Independent Communications Authority of South Africa

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BI-ANNUAL REPORT ON THE ANALYSIS OF TARIFF NOTIFICATIONS SUBMITTED TO ICASA FOR THE PERIOD 01 JANUARY 2023 TO 30 JUNE 2023

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, and the Third Amendment to the Standard Terms and Conditions for Individual Electronic Communications Services, 2023, Government Gazette No. 48317. 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 Subscription/Plan	The International Telecommunications Union (ITU) (2020), defines this as a subscription where the subscriber is billed after their use of services, typically at the end of each month.
Prepaid Subscription/Plan	The ITU (2020), defines this as a subscription where, instead of paying an ongoing monthly fee, users purchase blocks of usage time in advance of using the service.

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 January 2023 to 30 June 2023[1], as well as provide an update on initiatives which are currently underway to reduce the cost to communicate. This ensures that there is retail tariff transparency, which could potentially encourage competition as it is likely to minimise pricing and product information asymmetries in the sector.

Table 1 shows the types of notifications received in the period 01 January 2023 to 30 June 2023.

Table 1: Type of Notifications Received - 01 January 2023 to 30 June 2023

Notification Type	Cell C	MetroFibre	MTN	Telkom	Vodacom	OLOs	Grand Total
Amendments	25	4	35	10	15	46	**135**
Extensions	44	4	4		2	1	**55**
New Products	6	1	14	2	5	17	**45**
Promotions	14	11	32	2	18	7	**84**
Termination	0	0	7	0	0	9	**16**
Grand Total	**89**	**20**	**92**	**14**	**40**	**80**	**335**

Source: ICASA Database based on Filed Tariff Notifications

The Authority received a total of 335 tariff notifications, which included 84 new promotions, 135 amendments, 55 extensions, 45 new products during the period under review, i.e., 01 January 2023 to 30 June 2023.

[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 MTN and Telkom Mobile. Telkom Mobile increased the prices of its 30-day standard prepaid data bundles from 2GB to 100GB by an average of 5%. MTN reduced the prices of its 30-day standard prepaid 500MB and 1GB data bundles by 5.8% and 7.1% to R 65 and R 79, respectively. The salient changes in the aforementioned 30-day standard prepaid data bundles made by both MNOs during the period under review are summarised and analysed in table 2 below.

Table 2: 2022/23 FY Q2 to 2023/24 FY Q2 Salient Changes to 30-day Standard Prepaid Data Bundles

Licensee	2022/23 FY (Previous Q2 Bi-annual Tariff Analysis Report)	2023/24 FY (Current Q2 Bi-annual Tariff Analysis Report)	Year-on-Year Changes
MTN	100MB priced at R 20, with an in-bundle rate of R 0.20 per MB.	Introduced a 120MB data bundle for R 20, with an in-bundle rate of R 0.17 per MB.	20% more data volume → 16.7% less in-bundle rate.
	500MB priced at R 69, with an in-bundle rate R 0.14 per MB.	Reduced the price of 500MB data bundle to R 65, which lowered the in-bundle rate to R 0.13 per MB.	Priced at 5.8% less → 5.8% lower in-bundle rate.
	1GB priced at R 85, with an in-bundle rate R 0.08 per MB.	Reduced the price of 1GB data bundle to R 79, with an in-bundle rate of R 0.08 per MB.	Priced at 7.1% less.
Telkom Mobile	2GB data bundle price at R 139, with an in-bundle rate of R 0.07 per MB.	Increased the price of 2GB data bundle to R 146, with an in-bundle rate of R 0.07 per MB.	Priced at 5% higher.
	3GB data bundle price at R 199, with an in-bundle rate of R 0.06 per MB.	Increased the price of 3GB data bundle to R 209, with a new in-bundle rate of R 0.07 per MB.	Priced at 5% higher → 5% higher in-bundle rate.
	5GB data bundle price at R 299, with an in-bundle rate of R 0.06 per MB.	Increased the price of 5GB data bundle to R 314, with an in-bundle rate of R 0.06 per MB.	Priced at 5% higher.
	10GB data bundle priced at R 469 with an in-bundle rate of R 0.05 per MB.	Increased the price of 10GB data bundle to R 493, with an in-bundle rate of R 0.05 per MB.	Priced at 5.1% higher.
	20GB data bundle priced at R 699, with an in-bundle rate of R 0.03 per MB.	Increased the price of 20GB data bundle to R 734, which increased the in-bundle rate to R 0.04 per MB.	Priced at 5% higher → 5% higher in-bundle rate.
	50GB data bundle priced at R 1 499, with an in-bundle rate of R 0.03 per MB.	Increased the price of 50GB data bundle to R 1 574 with an in-bundle rate of R 0.03 per MB.	Priced at 5% higher.
	100GB data bundle priced at R 2 499, with an in-bundle rate of R 0.02 per MB.	Increased the price of 100GB data bundle to R 2 624, which increased the in-bundle rate to R 0.03 per MB.	Priced at 5% higher → 5% higher in-bundle rate.

Source: ICASA Database based on Filed Tariff Notifications

MTN also amended its weekly data bundles wherein it upsized the data bundle allocation of its 7-day standard prepaid 50MB to 60MB while the price remained unchanged at R 10. The operator's weekly 1GB data bundle was reduced by R 5 or 7.1% from R 70 to R 65. MTN also introduced a 3-Day 1.5GB data bundle at a retail price of R 40 which translates to an in-bundle rate of R 0.03 per MB.

A number of notifications were filed by the four MNOs in the voice services market, which entailed new products and amendments of prepaid price plans. Cell C and Vodacom introduced new prepaid tariff plans, namely, Super Bonus and Khosi Bonus tariff plans, with voice rates charging R 1.49 and R 1.55 per minute, respectively. Telkom Mobile and MTN filed amendments to selected prepaid price plans. For example, Telkom Mobile, increased the OOB voice rate of Thola More off-net and on-net OOB voice rates by 8.7% and 16.7% to R 0.75 and R 0.35 per minute, respectively. MTN increased the OOB voice rate of its Bonus Bonanza price plan by 51.5 % or R 0.51 from R 0.99 to R 1.50 per minute.

The Authority published the End-user and Subscriber Service Charter End-User and Subscriber Service Charter Amendment Regulations 2023 with the Reasons Document in Government Gazette No 48318 and 48329 on 28 March 2023 and 29 March 2023, respectively. The amendment of these Regulations is aimed at promoting transparency, consumer protection, and at ensuring high quality of service in the provision of communication services. Given the urgency to protect the rights of consumers in an increasingly online digital market, the Authority proceeded with the implementation of the Quality of Service component of the existing regulations. However, amendments regarding the complex rules governing data expiry and data transfers will be the subject of a further round of consultations with stakeholders, given the strong views raised by stakeholders and the challenges of identifying a straightforward and feasible solution.

The Authority also updated its brief comparative analysis of fibre packages for current prices[2] and average prices of four different fibre line speeds offered by fibre service providers on various fibre networks. For example, on the 25/25Mbps line speed, 14 out of the 27 sampled packages (52%) are priced at an amount less than the average price of R 612, while on the 50/50Mbps, 35 out of the 58 sampled packages (60%) are priced at an amount less than the average price of R 803.

[2] It should be noted that the Report considered prevailing prices in the period under review, and therefore updated as at 30 June 2023.

1. Introduction

In terms of the Standard Terms and Conditions for Individual Licences Regulations (*Government Gazette No. 33294)* of 2010, individual licensees were required to file notifications of tariffs with the Authority, seven (7) days prior to launching them in the market. However, with the Third Amendment to the Standard Terms and Conditions for Individual Electronic Communications Services, 2023 (*Government Gazette No. 48317)* and the End-user and Subscriber Service Charter Regulations (*Government Gazette No. 39898)* of 2016, as amended, individual licensees are now required to file notifications of tariffs and promotional tariffs with the Authority, five (5) days[3] and seven (7) days prior to launching them in the market, respectively. The analysis contained in this report is based on prepaid tariffs that were filed as in accordance with the aforementioned Regulations; during the period of 01 January 2023 to 30 June 2023.

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 2022/23 FY fourth quarter (Q4) Tariff Analysis Report, and it also highlights changes in prepaid standard mobile voice plans, prepaid standard and promotional mobile data plans, month-to-month (MtM) LTE and 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:

[3] As per the Third Amendment Standard Terms and Conditions for Individual Electronic Communications Services Regulations, 2023, which came into effect on 28 March 2023.

- 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, 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 other[4] 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.

[4] Other prepaid tariff notifications filed or received during the period under review which were not discussed in the main part of this report and continue to exist in the market after 30 June 2023.

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 Mobile Network Operators (MNOs) and Mobile Virtual Network Operators (MVNOs) since the previous 2022/23 FY Q4 Bi-annual Tariff Analysis Report. Therefore, this sub-section is divided into two parts, i.e., 2.1.1.1, which shows the prepaid data prices for bundles offered by the MNOs and 2.1.1.2, which shows the prepaid data prices for bundles offered by MVNOs filed with the Authority in the period under review.

2.1.1.1. Prepaid Data Prices for bundles offered by MNOs

2.1.1.1.1. Prepaid 30-day validity period data bundle

This section shows the prices for 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 3 and 4 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 2022/23 FY Q2 Bi-annual Tariff Analysis Report[5], which was published on ICASA's website on 26 October 2022.

In the period under review, the Authority received amendment notifications with respect to the 30-day standard prepaid data bundles from MTN and Telkom Mobile.

[5] Pages 19-20, available online at: < https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-quarter-2-2022-23-jan-jun > Accessed on 07 July 2023

Telkom Mobile and MTN filed their amendment notifications on 17 March 2023 and 26 June 2023, respectively. All prevailing prices for Cell C and Vodacom's 30-day standard prepaid data bundles remain unchanged.

Telkom Mobile's amendment entailed price increases of its data prepaid bundles from 2GB to 100GB by an average of 5%. On the other end, MTN reduced the prices of its 500MB (5.8%) and 1GB (7.1%) and upsized the 100MB data bundle to 120MB while the price remained unchanged at R 20.

It should be noted that Cell C and Vodacom did not file any amendments or introduce any new data bundle offers with respect to their 30-day prepaid data bundles in the period under review.

Table 3: 30-day Standard Prepaid Data Bundles Prices and OOB Equivalent Prices for Vodacom and MTN

Bundle Size (MB)	Vodacom				MTN					
	Current Price (as filed on 22 September 2021)	OOB Equivalent Subscription Fee (R 0.49 per MB)	Variance in Rands (OOB Equivalent v/s Current Price)	Tariff rate per megabyte	Previous (2020/21 FY Q2) Price	Current Price (as filed on 26 June 2023)	OOB Equivalent Price (R 0.49 per MB)	Variance in Rands (OOB Equivalent v/s Price)	Variance (%) Previous v/s Current Price	Tariff rate per megabyte
50	**R 12**	R 24.50	R 12.50	R 0.24	R 10 (40MB)	**R 10 (40MB)**	R 20	R 10	0%	R 0.25
100	N/A				R 20	**R 20 (120MB)**	R 59	R 39	0%	R 0.17
200	**R 29**	R 98	R 69	R 0.15	R 29	**R 29**	R 98	R 69	0%	R 0.15
350	**R 49**	R 171.50	R 122.50	R 0.14	R 49	**R 49**	R 172	R 122.50	0%	R 0.14
500	**R 69**	R 245	R 176	R 0.14	R 69	**R 65**	R 245	R 180	-5.8%	R 0.13
1024	**R 85**	R 501.76	R 416.76	R 0.08	R 85	**R 79**	R 502	R 422.76	-7.1%	R 0.08
1536	N/A				R 99	**R 99**	R 753	R 653.64	0%	R 0.06
2048	**R 149**	R 1 003.52	N/A	R 0.07	R 149	**R 149****	R 1 004	R 854.52	0%	R 0.07
3072	**R 229**	R 1 505.28	R 1 276.28	R 0.07	R 199	**R 199****	R 1 505	R 1 306.28	0%	R 0.06
4096	**R 249**	R 2 007.04	R 1 758.04	R 0.06	N/A					
5120	N/A				R 299	**R 299****	R 2 509	R 2 209.80	0%	R 0.06
6144	**R 349**	R 3 010.56	R 2 661.56	R 0.06	R 349	**R 349****	R 3 011	R 2 661.56	0%	R 0.06
10240	**R 469**	R 5 017.60	R 4 548.60	R 0.05	R 469	**R 469****	R 5 018	R 4 548.60	0%	R 0.05
15360	**R 529**	R 7 526.40	R 6 997.40	R 0.03	N/A					
20480	N/A				R 599	**R 599****	R 10 035	R 9 436.20	0%	R 0.03
30720	**R 699**	R 15 052.80	R 14 353.80	R 0.02	N/A					
51200	**R 799**	R 25 088	R 24 289	R 0.02	R 799	**R 799****	R 25 088	R 24 289	0%	R 0.02
102400	**R 999**	R 50 176	R 49 177	R 0.01	R 999	**R 999****	R 50 176	R 49 177	0%	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 Filed Tariff Notifications.

**** N/A means not offered/cannot be calculated*

Table 4: 30-day Standard Prepaid Data Bundles Prices and OOB Equivalent Prices for Cell C and Telkom Mobile

	Cell C				Telkom Mobile					
Bundle Size (MB)	**Current Price (as filed on 29 September 2021)**	**OOB Equivalent Price (R1.10/MB)**	**Variance in Rands (OOB Equivalent v/s Price)**	**Tariff rate per MB**	**Previous Price**	**Current Price (as filed on 17 March 2023)**	**OOB Equivalent Price (R 0.30/MB)**	**Variance in Rands (OOB Equivalent v/s Price)**	**Variance (%) Previous v/s Current Price**	**Tariff rate per MB**
35	**R 10 (40MB)**	R 44	R 34	R 0.25	R 7	**R 7****	R 12.25	R 5.25	0%	R 0.20
75	**R 15 (100MB)**	R 88	R 73	R 0.15	R 14	**R 14****	R 26.25	R 12.25	0%	R 0.19
150	**R 29 (200MB)**	R 220	R 191	R 0.15	R 29	**R 29****	R 53	R 23.50	0%	R 0.19
250	**R 35**	R 275	R 240	R 0.14	N/A					
300	**R 45 (350MB)**	R 358	R 312.50	R 0.13	R 49	**R 49****	R 105	R 56	0%	R 0.16
500	N/A				R 69	**R 69****	R 175	R 106	0%	R 0.14
600	**R 69**	R 660	R 591	R 0.12			R 210			
1024	**R 85****	R 1 126.40	R 1 041.40	R 0.08	R 79	**R 79****	R 358.40	R 279.40	0%	R 0.08
1536	**R 99****	R 1 689.60	R 1 590.60	R 0.06	R 89	**R 89****	R 537.60	R 448.60	0%	R 0.06
2048	**R 149****	R 2 252.80	R 2 103.80	R 0.07	R 139	**R 146****	R 716.80	R 570.80	5%	R 0.07
3072	**R 199****	R 3 379.20	R 3 180.20	R 0.06	R 199	**R 209****	R 1 075.20	R 866.20	5.%	R 0.07
4096	**R 249****	R 4 505.60	R 4 256.60	R 0.06	N/A					
5120	N/A				R 299	**R 314****	R 1 792	R 1 478	5%	R 0.06
6144	**R 299****	R 6 758.40	R 6 459.40	R 0.05	N/A					
10240	**R 469****	R 11 264	R 10 795	R 0.05	R 469	**R 493****	R 3 584	R 3 091	5.1%	R 0.05
20480	N/A				R 699	**R 734**	R 7 168	R 6 434	5%	R 0.04
40960	**R 489**	R 45 056	R 44 567	R 0.01						
51200	N/A				R 1 499	**R 1 574**	R 17 920	R 16 346	5%	R 0.03
102400	**R 2 999**	R 112 640	R 109 641	R 0.03	R 2 499	**R 2 624**	R 35 840	R 33 216	5%	R 0.03

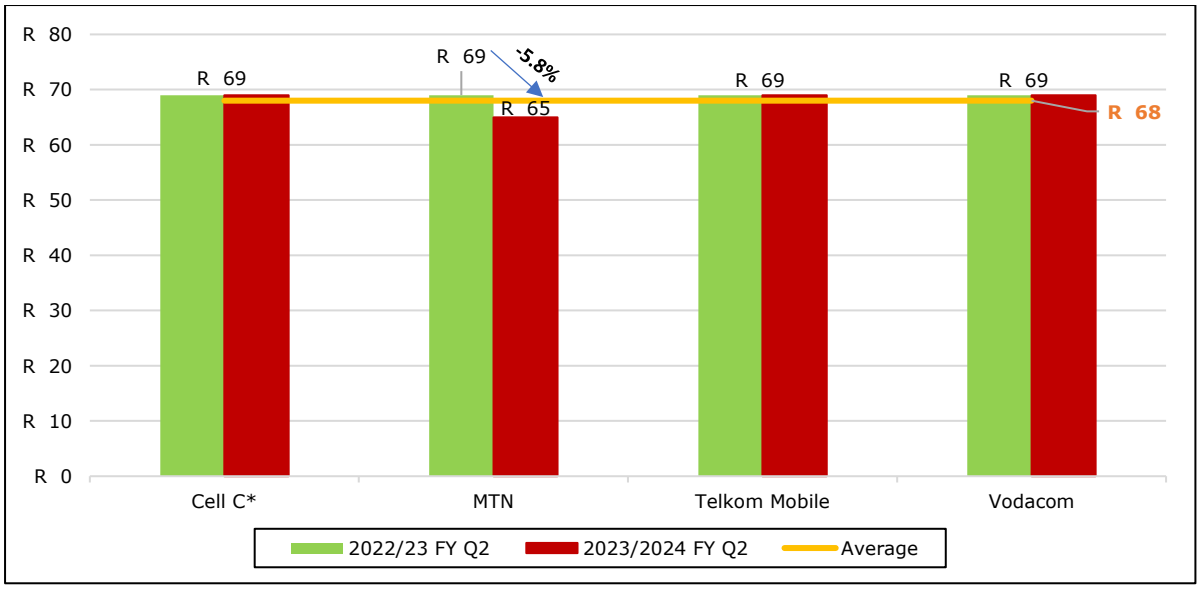
***These Cell C and Telkom Mobile prepaid data bundles offer customers additional night data which can be used at night between 12am to 5am and 12am to 7am, respectively*

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

Tables 3 and 4 above show the prevailing prices of the 30-day standard prepaid data bundles. In the period under review, Telkom Mobile increased the prices of its 30-day standard prepaid data bundles from 2GB to 100GB by an average of 5%. For example, the 2GB data bundle was increased by R 7 or 5% from R 139 to R 146. MTN decreased the price of its 500MB data bundle by R 4 or 5.8% from R 69 to R 65. The MTN 30-day prepaid 1GB data bundle was reduced by R 6 or 7.1% from R 85 to R 79. The operator also upsized the 100MB data bundle to 120MB while the price remained unchanged at R 20, which translated to a decrease in the in-bundle rate from R 0.20 to R 0.17 per MB.

Figure 1 below graphically depicts the changes on the 500MB to 600MB data bundle range, wherein MTN reduced the price of its 500MB data bundle from R 69 to R 65.

Figure 1: 2022/23 FY Q2 to 2023/24 FY Q2 Data Price changes for 500MB standard 30-day prepaid data bundles



**Cell C offers a 600MB offered at R 69.*

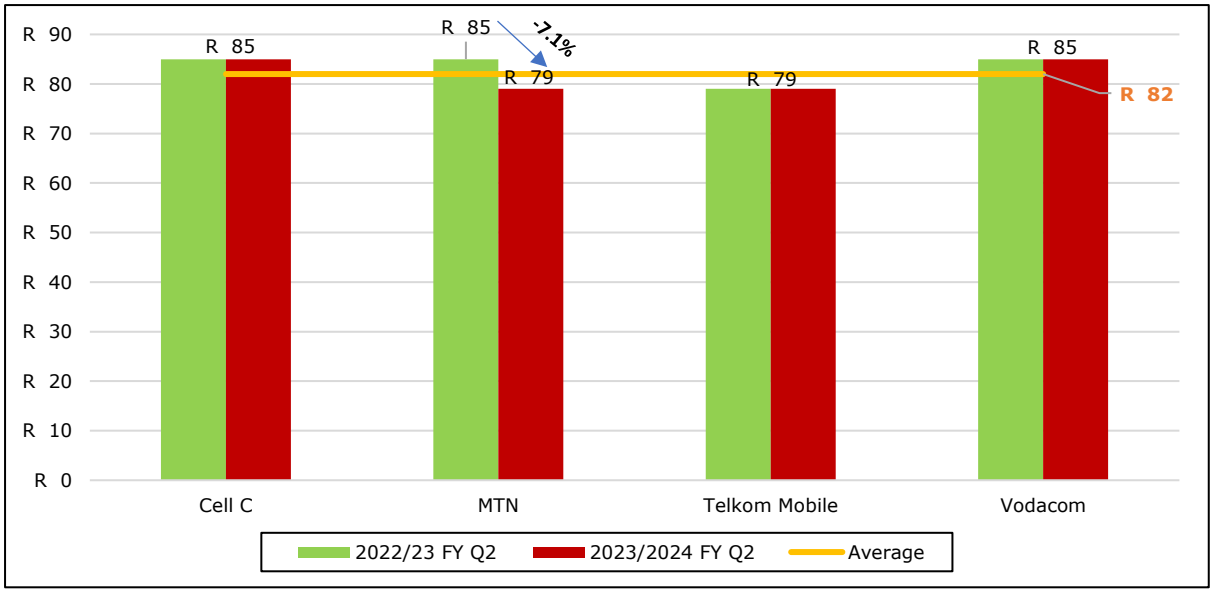
Source: ICASA Database Based on Filed Tariff Notifications

The figure above illustrates that from the 2022/23 FY Q2 to the 2023/24 FY Q2 period, MTN was the only operator that amended its 500MB data bundle which translated to a R 0.01 decrease in the in-bundle rate from R 0.14 per MB to R 0.13 per MB. Telkom Mobile and Vodacom still offer their respective 500MB data bundles for R 69 which translates to R 0.14 per MB. Cell C offers its 600MB data

bundle at R 69 which translates to a R 0.11 per MB in-bundle rate. Therefore, Cell C's 600MB offers more value for money in the 500MB to 600MB data bundle range. On average, the operators charge R 68 in the 500MB to 600MB data bundle range.

Figure 2 below graphically depicts the changes on the standard 30-day prepaid 1GB data bundles, where MTN reduced the price of its 1GB data bundle from R 85 to R 79.

Figure 2: 2022/23 FY Q2 to 2023/24 FY Q2 Data Price changes for 1GB standard 30-day prepaid data bundles

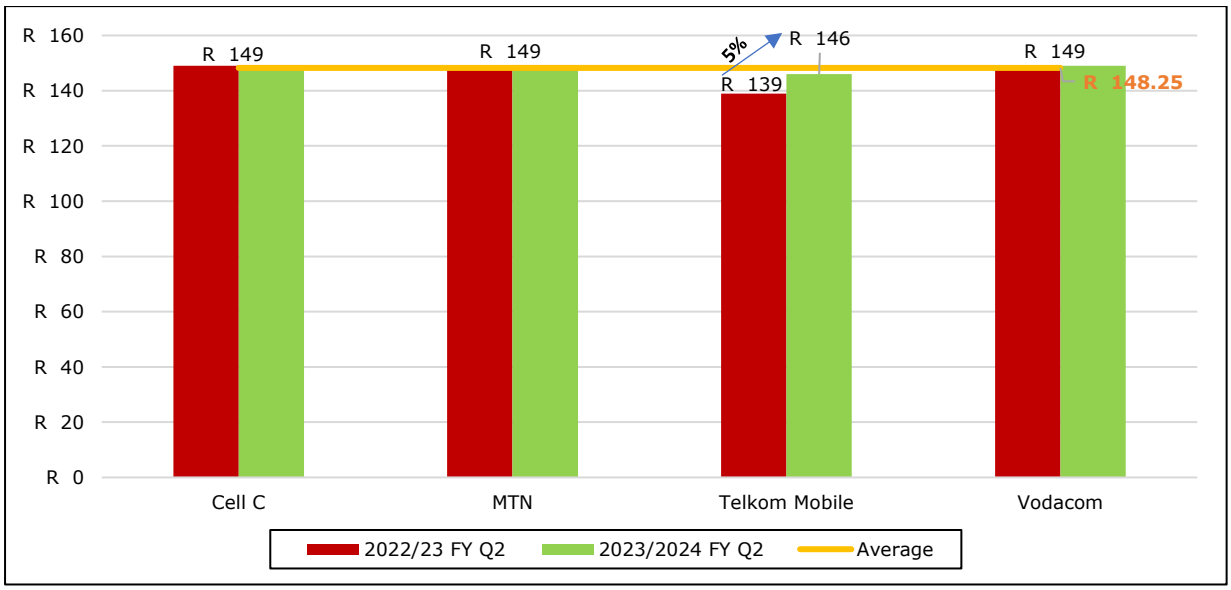


Source: ICASA Database Based on Filed Tariff Notifications

The figure above indicates that MTN was the only operator to amend the price of the 1GB data bundle from R 85 to R 79 in the period under review, matching Telkom Mobile's 1GB price. Cell C and Vodacom currently offer the least affordable 1GB data bundle among the four operators, which is priced at R 85. On average, the 30-day standard prepaid 1GB data bundle is offered at R 82.

Figure 3 below shows the price amendment on the standard 30-day prepaid 2GB data bundles, where Telkom Mobile increased the price of its 2GB data bundle by R 7 from R 139 to R 146.

Figure 3: 2022/23 FY Q2 to 2023/24 FY Q2 Data Price changes for 2GB standard 30-day prepaid data bundles



Source: ICASA Database Based on Filed Tariff Notifications

As shown above in figure 3, only Telkom Mobile amended the price of its 2GB data bundle. Despite the price increase, the operator still offers the most affordable 30-day standard prepaid data bundle among the four operators, which is R 3 less than what Cell C, MTN and Vodacom charge for their 2GB data bundles. On average, the 30-day standard prepaid 2GB data bundle costs customers R 148.25 in the market.

Additionally, Telkom Mobile also increased the prices of its 30-day standard prepaid 3GB, 5GB, 10GB, 20GB, 50GB and 100GB data bundles to R 209 (5%), R 314 (5%), R 493 (5.1%), R 734 (5%), R 1 574 (5%) and R 2 624 (5%), respectively.

On the 30-day standard prepaid 3GB data bundles, Telkom Mobile's price currently ranks second highest in terms of 3GB data bundle prices compared to the other MNOs, charging 5% more than MTN and Cell C (i.e., R 199), and 8.7% less than Vodacom's 3GB which is priced at R 229. Therefore, Vodacom charges the highest price on the 3GB data bundle among the four MNOs.

In the 5GB to 6GB data bundle range, Telkom Mobile's price increase of its 30-day prepaid 5GB data bundle to R 314 has resulted in the bundle being priced the

highest, which is 5% higher than MTN's 5GB data bundle price (i.e., R 199). On the other hand, Vodacom and Cell C offer 6GB data bundles which are priced at R 299 and R 349, respectively. Therefore, in terms of in-bundle rates, Cell C offers more value for money at R 0.05 per MB, while MTN, Vodacom and Telkom Mobile's in-bundle rates are at R 0.06 per MB.

On the 30-day prepaid 10GB data bundles, Telkom Mobile currently offers the least affordable data bundle at R 493 which was increased by R 24 (or 5%) from R 469, and is 5% higher than what Cell C, MTN and Vodacom charge (i.e., R 469).

On the 30-day prepaid 20GB to 40GB data bundle range, Telkom Mobile's 20GB offers customers the least value for money as it increased from R 699 to R 734, which translates to a R 0.002 increase in the in-bundle rate from R 0.034 per MB to R 0.036 per MB. MTN's 20GB data bundle has the second highest in-bundle rate at R 0.03 per MB and is priced at R 599. It should be noted that Vodacom and Cell C offer customers 30GB and 40GB which are priced at R 699 and R 489, with in-bundle rates at R 0.02 per MB and R 0.01 per MB, respectively.

Despite the price increase in Telkom Mobile's 100GB from R 2 499 to R 2 624, it is still priced the second highest among the MNOs. MTN and Vodacom both offer the lowest price for the 100GB data bundle at R 999. Cell C offers the highest price for the 100GB data bundle among the MNOs, which is 200% higher than both Vodacom and MTN's price, and 14.3% higher than Telkom Mobile's price.

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

2.1.1.1.2.1. MTN Bundles Validity/Expiry

MTN filed its amendment to the bundles' validity period with the Authority on 08 February 2023 and 14 March 2023, wherein it changed the validity of the daily bundles. The validity of the bundles was extended from expiring at midnight of

the day of purchase, to being valid for 24 hours from the time of purchase[6]. The operator also extended the validity of the bundles below by one day to allow customers to receive the full benefit of the bundle:

- Day bundles;
- 7-Day (Weekly) bundles;
- 14-Day (Fortnightly) bundles;
- 20-Day bundles;
- 30-Day (Monthly) bundles;
- 60-Day bundles;
- 90-Day (3-Month) bundles;
- 120-Day bundles;
- 180-Day (6 Month) bundle; and
- 360-Day bundles.

MTN's amendment came to effect on 17 February 2023.

2.1.1.1.2.2. Vodacom Student Data Bundles

Vodacom filed its Student Data Bundles with the Authority on 13 February 2023, wherein it offers student customers discounted data bundles comprising of Anytime/All Access and Night Owl data bundles. Students' MSISDNs need to be registered with one of the participating university and tertiary education partners to qualify for the once-off Student Bundles. Table 5 below shows Vodacom's Student Data Bundles.

Table 5: Vodacom Student Data Bundles

Student Bundle	Validity	Bundle Price (Incl. VAT)
5GB All Access + 5GB Night Owl	14 days	R 49
10GB All Access + 10GB Night Owl	30 days	R 79
15GB All Access + 15GB Night Owl	30 days	R 129
20GB All Access + 20GB Night Owl	30 days	R 149
25GB All Access + 25GB Night Owl	30 days	R 179
30GB All Access + 30GB Night Owl	30 days	R 199

Source: ICASA Database based on Filed Tariff Notifications

[6] More information regarding the Bundles Validity can be found the Authority's database and may be made available upon request. In the case where the operator requested confidentiality, the Authority will liaise with such operator before sharing the requested information.

The bundles are made available via the *123# USSD. Students can extend the validity period of the initially purchased bundle by purchasing additional bundles of the same size before the initial bundle expires. The purchase of the additional bundles will result in the validity period being extended and calculated from the date that you purchased the additional bundles.

Vodacom introduced its Student Data Bundles in the market on 09 March 2023.

2.1.1.1.2.3. Telkom Mobile Hourly Data Bundles

Telkom Mobile filed its Hourly data bundles with the Authority on 17 February 2023. The Telkom Mobile Hourly data bundles entail data bundles ranging from 150MB to 500MB and priced between R 5 to R 15. Table 6 below details the Telkom Mobile Hourly data bundles.

Table 6: Telkom Mobile Hourly data bundles

Product Description	Validity	Price (Incl. VAT)	In-bundle Rate (Rand per MB)
150MB	1 hour	R 5	R 0.03
300MB	1 hour	R 8	R 0.03
250MB	3 hours	R 10	R 0.04
400MB	3 hours	R 12	R 0.03
500MB	12 hours	R 15	R 0.03

Source: ICASA Database based on Tariff Notifications

The Telkom Mobile Hourly data bundles were launched on 01 March 2023.

2.1.1.1.2.4. MTN MoMo Rush Hour Bundles

MTN's amendment to its MoMo Rush Hour Bundles was filed with the Authority on 02 May 2023. The amendment entailed a price adjustment of the hourly bundles, as shown in table 7 below.

Table 7: MTN MoMo Rush Hour Bundles

Bundle	Previous Subscription Fee	Current Subscription Fee	Price Difference	Variance (%)
MoMo Rush Hour 1GB	R 2	R 5	R 3	150%
MoMo Rush Hour 300MB	R 1	R 2	R 1	100%

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the operator increased the prices of the MoMo Rush Hour 300MB and 1GB bundles by 100% and 150%, from R 1 and R 2 to R 2 and R 5, respectively.

MTN's amendment to the MoMo Rush Hour Bundles came to effect on 11 May 2023.

2.1.1.1.2.5. MTN MoMo Rush Hour Onboarding Offer

MTN filed its MoMo Rush Hour Onboarding Offer with the Authority on 02 May 2023, wherein customers who sign up for the MoMo service are able to purchase the 300MB Rush Hour MoMo Bundle for R 1 during the first 30 days after they sign up. The price will revert to R 2 after the 30 days has lapsed.

MTN's Rush Hour Onboarding Offer was introduced in the market on 11 May 2023.

2.1.1.1.2.6. Telkom Mobile Data-On-The Go Bundles

Telkom Mobile filed amendments of its On-The-Go Bundles with the Authority on 17 March and 23 May 2023. The amendments of the Telkom Mobile Data-On-The-Go Bundles entailed price adjustments in data bundles and OOB rates ranging from 5% to 21%. Table 8 below details the amendments of the Telkom Mobile Data-On-The-Go Bundles.

Table 8: Telkom Mobile Data-On-The-Go Bundles

17 March 2023				
Product Description	**Previous Price (Incl. VAT)**	**Current Price (Incl. VAT)**	**Difference**	**Variance (%)**
5GB	R 59	R 62	R 3	5%
10GB	R 99	R 104	R 5	5.1%
5GB TopUp	R 59	R 62	R 3	5.1%
10GB TopUp	R 99	R 104	R 5	5.1%
5GB Once-Off Bundle	R 59	R 62	R 3	5.1%
10GB Once-Off Bundle	R 99	R 104	R 5	5.1%
5GB Recurring Bundle	R 59	R 62	R 3	5.1%
10GB Recurring Bundle	R 99	R 104	R 5	5.1%
Out of Bundle rates:				
SMS	R 0.30	R 0.35	R 0.05	16.7%
Data	R 0.32	R 0.35	R 0.03	9.4%
23 May 2023				

Product Description	Previous Price (Incl. VAT)	Current Price (Incl. VAT)	Difference	Variance (%)
5GB	R 62	R 75	R 13	21%
10GB	R 104	R 109	R 5	4.8%
5GB TopUp	R 62	R 75	R 13	21%
10GB TopUp	R 104	R 109	R 5	4.8%

Source: ICASA Database based on Tariff Notifications

The largest price increase in absolute and percentage terms of R 13 or 21% occurred on the 5GB and 5GB TopUp Telkom Mobile Data-On-The Go Bundles, which both increased from R 62 to R 75.

The amendments of the Telkom Mobile Data-On-The-Go Bundles became effective 01 April and 01 June 2023 respectively.

2.1.1.1.2.7. Vodacom NXT LVL Bundles

Vodacom filed an amendment to its NXT LVL Bundles with the Authority on 03 May 2023. The amendment entailed an adjustment to the allocation of data bundles in the prepaid/hybrid integrated bundle as shown in table 9 below.

Table 9: Vodacom NXT LVL Bundle

Vodacom NXT LVL Bundles	Description	Allocation	Once-off/Recurring	Validity	Price (Incl. VAT)
Previous Integrated Bundle	5GB + 5GB Social + 10GB Night Owl	5GB + 5GB Social + 10GB Night Owl	Once-off	7-days	R 49
Current Integrated Bundle	4GB + 4GB Super Social + 12GB Night Owl	4GB + 4GB (1GB WhatsApp+1GB Facebook+ 1GB TikTok + 1GB YouTube) + 12GB Night Owl	Once-off	7-days	R 49

Source: ICASA Database based on Tariff Notifications

As shown in table 9 above, the standard and social bundle allocations were respectively reduced from 5GB to 4GB, and the Night Owl bundle was increased by 2GB from 10GB to 12GB. No adjustment was made on the validity and price of the bundle, which is valid for 7 days and remains priced at R 49.

Vodacom's amendment came to effect on 10 May 2023.

2.1.1.1.2.8. MTN Data Out of Bundle Rates

MTN filed an amendment to its Data Out of Bundle Rates with the Authority on 08 June 2023, following the notification filed on 18 May 2023. On the latter date, a flat out-of-bundle data rate of R 0.25 per MB was applied to all prepaid customers across all price plans. MTN amended the OOB rates by introducing a dynamic OOB data rate of R 0.25 per MB only to non-data customers and RGS15 customers.

Customers on the Bundle Bonanza price plan reverted to R 0.29 per MB OOB data rate, while other prepaid price plans were reverted to R 0.49 per MB for data users and R 0.29 per non-data users.

MTN's amendment came to effect on 16 June 2023.

2.1.1.1.2.9. MTN 3-Day 1.5GB Bundle

MTN filed its 3-Day 1.5GB Bundle with the Authority on 13 June 2023 wherein it offers PAYG customers a 3-day 1.5GB data bundle at a retail price of R 40. This translates to an in-bundle rate of R 0.03 per MB.

This 3-Day 1.5GB Bundle was introduced in the market on 26 June 2023.

2.1.1.1.2.10. MTN Anytime Data Bundles

MTN filed an amendment to its data bundles portfolio with the Authority on 26 June 2023. The amendment entailed an introduction of new data bundles on standard anytime data bundles and an amendment of personalised data bundles. Table 10 below details the amendment.

Table 10: MTN Data Bundles

MTN Bundles	Inclusive value	Validity	Price (Incl. VAT)	In-bundle Rate (Rand per MB)
30MB Anytime	30MB	Hourly	R 3	R 0.09
120MB Anytime	120MB	Hourly	R 6	R 0.05
60MB Anytime	60MB	Weekly	R 10	R 0.16
1GB Anytime	1GB	Weekly	R 65	R 0.51
120MB Anytime	120MB	Monthly	R 20	R 0.16
500MB Anytime	500MB	Monthly	R 65	R 0.13

1GB Anytime	1GB	Monthly	R 79	R 0.08

Source: ICASA Database based on Filed Tariff Notifications

As shown in the table above, the operator introduced new additional hourly, weekly and monthly data bundles in their portfolio. MTN's 1GB weekly data bundle realised a R 5 or 7.1% price decrease from R 70 (as analysed in the 2022/23 FY Q2 Bi-annual Report[7]) to R 65. This makes the MTN's weekly 1GB data bundle the most affordable when compared to other MNOs. Cell C and Vodacom both offer their respective weekly 1GB data bundles for R 69 (6.2% more), while Telkom Mobile charges R 75 (13.3% more). Table 11 below shows the amendment on the Personalised Data Bundles.

Table 11: MTN Personalised Data Bundles

Previous MTN Personalised Bundles	Current Volume	Validity	Previous Price (Incl. VAT)	Current Price (Incl. VAT)	Price Difference	Variance (%)
Personalised - 50MB	60MB	Weekly	R 5	R 5	R 0	0%
Personalised - 50MB	60MB	Weekly	R 8	R 8	R 0	0%
Personalised - 50MB	60MB	Weekly	R 7	R 7	R 0	0%
Personalised - 50MB	60MB	Weekly	R 10	R 10	R 0	0%
Personalised - 1GB	1GB	Weekly	R 65	R 59	-R 6	-9.2%
Personalised - 1GB	1GB	Weekly	R 60	R 59	-R 1	-1.7%
Personalised - 2GB	2GB	Weekly	R 79	R 69	-R 10	-12.7%
Personalised - 2GB	2GB	Weekly	R 90	R 85	-R 5	-5.6%
Personalised - 100MB	120MB	Monthly	R 10	R 10	R 0	0%
Personalised - 100MB	120MB	Monthly	R 15	R 15	R 0	0%
Personalised - 100MB	120MB	Monthly	R 20	R 20	R 0	0%
Personalised - 500MB	500MB	Monthly	R 60	R 49	-R 11	-18.3%
Personalised - 500MB	500MB	Monthly	R 69	R 59	-R 10	-14.5%
Personalised - 1GB	1GB	Monthly	R 79	R 69	-R 10	-12.7%
Personalised - 1GB	1GB	Monthly	R 85	R 79	-R 6	-7.1%
Personalised - 1GB+1GB	1GB+1GB	Monthly	R 99	R 79	-R 20	-20.2%

Source: ICASA Database based on Filed Tariff Notifications

As shown in the table above, the amendment entailed the volume adjustments of selected data bundles and/or price reductions of selected data bundles. For example, the Personalised 100MB was upsized by 20MB to 120MB while the prices remained unchanged at R 15 and R 20. On the other hand, the Personalised - 1GB+1GB bundle realised a R 20 or 20.2% price decrease from R 99 to R 79.

[7] Page 28, available online at: < https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-quarter-2-2022-23-jan-jun > Accessed on 25 August 2023.

MTN's amendment came to effect on 14 July 2023.

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

This section 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, only MTN filed an amendment to its weekly data bundles, wherein it upsized the 50MB to 60MB while the price remained unchanged and reduced the price of the 1GB from R 70 to R 65, as analysed in 2.1.1.1.2.10 (page 31) above. As such, all prevailing prices for the standard daily and weekly mobile data bundles can be found in the 2022/23 FY Q2 Bi-annual Tariff Analysis Report, which was published on ICASA's website[8].

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 connected[9]. 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. MTN Home Data Bundles

MTN introduced its Home Data Bundles plan with the Authority on 05 January 2023. The plan comprises of URL-specific data bundles which are available to qualifying consumers as determined by the operator. The data bundles give

[8] Pages 27-29, available online at: < https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-quarter-2-2022-23-jan-jun > Accessed on 17 July 2023.

[9] 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.

customers access to online meeting applications such as Zoom, WebEx, Google Hangout, Microsoft classroom, Microsoft teams and Skype. Table 12 below shows the Home Data Bundles.

Table 12: MTN Home Data Bundles

Bundle	Price (Incl. VAT)	In-bundle Rate (Rand per MB)
Monthly Home 100MB	R 12	R 0.12
Monthly Home 250MB	R 29	R 0.11
Monthly Home 500MB	R 45	R 0.09
Monthly Home 1GB	R 60	R 0.06
Monthly Home 2GB	R 99	R 0.05
Monthly Home 5GB	R 199	R 0.04
Monthly Home 10GB	R 259	R 0.03
Monthly Home 20GB	R 359	R 0.02
Monthly Home 30GB	R 399	R 0.01
Monthly Home 50GB	R 499	R 0.01

Source: ICASA Database based on Filed Tariff Notifications

As shown in the table above, the bundles offered to customers range from 100MB to 50GB and all have a 30-day validity period. The in-bundle rates range from R 0.01 to R 0.12 per MB.

MTN's Home Data Bundles plan was introduced in the market on 17 January 2023.

2.1.2.2. MTN Streaming Data Bundles

MTN's Streaming Data Bundles filed with the Authority on 06 January 2023 entails a range of URL-specific video and music streaming data bundles offered to qualifying customers as determined by the operator. The video streaming bundles enable customers access to video streaming platforms such as Showmax and DSTV Now, while music streaming bundles enables access to music content platforms such as Deezer and Apple Music. Table 13 below details the streaming data bundles.

Table 13: MTN Streaming Data Bundles

Bundle	Price (Incl. VAT)	In-bundle Rate (Rand per MB)
MTN Music Streaming		
MTN Music Streaming 1GB	R 49	R 0.05
MTN Music Streaming 3GB	R 99	R 0.03
MTN Music Streaming 5GB	R 149	R 0.03
MTN Music Streaming 10GB	R 299	R 0.03
MTN Video Streaming		
MTN Video Streaming 5GB	R 159	R 0.03
MTN Video Streaming 10GB	R 299	R 0.03
MTN Video Streaming 20GB	R 499	R 0.02

Source: ICASA Database based on Filed Tariff Notifications

As shown in the table above, the low prices attached to the bundles are reflected by the in-bundle rates ranging from R 0.02 to R 0.05 per MB. It should be noted that the bundles are valid for 30 days.

It is worth noting that Vodacom offers its 850MB music streaming bundle for R 49, which is 150MB less than what MTN offers for the same monetary value.

MTN introduced its Streaming Data Bundles in the market on 17 January 2023.

2.1.2.3. Cell C K'nect Mobile Variety Bundles

Cell C filed an amendment of its K'nect Mobile Variety Bundles with the Authority on 10 February 2023. The amendment of Cell C's K'nect Mobile Variety Bundles entailed the addition of new bundles on the plan, offering voice, SMS, and data to customers. Table 14 below details the Cell C K'nect Mobile Variety Bundles.

Table 14: Cell C K'nect Mobile Variety Bundles

Bundle size	Expiry	Price (Incl. VAT)
KNECT YOUTUBE BUNDLE 1GB	30 Days	R 34.99
KNECT FACEBOOK BUNDLE 1GB	30 Days	R 34.99
KNECT TIK-TOK BUNDLE 1GB	30 Days	R 34.99
KNECT WHATSAPP BUNDLE 1GB	30 Days	R 34.99
KNECT STANDARD DATA BUNDLE 30MB	60 Days	R 3.50
KNECT STANDARD DATA BUNDLE 50MB	60 Days	R 5
KNECT STANDARD DATA BUNDLE 100MB	60 Days	R 10.01
KNECT STANDARD DATA BUNDLE 250MB	60 Days	R 20
KNECT STANDARD DATA BUNDLE 500MB	60 Days	R 34.99
KNECT STANDARD DATA BUNDLE 1GB	60 Days	R 39
KNECT STANDARD DATA BUNDLE 2GB	60 Days	R 75
KNECT STANDARD DATA BUNDLE 5GB	60 Days	R 149.01
KNECT STANDARD DATA BUNDLE 10GB	60 Days	R 250
KNECT STANDARD DATA BUNDLE 20GB	60 Days	R 350

Product Description	Kombo Bundles Data/Voice & SMS Provided (MB)	Expiry	Price (Incl. VAT)
KNECT KOMBO R75 BUNDLE	50 Min	60 Days	R 50
	501MB		R 34.99
	100 SMS		R 48.99
KNECT KOMBO R120 BUNDLE	100 Min	60 Days	R 100
	1025MB		R 39
	200 SMS		R 97.99

Source: ICASA Database based on Tariff Notifications

It should be noted that Cell C's 30-day 1GB K'nect WhatsApp bundle which is priced at R 34.99 can be compared to Vodacom's 30-day 1GB Social Bundles WhatsApp bundle (filed on 10 January 2022)[10] priced at R 35, which is R 0.01 or 0.03% more. The amendment of the Cell C K'nect Mobile Variety Bundles became effective on 22 February 2023.

2.1.2.4. Vodacom VIU Data Bundles

Vodacom filed an amendment to its VIU Data Bundles with the Authority on 07 March 2023. The operator initially filed its plan on 26 April 2022, wherein it offers customers data bundles to stream and/or to access the VIU application. VIU is an over-the-top (OTT) video streaming platform to which customers can subscribe.

The amendment entailed a price increase of the daily 250MB by R 2 or 40%, from R 5 to R 7, translating to an increase in the in-bundle rate from R 0.02 to R 0.03 per MB. Vodacom's amendment to its VIU Data Bundles came to effect on 16 March 2023.

2.1.2.5. Telkom MobileSocial Media Data Bundles

Telkom Mobile filed an amendment of its Social Media Data Bundles with the Authority on 17 March 2023. The amendment of the Telkom Mobile Social Media Data Bundles entailed price increases on daily, weekly and monthly social media bundles ranging from 2.9% to 25%. Table 15 below details the amendment of the Telkom Mobile Social Media Data Bundles.

Table 15: Telkom Mobile Social Media Data Bundles

Daily Social Bundles				
Product Description	**Previous Price (Incl. VAT)**	**Current Price (Incl. VAT)**	**Difference**	**Variance (%)**
25MB	R 2	R 2.50	R 0.50	25%
50MB	R 3	R 3.50	R 0.50	16.7%
75MB	R 4	R 4.50	R 0.50	12.5%

[10] Page 30, available online at: < Retail Tariffs Report Quarter 2 2022/23 (Jan - Jun) — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 10 July 2023

100MB	R 5	R 5.50	R 0.50	10%
500MB	R 15	R 16	R 1	6.7%
Weekly Social Bundles				
75MB	R 5	R 5.50	R 0.50	10%
100MB	R 8	R 9	R 1	12.5%
500MB	R 18	R 19	R 1	5.6%
1GB	R 35	R 36	R 1	2.9%
Monthly Social Bundles				
100MB	R 10	R 10.50	R 0.50	5%
250MB	R 15	R 16	R 1	6.7%
500MB	R 25	R 28	R 3	12%
1GB	R 40	R 42	R 2	5%
2GB	R 70	R 74	R 4	5.7%
3GB	R 100	R 105	R 5	5%

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the largest price increase in percentage terms of 25% occurred on the 25MB Telkom Mobile Daily Social bundle which increased from R 2 to R 2.50.

The amendment of the Telkom Mobile Social Media Data Bundles became effective on 01 April 2023.

2.1.2.6. Telkom Mobile Chat Bundles

Telkom Mobile filed an amendment of its Chat Bundles with the Authority on 17 March 2023. The amendment of the Telkom Mobile Chat Bundles entailed price increases ranging from 2.9% to 17% on certain packages on the plan. Table 16 below details the amendment of the Telkom Mobile Chat Bundles.

Table 16: Telkom Mobile Chat Bundles

Product Description	Previous Price (Incl. VAT)	Current Price (Incl. VAT)	Difference	Variance (%)
Daily CHAT 50MB	R 3	R 3.50	R 0.50	16.7%
Daily CHAT 100MB	R 5	R 5.50	R 0.50	10%
Daily CHAT 250MB	R 10	R 10.50	R 0.50	5%
Daily CHAT 500MB	R 15	R 16	R 1	6.7%
Weekly CHAT 100MB	R 8	R 9	R 1	12.5%
Weekly CHAT 1GB	R 35	R 36	R 1	2.9%
Monthly CHAT 250MB	R 15	R 16	R 1	6.7%
Monthly CHAT 500MB	R 25	R 28	R 3	12%
Monthly CHAT 1GB	R 40	R 45	R 5	12.5%
Monthly CHAT 2GB	R 70	R 75	R 5	7.1%

Source: ICASA Database based on Tariff Notifications

As displayed in the table above, the largest price increase in percentage terms of 17% occurred on the Daily CHAT 50MB bundle which increased from R 3 to R 3.50.

The amendment of the Telkom Mobile Chat Bundles became effective on 01 April 2023.

2.1.2.7. *Telkom LIT Streaming Bundles*

Telkom filed an amendment of its LIT Streaming Bundles with the Authority on 17 March 2023. The amendment of the Telkom LIT Streaming Bundles entailed price adjustments on daily, weekly and monthly data bundles. Table 17 below details the amendment of the Telkom LIT Streaming Bundles.

Table 17: Telkom LIT Streaming Bundles

Daily LIT Streaming Bundles (24 hour validity)				
Product Description	**Previous Price (Incl. VAT)**	**Current Price (Incl. VAT)**	**Difference**	**Variance (%)**
75MB	R 4	R 5	R 1	25%
100MB	R 7	R 8	R 1	14.3%
250MB	R 13	R 14	R 1	7.7%
500MB	R 20	R 16	-R 4	-20%
1GB	R 30	R 21	-R 9	-30%
2GB	R 50	R 32	-R 18	-36%
Weekly LIT Streaming Bundles (7 day validity)				
250MB	R 15	R 16	R 1	7%
500MB	R 25	R 27	R 2	8%
1GB	R 40	R 42	R 2	5%
2GB	R 70	R 74	R 4	5.7%
3GB	R 100	R 105	R 5	5%
5GB	R 150	R 158	R 8	5.3%
Monthly LIT Streaming Bundles (31 day validity)				
500MB	R 40	R 42	R 2	5%
1GB	R 60	R 63	R 3	5%
2GB	R 100	R 105	R 5	5%
3GB	R 140	R 147	R 7	5%
5GB	R 200	R 210	R 10	5%
10GB	R 280	R 294	R 14	5%
25GB	R 350	R 368	R 18	5.1%
50GB	R 400	R 420	R 20	5%

Source: ICASA Database based on Tariff Notifications

The largest price reduction in absolute and percentage terms of R 18 or 36% occurred on the 2GB Daily LIT Streaming bundle, which reduced from R 50 to R 32.

The amendment of the Telkom LIT Streaming Bundles became effective on 01 April 2023.

2.1.2.8. MTN Multi URL Video Streaming Bundles

MTN filed its Multi URL Video Streaming Bundles with the Authority on 28 March 2023 wherein it offers customers data bundles to stream and access OTT video streaming platforms, namely Netflix, ShowMax, Amazon Prime Video, DSTV Now, Disney+, Pluto and VIU. Table 18 below shows the streaming bundles.

Table 18: Source: MTN Multi URL Video Streaming Bundles

MTN Video Streaming Bundle Description	Validity	Volume	Price (Incl. VAT)	In-bundle Rate (Rand per MB)
MTN Multi URL video streaming -Daily 1GB	Daily	1GB	R 20	R 0.02
MTN Multi URL video streaming -weekly 2GB	Weekly	2GB	R 50	R 0.02
MTN Multi URL video streaming -weekly 5GB	Weekly	5GB	R 99	R 0.02
MTN Multi URL video streaming -monthly 3GB	Monthly	3GB	R 99	R 0.03
MTN Multi URL video streaming -monthly 10GB	Monthly	10GB	R 149	R 0.01

Source: ICASA Database based on Filed Tariff Notifications

MTN offers customers data bundles ranging from 1GB to 10GB with prices ranging from R 20 to R 149, which translates to low in-bundle rates ranging from R 0.01 to R 0.03 per MB.

MTN's Multi URL Video Streaming Bundles were launched in the market on 11 April 2023.

2.1.2.9. Telkom Mobile Tik Tok Data Bundles

Telkom Mobile filed its Tik Tok Data Bundles with the Authority on 16 May 2023 which entailed Tik Tok data bundles ranging from 150MB to 1GB with varying validity periods. Table 19 below details the Telkom Mobile Tik Tok data bundles.

Table 19: Telkom Mobile Tik Tok data bundles

Product Description	Validity	Price (Incl. VAT)	In-bundle Rate (Rand per MB)
150MB	24 Hours	R 5	R 0.03
300MB	24 Hours	R 10	R 0.03
300MB	7 Days	R 14	R 0.05
600MB	7 Days	R 20	R 0.03
250MB	2 Days	R 10	R 0.04
500MB	2 Days	R 15	R 0.03
1GB	31 Days	R 35	R 0.03

Source: ICASA Database based on Tariff Notifications

The Telkom Mobile Tik Tok data bundles were launched on 26 May 2023.

2.1.2.10. MTN Ayoba Social Messaging Free Access

MTN filed an amendment to the Ayoba Social Messaging App with the Authority on 23 June 2023 wherein it amended its previous offering of free data upon customer registration.

The operator upsized the bundle from 250MB to 1GB. The base price plan rate will apply on the usage of the application upon depletion of the free bundle.

MTN's amendment to the Ayoba Social Messaging Free Access came to effect on 03 July 2023.

2.1.2.11. MTN Social Bundles

MTN's amendment to its Social Bundles was filed with the Authority on 26 June 2023. The amendment entailed an addition of new URL-specific data bundles as shown in table 20 below.

Table 20: MTN Social Bundles

Validity	Volume	Price (Incl. VAT)	In-bundle Rate
WhatsApp bundles			
Daily	50MB	R 3	R 0.06
Daily	250MB	R 7	R 0.03
3 Days	150MB	R 7	R 0.05
Weekly	300MB	R 12	R 0.04
Weekly	1GB	R 25	R 0.02
30 Days	1GB	R 40	R 0.04
Facebook and Instagram combo bundles			
Daily	250MB	R 7	R 0.03
Weekly	1GB	R 25	R 0.02
30 Days	1GB	R 40	R 0.04
Social Pass bundles			
Daily	350MB	R 10	R 0.04
Weekly	1GB	R 40	R 0.04
30 Days	2GB	R 75	R 0.02

Source: ICASA Database based on Filed Tariff Notifications

The operator introduced new daily, weekly and monthly data bundles with in-bundle rates ranging from R 0.02 to R 0.06 per MB, as shown in the table above.

A comparison can be made between MTN's WhatsApp bundles and Vodacom's WhatsApp Ticket. For example, Vodacom's daily 250MB is priced at R 5, while MTN offers the equivalent bundle for R 7, which is 40% higher than what Vodacom charges. On the other hand, Vodacom charges R 12 for its 250MB data bundle, while MTN offers a 300MB for the same monetary value.

MTN's additional Social Bundles were introduced in the market on 05 July 2023.

2.2. Analysis of Promotional Prepaid Data Tariffs

This section analyses the promotional prepaid data tariffs which were filed during the period under review. The promotional tariff plans are temporary and time-bound in nature, with generally a start and end date, which is also subject to being extended. The tariff/s analysed in this sub-section are those which had significant amendments effected and continue to be made available to customers post the report publication date (i.e., by or after 30 September 2023) while other promotional prepaid data tariffs, filed in the period under review are found on either Annexure A or Annexure B, depending on whether the promotion seized to exist in the market before or after 30 June 2023.

2.2.1. MTN MoMo App Download and First time Login Promotion

MTN's MoMo App Download and First time Login Promotion was filed with the Authority on 13 February 2023. The promotion rewards customers who download and transact via the MoMo App with a 1GB Data Bundle valid for 24 hours. The App enables customers to use their mobile phones, and other devices, to send and receive money, prepaid electricity, loans, retail purchases betting and bill payments. Customers can also use the App as a self-service channel wherein customers can make airtime and bundle purchases.

The promotion was made available in the market from 22 February 2023 until 31 December 2023.

2.2.2. MTN Device Value Add Promotion

MTN filed its Device Value Add Promotion with the Authority on 30 May 2023. The promotion rewards customers with free promotional data bundles upon purchasing qualifying devices and recharging with qualifying amounts. MTN aims to drive device migration from 3G to LTE and 5G technology devices and to encourage data adoption. Table 21 below shows the promotional offer in detail.

Table 21: MTN Device Value Add Promotional Offer

3G Device	LTE Device	5G Device
Value Adds- Once every 30 days x3		
• 3GB Anytime Data valid for 3 Days • YouTube bundle 250MB valid for 3 days	• 6GB Anytime Data valid for 3 Days • YouTube bundle 500MB valid for 3 days	• 7GB Anytime Data valid for 3 Days • YouTube bundle 1GB valid for 3 days
Unlocking Trigger		
• R 30 recharge (airtime or direct recharges) • Cumulative every 30 days from day of activation or device upgrade over 3 months	• R 30 recharge (airtime or direct recharges) • Cumulative every 30 days from day of activation or device upgrade over 3 months	• R 50 recharge (airtime or direct recharges) • Cumulative every 30 days from day of activation or device upgrade over 3 months

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the combination of the qualifying device and recharge value unlocks a specific promotional reward. For example, customers who purchase an LTE device and recharge with R 30 of airtime (on a once-off or cumulative basis) receive 6GB Anytime data valid for 3 days and a 500MB YouTube bundle valid for 3 days.

MTN's Device Value Add Promotion was launched in the market on 09 June 2023 and will be in the market until 31 October 2023.

2.3. Regulatory interventions underway to address costs to communicate.

The sub-sections below provide an update[11] of the regulatory interventions which are underway to address data costs.

2.3.1. End-User and Subscriber Service Charter Amendment Regulations

On 28 March 2023, the Authority published the End-user and Subscriber Service Charter Amendment Regulations 2023 with the Reasons Document in Government Gazette No 48318[12] and 48329[13] on 28 March 2023 and 29 March 2023, respectively. The amendment of these Regulations is aimed at promoting transparency, consumer protection, and ensuring high quality of service in the provision of communication services.

The proposed amendments were necessitated by the need to add new quality of service parameters for electronic communication services, as well as to adjust some existing ones, for the Authority to continue monitoring and enforcing compliance with customer care standards in a changing environment, and also introduce new regulations for voice, SMS, and data services. The proposed amendments were also necessitated by general concerns raised by various stakeholders, including consumer groups, with regard to data expiry rules, high out-of-bundle rates and rules, and out-of-bundle voice and SMS rules currently applied by licensees.

Given the urgency to protect the rights of consumers in an increasingly online digital market, the Authority proceeded with the implementation of the Quality of

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[11] These regulatory interventions were previously discussed in past Bi-annual Tariff Analysis report, with previous update is available in the 2022/23 FY Q4 Bi-annual Tariff Analysis Report which is available on ICASA's website: < https://www.icasa.org.za/legislation-and-regulations/bi-annual-tariffs-analysis-report-q4-2022-23 >

[12] Available on ICASA's website: < https://www.icasa.org.za/legislation-and-regulations/end-user-and-subscriber-service-charter-fourth-amendment-regulations-2023 > Accessed 18 July 2023.

[13] Available on ICASA's website: < https://www.icasa.org.za/legislation-and-regulations/reasons-document-for-the-end-user-and-subscriber-services-charter-amendment-regulations-2023 > Accessed 18 July 2023.

Service component of the existing regulations. However, amendments regarding the complex rules governing data expiry and data transfers will be the subject of a further round of consultations with stakeholders, given the strong views raised by stakeholders and the challenges of identifying a straightforward and feasible solution.

2.3.2. ICASA amendment of Annexure B of the Radio Frequency Spectrum Regulations in respect of short-range devices

On 23 May 2023, the Authority published the Amended Radio Frequency Spectrum Regulations, 2023[14]. The amendment regulations entailed an updated list (Annexure B) of radio apparatus whose use or possession shall not require a radio frequency spectrum license.

The amendment incorporates the lower 6 GHz frequency band (5 925 – 6 425 MHz) for Radio Local Access Networks (RLAN/Wi-Fi) Applications and the 122 – 246 GHz band for Non-Specific Short-range Applications in Annexure B of the Radio Frequency Spectrum Regulations. The incorporation of this band is expected to provide a boost for Wi-Fi availability and uptake to enable faster data communications between devices connected to wireless infrastructure, reduce latency, improve efficiency and data throughput.

2.3.3. Plans for additional IMT Spectrum

On 31 March 2023, the Authority published three Final Radio Frequency Spectrum Assignment Plans (RFSAPs) for International Mobile Telecommunications (IMT) Systems following an extensive notice and comment process to solicit views from interested stakeholders.

[14] Available on ICASA's website: < https://www.icasa.org.za/legislation-and-regulations/notice-to-amend-annexure-b-of-the-radio-frequency-spectrum-regulations-2023 > Accessed on 18 July 2023

The three spectrum bands, are:

- 450 MHz to 470 MHz (IMT450)[15];
- 835 MHz to 830 MHz and 870 MHz to 875 MHz (IMT850)[16]; and
- 1427 MHz to 1518 MHz (IMT1500)[17]

The Reasons Document stipulating the background and basis for the decisions made in finalising RFSAPs for the aforementioned bands can also be found on ICASA's website[18]. The bands dealt with in this set of RFSAPs are earmarked to be auctioned at a date to be communicated in future. These RFSAPs also make provisions to deal with incumbent users in IMT450 (Transnet) and IMT850 (Liquid).

The Authority plans to allocate the IMT450 band for digital and IMT services only, with the possible provision of exclusion zones for some government users. From the IMT 850 band, Liquid is to be migrated to the IMT900 band, thus freeing up the full IMT800 band for effective use by Licensees who bought IMT800 spectrum in the 2022 auction, once the analogue switch-off is complete. In the case of IMT1500, the Authority decided that the full 1427 - 1517 MHz is to be allocated to Mobile/Fixed Communications Networks Supplementary Downlink (MFCN SDL) and to IMT 5G-NR TDD/SDL.

On 09 June 2023, the Authority embarked on soliciting a consultant to aid with the licensing process for the IMT spectrum[19]. The licensing process is availing

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[15] Available on ICASA's website: < Final Radio Frequency Assignment Plan for the IMT450 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 18 July 2023

[16] Available on ICASA's website: < https://www.icasa.org.za/legislation-and-regulations/final-radio-frequency-assignment-plan-for-the-imt850 > Accessed on 18 July 2023

[17] Available on ICASA's website: < https://www.icasa.org.za/legislation-and-regulations/final-radio-frequency-assignment-plan-for-the-imt1500 > Accessed on 18 July 2023

[18] Available on ICASA's website: < https://www.icasa.org.za/legislation-and-regulations/radio-frequency-spectrum-regulations-reasons-document-imt-450-imt-850-imt-1500 > Accessed on 18 July 2023

[19] Available on ICASA's website: < https://www.icasa.org.za/news/2023/icasa-is-soliciting-a-consultant-to-assist-with-the-licensing-process-for-imt-spectrum > Accessed on 18 July 2023

spectrum resources on the IMT750, IMT800, IMT1500, IMT2300, IMT3300, and IMT3500 spectrum bands.

2.3.4. The Call Termination Regulations

The Authority published a notice[20] to commence with the Cost Modelling Phase on 26 May 2023, which follows the conclusion of the Market Review Phase which was discussed in the 2022-23FY Q4 Bi-annual Report[21]. The publication of the notice intended to outline the steps and timelines with respect to the cost modelling exercise, and to determine the efficient cost of providing wholesale voice call termination services, having determined in the Market Review Phase that there still exist competition issues in the call termination market that may require regulatory intervention.

The Cost Modelling Phase was structured as follows:

- Requesting for information from licensees with respect to the structure and population of Top-Down and Bottom-Up Cost Models. The request for information primarily took place in the form of questionnaires, accompanied with shell Top-down and Bottom-Up Cost Models. It is worth noting that the Authority published the aforementioned request for information on its website[22].
- Stakeholders were invited to submit written responses to the questionnaires, associated cost models or request for information within twenty-one (21) working days from the date of receiving the questionnaires and associated cost models or request for information.
- Holding of Workshop and Meetings to discuss the process and anticipated timelines for the cost modelling phase as provided for in the Stakeholder

[20] Available on ICASA's website: < https://www.icasa.org.za/legislation-and-regulations/call-termination-rate-review-notice > Accessed on 18 July 2023

[21] Pages 31-32. Available ICASA's website: < https://www.icasa.org.za/legislation-and-regulations/bi-annual-tariffs-analysis-report-q4-2022-23 > Accessed on 18 July 2023

[22] Available on ICASA's website: < https://www.icasa.org.za/legislation-and-regulations/inquiries/call-termination-rate-review > Accessed on 18 July 2023

Plan[23], provide clarification on questions on the questionnaires and associated templates of cost models and any other requests for information.

- The next phase will be the publication of the Draft Regulations in the Government Gazette, for public comment in terms of section 4 (1) of the ECA and section 4 (3) (j) of the ICASA Act and will be subject to public comments for a period of thirty (30) working days. Thereafter, the Authority will, if it deems it necessary to, hold public hearings and confirm the details of those hearings in a notice to be published on the Authority's website. The final stage is the publication of the Final Regulations (and, if necessary, an accompanying Reasons Document) by the Authority in the Government Gazette and on its website.

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 seven standard prepaid voice tariff notifications and amendments in the period under review from all four MNOs which are discussed in the next sub-sections.

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 four notifications in the period under review, as discussed in the next subsection.

2.4.1.1. *Vodacom Khosi Bonus Price Plan*

Vodacom filed its Khosi Bonus Price Plan with the Authority on 29 March 2023. The price plan is offered to prepaid customers who purchase a Khosi Bonus SIM

[23] Available on ICASA's website: < https://www.icasa.org.za/legislation-and-regulations/stakeholder-plan-call-termination-rate-review > Accessed on 18 July 2023

starter pack. Customers are charged R 1.55 per minute, R 0.52 per SMS, R 1.74 per SMS (international), and R 0.49 per MB of OOB rates. It should be noted that customers that recharge with at least R 12 receive 100% of bonus airtime, and bonus airtime depletes at R 3 per minute, R 3 per MB and R 1 per SMS.

Vodacom introduced its Khosi Bonus Price Plan in the market on 10 April 2023.

2.4.1.2. *Cell C Biz Connecta Prepaid Tariff Plan*

Cell C filed its Biz Connecta Prepaid Tariff Plan with the Authority on 01 March 2023. Cell C's Biz Connecta Prepaid Tariff Plan offers customers a standard integrated tariff plan with a promotional offer attachment offering integrated bundles. Table 22 below details the Cell C Biz Connecta Prepaid Tariff Plan.

Table 22: Cell C Biz Connecta Prepaid Tariff Plan

Tariff Plan Rates					
Data	R 0.40 (per MB)				
Voice calls (to any local network at any time)	R 1.50 (per minute)				
SMS (to any local network at any time)	R 0.50				
MMS	R 0.50				
International SMS	R 1.74				
International calls	As per international calling rates				
International roaming	As per country and individual network rates				
Promotional Offerings					
	4GB + 75 minutes	**10GB + 150 minutes**	**15GB + 180 minutes**	**20GB + 300 minutes**	**30GB + 750 minutes**
Price (Incl. VAT)	R 45	R 99	R 149	R 199	R 399
Validity	7 Days	7 Days	30 Days	30 Days	30 Days
Anytime Data	2GB	4GB	6GB	8GB	12GB
Nite Data	2GB	4GB	6GB	8GB	12GB
Business Data	N/A	2GB	2GB	3GB	5GB
WhatsApp Data Any-net Minutes	N/A	N/A	1GB	1GB	1GB
Any-net Minutes	25	50	60	100	250
On-net Minutes	50	100	120	200	500

Source: ICASA Database based on Tariff Notifications

The Cell C Biz Connecta Prepaid Tariff Plan was launched on 13 March 2023.

2.4.1.3. *MTN Bonus Bonanza Price Plan*

MTN filed an amendment to its OOB rates on its Bonus Bonanza price plan with the Authority on 25 April 2023. The amendment entailed the tariff adjustment of the OOB voice rate on the plan. It should be noted that the plan was initially filed

with the Authority on 02 November 2022. MTN's Bonus Bonanza plan rewards customers with 100% bonus airtime on all recharges of R 5 and more.

The operator increased the OOB voice rate by 51.5 % or R 0.51 from R 0.99 to R 1.50 per minute (billed per second).

MTN's amendment to the Bonus Bonanza Price Plan came to effect on 09 May 2023.

2.4.1.4. *Cell C UltraBonus 0.2 Prepaid Tariff Plan*

Cell C filed its UltraBonus 0.2 (Supa Bonus[24]) Prepaid Tariff Plan with the Authority on 15 June 2023. The UltraBonus 0.2 Prepaid Tariff Plan entails a tariff plan for new Cell C customers and offers customers voice calls on a per second basis, data, SMS and MMS. Table 23 below details the Cell C UltraBonus 0.2 Prepaid Tariff Plan.

Table 23: Cell C UltraBonus 0.2 Prepaid Tariff Plan

UltraBonus 0.2 Tariff Plan	
Product Description	**Price**
Data	R 0.40 (per MB)
Voice Calls (to any local network at any time)	R 1.49 (per minute - billed per second)
SMS (to any local network at any time)	R 0.50
MMS	R 0.50
International SMS	R 1.74
International Calls	As per international calling rates
International roaming	As per country and individual network rates
Bonus Airtime Depletion Rates:	
Data	R 2 (per MB)
Voice Calls (to any local network at any time)	R 2.50 (per minute - billed per second)
SMS (to any local network at any time)	R 0.50
MMS	R 0.50

Source: ICASA Database based on Tariff Notifications

Cell C customers on the UltraBonus 0.2 Prepaid Tariff Plan automatically receive free bonus airtime on every recharge, equal to the face value of the recharge plus bonus airtime (triple your recharge). The bonus airtime has the highest depletion priority with the earliest expiry date being midnight.

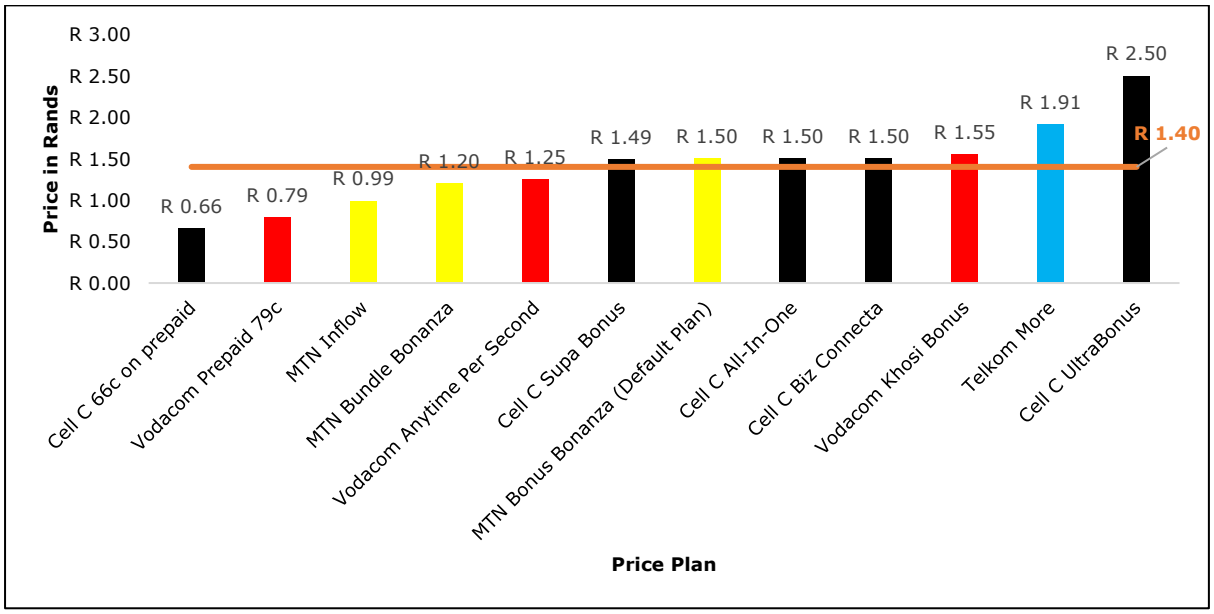
[24] Cell C filed with the Authority a name change for this tariff plan on 06 September 2023, it is now called Supa Bonus

The Cell C UltraBonus 0.2 Prepaid Tariff Plan was launched on 29 June 2023.

2.4.1.5. *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 highlighted in sub-section 2.4.1, the Authority received 5 notifications in the period under review, which were discussed above in 2.4.1.1 to 2.4.1.5, respectively. A graphical illustration is done in Figure 4 below of these tariff plans in comparison to other flat-rates offered by other MNOs, namely Cell C, MTN, Telkom Mobile and Vodacom.

Figure 4: Flat-rates per minute



Source: ICASA Database based on Filed Tariff Notifications

It can be deduced from the figure above that Cell C's 66c on Prepaid tariff plan still ranks first from the lowest to the highest flat-rate offered by the MNOs, and the Cell C Ultra Bonus ranks 10th (i.e., last) on the depicted flat-rate tariffs. On average, customers are charged R 1.40 per minute on OOB rate voice calls. Cell C's Supa Bonus flat-rate ranks 6th, while the Biz Connecta flat-rate ranks 7th among the depicted tariffs. The amendment on the OOB voice rate from R 0.99 to R 1.50 on MTN's Bonus Bonanza price plan also resulted in it shift from 3rd to

7th lowest OOB voice rate charge on the depicted rates, which is 7.1% above the average rate. Vodacom's new Khosi Bonus price plan ranks 8th which is 10.7% above the average rate. As shown in the figure above, six of the ten flat rates charge below the average flat-rate of R 1.40 per minute.

2.4.2. On-net focused tariffs

This sub-section provides an analysis of on-net focused tariff plans filed with the Authority in the period under review. On-net focused tariffs give subscribers substantial discounts for calling other subscribers on the same network. The Authority received two notifications in the period under review with respect to prepaid plans, as discussed in the next subsection.

2.4.2.1. *Telkom Mobile SIM SONKE Prepaid*

Telkom Mobile filed an amendment of its SIM SONKE Prepaid with the Authority on 17 March 2023. The amendment of the Telkom Mobile SIM SONKE Prepaid entailed price increases ranging from 5.3% to 20.7% on certain OOB rates on the plan. Table 24 below details the amendment of the Telkom Mobile SIM SONKE Prepaid.

Table 24: Telkom Mobile SIM SONKE Prepaid

Product Description	Previous Price	Current Price	Difference	Variance (%)
Voice (Telkom Mobile to Telkom Mobile)	R 0.29	R 0.35	R 0.06	20.7%
Voice (Telkom to other networks)	R 0.76	R 0.80	R 0.04	5.3%
MMS (300kb)	R 0.29	R 0.35	R 0.06	21%
Data (per MB)	R 0.32	R 0.35	R 0.03	9.4%

Source: ICASA Database based on Tariff Notifications

The MMS rates on the Telkom Mobile SIM SONKE Prepaid incurred the largest increase in percentage terms of 21%, increasing from R 0.29 to R 0.35 per MMS.

The amendment of the Telkom Mobile SIM SONKE Prepaid became effective on 01 April 2023.

2.4.2.2. *Telkom Mobile Thola More Prepaid Tariff Plan*

Telkom filed an amendment of its Thola More Prepaid Tariff Plan with the Authority on 17 March 2023. The amendment of the Telkom Thola More Prepaid Tariff Plan entailed price increases ranging from 8.7% to 16.7% on certain OOB rates on the plan. Table 25 below details the amendment of the Telkom Thola More Prepaid Tariff Plan.

Table 25: Telkom Thola More Prepaid Tariff Plan

Product Description	Previous Price	Current Price	Difference	Variance (%)
Voice (Telkom Mobile to Telkom Mobile)	R 0.30	R 0.35	R 0.05	16.7%
Voice (Telkom to other networks)	R 0.69	R 0.75	R 0.06	8.7%
Data (per MB)	R 0.32	R 0.35	R 0.03	9.4%

Source: ICASA Database based on Tariff Notifications

The on-net rate on the Telkom Thola More Prepaid Tariff Plan incurred the largest increase in percentage terms of 16.7%.

The amendment of the Telkom Thola More Prepaid Tariff Plan became effective on 01 April 2023.

2.4.3. Analysis of standard voice bundles billed per minute

2.4.3.1. *MTN Personalised On-Net Voice Bundles*

MTN filed an amendment to its Personalised On-net Voice Bundles with the Authority on 16 February 2023 wherein it adjusted the tariffs for its personalised on-net voice bundles on daily, weekly and monthly validity periods. Table 26 below shows a sample of the Personalised On-net Voice Bundles[25].

Table 26: MTN Personalised On-net Voice Bundles

MTN Daily Spend Bands	Inclusive value effort 1	Price (Incl. VAT)	Inclusive value effort 2	Price (Incl. VAT)	Inclusive value effort 3	Price (Incl. VAT)
0	5 minutes	R 1	30 minutes	R 3	110 minutes	R 5
0-2	10 minutes	R 2	30 minutes	R 3	110 minutes	R 5

[25] More information regarding MTN's Personalised On-net Voice can be found the Authority's database and may be made available upon request. In the case where the operator requested confidentiality, the Authority will liaise with such operator before sharing the requested information.

10-15	180 minutes	R 15	400 minutes	R 25	800 minutes	R 30
65-90	90 minutes	R 20	1200 minutes	R 100	N/A	N/A
MTN Weekly Spend Bands	**Inclusive value effort 1**	**Price (Incl. VAT)**	**Inclusive value effort 2**	**Price (Incl. VAT)**	**Inclusive value effort 3**	**Price (Incl. VAT)**
15-20	150 minutes	R 20	400 minutes	R 30	750 minutes	R 40
50-55	500 minutes	R 50	1240 minutes	R 80	2400 minutes	R 110
150-180	500 minutes	R 50	3000 minutes	R 230	N/A	N/A
MTN Monthly Spend Bands	**Inclusive value effort 1**	**Price (Incl. VAT)**	**Inclusive value effort 2**	**Price (Incl. VAT)**	**Inclusive value effort 3**	**Price (Incl. VAT)**
15-20	150 minutes	R 30	300 minutes	R 40	450 minutes	R 50
100-125	900 minutes	R 100	2000 minutes	R 150	3200 minutes	R 190
550-600	3500 minutes	R 300	20000 minutes	R 750	N/A	N/A

Source: ICASA Database based on Tariff Notifications

It should be noted that the personalised voice bundles are offered to customers through the *142#, *136*2#, *411# USSD codes, MTNApp & MoMo app.

MTN's amendment came to effect on 27 February 2023.

2.4.3.2. *Telkom Mobile All-net and On-net Voice Bundles*

Telkom Mobile filed an amendment of its All-net and On-net Voice Bundles with the Authority on 17 March 2023. The amendment entailed price increases ranging from 5.8% to 32.8% on certain packages. Table 27 below details the amendment of Telkom Mobile's All-net and On-net Voice Bundles.

Table 27: Telkom Mobile All-net and On-net Voice Bundles

Product Description	Previous Price (Incl. VAT)	Current Price	Difference	Variance (%)
All-net Voice Bundle				
1000min All-net voice minutes	R 400	R 531	R 131	32.8%
On-net Voice Bundles				
25min Telkom Mobile voice minutes	R 10.10	R 11	R 0.90	8.9%
50min Telkom Mobile voice minutes	R 20.25	R 22	R 1.75	8.6%
100min Telkom Mobile voice minutes	R 30.25	R 32	R 1.75	5.8%
200min Telkom Mobile voice minutes	R 60.50	R 64	R 3.50	5.8%
500min Telkom Mobile voice minutes	R 101	R 107	R 6	5.9%

Source: ICASA Database based on Tariff Notifications

The largest increase in absolute and percentage terms of R 131 or 32.8% occurred on the Telkom Mobile 1000min All-net voice minutes package which increased from R 400 to R 531.

The amendment of the Telkom Mobile All-net and On-net Voice Bundles became effective on 01 April 2023.

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. There were six standard and promotional integrated product offerings filed with the Authority during the period under review, these are analysed in the next sub-sections.

2.5.1. Analysis of Standard Prepaid Integrated Bundles

2.5.1.1. *Vodacom Integrated and Combo Bundles*

Vodacom filed its Integrated and Combo Bundles with the Authority on 11 April 2023. The operator offers customers integrated bundles with varying validity periods, as shown in tables 28 and 29 below.

Table 28: Vodacom Combo Bundles

Combo Bundle	Validity	Price (Incl. VAT)
100 minutes + 1.2GB	30 days	R 149
200 minutes + 3GB	30 days	R 299
200 minutes + 5GB	30 days	R 349
500 minutes + 15GB	30 days	R 699

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the Combo Bundles comprise of voice minutes and data bundles valid for 30 days, with prices ranging from R 149 to R 699. Table 29 below details the Integrated bundles.

Table 29: Vodacom Integrated Bundles

Integrated Bundle	Validity	Price (Incl. VAT)
30 ANAT minutes + 50MB	1 day	R 7.50
30 ANAT minutes + 150MB	1 day	R 10.50
30 ANAT minutes + 300MB	1 day	R 15
30 ANAT minutes + 500MB	1 day	R 21
30 ANAT minutes + 1GB	7 days	R 35
60 ANAT minutes + 50MB	7 days	R 13
60 ANAT minutes + 150MB	7 days	R 17
60 ANAT minutes + 300MB	7 days	R 21
60 ANAT minutes + 500MB	7 days	R 27
60 ANAT minutes + 1GB	30 days	R 39
100 ANAT minutes + 50MB	30 days	R 22

100 ANAT minutes + 150MB	30 days	R 25
100 ANAT minutes + 300MB	30 days	R 29
100 ANAT minutes + 500MB	30 days	R 35
100 ANAT minutes + 1GB	30 days	R 49

Source: ICASA Database based on Tariff Notifications

The table above shows that Vodacom offers more affordable integrated bundles. For example, customers can purchase a 30-day 100 all-net minutes and 1GB data for R 49, while Vodacom offers its 30-day standard prepaid data bundle for R 85.

Vodacom introduced its Integrated and Combo Bundles in the market on 18 April 2023.

2.5.2. Promotional Prepaid Integrated Plans

2.5.2.1. *Cell C CVM Bundles Promotion*

Cell C filed amendments of its CVM Bundles Promotion with the Authority on 20 January, 23 February, 04 April, 20 April, 02 June and 22 June 2023. The amendments entailed the addition of new CVM Bundles to the existing promotion. Table 30 below shows a sample[26] of the additional CVM Bundles filed in Q2 of the 2023/24 FY, as per the dates mentioned.

Table 30: Cell C CVM Bundles Promotion

Product Description	Validity	Price (Incl. VAT)
20 January 2023		
10MB	Until midnight	R 2
10MB + 10MB Free	Until midnight	R 2
20MB	Until midnight	R 3
20MB + 10MB Free	Until midnight	R 3
23 February 2023		
100MB	1 day	R 3
200MB	3 days	R 7
500MB	3 days	R 12
1GB	7 days	R 19
1GB	14 days	R 25
1.5GB	30 days	R 35
2GB	30 days	R 40
04 April 2023		

[26] More information regarding Cell C's CVM Bundles Promotion can be found the Authority's database and may be made available upon request. In the case where the operator requested confidentiality, the Authority will liaise with such operator before sharing the requested information.

1GB + 100 min	30 days	R 49
3GB + 300 min	7 days	R 139
250MB + 30 min	until midnight	R 9
20 April 2023 Data Bundles		
400MB	7 days	R 35
750MB	7 days	R 59
300MB	7 days	R 25
All-in-One Bundles		
15 min + 60MB	7 days	R 17
60 min + 1GB	7 days	R 84
60 min + 4GB	7 days	R 114
02 June 2023 Data bundles		
60MB	1 day	R 6
150MB	7 days	R 9
1.5GB	until midnight	R 29
Voice bundles		
15 minutes	until midnight	R 2
30 minutes	3 days	R 5
100 minutes	7 days	R 15
All-in-one bundles		
30MB + 15mins	until midnight	R 6
250MB + 20 mins	7 days	R 15
4GB + 60mins	7 days	R 109
22 June 2023 Data Bundles		
250MB	1 day	R 5
100MB	7 days	R 7
1GB	3 days	R 29
Voice Bundles		
60 mins	1 day	R 5
150 mins	3 days	R 35
300 mins	7 days	R 55
All-in-One Bundles		
500MB + 30 mins	1 day	R 11
250MB + 20 mins	7 days	R 15
1GB + 60 mins	1 day	R 17

Source: ICASA Database based on Tariff Notifications

The additions to the Cell C CVM Bundles Promotion ranged from normal data, voice bundles and integrated bundles to the benefit of customers. On 20 January 2023 Cell C filed a notification extending its Cell C CVM Bundles Promotion from 31 January 2023 to 30 April 2023, however, on 04 April 2023 the promotion was further extended, and it will be now available until 30 October 2023.

2.5.2.2. *MTN PAYG Delight Campaign Promotion*

MTN's Delight Campaign Promotion was filed with the Authority on 04 April 2023. The promotional offer rewards prepaid customers with free voice bundles, data bundles, or a combination of both, in accordance with the network availability in their regions. It is worth noting that there has been an impact on the availability of the network due to load shedding, as such some regions experienced a noticeable decline in network availability compared to others. The operator then classified customers as being in either a "stable" network region or "declining" or network region, depending on their location and network availability. Table 31 below shows the rewards in accordance with the customers' category.

Table 31: MTN Delight Campaign Promotion

Region Performance	Condition	Spend Classification	Customer Type	Segment	Delight Offer
Stable	>15 Days	<R 250	Mass - Data	1	Free 100MB - 1 hour
	>15 Days	<R 250	Mass - Voice	2	Free 5 minutes - 1 hour
	>15 Days	>R 250	HVC	3	Free 300MB - 1 hour
Decreasing	0-15 Days	Voice	Mass - Incoming Voice Only	4	Free 5 minutes - 1 hour
	0-15 Days	Voice + Data	Mass - Incoming + Non-data	5	Free 5 minutes + 50MB - 1 hour
	0-15 Days	Data	Mass - Outgoing Non-data	6	Free 100MB - 1 hour
	>15 Days	<R 250	Mass - Data	7	Free 150MB - 1 hour
	>15 Days	<R 250	Mass - Voice	8	Free 10 minutes - 1 hour
	>15 Days	>R 250	HVC	9	Free 500MB - 1 hour
Outlier	0-15 Days	Voice	Mass - Incoming Voice Only	4	Free 5 minutes - 1 hour
	0-15 Days	Voice + Data	Mass - Incoming + non-data	5	Free 5 minutes + 50MB - 1 hour
	0-15 Days	Data	Mass - Outgoing Non-data	6	Free 50MB - 1 hour
	>15 Days	<R 250	Mass - Data	7	Free 150MB - 1 hour
	>15 Days	>R 250	Mass - Voice	8	Free 10 minutes - 1 hour
	>15 Days	>R 250	HVC	9	Free 500MB - 1 hour
Default Delight				10	Free 50MB - 1 hour

Source: ICASA Database based on Tariff Notifications

As shown in the table above, customers who on a "stable" network for example, on the condition that they have been regarded as "stable" for more than 15 days and have spent more than R 250 and are considered high volume customers (HVC), they are eligible for a free 300MB valid for one hour.

MTN's Delight Campaign Promotion was made available in the market on 18 April 2023 and was anticipated to run until 30 June 2023. However, on 05 June 2023, MTN extended the promotional offer to run until 31 December 2023.

2.5.2.3. *Cell C Pocket Mobile Variety Bundles*

Cell C filed an amendment of its Pocket Mobile Variety Bundles with the Authority on 04 May 2023. The amendment of the Pocket Mobile Variety Bundles entailed data bundle upgrades.

Table 32 below details the amendment of the Cell C Pocket Mobile Variety Bundles.

Table 32: Cell C Pocket Mobile Variety Bundles

Product Description	Previous Data Bundle	Current Data Bundle	Validity	Price (Incl. VAT)
Green SIM R10K Family	1536MB	2048MB	30 days	R 169
Green SIM R10K Single	1536MB	2048MB	30 days	R 159
Green SIM R20K Family	2048MB	2560MB	30 days	R 239
Green SIM R20K Single	2048MB	2560MB	30 days	R 219
Green SIM R30K Family	2560MB	5120MB	30 days	R 289
Green SIM R30K Single	2560MB	5120MB	30 days	R 269

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the Green SIM R30K Family and Single experienced a doubling of data volume from 2560MB to 5120MB at no additional cost.

The amendment of the Cell C Pocket Mobile Variety Bundles became effective on 16 May 2023.

2.5.2.4. *Vodacom WhatsApp Messenger + Voice Integrated Bundle Promotion*

Vodacom's WhatsApp Messenger + Voice Integrated Bundle Promotion was filed with the Authority on 12 June 2023 wherein it offers customers an integrated bundle comprising of 100 minutes + 1GB WhatsApp Data with a 1-day validity period for R 12.

The promotion rewards customers with more value for money, since when compared to Vodacom's Power Hour + WhatsApp bundle which offers customers 60 voice minutes and 1GB WhatsApp Bundle at R 11, the promotion offers 40 more minutes for an additional R 1.

Vodacom introduced the promotional offer on 01 July 2023 and it will be in the market until 01 January 2024.

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 January 2023 to 30 June 2023. The analysis of the tariff plans will consider month-to-month (MtM)[27] plans applicable offered during the period under review.

2.6.1. MTN Home Uncapped Price Plan

MTN filed its Home Uncapped Price Plan with the Authority on 24 January 2023 wherein it offers 4G and/or 5G FLTE packages offered on a MtM basis. Table 33 below shows the Home Uncapped packages.

Table 33: MTN Home Uncapped Price Plans

MTN Home Price Plans	Up to Speed	FUP	Throttle Speed	Device (Free-to-use)	Device Upgrade Deposit	Price
Starter	10Mbps	100GB	2Mbps	4G Router	5G Router (R 2 499)	R 249
Pro	20Mbps	300GB	5Mbps	4G Router	5G Router (R 2 199)	R 399
Premium	35Mbps	500GB	10Mbps	5G Router	N/A	R 499
Ultra	60Mbps	800GB	10Mbps	5G Router		R 699
Infinite	Best-effort	1.5TB	15Mbps	5G Router		R 999

Source: ICASA Database Based on Filed Tariff Notifications

As shown in the table above the packages are offered on varying Internet speeds with different fair usage policies (FUP). For example, the Home Uncapped Premium

[27] 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.

package offers customers up to 35Mbps Internet speed, 500GB FUP (throttled to 10Mbps afterwards) with a free-to-use 5G router for R 499 per month.

MTN initially planned to introduce its Home Uncapped Price Plans in the market on 07 February 2023. However, on 23 February 2023, the operator amended the launch date, of which the soft launch of the plan was made on 07 March 2023, and the broader launch was made on 01 April 2023.

2.6.2. Rain Unlimited Home 5G Premium Unlocked AU

Rain filed its Unlimited Home 5G Premium Unlocked AU with the Authority on 31 January 2023. The Rain Unlimited Home 5G Premium Unlocked AU entails a MtM 5G package which is priced at R 849. Table 34 below details the Rain Unlimited Home 5G Premium Unlocked AU.

Table 34: Rain Unlimited Home 5G Premium Unlocked AU

Price	R 849
Type	Month to month
Device	Includes free-to-use 5G CPE, locked to Rain network
Other	No rate Limit

Source: ICASA Database based on Tariff Notifications

Rain's Unlimited Home 5G Premium Unlocked AU was launched in the market on 10 February 2023.

2.6.3. Rain Unlimited Home 5G Standard Unlocked AU

Rain filed its Unlimited Home 5G Standard Unlocked AU with the Authority on 31 January 2023. The Rain Unlimited Home 5G Standard Unlocked AU entails a MtM 5G package which is priced at R 599 with a 60Mbps rate limit. Table 35 below details the Rain Unlimited Home 5G Standard Unlocked AU.

Table 35: Rain Unlimited Home 5G Standard Unlocked AU

Price	R 599
Type	Month to month
Device	Includes free-to-use 5G CPE, locked to Rain network
Other	60Mbps rate limit

Source: ICASA Database based on Tariff Notifications

Rain's Unlimited Home 5G Standard Unlocked AU was launched in the market on 10 February 2023.

2.6.4. Vox Telecom on MTN Uncapped 10Mbps

Vox Telecom filed its MTN Uncapped 10Mbps with the Authority on 13 February 2023. The Vox Telecom on MTN Uncapped 10Mbps entails an LTE package with a 400GB FUP and is priced at R 429.

The Vox Telecom on MTN Uncapped 10Mbps was launched in the week of 13 – 17 February 2023.

2.6.5.MTN Mobile Broadband Month-to-month Price Plan

MTN filed its MTN Mobile Broadband (MBB) Month-to-month Price Plan with the Authority on 15 February 2023 and 24 March 2023 wherein the operator introduced MtM mobile data with associated Bolt-on-bundles, as shown on tables 36 and 37 below.

Table 36: MTN MBB Month-to-month Price Plan

MBB Price Plans	Value	Subscription (Incl. VAT)	In-bundle Rate (Rand per MB)
Mobile Internet Silver	6GB	R 99	R 0.02
Mobile Internet Gold	15GB	R 149	R 0.01
Mobile Internet Platinum	30GB	R 215	R 0.01
Mobile Internet Ruby	70GB	R 299	R 0.004
Mobile Internet Diamond	200GB	R 399	R 0.002

Source: ICASA Database based on Tariff Notifications

The bundles range from 6GB to 200GB, with corresponding in-bundle rates ranging from R 0.002 to R 0.02. Upon depletion of the inclusive value, customers can top-up with the Bolt on Bundles shown on table 37 below.

Table 37: MTN MBB Bolt on Bundles

MTN MBB Bolt on bundles	Validity	Inclusive Value Data	Price (Incl. VAT)	In-bundle Rate (Rand per MB)

Mobile Internet Anytime 2GB	Recurring/1month/ carry over	2GB	R 49	R 0.02
Mobile Internet Anytime 6GB		6GB	R 99	R 0.02
Mobile Internet Anytime 10GB		10GB	R 89	R 0.01
Mobile Internet Anytime 20GB		20GB	R 129	R 0.01
Mobile Internet Anytime 30GB		30GB	R 129	R 0.004
Mobile Internet Anytime 60GB		60GB	R 199	R 0.003
Mobile Internet Anytime 40GB		40GB	R 149	R 0.004
Mobile Internet Anytime 80GB		80GB	R 199	R 0.002

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the Bolt-on Bundles comprise of Social bundles, Streaming bundles and Play bundles. It should be noted that the price plan is also available on 3, 6, 12, 18, 24 and 36-month contracts.

MTN introduced its MTN MBB Month-to-month price plan in the market on 01 April 2023.

2.6.6. Vodacom Home Internet LTE

Vodacom filed an amendment to its Home Internet LTE uncapped service with the Authority on 16 February 2023 wherein it changed the data usage terms and conditions and renamed its plan from "Home Internet LTE Uncapped" to "Home Internet LTE". It is worth noting that the preceding notification was filed with the Authority on 19 October 2022.

Vodacom's amendment was the introduction of the hard lock on its Home Internet LTE price plan, where the operator stops Internet access for a customer when a fair usage limit has been reached. All new and existing Home Internet LTE customers are now subject to a hard lock. That is, once the Soft Lock (throttling) and Hard Lock FUPs have been reached, as per your respective package, data usage will no longer continue. In order to have continued Internet access, customers would need to top-up with a 100GB or 200GB data bundle.

Vodacom's amendment to its Home Internet LTE Uncapped plan came to effect on 15 March 2023.

2.6.7. MTN Fixed LTE 120GB @ R249

On 17 February 2023, MTN filed a notification with the Authority to make its Fixed LTE 120GB @ R249 promotion permanent in the market. The operator ran a promotional offer on its Fixed-LTE 120GB (60GB Anytime + 60GB Night) package from 01 September 2022 to 28 February 2023, where the subscription fee of the package was reduced by R 50 from R 299 to R 249 per month, effective 01 March 2023.

2.6.8. MTN Vumatel Tactical Product

On 02 March 2023, MTN introduced a fibre package namely, the Tactical product which is available in certain geographical areas as determined by Vumatel in its sole discretion. Vumatel will notify the ISP's in which geographical areas this product is available on a quarterly basis. MTN Supersonic only offers the product to new customers who qualify. The offer entails a symmetrical 25Mbps line speed which is priced at R 449.

Customers benefit from the Tactical product which offers them more affordable fibre prices. For example, MTN's Supersonic on Zoom Fibre 25/25Mbps package is priced at R 629 while the Vumatel Tactical product is priced at R 449 which is R 180 or 28.6% less than the Supersonic on Zoom Fibre product.

MTN made the abovementioned fibre package available in the market from the 13 March 2023.

2.6.9. Telkom LTE Prepaid

Telkom filed an amendment of its LTE Prepaid with the Authority on 17 March 2023. The amendment of the LTE Prepaid entailed price increases ranging from 4% to 5.6%. Table 38 below details the amendment of the Telkom LTE Prepaid.

Table 38: Telkom LTE Prepaid

Product Description	Previous Price	Current Price	Difference	Variance (%)
20GB + 20GB	R 249	R 259	R 10	4%

40GB + 40GB	R 359	R 379	R 20	5.6%
60GB + 60GB	R 459	R 479	R 20	4.4%
80GB + 80GB	R 559	R 589	R 30	5.4%
120GB + 120GB	R 759	R 799	R 40	5.3%
220GB + 220GB	R 1 059	R 1 109	R 50	4.7%

Source: ICASA Database based on Tariff Notifications

The largest increase in absolute terms of R 50 occurred on the Telkom 220GB + 220GB LTE Prepaid package which increased from R 1 059 to R 1 109.

The amendment of the Telkom LTE Prepaid became effective on 01 April 2023.

2.6.10. Rain One

Rain filed its One product with the Authority on 25 April 2023. The Rain One entails 5G Home Wi-Fi with a free to use router and two 4G mobile phone sim cards, and the option to purchase additional data, voice and SMS bundles. Table 39 below details the Rain One product.

Table 39: Rain One

Base Product	
Price	R 559
5G Home Wi-Fi Speed	30Mbps
5G Home Wi-Fi Data allocation	unlimited
Number of 4G mobile phone lines	2
4G mobile phone Gigs per Line per month	2
4G mobile phone Minutes per Line per month	60
4G mobile phone SMSs per Line per month	100
Buying additional Gigs, Minutes and SMSs	
Product Description	**Price**
Data @ R50 for 1GB	R 50
Minutes @ R30 for 30 Minutes	R 30
SMSs @ R30 for 100 SMSs	R 30

Source: ICASA Database based on Tariff Notifications

The Rain One product was launched in the market on 04 May 2023.

2.6.11. MTN Super Data (Bozza Gigs 2.0) Price Plan

MTN filed an amendment on the Super Data Price Plan that was initially filed with the Authority on 28 April 2023 bearing the name "Bozza Gigs 2.0 Price Plan". The operator has since changed the name of the plan to "MTN Super Data Price Plan".

On 09 June 2023, MTN filed an amendment and further revised the launch date and amended the data packages offered in the plan. Table 40 below shows the new mobile data bundles.

Table 40: MTN Super Data Bundles

Mobile Super Data Bundles (Valid for 30 Days)				
Volume	**Speed**	**Device**	**Price**	**In-bundle Rate (Rand per MB)**
30GB Anytime	standard	Any	R 199	R 0.01
70GB Anytime	standard	Any	R 299	R 0.01
200GB Anytime	standard	Any	R 349	R 0.002

Source: ICASA Database based on Tariff Notifications

As shown in the table above, these are offered as mobile broadband bundles valid for 30 days, with in-bundle rates ranging between R 0.002 to R 0.01 per MB. Customers who opt for OOB rates will be charged:

- Voice All-net: R 1.99 per minute;
- Data: R 0.25 per MB;
- OOB SMS: R 0.50; and
- MMS: R 0.70.

MTN's amendments came into effect on 21 June 2023.

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

This section analyses Fibre-to-the Home (FTTH) tariff plans offered in the market and the prices charged by the operators, as per notifications filed from 01 January 2023 to 30 June 2023. The analysis of the tariff plans will consider the current MtM Self-Built FTTH plans, MtM fibre plans offered through 3rd party fibre network operators (FNOs) and promotional offers applicable to MtM contracts offered during the period under review. 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. Vox Telecom FTTH

Vox Telecom filed amendments of its FTTH plan with the Authority on 25 January, 27 March, 20 April, 23 May and 13 June 2023. The amendments entailed the introduction of new packages, price amendments and line speed upgrades. Table 41 below shows a sample[28] of the amendments of the Vox Telecom FTTH plan.

Table 41: Vox Telecom FTTH

Line Speed Upgrade			
Previous Line Speed	**Current Line Speed**	**Previous Price (Incl. VAT)**	**Current Price (Incl. VAT)**
30/3Mbps	40/10Mbps	R 599	R 599
30/30Mbps	40/40Mbps	R 654	R 695
N/A	1000/1000Mbps	N/A	R 1 479
25/10Mbps	40/20Mbps	R 549	R 599
25/25Mbps	40/40Mbps	R 599	R 649
50/25Mbps	75/50Mbps	R 699	R 749
N/A	400/200Mbps	N/A	R 1 295
10/10Mbps	15/15Mbps	R 654	R 718
20/20Mbps	30/30Mbps	R 849	R 920
200/200Mbps	300/50Mbps	R 1 395	R 1 480
New Products			
Product Description			**Price (Incl. VAT)**
250/250Mbps			R 945
400/400Mbps			R 1 055
Subscription Fee Amendments			
Product Description	**Previous Price**	**Current Price**	**Difference**	**Variance (%)**
50/50Mbps	R 699	R 665	-R 34	-4.9%
100/100Mbps	R 899	R 859	-R 40	-4.4%
1000/500Mbps	R 2 489	R 2 199	-R 290	-11.7%

Source: ICASA Database based on Tariff Notifications

As tabulated above, the largest price reduction in absolute and percentage terms of R 290 or 11.7% occurred on the Vox Telecom 1000/500Mbps FTTH which reduced from R 2 489 to R 2 199. The 100/100Mbps on Vox Telecom is comparable to the Telkom 100/100Mbps which is priced at R 886.08 or 3.2% more.

The final amendment of the Vox Telecom FTTH plan became effective on 22 June 2023.

[28] More information regarding Vox Telecom's FTTH plan can be found the Authority's database and may be made available upon request. In the case where the operator requested confidentiality, the Authority will liaise with such operator before sharing the requested information.

2.7.1.2. Zoom Fibre FTTH

Zoom Fibre filed an amendment of its FTTH plan with the Authority on 31 January 2023. The amendment of the Zoom Fibre FTTH plan entailed price adjustments across certain packages. For example, the 10/10Mbps on the Zoom Fibre FTTH realised a 20.1% price increase from R 249 to R 299. Table 42 below details the Zoom Fibre FTTH plan.

Table 42: Zoom Fibre FTTH

Product Description	Previous Price (Excl. VAT)	Current Price (Excl. VAT)	Difference	Variance (%)
10/10Mbps	R 249	R 299	R 50	20.1%
25/25Mbps	R 399	R 429	R 30	7.5%
50/50Mbps	R 505	R 535	R 30	5.9%
100/100Mbps	R 599	R 635	R 36	6%
200/200Mbps	R 699	R 735	R 36	5.2%
500/250Mbps	R 780	R 815	R 35	4.5%
1000/500Mbps	R 1 150	R 1 150	R 0	0%

Source: ICASA Database based on Tariff Notifications

The table above shows that the largest increase in absolute and percentage terms of R 50 or 20.1% occurred on the Zoom Fibre 10/10Mbps FTTH which increased from R 249 to R 299. While the price of the 10/10Mbps on Zoom Fibre line speed increased it is still relatively affordable when compared to the MTN Supersonic 10/10Mbps[29] (filed on 29 August 2022) which is priced at R 499 or 66.9% more.

The amendment of the Zoom Fibre FTTH plan became effective on 01 March 2023.

2.7.1.3. MetroFibre Direct Customers and ISP Products

MetroFibre filed an amendment of its Direct Customers and ISP Products with the Authority on 06 February 2023. The amendment of the Direct Customers and ISP Products entailed a 36.4% price reduction from R 1 695.65 to R 1 078.26, and a line speed upgrade at no additional cost, respectively. Table 43 below details the MetroFibre Direct Customers and ISP Products.

[29] Page 52, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 11 July 2023

Table 43: MetroFibre Direct Customers and ISP Products

Previous Line Speed	Current Line Speed	Previous Price (Excl. VAT)	Current Price (Excl. VAT)	Difference	Variance (%)
1Gbps/250Mbps	1Gbps/500Mbps	R 1 695.65	R 1 078.26	-R 617.39	-36.4%
ISP Customers					
200/200Mbps	400/400Mbps	R 650	R 650	R 0	0%

Source: ICASA Database based on Tariff Notifications

The amendment of the MetroFibre Direct Customers and ISP Products became effective on 01 February 2023.

2.7.1.4. Telkom FTTH

Telkom filed an amendment of its FTTH plan with the Authority on 14 February 2023. The amendment entailed the introduction and upgrade of certain packages on the Telkom FTTH plan. Table 44 below details the amendment of the Telkom FTTH plan.

Table 44: Telkom FTTH

Consumer		
Previous Package	**Current Package**	**Price (Incl. VAT)**
200/100Mbps	250/125Mbps	R 1 109
N/A	100/100Mbps	R 886.08

Source: ICASA Database based on Tariff Notifications

The Telkom 100/100Mbps Consumer FTTH package is comparable to the MTN Supersonic 100/100Mbps[30] (filed 29 August 2022) package which is priced at R 899 or 1.5% more.

The amendment of the Telkom FTTH plan became effective on 23 February 2023.

2.7.1.5. MetroFibre Direct FTTH

MetroFibre filed an amendment of its Direct FTTH packages with the Authority on 23 February 2023. Table 45 below details the amendment of the MetroFibre Direct

[30] Page 52, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 11 July 2023

FTTH packages which entailed line speed upgrades and price adjustments on certain packages.

Table 45: MetroFibre Direct & Reseller Packages

Direct Customers		
Previous Package	**Current Package**	**Price (Incl. VAT)**
50Mbps	250Mbps	R 760
100Mbps	500Mbps	R 1 070
All Customers		
Previous Package		**Current Package**
1Gbps/250Mbps		1Gbps/500Mbps

Source: ICASA Database based on Tariff Notifications

The amendment of the MetroFibre Direct FTTH packages became effective on 01 March 2023.

2.7.1.6. MetroFibre Direct Customers FTTH

MetroFibre filed an amendment of its Direct Customers FTTH plan with the Authority on 15 March 2023. The amendment of the MetroFibre Direct Customers FTTH plan entailed price adjustments, the termination and introduction of line speed packages. Table 46 below details the MetroFibre Direct Customers FTTH plan.

Table 46: MetroFibre Direct Customers FTTH

Product Description	Previous Price	Current Price	Difference	Variance (%)
20/20Mbps	R 400	R 399	-R 1	-0.2%
500/500Mbps	R 1 650	R 1 099	-R 551	-33.4%
1Gbps/500Mbps	R 1 950	R 1 249	-R 701	-35.9%
Terminated Packages				
50/50Mbps			R 760	
100/100Mbps			R 1 070	
200/200Mbps			R 1 240	

Source: ICASA Database based on Tariff Notifications

The amendment of the MetroFibre Direct Customers FTTH plan became effective on 23 March 2023.

2.7.1.7. Telkom Consumer FTTH

Telkom filed an amendment of its Consumer FTTH plan with the Authority on 20 April 2023. The amendment of the Telkom Consumer FTTH plan entailed price increases ranging from 8.6% to 12.3% on certain line speed packages. Table 47 below details the amendment of the Telkom Consumer FTTH plan[31].

Table 47: Telkom Consumer FTTH

Telkom Consumer FTTH				
Product Description	**Previous Price (Incl. VAT)**	**Current Price (Incl. VAT)**	**Difference**	**Variance (%)**
25/10Mbps	R 517.50	R 569	R 51.50	10%
25/25Mbps	R 649	R 705	R 56	8.6%
50/25Mbps	R 661.25	R 735	R 73.75	11.2%
50/50Mbps	R 729	R 819	R 90	12.3%
100/50Mbps	R 839	R 939	R 100	11.9%
100/100Mbps	R 886.08	R 990	R 103.92	11.7%
250/125Mbps	R 1 109	R 1 235	R 126	11.4%
500/250Mbps	R 1 329	R 1 479	R 150	11.3%

Source: ICASA Database based on Tariff Notifications

The table above shows that the largest tariff increase in percentage terms of 12.3% occurred on Telkom Consumer's 50/50Mbps FTTH which increased from R 729 to R 819. The Telkom Consumer FTTH 50/50Mbps is comparable to the Lasernet Fibre 50/50Mbps[32] package which is priced at R 790 or 3.5% less.

The amendment of the Telkom Consumer FTTH plan became effective on 01 May 2023.

2.7.1.8. Telkom Consumer Lite & Pure Uncapped: Core/Endless Fibre

Telkom filed an amendment of its Consumer Lite & Pure Uncapped: Core/Endless Fibre plan with the Authority on 20 April 2023. The amendment of Telkom's Consumer Lite & Pure Uncapped: Core/Endless Fibre plan entailed price increases

[31] Telkom's Consumer FTTH plan is relevant to FTTH access products only and does not include any Internet.
[32] Page 53, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 02 May 2023

ranging from 8.6% to 12.2% on certain packages. Table 48 below details the amendment of Telkom's Consumer Lite & Pure Uncapped: Core/Endless Fibre plan.

Table 48: Telkom Consumer Lite & Pure Uncapped: Core/Endless Fibre

Product Description	Previous Price (Incl. VAT)	Current Price (Incl. VAT)	Difference	Variance (%)
25/10Mbps Lite Uncapped	R 499	R 549	R 50	10%
50/25Mbps Lite Uncapped	R 649	R 719	R 70	10.8%
25/25Mbps Pure Uncapped	R 579	R 629	R 50	8.6%
50/50Mbps Pure Uncapped	R 735	R 825	R 90	12.2%
100/50Mbps Pure Uncapped	R 945	R 1 059	R 114	12.1%
100/100Mbps Pure Uncapped	R 995	R 1 115	R 120	12.1%
250/125Mbps Pure Uncapped	R 1 199	R 1 335	R 136	11.3%
500/250Mbps Pure Uncapped	R 1 345	R 1 499	R 154	11.4%

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the largest tariff increase in absolute terms of R 154 occurred on the 500/250Mbps Pure Uncapped package on Telkom's Consumer Lite & Pure Uncapped: Core/Endless Fibre which increased from R 1 345 to R 1499. The Telkom Consumer Lite & Pure Uncapped: Core/Endless 50/50Mbps is comparable to the MTN Supersonic 50/50Mbps[33] package priced at R 799 or 3.2% less.

The amendment of the Telkom Consumer Lite & Pure Uncapped: Core/Endless Fibre plan became effective on 01 May 2023.

2.7.1.9. Herotel FTTH

Herotel filed an amendment of its FTTH plan with the Authority on 20 April 2023. The amendment of the Herotel FTTH plan entailed price increases ranging from 7.2% to 10%. Table 49 below details the amendment of the Herotel FTTH plan.

Table 49: Herotel FTTH

Product Description	Previous Price	Current Price	Difference	Variance (%)
50/50Mbps	R 499	R 549	R 50	10%
75/75Mbps	R 599	R 649	R 50	8.3%
100/100Mbps	R 699	R 749	R 50	7.2%

[33] Page 52, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 02 May 2023

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the largest tariff increase in percentage terms of 10% occurred on the Herotel 50/50Mbps FTTH which increased from R 499 to R 549. The Herotel FTTH 50/50Mbps is comparable to the MTN Supersonic 50/50Mbps[34] package which is priced at R 799 or 45.5% more. The amendment of the Herotel FTTH plan came into effect on 01 June 2023.

2.7.1.10. Infinity Wireless FTTH

Infinity Wireless filed an amendment of its FTTH plan with the Authority on 21 April 2023. The amendment of the Infinity Wireless FTTH plan entailed the introduction, termination and price adjustment of certain packages. Table 50 below details the amendment of the Infinity Wireless FTTH plan.

Table 50: Infinity Wireless FTTH

Uncapped Fibre Package with FUP - Own Network				
Product Description			**Price**	
200/200Mbps			R 1 099	
500/250Mbps			R 1 299	
Uncapped Fibre Package No FUP - Own Network				
Product Description	**Previous Price**	**Current Price**	**Difference**	**Variance (%)**
200/200Mbps	R 1 599	R 1 299	-R 300	-18.8%
500/250Mbps	N/A	R 1 499	N/A	N/A
Home Wireless Package - Own Network				
New Packages				
Product Description			**Price**	
5/5Mbps			R 450	
10/10Mbps			R 725	
20/20Mbps			R 999	
30/20Mbps			R 1 169	
Terminated Packages				
5/3Mbps			R 450	
10/5Mbps			R 725	
20/10Mbps			R 999	
30/15Mbps			R 1 169	

Source: ICASA Database based on Tariff Notifications

The Infinity Wireless FTTH 200/200Mbps is comparable to the Zoom Fibre 200/200Mbps package which is priced at R 735 or 43.4% less. The amendment of the Infinity Wireless FTTH plan became effective on 01 May 2023.

[34] Page 52, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 02 May 2023

2.7.1.11. ASAP Internet FTTH

ASAP Internet filed its FTTH plan with the Authority on 24 April 2023, which entailed a single FTTH package of the 250/250Mbps line speed which is priced at R 900.

The ASAP Internet FTTH 250/250Mbps is comparable to the Vox Telecom 250/250Mbps package which is priced at R 945 or 5% more. The ASAP Internet FTTH plan was launched in the market on 01 May 2023.

2.7.1.12. MetroFibre Retirement Villages FTTH

MetroFibre filed an amendment of its Retirement Villages FTTH plan with the Authority on 26 June 2023. The amendment of the MetroFibre Retirement Villages FTTH plan entailed price adjustments and line speed upgrades on certain packages. Table 51 below details the amendment of the MetroFibre Retirement Villages FTTH plan.

Table 51: MetroFibre Retirement Villages FTTH

Retirement Villages Existing Customers					
Previous Package	**Current Package**	**Previous Price**	**Current Price**	**Difference**	**Variance (%)**
200Mbps	250Mbps	R 800	N/A	N/A	N/A
250Mbps		N/A	R 660	N/A	N/A
500Mbps	N/A	R 1 000	R 955	-R 45	-4.5%
1Gbps	N/A	R 1 200	R 1 086	-R 114	-9.5%
Bulk Deals - Existing Customers					
100Mbps	250Mbps	R 740	R 660	-R 80	-10.8%
200Mbps		R 940	R 660	-R 280	-29.8%
500Mbps	N/A	R 1 140	R 940	-R 200	-17.5%
1Gbps	N/A	R 1 340	R 1 086	-R 254	-19%
Bulk Deals - New Customers					
100Mbps	N/A	R 740	R 660	-R 80	-10.8%
200Mbps	N/A	R 940	R 660	-R 280	-29.8%
500Mbps	N/A	R 1 140	R 940	-R 200	-17.5%
1Gbps	N/A	R 1 340	R 1 086	-R 254	-19%

Source: ICASA Database based on Tariff Notifications

The table above shows that the largest price reduction in absolute and percentage terms of R 280 or 29.8% occurred on the upgraded Bulk deals 250Mbps FTTH and the 200Mbps FTTH on the MetroFibre network.

The amendment of the MetroFibre Retirement Villages FTTH plan became effective on 01 July 2023.

2.7.1.13. ASAP Internet Wireless Internet FTTH

ASAP Internet filed an amendment of its Wireless Internet FTTH plan with the Authority on 27 June 2023. The amendment of the ASAP Internet Wireless Internet FTTH plan entails price adjustments across all packages.

Table 52 below details the amendment of the ASAP Internet Wireless Internet FTTH plan.

Table 52: ASAP Internet Wireless Internet

Product Description	Previous Price	Current Price	Difference	Variance (%)
4/2Mbps	R 425	R 430	R 5	1.2%
10/5Mbps	R 675	R 690	R 15	2.2%
20/10Mbps	R 1 100	R 1 125	R 25	2.3%
40/20Mbps	R 1 455	R 1 515	R 60	4.1%
4/4Mbps	R 625	R 640	R 15	2.4%
10/10Mbps	R 975	R 1 010	R 35	3.6%
20/20Mbps	R 1 650	R 1 695	R 45	2.7%
40/40Mbps	R 2 350	R 2 435	R 85	3.6%

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the largest price increase in percentage terms of 4.1% occurred on the ASAP Internet Wireless Internet 40/20Mbps FTTH. The ASAP Internet Wireless 40/20Mbps is comparable to the Vox Telecom 40/20Mbps package which is priced at R 599 or 60.5% less. The amendment of the ASAP Internet Wireless Internet FTTH plan became effective on 01 August 2023.

2.7.1.14. Amobia Wireless to multi-dwelling units

Amobia filed its Wireless to multi-dwelling units plan with the Authority on 28 June 2023. The Amobia Wireless to multi-dwelling units plan entails three line speed packages priced from R 199 to R 399. Table 53 below details the Amobia Wireless to multi-dwelling units plan.

Table 53: Amobia Wireless to multi-dwelling units

Product Description	Price
10/10Mbps	R 199

15/15Mbps	R 299
20/10Mbps	R 399

Source: ICASA Database based on Tariff Notifications

The Amobia Wireless to multi-dwelling units 10/10Mbps is comparable to the Zoom Fibre's 10/10Mbps package which is priced at R 299 or 50.3% more. The Amobia Wireless to multi-dwelling units plan was launched on 10 July 2023.

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

2.7.2.1. ASAP Internet on Frogfoot FTTH

ASAP Internet filed an amendment of its Frogfoot FTTH plan with the Authority on 09 January 2023. The amendment entailed the introduction of new packages, price amendments, terminations and the upgrade of line speeds of certain packages. Table 54 below details the amendment.

Table 54: ASAP Internet on Frogfoot FTTH

Previous Package	Current Package	Previous Price	Current Price
30/3Mbps	40/10Mbps	R 645	R 640
30/30Mbps	40/40Mbps	R 675	R 720
50/5Mbps	80/20Mbps	R 715	R 740
50/50Mbps	80/80Mbps	R 800	R 840
100/10Mbps	150/30Mbps	R 845	R 900
100/100Mbps	150/150Mbps	R 900	R 965
200/20Mbps	250/50Mbps	R 975	R 1 020
200/200Mbps	250/250Mbps	R 1 000	R 1 070
500/50Mbps	500/100Mbps	R 1 300	R 1 180
500/500Mbps	500/500Mbps	R 1 350	R 1 250
N/A	1000/1000Mbps	R 1 550	R 1 450

Source: ICASA Database based on Tariff Notifications

As shown in the table above, a notable line speed upgrade and a price reduction of 9.2% occurred on the ASAP Internet on Frogfoot 500/100Mbps FTTH which reduced from R 1 300 to R 1 180. The 500/500Mbps on ASAP Internet Frogfoot is comparable to Lasernet on Frogfoot's 500/500Mbps[35] (filed on 31 August 2022) which is priced at R 1 599 or 27.9% more.

[35] Page 68, available on ICASA's website: Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 03 July 2023

The amendment of the ASAP Internet on Frogfoot FTTH plan became effective on 01 February 2023.

2.7.2.2. Cell C Home Connecta Fibre Retention Tier 1,2,3,4, and 5 Discounts

Cell C filed its Home Connecta Fibre Retention Tier 1,2,3,4 and 5 Discounts plan with the Authority on 09 January 2023. The Cell C Home Connecta Fibre Retention Tier 1,2,3,4 and 5 Discounts plan entails FTTH packages with discounts ranging from 50% to 100% on the Vumatel, Openserve, Frogfoot, Metrofibre, Octotel, Fibre Suburbs Network, Purple Forest, Waterfall Access Networks, Netstream, Mitsol, Link Layer and Zoom Fibre networks with line speeds ranging from 10/10Mbps to 1000/500Mbps.

Table 55 below details the Cell C Home Connecta Fibre Retention Tier 1,2,3,4 and 5 Discounts[36] plan.

Table 55: Cell C Home Connecta Fibre Retention Tier 1,2,3,4 and 5 Discounts

Discount	
T1	50% on next month's bill
T2	50% discount to your next 2 months' bills
T3	100% discount to your next months' bills
T4	80% discount to your next 2 months' bills
T5	100% discount to your next 2 months' bills
Product Description	**Price (Incl. VAT)**
Vumatel	
50Mbps/50Mbps	R 699
100Mbps/100Mbps	R 885
200Mbps/200Mbps	R 999
Openserve	
25Mbps/10Mbps	R 549
25Mbps/25Mbps	R 579
50Mbps/25Mbps	R 679
Frogfoot	
30Mbps/30Mbps	R 675
50Mbps/50Mbps	R 799
100Mbps/100Mbps	R 889
MetroFibre	
20Mbps/20Mbps	R 459

[36] More information regarding Cell C's Fibre Retentions Tier 1,2,3,4, and 5 Discounts can be found the Authority's database and may be made available upon request. In the case where the operator requested confidentiality, the Authority will liaise with such operator before sharing the requested information.

50Mbps/50Mbps	R 649
100Mbps/100Mbps	R 799
Octotel	
30Mbps/25Mbps	R 649
50Mbps/50Mbps	R 749
100Mbps/100Mbps	R 969
FibreSuburb	
10Mbps/10Mbps	R 529
25Mbps/25Mbps	R 679
50Mbps/50Mbps	R 779
Purple Forest	
10Mbps/10Mbps	R 599
25Mbps/25Mbps	R 749
50Mbps/50Mbps	R 899
Waterfall Access Networks	
10Mbps/10Mbps	R 599
20Mbps/20Mbps	R 799
50Mbps/50Mbps	R 949
Netstream	
10Mbps/10Mbps	R 749
20Mbps/20Mbps	R 849
40Mbps/40Mbps	R 899
Mitsol	
10Mbps/10Mbps	R 659
20Mbps/20Mbps	R 749
50Mbps/50Mbps	R 849
Link Layer	
25Mbps/25Mbps	R 799
50Mbps/50Mbps	R 929
100Mbps/100Mbps	R 1 049
Zoom Fibre	
10Mbps/10Mbps	R 369
25Mbps/25Mbps	R 599
50Mbps/50Mbps	R 749

Source: ICASA Database based on Tariff Notifications

Cell C's 200/200Mbps on the Vumatel network is comparable to the 200/200Mbps on Cybersmart on Vumatel FTTH[37] (filed on 22 August 2022) which is priced at R 989 or 1% less.

The Cell C Home Connecta Fibre Retention Tier 1,2,3,4 and 5 Discounts plan was launched on 19 January 2023.

[37] Page 64, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 11 July 2023

2.7.2.3. MTN Supersonic on Frogfoot

MTN filed an amendment of its Supersonic on Frogfoot FTTH plan with the Authority on 13 January 2023 which entailed an increase in the line speeds and price adjustments for the affected line speeds, as detailed in table 56 below.

Table 56: MTN Supersonic on Frogfoot

Previous Line Speed (Mbps)	Previous Retail Price	Current Line Speed (Mbps)	Current Retail Price	Price Difference	Variance (%)
30/30	R 695	40/40	R 795	R 100	14.4%
50/50	R 845	80/80	R 845	R 0	0%
100/100	R 995	150/150	R 995	R 0	0%
200/200	R 1 195	250/250	R 1 095	-R 100	-8.4%
500/500	R 1 649	500/500	R 1 295	-R 354	-21.5%
1000/100	R 1 999	1000/200	R 1 495	-R 504	-25.2%

Source: ICASA Database based on Filed Tariff Notifications

As shown in the table above, the 30/30Mbps package realised a line speed upgrade from 30/30Mbps to 40/40Mbps which resulted in a R 100 (or 14.4%) increase in the subscription fee from R 695 to R 795. The 50/50Mbps and 100/100Mbps packages realised line speed upgrades to 80/80Mbps and 150/150Mbps while the subscription fees remained unchanged at R 845 and R 995, respectively.

The largest subscription fee reduction occurred on the 1000/100Mbps package wherein it was reduced by R 504 (or 25.2%) from R 1 999 to R 1 495, while the upload speed was increased from 1000/100Mbps to 1000/200Mbps.

MTN's amendment of its Supersonic on Frogfoot FTTH plan came to effect on 01 February 2023.

2.7.2.4. Cell C Home Connecta Fibre Plans

Cell C filed an amendment of its Home Connecta Fibre Plans with the Authority on 17 January 2023. The amendment of Cell C's Home Connecta Fibre Plans entailed the upgrade of line speeds, termination of packages, and price adjustments of certain packages. Table 57 below details the Cell C Home Connecta Fibre Plans.

Table 57: Cell C Home Connecta Fibre Plans

Previous Line Speed	Current Line Speed	Previous Price (Incl. VAT)	Current Price (Incl. VAT)
10/5Mbps	40/10Mbps	N/A	R 619
30/3Mbps	40/10Mbps	N/A	R 619
30/30Mbps	40/40Mbps	R 675	R 675
50/5Mbps	80/20Mbps	N/A	R 749
50/50Mbps	80/80Mbps	R 799	R 799
100/10Mbps	150/30Mbps	N/A	R 849
100/100Mbps	150/150Mbps	R 889	R 889
200/20Mbps	250/50Mbps	N/A	R 949
200/200Mbps	250/250Mbps	R 999	R 999
500/50Mbps	500/100Mbps	N/A	R 1 049
500/500Mbps	500/500Mbps	R 1 199	R 1 199
1000/100Mbps	1000/200Mbps	R 1 299	R 1 299
1000/1000Mbps	1000/1000Mbps	R 1 399	R 1 399
50/50Mbps	50/50Mbps	R 689	R 739
200/200Mbps	400/400Mbps	R 989	R 989
1Gbps/250Mbps	1Gbps/250Mbps	R 1 939	R 1 399
10/10Mbps	10/10Mbps	R 349	R 409
25/25Mbps	25/25Mbps	R 539	R 569
50/50Mbps	50/50Mbps	R 689	R 729
100/100Mbps	100/100Mbps	R 839	R 889
200/200Mbps	200/200Mbps	R 999	R 1 019
500/250Mbps	500/250Mbps	R 1 049	R 1 119
1000/500Mbps	1000/500Mbps	R 1 599	R 1 599

Source: ICASA Database based on Tariff Notifications

As shown in the table above, Frogfoot upgraded its 200/200Mbps FTTH to 250/250Mbps while subscription fee remained unchanged. The 500/500Mbps on Cell C's Home Connecta on Frogfoot is comparable to Lasernet on Frogfoot's 500/500Mbps[38] (filed on 31 August 2022) which is priced at R 1 599 or 33.4% more.

The amendments on Cell C's Home Connecta Fibre Plans became effective on 01 February and 01 March 2023.

2.7.2.5. Cell C Home Connecta Fibre Netstream (Selected Estates)

Cell C filed its Home Connecta Fibre Netstream Selected Estates plan with the Authority on 18 January 2023. The Cell C Home Connecta Fibre Netstream Selected Estates plan entailed five line speed packages ranging from 10/10Mbps

[38] Page 68, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 11 July 2023.

to 200/200Mbps and priced from R 695 and R 1 249 respectively. Table 58 below details the Cell C Home Connecta Fibre Netstream Selected Estates plan.

Table 58: Cell C Home Connecta Fibre Netstream Selected Estates

Product Description	Price (Incl. VAT)
10/10Mbps	R 695
20/20Mbps	R 749
50/50Mbps	R 849
100/100Mbps	R 1 049
200/200Mbps	R 1 249

Source: ICASA Database based on Tariff Notifications

The Cell C Home Connecta Fibre Netstream Selected Estates plan was launched on 01 February 2023.

2.7.2.6. Vodacom Fibre Broadband on Frogfoot

Vodacom filed an amendment to its Fibre Broadband on Frogfoot's network with the Authority on 20 January 2023 wherein it replaced legacy fibre packages with new ones. The new packages are a combination of symmetrical and asymmetrical fibre, with download speeds ranging from 40Mbps to 1000Mbps and upload speeds ranging from 10Mbps to 1Gbps. Table 59 below shows the amendment of fibre packages on Frogfoot's network.

Table 59: Vodacom Fibre Broadband on Frogfoot

Previous Line Speed (Mbps)	Previous Monthly Subscription	Current Line Speed (Mbps)	Current Monthly Subscription
30/10	R 599	40/10	R 699
30/30	R 699	40/40	R 799
50/5	R 799	80/20	R 899
50/50	R 849	80/80	R 999
100/10	R 899	150/30	R 1 049
100/100	R 949	150/150	R 1 149
200/20	R 999	250/50	R 1 199
200/200	R 1 099	250/250	R 1 299
N/A	N/A	500/100	R 1 399
N/A	N/A	500/500	R 1 499
N/A	N/A	1000/200	R 1 599
N/A	N/A	1000/1000	R 1 599

Source: ICASA Database based on Filed Tariff Notifications

As shown in the table above, the packages realised a line speed and corresponding price increases. For example, the 100/100Mbps line speed was increased to

150/150Mbps while the price was changed from R 949 to R 1 149 to reflect the line speed upgrade.

A comparison can be made with MTN Supersonic on Frogfoot where, for example, MTN offers its 80/80 Mbps packages for R 845, which is R 154 or 15.4% less than what Vodacom charges for the same line speed.

Vodacom's amendment to the Fibre Broadband on Frogfoot came to effect on 01 February 2023.

2.7.2.7. MWEB FTTx

MWEB filed amendments of its FTTx plan with the Authority on 27 January, 21 February and 25 April 2023. The amendments of the MWEB FTTx plan entailed price adjustments and line speed upgrades across various networks. For example, the 200Mbps on the Metrofibre Networx which was previously priced at R 979 was upgraded to 400Mbps while realising a 1.6% price increase to R 995. Table 60 below shows a sample[39] of the amendments of the MWEB FTTx plan.

Table 60: MWEB FTTx

Line speed Upgrades			
Frogfoot			
Previous Line Speed	**Current Line Speed**	**Previous Price**	**Current Price**
30/3Mbps	40/10Mbps	R 599	R 615
30/30Mbps	40/40Mbps	R 649	R 686
Metro Fibre			
200Mbps	400Mbps	R 979	R 995
Lightstruck			
20/20Mbps	50/25Mbps	R 699	R 745
50/50Mbps	100/50Mbps	R 929	R 949
Octotel			
35/25Mbps	50/50Mbps	R 645	R 749
1Gbps	1Gbps/200Mbps	R 1 399	R 1 449
Thinkspeed			
10Mbps	30/15Mbps	R 499	R 679
20Mbps	30/15Mbps	R 639	R 679
Clear Access			
25Mbps	50Mbps	R 699	R 739
50Mbps	100Mbps	R 839	R 889

[39] More information regarding MWEB's FTTx plan can be found the Authority's database and may be made available upon request. In the case where the operator requested confidentiality, the Authority will liaise with such operator before sharing the requested information.

Price reductions					
Product Description	**Previous Price**	**Current Price**	**Difference**	**Variance (%)**	
Vumatel					
Premium 200/200Mbps	R 999	R 1 045	R 46	4.6%	
500/200Mbps	R 1 149	R 1 189	R 40	3.5%	
MetroFibre Networx					
50Mbps	R 695	R 769	R 74	10.6%	
TT Connect					
150/150Mbps	R 999	R 1 159	R 160	16%	
300/300Mbps	R 1 299	R 1 429	R 130	10%	
ThinkSpeed - Clara Anna					
10Mbps	R 679	R 499	-R 180	-26.5%	
50Mbps	R 979	R 749	-R 230	-23.5%	
Terminated Packages					
Thinkspeed					
50Mbps	N/A	R 899	R 799	-R 100	-11.1%
100Mbps	N/A	R 1 049	R 999	-R 50	-4.8%
Zoom Fibre					
25Mbps	N/A	R 559	R 599	R 40	7.2%
50Mbps	N/A	R 699	R 789	R 90	12.9%
Metrofibre					
50Mbps	N/A	R 679	R 695	R 16	2.4%

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the largest price reduction in absolute terms of 23.5% occurred on the 50Mbps FTTH on the Thinkspeed Clara Anna network reducing from R 979 to R 749. The 40/40Mbps on MWEB on Frogfoot is comparable to Amobia on Frogfoot's 40/40Mbps[40] (filed on 15 December 2022) which is priced at R 709 or 3.4% more.

The amendments of the MWEB FTTx plan became effective on 01 February, 01 March (new customers), 01 April (existing customers) and 01 June 2023.

2.7.2.8. *MTN Supersonic on Zoom Fibre*

MTN's amendment to its Supersonic on Zoom Fibre plan was filed with the Authority on 30 January 2023. The amendment entailed a subscription fee increase in the Zoom fibre packages. Table 61 below shows the price adjustment on Zoom Fibre's packages.

[40] Page 68, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 11 July 2023

Table 61: MTN Supersonic on Zoom Fibre

Line Speed (Mbps)	Previous Price	Current Price	Price Difference	Variance (%)
10/10	R 369	R 429	R 60	16.3%
25/25	R 589	R 629	R 40	6.8%
50/50	R 699	R 769	R 70	10%
100/100	R 849	R 929	R 80	9.4%
200/200	R 999	R 1 099	R 100	10%
500/500	R 1 099	R 1 199	R 100	9.1%
1000/500	R 1 649	R 1 649	R 0	0%

Source: ICASA Database based on Filed Tariff Notifications

On average, the price increase on Zoom Fibre's packages was 10.3%. The table above shows that the largest subscription fee increase in absolute value terms occurred on the 200/200Mbps and 500/500Mbps packages, where they both increased by R 100 to R 1 099 and R 1 199, respectively. The largest subscription fee increase in absolute value terms occurred on the 10/10Mbps package wherein it was increased by 16.3% from R 369 to R 429.

MTN's amendment to the Zoom Fibre packages came to effect on 13 February 2023.

2.7.2.9. Amobia on Metro FTTH

Amobia filed an amendment of its Metro FTTH plan with the Authority on 31 January 2023. The amendment entailed the termination and introduction of packages on the Amobia on Metro FTTH plan. For example, Amobia introduced a 400/400Mbps FTTH which is priced at R 989 on the Metro network. Table 62 below details the amendment of the Amobia on Metro FTTH plan.

Table 62: Amobia on Metro FTTH

New Package	Price
400/400Mbps	R 989
Terminated Package	**Price**
200/200Mbps	R 969

Source: ICASA Database based on Tariff Notifications

The amendment of the Amobia on Metro FTTH plan became effective on 13 February 2023.

2.7.2.10. Amobia on Buh-Rein Retirement FTTH

Amobia filed an amendment of its Buh-Rein Retirement FTTH plan with the Authority on 31 January 2023. The amendment entailed the termination and introduction of packages on the Amobia on Buh-Rein Retirement FTTH plan. For example, Amobia introduced a 10/5Mbps FTTH which is priced at R 289 on the Buh-Rein network. Table 63 below details the Amobia on Buh-Rein Retirement FTTH plan.

Table 63: Amobia on Buh-Rein Retirement FTTH

New Package	Price
10/5Mbps	R 289
Terminated Package	**Price**
5/2Mbps	R 199

Source: ICASA Database based on Tariff Notifications

The amendment of the Amobia on Buh-Rein Retirement FTTH plan became effective on 13 February 2023.

2.7.2.11. MTN Supersonic on Metrofibre and Baldwin FTTH

MTN filed an amendment to its Supersonic on Balwin and MetroFibre networks with the Authority on 01 February 2023, wherein it adjusted the line speeds and subscription fees for selected fibre packages. Table 64 below shows the amendments.

Table 64: MTN Supersonic on Balwin and MetroFibre

Previous Line Speed (Mbps)	Previous Price (Incl. VAT)	Current Line Speed (Mbps)	Current Price (Incl. VAT)	Price Difference	Variance (%)
MTN Supersonic on Balwin Fibre					
4/1	R 449	4/1	R 469	R 20	4.5%
25/25	R 599	35/35	R 669	R 70	11.7%
50/50	R 759	50/50	R 799	R 40	5.3%
100/100	R 949	100/100	R 999	R 50	5.3%
200/200	R 1 099	200/200	R 1 199	R 100	9.1%
500/500	R 1 299	500/500	R 1 299	R 0	0.0%
1000/500	R 1 849	1000/500	R 1 799	-R 50	-2.7%
MTN Supersonic on MetroFibre					
1000/250	R 1 749	1000/250	R 1 299	-R 450	-25.7%

Source: ICASA Database based on Filed Tariff Notifications

As shown in the table above, the 25/25Mbps line speed was increased to 35/35Mbps while the subscription fee was also increased by R 70 or 11.7% from R 599 to R 649. The largest subscription fee increase in absolute value terms occurred on the 200/200Mbps package wherein it was increased by R 100 or 9.1% from R 1 099 to R 1 199. Metrofibre's 1000/250Mbps package was also reduced by R 450 or 25.7% from R 1 749 to R 1 299.

MTN's amendment to its Supersonic on Metrofibre and Balwin Pricing came to effect on 01 March 2023.

2.7.2.12. Amobia on Oasis FTTH

Amobia filed an amendment of its Oasis FTTH plan with the Authority on 06 February 2023. The amendment of the Amobia on Oasis FTTH plan entailed the termination of certain packages, the introduction of new packages and price adjustments on certain packages. For example, the Amobia on Oasis 200/100Mbps FTTH realised a 4.5% increase from R 1 100 to R 1 149. Table 65 below details the Amobia on Oasis FTTH plan.

Table 65: Amobia on Oasis FTTH

Price amendments				
Product Description	**Previous Price**	**Current Price**	**Difference**	**Variance (%)**
50/25Mbps	R 785	R 849	R 64	8.2%
100/50Mbps	R 950	R 999	R 49	5.2%
200/100Mbps	R 1 100	R 1 149	R 49	4.5%
New Packages				
Product Description			**Price**	
30/15Mbps			R 645	
500/250Mbps			R 1 295	
1000/500Mbps			R 1 499	
Terminated Packages				
5/2.5Mbps			R 405	
20/10Mbps			R 635	

Source: ICASA Database based on Tariff Notifications

The amendment of the Amobia on Oasis FTTH plan became effective on 01 March 2023.

2.7.2.13. Amobia on Century City FTTH

Amobia filed an amendment of its Century City FTTH plan with the Authority on 06 February 2023. The amendment of the Amobia on Century City FTTH plan entailed the termination, introduction, and price adjustments of certain packages. For example, the Amobia on Century City 100/50Mbps FTTH realised a 5.2% price increase. Table 66 below details the Amobia on Century City FTTH plan.

Table 66: Amobia on Century City FTTH

Price amendments				
Product Description	**Previous Price**	**Current Price**	**Difference**	**Variance (%)**
50/25Mbps	R 785	R 849	R 64	8.2%
100/50Mbps	R 950	R 999	R 49	5.2%
200/100Mbps	R 1 100	R 1 149	R 49	4.5%
New Packages				
Product Description			**Price**	
30/15Mbps			R 645	
500/250Mbps			R 1 295	
1000/500Mbps			R 1 499	
Terminated Packages				
10/5Mbps			R 495	
20/10Mbps			R 635	

Source: ICASA Database based on Tariff Notifications

The 100/50Mbps package on Amobia on Century City FTTH is comparable to Vodacom's 100/50Mbps on the Century City FTTH[41] (filed on 17 August 2022) which is priced at R 1 049 or 5% more.

The amendments of the Amobia on Century City FTTH plan came into effect on 01 March 2023.

2.7.2.14. ASAP Internet on Frogfoot FTTH

ASAP Internet filed its Frogfoot FTTH plan with the Authority on 10 February 2023. The ASAP Internet on Frogfoot FTTH plan entails two packages priced between R 290 and R 405, as shown in table 67 below.

[41] Page 63, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 11 July 2023

Table 67: ASAP Internet on Frogfoot FTTH

Product Description	Price
10/1Mbps	R 290
20/2Mbps	R 405

Source: ICASA Database based on Tariff Notifications

The ASAP Internet on Frogfoot 10/1Mbps package is comparable to the Telkom on Frogfoot 10/1Mbps[42] (filed 09 November 2022) package which is priced at R 329 or 13.4% more.

The ASAP Internet on Frogfoot FTTH plan was launched on 22 February 2023.

2.7.2.15. Cybersmart on Frogfoot Home Uncapped FTTH

Cybersmart filed an amendment of its Frogfoot Home Uncapped FTTH plan with the Authority on 14 February 2023. The amendment of the Cybersmart on Frogfoot Home Uncapped FTTH plan entailed the upgrade, termination, price amendments and the introduction of new packages. Table 68 below details the Cybersmart on Frogfoot Home Uncapped FTTH plan.

Table 68: Cybersmart on Frogfoot Home Uncapped FTTH

Previous Package	Current Package	Previous Price	Current Price
30/30Mbps	40/40Mbps	R 595	R 625
50/50Mbps	80/80Mbps	R 795	R 845
100/100Mbps	150/150Mbps	R 895	R 985
200/200Mbps	250/250Mbps	R 995	R 1 145
500/500Mbps		R 1 295	R 1 335
N/A	1000/1000Mbps	N/A	R 1 595

Source: ICASA Database based on Tariff Notifications

The table above shows that the lowest tariff increase of 5% occurred on the upgraded 40/40Mbps on Cybersmart's Frogfoot Home Uncapped. The Cybersmart on Frogfoot 500/500Mbps package is comparable to the Lasernet on Frogfoot

[42] Page 82, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 11 July 2023

500/500Mbps[43] (filed 31 August 2022) package which is priced at R 1 599 or 19.8% more.

The amendment of the Cybersmart on Frogfoot Home Uncapped FTTH plan became effective on 27 February 2023.

2.7.2.16. Cell C Home Connecta Fibre Tariff Plan

Cell C filed an amendment of its Home Connecta Fibre Tariff plan with the Authority on 17 February 2023. The amendment of the Cell C Home Connecta Fibre Tariff plan entailed the addition of new FTTH packages on various networks. Table 69 below details a sample[44] of the amendment of the Cell C Home Connecta Fibre Tariff plan.

Table 69: Cell C Home Connecta Fibre Tariff

Vumatel	
Product Description	**Price (Incl. VAT)**
50/50Mbps	R 699
100/100Mbps	R 885
Openserve	
40/20Mbps	R 599
40/40Mbps	R 629
Frogfoot	
40/10Mbps	R 619
40/40Mbps	R 675
MetroFibre	
100/100Mbps	R 869
Octotel	
10/5Mbps	R 359
25/25Mbps	R 519
Fibre Suburbs Network	
10/10Mbps	R 529
25/25Mbps	R 679
Purple Forest	
10/10Mbps	R 599
25/25Mbps	R 749
Waterfall Access Networks	
10/10Mbps	R 599
20/20Mbps	R 799

[43]Page 68, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 11 July 2023

[44]More information regarding Cell C's Home Connecta Fibre Tariff plan can be found the Authority's database and may be made available upon request. In the case where the operator requested confidentiality, the Authority will liaise with such operator before sharing the requested information.

Netstream	
10/10Mbps	R 749
20/20Mbps	R 849
Mitsol	
10/10Mbps	R 659
20/20Mbps	R 749
Link Layer	
25/25Mbps	R 799
50/50Mbps	R 929
Zoom Fibre	
10/10Mbps	R 409
25/25Mbps	R 569

Source: ICASA Database based on Tariff Notifications

The Cell C Home Connecta Fibre Tariff on Octotel 25/25Mbps package is comparable to the MWEB on Octotel 25/25Mbps[45] (filed 25 October 2022) package which is priced at R 499 or 3.9% less.

The amendment of the Cell C Home Connecta Fibre Tariff plan became effective on 01 March 2023.

2.7.2.17. Cape Connect Internet FTTH

Cape Connect Internet filed an amendment of its FTTH plan with the Authority on 23 February 2023. The amendment of the Cape Connect Internet FTTH plan entailed the introduction of new packages and price adjustments on certain networks. Table 70 below details the amendment of the Cape Connect Internet FTTH plan.

Table 70: Cape Connect Internet FTTH

Home Fibre – Internode	
Product Description	Price
2Mbps	R 99
5Mbps	R 199
Home Fibre – Openserve	
25Mbps	R 745
50Mbps	R 995
Home Fibre – Clearwire	
30Mbps	R 599
50Mbps	R 799

[45] Page 79, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 11 July 2023

Home Fibre – Octotel				
35/25Mbps			R 875	
50Mbps			R 995	
Home Fibre – Vuma				
10/2Mbps			R 770	
10Mbps			R 850	
Uncapped Wireless				
Lifeline 1Mbps			R 99	
Lifeline 2Mbps			R 199	
Heatzone Wireless				
20Mbps			R 395	
50Mbps			R 545	
Price Amendment				
Home Fibre – Frogfoot				
	Previous Price	Current Price	Difference	Variance (%)
40/10Mbps	R 399	R 595	R 196	49.1%
40Mbps	R 599	R 695	R 96	16%

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the largest price increase in absolute and percentage terms of R 196 or 49.1% occurred on the Cape Connect 40/10Mbps FTTH which increased from R 399 to R 595. The Cape Connect on Octotel 35/25Mbps package is comparable to the Lasernet on Octotel 50/50Mbps[46] (filed 31 August 2022) package which is priced at R 699 or 20.1% less. The Cape Connect FTTH plan was launched on 01 April 2023.

2.7.2.18. MWEB on Openserve FTTH

MWEB filed an amendment of its Openserve FTTH plan with the Authority on 27 February 2023. The amendment of the MWEB on Openserve FTTH plan entailed line speed upgrades on selected packages. Table 71 below details the MWEB on Openserve FTTH plan.

Table 71: MWEB on Openserve FTTH

Previous Line Speed	Current Line Speed	Previous Price	Current Price
25/10Mbps	40/20Mbps	R 499	R 559
25/25Mbps	40/40Mbps	R 599	R 659
50/25Mbps	75/50Mbps	R 689	R 759
50/50Mbps	75/75Mbps	R 749	R 829
100/50Mbps	150/75Mbps	R 899	R 899
100/100Mbps	150/150Mbps	R 959	R 1 029

[46] Page 70, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 11 July 2023

250/125Mbps	300/150Mbps	R 1 099	R 1 099
500/250Mbps	500/250Mbps	R 1 279	R 1 339

Source: ICASA Database based on Tariff Notifications

The table above shows that the MWEB on Openserve 150/75Mbps FTTH experienced a line speed upgrade at no additional cost to customers. The MWEB on Openserve 500/250Mbps package is comparable to the Lasernet on Openserve 500/250Mbps[47] (filed 31 August 2022) package which is priced at R 1 499 or 11.9% more.

The amendment of the MWEB on Openserve FTTH plan became effective on 01 April 2023.

2.7.2.19. Cybersmart on Openserve Uncapped Fibre Lite

Cybersmart filed an amendment of its Openserve Uncapped Fibre Lite plan with the Authority on 03 March 2023. The amendment of the Cybersmart on Openserve Uncapped Fibre Lite plan entailed line speed upgrades and price adjustments. Table 72 below details the amendment of the Cybersmart on Openserve Uncapped Fibre Lite plan.

Table 72: Cybersmart on Openserve Uncapped Fibre Lite

Previous Line Speed	Current Line Speed	Previous Price	Current Price
25/10Mbps	40/20Mbps	R 458	R 519
25/25Mbps	40/40Mbps	R 498	R 559
50/25Mbps	75/50Mbps	R 658	R 729
50/50Mbps	75/75Mbps	R 699	R 769
100/50Mbps	150/75Mbps	R 899	R 959
100/100Mbps	150/150Mbps	R 999	R 1 059
250/125Mbps	300/150Mbps	R 1 099	R 1 159
500/250Mbps	500/250Mbps	R 1 248	R 1 309

Source: ICASA Database based on Tariff Notifications

The table above shows that Cybersmart's 250/125Mbps on Openserve, for example, realised a line speed upgrade to 300/150Mbps with a corresponding increase in price from R 1 099 to R 1 159. The Cybersmart on Openserve Uncapped Fibre Lite 500/250Mbps package is comparable to the Lasernet on Openserve

[47] Page 70, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 11 July 2023

500/250Mbps[48] (filed 31 August 2022) package which is priced at R 1 499 or 14.5% more.

The amendment of the Cybersmart on Openserve Uncapped Fibre Lite plan became effective on 31 March 2023.

2.7.2.20. Cybersmart on Openserve Uncapped Premium Fibre

Cybersmart filed an amendment of its Openserve Uncapped Premium Fibre plan with the Authority on 03 March 2023. The amendment of the Cybersmart on Openserve Uncapped Premium Fibre plan entailed line speed upgrades and price adjustments. Table 73 below details the amendment of the Cybersmart on Openserve Uncapped Premium Fibre plan.

Table 73: Cybersmart on Openserve Uncapped Premium Fibre

Previous Line Speed	Current Line Speed	Previous Price	Current Price
25/10Mbps	40/20Mbps	R 559	R 619
25/25Mbps	40/40Mbps	R 599	R 659
50/25Mbps	75/50Mbps	R 759	R 829
50/50Mbps	75/75Mbps	R 799	R 869
100/50Mbps	150/75Mbps	R 999	R 1 059
N/A	150/150Mbps	N/A	R 1 159
250/125Mbps	300/150Mbps	R 1 199	R 1 259
500/250Mbps	500/250Mbps	R 1 349	R 1 409

Source: ICASA Database based on Tariff Notifications

The table above shows that Cybersmart's 250/125Mbps on Openserve, for example, realised a line speed upgrade to 300/150Mbps with a corresponding increase in price from R 1 199 to R 1 259. The Cybersmart on Openserve Uncapped Premium Fibre 500/250Mbps package is comparable to the Lasernet on Openserve 500/250Mbps[49] (filed 31 August 2022) package which is priced at R 1 499 or 6.4% more.

[48] Page 70, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 11 July 2023

[49] Page 70, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 11 July 2023

The amendment of the Cybersmart on Openserve Uncapped Fibre Lite plan became effective on 31 March 2023.

2.7.2.21. Cipherwave on Balwin Fibre Packages

Cipherwave filed an amendment of its Balwin Fibre Packages plan with the Authority on 15 March 2023. The amendment entailed price adjustments, the introduction and the termination of certain packages on the Balwin network. Table 74 below details the amendment of the Cipherwave on Balwin Fibre Packages plan.

Table 74: Cipherwave on Balwin Fibre Packages

Product Description	Previous Price	Current Price	Difference	Variance (%)
4/1Mbps	R 478	R 518	R 40	8.4%
50/50Mbps	R 778	R 828	R 50	6.4%
100/100Mbps	R 898	R 958	R 60	6.7%
200/200Mbps	R 1 048	R 1 148	R 100	9.5%
New Package				
Product Description			**Price**	
35/35Mbps			R 698	
Terminated Package				
25/25Mbps			R 648	

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the 200/200Mbps package on Cipherwave on Balwin Fibre Packages plan incurred the largest price increase in absolute value and percentage terms of R 100 or 9.5%, increasing from R 1 048 to R 1 148.

The amendment of the Cipherwave on Balwin Fibre Packages plan became effective on 01 April 2023.

2.7.2.22. Cipherwave on Octotel FTTH

Cipherwave filed an amendment of its Octotel FTTH plan with the Authority on 15 March 2023. The amendment entailed price adjustments, line speed upgrades, the introduction and termination of packages. Table 75 below details the amendment of the Cipherwave on Octotel FTTH plan.

Table 75: Cipherwave on Octotel FTTH

Previous Line Speed	Current Line Speed	Previous Price	Current Price	Difference	Variance (%)
35/25Mbps	50/50Mbps	R 798	R 738	-R 60	-7.5%
50/50Mbps	100/100Mbps	R 998	R 898	-R 100	-10%
100/100Mbps	200/200Mbps	R 1 208	R 998	-R 210	-17.4%
New Packages					
Product Description			**Price**		
10/5Mbps			R 338		
25/25Mbps			R 518		
400/200Mbps			R 1 108		
1000/200Mbps			R 1 548		
Terminated Package					
35/25Mbps			R 698		

Source: ICASA Database based on Tariff Notifications

As shown in the table above, Cipherwave's FTTH on Octotel realised line speed upgrades while the subscription fees were reduced, with the reductions ranging between 7.5% to 17.4%. The 200/200Mbps package on Cipherwave on Octotel incurred the largest price reduction in absolute value and percentage terms of R 210 or 17.4%. The Cipherwave on Octotel 200/200Mbps FTTH package is comparable to the Lasernet on Octotel Fibre 200/200Mbps package[50] which is priced at R 1 199 or 20.1% more.

The amendment of the Cipherwave on Octotel FTTH plan became effective on 01 April 2023.

2.7.2.23. Cipherwave on Frogfoot FTTH

Cipherwave filed an amendment of its Frogfoot FTTH plan with the Authority on 15 March 2023. The amendment entailed the introduction of new line speed packages at prices ranging from R 588 to R 1 688, and the termination of packages on the Frogfoot network. Table 76 below details the amendment of the Cipherwave on Frogfoot FTTH plan.

[50] Page 70, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 11 July 2023

Table 76: Cipherwave on Frogfoot FTTH

New Packages	
Product Description	**Price**
40/10Mbps	R 588
40/40Mbps	R 698
80/20Mbps	R 698
80/80Mbps	R 798
150/30Mbps	R 848
150/150Mbps	R 928
250/50Mbps	R 998
250/250Mbps	R 1 088
500/100Mbps	R 1 288
500/500Mbps	R 1 388
1000/200Mbps	R 1 588
1000/1000Mbps	R 1 688
Terminated Packages	
30/3Mbps	R 488
30/30Mbps	R 688
50/5Mbps	R 688
50/50Mbps	R 798
100/100Mbps	R 898
200/200Mbps	R 998
500/500Mbps	R 1 388

Source: ICASA Database based on Tariff Notifications

The Cipherwave on Frogfoot 40/10Mbps FTTH package is comparable to the Amobia on Frogfoot 40/10Mbps package[51] which is priced at R 649 or 10.4% more.

The amendment of the Cipherwave on Frogfoot FTTH plan became effective on 01 April 2023.

2.7.2.24. Cipherwave on MetroFibre FTTH

Cipherwave filed an amendment of its Metrofibre FTTH plan with the Authority on 15 March 2023. The amendment entailed the introduction and termination of packages. Table 77 below details the amendment of the Cipherwave on Metrofibre FTTH plan.

Table 77: Cipherwave on Metrofibre FTTH

New Package	
Product Description	**Price**

[51] Page 84, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 11 July 2023

400/400Mbps	R 998
Terminated Package	
200/200Mbps	R 998

Source: ICASA Database based on Tariff Notifications

The amendment of the Cipherwave on Metrofibre FTTH plan came into effect on 01 April 2023.

2.7.2.25. Cipherwave on Openserve FTTH

Cipherwave filed an amendment of its Openserve FTTH plan with the Authority on 15 March 2023. The amendment entailed the introduction of new line speed packages at prices ranging from R 558 to R 1 338, and the termination of packages on the Openserve network.

Table 78 below details the amendment of the Cipherwave on Openserve FTTH plan.

Table 78: Cipherwave on Openserve FTTH

New Packages	
Product Description	**Price**
40/20Mbps	R 558
40/40Mbps	R 648
75/50Mbps	R 748
75/75Mbps	R 848
150/75Mbps	R 988
150/150Mbps	R 1 048
300/150Mbps	R 1 188
500/250Mbps	R 1 338
Terminated Packages	
25/10Mbps	R 498
25/25Mbps	R 588
50/25Mbps	R 688
50/50Mbps	R 788
100/50Mbps	R 928
200/100Mbps	R 1 128

Source: ICASA Database based on Tariff Notifications

The Cipherwave on Openserve 500/250Mbps package is comparable to the Lasernet on Openserve 500/250Mbps package[52] which is priced at R 1 499 or 12% more.

The amendment of the Cipherwave on Openserve FTTH plan became effective on 01 April 2023.

2.7.2.26. Vodacom Fibre Broadband Tariffs on Openserve

Vodacom filed its Fibre Broadband on Openserve plan with the Authority on 16 March 2023 wherein it introduced new fibre packages in the plan. Table 79 below shows the new Fibre Broadband on Openserve.

Table 79: Vodacom Fibre Broadband Tariffs on Openserve

Line Speed (Mbps)	Standard Monthly Subscription	Promotional Subscription Fee	Price Difference	Variance (%)
40/20	R 599	R 399	-R 200	-33.4%
40/40	R 649	N/A		
75/50	R 799	R 599	-R 200	-25%
75/75	R 899	N/A		
150/75	R 1 049	R 799	-R 250	-23.8%
150/150	R 1 099	N/A		
300/150	R 1 199	R 899	-R 300	-25%
500/250	R 1 349	R 999	-R 350	-25.9%

Source: ICASA Database based on Filed Tariff Notifications

It should be noted that the operator is also running a promotional offer on the plan wherein it offers discounted subscription fees on selected fibre packages to customers subscribing to a 12-month and/or 24-month contractual period, as shown in the table above. The promotion is applicable on the first 2 months for the 12-month contract and applicable on the first 4 months for the 24-month contract, thereafter Vodacom charges the standard subscription fee applicable to the package.

[52] Page 70, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 11 July 2023

Vodacom's 40/40Mbps fibre packages on Openserve can be compared to Cell C's Home Connecta Fibre priced at R 629, which is 3.1% lower than Vodacom's price on the same line speed.

Vodacom's Fibre Broadband on Openserve became effective on 01 April 2023. The promotional aspect of the offer was expected to run until 30 June 2023; however, Vodacom extended the promotion on 13 June 2023 to 30 November 2023.

2.7.2.27. Cipherwave on Thinkspeed FTTH

Cipherwave filed its Thinkspeed FTTH plan with the Authority on 17 March 2023. The Cipherwave on Thinkspeed FTTH plan entailed line speed packages with prices ranging from R 568 to R 1 348, as shown in table 80 below.

Table 80: Cipherwave on Thinkspeed FTTH

Product Description	Price
30/15Mbps	R 568
30/30Mbps	R 658
50/25Mbps	R 698
50/50Mbps	R 828
100/50Mbps	R 888
100/100Mbps	R 948
200/100Mbps	R 1 088
200/200Mbps	R 1 108
500/250Mbps	R 1 248
500/500Mbps	R 1 448
1000/500Mbps	R 1 348

Source: ICASA Database based on Tariff Notifications

The Cipherwave on Thinkspeed FTTH plan was launched in the market on 01 April 2023.

2.7.2.28. Lasernet on Openserve FTTH

Lasernet filed an amendment of its Openserve FTTH plan with the Authority on 24 March 2023. The amendment of the Lasernet on Openserve FTTH plan entailed

the introduction, termination and price adjustment of certain packages. Table 81 below details the amendment of the Lasernet on Openserve FTTH plan.

Table 81: Lasernet on Openserve FTTH

Product Description			Price	
New Packages				
40/20Mbps			R 639	
40/40Mbps			R 765	
75/50Mbps			R 799	
75/75Mbps			R 875	
150/75Mbps			R 1 049	
150/150Mbps			R 1 149	
300/150Mbps			R 1 325	
Amended Packages				
Product Description	**Previous Price**	**Current Price**	**Difference**	**Variance (%)**
500/250Mbps	R 1 499	R 1 599	R 100	6.7%
Terminated Packages				
Product Description			**Price**	
25/10Mbps			R 495	
25/25Mbps			R 639	
50/25Mbps			R 765	
50/50Mbps			R 799	
100/50Mbps			R 949	
100/100Mbps			R 999	
250/125Mbps			R 1 149	

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the only package to experience a price increase of 6.7% was the Lasernet on Openserve 500/250Mbps FTTH, which is comparable to the Cybersmart on Openserve Fibre Uncapped Premium + (SLA) 500/250Mbps package[53] which is priced at R 1 949 or 21.9% more.

The amendment of the Lasernet on Openserve FTTH plan became effective on 04 April 2023.

[53] Page 83, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za)> Accessed on 11 July 2023

2.7.2.29. MTN Supersonic on Openserve/Octotel Fibre Amendment

MTN filed an amendment to its Supersonic on Openserve and Octotel Fibre Broadband plans with the Authority on 24 March 2023 wherein it increased the line speeds for selected fibre packages, adjusted the subscription and also introduced new line speeds. Table 82 below details the amendment.

Table 82: MTN Supersonic on Openserve and Octotel Fibre

Previous Line Speed (Mbps)	Previous Price (Incl. VAT)	Current Line Speed (Mbps)	Current Price (Incl. VAT)		
MTN Supersonic on Openserve Tariff Changes					
25/10	R 495	40/20	R 549		
25/25	R 579	40/40	R 639		
50/25	R 699	75/50	R 729		
50/50	R 749	75/75	R 809		
100/50	R 895	150/75	R 949		
N/A		150/150	R 1 029		
200/100	R 1 049	300/150	R 1 099		
500/250	R 1 199	500/250	R 1 249		
MTN Supersonic on Octotel Tariff Changes					
Previous Line Speed (Mbps)	**Previous Price (Incl. VAT)**	**Current Line Speed (Mbps)**	**Current Price (Incl. VAT)**	**Price Difference**	**Variance (%)**
N/A		10/5	R 339	N/A	
N/A		25/25	R 519	N/A	
35/25	R 695	50/50	R 729	R 34	4.9%
50/50	R 799	100/100	R 879	R 80	10%
100/100	R 1 099	200/200	R 1 049	-R 50	-4.5%
200/200	R 1 249	400/200	R 1 099	-R 150	-12%
1000/100	R 1 999	1000/200	R 1 399	-R 600	-30%

Source: ICASA Database based on Filed Tariff Notifications

The MTN Supersonic 25/25Mbps package on Openserve for example, was upgraded to a 40/40Mbps line speed, accompanied with an increase in the subscription fee from R 579 to R 639.

Octotel introduced a 10/5Mbps and 25/25Mbps packages which are priced at R 339 and R 519, respectively. It should be noted that some of the Octotel packages realised a tariff decrease while the line speeds were upgraded. For example, the largest decrease occurred on the 1000/100Mbps package, where it was reduced by R 600 or 30% from R 1 999 to R 1 399 while the line speed was upgraded from, 1000/100Mbps to 1000/200Mbps.

MTN's amendment to the Supersonic on Openserve and Octotel Fibre Broadband plans came to effect on 03 April 2023.

2.7.2.30. Amobia on Buh-Rein FTTH

Amobia filed amendments of its Buh-Rein FTTH plan with the Authority on 27 and 29 March 2023. The amendments of the Amobia on Buh-Rein FTTH plan entailed the introduction of line speed packages ranging from 25/10Mbps to 1000/500Mbps, and the termination of certain packages. Table 83 below details the amendments of the Amobia on Buh-Rein FTTH plan.

Table 83: Amobia on Buh-Rein FTTH

New Packages	
27 March 2023	
Product Description	
25/10Mbps	R 399
35/15Mbps	R 445
50/25Mbps	R 505
50/50Mbps	R 555
100/50Mbps	R 610
100/100Mbps	R 720
200/50Mbps	R 710
200/200Mbps	R 850
500/100Mbps	R 820
500/500Mbps	R 950
1000/500Mbps	R 1 250
29 March 2023	
300/50Mbps	R 820
500/200Mbps	R 950
Terminated Packages	
27 March 2023	
20/10Mbps	R 399
15/10Mbps	R 445
30/15Mbps	R 505
30/30Mbps	R 555
50/25Mbps	R 610
50/50Mbps	R 720
100/25Mbps	R 710
100/100Mbps	R 850
200/50Mbps	R 820
200/200Mbps	R 950
500/200Mbps	R 1 050
500/500Mbps	R 1 100
29 March 2023	
500/100Mbps	R 820
500/500Mbps	R 950

Source: ICASA Database based on Tariff Notifications

The amendments of the Amobia on Buh-Rein FTTH plan became effective on 06 and 08 April 2023.

2.7.2.31. E Wisp on Openserve FTTH

E Wisp filed an amendment of its Openserve FTTH plan with the Authority on 29 March 2023, which entailed the introduction of two line speed packages priced from R 610 to R 1 155, and the termination of certain packages. Table 84 below details the amendment of the E Wisp on Openserve FTTH plan.

Table 84: E Wisp on Openserve FTTH

New Packages	
Product Description	**Price**
40/20Mbps	R 610
40/40Mbps	R 670
75/50Mbps	R 815
75/75Mbps	R 875
150/75Mbps	R 955
150/150Mbps	R 1 015
300/150Mbps	R 1 155
Terminated Packages	
25/25Mbps	R 610
50/25Mbps	R 815
100/50Mbps	R 955
200/100Mbps	R 1 155

Source: ICASA Database based on Tariff Notifications

The E Wisp on Openserve 40/20Mbps is comparable to the Lasernet on Openserve Fibre 40/20Mbps package which is priced at R 535 or 12.3% less. The amendment of the E Wisp on Openserve FTTH plan became effective on 07 April 2023.

2.7.2.32. Amobia on Openserve FTTH

Amobia filed an amendment of its Openserve FTTH plan with the Authority on 06 April 2023. The amendment of the Amobia on Openserve FTTH plan entailed the introduction and termination of certain packages. Table 85 below details the amendment of the Amobia on Openserve FTTH plan.

Table 85: Amobia on Openserve FTTH

New Packages	
Product Description	**Price**
40/20Mbps Lite	R 535
40/40Mbps	R 595
75/50Mbps Lite	R 715
75/75Mbps	R 795

150/75Mbps Lite	R 945
150/150Mbps	R 1 015
300/150Mbps	R 1 145
500/250Mbps	R 1 355
Terminated Packages	
25/10Mbps	R 489
25/25Mbps	R 549
50/25Mbps	R 659
50/50Mbps	R 739
100/50Mbps	R 899
200/100Mbps	R 1 099
500/250Mbps	R 1 299

Source: ICASA Database based on Tariff Notifications

Amobia's amendment of its Openserve FTTH plan resulted in the introduction of line speed packages ranging from 40/20Mbps Lite to 500/250Mbps. The Amobia on Openserve 500/250Mbps is comparable to the Lasernet on Openserve Fibre 500/250Mbps[54] package which is priced at R 1 499 or 10.6% more.

The amendment of the Amobia on Openserve FTTH plan became effective on 18 April 2023.

2.7.2.33. Cybersmart on Thinkspeed FTTH

Cybersmart filed its Thinkspeed FTTH plan with the Authority on 11 April 2023, which entailed the introduction of line speed packages priced from R 599 to R 1 309. Table 86 below details the Cybersmart on Thinkspeed FTTH plan.

Table 86: Cybersmart on Thinkspeed FTTH

Product Description	Price (Incl. VAT)
30/15Mbps	R 599
50/25Mbps	R 759
100/50Mbps	R 989
200/100Mbps	R 1 149
500/250Mbps	R 1 309

Source: ICASA Database based on Tariff Notifications

The amendment of the Cybersmart on Thinkspeed FTTH plan became effective on 26 April 2023.

[54] Page 70, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 11 July 2023

2.7.2.34. MTN Supersonic Low Cost FTTH Products

MTN filed its Supersonic Low Cost FTTH plan with the Authority on 18 April 2023. The operator offers prepaid and post-paid customers wireless fibre services, as shown in tables 87 and 88 below.

Table 87: MTN Supersonic on Openserve Web Connect

Line Speed (Mbps)	Recommended Retail Price (Incl. VAT)
20/10	R 299
30/10	R 369

Source: ICASA Database based on Tariff Notifications

The packages on the table above are available to customers as post-paid Home Fibre service, based on Openserve's Web Connect service.

Table 88: MTN Supersonic Low Cost FTTH Products

Speed (Mbps)	Term/Validity	Recommended Retail Price (Incl. VAT)
Frogfoot Access Leap Prepaid		
10/5	7 Days	R 69
	14 Days	R 134
	30 Days	R 249
20/10	7 Days	R 99
	14 Days	R 189
	30 Days	R 349
50/25	7 Days	R 139
	14 Days	R 269
	30 Days	R 499
Frogfoot Access Home Air - Prepaid		
10/1	7 Days	R 89
	14 Days	R 169
	30 Days	R 319
20/2	7 Days	R 109
	14 Days	R 209
	30 Days	R 389
20/20	7 Days	R 129
	14 Days	R 249
	30 Days	R 449
50/50	7 Days	R 199
	14 Days	R 379
	30 Days	R 669

Source: ICASA Database based on Tariff Notifications

As shown in table 88 above, the fibre plans are offered on a prepaid basis, with varying validity periods. For example, customers can purchase uncapped Air fibre on Frogfoot valid for 14 days at a price of R 249, or, for 30 days at a price of R 449.

MTN introduced the Supersonic Low Cost FTTH in the market on 01 May 2023.

2.7.2.35. Cell C Home Connecta Fibre Tariff Plans

Cell C filed an amendment of its Home Connecta Fibre Tariff Plans with the Authority on 20 April 2023. The amendment of the Cell C Home Connecta Fibre Tariff Plans entailed the addition of FTTH line speed packages with prices ranging from R 359 to R 929. Table 89 below details the Cell C Home Connecta Fibre Tariff Plans.

Table 89: Cell C Home Connecta Fibre Tariff Plans

Vumatel	
Product Description	**Price (Incl. VAT)**
C Fibre 50Mbps/50Mbps	R 699
Cell C Fibre 100Mbps/100Mbps	R 885
Openserve	
C Fibre 40Mbps/20Mbps	R 599
C Fibre 40Mbps/40Mbps	R 629
Frogfoot	
C Fibre 40Mbps/10Mbps	R 619
C Fibre 40Mbps/10Mbps	R 619
MetroFibre Networx	
C Fibre 20Mbps/20Mbps	R 459
C Fibre 50Mbps/50Mbps	R 649
Octotel	
C Fibre 10Mbps/5Mbps	R 359
C Fibre 25Mbps/25Mbps	R 519
FibreSuburb Networks	
C Fibre 10Mbps/10Mbps	R 529
C Fibre 25Mbps/25Mbps	R 679
Purple Forest	
C Fibre 10Mbps/10Mbps	R 599
C Fibre 20Mbps/20Mbps	R 749
Warefall Access Network Networks	
C Fibre 10Mbps/10Mbps	R 599
C Fibre 20Mbps/20Mbps	R 799
Netstream	
C Fibre 10Mbps/10Mbps	R 749
C Fibre 20Mbps/20Mbps	R 849
Mitsol	
C Fibre 10Mbps/10Mbps	R 659
C Fibre 20Mbps/20Mbps	R 749
Link Layer	
C Fibre 25Mbps/25Mbps	R 799
C Fibre 50Mbps/50Mbps	R 929
Zoom	
C Fibre 10Mbps/10Mbps	R 409
C Fibre 25Mbps/25Mbps	R 569

Source: ICASA Database based on Tariff Notifications

As depicted in the table above, Cell C's amendment of its Home Connecta Fibre Tariff Plans resulted in the introduction of line speed packages ranging from 10/5Mbps to 100/1000Mbps. The Cell C Home Connecta on Zoom 10/10Mbps is comparable to the MTN Supersonic on Zoom 10/10Mbps[55] package which is priced at R 369 or 9.8% less. The amendment of the Cell C Home Connecta Fibre Tariff Plans became effective on 03 May 2023.

2.7.2.36. Amobia on VUMA FTTH

Amobia filed an amendment of its VUMA FTTH plan with the Authority on 21 April 2023, which entailed price increases ranging from 0.8% to 2.5% on certain packages. Table 90 below details the changed on the Amobia on VUMA FTTH plan.

Table 90: Amobia on VUMA FTTH

Product Description	Previous Price	Current Price	Difference	Variance (%)
50/50Mbps	R 649	R 665	R 16	2.5%
100/100Mbps	R 799	R 815	R 16	2%
200/200Mbps	R 999	R 1 015	R 16	1.6%
500/200Mbps	R 1 189	R 1 205	R 16	1.3%
1000/200Mbps	R 1 399	R 1 415	R 16	1.1%
1000/500Mbps	R 2 099	R 2 115	R 16	0.8%

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the largest price increase in percentage terms of 2.5% occurred on the Amobia on VUMA 50/50Mbps which increased from R 649 to R 665. The Amobia on VUMA 100/100Mbps is comparable to the Lasernet on VUMA Fibre 100/100Mbps[56] package which is priced at R 899 or 10.3% more.

The amendment of the Amobia on Vuma FTTH plan became effective on 01 June 2023.

[55] Page 77, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 02 May 2023
[56] Page 71, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 11 July 2023

2.7.2.37. Vodacom Fibre Broadband Tariffs on MetroFibre Networx

Vodacom's Fibre Broadband Tariffs on MetroFibre Networx was filed with the Authority on 26 April 2023 wherein it introduced new line speeds and ran a promotion on the new packages.

Table 91 below shows the tariff plan and the promotional aspect of it.

Table 91: Vodacom Fibre Broadband Tariffs on MetroFibre Networx

Line Speed (Mbps)	Standard Monthly Subscription	Promo Subscription (for first 3 Months and/or 6 Months)	Price Difference	Variance (%)
20/20	R 499	N/A	N/A	N/A
50/50	R 759	R 599	-R 160	-21.1%
100/100	R 949	R 749	-R 200	-21.1%
250/250	R 999	R 699	-R 300	-30%
400/400	R 1 049	R 799	-R 250	-23.8%
500/500	R 1 199	R 899	-R 300	-25%
1000/250	R 1 499	R 1 199	-R 300	-20%

Source: ICASA Database based on Tariff Notifications

It should be noted that the promotion offers customers discounted subscription fees. The table above shows that the largest tariff decrease in percentage terms occurred on the 250/250Mbps line speed wherein it decreased by 30% (or R 300) from R 999 to R 699. It should be noted that the promotional prices are applicable for the first 3 months for customers who sign up for the 12-month or MtM contract, and applicable for the first 6-months for the ones who sign up for the 24-month contract.

Vodacom's Fibre Broadband on MetroFibre Networx was introduced in the market on 06 May 2023, and the promotional offer was initially set to run from 09 May 2023 until 31 July 2023. However, on 06 July 2023, the operator extended the promotional offer to 30 November 2023.

2.7.2.38. Vodacom Fibre Broadband on Vumatel

Vodacom filed its Fibre Broadband on Vumatel with the Authority on 26 April 2023 wherein it offers customers with new fibre packages on Vumatel's network. The

operator also rewarded customers with promotional tariffs on the price plan. Table 92 details the offer.

Table 92: Vodacom Fibre Broadband on Vumatel Network

Line Speed (Mbps)	Monthly Subscription Fee	Promotional pricing (valid for 6 months)	Price Difference	Variance (%)
50/50	R 709	R 599	-R 110	-15.5%
100/100	R 909	R 599	-R 310	-34.1%
200/200	R 1 109	R 699	-R 410	-37%
500/200	R 1 309	R 799	-R 510	-39%
1000/250	R 1 509	R 899	-R 610	-40.4%
1000/500	R 2 309	R 1 599	-R 710	-30.7%

Source: ICASA Database based on Tariff Notifications

The table above shows that the discounts offered on Vodacom Fibre Broadband on Vumatel Network range from R 110 to R 710. For example, the 1000/500Mbps package realised a R 710 or 30.7% tariff reduction from R 2 309 to R 1 599, which is the largest subscription fee reduction in absolute value terms. It is worth noting that the promotional prices are only applicable on the first six months of the contractual period and standard pricing will apply thereafter.

A comparison can be made between Vodacom's 50/50Mbps package and Cool Ideas' 50/50Mbps package price at R 749, which is R 40 or 5.6% higher than what Vodacom charges.

Vodacom's Fibre Broadband on Vumatel plan was introduced in the market on 01 June 2023 and the promotional offer started on 09 May 2023 and will be in the market until 30 November 2023.

2.7.2.39. Amobia on Metro FTTH

Amobia filed an amendment of its Metro FTTH plan with the Authority on 03 May 2023. The amendment of the Amobia on Metro FTTH plan entailed price adjustments and the introduction of a new line speed package.

Table 93 below details the amendment of the Amobia on Metro FTTH plan.

Table 93: Amobia on Metro FTTH

Product Description	Previous Price	Current Price	Difference	Variance
50/50Mbps	R 649	R 709	R 60	9.2%
100/100Mbps	R 799	R 809	R 10	1.3%
400/400Mbps	N/A	R 989	N/A	N/A
1000/250Mbps	R 1 799	R 1 399	-R 400	-22.2%

Source: ICASA Database based on Tariff Notifications

As shown in the table above, a price reduction of R400 or 22.2% occurred on the Amobia on Metro 1000/250Mbps FTTH, which decreased from R 1 799 to R 1 399. The Amobia on Metro FTTH 50/50Mbps is comparable to the MTN Supersonic 50/50Mbps[57] package which is priced at R 799 or 12.7% more.

The amendment of the Amobia on Metro FTTH plan became effective on 12 May and 15 June 2023.

2.7.2.40. MTN Supersonic on MetroFibre FTTH

MTN's amendment to its Supersonic on MetroFibre FTTH plan was filed with the Authority on 15 May 2023. The amendment entailed a price reduction for the 50/50Mbps package and an introduction of the 250/250Mbps package.

The price of the 50/50Mbps MetroFibre FTTH package was decreased by R 50 or 6.7% from R 749 to R 699. The new 250/250Mbps package was introduced in the market at a retail price of R 809.

MTN's amendment to the Supersonic on MetroFibre FTTH came to effect on 01 June 2023.

[57] Page 52, available on ICASA's website: < Bi-Annual-Tariffs-Analysis-Report-Q4-2022-23 — Independent Communications Authority of South Africa (icasa.org.za) > Accessed on 02 May 2023

2.7.2.41. Cool Ideas Service Provider on TT Connect

Cool Ideas Service Provider filed an amendment of its TT Connect plan with the Authority on 19 May 2023. This amendment entailed line speed upgrades and price amendments across all packages, as shown in table 94 below.

Table 94: Cool Ideas Service Provider on TT Connect FTTH

Previous Line Speed	Current Line Speed	Previous Price	Current Price	Difference	Variance (%)
10/10Mbps	15/15Mbps	R 609	R 709	R 100	16.4%
20/20Mbps	30/30Mbps	R 769	R 889	R 120	15.6%
50/50Mbps	75/75Mbps	R 889	R 999	R 110	12.4%
100/100Mbps	150/150Mbps	R 1 049	R 1 199	R 150	14.3%
200/200Mbps	300/300Mbps	R 1 449	R 1 449	R 0	0%
300/300Mbps	450/450Mbps	R 1 659	R 1 599	-R 60	-3.6%
500/500Mbps	750/750Mbps	R 1 849	R 1 749	-R 100	-5.4%
1000/1000Mbps	N/A	R 2 389	R 1 999	-R 390	-16.3%

Source: ICASA Database based on Tariff Notifications

The table above shows that the largest price reduction in absolute terms of R 390 occurred on the Cool Ideas Service Provider on TT Connect 1000/1000Mbps which reduced from R 2 389 to R 1 999. The Cool Ideas Service Provider on Vumatel FTTH 150/150Mbps is comparable to the MWEB on Vumatel FTTx 150/150Mbps package which is priced at R 1 159 or 3.3% less.

The amendment of the Cool Ideas Service Provider on TT Connect FTTH plan became effective on 01 June 2023.

2.7.2.42. Cool Ideas Service Provider on Vumatel FTTH

Cool Ideas Services Provider filed an amendment of its Vumatel FTTH plan with the Authority on 19 May 2023. The amendment of the Cool Ideas Service Provider on Vumatel FTTH plan entailed price increases across all packages. Table 95 below details the amendment of the Cool Ideas Service Provider on Vumatel FTTH plan.

Table 95: Cool Ideas Service Provider on Vumatel FTTH

Product Description	Previous Price	Current Price	Difference	Variance (%)
50/50Mbps	R 699	R 749	R 50	7.2%
100/100Mbps	R 899	R 959	R 60	6.7%
200/200Mbps	R 1 099	R 1 169	R 70	6.4%
500/200Mbps	R 1 149	R 1 219	R 70	6.1%

1000/250Mbps	R 1 499	R 1 589	R 90	6%
1000/500Mbps	R 2 299	R 2 429	R 130	5.7%

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the largest price increase in percentage terms of 7.2% occurred on the Cool Ideas Service Provider on Vumatel 50/50Mbps which increased from R 699 to R 749. The Cool Ideas Service Provider on Vumatel FTTH 500/200Mbps is comparable to the MWEB on Vumatel FTTx 500/200Mbps package which is priced at R 1 189 or 2.5% less.

The amendment of the Cool Ideas Service Provider on Vumatel FTTH plan became effective on 01 June 2023.

2.7.2.43. Cool Ideas Service Provider on Vumatel (Reach) Kimberley

Cool Ideas Service Provider filed its Vumatel (Reach) Kimberley plan with the Authority on 19 May 2023. The Cool Ideas Service Provider on Vumatel (Reach) Kimberley plan entails a single line speed which is priced at R 249. Table 96 below details the Cool Ideas Service Provider on Vumatel (Reach) Kimberley plan.

Table 96: Cool Ideas Service Provider on Vumatel (Reach) Kimberley

Product Description	Price
10/10Mbps	R 249

Source: ICASA Database based on Tariff Notifications

The Cool Ideas Service Provider on Vumatel (Reach) Kimberley plan was launched on 01 June 2023.

2.7.2.44. Cool Ideas Service Provider on MetroFibre FTTH

Cool Ideas Service Provider filed its MetroFibre FTTH plan with the Authority on 19 May 2023. The Cool Ideas Service Provider on MetroFibre FTTH plan entails a single 20/20Mbps package which is priced at R 359 that is available in the following areas Bloemhof, Beaufort West, Christiana, Warrenton and Queenstown on the MetroFibre network.

The Cool Ideas Service Provider on MetroFibre FTTH plan was launched in the respective areas on 01 June 2023.

2.7.2.45. Cybersmart on Vumatel FTTH

Cybersmart filed its Vumatel FTTH plan with the Authority on 24 May 2023. The Cybersmart on Vumatel FTTH plan entails two month-to-month line speed packages priced from R 2 109 to R 2 399. Table 97 below details the Cybersmart on Vumatel FTTH plan.

Table 97: Cybersmart on Vumatel FTTH

Product Description	Price
1000/200Mbps	R 2 109
1000/500Mbps	R 2 399
Migration Fee Once-Off	R 1 008

Source: ICASA Database based on Tariff Notifications

The Cybersmart on Vumatel FTTH plan was launched on 01 June 2023.

2.7.2.46. Cybersmart on Vumatel Home Fibre

Cybersmart filed an amendment of its Vumatel Home Fibre plan with the Authority on 24 May 2023. The amendment of the Cybersmart on Vumatel Home Fibre plan entailed price adjustments across all packages. Table 98 below details the amendment of the Cybersmart on Vumatel Home Fibre plan.

Table 98: Cybersmart on Vumatel Home Fibre

Product Description	Previous Price	Current Price	Difference	Variance (%)
50/50Mbps	R 628.90	R 649	R 20.10	3.2%
100/100Mbps	R 828.90	R 849	R 20.10	2.4%
200/200Mbps	R 928	R 1 009	R 81	8.7%
500/200Mbps	R 1 139	R 1 169	R 30	2.6%

Source: ICASA Database based on Tariff Notifications

As tabulated above, the largest tariff increase in percentage terms of 8.7% occurred on the Cybersmart on Vumatel Home Fibre 200/200Mbps which increased from R 928 to R 1 009. The Cybersmart on Vumatel Home Fibre

500/200Mbps is comparable to the MWEB on Vumatel FTTx 500/200Mbps package which is priced at R 1 189 or 1.7% more.

The Cybersmart on Vumatel Home Fibre plan was launched on 01 June 2023.

2.7.2.47. MWEB on Octotel FTTH

MWEB filed an amendment of its Octotel FTTH plan with the Authority on 30 May 2023. The amendment of the MWEB on Octotel FTTH plan entailed a line speed upgrade and price increases across all packages. The amendment of the MWEB on Octotel FTTH plan is detailed in table 99 below.

Table 99: MWEB on Octotel FTTH

Previous Line Speed	Current Line Speed	Previous Price (Incl. VAT)	Current Price (Incl. VAT)
50/50Mbps	100Mbps	R 749	R 859
100/100Mbps	200Mbps	R 959	R 1 049
200/200Mbps	400Mbps	R 1 149	R 1 185

Source: ICASA Database based on Tariff Notifications

As shown in the table above, all three packages realised line speed upgrades with corresponding increases in subscription fees. For example, the Octotel 100Mbps FTTH package was upgraded to 200Mbps and the increase in the subscription fee from R 749 to R 859 reflects the upgrade in the line speed.

The amendment of the MWEB on Octotel FTTH plan became effective on 01 July 2023.

2.7.2.48. ASAP Internet on Frogfoot Air Internet

ASAP Internet filed an amendment of its Frogfoot Air Internet plan with the Authority on 07 June 2023. The amendment of the ASAP Internet on Frogfoot Air Internet plan entailed price adjustments across all packages. Table 100 below details the ASAP Internet on Frogfoot Air Internet plan.

Table 100: ASAP Internet on Frogfoot Air Internet

Product Description	Previous Price	Current Price	Difference	Variance (%)
10/10Mbps	R 290	R 300	R 10	3.4%

20/20Mbps	R 405	R 420	R 15	3.7%

Source: ICASA Database based on Tariff Notifications

The table above shows that the largest price increase in absolute and percentage terms of R 15 or 3.7% occurred on the ASAP Internet on Frogfoot Air Internet 20/20Mbps which increased from R 405 to R 420.

The amendment of the ASAP Internet on Frogfoot Air Internet plan became effective on 01 July 2023.

2.7.2.49. Cipherwave on DNATel Packages

Cipherwave filed an amendment of its DNATel Packages plan with the Authority on 07 June 2023, which entailed price adjustments, the introduction and termination of certain packages. Table 101 below details the amendment of the Cipherwave on DNATel Packages plan.

Table 101: Cipherwave on DNATel Packages

Amended Packages				
Product Description	**Previous Price**	**Current Price**	**Difference**	**Variance (%)**
10/10Mbps	R 708	R 528	-R 180	-25.4%
50/50Mbps	R 1 248	R 628	-R 620	-49.7%
100/100Mbps	R 1 008	R 728	-R 280	-27.8%
200/200Mbps	R 1 058	R 798	-R 260	-24.6%
New Packages				
Product Description			**Price**	
30/30Mbps			R 598	
500/500Mbps			R 1 048	
Terminated Packages				
25/25Mbps			R 848	
40/40Mbps			R 998	

Source: ICASA Database based on Tariff Notifications

The table above shows that the largest price reduction in absolute and percentage terms of R 620 and 49.7% occurred on the Cipherwave on DNATel Packages 50/50Mbps which decreased from R 1 248 to R 628.

The amendment of the Cipherwave on DNATel Packages plan became effective on 01 July 2023.

2.7.2.50. MTN Supersonic on VumaReach 10/10Mbps in Kimberley

MTN Supersonic filed its VumaReach 10/10Mbps in Kimberley with the Authority on 09 June 2023, wherein it introduced a Pilot Vumatel VumaReach 10/10Mbps product only available in the city of Kimberley. The FNO's recommended retail price for the 10/10Mbps package was set at R 249 per month.

MTN's Supersonic on VumaReach 10/10Mbps in Kimberley was launched in the market on 19 June 2023.

2.7.2.51. Vodacom Fibre Broadband on TT Connect

Vodacom's amendment to its Fibre Broadband on TT Connect was filed with the Authority on 13 June 2023. The amendment entails an introduction of new revamped fibre packages in the plan. Table 102 below shows the new fibre packages offered by Vodacom on the TT Connect network.

Table 102: Vodacom Fibre Broadband tariffs on the TT Connect

Line Speed	Contract term	Monthly Subscription (Incl. VAT)
15Mbps	24m	R 699
30Mbps	24m	R 849
75Mbps	24m	R 949
150Mbps	24m	R 1 149
300Mbps	24m	R 1 449
450Mbps	24m	R 1 649
750Mbps	24m	R 1 849
1000Mbps	24m	R 1 999
15Mbps	12m	R 699
30Mbps	12m	R 849
75Mbps	12m	R 949
150Mbps	12m	R 1 149
300Mbps	12m	R 1 449
450Mbps	12m	R 1 649
750Mbps	12m	R 1 849
1000Mbps	12m	R 1 999
15Mbps	MtM	R 699
30Mbps	MtM	R 849
75Mbps	MtM	R 949
150Mbps	MtM	R 1 149
300Mbps	MtM	R 1 449
450Mbps	MtM	R 1 649
750Mbps	MtM	R 1 849
1000Mbps	MtM	R 1 999

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the packages are offered on a MtM, 12-month and 24-month contractual periods, with line speeds ranging from 15Mbps to 1Gbps.

Vodacom's amendment to the Fibre Broadband on TT Connect came to effect on 28 June 2023.

2.7.2.52. ASAP Internet on MetroFibre Internet

ASAP Internet filed an amendment of its MetroFibre Internet plan with the Authority on 13 June 2023, which as detailed in table 103 below entailed price adjustments on certain packages.

Table 103: ASAP Internet on MetroFibre Internet

Product Description	Previous Price	Current Price	Difference	Variance (%)
50/50Mbps	R 645	R 690	R 45	7%
100/100Mbps	R 825	R 850	R 25	3%
1000/500Mbps	R 1 850	R 1 450	-R 400	-21.6%

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the largest increase in percentage terms of 7% occurred on the ASAP Internet on MetroFibre 50/50Mbps which increased from R 645 to R 690.

The amendment of the ASAP Internet on MetroFibre Internet plan became effective on 01 July 2023.

2.7.2.53. Cell C Home Connecta Fibre

Cell C filed an amendment of its Home Connecta Fibre plan with the Authority on 14 June 2023. The amendment of the Cell C Home Connecta Fibre plan entailed price increases on the MetroFibre Networx. Table 104 below shows the amendment of the Cell C Home Connecta Fibre plan.

Table 104: Cell C Home Connecta Fibre

MetroFibre Networx				
Product Description	**Previous Price (Incl. VAT)**	**Current Price (Incl. VAT)**	**Difference**	**Variance (%)**
C Fibre 20Mbps/20Mbps	R 459	R 499	R 40	8.7%
C Fibre 50Mbps/50Mbps	R 649	R 739	R 90	13.9%

Source: ICASA Database based on Tariff Notifications

The table above shows that the largest increase in percentage and absolute terms of 13.9% or R 90 occurred on the Cell C Home Connecta on MetroFibre Networx 50/50Mbps which increased from R 649 to R 739. The Cell C Home Connecta on MetroFibre Networx 50/50Mbps is comparable to the MWEB on MetroFibre Networx 50Mbps FTTH package which is priced at R 769 or 4.1% more.

The amendment of the Cell C Home Connecta Fibre plan became effective on 27 June 2023.

2.7.2.54. Cybersmart on Lightstruck Uncapped Home Fibre

Cybersmart filed an amendment of its Lightstruck Uncapped Home Fibre plan with the Authority on 20 June 2023. The amendment of the Cybersmart on Lightsruck Uncapped Home Fibre plan entailed price adjustments and the introduction of new packages. Table 105 below details the amendment of the Cybersmart on Lightstruck Uncapped Home Fibre plan.

Table 105: Cybersmart on Lightstruck Uncapped Home Fibre

Product Description	**Previous Price (Incl. VAT)**	**Current Price (Incl. VAT)**	**Difference**	**Variance (%)**
50/50Mbps	R 789	R 819	R 30	3.8%
100/100Mbps	R 989	R 1 049	R 60	6.1%
200/200Mbps	R 1 089	R 1 229	R 140	12.9%
M2M				
Product Description				**Previous Price (Incl. VAT)**
30/10Mbps				R 589
30/30Mbps				R 679
50/25Mbps				R 769
100/50Mbps				R 979
200/100Mbps				R 1 199

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the largest price increase in absolute and percentage terms of R 140 or 12.9% occurred on the 200/200Mbps FTTH package which

increased from R 1 089 to R 1 229. The Cybersmart on Lightstruck 50/25Mbps is comparable to the MWEB on MetroFibre Networx 50/25Mbps FTTH package which is priced at R 745 or 3.1% less.

The amendment of the Cybersmart on Lightstruck Uncapped Home Fibre plan became effective on 01 July 2023.

2.7.2.55. ASAP Internet on TT Connect FTTH

ASAP Internet filed its TT Connect FTTH plan with the Authority on 26 June 2023. The ASAP Internet on TT Connect FTTH plan entails FTTH packages with line speeds ranging from 15/15Mbps to 1000/1000Mbps. Table 106 below details the ASAP Internet on TT Connect FTTH plan.

Table 106: ASAP Internet on TT Connect FTTH

Product Description	Price
15/15Mbps	R 610
30/30Mbps	R 775
75/75Mbps	R 865
150/150Mbps	R 1 025
200/200Mbps	R 1 300
300/300Mbps	R 1 500
750/750Mbps	R 1 700
1000/1000Mbps	R 2 000

Source: ICASA Database based on Tariff Notifications

The ASAP Internet on TT Connect 150/150Mbps is comparable to the MWEB on TT Connect 150/150Mbps FTTx package which is priced at R 1 159 or 13.1% more.

The ASAP Internet on TT Connect FTTH plan was launched on 07 July 2023.

2.7.3. Promotional FTTH Plans

2.7.3.1. Vodacom Self Build Overbuild and Low Uptake Precincts Promotion

Vodacom filed its Self Build Overbuild and Low Uptake Precincts promotion with the Authority on 22 February 2023. The promotion offers customers in selected

precincts discounted fibre prices for the first 12 months. Table 107 below details the promotional offer.

Table 107: Self Build Overbuild and Low Uptake Precincts Promotion

Line Speed (Mbps)	Discounted Monthly Subscription Month-to-Month Contract (first 12 Months)	Standard Monthly Subscription	Price Difference	Variance (%)
20/10	R 299	R 599	-R 300	-50.1%
20/20	R 349	R 649	-R 300	-46.2%
50/25	R 399	R 799	-R 400	-50.1%
50/50	R 449	R 899	-R 450	-50.1%
100/100	R 499	R 999	-R 500	-50.1%
200/200	R 599	R 1 199	-R 600	-50%

Source: ICASA Database based on Tariff Notifications

As shown in the table, the promotion offers an average tariff decrease of 50% on fibre packages from 20Mbps to 200Mbps. For example, the 50/25Mbps package realised a R 400 or 50.1% from R 799 to R 399.

Vodacom launched its promotional offer in the market on 03 March 2023 and it was expected to run until 30 June 2023. However, on 13 June 2023, the operator extended it to 30 November 2023.

2.7.3.2. Vodacom Self Build Fibre Broadband Promotion

Vodacom filed its Self Build Fibre Broadband Promotion with the Authority on 05 June 2023 wherein it offers discounted fibre packages on Vodacom's network. Table 108 below shows the promotional offer.

Table 108: Vodacom Self Build Fibre Broadband Promotion

Line Speed (Mbps)	Monthly Subscription	Monthly subscription (MtM, 12 Months and 24 Months Contract)	Price Difference	Variance (%)
20/10	R 599	R 399	-R 200	-33.4%
20/20	R 699	R 449	-R 250	-35.8%
50/25	R 799	R 599	-R 200	-25%
50/50	R 899	R 649	-R 250	-27.8%
100/100	R 999	R 749	-R 250	-25%
200/200	R 1 199	R 899	-R 300	-25%

Source: ICASA Database based on Tariff Notifications

As shown in the table above the subscription fee reduction ranged between 25% to 35.8%. The largest subscription fee reduction in absolute value terms occurred on the 200/200Mbps line speed where it was reduced by R 300 from R 1 199 to R 899.

Vodacom's Self Build Fibre Broadband Promotion was introduced in the market on 15 June 2023 and will run until 30 November 2023.

2.7.3.3. ASAP Internet on MetroFibre Internet Promotion

ASAP Internet filed its MetroFibre Internet Promotion with the Authority on 13 June 2023. The ASAP Internet on MetroFibre Promotion entails discounted FTTH packages only for new customers for a period of two months. Table 109 below details the ASAP Internet on MetroFibre Internet Promotion.

Table 109: ASAP Internet on MetroFibre Internet Promotion

Product Description	Standard Price	Promotional Price	Difference	Variance (%)
20/20Mbps	R 475	R 240	-R 235	-49.5%
50/50Mbps	R 690	R 345	-R 345	-50%
100/100Mbps	R 825	R 410	-R 415	-50.3%
250/250Mbps	R 900	R 450	-R 450	-50%
400/400Mbps	R 1 025	R 515	-R 510	-49.8%
500/500Mbps	R 1 250	R 625	-R 625	-50%
1000/500Mbps	R 1 450	R 725	-R 725	-50%

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the largest tariff discount in absolute value terms occurred on the ASAP Internet on MetroFibre Internet 1000/500Mbps package, which was reduced by R 725 from R 1450 to R 725.

The ASAP Internet on MetroFibre Internet Promotion was launched on 01 July 2023 and made available until 31 December 2023.

2.7.3.4. Cybersmart on Lightspeed FTTH Promotion

Cybersmart filed its Lightspeed FTTH Promotion with the Authority on 22 June 2023. This promotion entails free installation for the initial 6 months and two FTTH

line speed packages which is priced at R 399 and R 599. Table 110 below details the Cybersmart on Lightspeed FTTH Promotion.

Table 110: Cybersmart on Lightspeed FTTH Promotion

Initial 6 Months:	
Free installation	
After initial 6 months:	
Product Description	**Price (Incl. VAT)**
100Mbps	R 399
500Mbps	R 599

Source: ICASA Database based on Tariff Notifications

The Cybersmart on Lightspeed FTTH Promotion was launched on 15 July 2023 and it will end on 15 October 2023.

2.7.3.5. ASAP Internet on Vumatel FTTH Promotion

ASAP Internet filed its Vumatel FTTH Promotion with the Authority on 26 June 2023, which entails discounted FTTH packages with line speeds ranging from 50/50Mbps to 1000/500Mbps. Table 111 below details the ASAP on Vumatel FTTH Promotion.

Table 111: ASAP Internet on Vumatel FTTH Promotion

Product Description	Standard Price	Promotional Price	Difference	Variance (%)
50/50Mbps	R 690	R 345	-R 345	-50%
100/100Mbps	R 865	R 430	-R 435	-50.3%
200/200Mbps	R 995	R 495	-R 500	-50.3%
500/200Mbps	R 1 140	R 570	-R 570	-50%
1000/200Mbps	R 1 420	R 710	-R 710	-50%
1000/500Mbps	R 2 250	R 1 125	-R 1 125	-50%

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the largest discount in absolute terms of R 1 125 occurred on the ASAP Internet on Vumatel 1000/500Mbps which was discounted from R 2 250 to R 1 125.

The ASAP Internet on Vumatel FTTH Promotion was launched on 07 July 2023 and will be available until 31 December 2023.

2.7.3.6. Vodacom Fibre Broadband Promotion on Octotel

Vodacom filed its Fibre Broadband Promotion on Octotel plan with the Authority on 27 June 2023 wherein it offers discounted subscription fees on selected fibre packages to customers subscribing to a 12-month and/or 24-month contractual period, as shown in table 112 below.

Table 112: Fibre Broadband Promotion on Octotel

Line Speed (Mbps)	Monthly Subscription	Promotional Subscription for first 2/4 Months	Price Difference	Variance (%)
25/25	R 599	R 599	R 0	0%
50/50	R 749	R 599	-R 150	-20%
100/100	R 999	R 699	-R 300	-30%
200/200	R 1 059	R 799	-R 260	-24.6%
400/200	R 1 099	R 1 099	R 0	0%

Source: ICASA Database based on Tariff Notifications

As shown in the table above, the discounts range from R 150 to R 300 in absolute value terms and average 25%. The promotion is applicable on the first 2 months for the 12-month contract and applicable on the first 4 months for the 24-month contract, thereafter Vodacom charges the standard subscription fee applicable to the package. For example, customers subscribing on the 50/50Mbps package for 24 months are charged a promotional subscription fee of R 599 for the first four months, thereafter, a standard subscription fee of R 749 is charged for the remaining 20 months.

Vodacom's Fibre Broadband on Octotel was introduced in the market on 06 July 2023 and will run until 30 November 2023.

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

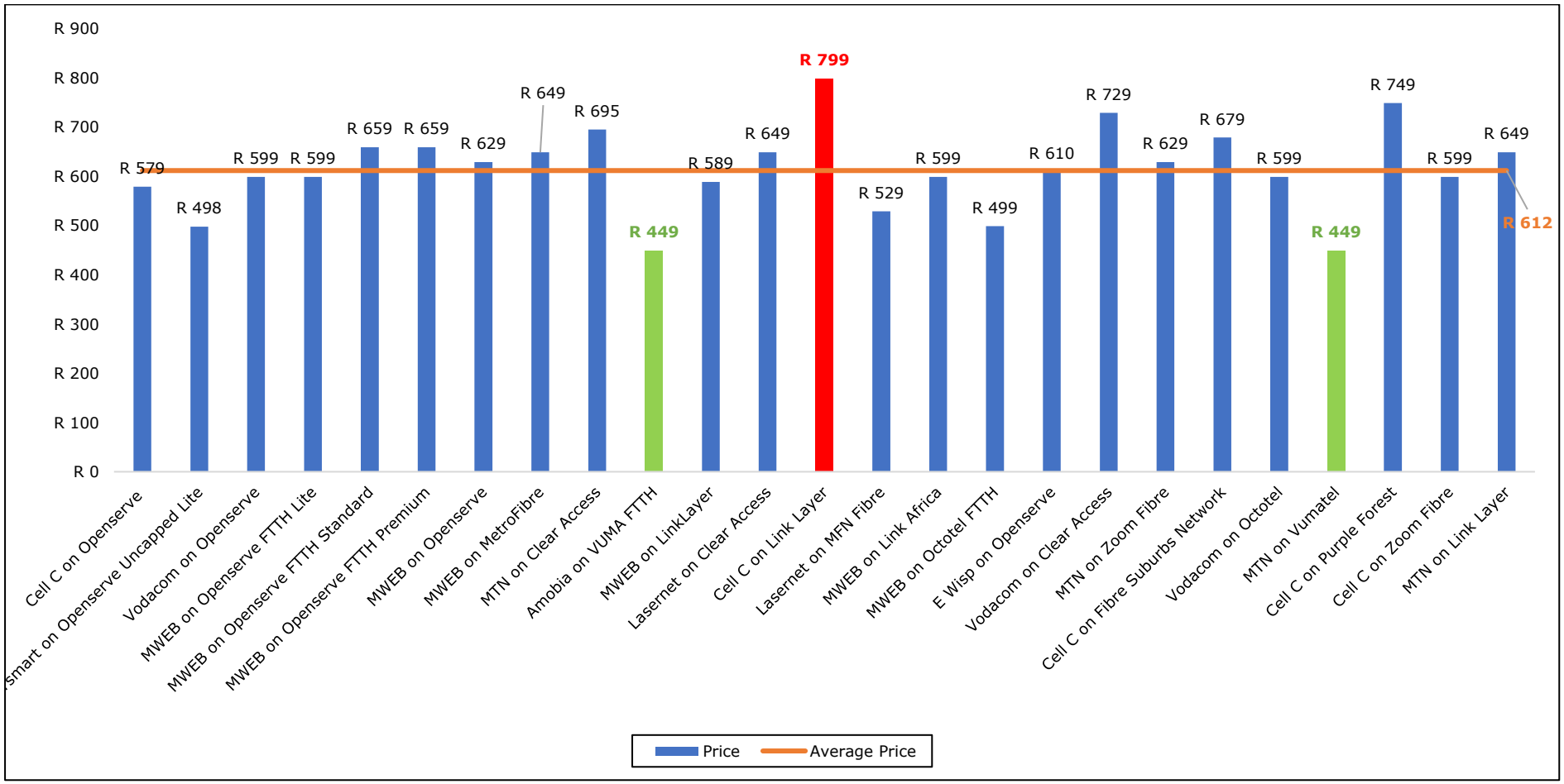
- The average price of the sampled 20/20Mbps line speeds remains at R 704 per month, as analysed in the 2022/23FY Q4 Bi-annual Report[58].

2.7.4.2. 25/25Mbps FTTH on Various Networks

- Figure 5 below shows that the sample approximates the average subscription fee of the 25/25Mbps line speed at R 612, which is down by R 7 or 1.1% from R 619 in the previous reporting period. The reduction in the average subscription fee is due to the addition of new fibre packages that are priced below the average subscription fee in the previous reporting period. For example, MTN and Vodacom introduced their 25/25Mbps packages on Vumatel and Octotel that are priced at R 449 and R 599, respectively.

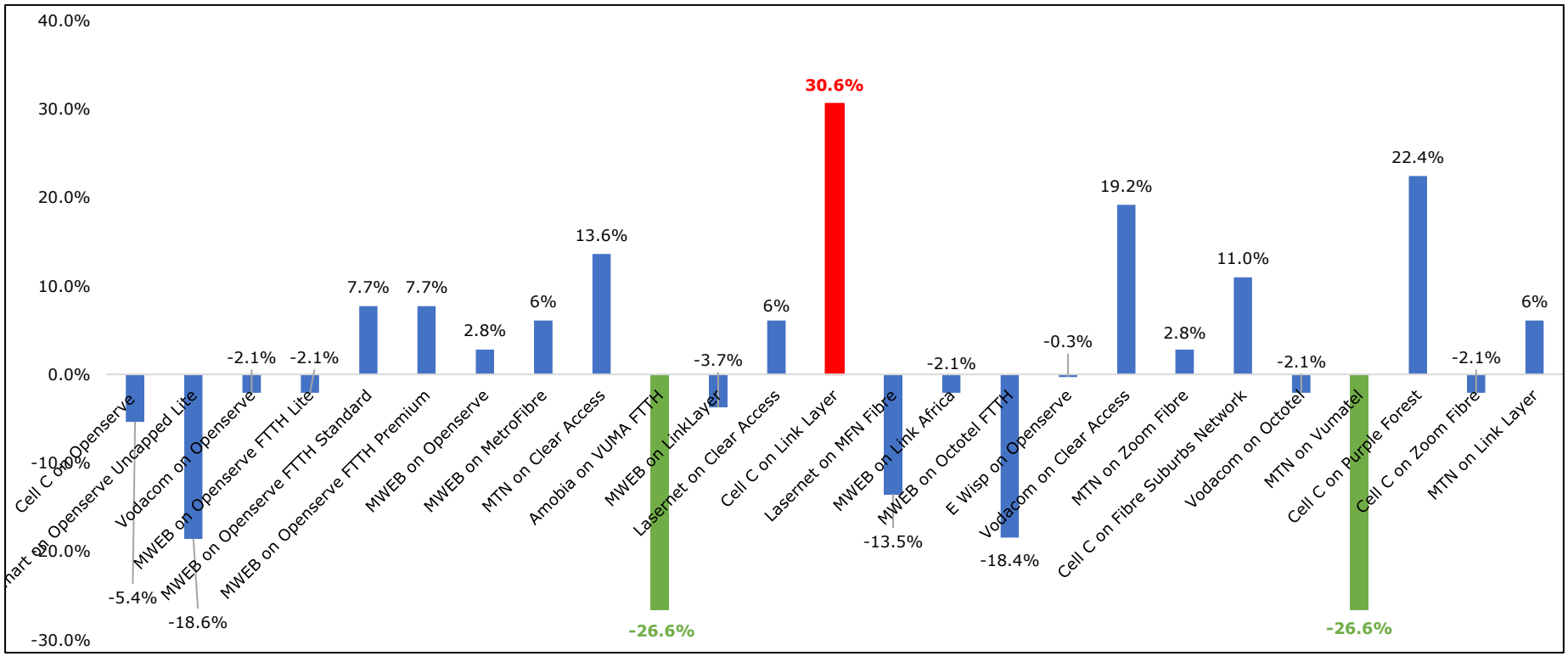
[58] Pages 86 - 89, available online at: < https://www.icasa.org.za/legislation-and-regulations/bi-annual-tariffs-analysis-report-q4-2022-23 > Accessed on 08 August 2023.

Figure 5: 25/25Mbps Packages offered by 3rd party FNOs on Various Networks



Source: ICASA Database Based on Tariff Notifications

Figure 6: Percentage Deviation from the 25/25Mbps Average Price



Source: ICASA Database Based on Tariff Notifications

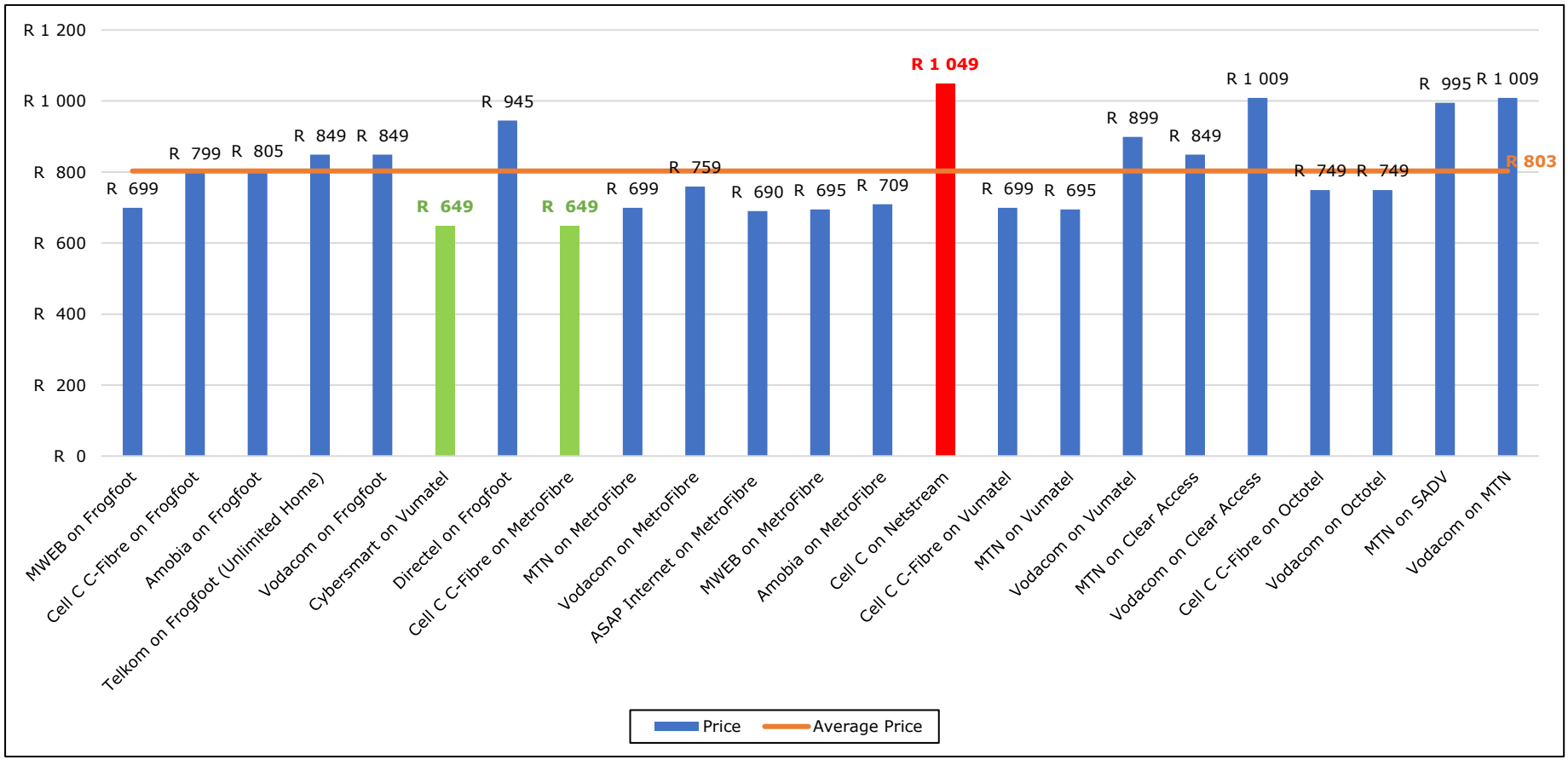
- It should be noted that 25 of the 27 sampled fibre packages are shown in the graphs above (figures 5 and 6) to avoid plotting a clustered graph.
- MTN and Amobia's 25/25Mbps FTTH on the Vumatel network have the lowest subscription fee of R 449 which translates to the largest below average price deviation of 26.6%.

- Cell C's 25/25Mbps package on Link Layer has the highest subscription fee of R 799, which translates to the largest deviation above the average price of 30.6%.
- It is worth noting that 14 of the 27 sampled (52%) fibre packages charge an amount below the average subscription fee.
- It is also worth noting that 26 of the 27 sampled (96%) fibre packages are priced at an amount below the average subscription fee of the 20/20Mbps packages (i.e., R 704), which means these are more affordable while offering a high line speed (i.e., 25/25Mbps).

2.7.4.3. 50/50Mbps FTTH on Various Networks

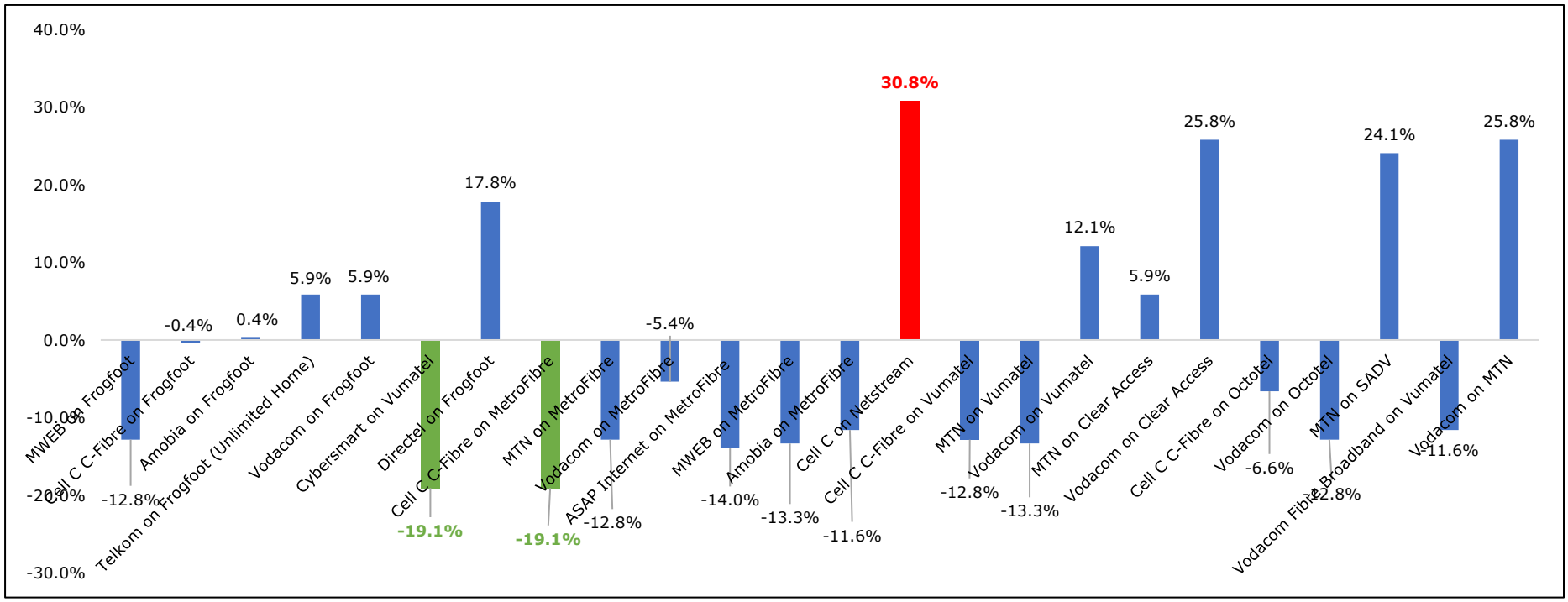
- Figure 7 below shows that the sample approximates the average subscription fee of the 50/50Mbps line speed at R 803 per month. The average subscription fee increased by R 3 from R 800 in the previous reporting period. The increase in the average price can be explained by changes in subscription fees of selected fibre packages, and an introduction of new fibre packages in the sample. For example, Vodacom's 50/50Mbps on Octotel was increased from R 699 to R 749 per month. On the other hand, Vodacom's 50/50Mbps on Vumatel was introduced at R 709 per month, which is below the average price.

Figure 7: 50/50Mbps Packages offered on Various Fibre Networks



Source: ICASA Database Based on Tariff Notifications

Figure 8: Percentage Deviation from the 50/50Mbps Average Price



Source: ICASA Database Based on Tariff Notifications

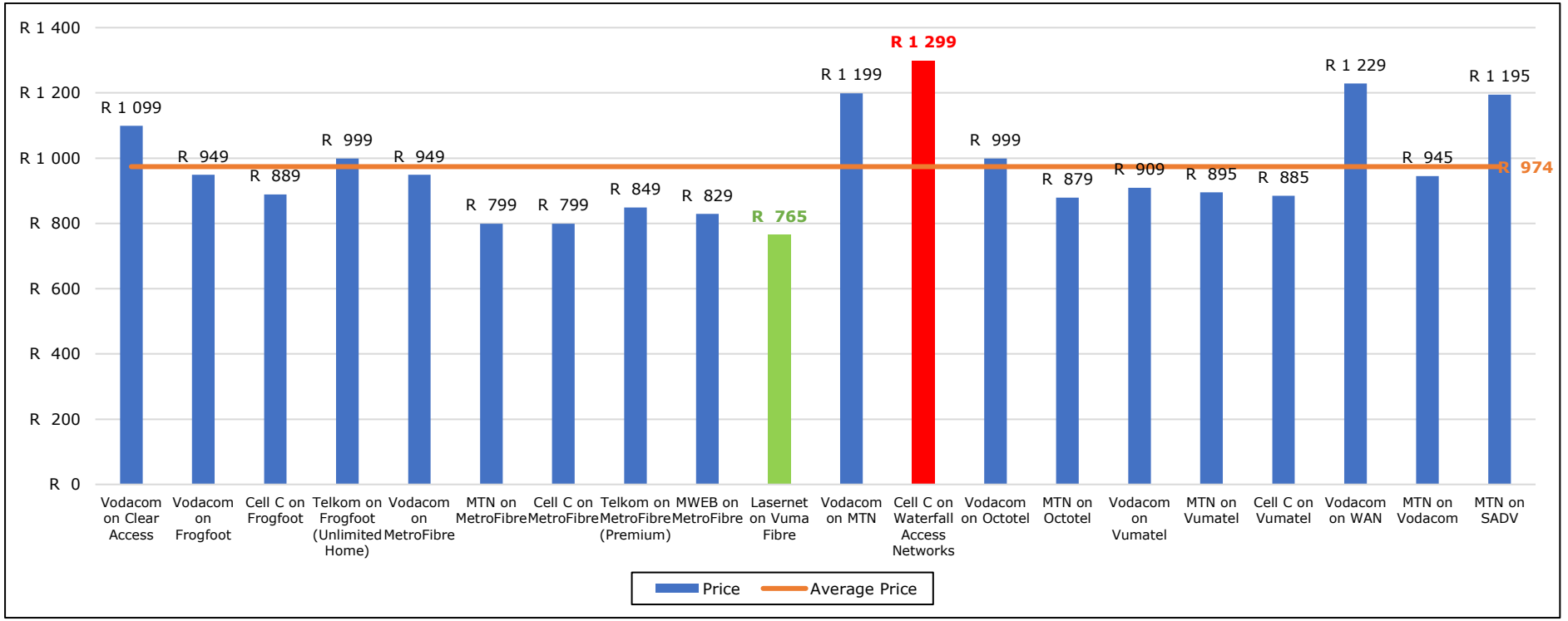
- It should be noted that 25 of the 58 sampled fibre packages are shown in the graph to avoid plotting a clustered graph.
- The lowest subscription fee on the sampled 50/50Mbps fibre packages are offered by Cell C (on MetroFibre) and Cybersmart (on Vumatel), both at R 649 per month, which is 19.1% below the estimated average price.
- Cell C's 50/50Mbps FTTH on the Netstream network remains the highest subscription fee in the sample at R 1 049 per month, which translates to the largest deviation of 30.8% above the average price.

- It is worth noting that 35 out of the 58 sampled packages (60%) are priced below the average subscription fee.

2.7.4.4. 100/100Mbps FTTH on Various Networks

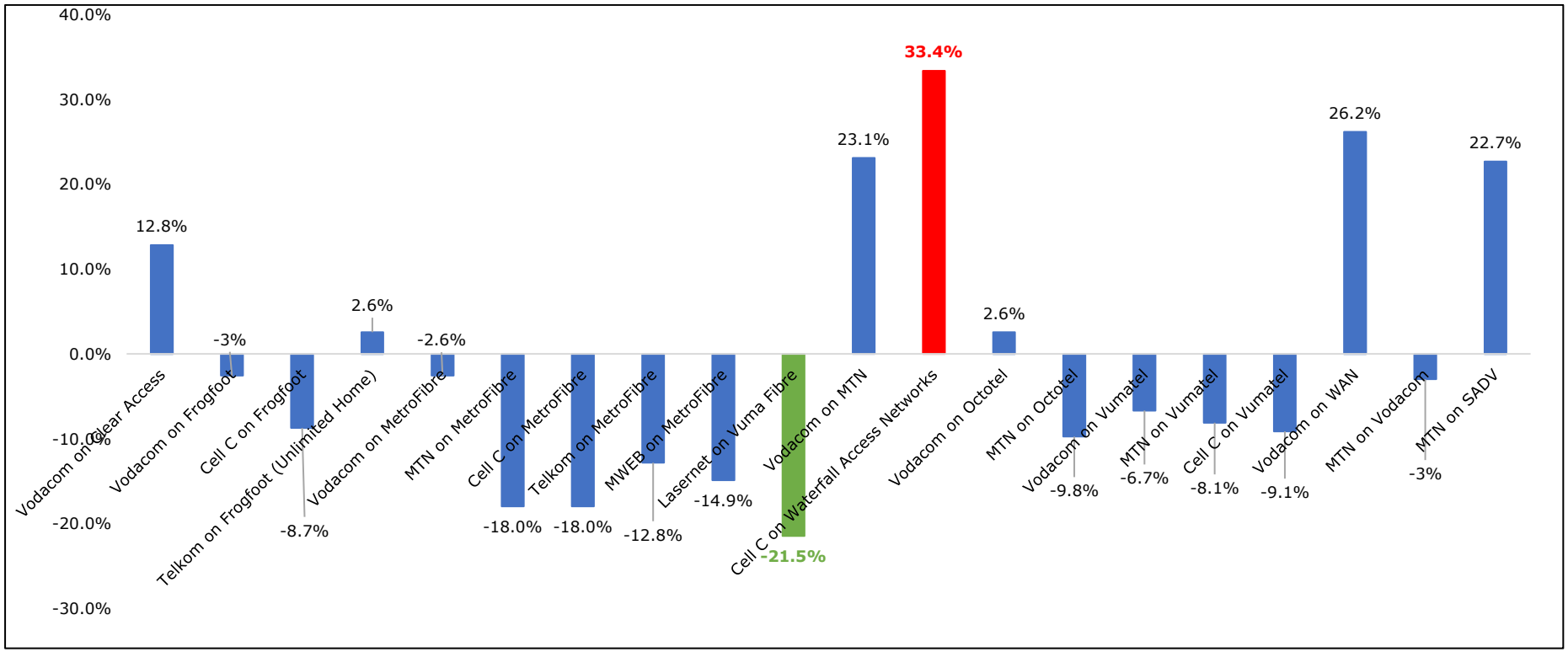
- Figure 9 below depicts that the sample approximates the average subscription fee of the 100/100Mbps line speed at R 974 per month, which was reduced by R 4 or 0.4% from R 978 in previous reporting period. The change of the average subscription fee is as a result of the additional 100/100Mbps packages in the sample, and price changes for selected fibre packages pre-existing in the sample. For example, MTN's 100/100Mbps package on Octotel's network realised a R 220 or 20% price decrease from R 1 099 to R 879. On the other hand, Cell C's 100/100Mbps on Link Layer was introduced at R 1 049 per month, which is above the average price.

Figure 9: 100/100Mbps Packages offered by 3rd party FNOs on Various Networks



Source: ICASA Database Based on Tariff Notifications

Figure 10: Percentage Deviation from the 100/100Mbps Average Price



Source: ICASA Database Based on Tariff Notifications

- The number of fibre packages plotted was limited to 20 out of the 53 sampled to avoid a clustered figure.
- Cell C's 100/100Mbps FTTH on Waterfall Access Networks (WAN) remains the highest subscription fee of R 1 299 which translates to the largest deviation from the average price of 33.4%.

- Lasernet has the lowest subscription fee on its 100/100Mbps package on the Vumatel network at R 765, which is 21.5% less than the average price.
- It is worth noting that 32 out of the 53 sampled packages (60%) are priced at an amount less than the average price.

3. Conclusion

The Authority observed the continued competitiveness between licensees in terms of the number of notifications received from licensees in the period under review with a total of 335 notifications, which is marginally down by 6 notifications from the previous reporting period. The operators filed 45 new products, 84 promotions and 55 extensions to promotional offers (a total of 184), which is indicative of the operators' efforts to increase product variety and/or customer choice in the telecommunications market and incentivise, reward (loyal customers) and attract new customers by providing more affordable access to communication services.

The Authority continues to observe data price adjustments with various amendments filed by licensees. In the period under review, MTN reduced its 30-day standard prepaid 500MB and 1GB data bundles by 5.8% and 7.1% to R 65 and R 79, respectively. For instance, this is also reflected on the slight decrease in the average price of the 30-day standard prepaid 1GB data bundle from R 83.50 to R 82. The R 6 decrease in MTN's 1GB data bundle is indicative of the operator's efforts to remain competitive in the market and efforts to offer more affordable communication services to the public. On the other hand, Telkom Mobile increased 30-day standard prepaid data bundles from 2GB to 100GB by an average of 5%. Other positive amendments in the data services market include the increase in the data volume of the 30-day standard prepaid 100MB data bundle to 120MB while the price remained unchanged at R 20, and the price reduction of MTN's weekly 1GB data bundle by R 5 or 7.1% from R 70 to R 65.

In the voice services market, the Authority received seven prepaid tariff plan notifications from various licensees regarding prepaid price plans. For example, on 14 March 2023, Vodacom filed its new Khosi Bonus Price Plan wherein it charges customers R 1.55 per minute, R 0.52 per SMS, and R 0.49 per MB of OOB rates. Telkom Mobile also filed an amendment to its prepaid price plans wherein it increased the OOB voice rates. For example, Telkom Mobile's Thola More off-net and on-net OOB voice rates were increased by 8.7% and 16.7% to R 0.75 and R 0.35 per minute, respectively. MTN also increased the OOB voice rate of its Bonus Bonanza price plan by 51.5 % or R 0.51 from R 0.99 to R 1.50 per minute.

The increase in the OOB voice rates may result in customers' utilisation of OOB voice calls becoming less desirable.

The Authority also observed a continued competitiveness in the provision of LTE and Wireless Internet services, the introduction of 5G products and wireless fibre Internet services, with 26 notifications received in the period under review. For instance, MTN introduced its new Super Data Price Plan, wherein it offers affordable 30-day mobile broadband data bundles, with its 30GB Anytime data bundle priced at R 199. The wireless Internet services may also serve as an alternative to fixed broadband services, especially in areas where there is no fibre footprint.

FNOs and ISPs continue to amend and/or introduce new fibre services in the market which the Authority deem as beneficial to the public in terms of increased product choice and may ultimately result in competitive pricing. For example, MTN and Vodacom introduced their 25/25Mbps packages on Vumatel and Octotel that are priced at R 449 and R 599, respectively, which are below the average subscription fee of R 612. It should be noted that the Authority received a total of 133 notifications regarding fibre services (up from 115 in the preceding reporting period) from various FNOs and/or ISPs in the period under review.

The FTTx comparative analysis shows that the average prices for the 20/20Mbps, 25/25Mbps, 50/50Mbps and 100/100Mbps are approximately, R 704, R 612, R 803 and R 974, respectively. The subscription fee differential of the R 92 or 15% between the 20/20Mbps and 25/25Mbps line speeds can be attributed to a significant number of line speed upgrades by operators at no additional costs, line speed upgrades accompanied by price reductions, and an introduction of new packages which are priced lower than the 20/20Mbps average subscription fee.

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

4. References

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< https://www.icasa.org.za/legislation-and-regulations/third-amendment-to-the-standard-terms-and-conditions-regulations-for-individual-licences-2010 >

Annexure A: List of Other[59] Tariff Notifications Filed During the Period Under Review

TARIFF PLAN	EXPLANATION OF THE TARIFF PLAN	RELEVANT DATES	PRICING/PRODUCT/PACKAGE INFORMATION	STATUS
Cell C Home Connecta Flexi Promotion	Cell C's Home Connecta Flexi Promotion offers customers prepaid and TopUp anytime and night data depending on the customer's general spend.	Filed: 26 March 2021 Launch Date: 27 March 2021 Amendment: 24 February 2023, 08 June 2023 Extension Date(s): 25 July 2023 Expected Decommission Date: 31 October 2023	Cell C's Home Connecta Flexi 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 > The promotion was first extended on 08 March 2022 and has been extended six times, with the latest extension being filed with the Authority on 25 July 2023.	Ongoing as at 30 June 2023 and was expected to be decommissioned on 31 July 2023. However, Cell C filed another extension on 25 July 2023, extending the promotion to 31 October 2023, which will be discussed in the next reporting period.

[59] Other tariff notifications filed or received during the period under review that were in existence as at end of 30 June 2023 which were not discussed/mentioned in the main part of this report.

<table>
<tr>
<td>Cell C WhatsApp Recharge Channel 7-day 1GB Data Bundle Promotion</td>
<td>Cell C's WhatsApp Recharge Channel 7-day 1GB Data Bundle Promotion gave customers a 1GB 30-day data bundle, if they recharged by for 1GB or more for the first time on the WhatsApp Recharge Channel.</td>
<td>Filed: 03 March 2022

Launch Date: 31 March 2022

Extension Date(s): 18 January 2023, 25 July 2023

Decommission Date: 31 October 2023</td>
<td>Table 113: Cell C WhatsApp Recharge Channel 7-Day 1GB Data Bundle Promotion

<table>
<tr><th>Product Description</th><th>Price</th><th>Validity</th></tr>
<tr><td>1GB</td><td>R 0</td><td>7 Days</td></tr>
</table>
Source: ICASA Database Based on Tariff Notifications</td>
<td>Ongoing as at 30 June 2023 and was expected to be decommissioned on 31 July 2023. However, Cell C filed another extension on 25 July 2023, extending the promotion to 31 October 2023, which will be discussed in the next reporting period.</td>
</tr>
<tr>
<td>Cell C PEP Starter Pack Prepaid Promotional Plan</td>
<td>Cell C PEP Starter Pack Prepaid Promotional Plan rewards customers with anytime data, on-net voice minutes and WhatsApp data with every recharge of R 15 or more.</td>
<td>Filed: 06 July 2022

Launch Date: 20 July 2022

Extension Date: 18 January 2023, 20 April 2023</td>
<td>Table 114: Cell C PEP Starter Pack Prepaid Promotional Plan

<table>
<tr><th colspan="5">PEP Starter Pack Prepaid Promotional Tariff Plan Rates</th></tr>
<tr><td colspan="3">Data</td><td colspan="2">R 0.40 (per MB)</td></tr>
<tr><td colspan="3">Voice calls (to any local network at any time)</td><td colspan="2">R 1.50 (per minute)</td></tr>
<tr><td colspan="3">SMS (to any local network at any time)</td><td colspan="2">R 0.50</td></tr>
<tr><td colspan="3">MMS</td><td colspan="2">R 0.50</td></tr>
<tr><td colspan="3">International SMS</td><td colspan="2">R 1.74</td></tr>
<tr><th colspan="2">Recharge bands</th><th>Reward</th><th>On-net (Minutes)</th><th>Validity</th></tr>
<tr><td>R 5</td><td>R 14.99</td><td>30MB</td><td>30</td><td>3 Days</td></tr>
<tr><td>R 15</td><td>R 34.99</td><td>120MB</td><td>300</td><td>3 Days</td></tr>
<tr><td>R 35</td><td>R 49.99</td><td>300MB</td><td>600</td><td>3 Days</td></tr>
</table></td>
<td>Ongoing as at 30 June 2023, however it was decommissioned on 31 July 2023.</td>
</tr>
</table>

<table>
<tr>
<td></td>
<td></td>
<td>Expected Decommission Date: 31 July 2023</td>
<td>
<table>
<tr><td>R 50</td><td>R 149.99</td><td>1024MB</td><td>900</td><td>7 Days</td></tr>
<tr><td>R 150</td><td>R 399.99</td><td>2048MB</td><td>900</td><td>7 Days</td></tr>
<tr><td>R 400</td><td>R 699.99</td><td>2048MB</td><td>900</td><td>7 Days</td></tr>
<tr><td>R 700</td><td>R 999.99</td><td>2048MB</td><td>900</td><td>7 Days</td></tr>
<tr><td colspan="2">R 1 000</td><td>2048MB</td><td>900</td><td>7 Days</td></tr>
</table>
Source: ICASA Database Based on Tariff Notifications
</td>
<td></td>
</tr>
<tr>
<td>Cell C Day-by-Day Night Data Bundle Promotion</td>
<td>Cell C’s Day-by-Day Night Data Bundle Promotion entails a 7-Day night data bundle and three 30-day night data bundles with data packages ranging from 7 168MB to 30 720MB.</td>
<td>Filed: 01 March 2022

Launch Date: 11 March 2022

Extension Dates: 20 April 2023

Expected Decommission Date: 31 July 2023</td>
<td>Cell C’s Day-by-Day Night Data Bundle was analysed in the 2022/23 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-q4-2022-23 >

The promotion was first extended on 01 June 2022 and has been extended four times, with the latest extension being filed with the Authority on 20 April 2023.</td>
<td>Ongoing as at 30 June 2023, however it was decommissioned on 31 July 2023.</td>
</tr>
<tr>
<td>Cell C All-in-One Plus with Facebook & Video</td>
<td>Cell C All-in-One Plus with Facebook & Video Streaming Promotion entails integrated voice,</td>
<td>Filed: 14 July 2022

Launch Date: 26 July 2022</td>
<td>Cell C’s All-in-One Plus with Facebook & Video Streaming Promotion was analysed in the 2022/23 FY Q4 Bi-annual Tariff Analysis Report which can be found on the Authority’s website on the link below:</td>
<td>Ongoing as at 30 June 2023 and was expected to be decommissioned on 31 July 2023.</td>
</tr>
</table>

Streaming Promotion	data, Facebook and streaming data.	Extension Dates: 25 July 2023 Expected Decommission Date: 31 October 2023	< https://www.icasa.org.za/legislation-and-regulations/bi-annual-tariffs-analysis-report-q4-2022-23 > The promotion was first extended on 17 October 2022 and has been extended four times, with the latest extension being filed with the Authority on 25 July 2023.	However, Cell C filed another extension on 25 July 2023, extending the promotion to 31 October 2023, which will be discussed in the next reporting period.
Cell C All-in-One Bonus Nite Data Promotion	Cell C's All-in-One Bonus Nite Data Promotion allocates bonus Nite data enabling access to social media platforms to customers who purchase a qualifying All-in-One bundle.	Filed: 20 August 2021 Launch Date: 27 August 2021 Extension Dates: 25 July 2023 Expected Decommission Date: 31 October 2023	Cell C All-in-One Bonus Nite Data Promotion was analysed in the 2021/22 FY Q4 Bi-annual Tariff Analysis Report which can be found on the Authority's website on the link below: < Tariffs Analysis Report: 01 Jul to 31 Dec 2021 — Independent Communications Authority of South Africa (icasa.org.za) > The promotion was first extended on 19 July 2022 and has been extended five times, with the latest extension being filed with the Authority on 25 July 2023.	Ongoing as at 30 June 2023 and was expected to be decommissioned on 31 July 2023. However, Cell C filed another extension on 25 July 2023, extending the promotion to 31 October 2023, which will be discussed in the next reporting period.

Cell C 7-Day WhatsApp Boost Bundle Promotion	The Cell C 7-Day WhatsApp Boost Bundle Promotion was made available to customers who purchase base (standard) daily, 7-day or monthly data bundles.	Filed: 21 July 2020 Launch Date: 31 July 2020 Extension Dates: 25 July 2023 Expected Decommission Date: 31 October 2023	Cell C's 7-Day WhatsApp Boost Bundle Promotion was analysed in the 2020/21 FY Q4 Bi-annual Tariff Analysis Report which can be found on the Authority's website on the link below: < *https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jul-30-dec-2020* > The promotion was first extended on 18 January 2022 and has been extended seven times, with the latest extension being filed with the Authority on 25 July 2023.	Ongoing as at 30 June 2023 and was expected to be decommissioned on 31 July 2023. However, Cell C filed another extension on 25 July 2023, extending the promotion to 31 October 2023, which will be discussed in the next reporting period.
Cell C 100GB and 200GB for 6 Months Promotion	The Cell C 100GB and 200GB for 6 Months Promotion allocates prepaid, post-paid and top-up customers additional Nite data over and above the 100GB or 200GB anytime data purchased.	Filed: 04 March 2021 Launch Date: 05 March 2021 Extension Date(s): 25 July 2023	Cell C's 100GB and 200GB for 6 Months 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 30 June 2023 and was expected to be decommissioned on 31 July 2023. However, Cell C filed another extension on 25 July 2023, extending the promotion to 31

		Expected Decommission Date: 31 October 2023	The promotion was first extended on 18 January 2022 and has been extended seven times, with the latest extension being filed with the Authority on 25 July 2023.	October 2023, 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 days) for a monetary value of R 500.	Filed: 23 November 2020 Launch Date: 27 November 2020 Extension Dates: 25 July 2023 Expected Decommission Date: 31 October 2023	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 > The promotion was first extended on 18 January 2022 and has been extended seven times, with the latest extension being filed with the Authority on 25 July 2023.	Ongoing as at 30 June 2023 and was expected to be decommissioned on 31 July 2023. However, Cell C filed another extension on 25 July 2023, extending the promotion to 31 October 2023, which will be discussed in the next reporting period.
Cell C WhatsApp Boost Promotion	The Cell C WhatsApp Boost Promotion offers customers who purchase base (standard) daily, 5-	Filed: 07 November 2019	Cell C's WhatsApp Boost 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 30 June 2023, however it was decommissioned on 31 July 2023. .

	day or monthly data bundles.	Launch Date: 19 November 2019 Extension Dates: 20 April 2023 Expected Decommission Date: 31 July 2023	The promotion was first extended on 18 January 2022 and has been extended six times, with the latest extension being filed with the Authority on 20 April 2023.	
Cell C Daily Data bundles and Nite Data Bundles Promotion	Cell C's Daily Data bundles and Nite Data Bundles Promotion entail a 2GB data bundle which is priced at R 35 and valid until midnight on day of purchase.	Filed: 20 January 2022 Launch Date: 21 January 2022 Extension Dates: 25 July 2023 Expected Decommission	The 2GB data bundle was made available to customers that purchase the 1GB daily bundle at R 20. The promotion was first extended on 18 January 2022 and has been extended six times, with the latest extension being filed with the Authority on 25 July 2023.	Ongoing as at 30 June 2023 and was expected to be decommissioned on 31 July 2023. However, Cell C filed another extension on 25 July 2023, extending the promotion to 31 October 2023, which will be discussed in the

<table>
<tr><td></td><td></td><td>Date: 31 October 2023</td><td></td><td>next reporting period.</td></tr>
<tr><td>Cell C Load Shedding Free Streaming and Social Bundles Promotion</td><td>Cell C's Loadshedding Free Streaming and Social Bundles Promotion entails promotional data packages ranging from 100MB to 1GB with 1 and 2-day validity periods.</td><td>Filed: 19 July 2022

Launch Date: 29 July 2022

Extension Dates: 19 January 2023, 20 April 2023, 25 July 2023

Expected Decommission Date: 31 October 2023</td><td>Table 115: Cell C Loadshedding Free Streaming and Social Bundles Promotion
<table><tr><th colspan="3">Daily Video Streaming Promotional Data</th></tr><tr><th>Product Description</th><th>Validity</th><th>Price</th></tr><tr><td>100MB</td><td>Mid-night</td><td>R 0</td></tr><tr><td>350MB</td><td>Mid-night</td><td>R 0</td></tr><tr><td>500MB</td><td>Mid-night</td><td>R 0</td></tr><tr><th colspan="3">Two Days Video Streaming Promotional Data</th></tr><tr><td>100MB</td><td>2 Days</td><td>R 0</td></tr><tr><td>200MB</td><td>2 Days</td><td>R 0</td></tr><tr><td>500MB</td><td>2 Days</td><td>R 0</td></tr><tr><td>1GB</td><td>2 Days</td><td>R 0</td></tr><tr><th colspan="3">Daily Social Promotional Data</th></tr><tr><td>100MB</td><td>Mid-night</td><td>R 0</td></tr><tr><td>350MB</td><td>Mid-night</td><td>R 0</td></tr><tr><td>500MB</td><td>Mid-night</td><td>R 0</td></tr><tr><th colspan="3">Two Days Social Promotional Data</th></tr><tr><td>100MB</td><td>2 Days</td><td>R 0</td></tr><tr><td>200MB</td><td>2 Days</td><td>R 0</td></tr><tr><td>500MB</td><td>2 Days</td><td>R 0</td></tr><tr><td>1GB</td><td>2 Days</td><td>R 0</td></tr></table>Source: ICASA Database based on Tariff Notifications</td><td>Ongoing as at 30 June 2023 and was expected to be decommissioned on 31 July 2023. However, Cell C filed another extension on 25 July 2023, extending the promotion to 31 October 2023, which will be discussed in the next reporting period.</td></tr>
<tr><td>Cell C University Student</td><td>Cell C's University Student Data Bundles Promotion</td><td>Filed: 20 July 2022</td><td>Table 116: Cell C University Student Data Bundles Promotion
<table><tr><th>Offer 1 - Students</th></tr></table></td><td>Ongoing as at 30 June 2023 and was expected to be</td></tr>
</table>

<table>
<tr>
<td>Data Bundles Promotion</td>
<td>entails anytime and nite data bundles for university students.</td>
<td>Launch Date: 01 August 2022

Extension Dates: 19 January 2023, 25 July 2023

Expected Decommission Date: 31 October 2023</td>
<td>
<table>
<tr><td>Anytime data</td><td>5GB</td></tr>
<tr><td>Nite data</td><td>10GB</td></tr>
<tr><td>Promotional Data</td><td>5GB</td></tr>
<tr><td>Price (Incl. VAT)</td><td>65</td></tr>
<tr><td>Validity</td><td>30 Days</td></tr>
</table>
Source: ICASA Database based on Tariff Notifications
</td>
<td>decommissioned on 31 July 2023. However, Cell C filed another extension on 25 July 2023, extending the promotion to 31 October 2023, which will be discussed in the next reporting period.</td>
</tr>
<tr>
<td>Cell C Home Connecta Fibre Promotion</td>
<td>Cell C’s Home Connecta Fibre Promotion entails FTTH packages on various networks with line speeds ranging from 50/25Mbps to 150/150Mbps.</td>
<td>Filed: 22 March 2023

Launch Date: 01 April 2023

Expected Decommission Date: 31 July 2023</td>
<td>
Table 117:Cell C Home Connecta Fibre Promotion
<table>
<tr><th>Product Description</th><th>Standard Price (Incl. VAT)</th><th>Promotional Price (Incl. VAT)</th><th>Difference</th><th>Variance (%)</th></tr>
<tr><td colspan="5">Vumatel</td></tr>
<tr><td>C Fibre 50Mbps/50Mbps</td><td>R 699</td><td>R 19</td><td>-R 680</td><td>-97.3%</td></tr>
<tr><td colspan="5">Openserve</td></tr>
<tr><td>C Fibre 40Mbps/20Mbps</td><td>R 599</td><td>R 19</td><td>-R 580</td><td>-96.8%</td></tr>
<tr><td colspan="5">Frogfoot</td></tr>
<tr><td>C Fibre 40Mbps/10Mbps</td><td>R 619</td><td>R 19</td><td>-R 600</td><td>-96.9%</td></tr>
<tr><td colspan="5">MetroFibre Networx</td></tr>
<tr><td>C Fibre 20Mbps/20Mbps</td><td>R 499</td><td>R 19</td><td>-R 480</td><td>-96.2%</td></tr>
<tr><td colspan="5">Octotel</td></tr>
</table>
</td>
<td>Ongoing as at 30 June 2023, however it was decommissioned on 31 July 2023.</td>
</tr>
</table>

			C Fibre 10Mbps/5Mbps	R 359	R 19	-R 340	-94.7%	
			FibreSuburb Networks					
			C Fibre 25Mbps/25Mbps	R 679	R 19	-R 660	-97.2%	
			Purple Forest					
			C Fibre 10Mbps/10Mbps	R 599	R 19	-R 580	-96.8%	
			Waterfall Access Network Networks					
			C Fibre 10Mbps/10Mbps	R 599	R 19	-R 580	-96.8%	
			Netstream					
			C Fibre 10Mbps/10Mbps	R 749	R 19	-R 730	-97.5%	
			Mitsol					
			C Fibre 10Mbps/10Mbps	R 659	R 19	-R 640	-97.1%	
			Link Layer					
			C Fibre 25Mbps/25Mbps	R 799	R 19	-R 780	-97.6%	
			Zoom					
			C Fibre 10Mbps/10Mbps	R 409	R 19	-R 390	-95.4%	
			Source: ICASA Database based on Tariff Notifications					
Cell C Discounted Bundles Promotion	Cell C's Discounted Bundles Promotion entailed discounted data, voice and social media bundles with	Filed: 07 October 2022	*Table 118: Cell C Discounted Bundles Promotion*					Ongoing as at 30 June 2023 and was expected to be decommissioned on 31 July 2023.

Product Description	Validity	Data Base Price	Promotional Price	Difference	Variance (%)
50MB - 10% OFF!	1 Day	R 7	R 6.30	-R 0.70	-10%

	discounts ranging from 10% to 55%.	Launch Date: 18 October 2022 Extension Date: 19 January 2023, 25 July 2023 Decommission Date: 31 October 2023	150MB - 10% OFF!	7 Days	R 17	R 15.30	-R 1.70	-10%	However, Cell C filed another extension on 25 July 2023, extending the promotion to 31 October 2023, which will be discussed in the next reporting period.
			100MB - 25% OFF!	3 Days	R 12	R 9	-R 3	-25%	
			Voice						
			60min Voice On Net valid for 1 hour at R5.00	1 Hour	R 5	R 2.50	-R 2.50	-50%	
			60min Voice On Net - 10% OFF!	1 Day	R 6	R 5.40	-R 0.60	-10%	
			15min Voice Any Net - 15% OFF!	7 Days	R 8.50	R 7.23	-R 1.28	-15%	
			WhatsApp						
			250MB WhatsApp - 20% OFF!	1 Day	R 4	R 3.20	-R 0.80	-20%	
			300MB WhatsApp - 20% OFF!	3 Days	R 8	R 6.40	-R 1.60	-20%	
			500MB WhatsApp - 50% OFF!	7 Days	R 7.50	R 3.75	-R 3.75	-50%	
			Instagram						
			100MB Instagram - 20% OFF!	1 Day	R 4	R 3.20	-R 0.80	-20%	
			750MB Instagram - 50% OFF!	7 Days	R 15	R 7.50	-R 7.50	-50%	
			1GB Instagram - 55% OFF!	30 Days	R 20	R 9	-R 11	-55%	
			Tik Tok						
			100MB Tik Tok - 20% OFF!	1 Day	R 4	R 3.20	-R 0.80	-20%	
			750MB Tik Tok - 50% OFF!	7 Days	R 15	R 7.50	-R 7.50	-50%	
			1GB Tik Tok - 55% OFF!	30 Days	R 20	R 9	-R 11	-55%	
			YouTube						
			100MB YouTube - 20% OFF!	1 Day	R 4	R 3.20	-R 0.80	-20%	
			750MB YouTube - 50% OFF!	7 Days	R 15	R 7.50	-R 7.50	-50%	
			1GB YouTube - 55% OFF!	30 Days	R 20	R 9	-R 11	-55%	
			Source: ICASA Database based on Tariff Notifications						

Cell C Byond Tariff Plan	Cell C Byond Tariff Plan entails an integrated plan offering out of bundle data, voice minutes and SMS's. The Cell C Byond Tariff Plan offers customers tiered data/voice and SMS rates based on monthly committed recharge amounts.	Filed: 30 January 2023 Launch Date: 09 February 2023	*Table 119: Cell C Byond Tariff Plan*	Ongoing as at 30 June 2023.

Other Applicable Out-Of-Bundle Rates	
MMS	R 0.50 (per MMS)
International SMS	R 1.74 (per SMS)
International Calls	As per international calling rates
International Roaming	As per country and individual network rates

Byond Tariff Plan Rates (based on monthly committed recharge amount)				
Committed Recharge Value (Rands)		**Applicable Rates (Rands)**		
Min	**Max**	**Data Rate per MB**	**Voice Rate per Min**	**Rate per SMS**
R 199	R 398	R 0.05	R 0.70	R 0.29
R 399	R 448	R 0.04	R 0.57	R 0.29
R 449	R 498	R 0.04	R 0.57	R 0.29
R 499	R 548	R 0.04	R 0.56	R 0.29
R 549	R 598	R 0.04	R 0.54	R 0.29
R 599	R 648	R 0.04	R 0.52	R 0.29
R 649	R 698	R 0.04	R 0.50	R 0.29
R 699	R 748	R 0.03	R 0.46	R 0.29
R 749	R 798	R 0.03	R 0.43	R 0.29
R 799	R 848	R 0.03	R 0.40	R 0.29
R 849	R 898	R 0.03	R 0.38	R 0.29
R 899	R 948	R 0.02	R 0.37	R 0.29
R 949	R 998	R 0.02	R 0.36	R 0.29
R 999	R 1 098	R 0.02	R 0.36	R 0.29
R 1 099	R 1 198	R 0.02	R 0.35	R 0.29
R 1 199	R 1 298	R 0.02	R 0.35	R 0.29
R 1 299	R 1 898	R 0.02	R 0.35	R 0.29

<table>
<tr>
<td></td>
<td></td>
<td></td>
<td>
<table>
<tr><td>R 1 899</td><td>R 2 498</td><td>R 0.02</td><td>R 0.35</td><td>R 0.29</td></tr>
<tr><td>R 2 499</td><td>R 2 598</td><td>R 0.02</td><td>R 0.35</td><td>R 0.29</td></tr>
<tr><td>R 2 599</td><td></td><td>R 0.02</td><td>R 0.35</td><td>R 0.29</td></tr>
<tr><td>Default</td><td></td><td>R 0.06</td><td>R 0.99</td><td>R 0.29</td></tr>
</table>
Source: ICASA Database based on Tariff Notifications
</td>
<td></td>
</tr>
<tr>
<td>Cell C Variable Bundles Promotion</td>
<td>Cell C’s Variable Bundles Promotion entails discounted prices ranging from 1% to 100% on data and voice bundles.</td>
<td>Filed: 10 February 2023

Launch Date: 22 February 2023

Extension Dates: 12 April 2023, 25 July 2023

Expected Decommission Date: 31 October 2023</td>
<td>
Table 120: Cell C Variable Bundles Promotion
<table>
<tr><td>Price Discount</td><td>From 1% to 100%</td></tr>
<tr><td>Price</td><td>From R 0 to R 500</td></tr>
<tr><td>Anytime Data</td><td>From 1MB to 10GB</td></tr>
<tr><td>Nite Data</td><td>From 1MB to 10GB</td></tr>
<tr><td>On-net Minutes</td><td>From 1Min to 5400Min</td></tr>
<tr><td>Any-net Minutes</td><td>From 1Min to 5400Min</td></tr>
<tr><td>Validity</td><td>From 1 day to 30 days</td></tr>
<tr><td>Free Streaming Data</td><td>From 1MB to 10GB</td></tr>
<tr><td>Free Social Data</td><td>From 1MB to 10GB</td></tr>
</table>
Source: ICASA Database based on Tariff Notifications
</td>
<td>Ongoing as at 30 June 2023 and was expected to be decommissioned on 31 July 2023. However, Cell C filed another extension on 25 July 2023, extending the promotion to 31 October 2023, which will be discussed in the next reporting period.</td>
</tr>
<tr>
<td>Cell C Recharge</td>
<td>Cell C’s Recharge Enhancer Promotion entailed daily data,</td>
<td>Filed: 12 August 2022</td>
<td>
Table 121: Cell C Recharge Enhancer Promotion
<table>
<tr><th>Product Description</th><th>Validity</th><th>Subscriber Action</th></tr>
<tr><td>30MB</td><td>Valid till midnight</td><td>R 5</td></tr>
<tr><td>60MB</td><td>Valid till midnight</td><td>R 10</td></tr>
</table>
</td>
<td>Ongoing as at 30 June 2023, however it will be</td>
</tr>
</table>

<table>
<tr>
<td>Enhancer Promotion</td>
<td>voice, and integrated bundles for qualifying customers.</td>
<td>Launch Date: 24 August 2022

Extension Date: 14 February 2023

Expected Decommission Date: 31 August 2023</td>
<td>
<table>
<tr><td>100MB</td><td>Valid till midnight</td><td>R 15</td></tr>
<tr><td>150MB</td><td>Valid till midnight</td><td>R 20</td></tr>
<tr><td>6 on-net minutes</td><td>Valid till midnight</td><td>R 5</td></tr>
<tr><td>15 on-net minutes</td><td>Valid till midnight</td><td>R 10</td></tr>
<tr><td>20 on-net minutes</td><td>Valid till midnight</td><td>R 15</td></tr>
<tr><td>30 on-net minutes</td><td>Valid till midnight</td><td>R 20</td></tr>
<tr><td>30MB + 30 On-net minutes</td><td>Valid till midnight</td><td>R 5</td></tr>
<tr><td>60MB + 60 On-net minutes</td><td>Valid till midnight</td><td>R 10</td></tr>
<tr><td>100MB + 100 On-net minutes</td><td>Valid till midnight</td><td>R 15</td></tr>
<tr><td>150MB + 150 On-net minutes</td><td>Valid till midnight</td><td>R 20</td></tr>
</table>
Source: ICASA Database based on Tariff Notifications
</td>
<td>decommissioned on 31 August 2023.</td>
</tr>
<tr>
<td>Vodacom Prime Video Promotion</td>
<td>The promotion offers customers subscription to the Prime Video streaming platform for R 29 per month or R 59 per month. The latter subscription fee offers customers a free once-off 3GB and a monthly 3GB allocation. Customers have an option to top-up on depletion of the inclusive value.</td>
<td>Filed: 22 February 2023

Launch/Effective Date(s): 07 March 2023

Decommission Date: 27 September 2023</td>
<td>
Table 122: Vodacom Prime Video Top-up Bundles
<table>
<tr><th>Validity (days)</th><th>Once-Off Allocation (MB)</th><th>URL data pricing</th><th>In-bundle Rates (Rand per MB)</th></tr>
<tr><td>1</td><td>250</td><td>R 3</td><td>R 0.01</td></tr>
<tr><td>7</td><td>500</td><td>R 8</td><td>R 0.02</td></tr>
<tr><td>7</td><td>1024</td><td>R 10</td><td>R 0.01</td></tr>
<tr><td>30</td><td>2048</td><td>R 25</td><td>R 0.01</td></tr>
<tr><td>30</td><td>3072</td><td>R 30</td><td>R 0.01</td></tr>
<tr><td>30</td><td>5120</td><td>R 45</td><td>R 0.01</td></tr>
<tr><td>30</td><td>10240</td><td>R 80</td><td>R 0.01</td></tr>
</table>
Source: ICASA Database based on Tariff Notifications
</td>
<td>Ongoing as at 30 June 2023, however it will be decommissioned on 27 September 2023.</td>
</tr>
</table>

<table>
<tr>
<td>ASAP Internet on MetroFibre FTTH Promotion</td>
<td>ASAP Internet on MetroFibre FTTH entails discounted FTTH packages with line speeds ranging from 20/20Mbps to 1000/1000Mbps.</td>
<td>Filed: 28 February 2023

Launch Date: 17 March 2023

Decommission Dates: 31 July 2023</td>
<td>Table 123: ASAP Internet on MetroFibre FTTH Promotion
<table><tr><th>Product Description</th><th>Standard Price</th><th>Promotional Price</th><th>Difference</th><th>Variance (%)</th></tr><tr><td>20/20Mbps</td><td>R 475</td><td>R 240</td><td>-R 235</td><td>-49.5%</td></tr><tr><td>50/50Mbps</td><td>R 645</td><td>R 320</td><td>-R 325</td><td>-50.4%</td></tr><tr><td>100/100Mbps</td><td>R 825</td><td>R 410</td><td>-R 415</td><td>-50.3%</td></tr><tr><td>200/200Mbps</td><td>R 1 025</td><td>R 515</td><td>-R 510</td><td>-49.8%</td></tr><tr><td>500/500Mbps</td><td>R 1 250</td><td>R 625</td><td>-R 625</td><td>-50%</td></tr><tr><td>1000/1000Mbps</td><td>R 1 850</td><td>R 925</td><td>-R 925</td><td>-50%</td></tr></table>Source: ICASA Database based on Tariff Notifications</td>
<td>Ongoing as at 30 June 2023, however it was decommissioned on 31 July 2023.</td>
</tr>
<tr>
<td>MetroFibre New Modderfontein MetroConnect Promotion</td>
<td>The promotion rewards customers with zero-rated activation service and 30 days free connectivity.</td>
<td>Filed: 09 March 2023

Launch Date: 17 March 2023

Decommission Dates: 28 February 2024</td>
<td>MetroFibre’s New Modderfontein MetroConnect Promotion entails service activation at no cost and 30 days free connectivity for residents in the New Modder Area that place an order for MetroConnect Internet service in an area covered by MetroFibre’s FTTH network.</td>
<td>Ongoing as at 30 June 2023, however it will be decommissioned on 28 February 2024.</td>
</tr>
<tr>
<td>Vodacom Home Prepaid LTE Promotion</td>
<td>Vodacom’s Home Prepaid LTE Promotion offers customers promotional prices on the Home Prepaid LTE data bundles.</td>
<td>Filed: 10 June 2022

Launch/Effective Date: 22 June 2022</td>
<td>Table 124: Vodacom Home Prepaid LTE Promotion
<table><tr><th>Bundle</th><th>Recurrence</th><th>Validity</th><th>Price (Incl. VAT)</th><th>In-bundle Rate (Rand per MB)</th></tr><tr><td>50GB Anytime + 50GB Night Owl</td><td>Once-off</td><td>30 days</td><td>R 299</td><td>R 0.003</td></tr><tr><td>100GB Anytime + 100GB Night Owl</td><td>Once-off</td><td>30 days</td><td>R 349</td><td>R 0.002</td></tr></table></td>
<td>Ongoing as at 30 June 2023, however it will be decommissioned on 30 September 2023.</td>
</tr>
</table>

<table>
<tr><td></td><td></td><td>Extension Date: 22 September 2022, 17 March 2023

Decommission Date: 30 September 2023.</td><td>Source: ICASA Database based on Tariff Notifications</td><td></td></tr>
<tr><td>Telkom More (Prepaid)</td><td>The amendment of the Telkom More (Prepaid) entailed a price increase of 9.4% on the data OOB rate on the plan.</td><td>Filed: 17 March 2023

Launch (Effective) Date: 01 April 2023</td><td>Table 125: Telkom More (Prepaid)
<table><tr><th>Product Description</th><th>Previous Price</th><th>Current Price</th><th>Difference</th><th>Variance (%)</th></tr><tr><td>Data</td><td>R 0.32</td><td>R 0.35</td><td>R 0.03</td><td>9.4%</td></tr></table>Source: ICASA Database based on Tariff Notifications</td><td>Ongoing as at 30 June 2023.</td></tr>
<tr><td>Telkom SMS/MMS Bundles</td><td>Telkom’s SMS/MMS Bundles entails a suite of SMS/MMS bundles. The amendment of the Telkom SMS/MMS Bundles entailed price increases ranging from 5% to</td><td>Filed: 17 March 2023

Launch (Effective) Date: 01 April 2023</td><td>Table 126: Telkom SMS/MMS Bundles
<table><tr><th>Product Description</th><th>Previous Price (Incl. VAT)</th><th>Current Price (Incl. VAT)</th><th>Difference</th><th>Variance (%)</th></tr><tr><td>50 SMS/MMS</td><td>R 22.75</td><td>R 24</td><td>R 1.25</td><td>5%</td></tr><tr><td>100 SMS/MMS</td><td>R 35.50</td><td>R 38</td><td>R 2.50</td><td>7%</td></tr><tr><td>200 SMS/MMS</td><td>R 50.50</td><td>R 54</td><td>R 3.50</td><td>6.9%</td></tr><tr><td>500 SMS/MMS</td><td>R 113</td><td>R 119</td><td>R 6</td><td>5.3%</td></tr><tr><td>1000 SMS/MMS</td><td>R 212</td><td>R 223</td><td>R 11</td><td>5.2%</td></tr></table>Source: ICASA Database based on Tariff Notifications</td><td>Ongoing as at 30 June 2023.</td></tr>
</table>

<table>
<tr><td></td><td>7% on certain packages.</td><td></td><td></td><td></td></tr>
<tr><td>Telkom Mobile Data Bundles</td><td>The amendment of the Telkom Mobile Data Bundles entailed price increases of SMS and data OOB rates.</td><td>Filed: 23 March 2023

Launch (Effective) Date: 01 April 2023</td><td>Table 127: Telkom Mobile Data Bundles

<table><tr><th>Product Description</th><th>Previous Price</th><th>Current Price</th><th>Difference</th><th>Variance (%)</th></tr><tr><td>SMS (per SMS)</td><td>R 0.30</td><td>R 0.35</td><td>R 0.05</td><td>16.7%</td></tr><tr><td>Data (per MB)</td><td>R 0.32</td><td>R 0.35</td><td>R 0.03</td><td>9.4%</td></tr></table>Source: ICASA Database based on Tariff Notifications</td><td>Ongoing as at 30 June 2023.</td></tr>
<tr><td>MetroFibre Home Small Towns Direct Customers 20Mbps Promotion</td><td>MetroFibre’s Home Small Towns Direct Customers 20Mbps Promotion entailed a discounted 20/20Mbps line speed package and installation of a fibre infrastructure Termination Point at no cost.</td><td>Filed: 30 March 2023

Launch Date: 06 April 2023

Extension Date: 14 June 2023

Decommission Date: 31 December 2023</td><td>Table 128: MetroFibre Home Small Towns Direct Customers 20Mbps Promotion

<table><tr><th>Product Description</th><th>Applicable Package Discount</th><th>Price</th></tr><tr><td>20/20Mbps</td><td>25%</td><td>R 299</td></tr></table>Source: ICASA Database based on Tariff Notifications</td><td>Ongoing as at 30 June 2023, however it will be decommissioned on 31 December 2023.</td></tr>
<tr><td>Vodacom Home Internet Bundles</td><td>These are Once-off Home Internet Bundles available to customers on the</td><td>Filed: 14 April 2023</td><td>Vodacom changed the terms and conditions applicable to the Home Internet Bundles, wherein it specified the price plans to which the bundles are applicable. Vodacom made the Once-off Home Internet Bundles available to</td><td>Ongoing as at 30 June 2023.</td></tr>
</table>

<table>
<tr><td></td><td>Home Internet price plans to top-up upon depletion of the inclusive value.</td><td>Launch/Effective Date: 21 April 2023</td><td>Home Internet LTE price plan (10Mbps, 20Mbps, 30Mbps) and Home Internet 5G price plan (25Mbps, 50Mbps, 100Mbps and Best Effort).</td><td></td></tr>
<tr><td>Cell C Loadshedding Free Streaming and Social Bundles Promotion</td><td>Cell C's Loadshedding Free Streaming and Social Bundles Promotion entails promotional data packages ranging from 100MB to 1GB with 1 and 2-day validity periods.</td><td>Filed: 19 July 2022

Launch Date: 29 July 2022

Extension Date: 20 April 2023

Decommission Dates: 31 July 2023</td><td>Table 129: Cell C Loadshedding Free Streaming and Social Bundles Promotion

<table>
<tr><th colspan="3">Daily Video Streaming Promotional Data</th></tr>
<tr><th>Product Description</th><th>Validity</th><th>Price</th></tr>
<tr><td>100MB</td><td>Mid-night</td><td>R 0</td></tr>
<tr><td>350MB</td><td>Mid-night</td><td>R 0</td></tr>
<tr><td>500MB</td><td>Mid-night</td><td>R 0</td></tr>
<tr><th colspan="3">Two Days Video Streaming Promotional Data</th></tr>
<tr><td>100MB</td><td>2 Days</td><td>R 0</td></tr>
<tr><td>200MB</td><td>2 Days</td><td>R 0</td></tr>
<tr><td>500MB</td><td>2 Days</td><td>R 0</td></tr>
<tr><td>1GB</td><td>2 Days</td><td>R 0</td></tr>
<tr><th colspan="3">Daily Social Promotional Data</th></tr>
<tr><td>100MB</td><td>Mid-night</td><td>R 0</td></tr>
<tr><td>350MB</td><td>Mid-night</td><td>R 0</td></tr>
<tr><td>500MB</td><td>Mid-night</td><td>R 0</td></tr>
<tr><th colspan="3">Two Days Social Promotional Data</th></tr>
<tr><td>100MB</td><td>2 Days</td><td>R 0</td></tr>
<tr><td>200MB</td><td>2 Days</td><td>R 0</td></tr>
<tr><td>500MB</td><td>2 Days</td><td>R 0</td></tr>
<tr><td>1GB</td><td>2 Days</td><td>R 0</td></tr>
</table>
Source: ICASA Database based on Tariff Notifications</td><td>Ongoing as at 30 June 2023, however it will be decommissioned on 30 September 2023.</td></tr>
</table>

Cell C Upfront Payment Bundles 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 Dates: 25 July 2023 Expected Decommission Date: 31 October 2023	Cell C's Upfront Payment Bundles Promotion was analysed in the 2020/21 FY Q4 Bi-annual Tariff Analysis Report which can be found on the Authority's website on the link below: < *https://www.icasa.org.za/legislation-and-regulations/bi-annual-tariffs-analysis-report-01-jul-to-31-dec-2020* > The promotion was first extended on 18 January 2022 and has been extended seven times, with the latest extension being filed with the Authority on 25 July 2023.	Ongoing as at 30 June 2023 and was expected to be decommissioned on 31 July 2023. However, Cell C filed another extension on 25 July 2023, extending the promotion to 31 October 2023, which will be discussed in the next reporting period.
Cell C Socializa Bundles Promotion	Cell C's 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	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* > The promotion was first extended on 18 January 2022 and has been extended seven times, with the latest extension being filed with the Authority on 25 July 2023.	Ongoing as at 30 June 2023 and was expected to be decommissioned on 31 July 2023. However, Cell C filed another extension on 25 July 2023, extending the

<table>
<tr>
<td></td>
<td></td>
<td>Amendment: 28 January 2022

Extension Dates: 25 July 2023

Expected Decommission Date: 31 October 2023</td>
<td></td>
<td>promotion to 31 October 2023, which will be discussed in the next reporting period.</td>
</tr>
<tr>
<td>MetroFibre Internet Promotion</td>
<td>MetroFibre's Internet Promotion entails a 50% discount to the standard price of the MetroFibre Internet package.</td>
<td>Filed: 24 April 2023

Launch Date: 01 May 2023

Decommission Date: 31 July 2023</td>
<td>Table 130: MetroFibre Internet Promotion

<table>
<tr><th>Product Description</th><th>Standard Price</th><th>Promotional Price</th><th>Difference</th><th>Variance (%)</th></tr>
<tr><td>250/250Mbps</td><td>R 900</td><td>R 450</td><td>-R 450</td><td>-50%</td></tr>
</table>
Source: ICASA Database based on Tariff Notifications</td>
<td>Ongoing as at 30 June 2023, however it was decommissioned on 31 July 2023.</td>
</tr>
<tr>
<td>Vodacom Fibre Broadband Promotion on Frogfoot</td>
<td>The promotion rewards customers with promotional tariffs on Frogfoot’s fibre broadband packages.</td>
<td>Filed: 24 April 2023

Launch Date: 05 May 2023</td>
<td>Table 131: Vodacom Fibre Broadband on Frogfoot

<table>
<tr><th>Line Speed (Mbps)</th><th>Standard Monthly Subscription</th><th>Promotional Subscription for first 12 Months</th><th>Price Difference</th><th>Variance (%)</th></tr>
<tr><th colspan="5">12 Months Subscription</th></tr>
<tr><td>40/10</td><td>R 699</td><td>R 619</td><td>-R 80</td><td>-11.4%</td></tr>
<tr><td>40/40</td><td>R 799</td><td>R 719</td><td>-R 80</td><td>-10%</td></tr>
<tr><td>80/20</td><td>R 899</td><td>R 769</td><td>-R 130</td><td>-14.5%</td></tr>
</table></td>
<td>Ongoing as at 30 June 2023 and was expected to be decommissioned on 31 July 2023. However, Vodacom</td>
</tr>
</table>

<table>
<tr>
<td></td>
<td></td>
<td>Extension Date: 31 July 2023

Decommission Date: 30 November 2023</td>
<td>
<table>
<tr><td>80/80</td><td>R 999</td><td>R 869</td><td>-R 130</td><td>-13%</td></tr>
<tr><td>150/30</td><td>R 1 049</td><td>R 919</td><td>-R 130</td><td>-12.4%</td></tr>
<tr><td>150/150</td><td>R 1 149</td><td>R 1 019</td><td>-R 130</td><td>-11.3%</td></tr>
<tr><td>250/50</td><td>R 1 199</td><td>R 1 069</td><td>-R 130</td><td>-10.8%</td></tr>
<tr><td>250/250</td><td>R 1 299</td><td>R 1 119</td><td>-R 180</td><td>-13.9%</td></tr>
<tr><td>500/100</td><td>R 1 399</td><td>R 1 219</td><td>-R 180</td><td>-12.9%</td></tr>
<tr><td>500/500</td><td>R 1 499</td><td>R 1 319</td><td>-R 180</td><td>-12%</td></tr>
<tr><td>1000/200</td><td>R 1 599</td><td>R 1 369</td><td>-R 230</td><td>-14.4%</td></tr>
<tr><td>1000/1000</td><td>R 1 599</td><td>R 1 369</td><td>-R 230</td><td>-14.4%</td></tr>
<tr><th colspan="5">24 Months Subscription</th></tr>
<tr><td>40/10</td><td>R 699</td><td>R 599</td><td>-R 100</td><td>-14.3%</td></tr>
<tr><td>40/40</td><td>R 799</td><td>R 699</td><td>-R 100</td><td>-12.5%</td></tr>
<tr><td>80/20</td><td>R 899</td><td>R 749</td><td>-R 150</td><td>-16.7%</td></tr>
<tr><td>80/80</td><td>R 999</td><td>R 849</td><td>-R 150</td><td>-15%</td></tr>
<tr><td>150/30</td><td>R 1 049</td><td>R 899</td><td>-R 150</td><td>-14.3%</td></tr>
<tr><td>150/150</td><td>R 1 149</td><td>R 999</td><td>-R 150</td><td>-13.1%</td></tr>
<tr><td>250/50</td><td>R 1 199</td><td>R 1 049</td><td>-R 150</td><td>-12.5%</td></tr>
<tr><td>250/250</td><td>R 1 299</td><td>R 1 099</td><td>-R 200</td><td>-15.4%</td></tr>
<tr><td>500/100</td><td>R 1 399</td><td>R 1 199</td><td>-R 200</td><td>-14.3%</td></tr>
<tr><td>500/500</td><td>R 1 499</td><td>R 1 299</td><td>-R 200</td><td>-13.3%</td></tr>
<tr><td>1000/200</td><td>R 1 599</td><td>R 1 349</td><td>-R 250</td><td>-15.6%</td></tr>
<tr><td>1000/1000</td><td>R 1 599</td><td>R 1 349</td><td>-R 250</td><td>-15.6%</td></tr>
</table>
Source: ICASA Database based on Tariff Notifications
</td>
<td>filed an extension on 06 July 2023, extending the promotion to 30 November 2023, which will be discussed in the next reporting period.</td>
</tr>
<tr>
<td>Vodacom YouTube Promotion</td>
<td>Vodacom’s YouTube Promotion rewards customers with free YouTube bundles upon purchasing qualifying data bundles as determined by the operator.</td>
<td>Filed: 25 April 2023

Launch/Effective Date: 06 May 2023

Decommission Date: 31 July 2023</td>
<td>
Table 132: Vodacom YouTube Bundles Promotion
<table>
<tr><th>Data Allocation</th><th>Price</th><th>Free YouTube allocation</th></tr>
<tr><th colspan="3">Open Market 30-Day Bundles</th></tr>
<tr><td>200MB</td><td>R 29</td><td>50MB FREE YouTube for 1 day</td></tr>
<tr><td>350MB</td><td>R 49</td><td>100MB FREE YouTube for 1 day</td></tr>
<tr><td>500MB</td><td>R 69</td><td>250MB FREE YouTube for 7 days</td></tr>
<tr><td>1GB</td><td>R 85</td><td>500MB FREE YouTube for 7 days</td></tr>
<tr><td>2GB</td><td>R 149</td><td>1GB FREE YouTube for 30 days</td></tr>
<tr><td>4GB</td><td>R 249</td><td>2GB FREE YouTube for 30 days</td></tr>
<tr><td>6GB</td><td>R 349</td><td>3GB FREE YouTube for 30 days</td></tr>
<tr><td>10GB</td><td>R 469</td><td>5GB FREE YouTube for 30 days</td></tr>
<tr><td>15GB</td><td>R 529</td><td>10GB FREE YouTube for 30 days</td></tr>
<tr><td>30GB</td><td>R 699</td><td>10GB FREE YouTube for 30 days</td></tr>
<tr><td>50GB</td><td>R 799</td><td>10GB FREE YouTube for 30 days</td></tr>
</table>
</td>
<td>Ongoing as at 30 June 2023, however it was decommissioned on 31 July 2023.</td>
</tr>
</table>

<table>
<tr><td></td><td></td><td></td><td>
<table>
<tr><td>100GB</td><td>R 999</td><td>10GB FREE YouTube for 30 days</td></tr>
<tr><td colspan="3">Open Market 7-Day Bundles</td></tr>
<tr><td>250MB</td><td>R 29</td><td>50MB FREE YouTube for 1 day</td></tr>
<tr><td>500MB</td><td>R 49</td><td>100MB FREE YouTube for 1 day</td></tr>
<tr><td>1GB</td><td>R 69</td><td>250MB FREE YouTube for 7 days</td></tr>
<tr><td>3GB (1.5GB + 1.5GB Free)</td><td>R 89</td><td>1GB FREE YouTube for 7 days</td></tr>
<tr><td>2GB</td><td>R 99</td><td>500MB FREE YouTube for 7 days</td></tr>
<tr><td>5GB</td><td>R 199</td><td>2GB FREE YouTube for 7 days</td></tr>
</table>
Source: ICASA Database based on Tariff Notifications
</td><td></td></tr>
<tr><td>Vodacom Order of Consumption Rules</td><td>Vodacom filed an amendment to its Voice and SMS order of consumption rules.</td><td>Filed: 28 April 2023

Launch/Effective Date: 07 May 2023</td><td>Vodacom altered the consumption rules applicable to voice and SMS services offered on post-paid and hybrid tariff plans from “last-in-first-out” (LIFO) to “first-in-first-out” (FIFO). Therefore, the oldest allocation of voice and SMS bundle(s) will be depleted first before the consumption of newly allocated voice and SMS bundle(s).</td><td>Ongoing as at 30 June 2023.</td></tr>
<tr><td>MetroFibre ISP 250Mbps Package Promotion</td><td>MetroFibre’s ISP 250Mbps Package Promotion rewards customers with a free line speed upgrade.</td><td>Filed: 04 May 2023

Launch Date: 01 June 2023

Decommission Dates: 30 September 2023</td><td>The promotion offers existing customers on the 20Mbps package an additional 230Mbps for a total subscription of R 550 per month; and existing customers on the 50Mbps package an additional 200Mbps for a total subscription of R 550 per month.</td><td>Ongoing as at 30 June 2023, however it will be decommissioned on 30 September 2023.</td></tr>
<tr><td>Cell C Home Connecta</td><td>Cell C’s Home Connecta Zoom Fibre</td><td>Filed: 05 May 2023</td><td>Table 133: Cell C Home Connecta Zoom Fibre 25Mbps Promotion
<table>
<tr><th>Product Description</th><th>Standard Price (Incl. VAT)</th><th>Promotional Price (Incl. VAT)</th><th>Difference</th><th>Variance</th></tr>
</table>
</td><td>Ongoing as at 30 June 2023 and was</td></tr>
</table>

<table>
<tr>
<td>Zoom Fibre 25Mbps Promotion</td>
<td>25Mbps Promotion entailed a discounted price on the 25/25Mbps package for the customer's first 12 calendar months of service.</td>
<td>Launch Date: 17 May 2023

Extension Date: 25 July 2023

Decommission Dates: 31 August 2023</td>
<td>
<table>
<tr><td>25/25Mbps</td><td>R 569</td><td>R 399</td><td>-R 170</td><td>-29.9%</td></tr>
</table>
Source: ICASA Database based on Tariff Notifications
</td>
<td>expected to be decommissioned on 31 July 2023. However, Cell C filed another extension on 25 July 2023, extending the promotion to 31 August 2023, which will be discussed in the next reporting period.</td>
</tr>
<tr>
<td>Telkom 100GB LTE Night Surfer Promotion</td>
<td>Telkom's 100GB LTE Night Surfer Promotion entails a promotional discount of 33.6% on the 100GB LTE Night Surfer.</td>
<td>Filed: 10 May 2023

Launch Date: 20 May 2023

Decommission Dates: 15 September 2023</td>
<td>
Table 134: Telkom 100GB LTE Night Surfer Promotion
<table>
<tr><th>Product Description</th><th>Standard Price (Incl. VAT)</th><th>Promotional Price (Incl. VAT)</th><th>Difference</th><th>Variance</th></tr>
<tr><td>100GB LTE Night Surfer</td><td>R 149</td><td>R 99</td><td>-R 50</td><td>-33.6%</td></tr>
</table>
Source: ICASA Database based on Tariff Notifications
</td>
<td>Ongoing as at 30 June 2023, however it will be decommissioned on 15 September 2023.</td>
</tr>
<tr>
<td>MTN Refer a Friend to</td>
<td>The promotion rewards MTN subscribers with a</td>
<td>Filed: 12 May 2023</td>
<td>The promotion rewards MTN subscribers with a promotional 1GB data bundle valid for an hour upon successfully referring customers under the age of 25</td>
<td>Ongoing as at 30 June 2023, however it was</td>
</tr>
</table>

<table>
<tr>
<td>Pulse Promotion</td>
<td>free data bundle upon successfully referring qualifying customers to the Pulse price plan.</td>
<td>Launch/Effective Date: 25 May 2023

Decommission Date: 31 July 2023</td>
<td>years to the Pulse price plan. All MTN subscribers are able to refer a MTN prepaid subscriber to the prepaid Pulse price plan.</td>
<td>decommissioned on 31 July 2023.</td>
</tr>
<tr>
<td>MTN Supersonic Zoom Fibre Promotion</td>
<td>The promotion entails reduced the subscription fees for selected Zoom fibre packages.</td>
<td>Filed: 31 May 2023

Launch/Effective Date: 09 June 2023

Decommission Date: 09 September 2023</td>
<td>Table 135: MTN Supersonic on Zoom Fibre Promotional Offer

<table>
<tr><th>Line Speed (Mbps)</th><th>Current Price</th><th>Promotional Price</th><th>Price Difference</th><th>Variance (%)</th></tr>
<tr><td>10/10</td><td>R 429</td><td>R 349</td><td>-R 80</td><td>-18.6%</td></tr>
<tr><td>25/25</td><td>R 629</td><td>R 539</td><td>-R 90</td><td>-14.3%</td></tr>
<tr><td>50/50</td><td>R 769</td><td>R 689</td><td>-R 80</td><td>-10.4%</td></tr>
<tr><td>100/100</td><td>R 929</td><td>R 839</td><td>-R 90</td><td>-9.7%</td></tr>
<tr><td>200/200</td><td>R 1 099</td><td>R 979</td><td>-R 120</td><td>-10.9%</td></tr>
<tr><td>500/500</td><td>R 1 199</td><td>R 1 099</td><td>-R 100</td><td>-8.3%</td></tr>
<tr><td>1000/500</td><td>R 1 649</td><td>R 1 599</td><td>-R 50</td><td>-3%</td></tr>
</table>
Source: ICASA Database based on Tariff Notifications</td>
<td>Ongoing as at 30 June 2023, however it will be decommissioned on 09 September 2023.</td>
</tr>
<tr>
<td>Vodacom Extra Airtime Promotion</td>
<td>The promotion rewards customers with additional airtime with every qualifying recharge.</td>
<td>Filed: 03 June 2023

Launch/Effective Date: 13 June 2023

Decommission Date: 14</td>
<td>Vodacom’s Extra Airtime Promotion rewards customers with an additional 30% of the purchased airtime value. The Extra Airtime Promotion is available to prepaid and hybrid customers who purchase airtime on the VodaPay app.</td>
<td>Ongoing as at 30 June 2023, however it will be decommissioned on 14 December 2023.</td>
</tr>
</table>

<table>
<tr><td></td><td></td><td>December 2023</td><td></td><td></td></tr>
<tr><td>MTN Pulse to Pulse Rate Change</td><td>MTN amended its Pulse price plan wherein it adjusted the OOB voice rate of the plan to other MTN Pulse subscribers (Pulse-to-Pulse).</td><td>Filed: 07 June 2023

Launch/Effective Date: 15 June 2023</td><td>The adjustment was an increase and the tariff charged on OOB voice rate by R 0.29 or 58% from R 0.50 to R 0.79 per minute.</td><td>Ongoing as at 30 June 2023.</td></tr>
<tr><td>MTN Zone Higher Discount Rates and Decommissioning of old plans</td><td>MTN amended its MTN Zone price plan by increasing voice call discount rates.</td><td>Filed: 07 June 2023

Launch/Effective Date: 15 June 2023</td><td>The operator increased its discount rates from the current 30% to up to 42.3% discounts on the fixed voice rate of R 2.60.</td><td>Ongoing as at 30 June 2023.</td></tr>
<tr><td>Cell C Integrated Data and Voice Bundle Promotion</td><td>Cell C Integrated Data and Voice Bundles Promotion entailed a 2GB data and 60 minutes bundle which is priced at R 29.</td><td>Filed: 12 June 2023

Launch Date: 01 July 2023

Decommission Dates: 30 September 2023</td><td>Table 136: Cell C Integrated Data and Voice Bundle Promotion
<table><tr><th>Minutes</th><th>Data</th><th>Validity</th><th>Price</th></tr><tr><td>60</td><td>2GB</td><td>7 days</td><td>R 29</td></tr></table>Source: ICASA Database based on Tariff Notifications</td><td>Ongoing as at 30 June 2023, however it will be decommissioned on 30 September 2023.</td></tr>
</table>

<table>
<tr>
<td>MTN 3-day YouTube Bundle Promotion</td>
<td>The promotion rewards customers with a free data bundle upon purchasing the 3-day 1.5GB data bundle.</td>
<td>Filed: 13 June 2023

Launch/Effective Date: 27 June 2023

Decommission Date: 27 July 2023</td>
<td>MTN’s YouTube Promotion on 3-Day 1.5GB Bundle rewards customers with a 200MB YouTube data bundle upon purchasing the 3-day 1.5GB data bundle. The promotional bundle is valid for 1 hour from the time of allocation.</td>
<td>Ongoing as at 30 June 2023, and was expected to be decommissioned on 27 July 2023. However, MTN filed another extension on 25 July 2023, extending the promotion to 31 January 2024, which will be discussed in the next reporting period.</td>
</tr>
<tr>
<td>ASAP Internet on MetroFibre FTTH Promotion</td>
<td>ASAP Internet on MetroFibre FTTH Promotion entails discounted FTTH packages with line speeds ranging from 20/20Mbps to 1000/1000Mbps.</td>
<td>Filed: 30 August 2022

Launch Date: 09 September 2022

Extension Date: 13 June 2023</td>
<td>Table 137: ASAP Internet on MetroFibre FTTH Promotion
<table>
<tr><th>Product Description</th><th>Standard Price</th><th>Promotional Price</th><th>Difference</th><th>Variance (%)</th></tr>
<tr><td>20/20Mbps</td><td>R 475</td><td>R 240</td><td>-R 235</td><td>-49.5%</td></tr>
<tr><td>50/50Mbps</td><td>R 645</td><td>R 320</td><td>-R 325</td><td>-50.4%</td></tr>
<tr><td>100/100Mbps</td><td>R 825</td><td>R 410</td><td>-R 415</td><td>-50.3%</td></tr>
</table></td>
<td>Ongoing as at 30 June 2023, however it will be decommissioned on 31 December 2023.</td>
</tr>
</table>

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<td>Decommission Date: 31 December 2023</td>
<td>
<table>
<tr><td>200/200Mbps</td><td>R 1 025</td><td>R 515</td><td>-R 510</td><td>-49.8%</td></tr>
<tr><td>500/500Mbps</td><td>R 1 250</td><td>R 625</td><td>-R 625</td><td>-50%</td></tr>
<tr><td>1000/1000Mbps</td><td>R 1 850</td><td>R 925</td><td>-R 925</td><td>-50%</td></tr>
</table>
Source: ICASA Database based on Tariff Notifications
</td>
<td></td>
</tr>
<tr>
<td>Cell C 4Eva Launch Promotion</td>
<td>Cell C’s 4Eva Launch Promotion rewards customers with a promotional voice rate discount of 50.5% on the Cell C 4Eva Tariff Plan.</td>
<td>Filed: 14 June 2023

Launch Date: 27 June 2023

Extension Date: 18 July 2023

Decommission Dates: 31 October 2023</td>
<td>
Table 138: Cell C 4Eva Launch Promotion
<table>
<tr><th>Product Description</th><th>Standard Price (Rand/Min)</th><th>Promotional Price (Rand/Min)</th><th>Difference</th><th>Variance (%)</th></tr>
<tr><td>All-net Voice Rate</td><td>R 0.99</td><td>R 0.49</td><td>-R 0.50</td><td>-50.5%</td></tr>
</table>
Source: ICASA Database based on Tariff Notifications
</td>
<td>Ongoing as at 30 June 2023 and was expected to be decommissioned on 30 July 2023. However, Cell C filed another extension on 18 July 2023, extending the promotion to 31 October 2023, which will be discussed in the next reporting period.</td>
</tr>
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<tr>
<td>MTN Supersonic July Real Deals Promotion</td>
<td>MTN's Supersonic July Real Deals Promotion is exclusive to the On-the-Go customers.</td>
<td>Filed: 21 June 2023

Launch/Effective Date: 03 July 2023

Decommission Date: 31 July 2023</td>
<td>The promotion rewards new On-the-Go customers who sign up for the 25GB or 50GB package with a free MiFi device.</td>
<td>Ongoing as at 30 June 2023, however it was decommissioned on 31 July 2023.</td>
</tr>
<tr>
<td>MetroFibre Direct Customers Moreleta and The Meadows Promotion</td>
<td>The promotion rewards customers a zero-rated subscription rate.</td>
<td>Filed: 26 June 2023

Launch Date: 01 July 2023

Decommission Date: 31 December 2023</td>
<td>MetroFibre Direct Customers Moreleta and The Meadows Promotion entails a zero-rated subscription rate for the first two months for existing direct customers that upgrade their service or new direct customers.</td>
<td>Ongoing as at 30 June 2023, however it will be decommissioned on 31 December 2023.</td>
</tr>
<tr>
<td>MetroFibre Go50 Vumatel July and August 2023 Promotion</td>
<td>MetroFibre Go50 Vumatel July and August 2023 Promotion entails discounted rates on the GO50 package on the Vumatel network</td>
<td>Filed: 27 June 2023

Launch Date: 01 July 2023</td>
<td>Table 139: MetroFibre Go50 Vumatel July and August 2023 Promotion
<table><tr><th>Product Description</th><th>Standard Price</th><th>Promotional Price</th><th>Difference</th><th>Variance (%)</th></tr><tr><td>Go50 (50/50Mbps)</td><td>R 649</td><td>R 599</td><td>-R 50</td><td>-7.7%</td></tr></table>Source: ICASA Database based on Tariff Notifications</td>
<td>Ongoing as at 30 June 2023, however it will be decommissioned on 30 September 2023.</td>
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<td></td>
<td>and fibre line installation and activation at no cost.</td>
<td>Extension Date: 19 July 2023.

Decommission Date: 30 September 2023</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vodacom Fibre Broadband on Zoom Fibre</td>
<td>The operator introduced new fibre packages with the aim to compete and increase footprint in the fibre services market.</td>
<td>Filed: 28 June 2023

Launch Date: 07 July 2023</td>
<td>Table 140: Fibre Broadband on Zoom Fibre

<table>
<tr><th>Line Speed (Mbps)</th><th>Monthly Subscription</th><th>Promotional Pricing</th><th>Price Difference</th><th>Variance (%)</th></tr>
<tr><td>10/10</td><td>R 479</td><td>R 299</td><td>-R 180</td><td>-37.6%</td></tr>
<tr><td>25/25</td><td>R 629</td><td>R 399</td><td>-R 230</td><td>-36.6%</td></tr>
<tr><td>50/50</td><td>R 799</td><td>R 499</td><td>-R 300</td><td>-37.5%</td></tr>
<tr><td>100/100</td><td>R 929</td><td>R 599</td><td>-R 330</td><td>-35.5%</td></tr>
<tr><td>200/200</td><td>R 1 059</td><td>R 699</td><td>-R 360</td><td>-34%</td></tr>
<tr><td>500/250</td><td>R 1 189</td><td>R 799</td><td>-R 390</td><td>-32.8%</td></tr>
<tr><td>1000/500</td><td>R 1 599</td><td>R 1 199</td><td>-R 400</td><td>-25%</td></tr>
</table>
Source: ICASA Database based on Tariff Notifications

It should be noted that the promotional aspect of the plan became effective from 07 July 2023 until 31 July 2023.</td>
<td>Ongoing as at 30 June 2023, however, the promotional aspect of the plan will be decommissioned on 31 July 2023.</td>
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</table>

Annexure B: Promotions that Ended During the Period Under Review

TARIFF PLAN	EXPLANATION OF THE TARIFF PLAN	RELEVANT DATES
Cell C Free Bundles Promotion	Cell C's Free Bundles Promotion entailed free data, voice and social media bundles that were made available to selected prepaid/hybrid customers from time to time.	Filed: 07 October 2022 Launch Date: 18 October 2022 Extension Date: 19 January 2023 Decommission Date: 31 March 2023
MyMTN Home Capped and Uncapped Promotion	MTN's Home Capped and Uncapped Promotion offered discounted capped and uncapped Home deals.	Filed: 23 January 2023 Launch Date: 01 February 2023 Decommission Date: 31 March 2023
Rain 4G Pay As You Use SA 20 Promotion	Rain's 4G Pay As You Use SA 20 Promotion entailed a 4G mobile data Gigs package which is priced at R 50, which includes additional 6GB allocated upon SIM card activation for new Rain customers and 10GB for existing customers.	Filed: 03 February 2023 Launch Date: 08 February 2023 Decommission Date: 12 February 2023
Rain 5G gift voucher SA 20 Promotion	Rain's 5G gift voucher SA 20 Promotion entailed a R 300 credit on any Rain 5G product home purchase.	Filed: 03 February 2023 Launch Date: 08 February 2023

		Decommission Date: 12 February 2023
MTN Add on Bundles Promotion for Personalised Bundles	The promotion rewarded qualifying customers with free URL-specific add-on bundles upon purchasing the qualifying data bundle(s).	Filed: 14 December 2022 Launch Date: 22 December 2022 Extension Date: 20 February 2023 Decommission Date: 30 June 2023
MetroFibre Reseller 500Mbps Promotion	MetroFibre's Reseller 500Mbps Promotion entailed the upgrade of selected line speeds to 500Mbps.	Filed: 10 February 2023 Launch Date: 01 March 2023 Decommission Date: 30 April 2023
MetroFibre ISP 400Mbps Promotion	MetroFibre's ISP 400Mbps Promotion entailed the upgrade of selected line speeds to 400Mbps.	Filed: 10 February 2023 Launch Date: 01 March 2023 Decommission Date: 31 April 2023
Telkom Unlimited All Hours Promotion	Telkom's Unlimited All Hours Promotion entailed a single LTE 7-day package which is priced at R 299.	Filed: 17 February 2023 Launch Date: 01 March 2023 Decommission Date: 01 May 2023
Telkom Unlimited Off-Peak Promotion	Telkom's Unlimited Off-Peak Promotion entailed a single LTE 7-day package which is priced at R 129.	Filed: 17 February 2023 Launch Date: 01 March 2023

		Decommission Date: 01 May 2023
MetroFibre Go50 Vumatel Promotion	MetroFibre's Go50 Vumatel Promotion entailed a discounted price for the 50/50Mbps FTTH package.	Filed: 20 February 2023 Launch Date: 01 March 2023 Decommission Date: 01 May 2023
MTN PAYG Add-on Bundles Promotion	The PAYG Data Add-on Bundles rewarded customers with bonus data bundles on selected prepaid Anytime data bundles.	Filed: 02 November 2022 Launch Date: 11 November 2022 Extension Date: 20 February 2023 Decommission Date: 30 June 2023
MetroFibre Go100 Vumatel Promotion	MetroFibre's Go100 Vumatel Promotion entailed a discounted price for the 100/100Mbps FTTH package.	Filed: 20 February 2023 Launch Date: 01 March 2023 Decommission Date: 01 May 2023
Cell C Double Anytime Day by Day Promotion	Cell C's Double Anytime Day by Day Promotion entailed a daily allocation of 300MB anytime data for 3 days.	Filed: 22 February 2023 Launch Date: 01 March 2023 Decommission Date: 01 May 2023
MetroFibre Small Towns ISP/Reseller Customers 20Mbps Promotion	MetroFibre's Small Towns ISP/Reseller Customers 20Mbps Promotion entailed a discounted line speed package for 12 months and an installation of a fibre Termination Point at no cost.	Filed: 30 March 2023 Launch Date: 06 April 2023

		Decommission Date: 30 June 2023
MTN Supersonic Zoom fibre Promotion	The promotion entailed a reduction of the subscription fees of selected Zoom fibre packages.	Filed: 01 March 2023 Launch Date: 10 March 2023 Decommission Date: 09 June 2023
MTN PAYG Data Bundles Termination	MTN's termination notification entailed a discontinuation of selected PAYG data bundles.	Filed: 16 March 2023 Launch/Effective Date: 24 March 2023
MTN Real Deal Fixed LTE Promotion	The promotion offered customers a Fixed LTE lite package at a reduced price for the month of April 2023.	Filed: 16 March 2023 Launch Date: 01 April 2023 Decommission Date: 30 April 2023
MTN Supersonic Makhe, Stokvel & Hotspot Proposition	MTN's Supersonic Makhe, Stokvel & Hotspot plan offered Internet connectivity services in Protea Glen and other identified townships.	Filed: 29 March 2023 Launch Date: 15 April 2023 Decommission Date: 21 June 2023
MTN PAYG Price Plan Promotion & Device Value Add Promotion	The promotion rewarded customers with standard data and URL-specific data bundles. The Device Value Adds Promotion is available to new customers purchasing locked and unlocked devices with a new starter pack from participating retail partners.	Filed: 30 March 2023 Launch/Effective Date: 13 April 2023 Decommission Date: 08 June 2023

MTN Real Deal for the Fixed LTE Lite	The Real Deas for the Fixed LTE Lite offered customers a discounted FLTE package. Customers who signed up for the offer remained on the promotional price point for a period of 12 months.	Filed: 24 April 2023 Launch Date: 05 May 2023 Decommission Date: 31 May 2023
MetroFibre Go Vodacom November 2022 Promotion	MetroFibre's Go Vodacom November & December 2022 Promotion entails FTTH packages with prices ranging from R 519 to R 899.	Filed: 31 October 2022 Launch Date: 01 November 2022 Extension Date: 31 March 2023 Decommission Date: 30 April 2023
MetroFibre Go Vumatel March and June 2023 Promotion	MetroFibre's Go Vumatel Promotion (previously called MetroFibre Go Vumatel March and April 2023 Promotion) entails a reduced price on the Go 50Mbps and Go100 packages	Filed: 20 February 2023 Launch Date: 01 March 2023 Extension Date(s): 11 April 2023, 16 May 2023 Decommission Date: 30 June 2023
MTN PAYG and Post-paid Bundles	MTN discontinued selected PAYG and Post-paid bundle offerings in its portfolio.	Filed: 24 April 2023 Launch/Effective Date: 15 May 2023
MetroFibre Go Vumatel March 2023 and June 2023 Promotion	MetroFibre's Go Vumatel March 2023 & May 2023 Promotion entails a reduced price on the Go50 and Go100 packages.	Filed: 20 February 2023 Launch Date: 01 March 2023

		Extension Date: 11 April 2023, 16 May 2023 Decommission Date: 30 June 2023
Cell C Socializa Boost Promotion	Cell C's Socializa Boost Promotion entailed daily, weekly and monthly promotional bundles that allow customers to upgrade their Socializa bundles with an add-on service which allows the customer to access various social media platforms from the same bundle.	Filed: 23 May 2023 Launch Date: 02 June 2023 Decommission Date: 30 June 2023
MetroFibre Go Vumatel Flash Incentive Promotion	MetroFibre's Go Vumatel Flash Incentive Promotion entails a zero-rated subscription fee for new customers for a period of up to 3 months (ending 31 August 2023) that sign up on a Go50, Go100 or Go200 package during the promotional sign-up period, after which the full standard package pricing will apply.	Filed: 31 May 2023 Launch Date: 02 June 2023 Decommission Date: 06 June 2023
MTN PAYG Price Plans	MTN decommissioned the following PAYG price plans: • MTN Pay Per Second; • PEP Club - MTNZone; • MTN Talk Free; • MTN PEP Bundle Bonanza PP; • PEP Club - Pay Per Second; • PEP Club - Talk Free; • MTN 1c Per Second; and • PEP Club - 1c Per Second.	Filed: 07 June 2023 Decommission Date: 15 June 2023