

**BI-ANNUAL REPORT ON THE ANALYSIS OF TARIFF NOTIFICATIONS
SUBMITTED TO ICASA FOR THE PERIOD 01 JULY 2025 TO 31 DECEMBER
2025 – ABRIDGED REPORT**

1. Introduction

- This is an abridged report of the Bi-annual Report on the analysis of Tariff Notifications submitted to ICASA for the Period 01 July 2025 to 31 December 2025. This report is produced for the benefit of those consumers who 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 2025 to 30 June 2025. The second Bi-annual report covers the period 01 July 2025 to 31 December 2025.
- 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 279 tariff notifications, which consisted of 119 new promotions, 63 amendments, 47 promotion extensions, 2 terminations, and 48 new products from the period 01 July 2025 to 31 December 2025.

4. Key Findings from ICASA's Tariff Notification Analysis

4.1. Mobile Data Services Market

- In the mobile data services market, the Authority received an amendment notification from Telkom Mobile in the period under review. The operator's amendment entailed price adjustments and the introduction of new bundles. Telkom decreased the price of the 150MB data bundle by R 2 or 6.9% from R 29 to R 27. The 20GB data bundle was also reduced by R 135 or 18.4% from R 734 to R 599, while the 50GB data bundle was reduced by R 875 or 55.6% from R 1 574 to R 699. Telkom Mobile introduced a 1.2GB data bundle (valid for current + 2 months) at a price of R 79, a 2.5GB data bundle (valid for current + 2 months) at a price of R 149, a 5.5GB data bundle (valid for current + 2 months) at a price of R 299 and a 12GB data bundle (valid for current + 2 months) at a price of R 499.

4.2. MNO and MVNO Market

- The Authority provided a comparative analysis of the contrast in prices of standard prepaid data bundles offered by MNOs and MVNOs in the market.
- The Authority observed an increase in the number of MVNO prepaid plans in the market, and the comparative analysis of data bundles offered by MNOs and MVNOs continues to reveal that MVNOs offer better value across the data tiers, and longer validity periods. For example, Asuer Connect and

Sakeng Mobile offer their new 30-day 1GB bundles at R 35 and R 40, while the standard prepaid 1GB offered by Cell C is priced at R 85, which is a R 50 (or 143%) and R 45 (or 113%) price differential, respectively.

4.3. Voice Services Market

- In the voice services market, the Authority did not receive any flat-rate tariffs in the period under review, and the prevailing prices can be found in the 2025/26 FY Q2 Bi-annual Tariff Analysis Report, which is available on ICASA's website.¹

4.4. Fibre Services Market

- The Authority continues to provide a comparative analysis of Fibre-to-the-Home (FTTH) packages provided on various 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 25/25Mbps and 50/50Mbps increased by R 1 to R 572.28 from the previous reporting period. On the other hand, the average subscription fees for the 50/50Mbps and 100/100Mbps decreased by R 1.46 and R 5.46 to R 778.61 and R 936.57, respectively. The slight changes in the average prices continue to suggest that the prices charged by operators tend to be normally distributed; therefore, most prices tend to converge towards the estimated average price of each line speed.
- 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

¹ Pages 57 – 58, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/2025-26-fy-q2-bi-annual-tariff-analysis-report> > Accessed 22 January 2026

largest below-average price deviation of 26.8%. Among the sampled fibre plans, MTN's 25/25Mbps package on Linteg has the highest subscription fee of R 759, which translates to the largest deviation above the average price of 33%.

- 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 33.2%. Cybersmart's 50/50Mbps package on Openserve has the highest subscription fee of R 1 059, which translates to the largest deviation above the average price of 36%.
- The average price of the sampled 100/100Mbps line speeds was R 936.57 per month, with Cybersmart's 100/100Mbps FTTH on Lightspeed's fibre network having the lowest subscription fee of R 573.85, which translates to the largest below-average price deviation of 38.7%. Vodacom's 100/100Mbps package on SADV has the highest subscription fee of R 1 259, which translates to the largest deviation above the average price of 34.4%.

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, Telkom Mobile, for example, introduced its WhatsApp and Plug'd Bundles consisting of all-net data, URL-specific data, and integrated bundles. For instance, they offer their Plug'd WhatsApp 1.5GB to customers at R 35.
- Vodacom and MTN introduced their URL Video Data Bundles and OneTV Bundles, which offer customers video bundles that are linked to specific OTT

platforms, respectively. These URL-specific data bundles benefit customers with affordable prices which translate to low in-bundle rates. For example, Vodacom's 1GB data bundle that gives you access to Showmax, DSTV Stream, Vuclip and Prime Video, is offered at R 10.

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

- The Authority also observed a continued competitiveness and innovation in the provision of 5G/LTE and Wireless Internet services, with 36 notifications received during the period under review.
- For instance, Cell C amended its Home LTE price plan in the period under review, wherein it significantly reduced the prices of existing LTE packages and introduced new ones with competitive prices. An example is the 50% price reduction of the Home LTE 400GB package to R 349, and the introduction of the Home LTE 1TB package at R 699.
- Vox Telecom, Telkom, and MTN also introduced their 25/10Mbps Air Fibre products on Frogfoot at R 435, R 449, and R 519, respectively.

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 that are prevailing in the market.
- The full Bi-annual Report on the analysis of Tariff Notifications submitted to ICASA for the Period 01 July 2025 to 31 December 2025 is available on ICASA's website.