



**Independent Communications Authority of South Africa**

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**BI-ANNUAL REPORT ON THE ANALYSIS OF TARIFF NOTIFICATIONS  
SUBMITTED TO ICASA FOR THE PERIOD 01 JULY 2024 TO 31 DECEMBER  
2024 – ABRIDGED REPORT**

**1. Introduction**

- This is an abridged report of Bi-annual Report on the analysis of Tariff Notifications submitted to ICASA for the Period 01 July 2024 to 31 December 2024. This report is produced for the benefit of those consumers that may not have time to read the full report.
- Section 2 highlights the aim of the tariff analysis report. Section 3 indicates the number of tariff notifications received by ICASA. Section 4 provides key findings from ICASA's tariff notification analysis. Section 5 gives the conclusion.

**2. What is the aim of the Tariff Analysis Report?**

- ICASA produces two (2) Bi-annual reports on the Analysis of tariff notifications submitted to ICASA by various telecommunications licensees on an annual basis. The first Bi-annual report covered the period 01 January 2024 to 30 June 2024. The second Bi-annual report covers the period 01 July 2024 to 31 December 2024.

- The Tariff Analysis Report gives an overview of the Bi-annual Tariff Notifications as well as an update on tariffs that were filed by various telecommunications licensees during the period under review.
- The aim of the Tariff Analysis Report is to ensure that there is retail price transparency in line with object 2(n) of the Electronic Communications Act, 2005 which is to “promote the interests of consumers with regard to the price, quality and the variety of electronic communication services”.

### **3. How many tariff notifications were received?**

- ICASA received a total of 401 tariff notifications, which consisted of 158 new promotions, 103 amendments, 56 extensions, 10 terminations and 74 new products from the period 01 July 2024 to 31 December 2024.

## **4. Key Findings from ICASA’s Tariff Notification Analysis**

### **4.1. Mobile Data Services Market**

In the mobile data services market, the Authority observed continued filings pertaining to personalised data bundles offered by the major MNO’s namely Vodacom and MTN since the previous reporting period. The operators offer customers personalised data bundle deals based on individual spending patterns/profiles and geographic location. For example, in the period under review Vodacom introduced its Just 4 You 7 Day Bundles which entail data bundles valid for 7 days ranging from 2GB (at R 39) to 20GB (at R 149).

### **4.2. MNO and MVNO Market**

- The Authority provided a comparative analysis of contrast in prices of standard prepaid data bundles offered by MNOs and MVNOs in the market.

The analysis shows that during the period under review, MVNOs offer their data bundles at price that are relatively lower than those charged by MNOs. Furthermore, other MVNOs (i.e., Sakeng and Shoprite) offer data bundles with longer validity periods.

While Vodacom and MTN offer a 600MB data bundle priced at R 74 and R 75, respectively, the in-bundle rates indicate that they still charge more than the selected MVNOs. For example, Sakeng's in-bundle rate of R 0.10 per MB for its 500MB is less than Vodacom and MTN's at R 0.12 per MB and R 0.13 per MB, respectively.

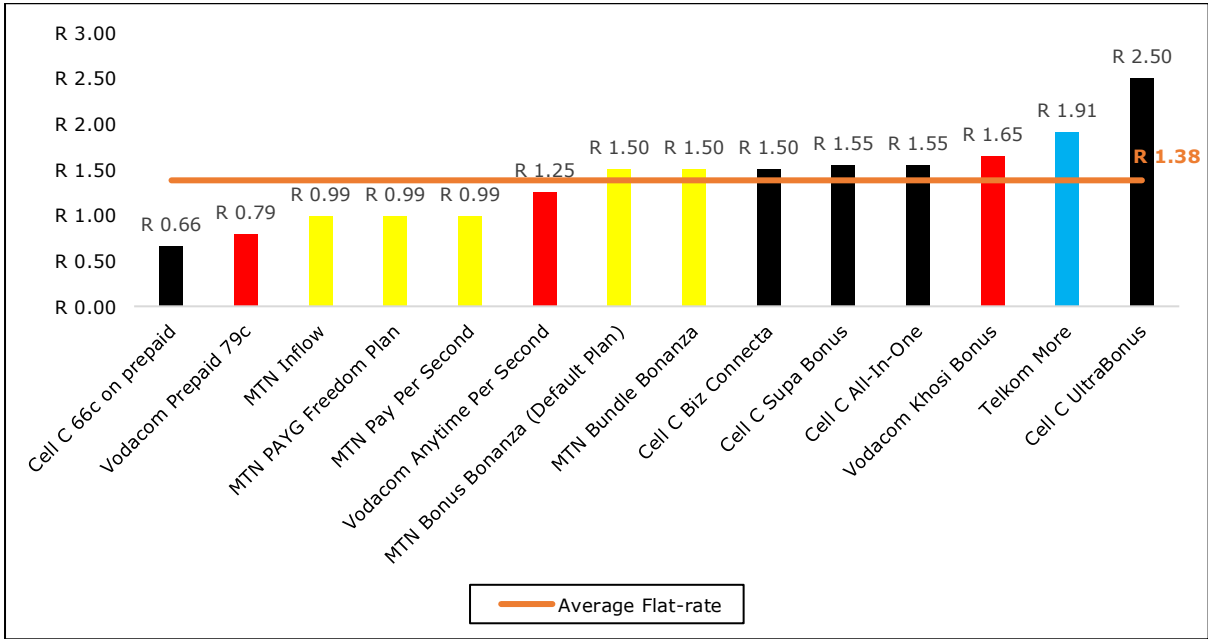
#### **4.3. Voice Services Market**

- In the voice services market, the Authority observed an increase in OOB voice rates from MTN, Vodacom and Cell C. For example, MTN increased the Bundle Bonanza Tariff Plan OOB voice rate by R 0.30 or 25% from R 1.20 to R 1.50 per minute.
- Cell C increased the OOB voice rate on its SupaBonus tariff plan, with the voice rate increasing by R 0.06 or 4%, from R 1.49 to R 1.55 per minute (billed per second).
- Vodacom increased the OOB voice rate on its Power Pack and Khosi Bonus tariff plans, with the voice rate increasing by R 0.10 or 6.5%, from R 1.55 to R 1.65 per minute.
- Figure 1 shows flat-rate voice tariffs offered by Vodacom, MTN, Cell C and Telkom.
- Cell C's 66c on Prepaid tariff plan is still the lowest or least expensive flat-rate offered by the MNOs, and the Cell C Ultra Bonus is the highest or most expensive on the depicted flat-rate tariffs. On average, customers are charged R 1.38 per minute on OOB rate voice calls. As shown in the figure

below, six of the fourteen flat rates charge below the average flat-rate of R 1.38 per minute.

- Vodacom’s amended Khosi Bonus flat rate ranks 7th (from the least expensive to the most expensive) among the depicted tariffs, which unchanged from the previous reporting period and is now 19.6% above the average rate.
- Six of the fourteen flat rates shown in the figure below, charge flat rates below the average of R 1.38 per minute.

Figure 1: OOB Flat-rates per minute



Source: ICASA Database based on Filed Tariff Notifications

#### 4.4. Fibre Services Market

- The Authority continues to provide a comparative analysis of Fibre-to-the-Home (FTTH) packages provided on 3rd party FNOs to show how different Internet Service Providers (ISPs) price their packages of the same line speeds versus the average market price.

- The analysis shows that during the period under review, the approximated average prices for the 50/50Mbps and 100/100Mbps decreased by 0.9% and 1.1% to R 771.03 and R 932.18 from the previous reporting period, respectively, while the average price of the 25/25Mbps increased by 0.2% to R 563.64. The reduction in the average subscription fee can be explained by the reduction of subscription fees and/or an addition of new fibre packages that are priced below the average subscription fee in the previous reporting period.
  
- On the 25/25Mbps line speed, MTN's 25/25Mbps FTTH on Zoom Fibre's network had the lowest subscription fee of R 419 which translates to the largest below average price deviation of 25.7%. Among the sampled fibre plans, Cell C's 25/25Mbps package on Purple Forest has the highest subscription fee of R 749, which translates to the largest deviation above the average price of 32.9%.
  
- On the sampled 50/50Mbps line speed, ASAP Internet's 50/50Mbps on Vumatel FTTH has the lowest subscription fee of R 520 which translates to the largest below average price deviation of 32.6%. Cell C's 50/50Mbps package on Netstream has the highest subscription fee of R 1 049, which translates to the largest deviation above the average price of 36%.
  
- The average price of the sampled 100/100Mbps line speeds was R 942.18 per month, with Cybersmart's 100/100Mbps FTTH on Openserve Fibre having the lowest subscription fee of R 560 which translates to the largest below average price deviation of 40%. Cell C's 100/100Mbps package on Netstream has the highest subscription fee of R 1 259, which translates to the largest deviation above the average price of 35%.

#### **4.4 Over-the-Top (OTT) Service Offerings**

- In order to capitalise on the growth in uptake of OTT services, licensed operators continue to launch various product offerings so as to maximise their data revenues.
- During the period under review, MTN introduced its OTT Subscription Bundles which offer customers video bundles that are linked to an OTT platform subscription. These URL-specific data bundles benefit customers with affordable prices which translate to low in-bundle rates.
- MTN introduced its TikTok 1GB Promotion wherein it offers daily TikTok bundles which are priced from R 1 to R 5.
- Cell C's CVM bundles continue to benefit customers with affordable promotional bundles.

#### **4.5 Fixed Wireless Access Services (LTE, 5G and Wireless fibre Internet services)**

- The Authority observed a continued competitiveness in the provision of LTE, 5G and Wireless Internet services, with 26 notifications received during the period under review.
- For instance, MTN introduced a new 14-day 3GB + 3GB bundle that is priced at R 49 on its BozzaGigs LTE price plan.
- On the other hand, Rain introduced its Xtender Option wherein it enables customers the option to extend the range of their coverage by utilising the operator's WiFi extenders.

## **5. Conclusion**

- ICASA observes efforts by operators to charge competitive data prices, with price reductions from various tariff notifications filed by licensees. ICASA will continue to monitor and publish its reports with retail market prices to ensure that subscribers have information on the competitive rates which are prevailing in the market.
- The full Bi-annual Report on the analysis of Tariff Notifications submitted to ICASA for the Period 01 July 2024 to 31 December 2024 is available on ICASA's website.