Date(s): 30 August 2021 Decommission Date: 31 March 2022	<table><tr><td>5Mbps</td><td>N/A</td><td>R 199</td><td>R 329</td><td>R 130</td><td>65.3%</td></tr><tr><td>10Mbps</td><td>N/A</td><td>R 299</td><td>R 599</td><td>R 300</td><td>100.3%</td></tr><tr><td colspan="6">DSL Home Premium</td></tr><tr><td>5Mbps</td><td>N/A</td><td>R 399</td><td>R 499</td><td>R 100</td><td>25.1%</td></tr><tr><td>10Mbps</td><td>N/A</td><td>R 499</td><td>R 699</td><td>R 200</td><td>40.1%</td></tr></table> <p>Source: ICASA Database based on Tariff Notifications</p>	5Mbps	N/A	R 199	R 329	R 130	65.3%	10Mbps	N/A	R 299	R 599	R 300	100.3%	DSL Home Premium						5Mbps	N/A	R 399	R 499	R 100	25.1%	10Mbps	N/A	R 499	R 699	R 200	40.1%	
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Telkom Summer of Monate Promotion	The Telkom Summer of Monate Promotion entailed prepaid data bundles ranging from 500MB to 2GB.	Filed: 03 September 2021 Launch Date: 20 September 2021 Decommission Date: 19 January 2022	<p>Table 87: Telkom Summer of Monate Promotion</p> <table><tr><th>Description (Daily data)</th><th>Price</th></tr><tr><td>500MB</td><td>R 15</td></tr><tr><td>1GB</td><td>R 29</td></tr><tr><td>2GB</td><td>R 49</td></tr></table> <p>Source: ICASA Database based on Tariff Notifications</p>	Description (Daily data)	Price	500MB	R 15	1GB	R 29	2GB	R 49	Ongoing as at 31 December 2021, however it was decommissioned in 19 January 2022.																						
Description (Daily data)	Price																																	
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2GB	R 49																																	
Vodacom Everyday-ta Promotion	Vodacom’s Everyday-ta Promotion offered customers promotional single-purchase daily	Filed: 06 September 2021 Launch Date: 16 September 2021	<p>Table 88: Vodacom Everyday-ta Promotion</p> <table><tr><th>Daily Allocation</th><th>Once-off allocation</th><th>Recurrence</th><th>Price</th></tr><tr><td>175MB</td><td>2.6GB Night Owl (valid for 14 days)</td><td>14 days</td><td>R 49</td></tr><tr><td>250MB</td><td>7.5GB Night Owl (valid for 30 days)</td><td>30 days</td><td>R 99</td></tr><tr><td>500MB</td><td>15GB Night Owl (valid for 30 days)</td><td>30 days</td><td>R 169</td></tr><tr><td>1GB</td><td>30GB Night Owl (valid for 30 days)</td><td>30 days</td><td>R 299</td></tr></table>	Daily Allocation	Once-off allocation	Recurrence	Price	175MB	2.6GB Night Owl (valid for 14 days)	14 days	R 49	250MB	7.5GB Night Owl (valid for 30 days)	30 days	R 99	500MB	15GB Night Owl (valid for 30 days)	30 days	R 169	1GB	30GB Night Owl (valid for 30 days)	30 days	R 299	Ongoing as at 31 December 2021, however it was decommissioned on 16 January 2022.										
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	recurring data bundles.	Decommission Date: 16 January 2022	Source: ICASA database based on Tariff Notifications	
Cell C Upfront Payment Bundles and Double Data Promotion	Cell C's Upfront Payment Bundles and Double Data Promo are 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.	Filed: 11 November 2020 Launch Date: 16 November 2020 Extension Date(s): 17 September 2021, 18 January 2022 Decommission Date: 30 April 2022	Cell C's Upfront Payment Bundles and Double Data 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/bi-annual-tariffs-analysis-report-01-jul-to-31-dec-2020	Ongoing as at 31 December 2021 and was expected to be decommissioned on 31 January 2022. However, Cell C filed another extension on 18 January 2022, extending the promotion to 30 April 2022, which will be discussed in the next reporting period
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	Filed: 23 November 2020	Cell C's 50GB for 6 Months Black Friday Promotion was analysed in the 2021/22 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/tariffs-analysis-report-01-jan-to-30-jun-2021 >	Ongoing as at 31 December 2021 and was expected to be decommissioned on 31 January

	days) for a monetary value of R 500.	<p>Launch Date: 27 November 2020</p> <p>Extension Date(s): 17 September 2021, 18 January 2022</p> <p>Decommission Date: 30 April 2022</p>		2022. However, Cell C filed another extension on 18 January 2022, extending the promotion to 30 April 2022, which will be discussed in the next reporting period
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.	<p>Filed: 21 July 2020</p> <p>Launch Date: 31 July 2020</p> <p>Extension Date: 17 September 2021, 18 January 2022</p>	Cell C's 7-Day WhatsApp Boost Bundle Promotion was analysed in the 2021/22 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/tariffs-analysis-report-01-jan-to-30-jun-2021 >	Ongoing as at 31 December 2021 and was expected to be decommissioned on 31 January 2022. However, Cell C filed another extension on 18 January 2022, extending the promotion to 30 April 2022, which

		Decommission Date: 30 April 2022		will be discussed in the next reporting period.										
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.	<p>Filed: 07 November 2019</p> <p>Launch Date: 19 November 2019</p> <p>Extension Date: 17 September 2021, 18 January 2022</p> <p>Decommission Date: 30 April 2022</p>	<p>Cell C's WhatsApp Boost Bundle Promotion was analysed in the 2021/22 FY Q2 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/tariffs-analysis-report-01-jan-to-30-jun-2021></p>	Ongoing as at 31 December 2021 and was expected to be decommissioned on 31 January 2022. However, Cell C filed another extension on 18 January 2022, extending the promotion to 30 April 2022, which will be discussed in the next reporting period.										
Telkom FTTx Unlimited Home Lite Promotion	Telkom rewards new customers residing in the Openserve FTTx footprint and customers who have purchased a FTTx	<p>Filed: 08 October 2020</p> <p>Launch Date: 12 October 2020</p>	<p><i>Table 89: Telkom's FTTx Unlimited Home Lite Promotion</i></p> <table border="1"> <thead> <tr> <th>Name of Product</th><th>Current Speed (10Mbps)</th><th>New Speed (25Mbps)</th><th>Price Difference</th><th>Variance (%)</th></tr> </thead> <tbody> <tr> <td>FTTx Unlimited Home Lite 25Mbps</td><td>R 499</td><td>R 399</td><td>-R 100</td><td>-20%</td></tr> </tbody> </table> <p><i>Source: ICASA Database Based on Tariff Notifications</i></p>	Name of Product	Current Speed (10Mbps)	New Speed (25Mbps)	Price Difference	Variance (%)	FTTx Unlimited Home Lite 25Mbps	R 499	R 399	-R 100	-20%	Ongoing as at 31 December 2021, however it will be decommissioned on 31 March 2022.
Name of Product	Current Speed (10Mbps)	New Speed (25Mbps)	Price Difference	Variance (%)										
FTTx Unlimited Home Lite 25Mbps	R 499	R 399	-R 100	-20%										

	10Mbps Unlimited Home Lite bundle with a discounted subscription fee on the 25Mbps line speed.	Amendment Date: 03 March 2021 Extension Date: 26 January 2021, 03 March 2021, 28 September 2021 Decommission Date: 31 March 2022																																			
Vodacom Daily Deals on VodaPay Promotion	Vodacom's Daily Deals on VodaPay Promotion offered customers daily data bundles, voice minutes (on-net and all-net) and URL-specific data bundles priced at R 1.	Filed: 29 September 2021 Launch Date: 10 October 2021 Decommission Date: 10 January 2022	<table><tr><td colspan="3">Table 90: Vodacom Daily Deals on VodaPay</td></tr><tr><th>Description</th><th>Price (Incl. VAT)</th><th>Validity</th></tr><tr><td>1GB</td><td>R 1</td><td>1 day</td></tr><tr><td>60 any network minutes</td><td>R 1</td><td>1 day</td></tr><tr><td>60 Vodacom minutes</td><td>R 1</td><td>1 day</td></tr><tr><td>1GB WhatsApp</td><td>R 1</td><td>1 day</td></tr><tr><td>500MB</td><td>R 1</td><td>1 day</td></tr><tr><td>250MB</td><td>R 1</td><td>1 day</td></tr><tr><td>100MB</td><td>R 1</td><td>1 day</td></tr><tr><td>1GB Facebook</td><td>R 1</td><td>1 day</td></tr><tr><td>1GB YouTube</td><td>R 1</td><td>1 day</td></tr></table> <p>Source: ICASA database based on Tariff Notifications</p>	Table 90: Vodacom Daily Deals on VodaPay			Description	Price (Incl. VAT)	Validity	1GB	R 1	1 day	60 any network minutes	R 1	1 day	60 Vodacom minutes	R 1	1 day	1GB WhatsApp	R 1	1 day	500MB	R 1	1 day	250MB	R 1	1 day	100MB	R 1	1 day	1GB Facebook	R 1	1 day	1GB YouTube	R 1	1 day	Ongoing as at 31 December 2021, however it was decommissioned on 10 January 2022.
Table 90: Vodacom Daily Deals on VodaPay																																					
Description	Price (Incl. VAT)	Validity																																			
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1GB Facebook	R 1	1 day																																			
1GB YouTube	R 1	1 day																																			

MTN Data Carry Over and Data Share Rule	MTN's Data Carry Over and Share Services Rule have been amended for the selected standard prepaid data bundles.	Filed: 05 November 2021	<p>Prior to the amendment, MTN's data rollover rule/condition enabled customers to extend the validity of unused data by purchasing a bundle with the same validity period before the expiry date. For example, if customers purchased 2GB of data and have 1GB left of data remaining towards the expiry date, they can purchase an additional 500MB of the same validity, to extend the use of the remaining 1GB. In light of the amendment, customers now need to purchase the data bundle of the same volume or higher (of the initial purchased data bundle) to be eligible to roll over the remaining data bundle. For example, if customers purchased 2GB of data and have 1GB left of data remaining towards the expiry date, they can purchase at least 2GB of the same validity, to extend the use of the remaining 1GB. That is, the purchase of data bundles below the initially purchased 2GB will not extend the validity of the remaining data.</p> <p>MTN's Data Share service enables a customer to share data with at most 10 other MTN subscribers for consumer accounts and 20 subscribers for business accounts. The Data Share option was also made available on the bundles set out in table 91 below.</p> <p><i>Table 91: MTN Data Bundles Affected</i></p> <table><tr><th colspan="4">Daily Data Bundles</th></tr><tr><td>MTN Daily 1GB</td><td>MTN Daily 50MB Data Bundle</td><td>MTN Daily 180MB Data Bundle</td><td>MTN Daily Data 200MB</td></tr><tr><td>MTN Daily 50MB</td><td>MTN Daily 60MB Data Bundle</td><td>MTN Daily 240MB Data Bundle</td><td>MTN Daily Data 300MB</td></tr><tr><td>MTN Daily 25MB</td><td>MTN Daily 100MB Data Bundle</td><td>MTN Daily 270MB Data Bundle</td><td>MTN Daily Data 3GB</td></tr><tr><td>MTN Daily 120MB</td><td>MTN Daily 120MB Data Bundle</td><td>MTN Daily 330MB Data Bundle</td><td>MTN Daily Data 1GB</td></tr><tr><td>MTN Daily 300MB</td><td>MTN Daily 150MB Data Bundle</td><td>Daily 100MB Data</td><td></td></tr></table>	Daily Data Bundles				MTN Daily 1GB	MTN Daily 50MB Data Bundle	MTN Daily 180MB Data Bundle	MTN Daily Data 200MB	MTN Daily 50MB	MTN Daily 60MB Data Bundle	MTN Daily 240MB Data Bundle	MTN Daily Data 300MB	MTN Daily 25MB	MTN Daily 100MB Data Bundle	MTN Daily 270MB Data Bundle	MTN Daily Data 3GB	MTN Daily 120MB	MTN Daily 120MB Data Bundle	MTN Daily 330MB Data Bundle	MTN Daily Data 1GB	MTN Daily 300MB	MTN Daily 150MB Data Bundle	Daily 100MB Data		Ongoing as at 31 December 2021.
Daily Data Bundles																												
MTN Daily 1GB	MTN Daily 50MB Data Bundle	MTN Daily 180MB Data Bundle	MTN Daily Data 200MB																									
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			MTN Daily 45MB Data Bundle	MTN Daily 160MB Data Bundle	MTN Daily Data 30MB		
			Weekly Data Bundles				
			MTN 50MB Weekly Prepaid	MTN 2GB Weekly Prepaid	MTN Weekly 350MB	MTN Weekly 3.5GB Data Bundle	
			MTN 100MB Weekly Prepaid	MTN 2GB Weekly	MTN Weekly 200MB Data Bundle	MTN Weekly 4.5GB Data Bundle	
			MTN 300MB Weekly Prepaid	MTN 1GB Weekly Data Bundle	MTN Weekly 300MB Data Bundle	MTN Weekly 8.5GB Data Bundle	
			MTN 500MB Weekly Prepaid	MTN Weekly 30MB	MTN Weekly 600MB Data Bundle	MTN Weekly 50MB	
			MTN 1GB Weekly Prepaid	MTN Weekly 200MB	MTN Weekly 900MB Data Bundle	MTN Weekly 50MB	
			MTN 50MB Weekly	MTN Weekly 5GB	MTN Weekly 1GB Data Bundle	MTN Weekly 70MB	
			MTN 100MB Weekly	MTN Weekly 500MB	MTN Weekly 1.25GB Data Bundle	MTN Weekly 70MB	
			MTN 300MB Weekly	MTN Weekly 1GB	MTN Weekly 1.5GB Data Bundle	MTN Weekly 100MB	
			MTN 500MB Weekly	MTN Weekly 70MB	MTN Weekly 2GB Data Bundle	MTN Weekly 120MB	
			MTN 1GB Weekly	MTN Weekly 120MB	MTN Weekly 2.5GB Data Bundle	MTN Weekly 120MB	
			MTN Weekly 350MB	MTN Weekly 350MB	MTN Weekly 200MB	MTN Weekly 200MB	
			MTN Weekly 350MB	MTN Weekly 100MB	MTN Weekly 500MB	MTN Weekly 200MB	
			MTN Weekly 350MB				
			Business Broadband Data				
			MTN Business Broadband LTE Bundle 2GB	MTN Business Broadband LTE Bundle 10GB	MTN Business Broadband LTE Bundle 30GB	MTN Business Broadband LTE Bundle 100GB	
			MTN Business Broadband LTE Bundle 5GB	MTN Business Broadband LTE Bundle 20GB	MTN Business Broadband LTE Bundle 50GB		
			Fortnightly and 30-day Data				
			1GB Fortnightly Data Bundle	MTN 200GB	MTN DATA 50GB		
			MTN Fortnightly 1GB	MTN 300GB	MTN DATA 100GB		
			<i>Source: ICASA database based on Tariff Notifications</i>				

MetroFibre Uitenhage Despatch Promotion	MetroFibre's Uitenhage Despatch Promotion offers free installation of termination points in various residential areas in South Africa.	Filed: 10 November 2021 Launch Date: 17 November 2021 Decommission Date: 28 February 2022	As part of the MetroFibre Uitenhage Despatch Promotion, customers are offered free installation of termination points at an on-network residence in the Uitenhage and Despatch areas.	Ongoing as at 31 December 2021, however it will be decommissioned on 28 February 2022.
Cipherwave All Home-Connect FTTH Packages on Octotel Promotion	Cipherwave rewards customers with a zero rated FTTH service subscription.	Filed: 12 November 2021 Launch Date: 15 November 2021 Decommission Date: 31 January 2022	The promotion granted 60 days' free subscription for all new subscribers signing up during the promotional period.	Ongoing as at 31 December 2021, however it was decommissioned on 31 January 2022.
MetroFibre Termination Point at No	MetroFibre's Termination Point at No Cost Promotion rewards customers	Filed: 16 November 2021	As part of the MetroFibre Termination Point at No Cost 2021 Promotion, customers are offered free installation of termination points after placing an order for a fibre data service simultaneously with the order for installation.	Ongoing as at 31 December 2021, however it was

Cost 2021 Promotion	with free termination point services in residential areas in South Africa.	Launch Date: 01 December 2021 Decommission Date: 31 March 2022		decommissioned on 31 March 2022.																
Cell C Day-by-Day Bundles Promotion	The Cell C Day-by-Day Data Bundles Promotion offered customers three data bundle packages with a daily allocation of between 250MB to 1 GB.	Filed:16 November 2021 Launch Date: 01 December 2021 Decommission Date: 31 March 2022	<p>Table 92: Cell C Day-by-Day Data Bundles Promotion</p> <table><tr><th>Daily Allocation</th><th>Total Allocation</th><th>Validity</th><th>Price</th></tr><tr><td>1GB</td><td>7GB</td><td>7 Days</td><td>R 89</td></tr><tr><td>250MB</td><td>7.5GB</td><td>30 Days</td><td>R 99</td></tr><tr><td>1GB</td><td>30GB</td><td>30 Days</td><td>R 299</td></tr></table> <p>Source: ICASA Database based on Tariff Notifications</p>	Daily Allocation	Total Allocation	Validity	Price	1GB	7GB	7 Days	R 89	250MB	7.5GB	30 Days	R 99	1GB	30GB	30 Days	R 299	Ongoing as at 31 December 2021, however it will be decommissioned on 31 March 2022.
Daily Allocation	Total Allocation	Validity	Price																	
1GB	7GB	7 Days	R 89																	
250MB	7.5GB	30 Days	R 99																	
1GB	30GB	30 Days	R 299																	
Cell C Acquisition Promotion	The Cell C Acquisition Promotion was applicable and targeted to new customers residing in Limpopo upon activation. The Cell C Acquisition	Filed: 17 November 2021 Launch Date: 18 November 2021	<p>Table 93: Cell C Acquisition Promotion</p> <table><tr><th>Reward</th><th>Recharge Amount</th><th>Validity</th></tr><tr><td>500MB WhatsApp</td><td>R 10</td><td>7 Days</td></tr></table> <p>Source: ICASA Database based on Tariff Notifications</p>	Reward	Recharge Amount	Validity	500MB WhatsApp	R 10	7 Days	Ongoing as at 31 December 2021, however it will be decommissioned on 28 February 2022.										
Reward	Recharge Amount	Validity																		
500MB WhatsApp	R 10	7 Days																		

	Promotion offered new customers a 500MB WhatsApp bundle when they recharge for R 10.	Decommission Date: 28 February 2022		
MetroFibre Uitenhage & Despatch ISP/Reseller Promotion	MetroFibre's Uitenhage Despatch Promotion offers free installation of termination points in various residential areas in South Africa.	Filed: 18 November 2021 Launch Date: 01 December 2021 Decommission Date: 28 February 2022	The MetroFibre Uitenhage & Despatch ISP/Reseller Promotion offered customers free installation of termination points at their residence subject to placing a fibre service order with the ISP/Reseller.	Ongoing as at 31 December 2021, however it will be decommissioned on 28 February 2022.
MTN Data Unitisation	MTN's Data Unitisation entailed an amendment to its data services, wherein it increased the data billing increment for selected price plans.	Filed: 18 November 2021 Launch Date: 29 November 2021	Selected paid for bundles on 25kbps and 50kbps data billing increments all increased to 100kbps. Annexure C shows a sample of data bundles affected by Data Unitisation.	Ongoing as at 31 December 2021, however it will be decommissioned on 28 February 2022.

		Decommission Date: 28 February 2022								
MTN Voice Unitization	MTN’s Voice Unitisation entailed an amendment to its voice services, wherein it amended its per minute billing for selected voice bundles to ensure network optimisation and to maintain good network quality during the summer commercial period.	Filed: 19 November 2021 Launch Date: 30 November 2021 Decommission Date: 28 February 2022	The amendment was as follows: <ul style="list-style-type: none">• Paid bundles All-Net and On-Net: R 1.25 per minute;• Bundle Bonanza: R 1.50 per minute;• Free and Promo bundles: R 1.50 per minute; and• CVM bundles: R 1.25 per minute	Ongoing as at 31 December 2021, however it will be decommissioned on 28 February 2022.						
Telkom Easy Connect Fibre Uncapped Bundles Promotion	The Telkom Easy Connect Fibre Uncapped Bundles Promotion was available for a three- month period and offered customers two bundles ranging	Filed:07 December 2021 Launch Date: 09 December 2021	<i>Table 94: Telkom Easy Connect Fibre Uncapped Bundles Promotion</i> <table><tr><th>Product Description</th><th>Price</th></tr><tr><td>Easy Connect Fibre 10/5Mbps</td><td>R 299</td></tr><tr><td>Easy Connect Fibre 20/10Mbps</td><td>R 369</td></tr></table> <i>Source: ICASA Database based on Tariff Notifications</i>	Product Description	Price	Easy Connect Fibre 10/5Mbps	R 299	Easy Connect Fibre 20/10Mbps	R 369	Ongoing as at 31 December 2021 and will be available for period of 3 months from the launch date.
Product Description	Price									
Easy Connect Fibre 10/5Mbps	R 299									
Easy Connect Fibre 20/10Mbps	R 369									

	from 10/5Mbps to 20/10Mbps.	Decommission Date: March 2022														
MTN PAYG Back to School 2022 Promotion	MTN's PAYG Back to School 2022 Promotion offered customers a free additional Home Data Bundle on the MTN BozzaGigs and MTN Pulse plans.	Filed: 08 December 2021 Launch Date: 03 January 2022 Decommission Date: 31 March 2022	<p>Table 95: MTN PAYG Back to School 2022 Promotion</p> <table><tr><th>Price plan deal/bundles</th><th>Additional Home Bundle Data (FREE Value)</th><th>Price (Incl. VAT)</th></tr><tr><td>MTN BozzaGigs (5GB Anytime + 5GB Night) (LTE wi-fi Router Deal)</td><td>10GB @Home bundle- 30 days Once-off</td><td>R 499</td></tr><tr><td>MTN Pulse Student 10GB bundle (5GB Anytime+5GB Night)</td><td>10GB @Home bundle- 7 days Once-off</td><td>R 49</td></tr></table> <p>Source: ICASA database based on Tariff Notifications</p>	Price plan deal/bundles	Additional Home Bundle Data (FREE Value)	Price (Incl. VAT)	MTN BozzaGigs (5GB Anytime + 5GB Night) (LTE wi-fi Router Deal)	10GB @Home bundle- 30 days Once-off	R 499	MTN Pulse Student 10GB bundle (5GB Anytime+5GB Night)	10GB @Home bundle- 7 days Once-off	R 49	Ongoing as at 31 December 2021, however it will be decommissioned on 31 March 2022.			
Price plan deal/bundles	Additional Home Bundle Data (FREE Value)	Price (Incl. VAT)														
MTN BozzaGigs (5GB Anytime + 5GB Night) (LTE wi-fi Router Deal)	10GB @Home bundle- 30 days Once-off	R 499														
MTN Pulse Student 10GB bundle (5GB Anytime+5GB Night)	10GB @Home bundle- 7 days Once-off	R 49														
Vodacom Back to School Promotion	Vodacom's Back to School Promotion rewarded customers with discounted Everyday-Ta bundles and free data bundles and/or integrated bundles on qualifying spends as	Filed: 10 December 2021 Launch Date: 26 December 2021	<p>Table 96: Vodacom Back to School Promotion</p> <table><tr><th>Promotion</th><th>Description</th><th>Validity</th></tr><tr><td>Everyday - Ta Pinned Voucher</td><td>Pay R 599 upfront and receive 250MB data allocated daily + 7.5GB Night Owl Data allocated monthly</td><td>12 months</td></tr><tr><td>Recharge and Get</td><td>Recharge with R 12 or more and receive a 250MB WhatsApp bundle</td><td>7 Days</td></tr><tr><td>Buy and Get</td><td>Buy a qualifying 3G / 4G device, recharge with cumulative value of R 29 within a 30-day period and receive an integrated bundle: a. For 3G devices: 10 Vodacom minutes + 100MB + 500MB YouTube valid for 7 days b. For 4G devices: 20 Vodacom minutes + 175MB + 1GB YouTube valid for 7 days</td><td>7 Days</td></tr></table> <p>Source: ICASA database based on Tariff Notifications</p>	Promotion	Description	Validity	Everyday - Ta Pinned Voucher	Pay R 599 upfront and receive 250MB data allocated daily + 7.5GB Night Owl Data allocated monthly	12 months	Recharge and Get	Recharge with R 12 or more and receive a 250MB WhatsApp bundle	7 Days	Buy and Get	Buy a qualifying 3G / 4G device, recharge with cumulative value of R 29 within a 30-day period and receive an integrated bundle: a. For 3G devices: 10 Vodacom minutes + 100MB + 500MB YouTube valid for 7 days b. For 4G devices: 20 Vodacom minutes + 175MB + 1GB YouTube valid for 7 days	7 Days	Ongoing as at 31 December 2021, however it was decommissioned on 31 January 2022.
Promotion	Description	Validity														
Everyday - Ta Pinned Voucher	Pay R 599 upfront and receive 250MB data allocated daily + 7.5GB Night Owl Data allocated monthly	12 months														
Recharge and Get	Recharge with R 12 or more and receive a 250MB WhatsApp bundle	7 Days														
Buy and Get	Buy a qualifying 3G / 4G device, recharge with cumulative value of R 29 within a 30-day period and receive an integrated bundle: a. For 3G devices: 10 Vodacom minutes + 100MB + 500MB YouTube valid for 7 days b. For 4G devices: 20 Vodacom minutes + 175MB + 1GB YouTube valid for 7 days	7 Days														

	determined by the operator.	Decommission Date: 31 January 2022		
Cell C Holiday at Home Promotion	The Cell C at Home Promotion applied to existing Cell C Home Connecta Flexi customers who purchased Home Connecta Flexi 400GB and/or 1TB data holidays.	Filed: 14 December 2021 Launch Date: 15 December 2021 Decommission Date: 31 January 2022	Customers who purchased Home Connecta Flexi 400GB and/or 1TB data holidays and thereby qualify for choice of one of the following reward vouchers: <ul style="list-style-type: none"> • Xbox Game Pass Ultimate; • PlayStation Plus; • Deezer Premium; • Showmax; or • JOOX Subscription Voucher. 	Ongoing as at 31 December 2021, however it was decommissioned on 31 January 2022.
MWEB on MetroFibre Promotion	The MWEB on Metrofibre Promotion entailed a 50% off price reduction for all new Metrofibre (MFN) customers.	Filed: 20 December 2021 Launch Date: 03 January 2022 Decommission Date: 31 March 2022	Qualifying customers received a free installation, free activation, a free router and 50% off for the first 2 months.	Ongoing as at 31 December 2021, however it will be decommissioned on 31 March 2022.

MetroFibre Durban/Kouga December Termination Point at No Cost 2021 Promotion	The promotion offered customers free installation of termination points at no cost in the Durban and Kouga areas.	Filed: 24 November 2021 Launch Date: 01 December 2021 Decommission Date: 15 January 2022	Free installation of terminal points was offered to customers in the Durban and Kouga areas.	Ongoing as at 31 December 2021, however it was decommissioned on 15 January 2022
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Annexure B: Promotions that Ended During the Period Under Review

TARIFF PLAN	EXPLANATION OF THE TARIFF PLAN	RELEVANT DATES
Vodacom Everyday-ta Promotion	Vodacom's Everyday-ta Promotion offered prepaid and hybrid customers bundles that are paid for upfront and allocated daily, depending on the number of days of allocation.	<p>Filed: 01 June 2021</p> <p>Launch Date: 15 June 2021</p> <p>Amendment Date: 04 June 2021, 05 July 2021, 16 August 2021, 24 August 2021</p> <p>Decommission Date: 15 September 2021</p>
MetroFibre Termination Point Durban North Promotion	The Promotion entailed an offer for free installation of termination points for customers in the Durban North suburbs.	<p>Filed: 07 July 2021</p> <p>Launch Date: 16 July 2021</p> <p>Decommission Date: 31 October 2021</p>
MetroFibre Termination Point Emalahleni Promotion	The Promotion entailed an offer for free installation of termination points for customers in the Emalahleni area.	<p>Filed: 07 July 2021</p> <p>Launch Date: 16 July 2021</p> <p>Decommission Date: 31 October 2021</p>

MTN Springboks and Irish Lions Tour 2021 Promotion	MTN offered promotional video content bundles to allow customers to watch the Springboks – British and Irish Lions Tour 2021 action on DSTV Now.	<p>Filed: 07 July 2021</p> <p>Launch Date: 18 July 2021</p> <p>Decommission Date: 01 August 2021</p>
MetroFibre Termination Point KlerksDorp Promotion	The Promotion entailed an offer for free installation of termination points for customers in the KlerksDorp area.	<p>Filed: 13 July 2021</p> <p>Launch Date: 16 July 2021</p> <p>Decommission Date: 31 October 2021</p>
The MetroFibre Termination Point Eastern Cape Promotion	The Promotion entailed an offer for free installation of termination points for customers in the Eastern Cape.	<p>Filed: 13 July 2021</p> <p>Launch Date: 16 July 2021</p> <p>Decommission Date: 31 October 2021</p>
The MetroFibre Termination Point Pietermaritzburg Promotion	The Promotion entailed an offer for free installation of termination points for customers in the Pietermaritzburg area.	<p>Filed: 13 July 2021</p> <p>Launch Date: 16 July 2021</p> <p>Decommission Date: 31 October 2021</p>
Telkom Internet Vouchers Promotion	The Promotion offered three vouchers with validity periods ranging from 3 days to 30 days on its 25/25Mbps FTTH.	<p>Filed: 14 July 2021</p>

		<p>Launch Date: 24 July 2021</p> <p>Decommission Date: 24 January 2022</p>
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>Extension Date(s): 22 July 2021</p> <p>Decommission Date: 31 October 2021</p>
Cell C Recharge Drop Promotion	The promotional offer was such that Cell C rewarded 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(s): 22 July 2021</p> <p>Decommission Date: 31 October 2021</p>
Cell C Data Win Back Promotion	Cell C's Data Win Back Promotion rewarded selected Cell C 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(s): 22 July 2021</p>

		Decommission Date: 31 October 2021
MetroFibre GigaGo Vumatel Go20 Promotion	The MetroFibre GigaGo Vumatel Go20 Promotion offered new customers a reduced price on the GigaGo 10Mbps package on the Vumatel FTTH network of R 639 per month for a period of 12 months after which customers will be billed at the full price of R 699.	<p>Filed: 27 July 2021</p> <p>Launch Date: 04 August 2021</p> <p>Extension: 08 October 2021</p> <p>Decommission Date: 31 December 2021</p>
Cell C Recharge with R 15 or more and win Promotion	The promotion offered all prepaid and hybrid customers who recharged with R 15 or more an opportunity to win on a weekly basis, a payment break calculated as follows: previous month's spend*3(voice minutes and data).	<p>Filed: 20 August 2021</p> <p>Launch Date: 21 August 2021</p> <p>Decommission Date: 30 October 2021</p>
MetroFibre Clover Hill Promotion	The promotion entailed discounted FTTH rates to residents of Clover Hill, Howick, KZN, who met the requirement of being MetroFibre on-net customers.	<p>Filed: 20 August 2021</p> <p>Launch Date: 09 September 2021</p> <p>Decommission Date: 31 October 2021</p>
Vodacom Promotional Bundles	Vodacom offered customers promotional single-purchase daily recurring data bundles, promotional once-off data bundles, URL-specific and integrated bundles.	<p>Filed: 24 August 2021</p> <p>Launch Date: 03 September 2021</p>

		Decommission Date: 03 December 2021
MWEB Black Friday Special	The two-part promotion entailed a 1GB and 200Mbps broadband offering and was aimed at wholesale customers and at retail customers.	Filed: 05 October 2021 Launch Date: 22 September 2021 Decommission Date: 26 November 2021
MTN Home Wi-fi Price Plan	MTN decommissioned its Home Wi-fi product, effective from the 01 November 2021	Filed: 12 June 2020 Launch Date: 01 July 2020 Decommission Date: 21 October 2021
MTN MoMo App Download Promotion	MTN's MoMo App Download Promotion rewarded customers who downloaded and transacted via the MoMo app with a 1GB data bundle valid for 24 hours.	Filed: 05 November 2021 Launch Date: 16 November 2021 Decommission Date: 31 December 2021
Rain Unlimited Home 5G Standard – Black Friday Promotion	Rain's Unlimited Home 5G Standard – Black Friday promotion entailed a price reduction of 28% of the standard price from R 699 to R 499.	Filed: 10 November 2021 Launch Date: 22 November 2021 Decommission Date: 06 December 2021

Rain Unlimited Home 5G Standard – Black Friday Promotion	Rain filed its Unlimited Home 5G Premium – Black Friday Promotion with the Authority, which entailed a price reduction of 50% of the standard price from R 999 to R 499 as part of a Black Friday promotion.	<p>Filed: 10 November 2021</p> <p>Launch Date: 22 November 2021</p> <p>Decommission Date: 06 December 2021</p>
Rain 4G Prepaid Gigs Promotion	Rain’s 4G Prepaid Gigs Promotion offered customers a prepaid 4G product to be used in any 4G enabled device as part of its “Give a gig summer campaign” priced at R 50 per Gig. Customers who signed up for the promotion received a free to 1GB upon SIM card activation.	<p>Filed: 10 November 2021</p> <p>Launch Date: 22 November 2021</p> <p>Decommission Date: 31 December 2021</p>
MTN Black Friday Promotion PAYG	MTN’s prepaid “Black Friday” Promotion offered daily, weekly and monthly data bundles, voice minutes and integrated bundles, which were available from selected channels and on certain price plans.	<p>Filed: 11 November 2021</p> <p>Launch Date: 15 November 2021</p> <p>Decommission Date: 05 December 2021</p>
MTN Supersonic Black Friday Double Data Promotion	MTN offered its Supersonic F-LTE promotional bundles wherein it rewarded customers with double data packages on its F-TLE plan at no additional charge.	<p>Filed: 15 November 2021</p> <p>Launch Date: 24 November 2021</p> <p>Amendment Date: 02 December 2021</p>

		Decommission Date: 31 December 2021
Cell C UltraBonus Retention Promotion	The Cell C UltraBonus Retention Promotion offered customers additional bonus on-net airtime equivalent to the recharge amount valid until midnight of day of purchase.	<p>Filed: 17 November 2021</p> <p>Launch Date: 19 November 2021</p> <p>Decommission Date: 30 November 2021</p>