



## **Independent Communications Authority of South Africa**

Independent Communications Authority of South Africa

350 Witch-Hazel Avenue, Eco Point Office Park

Eco Park, Centurion.

Private Bag X10, Highveld Park 0169

Telephone number: (012) 568 3000/1

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### **BI-ANNUAL REPORT ON THE ANALYSIS OF TARIFF NOTIFICATIONS SUBMITTED TO ICASA FOR THE PERIOD 01 JULY 2020 TO 31 DECEMBER 2020**

*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 regulations 4(3) and 4(4) of the Information and Communications Technology ("ICT") COVID-19 National Disaster Regulations, Government Gazette 43207. 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 ESSUC (2018) defines this rate as the price that an end user is charged upon depletion of the allocated bundle.
Post-paid Plan	The ESSUC (2018) defines this as a service in which an end-user pays monthly subscription and usage charges at the end of each month for the allocation of voice minutes, SMS and data services.
Prepaid Plan	The ITU (2010), defines this as a mobile cellular service in which a subscriber pays in advance for the allocation of voice minutes, SMS and data in fixed amounts.

## Executive Summary

The Independent Communications Authority of South Africa (ICASA, hereon referred to as 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 No. 36 of 2005 (ECA, as amended). This tariff analysis report aims to ensure that end-users (customers) are aware of the various prepaid retail tariffs in the telecommunications sector which were filed with the Authority during the period of 01 July 2020 to 31 December 2020<sup>1</sup>, as well as provide an update on initiatives which are currently underway to reduce the cost to communicate. This ensures that there is retail tariff transparency, which could potentially encourage competition as it is likely to minimise pricing and product information asymmetries in the sector.

Table 1 shows the types of notifications received in the period 01 July 2020 to 31 December 2020.

Table 1: Type of Notifications Received - 01 July 2020 to 31 December 2020

Notification Type	Cell C	MTN	MWEB	Telkom	Vodacom	OLOs	Grand Total
Amendment	28	20	14	8	20	13	103
Extension	17	14	-	2	4	-	37
New Product	8	29	1	1	11	10	60
Promotion	8	37	4	5	10	12	76
Termination	3	2	-	-	-	2	7
<b>Grand Total</b>	<b>64</b>	<b>102</b>	<b>19</b>	<b>16</b>	<b>45</b>	<b>37</b>	<b>283</b>

Source: ICASA Database based on Tariff Notifications

The Authority received a total of 283 tariff notifications, which included 76 new promotions, 103 amendments, 37 extensions, 60 new products and 7 terminations during the period under review, i.e. 01 July 2020 to 31 December 2020.

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

In the mobile data services market, salient changes were the amendment of the 30-day standard prepaid data bundles from Telkom Mobile. Telkom Mobile's amendment filed with the Authority on 08 September 2020 entailed an update of Telkom Mobile's 30-day All-Network Data Portfolio, offering customers more data value while the prices incurred a reduction. For instance, the Telkom Mobile replaced the 100MB data bundle with a 150MB data bundle which includes an additional 150MB night surfer bundle, priced at R 29, which is R 0.25 less than what it was previously charging for the 100MB bundle. Telkom Mobile's 1GB was previously priced at R 100 and it also had a R 1 price reduction as its now R 99 and it is now inclusive of an additional 1GB night surfer bundle, which gives customers more value for money.

FNB Connect also introduced its new daily and weekly data bundles and reduced its out-of-bundle (OOB) rates for prepaid and post-paid customers, which could exert competitive forces in the market, since some of the MVNOs prices are relatively lower when compared to the big four MNOs. For example, Vodacom and Cell C's weekly 1GB are priced at R 80 and R 65, respectively, while FNB Connect offers the same volume for R 53, saving customers R 27 (or 33.8%) and R 12 (or 18.5%). The MVNO's amendment to the OOB data rates was a R 0.10 (33.3%) reduction from R 0.30 per MB to R 0.20 per MB, is beneficial for their customers as they are now charged lower OOB rates per unit (MB) of data used. FNB Connect's new OOB data rate is R 0.29 (or 59.2%) less than Vodacom and MTN's, and R 0.90 (or 81.8%) less than Cell C's, and R 0.10 (33.3%) less than Telkom's OOB data rate.

The National State of Disaster is still in place and as such the ICT COVID-19 Regulations which prescribe minimum standards which licensees must follow during this period are still being enforced. There was an amendment of these Regulations during the period under review which was published on 27 November 2020. The amendment entailed an extension of the validity period of the temporary assignment of the temporary release of high demand spectrum (HDS) from 30 November 2020 to 31 March 2021. Also, licensees are now required to pay pro-rated radio frequency spectrum license fees, in terms of the Radio Frequency Spectrum License Fees Regulations, 2010, for the period 01 December 2020 to 31 March 2021.

In order to assist with reducing the impact of the pandemic on telecommunications services and lower costs to communicate, licensees have continued to introduce various promotional products and/or services in the period under review. For example, MTN introduced its University and TVET Bundle for NSFAS Student offer and the Unisa Students Offer. MTN's University and TVET Bundle for NSFAS Student offer comprises of 10GB Anytime data and 20GB Night-time express data recurring for three months at a price of R 65. The Unisa Students offer has 30-day integrated bundles, with one offering 5GB of data and 30 all-net voice minutes for R 49 and another offering 15GB and 60 all-net voice minutes for R 99. These are MTN's efforts to aid with the continuation of studying online during the COVID-19 pandemic period. MTN also introduced the COVID ALERT App Promotion, wherein it encourages more people to download the new Bluetooth contact-tracing App for COVID-19 by rewarding customers with a 1GB data bundle.

## 1. Introduction

In terms of the Standard Terms and Conditions for Individual Licences Regulations (*Government Gazette No. 33294*) of 2010 and End-user and Subscriber Service Charter Regulations (*Government Gazette No. 39898*) of 2016, as amended, individual licensees are required to file notifications of tariffs and promotional tariffs with the Authority, seven (7) days prior to launching them in the market. The analysis contained in this report is based on prepaid tariffs that were filed as in accordance to the aforementioned Regulations and also regulations 4(3) and 4(4) of the Information and Communications Technology ("ICT") COVID-19 National Disaster Regulations, *Government Gazette 43207* during the period of 01 July 2020 to 31 December 2020.

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 aligned to 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*" as it seeks to ensure that there is retail price transparency. This would enable customers to make an informed choice, in terms of tariff plan preferences and/or preferred service providers based on their different offerings.

This report provides an update of the 2020/21 FY second quarter (Q2) Tariff Analysis Report, and it also highlights changes and new prepaid standard and promotional mobile voice and data plans and tariffs and month-to-month (MtM) LTE, Wi-Fi and plans and monthly Fibre-to-the-home (FTTH) packages that were filed by the different Individual Licensees during the period under review.

This report is categorised into the following sections:

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

- Section 3 provides concluding remarks.

An overview of other<sup>2</sup> prepaid tariff notifications filed during the period under review is then depicted in Annexure A and it shows that there has been competition in terms of the promotions offered by the licensees in the market. Annexure B shows prepaid promotions and tariff plans which ended during the period under review.

## **2. Analysis of Tariffs Notified to the Authority**

There were mainly six 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;
- Promotional prepaid voice tariffs; and
- Standard prepaid integrated bundles.

The analysis of the standard and promotional prepaid data and voice tariffs is presented in sub-sections 2.1 to 2.5. Sub-section 2.6 looks at the standard and promotional prepaid integrated bundles. Sub-section 2.7 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 2.8.

### **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 preceding

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<sup>2</sup> Other prepaid tariff notifications filed or received during the period under review which were not discussed in the main part of this report and continue to exist in the market after 31 December 2020.

2020/21FY Q2 Bi-annual Tariff Analysis Report. Therefore, this sub-section is divided into two parts, i.e. 2.1.1.1, which shows the prepaid data prices for bundles offered by the MNOs and 2.1.1.2, which shows the prepaid data prices for bundles offered by MVNOs filed with the Authority in the period under review.

### **2.1.1.1. Prepaid Data Prices for bundles offered by MNOs**

#### **2.1.1.1.1. Prepaid 30-day validity period data bundle**

This section shows the prices for prepaid 30-day standard data bundle offers and provides a comparative analysis of these prepaid plans which are offered by Vodacom, MTN, Cell C and Telkom Mobile, collectively referred to as MNOs. Tables 2 and 3 indicate the difference in terms of absolute value (Variance in Rands) of the data charges in terms of in-bundle (i.e. labelled normal subscription fee) plans and out-of-bundle rates (OOB) of the same volume of data (i.e., the OOB equivalent price). Also shown in the tables are prices (tariff rate) of each megabyte per volume of data, i.e. the in-bundle rates. These tables also indicate and compare price changes, if any, from the previous prices found in the 2020/21 FY Q2 Bi-annual Tariff Analysis Report, which was published on ICASA's website on 12 January 2021<sup>3</sup>.

In the period under review, the Authority received an amendment notification with respect to 30-day standard prepaid data bundles from two MNOs, namely Vodacom and Telkom Mobile. Vodacom added the 50GB and 100GB bundles on its 30-day prepaid data bundles, priced at R 1 499 and R 2 399, respectively. Telkom Mobile's amendment entailed an update of Telkom Mobile's 30-day All-Network Data Portfolio.

Telkom Mobile filed its amendment notification on 08 September 2020, and table 3 below shows the data bundles. Telkom Mobile also introduced the 35MB, 75MB and 300MB priced at R 7, R 14 and R 49, respectively. The bundles replaced by the abovementioned data bundles are the 25MB, 50MB and 250MB data bundles.

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<sup>3</sup> Pages 19-20, available online at: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020> > Accessed on 20 January 2021

The price changes Telkom Mobile's prepaid 30-day data bundles for the 50GB and 100GB data bundles resulted in the 50GB price declining by R 316 or 17.4% from R 1 815 to R 1 499, while the price for the 100GB data bundle was reduced by R 728 or 22.6% from R 3 227 to R 2 499. It is also worth noting that data bundles from 35MB - 500MB and the 20GB and 50GB bundle can be rolled over for 6 months, while the roll over period for data bundles from 1GB - 10GB is 2 months. The 100GB data bundle has 12 months roll over period. Telkom Mobile's All-Network Data Portfolio (excluding the 20GB - 100GB bundles) include free Night Surfer bundles which deplete on data related activity from 00h00 to 07h00.

It should be noted that MTN and Cell C 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 2: Prepaid Data Bundle Standard Prices and OOB Equivalent Prices for Vodacom and MTN

Bundle Size (MB)	Vodacom				MTN			
	Current Normal Subscription Fee	OOB Equivalent Subscription Fee (R 0.49 per MB)*	Variance in Rands (OOB Equivalent v/s Subscription Fee)	Tariff rate per MB	Current Normal Subscription Fee	OOB Equivalent Subscription Fee (R 0.49 per MB)*	Variance in Rands (OOB Equivalent v/s Subscription Fee)	Tariff rate per MB
50	R 12	R 24.50	R 12.50	R 0.24	R 10 (40MB)	R 20	R 10	R 0.25
100	N/A				R 20	R 49	R 29	R 0.20
150	R 29	R 73.50	R 44.50	R 0.19	R 29	R 73.50	R 44.50	R 0.19
325	R 55	R 159.25	R 104.25	R 0.17	R 60 (350MB)	R 171.50	R 111.50	R 0.17
500	R 79	R 245	R 166	R 0.16	R 75	R 245	R 170	R 0.15
750	N/A				R 89	R 367.50	R 278.50	R 0.12
1024	R 99	R 501.76	R 402.76	R 0.10	R 99	R 501.76	R 402.76	R 0.10
1536	N/A				R 149	R 752.64	R 603.64	R 0.10
2048	N/A				R 189	R 1 003.52	R 814.52	R 0.09
3072	R 229	R 1 505.28	R 1 276.28	R 0.07	R 279	R 1 505.28	R 1 226.28	R 0.09
5120	R 349	R 2 508.80	R 2 159.80	R 0.07	N/A			
6144	N/A				R 399	R 3 010.56	R 2 611.56	R 0.06
10240	R 469	R 5 017.60	R 4 548.60	R 0.05	R 499	R 5 017.60	R 4 518.60	R 0.05
20480	R 699	R 10 035.20	R 9 336.20	R 0.03	R 899	R 10 035.20	R 9 136.20	R 0.04
51200	R 1 499	R 25 088	R 23 589	R 0.03	R 1 499	R 25 088	R 23 589	R 0.03
102400	R 2 399	R 50 176	R 47 777	R 0.02	R 2 499	R 50 176	R 47 677	R 0.02

\*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.

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

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

Bundle Size (MB)	Cell C				Telkom Mobile					
	Current Subscription Fee	OOB Equivalent Subscription Fee (R1.10/MB)	Variance in Rands (OOB Equivalent v/s Subscription Fee)	Tariff rate per MB	Previous (2018/19 FY Q2) Normal Subscription Fee	Current Subscription Fee	OOB Equivalent Subscription Fee (R 0.30/MB)	Variance in Rands (OOB Equivalent v/s Subscription Fee)	Variance (%) Previous v/s Current Subscription Fee	Tariff rate per MB
35	R 10 (40MB)	R 44	R 34	R 0.25	N/A	R 7**	R 10.50	R 3.50	N/A	R 0.20
75	R 15 (80MB)	R 88	R 73	R 0.19	N/A	R 14**	R 22.50	R 8.50	N/A	R 0.19
100	N/A				R 29.25	Discontinued				
150	R 29	R 165	R 136	R 0.19	N/A	R 29**	R 45	R 16	N/A	R 0.19
250	R 35	R 275	R 240	R 0.14	N/A					
300	R 49 (325MB)	R 358	R 309	R 0.15	N/A	R 49**	R 90	R 41	N/A	R 0.16
500	R 80 (800MB)	R 880	R 800	R 0.10	R 69.60	R 69**	R 150	R 81	-0.9%	R 0.14
1024	R 95**	R 1 126.40	R 1 031.40	R 0.09	R 100	R 99**	R 307.20	R 208.20	-1%	R 0.10
1536	R 149**	R 1 690.60	R 1 540.60	R 0.10	N/A					
2048	R 199**	R 2 253	R 2 053.80	R 0.10	R 140	R 139**	R 614.40	R 475.40	-0.7%	R 0.07
3072	R 249**	R 3 379.20	R 3 130.20	R 0.08	R 201	R 199**	R 921.60	R 722.60	-1%	R 0.06
5120	N/A				R 301	R 299**	R 1 536	R 1 237	-0.7%	R 0.06
6144	R 299**	R 6 758.40	R 6 459.40	R 0.05	N/A					
10240	R 499**	R 11 264	R 10 765	R 0.05	R 505	R 469**	R 3 072	R 2 603	-7.1%	R 0.05
20480	R 799	R 22 528	R 21 729	R 0.04	R 905	R 699	R 6 144	R 5 445	-22.8%	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 Tariff Notifications. N/A means not offered/cannot be calculated

Table 3 shows that Telkom Mobile has discontinued its 30-day standard prepaid 100MB data bundle and have replaced it with a 150MB data bundle, which is priced at R 29, this is lower by R 0.25 than what it was charging for the 100MB bundle. Telkom Mobile's price i.e. the R 29 for its 150MB data bundle, is equivalent to what other MNOs charge for the same data volume.

Telkom Mobile reduced its 30-day standard prepaid 500MB data bundle price by R 0.60 from R 69.60 to R 69, this price is R 10 or 12.7% and R 6 or 8% less than Vodacom and MTN, respectively. Cell C does not offer the 500MB data bundle, however it offers a 800MB data bundle for R 80.

In the period under review Telkom Mobile also reduced the price of its 30-day standard prepaid 1GB data bundle by R 1 (or 1%), from R 100 to R 99, thus charging the same as Vodacom and MTN. Cell C's 1GB data bundle remains the most affordable 1GB prepaid 30-day data bundle as its priced at R 95, which is R 4 cheaper than the other three MNOs.

During the period under review, Telkom Mobile also reduced its 30-day standard prepaid 2GB data bundle by R 1 from R 140 to R 139, making it the most affordable 2GB bundle amongst the MNOs who offer this bundle, followed by MTN at R 189, which is R 50 or 36% more and Cell C offers it at R 199 which is R 60 or 43.2% more.

Telkom Mobile decreased the price of its 30-day standard prepaid 5GB data bundle in the period under review by R 2 (0.7%) from R 301 to R 299, which resulted in Telkom Mobile's 5GB data bundle being the most affordable when compared to Vodacom, which charges R 349 i.e. is R 50 or 16.7% more. Cell C and MTN do not offer a 5GB prepaid 30-day data bundle, however they offer a 6GB prepaid 30-day data bundle for R 299 and R 399, respectively. Comparatively, this therefore means that Cell C charges the least among the operators, while giving customers more data volume, as its 6GB prepaid 30-day data bundle is priced lower than what others charge for a 5GB data bundle.

Telkom Mobile's 30-day standard prepaid 10GB also decreased by R 36 or 7.1%, from R 505 to R 469, which is the same as the price of Vodacom's 10GB data

bundle. This makes Vodacom and Telkom Mobile's 10GB the most affordable data bundles among the four MNOs, which are R 30 less than what MTN and Cell C charge. Telkom Mobile's price of the 20GB was also revised to R 699 which is equivalent to what Vodacom charges for the same data volume. This is R 100 and R 200 less than Cell C's and MTN's prices for the same volume of data, respectively.

Table 4 below shows a summary of the salient year-on-year changes that the Authority has observed for the standard 30-day prepaid data bundles between the 2019/20 FY and 2020/21 FY period.

A positive outlook is depicted by table 4 of how prices have relatively decline for some of the 30-day standard prepaid data bundles, over and above the 1GB data bundle which MTN, Vodacom and Cell C signed an agreement on with the Competition Commission following the Data Services Market Inquiry. Vodacom and MTN's 1GB data bundle had the largest tariff decline of 33.6%, with their in-bundle rates falling by 33.3%. However, it should be noted that Cell C offers the most affordable 1GB data bundle priced at R 95, with an in-bundle rate of R 0.09 per MB, which is R 0.01 (or 10%) less than MTN, Telkom Mobile and Vodacom's R 0.10 per MB.

Cell C, MTN, and Vodacom increased the data volumes of their 100MB data bundles by 50% to 150MB whilst keeping their prices unchanged at R 29, which was the largest data volume increase in percentage terms. Telkom Mobile also increased the data volume of its 100MB data bundles by 50% to 150MB and reduced the price by R 0.25, from R 29.25 to R 29. It is also worth noting that Cell C increased the data volume of its 2560MB (or 2.5GB) data bundle by 512MB to 3072MB whilst keeping its price unchanged at R 249, which was the largest data volume increase in absolute value terms.

Table 4: Salient Changes to Standard 30-day Prepaid Data Bundles

Licensee	2019/20 FY (Previous Q4 Bi-annual Tariff Analysis Report)	2020/21 FY (Current <sup>4</sup> Q4 Bi-annual Tariff Analysis Report)	Year-on-Year Changes
<b>Cell C</b>	100MB priced at R 29, with an in-bundle rate of R 0.29 per MB.	Introduced a 150MB data bundle for R 29, with an in-bundle rate of R 0.19 per MB.	50% more data volume → 34.5% less in-bundle rate.
	750MB priced at R 100, with an in-bundle rate R 0.13 per MB.	Introduced a 800MB data bundle for R 80, with an in-bundle rate of R 0.10 per MB.	6.7 % more data volume priced at 20% less → 23.1% lower in-bundle rate.
	1.5GB priced at R 149, with an in-bundle rate R 0.10 per MB.	Introduced a 1GB data bundle priced at R 95, with an in-bundle rate of R 0.09 per MB.	33.3% less data volume, priced at 36.2% less → 10% lower in-bundle rate.
	2.5GB priced at R 249, with an in-bundle rate R 0.10 per MB.	Introduced a 3GB data bundle for R 249, with an in-bundle rate of R 0.08 per MB.	20% more data volume → 20% lower in-bundle rate.
<b>MTN</b>	100MB priced at R 29, with an in-bundle rate of R 0.29 per MB.	Introduced a 150MB data bundle for R 29, with an in-bundle rate of R 0.19 per MB.	50% more data volume → 34.5% less in-bundle rate.
	600MB priced at R 99, with an in-bundle rate R 0.17 per MB.	Introduced a 500MB data bundle for R 75, with an in-bundle rate of R 0.15 per MB.	16.7% less data volume, priced at 24.2% less → 11.76% lower in-bundle rate.
	750MB priced at R 120, with an in-bundle rate R 0.16 per MB.	Reduced the price of 750MB data bundle to R 89, which lowered the in-bundle rate to R 0.12 per MB.	Priced at 25.8% less → 25% lower in-bundle rate.
	1GB priced at R 149, with an in-bundle rate R 0.15 per MB.	Reduced the price of 1GB data bundle to R 99, which lowered the in-bundle rate to R 0.10 per MB.	Priced at 33.6% less → 33.3% lower in-bundle rate.
	3GB priced at R 299, with an in-bundle rate R 0.10 per MB.	Reduced the price of 3GB data bundle to R 279, with a new in-bundle rate of R 0.09 per MB.	Priced at 6.7% less → 10% lower in-bundle rate.
<b>Telkom Mobile</b>	100MB priced at R 29.25, with an in-bundle rate of R 0.29 per MB.	Introduced a 150MB data bundle for R 29, with an in-bundle rate of R 0.19 per MB.	50% more data volume priced at 0.9% less → 34.5% less in-bundle rate.

<sup>4</sup> Q4 (quarter 4) is as per the review period for the production and publication of this report, so changes are as at 31 December 2020 and not aligned to the financial year end which is 31 March 2021.

	500MB priced at R 69.60, with an in-bundle rate R 0.14 per MB.	Reduced the price of 500MB data bundle to R 69, the in-bundle rate remained unchanged.	Priced at 0.9% less.
	1GB priced at R 100, with an in-bundle rate R 0.10 per MB.	Reduced the price of 1GB data bundle to R 99, the in-bundle rate remained unchanged.	Priced at 1% less.
	3GB priced at R 201, with an in-bundle rate R 0.07 per MB.	Reduced the price of 3GB data bundle to R 199, which lowered the in-bundle rate to R 0.06 per MB.	Priced at 1% less → 14.3% lower in-bundle rate.
	10GB priced at R 505, with an in-bundle rate R 0.05 per MB.	Reduced the price of the 10GB data bundle to R 469, the in-bundle rate remained unchanged.	Priced at 7.1% less.
	20GB priced at R 905, with an in-bundle rate R 0.04 per MB.	Reduced the price of 20GB data bundle to R 699, which lowered the in-bundle rate to R 0.03 per MB.	Priced at 22.8% less → 25% lower in-bundle rate.
<b>Vodacom</b>	100MB priced at R 29, with an in-bundle rate of R 0.29 per MB.	Introduced a 150MB data bundle for R 29, with an in-bundle rate of R 0.19 per MB.	50% more data volume → 34.5% less in-bundle rate.
	500MB priced at R 100, with an in-bundle rate R 0.20 per MB.	Reduced the price of 500MB data bundle to R 79, which lowered the in-bundle rate to R 0.16 per MB.	Priced at 21% less → 20% lower in-bundle rate.
	1GB priced at R 149, with an in-bundle rate R 0.15 per MB.	Reduced the price of 1GB data bundle to R 99, which lowered the in-bundle rate to R 0.10 per MB.	Priced at 33.6% less → 33.3% lower in-bundle rate.
	3GB priced at R 299, with an in-bundle rate R 0.10 per MB.	Reduced the price of the 3GB data bundle to R 229, which lowered the in-bundle rate to R 0.07 per MB.	Priced at 23.4% less → 30% lower in-bundle rate.
	10GB priced at R 605, with an in-bundle rate R 0.06 per MB.	Reduced the price of the 10GB data bundle to R 469, which lowered the in-bundle rate to R 0.05 per MB.	Priced at 22.5% less → 16.7% lower in-bundle rate.
	20GB priced at R 1 010, with an in-bundle rate R 0.05 per MB.	Reduced the price of the 20GB data bundle to R 699, which lowered the in-bundle rate to R 0.03 per MB.	Priced at 30.8% less → 40% lower in-bundle rate.

Source: ICASA Database based on Tariff Notifications

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

### 2.1.1.1.2.1. MTN Personalised EverydayGigs Regional Offers

MTN initially filed its Personalised EverydayGigs Regional Offers with the Authority on 03 July 2020, which targets specific customers by offering bundles based on their geographic location (towns and suburbs). The operator also filed additional bundles under the Personalised EverydayGigs Regional Offers on 10 July 2020, 26 August 2020, 17 November 2020 and 10 December 2020. The price plan allows customers to pay an up-front payment for the daily (1 day), weekly (7 days) or monthly (30 days) bundles and the bundles are allocated as per the customers' options. Customers who select the weekly and monthly bundles are allocated data every day, however each daily allocation is valid for use on that same day.

Table 5 below shows a sample of the bundles in the Personalised EverydayGigs Regional Offers.

Table 5: MTN Personalised EverydayGigs Regional Bundles

MTN Personalised EverydayGigs Regional Offers	Validity	Inclusive Bundle Value	Total Data Allocation	Price (Incl. VAT)
EverydayGigs/MyTownGigs offer -Daily 1GB	Daily	1GB once-off	1GB	R 19
EverydayGigs/MyTownGigs offer -Daily 2GB	Daily	2GB once-off	2GB	R 29
EverydayGigs/MyTownGigs offer -Weekly 1GB	Weekly	1GB x 7 days	7GB	R 99
EverydayGigs/MyTownGigs offer -Weekly 2GB	Weekly	2GB x 7 days	14GB	R 149
EverydayGigs/MyTownGigs offer -Monthly 1GB	Monthly	1GB x 30 days	30GB	R 279
EverydayGigs/MyTownGigs offer -Monthly 2GB	Monthly	2GB x 30 days	60GB	R 499

Source: ICASA Database based on Tariff Notifications

The Personalised EverydayGigs Regional Offers benefit customers with product variety in accordance to their data usage patterns. For example, instead of purchasing a 30-day 1GB bundle for R 99, customers who use high data volumes can opt for the EverydayGigs weekly 1GB, which offers a total of 7GB for R 99.

More information regarding this offer and its terms and conditions can be obtained from the operator’s website<sup>5</sup>. MTN introduced the Personalised EverydayGigs Regional Offers in the market on 07 July 2020.

### **2.1.1.1.2.2. Cell C 7-day Data Bundles**

Cell C’s 7-Day Data Bundles Plan was filed with the Authority on 21 July 2020, comprising of the 7-Day Bundle standard plan and a 7-Day WhatsApp Booster promotion. This new plan replaced Cell C’s 5-Day bundles plan and it is available to all prepaid, post-paid and top-up/hybrid customers.

Table 6 below shows the prices for Base 7-Day data bundles, as well as those for the WhatsApp Booster 7-Day promotional bundles which customers will be eligible to purchase, as an add-on subject to having purchased an equivalent Base 7-Day bundle.

Table 6: Cell C 7-Day Bundle Plans

Base 7-Day Bundle			WhatsApp Booster 7-day Promotional Bundle		
	Price	Tariff rate per MB		Price	Tariff rate per MB
<b>60MB</b>	R 10	R 0.17	<b>60MB</b>	R 3	R 0.05
<b>150MB</b>	R 15	R 0.10	<b>150MB</b>	R 6	R 0.04
<b>250MB</b>	R 25	R 0.10	<b>250MB</b>	R 9	R 0.04
<b>500MB</b>	R 45	R 0.09	<b>500MB</b>	R 16	R 0.03
<b>1GB</b>	R 65	R 0.06	<b>500MB</b>	R 16	R 0.03
<b>2GB</b>	R 95	R 0.05	<b>500MB</b>	R 16	R 0.03

Source: ICASA Database based on Tariff Notifications

Cell C’s 7-day data bundles can be transferred to other customers who are on Cell C’s network as per the data transfer terms and conditions on Cell C’s website<sup>6</sup>. Cell C’s 7-Day data bundles and the WhatsApp Booster 7-day bundle promotion were introduced in the market on 31 July 2020, with the WhatsApp Booster 7-day promotion which was initially due to end on 28 February 2021, however on 23 February 2021, Cell C filed an extension for this promotion, with the revised end date being 30 June 2021.

<sup>5</sup> Available online at: < <https://www.mtn.co.za/Pages/everyday-gigs.aspx> > Accessed on 18 January 2021.

<sup>6</sup> Available on: < <https://www.cellc.co.za/cellc/bundles-contract-detail/seven-day-bundles#/additional-info-content> > Accessed 02 February 2021.



**2.1.1.1.2.3. Rain Unlimited Off-Peak for Phones and Unlimited 4G 24/7 for Phones**

Rain filed its Unlimited Off-Peak for Phones and Unlimited 4G 24/7 for Phones with the Authority on 24 July 2020. These plans are only available on mobile phones. The Unlimited Off-Peak for Phones plan is offered on a MtM contract on any smartphones for R 179 per month and offers customers unlimited data during off-peak hours from 23h00 to 18h00 (19 hours). Rain charges R 50 per gigabyte of data used during peak hours (i.e. from 18h01 to 22h59).

The Unlimited 4G 24/7 for Phones plan offers unlimited data usage on a MtM contract for R 379 per month. These plans were introduced in the market on 27 July 2020.

**2.1.1.1.2.4. Vodacom Double Your Data (100% Free Bonus Data Bundles)**

Vodacom’s Double Your Data plan was initially filed with the Authority on 17 February 2020 as a promotional offer, bearing the name “Vodacom 100% Free Bonus Data Bundles”. On 10 June 2020, Vodacom made these bundles permanent and filed another notification which renamed the plan as “Vodacom Double Your Data” on 17 July 2020. On 04 August 2020, Vodacom added new data packages on this plan. The plan rewards customers with double data at discounted prices on selected data bundles. These bundles are available on Vodacom’s Just 4 You and open market platforms, to all Vodacom prepaid, hybrid and post-paid customers.

Table 7 below shows the Double Your Data plan in detail.

*Table 7: Vodacom Double Your Data*

<b>Bundle</b>	<b>Validity</b>	<b>Price</b>	<b>Total Data Allocation</b>
15MB+15MB Free for the next 60 minutes at R 4	1 Hour	R 4	30MB
50MB+50MB Free for the next 60 minutes at R 5	1 Hour	R 5	100MB
250MB+250MB Free for the next 60 minutes at R 6	1 Hour	R 6	500MB
500MB+500MB Free for the next 60 minutes at R 8	1 Hour	R 8	1GB

25MB+25MB Free at R 5.50 (today)	1 Day	R 6	50MB
50MB+50MB Free at R 8 (today)	1 Day	R 8	100MB
100MB+100MB Free at R 15 (today)	1 Day	R 15	200MB
250MB+250MB Free at R 27 (today)	1 Day	R 27	500MB
1GB+1GB Free at R 29 (today)	1 Day	R 29	2GB
1.5GB+1.5GB Free at R 36 (today)	1 Day	R 36	3GB
15MB+15MB Free at R 6 (7 days)	7 Days	R 6	30MB
50MB+50MB Free at R 11 (7 days)	7 Days	R 11	100MB
125MB+125MB Free at R 20 (7 days)	7 Days	R 20	250MB
250MB+250MB Free at R 35 (7 days)	7 Days	R 35	500MB
500MB+500MB Free at R 60 (7 days)	7 Days	R 60	1GB
1GB+1GB Free at R 80 (7 days)	7 Days	R 80	2GB
2GB+2GB Free at R 120 (7 days)	7 Days	R 120	4GB
3GB+3GB Free at R 160 (7 days)	7 Days	R 160	6GB
5GB+5GB Free at R 240 (7 days)	7 Days	R 240	10GB
25MB+25MB Free at R 9 (30 days)	30 Days	R 9	50MB
75MB+75MB Free at R 16 (30 days)	30 Days	R 16	150MB
125MB+125MB Free at R 25 (30 days)	30 Days	R 25	250MB
250MB+250MB Free at R 39 (30 days)	30 Days	R 39	500MB
500MB+500MB Free at R 79 (30 days)	30 Days	R 79	1GB
650MB+650MB Free at R 85 (30 days)	30 Days	R 85	1.3GB
900MB+900MB Free at R 95 (30 days)	30 Days	R 95	1.8GB
<b>1GB+1GB Free at R 99 (30 days)</b>	<b>30 Days</b>	<b>R 99</b>	<b>2GB</b>
1.5GB+1.5GB Free at R 129 (30 days)	30 Days	R 129	3GB
2GB+2GB Free at R 159 (30 days)	30 Days	R 159	4GB
2.5GB+2.5GB Free at R 189 (30 days)	30 Days	R 189	5GB
5GB+5GB Free at R 349 (30 days)	30 Days	R 349	10GB
10GB+10GB Free at R 469 (30 days)	30 Days	R 469	20GB
375MB+375MB Free at R63 (30 days)	30 Days	R 63	750MB
750MB+750MB Free at R 89 (30 days)	30 Days	R 89	1.5GB

Source: ICASA Database based on Tariff Notifications

Vodacom's Double Your Data benefits and rewards customers as it effectively means that they pay same price they would have had to for a particular volume of data yet receive double the data bundle. For instance, as shown in table 7 above a 1GB data prepaid 30-day data bundle is priced at R 99, however with this plan customers would get an additional 1GB for free, which in total means the customer will be allocated 2GB of data.

Double Your Data bundles can be transferred to other customers on the Vodacom network as per the data transfer terms and conditions on Vodacom's website<sup>7</sup>. The validity periods of the bonus data is either 1 hour, 1 day, 7 days, 14 days or 30 days, which is subjected to being extended provided that a customer purchases another bundle of the same size and validity while the initial Double Your Data bundle has not been depleted.

The last amendment of this plan came to effect on 05 August 2020.

<sup>7</sup> Available on: < <https://www.vodacom.co.za/vodacom/terms/data-bundle-terms/data-transfer> > Accessed 24 January 2021.

### 2.1.1.1.2.5. MTN Personalised Data Bundles

On 28 August 2020, MTN filed an amendment<sup>8</sup> of its Personalised Data Bundles with the Authority whereby new weekly and monthly data bundles were added. This price plan offers open market data bundles in accordance to the customers' spending patterns. The operator has added new weekly and monthly data bundles in the suite. Table 8 below shows the new weekly and monthly data bundles.

Table 8: MTN Personalised Data Bundles Data Bundle Offers

Personalised open market weekly and monthly-Data Bundle offers	Validity	Price (Incl. VAT)	In-bundle Rate (Rand per MB)
MTN CVM Weekly -50MB	Weekly	R 10	R 0.20
MTN CVM Weekly -70MB	Weekly	R 12	R 0.17
MTN CVM Weekly -100MB	Weekly	R 12	R 0.12
MTN CVM Weekly -100MB	Weekly	R 15	R 0.15
MTN CVM Weekly -120MB	Weekly	R 17	R 0.14
MTN CVM Weekly -200MB	Weekly	R 25	R 0.13
MTN CVM Weekly -350MB	Weekly	R 40	R 0.11
MTN CVM Weekly -500MB	Weekly	R 55	R 0.11
MTN CVM Monthly - 40MB	Monthly	R 5	R 0.13
MTN CVM Monthly - 40MB	Monthly	R 10	R 0.25
MTN CVM Monthly - 100MB	Monthly	R 10	R 0.10
MTN CVM Monthly - 100MB	Monthly	R 15	R 0.15
MTN CVM Monthly - 150MB	Monthly	R 20	R 0.13
MTN CVM Monthly - 150MB	Monthly	R 25	R 0.17
MTN CVM Monthly - 200MB	Monthly	R 25	R 0.13
MTN CVM Monthly - 200MB	Monthly	R 29	R 0.15
MTN CVM Monthly - 200MB	Monthly	R 35	R 0.18
MTN CVM Monthly - 200MB	Monthly	R 39	R 0.20
MTN CVM Monthly - 350MB	Monthly	R 39	R 0.11
MTN CVM Monthly - 350MB	Monthly	R 55	R 0.16
MTN CVM Monthly - 350MB	Monthly	R 60	R 0.17
MTN CVM Monthly - 500MB	Monthly	R 60	R 0.12
MTN CVM Monthly - 500MB	Monthly	R 75	R 0.15
MTN CVM Monthly - 750MB	Monthly	R 89	R 0.12
MTN CVM Monthly - 1024MB	Monthly	R 89	R 0.09
MTN CVM Monthly - 1524GB	Monthly	R 149	R 0.10
MTN CVM Monthly - 2048GB	Monthly	R 149	R 0.07
MTN CVM Monthly - 2048GB	Monthly	R 169	R 0.08

Source: ICASA Database based on Tariff Notifications

It can be deduced from table 8 above that MTN's Personalised Data Bundles offer value for money given their low in-bundle rates. Instead of using data services without a data bundle and being charged the OOB data rate of R 0.49, customers can save at least R 0.24 per MB, with the highest in-bundle rate of R 0.25 per MB

<sup>8</sup> The MTN Personalised Data Bundles plan was initially filed with the Authority on 04 December 2019.

which is charged on the monthly 40MB priced at R 10. Upon depletion of the data bundle(s), the applicable OOB data tariff applies provided that a customer has opted-in to OOB data billing.

MTN’s additional Personalised Data Bundles were introduced in the market on 01 September 2020.

### **2.1.1.1.2.6. MTN Personalised EverydayGigs Offer**

MTN filed an amendment to its Personalised EverydayGigs Bundles with the Authority on 09 September 2020, wherein it added new bundles in the EverydayGigs suite. The prepaid EverydayGigs Bundles were initially filed with the Authority on 20 May 2020. The price plan allows customers to pay a certain amount of money up-front, per week or per month in exchange for a weekly or monthly data allocation which occurs every day, however each daily allocation is valid for use on that same day<sup>9</sup>. Table 9 below shows a sample of Personalised EverydayGigs Bundles.

Table 9: Sample of MTN’s Personalised EverydayGigs Bundles

<b>MTN EverydayGigs Bundles</b>	<b>Inclusive Value</b>	<b>Total Data Allocation</b>	<b>Price (Incl. VAT)</b>
MTN Everyday Gigs -Daily 100MB	100MB	100MB	R 10
MTN Everyday Gigs -Daily 500MB	500MB	500MB	R 20
MTN Everyday Gigs -Daily 1GB	1GB	1GB	R 25
MTN Everyday Gigs -Daily 2GB	2GB	2GB	R 39
MTN Everyday Gigs -3 Days 100MB	100MB x 3days	300MB	R 25
MTN Everyday Gigs -3 Days 500MB	500MB x 3days	1500MB	R 49
MTN Everyday Gigs -3 Days 1GB	1GB x 3days	3GB	R 60
MTN Everyday Gigs -3 Days 2GB	2GB x 3days	6GB	R 99
MTN Everyday Gigs -Weekly 100MB	100MB x 7days	700MB	R 49
MTN Everyday Gigs -Weekly 500MB	500MB x 7days	3500MB	R 69
<b>MTN EverydayGigs Bundles</b>	<b>Inclusive Value</b>	<b>Total Data Allocation</b>	<b>Price (Incl. VAT)</b>
MTN Everyday Gigs -Weekly 1GB	1GB x 7days	7GB	R 99
MTN Everyday Gigs -Weekly 2GB	2GB x 7days	14GB	R 129
MTN Everyday Gigs -Monthly 100MB	100MB x 30 days	3000MB	R 79
MTN Everyday Gigs -Monthly 100MB	100MB x 30 days	3000MB	R 99
MTN Everyday Gigs -Monthly 100MB	100MB x 30 days	3000MB	R 149
MTN Everyday Gigs -Monthly 500MB	500MB x 30 days	15000MB	R 179
MTN Everyday Gigs -Monthly 1GB	1GB x 30 days	30GB	R 299
MTN Everyday Gigs -Monthly 2GB	2GB x 30 days	60GB	R 399

Source: ICASA Database based on Tariff Notifications

<sup>9</sup> Additional information regarding the Personalised EverydayGigs suite is available online at: < <https://www.mtn.co.za/Pages/everyday-gigs.aspx> > Accessed on 20 January 2021

MTN's Everyday Gigs bundles gives customers more product choice/variety in the market. Similar to MTN, Vodacom<sup>10</sup> offers its Connected Every Day<sup>11</sup> 100MB bundle recurring for 3 days for R 19. MTN offers its 3 days Everyday Gigs for R 25, which R 6 more than what Vodacom offers for a similar bundle. Vodacom's weekly 1GB Connected Every Day bundle for R 149 offers customers 1GB per day for 7 days, while MTN offers its 1GB weekly Everyday Gigs bundle for R 99, thus saving customers R 50 in comparison to its counterpart.

MTN filed the amendment its Personalised EverydayGigs Bundles with respect to the ICT COVID-19 National Disaster Regulations, therefore it came to effect on 11 September 2020.

#### **2.1.1.1.2.7. Vodacom Always Connected Bundles**

Vodacom filed its Always Connected Bundles service with the Authority on 11 November 2020 wherein its prepaid and hybrid customers are offered the Power Hour voice minutes and 60MB data for R 8 and R 9, respectively. Purchasing the Always Connected Bundle results in customers being opted into the Always Connected Bundle service. Vodacom deducts the cost of the bundle from the customers' airtime and the initial bundle is allocated to them immediately. Once customers have been opted into the Always Connected Service, the subsequent bundles will be auto allocated when they do not have any data or voice bundles present and they initiate a session (data or voice), depending on the bundle that they had initially subscribed to. Therefore, customers subscribed to the Always Connected Bundles service are not charged for any OOB data usage as the service auto-allocates data when it is required. The \*135\*6# USSD code can be used to opt out of the Always Connected service.

Any manually allocated data/voice minutes are valid until 23h59 of the same day of allocation. However, data auto allocated after 21h00 is valid until 23h59 of the

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<sup>10</sup> It should be noted that Vodacom offers tailor-made data bundles recurring for either 3, 7 or 30 days. The pricing of the bundles is dynamic/in accordance to the customers spend profile.

<sup>11</sup> Filed with the Authority on 29 June 2020, and can be found on the 2020/21 FY Q2 Bi-Annual Tariff Analysis Report on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020> > Accessed on 15 February 2021

next day. Vodacom introduced its Always Connected Bundles in the market on 12 November 2020.

### **2.1.1.1.2.8. Cell C Upfront Payment Bundles and Double Data Promotion**

Cell C's Upfront Payment bundles and Double Data Promotion was filed with the Authority on 11 November 2020. The Upfront Payment Data bundles are available to prepaid, post-paid and top-up customers for a once-off fee and they include the allocation of data every 30 days over 12 instalments. Table 10 below, shows pricing and data allocation details of Cell C's Upfront Payment bundles.

*Table 10: Cell C Upfront Payment Bundles and Double Data Promotion*

<b>Standard Data Allocation per month</b>	<b>Price</b>	<b>Effective Price per month</b>	<b>In-bundle rate on Standard Data Allocation over 12 Months</b>	<b>Launch Promotion Free Double Data</b>	<b>Total data allocation (over 12 months)</b>	<b>In bundle rate on Standard + Promotional Data Allocation over 12 Months</b>
100MB	R 129	R 11	R 0.11	100MB	2.4GB	R 0.05
200MB	R 199	R 17	R 0.08	200MB	4.8GB	R 0.04
500MB	R 399	R 33	R 0.07	500MB	12GB	R 0.03
1GB	R 799	R 67	R 0.07	1GB	24GB	R 0.03
2GB	R 1 299	R 108	R 0.05	2GB	48GB	R 0.03

*Source: ICASA Database based on Tariff Notifications*

The total data allocated as shown in Table 10 above indicates that customers who subscribe or take up the offer of Cell C's Upfront Payment Bundle, before the end date (31 March 2021) of the Double Data promotion receive double the data volume for the duration of the plan. For example, after 31 March 2021<sup>12</sup>, a customer who purchased a 1GB via the Cell C Upfront Payment plan, would get allocated 1GB for a period of 12 months, priced at R 799 or R 67 per month, which translates to an in-bundle rate of R 0.07 per MB, however during the promotional period the customer would be allocated 2GB per month (a total of 24GB in the 12 months periods) for the same price, which reduces the in-bundle rate to R 0.03

<sup>12</sup> The promotional period ends on 31 March 2021, initially it was to end 31 January 2021, however an extension was filed on 21 January 2021.

per MB. Purchasing a 1GB data bundle using the Upfront Payment plan is more cost-effective, since its 29% cheaper, than buying the standard 30-day 1GB prepaid data bundle which is priced at R 95 and has an in-bundle rate of R 0.09 per MB.

The inclusive data offered on the Upfront Payment Data bundles can be transferred using the Cell C data transfer service. The standard inclusive data and free promotion data are carried over once and only for a period of 30 days, meaning that data does not roll over indefinitely. The Upfront Payment Data bundles plan and the Double Data promotion became effective on 16 November 2020 for prepaid, post-paid and top-up customers.

#### **2.1.1.1.2.9. MTN One Time Bundles**

MTN filed the amendment to its One Time Bundles with the Authority on 18 November 2020. The amendment entailed an addition of new One Time Bundles in the price plan. The plan offers prepaid and post-paid customers monthly allocated data bundles that can be purchased on a once-off basis. MTN's One Time Bundles can be rolled over but limited to twice the recurring value. Table 11 below details MTN's One Time Bundles and their respective prices.

*Table 11: MTN One Time Bundles*

<b>MTN One Time Data bundle</b>	<b>Validity</b>	<b>Inclusive MB value *months</b>	<b>Price (Incl. VAT)</b>
100MB Bundle for 3 months	Monthly	100MB x 3	R 33
300MB Bundle for 3 months	Monthly	300MB x 3	R 89
500MB Bundle for 3 months	Monthly	500MB x 3	R 129
1GB Bundle for 3 months	Monthly	1GB x 3	R 239
2GB Bundle for 3 months	Monthly	2GB x 3	R 419
5GB Bundle for 3 months	Monthly	5GB x 3	R 899
100MB Bundle for 6 months	Monthly	100MB x 6	R 59
100MB Bundle for 12 months	Monthly	100MB x 12	R 99
300MB Bundle for 6 months	Monthly	300MB x 6	R 159
300MB Bundle for 12 months	Monthly	300MB x 12	R 249
500MB Bundle for 6 months	Monthly	500MB x 6	R 229
500MB Bundle for 12 months	Monthly	500MB x 12	R 349
1GB Bundle for 6 months	Monthly	1GB x 6	R 419
1GB Bundle for 12 months	Monthly	1GB x 12	R 599
2GB Bundle for 6 months	Monthly	2GB x 6	R 699
2GB Bundle for 12 months	Monthly	2GB x 12	R 999

5GB Bundle for 6 months	Monthly	5GB x 6	R 1 399
5GB Bundle for 12 months	Monthly	2GB x 12	R 1 999

Source: ICASA Database based on Tariff Notifications

MTN's One Time Bundles is similar to Cell C's Upfront Payment Bundles (discussed in 2.1.1.1.2.8 above), which means more product choice for customers. For example, MTN's 1GB One Time package is priced at R 599 while Cell C's 1GB Upfront Payment Bundle is offered to customers for R 799<sup>13</sup>, which is R 200 more than what MTN charges for the equivalent data volume.

The amendment was filed using the ICT COVID-19 National Disaster Regulations (Government Gazette No. 43207) and it therefore came into effect on 20 November 2020.

#### **2.1.1.2. Standard Prepaid Data Prices for bundles offered by Mobile Virtual Network Operators (MVNOs)**

This section looks at Mobile Virtual Network Operators (MVNOs) who filed mobile data packages filed with the Authority in the period under review. Only FNB Connect filed its prepaid data prices and an amendment of its OOB rate in the period under review, which are discussed in the sub-sections below.

##### **2.1.1.2.1. FNB Connect Packages (Prepaid Retail and Business)**

The amendment of the FNB Connect Packages (Prepaid Retail and Business) was filed with the Authority on 30 July 2020. The amendment entailed the inclusion of a R 55 once-off SIM fee for retail customers when they buy a retail prepaid SIM starter pack in any FNB branch, which entitles them to a once-off allocation of 1GB anytime data and 30 any-network minutes. Business prepaid customers are charged a once-off fee of R 49 and they receive a once-off allocation of 1GB anytime data and 30 any network minutes.

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<sup>13</sup> It should be noted that whilst the Cell C 1GB for 12 months data bundle in the Upfront Payment Plan is relatively priced higher than MTN's One Time plan for same bundle, Cell C is running a double data allocation promotion on its Upfront Payment Bundles, which means that customers who take up their Upfront Payment plan qualify for 2GB data bundle allocation for 12 months, subject to them signing up before 31 March 2021, as the Double Data promotion will end on that date.



Table 12 below details FNB Connect Packages (Prepaid Retail and Business) data packages and their respective prices.

Table 12: FNB Connect Package (Prepaid and Business)

Retail Plan			
Package	Voice (Minutes)	Data	Price (Once-Off)
Connect Prepaid X	30	1GB	R 55
Business Package			
Package	Voice (Minutes)	Data	Price (Once-Off)
Connect SME Prepaid X	30	1GB	R 49

Source: ICASA Database based on Tariff Notifications

The amendments were effective from 17 August 2020.

#### 2.1.1.2.2. FNB Connect Out-of-Bundle Rates

Cell C filed FNB Connect's Out-of-Bundle Rates with the Authority on 30 September 2020, wherein it amended the OOB data rate for prepaid, post-paid and top-up plans, by reducing them from R 0.30 to R 0.20. This is a decline of R 0.10 or 33.3% for all plans. Compared to its counterparts, FNB Connect charges R 0.29 (or 61.2%), R 0.30 (or 60%) and R 0.31 (or 58.8%) less than Bayede Mobile, Nine Nine tariff plan 1 and Standard Bank Mobile which charge OOB rates of R 0.49, R 0.50 and R 0.51 per MB respectively. However, there are other MVNOs which have OOB rates that are lower than FNB Connect's, for example, Nine Nine tariff plan 2 and Sakeng Mobile's Community tariff plan offer OOB data rates of R 0.12 and R 0.14 per MB, which are R 0.18 (or 40%) and R 0.16 (or 46.7%) per MB less than what FNB Connect charges, respectively.

When compared to the MNOs, FNB Connect's new OOB data rate is R 0.29 (or 59.2%) less than Vodacom and MTN's, and R 0.90 (or 81.8%) less than Cell C's, and R 0.10 (33.3%) less than Telkom's OOB data rate. FNB Connect's amendment of its OOB data rate came to effect on 12 October 2020.

### 2.1.1.2.3. FNB Connect Daily and Weekly Data Bundles

FNB Connect’s Daily and Weekly Data Bundles were filed with the Authority on 30 September 2020. FNB Connect added new daily and weekly data bundles as detailed in Table 13 below.

Table 13: FNB Connect Daily and Weekly Data Bundles

Data Bundles	Price	Tariff Rate per MB
25MB 1 Day	R 4	R 0.16
50MB 1 Day	R 7	R 0.14
100MB 1 Day	R 11	R 0.11
250MB 1 Day	R 19	R 0.08
500MB 1 Day	R 29	R 0.06
1GB 1 Day	R 39	R 0.04
50MB 7 Days	R 9	R 0.18
100MB 7 Days	R 15	R 0.15
250MB 7 Days	R 25	R 0.10
500MB 7 Days	R 35	R 0.07
1GB 7 Days	R 53	R 0.05
2GB 7 Days	R 99	R 0.05

Source: ICASA Database based on Tariff Notifications

FNB Connect’s daily and weekly data bundles benefits customers with more affordable data bundles. For example, Vodacom, Telkom Mobile and Cell C’s weekly 1GB are priced at R 80, R 75 and R 65, respectively, while FNB Connect offers customers 1GB of data for R 53, which saves FNB Connect customers R 27 (or 33.8%), R 22 (or 29.3%) and R 12 (or 18.5%).

The in-bundle rates of FNB Connect Daily and Weekly Data Bundles are relatively lower than the MVNO’s OOB rate of R 0.20 per MB, which was discussed above in 2.1.1.2.2. For example, on the 25MB 1 Day data bundle at the in-bundle rate is R 0.16 which means a customer who buys this bundle would save R 0.04 or pay 20% less, than what they would if they used Internet services, without a bundle and paid the OOB rate. On the bigger data bundle packages, the in-bundle rate savings are more, for example the 1GB 1 Day data bundle has an in-bundle rate of R 0.04 per MB, which means that there is a saving of R 0.16 or 81% which customers would accrue by purchasing this bundle instead of using data services out of bundle as they would pay R 0.20 per MB.

The FNB Connect Weekly Data Bundles were made available in the market on 12 October 2020.

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

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

#### 2.1.1.3.1. Daily and Weekly Data Bundles

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

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

Table 14 below compares daily and weekly data bundles offered by Cell C, MTN, Telkom Mobile, Vodacom and FNB Connect, while table 15 shows the in-bundle rates of the daily and weekly bundles which are on table 14.

Table 14: Standard Daily and Weekly Data Bundles

Data Volume	Operators' Prices				
	Cell C	MTN	Telkom Mobile	Vodacom	FNB Connect
<b>Daily Data Bundles</b>					
<b>25MB</b>	R 4	R 5	N/A	R 5 (20MB)	R 4
<b>30MB</b>	N/A	N/A	R 5	N/A	N/A
<b>50MB</b>	R 9 (65MB)	R 8.50	N/A	R 9 (60MB)	R 7
<b>100MB</b>	R 14 (120MB)	R 15 (120MB)	R 10.50 (150MB)	R 15	R 11
<b>250MB</b>	N/A	R 27 (300MB)	R 20 (300MB)	R 27	R 19
<b>500MB</b>	R 17	N/A	N/A	N/A	R 29
<b>1GB</b>	R 20	R 50	N/A	N/A	R 39
<b>Weekly Data Bundles</b>					
<b>50MB</b>	R 10 (60MB)	R 10	R 5	N/A	R 9

<b>100MB</b>	R15 (150MB)	R 15	R 15	R 17	R 15
<b>250MB</b>	R 25	R 25 (200MB)	R 30	R 35	R 25
<b>500MB</b>	R 45 (500MB)	R 55	R 50	R 60	R 35
<b>1GB</b>	R 65	R 70	R 75	R 80	R 53
<b>2GB</b>	R 95	R 99	R 100	R 120	R 99

Source: ICASA Database based on Tariff Notifications

Table 15: In-bundle Rates for the Standard Daily and Weekly Data Bundles

Data Volume	Operators' In-bundle Rates				
	Cell C	MTN	Telkom Mobile	Vodacom	FNB Connect
<b>Daily Data Bundles</b>					
<b>25MB</b>	R 0.16	R 0.20	N/A	R 0.25	R 0.16
<b>30MB</b>	N/A	N/A	R 0.17	N/A	N/A
<b>50MB</b>	R 0.14	R 0.17	N/A	R 0.15	R 0.14
<b>100MB</b>	R 0.12	R 0.13	R 0.07	R 0.15	R 0.11
<b>250MB</b>	N/A	R 0.09	R 0.07	R 0.11	R 0.08
<b>500MB</b>	R 0.03	N/A	N/A	N/A	R 0.06
<b>1GB</b>	R 0.02	R 0.05	N/A	N/A	R 0.04
<b>Weekly Data Bundles</b>					
<b>50MB</b>	R 0.17	R 0.20	R 0.10	N/A	R 0.18
<b>100MB</b>	R 0.10	R 0.15	R 0.15	R 0.17	R 0.15
<b>250MB</b>	R 0.10	R 0.13	R 0.12	R 0.14	R 0.10
<b>500MB</b>	R 0.09	R 0.11	R 0.10	R 0.12	R 0.07
<b>1GB</b>	R 0.06	R 0.07	R 0.07	R 0.08	R 0.05
<b>2GB</b>	R 0.05	R 0.05	R 0.05	R 0.06	R 0.05

Source: ICASA Database based on Tariff Notifications

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

Telkom Mobile charges the least on the 250MB to 300MB range of daily data bundles, offering 300MB daily data bundle for R 20. This also translates to the lowest in-bundle rate of R 0.07 per MB. Vodacom has the highest in-bundle rate of R 0.11 per MB, as it offers its 250MB daily data bundle for R 27.

Cell C's daily 1GB data bundle is priced the lowest among the tabulated operators, which is priced at R 20 with an in-bundle rate of R 0.02 per MB. FNB Connect and MTN's daily 1GB data bundles are priced R 19 (or 95%) and R 30 (or 150%) more than Cell C's daily 1GB data bundle, respectively.

On the 80MB to 100MB range of weekly data bundles, Vodacom offers the most expensive 100MB bundle than the other operators, charging R 17. Even though Cell C offers 60MB for R 10, this translates to an in-bundle rate of R 0.10 per MB which offer the most value for money. MTN, Telkom Mobile and FNB Connect's in-bundle rates are at R 0.15 per MB for their respective 100MB weekly data bundles.

FNB Connect charges the least for the 500MB weekly data bundle, offering it for R 35. This also translates to the lowest in-bundle rate of R 0.07 per MB. Vodacom has the highest in-bundle rate of R 0.12 per MB, as it offers its 500MB weekly data bundle for R 60. Cell C, Telkom Mobile and MTN offer their 500MB weekly data bundle for R 45, R 50 and R 55, respectively.

On the weekly 1GB bundle FNB Connect offers the lowest price of R 53 among the tabulated operators, with the in-bundle rate of R 0.05 per MB. Cell C, MTN, Vodacom and Telkom Mobile's weekly 1GB bundles are priced R 12 (or 22,6%), R 17 (or 32.1%), R 22 (or 41.5%) and R 27 (or 50.9%) more than FNB Connect's 1GB weekly data bundle, respectively.

Vodacom's weekly 2GB bundle is priced the highest among the tabulated operators, offering its bundle for R 120. Telkom Mobile offers the second highest 2GB price of R 100, R 20 (or 16.7%) cheaper than Vodacom. MTN and FNB Connect both offer their 1GB bundle for R 99 which is R 21 (or 17.5%) less than what Vodacom charges. Cell C charges the least for the 2GB bundle at R 95, which is R 25 (or 20.8%) less than what Vodacom charges.

### **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<sup>14</sup>. 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 discuss

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<sup>14</sup> 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](https://www.itu.int/en/ITU-D/Regional-Presence/Americas/Documents/EVENTS/2015/0421-BS-Economic/1_2.pdf) > Accessed on 21 February 2019.

the OTT linked product offerings, which MNOs filed notifications for, during the period under review.

### 2.1.2.1. MTN Personalised Long-Term Social Bundles

MTN’s Personalised Long-Term Social Bundles were filed with the Authority on 07 July 2020. These are URL-specific bundles with longer validity periods which are offered to customers based on their usage and spend profile. Customers have an option to purchase these bundles on a once-off or recurring basis. Table 16 details the data bundles and their respective validity periods and prices.

Table 16: MTN Personalised Long-Term Social Bundles

Personalised Long-Term Social Bundle	Validity	Inclusive Value	Price (Incl. VAT)
<b>Facebook</b>			
MTN Personalised Social FaceBook-60day-1GB	60 days	1024MB	R 55
MTN Personalised Social FaceBook-60day-2GB	60 days	2048MB	R 89
MTN Personalised Social FaceBook-60day-3GB	60 days	3072MB	R 99
MTN Personalised Social FaceBook-60day-5GB	60 days	5120MB	R 129
MTN Personalised Social FaceBook-90day-1GB	90 days	1024MB	R 70
MTN Personalised Social FaceBook-90day-2GB	90 days	2048MB	R 99
MTN Personalised Social FaceBook-90day-3GB	90 days	3072MB	R 129
MTN Personalised Social FaceBook-90day-5GB	90 days	5120MB	R 149
<b>YouTube</b>			
MTN Personalised Social YouTube-60day-1GB	60 days	1024MB	R 55
MTN Personalised Social YouTube-60day-2GB	60 days	2048MB	R 89
MTN Personalised Social YouTube-60day-3GB	60 days	3072MB	R 99
MTN Personalised Social YouTube-60day-5GB	60 days	5120MB	R 129
MTN Personalised Social YouTube-90day-1GB	90 days	1024MB	R 70
MTN Personalised Social YouTube-90day-2GB	90 days	2048MB	R 99
MTN Personalised Social YouTube-90day-3GB	90 days	3072MB	R 129
MTN Personalised Social YouTube-90day-5GB	90 days	5120MB	R 149
<b>Instagram</b>			
MTN Personalised Social Instagram-60day-1GB	60 days	1024MB	R 55
MTN Personalised Social Instagram-60day-2GB	60 days	2048MB	R 89
MTN Personalised Social Instagram-60day-3GB	60 days	3072MB	R 99
MTN Personalised Social Instagram-60day-5GB	60 days	5120MB	R 129
MTN Personalised Social Instagram-90day-1GB	90 days	1024MB	R 70
MTN Personalised Social Instagram-90day-2GB	90 days	2048MB	R 99
MTN Personalised Social Instagram-90day-3GB	90 days	3072MB	R 129
MTN Personalised Social Instagram-90day-5GB	90 days	5120MB	R 149
<b>WhatsApp</b>			
MTN Personalised Social WhatsApp-60day-1GB	60 days	1024MB	R 40
MTN Personalised Social WhatsApp-60day-2GB	60 days	2048MB	R 65

MTN Personalised Social WhatsApp-60day-3GB	60 days	3072MB	R 75
MTN Personalised Social WhatsApp-60day-5GB	60 days	5120MB	R 99
MTN Personalised Social WhatsApp-90day-1GB	90 days	1024MB	R 45
MTN Personalised Social WhatsApp-90day-2GB	90 days	2048MB	R 70
MTN Personalised Social WhatsApp-90day-3GB	90 days	3072MB	R 80
MTN Personalised Social WhatsApp-90day-5GB	90 days	5120MB	R 120

Source: ICASA Database based on Tariff Notifications

As shown in table 16 above, customers can purchase a URL-specific data bundle with either a 60-day or a 90-day validity period which is longer than is normally the case for such bundles in the market and they could yield more value and savings if they factored the in-bundle rates of the bundle/s of their choice. For example, the 1GB WhatsApp social bundle<sup>15</sup> valid for 30-days is priced at R 50 and has an in-bundle rate of R 0.05 per MB, however the 1GB Personalised Social WhatsApp bundle valid for 60 days is priced at R 40, which has a validity of 30 more days at a lower in-bundle rate of R 0.04 per MB.

Customers can purchase more than one social bundle at any given time, however, this is limited to a maximum of 5 bundles per validity period. MTN introduced the Personalised Long-Term Social Bundles in the market on 10 July 2020.

### **2.1.2.2. Cell C On Us WhatsApp Bundles Promotions**

An amendment to Cell C's On Us WhatsApp bundles promotion's terms and conditions was filed with the Authority on 18 September 2020. This amendment entailed an update of the validity and rollover terms and conditions. In terms of validity period, the On Us WhatsApp 2 hourly bundles are now valid for 2 hours from purchase instead of the previous 1 hour, while the On Us WhatsApp daily bundles are valid for 24 hours from purchase instead of previously being valid until midnight on the day of purchase.

The rollover terms and conditions were revised to extend the expiry period of any remaining data, which now expires at the end of the 2-hour period instead of the expiring after 1 hour as was previously the case.

<sup>15</sup> ICASA, (2019). 2018/19FY Q4 Bi-Annual Tariff Analysis Report; < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-jul-dec-2018> >, page 44, Accessed on 22 February 2021.

Table 17 below shows Cell C's On Us WhatsApp Bundles Promotional bundles and their respective validity periods and prices.

Table 17: Cell C On Us WhatsApp Bundles Promotion

Bundle	Volume	Validity	Price	Tariff rate per MB
20MB 2 Hour On Us Discount WhatsApp Bundle	20MB	2 hours	R 2	R 0.10
100MB 1 day On Us Discount WhatsApp Bundle	100MB	1 day	R 10	R 0.10
200MB 1 day On Us Discount WhatsApp Bundle	200MB	1 day	R 20	R 0.10

Source: ICASA Database based on Tariff Notifications

The amendments to the Cell C On Us WhatsApp Bundles Promotions became effective on 21 September 2020. Cell C's On Us WhatsApp Bundles promotion was planned to end on 31 January 2021, however it has been extended to 30 June 2021<sup>16</sup>.

### 2.1.2.3. Vodacom 1GB WhatsApp NXT LVL Ticket

Vodacom initially filed the 1GB WhatsApp NXT LVL Ticket with the Authority on 16 October 2018. On 28 September 2020, the operator amended the bundle, increasing the price by R 6 or 31.6%, from R 19 to R 25. The bundle offers 1GB (1024MB) of data valid for 30 days to customers aged 18 to 25 years. It should be noted that Vodacom filed the amendment on 28 September 2020, however, on 01 October 2020 the operator notified the Authority of its inability to implement the changes due to technical constraints it experienced. On 06 October 2020, Vodacom notified the Authority again of its intention to implement the amendment to the 1GB WhatsApp NXT LVL Ticket on 07 October 2020.

### 2.1.2.4. Vodacom Ticket

In the period under review, Vodacom filed amendments to its Ticket price plan on 20 October, 28 October and 11 November 2020. The amendment filed on 20 October 2020 entailed the inclusion of Amazon Prime to its Video Ticket and Tik Tok on the Social Ticket. Therefore, the Video Ticket now depletes on VuClip, DStv,

<sup>16</sup> The extension of this promotion was filed on 19 January 2021.



Hopster, Showmax, YouTube Video Play and Amazon Prime. The Social Ticket now depletes on the usage of Facebook (including Messenger), Instagram, Pinterest, Twitter, Tinder and Tik Tok.

On 28 October 2020, the operator added the recurring value-added services (VAS) to its Ticket plan. The bundles may be offered to customers at discounted subscription fees which will be offered at Vodacom’s discretion.

Table 18 below shows the Vodacom Ticket Recurring VAS bundles.

Table 18: Vodacom Ticket Recurring VAS Bundles

Vodacom Ticket	Full Price	25% Discount	50% Discount	75% Discount	90% Discount	Allocation Size	Allocation Frequency
Social Ticket/ Video Ticket	R 60	R 45	R 30	R 15	R 6	1GB	Recurring
Social Ticket/ Video Ticket	R 95	R 71	R 48	R 24	R 7	2GB	Recurring
Social Ticket/ Video Ticket	R 125	R 94	R 63	R 31	R 12	3GB	Recurring
Social Ticket/ Video Ticket	R 175	R 131	R 88	R 44	R 18	5GB	Recurring
Social Ticket/ Video Ticket	R 280	R 210	R 140	R 70	R 28	10GB	Recurring
WhatsApp Ticket	R 35	R 26	R 18	R 9	R 4	1GB	Recurring
WhatsApp Ticket	R 150	R 113	R 75	R 38	R 15	5GB	Recurring
WhatsApp Ticket	R 250	R 188	R 125	R 62	R 25	10GB	Recurring

Source: ICASA Database based on Tariff Notifications

Customers can opt for either a 3, 12, 24 or 36-month subscription period. On 11 November 2020<sup>17</sup>, Vodacom updated its terms and conditions of its Ticket recurring VAS filed on 28 October 2020, wherein the operator added in the terms and conditions that when opting in or activating a discounted recurring Ticket bundle, the bundle is added as part of the respective price plan and incorporated on the customers’ bill. The Vodacom Recurring VAS plan was introduced in the market on 12 November 2020.

<sup>17</sup> It should be noted that Vodacom revised the terms and conditions of the Ticket Recurring VAS bundles before the bundles were launched in the market.

### 2.1.2.5. MTN Ayoba Bundle

MTN filed the Ayoba Bundles with the Authority on 22 October 2020 wherein it offered an Ayoba 500MB daily data bundle for R 5. The Ayoba Bundle only depletes on the usage of the Ayoba App. The bundle is activated on the time of purchase and expires at midnight of the same day. Depletion notifications are sent at 50%, 80% and 100%. Customers can make multiple bundle purchases. MTN's Ayoba 500MB daily data bundle was introduced in the market on 10 November 2020.

### 2.1.2.6. Cell C Socializa Bundles Promotion

Cell C filed its Socializa Bundles Promotion with the Authority on 11 November 2020. The Socializa Bundles Promotion initially offered data that could be used exclusively to access specific social media and/or streaming media platforms, namely, Facebook, Instagram, Twitter, Tik Tok, YouTube and Opera Mini, however Cell C also filed an amendment on 10 December 2020, which excluded Facebook as one of the platforms that the promotion applies to.

This promotional offer is available to all Cell C prepaid, hybrid and post-paid customers, as once-off and recurring bundles valid for 30 days, with no roll-over option for unused data. Customers that migrate from prepaid to post-paid plans or top-up to post-paid plans and vice-versa will result in the customer forfeiting their allocated Socializa Bundles.

Table 19 below provides more details of pricing and validity periods of the different Socializa Bundles promotional offers.

Table 19: Cell C Socializa Bundles Promotional Offer

<b>Socializa Data Bundles Promotional Offer for use on TikTok, Twitter, Instagram or YouTube</b>				
<b>Volume</b>	<b>Price</b>	<b>Validity</b>	<b>Recurring or Once-Off</b>	<b>Rate/MB (cents)</b>
50MB	R 3	Daily (expires 23h59)	Once-Off	R 0.06
100MB	R 5	Daily (expires 23h59)	Once-Off	R 0.05
250MB	R 9	Daily (expires 23h59)	Once-Off	R 0.04
350MB	R 15	7 days	Once-Off	R 0.04
750MB	R 30	7 days	Once-Off	R 0.04

500MB	R 25	30 days	Once-Off	R 0.05
1GB	R 45	30 days	Once-Off	R 0.04
500MB	R 25	30 days	Recurring	R 0.05
1GB	R 45	30 days	Recurring	R 0.04
Socializa Data Bundles Promotional Offer for use on YouTube				
Volume	Price	Validity	Recurring or Once-Off	Rate/MB (cents)
2GB	R 80	30 days	Once-Off and Recurring	R 0.04
3GB	R 120	30 days	Once-Off and Recurring	R 0.04
Socializa Data Bundles Promotional Offer for use on YouTube				
Volume	Price	Validity	Recurring or Once-Off	Rate/MB (cents)
25MB	R 2	Daily (expires 23h59)	Once-Off	R 0.08

Source: ICASA Database based on Tariff Notifications

Cell C launched the Socializa Bundles promotional offer on 13 November 2020 and the promotion will run for an indefinite period until otherwise communicated by Cell C.

#### 2.1.2.7. MTN Youth Pulse Social Pass Bundles

MTN's Youth Pulse Social Pass Bundles were filed with the Authority on 09 December 2020. This new suite offers customers URL-specific data bundles for subscribers of the Youth Pulse<sup>18</sup> price plan. The bundles are offered to customers as daily, weekly and monthly bundles. Table 20 details the Youth Pulse Social Pass Bundles.

Table 20: Youth Pulse Social Pass Bundles

Bundle Name	Accessible URL	Price (Incl. VAT)
Pulse Social Pass - Daily - 500MB	Facebook, WhatsApp, Twitter, YouTube, Instagram, Tik Tok	R 5
Pulse Social Pass – Daily - 2GB	Facebook, WhatsApp, Twitter, YouTube, Instagram, Tik Tok	R 10
Pulse Social Pass – Weekly – 5GB	Facebook, WhatsApp, Twitter, YouTube, Instagram, Tik Tok	R 30
Pulse Social Pass – Monthly – 10GB	Facebook, WhatsApp, Twitter, YouTube, Instagram, Tik Tok	R 49

Source: ICASA Database based on Tariff Notifications

The daily bundles are valid until 23h59 from the time of purchase, the weekly bundles are valid until 23h59 on the seventh (7<sup>th</sup>) day from the time of purchase

<sup>18</sup> MTN Youth Pulse Plan was filed in May 2019 and is exclusive to the 18 – 24-year-old age group.

and the monthly bundles are valid until thirtieth (30<sup>th</sup>) day from the time of purchase. Recurring bundles can roll over to the maximum of twice the recurring value. The validity period of once-off bundles can be extended by the purchase of the same once-off bundle.

MTN customers on the Youth Pulse price plan who utilise social media platforms or OTT services extensively, have access to the tabulated Social Pass bundles, and they receive more value for money. For example, instead of purchasing a standard 30-day 10GB bundle for R 499, they can opt for the Social Pass monthly 10GB for R 49, thus saving R 450 (or 90%). MTN's Youth Pulse Social Pass Bundles came into the market on 11 December 2020.

## **2.2. Analysis of Promotional Prepaid Data Tariffs**

### ***2.2.1. MTN University and TVET Bundle for NSFAS Students***

MTN filed its University and TVET Bundle for NSFAS Students with the Authority on 30 July 2020. This bundle is aimed at assisting students with reduced costs to communication to ensure with continued studying during the COVID-19 pandemic period. It comprises of a sim-only 30 Gigs University Bundle which offers 10GB Anytime data and 20GB night express<sup>19</sup> data for R 65 recurring for three months. The inclusive value is provisioned on the student numbers/accounts, on a post-paid or prepaid basis. All promotional value is valid for 30 days from allocation and cannot be used for international roaming or international calling. MTN launched its promotional offer in the market on 03 August 2020<sup>20</sup> and it will be in the market until further notice.

## **2.3. Regulatory interventions underway to address data costs**

Section 2.2 above highlighted various prepaid data bundle plans and packages and as was analysed above there has been changes in data bundle prices. Table

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<sup>19</sup> MTN's Night Express data are data bundles that can only be used from 00h01 and 04h59.

<sup>20</sup> MTN filed the University and TVET Bundle for NSFAS Students offer with respect to the ICT COVID-19 National Disaster Regulations (Government Gazette No. 43207).

4 above indicated that prices have generally been declining for some standard 30-day prepaid data bundles and noticeably there are various promotions in the market which offer data services at affordable prices. Nonetheless the Authority continues to implement regulatory measures and interventions which seek to ensure that data services prices and other costs to communicate are reasonably affordable.

The sub-sections below provide an update<sup>21</sup> of the regulatory interventions which are underway to address data costs.

### ***2.3.1. The ICT COVID 19 National Disaster Regulations***

The Authority published the Information and Communications Technology (“ICT”) COVID-19 National Disaster Regulations (“the Regulations”)<sup>22</sup> on April 2020, that prescribe the minimum standards that licensees must follow for the entire duration of the National State of Disaster. As stated in the preceding 2020/21 FY Q2 Bi-Annual Tariff Analysis report, one of the measures introduced by the regulations was the temporary release of high demand spectrum (HDS) for the duration of the national state of disaster to deal with the anticipated increase in demand for network capacity or data services<sup>23</sup>.

On 27 November 2020, the Authority published the amendment to the aforementioned Regulations<sup>24</sup>. Under these regulations, the validity period of the temporary assignment of radio frequency spectrum was extended from 30 November 2020 to 31 March 2021. Under the amended Regulations, regulation 6 requires Licensees to pay pro-rated radio frequency spectrum license fees, in terms of the Radio Frequency Spectrum License Fees Regulations, 2010, for the period 1 December 2020 to 31 March 2021.

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

<sup>22</sup> Information and Communications Technology (“ICT”) COVID-19 National Disaster Regulations, Government Gazette 43207

<sup>23</sup> Pages 46-47, available on ICASA’s website: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020> > Accessed on 20 January 2021

<sup>24</sup> Government Gazette No. 43945, Notice 678 of 2020

### **2.3.2. Licensing processes for the IMT spectrum and the WOAN**

On 30 September 2020, the Chairperson of the Authority announced plans for the licensing of high demand spectrum and the wireless open-access network (WOAN)<sup>25</sup>. Subsequently, on 02 October 2020, the Authority published two Invitations to Apply (ITAs) relating to the licensing process for International Mobile Telecommunications (IMT spectrum)<sup>26</sup> and the licensing of the WOAN<sup>27</sup>. In the finalisation of the ITAs, the Authority considered the Policy on High Demand Spectrum and Policy Direction on the Licensing of a Wireless Open Access Network<sup>28</sup> as obligated by section 3(4) of the Electronic Communications Act (“ECA”) and the Information Memorandum (IM) for IMT spectrum Assignment<sup>29</sup>.

The date of announcement of qualified bidders in terms of the IMT Invitation to Apply (ITA) has been postponed by the Authority from the initial date of 22 February 2021 to 23 March 2021. Thereon, the auction phase is expected to commence by the 31<sup>st</sup> of March 2021<sup>30</sup>.

### **2.3.3. Market Inquiry into the Broadband Services Markets**

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

This Inquiry which is being conducted in terms of section 4B of the ICASA Act read with section 67(4) of the ECA is aimed at addressing the concerns raised by various stakeholders regarding data prices, and to respond to the final policy

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<sup>25</sup> Available on ICASA’s website: < <https://www.icasa.org.za/news/2020/plans-for-the-licensing-of-high-demand-spectrum-and-the-woan> > Accessed on 28 January 2020.

<sup>26</sup> Government Gazette No. 43768, Notice 535 of 2020

<sup>27</sup> Government Gazette No. 43767, Notice 534 of 2020

<sup>28</sup> Government Gazette No. 42597, Notice 649 of 2019

<sup>29</sup> Government Gazette No. 42820, Notice 653 of 2019

<sup>30</sup> There was a litigation challenge which saw Telkom and e.tv being granted an interdict to halt the spectrum auctioning process. The Authority released a media statement on 16 March 2021, indicating that it will appeal the court decision and that it has since halted all processes relating to the licensing of high demand spectrum and the WOAN pending the outcome of the court processes.

direction on effective competition in broadband markets and the reduction of data costs.

On 26 and 27 October 2020, the Authority held public hearings in relation to the Discussion Document on Mobile Broadband Services Inquiry. ICASA received a total of 10 written submissions on the Discussion Document<sup>31</sup>. The Authority is about to conclude on phase 4 of the project which entails the gazetting Findings Document and, if necessary, draft regulations which will be published for public comment for a period of 30 working days after the date of publication. The timelines regarding the publishing of the summary of findings and draft regulations are yet to be announced.

## **2.4. Analysis of Standard Prepaid Voice Tariffs**

Standard prepaid voice tariffs are categorised into three types, namely flat-rate, dynamic and on-net tariffs. In the period under review no standard prepaid voice tariffs were filed with the Authority and the current tariffs can be obtained in the 2020/21 FY Q2 Bi-Annual Tariff Analysis Report<sup>32</sup> which was published on ICASA's website on 12 January 2021.

### ***2.4.1. Flat-rate tariffs***

The Authority did not receive any flat-rate tariffs during the period under review, therefore, no update is provided in this report and the current updates can be found in the 2020/21FY Q2 Bi-Annual Tariff Analysis Report, which was published on ICASA's website on 12 January 2021.

### ***2.4.2. On-net focused tariffs***

The Authority also did not receive any on-net focused tariffs during the period under review. Thus, no update is provided in this report and the current updates

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<sup>31</sup> Available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/inquiries/mobile-broadband-services-inquiry> > Accessed on 28 January 2020.

<sup>32</sup> Pages 51-52, available on ICASA's website <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020> > Accessed on 21 January 2021

can be found in the 2019/20FY Q2 Bi-Annual Tariff Analysis Report, which was published on ICASA's website on 10 December 2019<sup>33</sup>.

### **2.4.3. Dynamic Tariffs**

The Authority did not receive any notification on dynamic tariffs in the period under review, therefore, no update is provided in this report. The current tariffs can be found in the 2019/20FY Q2 Bi-Annual Tariff Analysis Report<sup>34</sup>.

### **2.4.4. Analysis of standard voice bundles billed per minute**

#### **2.4.4.1. MTN Sunrise Bundle**

MTN's Sunrise Bundle Offer was filed with the Authority on 28 July 2020, wherein it offers prepaid customers 60 on-net voice minutes to use between the 00h00 and 06h59 for a price of R 1. The bundle is valid for 24 hours from the time of purchase and customers can purchase it via the \*136\*2# USSD code or the MyMTN App. Customers are limited to one Sunrise Bundle per day. Calls to other networks, international roaming, international calling and premium rated calls do not deplete this bundle. MTN introduced its Sunrise Bundle offer in the market on 30 July 2020.

#### **2.4.4.2. MTN All-Net and On-Net Voice Bundles**

MTN's amendment to its All-Net and On-Net Voice Bundles was filed with the Authority on 26 August 2020<sup>35</sup> entails the addition of new all-net and on-net voice bundles in its Personalised Voice Bundles suite. The allocation of personalised voice bundles is based on the customers' usage and spending patterns and are available through the \*142# USSD and the MyMTNApp options. Table 21 below shows a sample of the additional MTN All-Net and On-Net Voice Bundles and their respective prices.

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<sup>33</sup> Pages 39-40, available on ICASA's website < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-quarter-2-2019-20-jan-jun-2019>> Accessed on 20 January 2021.

<sup>34</sup> Pages 42-43, available on ICASA's website < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-quarter-2-2019-20-jan-jun-2019>> Accessed on 23 August 2020.

<sup>35</sup> Previous filings of the Personalised Voice Bundles were made on 15 November 2019 and 24 February 2020.



Table 21: MTN All-Net and On-Net Voice Bundles

PAYG Voice Bundle	Inclusive Minutes	Validity	Bundle price (Inc. VAT)
<b>All-Net Bundles</b>			
Daily R 3	5	24 Hours	R 3
Daily R 5	10		R 5
Daily R 7	15		R 7
Daily R 10	25		R 10
Daily R 12	35		R 12
Daily R 20	60		R 20
Weekly R 10	15	1 Week	R 10
Weekly R 20	40		R 20
Weekly R 30	70		R 30
Weekly R 40	120		R 40
Weekly R 50	160		R 50
Weekly R 150	600		R 150
Monthly R 20	30	1 Month	R 20
Monthly R 50	120		R 50
Monthly R 80	200		R 80
Monthly R 100	250	1 Month	R 100
Monthly R 150	400		R 150
Monthly R 200	600		R 200
Monthly R 250	900		R 250
Daily R 3	7	24 Hours	R 3
Daily R 5	13		R 5
Daily R 7	20		R 7
Daily R 10	35		R 10
Daily R 15	60		R 15
Daily R 20	90		R 20
Weekly R 10	20	1 Week	R 10
Weekly R 20	60		R 20
Weekly R 30	140		R 30
Weekly R 50	280		R 50
Weekly R 100	600		R 100
Monthly R 20	50		1 Month
Monthly R 50	150	R 50	
Monthly R 150	1000	R 150	
Monthly R 200	1700	R 200	
Monthly R 300	3000	R 300	

Source: ICASA Database based on Tariff Notifications

More information regarding MTN's All-Net and On-Net Voice Bundles can be found on the operators' website<sup>36</sup>. The amendment was filed using the ICT COVID-19 National Disaster Regulations and thus came into effect on 28 August 2020.

#### **2.4.4.3. Vodacom All-net Bundles**

Vodacom's All-net Bundles were filed with the Authority on 31 August 2020. The operator initially filed its All-net Bundles with the Authority on 28 August 2017 as a promotional offer and with the 31 August 2020, these bundles were made

<sup>36</sup> Available online at: < <https://www.mtn.co.za/Pages/Voice-Bundles.aspx> > Accessed on 20 January 2021

permanent i.e. they are now a standard offering. Table 22 shows Vodacom’s All-Net voice bundles price details.

Table 22: Vodacom All-Net Voice Bundles

All-Net Bundles	Type	Bundle Allocation	Current Price
Chat For 60	Voice	60 min All-Net	R 12
Chat Now 60	Voice	60 min (from time of allocation) All-Net	R 9.50
Chat Now 10	Voice	10 min (from time of allocation) All-Net	R 3.20
Chat Combo 60+60	Voice + Data	60 min All-Net + 60MB	R 17.80

Source: ICASA Database based on Tariff Notifications

The bundles are only available to prepaid and top-up subscribers, however customers on the Prepaid 79c plan contract customers and community services SIMs are excluded. Customers are limited to one Chat For 60 bundle a day and all unused minutes expire every day at midnight on the day of purchase.

Vodacom’s Chat For 60 voice bundle can be compared to MTN’s 60 minutes daily all-net voice bundle<sup>37</sup> which is priced at R 20. Thus, Vodacom charges R 8 or 40% less than what MTN charges for 60 all-net minutes. This translates to Vodacom’s and MTN’s effective rates of R 0.20 and R 0.33 per minute, respectively. Vodacom’s amendment to the All-net Bundles came into effect on 01 September 2020.

#### 2.4.4.4. MTN Comfort Zone

MTN filed its Comfort Zone value-added service<sup>38</sup> with the Authority on 28 September 2020. The MTN Zone Pay-As-You-Go (PAYG) price plan uses dynamic discounting that offers voice call discounts allowing zone customers up to 100% discounts on local voice calling depending on the customers location. As part of its MTN Zone price plan, the operator introduced new value-added Comfort Zone which gives MTN Zone subscribers the ability to access guaranteed discounted call rates in exchange for a subscription fee. Table 23 below details the MTN Comfort Zone Tariffs.

<sup>37</sup> Analysed in 2.4.2.1.2. above.

<sup>38</sup> This is not a stand-alone price plan.

Table 23: MTN Comfort Zone Tariffs

<b>PAYG Prepaid Price plan</b>	<b>Comfort zone subscription per day (Incl. VAT)</b>	<b>Comfort zone subscription per week (Incl. VAT)</b>	<b>Comfort zone subscription per Month (Incl. VAT)</b>	<b>Guaranteed Out of bundle voice rate with subscription (Incl. VAT)</b>
PAYG - MTN Zone On-Net calling option	R 2	R 5	R 15	R 0.39 (85% on-net calls)/offnet =base price plan rates with zone discounts
PAYG - MTN Zone All-Net calling option	R 5	R 10	R 30	R 0.39 (85% All-net calls)
PAYG - MTN Zone Combo On-Net and Off-Net calling option	R 3	R 10	R 25	R 0.39 (85% on-net calls)
				R 0.65 (75% off-net calls)

Source: ICASA Database based on Tariff Notifications

Customers are offered daily, weekly and monthly subscriptions to the three calling options (on-net, all-net and a combo on-net and off-net calling option) all billed per minute. The subscriptions will guarantee customers the corresponding discounted flat-rate when the customer recharges and makes calls. For example, customers on the MTN Zone On-Net calling option on a monthly subscription will be charged R 0.39 per minute on on-net calls and a base tariff with zone discounts (0% - 100%) for off-net calls. More information regarding MTN’s Comfort Zone price plan can be found on the operator’s website<sup>39</sup>.

MTN filed the Comfort Zone offer with respect to the ICT COVID-19 National Disaster Regulations, hence the offer was introduced in the market on 01 October 2020.

## 2.5. Analysis of Promotional Prepaid Voice Tariffs

This section analyses the promotional prepaid voice tariffs which were filed during the period under review. The promotional tariff plans are generally short term in nature and their validity period range from one day up to 6 months. As such, all other promotional prepaid voice 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 2020.

<sup>39</sup> Available online at: < <https://www.mtn.co.za/Pages/termsandconditions.aspx?pageId=1306> > Accessed 23 February 2021.

### 2.5.1. Cell C On Us Discount Voice Bundles Promotion

The amendment of Cell C's On Us Discount Voice Bundles Promotion was filed on 18 September 2020. The amendment included an update of the gifting, transfer rules and the validity of the bundles. In terms of gifting, customers are unable to buy an On Us data bundle for another Cell C customer. The On Us daily bundles are valid for 24 hours from purchase instead of previously being valid until midnight from time of purchase. The amendment was effective from 21 September 2020.

Table 24 below shows the pricing and other related information of Cell C's On Us Discount Voice Bundles Promotion.

Table 24: Cell C On Us Discount Voice Bundles Promotion

Bundle	Network	Minutes	Validity	Price	Price per Minute
10 Minute Hourly On Us Discount Voice Any-net Bundle	Any network	10	1 hour	R 8	R 0.80
20 Minute Hourly On Us Discount Voice Any-net Bundle	Any network	20	1 hour	R 14	R 0.70
30 Minute Hourly On Us Discount Voice Any-net Bundle	Any network	30	1 hour	R 20	R 0.67
60 Minute Hourly On Us Discount Voice Any-net Bundle	Any network	60	1 hour	R 36	R 0.60
60 Minutes Daily On Us Discount Voice Any-net Bundle	Any network	60	1 day	R 64	R 1.06

Source: ICASA Database based on Tariff Notifications

Cell C On Us Discount Voice Bundles Promotion rewards customers with discounts on the prices of selected bundles based on certain criteria such as the time of day or the network cell and segment which a customer falls in. For example a customer can receive a 30 minute hourly voice bundle which is valid for 1 hour from purchase at a discounted price of R 20 or effectively R 0.67 per minute, which is less than the flat rate per minute of the Cell C Ultrabonus price plan (R 1.75 per minute) and the Cell C All-In-One (R 0.99 per minute) as was analysed in the previous 2020/21 Q2 Bi-Annual Tariff Analysis Report<sup>40</sup>.

<sup>40</sup> Page 51, available on ICASA's website: <<https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020>> Accessed on 23 February 2021

The On Us Discount Voice Bundles Promotion was set to run until 31 January 2021, however Cell C filed an extension on 19 January 2021 and the revised end date is 30 June 2021.

## 2.6. Analysis of Integrated Prepaid Tariff Plans

The Authority has observed an increase in standard prepaid and promotional prepaid integrated bundles being offered by the various MNOs and MVNOs and has therefore taken an initiative to include the analysis thereof in the report. These product offerings are analysed in the next sub-sections with the focus being on standard prepaid integrated bundles filed with the Authority during the period under review. Integrated bundles are a combination of voice, data and/or SMS bundles sold as a unit package to customers.

### 2.6.1. Analysis of Standard Prepaid Integrated Bundles

#### 2.6.1.1. MTN Unisa Students Offer

MTN filed its Unisa Students Offer with the Authority on 12 August 2020, wherein it offers 30-day integrated bundles for Unisa students, under the MyMTN Offers suite. The MyMTN Offers are a suite of personalised bundles that are offered to certain customers based on eligibility requirements including usage and spend behaviour. It should be noted that the bundles cannot be rolled over and also cannot be shared with any other customer. Table 25 below shows MTN's Unisa student bundles.

Table 25: MTN Unisa Student Bundles

MyMTN Offer Bundle	Validity	Inclusive Value	Price (Incl. VAT)
MyMTN Offers Unisa Monthly R 49 Integrated	30 day	2GB Anytime Data + 3GB Night Express Data + 30 All-Net minutes	R 49
MyMTN Offers Unisa Monthly R 99 Integrated		5GB Anytime Data + 10GB Night Express Data + 60 All-Net minutes	R 99

Source: ICASA Database based on Tariff Notifications

The integrated bundles give Unisa students more value for money. For example, MTN’s 2GB 30-day standard prepaid data bundle is priced at R 189, whilst a Unisa student would get an integrated bundle with 2GB anytime data, 3GB night express data and 30 all-net minutes for R 49, which means that the students receive more value for money, while saving R 140.

### 2.6.1.2. Vodacom All 4 You Bundles

Following the extension of the Vodacom Power Pack Integrated Promotional Bundles filed with the Authority on 20 August 2019, the operator decided on 31 August 2020 to file another notification which converted the promotional bundles into a permanent offering, with a new name i.e. Vodacom All 4 You Bundles.

Table 26 below shows the Vodacom All 4 You Bundles.

Table 26: Vodacom All 4 You Bundles

Allocation	Price	Validity
30 mins + 150MB + 300MB WhatsApp	R 25	7 days
40 mins + 650MB data + 650MB + NightOwl + 1GB WhatsApp	R 99	30 days

Source: ICASA Database based on Tariff Notifications

The integrated bundles include on-net voice minutes, open data<sup>41</sup> and WhatsApp data bundles and are available to all Vodacom prepaid and hybrid customers and can be accessed via the \*123\*25# USSD code. There is no limit on the number of All 4 You bundles that a customer can purchase. It also should be noted that Night Owl data can only be used between midnight and 5am and WhatsApp bundles exclude video calling and voice calling.

The integrated bundles are offer customers more value for money. For example, a 500MB standard 30-day prepaid data bundle is priced at R 79 while a 1GB WhatsApp Ticket costs R 35, thus both combining for R 114. However, for R 15 less, Vodacom’s All 4 You offers customers 40 voice minutes, 650MB data, 650MB NightOwl data and 1GB WhatsApp bundle, all valid for 30 days.

<sup>41</sup> Open data refers to standard data bundles i.e. data bundles that are not limited to any specific URL(s) and can be used anytime of the day.

Vodacom introduced the All 4 You Bundles in the market on 01 September 2020.

#### **2.6.1.3. Vodacom Power Hour + WhatsApp Bundle**

On 31 August 2020, Vodacom re-introduced its 25 Year Campaign promotional bundle as a permanent offer in the market, bearing the new name, Vodacom Power Hour + WhatsApp Bundle. The bundle was initially filed with the Authority on 24 May 2019, comprising of 60 on-net voice minutes and 1GB WhatsApp data for R 11, which is a daily offer valid until 23h59 from the time of purchase.

The bundles are only available to prepaid customers and top-up subscribers, with the exception of Prepaid 79c customers, contract customers and community services SIMs. Customers can purchase unlimited Vodacom Power Hour + WhatsApp bundles per day that the customer can purchase. It should be noted that WhatsApp bundles exclude video calling and voice calling.

Considering that Vodacom offers its Power Hour bundle for R 8, customers get more value for money when purchasing the Power Hour + WhatsApp bundle for R 11, by adding only R 3 to also receive a 1GB data bundle. Vodacom's Power Hour + WhatsApp Bundle can also be compared to MTN's Super Power Bundles plan which was filed with the Authority on 01 July 2019 and analysed in the 2019/20 FY Q4 Bi-Annual Tariff Analysis Report<sup>42</sup>. Similar to Vodacom's Power Hour + WhatsApp Bundle, MTN offers customers 60 on-net voice minutes and 1GB WhatsApp data for R 11 to use from the time of purchase until 23h59.

Vodacom introduced the Vodacom Power Hour + WhatsApp Bundles in the market on 01 September 2020.

#### **2.6.1.4. Vodacom Connected Every Day Bundles**

Vodacom's amendment to its Connected Every Day Bundles which was filed with the Authority on 07 September 2020 entailed an addition of new integrated

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<sup>42</sup> Page 39, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jul-29-dec-2019> > Accessed on 27 January 2021

bundles. The Connected Every Day Bundles were initially filed with the Authority on 29 June 2020. The bundles comprise of open data and on-net voice minutes, with each bundle allocation being valid for 1 day and recurring for either 3, 7, 21 or 30 days. Table 27 below shows the bundles with their respective prices.

Table 27: Vodacom Connected Every Day Bundles

Description	Data Allocation	Voice Allocation	Validity (Days)	Max Price (Dynamic Pricing)
<b>3 Days Recurring</b>				
10 Voda minutes + 100MB daily	100MB	10 minutes	1	R 39
20 Voda minutes + 150MB daily	150MB	20 minutes	1	R 55
30 Voda minutes + 200MB daily	200MB	30 minutes	1	R 59
60 Voda minutes + 250MB daily	250MB	60 minutes	1	R 65
<b>7 Days Recurring</b>				
10 Voda minutes + 100MB daily	100MB	10 minutes	1	R 85
20 Voda minutes + 150MB daily	150MB	20 minutes	1	R 109
30 Voda minutes + 200MB daily	200MB	30 minutes	1	R 115
60 Voda minutes + 250MB daily	250MB	60 minutes	1	R 135
<b>21 Days Recurring</b>				
10 Voda minutes + 100MB daily	100MB	10 minutes	1	R 199
20 Voda minutes + 150MB daily	150MB	20 minutes	1	R 269
30 Voda minutes + 200MB daily	200MB	30 minutes	1	R 289
60 Voda minutes + 250MB daily	250MB	60 minutes	1	R 319
<b>30 Days Recurring</b>				
10 Voda minutes + 100MB daily	100MB	10 minutes	1	R 249
20 Voda minutes + 150MB daily	150MB	20 minutes	1	R 339
30 Voda minutes + 200MB daily	200MB	30 minutes	1	R 356
60 Voda minutes + 250MB daily	250MB	60 minutes	1	R 399

Source: ICASA Database based on Tariff Notifications

Customers who purchase the 7 days recurring 60 minutes and 250MB for R 135 receive 60 on-net minutes and a 250MB data bundle per day for a period of 7 days. Thus, in total they receive 1750MB of data and 420 on-net minutes.

It should be noted that Vodacom filed the amendment with respect to the ICT COVID-19 National Disaster Regulations, thus Vodacom's addition of the Connected Every Day bundles came to effect on 08 September 2020.

#### **2.6.1.5. Cell C All-In-One Prepaid Tariff Plan**

Cell C initially filed its All-In-One prepaid tariff plan with the Authority on 09 June 2020 and it was analysed in the 2020/21 FY Q2 Bi-Annual Tariff Analysis Report<sup>43</sup>.

<sup>43</sup> Available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020> >, page 45-46, Accessed on 20 January 2021



On 10 September 2020, the operator filed an amendment of the terms and conditions of the tariff plan. The amendment entailed an update of the recharge rule to allow a cumulative recharge to unlock the free bonus bundle as well as allow non-cumulative bundle purchases (SMS/Voice or data) to unlock the free bonus bundle.

### 2.6.1.6. MTN Personalised Prepaid Integrated

MTN filed additional Personalised Prepaid Integrated Bundles on 13 November 2020 following a previous notification which was filed on 12 August 2019. The bundles comprise of data bundles (anytime and night), voice minutes (on-net and/or all-net) and SMSes, which are available to customers as once-off bundles.

Table 28 below sets out the additional Personalised Integrated bundles, previous bundle information can be obtained from the 2019/20 FY Q4 Bi-annual Tariff Analysis Report, which was published on the Authority's website<sup>44</sup>.

Table 28: MTN Additional Personalised Prepaid Integrated Bundles

Bundle	Validity	Inclusive value	Price (Incl. VAT)
Daily R 5	Daily	20MB Anytime Data + 3 All-Net min + 5 SMS	R 5
Daily R 9		50MB Anytime Data + 50MB Night-Express Data + 8 All-Net min + 10 SMS	R 9
Daily R 10		100MB Anytime Data + 100MB Night-Express Data + 100MB Video Streaming Data + 8 All-Net min + 10 SMS	R 10
Daily R 15		120MB Anytime Data + 120MB Night-Express Data + 120MB Video Streaming Data + 15 All-Net min + 10 SMS	R 15
Daily R 20		300MB Anytime Data + 300MB Night-Express Data + 150MB Video Streaming Data + 150MB WhatsApp Data + 30 All-Net min + 20 SMS	R 20
Daily R 25		500MB Anytime Data + 500MB Night-Express Data + 250MB Video Streaming Data + 250MB WhatsApp Data + 30 All-Net min + 20 SMS	R 25
Weekly R 10	Weekly	50MB Anytime Data + 50MB Night-Express Data + 50MB Video Streaming Data + 12 All-Net min + 10 SMS	R 10
Weekly R 15		100MB Anytime Data + 100MB Night-Express Data + 50MB Video Streaming Data + 50MB WhatsApp Data + 15 All-Net min + 30 SMS	R 15
Weekly R 29		150MB Anytime Data + 150MB Night-Express Data + 100MB Video Streaming Data + 50MB WhatsApp Data + 15 All-Net min + 50 SMS	R 29
Weekly R 39		350MB Anytime Data + 350MB Night-Express Data + 250MB Video Streaming Data + 100MB WhatsApp Data + 35 All-Net min + 100 SMS	R 39

<sup>44</sup> Page 41, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jul-29-dec-2019> > Accessed 23 February 2021.

<b>Bundle</b>	<b>Validity</b>	<b>Inclusive value</b>	<b>Price (Incl. VAT)</b>
Weekly R 49	Weekly	500MB Anytime Data + 500MB Night-Express Data + 250MB Video Streaming Data + 250MB WhatsApp Data + 40 All-Net min + 200 SMS	R 149
Weekly R 79		1GB Anytime Data + 1GB Night-Express Data + 500MB Video Streaming Data + 500MB WhatsApp Data + 70 All-Net min + 200 SMS	R 79
Weekly R 99		2GB Anytime Data + 2GB Night-Express Data + 1GB Video Streaming Data + 1GB WhatsApp Data + 120 All-Net min + 200 SMS	R 99
Weekly R 139		3GB Anytime Data + 3GB Night-Express Data + 2GB Video Streaming Data + 1GB WhatsApp Data + 200 All-Net min + 200 SMS	R 139
Weekly R 199		5GB Anytime Data + 5GB Night-Express Data + 5GB Video Streaming Data + 5GB WhatsApp Data + 350 All-Net min + 200 SMS	R 199
Weekly R 249		10GB Anytime Data + 10GB Night-Express Data + 3GB Video Streaming Data + 2GB WhatsApp Data + 200 All-Net min + 200 SMS	R 249
Monthly R 39	Monthly	200MB Anytime Data + 200MB Night-Express Data + 100MB Video Streaming Data + 100MB WhatsApp Data + 30 All-Net min + 50 SMS	R 39
Monthly R 49		300MB Anytime Data + 300MB Night-Express Data + 150MB Video Streaming Data + 150MB WhatsApp Data + 30 All-Net min + 50 SMS	R 49
Monthly R 69		400MB Anytime Data + 400MB Night-Express Data + 200MB Video Streaming Data + 200MB WhatsApp Data + 50 All-Net min + 50 SMS	R 69
Monthly R 79		750MB Anytime Data + 750MB Night-Express Data + 500MB Video Streaming Data + 250MB WhatsApp Data + 60 All-Net min + 50 SMS	R 79
Monthly R 99		1GB Anytime Data + 1GB Night-Express Data + 500MB Video Streaming Data + 500MB WhatsApp Data + 100 All-Net min + 300 SMS	R 99
Monthly R 149		1.5GB Anytime Data + 1.5GB Night-Express Data + 1GB Video Streaming Data + 500MB WhatsApp Data + 100 All-Net min + 300 SMS	R 149
Monthly R 179		2.5GB Anytime Data + 2.5GB Night-Express Data + 2.5GB Video Streaming Data + 500MB WhatsApp Data + 150 All-Net min + 300 SMS	R 179
Monthly R 199		3GB Anytime Data + 3GB Night-Express Data + 2.5GB Video Streaming Data + 500MB WhatsApp Data + 250 All-Net min + 300 SMS	R 199
Monthly R 250		4GB Anytime Data + 4GB Night-Express Data + 3GB Video Streaming Data + 1GB WhatsApp Data + 250 All-Net min + 300 SMS	R 250
Monthly R 349		5GB Anytime Data + 5GB Night-Express Data + 4GB Video Streaming Data + 1GB WhatsApp Data + 400 All-Net min + 300 SMS	R 349
Monthly R 449		10GB Anytime Data + 10GB Night-Express Data + 8GB Video Streaming Data + 2GB WhatsApp Data + 400 All-Net min + 300 SMS	R 449
Monthly R 499		15GB Anytime Data + 15GB Night-Express Data + 10GB Video Streaming Data + 2GB WhatsApp Data + 400 All-Net min + 300 SMS	R 499
Monthly R 699		20GB Anytime Data + 20GB Night-Express Data + 15GB Video Streaming Data + 5GB WhatsApp Data + 500 All-Net min + 300 SMS	R 699
Monthly R 799		30GB Anytime Data + 30GB Night-Express Data + 25GB Video Streaming Data + 5GB WhatsApp Data + 600 All-Net min + 500 SMS	R 799

Source: ICASA Database based on Tariff Notifications

MTN’s Personalised Prepaid Integrated Bundles offers customers more value for money. For example, a 1GB standard prepaid 30-day data bundle is priced at R 99, however, for the same amount, the Monthly R 99 Personalised Prepaid Integrated bundle offers customers 1GB anytime data, 1GB night express data, 500MB video streaming data, 500MB WhatsApp data, 100 all-net minutes and 300 SMSes. MTN introduced the above Personalised Integrated bundles in the market on 17 November 2020<sup>45</sup>.

### 2.6.1.7. MTN Youth Pulse Bundles

MTN filed an amendment to its Youth Pulse Bundles with the Authority on 09 December 2020, wherein it replaced the bundles initially filed with the Authority on 17 May 2019. The bundles are exclusively for customers between 18 – 24 years of age who have subscribed to the MTN Youth Pulse price plan. In order to subscribe to the Youth Pulse price plan, customers are required to register with their valid identity numbers through USSD codes \*411# or \*136#, or through the application interface (i.e. MyMTN App). It should be noted that the initial notification regarding MTN’s Youth Pulse Bundles was analysed in the 2019/20 FY Q2 Bi-Annual Tariff Analysis Report<sup>46</sup>. Table 29 below shows the new MTN Youth Pulse Bundles packages with their respective subscription fees.

Table 29: MTN Youth Pulse Bundles

Bundle Name	Inclusive Value	Price (Incl. VAT)
Daily R 5	50 MB Anytime Data + 50 MB Night Express Data	R 5
Daily R 5	60 MB Anytime Data + 60 MB Night Express	R 5
Daily R 10	400 MB Anytime Data	R 10
Daily R 10	500 MB Anytime Data	R 10
Daily R 19	1 GB Anytime Data + 30 On-Net Minutes	R 19
Daily R 19	1.5 GB Anytime Data	R 19
Weekly R 30	400 MB Anytime Data + 400 MB Anytime Data + 60 On-Net Minutes	R 30
Weekly R 30	500 MB Anytime Data + 500 MB Night Express Data	R 30
Monthly R 79	1GB Anytime Data + 1GB Night Express Data + 60 On-Net Minutes	R 79
Monthly R 79	1.25GB Anytime Data + 1.25GB Night Express Data	R 79

Source: ICASA Database based on Tariff Notifications

<sup>45</sup> MTN filed the Personalised Prepaid Integrated Bundles with respect to the ICT COVID-19 National Disaster Regulations (Government Gazette No. 43207), thus the operator’s amendment came to effect on 12 November 2020.

<sup>46</sup> Page 52, available on ICASA’s website: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-quarter-2-2019-20-jan-jun-2019> > Accessed 23 February 2021.

The daily bundles are valid until 23h59 from the time of purchase, the weekly bundles are valid until 23h59 on the seventh day from the time of purchase and the monthly bundles are valid until thirtieth day from the time of purchase. Recurring bundles can roll over to the maximum of twice the recurring value. The validity period of once-off bundles can be extended by the purchase of the same once-off bundle. Customers can only share the Anytime value through Data Share.

MTN's Youth Pulse bundles offer more value to the qualifying customers. For example, the standard 30-day prepaid 1GB data bundle costs R 99 whereas the Youth Pulse monthly R 79 package is R 20 cheaper and is inclusive of 1GB anytime data, 1GB night express data and 60 on-net minutes.

MTN's amendment of the Youth Pulse bundles came into effect on 11 December 2020.

## **2.7. Month-to-Month LTE and Wi-Fi Tariff Plans**

This section analyses LTE and wireless internet tariff plans offered in the market as per notifications filed from 01 July to 31 December 2020. The analysis of the tariff plans will consider month-to-month (MtM)<sup>47</sup> plans applicable offered during the period under review.

### ***2.7.1. Vodacom Home Internet***

Vodacom filed an amendment to its Home Internet with the Authority on 31 August 2020. The price plan was initially filed with the Authority on 30 August 2019, bearing the name Vodacom Home Wi-Fi Service, and this name was changed on 15 July 2020, to Vodacom Home Internet. Following the amendment filed on 25

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<sup>47</sup> 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.

March 2020, the operator amended the subscription fees of the Home Internet packages and introduced new MtM packages<sup>48</sup>, which indicated in Table 30 below.

Table 30: Vodacom Month-to-Month Home Internet Packages

Data Allocation	Night Owl Allocation	Speed	Previous Price	New Price
<b>Month to Month Home Internet Data Contracts</b>				
100GB	100GB	10Mbps	N/A	R 799
200GB	200GB	10Mbps	N/A	R 999
300GB	300GB	20Mbps	N/A	R 1 299
400GB	400GB	20Mbps	N/A	R 1 499

Source: ICASA Database based on Tariff Notifications

Vodacom filed another amendment with the Authority on 31 August 2020, whereby it revised the terms and conditions of the plan, and the salient changes were:

- If customers choose to be billed on a MtM basis, they would be billed for the full upfront device cost and monthly subscription charge on the initial month and billed for the monthly subscription, other applicable VAS, bundle purchases or OOB usage on the subsequent months;
- If customers choose to cancel the service between the 1<sup>st</sup> and the 3<sup>rd</sup> of the month, the cancellation would only be effective at the end of that particular month, otherwise the cancellation would be left pending until the end of the following month;
- Customers are offered the Huawei B353 router as part of the service;
- Vodacom Home Internet 100GB and 200GB packages are limited to speeds of up to 10Mbps; and
- Vodacom Home Internet 300GB and 400GB packages are limited to speeds of up to 20Mbps.

### **2.7.2.MTN Month-to-Month Home Wi-Fi Price Plans**

MTN filed an amendment of its Month-to-Month Home Wi-Fi Price Plans with the Authority on 28 September 2020, which entailed the revision of some of the pricing for the MtM home Wi-Fi price plans. The MTN Home Wi-Fi product plan is a fixed home connectivity solution that allows customers to connect to the internet with

<sup>48</sup> It should be noted that for the purposes of this report, the analysis of Vodacom's Home Internet is limited to month-to-month packages. However, Vodacom also offers 12-month, 24-month and 36-month contractual periods.

the ZTE MF286R router. It is a simple plug and play solution that allows the customer to work and be connected online from home.

Table 31 below shows the price adjustments on the selected plans.

Table 31: MTN Month-to-Month MTN Home Wi-Fi Price Plans

Price plans	Monthly Inclusive value	Current Month-to-Month Subscription (Incl. VAT) with router device	New Month-to-Month Subscription (Incl. VAT) with router device	Price Difference	Variance (%)
MTN Made for Home Wi-fi 150GB TopUp (MTN Home Wi-Fi- 75GB)	75GB Anytime Data and 75GB Night Express Data	R 389	R 299	-R 90	-23.1%
MTN Made for Home Wi-fi 220GB TopUp (MTN Home Wi-Fi- 110GB)	110GB Anytime Data and 110GB Night Express Data	R 519	R 399	-R 120	-23.1%
MTN Made for Home Wi-fi 400GB TopUp (MTN Home Wi-Fi- 200GB)	200GB Anytime Data and 200GB Night Express Data	R 909	R 699	-R 210	-23.1%

Source: ICASA Database based on Tariff Notifications

The price reduction on MTN’s MtM Home Wi-Fi Price Plans had a positive impact on as data plans became more affordable and more accessible, enabling customers to communicate for less and this would assist even employees to work from home with less financial strain due to communication costs during the COVID-19 pandemic and National Disaster period. MTN’s MtM Home Wi-Fi Price Plans are comparable to Vodacom’s Home Internet which was analysed above in 2.7.1. For example, MTN charges R 699 for 200GB of Home Wi-Fi, while Vodacom’s 200GB Home Internet is priced at R 999. This means that Vodacom’s 200GB Home Internet is more expensive than MTN’s 200GB Home Wi-Fi<sup>49</sup> by R 300 or 43%.

It should be noted that MTN’s amendment was filed with respect to the ICT COVID-19 National Disaster Regulations, hence the amendment became effective on 01 October 2020.

<sup>49</sup> Analysed in 2.7.2. below.

### 2.7.3. MTN Prepaid Connected Home Wi-Fi and Bundles

MTN filed its Prepaid Connected Home Wi-Fi and Bundles with the Authority on 28 October 2020. MTN's price plan is a home connectivity solution that allows customers to connect to the internet with a router, enabling customers to work and be connected online from home. The price plan is available to new and existing customers. The usage of the service is subject to the SIM card being connected to an eligible device and purchasing an eligible bundle. Table 32 details the Prepaid Connected Home Wi-Fi bundles.

Table 32: MTN Prepaid Connected Home Wi-Fi and Bundles

<b>MTN PAYG Connected Home Wi-Fi top-up bundles</b>	<b>Once off Inclusive value valid 30 days</b>	<b>Price (Incl. VAT)</b>
MTN connected home Wi-Fi top-up bundle- monthly 10GB	5GB Anytime Data and 5GB Night Express Data	R 99
MTN connected home Wi-Fi top-up bundle- monthly 20GB	10GB Anytime Data and 10GB Night Express Data	R 149
MTN connected home Wi-Fi top-up bundle- monthly 30GB	15GB Anytime Data and 15GB Night Express Data	R 199

Source: ICASA Database based on Tariff Notifications

Customers are charged R 2 per minute, R 0.50 per SMS and R 0.49 per MB on OOB rates. Thus, customers receive more value for money upon purchasing the Prepaid Connected Home Wi-Fi bundles. For example, the 10GB bundle has an in-bundle rate of R 0.01 per MB, saving the customers R 0.48 per MB when compared to the R 0.49 per MB OOB data rate. More information regarding MTN's Prepaid Connected Home Wi-Fi and Bundles can be found on the operator's website<sup>50</sup>.

MTN introduced its Prepaid Connected Home Wi-Fi and Bundles in the market on 30 October 2020.

### 2.7.4. Vodacom Home Internet 5G Data Plan

Vodacom filed the Home Internet 5G Data Plan with the Authority on 05 November 2020. The plan offers customers fixed 5G packages with data bundles ranging

<sup>50</sup> Available online at: < <https://www.mtn.co.za/Pages/Termsandconditions.aspx?pageid=897> > Accessed 24 February 2021.

from 100GB to unlimited data. Customers opting for the MtM packages are subject to the full upfront device cost<sup>51</sup>. Vodacom offers the plan with the Huawei 5G CPE Pro or the Nokia 5G Gateway Fastmile routers. Table 33 below details the MtM Home Internet 5G Data packages.

Table 33: Vodacom Home Internet 5G Month-to-Month Packages

Data Allocation	Night Owl Allocation	Price	OOB Data
100GB	100GB	R 999	R0.44
200GB	200GB	R 1 199	R0.44
300GB	300GB	R 1 399	R0.44
Unlimited	N/A	R 1 699	N/A

Source: ICASA Database based on Tariff Notifications

The data bundles in the capped packages have a 60-day validity period, after which unused data will be forfeited. In the event that customers deplete their data allocation, they will be charged a R 0.44 per MB as the OOB data rate which is R 0.05 less than the standard OOB data rate of R 0.49 per MB. Customers on capped data packages are eligible for the data transfer service. It should be noted that the Home Internet 5G Data Plan may be purchased by customers in areas with sufficient 5G or 4G coverage. Vodacom’s Unlimited Home Internet 5G service is subject to throttling upon reaching 600GB of data usage and the network speeds will be capped at 10Mbps.

Vodacom introduced the Home Internet 5G Data Plan in the market on 09 November 2020<sup>52</sup>.

### **2.7.5. Amobia Wireless to the Home**

The Authority received an Amobia Wireless to the Home tariff notification on 10 December 2020, which offers uncapped asymmetrical internet connectivity. Table 34 below shows Amobia’s Wireless to the Home tariff plan.

<sup>51</sup> It should be noted that Vodacom also offers its Home Internet 5G Data packages on 12-month, 24-month and 36-month contractual periods.

<sup>52</sup> It should be noted that Vodacom filed the Home Internet 5G Data Plan with respect to the ICT COVID-19 National Disaster Regulations (Government Gazette No. 43207), thus Vodacom launched the plan on 09 November 2020.



Table 34: Amobia Wireless-to-the-Home

Product Speed (Mbps)	Price (Incl. VAT)
8/4	R 705
10/5	R 864
15/7.5	R 1 105
20/10	R 1 565

Source: ICASA Database based on Tariff Notifications

Download speeds range from 8 to 20Mbps while the upload speeds range from 4 to 10Mbps. The minimum offer to the customers is an 8/4Mbps line speed for R 705 while the highest line speed, 20/10Mbps is priced at R 1 565. Amobia introduced its Wireless to the Home tariff plan in the market on 18 December 2020.

## 2.8. Month-to-Month Fibre-to-the-Home Tariff Plans

This section analyses Fibre-to-the Home (FTTH) tariff plans offered in the market and the prices charged by the operators, as per notifications filed from 01 July to 31 December 2020. The analysis of the tariff plans will consider the current MtM Self-Built FTTH plans, MtM fibre plans offered through 3<sup>rd</sup> party fibre network operators (FNOs) and promotional offers applicable to MtM contracts offered during the period under review.

### 2.8.1. Self-Built FTTH Offerings

#### 2.8.1.1. VOX Telecoms FTTH

The Authority received Vox Telecoms' FTTH notification on 22 July 2020. The notification entailed tariff adjustments for selected FTTH packages, a discontinuation of selected packages and the introduction of new FTTH packages. VOX Telecoms' price adjustment came to effect on 01 August 2020. More information regarding Vox Telecoms' FTTH can be found on the FNO's website<sup>53</sup>.

Table 35 below details the amendment to the tariffs of the selected packages.

<sup>53</sup> Available online at: < <https://www.vox.co.za/fibre/fibre-to-the-home?prod=HOME> > Accessed 23 February 2021.

Table 35: VOX Telecoms FTTH

Type	Line Speed (Mbps)	Previous Pricing (Incl. VAT)	Current Pricing (Incl. VAT)	Price Difference	Variance (%)
Basic Uncapped	10/10	R 554	R 589	R 35	6.3%
Basic Uncapped	20/20	R 706	R 749	R 43	6.1%
Type	Line Speed (Mbps)	Previous Pricing (Incl. VAT)	Current Pricing (Incl. VAT)	Price Difference	Variance (%)
Basic Uncapped	50/50	R 756	R 799	R 43	5.7%
Basic Uncapped	100/100	R 907	R 999	R 92	10.1%
Basic Uncapped	200/200	N/A	R 1 349	N/A	N/A
Basic Uncapped	300/300	N/A	R 1 549	N/A	N/A
Basic Uncapped	500/500	N/A	R 1 749	N/A	N/A
Basic Uncapped	1000/1000	N/A	R 2 149	N/A	N/A
Pro Uncapped	10/10	R 807	R 839	R 32	4%
Pro Uncapped	20/20	R 907	R 999	R 92	10.1%
Pro Uncapped	50/50	R 1 059	R 1 049	-R 10	-0.9%
Pro Uncapped	100/100	R 1 210	R 1 249	R 39	3.2%

Source: ICASA Database based on Tariff Notifications

The table above shows that some packages had a tariff increase, for example, the Basic Uncapped 100/100Mbps package had a R 92 or 10.1% increase from R 907 to R 999, thus customers incur more cost. However, the 50/50Mbps had a R 10 tariff decrease from R 1 059 to R 1 049, which benefits customers on this package.

### 2.8.1.2. MetroFibre FTTH

MetroFibre filed its FTTH amendment with the Authority on 23 July 2020, wherein it increased the subscription fees for some of its fibre packages, whilst decreasing the price of its 200Mbps offering by R 1 175 or 38.8% from R 3 025 to R 1 850 per month. Prior to these price changes, MetroFibre had not done any price adjustments for over a 2-year period. Table 36 below details the amendment to MetroFibre's FTTH packages.

Table 36: MetroFibre FTTH Packages

Package	Previous Price	Current Price	Price Difference	Variance (%)
5Mbps	R 455	R 470	R 15	3.3%
10Mbps	R 739	R 760	R 21	2.8%
25Mbps	R 1 069	R 1 070	R 1	0.1%
50Mbps	R 1 210	R 1 240	R 30	2.5%
100Mbps	R 1 615	R 1 650	R 35	2.2%
200Mbps	R 3 025	R 1 850	-R 1 175	-38.8%

Source: ICASA Database based on Tariff Notifications

As shown in table 36 above, the highest price increase was 3.3% which was for the 5Mbps line of speed for MetroFibre's FTTH packages. The 25Mbps line of speed incurred the lowest price increase of R 1 or 0.1% from R 1 069 to R 1 070 per month. MetroFibre's price adjustments came to effect on 01 September 2020.

### 2.8.1.3. Telkom Unlimited FTTH

Telkom filed the amendment to its Unlimited FTTH with the Authority on 05 August 2020. Table 37 below shows the amended packages.

Table 37: Telkom Unlimited FTTH Packages

FTTH Packages	Previous Price (Incl. VAT)	New Price (Incl. VAT)	Price Difference	Variance (%)
40Mbps Home Unlimited	R 1 199	R 899	-R 300	-25%
100Mbps Home Unlimited	R 1 499	R 1 169	-R 330	-22%

Source: ICASA Database based on Tariff Notifications

As shown in table 37 above, Telkom reduced the subscription fees for the 40Mbps and 100Mbps Unlimited Home Premium Fibre by R 300 (25%) and R 330 (22%), respectively, thus benefiting customers with lower subscription fees.

The Telkom Unlimited FTTH amendment came to effect on 17 August 2020.

### 2.8.1.4. MetroFibre Retirement Villages Product

MetroFibre's Retirement Villages Product was filed with the Authority on 09 September 2020. The plan offers prospect customers FTTH and voice over internet protocol (VOIP) services<sup>54</sup>. It should be noted that the services are exclusive to

<sup>54</sup> Information regarding MetroFibre's VOIP services can be found on the FNO's website: < <https://metrofibre.co.za/residential/metrovoice/> > Accessed 23 February 2021.

new customers residing in any officially constituted retirement village complex that has an existing and operational MetroFibre Network fibre optic network.

Table 38 below sets out the fibre packages, their monthly subscription fees and fair usage policy (FUP).

Table 38: MetroFibre Retirement Villages Fibre

Line Speed	Price (Incl. VAT)	FUP
5Mbps	R 218.50	80GB
10Mbps	R 349	120GB
25Mbps	R 799.25	200GB
50Mbps	R 1 000.50	250GB
100Mbps	R 1 196	300GB
200Mbps	R 1 552.50	350GB
5Mbps & VoIP Line	R 287.50	80GB

Source: ICASA Database based on Tariff Notifications

MetroFibre offers customers on retirement villages more value for money, for example, the standard uncapped 10Mbps line speed is priced at R 760, while for the retirement villages fibre package for a 10Mbps line speed is priced at R 349, although this has a FUP of 120GB, it is still relatively cheaper by 54.1%.

MetroFibre made the Retirement Villages Product available in the market on 15 September 2020.

## **2.8.2. Fibre Plans offered through 3<sup>rd</sup> Party Fibre Network Operators**

### **2.8.2.1. MWEB on Frogfoot and Openserve FTTH**

MWEB filed an amendment to its FTTH packages on Frogfoot and Openserve networks with the Authority on 09 July 2020. Fibre packages on the Frogfoot network had a tariff increase due to an increase in wholesale costs. MWEB also introduced the Uncapped 500/500Mbps on the Frogfoot network, as shown in table 39 below. Fibre packages on the Openserve network realised an increase in the line speeds without any tariff increases, thus offering better internet connectivity and more value for money to customers. Table 39 details the amendments to MWEB FTTH plan.

Table 39: MWEB FTTH Amendments

Product Description	Previous Line Speed (Mbps)	Current Line Speed (Mbps)	Previous Price	Current Price	Price Difference	Variance (%)
<b>Frogfoot Uncapped Fibre</b>						
Uncapped 10/5Mbps	N/A	10/5	R 549	R 599	R 50	9.1%
Uncapped 20/2Mbps	N/A	20/2	R 659	R 699	R 40	6.1%
Product Description	Previous Line Speed (Mbps)	Current Line Speed (Mbps)	Previous Price	Current Price	Price Difference	Variance (%)
<b>Frogfoot Uncapped Fibre...continued</b>						
Uncapped 10/5Mbps	N/A	10/5	R 549	R 599	R 50	9.1%
Uncapped 50/5Mbps	N/A	50/5	R 799	R 839	R 40	5.0%
Uncapped 100/10Mbps	N/A	100/10	R 899	R 939	R 40	4.4%
Uncapped 200/200Mbps	N/A	200/200	R 1 049	R 1 099	R 50	4.8%
Uncapped 1/1Gbps	N/A	1Gbps	R 1 799	R 1 799	-	-
Uncapped 500/500Mbps	N/A	500/500	N/A	R 1 499	N/A	N/A
<b>Openserve Fibre</b>						
Openserve 10Mbps Lite	10/2	10/5	N/A	R 399	N/A	N/A
Openserve 20Mbps Lite	20/4	20/10	N/A	R 699	N/A	N/A
Openserve 40Mbps Lite	40/10	50/10	N/A	R 849	N/A	N/A
Openserve 10Mbps Std	10/2	10/10	N/A	R 659	N/A	N/A
Openserve 20Mbps Std	20/4	20/20	N/A	R 929	N/A	N/A
Openserve 40Mbps Std	40/10	50/25	N/A	R 1 039	N/A	N/A
Openserve 10Mbps Prem	10/2	10/10	N/A	R 809	N/A	N/A
Openserve 20Mbps Prem	20/4	20/20	N/A	R 1 239	N/A	N/A
Openserve 40Mbps Prem	40/10	50/25	N/A	R 1 439	N/A	N/A

Source: ICASA Database based on Tariff Notifications

On the Frogfoot fibre, the Uncapped 10/5Mbps line speed had the largest tariff increase in percentage terms, as it increased by 9.1 % from R 549 to R 599. In absolute value terms, the Uncapped 200/200Mbps and 10/5Mbps had the largest increase of R 50.

MWEB's amendment to the Frogfoot fibre came to effect on 01 August 2020, while the amendment on the Openserve fibre was effective on 22 July for existing customers and on 01 September 2020 for new customers.

### 2.8.2.2. Directel Communications on Frogfoot FTTH

Directel Communications ("Directel") filed the notification with the Authority on 20 July 2020 regarding its 3<sup>rd</sup> party fibre plans from the Frogfoot network, wherein it amended the subscription fees of the Frogfoot fibre packages, due to an increase in the costs from the 3<sup>rd</sup> Party network provider. Table 40 shows the fibre offerings filed by Directel on the Frogfoot network.

Table 40: Directel on Frogfoot FTTH

Line Speed (Mbps)	Price
Apollo 10/10	R 745
Apollo 20/20	R 845
Apollo 50/50	R 945
Apollo 100/100	R 1 045
Apollo 200/200	R 1 195

Source: ICASA Database based on Tariff Notifications

Directel's prices are higher when compared to Amobia on Frogfoot FTTH, for example, Amobia's 10/10Mbps FTTH on Frogfoot's network analysed in the 2020/21 FY Q2 Bi-Annual Tariff Analysis Report<sup>55</sup> is priced at R 625, while, Directel's Apollo 10/10Mbps FTTH line speed is offered for R 745, which is higher by R 120 or 19.2%.

Directel's amendment of its Frogfoot FTTH offer came into effect on 01 August 2020.

### 2.8.2.3. Vodacom Fibre on Vuma Reach Network

Vodacom filed its prepaid FTTH on the Vuma Reach Network with the Authority on 21 July 2020. Customers are offered a 20/10Mbps fibre service on a prepaid Vuma Reach Network plan, which is available as a 28-day or monthly recurring service at a price of R 399. This package offers uncapped fibre internet connectivity, however it is subject to FUP, which can be found on Vodacom's website<sup>56</sup>.

<sup>55</sup> Page 70, available on ICASA's website: <<https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020>> Accessed on 23 February 2021

<sup>56</sup> Available online at: <<https://www.vodacom.co.za/vodacom/terms/fibre/vodacom-fibre>> Accessed 23 February 2021.

Vodacom introduced its fibre package on the Vuma Reach Network in the market on 28 July 2020.

#### 2.8.2.4. Telkom on Link Africa FTTH

On 22 July 2020, the Authority received Telkom’s amendment to its FTTH packages on the Link Africa network. The amendment entailed a reduction in subscription fees of the fibre packages following the revised wholesale tariffs from the 3<sup>rd</sup> party FNO, Link Africa. Telkom also introduced new symmetrical Unlimited Lite fibre packages ranging from 10Mbps to 100Mbps.

Table 41 below shows Telkom’s amendment to its Link Africa FTTH.

Table 41: Telkom on Link Africa FTTH

Fibre Line Speed (Mbps)	Previous Price (Incl. VAT)	Current Price (Incl. VAT)	Price Difference	Variance (%)
<b>Home and Business 100GB Softcap</b>				
10/10	R 755.57	R 599	-R 156.57	-20.7%
<b>Unlimited Home</b>				
10/10	R 806.01	R 699	-R 107.01	-13.3%
20/20	R 1 007.77	R 849	-R 158.77	-15.8%
50/50	R 1 310.39	R 999	-R 311.39	-23.8%
100/100	R 1 713.90	R 1 199	-R 514.90	-30%
<b>Unlimited Lite</b>				
10/10	N/A	R 649	N/A	N/A
20/20	N/A	R 799	N/A	N/A
50/50	N/A	R 899	N/A	N/A
100/100	N/A	R 1 099	N/A	N/A

Source: ICASA Database based on Tariff Notifications

Table 41 above shows that Telkom customers who subscribe to the Link Africa FTTH package have benefitted due to reduced subscription fees. The Unlimited Home 100/100Mbps realised the greatest tariff decline of R 514.90 (30%) from R 1 713.90 to R 1 199.

The amendment came to effect on 01 August 2020.

#### 2.8.2.5. MTN on Vuma Reach FTTH

MTN filed the Vuma Reach 40/10Mbps package with the Authority on 27 July 2020. The package is available as a once-off/prepaid package at a subscription fee of

R 529. The plan provides customers with flexibility of opting in and out of the service at their own discretion. MTN introduced this 40/10Mbps Vuma Reach FTTH plan in the market 01 August 2020.

### 2.8.2.6. MWEB on Octotel FTTH

The Authority received the amendment on MWEB's FTTH on the Octotel network on 30 July 2020. The amendment entailed an increase in the line speeds and subscription fees of the fibre packages. MWEB absorbed some of the costs it incurred from upstream provider, Octotel, as it aimed to make the fibre packages affordable. Table 42 below details the changes on MWEB's capped and uncapped fibre plans on the Octotel network.

Table 42: MWEB on Octotel FTTH

Product Description	Previous Line Speed (Mbps)	Current Line Speed (Mbps)	Previous Price	Current Price	Price Difference	Variance (%)
<b>Octotel Uncapped Fibre</b>						
Uncapped 10Mbps	10/5	15/15	R 589	R 649	R 60	10.2%
Uncapped 10/10Mbps	10/10	15/15	R 719	R 649	-R 70	-9.7%
Uncapped 20Mbps	20/5	30/30	R 699	R 779	R 80	11.4%
Uncapped 20/20Mbps	20/20	30/30	R 819	R 779	-R 40	-4.9%
Uncapped 100Mbps	100/25	100/100	R 949	R 979	R 30	3.2%
Uncapped 100/100Mbps	100/100	100/100	R 1 189	R 979	-R 210	-17.7%
Uncapped 200Mbps	200/25	200/200	R 1 149	R 1 149	-	-
Uncapped 200/200Mbps	200/200	200/200	R 1 309	R 1 149	-R 160	-12.2%
<b>Octotel Capped Fibre</b>						
50GB + Uncapped Night Time Data + 10Mbps	10/5	15/15	R 619	R 689	R 70	11.3%
100GB + Uncapped Night Time Data + 10Mbps	10/5	15/15	R 669	R 739	R 70	10.5%
200GB + Uncapped Night Time Data + 10Mbps	10/5	15/15	R 719	R 789	R 70	9.7%
100GB + Uncapped Night Time Data + 20Mbps	20/5	30/15	R 739	R 839	R 100	13.5%
200GB + Uncapped Night Time Data + 20Mbps	20/5	30/15	R 799	R 899	R 100	12.5%



100GB + Uncapped Night Time Data + 100Mbps	100/25	100/50	R 849	R 939	R 90	10.6%
200GB + Uncapped Night Time Data + 100Mbps	100/25	100/50	R 909	R 999	R 90	9.9%
500GB + Uncapped Night Time Data + 100Mbps	100/25	100/50	R 1 069	R 1 159	R 90	8.4%

Source: ICASA Database based on Tariff Notifications

The largest tariff decline of R 210 (17.7%) was realised on the Uncapped 100/100Mbps package, from R 1 189 to R 979. Conversely, the largest tariff increase of R 100 (13.5%) was realised on the Capped 30/15Mbps package, from R 739 to R 839. MWEB's amendments came to effect on 10 August 2020 for new customers, and 01 September 2020 for existing customers.

### 2.8.2.7. Cell C C-Fibre on Openserve FTTH

Cell C filed amendments to its Openserve C-Fibre Tariff Plan with the Authority on 03 August 2020 and on 26 November 2020, wherein it updated the terms and conditions of the Plan. The amendment on 03 August entailed an improvement in line speeds of the first three of the Cell C C-Fibre on Openserve FTTH packages, the C-Fibre 100/50Mbps and 200/100Mbps FTTH packages remained unchanged as was analysed in the previous 2020/21 Q2 Bi-Annual Tariff Analysis Report<sup>57</sup>.

Table 43 below details the price changes and the new line speeds of the Cell C C-Fibre on Openserve FTTH packages.

Table 43: Cell C C-Fibre on Openserve FTTH

FTTH Packages	Previous Price (Incl. VAT)	New Price (Incl. VAT)	Price Difference	Variance (%)
C-Fibre 10/10Mbps	R 729	R 699	-R 30	-4.1%
C-Fibre 20/20Mbps	R 879	R 799	-R 80	-9.1%
C-Fibre 50/25Mbps	R 1 029	R 899	-R 130	-12.6%
C-Fibre 100/50Mbps	R 1 329	R 1 199	-R 130	-9.8%
C-Fibre 200/100Mbps	R 2 029	R 1 499	-R 530	-26.1%

Source: ICASA Database based on Tariff Notifications

<sup>57</sup> Page 72, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020> > Accessed on 15 February 2021

The amendment on 26 November 2020 saw price decreases across all Openserve C-Fibre Tariff Plans, ranging from 4.1% for the C-Fibre 10/10Mbps FTTH package to 26.1% for the C-Fibre 200/100Mbps FTTH package. Cell C C-Fibre on Openserve 10/10Mbps FTTH package can be compared to Cybersmart’s Openserve Uncapped Premium Fibre FTTH which is priced at R 629, meaning it is priced less than Cell C package by R 70 or 10%.

The amendment of Cell C C-Fibre on Openserve became effective on 01 December 2020.

### 2.8.2.8. Cybersmart FTTH

The Authority receive five tariff notifications regarding Cybersmart’s amendments to its FTTH plan on 08 August, 27 August, 07 September, 11 December and 24 December 2020.

On 08 August and 24 December 2020, Cybersmart filed amendments to its Openserve Uncapped Premium Fibre plan. On 27 August 2020 Cybersmart filed new FTTH packages on Frogfoot’s infrastructure. The Authority also received Cybersmart’s amendment to the Openserve Uncapped Lite FTTH on 07 September 2020. On 11 December 2020, the FNO introduced its Global Access Service.

Table 44 below details Cybersmart FTTH tariff notifications received in the period under review.

Table 44: Cybersmart FTTH Amendments

Previous Line Speed	Current Line Speed	Previous Price	Current Price (Incl. VAT)	Price Difference	Price Difference (%)
<b>Openserve Uncapped Premium Fibre (filed on 08 August 2020 and 24 December 2020)</b>					
Up to 10Mbps	10/10Mbps	R 865	R 629	-R 236	-27.3%
Up to 20Mbps	20/20Mbps	R 1 215	R 799	-R 416	-34.2%
Up to 40Mbps	50/25Mbps	R 1 415	R 999	-R 416	-29.4%
Up to 100Mbps	100/50Mbps	R 1 615	R 1 199	-R 416	-25.8%
Up to 200Mbps	200/100Mbps	R 1 915	R 1 489	-R 426	-22.2%
<b>Frogfoot FTTH (filed on 27 August 2020)</b>					
N/A	10/10Mbps	N/A	R 749	N/A	N/A
	20/20Mbps		R 809		
	50/50Mbps		R 889		
	100/100Mbps		R 989		
	200/200Mbps		R 1 039		
	500/500Mbps		R 1 389		
1000/1000Mbps	R 1 789				

<b>Openserve Uncapped Lite Fibre (filed on 07 September 2020)</b>					
Up to 10Mbps	10/10Mbps	R 655	R 529	-R 126	-19.2%
Up to 20Mbps	20/20Mbps	R 905	R 699	-R 206	-22.8%
Up to 40Mbps	50/25Mbps	R 1 115	R 899	-R 216	-19.4%
Up to 100Mbps	100/50Mbps	R 1 305	R 1 099	-R 206	-15.8%
Up to 200Mbps	200/100Mbps	R 1 515	R 1 389	-R 126	-8.3%
<b>Global Access Service Fibre (filed on 11 December 2020)</b>					
N/A	10/10Mbps	N/A	R 469	N/A	N/A
	50/50Mbps		R 679		
	100/100Mbps		R 969		
	250/250Mbps		R 1 239		
<b>Lightstruck Uncapped Fibre (filed on 22 December 2020)</b>					
N/A	20/20Mbps		R 629		
	50/50Mbps	R 789	R 829	R 40	5.1%

Source: ICASA Database based on Tariff Notifications

The amendment of the Cybersmart on Openserve Uncapped Premium Fibre follows the notification filed with the Authority on 20 June 2018. On 04 August 2020, the FNO increased the line speeds of the fibre packages while subscription fees remain unchanged, thus benefiting customers with higher internet speeds. The amendment came to effect on 01 September 2020.

On 27 August 2020, the FNO filed new FTTH packages on Frogfoot's infrastructure. Cybersmart offers symmetrical FTTH packages ranging from 10Mbps to 1Gbps, as detailed in table 44. The Cybersmart on Frogfoot packages were introduced in the market on 07 September 2020.

Cybersmart also filed a notification to amend its Openserve Uncapped Lite FTTH on 07 September 2020. Following the reduction in wholesale tariffs, the operator passed on the benefit to customers in a form of reduced retail prices as shown in table 44. Cybersmart's amendment to the Openserve Uncapped Lite FTTH became effective on 17 September 2020.

Cybersmart's Global Access Service fibre was filed with the Authority on 11 December 2020, wherein it offers FTTH with symmetrical line speeds ranging from 10Mbps to 250Mbps. Cybersmart launched the Global Access Service fibre in the market on 01 January 2021.

Cybersmart's amendment on Lightstruck FTTH entailed increasing the subscription fees of the 20/20Mbps and 50/50Mbps packages to be in line with market pricing.

The 50/50Mbps package realised a 5.1% (R 40) tariff increase, from R 789 to R 829, as show in table 44. The amendment came to effect on 01 January 2021.

On 24 December 2020, Cybersmart amended its Openserve Uncapped Premium Fibre, reducing the subscription fees of the packages. The largest price reduction in absolute value terms was realised on the 200/100Mbps package, with the price falling by R 426 (22.2%) from R 1 915 to R 1 489. The 20/20Mbps package realised the largest decrease in percentage terms of 34.2% (R 416) from R 1 215 to R 799. The amendment on the Openserve Uncapped Premium Fibre came to effect on 01 January 2021.

### 2.8.2.9. Amobia on MetroFibre FTTH

The Authority received the Amobia on MetroFibre FTTH packages on 12 August 2020. Amobia offers uncapped packages with symmetrical line speeds ranging from 5Mbps to 200Mbps, offered on a MtM basis. It is worth noting that the installation and activation services are charged separately from the subscription fees. The new FTTH packages launched in the market on 24 August 2020. Table 45 below shows the Amobia FTTH packages on the MetroFibre network.

Table 45: Amobia on MetroFibre FTTH Packages

Line Speed	Selling Price
5/5Mbps	R 539
10/10Mbps	R 649
25/25Mbps	R 799
50/50Mbps	R 969
100/100Mbps	R 1 199
200/200Mbps	R 1 349

Source: ICASA Database based on Tariff Notifications

The growing fibre market offers customers product variety and competitive prices. For example, MTN's 5/5Mbps Supersonic on MetroFibre FTTH analysed in the 2020/21 FY Q2 Bi-Annual Tariff Analysis Report<sup>58</sup> is priced at R 595 while Amobia offers its 5/5Mbps MetroFibre FTTH package for R 539, which is priced at R 56 or 10.4% less.

<sup>58</sup> Page 87, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020> > Accessed 23 February 2021.

### 2.8.2.10. MWEB on MetroFibre FTTH

The Authority received a notification for an amendment of MWEB's FTTH on the MetroFibre network on 20 August 2020. This amendment entailed a subscription fee increase, due to a wholesale level price increase from its 3<sup>rd</sup> party FTTH plan. Table 46 below details the subscription fee changes.

Table 46: MWEB on MetroFibre FTTH

Line Speed (Mbps)	Data Cap	Old Price	New Price	Price Difference	Variance (%)
<b>MFN Uncapped</b>					
10/10	Uncapped	R 599	R 649	R 50	8.3%
25/25		R 799	R 829	R 30	3.8%
<b>MFN Capped</b>					
10/10	100GB	R 629	R 689	R 60	9.5%
5/5	50GB	R 579	R 615	R 36	6.2%
25/25	200GB	R 779	R 839	R 60	7.7%
50/50	500GB	R 979	R 999	R 20	2%

Source: ICASA Database based on Tariff Notifications

The highest tariff increase as shown in table 48 above, in both absolute value and percentage terms of R 60 or 9.5%, was incurred in the 10/10Mbps capped fibre package. The 50/50Mbps capped fibre package, had the lowest increase of R 20 or 2%. MWEB's amendment to the MetroFibre FTTH plan will come to effect on 01 October 2020.

### 2.8.2.11. MWEB on Vuma Reach 40Mbps Package

MWEB filed the Vuma Reach 40Mbps package with the Authority on 20 August 2020. The plan offers uncapped 40/10Mbps Vuma Reach fibre and is available as a once-off 28-day package or a monthly recurring package at a subscription fee of R 549. It should be noted that the plan was initially introduced in the market as a promotional offer when it was filed, with a subscription fee of R 529, valid from 01 September 2020 to 01 December 2020. When the promotion expired it became a standard FTTH plan with a subscription fee of R 549 per month.

### 2.8.2.12. Cell C C-Fibre on Octotel FTTH

Cell C filed an amendment to its C-Fibre Tariff Plan with the Authority on 24 August 2020, wherein it amended line speeds by introducing 15Mbps and 30Mbps, which replace the previous 10Mbps and 20Mbps packages. Table 47 below shows the amendments to Cell C's fibre packages on Octotel's network.

Table 47: Cell C C-Fibre on Octotel Tariff Plan and Line Speed

FTTH Packages	Previous Price (Incl. VAT)	New Line Speed	New Price (Incl. VAT)	Price Difference	Variance (%)
C-Fibre 10/5Mbps	R 599	C-Fibre 15/15Mbps	R 729	N/A	N/A
C-Fibre 10/10Mbps	R 729			N/A	N/A
C-Fibre 20/20Mbps	R 799	C-Fibre 30/30Mbps	R 849	N/A	N/A
C-Fibre 100/25Mbps	R 899	C-Fibre 100/100Mbps	R 1 099	N/A	N/A
C-Fibre 100/100Mbps	R 1 199			-R 100	-8%
C-Fibre 200/25Mbps	R 1 399	C-Fibre 200/200Mbps	R 1 449	N/A	N/A
C-Fibre 200/200Mbps	R 1 449			R 0	0
C-Fibre 1000/25Mbps	R 1 899	C-Fibre 1000/25Mbps	R 1 899	R 0	0

Source: ICASA Database based on Tariff Notifications

The price amendment on the 100/100Mbps package, benefited customers as it resulted in a R 100 or 8.3% decrease. Customers on the 15/15Mbps package benefited by getting a higher speed package for the same price which was previously charged for the 10/10Mbps package. Cell C's C-Fibre on Octotel Tariff Plan can be compared to MTN's Supersonic on Octotel Fibre, whereby Cell C offers lower prices on the 15/15Mbps, 30/30Mbps and on the 1000/25Mbps packages, by 2.7%, 5.6% and 5%, respectively. Cell C's C-Fibre on Octotel prices are higher than MTN's Supersonic on Octotel Fibre for the 200/200Mbps package by 16%.

The amendment came into effect on 01 September 2020.

### 2.8.2.13. Cell C on MetroFibre FTTH

Cell C filed an amendment to its C-Fibre MetroFibre Tariff Plan with the Authority on 24 August 2020, wherein it increased its subscription fees for all but the 50Mbps

and 100Mbps packages. Table 48 below shows the amendment to the C-Fibre MetroFibre Tariff Plan.

Table 48: Cell C C-Fibre on MetroFibre Tariff Plan

FTTH Packages	Previous Price (Incl. VAT)	New Price (Incl. VAT)	Price Difference	Variance (%)
C-Fibre 10/10Mbps	R 649	R 719	R 70	10.8%
C-Fibre 25/25Mbps	R 799	R 849	R 50	6.3%
C-Fibre 50/50Mbps	R 999	R 999	R 0	0%
C-Fibre 100/100Mbps	R 1 199	R 1 199	R 0	0%
C-Fibre 200/200Mbps	R 1 499	R 1 899	R 400	26.7%

Source: ICASA Database based on Tariff Notifications

Cell C's on MetroFibre FTTH can be compared with MWEB's on MetroFibre FTTH<sup>59</sup>, wherein Cell C has higher prices by 4.4% and 1.2% on the 10/10Mbps and 25/25 Mbps line of speeds, respectively. The amendment came into effect on 01 September 2020.

#### 2.8.2.14. Cybersmart on Frogfoot FTTH Packages

Cybersmart introduced its Frogfoot symmetrical FTTH Packages which range from 10Mbps to 1000Mbps with the Authority on 27 August 2020. Table 49 below sets out the Cybersmart's Frogfoot FTTH packages.

Table 49: Cybersmart on Frogfoot FTTH Packages

Line Speed (Mbps)	Subscription Fee (Incl. VAT)
10/10	R 749
20/20	R 809
50/50	R 889
100/100	R 989
200/200	R 1 039
500/500	R 1 389
1000/1000	R 1 789

Source: ICASA Database based on Tariff Notifications

Cybersmart's 20/20Mbps package, can be compared to Amobia and Directel's FTTH on the same third party FNO, Frogfoot, whereby Cybersmart offers the 20/20Mbps package for R 809, while Amobia offers the same line speed for

<sup>59</sup> Analysed in 2.8.2.10. above

R 795<sup>60</sup>, which is 17.3% less than Cybersmart’s price. Directel charges R 845<sup>61</sup> which is 4.4% more than what Cybersmart charges.

Cybersmart launched the Frogfoot FTTH plan on 07 September 2020.

### 2.8.2.15. Cell C C-Fibre on Link Africa FTTH

Cell C filed its Link Africa C-Fibre Plan with the Authority on 27 August 2020. Cell C’s Link Africa C-Fibre Plan is an uncapped service which offers a high-speed fibre broadband connectivity on the open access network through a partnership with Link Africa. FTTH packages on the Cell C C-Fibre on Link Africa Plan have download and upload speeds ranging from 10Mbps to 200Mbps. The use of the Cell C C-Fibre on Link Africa FTTH Plan is on a MtM basis until such time as it is cancelled either by the customer or Cell C. Table 50 below shows the C-Fibre on Link Africa FTTH.

Table 50: Cell C C-Fibre on Link Africa FTTH Plan

FTTH Packages	Price (Incl. Vat)
C-Fibre 10/10Mbps	R 659
C-Fibre 20/20Mbps	R 749
C-Fibre 50/50Mbps	R 779
C-Fibre 100/100Mbps	R 929
C-Fibre 200/200Mbps	R 1 199

Source: ICASA Database based on Tariff Notifications

Cell C C-Fibre on Link Africa FTTH is comparable to Telkom on Link Africa FTTH Unlimited Home<sup>62</sup>, whereby the Cell C C-Fibre on Link Africa 10/10Mbps, is priced at R 659, which is 6% lower than the equivalent 10/10Mbps package on Telkom on Link Africa FTTH. The price difference is greater on the Cell C C-Fibre on Link Africa 100/100Mbps, which is priced at R 929 or 23% lower than the equivalent Telkom on Link Africa Unlimited Home FTTH package.

The Cell C C-Fibre on Link Africa was launched in the market on 01 September 2020.

<sup>60</sup> ICASA., (2021). 2020/21FY Q2 Bi-Annual Tariff Analysis Report; < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020> >, page 70, Accessed on 23 February 2021.

<sup>61</sup> Analysed in 2.8.2.2. above

<sup>62</sup> Analysed in 2.8.2.4. above



### 2.8.2.16. Cell C Vumatel Village C-Fibre FTTH

Cell C filed its Vumatel Village C-Fibre Plan with the Authority on 27 August 2020, which offers an uncapped service, however Cell C reserves the right, at any time, to implement a Fair Usage Policy in order to regulate the abuse of the product. The use of the Cell C Vumatel Village C-Fibre Plan is on a MtM basis until such time as it is cancelled either by the customer or Cell C. Customers should note that Cell C does not own the fibre network, the fibre lines are owned by the Fibre Network Operator, therefore customers wishing to move from one Fibre Network Operator to another but retain Cell C as an Internet Service Provider will be charged an installation and connection fee.

Table 51 below details Cell C's C-Fibre on the Vumatel network.

Table 51: Cell C C-Fibre on Vumatel Village FTTH

FTTH Packages	Price (Incl. Vat)
C-Fibre 10Mbps/10Mbps	R 829
C-Fibre 20Mbps/2Mbps	R 929
C-Fibre 20Mbps/20Mbps	R 949
C-Fibre 50Mbps/50Mbps	R 1 099
C-Fibre 100Mbps/100Mbps	R 1 199
C-Fibre 200Mbps/200Mbps	R 1 419
C-Fibre 1Gbps/100Mbps	R 1 499

Source: ICASA Database based on Tariff Notifications

Cell C C-Fibre on Vumatel Village FTTH can be compared to the MWEB on Vumatel FTTH package<sup>63</sup>. The Cell C C-Fibre on Vumatel Village FTTH 10Mbps/10Mbps is priced at R 829 which is 12.2% higher than the MWEB on Vumatel 10Mbps/10Mbps FTTH which is priced at R 739. On the 100Mbps/100Mbps FTTH packages, the Cell C C-Fibre on Vumatel Village FTTH is priced at R 1 199, which is 15% lower than the price of the MWEB on Vumatel 100Mbps/100Mbps FTTH.

Cell C's Vumatel Village C-Fibre Plan was launched in the market on 01 September 2020.

<sup>63</sup> Analysed in 2.8.2.20. below

### 2.8.2.17. MTN Supersonic on Octotel FTTH Service

MTN filed an amendment of its Supersonic on Octotel FTTH Service with the Authority on 07 September 2020. The amendment comprised of an increase in line speeds and price adjustments of the Octotel fibre packages which was due to the conversion of some of the asymmetrical line speeds to symmetrical fibre line speeds with the exception of the 1000/25Mbps package.

Table 52 below shows the Supersonic on Octotel fibre plan.

Table 52: MTN Supersonic on Octotel Fibre

Line Speed (Mbps)	Previous Price	Current Price	Price Difference	Variance (%)
<b>Discontinued Octotel FTTH Packages</b>				
10/5	R 645	Discontinued	N/A	N/A
10/10	R 729			
20/5	R 795			
100/25	R 999			
200/25	R 1 395			
<b>Current Octotel FTTH Packages</b>				
15/15	-	R 749	N/A	N/A
30/30	-	R 899	N/A	N/A
100/100	R 1 195	R 1 099	-R 96	-8%
200/200	R 1 349	R 1 249	-R 100	-7.4%
1000/25	R 999	R 1 999	R 1 000	100.1%

Source: ICASA Database based on Tariff Notifications

The highest tariff increase of R 1 000 or 100.1% was from the 1000/25Mbps package, while the largest tariff absolute rand value decrease of R 100 or 7.4% was from the 200/200Mbps package.

It should be noted that the amendments were initially filed to be applicable to new customers on 09 September 2020 and for existing customers on 09 October 2020. However, MTN filed another notification on 14 September 2020 to suspend the implementation of the change for new customers until further notice due to technical reasons. Therefore, MTN's amendment was only applicable to existing customers and it came into effect on 09 October 2020. On 22 September 2020, MTN filed a notification to implement the amendment on new customers, and this became effective on 25 September 2020.

### 2.8.2.18. SADV Fast Fibre

The Authority received an amendment to SADV's Fast Fibre plan on 29 October 2020 wherein it introduced a new set of tariffs for customers willing to pay the non-recurring costs upfront for a reduced monthly subscription.

Table 53 below shows the SADV fibre packages and their respective subscription fees.

Table 53: SADV Fast Fibre

Line Speed (Mbps)	Zero Up-front Connection Fee	Zero Up-front Monthly Subscription	New Connection Fee	New Monthly Subscription
10/2	R 0	R 695	R 1 875	R 625
10/10		R 755	R 1 390	R 695
10/2		R 845	R 1 590	R 795
20/20		R 915	R 1 690	R 845
50/5		R 995	R 1 879	R 935
50/50		R 1 055	R 1 970	R 985
100/10		R 1 145	R 2 190	R 1 095
100/100		R 1 225	R 2 350	R 1 175
200/20		R 1 435	R 2 590	R 1 295
200/200		R 1 485	R 2 790	R 1 395
1000/100		R 1 495	N/A	N/A

Source: ICASA Database based on Tariff Notifications

It can be deduced from the table above that the 10/10Mbps package, for example, costs customers R 755 if they do not pay upfront for the non-recurring costs, however, if they are willing to do an upfront payment of R 1 390 for the non-recurring costs then the monthly charges reduce to R 695.

SADV's amendment came to effect on the 13 November 2020.

### 2.8.2.19. MWEB on Vodacom and MetroFibre FTTH

On 03 November 2020, MWEB filed its new FTTH packages on Vodacom and MetroFibre. Fibre packages on the Vodacom network comprise of uncapped asymmetrical and symmetrical fibre packages, with download speeds ranging from 10Mbps to 200Mbps and upload speeds ranging from 5Mbps to 200Mbps. The fibre package on the MetroFibre network is an introduction of the uncapped symmetrical

200Mbps package. MWEB aims to increase its fibre footprint and give customers more product choice.

Table 54 below details the new MWEB on Vodacom and MetroFibre fibre packages.

Table 54: MWEB on Vodacom and MetroFibre FTTH

Line Speed (Mbps)	Price (Incl. VAT)
<b>Vodacom Fibre</b>	
10/5	R 599
20/10	R 779
40/20	R 949
100/50	R 1 099
200/100	R 1 299
10/10	R 679
20/20	R 839
40/40	R 989
100/100	R 1 189
200/200	R 1 399
<b>MetroFibre Networx</b>	
200/200	R 1 349

Source: ICASA Database based on Tariff Notifications

MWEB's FTTH on Vodacom's network can be compared to MTN's Supersonic on Vodacom FTTH plan which was analysed in the 2020/21 FY Q2 Bi-Annual Tariff Analysis Report<sup>64</sup>. For example, MTN's 10/5Mbps and 20/10Mbps packages are priced at R 645 and R 899, respectively, while MWEB offers the similar line speeds for R 599 and R 779. Thus, the packages differ by R 46 or 7.7% and R 120 or 15.4%, respectively.

The MWEB on Vodacom and MetroFibre FTTH plans were introduced in the market on 12 November 2020.

#### **2.8.2.20. MWEB FTTH Products**

MWEB's amendment filed with the Authority on 18 November 2020 entailed an increase in prices for selected fibre packages on Vumatel, Telkom and Octotel. The increase in prices was due to increased input costs from the 3<sup>rd</sup> party FNOs, and it is applicable to all existing and new customers.

<sup>64</sup> Page 87-90, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020> > Accessed 23 February 2021.

Table 55 below sets out the amendment to MWEB's FTTH packages.

Table 55: MWEB FTTH Packages

Product	Previous Price	Current Price	Price Difference	Variance (%)
<b>Vumatel</b>				
Uncapped 10Mbps	R 629	R 639	R 10	1.6%
Uncapped 10/10Mbps	R 729	R 739	R 10	1.4%
Uncapped 100/10Mbps	R 1 069	R 1 089	R 20	1.9%
Uncapped 100/100Mbps	R 1 389	R 1 409	R 20	1.4%
<b>Telkom</b>				
LITE 10Mbps Lite	R 399	R 449	R 50	12.5%
LITE 50Mbps Lite	R 849	R 859	R 10	1.2%
<b>Octotel</b>				
15/15Mbps	R 649	R 679	R 30	4.6%

Source: ICASA Database based on Tariff Notifications

Table 55 above shows that Telkom as one of MWEB's 3<sup>rd</sup> party FNO had the largest tariff increase in both absolute and percentage terms for its 10Mbps package, as it increased by R 50 (12.5%) from R 399 to R 449. The lowest price increase of 1.2% was also from the Telkom for its 50Mbps line speed.

MWEB's amendment came to effect on 01 December 2020 for new customers and 01 January 2021 for existing customers.

### 2.8.2.21. Amobia Buh-Rein FTTH

Amobia filed an amendment to its Buh-Rein estate FTTH packages with the Authority on 18 November 2020. The amendment entailed a tariff decrease and an increase in the upload speed for the 200/25Mbps package to 200/100Mbps, thus benefitting the Buh-Rein residents with more value for money.

Table 56 below details the amendment.

Table 56: Amobia on Buh-Rein FTTH

Previous Line Speed (Mbps)	Current Line Speed (Mbps)	Previous Price (Incl. VAT)	Current Price (Incl. VAT)	Price Difference	Variance (%)
200/200	200/200	R 1 250	R 1 100	-R 150	-12%
200/25	200/100	R 1 099	R 1 050	-R 49	-4.5%

Source: ICASA Database based on Tariff Notifications

Amobia’s tariff change resulted in a price reduction of R 150 or 12% for the 200/200Mbps line speed from R 1 250 to R 1 100, while the 200/25Mbps line speed incurred a reduction of R 45 or 4.5% from R 1 099 to 1 050.

Amobia’s amendment came to effect on 27 November 2020.

### 2.8.2.22. Cell C C-Fibre on Mitsol FTTH

Cell C filed an amendment to its C-Fibre on Mitsol Tariff Plan with the Authority on 26 November 2020, wherein it included two additional tariff plans (5/5Mbps and 200/200Mbps), updated the terms and conditions of the plan and implemented decreases in monthly rental prices of the previously existing plans ranging from 5% to 12%.

Table 57 below shows the price adjustments which were filed during the period under review for the Cell C C-Fibre on Mitsol FTTH plan.

Table 57: Cell C C-Fibre on Mitsol FTTH

FTTH Packages	Previous Price (Incl. VAT)	New Price (Incl. VAT)	Price Difference	Variance (%)
C-Fibre 5Mbps/5Mbps	N/A	R 599	N/A	N/A
C-Fibre 10Mbps/10Mbps	R 749	R 659	-R 90	-12%
C-Fibre 20Mbps/20Mbps	R 799	R 749	-R 50	-6.3%
C-Fibre 50Mbps/50Mbps	R 899	R 849	-R 50	-5.6%
C-Fibre 100Mbps/100Mbps	R 999	R 949	-R 50	-5%
C-Fibre 200Mbps/200Mbps	N/A	R 1 249	N/A	N/A

Source: ICASA Database based on Tariff Notifications

Cell C C-Fibre on Mitsol’s new entry level 5/5 Mbps package can be compared to similar packages in the market, namely the MetroFibre FTTH which costs 21.5% less, Amobia on MetroFibre FTTH<sup>65</sup> which costs 10% less and the MWEB on MetroFibre FTTH<sup>66</sup> package which costs 2.7% more.

The amendment came into effect on 01 December 2020.

<sup>65</sup> Analysed in 2.8.2.9. above

<sup>66</sup> Analysed in 2.8.2.10. above

### 2.8.2.23. Cell C C-Fibre on Vumatel FTTH

Cell C filed an amendment to its C-Fibre Vumatel FTTH Tariff Plan with the Authority on 26 November 2020, wherein it included an additional package and updated the terms and conditions of the plan.

Table 58 below shows the price adjustments and the inclusion of the new Cell C C-Fibre on Vumatel FTTH package which was filed during the period under review.

Table 58: Cell C C-Fibre on Vumatel FTTH

FTTH Packages	Previous Price (Incl. VAT)	New Price (Incl. VAT)	Price Difference	Variance (%)
C-Fibre 10/10Mbps	R 829	R 799	-R 30	-3.6%
C-Fibre 20/2Mbps	R 929	R 889	-R 40	-4.3%
C-Fibre 10/2Mbps	N/A	R 720	N/A	N/A

Source: ICASA Database based on Tariff Notifications

The amendment saw price decreases of 3.6% and 4.3% to the Cell C C-Fibre on Vumatel FTTH 10/10Mbps and the 20/2Mbps packages, respectively and also a new 10Mbps/2Mbps FTTH line speed was introduced at a price of R 720 per month. There are various fibre plans offered through the Vumatel network that can be compared to the Cell C C-Fibre on Vumatel FTTH. The 10/10Mbps FTTH package on Cell C C-Fibre on Vumatel FTTH is now priced at R 799 is 3.7% lower than the 10/10Mbps FTTH package on Cell C Vumatel Village C-Fibre<sup>67</sup> which is priced at R 829 which is 7.5% higher than the 10/10Mbps MWEB on Vumatel FTTH<sup>68</sup> package which is priced at R 739. The amendment became effective on 01 December 2020.

### 2.8.2.24. MWEB on Evotel FTTH

MWEB filed an amendment to its third party FTTH plan on Evotel with the Authority on 30 November 2020. The ISP added uncapped FTTH packages with download speeds ranging from 10Mbps to 100Mbps and upload speed ranging from 5Mbps to 100Mbps. Table 59 below shows the fibre packages and their respective prices.

<sup>67</sup> Analysed in 2.8.2.16. above

<sup>68</sup> Analysed in 2.8.2.20. above

Table 59: MWEB on Evotel FTTH

Line Speed (Mbps)	Previous Price (Incl. VAT)	Current Price (Incl. VAT)	Price Difference	Variance (%)
20/20	R 799	R 849	R 50	6.3%
10/5	N/A	R 629	N/A	N/A
20/2		R 829		
50/5		R 969		
100/10		R 1 079		
200/20		R 1 279		
100/100		R 1 799		

Source: ICASA Database based on Tariff Notifications

Table 59 above shows that 20/20Mbps package which was pre-existing prior to the amendment realised a tariff increase of R 50 or 6.3% from R 799 to R 849.

MWEB introduced the Evotel FTTH in the market on 08 December 2020.

#### 2.8.2.25. MWEB on TT Connect FTTH

MWEB filed its 3<sup>rd</sup> party FTTH on TT Connect with the Authority on 15 December 2020. The plan offers symmetrical uncapped packages ranging from 10Mbps to 1000Mbps. Table 60 below shows the fibre packages.

Table 60: MWEB on TT Connect FTTH

Line Speed (Mbps)	Price (Incl. VAT)
10/10	R 589
20/20	R 749
50/50	R 849
100/100	R 999
200/200	R 1 299
300/300	R 1 499
500/500	R 1 699
1000/1000	R 2 099

Source: ICASA Database based on Tariff Notifications

MWEB on TT Connect FTTH can be compared to TT Connect's FTTH offers, wherein for example, TT Connect charges R 1 399 for its 200Mbps uncapped package, as analysed in the 2020/21 FY Q2 Bi-Annual Tariff Analysis Report<sup>69</sup>, while MWEB on the other hand offers the 200Mbps line speed for R 1 299, which is R 100 less.

<sup>69</sup> Page 77, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020> > Accessed 23 February 2021.



MWEB introduced the MWEB on TT Connect FTTH in the market on 01 January 2020.

### 2.8.2.26. MWEB on Lightstruck FTTH

MWEB filed its Lightstruck FTTH amendment with the Authority on 15 December 2020, wherein it increased the prices of the 20/20Mbps and 50/50Mbps due to an increase in the wholesale tariffs. Table 61 below details the price changes on the Lightstruck fibre packages.

Table 61: MWEB on Lightstruck FTTH

Line Speed (Mbps)	Previous Price	Current Price	Price Difference	Price Difference (%)
20/20	R 649	R 679	R 30	4.6%
50/50	R 879	R 899	R 20	2.3%

Source: ICASA Database based on Tariff Notifications

Table 61 above shows that the 20/20Mbps line speed had R 30 or 4.6% increase from R 649 to R 679, while the 50/50Mbps line speed had a lower tariff increase of R 20 (or 2.4%) from R 879 to R 899.

The amendment to the prices came to effect on 01 January 2021 for new customers and on 01 February 2021 for existing customers.

## 3. Conclusion

The Authority observed competitiveness between licensees in terms of the number of promotions that were offered in the market, during the period under review, with 76 new promotions launched and 37 extensions filed. The introduction of new, extensions and/or amendments of previous promotions indicates that customers react positively to promotions and it is therefore a strategic tool by licensees to incentivise, reward (loyal customers) and attract new customers.

Based on the tariff notifications received in the period under review, 52 out of 283 notifications filed were related to promotional prepaid data bundles, which shows that there are efforts by operators to reduce costs to communicate whilst making

access to Internet and other data related services possible for customers. The shift of the market towards data services, or the increase in the demand thereof, is also explained by the total number of notifications relating to prepaid data services which is 80, while the total number of notifications relating to prepaid voice services is 11.

Cell C filed a number of promotions wherein it offers customers discounted voice minutes and/or data bundles. Cell C's promotional offers include (but not limited to) Cell C 7-Day WhatsApp Booster Promotion, All-In-One Double Social Bundle Promotion, NBO Data Bundles Promotion and On Us Longer Duration Bundles Promotion. Similar to Cell C, Telkom Mobile introduced the Mobile Summer of Monate Promotion offering customers discounted voice minutes and data bundles, and Vodacom introduced the 30 Day Recurring Promotional Bundles where it rewards customers with free additional data upon purchasing the 30-day standard data bundle.

In the period under review, Telkom Mobile revised its 30-day All-Network Data Portfolio in the period under review, offering more data value while the prices declined. For example, the Telkom Mobile 100MB bundle priced at R 29.60 was replaced by a 150MB (includes an additional 150MB night surfer bundle) priced at R 29. Telkom's 1GB previously priced at R 100 also had a R 1 price reduction to R 99 and it is now inclusive of an additional 1GB night surfer bundle, which gives customers more value for money.

The Authority also observed an increase in the number of MTN's Personalised offers. The operator continues to offer bundles (either voice or data) to customers in accordance to their spending profiles. In the period under review MTN filed the Personalised Everyday Gigs Regional offers, Personalised Data Bundles, Personalised Everyday Gigs Offers, Personalised Long-Term Social Bundles and Personalised Prepaid Integrated Bundles.

Cell C's MVNO, FNB Connect, introduced its new daily and weekly data bundles, which is relatively competitive and more affordable when compared with similar bundles offered by the four MNOs. For example, Vodacom and Cell C's weekly 1GB are priced at R 80 and R 65, respectively, while FNB Connect offers the same

volume for R 53, respectively saving customers R 27 (or 33.8%) and R 12 (or 18.5%).

The Authority is of the view that introduction of voice bundles is the operators' strategies to encourage customers to make voice calls at reduced effective rates. In the period under review MTN introduced the Sunrise Bundle, All-Net and On-Net Voice Bundles and Comfort Zone. The MTN Sunrise Bundle offers prepaid customers 60 on-net voice minutes to use between the 00h00 and 06h59 for a price of R 1. MTN's Comfort Zone gives MTN Zone subscribers the ability to access guaranteed discounted fixed call rates in exchange for a subscription fee. Vodacom made its All-net Bundles permanent in the market.

The Authority observed that operators continue to be innovative and offer communication services at lowered or more affordable prices that encourage virtual learning and working from home which is one critical measure that would aid in the fight against the COVID-19 pandemic. For instance, in the period under review, MTN introduced its University and TVET Bundle for NSFAS Student offer and the Unisa Students Offer in an aim to aid with the continuation of studying during the COVID-19 pandemic period.

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

#### 4. References

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

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Kholoud Dorgham, M. S, 2015. ResearchGate. [Online] Available at: [https://www.researchgate.net/publication/277669260\\_A\\_Novel\\_Dynamic\\_Pricing\\_Model\\_for\\_the\\_Telecommunications\\_Industry](https://www.researchgate.net/publication/277669260_A_Novel_Dynamic_Pricing_Model_for_the_Telecommunications_Industry) [Accessed 17 July 2019].

## Annexure A: List of Other<sup>70</sup> Tariff Notifications Filed During the Period Under Review

TARIFF PLAN	EXPLANATION OF THE TARIFF PLAN	RELEVANT DATES	PRICING/PRODUCT/PACKAGE INFORMATION	STATUS
MTN Prepaid Inflow Promotions (i.e. MTN Regional Inflow Promotion and MTN Pep and BRC Inflow Promotion)	These promotions offer integrated bundles available to customers for a given period to unlock with qualifying spending.	Filed: 22 October 2019 and 05 December 2019.  Amendment Date(s): 07 July 2020	More details regarding MTN's Inflow promotional offers can be found on the 2019/20 FY Q4 Bi-Annual Tariff Analysis Report <sup>71</sup> . Initially when the promotional offer was introduced there was a requirement that the first recharge must be performed within 90 days to qualify to participate in the promotion, however this has been amended and the promotional benefits have been made available to consumers regardless of having performed a recharge, provided that they are still active on the network and remain on the Bundle Bonanza price plan. MTN's amendment came to effect on 09 July 2020.	Ongoing as at 31 December 2020.
Cell C On Us Discount Data Bundles Promotion	Cell C's On Us Discount Data Bundles were offered to prepaid customers, with bundles discounted from 20 - 80%.	Filed: 24 January 2020  Launch Date: 05 February 2020  Extension Date: 20 July	Cell C's On Us Discount Data Bundles was analysed in the 2020/21 FY Q2 Bi-Annual Tariff Analysis Report which can be found on the Authority's website on the link below:  < <a href="https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020">https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020</a> >	Ongoing as at 31 December 2020 and was expected to be decommissioned on 31 January 2021, however this was extended to 30 June 2021.

<sup>70</sup> Other tariff notifications filed or received during the period under review that were in existence as at end of 31 December 2020 which were not discussed/mentioned in the main part of this report

<sup>71</sup> Page 47-48, available on ICASA's website: < <https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jul-29-dec-2019> > Accessed 23 February 2021.

		2020, 17 November 2020  Decommission Date: 30 June 2021														
MTN PAYG Work From Home Promotion	MTN's PAYG Work From Home Promotion was made available to new prepaid subscribers who purchased an eligible mobile broadband device.	Filed: 20 March 2020  Launch Date: 01 April 2020  Amendment Date(s): 30 July 2020, 28 September 2020, 28 October 2020  Decommission Date: 28 February 2021	Customers received once-off 13 GB of anytime data, a recurring 1GB data bundle (over 12 months) as well as a once-off 5GB YouTube bundle for a once-off price of R 599. On 30 July 2020 MTN increase the subscription fee by R 100 to R 699. In the 28 October 2020 amendment the price was reduced and by R 100, back to R 599.	Ongoing as at 31 December 2020, however, was decommissioned on 28 February 2021.												
Cell C All- In-One Double Social	The Cell C All-In-One Social Bundle Promotion is available to all Cell C	Filed: 04 August 2020	<p><i>Table 62: Cell C All-In-One Double Social Bundle Promotion</i></p> <table border="1"> <thead> <tr> <th>Description</th> <th>All-In-One 30MB</th> <th>All-In-One 120MB</th> <th>All-In-One 300MB</th> <th>All-In-One 1GB</th> <th>All-In-One 2.5GB</th> </tr> </thead> <tbody> <tr> <td><b>Bundle fee (Incl. VAT)</b></td> <td>R 5</td> <td>R 15</td> <td>R 35</td> <td>R 95</td> <td>R 195</td> </tr> </tbody> </table>	Description	All-In-One 30MB	All-In-One 120MB	All-In-One 300MB	All-In-One 1GB	All-In-One 2.5GB	<b>Bundle fee (Incl. VAT)</b>	R 5	R 15	R 35	R 95	R 195	Ongoing as at 31 December 2020 and was expected to be
Description	All-In-One 30MB	All-In-One 120MB	All-In-One 300MB	All-In-One 1GB	All-In-One 2.5GB											
<b>Bundle fee (Incl. VAT)</b>	R 5	R 15	R 35	R 95	R 195											

Bundle Promotion	prepaid and Top Up customers who purchase a qualifying All-In-One bundle. The All-In-One Social Bundle Promotion was amended in the review period, where on the 1GB and 2.5GB tiers YouTube was replaced with Facebook in terms of bonus data.	Launch Date: 12 August 2020  Amendment Date: 10 September 2020, 12 October 2020  Extension Date: 16 October 2020  Decommission Date: 28 February 2021	<b>Validity period (Days)</b>	1	14	30	30	30	decommissioned on 31 January 2021, however this was extended to 28 February 2021.
			<b>Data Bonus data applicable to On-net Minutes On-net Minutes FUP Any-net Minutes</b>	<b>Inclusive Value:</b>					
				30MB	120MB	300MB	1GB	2.5GB	
				30MB	120MB	300MB	1GB	2.5GB	
				Facebook	Facebook	Facebook	Facebook	Facebook	
				30	300	600	Unlimited	Unlimited	
n/a	n/a	n/a	900	900					
5	10	20	45	60					
<i>Source: ICASA database based on Tariff Notifications</i>									
MTN Access 4 Life Price Review	The MTN Access4Life Extender is a value-added service available to prepaid customers who anticipate a period of inactivity (beyond 90 days) that enables them to retain their	Filed: 26 August 2020  Effective Date: 30 August 2020	MTN amended the subscription from R 20 to R 5. This subscription is deducted from the consumer's airtime wallet every 90 days, provided there are enough funds.						Ongoing as at 31 December 2020.

	number during that period.																																																													
Cell C NBO Data Bundles Promotion	Cell C's NBO Data Bundles Promotion offered customers promotional open data, URL-specific data and voice minutes. The promotion was available to selected prepaid and top-up customers only, across all tariff plans depending on the customer's data usage and general spend, which selection shall be in the sole discretion of Cell C.	<p>Filed: 09 September 2020</p> <p>Launch Date: 10 September 2020</p> <p>Amendment Date: 11 November 2020, 26 November 2020, 17 December 2020</p> <p>Extension Date: 12 February 2021</p> <p>Decommission Date: 31 August 2021 (extended)</p>	<p><i>Table 63: Cell C Next Best Offer (NBO) Data Bundles Promotion (Sample)</i></p> <table border="1"> <thead> <tr> <th>Size</th> <th>Price</th> <th>Validity period</th> <th>Time of Day</th> </tr> </thead> <tbody> <tr> <td>2048MB</td> <td>R 25</td> <td>24 Hours</td> <td>Any time</td> </tr> <tr> <td>5120MB</td> <td>R 50</td> <td>48 Hours</td> <td>Any time</td> </tr> <tr> <td>2048MB</td> <td>R 30</td> <td>24 Hours</td> <td>Any time</td> </tr> <tr> <td>5120MB</td> <td>R 60</td> <td>48 Hours</td> <td>Any time</td> </tr> <tr> <td>2048MB</td> <td>R 35</td> <td>24 Hours</td> <td>Any time</td> </tr> <tr> <td>5120MB</td> <td>R 70</td> <td>48 Hours</td> <td>Any time</td> </tr> </tbody> </table> <p><i>Source: ICASA database based on Tariff Notifications</i></p> <p><i>Table 64: Next Best Offer (NBO) Tik Tok Data Bundles Promotion</i></p> <table border="1"> <thead> <tr> <th colspan="5">TikTok Bundles</th> </tr> <tr> <th>Size</th> <th>Price</th> <th>Rate/MB</th> <th>Validity period</th> <th>Time of Day</th> </tr> </thead> <tbody> <tr> <td>50MB</td> <td>R 2.50</td> <td>R 0.05</td> <td>1 day</td> <td>Any time</td> </tr> <tr> <td>100MB</td> <td>R 4.50</td> <td>R 0.045</td> <td>1 day</td> <td>Any time</td> </tr> <tr> <td>250MB</td> <td>R 7.50</td> <td>R 0.03</td> <td>1 day</td> <td>Any time</td> </tr> <tr> <td>500MB</td> <td>R 15.00</td> <td>R 0.03</td> <td>1 day</td> <td>Any time</td> </tr> </tbody> </table> <p><i>Source: ICASA database based on Tariff Notifications</i></p>	Size	Price	Validity period	Time of Day	2048MB	R 25	24 Hours	Any time	5120MB	R 50	48 Hours	Any time	2048MB	R 30	24 Hours	Any time	5120MB	R 60	48 Hours	Any time	2048MB	R 35	24 Hours	Any time	5120MB	R 70	48 Hours	Any time	TikTok Bundles					Size	Price	Rate/MB	Validity period	Time of Day	50MB	R 2.50	R 0.05	1 day	Any time	100MB	R 4.50	R 0.045	1 day	Any time	250MB	R 7.50	R 0.03	1 day	Any time	500MB	R 15.00	R 0.03	1 day	Any time	Ongoing as at 31 December 2020 and was expected to be decommissioned on 28 February 2021, however this was extended to 31 August 2021.
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Cell C 50GB for 6 Months Promotion	The operator is offering selected prepaid, post-paid and top-up customers 50GB valid for 6 months (180 days) for a monetary value of R 500.	<p>Filed: 07 February 2020</p> <p>Launch Date: 19 February 2020</p> <p>Amendment Date: 15 April 2020</p> <p>Extension Date: 18 June 2020, 11 September 2020;</p> <p>Decommission Date: 31 March 2021</p>	<p><i>Table 65: Cell C 50GB for 6 Months Promotional Bundle</i></p> <table border="1" data-bbox="790 248 1720 320"> <thead> <tr> <th>Bundle</th> <th>Validity</th> <th>Price</th> </tr> </thead> <tbody> <tr> <td>50GB</td> <td>180 days</td> <td>R 500</td> </tr> </tbody> </table> <p><i>Source: ICASA Database based on Tariff Notifications</i></p>	Bundle	Validity	Price	50GB	180 days	R 500	Ongoing as at 31 December 2020 and was expected to be decommissioned on 31 January 2021, however this was extended to 31 March 2021.									
Bundle	Validity	Price																	
50GB	180 days	R 500																	
Cell C WhatsApp Boost Promotion	The Cell C WhatsApp Boost promotion was available to customers who purchase base (standard) daily, 5-	<p>Filed: 07 November 2019</p> <p>Launch Date: 19 November 2019</p>	<p><i>Table 66: Cell C WhatsApp Boost Bundles</i></p> <table border="1" data-bbox="790 1131 1720 1377"> <thead> <tr> <th colspan="2">Base Bundle Daily Bundle</th> <th colspan="3">WhatsApp Boost Daily Bundle</th> </tr> <tr> <th>Data Allocation</th> <th>Price</th> <th>Data Allocation</th> <th>Price</th> <th>WhatsApp Boost daily Effective Rate (R/MB)</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Base Bundle Daily Bundle		WhatsApp Boost Daily Bundle			Data Allocation	Price	Data Allocation	Price	WhatsApp Boost daily Effective Rate (R/MB)						Ongoing as at 31 December 2020 and was expected to be decommissioned on 28 February 2021, however this
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	day or monthly data bundles.	Amendment: 24 June 2020  Extension Date(s): 17 January 2020, 13 March 2020, 18 June 2020, 11 September 2020, 22 October 2020, 26 November 2020, 23 February 2021  Decommission Date: 30 June 2021	<table border="1"> <tr> <td>5MB</td><td>R 2</td><td>5MB</td><td>R 1</td><td>R 0.20</td></tr> <tr> <td>25MB</td><td>R 4</td><td>25MB</td><td>R 2</td><td>R 0.08</td></tr> <tr> <td>65MB</td><td>R 9</td><td>65MB</td><td>R4.50</td><td>R 0.07</td></tr> <tr> <td>120MB</td><td>R 14</td><td>120MB</td><td>R 7</td><td>R 0.06</td></tr> <tr> <td>500MB</td><td>R 17</td><td>250MB</td><td>R 10</td><td>R 0.04</td></tr> <tr> <td>1024MB</td><td>R 20</td><td>250MB</td><td>R 10</td><td>R 0.04</td></tr> <tr> <td colspan="5" style="text-align: center;"><b>30-day Bundles</b></td></tr> <tr> <td colspan="2"><b>Base Bundle 30-day Bundle</b></td><td colspan="3"><b>WhatsApp Boost 30-day Bundle</b></td></tr> <tr> <td>40MB</td><td>R 10</td><td>40MB</td><td>R 4</td><td>R 0.10</td></tr> <tr> <td>80MB</td><td>R 15</td><td>80MB</td><td>R 5</td><td>R 0.06</td></tr> <tr> <td>150MB</td><td>R 29</td><td>150MB</td><td>R 8</td><td>R 0.05</td></tr> <tr> <td>250MB</td><td>R 35</td><td>250MB</td><td>R 12</td><td>R 0.05</td></tr> <tr> <td>325MB</td><td>R 49</td><td>325MB</td><td>R 20</td><td>R 0.06</td></tr> <tr> <td>800MB</td><td>R 80</td><td>800MB</td><td>R 25</td><td>R 0.03</td></tr> <tr> <td>1024MB</td><td>R 95</td><td>800MB</td><td>R 25</td><td>R 0.03</td></tr> <tr> <td>1536MB</td><td>R 149</td><td>800MB</td><td>R 25</td><td>R 0.03</td></tr> <tr> <td>2048MB</td><td>R 199</td><td>800MB</td><td>R 25</td><td>R 0.03</td></tr> <tr> <td>3072MB</td><td>R 249</td><td>800MB</td><td>R 25</td><td>R 0.03</td></tr> <tr> <td>6144MB</td><td>R 299</td><td>800MB</td><td>R 25</td><td>R 0.03</td></tr> <tr> <td>7168MB</td><td>R 399</td><td>800MB</td><td>R 25</td><td>R 0.03</td></tr> </table> <p>Source: ICASA Database based on Tariff Notifications</p>	5MB	R 2	5MB	R 1	R 0.20	25MB	R 4	25MB	R 2	R 0.08	65MB	R 9	65MB	R4.50	R 0.07	120MB	R 14	120MB	R 7	R 0.06	500MB	R 17	250MB	R 10	R 0.04	1024MB	R 20	250MB	R 10	R 0.04	<b>30-day Bundles</b>					<b>Base Bundle 30-day Bundle</b>		<b>WhatsApp Boost 30-day Bundle</b>			40MB	R 10	40MB	R 4	R 0.10	80MB	R 15	80MB	R 5	R 0.06	150MB	R 29	150MB	R 8	R 0.05	250MB	R 35	250MB	R 12	R 0.05	325MB	R 49	325MB	R 20	R 0.06	800MB	R 80	800MB	R 25	R 0.03	1024MB	R 95	800MB	R 25	R 0.03	1536MB	R 149	800MB	R 25	R 0.03	2048MB	R 199	800MB	R 25	R 0.03	3072MB	R 249	800MB	R 25	R 0.03	6144MB	R 299	800MB	R 25	R 0.03	7168MB	R 399	800MB	R 25	R 0.03	was extended to 30 June 2021.
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Telkom Mobile Summer of Monate Promotion	The promotion offered customers discounted voice minutes, data and social bundles during its promotional	Filed: 14 September 2020	<p>Table 67: Telkom Mobile Summer of Monate Promotion (Prepaid)</p> <table border="1"> <thead> <tr> <th>Prepaid</th><th>Bundle Size</th><th>Price</th><th>Validity</th></tr> </thead> <tbody> <tr> <td>Weekly All-network Voice bundle</td><td>10 minutes</td><td>R 5</td><td>7 days</td></tr> <tr> <td>Weekly All-network Voice bundle</td><td>20 minutes</td><td>R 9</td><td>7 days</td></tr> <tr> <td>Daily Data Social bundle</td><td>100MB</td><td>R 5</td><td>24 hours</td></tr> <tr> <td>Daily Data bundle</td><td>300MB</td><td>R 10.50</td><td>24 hours</td></tr> </tbody> </table>	Prepaid	Bundle Size	Price	Validity	Weekly All-network Voice bundle	10 minutes	R 5	7 days	Weekly All-network Voice bundle	20 minutes	R 9	7 days	Daily Data Social bundle	100MB	R 5	24 hours	Daily Data bundle	300MB	R 10.50	24 hours	Ongoing as at 31 December 2020, however it was expected to be decommissioned on 19 January 2021,																																																																																
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<p>Vodacom 30 Day Recurring Promotional Bundles</p>	<p>Vodacom 30 Day Recurring Promotional Bundles rewards customers with additional data upon purchasing selected Vodacom 30-day data bundles.</p>	<p>Filed: 23 June 2020</p> <p>Launch Date: 24 June 2020</p> <p>Extension Date: 16 September 2020</p> <p>Decommission Date: 31 March 2021</p>	<p>Table 68: Vodacom 30 Day Recurring Promotional Bundles</p> <table border="1"> <thead> <tr> <th colspan="2">Bundle Sizes</th> <th colspan="2">Price (Incl. VAT)</th> </tr> </thead> <tbody> <tr> <td colspan="2">150MB + 30MB</td> <td colspan="2">R 29</td> </tr> <tr> <td colspan="2">325MB + 65MB</td> <td colspan="2">R 55</td> </tr> <tr> <td colspan="2">500MB + 100MB</td> <td colspan="2">R 79</td> </tr> <tr> <td colspan="2">1GB + 200MB</td> <td colspan="2">R 99</td> </tr> <tr> <td colspan="2">3GB + 600MB</td> <td colspan="2">R 229</td> </tr> <tr> <td colspan="2">5GB + 1GB</td> <td colspan="2">R 349</td> </tr> <tr> <td colspan="2">10GB + 2GB</td> <td colspan="2">R 469</td> </tr> <tr> <td colspan="2">20GB + 4GB</td> <td colspan="2">R 699</td> </tr> </tbody> </table> <p>Source: ICASA database based on Tariff Notifications</p>	Bundle Sizes		Price (Incl. VAT)		150MB + 30MB		R 29		325MB + 65MB		R 55		500MB + 100MB		R 79		1GB + 200MB		R 99		3GB + 600MB		R 229		5GB + 1GB		R 349		10GB + 2GB		R 469		20GB + 4GB		R 699		<p>Ongoing as at 31 December 2020, however it will be decommissioned on 31 March 2021.</p>
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<p>Cell C On Us Longer Duration Bundles Promotions</p>	<p>Cell C's On Us Longer Duration Bundles Promotions offers prepaid customers discounted open</p>	<p>Filed: 18 September 2020</p>	<p>Table 69: Cell C On Us Longer Duration Bundles *</p> <table border="1"> <thead> <tr> <th rowspan="2">On Us Data Bundle</th> <th rowspan="2">Validity (Days)</th> <th colspan="5">Discounted Price</th> </tr> <tr> <th>10%</th> <th>20%</th> <th>30%</th> <th>40%</th> <th>50%</th> </tr> </thead> <tbody> <tr> <td>On Us Data</td> <td>30</td> <td>R 22.50</td> <td>R 20</td> <td>R 17.50</td> <td>R 15</td> <td>R 12.50</td> </tr> </tbody> </table>	On Us Data Bundle	Validity (Days)	Discounted Price					10%	20%	30%	40%	50%	On Us Data	30	R 22.50	R 20	R 17.50	R 15	R 12.50	<p>Ongoing as at 31 December 2020 and was expected to be decommissioned on</p>																	
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		Extension Date: 17 November 2020, 19 January 2021  Decommission Date: 30 June 2021	<table border="1"> <tr> <td>1.2GB Daily On Us Discount Data Bundle</td> <td>1 day</td> <td>R 40</td> <td>R 32</td> <td>R 24</td> <td>R 16</td> <td>R 8</td> </tr> </table> <p>Source: ICASA database based on Tariff Notifications</p>	1.2GB Daily On Us Discount Data Bundle	1 day	R 40	R 32	R 24	R 16	R 8										
1.2GB Daily On Us Discount Data Bundle	1 day	R 40	R 32	R 24	R 16	R 8														
MTN Summer 2020 Promotion #Remake20 20	MTN's Summer 2020 Promotion enabled eligible prepaid and post-paid customers who are registered on the MTN's Loyalty Program to earn loyalty points which unlocked the benefits of MTN's Summer Promotion.	Filed: 29 September 2020  Launch Date: 01 October 2020  Decommission Date: 31 January 2021	<p>Table 71: MTN Loyalty Points (Sample)</p> <table border="1"> <thead> <tr> <th>Activity</th> <th>No. of Loyalty Points</th> </tr> </thead> <tbody> <tr> <td>Purchase bundles, including via MOMO Purchases</td> <td>R 1 spend earns 1 Point</td> </tr> <tr> <td>Purchases bundles via My MTN Offers</td> <td>For every R 1 you get 2 loyalty points</td> </tr> <tr> <td>Upgrade you contract</td> <td>2000</td> </tr> <tr> <td>Perform an upward migration on your Post-paid price plan</td> <td>2000</td> </tr> <tr> <td>Active Day</td> <td>For every 1 day that you are active on the network you get 1 point</td> </tr> <tr> <td>Pay your monthly subscription</td> <td>R1.00 spend for 1 point</td> </tr> <tr> <td>Provide your email address to MTN</td> <td>100</td> </tr> </tbody> </table> <p>Source: ICASA database based on Tariff Notifications</p> <p>It should be noted that loyalty points can be redeemed on the Loyalty catalogue, which is included in the Loyalty T&amp;Cs as well as on the MTN App and on MTN's website (<a href="http://www.mtn.co.za">www.mtn.co.za</a>).</p>	Activity	No. of Loyalty Points	Purchase bundles, including via MOMO Purchases	R 1 spend earns 1 Point	Purchases bundles via My MTN Offers	For every R 1 you get 2 loyalty points	Upgrade you contract	2000	Perform an upward migration on your Post-paid price plan	2000	Active Day	For every 1 day that you are active on the network you get 1 point	Pay your monthly subscription	R1.00 spend for 1 point	Provide your email address to MTN	100	Ongoing as at 31 December 2020, however it was decommissioned on 31 January 2021.
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Provide your email address to MTN	100																			

<p>Cell C Recharge Drop Promotion</p>	<p>The promotional offer is such that Cell C rewards its selected customers with either free data or voice a bundle after the specified airtime recharges.</p>	<p>Filed: 12 May 2020          Launch Date: 14 May 2020          Extension Date: 30 September 2020, 19 January 2021          Decommission Date: 31 July 2021</p>	<p>Cell C's Recharge Drop Promotion was analysed in the 2020/21 FY Q2 Bi-Annual Tariff Analysis Report which can be found on the Authority's website on the link below:  <a href="https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020">https://www.icasa.org.za/legislation-and-regulations/retail-tariffs-report-01-jan-30-jun-2020</a> &gt;</p>	<p>Ongoing as at 31 December 2020.          Initially it was expected to be decommissioned on 31 January 2021, however it's been extended to 31 July 2021.</p>																																
<p>Cell C Recharge and Get Promotion</p>	<p>Cell C's Recharge and Get rewarded selected Cell C subscribers with free data bundles with every qualifying recharge.</p>	<p>Filed: 24 March 2020          Launch Date: 03 April 2020          Amendment Date: 01 October 2020          Extension Date: 01</p>	<p><i>Table 72: Cell C Recharge and Get Promotion Tiers</i></p> <table border="1" data-bbox="786 906 1720 1273"> <thead> <tr> <th>Recharge AMT required for reward allocation</th> <th>Reward (Data)</th> <th>Reward (Voice Minutes)</th> <th>Validity (Days)</th> </tr> </thead> <tbody> <tr> <td>R10</td> <td>20MB</td> <td>2</td> <td>2</td> </tr> <tr> <td>R15</td> <td>40MB</td> <td>5</td> <td>2</td> </tr> <tr> <td>R20</td> <td>70MB</td> <td>15</td> <td>2</td> </tr> <tr> <td>R25</td> <td>100MB</td> <td>20</td> <td>2</td> </tr> <tr> <td>R30</td> <td>100MB</td> <td>20</td> <td>2</td> </tr> <tr> <td>R35</td> <td>120MB</td> <td>20</td> <td>2</td> </tr> <tr> <td>R50</td> <td>120MB</td> <td>20</td> <td>2</td> </tr> </tbody> </table> <p><i>Source: ICASA Database based on Tariff Notifications</i></p>	Recharge AMT required for reward allocation	Reward (Data)	Reward (Voice Minutes)	Validity (Days)	R10	20MB	2	2	R15	40MB	5	2	R20	70MB	15	2	R25	100MB	20	2	R30	100MB	20	2	R35	120MB	20	2	R50	120MB	20	2	<p>Ongoing as at 31 December 2020.          Initially it was expected to be decommissioned on 31 January 2021, however this has been extended to 31 July 2021.</p>
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		October 2020, 19 January 2021  Decommission Date: 31 July 2021																																						
Cell C Data Winback Retentions Promotion	Cell C's Data Winback Promotion is such that Cell C rewards its selected customers with either free 10 voice minutes, 5 voice minutes, or a 20MB data bundle after the specified airtime recharges.	Filed: 14 May 2020  Launch Date: 15 May 2020  Extension Date: 17 November 2020, 19 January 2021  Decommission Date: 31 July 2021	<p><i>Table 73: Cell C Winback Retentions Promotional Offer</i></p> <table border="1"> <thead> <tr> <th>Recharge Amount</th> <th>Reward prepaid customers inactive &gt; 30 Days</th> <th>Reward for data users and inactive &lt; 31 Days</th> <th>non-data users and Inactive &lt; 31 Days</th> </tr> </thead> <tbody> <tr> <td colspan="4"><b>Voice On-Net Minute Rewards based on required recharge amount</b></td> </tr> <tr> <td>R 5 recharge</td> <td rowspan="14">10 On-net Minutes</td> <td rowspan="14">20MB</td> <td rowspan="14">5 On-net Minutes</td> </tr> <tr><td>R 10 recharge</td></tr> <tr><td>R 20 recharge</td></tr> <tr><td>R 25 recharge</td></tr> <tr><td>R 30 recharge</td></tr> <tr><td>R 35 recharge</td></tr> <tr><td>R 50 recharge</td></tr> <tr><td>R 60 recharge</td></tr> <tr><td>R 70 recharge</td></tr> <tr><td>R 100 recharge</td></tr> <tr><td>R 120 recharge</td></tr> <tr><td>R 150 recharge</td></tr> <tr><td>R 200 recharge</td></tr> <tr><td>R 300 recharge</td></tr> <tr><td>R 500 recharge</td></tr> <tr> <td colspan="4"><b>Voice On-Net Minute Reward based on an All-In-One Bundle amount</b></td> </tr> <tr> <td>R 5 (30MB All-In One Bundle)</td> <td rowspan="2">10 On-net Minutes</td> <td rowspan="2">20MB</td> <td rowspan="2">5 On-net Minutes</td> </tr> <tr> <td>R 15 (120MB All-In One Bundle)</td> </tr> </tbody> </table>		Recharge Amount	Reward prepaid customers inactive > 30 Days	Reward for data users and inactive < 31 Days	non-data users and Inactive < 31 Days	<b>Voice On-Net Minute Rewards based on required recharge amount</b>				R 5 recharge	10 On-net Minutes	20MB	5 On-net Minutes	R 10 recharge	R 20 recharge	R 25 recharge	R 30 recharge	R 35 recharge	R 50 recharge	R 60 recharge	R 70 recharge	R 100 recharge	R 120 recharge	R 150 recharge	R 200 recharge	R 300 recharge	R 500 recharge	<b>Voice On-Net Minute Reward based on an All-In-One Bundle amount</b>				R 5 (30MB All-In One Bundle)	10 On-net Minutes	20MB	5 On-net Minutes	R 15 (120MB All-In One Bundle)	Ongoing as at 31 December 2020.  Initially it was expected to be decommissioned on 31 January 2021 however this has been extended to 31 July 2021.
Recharge Amount	Reward prepaid customers inactive > 30 Days	Reward for data users and inactive < 31 Days	non-data users and Inactive < 31 Days																																					
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			R 35 (300MB All-In One Bundle) R 95 (1GB All-In One Bundle) R 195 (2.5GB All-In One Bundle)												
<i>Source: ICASA database based on Tariff Notifications</i>															
MTN MoMo Black Friday Daily 1GB Promotion	MTN's MoMo Black Friday promotion was made exclusive to MTN Mobile Money (MoMo) customers. Eligible customers received a discount on the hourly 1GB data bundle.	Filed: 18 November 2020  Launch Date: 20 November 2020  Extension Date(s): 08 December 2020, 14 December 2020  Decommission Date: 31 January 2021	<b>Table 74: MTN MoMo Black Friday 1GB Promotional Data Bundle</b> <table border="1"> <thead> <tr> <th>MoMo Data Bundle Offer</th> <th>Validity</th> <th>Retail Price (Incl. VAT)</th> <th>Black Friday Price (Incl. VAT)</th> </tr> </thead> <tbody> <tr> <td>MoMo 1GB bundle</td> <td>1 Hour</td> <td>R 30</td> <td>R 1</td> </tr> </tbody> </table>				MoMo Data Bundle Offer	Validity	Retail Price (Incl. VAT)	Black Friday Price (Incl. VAT)	MoMo 1GB bundle	1 Hour	R 30	R 1	Ongoing as at 31 December 2020, however it was decommissioned on 31 January 2021.
MoMo Data Bundle Offer	Validity	Retail Price (Incl. VAT)	Black Friday Price (Incl. VAT)												
MoMo 1GB bundle	1 Hour	R 30	R 1												
<i>Source: ICASA database based on Tariff Notifications</i>															



<p>Cell C 50GB for 6 Months Black Friday Promotion</p>	<p>Cell C is offering selected prepaid, post-paid and top-up customers 50GB + 50GB Nite Data valid for 6 months (180 days) for a monetary value of R 500.</p>	<p>Filed: 23 November 2020</p> <p>Launch Date: 27 November 2020</p> <p>Extension Date: 04 December 2020</p> <p>Decommission Date: 31 January 2020</p>	<p><i>Table 75: Cell C 50GB for 6 Months Black Friday Promotional Bundle</i></p> <table border="1" data-bbox="786 248 1720 336"> <thead> <tr> <th>Anytime allocation</th> <th>Data Free Nite Data Allocation</th> <th>Validity</th> <th>Price</th> </tr> </thead> <tbody> <tr> <td>50GB</td> <td>50GB</td> <td>180 days</td> <td>R 500</td> </tr> </tbody> </table> <p><i>Source: ICASA database based on Tariff Notifications</i></p>	Anytime allocation	Data Free Nite Data Allocation	Validity	Price	50GB	50GB	180 days	R 500	<p>Ongoing as at 31 December 2020, however it was decommissioned on 31 January 2021.</p>
Anytime allocation	Data Free Nite Data Allocation	Validity	Price									
50GB	50GB	180 days	R 500									
<p>MTN Supersonic While You Wait F-LTE Promotion</p>	<p>MTN Supersonic While You Wait F-LTE Promotion is a value-added service for customers signing up for a FTTH plan.</p>	<p>Filed: 27 November 2020</p> <p>Launch Date: 01 December 2020</p> <p>Decommission Date: None (plan has</p>	<p>Customers were issued an F-LTE router and SIM in order to enjoy internet connectivity while waiting for the FTTH installation processes to run its course. The consumer enjoyed uncapped F-LTE services for free until their FTTH services were installed.</p>	<p>Ongoing as at 31 December 2020, however it was to be decommissioned on 31 January 2021, however on 08 March 2021, MTN introduced the service as a permanent offer.</p>								

		been made Standard)																										
MTN COVID ALERT App Promotion	MTN's COVID ALERT App Promotion encourages more people to download the new Bluetooth contact-tracing app for COVID-19.	Filed: 03 December 2020 Launch Date: 5 December 2020 Decommission Date: 31 March 2021	MTN is incentivising every unique download with a 1GB anytime data bundle valid for an hour from the time of allocation. After download of the COVID-19 ALERT App, the customer must redeem 1GB reward using the redeem function on the App.	Ongoing as at 31 December 2020, however it is to be decommissioned on 31 March 2021.																								
Youth Pulse Squad Voice Bundle Promotion	Youth Pulse Squad Voice Bundle Promotion rewarded customers with free promotional voice bundles that could be used to call other MTN Pulse subscribers, subject to the purchase of a qualifying bundle.	Filed: 09 December 2020 Launch Date: 11 December 2020 Decommission Date: 31 March 2021	<p><i>Table 76: MTN Youth Pulse Squad Voice Promotional Bundles</i></p> <table border="1"> <thead> <tr> <th>Pulse bundle Purchase</th> <th>Free Squad Voice Minutes Promotion</th> <th>Promo Validity Period</th> <th>Price</th> </tr> </thead> <tbody> <tr> <td>100MB (50MB Anytime+50MB Night)</td> <td>5 minutes Pulse-Pulse</td> <td>1 day</td> <td>R 5</td> </tr> <tr> <td>400MB (200MB Anytime+200MB Night)</td> <td>15 minutes Pulse-Pulse</td> <td>1 day</td> <td>R 10</td> </tr> <tr> <td>1GB Anytime+30 minutes (On-net)</td> <td>60 minutes Pulse-Pulse</td> <td>1 day</td> <td>R 19</td> </tr> <tr> <td>800MB (400MB Anytime+400MB Night) + 60 minutes (On-net)</td> <td>60 minutes Pulse-Pulse</td> <td>1 day</td> <td>R 30</td> </tr> <tr> <td>2GB (1GB Anytime+1GB Night) + 60 minutes (On-net)</td> <td>60 minutes Pulse-Pulse</td> <td>1 day</td> <td>R 79</td> </tr> </tbody> </table> <p><i>Source: ICASA database based on Tariff Notifications</i></p>	Pulse bundle Purchase	Free Squad Voice Minutes Promotion	Promo Validity Period	Price	100MB (50MB Anytime+50MB Night)	5 minutes Pulse-Pulse	1 day	R 5	400MB (200MB Anytime+200MB Night)	15 minutes Pulse-Pulse	1 day	R 10	1GB Anytime+30 minutes (On-net)	60 minutes Pulse-Pulse	1 day	R 19	800MB (400MB Anytime+400MB Night) + 60 minutes (On-net)	60 minutes Pulse-Pulse	1 day	R 30	2GB (1GB Anytime+1GB Night) + 60 minutes (On-net)	60 minutes Pulse-Pulse	1 day	R 79	Ongoing as at 31 December 2020, however it is to be decommissioned on 31 March 2021.
Pulse bundle Purchase	Free Squad Voice Minutes Promotion	Promo Validity Period	Price																									
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Francois O'Kennedy W.O.R.X Top-up Bundles	Francois O'Kennedy W.O.R.X reduced the prices of its FWorx Top-ups.	Filed: 10 December 2020 Effective Date: 01 January 2021	<p data-bbox="792 193 1422 220"><i>Table 77: Francois O'Kennedy W.O.R.X Top-up Bundles</i></p> <table border="1" data-bbox="792 248 1720 483"> <thead> <tr> <th data-bbox="792 248 1256 296">Data Volume</th> <th data-bbox="1263 248 1720 296">Price</th> </tr> </thead> <tbody> <tr> <td data-bbox="792 301 1256 328">1GB</td> <td data-bbox="1263 301 1720 328">R 15</td> </tr> <tr> <td data-bbox="792 333 1256 360">2GB</td> <td data-bbox="1263 333 1720 360">R 30</td> </tr> <tr> <td data-bbox="792 365 1256 392">5GB</td> <td data-bbox="1263 365 1720 392">R 80</td> </tr> <tr> <td data-bbox="792 397 1256 424">10GB</td> <td data-bbox="1263 397 1720 424">R 140</td> </tr> <tr> <td data-bbox="792 429 1256 456">20GB</td> <td data-bbox="1263 429 1720 456">R 215</td> </tr> <tr> <td data-bbox="792 461 1256 488">100GB</td> <td data-bbox="1263 461 1720 488">R 625</td> </tr> </tbody> </table> <p data-bbox="792 488 1361 512"><i>Source: ICASA database based on Tariff Notifications</i></p>	Data Volume	Price	1GB	R 15	2GB	R 30	5GB	R 80	10GB	R 140	20GB	R 215	100GB	R 625	Ongoing as at 31 December 2020.
Data Volume	Price																	
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## Annexure B: Promotions that Ended During the Period Under Review

TARIFF PLAN	EXPLANATION OF THE TARIFF PLAN	RELEVANT DATES
Vodacom on Vumatel FTTH Promotion	Vodacom offered residents in Polokwane discounted fibre packages on the Vumatel network.	Filed: 01 July 2020  Launch Date: 03 July 2020  Decommission Date: 31 October 2020
MTN Pulse Social Pass and Tik Tok Bundle Promotion	The promotional bundles were offered to MTN customers on the MTN Pulse price plan and comprised of Social Pass and Tik Tok bundles.	Filed: 11 June 2020  Launch Date: 16 June 2020  Extension Date(s): 07 July 2020, 16 July 2020  Decommission Date: 31 October 2020
MTN Vumatel Relief Promotion	As part of its Be Safe campaign, MTN offered a free line speed upgrade on its fibre plans between March and July 2020. Thus, the operator offered those customers who elected to remain on upgraded line speed a discount on the subscription fees for a period of up to 2 consecutive billing cycles.	Filed: 27 July 2020  Launch Date: 01 August 2020  Decommission Date: 1 September 2020
MTN Vuma Reach Relief Promotion 2.0	MTN Supersonic offered its Vuma Reach customers a free line upgrade from 20/10 Mbps to 40/10 Mbps.	Filed: 27 July 2020

		<p>Launch Date: 01 August 2020</p> <p>Decommission Date: 30 August 2020</p>
MTN MoMo Social Pass Promotion	MoMo Social Pass Promotion offered promotional Social bundles that were exclusive to MTN MoMo users.	<p>Filed: 26 March 2020</p> <p>Launch Date: 06 April 2020</p> <p>Extension Date(s): 29 June 2020, 30 July 2020</p> <p>Decommission Date: 31 October 2020</p>
MTN Cake Crush Promotion	Customers who participated in the Cake Crush competition stood a chance to either win free bundles i.e. Voice On-Net Minutes, data, social, international calling, video and music bundles; or receive offers to purchase discounted bundles and had a chance to also win retail vouchers.	<p>Filed: 15 April 2020</p> <p>Launch Date: 17 April 2020</p> <p>Extension Date: 30 July 2020</p> <p>Decommission Date: 30 September 2020</p>
HelloMobile Data Bundle Promotion	HelloMobile ran a promotion, offering mobile data bundles at discounted prices.	<p>Filed: 01 October 2019</p> <p>Launch Date: 11 October 2019</p>

		<p>Extension Date: 17 January 2020, 13 March 2020, 18 June 2020, 03 August 2020</p> <p>Decommission Date: 31 August 2020</p>
MetroFibre Buccleuch Installation Promotion	MetroFibre offered free installation of termination points to on-net customers in the Buccleuch area of Johannesburg.	<p>Filed: 12 August 2020</p> <p>Launch Date: 22 August 2020</p> <p>Decommission Date: 30 September 2020</p>
MetroFibre Termination Point Special	MetroFibre's Termination Point Special rewarded new/prospect customers with free installation of termination points when taking up the fibre-to-the-home (FTTH) plans in the in MetroFibre's existing footprint.	<p>Filed: 10 September 2020</p> <p>Launch Date: 18 September 2020</p> <p>Decommission Date: 30 November 2020</p>
Vodacom 1GB Promotional Data Bundle	Vodacom's 1GB Promotional Data Bundle was available on the Vodacom App to prepaid customers who do bank card purchases only. It offered customers a 30-day 1GB open data bundle for R 75.	<p>Filed: 14 September 2020</p> <p>Launch Date: 15 September 2020</p> <p>Decommission Date: 15 December 2020</p>
MetroFibre 5Mbps Uncapped Product	Following a decrease in demand for the 5Mbps Package MetroFibre has opted to terminate its 5Mbps uncapped product offering to new customers with effect from 01 November 2020.	<p>Filed: 17 September 2020</p>

		Decommission Date: 01 November 2020
MTN Supersonic on MetroFibre 5Mbps Package	MTN terminated the 5Mbps package on the MetroFibre network and it was no longer offered to new customers as from 01 November 2020. Existing customers were given notice and either migrated to new services or have services terminated by 31 May 2021.	Filed: 22 September 2020 Decommission Date: 01 November 2020
MTN Youth Pulse Referral Promotion	MTN Pulse referral promotion allowed existing MTN Pulse subscribers to refer their friends to join MTN Pulse. The MTN Pulse customer that referred a friend was rewarded with a 1GB MTN Pulse Social Pass bundle upon successful registration of the referred friend on the condition that the qualifying referrer was still on MTN Pulse.	Filed: 29 September 2020 Launch Date: 01 October 2020 Amendment Date: 09 December 2020 Decommission Date: 31 December 2020
FNB Connect Bundle Promotion	The promotion comprised of double data allocations for selected once-off and recurring data bundles while prices remain unchanged.	Filed: 09 April 2020, 30 September 2020 Launch Date: 10 April 2020 Decommission Date: 12 October 2020
Francois O'Kennedy W.O.R.X Promotional Top-ups	Francois O'Kennedy W.O.R.X offered customers its spare data capacity to as top-up data, offered at discounted prices.	Filed: 14 October 2020 Launch Date: 23 October 2020 Extension Date: 27 October 2020

		Decommission Date: 30 November 2020
MWEB 2 Months Free Promotion	MWEB offered a 2 months free subscription on fibre plans.	Filed: 15 October 2020  Launch Date: 19 October 2020  Decommission Date: 20 November 2020
Rain Unlimited 4G for phones and Unlimited home 5G standard	Rain's Unlimited 4G for Phones Promotion offered unlimited MtM data for R 299 per month. The Unlimited home 5G standard unlimited offered MtM data for R 479 per month.	Filed: 12 November 2020  Launch Date: 23 November 2020  Decommission Date: 16 December 2020
MTN Fixed-LTE Black Friday Promotion	Customers who signed up for the 60GB and Uncapped F-LTE services during the promotional period enjoyed reduced subscription fees of R 199 and R 999, respectively.	Filed: 13 November 2020  Launch Date: 23 November 2020  Decommission Date: 04 December 2020
MTN Prepaid Black Friday Home Wi-Fi Device Promotion	Consumers who purchased the qualifying mobile broadband devices at R 499, or a Home Wi-Fi SIM at R 199, received additional promotional data value of 50GB.	Filed: 17 November 2020  Launch Date: 19 November 2020  Decommission Date: 09 December 2020



MTN Prepaid Black Friday Personalised Offers	MTN's Prepaid Black Friday Personalised bundles offer customers discounted voice minutes, anytime data and integrated bundles.	<p>Filed: 17 November 2020</p> <p>Launch Date: 26 November 2020</p> <p>Decommission Date: 09 December 2020</p>
MTN MoMo Black Friday Promotion	MTN's Black Friday promotion was exclusive to MTN Mobile Money (MoMo) customers. Eligible customers received discounts on data bundles.	<p>Filed: 18 November 2020</p> <p>Launch Date: 20 November 2020</p> <p>Extension Date: 08 December 2020</p> <p>Decommission Date: 31 December 2020</p>
MTN App Promotion	Customers who downloaded the app (either through the Google Play Store or Apple App Store) during the promotional period, and successfully login, received a promotional allocation of 1GB data for free. The promotional data was applicable to first time users and existing customers who had not used the App in last 90 days.	<p>Filed: 02 December 2020</p> <p>Launch Date: 04 December 2020</p> <p>Decommission Date: 31 December 2020</p>
MyWiFi ISP Promotion	The promotion entailed an installation discount in outlying areas of 50%.	<p>Filed: 07 December 2020</p> <p>Launch Date: 17 December 2020</p> <p>Decommission Date: 31 December 2020</p>

Youth Snack Bundle Promotion	MTN's Youth Snack bundles promotion which saw the MTN Youth Pulse subscribers, targeted receiving free additional promotional value. The additional promotional value gave Youth Pulse subscribers access to social media for a specified duration.	Filed: 28 May 2019  Launch Date: 06 June 2019  Amendment Date: 25 June 2019  Decommission Date: 09 December 2020
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