

Independent Communications Authority of South Africa

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## The State of the ICT Sector Report of

### **South Africa**

# March 2022

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#### **EXECUTIVE SUMMARY**

The Independent Communications Authority of South Africa ("ICASA / the Authority") is pleased to release the 7<sup>th</sup> annual State of Information Communication Technology (ICT) sector report. The first publication was in 2015.

The Authority continues to recognise that the access to a comprehensive and timely set of ICT indicators is vital for a proper regulation of the sectors for which it is responsible, namely: the telecommunications, broadcasting, and postal sectors. The intention is to use these indicators to benchmark values, inform sector policy analysis and ensure compatibility with global benchmarking and data compiled by other regulators. The data used to compile this report was collected over a 12-month period ending 30 September 2021. The data was collected from secondary sources (such as Statistics South Africa ("Stats SA") and OOKLA) as well as through a detailed questionnaire sent to relevant stakeholders by the Authority. Like the previous report, this report also includes an international comparison of South African internet speeds for fixed as well as mobile broadband (both download and upload speeds).

The Authority received a total of one hundred two (102) responses from the Electronic Communications Service (ECS) and Electronic Communications Network Service (ECNS) licensees, twenty-eight (28) responses were from television and radio broadcasters and only seven (7) responses were received from postal services licensees.

According to the 2020 Stats SA's General Household Survey (GHS) report, the proportion of South Africa's households who have access to only cellular phones is at 89.4% nationally. Eastern Cape is the highest at 96.4% followed by Mpumalanga at 92.2%, and the lowest is Gauteng at 88.2% for the same period. For households who have no access to neither a cellular phone nor a landline, Limpopo is the highest at 3.2% and the lowest is Mpumalanga at 1.1% for the same period. For households who have access only to landline phones both Northern Cape and Western Cape are the highest at 1.4% for the same period.

The total sector revenue (telecommunications, broadcasting, and postal services) slightly increased by 0.3% from R243 billion in 2020 to R243.6 billion in 2021. The broadcasting services revenue increased by 2.8% from R35 billion in 2020 to R36 billion in 2021, and postal services revenue increased by 11.1% in 2021, however telecommunication revenue has slightly decreased by 0.5% from R201 billion in 2020 to R200 billion in 2021.

The total numbers for the three sectors employment decreased by 22.4% in 2021. Employment changes in the three sectors were as follows: telecommunications sector employment decreased by 35.8%, broadcasting sector employment also decreased by 18.7%, and postal sector employment increased by 2.1%.

National population coverage for 3G was at 99.9% in 2021. National population coverage for 4G/LTE was at 97.7% in 2021. 5G population coverage was at 7.5% for the same period.

The total mobile cellular phone voice subscriptions increased by 8.7% from 94 million in 2020 to 103 million in 2021. Post-paid mobile cellular telephone subscriptions for urban and rural area increased by 5.3% and 5.4%, respectively in 2021.

The total wireless-broadband subscriptions decreased by 7% (from 244,876 in 2020 to 227,840 in 2021). Satellite subscriptions significantly increased by 54.2% in 2021, and terrestrial fixed broadband subscriptions decreased by 10.3% for the same period.

According to the global Speedtest, the fixed broadband speed ranking for South Africa has dropped down from 87 in 2020 to 100 in 2021. The mobile broadband ranking also dropped from 55 in 2020 to 61 for the same period.

The total number of Pay TV subscriptions is growing, in 2015 it was just about 5.6 million and in 2021 is about 8.3 million.

The number of PO Boxes and number of PO Boxes rented remain the same from 2020 to 2021, however the number of physical addresses in the data base slightly increased by 0.2% (from 16.7 million 2020 to 16.8 million 2021.

#### **1 INTRODUCTION**

During the 2020/21 financial year, ICASA issued the temporary high-demand spectrum ("HDS") / International Mobile Telecommunications ("IMT") licences to licensees with an aim of mitigating the devastating economic impact that the COVID-19 outbreak had on the economy. The primary aim of this temporary spectrum release was to ease network congestion, ensure high quality broadband services and most importantly to enable licensees to provide their services at reduced costs. The validity of the temporary spectrum licenses was extended to 30 November 2021.

On 11 November 2021, the Authority published the ICT COVID-19 National State of Disaster Regulations, 2021, which introduced a new provisional radio frequency spectrum regime. The provisional radio frequency spectrum licenses are valid from 1 December 2021 until 30 June 2022 or until three months after the termination of the National State of Disaster, whichever occurs first.

On 10 December 2021, the Authority re-published an Invitation to Apply ("ITA") for HDS Spectrum. The Authority received six (6) applications in response to the ITA.

On the 17 March 2022, the Authority successfully concluded the much-anticipated high-demand radio frequency spectrum auction.

#### Aim

The report presents the performance and developments in the ICT sector, focusing on the three areas that are regulated by ICASA, namely: telecommunications, broadcasting, and postal services.

The report aims to provide up to date information to enable interested parties to make informed decisions on the ICT sector.

#### **ICASA Mandate**

ICASA is a creature of statute and derives its mandate from the Constitution of the Republic of South Africa, 1996, the Independent Communications Authority of South Africa, 2000 (Act No. 13 of 2000) (ICASA Act), the Broadcasting Act, 1999 (Act No. 4 of 1999), the Electronic Communications Act, 2005 (Act No. 36 of 2005), and the Postal Services Act, 1998 (Act No. 124 of 1998). The Authority regulates electronic communications, postal services, and broadcasting in the public interest.

Within this mandate, the Authority's responsibility includes the collection of information and statistics on the ICT sector to monitor, report and ensure that regulations are fact-based.

The Authority also has a responsibility to ensure that all South Africans have access to affordable services of high quality, as stipulated in the letter and spirit of the underlying statutes.

#### Methodology

In terms of section 4(3)(g) of the ICASA Act, ICASA has the mandate to request and obtain specific information and data from all licensees at any given time. The Authority makes use of questionnaires customized for ECS, ECNS, Television and Radio Broadcasters as well as Postal service licensees to solicit data on ICT indicators. The questionnaires cover data over a 12-month period ending on 30 September each year, unless otherwise specified. For confidentiality reasons, the information gathered is aggregated to conceal stakeholder-specific information.

The Authority conducts extensive data validation, data pre-processing and analysis using various statistical tools for interpretation, discovery and communication of patterns and trends within the data. The primary aim of conducting this analysis is to draw meaningful insight from the collected data for purposes of narrating the South African state of the ICT Sector.

#### Limitations

The following possible limitations to the report should be borne in mind when interpreting the information collected:

- The unreserved postal sector always had a low response rate to the questionnaire; and
- the data contained in the report is self-reported by licensees, which therefore requires a more rigorous data-validation process.

#### Structure of the report

The report is structured as follows: Section 2 presents information as collected by Stats SA. Section 3 looks at information as collected by the Authority. The information is then broken down and presented per sector: Telecommunications Sector (Section 4), Broadcasting Sector (Section 5), and Postal Services Sector (Section 6). Section 7 provides a conclusion.

#### 2 INFORMATION ON THE ICT SECTOR AS REPORTED BY STATISTICS SOUTH AFRICA

The State of the ICT sector report is published a year ahead of Stats SA's GHS on or by the 31<sup>st</sup> of March annually in accordance with ICASA's Annual Operational Performance Plan.

According to the GHS, the proportion of households who use only cellular phones as a means of communication increased by 1.6% from 87.8% in 2019 to 89.40% in 2020. Households using both cellular phones and fixed (or landlines) increased from 7.1% in 2018 to 8.3% in 2019. For the period of 5 years (from 2015 to 2019), the proportion of households using only landline phones have been stable at 0.1%, however in 2020 the proportion of households using only landline phones is at 0.5%. The proportion of households who have no access to neither a cellular nor a landline phone decreased from 3.8% in 2019 to 1.8% in 2020.

# Graph 1: Proportion of households who have a functional landline and/or cellular telephone in the Republic of South Africa for 2015 to 2020



Source: StatsSA GHS, 2015,2016,2017,2018, 2019 & 2020

According to the GHS report, the national proportion of South Africa's households who have access to only cellular phones is at 89.4% in 2020. In terms of the provinces, Eastern Cape is the highest at 96.4% followed by North West and Mpumalanga at 92.2%. Gauteng is the lowest at 88.2% for the same period. For the proportion of households who have no access to neither a cellular phone nor a landline, Limpopo is the highest at 3.2% in 2020 and Mpumalanga is the lowest at 0.5% for the same period. For the proportion of households. For the proportion of households who have no access to neither a cellular phone nor a landline, Limpopo is the highest at 3.2% in 2020 and Mpumalanga is the lowest at 0.5% for the same period.



Graph 2: Percentage of Households who have functional landline and cellular telephone in their dwellings by province for 2020

Source: StatsSA GHS, 2020

The national proportion of households who have access to Internet was at 74.1% in 2020. This high percentage is mainly because at least one member of the household had access to internet through mobile devices and laptops. At the Provincial level, Gauteng had the highest proportion of households who have access to the Internet at 85.2%, followed by the Western Cape at 80.9%. Limpopo had the lowest proportion of households who have access to the Internet at 58.4%.



Graph 3: Percentage of Households with access to the Internet at home, or for which at least one member has access to or used the Internet by province for 2020

Source: StatsSA GHS, 2020

In Table 1 below Internet access is further broken down in terms of place of access such as metropolitan, urban, or rural status at both Provincial and National levels. In 2020, the proportion of households using mobile devices to access internet at national level are as follows: metros at 66.8%, urban at 71.6%, and rural at 52.9%.

Place where	Rural/ Urban	Province (per cent)									
internet is	status	WC	EC	NC	FS	KZN	NW	GP	MP	LP	RSA
	Metro	25.1	11.3	-	13.6	3.8	-	14.0	-	-	14.0
At home	Urban	11.9	1.5	8.0	3.0	7.8	1.9	16.3	1.4	5.6	6.8
At nome	Rural	6.2	0.1	8.8	4.5	0.4	0.3	0.0	1.2	0.5	0.8
	Total	20.3	4.4	8.2	6.2	3.4	1.0	14.2	1.3	1.5	8.3
	Metro	17.0	16.8	-	17.5	31.6	-	29.1	-	-	26.1
Atwork	Urban	17.5	12.2	18.1	9.4	27.5	14.8	16.4	13.9	14.5	16.4
ALWORK	Rural	24.1	6.4	10.2	9.2	4.3	3.5	0.0	3.2	4.1	4.8
	Total	17.5	11.4	15.9	11.7	20.3	8.4	27.3	7.9	5.9	17.5
	Metro	64.2	53.7	-	52.3	59.6	-	72.1	-	-	66.8
Using	Urban	69.7	59.2	62.4	64.2	77.1	73.0	79.8	73.0	77.8	71.6
devices	Rural	55.8	47.4	64.6	44.8	50.9	48.9	58.1	65.3	52.2	52.9
uevices	Total	65.4	52.2	63.0	59.0	60.2	59.3	73.1	68.7	56.9	64.1
At Internet	Metro	16.9	16.7	-	15.0	47.1	-	28.7	-	-	28.2
Cafes or	Urban	12.8	9.1	9.0	10.2	11.4	8.8	25.8	15.9	6.1	13.1
educational	Rural	21.4	3.1	0.4	9.9	3.3	3.3	0.0	10.4	3.8	4.9
facilities	Total	15.9	9.2	6.6	11.6	22.6	5.6	28.2	12.8	4.2	17.6

Table 1: Households' access to the Internet by place of access,urban/rural status, and province, 2020

Source: StatsSA GHS, 2020

#### **3 ICT DATA COLLECTED BY ICASA**

This section reports on the aggregated data that was received by ICASA through questionnaires sent to licensees in September 2021.

#### 3.1 Revenue for the three sectors regulated by ICASA

The total sector revenue (telecommunications, broadcasting and postal) slightly increased by 0.3% from R243 billion in 2020 to R243.6 billion in 2021. The broadcasting services revenue increased by 2.8% from R35 billion in 2020 to R36 billion in 2021, and postal services revenue increased by 11.1% from R5.9 billion in 2020 to R6.6 billion in 2021, however telecommunication revenue has slightly decreased by 0.5% from R201 billion in 2020 to R200 billion in 2021<sup>1</sup>,

Telecommunication sector generated more revenue than broadcasting sector and postal sector combined.

The revenue for the three sectors increased by 4.3% for a period of 7 years.

#### Graph 4: Total revenue of the 3 sectors, for the 12 months ending 30<sup>th</sup> September each year



Source: ICASA Electronic Telecommunications, Broadcasting and Postal Questionnaire 2015 – 2021

<sup>1</sup> Some of the 2020 data changed due to late submission by licensees

#### 3.2 Procurement spend from all suppliers in all 3 sectors

The total procurement spend from all suppliers for all three sectors was R124 billion in 2021.85.2% (R105 billion) of this amount was spent on suppliers on the basis of their B-BBEE rating level. The total broadcasting services procurement spend from all suppliers was R2.8 billion in 2021, with R2 billion (72%) of that spent on suppliers on the basis of their B-BBEE rating level. The total postal services procurement spend from all suppliers was R288 million in 2021, with R44 million (15.5%) of that spent on suppliers on the basis of their B-BBEE rating level.

Telecommunication procurement spend from all suppliers increased by 24.8% in 2021. The procurement spend from all suppliers from broadcasting and postal services decreased by 27.5% and 81.1% for the same period<sup>2</sup>.



Procurement spend from all suppliers in all 3 sectors Graph 5:

Source: ICASA Electronic Communications, Broadcasting and Postal Questionnaires, December 2015 – 2021

<sup>&</sup>lt;sup>2</sup> Some of the 2020 data changed due to late submission by licensees

#### 3.3 Employment levels for the three sectors that ICASA regulates

The total numbers for the three sectors employment decreased by 22.4% in 2021. Employment changes in the three sectors were as follows: telecommunications sector employment decreased by 35.8%, broadcasting sector employment also decreased by 18.7%, and postal sector employment increased by 2.1%.

Over a 7-year period, the total employment for the three sectors decreased by 4.7%. Telecommunications employment decreased by 5.5%, broadcasting employment decreased by 4.5% and postal service employment still shows a decline in terms of growth as it decreased by 3.5% for the same period<sup>3</sup>.



Graph 6: Total employment for the 3 sectors, as of 30<sup>th</sup> September each year

Source: ICASA Electronic Communications, Broadcasting and Postal Questionnaires 2015 - 2021

<sup>&</sup>lt;sup>3</sup> Some of the 2020 data changed due to late submission by licensees

#### 4 **TELECOMMUNICATIONS SECTOR**

In 2020, we have seen a slight increase in the telecommunications sector revenue while in 2021, we have seen a slight decrease by 0.5% from R201 billion in 2020 to R200 billion in 2021. The total mobile service revenue increased by 7.8% in 2021. The total fixed internet and data revenue and total fixed line revenue decreased by 19.4%. The total fixed line revenue decreased by 7.3% in 2021.

The Authority continues to work on regulatory initiatives aimed at reducing the cost to communicate. To this effect, the Authority has concluded an inquiry into the Broadband Services Market. The Authority's findings document was published on 26 March 2021. The purpose of the inquiry was to assess the state of competition and determine whether or not there are markets or market segments within the mobile broadband services value chain which may warrant regulation in the context of a market review in terms of section 67(4) of the ECA.

On the 17 March 2022, the Authority successfully concluded the much-anticipated high-demand radio frequency spectrum auction. The auction involved six (6) qualified bidders, i.e., Cell C, Liquid Intelligent Technologies, MTN, Rain Networks, Telkom and Vodacom.

#### 4.1 Telecommunications Sector Revenues

The total telecommunications revenue slightly decreased by 0.5% in 2021 from R201 billion in 2020 to R200 billion in 2021. The total mobile service revenue increased by 7.8% in 2021. The total fixed internet and data revenue and total fixed line revenue decreased by 19.4%. The total fixed line revenue decreased by 7.3% in 2021<sup>4</sup>.

For the period of 7 years, the total telecommunications revenue increased by 4.3%. The total mobile services revenue and total fixed internet and data revenue increased by 6.3% and 1.1%, respectively, however fixed line revenue decreased by 13.7% for the same period.

#### Graph 7: Telecommunications revenue, for the 12 months ending 30<sup>th</sup> September each year



Source: ICASA Electronic Communications Questionnaire 2015 - 2021

*Note:* Includes revenues from telecommunication services earned from retail fixed-telephone, mobile-cellular, internet and data services offered by telecommunication operators (both network and virtual, including resellers) and interconnection, equipment sales and any other revenue.

<sup>&</sup>lt;sup>4</sup> Some of the 2020 data changed due to late submission by licensees

#### 4.1.1 Total Mobile Services Revenue

The total mobile data services revenue from text and multimedia messaging services increased by 7.8% and 31.7%, respectively in 2021. The revenue from voice services slightly decreased by 0.1% in 2021<sup>5</sup>.

For a period of 7 years, total mobile services revenue and revenue from mobile data services increased by 6.3% and 9.9%, respectively. Revenue from voice services decreased by 2.5% for the same period.





Source: ICASA Electronic Communications Questionnaire 2015 - 2021

Note: This includes retail mobile revenue from the provision of voice services from national and international calls; outbound roaming abroad; mobile data; and text messaging and multimedia messaging (SMS and MMS) and any other mobile revenue. Excludes equipment revenue and termination (interconnection) revenue and any other revenue categories e.g., other wholesale services.

<sup>&</sup>lt;sup>5</sup> Some of the 2020 data changed due to late submission by licensees

#### 4.1.2 Total Fixed Internet and Data Revenues

The total fixed internet and data revenue decreased by 7.3% (from R25 billion in 2020 to R23 billion in 2021). Revenue from fixed (wired)-broadband services and fixed internet revenue decreased by 2.1% and 6.9%, respectively in 2021<sup>6</sup>.

Over a 7-year period, total fixed internet and data revenues increased by 1.1%. The revenue from fixed (wired)-broadband services decreased by 7.9% for the same period.



#### Graph 9: Fixed internet and data revenue, 12 months ending 30<sup>th</sup> September each year

Source: ICASA Electronic Communications Questionnaire, December 2015 - 2021

<sup>&</sup>lt;sup>6</sup> Some of the 2020 data changed due to late submission by licensees

#### 4.1.3 Total Fixed Line Revenue

The total fixed line revenue decreased by 19.4% from R8 billion in 2020 to 6 billion in 2021. Revenue from fixed-telephone subscription charges and revenue from fixed-telephone calls decreased by 23.1% and 7.8%, respectively in 2021<sup>7</sup>.

For a period of 7 years, the total fixed line revenue decreased by 13.7%.



Graph 10: Total Fixed line revenue, 12 months ending 30<sup>th</sup> September each year

Source: ICASA Electronic Communications Questionnaire, December 2015 - 2021

<sup>&</sup>lt;sup>7</sup> Some of the 2020 data changed due to late submission by licensees

#### 4.1.4 Prepaid Mobile Voice, Data, and Messaging Revenue

The revenue from both prepaid mobile data and voice increased by 8.2% and 0.6%, respectively in 2021. The prepaid revenue for mobile messaging decreased by 6.9% in 2021.

For a period of 7 years, revenue from prepaid mobile data increased by 15.4%. The revenue from prepaid mobile voice and messaging decreased by 0.4% and 9.4% respectively for the same period.



## Graph 11: Prepaid mobile voice, data and messaging revenue for the 12 months ending on 30<sup>th</sup> September each year

Source: ICASA Electronic Communications Questionnaire 2015 - 2021

#### 4.1.5 Prepaid data prices (month validity)

The Prepaid data bundle sizes range from 100 MB to 20480 MB for 2022, with prices ranges as indicated in the table below. The data bundles are valid for a period of a month with an automatic roll-over for any unused data remaining after the expiry of the validity period.

Prepaid data Bundle prices							
	2021	prices	2022 <sup>8</sup> prices				
Data Bundle (MB)	Lowest price Highest pri		Lowest price	Highest price			
100(MB)	R20	R20	R15	R20			
250 (MB)	R35	R35	R35	R35			
500 (MB)	R69	R79	R65	R69			
750 (MB)	R89	R89					
1024 (MB)	R95	R99	R79	R99			
1536 (MB)	R149	R149	R89	R99			
2048 (MB)	R139	R199	R139	R149			
3072 (MB)	R199	R279	R199	R229			
5120 (MB)	R299	R349	R299	R299			
6144 (MB)	R299	R399	R299	R349			
6656 (MB)	R399	R399					
10240 (MB)	R469	R499	R469	R469			
20480 (MB)	R699	R899	R599	R699			

#### Table 2: Prepaid data price (month validity)

Source: ICASA Electronic Communications Questionnaire for 2021-2022

<sup>&</sup>lt;sup>8</sup> Updated on 22 February 2022

#### 4.1.6 Post-paid data prices (month validity)

The post-paid data bundle, as indicated in the table below, shows the price ranges per Gigabyte for 2022.

Post-paid data Bundle prices							
Data Rundla (CR)	2021	prices	2022 <sup>9</sup> prices				
Data Bullule (GB)	Lowest price	Highest price	Lowest price	Highest price			
1 GB	R40	R79	R40	R79			
2 GB	R60	R110	R60	R119			
3 GB	R179	R179	R149	R179			
4 GB	R100	R100	R99	R100			
5 GB	R221	R221	R199	R215			
6 GB	R129	R129	R129	R129			
10 GB	R200	R332	R149	R320			
14 GB	R259	R259	R259	R259			
20 GB	R355	R539.38	R199	R539			
30 GB	R645	R645	R399	R645			
50 GB	R959	R959	R499	R959			
100 GB	R1,699	R1,699	R1,699	R1,699			
200 GB	R2,099	R2,099	R2,099	R2,099			

Table	3:	Post-paid	data	price	(month	validity)
				P	<b>`</b>	

Source: ICASA Electronic Communications Questionnaire for 2021 - 2022

<sup>&</sup>lt;sup>9</sup> Updated on 22 February 2022

#### 4.1.7 Prepaid and Post-paid Voice and Messaging prices

The price range per minute, for prepaid voice is from R0.66 to R2.50 and for postpaid is from R0.70 to R1.79.

The local SMS's prices range for prepaid is between R0.15 and R0.52 and post-paid is R0.30 to R0.55.

The international SMS's price range for prepaid is from R1.61 to R2 and post-paid is R1.52 to R1.61.

Price range	Voice (Per minute)	SMS (Local)	SMS (International)	
Prepaid	R0.66 to R2.50	R0.15 to R0.52	R1.61 to R2.00	
Post-paid	R 0.70 to R 1.79	R 0.30 to R 0.55	R 1.52 to R1.61	

 Table 4:
 Prepaid and post-paid voice and SMS prices

Source: ICASA Electronic Communications Questionnaire as of 2022

#### 4.2 Total Telecommunications Investment

The total telecommunications investment continues to decrease as shown in the graph below. In 2021 it decreased by 7% (from R36 billion in 2020 to R33 billion in 2021)<sup>10</sup>.

Over a 7-year period, the total telecommunications investment increased by 6.2%.



Graph 12: Total telecommunication investment, for the 12 months ending 30<sup>th</sup> September each year

Source: ICASA Electronic Communications, Broadcasting and Postal Questionnaires 2015 - 2021

 $<sup>^{1}</sup>$  Some of the 2020 data changed due to late submission by licensees

#### 4.2.1 Telecommunications Investment Breakdown

Telecommunications investment breakdown is shown on the table below in 2021.

Over a 7-year period, the investment in fixed-telephone services and annual investment in fixed (wired)-broadband services decreased by 22.6% and 1.6%, respectively.



Graph 13: Telecommunication investment breakdown, for the 12 months ending 30<sup>th</sup> September each year



#### 4.3 Telecommunications Procurement Spend from All Suppliers Based on B-BBEE Ranking

The proportion of telecommunications procurement spend from all suppliers based on the B-BBEE ranking levels spend was 85.2% in 2021<sup>11</sup>.



Graph 14: Telecommunication procurement spend from all suppliers based on the B-BBEE, for the 12-month period ending 30<sup>th</sup> September each year

Source: ICASA Electronic Communications Questionnaire 2016 - 2021

 $<sup>^{1}</sup>$  Some of the 2020 data changed due to late submission by licensees

#### **4.4 National Population Coverage**

National population coverage for 3G was at 99.9% in 2021.

National population coverage for 4G/LTE was at 97.7% in 2021.

5G population coverage is growing, in 2020 it was at 0,7% and in 2021 is at 7.5%.



Graph 15: National population coverage for 3G, 4G/LTE and 5G

Source: ICASA Electronic Communications Questionnaire 2015 - 2021

#### 4.4.1 Rural Population Coverage

In 2021, with respect to 2G and 3G, all provinces are at 100% coverage as reported by the licensees. Regarding 4G/LTE coverage all provinces are above 96% for the same period. Free State, Gauteng and Western Cape have 5G coverage as shown in the graph below.



Graph 16: Rural Population Covered per province in 2021

Source: ICASA Electronic Communications Questionnaire 2021

#### 4.4.2 Urban Population Coverage

In 2021, with respect to 2G, 3G, and LTE coverage, all provinces are at (99% to 100%).

5G coverage in urban areas is showing a positive growth in all provinces as shown in the table below, with Kwazulu-Natal on the lead with 20% for the same period.



Graph 17: Urban Population Covered per province in 2021

Source: ICASA Electronic Communications Questionnaire 2021

#### 4.5 Mobile Cellular and Smartphone Subscriptions

Mobile cellular subscriptions were 94 million in 2020 and 103 million in 2021. Smartphone<sup>12</sup> subscriptions were 60 million in 2020 and 65 million in 2021.





Source: ICASA Electronic Communications Questionnaire. 2015 - 2021

<sup>&</sup>lt;sup>1</sup> A smartphone is a mobile phone with advanced features: it has Wi-Fi connectivity, web browsing capabilities, a high-resolution touchscreen display and the ability to use apps. The majority use one of the following mobile operating systems: Android, Symbian, iOS, and Windows Mobile

#### 4.5.1 Total Number of LTE Devices

The total number of LTE devices increased by 47.4% (from 32 million in 2020 to 47 million in 2021) nationally.

In 2021, the total number of 58,604 devices were recorded with unknown location as shown in the graph below.



Graph 19: Total number of LTE Devices per Province in 2021

Source: ICASA Electronic Communications Questionnaire 2018 - 2021

#### 4.6 Persons Employed in the Telecommunications Sector

The total employment in the telecommunications sector significantly decreased by 35.8% from 34,329 in 2020 to 22, 055 in 2021. Female employees as a proportion of the total employment also decreased by 32.9% from 12,820 in 2020 to 8,603 in  $2021^{13}$ .

Over a 7-year period, telecommunications sector total employment and female employment decreased by 5.5% and 4.5%, respectively.



Graph 20: Persons employed in the telecommunications sector, as of the 30<sup>th</sup> of September each year

Source: ICASA Electronic Communications Questionnaire 2015 - 2021

<sup>&</sup>lt;sup>1</sup> Some of the 2020 data changed due to late submission by licensees

#### 4.7 Persons employed in the telecommunications sector breakdown

In 2021, there were about 12 thousand skilled persons, 4530 semi-skilled persons and 191 persons with disabilities employed in the telecommunications sector.





Source: ICASA Electronic Communications Questionnaire 2018 - 2021

#### 4.8 Black Economic Empowerment Employment Measures

In 2021, Top Management (EXCO members) employment increased by 10.8% from 232 in 2020 to 257 in 2021. Top Black Management employment increased by 25.3% from 83 in 2020 to 104 in 2021 and, Top Female Management employment increased by 29.7% from 37 in 2020 to 48 in 2021.

For a period of 5 years, Top management increased by 7.6%.



Graph 22: Telecommunication Black Economic Empowerment Measures, for the 12-month period ending 30<sup>th</sup> September each year

Source: ICASA Electronic Communications Questionnaire 2017 - 2021
#### 4.9 Telecommunications Subscriptions

### 4.9.1 Mobile Cellular (Prepaid and Post-paid mobile Cellular Phone Voice) Subscriptions

The total mobile cellular phone voice subscriptions increased by 8.7% from 94 million in 2020 to 103 million in 2021. Prepaid and postpaid mobile-cellular telephone subscriptions increased by 9.3% and 5.3%, respectively in 2021.

For a period of 7 years, the total mobile cellular phone voice subscriptions increased by 2.9%.



Graph 23: Prepaid and post-paid mobile cellular voice subscriptions, as of 30<sup>th</sup> September each year

Source: ICASA Electronic Communications Questionnaire 2015 - 2021

Note: The definition of prepaid subscribers is adopted from the ITU definition of 3-month active subscribers. Some South African operators do not have this metric available but rather count SIMs that have not been disconnected within a 90-day window implying that the number may be overstated according to the strict definition. Top up bundles and machine-to-machine subscriptions were included in post-paid mobile cellular subscriptions.

#### 4.9.2 Mobile Cellular Active Subscriptions (Active for more than 90 Days)

Mobile Cellular active subscriptions decreased by 0.1% from 64,151,355 in 2020 to 64,113,022 in 2021.

## Graph 24: Mobile Cellular Active Subscriptions (Active for more than 90 Days), as of 30<sup>th</sup> September 2021



Source: ICASA Electronic Communications Questionnaire 2015 - 2021

*Note: The definition of prepaid subscribers is adopted from the ITU definition of 3-month active subscribers. Some South African operators do not have this metric available but rather count SIMs that have not been disconnected within a 90-day window implying that the number may be overstated according to the strict definition. Top up bundles and machine-to-machine subscriptions were included in post-paid mobile cellular subscriptions.* 

#### 4.9.3 Mobile Cellular Phone Data users

Mobile cellular data users significantly decreased by 46% (from 75 million in 2020 to 40 million in 2021).

Mobile data users decreased by 2.2% for a period of 7 years.



# Graph 25: Mobile cellular phone data subscriptions, as of 30<sup>th</sup> September each year

#### Source: ICASA Electronic Communications Questionnaire 2015 - 2021

Note: All LTE connections are included in 'mobile<sup>7</sup>. There is room for the definition of 'mobile broadband subscriptions' to be improved in subsequent reports, noting that it was not possible to accurately distinguish between handset data usage and mobile data usage on other devices, or alternatively to distinguish SIMs used for both voice and data from SIMs dedicated to data usage. It was also necessary to count total internet subscriptions rather than 'broadband' subscriptions, as it was not possible to accurately break out 'narrowband' internet, albeit this is now a small minority of total internet subscriptions. 'Wireless broadband' number may be incomplete in respect of some players, especially those operating in unlicensed spectrum bands.

#### 4.9.4 Fixed Line Voice Subscriptions

Fixed line voice subscriptions decreased in all categories as shown in the graph below.

Over a 7-year period, Fixed line subscriptions decreased by 14.9%.



Graph 26: Fixed line subscriptions, as of 30<sup>th</sup> September each year

Source: ICASA Electronic Communications Questionnaire, December 2015 - 2021

#### 4.9.5 Fixed Line Broadband Subscriptions

The total fixed broadband subscriptions increased by 20.4%, and fibre-to-thehome/building internet subscriptions increased by 34.4% in 2021. However, the DSL internet subscription decreased by 30.2% for the same period<sup>14</sup>.

For a period of 7 years, fixed broadband subscriptions increased by 8.4%.



Graph 27: Fixed broadband subscriptions, as of 30<sup>th</sup> September each year

Source: ICASA Electronic Communications Questionnaire 2015 - 2021

<sup>&</sup>lt;sup>1</sup> Some of the 2020 data changed due to late submission by licensees

#### 4.9.6 Machine-to-Machine (M2M) Mobile Subscriptions

M2M mobile-network subscriptions increased by 5.5% from 8.8 million in 2020 to 9.3 million in 2021.

Over a 7-year period, M2M mobile-network subscriptions increased by 13.6%.



Graph 28: M2M mobile-network subscriptions, as of 30<sup>th</sup> September each year

Source: ICASA Electronic Communications Questionnaire 2015 - 2021

#### 4.9.7 Wireless-broadband subscriptions

The total wireless-broadband subscriptions decreased by 7% (from 244,876 in 2020 to 227,840 in 2021). Satellite subscriptions significantly increased by 54.2% in 2021, and terrestrial fixed broadband subscriptions decreased by 10.3% for the same period.

For a period of 7 years, the total wireless-broadband subscriptions increased by 7.3%.



Graph 29: Wireless-broadband subscriptions, as of 30<sup>th</sup> September each year

Source: ICASA Electronic Communications Questionnaire 2015 - 2021

#### 4.10Network Traffic

This section highlights the usage of operator networks in terms of traffic volumes in minutes.

#### 4.10.1 Fixed Line Traffic

2017

2018

2019

2020

2021

The total fixed line traffic decreased by 18.5% (from 4.1 billion in 2020 to 3.3 billion in 2021).

For a period of 7 years, total fixed line traffic decreased by 12.1%.



3 644 927 197

3 139 633 506

3 833 825 566

2 607 594 305

1 869 197 103

Fixed line traffic, in minutes, for the 12-month period ending Graph 30:

Source: ICASA Electronic Communications Questionnaire 2015 - 2021

5 954 515 149

5 208 521 164

6 365 441 002

4 167 973 810

3 398 520 058

2 309 587 952

2 068 887 658

2 531 615 436

1 560 379 505

1 529 322 955

#### 4.10.2 Fixed-to-Mobile Telephone Traffic

Fixed-to-mobile telephone call traffic decreased by 34.3% from 9 billion in 2020 to 5 billion in 2021.

Over a period of 7 years, fixed-to-mobile telephone call traffic increased by 2.3%.



Graph 31: Fixed-to-mobile telephone traffic minutes, for the 12-month period ending 30<sup>th</sup> September each year

Source: ICASA Electronic Communications Questionnaire 2015 - 2021

#### 4.10.3 International (Incoming and Outgoing) Fixed Telephone Traffic

International (incoming and outgoing) fixed-telephone call traffic increased by 41.6% from 227 million minutes in 2020 to 322 million in 2021. The international incoming fixed-telephone calls decreased by 37.5% for the same period.

For a period of 7 years, the international (incoming and outgoing) fixed-telephone traffic has decreased by 8.9%.



#### Graph 32: International fixed line traffic in minutes (million) for the 12month period ending 30<sup>th</sup> September each year

Source: ICASA Electronic Communications Questionnaire 2015 - 2021

#### 4.10.4 Total national mobile traffic (Minutes)

The total national mobile traffic in minutes increased by 30.7% in 2021. Mobile to other mobile networks and Mobile to fixed increased by 17.6% and 33.7%, respectively. The outgoing mobile traffic to same mobile network increased by 35.1% for the same period.

For a period of 7 years, total national mobile traffic in minutes increased by 3.4%.



Graph 33: Mobile voice traffic in minutes for the 12-month period ending 30<sup>th</sup> September each year

Source: ICASA Electronic Communications Questionnaire 2015 - 2021

# 4.11 International Internet Bandwidth Capacity in Megabits per second (Mbps)

The total international internet bandwidth (Mbps) capacity increased by 18.8% in 2021. International incoming internet bandwidth increased by 25.5% in 2021.

For a 7-year period, the total international internet bandwidth capacity increased by 17.9%.



Graph 34: International internet bandwidth Megabits per second (Mbps) for the 12-month period ending 30<sup>th</sup> of September each year

Source: ICASA Electronic Communications Questionnaire 2015 - 2021

#### 4.12 International Comparison of South Africa's Internet Speeds

The internet speed for fixed broadband and mobile (download and upload speed) for South Africa was compared to other countries to have a better understanding of its growth and how it is performing internationally.

#### 4.12.1 International speedtest benchmarks

According to the global Speedtest, the fixed broadband speed ranking for South Africa has dropped down, from 87 in 2020 to 100 in 2021. The mobile broadband ranking also dropped from 55 in 2020 to 61 in 2021.



Graph 35: Speedtest benchmark in 2021

Source: OOKLA, Speeedtest intelligence 2021

#### 4.12.2 Speedtest benchmark with BRICS countries

In 2021, when benchmarking against the BRICS countries, South Africa's speedtest ranking of 100 for fixed broadband was the lowest ranking in the grouping. South Africa's speedtest ranking of 61 for mobile broadband was the second best in the BRICS grouping, which is led by China with a speedtest ranking of 4.



Graph 36: Speedtest benchmark BRICS countries in 2021

Source: OOKLA, Speeedtest intelligence 2021

#### 4.12.3 Speedtest benchmark with neighbouring countries

In 2021, South Africa's speedtest ranking of 100 for fixed broadband was the highest when compared to other neighbouring countries followed by Lesotho at the ranking of 120. Likewise, South Africa's ranking of 61 for mobile broadband was the highest amongst its neighbouring countries followed by Botswana at the ranking of 66.



Graph 37: Speedtest benchmark neighbouring countries in 2021

Source: OOKLA, Speeedtest intelligence 2021

### 4.13 Number of Schools Connected to the Internet Based on Obligations Imposed by ICASA

The total number of schools connected to the internet based on universal service obligations imposed by ICASA was 6,085 as at 2021.



Graph 38: Number of schools connected to the internet as of 2021

Source: ICASA Electronic Communications Questionnaire 2015 - 2021

#### **5 BROADCASTING SECTOR**

In April 2020, in response to the COVID-19 outbreak, the Authority relaxed various broadcasting regulatory measures in terms of the ICT COVID-19 National State of Disaster Regulations, 2020. The Regulations sought to enable the licensees to swiftly adjust their operations in response to the lockdown regulations which are aimed at, inter alia, alleviating, containing, and minimising the effects of the COVID-19 National Disaster. The Regulations also sought to ensure that the public, including persons with disabilities are timeously informed of the government's measures aimed at managing and mitigating the COVID-19 National Disaster. On 11 November 2021, the Authority published the ICT COVID-19 National State of Disaster Regulations, 2021, which incorporated the broadcasting provisions of the 2010 Regulations. These Regulations are effective until the termination of the COVID-19 National Disaster.

In 2020, we have seen a significant decrease in revenue in the broadcasting sector. We have started to see revenue increased by 2.8% from 35.8 billion in 2020 to 36.7 billion in 2021. Revenue from advertising and subscriptions slightly increased by 1% and 0.3%, respectively in 2021. However, the infomercial revenue decreased by 29.6% for the same period.

#### **5.1 Broadcasting Revenue**

The total broadcasting services revenue increased by 2.8% from 35.8 billion in 2020 to 36.7 billion in 2021. Revenue from advertising and subscriptions slightly increased by 1% and 0.3%, respectively in 2021. However, the infomercial revenue decreased by 29.6% for the same period.

For the period of 7 years, the total revenue from broadcasting services increased by 4.2%. Revenue from subscriptions increased by 4.5% for the same period.



Graph 39: TV and Radio broadcasting revenues for the 12-month period

Source: ICASA Broadcasters Questionnaire, December 2015 - 2021 (\*data includes TV & radio broadcasting\*)

#### 5.2 Broadcasting Black Economic Empowerment Measures

The proportion of procurement spend from suppliers based on their B-BBEE ranking as a percentage of total spend from all suppliers was above 70% from 2016 to 2021 as shown in the graph below.



Graph 40: Broadcasting sector procurement spend from all suppliers based on B-BBEE, for the 12-month period ending 30<sup>th</sup> September

Source: ICASA Broadcasters Questionnaire, December 2016 - 2021

#### 5.3 Programme expenditure

Programme expenditure increased by 18.7% from R12.1 billion in 2020 to R14.4 billion in 2021. For a period of 7 years, it increased by 4.7%.



**Graph 41: Program expenditure as of 30<sup>th</sup> September each year** 

Source: ICASA Broadcasters Questionnaire, December 2015-2021

#### 5.4 Broadcasting productions expenditure

Total broadcaster and total local independent productions expenditure increased by 75.1% and 53.8% in 2021. Total international independent productions decreased by 16.6% for the same period.



Graph 42: Broadcasting productions expenditure as of 30<sup>th</sup> September each year

Source: ICASA Broadcasters Questionnaire, December 2018 - 2021

#### 5.5 Number of Pay TV Subscribers

The total number of Pay TV subscriptions increased by 1.2% (From 8.2 million in 2020 to 8.3 million in 2021).

For the period of 7 years, Pay TV subscriptions increased by 6.7%.



Graph 43: Number of Pay TV subscribers as of 30<sup>th</sup> September each year

Source: ICASA Broadcasters Questionnaire, December 2015 - 2021

#### 5.6 Total Number of Television Stations and Distributors

The number of set-top boxes increased by 10.2% (from 18.6 million in 2020 to 20.5 million in 2021). The number of Digital satellite stations increased by 1.9% in 2021. However, number of Digital Terrestrial stations decreased by 4.4% in 2021, while the number of content distributions remains the same from 2020 to 2021.



**Graph 44:** Total Number of Television Stations and Distributors as of 30<sup>th</sup> September each year

Source: ICASA Broadcasters Questionnaire, December 2017 - 2021

*Note:* \*One of the operators did not submit the Analogue terrestrial station in 2021\* \*Some of the operators did not have the content distributors in 2021\* \*Government subsidies set-top boxes are not included \*

#### 5.7 Total Number of transmissions and licences subscriptions

The number of transmission sites for radio is at 1,686 in 2021. The number of operational subscription TV licensees is 4 in 2021. The number of Free-To Air TV licensees is 2 for the same period.



Graph 45: Total Number of transmissions and licenses subscriptions

Source: ICASA Broadcasters Questionnaire, December 2021

#### **5.8 Total Number of broadcasting productions**

Local independent productions were 104 in 2021 and the international independent productions were 115 for the same period.



Graph 46: Total Number of broadcasting productions as of 30<sup>th</sup> September each year

Source: ICASA Broadcasters Questionnaire, December 2018 - 2021

#### **5.9 Broadcasting Sector Employment**

The total number of people employed in the broadcasting sector decreased by 19%. Female employees decreased by 18% in 2021.

Over a 7-year period, the total number of people employed in the broadcasting sector decreased by 5.4% and the female employment increased by 4.4%.



Graph 47: People employed in the broadcasting sector, as of the 30<sup>th</sup> of September each year

Source: ICASA Broadcasters Questionnaire, December 2015 - 2021

#### 5.9.1 Breakdown of Persons Employed in the Broadcasting Sector

The breakdown of broadcasting employment is as follows; the skilled employment decreased by 12.5% from 2,340 in 2020 to 2,048 in 2021, the disabled employment decreased by 18.8% in 2021, and semi-skilled decreased by 35% for the same period.



Graph 48: Persons employed in the broadcasting sector breakdown in 2021

Source: ICASA Broadcasters Questionnaire, December 2018 - 2021

### 5.9.2 Proportion of Black People in Top Management in the Broadcasting Sector

Top management (EXCO members) employees decreased from 100 in 2020 to 88 in 2021. Black top management employees decreased from 78 in 2020 to 56 in 2021. Top female employees also decreased from 41 in 2020 to 32 in 2021.



Graph 49: Broadcasting Black Economic Empowerment Measures, for the 12-month period ending 30<sup>th</sup> September each year

Source: ICASA Broadcasters Questionnaire, December 2017 - 2021

#### **6 POSTAL SERVICES SECTOR**

As part of the regulatory measures aimed at alleviating, containing, and minimising the effects of the COVID-19 National Disaster, the Authority prescribed the ICT COVID-19 National State of Disaster Regulations, 2021. The Regulations seeks to mandate the South African Post Office to make available its national address system to law enforcement agencies, for the purposes of tracking and tracing persons that are infected with COVID-19.

The postal services sector is an important component of the economic sector in South Africa contributing approximately 3,16% to GDP, the percentage includes the courier and express parcel companies.

The Postal services sector continues to register the highest percentage increase in revenue among the three sectors regulated by the Authority. The Postal Sector revenue increased by 11%, from R5.9 billion in 2020 to R6.9 billion in 2021.

In October 2021, the Authority published the Customer Care Standards Amendment Regulations Applicable to the Postal Services Licensee, 2021 in terms of section 4(3)(j) of ICASA Act read together with section 2 (h) and (l) of the Postal Service Act.

The Amendment Regulations seek to, *inter alia*, strengthen the provision of quality postal services through setting out minimum standards to protect and promote the interests of customers; align the regulations to the related customer protection legislation and current practices (i.e., clarifying process and procedures for customer complaints resolutions); and to enable the Authority to monitor and enforce compliance with the customer care standards provided.

#### **6.1 Postal Sector Revenue**

The Postal services revenue increased by 11%, from R5.9 billion in 2020 to R6.9 billion in 2021.

Irrespective of all challenges faced by the sector over these years, for a period of 7 years the postal services revenue increased by 3.7%.

## Graph 50: Postal sector revenue, 12-month period ending 30<sup>th</sup> September each year



#### 6.2 Postal Sector Black Economic Empowerment Measures

The proportion of the postal sector procurement spend based on suppliers' B-BBEE ranking as a percentage of overall spend from all suppliers was at 15.4% in 2021.





*Source: ICASA Postal Questionnaire, December 2016 - 2021 Note: \*we had low response rate from unreserved postal sector\** 

#### 6.3 Total Letter delivery services (Registered letters)

The total letter delivery services (Registered letters) decreased by 9.7% from 336 million in 2020 to 331 million in 2021. Domestic service and international outbound (Local Volumes) decreased by 10% and the domestic service and international outbound (International mail centre volume) increased by 21.4% in 2021.



Graph 52: Total number of letter delivery services (registered letters), as of 30<sup>th</sup> September each year

#### 6.4 Total numbers of Parcel delivery services

The total numbers of parcel delivery services decreased by 3.6% from 8.4 million in 2020 to 8.1 million in 2021 for both local and international mail centre volumes.



Graph 53: Total number of parcel delivery services, as of 30<sup>th</sup> September each year

# 6.5 Number of PO Boxes, PO Boxes rented, and Physical addresses in database

The number of PO Boxes and PO Boxes rented remains the same from 2020 to 2021 as shown in the graph below, however the number of physical addresses in the database slightly increased by 0.2% (from 16.7 million 2020 to 16.8 million 2021.



Graph 54: Number of PO Boxes, PO Boxes rented, and physical addresses in database as of 30<sup>th</sup> September each year

#### 6.6 Postal Service Sector Employment

The total employment in the postal sector increased by 2.1% in 2021. Female employment decreased by 2.3% in 2021.

For a period of 7 years, the total number of people employed in the postal sector decreased by 3.5%.



Graph 55: Persons employed in Post Service Sector, by gender, as of 30<sup>th</sup> September each year

#### 6.7 Breakdown of Persons Employed in the Postal Sector

The semi-skilled employees slightly increased by 0.7% and skilled employees increased by 4%. However, the number of employees that are unskilled remains the same in 2020 and 2021 with the total number of 823.



Graph 56: Persons employed in the postal sector breakdown, for the 12month period ending 30<sup>th</sup> September each year
#### 6.8 Postal service sector Black Economic Empowerment Measures

The top management (EXCO members) decreased by 13.9% and top black management decreased by 22.2% in 2021. However, the top black female management did not change for the same period.



Graph 57: Postal sector Black Economic Empowerment Measures, for the 12-month period ending 30<sup>th</sup> September each year

*Source: ICASA Postal Questionnaire, December 2017 - 2021 Note: \*we had low response rate from unreserved postal sector\** 

#### 7 CONCLUSION

# The following highlights are worth noting for the three sectors (telecommunications, broadcasting, and postal services)

- The total sector revenue (telecommunications, broadcasting and postal) slightly increased by 0.3% from R243 billion in 2020 to R243.6 billion in 2021. The broadcasting services revenue increased by 2.8% from R35 billion in 2020 to R36 billion in 2021, and postal services revenue increased by 11.1% in 2021, however telecommunications revenue slightly decreased by 0.5% in 2021
- The total telecommunications services procurement spends from all suppliers in 2021 was R124 billion. 85.2% (R105 billion) of this amount was spent on suppliers based on their B-BBEE rating level. The total broadcasting services procurement spend from all suppliers was R2.8 billion in 2021. R2 billion (72%) of this amount was spent on suppliers based on their B-BBEE rating level. The total postal services procurement spend from all suppliers was R288 million in 2021. R44 million (15.5%) of this amount was spent on suppliers based on their B-BBEE rating level.

# The following highlights are worth noting with respect to the telecommunications sector

- The total mobile data services and revenue from text and multimedia messaging services increased by 10.5% and 31.7%, respectively in 2021. The revenue from voice services slightly decreased by 0.1% in 2021.
- The total fixed internet and data revenue decreased by 7.3% (from R25 billion in 2020 to R23 billion in 2021). Revenue from fixed (wired)-broadband services and fixed internet revenue decreased by 2.1% and 6.9%, respectively in 2021.

- The proportion of telecommunications procurement spend from all suppliers based on the B-BBEE ranking levels was 83.1% in 2021
- 5G population coverage is growing, in 2020 it was at 0,7% and in 2021 was at 7.5%.

# The following highlights are worth noting with respect to the broadcasting sector

- The number of set-top boxes increased by 10.2% (from 18.6 million in 2020 to 20.5 million in 2021). The number of Digital satellite stations increased by 1.9% in 2021. However, the number of Digital Terrestrial stations decreased by 4.4% in 2021, while the number of content distributions remains the same from 2020 to 2021.
- The total number of people employed in the broadcasting sector decreased by 19%. Female employees decreased by 18% in 2021.

### The following highlights are worth noting for the postal services sector

- The Postal services revenue increased by 11%, from R5.9 billion in 2020 to R6.9 billion in 2021.
- The proportion of the postal sector procurement spend based on suppliers' B-BBEE ranking as a percentage of overall spend from all suppliers was at 15.4% in 2021.
- The total letter delivery services (Registered letters) decreased by 9.7% from 336 million in 2020 to 331 million in 2021. Domestic service and international outbound (Local Volumes) decreased by 10% and the domestic service and international outbound (International mail centre volume) increased by 21.4% in 2021.

# APPENDICES

Appendix 1: ICASA questionnaire respondents, January 2021		
	ICASA questionnaire respondents, January, 2022	
Telecom	munication's Licensees	
1	Afrihost SP (Pty) Ltd	
2	Airband High Speed Internet (Pty) Ltd	
3	Amobia Communications (Pty) Ltd	
4	ASK Internet Technologies CC	
5	AT&T South Africa (Proprietary) Limited	
6	Atcomm (Pty) Ltd t/a Ntelecom	
7	Axxess DSL (Pty) LTD	
8	Bethnet cc	
9	BITCO TELECOMS	
10	Border Internet (Pty) Ltd	
11	Borwood Communications	
12	Breedenet (Pty) Ltd	
13	BSS Digital	
14	Bundu NetworX (Pty) Ltd	
15	Cell C Ltd	
16	CENTURY CITY CONNECT (PTY) LTD	
17	China Telecom South Africa (Pty) Ltd	
18	Cloud Connect Networks (Pty) Ltd	
19	Cloud Karoo	
20	Compatel	
21	Comput8 IT (Pty) Ltd t/a COMPUTATE	
22	Comsol Networks	
23	CRAZYWEB TECH PTY LTD	
24	CUBE ICT SOLUTIONS (PTY) LTD	
25	Cutman Bush Net	
26	CWNET	
27	Cybersmart (Pty) Ltd	
28	Dark Fibre Africa Proprietary Limited	
29	Datonet (Pty) Ltd	
30	Dimension Data	
31	Dube TradePort Corporation	

32	E WISP
33	Edelnet
34	Equation Business Solutions Pty Ltd
35	FRANCOIS O'KENNEDY W.O.R.X (PTY) LTD
36	FUSION VOICE & DATA
37	Fusion Wireless (Pty) Ltd
38	Future Perfect Corporation CC T/A Vanilla
39	Heinrich Heunis
40	Hi-Tech Wireless (Pty) Ltd
41	HX Systems (Pty) Ltd
42	ICTGlobe Management
43	Imply IT (Pty) Ltd
44	InterActive Systems Designs (Pty) Ltd
45	Interexcel World Connection (Pty) Ltd
46	Internet Generation (Pty) Ltd
47	Internet Solutions Digital Pty Ltd
48	Internet Uncapped CC
49	iONLINE ISP
50	IZAK SCHALK WILLEM VAN ZYL
51	Kibo Connect (Pty) Ltd
52	Kliq Holdings
53	kosh Communication Services (Pty) Ltd
54	La Rochelle IT Solutions (Pty) Ltd
55	Lasernet Pty Ltd
56	LBJ GROENEWALD
57	LCOM (PTY) LTD
58	Letaba Wireless Internet
59	Lidino Trading 534 T/A Nuwcom Wireless
60	Link Africa (Pty) Ltd
61	Linux Based Systems Design SA (Pty) Ltd
62	Liquid Telecommunications South Africa (Pty) Ltd
63	Metro Fibre Networx Pty Ltd
64	MTN SA (Ltd)
65	NCW (Pty) Ltd t/a NetCom Wireless
66	Netwide Internet Services

67	NEXUS NET WIRED & WIRELESS
68	Orange Business Services South Africa Pty Ltd
69	Platoon Trade and Invest 149 (PTY) LTD TA Wanatel PTY) LTD
70	Pronto Computer Solutions
	Purple Pebble Productions (Pty) Ltd (Formerly Purple Pebble Productions Cc T/A
71	Purple Turtle Communications)
72	Radiospoor Welkom Pty Ltd
73	Rain Networks (Pty) Ltd
74	Safricom North West Pty Ltd
75	SCAN RF Projects (Pty) Ltd
76	SEAGLE TELECOM
77	Simigenix (Pty) Ltd
78	SKYBER WIFI ENTERPRISES
79	Skynology (PTY)LTD
80	SMS CELLULAR SERVICES PTY LTD
81	SMS PORTAL (PTY) LTD
82	Snowball Effect (Pty) Ltd & Wish Networks (Pty) Ltd
83	Sonic Computers & Wifi CC
84	Spiderink Bookkeeping Services
85	STUART VINCENT BODILL
86	Telkom SA SOC Ltd
87	Telviva (Pty) Ltd
88	Tribal Zone Telecommunications (Pty) Ltd
89	Trusc Technologies (Pty) Ltd
90	TT CONNECT (RF) (PTY) LTD
91	Vangibuzz (Pty) Ltd t/a True Communications
92	Viva Telecoms
93	Vodacom (Pty) Ltd
94	Vox Telecommunications (Pty) Ltd
95	Voys Telecom SA (Pty) Ltd
96	Vumatel (Pty) Ltd
97	Wireless Associate Service Provider CC
98	Wispernet
	Xlink
100	XPRESS LIMPOPO - GLORIFICO (PTY) LTD

101	XPRESS WIRELESS MAPUMALANGA - CARMENTA (PTY) LTD
102	XPRESS WIRELESS NORTH WEST – XPRESS WIRELESS (PTY) LTD
Broadca	sting Licensees
1	100.5FM Radio Laeveld
2	Bokone Bophirima FM
3	Bush Radio
4	Deukom (Pty) Ltd
5	ΕΤν
6	Faith Broadcasting Terrestrial
7	Fine Music Radio
8	Groot FM
9	Impact Radio
10	Lekoa Multi-Media and Communication D C
11	Life Broadcasting
12	LINK FM TRUST
13	MedFm
14	Modiri FM
15	Multichoice (Pty) Ltd
16	Noponi Rural Development t/a Ngqushwa FM
17	On Digital Media (Pty) Ltd
18	PERRON FM
19	Pretoria FM
20	Primedia Broadcasting
21	Radio Islam
22	Radio Tygerberg
23	SOUTH AFRICAN BROADCASTING CORPORATION (Radio)
24	SOUTH AFRICAN BROADCASTING CORPORATION (TV)
25	TSHEPO FM
26	UMOYA COMMUNICATIONS (PTY) LTD
27	Wild Coast FM
28	Witzenberg Radio
Postal S	ervices Licensees
1	FASTWAY COURIERS
2	PATHTEQ QPL LOGISTICS
3	South African Post Office

4	Postnet SA
5	RC Couriers
6	Royale International
7	The Courier Guy

#### Appendix 2: Definitions of Telecommunications categories

Definitions of Telecommunications categories		
ICT	Information Communication Technology	
Stats SA	Statistics South Africa	
ECS	Electronic Communications Services	
ECNS	Electronic Communications Network Services	
GHS	General household survey	
ISP's	Internet Service Providers	
Telecommunications sector		

The telecommunications sector comprises fixed and mobile telecommunications services as well as the provision of Internet access.

#### Total telecommunication investment

Total annual investment in telecommunication services, also referred to as annual capital expenditure, refers to the investment during the financial year in telecommunication services (including fixed, mobile and Internet services) for acquiring or upgrading property and networks. Property includes tangible assets such as plant, intellectual and non-tangible assets such as computer software. The indicator is a measure of investment in telecommunication infrastructure in the country and includes expenditure on initial installations and additions to existing installations where the usage is expected to be over an extended period of time. It excludes expenditure on research and development (R&D), annual fees for operating licences and the use of radio spectrum, and investment in telecommunication software or equipment for internal use.

Annual investment in fixed-telephone services

Refers to investment in fixed-telephone services for acquiring and upgrading property and networks within the country. This refers to annual investment in assets related to fixed-telephone networks and the provision of services.

Annual investment in fixed (wired) broadband services

Refers to investment in fixed (wired)-broadband services for acquiring and upgrading property and networks within the country. This refers to annual investment in assets related to fixed (wired)-broadband networks and the provision of services.

Annual investment in mobile communication services

Refers to investment in mobile services for acquiring and upgrading property and networks within the country. It should include investments made for mobilebroadband services. This refers to annual investment in assets related to mobile communication networks and the provision of services. It should include investment in mobile-broadband networks.

Other annual investment in telecommunication services

Refers to investment in other telecommunication services, such as fixed wirelessbroadband, satellite and leased lines.

#### Total telecommunications revenue

The aggregated revenue includes the total telecommunications services revenue and any other revenue.

### Total telecommunication services revenue

The sum of revenue from all telecommunication services (in local currency at current prices). Revenue from all telecommunication services refers to revenue earned from retail fixed-telephone, mobile-cellular, Internet and data services offered by telecommunication operators (both network and virtual, including resellers) offering services within the country during the financial year under review. It includes retail revenues earned from the transmission of TV signals but excludes revenues from TV content creation. Exclude: (i) wholesale revenues (e.g. termination rates), (ii) revenues from device sales and rents, (iii) VAT and excise taxes. Any deviation from the definition should be specified in a note, including clarifications on what TV revenues are included/excluded (e.g. IPTV, cable TV, pay satellite and free-to-air TV).

Total fixed line services revenue

This aggregate value is defined as the sum of Fixed line voice revenue, fixed (wired) internet revenue, Other fixed (wireless) broadband revenue and Other fixed telecommunications services revenue as defined below.

Total fixed line voice revenue

Sum of revenue from retail fixed-telephone services refers to revenue received for the connection (installation) of fixed-telephone services, revenue from recurring charges for subscription to the PSTN and revenue from fixed-telephone calls.

Revenue from fixed-telephone connection charges

Revenue from fixed-telephone connection charges refers to retail revenue received for connection (installation) of fixed- telephone services. This may include charges for transfer or cessation of services.

Revenue from fixed-telephone subscription charges

Revenue from fixed-telephone subscription charges refers to revenue from recurring charges for subscriptions to the PSTN, including Internet access if it cannot be separated from fixed-telephone.

*Revenue from fixed-telephone calls* 

Revenue from fixed-telephone calls refers to retail fixed-telephone revenue received from charges for local, national long-distance and international calls.

### Fixed (wired) internet revenue

Revenue from fixed (wired) Internet services refers to retail revenue received from the provision of fixed (wired) Internet services such as subscriptions, traffic and data communication. It excludes the provision of access lines used to connect to fixed (wired) Internet (such as fixed-telephone lines used to access DSL connections). This includes revenue from fixed (wired)-broadband services (previously a separate indicator under ITU code i7311\_fb, but for reporting purposes here counted together with any small residual narrowband internet revenue in a single indicator, viz. fixed wired internet).

# Other (wireless) broadband services revenue

Revenue from other wireless-broadband services refers to the retail revenue received from the provision of high-speed (at least 256 Kbit/s) data connectivity and related services over a wireless infrastructure other than mobile cellular, such as satellite or terrestrial fixed wireless broadband infrastructures.

Other fixed telecommunication services revenue, including leased lines revenue and fixed value-added telecommunication services

Revenue from leased lines refers to retail revenue received from the provision of leased lines.

Revenue from fixed value-added telecommunication services refers to the retail revenue generated by the telecommunication service sector for fixed value-added

telecommunication services, such as call forwarding, itemized billing, conference calls and voice-message services.

Value-added means additional services beyond the basic telephone service line rental and calls

Other telecommunication revenue refers to any other retail telecommunication services revenue received but not accounted for elsewhere.

## Total mobile services revenue (retail)

Revenue from mobile networks refers to retail revenue earned from the provision of mobile-cellular communication services, including all voice, SMS and data (narrowband and broadband) services offered by mobile operators offering services within the country during the financial year under review. Revenues from value added services (e.g. premium SMS) should be included. Data reported should exclude: (i) wholesale revenues (e.g. termination rates), (ii) revenues from device sales and rents, (iii) VAT and excise taxes.

Revenue from mobile voice services

Refers to all mobile-cellular retail revenue from the provision of voice services. It includes voice revenues from national and international calls but excludes revenues from roaming services.

Revenue from outbound mobile cellular roaming

Refers to all mobile-cellular retail roaming revenue from own subscribers roaming abroad. It does not cover foreign mobile subscribers roaming into the country and international calls originating or terminating on the country's mobile networks.

Revenue from mobile data services

Refers to revenue from the provision of non-voice services including messaging (other than SME and MMs), data and Internet services, including M2M/telemetry. It excludes other mobile-cellular services and wireless Internet access services not relating to mobile networks (e.g. satellite or terrestrial fixed wireless technologies).

Revenue from text and multimedia messaging services

Refers to revenue from text messaging and multimedia messaging (SMS and MMS). Some countries may account for this in different ways. For example, some mobile plans include free SMS or MMS that are liable to be classified as voice revenue rather than mobile-messaging revenue. The treatment of premium messages – where users pay an additional amount over the regular messaging rate – can vary among operators, since they typically share the revenue with a premium-service provider. Operators may also include revenue from international messaging in other categories. The preference is to include all revenue earned by the operator from the provision of messaging services to retail customers.

Other mobile services revenue

Any other mobile revenue, like banking

#### Total of any other revenue

Sum of interconnection revenue, equipment sale revenue and any other revenue

Interconnection revenues

Revenues from terminating voice and messaging traffic coming from outside the operator's own network

Equipment revenue

Revenues from equipment sales

Any other revenue

Any other revenue which could include wholesale revenues, excluding voice termination (interconnection); IT type services; revenue of a capital nature. E.g. sale of assets or a business.

#### **Telecommunications employment**

Persons employed in full-time equivalents

Persons employed in full-time equivalents refers to the total number of persons, in full-time equivalent (FTE) units, employed by telecommunication operators in the country for the provision of telecommunication services, including fixed-telephone, mobile-cellular, Internet and data services. This indicator excludes staff working in broadcasting businesses that offer only traditional broadcasting services. Part-time staff should be expressed in terms of full-time staff equivalents (FTE).

*Telecoms employment- female* 

Persons employed by all telecommunication operators; female should be expressed in terms of full-time staff equivalents.

#### **Telecommunication Subscriptions**

## Fixed-telephone subscriptions

Fixed-telephone subscriptions refers to the sum of active analogue fixed- telephone lines, voice-over-IP (VoIP) subscriptions, fixed wireless local loop (WLL) subscriptions, ISDN voice-channel equivalents and fixed public payphones. This indicator was previously called Main telephone lines in operation.

Analogue fixed-telephone lines

Analogue fixed-telephone lines refer to the number of active lines connecting subscribers' terminal equipment to the PSTN, and which have a dedicated port in the telephone-exchange equipment. It includes all post-paid lines and those prepaid lines that have registered an activity in the past three months. This term is synonymous with the terms 'main station' and 'direct exchange line' (DEL) that are commonly used in telecommunication documents.

VoIP subscriptions

VoIP subscriptions refers to the number of voice-over-Internet protocol (VoIP) fixedline subscriptions. It is also known as voice over broadband (VoB), and includes VoIP subscriptions through fixed wireless, DSL, cable, fibre optic and other fixedbroadband Internet platforms that provide fixed telephony using IP. It excludes software-based VoIP applications (e.g. VoIP with Skype using computer-to-computer or computer-to-telephone). Those VoIP subscriptions that do not imply a recurrent monthly fee should only be counted if they have generated inbound or outbound traffic within the past three months.

Fixed wireless local loop subscriptions

Fixed wireless local loop (WLL) subscriptions refers to subscriptions provided by licensed fixed-line telephone operators that provide 'last-mile' access to the subscriber using radio technology and where the subscriber's terminal equipment is either stationary or limited in its range of use.

ISDN voice-channel equivalents

ISDN voice-channel equivalents refers to the sum of basic-rate and primary-rate voice-channel equivalents (B-channel equivalents). Basic-rate voice-channel equivalents is the number of basic-rate ISDN subscriptions multiplied by 2, and

primary-rate voice-channel equivalents is the number of primary-rate ISDN subscriptions multiplied by 23 or 30, depending on the standard implemented.

Fixed public payphones

Fixed public payphones refers to payphones that are available to the public using the fixed network.

#### Mobile cellular subscriptions

Mobile-cellular telephone subscriptions, by post-paid and prepaid Mobile-cellular telephone subscriptions refers to the number of subscriptions to a public mobile-telephone service that provide access to the PSTN using cellular technology.

Prepaid mobile-cellular telephone subscriptions

Refers to the total number of mobile-cellular telephone subscriptions that use prepaid refills. These are subscriptions where, instead of paying an ongoing monthly fee, users purchase blocks of usage time. Although the definition of prepaid subscribers from the ITU definition is 3 month active subscribers (those used at least once in the last three months for making or receiving a call or carrying out a non-voice activity such as sending or reading an SMS or accessing the Internet), some South African operators do not have this metric available but rather count SIMs that have not been disconnected within a 90 day window, reporting, implying that the number may be overstated according to the strict definition. The indicator applies to all mobile-cellular subscriptions that offer voice communications. It excludes subscriptions via data cards or USB modems, subscriptions to public mobile data services, private trunked mobile radio, telepoint, radio paging and telemetry services.

Post-paid mobile-cellular telephone subscriptions

Refers to the total number of mobile-cellular subscriptions, including top up bundles, where subscribers are billed after their use of mobile services, at the end of each month. The post-paid service is provided on the basis of a prior arrangement with a mobile- cellular operator. Typically, the subscriber's contract specifies a limit or allowance of minutes, text messages, etc. The subscriber will be billed at a flat rate for any usage equal to or less than that allowance. Any usage above that limit incurs extra charges. Theoretically, a subscriber in this situation has no limit on use of mobile

services and, as a consequence, unlimited credit. M2M mobile-network subscriptions are included in post-paid subscriptions

M2M mobile-network subscriptions

M2M subscriptions is a subset of post-paid mobile cellular subscriptions and refers to the number of mobile-cellular machine- to-machine subscriptions that are assigned for use in machines and devices (cars, smart meters, consumer electronics) for the exchange of data between networked devices and are not part of a consumer subscription. For instance, SIM-cards in personal navigation devices, smart meters, trains and automobiles should be included. Mobile dongles and tablet subscriptions should be excluded.

### Internet and data subscriptions

Fixed broadband subscriptions

Fixed-broadband subscriptions refers to fixed subscriptions to high-speed access to the public Internet (a TCP/IP connection), at downstream speeds equal to, or greater than, 256 Kbit/s. This includes cable modem, DSL, fibre-to-the- home/building, other fixed (wired)-broadband subscriptions, satellite broadband and terrestrial fixed wireless broadband. This total is measured irrespective of the method of payment. It excludes subscriptions that have access to data communications (including the Internet) via mobile-cellular networks. It should include fixed WiMAX and any other fixed wireless technologies. It includes both residential subscriptions and subscriptions for organizations.

DSL Internet subscriptions

Refers to the number of Internet subscriptions using digital subscriber line (DSL) services to access the Internet, at downstream speeds greater than or equal to 256 Kbit/s. DSL is a technology for bringing high-bandwidth information to homes and small businesses over ordinary copper telephone lines. It should exclude very high-speed digital subscriber line (VDSL) subscriptions if these are provided using fibre directly to the premises.

Fibre-to-the-home/building Internet subscriptions

Refers to the number of Internet subscriptions using fibre-to-the-home or fibre-to-the-building, at downstream speeds equal to, or greater than, 256 Kbit/s. This should

include subscriptions where fibre goes directly to the subscriber's premises or fibreto-the-building subscriptions that terminate no more than 2 metres from an external wall of the building. Fibre-to-the-cabinet and fibre-to-the-node are excluded.

Other fixed (wired) broadband subscriptions

Refers to Internet subscriptions using other fixed (wired) broadband technologies to access the Internet (other than DSL, cable modem, and fibre), at downstream speeds equal to, or greater than, 256 Kbit/s. This includes technologies such as ethernet LAN, and broadband-over-powerline (BPL) communications. Ethernet LAN subscriptions refer to subscriptions using IEEE 802.3 technology. BPL subscriptions refer to subscriptions using broadband-over-powerline services. Users of temporary broadband access (e.g. roaming between PWLAN hotspots), users of WiMAX and those with Internet access via mobile-cellular networks are excluded.

Wireless broadband subscriptions

Wireless-broadband subscriptions refers to the sum of satellite broadband, terrestrial fixed wireless broadband and active mobile-broadband subscriptions to the public Internet. The indicator does not cover fixed (wired) broadband or Wi-Fi subscriptions.

Satellite broadband subscriptions

Satellite broadband subscriptions refers to the number of satellite Internet subscriptions with an advertised download speed of at least 256 Kbit/s. It refers to the retail subscription technology and not the backbone technology.

Terrestrial fixed wireless broadband subscriptions

Terrestrial fixed wireless broadband subscriptions refer to the number of terrestrial fixed wireless Internet subscriptions with an advertised download speed of at least 256 Kbit/s. This includes fixed WiMAX and fixed wireless subscriptions but excludes occasional users at hotspots and Wi-Fi hotspot subscribers. It also excludes mobile-broadband subscriptions where users can access a service throughout the country wherever coverage is available."

Mobile data subscriptions

Number of prepaid and post-paid mobile subscriptions that were used to access the Internet the last 3 months, regardless of speed.

#### Traffic

Fixed line voice traffic

*This aggregated value is the sum of Fixed line traffic (i.e. fixed-to-fixed) and all other fixed line originated traffic (Fixed to mobile and international outgoing).* 

Fixed line traffic

Refers to domestic fixed-to-fixed telephone traffic, in minutes. Domestic fixed-tofixed telephone traffic refers to completed local and domestic long-distance fixedtelephone voice traffic. The indicator should be reported as the number of minutes of traffic during the reference quarter. This excludes minutes used for dial-up Internet access.

Local fixed-to-fixed telephone traffic, in minutes

Refers to effective (completed) fixed-telephone line voice traffic exchanged within the local charging area in which the calling station is situated. This is the area within which one subscriber can call another on payment of the local charge (if applicable). This is reported in the number of minutes, which should exclude minutes used for dial-up Internet access.

Long-distance fixed-to-fixed telephone traffic, in minutes

Refers to effective (completed) fixed national long-distance telephone voice traffic exchanged with a station outside the local charging area in which the calling station is situated. This is reported as the number of minutes of traffic. It excludes local calls, calls to mobile networks, calls abroad, and calls to special service numbers such as ISPs for Internet dial-up.

*Fixed-to-mobile telephone traffic* 

Refers to total traffic from all fixed-telephone networks to all mobile-cellular networks within the country.

International incoming and outgoing fixed-telephone traffic

Refers to the sum of international incoming and outgoing fixed-telephone voice traffic.

International outgoing fixed-telephone traffic, in minutes

Refers to effective (completed) fixed-telephone voice traffic originating in a given country to destinations outside that country. This should include traffic to mobile phones outside the country. This is reported in number of minutes of traffic. It excludes calls originating in other countries. It should include VoIP traffic.

International incoming fixed-telephone traffic, in minutes

Refers to effective (completed) fixed-telephone voice traffic originating outside the country with a destination inside the country, irrespective of whether the call was from a fixed or mobile subscriber. It excludes minutes of calls terminating in other countries, but includes VoIP traffic

Mobile voice traffic

This aggregated value is the sum of Total national mobile traffic, as defined below, and international outgoing from mobile.

Total national mobile traffic

Domestic mobile-telephone traffic refers to the total number of minutes of calls made by mobile subscribers within a country (including minutes to fixed-telephone and minutes to mobile-phone subscribers).

*Outgoing mobile traffic to same mobile network* 

Refers to the number of minutes of calls made by mobile subscribers to the same mobile network (within the country). This refers to the number of minutes originating on mobile networks and terminating on the same mobile network (on-net). It does not cover minutes of calls from mobile to fixed or mobile to other mobile networks.

Mobile to other mobile networks

Outgoing mobile traffic to other mobile networks, in minutes refers to the number of minutes of calls made by mobile subscribers to other mobile networks (within the country). The indicator refers to the number of minutes originating on mobile networks and terminating on different domestic mobile networks (off-net). It does not cover minutes of calls from mobile to fixed or mobile to the same mobile networks.

Outgoing mobile traffic to fixed networks

Refers to the number of minutes of calls made from mobile-cellular networks to fixedline telephone networks within the country. The indicator refers to the number of minutes originating on mobile networks and terminating on fixed-line telephone networks within the country.

International outgoing from mobile

Outgoing mobile traffic to international refers to the number of mobile minutes originating in a country to any destinations outside that country.

Incoming international traffic to mobile network

Refers to the number of incoming minutes (fixed and mobile) received by mobile networks originating in another country.

Mobile data traffic

Mobile data traffic (within the country) refers to data traffic originated within the country from mobile networks. Download and upload traffic should be added up and reported together. Traffic should be measured at the end-user access point. Wholesale and walled-garden traffic should be excluded. The traffic should be reported in terabytes.

SMS traffic

SMS sent refers to the total number of mobile short-message service (SMS) messages sent, both to national and international destinations. This should exclude messages sent from computers to mobile handsets or to other computers.

SMS international traffic

SMS international refers to the total number of mobile short-message service (SMS) messages sent to international destinations. This should exclude messages sent from computers to mobile handsets or to other computers.

#### Population coverage

*3G population coverage* 

Percentage of the population covered by at a 3G mobile network refers to the percentage of inhabitants that are within range of a 3G mobile-cellular signal, irrespective of whether or not they are subscribers. This is calculated by dividing the number of inhabitants that are covered by a 3G mobile-cellular signal by the total population and multiplying by 100.

*4G/LTE etc. population coverage* 

Percentage of the population covered by a 4G/LTE mobile network refers to the percentage of inhabitants that are within range of a 4G/LTE mobile-cellular signal, irrespective of whether or not they are subscribers. This is calculated by dividing the

number of inhabitants that are covered by a 4G/LTE mobile-cellular signal by the total population and multiplying by 100. Note that all LTE variants are included.

## Internet bandwidth

International Internet bandwidth

International outgoing Internet bandwidth

Refers to the total outgoing used capacity of international Internet bandwidth, in Mbit/s. This is measured as the sum of outgoing (uplink) capacity of all Internet exchanges offering international bandwidth.

International incoming Internet bandwidth

Refers to the total incoming used capacity of international Internet bandwidth, in Mbit/s. This is measured as the sum of incoming (downlink) capacity of all Internet exchanges offering international bandwidth.

Smartphone subscriptions

A smartphone is a mobile phone with advanced features: it has Wi-Fi connectivity, web browsing, capabilities, a high-resolution touchscreen display and the ability to use apps. The majority use one of the following mobile operating systems: Android, Symbian, iOS, Blackberry OS and Windows Mobile.

# Fixed post-paid local telephone services prices

Installation fee for residential telephone service

Installation fee for residential telephone service refers to the one-off charge involved in applying for a basic residential post-paid fixed-telephone service. Taxes should be included. If not included, it should be specified in a note including the applicable tax rate.

Monthly subscription for residential telephone service

Monthly subscription for residential telephone service refers to the recurring fixed charge for subscribing to a residential post-paid fixed-telephone service. The charge should cover the rental of the line but not the rental of the terminal (e.g., telephone set). If the rental charge includes any allowance for free or reduced rate call units, this should be indicated in the note. Taxes should be included. If not included, it should be specified in a note including the applicable tax rate.

Price of a three-minute local call to a fixed-telephone line, peak rate

Price of a three-minute local call (peak-rate) to a fixed-telephone line refers to the price of a three-minute peak local call from a residential fixed-telephone line, including any call set-up charges, within the same exchange area using the subscriber's own terminal (i.e., not from a public telephone). Taxes should be included. If not included, it should be specified in a note including the applicable tax rate.

Price of a three-minute local call to a fixed-telephone line, off-peak rate

Price of a three-minute local call to a fixed-telephone line refers to the price of a three-minute off-peak local call from a residential fixed-telephone line, including any call set-up charges, within the same exchange area using the subscriber's own terminal (i.e., not from a public telephone). Taxes should be included. If not included, it should be specified in a note including the applicable tax rate.

Mobile-cellular prepaid prices

Mobile-cellular prepaid-price of a one-minute local call (peak, on-net)

Refers to the price per minute of a peak prepaid call from a mobile-cellular telephone with a prepaid subscription to another subscriber in the same network. Taxes should be included. If not included, it should be specified in a note including the applicable tax rate.

Mobile-cellular prepaid-price of a one-minute local call (off-peak, on-net)

Refers to the price per minute of a prepaid call from a mobile-cellular telephone with a prepaid subscription made to the same mobile-cellular network during off-peak time. Off-peak refers to the cheapest rate before mid-night. If the only off-peak period is after mid-night, the peak price should be used. Taxes should be included. If not included, it should be specified in a note including the applicable tax rate.

Mobile-cellular prepaid-price of SMS (on-net)

Mobile-cellular prepaid – price of SMS refers to the price of sending a short-message service (SMS) message from a mobile-cellular telephone with a prepaid subscription to a mobile-cellular number of the same network (on-net). Taxes should be included. If not included, it should be specified in a note including the applicable tax rate.

ICT Sector Black Economic Empowerment Measures

*Telecom's employment -Black Top Management* 

Persons employed by all telecommunication operators, Black Top Management, should be expressed in terms of full-time staff equivalents. This should include Exco and other Executives.

Procurement Spend from all suppliers

Totals spend on all goods and services procured by an Entity.

*Procurement Spend from all suppliers based on the B-BBEE Procurement Recognition Levels* 

Totals spend on all goods and services procured by an Entity based on the B-BBEE Procurement Recognition Levels.

Number of Schools connected based on obligations imposed by ICASA

Total number of Schools connected based on obligations imposed by ICASA to operators.

Total fixed line voice revenue

Sum of revenue from retail fixed-telephone services refers to revenue received for the connection (installation) of fixed-telephone services, revenue from recurring charges for subscription to the PSTN and revenue from fixed-telephone calls.

Revenue from fixed-telephone connection charges

Revenue from fixed-telephone connection charges refers to retail revenue received for connection (installation) of fixed- telephone services. This may include charges for transfer or cessation of services.

Revenue from fixed-telephone subscription charges

Revenue from fixed-telephone subscription charges refers to revenue from recurring charges for subscriptions to the PSTN, including Internet access if it cannot be separated from fixed-telephone.

Revenue from fixed-telephone calls

Revenue from fixed-telephone calls refers to retail fixed-telephone revenue received from charges for local, national long-distance and international calls.

Fixed (wired) internet revenue

Revenue from fixed (wired) Internet services refers to retail revenue received from the provision of fixed (wired) Internet services such as subscriptions, traffic and data communication. It excludes the provision of access lines used to connect to fixed (wired) Internet (such as fixed-telephone lines used to access DSL connections). This includes revenue from fixed (wired)-broadband services (previously a separate indicator under ITU code i7311\_fb, but for reporting purposes here counted together with any small residual narrowband internet revenue in a single indicator, viz. fixed wired internet).

# Other (wireless) broadband services revenue

Revenue from other wireless-broadband services refers to the retail revenue received from the provision of high-speed (at least 256 Kbit/s) data connectivity and related services over a wireless infrastructure other than mobile cellular, such as satellite or terrestrial fixed wireless broadband infrastructures.

# Other fixed telecommunication services revenue, including leased lines revenue and fixed value-added telecommunication services

Revenue from leased lines refers to retail revenue received from the provision of leased lines.

Revenue from fixed value-added telecommunication services refers to the retail revenue generated by the telecommunication service sector for fixed value-added telecommunication services, such as call forwarding, itemized billing, conference calls and voice-message services.

Value-added means additional services beyond the basic telephone service line rental and calls

Other telecommunication revenue refers to any other retail telecommunication services revenue received but not accounted for elsewhere.

# Total mobile services revenue (retail)

Revenue from mobile networks refers to retail revenue earned from the provision of mobile-cellular communication services, including all voice, SMS and data (narrowband and broadband) services offered by mobile operators offering services within the country during the financial year under review. Revenues from value added services (e.g., premium SMS) should be included. Data reported should exclude: (i) wholesale revenues (e.g., termination rates), (ii) revenues from device sales and rents, (iii) VAT and excise taxes. Revenue from mobile voice services

Refers to all mobile-cellular retail revenue from the provision of voice services. It includes voice revenues from national and international calls but excludes revenues from roaming services.

#### Revenue from outbound mobile cellular roaming

Refers to all mobile-cellular retail roaming revenue from own subscribers roaming abroad. It does not cover foreign mobile subscribers roaming into the country and international calls originating or terminating on the country's mobile networks.

Revenue from mobile data services

Refers to revenue from the provision of non-voice services including messaging (other than SME and MMs), data and Internet services, including M2M/telemetry. It excludes other mobile-cellular services and wireless Internet access services not relating to mobile networks (e.g., satellite or terrestrial fixed wireless technologies).

Revenue from text and multimedia messaging services

Refers to revenue from text messaging and multimedia messaging (SMS and MMS). Some countries may account for this in different ways. For example, some mobile plans include free SMS or MMS that are liable to be classified as voice revenue rather than mobile-messaging revenue. The treatment of premium messages – where users pay an additional amount over the regular messaging rate – can vary among operators, since they typically share the revenue with a premium-service provider. Operators may also include revenue from international messaging in other categories. The preference is to include all revenue earned by the operator from the provision of messaging services to retail customers.

Other mobile services revenue

Any other mobile revenue, like banking

#### Total of any other revenue

Sum of interconnection revenue, equipment sale revenue and any other revenue

Interconnection revenues

Revenues from terminating voice and messaging traffic coming from outside the operator's own network

Equipment revenue

Revenues from equipment sales

Any other revenue

Any other revenue which could include wholesale revenues, excluding voice termination (interconnection); IT type services; revenue of a capital nature. E.g., sale of assets or a business.

Telecommunications employment

Persons employed in full-time equivalents

Persons employed in full-time equivalents refers to the total number of persons, in full-time equivalent (FTE) units, employed by telecommunication operators in the country for the provision of telecommunication services, including fixed-telephone, mobile-cellular, Internet and data services. This indicator excludes staff working in broadcasting businesses that offer only traditional broadcasting services. Part-time staff should be expressed in terms of full-time staff equivalents (FTE).

*Telecoms employment- female* 

Persons employed by all telecommunication operators; female should be expressed in terms of full-time staff equivalents.

### **Telecommunication Subscriptions**

Fixed-telephone subscriptions

Fixed-telephone subscriptions refers to the sum of active analogue fixed- telephone lines, voice-over-IP (VoIP) subscriptions, fixed wireless local loop (WLL) subscriptions, ISDN voice-channel equivalents and fixed public payphones. This indicator was previously called Main telephone lines in operation.

Analogue fixed-telephone lines

Analogue fixed-telephone lines refer to the number of active lines connecting subscribers' terminal equipment to the PSTN and which have a dedicated port in the telephone-exchange equipment. It includes all post-paid lines and those prepaid lines that have registered an activity in the past three months. This term is synonymous with the terms 'main station' and 'direct exchange line' (DEL) that are commonly used in telecommunication documents.

VoIP subscriptions

VoIP subscriptions refers to the number of voice-over-Internet protocol (VoIP) fixedline subscriptions. It is also known as voice over broadband (VoB), and includes VoIP subscriptions through fixed wireless, DSL, cable, fibre optic and other fixedbroadband Internet platforms that provide fixed telephony using IP. It excludes software-based VoIP applications (e.g. VoIP with Skype using computer-tocomputer or computer-to-telephone). Those VoIP subscriptions that do not imply a recurrent monthly fee should only be counted if they have generated inbound or outbound traffic within the past three months.

Fixed wireless local loop subscriptions

Fixed wireless local loop (WLL) subscriptions refers to subscriptions provided by licensed fixed-line telephone operators that provide 'last-mile' access to the subscriber using radio technology and where the subscriber's terminal equipment is either stationary or limited in its range of use.

ISDN voice-channel equivalents

ISDN voice-channel equivalents refers to the sum of basic-rate and primary-rate voice-channel equivalents (B-channel equivalents). Basic-rate voice-channel equivalents is the number of basic-rate ISDN subscriptions multiplied by 2, and primary-rate voice-channel equivalents is the number of primary-rate ISDN subscriptions multiplied by 23 or 30, depending on the standard implemented.

Fixed public payphones

Fixed public payphones refers to payphones that are available to the public using the fixed network.

### Mobile cellular subscriptions

Mobile-cellular telephone subscriptions, by post-paid and prepaid Mobile-cellular telephone subscriptions refers to the number of subscriptions to a public mobile-telephone service that provide access to the PSTN using cellular technology.

Prepaid mobile-cellular telephone subscriptions

Refers to the total number of mobile-cellular telephone subscriptions that use prepaid refills. These are subscriptions where, instead of paying an ongoing monthly fee, users purchase blocks of usage time. Although the definition of prepaid subscribers from the ITU definition is 3 month active subscribers (those used at least once in the last three months for making or receiving a call or carrying out a non-voice activity such as sending or reading an SMS or accessing the Internet), some South African operators do not have this metric available but rather count SIMs that have not been disconnected within a 90 day window, reporting, implying that the number may be overstated according to the strict definition. The indicator applies to all mobile-cellular subscriptions that offer voice communications. It excludes subscriptions via data cards or USB modems, subscriptions to public mobile data services, private trunked mobile radio, telepoint, radio paging and telemetry services.

Post-paid mobile-cellular telephone subscriptions

Refers to the total number of mobile-cellular subscriptions, including top up bundles, where subscribers are billed after their use of mobile services, at the end of each month. The post-paid service is provided on the basis of a prior arrangement with a mobile- cellular operator. Typically, the subscriber's contract specifies a limit or allowance of minutes, text messages, etc. The subscriber will be billed at a flat rate for any usage equal to or less than that allowance. Any usage above that limit incurs extra charges. Theoretically, a subscriber in this situation has no limit on use of mobile services and, as a consequence, unlimited credit. M2M mobile-network subscriptions are included in post-paid subscriptions

M2M mobile-network subscriptions

M2M subscriptions is a subset of post-paid mobile cellular subscriptions and refers to the number of mobile-cellular machine- to-machine subscriptions that are assigned for use in machines and devices (cars, smart meters, consumer electronics) for the exchange of data between networked devices and are not part of a consumer subscription. For instance, SIM-cards in personal navigation devices, smart meters, trains and automobiles should be included. Mobile dongles and tablet subscriptions should be excluded.

Internet and data subscriptions

Fixed broadband subscriptions

Fixed-broadband subscriptions refers to fixed subscriptions to high-speed access to the public Internet (a TCP/IP connection), at downstream speeds equal to, or

greater than, 256 Kbit/s. This includes cable modem, DSL, fibre-to-thehome/building, other fixed (wired)-broadband subscriptions, satellite broadband and terrestrial fixed wireless broadband. This total is measured irrespective of the method of payment. It excludes subscriptions that have access to data communications (including the Internet) via mobile-cellular networks. It should include fixed WiMAX and any other fixed wireless technologies. It includes both residential subscriptions and subscriptions for organizations.

DSL Internet subscriptions

Refers to the number of Internet subscriptions using digital subscriber line (DSL) services to access the Internet, at downstream speeds greater than or equal to 256 Kbit/s. DSL is a technology for bringing high-bandwidth information to homes and small businesses over ordinary copper telephone lines. It should exclude very high-speed digital subscriber line (VDSL) subscriptions if these are provided using fibre directly to the premises.

*Fibre-to-the-home/building Internet subscriptions* 

Refers to the number of Internet subscriptions using fibre-to-the-home or fibre-tothe-building, at downstream speeds equal to, or greater than, 256 Kbit/s. This should include subscriptions where fibre goes directly to the subscriber's premises or fibre-to-the-building subscriptions that terminate no more than 2 metres from an external wall of the building. Fibre-to-the-cabinet and fibre-to-the-node are excluded.

Other fixed (wired) broadband subscriptions

Refers to Internet subscriptions using other fixed (wired) broadband technologies to access the Internet (other than DSL, cable modem, and fibre), at downstream speeds equal to, or greater than, 256 Kbit/s. This includes technologies such as ethernet LAN, and broadband-over-powerline (BPL) communications. Ethernet LAN subscriptions refer to subscriptions using IEEE 802.3 technology. BPL subscriptions refer to subscriptions using broadband-over-powerline services. Users of temporary broadband access (e.g. roaming between PWLAN hotspots), users of WiMAX and those with Internet access via mobile-cellular networks are excluded.

Wireless broadband subscriptions

Wireless-broadband subscriptions refers to the sum of satellite broadband, terrestrial fixed wireless broadband and active mobile-broadband subscriptions to the public Internet. The indicator does not cover fixed (wired) broadband or Wi-Fi subscriptions.

Satellite broadband subscriptions

Satellite broadband subscriptions refers to the number of satellite Internet subscriptions with an advertised download speed of at least 256 Kbit/s. It refers to the retail subscription technology and not the backbone technology.

Terrestrial fixed wireless broadband subscriptions

Terrestrial fixed wireless broadband subscriptions refer to the number of terrestrial fixed wireless Internet subscriptions with an advertised download speed of at least 256 Kbit/s. This includes fixed WiMAX and fixed wireless subscriptions but excludes occasional users at hotspots and Wi-Fi hotspot subscribers. It also excludes mobile-broadband subscriptions where users can access a service throughout the country wherever coverage is available."

Mobile data subscriptions

Number of prepaid and post-paid mobile subscriptions that were used to access the Internet the last 3 months, regardless of speed.

### Traffic

Fixed line voice traffic

This aggregated value is the sum of Fixed line traffic (i.e. fixed-to-fixed) and all other fixed line originated traffic (Fixed to mobile and international outgoing).

Fixed line traffic

Refers to domestic fixed-to-fixed telephone traffic, in minutes. Domestic fixed-tofixed telephone traffic refers to completed local and domestic long-distance fixedtelephone voice traffic. The indicator should be reported as the number of minutes of traffic during the reference quarter. This exclude minutes used for dial-up Internet access.

Local fixed-to-fixed telephone traffic, in minutes

Refers to effective (completed) fixed-telephone line voice traffic exchanged within the local charging area in which the calling station is situated. This is the area within which one subscriber can call another on payment of the local charge (if applicable). This is reported in the number of minutes, which should exclude minutes used for dial-up Internet access.

Long-distance fixed-to-fixed telephone traffic, in minutes

Refers to effective (completed) fixed national long-distance telephone voice traffic exchanged with a station outside the local charging area in which the calling station is situated. This is reported as the number of minutes of traffic. It excludes local calls, calls to mobile networks, calls abroad, and calls to special service numbers such as ISPs for Internet dial-up.

*Fixed-to-mobile telephone traffic* 

Refers to total traffic from all fixed-telephone networks to all mobile-cellular networks within the country.

International incoming and outgoing fixed-telephone traffic

Refers to the sum of international incoming and outgoing fixed-telephone voice traffic.

International outgoing fixed-telephone traffic, in minutes

Refers to effective (completed) fixed-telephone voice traffic originating in a given country to destinations outside that country. This should include traffic to mobile phones outside the country. This is reported in number of minutes of traffic. It excludes calls originating in other countries. It should include VoIP traffic.

International incoming fixed-telephone traffic, in minutes

Refers to effective (completed) fixed-telephone voice traffic originating outside the country with a destination inside the country, irrespective of whether the call was from a fixed or mobile subscriber. It excludes minutes of calls terminating in other countries, but includes VoIP traffic

Mobile voice traffic

This aggregated value is the sum of Total national mobile traffic, as defined below, and international outgoing from mobile.

Total national mobile traffic

Domestic mobile-telephone traffic refers to the total number of minutes of calls made by mobile subscribers within a country (including minutes to fixed-telephone and minutes to mobile-phone subscribers).

Outgoing mobile traffic to same mobile network

Refers to the number of minutes of calls made by mobile subscribers to the same mobile network (within the country). This refers to the number of minutes originating on mobile networks and terminating on the same mobile network (onnet). It does not cover minutes of calls from mobile to fixed or mobile to other mobile networks.

Mobile to other mobile networks

Outgoing mobile traffic to other mobile networks, in minutes refers to the number of minutes of calls made by mobile subscribers to other mobile networks (within the country). The indicator refers to the number of minutes originating on mobile networks and terminating on different domestic mobile networks (off-net). It does not cover minutes of calls from mobile to fixed or mobile to the same mobile networks.

Outgoing mobile traffic to fixed networks

Refers to the number of minutes of calls made from mobile-cellular networks to fixed-line telephone networks within the country. The indicator refers to the number of minutes originating on mobile networks and terminating on fixed-line telephone networks within the country.

International outgoing from mobile

Outgoing mobile traffic to international refers to the number of mobile minutes originating in a country to any destinations outside that country.

Incoming international traffic to mobile network

Refers to the number of incoming minutes (fixed and mobile) received by mobile networks originating in another country.

Mobile data traffic

Mobile data traffic (within the country) refers to data traffic originated within the country from mobile networks. Download and upload traffic should be added up and reported together. Traffic should be measured at the end-user access point.

Wholesale and walled-garden traffic should be excluded. The traffic should be reported in terabytes.

#### Population coverage

*3G population coverage* 

Percentage of the population covered by at a 3G mobile network refers to the percentage of inhabitants that are within range of a 3G mobile-cellular signal, irrespective of whether or not they are subscribers. This is calculated by dividing the number of inhabitants that are covered by a 3G mobile-cellular signal by the total population and multiplying by 100.

*4G/LTE etc. population coverage* 

Percentage of the population covered by a 4G/LTE mobile network refers to the percentage of inhabitants that are within range of a 4G/LTE mobile-cellular signal, irrespective of whether or not they are subscribers. This is calculated by dividing the number of inhabitants that are covered by a 4G/LTE mobile-cellular signal by the total population and multiplying by 100. Note that all LTE variants are included.

#### Internet bandwidth

International Internet bandwidth

International outgoing Internet bandwidth

Refers to the total outgoing used capacity of international Internet bandwidth, in Mbit/s. This is measured as the sum of outgoing (uplink) capacity of all Internet exchanges offering international bandwidth.

International incoming Internet bandwidth

Refers to the total incoming used capacity of international Internet bandwidth, in Mbit/s. This is measured as the sum of incoming (downlink) capacity of all Internet exchanges offering international bandwidth.

BRICS

the acronym coined for an association of five major emerging national economies: Brazil, Russia, India, China, and South Africa

Virtual post users

Is a digital mailbox post service that you access via any computer, tablet, or smartphone. Receive, forward, pick up, shred, or discard mail and packages. It allows you to manage your postal mail and packages with our smartphone app or online anytime, from anywhere

#### Appendix 3: Aggregated data from ICASA questionnaires

The table below lists the aggregated figures from the three ICASA questionnaires to the electronic communications licensees, the TV broadcasting licensees, and the postal services operators, for the period of 1 October 2020 -30<sup>th</sup> September 2021. For definitions, please refer to the Appendix 2 above, and for more clarification please refer to the notes accompanying the associated figures in the report.

# Telecommunication data used

Total revenue	R200 250 923 462
Total fixed line revenue	R6 516 442 350
Revenue from retail fixed-telephone services	R95 488 163
Revenue from fixed-telephone subscription charges	R3 517 593 998
Revenue from fixed-telephone calls	R2 903 360 189
Total Fixed Internet and data revenue	R23 493 901 812
Fixed Internet revenue (R)	R4 737 468 356
Revenue from fixed (wired)-broadband services	R13 262 951 804
Other wireless-broadband services revenue	R1 297 502 236
Other telecommunication services revenue, including leased lines revenue and fixed value-added telecommunication services	R4 195 979 416
Total mobile services revenue (Rm)	R113 945 854 241
Revenue from voice services	R36 101 920 184
Revenue from outbound roaming (R)	R2 815 175 130
Revenue from mobile data services	R53 128 234 464
Revenue from text and multimedia messaging services	R3 644 150 398
Prepaid revenue mobile voice	R27 579 347 445
Prepaid revenue mobile data	R31 157 104 593
Prepaid revenue mobile messaging	R877 342 773
Other mobile services revenue	R18 256 374 065
Other mobile services revenue Total of any other revenue	R18 256 374 065 R56 294 725 060

Equipment revenue	R28 151 015 752
Any other revenue	R22 909 611 366
Total telecommunication investment	R33 969 436 538
Annual investment in fixed-telephone services	R78 140 318
Annual investment in fixed (wired)-broadband services	R3 880 738 778
Annual investment in mobile communication services	R17 251 321 589
Infrastructure	R8 493 709 643
Expansion	R1 124 581 032
Maintenance	R1 124 581 032
Other annual investment in telecommunication services	R2 016 364 145
Fixed line subscriptions	1 461 046
Analogue fixed-telephone lines	749 269
VoIP subscriptions	342 474
Fixed wireless local loop subscriptions	254
ISDN voice-channel equivalents	366 889
Fixed public payphone	2 160
Mobile cellular subscriptions	103 167 525
Prepaid mobile-cellular telephone subscriptions	86 816 228
Postpaid mobile-cellular telephone subscriptions	16 351 297
Mobile Cellular Active Subscriptions (Active for more than 90 Days)	55 174 185
M2M mobile-network subscriptions	9 371 388
Fixed broadband subscriptions	1 796 364
DSL Internet subscriptions	316 825
Fibre-to-the-home/building Internet subscriptions	1 379 207
Other fixed (wired)-broadband subscriptions	100 332
Fiber subscriptions	700 409
Rural Fiber subscriptions	6 298
Urban Fiber subscriptions	694 111
OTT consumers users	-
Wireless-broadband subscriptions	191 827
Satellite broadband subscriptions	5 062
Terrestrial fixed wireless broadband subscriptions	186765
Mobile data users	40597386
Fixed line traffic	3 398 520 058
Local fixed-to-fixed telephone traffic, in minutes	1 869 197 103
Long-distance fixed-to-fixed telephone traffic, in minutes	1 529 322 955

Fixed-to-mobile telephone traffic	5 912 533 086	
International incoming and outgoing fixed-telephone traffic	322 602 509	
International outgoing fixed-telephone traffic, in minutes	233 434 942	
International incoming fixed-telephone traffic, in minutes	89 167 567	
Total national mobile traffic	101 149 515 339	
Outgoing mobile traffic to same mobile network	75 931 467 737	
Mobile to other mobile networks	22 530 502 389	
Mobile to fixed	2 687 545 213	
Mobile data traffic	18 832 911	
International Internet bandwidth (Mbps) capacity	6 545 142	
International outgoing Internet bandwidth	5 597 822	
International incoming Internet bandwidth	947 320	
Smartphone subscriptions	65 313 134	
Smartphone subscriptions	65 313 134	
Telecommunication employment -Total	22 055	
Telecommunication employment- female	8 603	
Telecommunication employment- Disabled	191	
Telecommunication employment- Unskilled	831	
Telecommunication employment- Semi skilled	4 530	
Telecommunication employment- skilled	12 270	
Telecom's employment- Top Management (EXCO Members)	257	
Telecom's employment- Black Top Management (EXCO Members)	104	
Telecom's employment- Black Top Female Management (EXCO Members)	48	
Procurement Spend from all suppliers	R124 166 572 439	
Procurement Spend from all suppliers based on the B-BBEE Procurement Recognition Levels	R105 744 926 535	
Number of Schools connected based on obligations imposed by ICASA	6 085	
Broadcasting data used		
Total revenue	R36 798 752 670	
Broadcasting Advertising Revenue	R5 050 590 836	
Broadcasting Subscriptions Revenue	R28 372 345 149	
Revenue from Broadcasting Promotions (with flighting code).	R1 569 936 033	
Revenue from sponsorships	R642772173	

Revenue from Government or State grant

R87 169 736
Revenue from donations	R11551610
Revenue from infomercials	R12 240 565
Revenue from membership fees	R4 261 493
Total of any other revenue	R1 047 885 075
Itemised expenditure	R14 436 900 709
Programme expenditure	R14 436 900 709
Subscription and take-up of services	
Subscriber and registered viewership numbers	8 671 839
Number of Pay TV subscribers	8 300 403
Number of registered non-Pay TV viewers	371 436
ICT Sector Economic Empowerment Measures	
Broadcasting employment - Total	3 444
Broadcasting employment- female	1 760
Broadcasting employment- Disabled	91
Broadcasting employment- Unskilled	63
Broadcasting employment- Semi skilled	467
Broadcasting employment- skilled	2 048
Broadcasting employment - Top Management (EXCO members)	88
Broadcasting employment- Black Top Management (EXCO members)	56
Broadcasting employment- Black Top Female Management (EXCO members)	32
Procurement Spend from all suppliers	R2 831 020 620
Procurement Spend from all suppliers based on the B-BBEE Procurement Recognition Levels	R2 037 867 747
Total Number of Television (stations and distributors)	20 520 479
Number of Digital Satellite Stations	53
Number of Digital Terrestrial Stations	86
Number of Analogue Terrestrial Stations	6
Number of Signal Distributors	10
Number of set-top boxes	20 520 177
Number of Content Distributors	147
Investment	R38913937
Infrastructure	R11275051
Expansion	R2 450 000
Maintenance	R10 686 665
Others	R14 502 220

Total Number of Local independent productions	5 279	
Total Number of international independent productions	115	
Total Number of productions by the broadcasters	8 066	
Total expenditure on Local independent productions (In Rand)	R1 988 857 418	
Total expenditure on international independent productions (In Rand)	R708 876 535	
Total expenditure on broadcaster productions (In Rand)	R476 753 738	
Postal services data used		
Total SAPO revenue	R6 608 094 913	
Postbank interest revenue	R144 000	
Retail products revenue	R868 000	
Services rendered - Postal	R1 520 830 000	
Services rendered - Agency and money transfer	R1 351 951 000	
Services rendered - Courier	R2 074 432 835	
Balancing figure below		
Total of any other revenue	R1 659 858 078	
Other information		
Points of presence	3 174	
Postal employment -Total	18 363	
Postal employment- female	8 502	
Postal employment- Disabled	38	
Postal employment- Unskilled	823	
Postal employment- Semi skilled	13 167	
Postal employment- skilled	3 653	
Postal employment- Top Management (EXCO members)	31	
Postal employment- Black Top Management (EXCO members)	14	
Postal employment- Black Top Female Management (EXCO members)	5	
Procurement Spend from all suppliers	R288 366 514	
Procurement Spend from all suppliers based on the B-BBEE Procurement Recognition Levels	R44 550 384	
Letter delivery services (Registered letters)	331 268 861	
Letters: Domestic service and international outbound (International Mail Centre Volumes)	4 940 742	
Letters: Domestic service and international outbound (Local Volumes)	326 328 119	
Parcel delivery services	8 126 907	
Parcel: Domestic service and international outbound (International Mail Centre Volumes)	50 087	

Parcel: Domestic service and international outbound (Local Volumes)	8 076 820
Number of PO Boxes	4 642 638
Number of PO Boxes rented	3 333 402
Number of physical addresses in database	16 824 061
Investment	R167 312 606
Infrastructure	R151680331
Expansion	RO
Maintenance	R15632276
Others	RO

Source: ICASA Telecommunications, TV Broadcasting and Postal Questionnaires, January 2022.