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The State of the ICT Sector Report of South Africa

March 2026

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Executive Summary

The Independent Communications Authority of South Africa ("ICASA / the Authority") is pleased to release the 11th annual State of Information, Communications and Technology ("ICT") sector report.

The report demonstrates the Authority's commitment to expanding access to ICT by systematically compiling comprehensive and timely sector indicators to support effective regulation of the broadcasting, postal services, and telecommunications industries in South Africa. These indicators provide critical benchmarks for policy analysis and regulatory oversight, while also promoting alignment with international standards and comparative data from peer regulatory bodies. The report is informed by the following data sources:

- Statistics South Africa's ("Stats SA") General Household Survey ("GHS") 2024 report.
- International Telecommunication Union's ("ITU") 2024 and 2025 reports
- The State of the ICT Questionnaire, data collected through detailed questionnaires distributed to licensees by the Authority, covering the period from 01 October 2024 to 30 September 2025.
- OOKLA Speedtest Global Index 2026 Report.

The Authority received a total of one hundred and three (103) responses from the Electronic Communications Service ("ECS") and Electronic Communications Network Service ("ECNS") licensees, forty-eight (48) responses from television and radio broadcasters and, only seven (7) responses from postal sector operators. All the major operators have responded to the questionnaire.

Sector performance.

South Africa's ICT sector continues to undergo a structural transition driven by OTT platforms that reshape demand, competition, pricing, and revenue models across telecommunications, broadcasting, and postal services. OTT communication services substitute for legacy voice/SMS while increasing reliance on data, reflected in shrinking mobile voice revenues and rising fixed and mobile data consumption. Streaming video platforms and digital advertisers fragment broadcasting audiences and shift revenue away from linear TV. Postal revenues continue to decline due to digital substitution, while OTT enabled e-commerce increases parcel volumes and raises logistics expectations. These dynamics underscore the need for modernised, technology-neutral regulation that balances fair competition, investment sustainability, consumer protection, and digital inclusion.

South Africa's ICT sector recorded modest aggregate growth of 0.8% in 2025, driven solely by the telecommunications segment. Telecommunications revenue increased by 1.6%, while broadcasting and postal revenues declined by 4.6% and 2.3% respectively. The five-year CAGR of 3.0% masks these divergent paths: telecommunications continue expanding on the strength of broadband and data services, whereas broadcasting and postal services remain under structural pressure from digital migration and electronic substitution.

Access & coverage.

Population coverage reached 99.5% for 4G/LTE and 58.0% for 5G in 2025. Rural 5G availability lags, particularly in sparsely populated provinces. Stats SA indicates 82.1% of households had internet access from any location in 2024 but fixed at-home access remains comparatively low with wide provincial disparities; the Western Cape leads fixed adoption.

Affordability & prices.

South Africa's mobile broadband remains affordable, with the 2GB basket at R152. comfortably below the 2% GNI benchmark. In contrast, entry-level fixed broadband remains unaffordable at R309, well above the target, highlighting structural cost pressures in the fixed market. Regional comparisons show South Africa performing better than most SADC countries, though still far behind affordability leaders such as Seychelles and Mauritius. Within BRICS, South Africa is competitive on mobile but ranks among the least affordable for fixed broadband, underscoring the need to prioritise wholesale and infrastructure reforms to close the fixed-broadband affordability gap.

Investment & resilience.

Total telecommunications investment declined 2.3% year-on-year, reflecting a pivot toward fixed networks (fixed/wired +11.9%; mobile –21.0%). Theft-related costs rose 189% and sustained spend on batteries and generators indicates elevated resilience costs due to power disruptions; vandalism decreased 34%, suggesting some mitigation gains. Coordinated critical-infrastructure protection and energy resilience measures remain essential to safeguard service continuity.

Usage & traffic.

Mobile traffic increased substantially in 2025, with national mobile minutes rising by 21.5%, even as mobile services revenue declined by 7.9%. This reflects price competition, OTT substitution and shifting usage behaviour. While total SIMs grew slightly (0.4%), active subscriptions (>90 days) fell by 2.8%, indicating a maturing market with uneven engagement across user groups. Fixed broadband particularly fibre continued strong expansion (+19.3%), reinforcing the long-term shift toward data-centric connectivity.

Employment & transformation.

Total employment across the three sectors declined by 5.2% in 2025, driven by a steep 21.2% contraction in postal employment and a 2.3% decline in telecommunications. Broadcasting diverged from this trend, recording a 13.1% increase in employment, reflecting expanded content production and digital operations. Leadership diversity trends were mixed: telecommunications reported significant declines in top management representation for Black and female executives, while broadcasting showed improvement. Postal EXCO representation remained static.

Universal access.

Of 21,878 government facilities identified under spectrum licensing obligations, 4,377 (≈20%) were connected as of October 2025; accelerating this programme is pivotal for schools, health facilities, libraries and traditional authorities. Strengthening monitoring, enforcement and incentive structures can help close the remaining 80% gap.

Broadcasting – Revenue declined 4.6% year-on-year as audiences and advertising continue to shift to on-demand; however, programme expenditure increased 7.6% to approximately R17.2bn and broadcaster-led productions rose. Pay-TV subscribers fell 9.6% to approximately 6.7m. Local independent production spend reached approximately R1.20bn, while employment increased 13.1% and B-BBEE-recognised procurement measured 68.8%.

Postal – Registered letter volumes declined in 2025, with total volumes falling from 152.96 million in 2024 to 148.04 million. Local domestic letters continue to drop due to digital substitution, while International Mail Centre volumes increased only slightly (5.31 million → 5.37 million), indicating stable but modest international processing activity.

Based on the data in the report: Key actions.

1) **Affordability:** reduce entry-level fixed costs through wholesale reforms and infrastructure sharing;

2) **OTT:** Initiate a comprehensive market enquiry into OTT communication and streaming services to assess their competitive impact on the ICT sector;

3) **Coverage:** target rural 4G with obligations-linked incentives and streamlined wayleaves;

4) **Resilience:** protect assets against theft and support efficient backup solutions;

5) **Public facilities:** transparent tracking and enforcement to accelerate connections.

1 Introduction

The State of the ICT report presents a comprehensive assessment of performance trends and structural developments across South Africa's telecommunications, broadcasting, and postal services sectors. As the statutory regulator, ICASA continues to oversee these industries in the public interest, promoting sustainable growth, competition, and regulatory compliance. This report delivers in-depth analysis and key insights across critical dimensions, including financial performance, employment patterns, infrastructure investment, service adoption, and subscription dynamics. Through this evidence-based approach, the report offers a clear and authoritative view of the sector's evolution and the regulatory landscape shaping its trajectory.

The report further strengthens ICASA's commitment to providing timely, accurate, and policy-relevant information to support informed decision-making by stakeholders. By highlighting emerging trends, technological advancements, and regulatory developments, the report serves as a strategic resource for industry participants, policymakers, investors, and researchers. It equips stakeholders with the intelligence required to respond to market shifts, manage regulatory obligations, and leverage growth opportunities, thereby contributing to a resilient, inclusive, and forward-looking ICT ecosystem in South Africa.

ICASA Mandate

ICASA is an independent regulatory body and derives its mandate from the Constitution of the Republic of South Africa, 1996 ("Constitution"), the Independent Communications Authority of South Africa, 2000 (Act No. 13 of 2000) ("ICASA Act"), the Broadcasting Act, 1999 (Act No. 4 of 1999) ("Broadcasting Act"), the Electronic Communications Act, 2005 (Act No. 36 of 2005) ("ECA"), and the Postal Services Act, 1998 (Act No. 124 of 1998) ("Postal Act").

In fulfilling its mandate, the Authority collects and analyses statistical information on the ICT sector to monitor performance, produce authoritative reports, and ensure that policy and regulatory decisions are informed by accurate, evidence-based data. This critical function strengthens governance and enables the proactive identification of emerging trends and sector-wide challenges.

ICASA is also tasked with ensuring that all South Africans have access to affordable and high-quality ICT services. This responsibility involves promoting universal service access, fostering competition among service providers, and encouraging innovation to improve service delivery. By prioritizing inclusivity and affordability, ICASA aims to bridge the digital divide and contribute to a more connected and economically empowered society. Through its regulatory efforts, ICASA strives to create a balanced and progressive ICT landscape that benefits all stakeholders.

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 as required by the Authority at any given time. The Authority makes use of questionnaires as a primary data collection tool where telecommunications, broadcasting and postal service operators submit information on ICT indicators. The questionnaires are customized for ECS, ECNS, Television and Radio Broadcasters, and Postal service operators. The questionnaires cover data over a 12-month period ending on 30 September of 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 the 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:

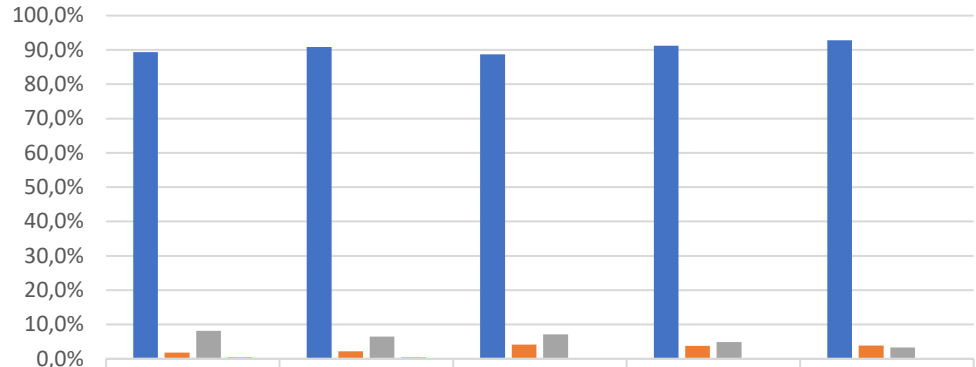
Section 1 details the introduction, ICASA mandate, methodology, and limitations of the report.
Section 2 presents information collected by Stats SA, including ICT information from the General Household Survey report.
Section 3 looks at the comprehensive ICT information collected by the Authority. The information is broken down into three segments, namely, revenue, Procurement and employment for the three sectors holistically and presented in each sector.
Section 4 looks at the Telecommunications sector.
Section 5 covers the Broadcasting sector.
Section 6 covers the Postal Services Sector.
Section 7 provides a conclusion of the full report with key takeaways on the overall results and performance of the ICT sector.

2 The ICT Sector Information as Reported by Statistics South Africa

The State of the ICT Sector Report of South Africa is released annually on or before 31st March, one year ahead of Statistics South Africa's General Household Survey (GHS) report.

The GHS report shows trends in household with access to mobile and landline voice communication services in South Africa between 2020 and 2024. Households with only landlines remained very low and stable at 0.1% from 2022 to 2024. The share of households without any phone (neither cell phone nor landline) rose slightly from 3.8% in 2022 to 3.9% in 2024. Households with both a cellular phone and a landline declined from 4.9% in 2023 to 3.3% in 2024. Meanwhile, households with only a cellular phone increased from 91.2% in 2023 to 92.8% in 2024.

Graph 1: Proportion of households who have a functional landline and/or cellular telephone in the Republic of South Africa from 2020 to 2024.

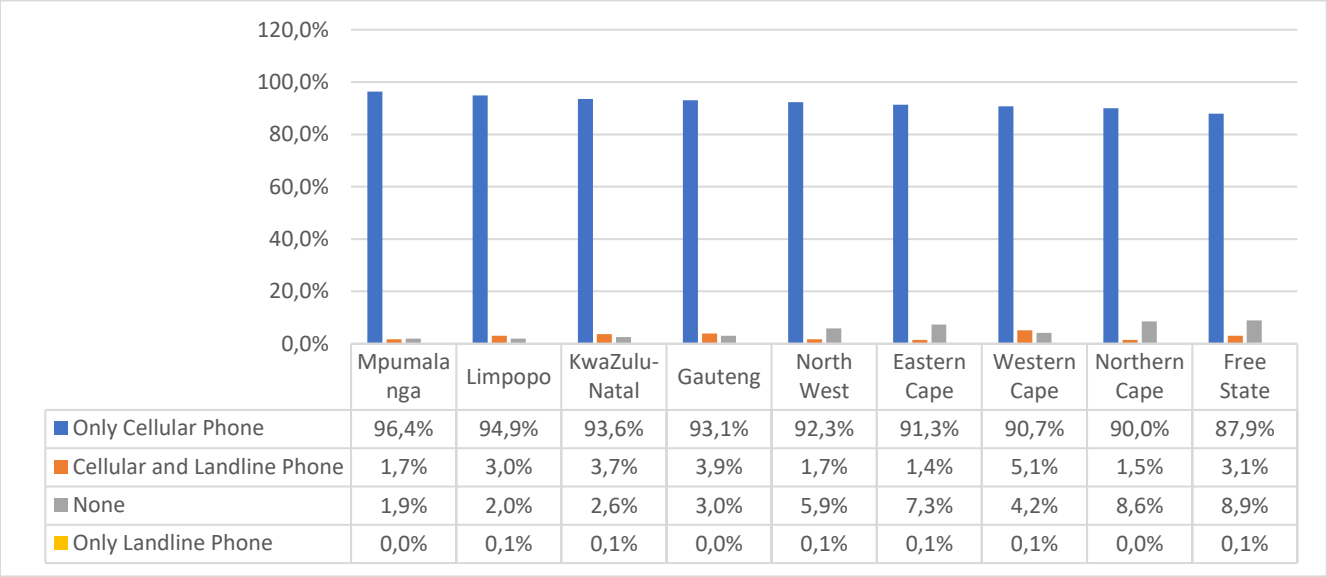


	2020	2021	2022	2023	2024
Only Cellular Phone	89,4%	90,8%	88,7%	91,2%	92,8%
None	1,8%	2,2%	4,1%	3,8%	3,9%
Cellular and Landline Phone	8,2%	6,5%	7,1%	4,9%	3,3%
Only Landline Phone	0,5%	0,5%	0,1%	0,1%	0,1%

Source: StatsSA GHS, 2020 – 2024.

According to the GHS report, in 2024, Mpumalanga had the highest proportion of households using only mobile phones, at 96.4%, followed by Limpopo at 94.9%. In contrast, Free State had the lowest proportion, at 87.9%. Regarding households with no access to either a mobile phone or a landline, Free State had the highest percentage at 8.9%, while Mpumalanga had the lowest at 1.9%. In the same year, households with only landline phones were found in Limpopo, KwaZulu-Natal, North West, Eastern Cape, Free State, and Western Cape, each accounting for 0.1%.

Graph 2: Percentage of Households who have functional landline and cellular telephone in their dwellings by province for 2024.

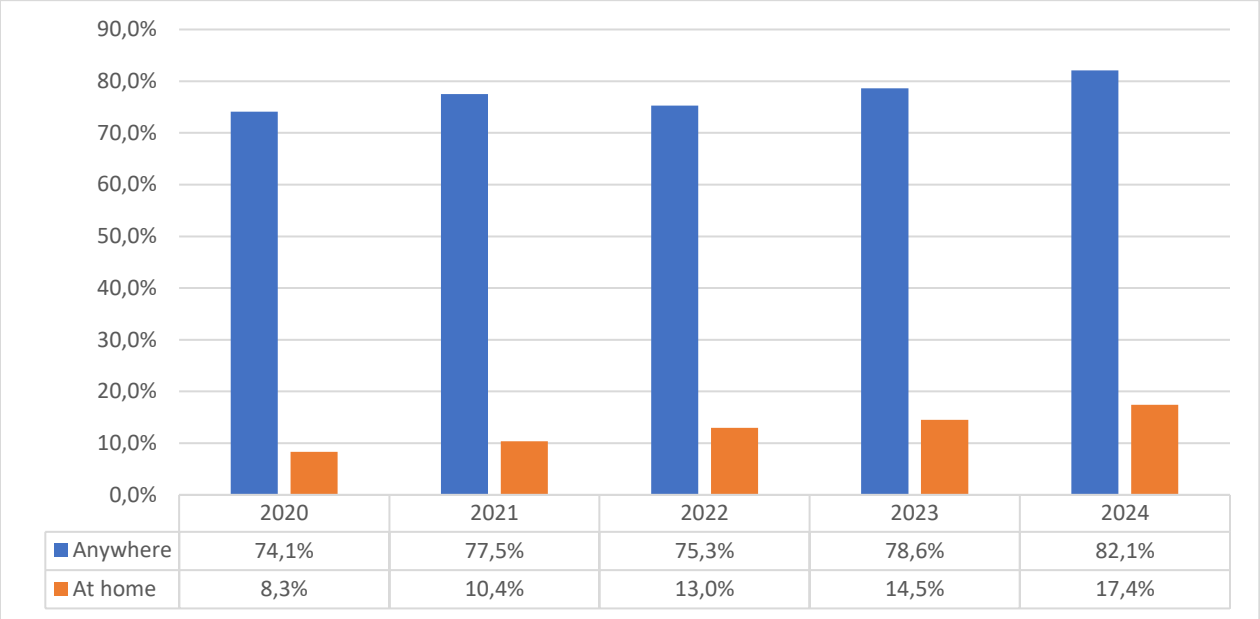


	Mpumalanga	Limpopo	KwaZulu-Natal	Gauteng	North West	Eastern Cape	Western Cape	Northern Cape	Free State
Only Cellular Phone	96,4%	94,9%	93,6%	93,1%	92,3%	91,3%	90,7%	90,0%	87,9%
Cellular and Landline Phone	1,7%	3,0%	3,7%	3,9%	1,7%	1,4%	5,1%	1,5%	3,1%
None	1,9%	2,0%	2,6%	3,0%	5,9%	7,3%	4,2%	8,6%	8,9%
Only Landline Phone	0,0%	0,1%	0,1%	0,0%	0,1%	0,1%	0,1%	0,0%	0,1%

Source: StatsSA GHS, 2024.

According to the GHS, the proportion of households with access to the internet from any location showed a noticeable increase, rising from 78.6% in 2023 to 82.1% in 2024. This indicates a growing trend in digital connectivity across the country. Furthermore, the percentage of households with internet access specifically at home also experienced a slight but positive increase, moving from 14.5% in 2023 to 17.4% in 2024. These figures reflect gradual improvements in household internet availability, suggesting that more families are gaining access to online resources, information, and digital services than in previous years.

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 nationally in 2024.

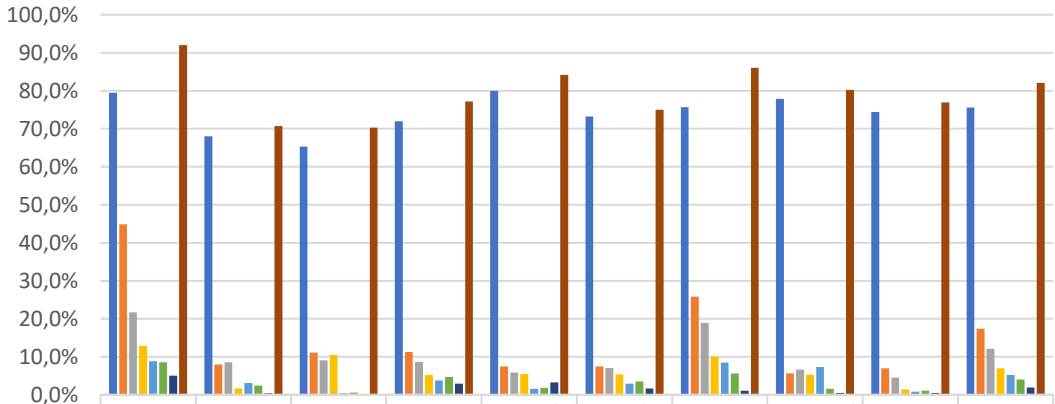


	2020	2021	2022	2023	2024
Anywhere	74,1%	77,5%	75,3%	78,6%	82,1%
At home	8,3%	10,4%	13,0%	14,5%	17,4%

Source: StatsSA GHS, 2020 – 2024.

The 2024 data on internet access across South African provinces shows a clear dominance of mobile connectivity, with KwaZulu-Natal leading at 80% and the Eastern Cape lowest at 65.3%, while the national average sits at 75.6%. In contrast, fixed internet access, particularly Fixed internet at home, remains limited but growing. The Western Cape leads in Fixed internet adoption at 44.9%, reflecting stronger infrastructure and urban connectivity, whereas Mpumalanga lags at just 5.6%. Nationally, only 17.4% of households have fixed connections. This highlights a significant digital divide, emphasizing the need for expanded Fixed internet networks to ensure reliable, high-speed internet access.

Graph 4: Percentage (%) distribution of households with access to the Internet by province and type of internet access, 2024.



	Western Cape	Eastern Cape	Northern Cape	Free State	KwaZulu-Natal	North West	Gauteng	Mpumalanga	Limpopo	National
Mobile	79,5%	68,0%	65,3%	72,0%	80,0%	73,2%	75,7%	77,9%	74,4%	75,6%
Fixed internet at home	44,9%	8,0%	11,1%	11,3%	7,5%	7,5%	25,8%	5,6%	7,0%	17,4%
Internet at work	21,7%	8,6%	9,1%	8,7%	5,9%	7,1%	18,9%	6,6%	4,5%	12,1%
Public Wi-Fi	12,9%	1,7%	10,5%	5,2%	5,5%	5,4%	10,0%	5,3%	1,4%	7,0%
Internet Café	8,8%	3,1%	0,4%	3,8%	1,6%	2,9%	8,5%	7,3%	0,8%	5,2%
At educational facility	8,6%	2,4%	0,6%	4,7%	1,8%	3,5%	5,6%	1,6%	1,1%	4,0%
At a library	5,0%	0,4%	0,1%	2,9%	3,3%	1,7%	1,1%	0,5%	0,5%	1,9%
Any Kind of Access	92,0%	70,7%	70,3%	77,2%	84,2%	75,0%	86,0%	80,2%	76,9%	82,1%

Source: StatsSA GHS, 2024.

3 ICT Data Collected By ICASA

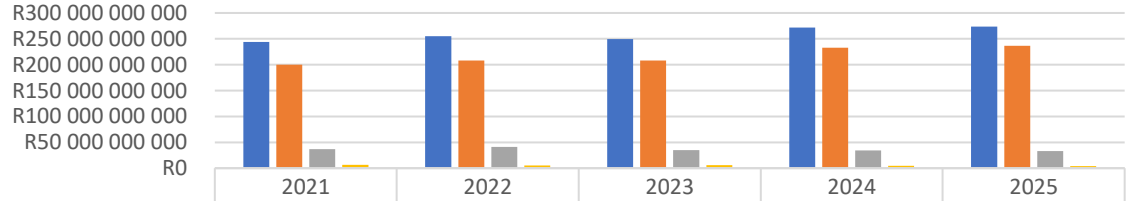
This section reports on the aggregated data that was collected by ICASA through the ICT industry questionnaires sent to licensees in November 2025.

3.1 Revenue for The Three Sectors (Telecommunication, Broadcasting, And Postal) Regulated by ICASA.

In 2025, the total revenue generated by the three sectors showed only a slight overall increase of 0.8%. Among them, the telecommunications sector was the only one to record growth, increasing by 1.6% during the year. In contrast, the broadcasting sector experienced a noticeable decline, with revenue decreasing by 4.6%. The postal sector recorded a decrease of 2.3% over the same period. These figures indicate that while telecommunications continued to expand modestly, both broadcasting and postal services struggled financially, contributing to the limited overall growth across the combined sectors.

Over the five-year period from 2021 to 2025, the combined revenue of the three sectors recorded a compound annual growth rate of 3.0%. Telecommunications showed strong performance, growing at 4.2%, while broadcasting declined by 2.7%. The postal sector experienced the steepest drop, with revenue falling by 10.0%.

Graph 5: Total revenue of the 3 sectors, for the 12 months ending 30th September each year.



	2021	2022	2023	2024	2025
Total combined for 3 sector revenue	R243 657 771 045	R254 881 511 121	R249 253 672 693	R271 722 794 891	R273 782 518 828
Total telecommunication revenue	R200 250 923 462	R208 145 121 928	R208 288 440 948	R232 667 956 493	R236 424 661 613
Total broadcasting revenue	R36 798 752 670	R41 202 864 454	R35 256 064 407	R34 624 793 241	R33 028 322 880
Total postal service revenue	R6 608 094 913	R5 533 524 738	R5 709 167 338	R4 430 045 157	R4 329 534 335

Source: ICASA Electronic Telecommunications, Broadcasting and Postal Questionnaire 2021 – 2025.

3.2 Procurement Spend to All Suppliers in All 3 Sectors.

The Broad-Based Black Economic Empowerment (B-BBEE) programme seeks to reduce economic inequality by encouraging inclusive Procurement across regulated industries. Analysis of Procurement data from the telecommunications, broadcasting, and postal sectors indicates sustained efforts to engage suppliers that meet B-BBEE criteria. Over the five-year period, spending directed toward compliant suppliers remained strong, reflecting measurable progress toward sector transformation goals.

Reporting on B-BBEE Procurement performance enables ICASA to monitor compliance with national transformation policies, assess the effectiveness of regulatory interventions, and promote accountability within regulated entities. It also provides evidence of progress in advancing economic inclusion, informs policy development, and supports government oversight of transformation in the 3 sectors.

The telecommunications sector recorded a B-BBEE-compliant Procurement spend of 93.9% in 2025, underscoring its strong commitment to transformation. The broadcasting sector achieved 68.8%, reflecting steady progress, although at a lower level than telecommunications. Meanwhile, The Postal Services Sector posted an impressive 70.2% for the same period, demonstrating notable alignment with national empowerment objectives.

Graph 6: Procurement spend to all suppliers in all 3 sectors.

	Telecommunication Procument Spend from all suppliers	Telecommunication Procument Spend paid to suppliers based on the B-BBEE Procument Recognition Levels	Broadcasting Procument Spend from all suppliers	Broadcasting Procument Spend paid to suppliers based on the B-BBEE Procument Recognition Levels	Postal service Procument Spend from all suppliers	Postal service Procument Spend paid to suppliers based on the B-BBEE Procument Recognition Levels
2021	R124 166 572 439	R105 744 926 535	R2 831 020 620	R2 037 867 747	R288 366 514	R44 550 384
2022	R166 088 114 064	R140 656 257 045	R3 452 184 689	R1 661 978 084	R311 501 157	R47 537 462
2023	R174 448 994 355	R148 548 687 099	R5 764 476 023	R2 970 808 031	R1 957 859 862	R1 506 454 359
2024	R202 465 092 559	R185 798 039 765	R7 550 891 549	R5 867 659 902	R94 153 427	R91 500 648
2025	R191 704 967 478	R180 040 208 213	R4 082 013 949	R2 808 947 321	R154 214 576	R108 268 985

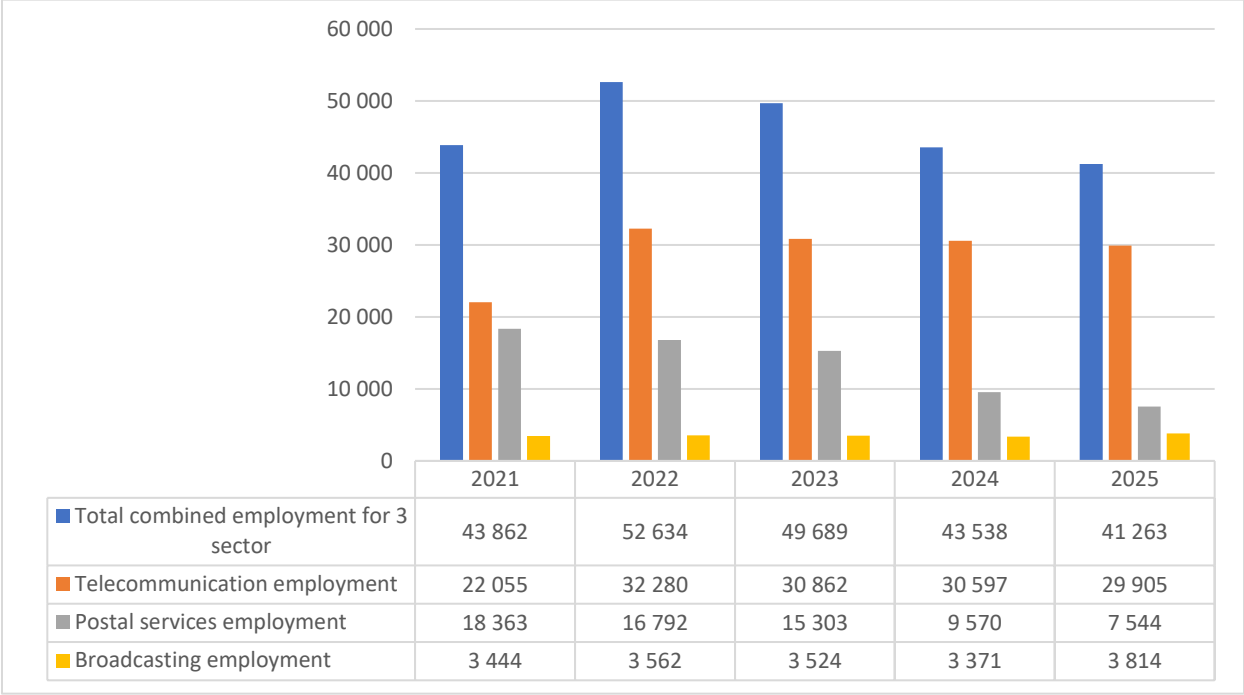
Source: ICASA Electronic Communications, Broadcasting and Postal Questionnaires, 2021 – 2025.

3.3 Employment Levels for the Three Sectors

In 2025, total employment across the three sectors decreased by 5.2%, reflecting growing structural pressures within the communications industry. Telecommunications experienced a modest decrease of 2.3%, suggesting limited workforce adjustments compared with other segments. The Postal Services Sector recorded a sharp decline of 21.2%, largely attributed to shrinking mail volumes and the rapid shift toward digital communication and electronic transactions. Broadcasting registered an increase of 13.1% for the same period.

The compound annual growth rate (CAGR) over the five-year period shows a slight overall decline of 1.5% in total employment across the three sectors. Telecommunications employment increased by 7.9%, while broadcasting recorded growth of 2.6%. In contrast, The Postal Services Sector experienced a substantial decrease of 19.9%.

Graph 7: Total employment for the 3 sectors, as of 30th September each year.



	2021	2022	2023	2024	2025
Total combined employment for 3 sector	43 862	52 634	49 689	43 538	41 263
Telecommunication employment	22 055	32 280	30 862	30 597	29 905
Postal services employment	18 363	16 792	15 303	9 570	7 544
Broadcasting employment	3 444	3 562	3 524	3 371	3 814

Source: ICASA Electronic Communications, Broadcasting and Postal Questionnaires 2021 – 2025.

4 Telecommunications Sector

In 2025, ICASA continued to advance spectrum policy and management to support expanded network capacity and technological innovation. The Authority published draft regulations on Dynamic Spectrum Access (DSA) and Opportunistic Spectrum Management for public consultation, to improve spectrum efficiency and enable flexible use of under-utilised frequencies to foster new services and technologies. Public hearings on these draft regulations were held in October, allowing stakeholders to provide input on optimizing spectrum access, particularly for underserved areas. Additionally, ICASA held hearings in January 2026 on the Second Draft National Radio Frequency Plan that outlines how radio frequencies will be allocated to support communication services across broadcasting, mobile networks, satellite systems, and other technologies, reinforcing spectrum planning as a core regulatory function.

ICASA has taken steps to modernize its regulatory approach to market participation and consumer safeguards. In early 2025, the Authority conducted hybrid public hearings on a proposed new licensing framework for satellite services, aiming to provide greater clarity and certainty for potential satellite operators entering the South African market and supporting competition in previously constrained segments. In parallel, amendments to the End-User and Subscriber Service Charter were promulgated to strengthen consumer protection, particularly addressing concerns around prepaid data expiry a reform welcomed by the parliamentary Portfolio Committee as contributing to efforts to reduce the cost of living. These measures show ICASA's dual focus on facilitating new market entry while enhancing service quality and consumer rights.

In 2025, the International Telecommunication Union (ITU) released its Facts and Figures 2025 report that showed that nearly three-quarters of the world's population were online, with an estimated 6 billion users, although about 2.2 billion people remain offline. The report highlights significant progress in mobile broadband coverage and the growing adoption of 5G technology that now accounts for over one-third of all mobile broadband subscriptions, while also pointing to persistent affordability and quality gaps in low- and middle-income countries. This data provides critical insight into global connectivity trends and underscores the ongoing need for coordinated regulatory and infrastructure efforts to close digital divides.

Recognising the importance of regional collaboration, ICASA highlighted that the Communications Regulators' Association of Southern Africa CRASA hosted a major industry workshop alongside the first Universal Access and Service Committee (UASC) meeting for 2025/26, focused on regional broadband targets. The workshop and UASC session brought together national regulators from across the region to discuss and formulate draft SADC broadband targets for 2030. These initiatives aim to harmonise efforts to expand access, improve affordability, and enhance meaningful connectivity for underserved communities. Such collaborative regional activities demonstrate CRASA's ongoing commitment to promoting telecommunications development and advancing inclusive digital access across member states.

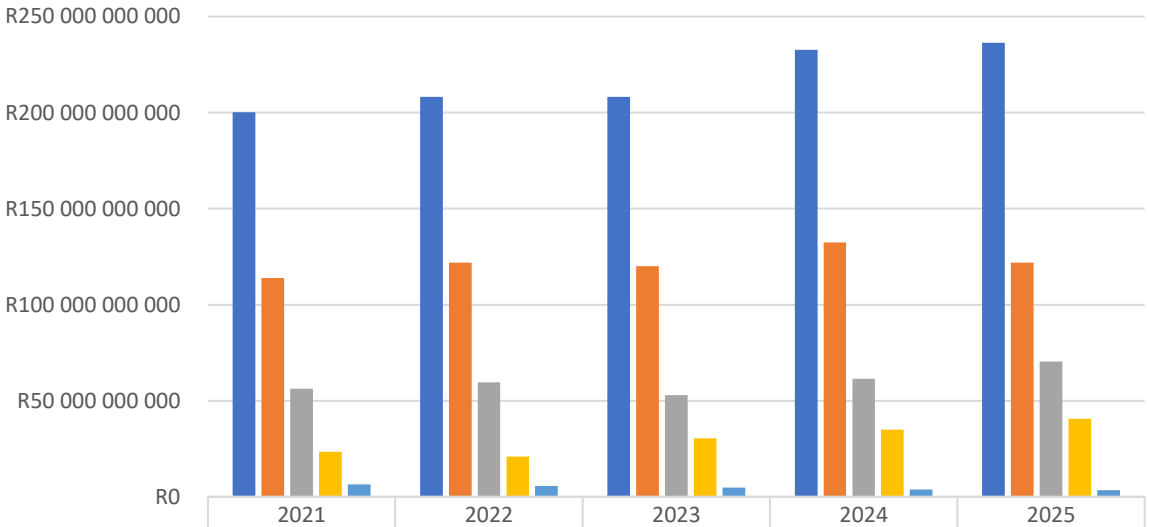
4.1 Telecommunications Sector Revenues

OTT context: OTT platforms continue to shift revenue from legacy services toward data-driven products. Traditional voice and SMS usage declines as consumers migrate to OTT communication and content services, while fixed and mobile data uptake grows in response. These patterns explain the continued contraction in mobile services revenue and simultaneous growth in fixed internet and data services.

In 2025, the telecommunications sector recorded a modest overall revenue increase of 1.6%, indicating a generally stable market despite mixed performance across service categories. Revenue from other services increased significantly by 14.7%, suggesting increased diversification beyond traditional offerings and possibly stronger uptake of value-added products such as digital platforms or enterprise solutions. Fixed internet and data services also performed strongly, increased by 16.2%, which reflects rising demand for reliable connectivity, remote work support, streaming, and online education. However, mobile services revenue (RM) decreased by 7.9%, pointing to potential price competition, market saturation, and changing consumer usage patterns such as greater reliance on data bundles instead of voice services. Fixed line revenue experienced an even steeper decrease of 11.8%, continuing a longer-term shift away from traditional landline services toward mobile and broadband alternatives. Overall, the figures highlight a transition toward data-driven services shaping industry growth.

Over the five-year period from 2021 to 2025, the total telecommunications revenue grew at a compound annual growth rate (CAGR) of 4.2%. Mobile services rose slightly by 1.7%, while fixed internet and data expanded rapidly at 14.7%. In contrast, fixed-line services declined sharply by 15.0%, reflecting continued consumer migration to digital connectivity.

Graph 8: Telecommunications revenue, for the 12 months ending 30th September each year.



	2021	2022	2023	2024	2025
Total telecommunication revenue	R200 250 923 462	R208 145 121 928	R208 288 440 948	R232 667 956 493	R236 424 661 613
Total mobile services revenue (Rm)	R113 945 854 241	R121 997 905 960	R120 113 480 913	R132 381 790 236	R121 933 397 042
Total of any other revenue	R56 294 725 060	R59 659 355 796	R52 908 999 736	R61 458 639 603	R70 473 044 705
Total Fixed Internet and data revenue	R23 493 901 812	R20 915 629 887	R30 505 505 575	R34 966 212 674	R40 612 082 790
Total fixed line revenue	R6 516 442 350	R5 572 230 285	R4 760 454 724	R3 861 313 980	R3 406 137 075

Source: ICASA Electronic Communications Questionnaire 2021 – 2025.

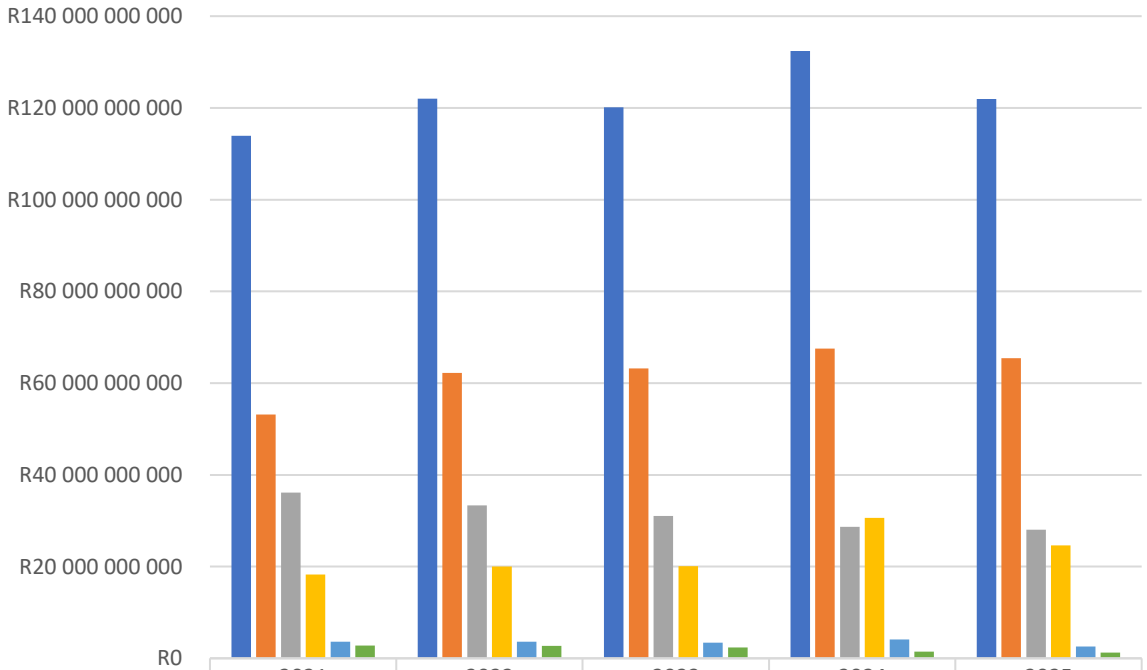
4.1.1 Total Mobile Services Revenue (R)

OTT context: Declines in SMS and voice revenue are consistent with long-term substitution toward OTT messaging and calling applications. While these platforms reduce monetisable usage of traditional services, they contribute to rising broadband demand as consumers rely increasingly on data-driven communication. This dual effect explains why mobile service revenues weaken even as total traffic continues to rise.

In 2025, total mobile services revenue decreased by 7.9%, reflecting widespread contraction across all major service categories. Mobile data revenue decreased by 3.1%, suggesting slower growth in data usage and increased price competition within the market. Voice service revenue also decreased by 2.0%, continuing the gradual shift away from traditional calling toward internet-based communication platforms. The steepest decline occurred in text and multimedia messaging services, which fell by 37.9%, highlighting the dominance of over-the-top messaging applications. Outbound roaming revenue decreased by 12.4%.

Over five years (compound annual growth rate (CAGR)), total mobile services revenue slightly increased by 1.7%. Mobile data services revenue increased by 5.4%, while voice services decreased by 6.1%, text and multimedia messaging services experienced a decrease of 8.3%, and outbound roaming decreased by 18.3%.

Graph 9: Mobile services revenue for the 12 months, ending 30th September each year.



	2021	2022	2023	2024	2025
Total mobile services revenue (Rm)	R113 945 854 241	R121 997 905 960	R120 113 480 913	R132 381 790 236	R121 933 397 042
Revenue from mobile data services	R53 128 234 464	R62 234 431 138	R63 200 961 447	R67 536 521 904	R65 458 817 332
Revenue from voice services	R36 101 920 184	R33 364 856 049	R31 034 769 803	R28 644 294 682	R28 056 129 561
Other mobile services revenue	R18 256 374 065	R20 038 349 117	R20 098 686 768	R30 622 171 327	R24 589 103 908
Revenue from text and multimedia messaging services	R3 644 150 398	R3 636 696 919	R3 442 145 619	R4 146 032 890	R2 573 964 979
Revenue from outbound roaming (R)	R2 815 175 130	R2 723 572 737	R2 336 917 275	R1 432 769 432	R1 255 381 262

Source: ICASA Electronic Communications Questionnaire 2021 – 2025.

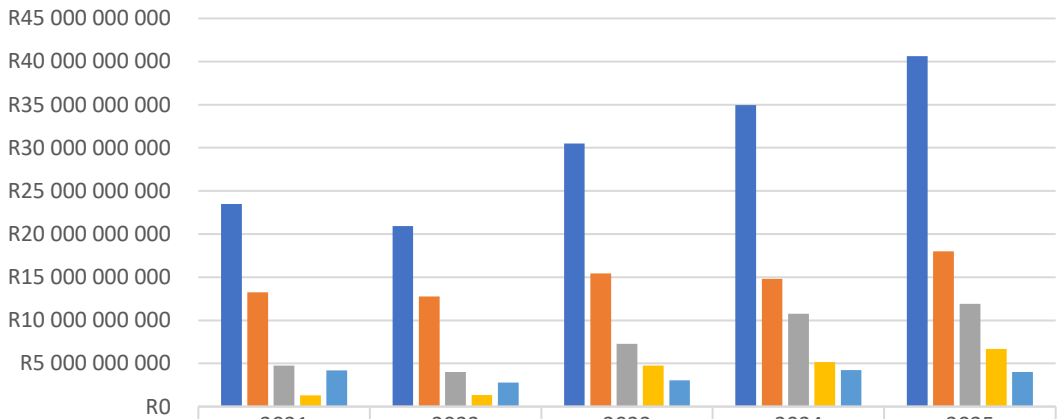
* Other mobile services revenue refers to any mobile revenue excluding mobile data services, voice services, text and multimedia messaging services and outbound roaming. *

4.1.2 Total Fixed Internet and Data Revenues

In 2025, total fixed internet and data revenue grew by 16.1%, mainly driven by a strong 21.5% increase in revenue from fixed (wired) broadband services and a 10.6% rise in fixed internet revenue. However, revenue from other telecommunication services including leased lines and fixed value-added services decreased by 5.4%, which partially offset the overall growth in the segment.

Over five years, the compound annual growth rate (CAGR) for total fixed internet and data revenue increased by 14.7%, fixed (wired) broadband services revenue increased by 7.9%, while other telecommunication services revenue, including leased lines revenue and fixed value-added telecommunication services decreased by 1.1% for the same period.

Graph 10 Fixed internet and data revenue, 12 months ending 30th September each year.



	2021	2022	2023	2024	2025
Total Fixed Internet and data revenue	R23 493 901 812	R20 915 629 887	R30 505 505 575	R34 966 212 674	R40 612 082 790
Revenue from fixed (wired)-broadband services	R13 262 951 804	R12 782 037 634	R15 430 350 929	R14 803 339 899	R17 987 156 906
Fixed Internet revenue (R)	R4 737 468 356	R4 005 275 325	R7 279 966 001	R10 773 781 464	R11 917 973 878
Other wireless-broadband services revenue	R1 297 502 236	R1 349 787 213	R4 761 366 105	R5 151 772 972	R6 697 891 224
Other telecommunication services revenue, including leased lines revenue and fixed value-added telecommunication services	R4 195 979 416	R2 778 529 716	R3 033 822 540	R4 237 318 338	R4 009 060 782

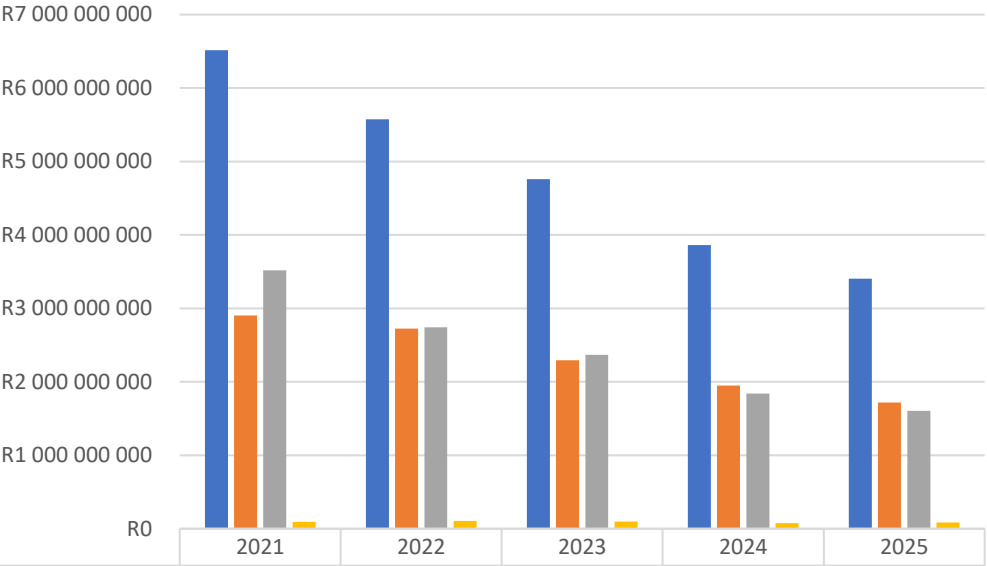
Source: ICASA Electronic Communications Questionnaire, December 2021 – 2025.

4.1.3 Total Fixed Line Revenue

In 2025, total fixed-line revenue declined by 11.8%. Revenue from fixed-telephone calls decreased by 11.9%, and while Revenue from retail fixed-telephone services significantly increased by 15.8%.

Over the five-year period, total fixed-line revenue declined by 15.0%, with fixed-telephone calls decreasing by 12.3% and fixed-telephone subscription charges decreasing by 17.8%. Overall trends indicate ongoing shifts in consumer behaviour away from legacy fixed telephony.

Graph 11: Total Fixed line revenue, 12 months ending 30th September each year.



	2021	2022	2023	2024	2025
Total fixed line revenue	R6 516 442 350	R5 572 230 285	R4 760 454 724	R3 861 313 980	R3 406 137 075
Revenue from fixed-telephone calls	R2 903 360 189	R2 723 211 382	R2 295 182 145	R1 948 441 562	R1 716 499 417
Revenue from fixed-telephone subscription charges	R3 517 593 998	R2 743 241 716	R2 368 400 284	R1 838 688 708	R1 603 741 136
Revenue from retail fixed-telephone services	R95 488 163	R105 777 187	R96 872 295	R74 183 710	R85 896 522

Source: ICASA Electronic Communications Questionnaire, December 2021 – 2025.

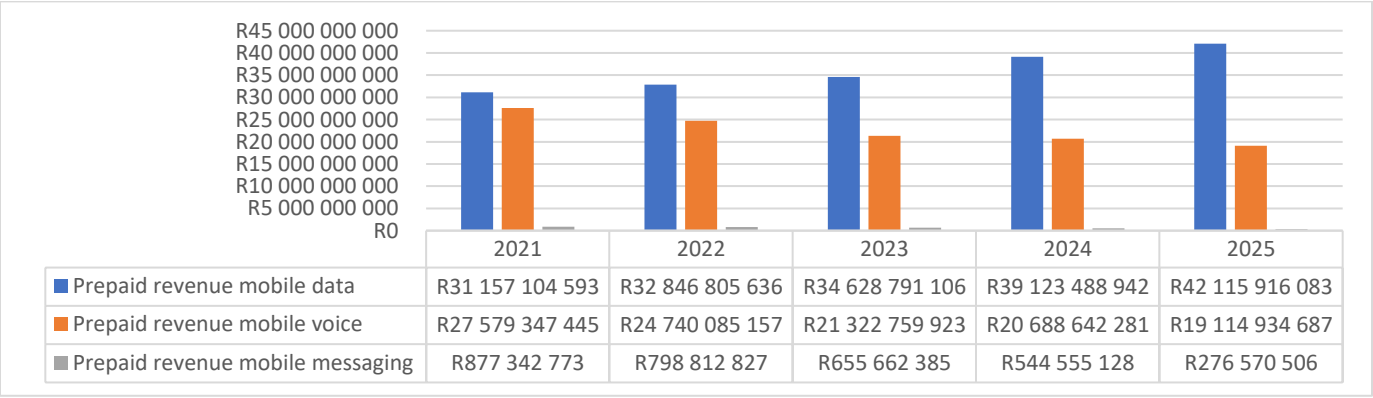
4.1.4 Prepaid Mobile Voice, Data and Messaging Revenue

In 2025, revenue from prepaid mobile data increased by 7.7%, reflecting a continued shift in consumer behaviour toward internet-based services. More customers relied on smartphones for streaming, social media, online learning, and mobile banking, all of which require significant data usage. Network upgrades and wider 4G and 5G coverage by also made mobile internet faster and more reliable, encouraging subscribers to purchase larger data bundles.

In contrast, prepaid mobile voice revenue declined by 7.6%, while mobile messaging revenue dropped sharply by 49.2% in 2025. These decreases were largely driven by the growing popularity of over-the-top (OTT) applications such as WhatsApp, Telegram, and Signal that allow users to make voice calls and send messages using data at little or no extra cost. As consumers increasingly adopted these platforms, traditional calling and SMS services became less essential. Economic pressure also pushed customers to minimize spending on legacy services, accelerating the long-term transition from voice and text toward data-centric mobile usage.

Over the five-year period, prepaid mobile data revenue increased by 7.8%, while prepaid mobile voice revenue decreased by 8.8%. prepaid mobile messaging revenue saw a decline of 25.1%.

Graph 12: prepaid mobile voice, data and messaging revenue for the 12 months ending on 30th September each year.



	2021	2022	2023	2024	2025
Prepaid revenue mobile data	R31 157 104 593	R32 846 805 636	R34 628 791 106	R39 123 488 942	R42 115 916 083
Prepaid revenue mobile voice	R27 579 347 445	R24 740 085 157	R21 322 759 923	R20 688 642 281	R19 114 934 687
Prepaid revenue mobile messaging	R877 342 773	R798 812 827	R655 662 385	R544 555 128	R276 570 506

Source: ICASA Electronic Communications Questionnaire 2021 – 2025.

4.2 Internet Affordability Analysis: Mobile Data and Fixed Broadband in Relation to Monthly Gross National Income (GNI) Per Capita (P.c.)

The ICT Price Basket (IPB) was first introduced by the International Telecommunication Union (ITU) in 2009 as part of its Measuring the Information Society programme. Its purpose was to create a standardised, globally comparable method for assessing the cost and affordability of essential ICT services including mobile voice, SMS, mobile broadband and fixed broadband across more than 160 economies. The IPB was developed in response to growing global recognition that high communication prices were a barrier to digital inclusion, and that policymakers needed a reliable tool to benchmark and track affordability over time.

The methodology was developed and continuously refined through the Expert Group on Telecommunication/ICT Indicators (EGTI), a global working body established under the ITU in 2009. EGTI includes representatives from national regulators, statistical offices, ministries, operators, researchers and regional organisations, who collaborate to define indicators, propose revisions, and ensure that the price basket reflects real-world consumption patterns.

The 2024–2025 update was particularly significant because the ITU revised the methodology to reflect modern digital consumption (greater data use, OTT-driven behaviour, and convergence between mobile and fixed services). This revision was endorsed through international consultations involving regulators, ministries and experts worldwide, and is now applied in ICT Price Basket data for 2025 onwards.

The Broadband Commission for Sustainable Development is a high-level international policy body that was established in 2010 by two United Nations agencies: the International Telecommunication Union (ITU) and the UNESCO Secretariat. It brings together over 50 global leaders including ministers, heads of regulatory authorities, Executives of major ICT companies, development banks, academics, civil society leaders and international organisations.

The Commission's mandate is to accelerate broadband access, affordability, and meaningful digital connectivity as an enabler of social and economic development worldwide. To support this mandate, the Commission produces global policy recommendations and quantitative targets. **One of its most influential policy benchmarks is the 2% affordability target, which states that entry-level broadband (mobile or fixed) should cost no more than 2% of monthly Gross National Income per capita.** This benchmark was recommended because research showed that when broadband prices exceed 2% of income, adoption drops sharply, especially in developing countries; prices below this threshold enable wider household access, digital participation, and inclusive economic growth. The 2% rule therefore became a globally recognised benchmark used by governments and regulators including ITU Member States to measure affordability progress and identify markets where high broadband prices remain a barrier to meaningful connectivity.

Methodology – How Rand Values Were Calculated.

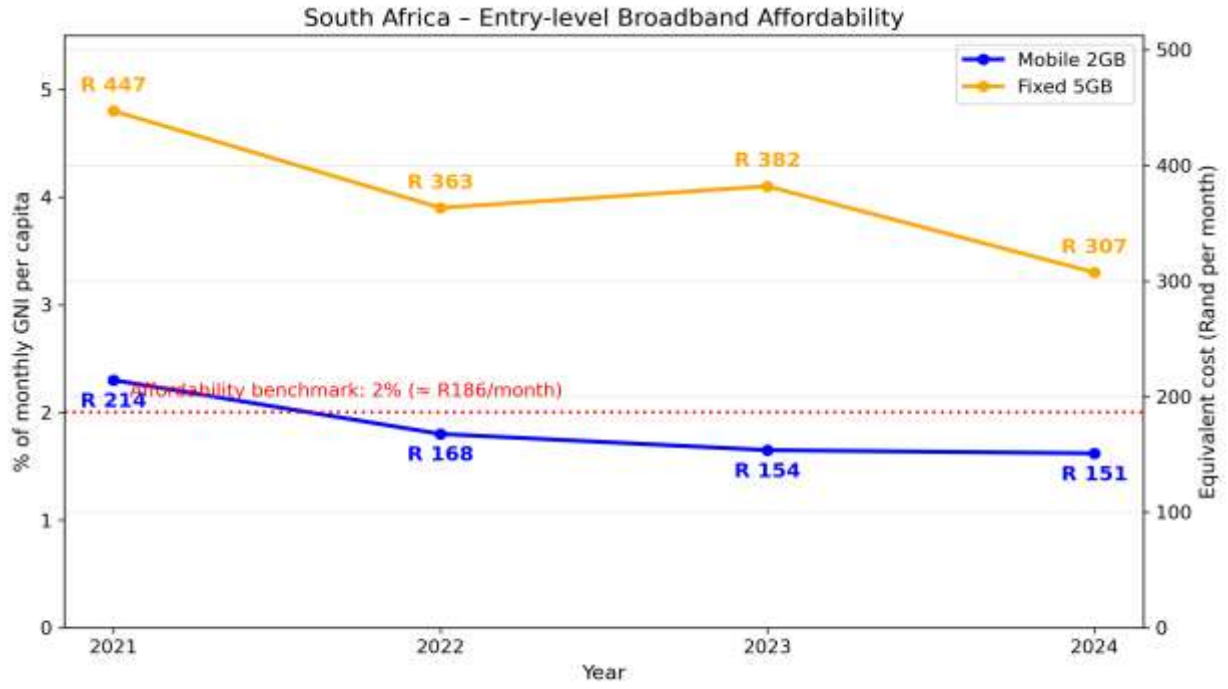
- Baseline: South Africa monthly GNI per capita ≈ R 9,318 (World Bank Atlas GNI per capita USD 6,100 × average 2024 USD/ZAR ≈ 18.33).
- Conversion: Rand = (% of GNI ÷ 100) × R 9,318
- Affordability benchmark: ≤ 2% of monthly GNI = R 186.36 (***Broadband Commission).***
  Data integrity: Only ITU 2024 values were used; countries missing values were excluded; no estimates applied.

4.2.1 South Africa Data-only Basket, % Of Monthly GNI P.c. in Rands

South Africa's mobile broadband affordability has shown consistent improvement from 2021 to 2024, dropping from around 2.3% to 1.63% of monthly GNI per capita, equivalent to a decline from roughly R215 to R152 per month, well below the affordability benchmark of R186.36. This indicates strong competitive pressure and sustained price efficiency in the prepaid mobile data market, with South Africa meeting global affordability standards for three consecutive years.

In contrast, fixed broadband (5GB) remains a major affordability challenge. Although prices improved from approximately R450 in 2021 to R330 in 2024, the cost still sits around R144 above the affordability threshold, translating to 3.32% of GNI—far higher than the target and more than double the mobile burden. This persistent gap reflects deeper structural issues in the fixed broadband market, including wholesale and infrastructure-driven costs, and underscores the need for targeted interventions to improve affordability and expand digital inclusion.

Graph 13: South Africa Data-only basket, % of monthly GNI p.c. in Rands.



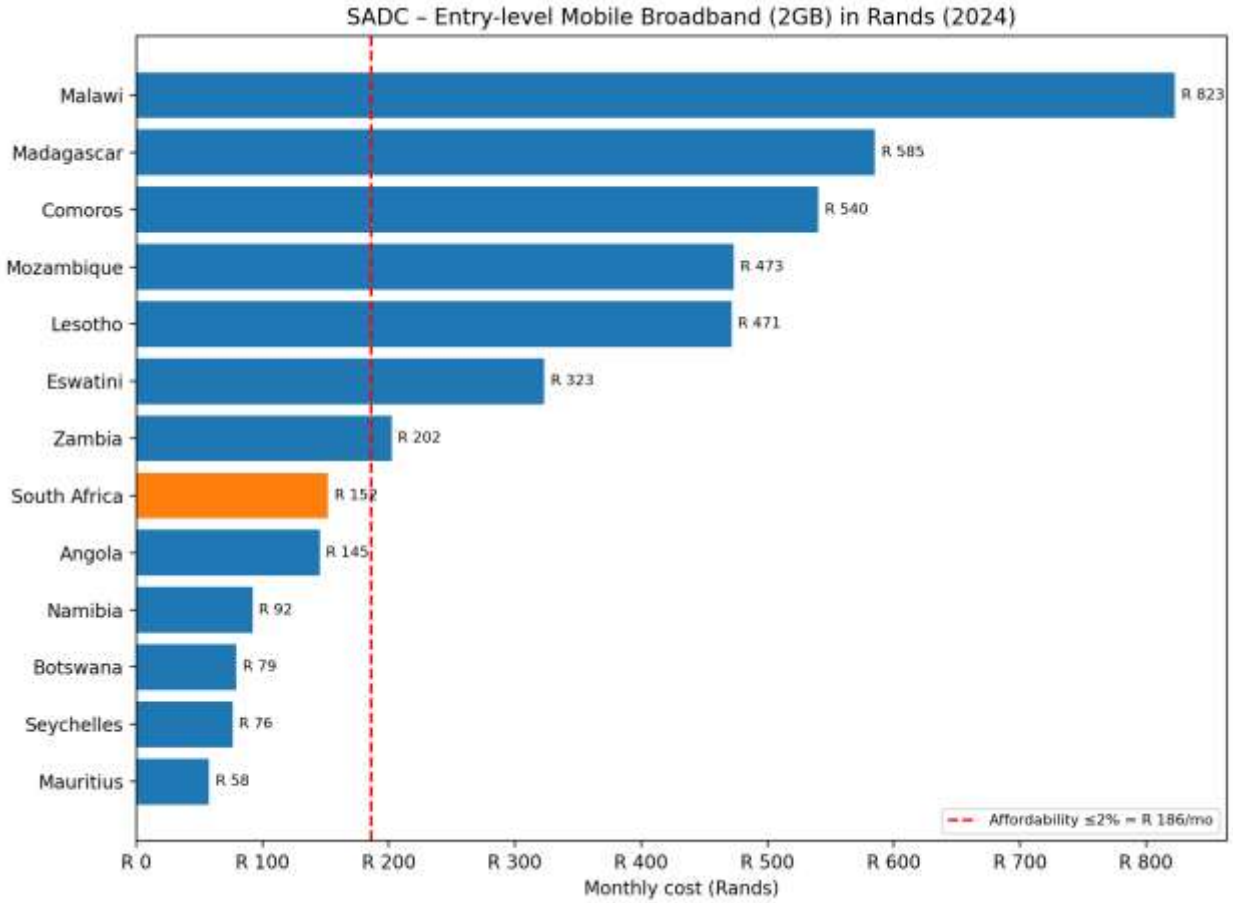
Source: ITU-D-Statistics-ICT price basket 2020 – 2024.

4.2.2 SADC Mobile Affordability (Data-Only, % Of GNI P.c.) in Rands.

South Africa sits in the middle of the SADC region for entry-level mobile broadband affordability in 2024, with a 2GB basket costing R152/month, which is below the affordability benchmark of R186.36. This places South Africa in a stronger position than several neighbouring countries, particularly Malawi (R823), Madagascar (R585), Comoros (R540), Mozambique (R473) and Lesotho (R471), where prices are three to five times higher.

These high-cost markets show the structural affordability challenges in parts of the region, where data remains prohibitively expensive for the average household. By contrast, Seychelles (R76), Botswana (R79), and Mauritius (R58) demonstrate that affordable mobile data is achievable, reflecting more competitive markets, stronger regulatory environments, or more efficient network cost structures.

Graph 14: SADC Mobile affordability (data-only, % of GNI p.c.)



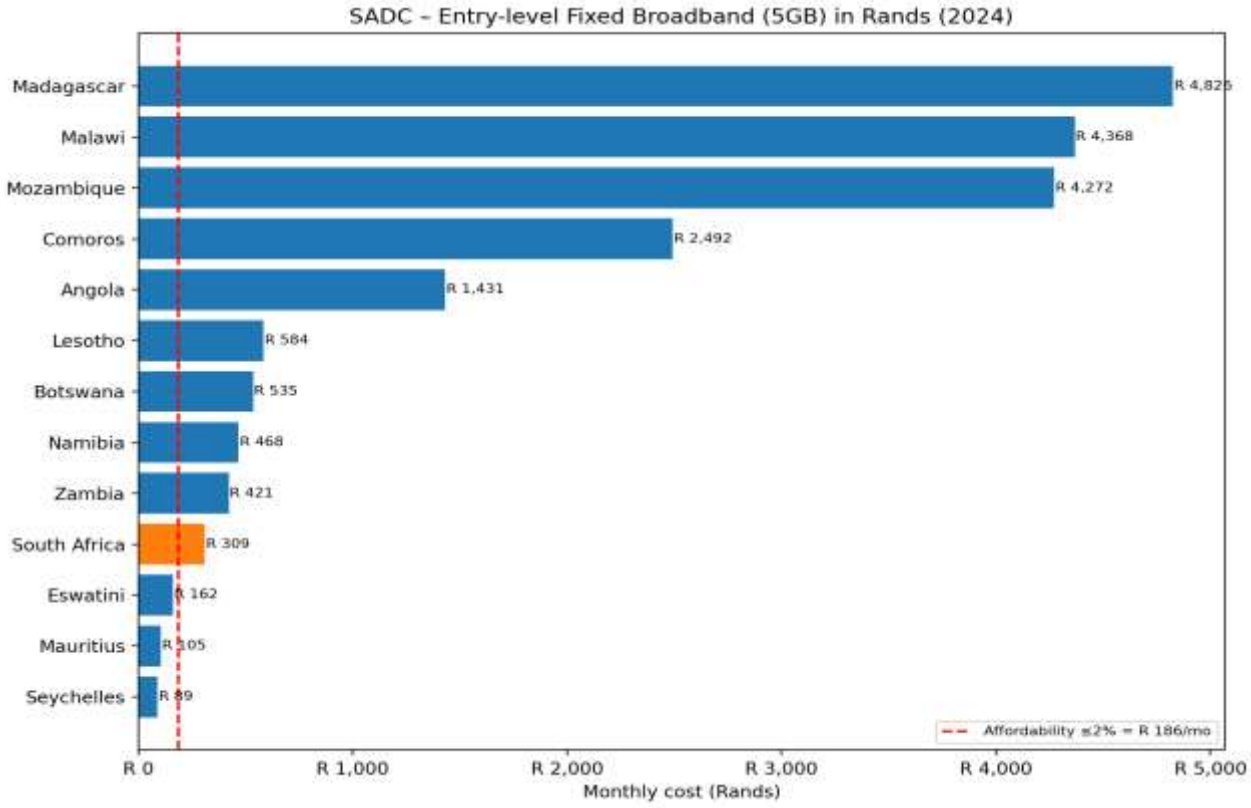
Source: ITU-D-Statistics-ICT price basket 2020 – 2024.

4.2.3 SADC Fixed-Broadband Affordability, Entry, % Of GNI P.c. in Rands

Most SADC countries face extremely high fixed-broadband costs, with 5GB entry-level prices reaching R4,825 in Madagascar, R4,368 in Malawi, and R4,272 in Mozambique, all far above the affordability benchmark of R186.36. Even mid-range countries such as Angola (R1,431), Lesotho (R584), Botswana (R535), and Namibia (R468) remain well outside affordable levels, reflecting widespread structural cost barriers to home-based internet across the region.

South Africa's fixed-broadband cost of R309 per month positions the country below the regional median but still above the affordability target by roughly R123. While more affordable than most neighbours, the gap between South Africa and affordability leaders such as Seychelles (R89) and Mauritius (R105) highlights opportunities to reduce structural costs particularly wholesale and backhaul charges to make fixed broadband more accessible.

Graph 15: SADC Fixed-broadband affordability, entry, % of GNI p.c.



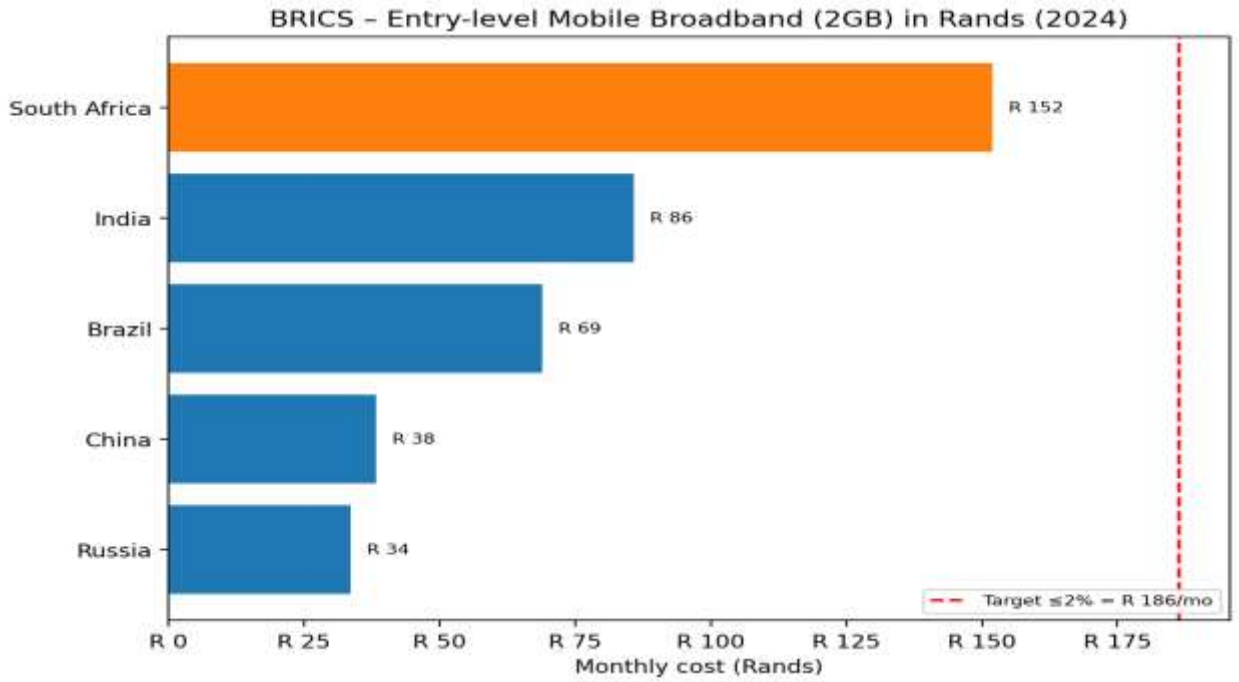
Source: ITU-D-Statistics-ICT price basket 2020 – 2024.

4.2.4 BRICS Mobile Affordability (Data-Only, % Of GNI P.c.)

South Africa records the highest entry-level mobile broadband cost among BRICS countries at R152 per month, although this remains below the affordability benchmark of R186.36 indicated by the red dashed line. India follows at R86, Brazil at R69, while China (R38) and Russia (R34) are the most affordable markets in the group. The wide variation with South Africa costing more than four times Russia's price highlights differing levels of market competition, infrastructure costs, and regulatory environments across BRICS.

Despite being the most expensive in the group, South Africa still meets the international affordability target, but the gap between South Africa and the lowest-cost BRICS peers suggests potential room for improved pricing efficiency and deeper competitive pressure in the mobile data market.

Graph 16: BRICS Mobile affordability (data-only, % of GNI p.c.)

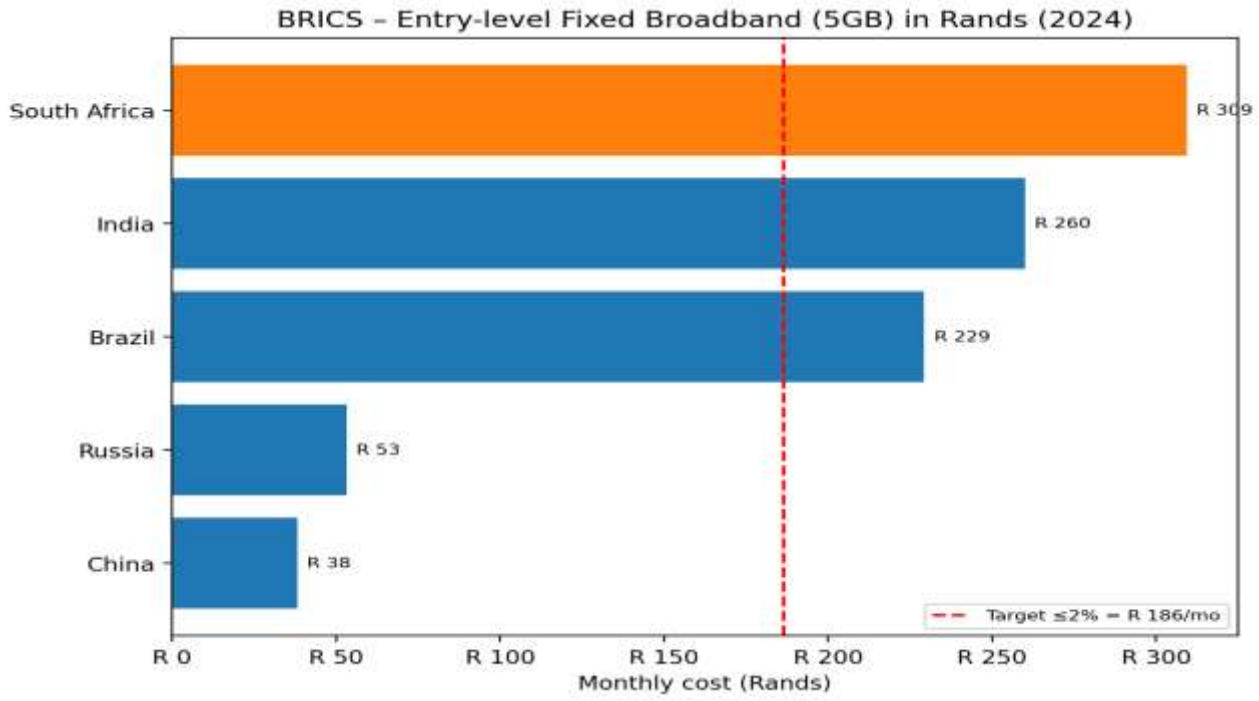


Source: ITU-D-Statistics-ICT price basket 2020 – 2024.

4.2.5 BRICS Fixed Affordability (Data-Only, % Of GNI P.c.)

South Africa has the highest entry-level fixed-broadband cost among BRICS countries in 2024 at R309 per month, placing it well above the affordability benchmark of R186.36, while India (R260) and Brazil (R229) also exceed the target, though by smaller margins. In contrast, Russia (R53) and China (R38) offer significantly more affordable fixed-broadband services, with prices far below the affordability line, indicating stronger cost efficiency or lower structural input costs. The wide gap for South Africa's price being roughly six to eight times higher than those of China and Russia highlights persistent structural and wholesale-cost challenges in South Africa's fixed-broadband market. Overall, the graph shows that South Africa faces a much steeper affordability barrier relative to its BRICS peers, signalling the need for further regulatory, wholesale, and infrastructure reforms to drive down fixed-broadband entry-level prices.

Graph 17: BRICS Fixed affordability (data-only, % of GNI p.c.)



Source: ITU-D-Statistics-ICT price basket 2020 – 2024.

4.2.6 Smartphone price (prepaid & Postpaid device)

Smartphone prices show a clear divergence between entry level and premium devices when comparing 2024 to 2025. The lowest priced smartphones for both prepaid and postpaid categories decreased from R499 to R399, reflecting a 20% drop. This suggests improved affordability at the lower end of the market.

In contrast, the highest priced smartphones rose sharply from R45 999 to R76 999, an increase of about 67%. This substantial jump indicates the introduction of more advanced ultra-premium. Overall, the data shows a widening price gap, with the market becoming more polarised: cheaper devices are becoming more accessible, while premium devices continue moving into higher price tiers.

Table 1: Smartphone prices

Smartphone price	2024	2025
Smartphone Lowest price (prepaid device)	**R499**	**R399**
Smartphone Highest price (prepaid device)	**R45 999**	**R76 999**
Smartphone Lowest price (post-paid device)	**R499**	**R399**
Smartphone Highest price (post-paid device)	**R45 999**	**R76 999**

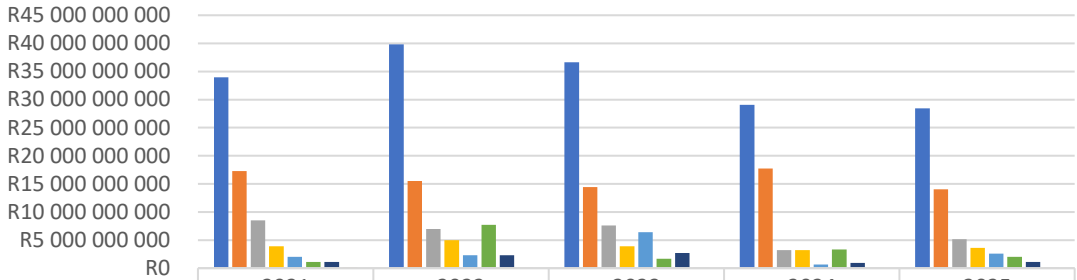
Source: ICASA Electronic Communications Questionnaire as of 2025.

4.2.1.1 Total Telecommunications Investment

In 2025, total telecommunications investment decreased by 2.3%, while spending on mobile communication services dropped sharply by 21.0%. In contrast, annual investment in fixed, wired broadband services increased by 11.9%, indicating a strategic shift toward strengthening long-term infrastructure and expanding reliable high-speed connectivity rather than prioritizing mobile network expansion during the year to support future economic growth and digital inclusion nationwide across communities and industries alike overall.

Over the past five years, the total investment in telecommunications has decreased by 4.4% and annual investment in mobile communication decreased by 5.1% However, during the same period, the 'Expansion' capex sub-item increased by 15.5%.

Graph 18: Telecommunication investment breakdown, for the 12 months ending 30th September each year.



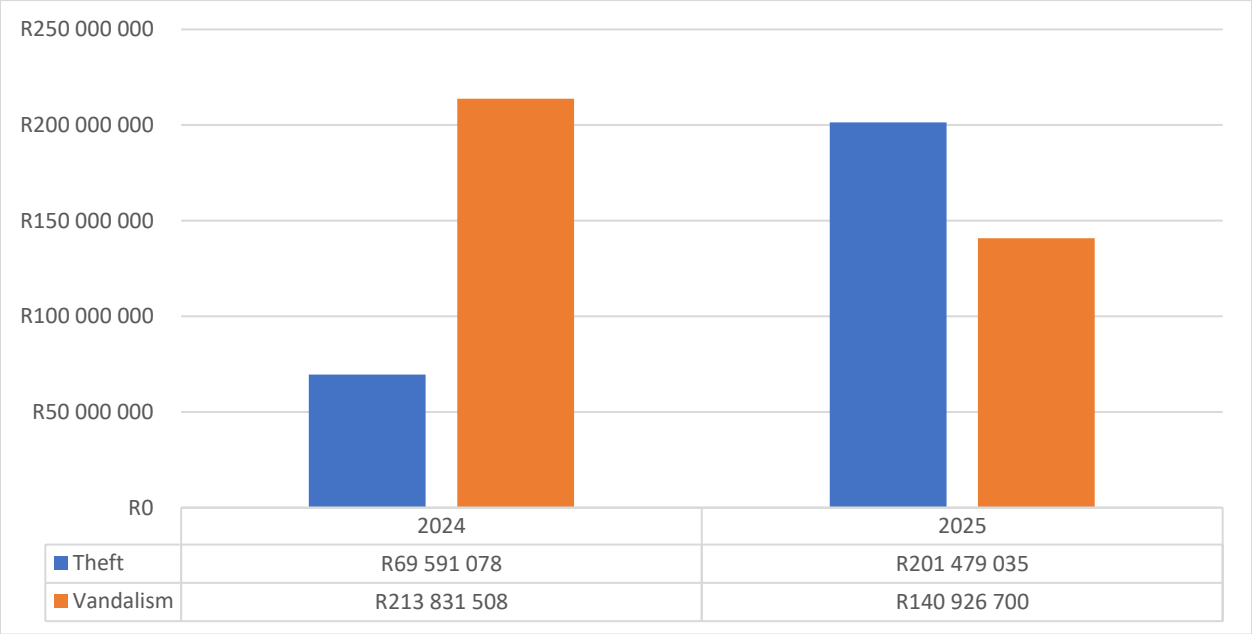
	2021	2022	2023	2024	2025
Total telecommunication investment	R33 969 436 538	R39 798 191 043	R36 637 379 367	R29 080 761 336	R28 416 946 567
Annual investment in mobile communication services	R17 251 321 589	R15 521 568 898	R14 422 457 592	R17 737 369 593	R14 005 894 702
Infrastructure	R8 493 709 643	R6 992 336 135	R7 585 696 568	R3 188 609 771	R5 142 721 858
Annual investment in fixed (wired)-broadband services	R3 880 738 778	R4 952 546 626	R3 877 533 689	R3 212 872 618	R3 596 696 695
Other annual investment in telecommunication services	R2 016 364 145	R2 312 072 877	R6 375 419 116	R664 138 563	R2 564 958 406
Expansion	R1 124 581 032	R7 684 424 456	R1 646 838 406	R3 322 915 751	R2 000 160 658
Maintenance	R1 124 581 032	R2 322 795 887	R2 718 098 002	R937 886 018	R1 084 729 530
Annual investment in fixed-telephone services	R78 140 318	R12 446 164	R11 335 993	R16 969 022	R21 784 718

Source: ICASA Electronic Communications Questionnaire 2021 – 2025.

4.2.1.2 Infrastructure Expenditure: Theft and Vandalism

The major shift between 2024 and 2025 highlights changing security challenges in the telecommunications sector. Theft increased from R69,591,078 to R201,479,035 an approximate 189% rise making it the dominant cost driver in 2025. This surge may reflect increased cable theft, equipment resale markets, or weaknesses in infrastructure protection. Vandalism, however, declined from R213,831,508 to R140,926,700, a 34% decrease, possibly due to improved surveillance, community awareness programmes, or faster response times. Overall, while progress appears to have been made against vandalism, the rapid growth in theft suggests the need for stronger asset protection strategies.

Graph 19: Theft and Vandalism.



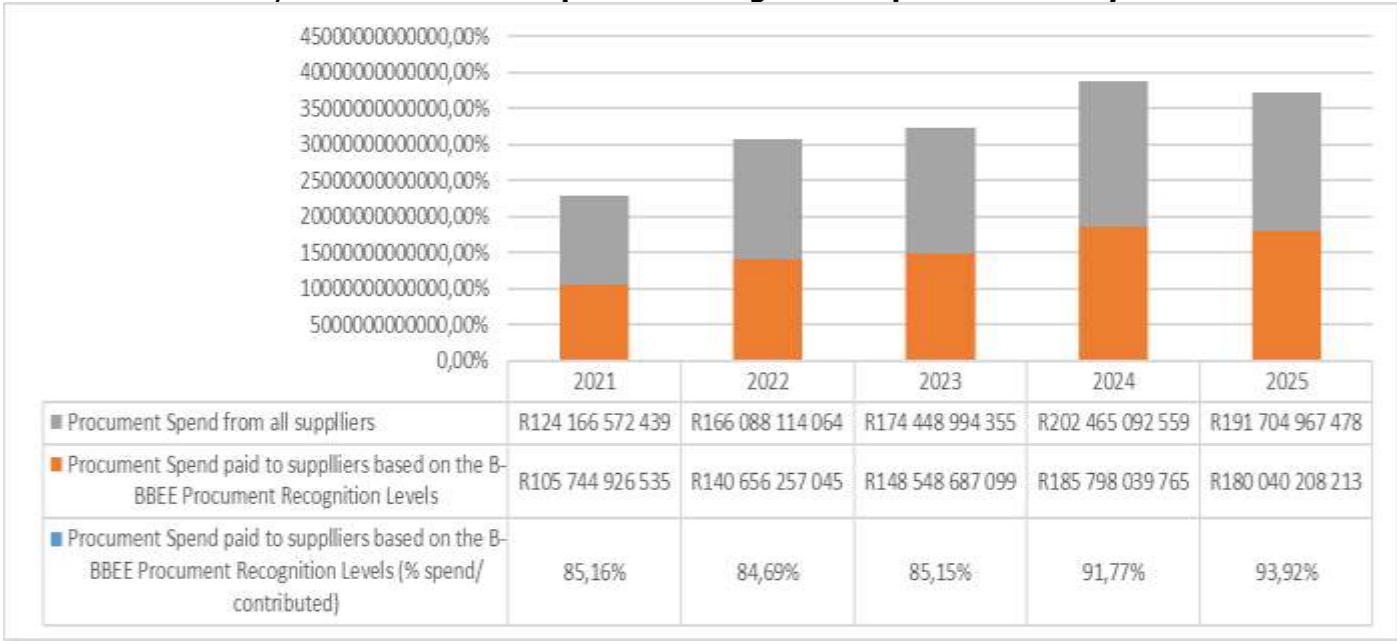
	2024	2025
Theft	R69 591 078	R201 479 035
Vandalism	R213 831 508	R140 926 700

Source: ICASA Electronic Communications Questionnaire 2024 – 2025.

4.3 Telecommunications Procurement Spend to All Suppliers Based On B-BBEE Ranking

Based on the B-BBEE ranking levels, 93.9% of telecommunications Procurement spending, amounting to approximately R180 billion, was allocated to suppliers out of a total spend of R191 billion in 2025. The table below provides an overview of Procurement from 2021 to 2025, highlighting compliance with B-BBEE targets during this period.

Graph 20: Telecommunication Procurement spend to all suppliers based on the B-BBEE, for the 12-month period ending 30th September each year.



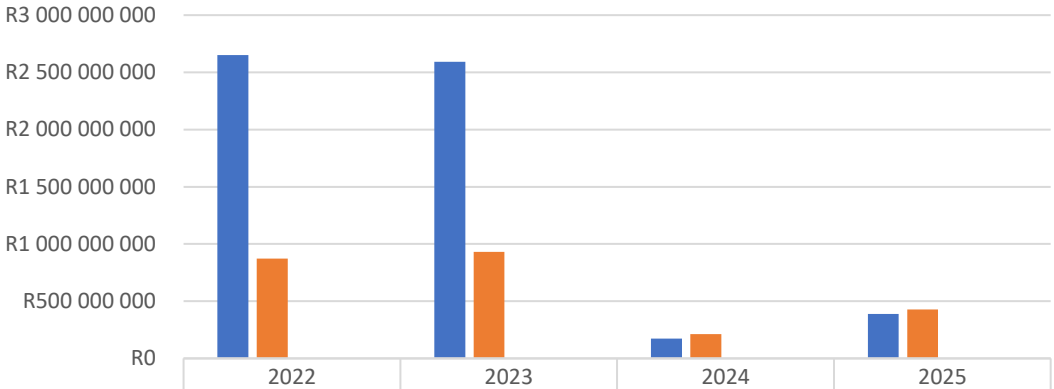
	2021	2022	2023	2024	2025
Procurment Spend from all supplliers	R124 166 572 439	R166 088 114 064	R174 448 994 355	R202 465 092 559	R191 704 967 478
Procurment Spend paid to supplliers based on the B-BBEE Procurment Recognition Levels	R105 744 926 535	R140 656 257 045	R148 548 687 099	R185 798 039 765	R180 040 208 213
Procurment Spend paid to supplliers based on the B-BBEE Procurment Recognition Levels (% spend/ contributed)	85,16%	84,69%	85,15%	91,77%	93,92%

Source: ICASA Electronic Communications Questionnaire 2021 – 2025.

4.4 Batteries And Generators Used When There Is No Electricity (Load Shedding), And Costs Incurred During This Period by Telecommunication Licensees.

The battery costs rose from R173.8 million in 2024 to R387.7 million in 2025—an increase of about R214 million, more than double the prior year. The number of batteries purchased also jumped from 44 708 to 84 829, showing stronger demand or renewed replacement programs. Similarly, generator spending increased from R211.5 million to R426.8 million, up by roughly R215 million. The quantity of generators bought more than doubled, from 855 in 2024 to 1 969 in 2025. Overall, 2025 reflects a strong rebound after the 2024 downturn. Both technologies experienced parallel growth in cost and volume, suggesting expanded budgets, renewed infrastructure investment, or efforts to strengthen backup-power (alternative power supply used when there is no electricity) capacity following the reduced Procurement levels of the previous year.

Graph 21: Number of batteries and generators used during load shedding and costs incurred during this period by service providers, for the 12-month period ending 30th September 2025.



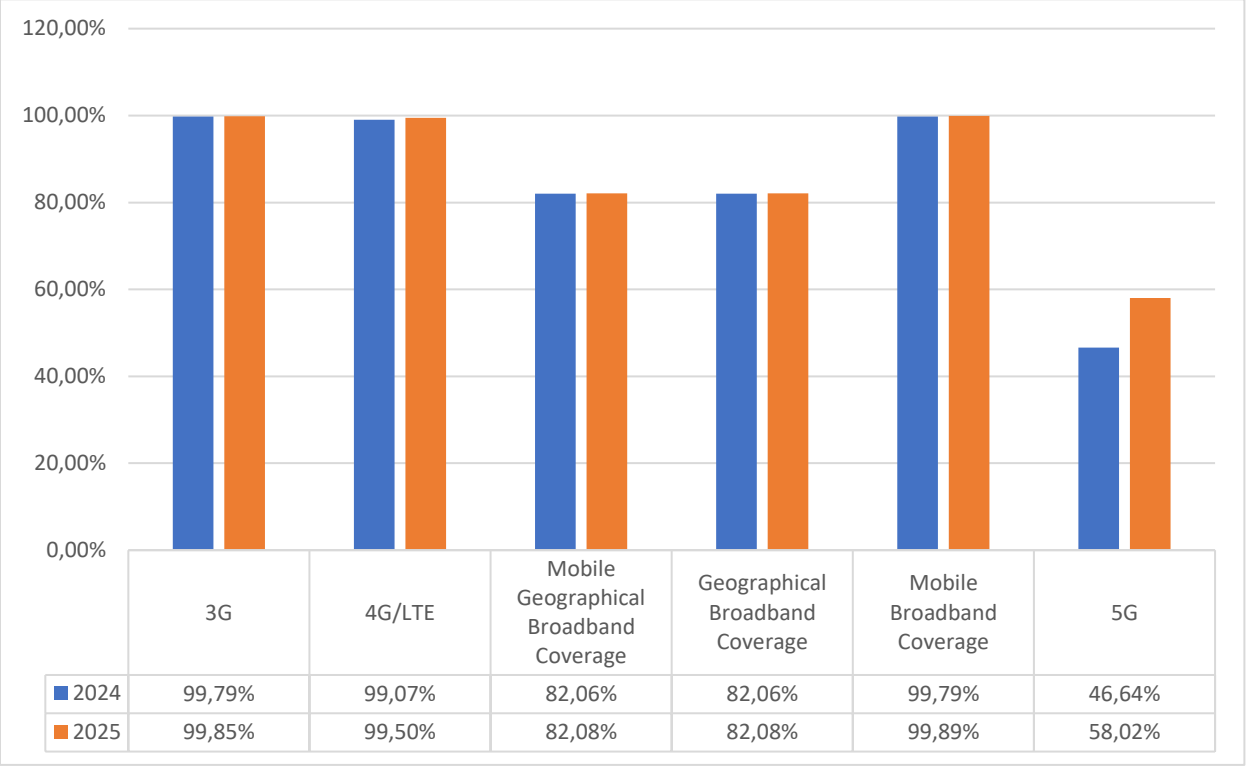
	2022	2023	2024	2025
Total cost spend on batteries	R2 652 130 129	R2 591 565 092	R173 754 518	R387 681 250
Total cost spend on generators	R873 574 647	R930 207 382	R211 472 128	R426 761 377
Total Number of batteries	98 733	150 415	44 708	84 829
Total Number of generators	16 660	3 268	855	1 969

Source: ICASA Electronic Communications Questionnaire 2022 – 2025.

4.5 National Population Coverage

The national population coverage graph indicates overall improvement in network coverage from 2024 to 2025. 3G increased slightly from 99.79% to 99.85%, while 4G/LTE rose more noticeably from 99.1% to 99.5%, showing expanding high-speed access. Mobile broadband coverage also grew from 99.8% to 99.9%. Geographical broadband coverage changed very little, moving only from 82.1% to 82.1%, suggesting limited new area expansion. The largest growth occurred in 5G, which jumped from 46.6% to 58.0%, reflecting rapid rollout but still trailing behind older technologies.

Graph 22: National population coverage.



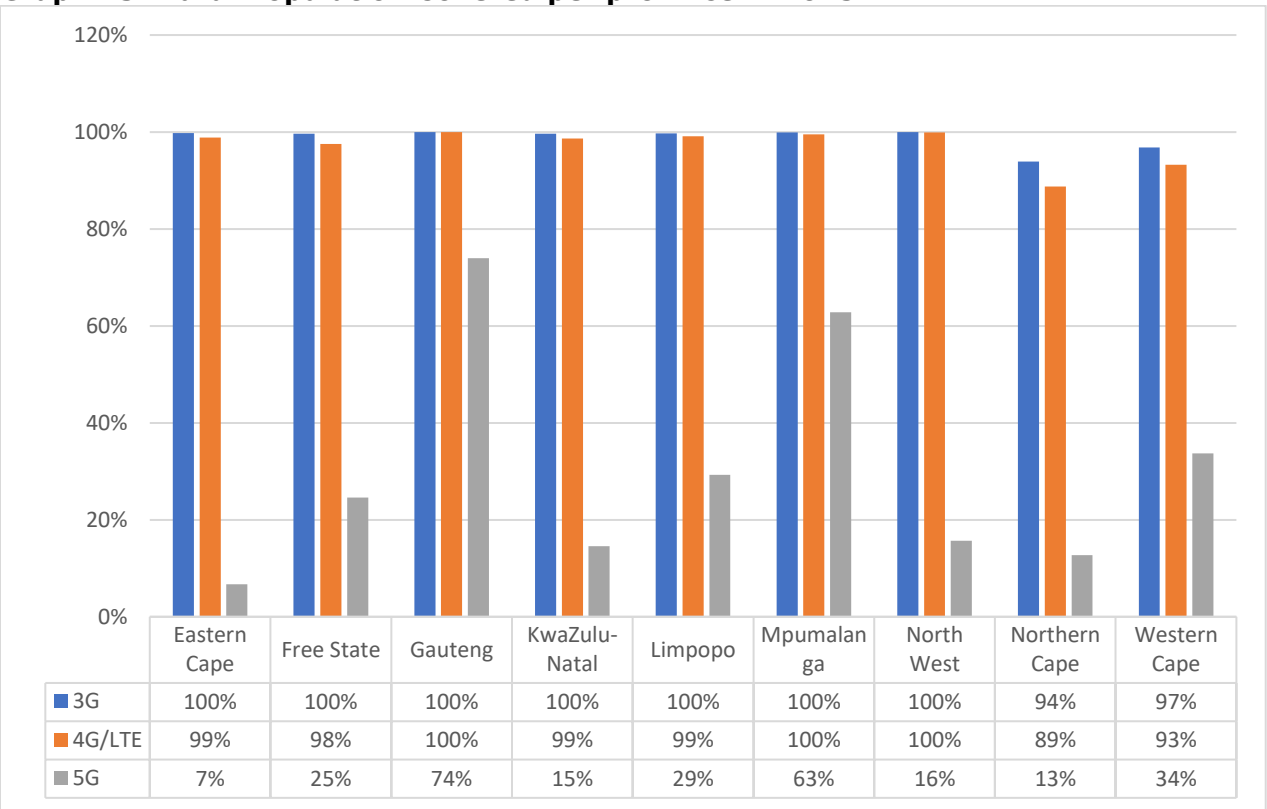
	3G	4G/LTE	Mobile Geographical Broadband Coverage	Geographical Broadband Coverage	Mobile Broadband Coverage	5G
2024	99,79%	99,07%	82,06%	82,06%	99,79%	46,64%
2025	99,85%	99,50%	82,08%	82,08%	99,89%	58,02%

Source: ICASA Electronic Communications Questionnaire 2024 – 2025.

4.5.1 Rural Population Coverage[1]

In 2025, all provinces achieved over 89% coverage for 3G and 4G/LTE, according to licensee reports. However, 5G coverage in rural areas remained limited, with Northern Cape recording the lowest at just 13%, highlighting the disparity in next-generation network availability across the province.

Graph 23: Rural Population Covered per province in 2025.



	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpumalanga	North West	Northern Cape	Western Cape
3G	100%	100%	100%	100%	100%	100%	100%	94%	97%
4G/LTE	99%	98%	100%	99%	99%	100%	100%	89%	93%
5G	7%	25%	74%	15%	29%	63%	16%	13%	34%

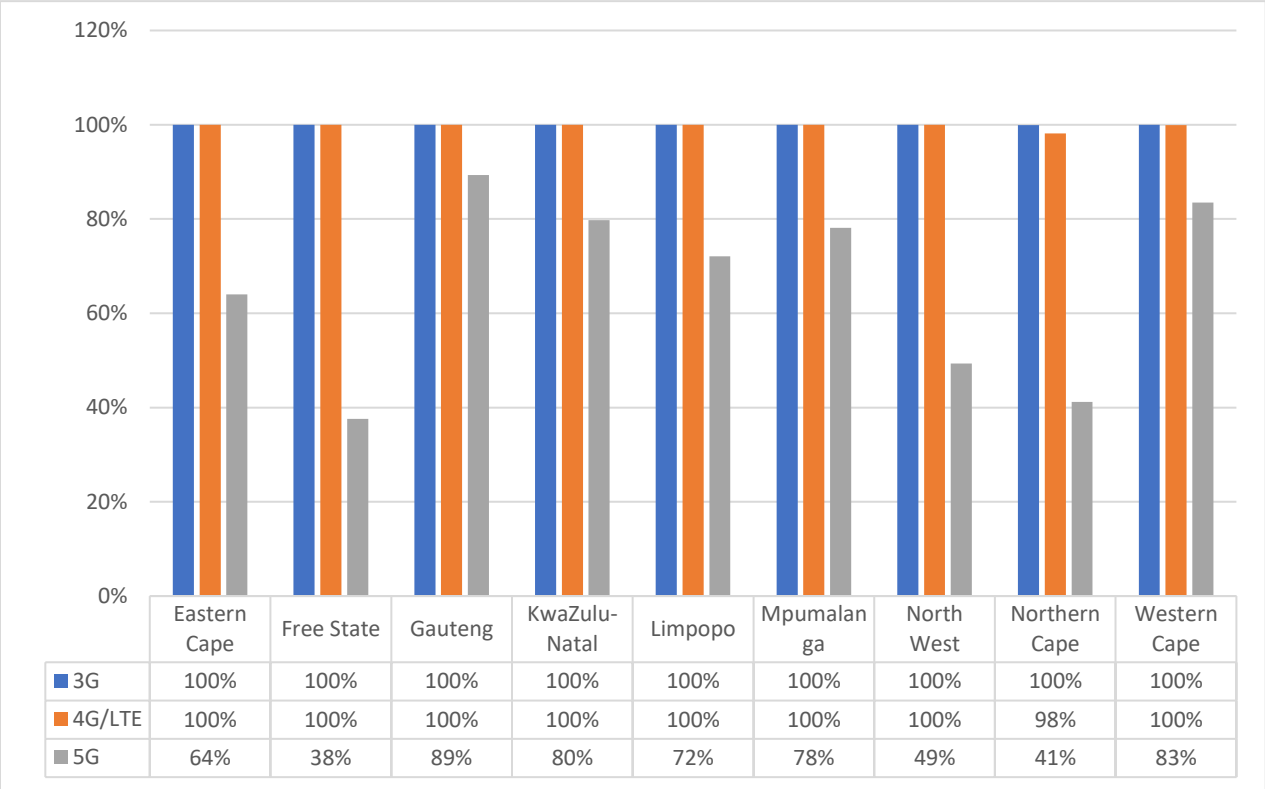
Source: ICASA Electronic Communications Questionnaire 2025.

[1] Percentage/ Total Numbers of the Rural population covered by at a mobile network refers to the percentage/Numbers of inhabitants that are within range of a mobile-cellular signal.

4.5.2 Urban Population Coverage

In 2025, mobile network coverage across South Africa showed strong growth. All provinces achieved between 98% and 100% coverage for both 3G and 4G/LTE networks, ensuring widespread connectivity nationwide. However, 5G coverage varied significantly between regions. The Western Cape led the country with the highest 5G coverage at 89%, reflecting strong urban network development. In contrast, the Free State recorded the lowest 5G coverage in urban areas, reaching only 38%, highlighting disparities in the rollout of next-generation networks.

Graph 24: Urban Population Covered per province in 2025.



	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpumalanga	North West	Northern Cape	Western Cape
3G	100%	100%	100%	100%	100%	100%	100%	100%	100%
4G/LTE	100%	100%	100%	100%	100%	100%	100%	98%	100%
5G	64%	38%	89%	80%	72%	78%	49%	41%	83%

Source: ICASA Electronic Communications Questionnaire 2025.

4.6 Mobile Cellular and Smartphone Subscriptions

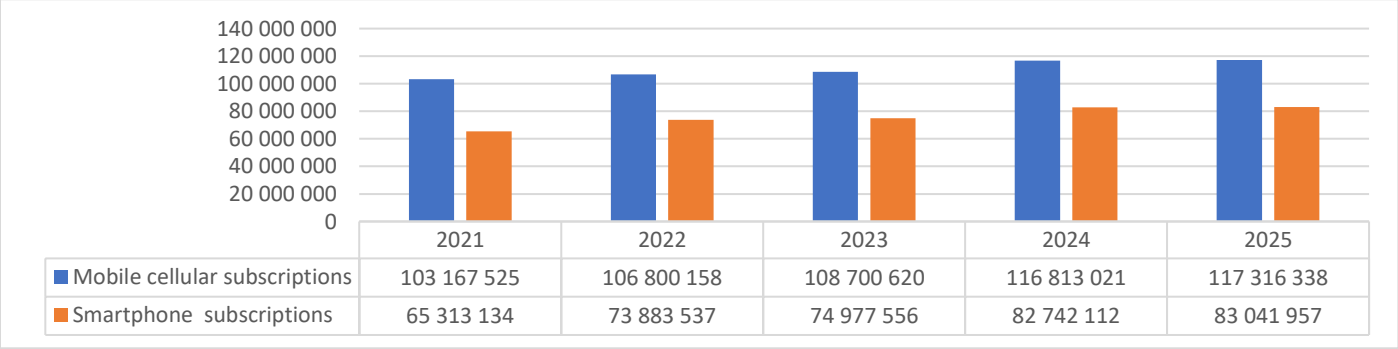
In 2025, South African service providers are offering a wide range of smartphones at competitive prices, catering to both prepaid and postpaid users. Entry-level models now start at just R399, providing an affordable option for many and making smartphone ownership increasingly accessible across the country.

At the other end of the spectrum, premium smartphones are available for up to R76,999. These high-end devices feature advanced technology and luxury designs, appealing to customers seeking the latest innovations. With such diverse options, consumers can choose a smartphone that fits both their budget and lifestyle, reflecting the growing accessibility of mobile technology in South Africa.

In 2025, both mobile cellular and smartphone subscriptions experienced modest growth. Mobile cellular subscriptions rose by 0.4%, while smartphone subscriptions increased by 0.4%. This slight upward trend reflects steady demand for mobile connectivity and smartphone usage.

In the last five years, the mobile cellular subscriptions increasing by 3.3%. Similarly, the smartphones have surged even further, with smartphone subscriptions increased by 6.2%.

Graph 25: Mobile Cellular and Smartphone Subscriptions, as of 30th September each year.



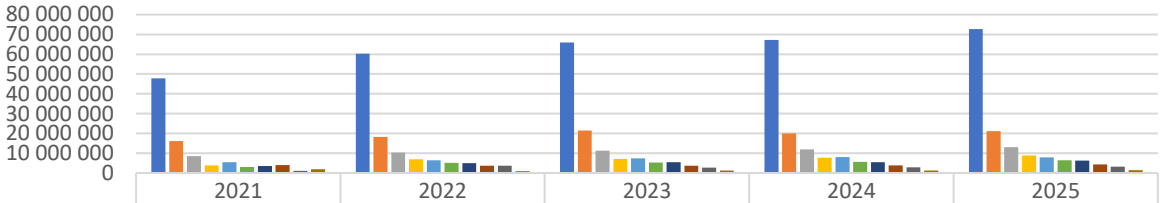
	2021	2022	2023	2024	2025
Mobile cellular subscriptions	103 167 525	106 800 158	108 700 620	116 813 021	117 316 338
Smartphone subscriptions	65 313 134	73 883 537	74 977 556	82 742 112	83 041 957

Source: ICASA Electronic Communications Questionnaire. 2021 – 2025.

4.6.1 Total Number of LTE Devices

In 2025, the total number of LTE devices increased from 67,177,006 in 2024 to 72,614,160 in 2025, a growth of 5,437,154, which is approximately 8.1%. Gauteng rises modestly by 5.3% (from 20,069,418 to 21,127,073), while KwaZulu-Natal grows 9.6%. Limpopo sees a notable increase of 13.1%, and Eastern Cape grows 14.2%, showing strong regional growth. Western Cape slightly decreases by 0.2%, while Mpumalanga rises 12.5%. North West increases 11.0%, Free State grows 13.9%, and Northern Cape rises 9.2%. Overall, most provinces show significant growth, reflecting national population expansion, with Western Cape being the only exception.

Graph 26: Total number of LTE Devices per Province in 2025.



	2021	2022	2023	2024	2025
National	47 731 522	60 300 324	65 954 030	67 177 006	72 614 160
Gauteng	16 181 205	18 235 958	21 490 161	20 069 418	21 127 073
KwaZulu-Natal	8 596 620	10 291 176	11 325 610	11 871 822	13 017 171
Limpopo	3 813 921	6 891 819	7 159 140	7 787 741	8 807 412
Western Cape	5 535 617	6 397 248	7 453 305	7 984 822	7 966 358
Mpumalanga	3 002 071	5 119 431	5 296 812	5 686 272	6 396 390
Eastern Cape	3 609 384	4 936 918	5 420 852	5 550 926	6 337 651
North West	3 937 994	3 708 422	3 730 132	3 922 533	4 354 304
Free State	1 125 608	3 651 558	2 771 568	2 838 499	3 233 172
Northern Cape	1 870 500	995 462	1 204 625	1 259 519	1 374 629

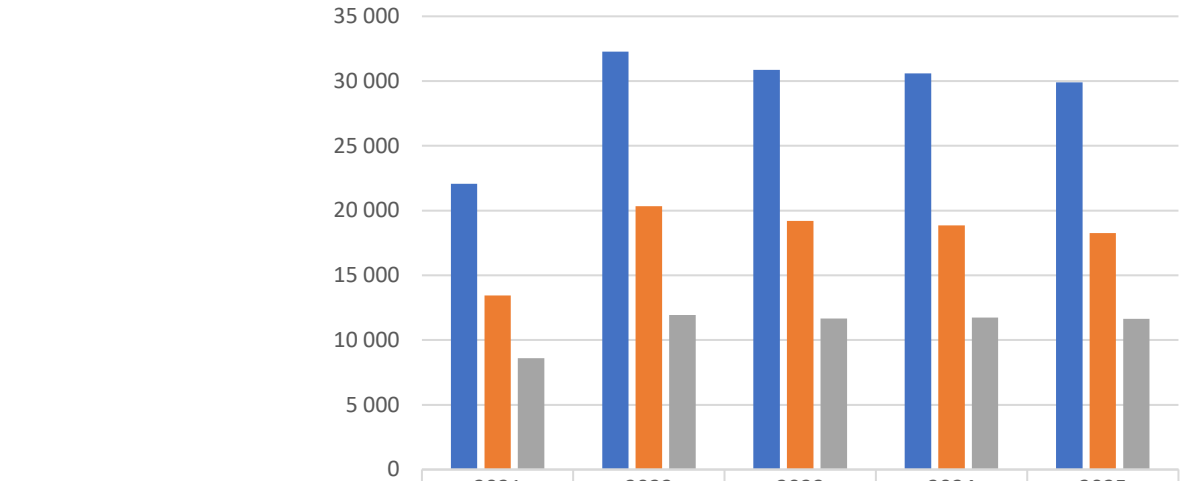
Source: ICASA Electronic Communications Questionnaire 2021 – 2025.

4.7 Persons Employed in the Telecommunications Sector

In 2025, total employment in the telecommunications sector declined by 2.3%. This overall reduction reflected a sharper decrease in male employment, which fell by 3.1%, compared to a smaller decline of 0.9% in female employment during the same period. The data indicate that while both genders experienced job losses, the impact was more pronounced among men, highlighting a gendered dimension in the sector's workforce contraction.

Over the five-year period from 2021 to 2025, total telecommunication employment increased by 7.9%. Male employment increased by 8.0%, while female employment increased over the same period.

Graph 27: Persons employed in the telecommunications sector, as of the 30th of September each year.



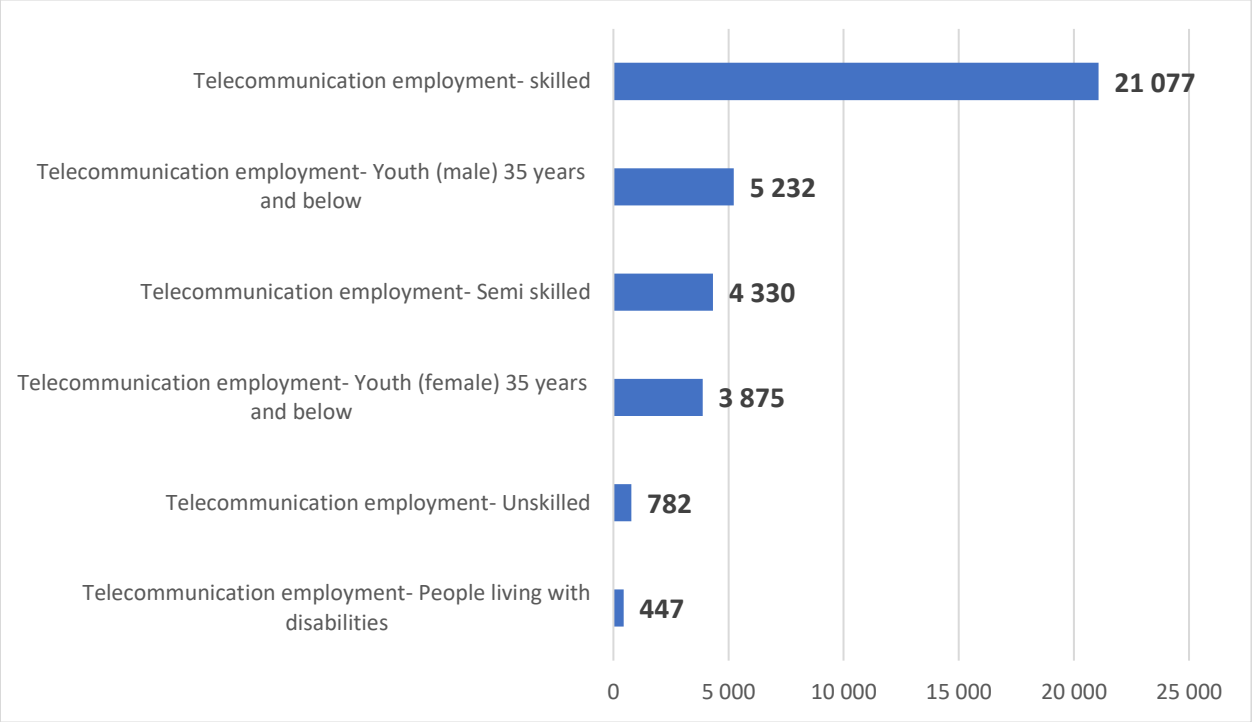
	2021	2022	2023	2024	2025
Telecommunication employment - Total	22 055	32 280	30 862	30 597	29 905
Telecommunication employment- male	13 452	20 337	19 197	18 860	18 272
Telecommunication employment- female	8 603	11 943	11 665	11 737	11 633

Source: ICASA Electronic Communications Questionnaire 2021 – 2025.

4.8 Persons Employed in the Telecommunications Sector Breakdown

In 2025, skilled workers form the largest group with 21,077 employees, highlighting the sector's reliance on experienced personnel. Following this, youth males (35 and below) account for 5,232, and semi-skilled workers number 4,330, showing a significant contribution from less experienced but trained staff. Youth females (35 and below) total 3,875, indicating a smaller but notable female youth presence. Unskilled workers are 782, reflecting limited entry-level positions. The smallest group is people living with disabilities, at 447.

Graph 28: Persons employed in the telecommunications sector breakdown from 2025.



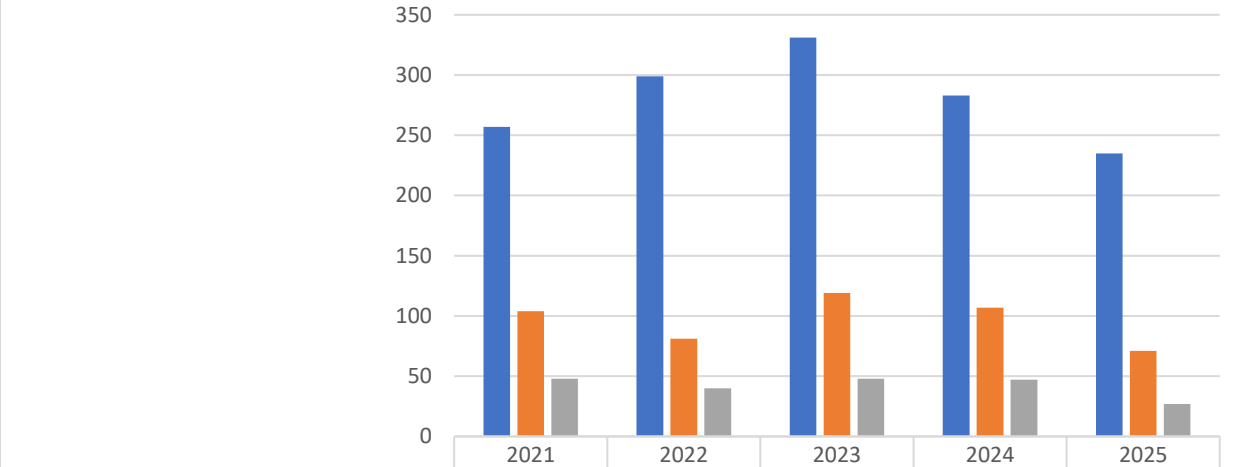
Source: ICASA Electronic Communications Questionnaire 2025.

4.9 Black Economic Empowerment Employment Measures

In 2025, overall top management employment fell by 17.0%. The representation of Black individuals in top management experienced a sharper decline of 33.6%. Meanwhile, Black women in top management faced an even more significant reduction, with numbers decreasing by 42.5%. These figures highlight a notable downward trend in both general and diversity-focused leadership roles, emphasizing the ongoing challenges in achieving equitable representation at the highest levels of management.

Over the five-year period, top management employment decreased by 2.2%. Black top management declined over the period, and Black top female management also declined.

Graph 29: Telecommunication Black Economic Empowerment Measures, for the 12-month period ending 30th September each year.



	2021	2022	2023	2024	2025
Telecoms employment- Top Management(EXCO Members)	257	299	331	283	235
Telecoms employment- Black Top Management(EXCO Members)	104	81	119	107	71
Telecoms employment- Black Top Female Management(EXCO Members)	48	40	48	47	27

Source: ICASA Electronic Communications Questionnaire 2021 – 2025.

4.10 Telecommunications Subscriptions

4.10.1 Mobile Cellular (Prepaid and Postpaid Mobile Cellular Phone Voice Subscriptions)

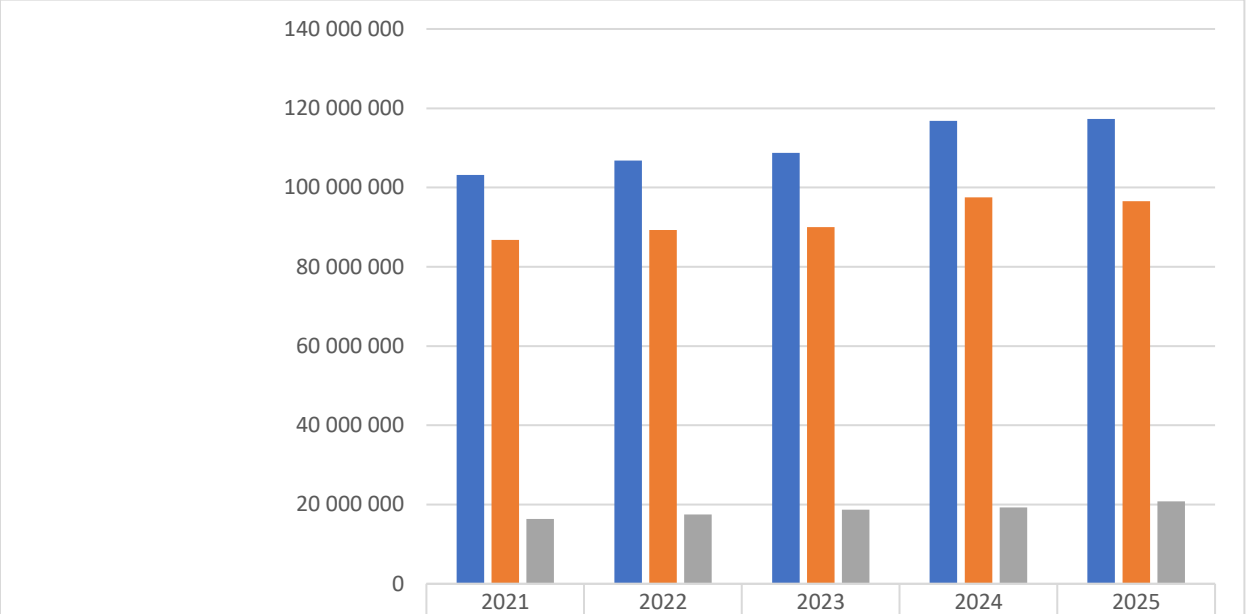
From 2024 to 2025, total mobile cellular subscriptions increased slightly by 0.4%, the overall mobile usage is still rising, but the growth rate is slowing compared to previous years. The small increase suggests the market is approaching saturation, meaning most people who can subscribe already have a mobile connection. This slight growth could be due to population increase, new users, or switching between networks. Overall, the mobile market remains stable, with incremental growth rather than rapid expansion.

In 2025, prepaid subscriptions decreased by approximately 1.0%. This drop indicates that some users may be shifting from prepaid plans to postpaid services, possibly for better features, convenience, or bundled services. The decline also reflects changing consumer behaviour, with fewer people relying on short-term prepaid options. Despite being the dominant type of subscription, the negative growth shows that prepaid services are no longer the primary driver of mobile expansion.

postpaid subscriptions grew from 19,307,445 in 2024 to 20,795,663 in 2025, an increase of 7.7%. This significant growth shows a clear trend of users moving from prepaid to postpaid plans, likely due to the benefits of fixed monthly plans, better data packages, and premium services. The faster growth of postpaid subscriptions compared to the total market indicates that postpaid users are becoming a larger proportion of mobile subscribers.

Over the five-year period from 2021 to 2025, the total number of mobile cellular subscriptions has increased by 3.3%. The prepaid subscriptions have seen a rise of 2.7%, suggesting a strong consumer shift towards more economical and flexible options. postpaid subscriptions, on the other hand, have experienced an even more significant growth rate of 6.2%.

Graph 30: prepaid and postpaid mobile cellular voice subscriptions, as of 30th September each year.



	2021	2022	2023	2024	2025
Total Mobile cellular subscriptions	103 167 525	106 800 158	108 700 620	116 813 021	117 316 338
Prepaid mobile-cellular telephone subscriptions	86 816 228	89 297 294	90 019 248	97 505 576	96 520 675
Postpaid mobile-cellular telephone subscriptions	16 351 297	17 502 864	18 681 372	19 307 445	20 795 663

Source: ICASA Electronic Communications Questionnaire 2021 – 2025.

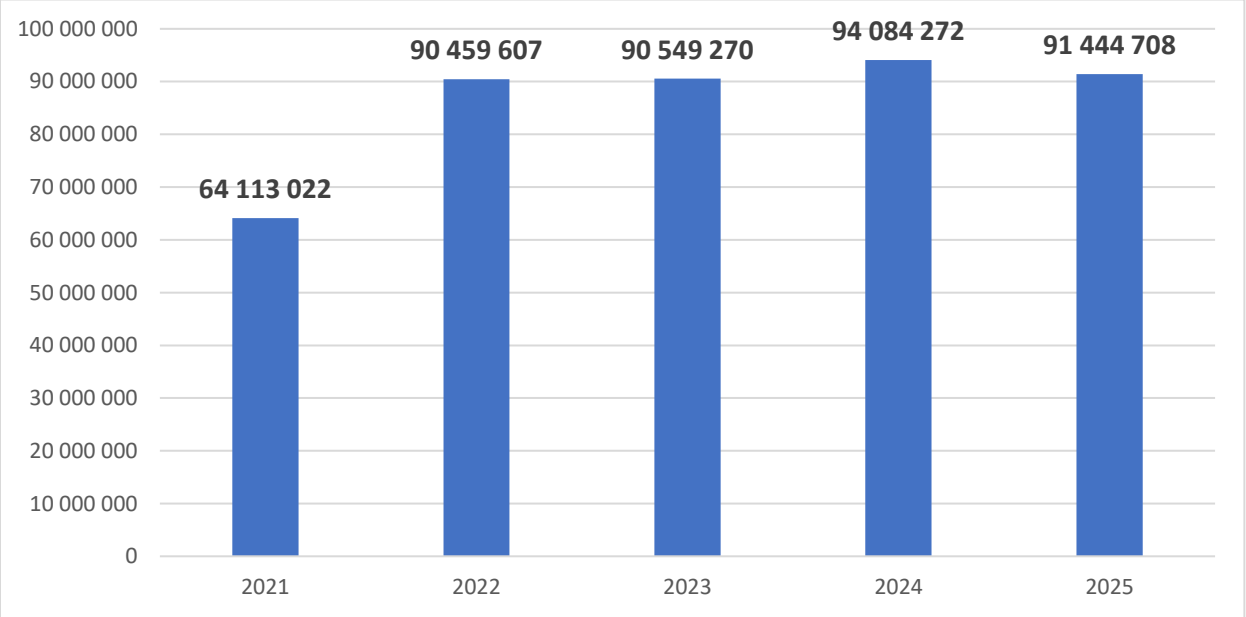
Note: The definition of prepaid subscribers is adopted from the ITU definition of 3-month active subscribers. Some South African operators do not have this metric available but rather count SIMs that have not been disconnected within a 90-day window implying that the number may be overstated according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

4.10.2 Mobile Cellular Active Subscriptions (Active for More Than 90 Days)

In 2025, South Africa experienced a decline in its mobile cellular market, with active subscriptions defined as those used for more than 90 days decreased by 2.8%. Despite this decline, mobile connectivity remains a critical part of everyday life, supporting communication, business, and access to digital services across the country. Analysts will likely monitor this trend closely to understand its long-term impact on the telecommunications sector and future growth opportunities.

Over 2021 – 2025, active subscriptions showed modest overall growth, supported by improved network infrastructure and increased smartphone adoption.

Graph 31: Mobile Cellular Active Subscriptions (Active for more than 90 Days), as of 30th September 2025.



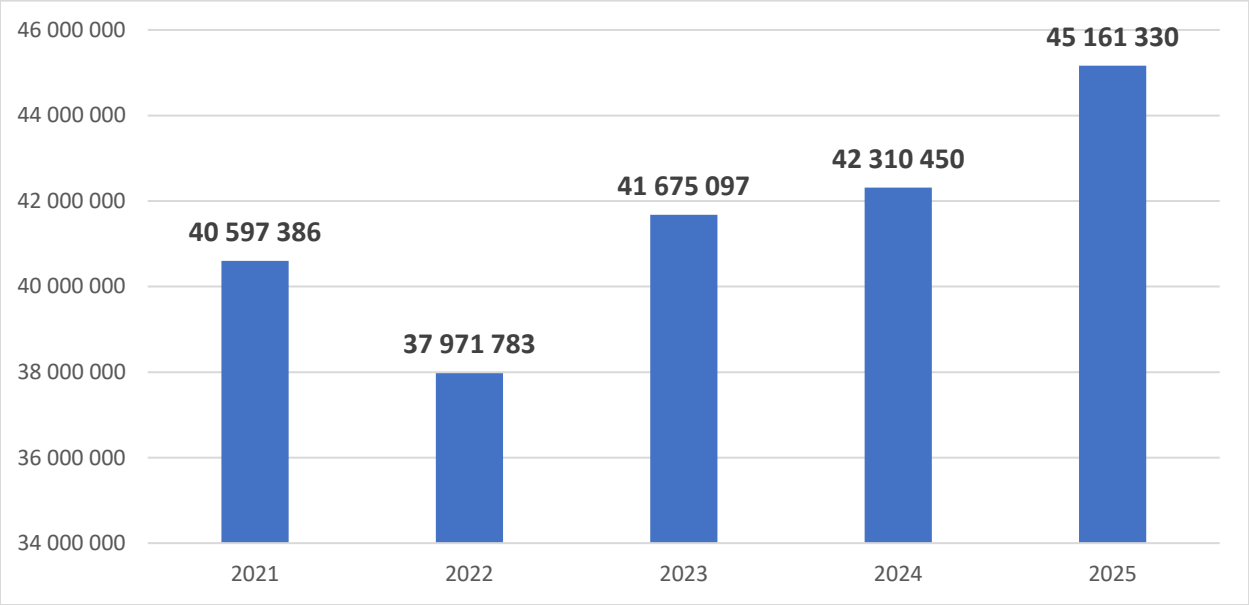
Source: ICASA Electronic Communications Questionnaire 2021 – 2025.

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 postpaid mobile cellular subscriptions.

4.10.3 Mobile Cellular Phone Data Subscriptions

The number of mobile cellular data subscriptions experienced a modest increase of 6.7%, rising from 42 million in 2024 to 45 million in 2025. This growth reflects a steady expansion in mobile connectivity, highlighting the continued adoption of mobile data services and the increasing reliance on digital communication across the population.

Graph 32: Mobile cellular phone data subscriptions, as of 30th September each year.



Source: ICASA Electronic Communications Questionnaire 2021 – 2025.

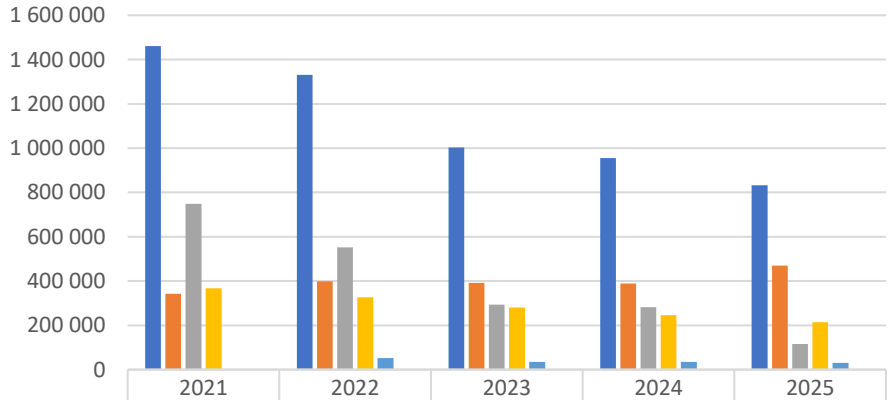
Note: All LTE connections are included in 'mobile'. There is room for the definition of 'mobile broadband subscriptions' to be improved in subsequent reports, noting that it was not possible to accurately distinguish between handset data usage and mobile data usage on other devices, or alternatively 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 on some players, especially those operating in unlicensed spectrum bands.

4.10.4 Fixed Line Voice Subscriptions

In 2025, the telecommunications landscape experienced notable shifts. Fixed-line subscriptions declined by 12.9%, reflecting a continued move away from traditional landline services. In contrast, Voice over Internet Protocol (VoIP) subscriptions saw a significant increase of 20.6%, highlighting the growing preference for internet-based communication solutions. Fixed wireless local loop subscriptions, however, recorded a slight decline of 13.1%, indicating modest reductions in this segment. These trends illustrate a broader industry transition toward digital and mobile communication technologies, as consumers and businesses increasingly adopt more flexible and cost-effective alternatives to conventional fixed-line services.

Over a five-year period, fixed-line subscriptions experienced a sharp decline, with a negative compound annual growth rate (CAGR) of 13.1%. In contrast, VoIP subscriptions grew by 8.2%, suggesting they are approaching a state of stagnation.

Graph 33: Fixed line subscriptions, as of 30th September each year.



	2021	2022	2023	2024	2025
Fixed line subscriptions	1 461 046	1 331 429	1 002 372	954 952	832 073
VoIP subscriptions	342 474	399 188	391 806	389 041	469 130
Analogue fixed-telephone lines	749 269	552 244	293 032	282 505	115 689
ISDN voice-channel equivalents	366 889	325 965	280 043	246 010	214 470
Fixed wireless local loop subscriptions	254	51 872	35 331	35 236	30 624
Fixed public payphone	2 160	2 160	2 160	2 160	2 160

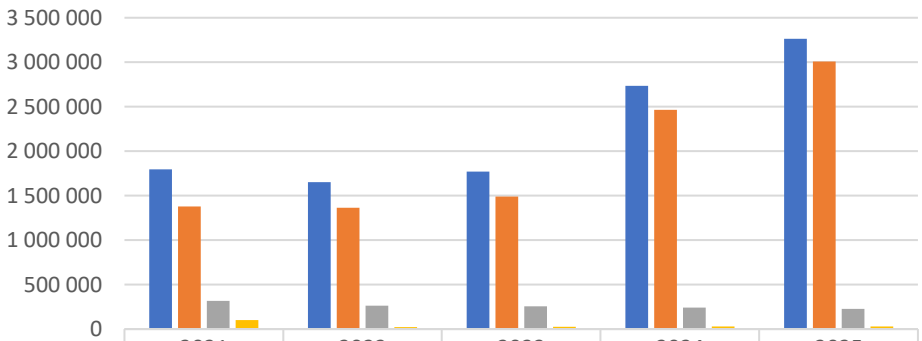
Source: ICASA Electronic Communications Questionnaire, December 2021 – 2025.

4.10.5 Fixed Line Broadband Subscriptions

In 2025, fixed broadband subscriptions increased by 19.3%, indicating continued strong expansion in the overall market. Fibre-to-the-home/building subscriptions grew by 22.0%, confirming that fibre remains the main driver of broadband growth and subscriber uptake. In contrast, DSL subscriptions declined by 6%, highlighting the ongoing shift away from legacy copper-based technologies. Other fixed (wired) broadband subscriptions recorded moderate growth of 5.1%, suggesting limited but positive momentum within this smaller segment compared to the strong performance of fibre services.

The five-year compound annual growth rate (CAGR) shows the average annual growth trend from 2021 to 2025. Fixed broadband subscriptions achieved a strong CAGR of 16.1%, reflecting sustained medium-term expansion. Fibre subscriptions recorded the highest CAGR at 21.5%, highlighting consistent and rapid adoption over the period. Conversely, DSL subscriptions experienced a negative CAGR of -8.0%, indicating steady long-term decline. Other fixed (wired) broadband subscriptions show a significant negative CAGR of -26.0%, suggesting that despite slight recent growth, the category has contracted substantially over the full five-year period.

Graph 34: Fixed broadband subscriptions, as of 30th September each year.



	2021	2022	2023	2024	2025
Fixed broadband subscriptions	1 796 364	1 652 380	1 770 846	2 735 968	3 264 271
Fibre-to-the-home/building Internet subscriptions	1 379 207	1 365 429	1 488 483	2 465 453	3 006 836
DSL Internet subscriptions	316 825	264 241	255 223	241 947	227 420
Other fixed (wired)-broadband subscriptions	100 332	22 710	27 140	28 568	30 015

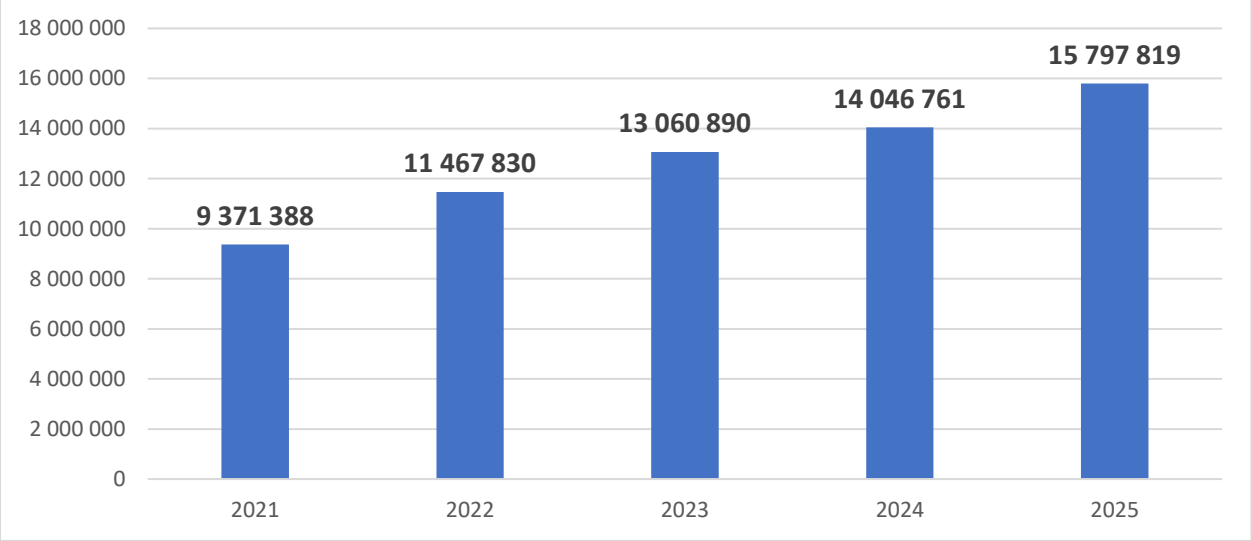
Source: ICASA Electronic Communications Questionnaire 2021 – 2025.

4.10.6 Machine-To-Machine (‘’M2M’’) Mobile Subscriptions

The M2M mobile network subscriptions experienced significant growth in 2025, increasing by 12.5%. The number of subscriptions rose from 14 million in 2024 to 15.7 million in 2025. This notable increase reflects the expanding adoption of connected devices and the growing demand for automated communication technologies across industries.

Over five years, M2M mobile-network subscriptions experienced a robust compound annual growth rate (CAGR) of 13.9%, reflecting strong and consistent growth in the sector. The rise in subscriptions indicates a rapid increase in demand for M2M connectivity, driven by the growing integration of Internet of Things (“IoT”) across various industries.

Graph 35: M2M mobile-network subscriptions, as of 30th September each year.



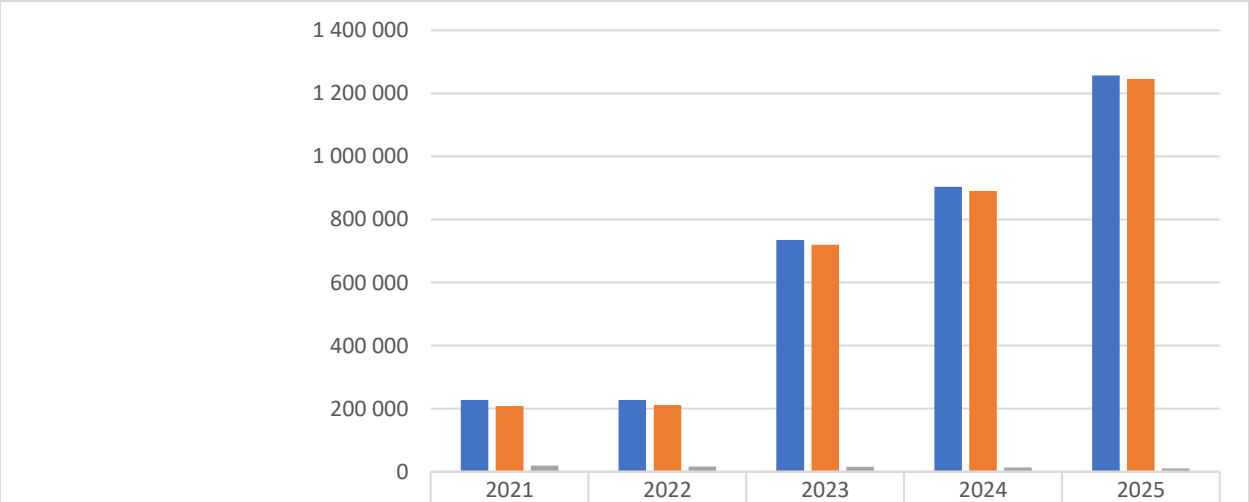
Source: ICASA Electronic Communications Questionnaire 2021 – 2025.

4.10.7 Wireless-Broadband Subscriptions

From 2024 to 2025, total wireless-broadband subscriptions increased significantly from 903,784 to 1,256,359, reflecting strong market growth. Terrestrial fixed wireless broadband subscriptions drove this rise, climbing from 890,117 to 1,245,762. In contrast, satellite broadband subscriptions continued to decline, falling from 13,667 in 2024 to 10,597 in 2025, indicating a shift in consumer preference toward terrestrial fixed wireless solutions.

Over the five-year period from 2021 to 2025, total wireless-broadband subscriptions grew dramatically from 227,840 to 1,256,359. Terrestrial fixed wireless broadband subscriptions showed substantial expansion, rising from 208,152 in 2021 to 1,245,762 in 2025. Meanwhile, satellite broadband subscriptions steadily decreased from 19,688 to 10,597, highlighting a consistent decline in satellite services as fixed wireless technologies expanded rapidly.

Graph 36: Wireless-broadband subscriptions, as of 30th September each year.



	2021	2022	2023	2024	2025
Total Wireless-broadband subscriptions	227 840	227 382	735 074	903 784	1 256 359
Terrestrial fixed wireless broadband subscriptions	208 152	210 984	719 347	890 117	1 245 762
Satellite broadband subscriptions	19 688	16 398	15 727	13 667	10 597

Source: ICASA Electronic Communications Questionnaire 2021 – 2025.

4.11 Network Traffic

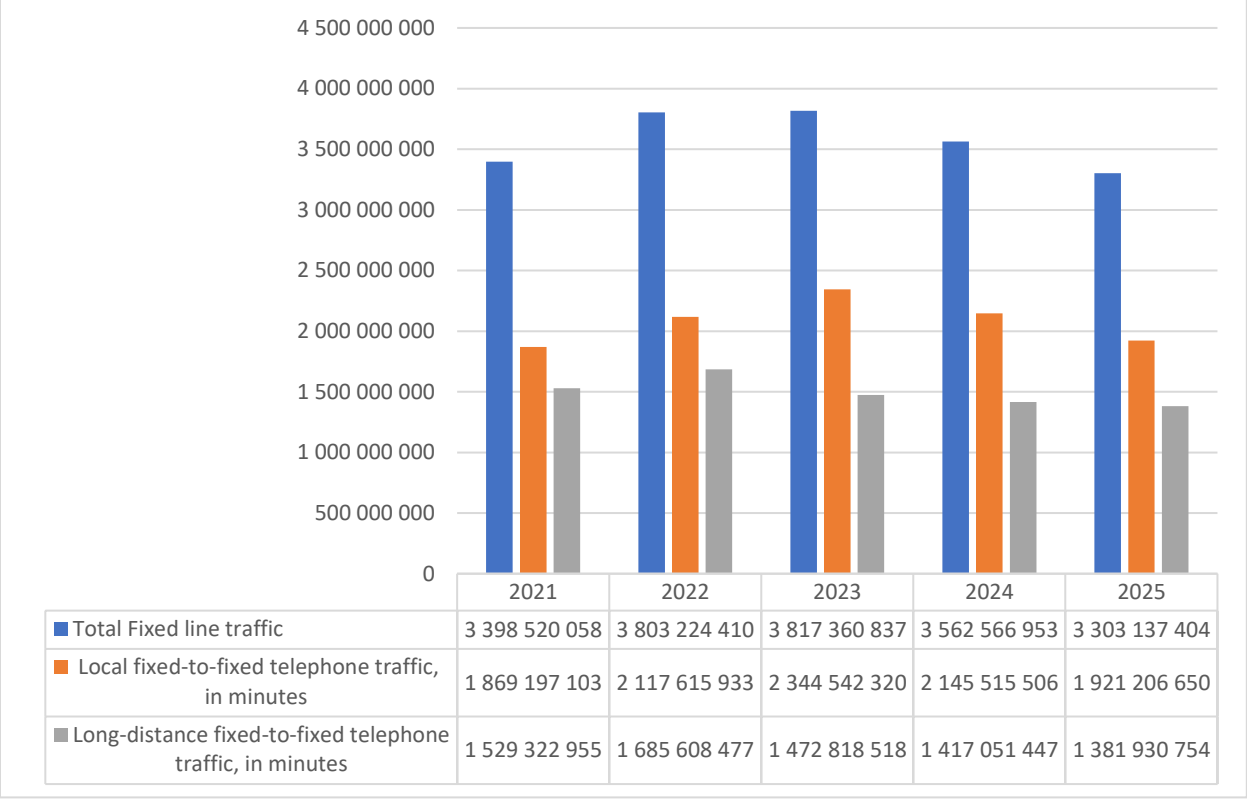
Monitoring network traffic from fixed to mobile networks is increasingly important in 2025 as communication patterns continue to shift toward mobile-first usage. With the widespread adoption of smartphones, 4G and 5G technologies, and data-intensive applications, a growing proportion of voice and data traffic is being initiated or terminated on mobile networks, even when supported by fixed broadband infrastructure. Analysing traffic flows between fixed and mobile networks enables operators and regulators to understand substitution trends, interconnection dynamics, and evolving consumer preferences. This insight is critical for ensuring balanced investment across network segments, maintaining fair interconnection arrangements, and supporting seamless communication across platforms.

Furthermore, understanding fixed-to-mobile traffic trends plays a vital role in infrastructure planning, spectrum management, and service quality improvement. As households and businesses increasingly rely on mobile connectivity for voice, messaging, and internet services, operators must anticipate capacity demands and optimise backhaul and core network resources accordingly. Detailed traffic analysis also supports the development of converged service offerings, such as fixed–mobile bundles, and informs regulatory decisions related to competition and pricing. Ultimately, tracking the flow of traffic between fixed and mobile networks strengthens the overall resilience, efficiency, and inclusiveness of the national ICT ecosystem in an increasingly mobile-driven digital economy.

4.11.1 Fixed Line Traffic

In 2025, the overall volume of fixed-line traffic declined by 7.3%. This drop was mainly due to a significant 10.4% decrease in local fixed-to-fixed telephone traffic, reflecting a notable shift in user communication preferences toward alternative connectivity methods. Long-distance fixed-to-fixed telephone traffic also fell, though more modestly, by 2.5%.

Graph 37: Fixed line traffic, in minutes, for the 12-month period ending 30th September each year.



	2021	2022	2023	2024	2025
Total Fixed line traffic	3 398 520 058	3 803 224 410	3 817 360 837	3 562 566 953	3 303 137 404
Local fixed-to-fixed telephone traffic, in minutes	1 869 197 103	2 117 615 933	2 344 542 320	2 145 515 506	1 921 206 650
Long-distance fixed-to-fixed telephone traffic, in minutes	1 529 322 955	1 685 608 477	1 472 818 518	1 417 051 447	1 381 930 754

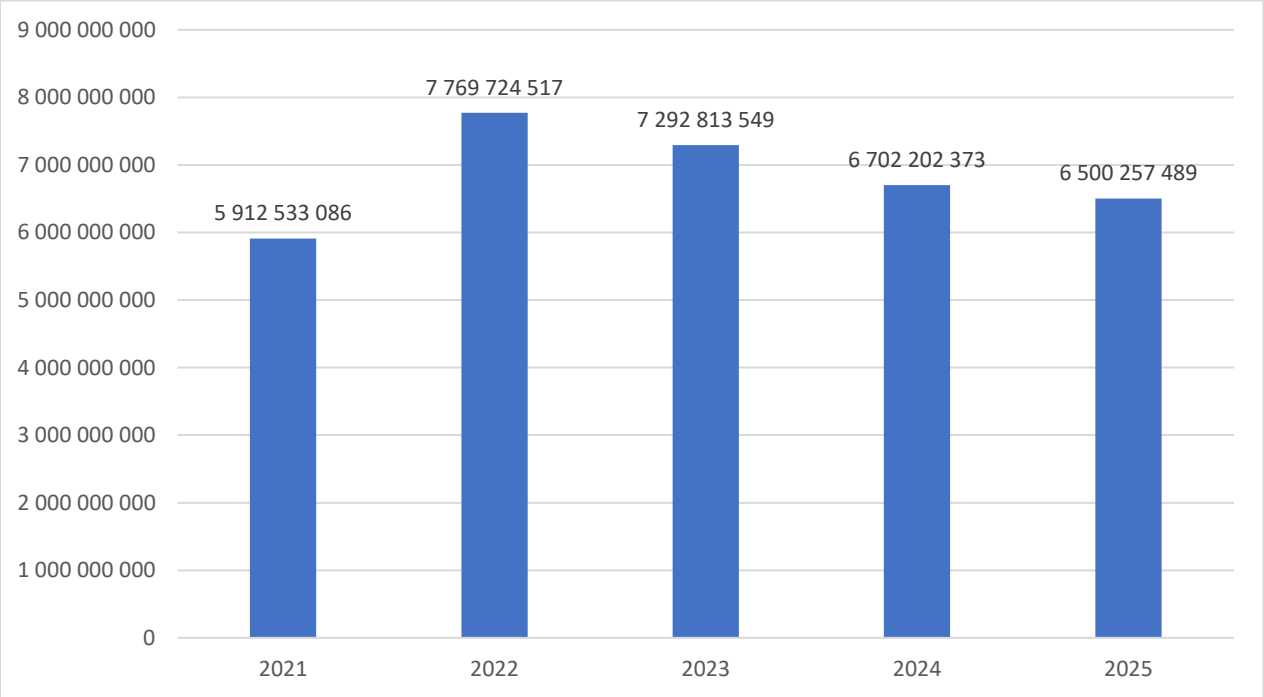
Source: ICASA Electronic Communications Questionnaire 2021 – 2025.

4.11.2 Fixed-To-Mobile Telephone Traffic

In 2025, the volume of fixed-to-mobile telephone calls experienced a decline of 3.0%. This decrease reflects a shift in communication patterns, possibly influenced by the growing adoption of alternative technologies such as mobile apps and internet-based messaging.

Over the past five years, total fixed-to-mobile call traffic has grown by 2.4%. This gradual increase indicates a steady demand for such communication services, reflecting consistent usage patterns despite the rise of alternative digital messaging platforms.

Graph 38: Fixed-to-mobile telephone traffic minutes, for the 12-month period ending 30th September each year.



Source: ICASA Electronic Communications Questionnaire 2021 – 2025.

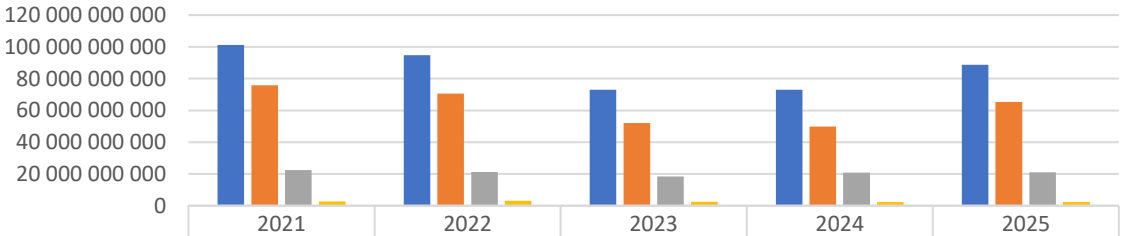
One operator changed the 2023 figure

4.11.3 Total National Mobile Traffic (Minutes)

In 2025, national mobile traffic experienced significant growth, increasing by 21.5% compared to the previous year. Outgoing mobile traffic saw an even larger rise of 31.2%, reflecting a strong surge in user activity. Traffic between mobile networks also recorded a modest increase of 1.2%, indicating stable inter-network communication. However, mobile-to-fixed-line traffic declined by 4.6%, suggesting a shift in user preference away from traditional fixed-line calls. Overall, the data highlights a continued expansion in mobile usage, driven primarily by outgoing and inter-network calls, while fixed-line communication continues to experience a gradual decline.

The total national mobile traffic over the past five years reveals an overall negative compound annual growth rate (CAGR) of 3.2%. Outgoing traffic within the same mobile network declined at a CAGR of 1.7%, underscoring the ongoing challenge for operators in retaining their customer base. In contrast, mobile-to-fixed traffic decline at a CAGR of 4.6%, indicating a decreasing preference for landline connections over time. Meanwhile, calls to other mobile networks experienced a modest decline, with a CAGR of 3.7%, reflecting steady demand for inter-network communication despite the overall decrease in traffic.

Graph 39: Mobile voice traffic in minutes for the 12-month period ending 30th September each year.



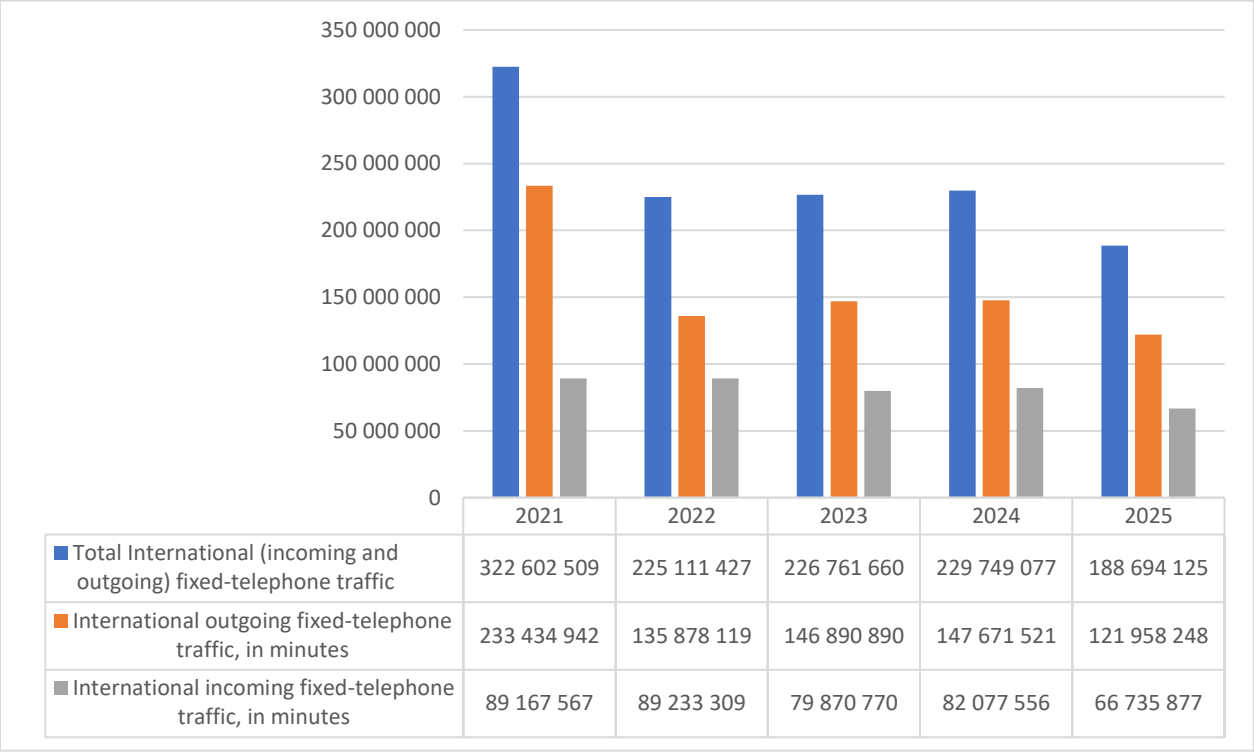
	2021	2022	2023	2024	2025
Total national mobile traffic	101 149 515 339	94 798 336 472	73 070 567 372	72 956 528 258	88 631 886 709
Outgoing mobile traffic to same mobile network	75 931 467 737	70 514 344 403	52 139 235 727	49 830 160 256	65 361 910 449
Mobile to other mobile networks	22 530 502 389	21 252 615 562	18 386 622 908	20 794 202 484	21 045 637 809
Mobile to fixed	2 687 545 213	3 031 376 507	2 544 708 737	2 332 165 518	2 224 338 451

Source: ICASA Electronic Communications Questionnaire 2021 – 2025.

4.11.4 International Incoming and Outgoing Fixed Telephone Traffic

The total volume of international fixed-telephone traffic, encompassing both incoming and outgoing calls decrease, from 229 million minutes in 2024 to 188 million minutes in 2025.

Graph 40: International fixed line traffic in minutes (million) for the 12-month period ending 30th September each year.



	2021	2022	2023	2024	2025
Total International (incoming and outgoing) fixed-telephone traffic	322 602 509	225 111 427	226 761 660	229 749 077	188 694 125
International outgoing fixed-telephone traffic, in minutes	233 434 942	135 878 119	146 890 890	147 671 521	121 958 248
International incoming fixed-telephone traffic, in minutes	89 167 567	89 233 309	79 870 770	82 077 556	66 735 877

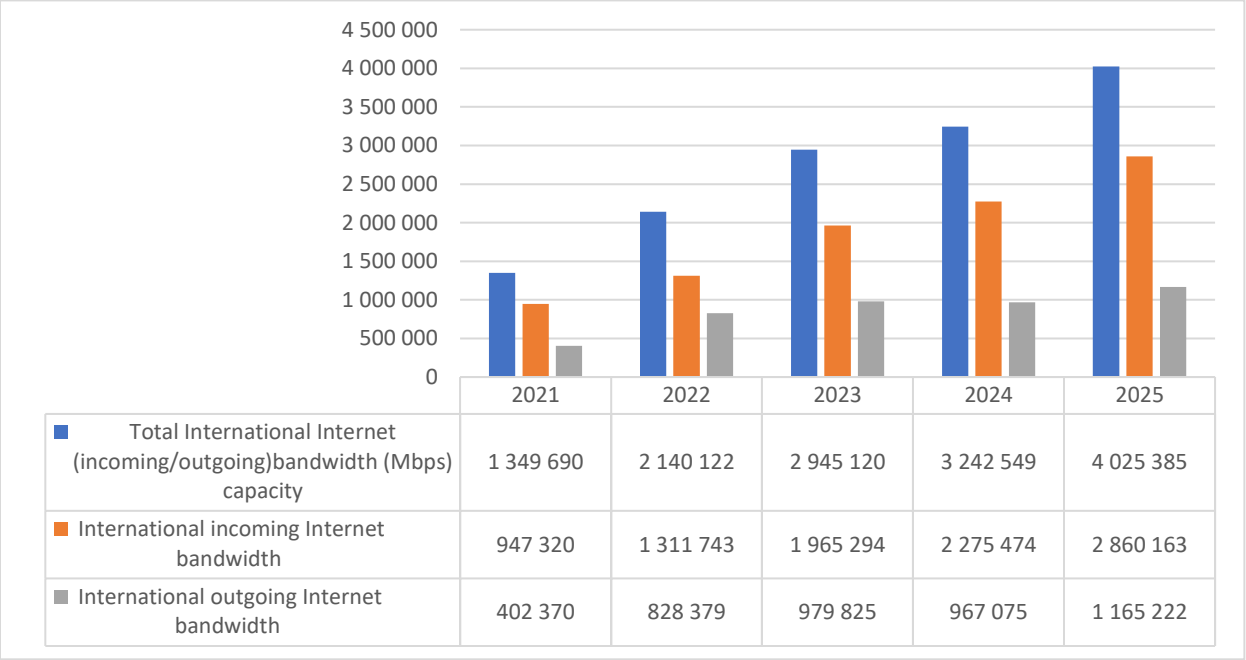
Source: ICASA Electronic Communications Questionnaire 2021 – 2025.

4.12 International Internet Bandwidth Capacity in Megabits Per Second ("Mbps")

In 2025, the total capacity of international internet bandwidth saw a substantial increase of 24.1%. The most significant growth was observed in international incoming internet bandwidth, which rose by 25.7%, reflecting a strong demand for data entering the country. In comparison, international outgoing internet bandwidth grew at a slightly slower pace, increasing by 20.5%. This divergence indicates that while both incoming and outgoing data traffic expanded, the influx of international data outpaced the outflow.

From 2021 to 2025, the total international internet bandwidth capacity grew at a compound annual growth rate (CAGR) of 31.4%. During the same period, international incoming bandwidth increased at a CAGR of 31.8%, while outgoing bandwidth grew at a CAGR of 30.4%.

Graph 41: International internet bandwidth Megabits per second (Mbps) for the 12-month period ending 30th of September each year.



	2021	2022	2023	2024	2025
Total International Internet (incoming/outgoing)bandwidth (Mbps) capacity	1 349 690	2 140 122	2 945 120	3 242 549	4 025 385
International incoming Internet bandwidth	947 320	1 311 743	1 965 294	2 275 474	2 860 163
International outgoing Internet bandwidth	402 370	828 379	979 825	967 075	1 165 222

Source: ICASA Electronic Communications Questionnaire 2021 – 2025.

4.13 Comparison Of Internet Speeds Global

The Speedtest Global Index by OOKLA's Speedtest Intelligence ranks countries, including South Africa, based on their internet speeds for mobile and fixed broadband. Its purpose is to provide insights into the nation's broadband performance, track technological progress, and benchmark connectivity against global standards.

The Speedtest Global Index measures fixed broadband rankings primarily using download and upload speeds from real user tests. Each month, millions of tests from desktops, laptops, and fixed networks are aggregated. The download speed how fast data is received is weighted more heavily than upload speed, but both affect the final score. Tests are filtered to remove outliers and ensure accuracy. The global index calculates the average speed per country and ranks them accordingly. Latency (ping) is not included in the main ranking, but it is reported separately. Only tests conducted on fixed connections (fibre, DSL, cable, etc.) are counted. The ranking reflects overall infrastructure performance, showing which countries offer the fastest fixed internet.

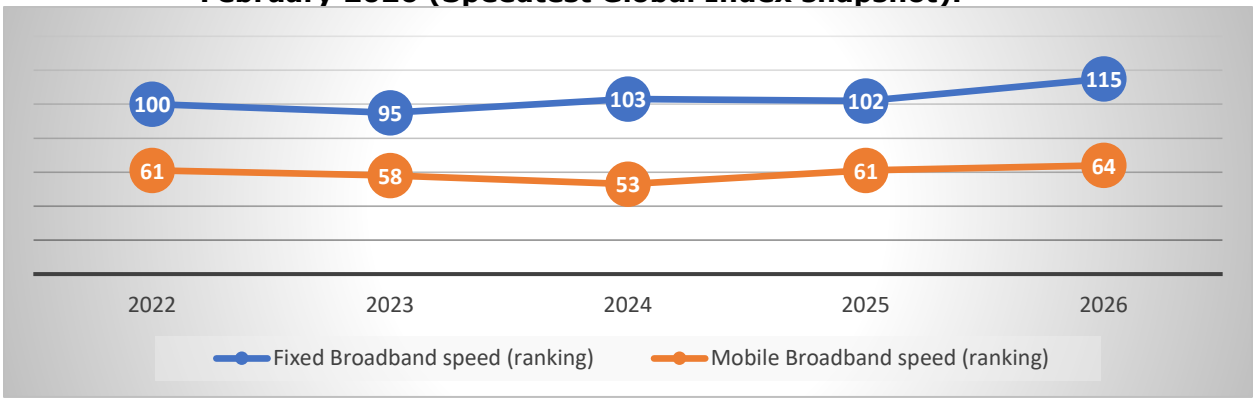
The mobile ranking works similarly but focuses on tests conducted on cellular networks (3G, 4G, and 5G). Both download and upload speeds are included, again with download given more weight. Data is collected from smartphones and tablets worldwide. The average mobile speed per country is calculated from these millions of tests, filtering out anomalies caused by weak signals or unusual network conditions. Mobile rankings highlight how well carriers provide fast, reliable connections for everyday apps and browsing. Unlike fixed broadband, mobile speeds can fluctuate greatly depending on location, network congestion, and signal quality, so the index reflects typical user experience rather than theoretical maximum speeds. The index is updated monthly, giving a dynamic snapshot of global mobile internet performance.

4.13.1 South Africa Global Ranking for Mobile and Fixed Speed

South Africa's fixed broadband ranking declined from 102nd in 2025 to 115th in 2026 out of 152 countries. This downward shift of 13 places indicates a loss of competitive position globally. Being ranked 115th places the country in the lower third of global performance, suggesting slower improvement compared to other nations. While infrastructure expansion may still be occurring domestically, other countries are progressing at a faster rate in speed, coverage, and quality. The trend suggests structural challenges such as infrastructure investment gaps, affordability issues, or rollout inefficiencies that may be limiting South Africa's advancement in fixed broadband performance.

In mobile broadband, South Africa moved from 61st in 2025 to 64th in 2026 out of 103 countries. Although the drop is smaller than in fixed broadband, it still reflects a slight weakening in global competitiveness. Ranking 64th places the country in the lower-middle segment internationally. This suggests that while mobile networks remain relatively stronger than fixed broadband, improvements are not keeping pace with faster-growing markets. The shift may point to spectrum, infrastructure density, or pricing competitiveness challenges. Overall, the 2026 ranking indicates a need for accelerated mobile network investment and performance optimization to regain upward momentum globally.

Graph 42: Ookla Speedtest rankings and speeds in this section are frozen as of February 2026 (Speedtest Global Index snapshot).



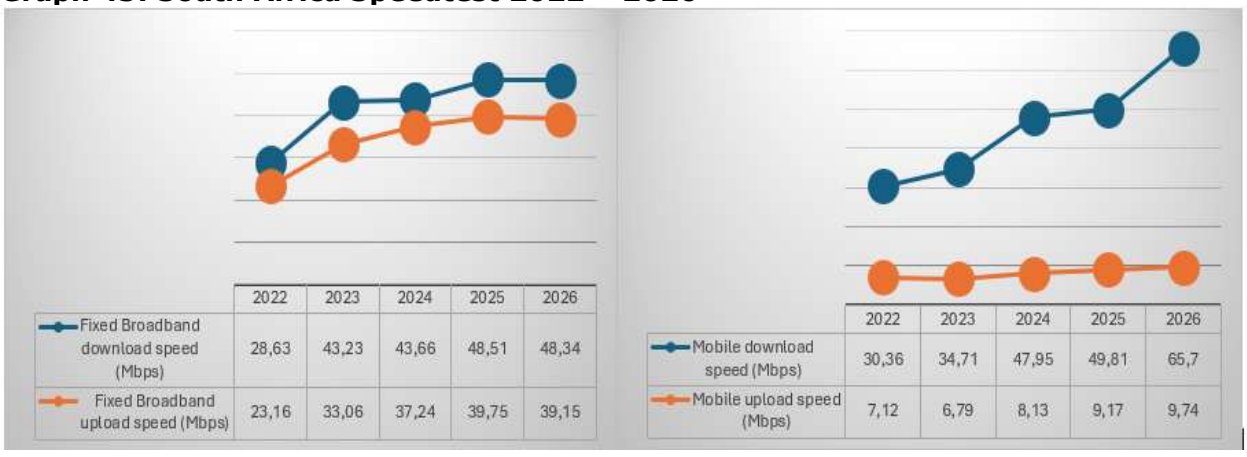
Source: OOKLA, Speedtest intelligence 2022 – 2026.

4.13.2 South Africa Fixed and Mobile Upload and Download Speeds.

South Africa's fixed broadband download speeds have steadily risen from 28.63 Mbps in 2022 to 48.34 Mbps in 2026, while upload speeds climbed from 23.16 Mbps to 39.15 Mbps. This improvement is largely driven by investments in fibre-to-the-home/building (FTTH) networks by licensed providers. Urban areas benefit most from these upgrades, though rural and peri-urban regions often rely on older copper or wireless infrastructure. Power instability and load shedding also impact network performance. While still below top global speeds, the trend shows South Africa steadily narrowing the gap, especially as more areas gain access to high-capacity networks.

Mobile broadband download speeds grew even faster, from 30.36 Mbps in 2022 to 65.7 Mbps in 2026, with uploads rising from 7.12 Mbps to 9.74 Mbps. The rollout of 5G and enhanced 4G/LTE networks by licensed operators drives this growth. Mobile networks prioritize download capacity due to high demand for streaming, gaming, and remote work, which explains the slower upload increase. Spectrum limitations, economic factors, and infrastructure costs continue to influence speed improvements, highlighting the need for sustained investment to compete globally.

Graph 43: South Africa Speedtest 2022 – 2026



	2022	2023	2024	2025	2026
Fixed Broadband download speed (Mbps)	28,63	43,23	43,66	48,51	48,34
Fixed Broadband upload speed (Mbps)	23,16	33,06	37,24	39,75	39,15

	2022	2023	2024	2025	2026
Mobile download speed (Mbps)	30,36	34,71	47,95	49,81	65,7
Mobile upload speed (Mbps)	7,12	6,79	8,13	9,17	9,74

Source: OOKLA, Speedtest intelligence 2022 – 2026.

4.13.3 BRICS Speedtest

In February 2026, fixed broadband, Brazil and China lead among the listed countries with rankings of 26 and 27, respectively, indicating relatively strong broadband infrastructure. Russia falls in the middle at 79, showing moderate connectivity, while India and South Africa lag significantly with rankings of 102 and 115, highlighting challenges in broadband access and quality. These rankings reflect disparities in investment, infrastructure development, and technology adoption, with Brazil and China benefiting from more advanced networks and South Africa and India facing slower rollout and limited coverage in certain regions, affecting overall connectivity and user experience.

In February 2026, mobile broadband, Brazil again performs best with a ranking of 6, reflecting robust mobile network performance and widespread 4G/5G availability. China follows at 19, still strong but slightly behind Brazil. India and South Africa are mid-tier at 34 and 64, suggesting growing but uneven mobile network development. Russia ranks lowest at 82, indicating mobile broadband lags compared to other countries. Overall, the rankings show that mobile networks generally outperform fixed broadband in speed accessibility for many users, but disparities persist, influenced by investment, technology deployment, and geographic challenges.

Table 2: BRICS Speedtest 2026

Fixed Broadband					
	Brazil	**China**	**Russia**	**India**	**South Africa**
Fixed Broadband speed (ranking)	26	27	79	102	115
Fixed Broadband download speed (Mbps)	222.06	221.37	91.39	61.55	48.34
Fixed Broadband upload speed (Mbps)	118.19	47.85	92.87	59.02	39.15
Mobile Broadband					
	Brazil	**China**	**India**	**South Africa**	**Russia**
Mobile Broadband speed (ranking)	6	19	34	64	82
Mobile download speed (Mbps)	260.23	163.88	132	65.7	44.92
Mobile upload speed (Mbps)	18.82	28.97	11.66	9.74	10.51

Source: OOKLA, Speedtest intelligence 2026.

4.14 International Comparison of South Africa's ICT Development Index ("IDI") Ranking Scores.

Comparing South Africa with BRICS countries (Brazil, Russia, India, China, and South Africa) in the ICT Development Index ("IDI") is essential for benchmarking its digital progress and identifying areas of improvement. The IDI, developed by the ITU, measures the extent to which connectivity is universal and meaningful. It comprises of ten indicators grouped into two pillars: Universal and Meaningful Connectivity ("UMC").

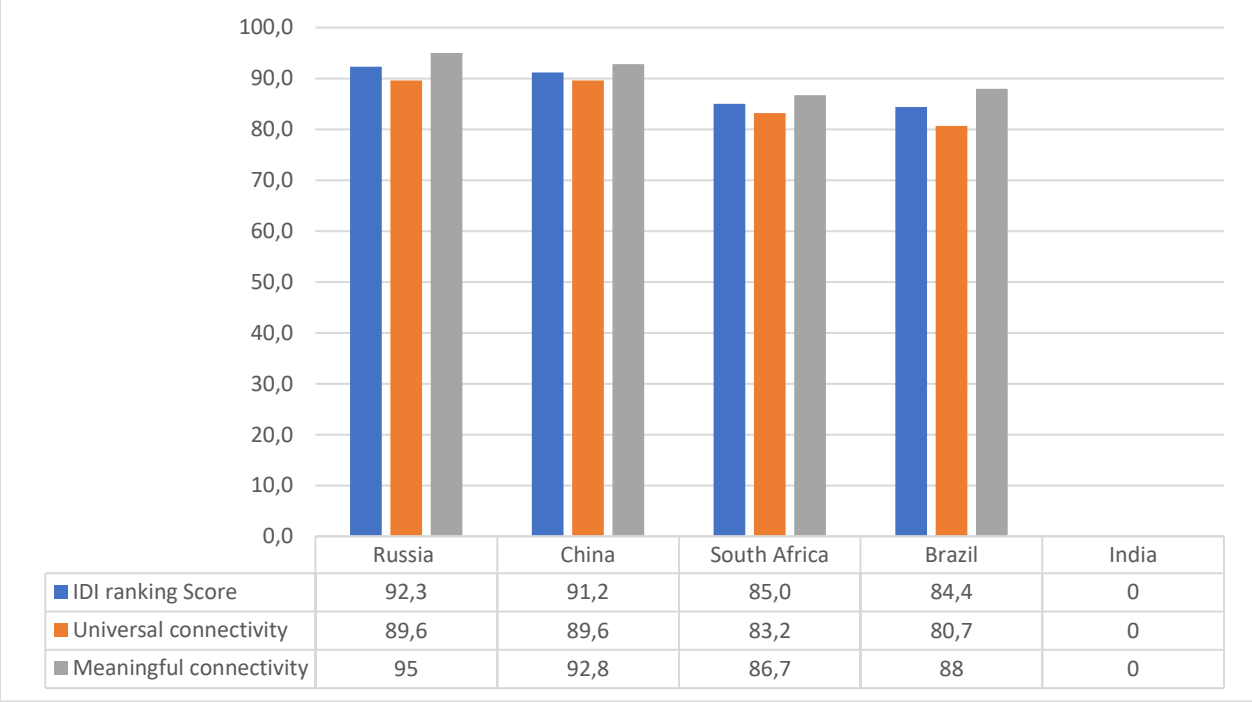
Comparing South Africa's IDI ranking against its BRICS counterparts helps policymakers assess how effectively the country is bridging the digital divide and adopting technological advancements.

Given that BRICS nations have similar developmental goals, this comparison provides insights for enhancing connectivity infrastructure and increasing broadband penetration.

4.14.1 BRICS IDI Ranking Scores.

According to the ITU ranking scores reflects a country's overall level of digital development. Based on the scores, Russia leads with 92.3, indicating strong digital infrastructure and effective use of ICT. China follows closely at 91.2, showing rapid digital growth and widespread connectivity. South Africa scores 85.0, reflecting moderate digital development with room for improvement in ICT adoption. Brazil, at 84.4, demonstrates similar trends but slightly behind South Africa in digital maturity. India's IDI score is not available, preventing a direct comparison, though other sources suggest a developing digital landscape. High scores correspond to better national ICT capabilities and services.

Graph 44: South Africa IDI ranking score compared to BRICS countries 2025.



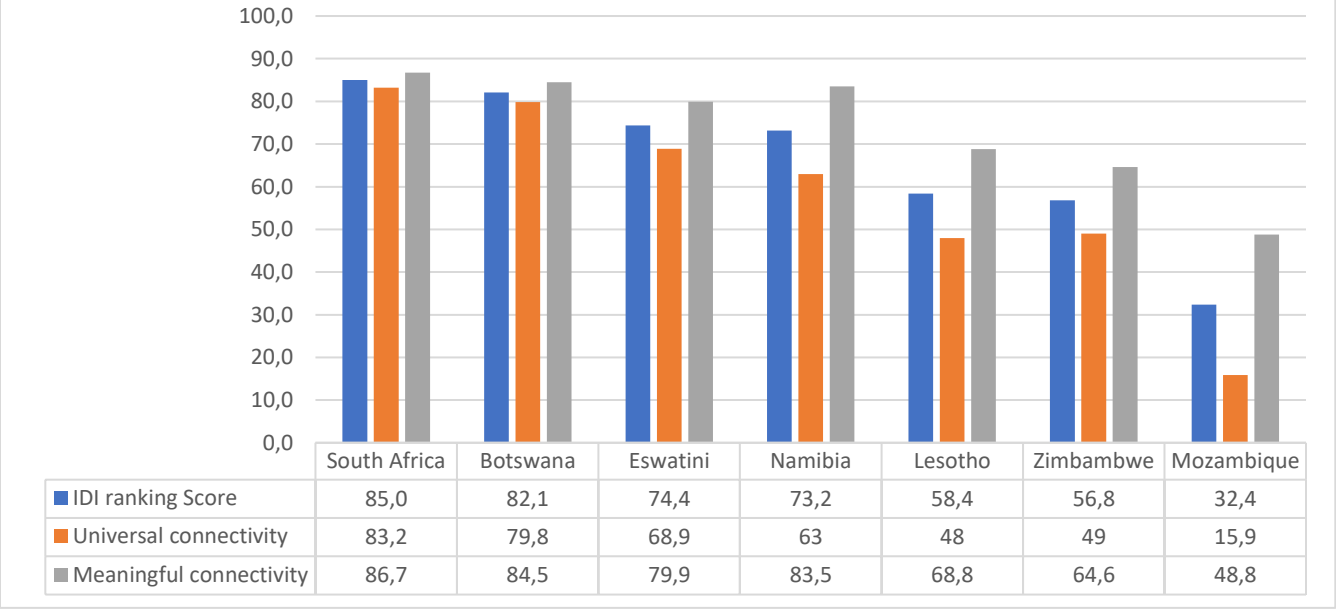
	Russia	China	South Africa	Brazil	India
IDI ranking Score	92,3	91,2	85,0	84,4	0
Universal connectivity	89,6	89,6	83,2	80,7	0
Meaningful connectivity	95	92,8	86,7	88	0

Source: ITU database, 2025.

4.14.2 IDI Ranking Score for South Africa with Neighbouring Countries.

Comparing South Africa with its neighbouring countries, South Africa leads with a score of 85.0, indicating the strongest overall ICT development among the listed countries. Botswana follows closely at 82.1, showing a high level of digital progress. Eswatini of 74.4 and Namibia of 73.2 demonstrate solid mid-to-high performance, suggesting growing digital infrastructure and usage. Lesotho of 58.4 and Zimbabwe of 56.8 fall into a moderate development range, indicating room for improvement in digital access, quality, and impact. Mozambique records the lowest score at 32.4, reflecting significant challenges in ICT development compared to its regional peers. Overall, the ranking score highlights disparities in digital advancement across Southern Africa, with higher scores representing stronger digital ecosystems, better infrastructure, and more effective integration of ICTs into social and economic activities.

Graph 45: South Africa IDI ranking score compared to international countries 2025.



	South Africa	Botswana	Eswatini	Namibia	Lesotho	Zimbambwe	Mozambique
IDI ranking Score	85,0	82,1	74,4	73,2	58,4	56,8	32,4
Universal connectivity	83,2	79,8	68,9	63	48	49	15,9
Meaningful connectivity	86,7	84,5	79,9	83,5	68,8	64,6	48,8

Source: ITU database, 2025.

4.15 Number Of Government Facilities Connected to the Internet Based on Obligations Imposed By ICASA

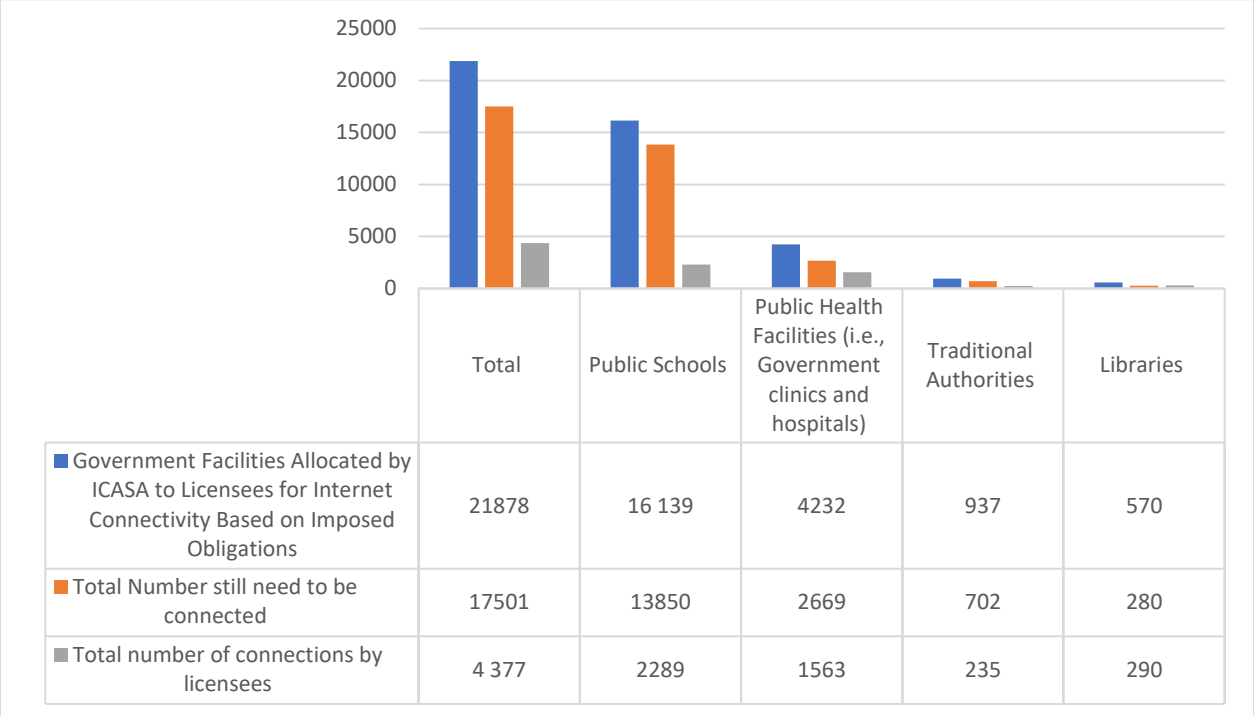
The Authority imposed obligations ensure that licensees contribute to universal service and digital inclusion. By requiring connectivity for public institutions, ICASA promotes social and economic development, especially in underserved communities. Internet access allows government facilities to operate more efficiently, increases transparency, and supports innovation. It also prepares communities for participation in the digital economy. The table highlights the urgent need to accelerate connections, as many facilities remain offline. Bridging this gap is essential for improving quality of life, promoting equal opportunities, and achieving long-term sustainable development in South Africa.

Since the spectrum was auctioned by ICASA in March 2022, licensees have been required to connect allocated government facilities as part of their coverage obligations. From the total of 21,878 facilities identified, only 4,377 have been connected so far. This represents approximately 20% completion. The connected facilities include schools, health centres, traditional authorities, and libraries, showing that some implementation has taken place. However, the progress appears limited when compared to the overall target set under the spectrum licensing conditions.

The remaining 17,501 facilities which is about 80% of the total still need to be connected. This large backlog indicates that licensees are moving slowly rather than quickly in fulfilling their obligations. Given the importance of internet access for education, healthcare, and community services, the pace of rollout may not be sufficient to meet national digital transformation goals. To achieve universal connectivity more effectively, stronger monitoring, enforcement, and possibly additional investment may be necessary to speed up the connection process.

The graph below illustrates the actual number of government facilities that have been connected to the internet compared to those that still require connectivity.

Graph 46: Number of Government Facilities connected to the internet as of October 2025.



	Total	Public Schools	Public Health Facilities (i.e., Government clinics and hospitals)	Traditional Authorities	Libraries
Government Facilities Allocated by ICASA to Licensees for Internet Connectivity Based on Imposed Obligations	21878	16 139	4232	937	570
Total Number still need to be connected	17501	13850	2669	702	280
Total number of connections by licensees	4 377	2289	1563	235	290

Source: ICASA Compliance & Consumer Affairs database, 2025.

5 The Broadcasting Sector

ICASA continues to play a central role in safeguarding the integrity, diversity, and fairness of South Africa's broadcasting sector. As the statutory regulator, ICASA ensures that broadcasting services operate in the public interest, promote constitutional values, and reflect cultural and linguistic diversity. The sector remains a powerful platform for information, education, and entertainment, shaping public discourse and democratic participation. Yet the rise of over-the-top (OTT) streaming platforms presents complex regulatory questions about fair competition, contributions to local content and taxation, and the equitable treatment of traditional broadcasters versus global players. These issues are now being examined in broader policy discussions aimed at ensuring that all services offering audiovisual content to South Africans are appropriately recognised and, where necessary, regulated in a balanced manner.

The broadcasting sector is currently undergoing significant transformation driven by digital migration, streaming platforms, and converged media services. Traditional broadcasters face growing competition from online content providers, creating pressure on revenue models and audience engagement patterns. This shift presents regulatory challenges, particularly in ensuring fair competition between licensed broadcasters and digital platforms operating beyond conventional frameworks and has led to inquiries into the effects of OTTs on subscription broadcasting and market competition. Content regulation, local content quotas and advertising standards require ongoing review to remain relevant in the digital era, while ICASA continues to engage stakeholders to address these structural challenges and preserve media plurality.

In 2025, ICASA introduced and progressed updated regulatory initiatives aimed at strengthening broadcasting governance and ensuring oversight remains responsive to technological change. Among these reforms, the Authority published the Draft White Paper on Audio and Audiovisual Media Services and Online Safety proposed, among other things, that OTT and on-demand content services be formally acknowledged under new regulatory categories and that licensing obligations might apply to certain global streaming platforms once criteria such as revenue thresholds are met. This represents an effort to bring technology neutral, fair regulation to all services delivering audiovisual content into South Africa, while continuing to support local content and protect consumer interests.Draft Digital Terrestrial Television Regulations, 2025 and invited public hearings to refine rules related to the digital broadcasting environment.

Looking ahead, ICASA remains focused on fostering innovation while safeguarding democratic values and social cohesion. Key priorities include promoting universal access to broadcasting services, encouraging investment in local production, and ensuring responsible content distribution across all platforms. The Authority is strengthening collaboration with government departments, industry stakeholders and civil society to enhance policy coherence and sector resilience. Harmonising obligations so that OTT and traditional broadcasting services contribute to South African content objectives and support independent production is a critical ongoing conversation in regulatory and policy forums. As new technologies continue to reshape the broadcasting environment, ICASA's regulatory approach will remain adaptive and forward-looking, supporting a vibrant, inclusive and sustainable broadcasting sector.

5.1 Broadcasting Revenue

The 2025 financial data show total revenue of R33.0 billion, indicating a strong overall performance. The largest contributor is Broadcasting Subscriptions Revenue, generating R24.5 billion, which accounts for most of the income and highlights a heavy reliance on subscriber-based earnings. Broadcasting Advertising Revenue follows at R6.0 billion, demonstrating that advertising remains a significant secondary income stream. Other revenue totals R1.7 billion, reflecting diversified but comparatively smaller income sources. Within this category, sponsorships of R527.11 million and government or state grants of R207.91 million are notable contributors. Revenue from digital platforms (OTT and streaming) stands at R82.63 million, suggesting growth potential but currently a small share of total income.

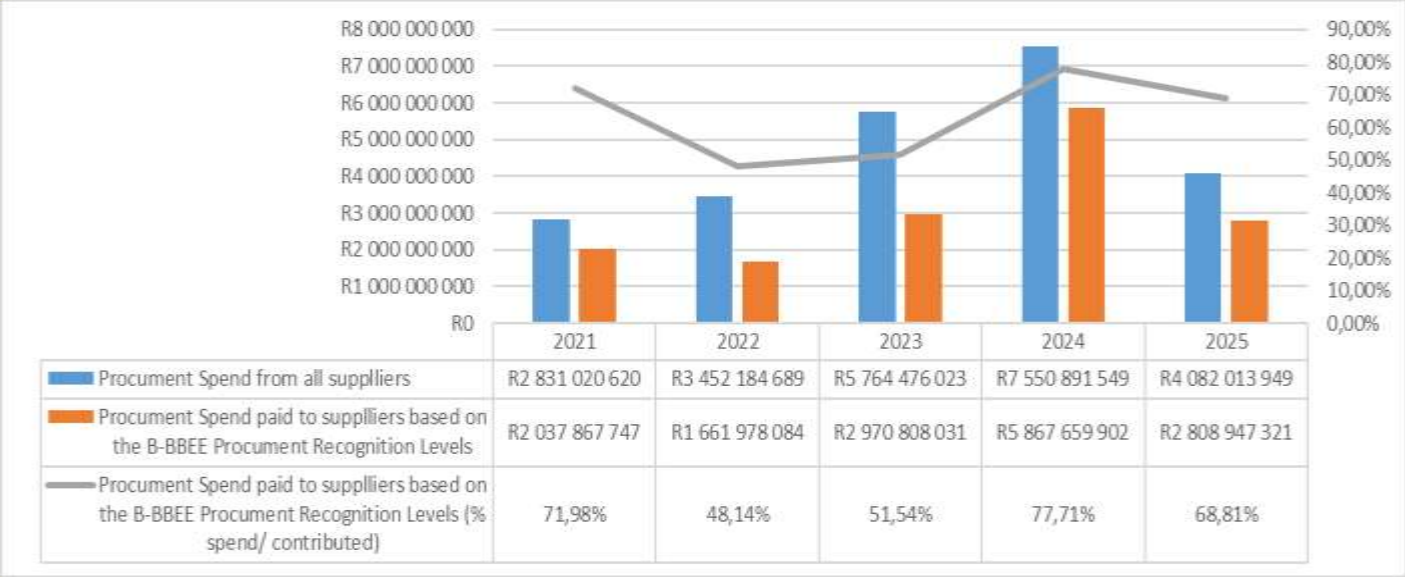
Graph 47: TV and Radio broadcasting revenues for the 12-month period.

Source: ICASA Broadcasters Questionnaire, 2025 (*data includes TV & radio broadcasting*).

5.2 Broadcasting Black Economic Empowerment Measures

The proportion of Procurement expenditure directed to suppliers based on their B-BBEE Procurement recognition levels changed between 2024 and 2025. In 2024, 77.7% of total Procurement spending was allocated to qualifying suppliers. In 2025, this figure was 68.8%. Although the percentage declined in 2025, the organisation remains committed to supporting suppliers with favourable B-BBEE recognition levels and advancing inclusive economic participation.

Graph 48: Broadcasting sector Procurement spend to all suppliers based on B-BBEE, for the 12-month period ending 30th September.



	2021	2022	2023	2024	2025
Procument Spend from all supplliers	R2 831 020 620	R3 452 184 689	R5 764 476 023	R7 550 891 549	R4 082 013 949
Procument Spend paid to supplliers based on the B-BBEE Procument Recognition Levels	R2 037 867 747	R1 661 978 084	R2 970 808 031	R5 867 659 902	R2 808 947 321
Procument Spend paid to supplliers based on the B-BBEE Procument Recognition Levels (% spend/ contributed)	71,98%	48,14%	51,54%	77,71%	68,81%

Source: ICASA Broadcasters Questionnaire, December 2021 – 2025.

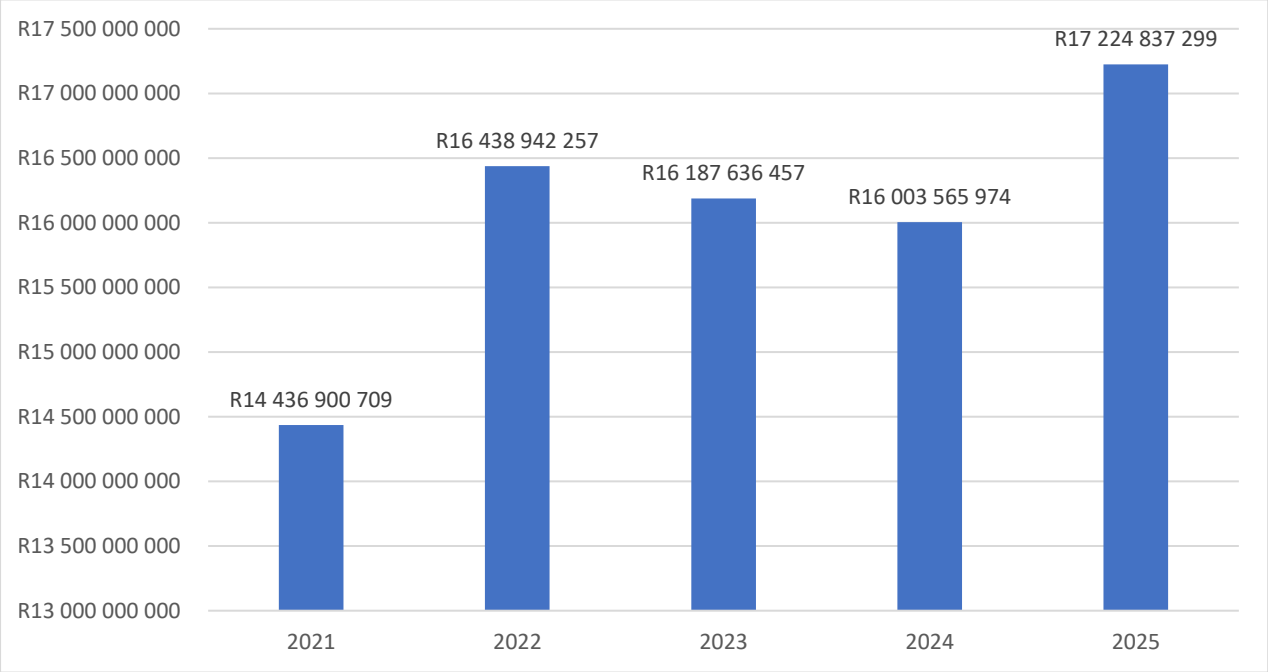
5.3 Programme Expenditure

Programme expenditure typically includes costs incurred by broadcasters to produce and deliver content such as news, entertainment, educational programming, and public service announcements. ICASA plays a vital regulatory role by ensuring that broadcasters comply with content quotas and prioritize public interest programming. ICASA's oversight helps allocate resources to promote fair competition and maintain high broadcasting standards.

Broadcasting programme expenditure rose by 7.6%, increasing from R16.0 billion in 2024 to R17.2 billion in 2025. This growth reflects a continued commitment to investing in high-quality content, strengthening production capabilities, and expanding audience reach across platforms.

For a period of 5 years, the expenditure increased from R14.4 billion in 2021 to R17.2 billion in 2025.

Graph 49: Programme expenditure as of 30th September each year.



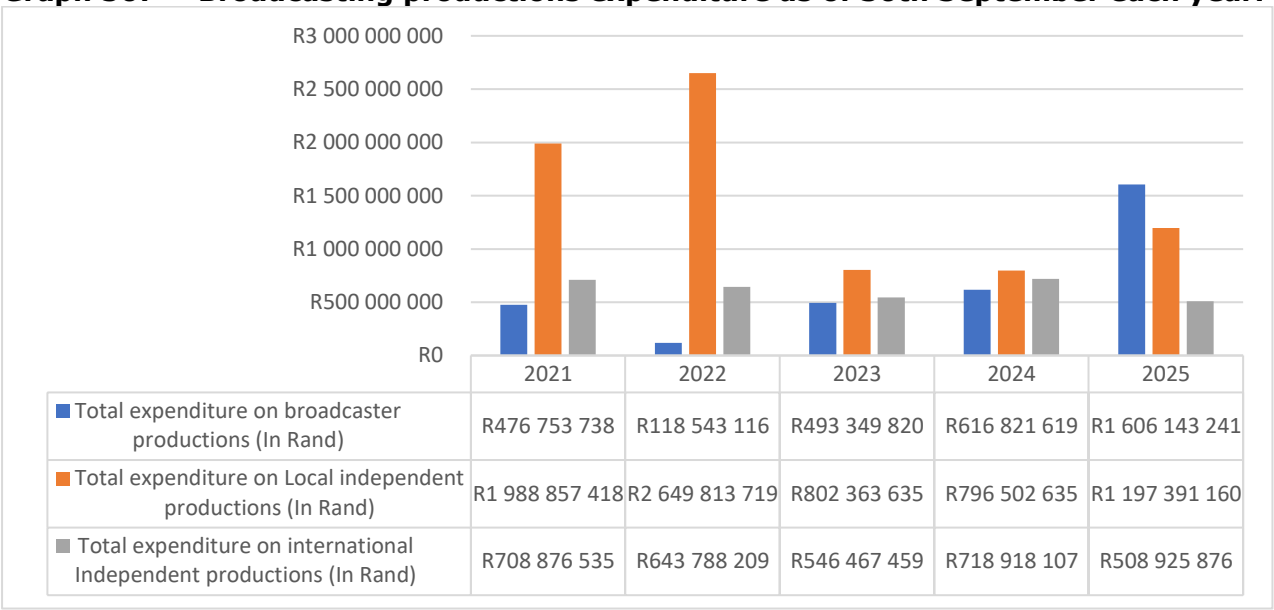
Source: ICASA Broadcasters Questionnaire, December 2021 – 2025.

5.4 Broadcasting Productions Expenditure

In 2024, total expenditure on broadcaster productions was R616,821,619, and in 2025 this increased sharply to R1,606,143,241, showing a dramatic expansion in broadcaster-led production. Spending on local independent productions in 2024 stood at R796,502,635, and in 2025 it rose significantly to R1,197,391,160, indicating renewed investment in domestic independent content. In contrast, expenditure on international independent productions was R718,918,107 in 2024, but in 2025 it declined to R508,925,876. Overall, while 2024 reflected moderate and balanced spending across categories, 2025 shows a strong shift toward broadcaster and local independent productions, with reduced emphasis on international independent.

For a period of 5 years, the total expenditure on broadcaster productions (In Rand) increased by 35.5%.

Graph 50: Broadcasting productions expenditure as of 30th September each year.



	2021	2022	2023	2024	2025
Total expenditure on broadcaster productions (In Rand)	R476 753 738	R118 543 116	R493 349 820	R616 821 619	R1 606 143 241
Total expenditure on Local independent productions (In Rand)	R1 988 857 418	R2 649 813 719	R802 363 635	R796 502 635	R1 197 391 160
Total expenditure on international Independent productions (In Rand)	R708 876 535	R643 788 209	R546 467 459	R718 918 107	R508 925 876

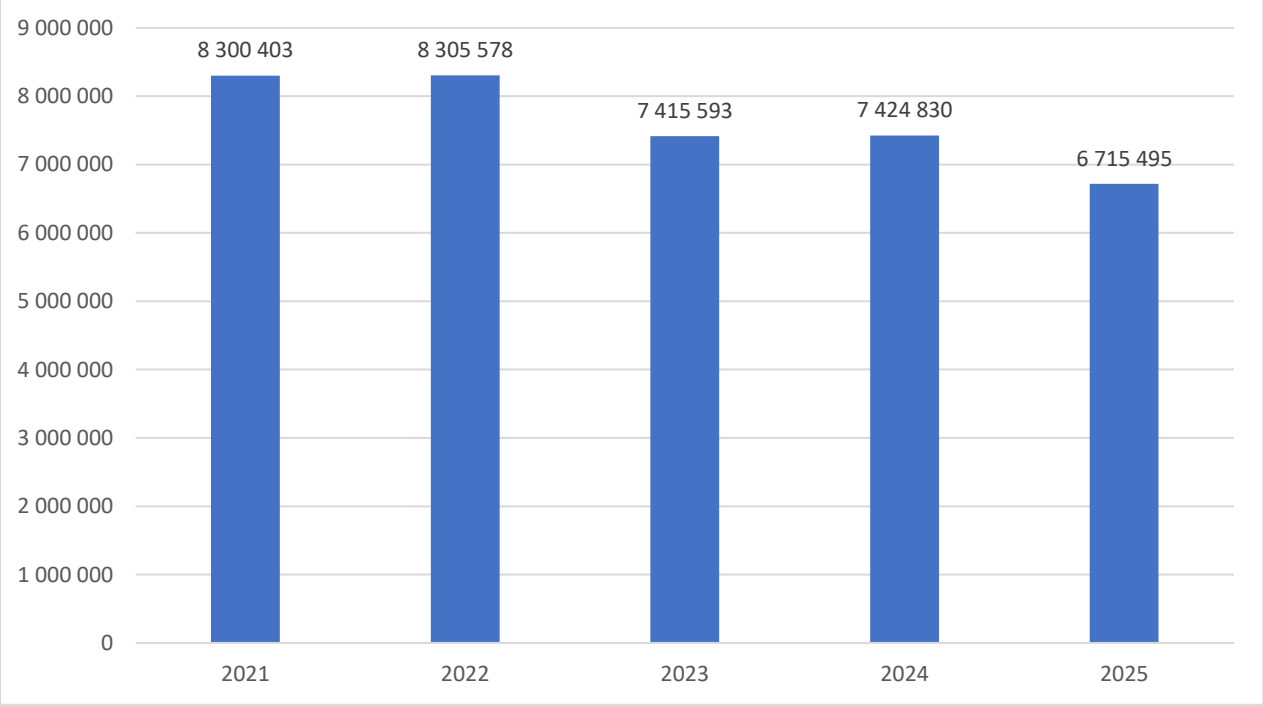
Source: ICASA Broadcasters Questionnaire, December 2021 – 2025.

5.5 Number Of Pay TV Subscribers

In 2025, the total number of Pay TV subscribers fell sharply by 9.6%, decreasing from 7.4 million in 2024 to 6.7 million. This decline reflects changing consumer habits and increased competition in the media industry. A major reason is the rapid growth of over-the-top (OTT) streaming services, which offer on-demand content accessible via the internet, allowing viewers more flexibility than traditional Pay TV. The widespread availability of high-speed internet has made streaming more convenient and affordable, attracting many users away from conventional subscriptions. Rising Pay TV costs and economic pressures have also contributed to this significant shift in viewing preferences.

Over the five-year period, Pay TV subscribers decreased (compound annual growth rate (CAGR)) of 5.2%,

Graph 51: Number of Pay TV subscribers as of 30th September each year.



Source: ICASA Broadcasters Questionnaire, December 2021 – 2025.

5.6 Total Number of Television Stations and Distributors

Between 2024 and 2025, the number of set-top boxes decreases slightly from 21,841,703 to 21,465,837, showing a small decline in household or user adoption. Digital terrestrial stations drop sharply from 92 to 55, while analogue terrestrial stations remain the same at 4. Digital satellite stations decline from 56 to 39. Signal distributors rise from 7 to 12, indicating more entities managing signal distribution. Most notably, content distributors remained constant at 6 in both 2024 and 2025, reflecting stability at a low level after a drastic prior reduction.

Over the five-year period, the number of set-top boxes slightly grew at a compound annual growth rate (CAGR) of 1.1%.

Graph 52: Total Number of Television Stations and Distributors as of 30th September each year.

	Number of set-top boxes	Number of Digital Terrestrial Stations	Number of Analogue Terrestrial Stations	Number of Digital Satelite Stations	Number of Signal Distributors	Number of Content Distributors
2021	20 520 177	86	6	53	10	147
2022	21 335 805	86	4	52	8	139
2023	21 987 755	88	12	54	11	142
2024	21 841 703	92	4	56	7	6
2025	21 465 837	55	4	39	12	6

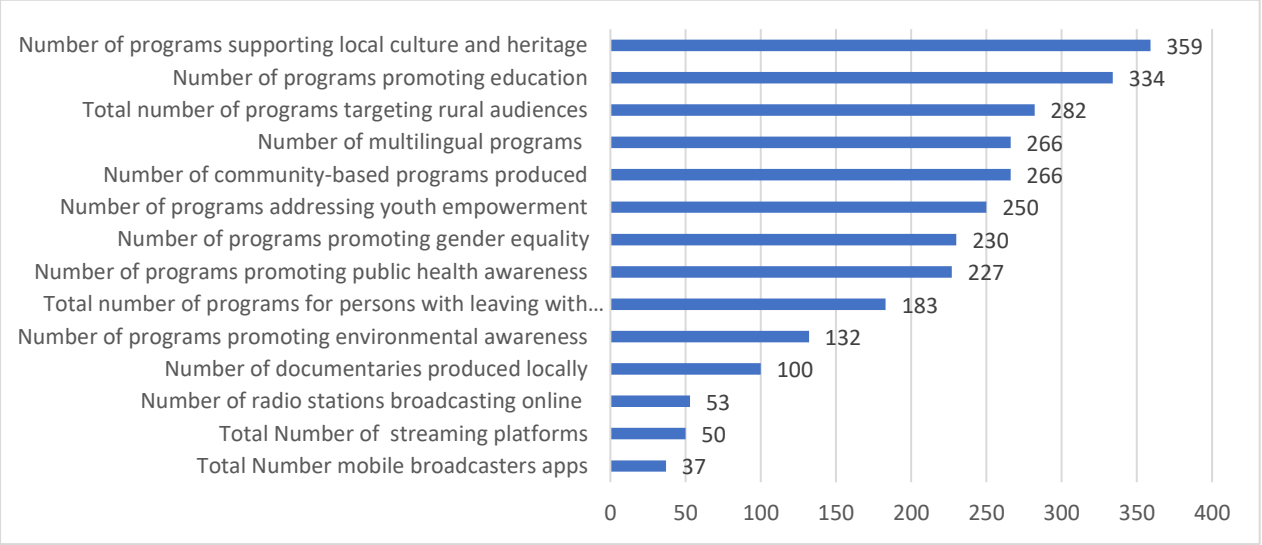
Source: ICASA Broadcasters Questionnaire, December 2021 – 2025.

*Government subsidies set-top boxes are not included *

5.7 Number Of Broadcasting Programs, Multilingual Broadcasting, And Online Produced Locally.

The data provided reflects a vibrant and diverse media landscape with a strong focus on social impact and community engagement. There are 37 mobile broadcaster apps and 50 streaming platforms, showing significant digital accessibility, while 53 radio stations also broadcast online, indicating traditional media adapting to digital trends. In terms of content, local production is robust, with 100 documentaries and 266 community-based and multilingual programs, ensuring inclusion and cultural representation. Programming priorities emphasize social development: 183 programs for persons living with disabilities, 227 on public health, 230 promoting gender equality, and 250 addressing youth empowerment. Environmental awareness is also addressed through 132 dedicated programs. Educational initiatives are prominent, with 334 programs promoting education, while local culture and heritage are strongly supported in 359 programs. Rural audiences are targeted in 282 programs, highlighting efforts to reach underserved communities. Overall, the data shows a media sector actively promoting social, cultural, and educational development across diverse audiences.

Graph 53: Total Number of Television Stations and Distributors as of 30th September each year.



Source: ICASA Broadcasters Questionnaire, December 2025.

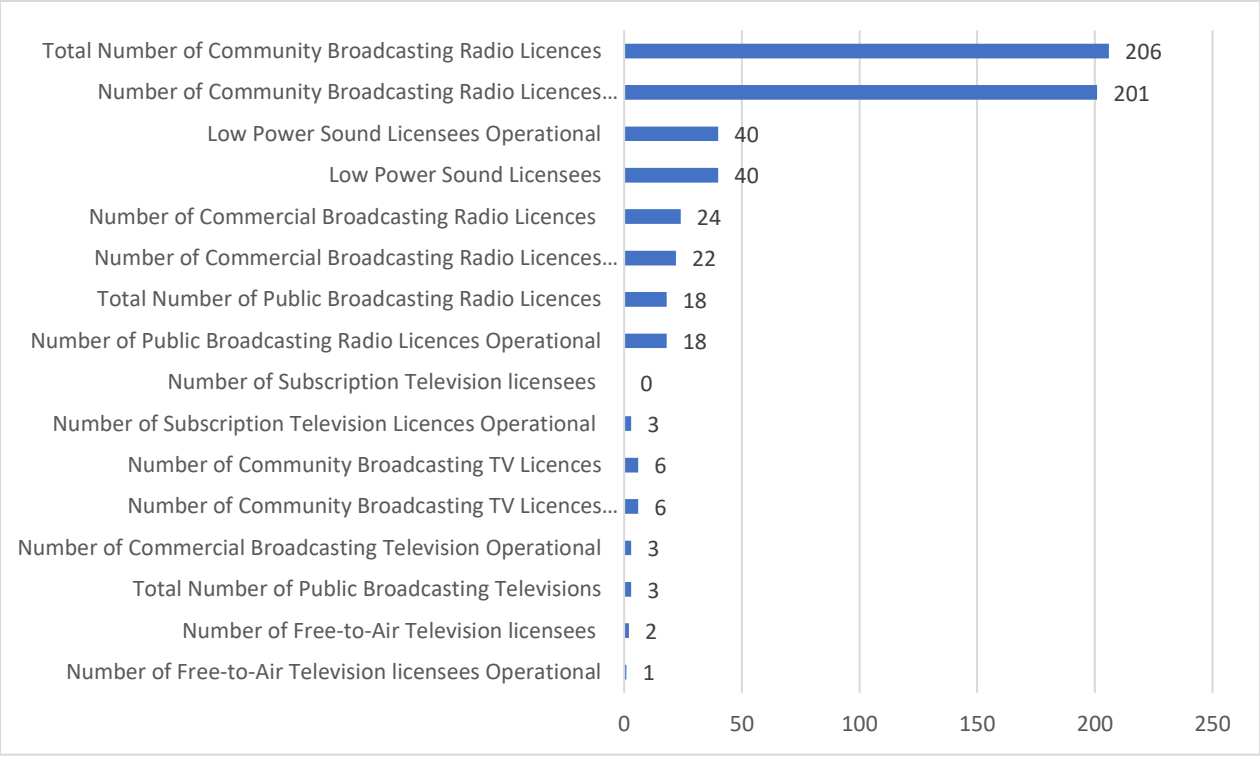
5.8 Total Number of TV And Radio Licences

Commercial and community broadcasters who neglected to renew their broadcasting licences within the specified timeframe were directed to cease all operational activities.

This situation underscores the crucial significance of regulatory compliance within the broadcasting sector. It serves as a stark reminder of the serious consequences faced by entities that fail to adhere to licensing requirements that can lead to operational interruptions, loss of revenue, and diminished trust among viewers and subscribers. The necessity of keeping licensing current is crucial for maintaining the integrity and sustainability of broadcasting services within the industry.

The total number of TV and radio stations in South Africa that the Authority is regulating in 2026 is shown in the graph below.

Graph 54: Total Number of transmissions and licenses subscriptions.



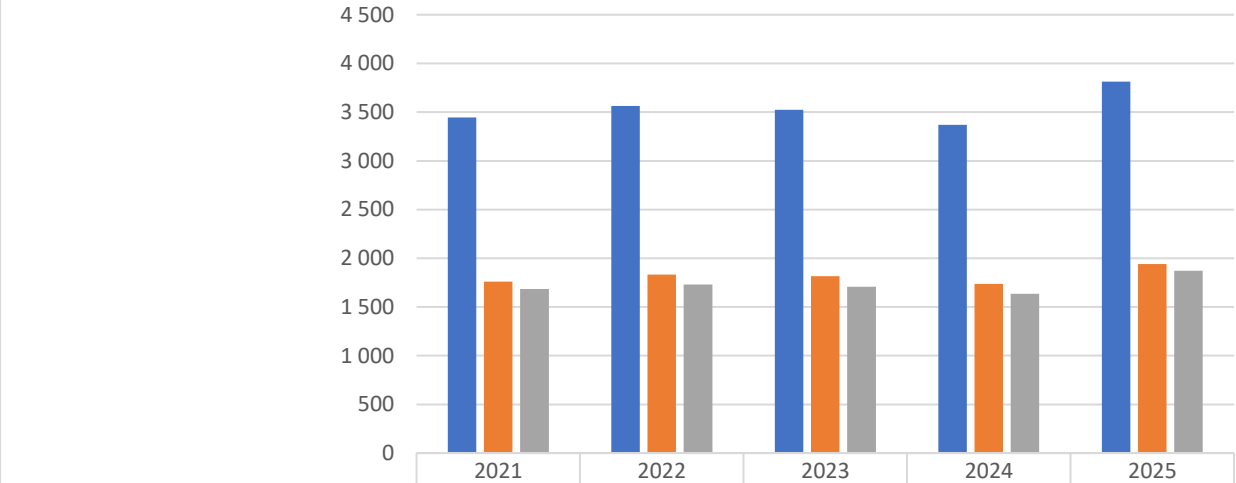
Source: ICASA Licensing and Compliance, 2026.

5.9 Broadcasting Sector Employment

In 2025, the broadcasting industry experienced a notable rise in employment, with overall workforce numbers increasing by 13.1% compared to the previous year. This growth was observed across both genders, although the rate of increase differed. Female employment in the sector rose by 11.9%, reflecting steady progress in gender representation within broadcasting roles. Male employment grew at a slightly higher rate of 14.5%, contributing significantly to the overall expansion of the workforce. These figures highlight a positive trend in job creation within the industry and suggest that opportunities for both men and women continued to expand in 2025.

The compound annual growth rate (CAGR) for total broadcasting employment increased by more than 2.4%, with similar growth observed for both male and female employees. This upward trend highlights steady expansion across the industry, reflecting consistent job creation for all genders over the period measured.

Graph 55: People employed in the broadcasting sector, as of the 30th of September each year.



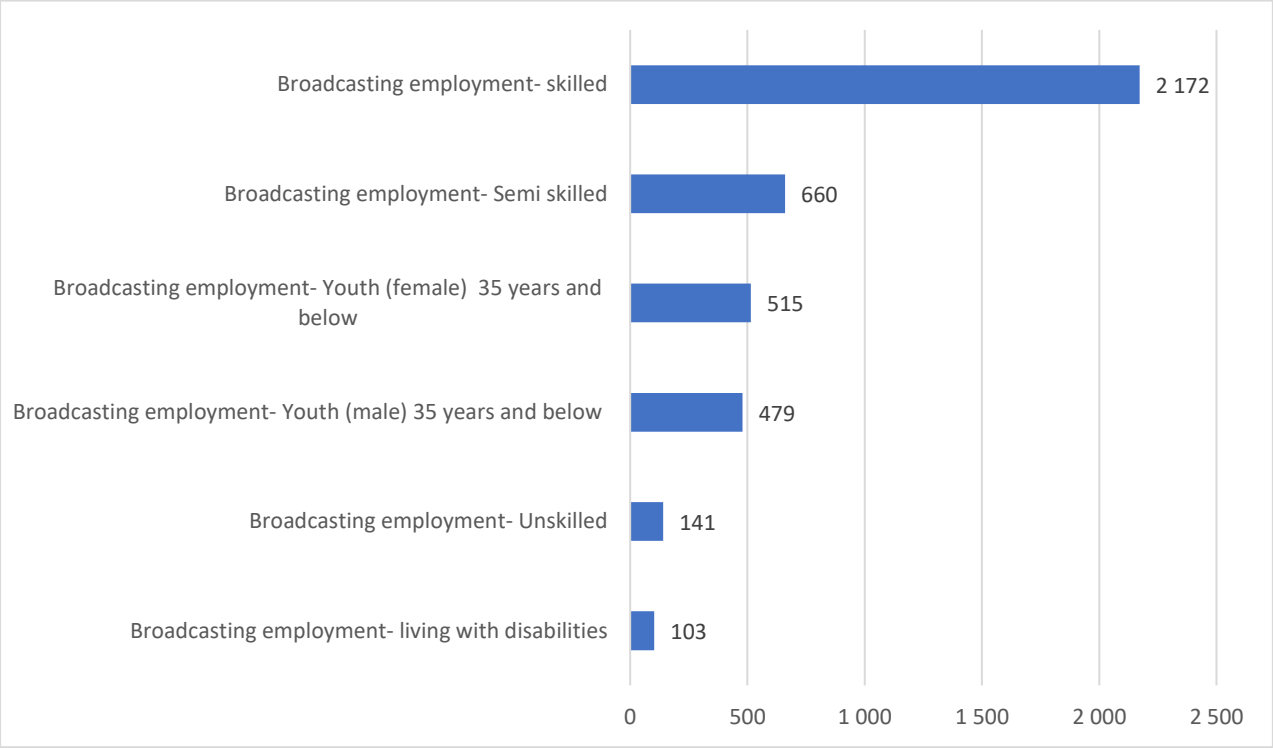
	2021	2022	2023	2024	2025
Broadcasting employment -Total	3 444	3 562	3 524	3 371	3 814
Broadcasting employment- female	1 760	1 832	1 815	1 736	1 942
Broadcasting employment- male	1 684	1 730	1 709	1 635	1 872

Source: ICASA Broadcasters Questionnaire, December 2021 – 2025.

5.10 Breakdown Of Persons Employed in the Broadcasting Sector

In 2025, the broadcasting sector shows the following employment profile. Skilled employees make up the largest group with 2,172 individuals, indicating that broadcasting heavily relies on experienced and trained staff. semi-skilled workers follow with 660 employees, suggesting moderate opportunities for those with some training. Youth employment is also significant, with 515 females and 479 males aged 35 and below, highlighting the sector's appeal and inclusivity for younger workers. Unskilled positions account for 141 people, showing limited opportunities for those without prior experience or training. Lastly, 103 individuals living with disabilities are employed, reflecting efforts toward inclusivity, though this number remains relatively low compared to other groups. Overall, skilled labour dominates the sector.

Graph 56: Persons employed in the broadcasting sector breakdown in 2025.

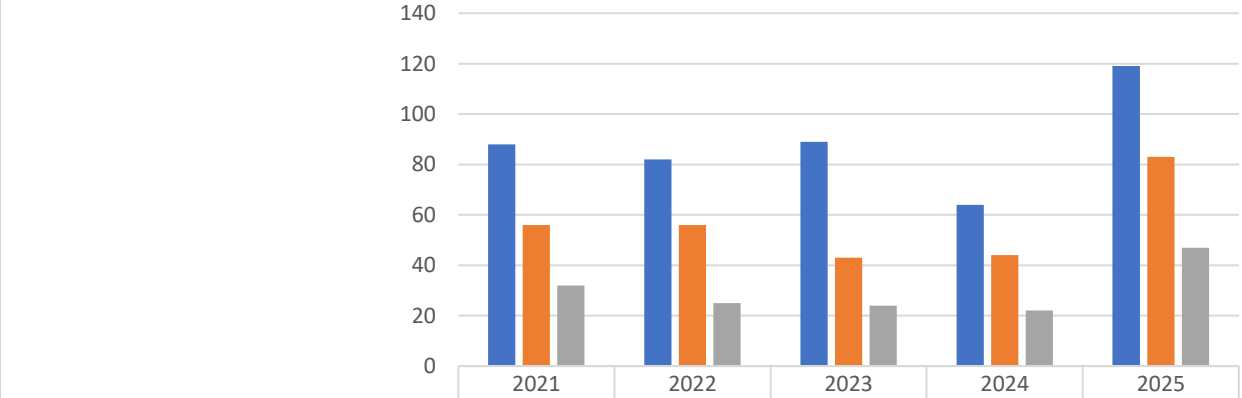


Source: ICASA Broadcasters Questionnaire, December 2025.

5.11 Proportion of Black People in Top Management in the Broadcasting Sector

Looking at the comparison between 2024 and 2025, the table shows a notable increase in all categories of broadcasting top management employment. Total EXCO members rose sharply from 64 in 2024 to 119 in 2025, indicating significant organizational growth or restructuring at the highest level. Black representation in top management also improved substantially, increasing from 44 to 83, which reflects a strong effort toward diversity and inclusion within leadership roles. The growth is even more pronounced for Black top female management, which more than doubled from 22 in 2024 to 47 in 2025, highlighting a major improvement in gender and racial representation in executive positions. Overall, the comparison demonstrates a positive trend toward greater inclusivity and diversity in broadcasting leadership, with 2025 marking a significant step forward in both total leadership numbers and the representation of historically underrepresented groups, especially Black women in top management.

Graph 57: Broadcasting Black Economic Empowerment Measures, for the 12-month period ending 30th September each year.



	2021	2022	2023	2024	2025
Broadcasting employment- Top Management (EXCO members)	88	82	89	64	119
Broadcasting employment- Black Top Management (EXCO members)	56	56	43	44	83
Broadcasting employment- Black Top Female Management (EXCO members)	32	25	24	22	47

Source: ICASA Broadcasters Questionnaire, December 2021 – 2025.

Note: We had high respond rate in community radio and TV, hence the above figures doubled.

6 The Postal Services Sector

The postal sector in South Africa faces structural challenges as consumer behaviour shifts toward digital communication and e-commerce. Traditional postal services volumes including parcel and letter deliveries have declined sharply as online communication and e-commerce platforms grow, placing pressure. Courier companies are expanding rapidly because of demand for timely online order deliveries, but this growth also exposes inefficiencies in infrastructure and logistics. ICASA's regulatory oversight includes licensing and monitoring both reserved and unreserved postal services to balance competition and service quality in a market increasingly shaped by internet-driven demand.

ICASA continues to update its regulatory framework to respond to evolving market needs and online delivery challenges. In March 2025, ICASA published new Regulations on the Conveyance of Mail, 2025 that replace the older 2009 regulations and impose clearer duties, security standards, and penalties for licensed mail conveyers including private couriers to improve accountability and consumer protection in an increasingly digital economy. These processes often involve public hearings and stakeholder consultation (e.g., on draft regulations), enabling industry and community participation before finalisation.

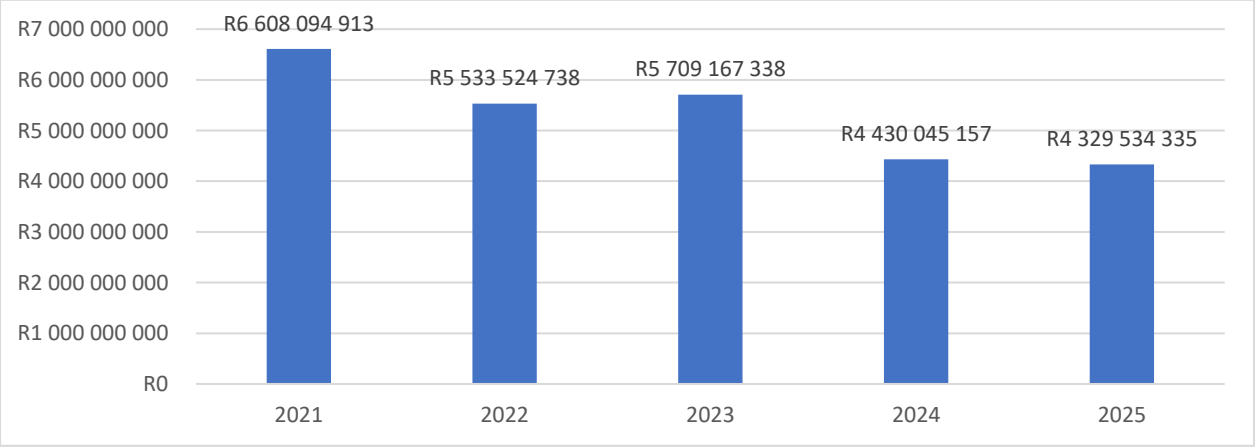
6.1 Postal Sector Revenue

OTT context: Digital substitution continues to reduce traditional letter volumes, while OTT-enabled e-commerce shapes parcel demand. Although domestic parcel volumes declined in 2025, strong recovery in International Mail Centre volumes reflects growing cross-border e-commerce activity and changing consumer fulfilment patterns.

In 2025, the revenue generated by postal services experienced a decline, decreasing by 2.3% compared to the previous year. This drop reflects the ongoing challenges faced by the industry, including increased competition from digital communication, changes in consumer behaviour, and the rise of private courier services. The reduction in income highlights the need for postal operators to adapt their strategies, diversify services, and innovate to remain sustainable. Despite efforts to modernize operations, the sector continues to face pressure on traditional revenue streams, signalling a critical period of transformation and adjustment for postal services.

Over the past five years, postal services revenue indicated a decreased compound annual growth rate (CAGR) of 10.0%.

Graph 58: Postal sector revenue, 12-month period ending 30th September each year.

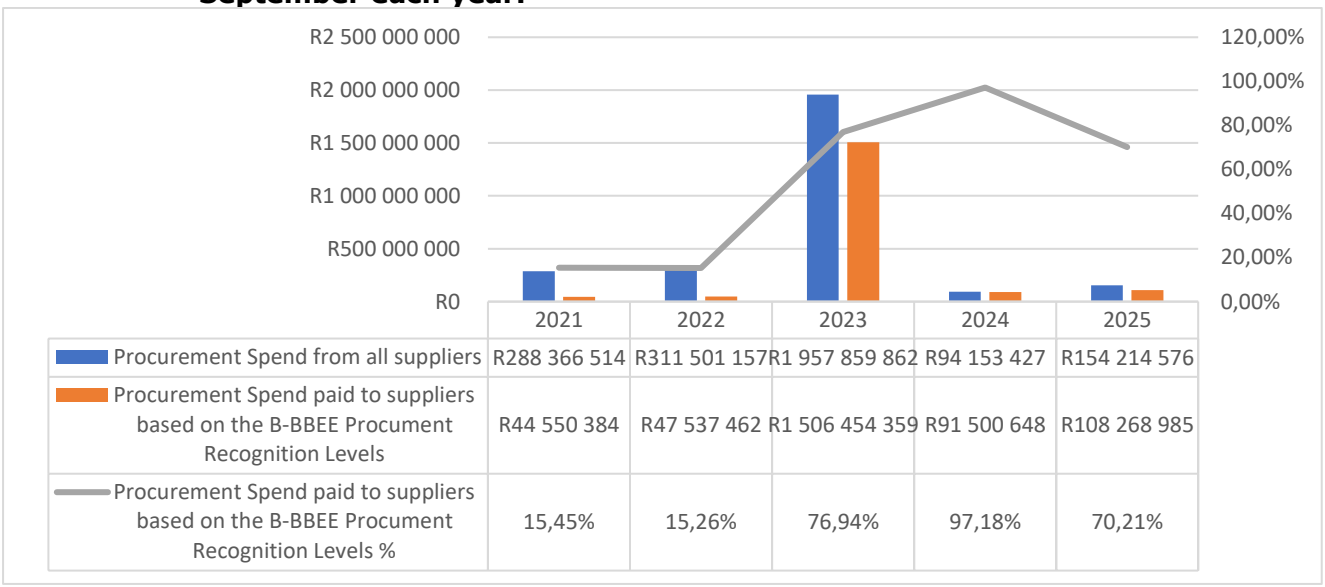


Source: ICASA Postal Questionnaire, December 2021 – 2025.
We had low response rate from unreserved postal sector

6.2 Postal Sector Black Economic Empowerment Measures

In 2024, 97.2% of total spending in the postal sector was directed to suppliers based on their B-BBEE ratings. However, this allocation experienced a significant shift in 2025, dropping sharply to 70.2%. This notable decrease indicates a change in Procurement patterns or supplier engagement within the sector. The reduction may reflect evolving compliance strategies, adjustments in supplier performance, or broader economic and operational factors influencing Procurement decisions. Such a shift highlights the need for continuous monitoring of supplier contributions and the impact of B-BBEE ratings on spending allocations, ensuring alignment with both regulatory requirements and strategic objectives.

Graph 59: Postal sector Procurement spends to suppliers based on the B-BBEE Procurement Recognition Levels, for the 12-month period ending 30th September each year.



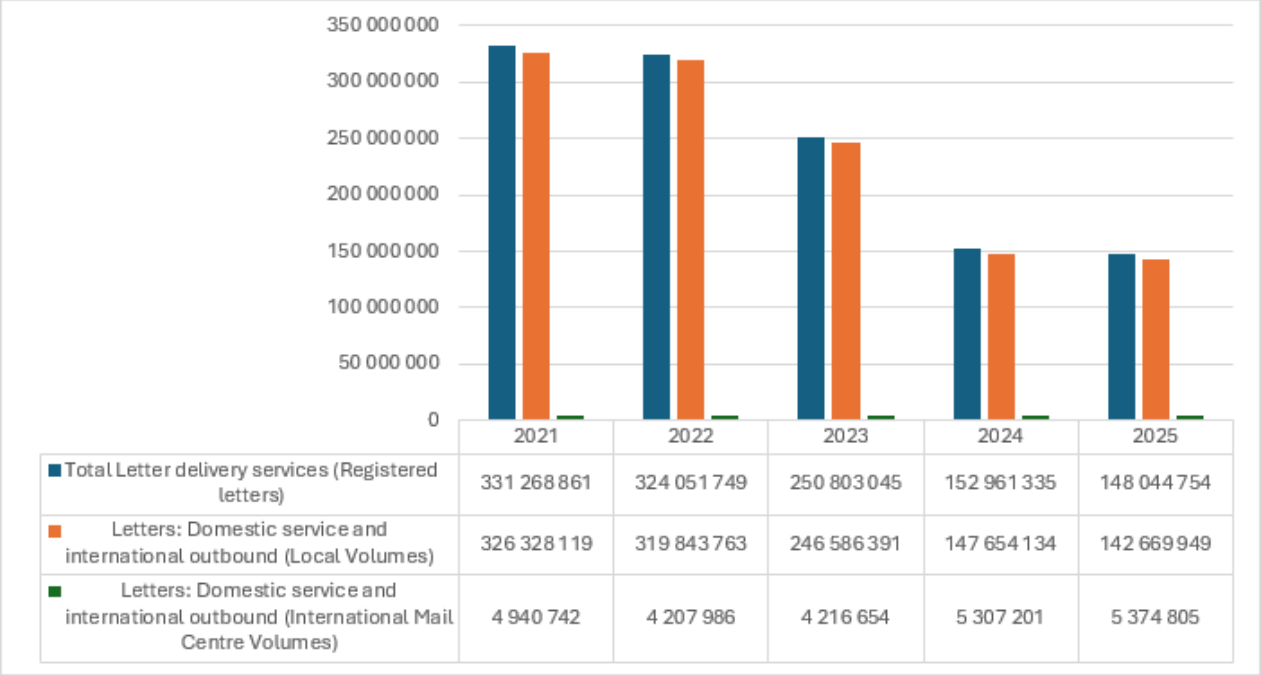
	2021	2022	2023	2024	2025
Procurement Spend from all suppliers	R288 366 514	R311 501 157	R1 957 859 862	R94 153 427	R154 214 576
Procurement Spend paid to suppliers based on the B-BBEE Procument Recognition Levels	R44 550 384	R47 537 462	R1 506 454 359	R91 500 648	R108 268 985
Procurement Spend paid to suppliers based on the B-BBEE Procument Recognition Levels %	15,45%	15,26%	76,94%	97,18%	70,21%

Source: ICASA Postal Questionnaire, December 2021 – 2025.
Note: *we had low response rate from unreserved postal sector*

6.3 Total Letter Delivery Services (Registered Letters)

In 2025, total registered letter delivery services decreased from 152,961,335 in 2024 to 148,044,754, reflecting a continued decline in domestic letter usage. Local volumes fell from 147,654,134 to 142,669,949 over the same period. International Mail Centre (IMC) volumes showed only a marginal increase, rising slightly from 5,307,201 in 2024 to 5,374,805 in 2025. This small increase does not significantly offset the broader decline in total registered letters.

Graph 60: Total number of letter delivery services (registered letters), as of 30th September each year.



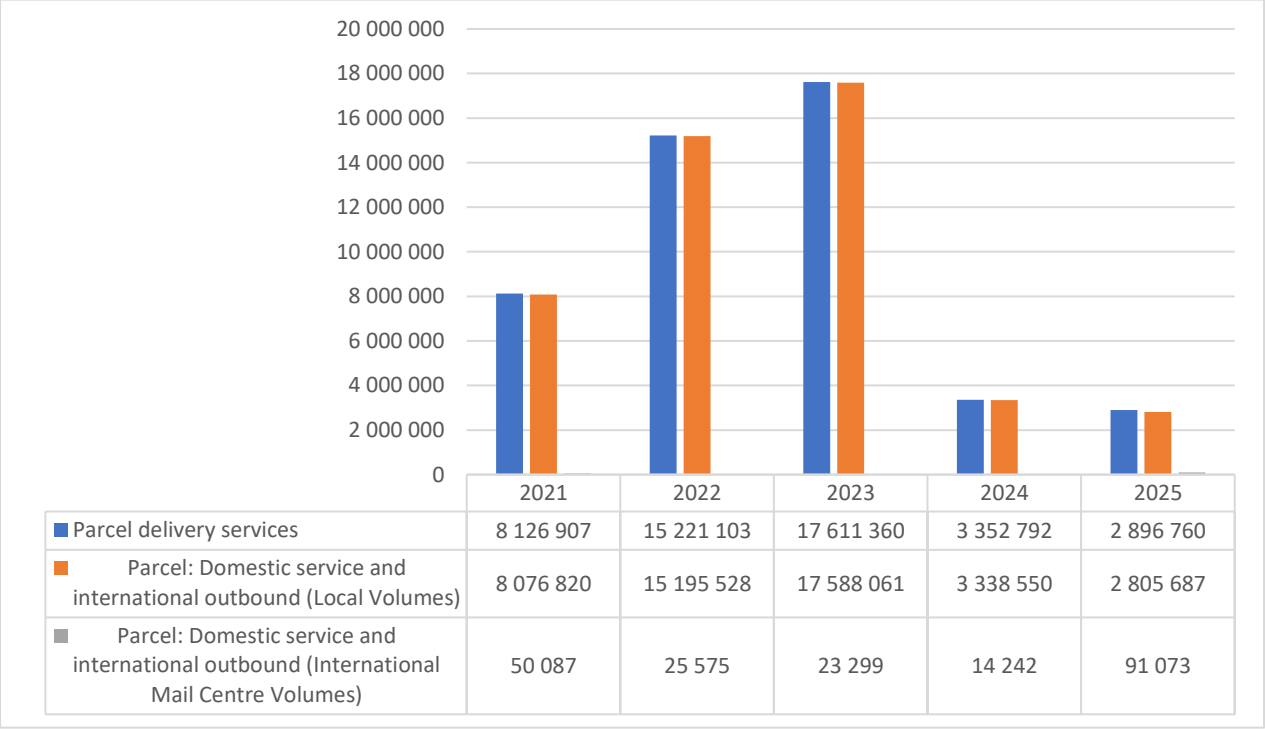
	2021	2022	2023	2024	2025
Total Letter delivery services (Registered letters)	331 268 861	324 051 749	250 803 045	152 961 335	148 044 754
Letters: Domestic service and international outbound (Local Volumes)	326 328 119	319 843 763	246 586 391	147 654 134	142 669 949
Letters: Domestic service and international outbound (International Mail Centre Volumes)	4 940 742	4 207 986	4 216 654	5 307 201	5 374 805

Source: ICASA Postal Questionnaire, December 2021 – 2025.
Note: *we had low response rate from unreserved postal sector*

6.4 Total Number of Parcel Delivery Services

In 2025, total parcel delivery services decreased to 2,896,760 compared to 3,352,792 in 2024, showing a continued decline. Domestic and international outbound (Local Volumes) also fell from 3,338,550 in 2024 to 2,805,687 in 2025, indicating a further reduction in local parcel activity. However, International Mail Centre volumes increased significantly from 14,242 in 2024 to 91,073 in 2025, reflecting a strong recovery in this category. In 2024, all categories had experienced decreases, particularly in total and local volumes. Overall, while 2025 recorded further declines in total and local parcels, it showed notable growth in International Mail Centre volumes.

Graph 61: Total number of parcel delivery services, as of 30th September each year.



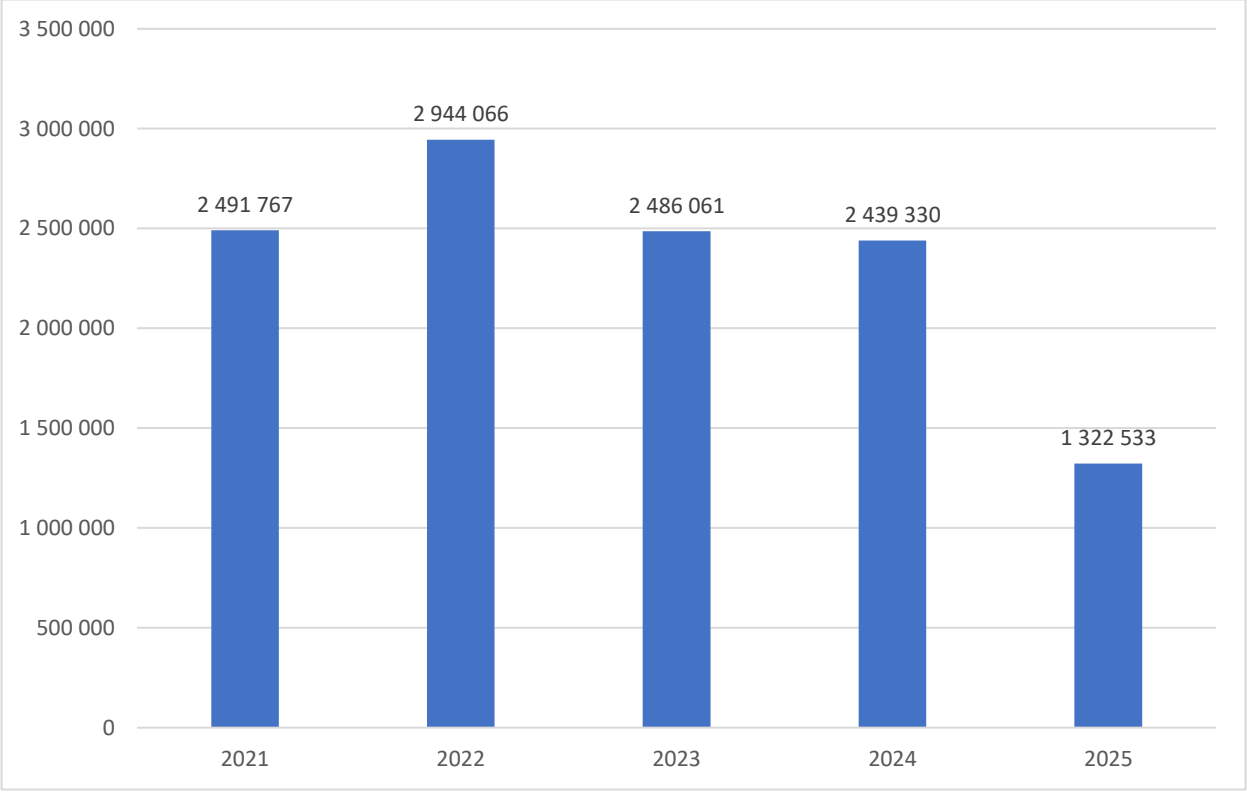
	2021	2022	2023	2024	2025
Parcel delivery services	8 126 907	15 221 103	17 611 360	3 352 792	2 896 760
Parcel: Domestic service and international outbound (Local Volumes)	8 076 820	15 195 528	17 588 061	3 338 550	2 805 687
Parcel: Domestic service and international outbound (International Mail Centre Volumes)	50 087	25 575	23 299	14 242	91 073

Source: ICASA Postal Questionnaire, December 2021 – 2025.
Note: *we had low response rate from unreserved postal sector*

6.5 Total Numbers of Express Delivery Services

Express delivery services ("EMS") shows fluctuations over five years. EMS volumes from 2021 to 2025. In 2021, deliveries were 2,491,767 and increased significantly in 2022 to 2,944,066, representing the highest value in the period. However, from 2023 onward, volumes declined steadily. In 2023, deliveries dropped to 2,486,061, followed by a slight decrease to 2,439,330 in 2024. The most notable decline occurred in 2025, when volumes fell sharply to 1,322,533—almost half of the 2022 peak. Overall, the data indicates initial growth between 2021 and 2022, followed by a consistent downward trend, suggesting reduced demand, operational challenges, and increased competition in later years.

Graph 62: Total number of express delivery services (EMS), as of 30th September each year.

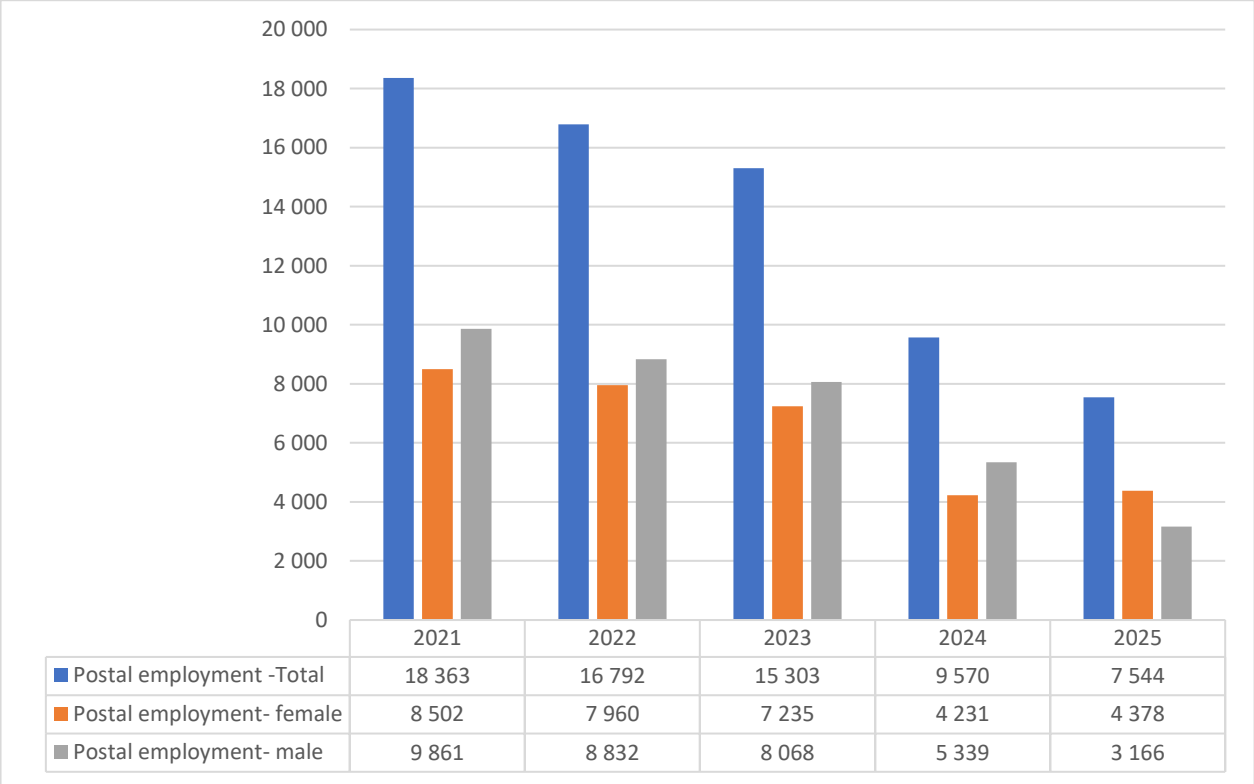


Source: ICASA Postal Questionnaire, December 2021 – 2025.
Note: *we had low response rate from unreserved postal sector*

6.6 Postal Service Sector Employment

In 2025, comparing 2024 with 2025, total postal employment falls from 9,570 to 7,544, a reduction of 2,026 jobs. Male employment shows the most significant drop, from 5,339 to 3,166, losing 2,173 positions. Interestingly, female employment slightly increases from 4,231 in 2024 to 4,378 in 2025, suggesting that the decline in the postal workforce disproportionately affects males. Overall, this indicates a continuing contraction in postal services employment, with male jobs being cut more heavily, while female employment remains relatively stable, slightly mitigating the overall workforce reduction.

Graph 63: Persons employed in Post Service Sector, by gender, as of 30th September each year.



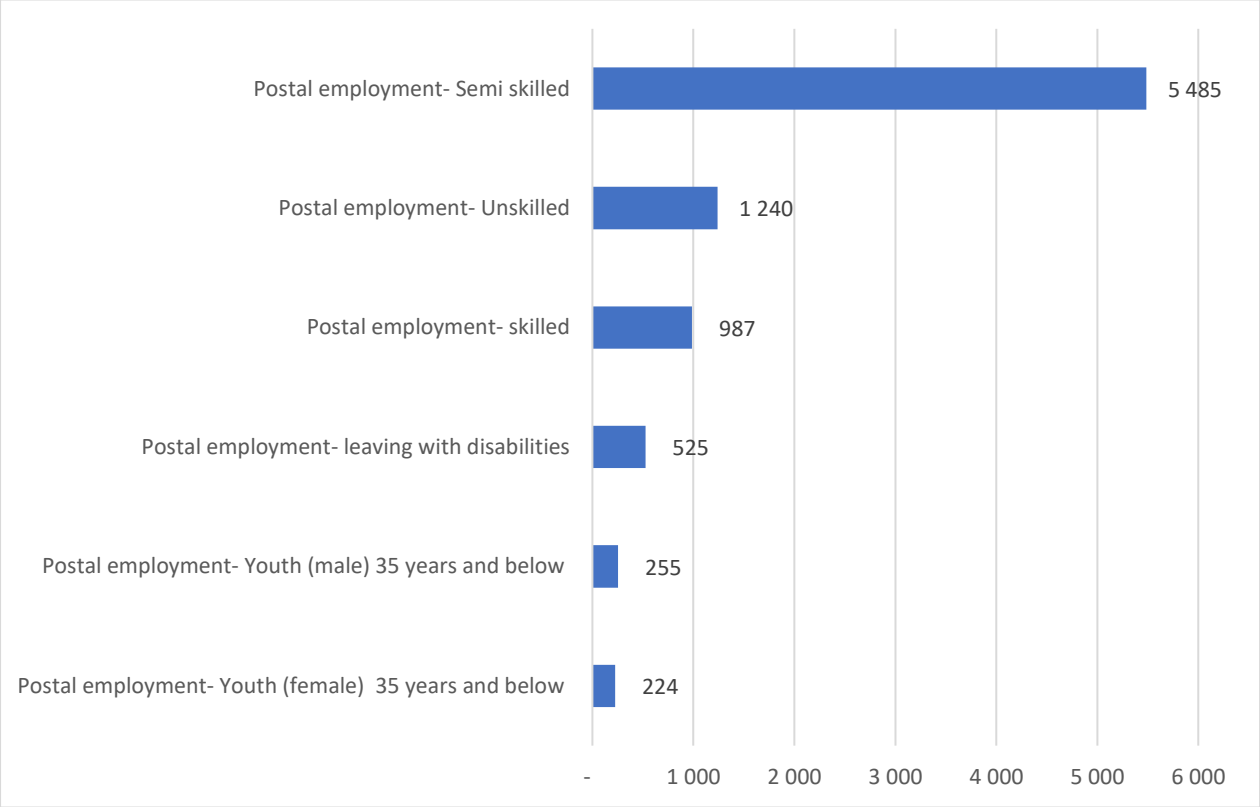
	2021	2022	2023	2024	2025
Postal employment -Total	18 363	16 792	15 303	9 570	7 544
Postal employment- female	8 502	7 960	7 235	4 231	4 378
Postal employment- male	9 861	8 832	8 068	5 339	3 166

Source: ICASA Postal Questionnaire, December 2021 – 2025.
Note: *we had low response rate from unreserved postal sector*

6.7 Breakdown Of Persons Employed in the Postal Sector

In 2025, postal employment shows a diverse workforce across different categories. Youth aged 35 and below make up a significant portion, with 224 females and 255 males, reflecting active engagement of young talent. Employees living with disabilities number 525, highlighting inclusion efforts. Skilled workers account for 987 positions, while semi-skilled roles dominate with 5,485 employees, showing reliance on intermediate expertise. Unskilled positions total 1,240, indicating entry-level opportunities. Overall, the data suggests that the postal sector balances inclusivity and varying skill levels, with semi-skilled roles being the backbone of the workforce, and continuous opportunities for youth and persons with disabilities.

Graph 64: Persons employed in the postal sector breakdown, for the 12-month period ending 30th September each year.

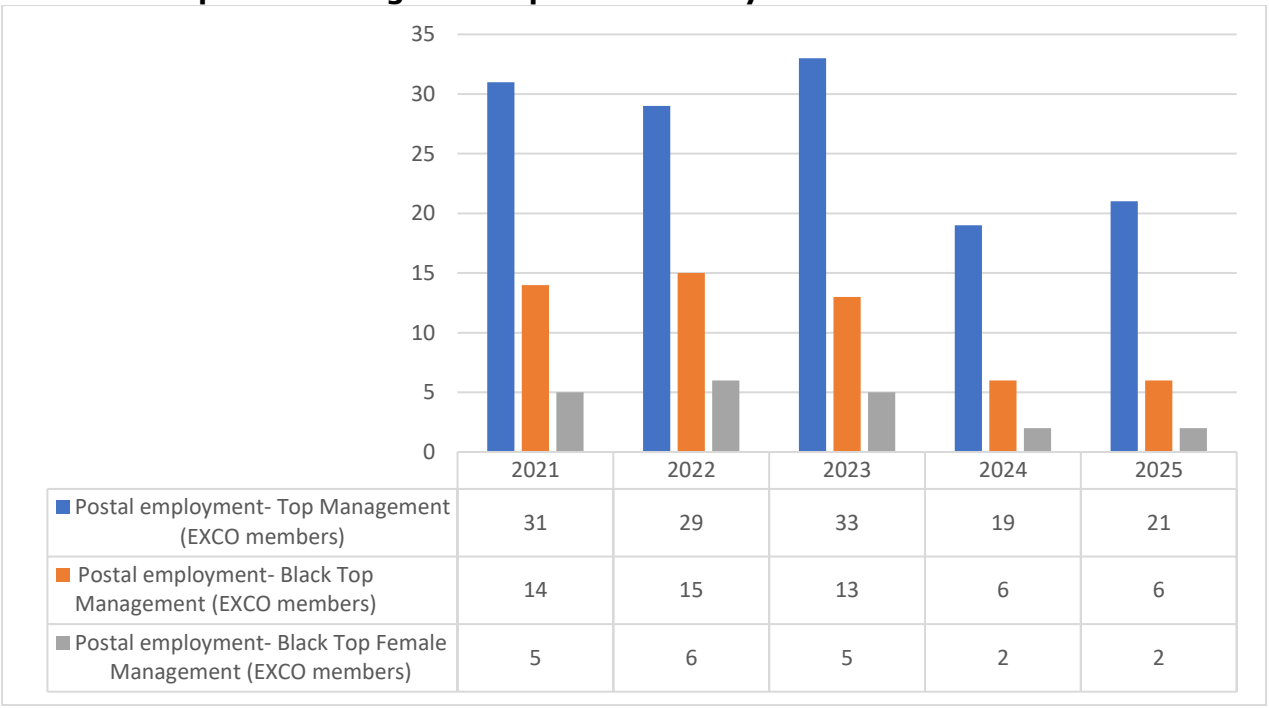


Source: ICASA Postal Questionnaire, December 2025.
Note: *we had low response rate from unreserved postal sector*

6.8 Postal Service Sector Black Economic Empowerment Measures

The postal employment at the top management (EXCO) level shows a slight recovery after a decline. Overall EXCO membership increased from 19 in 2024 to 21 in 2025, indicating a modest growth in top-level positions. However, Black representation at the EXCO level remain the same for the same period. Similarly, Black top female management remained constant at 2 in both years, showing no progress in increasing gender representation within the Black executive cohort. This suggests that while the total number of top management positions is rebounding, efforts toward achieving equitable racial and gender representation are stagnating or even slightly declining.

Graph 65: Postal sector Black Economic Empowerment Measures, for the 12-month period ending 30th September each year.



	2021	2022	2023	2024	2025
Postal employment- Top Management (EXCO members)	31	29	33	19	21
Postal employment- Black Top Management (EXCO members)	14	15	13	6	6
Postal employment- Black Top Female Management (EXCO members)	5	6	5	2	2

Source: ICASA Postal Questionnaire, December 2021 – 2025.
Note: *we had low response rate from unreserved postal sector*

7 Conclusion

South Africa's ICT sector is in a decisive transition. Telecommunications remain the growth anchor, while broadcasting and postal confront structural pressure from digital substitution. Affordability, coverage and usage metrics continue to improve overall especially for mobile yet fixed broadband affordability and rural 5G gaps constrain inclusive progress. Investment has pivoted toward fixed networks, but resilience costs (theft and backup power) weigh on expansion. The evidence across revenue, subscriptions, traffic, employment, transformation and international benchmarks points to steady gains with uneven outcomes that require targeted interventions.

Key cross vs sector insights:

1. Sector performance: modest aggregate growth in 2025, with telecoms up while broadcasting and postal declined; five-year trends confirm broadband-centric value creation and continued legacy contraction.

2. Access & affordability: national 4G ~universal; 5G expanded materially but remains uneven across rural provinces; mobile data basket below the 2% ITU benchmark while entry-level fixed broadband remains above target.

3. Usage & capacity: fixed broadband subscriptions (fibre-led) and international bandwidth capacity grew strongly; mobile market matured with slower SIM growth but deeper data adoption (including M2M).

4. Investment & resilience: capex mix shifted toward fixed networks; theft costs surged while vandalism eased; elevated battery/generator spend signals persistent energy risk exposure.

5. Employment & transformation: overall jobs decreased in 2025, with steep declines in postal and growth in broadcasting; procurement transformation remains strong in telecoms, while leadership representation requires continued attention.

Priority interventions:

1. Lower fixed entry costs: reduce wholesale inputs and streamline municipal wayleaves; expand open-access models to bring entry-level fixed broadband closer to the 2% of monthly GNI p.c. target.

2. Close rural 5G gaps: align obligations-linked incentives, passive/active sharing and permitting reforms to extend next-gen coverage beyond metros and secondary cities.

3. Harden infrastructure & power resilience: coordinate critical-asset protection and hybrid-power solutions so security and energy costs no longer crowd out expansionary capex.

4. Scale workforce reskilling: pivot legacy roles into fibre/5G/IoT, cybersecurity and digital content; protect diversity gains through leadership-pipeline development.

5. Accelerate public-facility connectivity: strengthen monitoring, enforcement and incentives to move materially beyond ~20% completion across schools, clinics, libraries and traditional authorities.

6. Broadcasting – Stabilise via technology-neutral rules that recognise OTT alongside licensed services; reinforce local-content objectives with predictable pipelines and measurable SMME participation; modernise audience-measurement and advertising trading to follow viewers across linear/streaming and unlock monetisation.

7. Postal – Execute an operational reset around reliability and visibility: set on-time delivery SLAs with public reporting; implement end-to-end scanning/notifications across letters, parcels and EMS; remediate address databases and scale virtual PO boxes; partner on last-mile (lockers/agency points) to compete effectively in e-commerce fulfilment.

Bottom line: continued regulatory oversight, targeted investment and policy innovation can translate network build-out into inclusive outcomes supporting households, learners, patients and SMMEs while restoring South Africa's momentum on global benchmarks.

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https://www.broadbandcommission.org

APPENDICES

Appendix 1: ICASA questionnaire respondents, December 2025

ICASA questionnaire respondents, December, 2025	
Telecommunication's Licensees	
1	Access Global Comunication (PTY) Ltd
2	Africa Wifi Com (PTY) LTD
3	Afrihost SP (Pty) Ltd
4	Airpark Beaufort West
5	Amatole Telecommunications Services (Pty) Ltd
6	Amobia Communications (Pty) Ltd
7	ASK Internet Technologies CC
8	AT&T South Africa (Proprietary) Limited
9	Axxess DSL
10	Backspace Technology Pty Ltd
11	Bethnet cc
12	Blue Shadow Investments (Pty) Ltd
13	Borwood Communications (Pty) Ltd
14	Borwood Xtech (Pty) Ltd
15	Carfone OFS (Pty) Ltd
16	Catalytic Connections (Pty) Ltd
17	Cell C Limited
18	China TelecomSouth Africa (Pty) Ltd
19	Compatel Africa
20	Comtel Communications Pty Ltd
21	Connectivity Services (Pty) LTD
22	Cool Ideas Service Provider (Pty) Ltd
23	CRAZYWEB TECH PTY LTD
24	CUBE ICT SOLUTIONS (PTY) LTD
25	Cutman Bush Net
26	CWNET CC
27	DAKOTA SOFTWARE SERVICES
28	Datonet (Pty) Ltd
29	Dimension Data
30	Dube TradePort Corporation
31	Equation Business Solutions
32	Evolution Tel (Pty) Ltd
33	Fibre To The Apartment (Pty)Ltd
34	FIXED MOBILE COMMUNICATIONS (PTY) LTD

35	Frogfoot Networks (Pty) Ltd
36	Fusion Voice and Data
37	Future Perfect Corporation CC T/A Vanilla
38	Glidepath Group of Companies (Pty) Ltd (“Glidepath”)
39	Group Lumen South Africa (Pty) Ltd.
40	Heinrich Heunis
41	Hero Telecoms Proprietary Limited
42	Hollywood Connect (Pty) Ltd
43	Huge TNS Pty Ltd
44	Hymax Talking Solutions (Pty) Ltd
45	ICTGlobe Management
46	Imply I.T Pty Ltd
47	Infogro PTY LTD
48	InterActive Systems Designs (Pty) Ltd
49	Interexcel World Connection
50	Internet Uncapped cc
51	Izak Schalk Willem van Zyl
52	Kibo Connect (Pty) Ltd
53	LaserNet (Pty) Ltd
54	LBJ GROENEWALD
55	Letaba Networks (Pty) Ltd
56	Linux Based Systems Design SA (Pty) Ltd
57	Liquid Telecommunications South Africa (Pty) Ltd
58	Magnolia Tree Fibre (Pty) Ltd
59	MannIT(pty)Ltd
60	Maziv (Pty) Ltd
61	Metro Fibre
62	MEZOBYTE (PTY) LTD
63	Mobile Telephone Networks
64	Mweb (Pty) Ltd
65	Mzanzi Lisetta Media and Printing (Pty) Ltd
66	Netwide Internet Services
67	Network & Computing Consultants (Pty) LTD
68	NW Internet Service CC
69	ORANGE BUSINESS SERVICES SOUTH AFRICA
70	OTHOS TELECOMMUNICATIONS (PTY) LTD
71	Platoon Trade and Invest 149 (PTY) LTD TA Wanatel PTY) LTD
72	Product Merchandiser

73	Pronto Computer Solutions
74	Radiospoor (Welkom) Pty Ltd
75	rain (Pty) Ltd
76	Reunert Limited
77	Saicom Voice Services (Pty) Ltd
78	SCAN RF Projects (Pty) Ltd
79	Simigenix (Pty) Ltd
80	Skillmix
81	SKYBER WIFI ENTERPRISES
82	SMS CELLULAR SERVICES PTY LTD
83	Sonic Computers & WiFi CC
84	Sonic Infraco (Pty) Ltd
85	Technolutions Connected Services Holdings (PTY) LTD
86	Telkom
87	Telviva (Pty) Ltd
88	Thinkspeed Pty (Ltd)
89	TT CONNECT (PTY) LTD
90	Urban Wisp
91	Viva Telecoms CC
92	Vodacom
93	Vox Telecommunications (Pty) Ltd
94	Voys Telecoms SA (Pty) Ltd
95	Wibersolutions (Pty) Ltd
96	Wilderness ISP (Pty) Ltd
97	Wispernet (Pty) Ltd
98	Xlink Communications
99	ZA GAS cc
100	Zing Fibre (Pty) Ltd
101	Zoom Fibre (PTY) Ltd
102	Zululand Wireless Network CC
Broadcasting Licensees	
1	702
2	947
3	7441 FM
4	Bokone-Bophirima FM
5	BUSH RADIO
6	Cape Pulpit
7	Cape Talk

8	Deukom (Pty) Ltd.
9	etv (Pty) Ltd
10	Gateway Radio 89.6fm
11	GM FM 89 DOT 7MHZ NPC
12	Gold FM
13	GOOD NEWS COMMUNITY RADIO
14	Groot FM
15	Helderberg FM
16	Impact Radio
17	ISAJONISI YOUTH RADIO
18	K FM
19	KingFisher FM
20	Lekoa Multi-Media and Communication DC
21	Mbhashe Community Radio Station
22	Mphahlele FM
23	MultiChoice (Pty) Ltd
24	New Castle FM
25	Ngqushwa FM
26	No Name
27	Paarl967 FM
28	Pretoria FM NPC
29	Radio Atlantis 107.9 FM
30	Radio Disa NPC
31	Radio iGagasi 99.5 (Pty) Ltd
32	Radio Islam
33	Radio Mafisa
34	Radio Maluti NPC
35	Radio NFM NPC
36	RADIO TEEMANENG
37	RADIO TYGERBERG 104FM NPC
38	Rainbow Community Broadcaster NPC
39	Rainbow Community Broadcaster NPC
40	SABC RADIO SERVICES
41	SABC TV SERVICES
42	UMOYA COMMUNICATIONS (PTY) LTD T/A ALGOAFM
43	UNIVEN COMMMUNITY RADIO
44	West Rand Media House
45	Witzenberg Radio

46	Youth Empowerment Network
47	Zone Broadcasting (Pty) Ltd
Postal Services Licensees	
1	Royale Africa
2	NIGHTWING couriers
3	Post Office
4	Postnet South Africa
5	Primetime Express
6	RC Couriers
7	The Courier Guy

Appendix 2: Definitions of Telecommunications categories

Definitions of Telecommunications categories	
ICT	Information Communication Technology
ITU	International Telecommunication Union
SADC	Southern African Development Community
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 mobile-broadband 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 wireless-broadband, 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
Other mobile services revenue refers to any mobile revenue excluding mobile data services, voice services, text and multimedia messaging services and outbound roaming.
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) fixed-line subscriptions. It is also known as voice over broadband (VoB), and includes VoIP subscriptions through fixed wireless, DSL, cable, fibre optic and other fixed-broadband 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 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-to-fixed telephone traffic refers to completed local and domestic long-distance fixed-telephone 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 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.
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
Telecoms 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 to all suppliers
Total spend on all goods and services procured by an Entity.
Procurement Spend to all suppliers based on the B-BBEE Procurement Recognition Levels
Total 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.
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) fixed-line subscriptions. It is also known as voice over broadband (VoB), and includes VoIP subscriptions through fixed wireless, DSL, cable, fibre optic and other fixed-broadband 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 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-to-fixed telephone traffic refers to completed local and domestic long-distance fixed-telephone 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 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

Broadcasting definitions used.

Indicators	Indicator Definition
Total revenue	The aggregated revenue includes Total Broadcasting Services Revenue and should tie back to your overall revenue
Total broadcasting services revenue	Sum of revenue from all broadcasting services specifically itemised below (in local currency at current prices).
Revenue from Broadcasting Promotions (with flighting code).	Revenue from Broadcasting Promotions (with flighting code). Excludes revenue from promotions without flighting code.
Total of any other revenue	Any other revenue not specifically itemised above
Broadcasting employment - Total	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).
Broadcasting employment-female	Persons employed by all broadcasting licensees; female should be expressed in terms of full-time staff equivalents.
Broadcasting employment-people living with disabilities.	Persons employed by all broadcasting licensees who are living with disabilities.
Broadcasting employment-Unskilled	Persons employed by all broadcasting licensees who possess no particular skills and usually do not require formal education.

Broadcasting employment- Semiskilled	Persons employed by all broadcasting licensees who have or requires less training.
Broadcasting employment- skilled	Persons employed by all broadcasting licensees who have special skill, training, knowledge, and (usually acquired) ability in their work. A skilled worker may have attended a college, university or technical school.
Broadcasting employment- Top Management (EXCO members)	Persons employed by all broadcasting licensees, Top Management, should be expressed in terms of full-time staff equivalents. This should include Exco and other Executives.
Broadcasting employment- Black Top Management (EXCO members)	Persons employed by all broadcasting licensees, Black Top Management, should be expressed in terms of full-time staff equivalents. This should include Exco and other Executives.
Broadcasting employment- Black Top Female Management (EXCO members)	Persons employed by all broadcasting licensees, Black Top Female Management, should be expressed in terms of full-time staff equivalents. This should include Exco and other Executives.
Investment	Total annual investment in broadcasting services, also referred to as annual capital expenditure, refers to the investment during the financial year in broadcasting services. The indicator is a measure of investment in broadcasting 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 broadcasting software or equipment for internal use.
Total Number of Local independent productions	Local independent television product means a production of television content by a person not directly or indirectly employed by any broadcasting service licensee; or by a person who is not controlled by or is in control of any broadcasting services.
Total Number of international independent productions	International independent television product means a production of television content by a person not directly or indirectly employed by any broadcasting service licensee; or by a person who is not controlled by or is in control of any broadcasting services.

Postal Sector Definitions used.

Indicators required	Indicator Definition
Postal employment- female	Persons employed by all Postal licensees; female (should be expressed in terms of full-time staff equivalents).
Postal employment- People living with disabilities	Persons employed by all Postal licensees who are living with disabilities.
Postal employment- Unskilled	Persons employed by all Postal licensees who possess no skills and usually do not require formal education.
Postal employment- Semiskilled	Persons employed by all Postal licensees who have or require less training.
Postal employment- skilled	Persons employed by all Postal licensees who have special skill, training, knowledge, and (usually acquired) ability in their work. A skilled worker may have attended a college, university or technical school.
Postal employment- Top Management (EXCO members)	Persons employed by all Postal licensees, Top Management, should be expressed in terms of full-time staff equivalents. This should include Exco and other Executives.
Postal employment- Black Top Management (EXCO members)	Persons employed by all Postal licensees, Black Top Management, should be expressed in terms of full-time staff equivalents. This should include Exco and other Executives.
Postal employment- Black Top Female Management (EXCO members)	Persons employed by all Postal licensees, Black Top Female Management, should be expressed in terms of full-time staff equivalents. This should include Exco and other Executives.
Letter delivery services (Registered letters)	Letter post: letter-post items essentially consist of letters, postcards, printed papers (newspapers, periodicals, advertising, etc.), small packets, items for the blind and, as applicable in the domestic service, commercial papers or samples of merchandise; items should not exceed 2 kg in weight
Letters: Domestic service and international outbound (International Mail Centre Volumes)	Letter post: letter-post items essentially consist of letters, postcards, printed papers (newspapers, periodicals, advertising, etc.), small packets, items for the blind and, as applicable in the domestic service,

	commercial papers or samples of merchandise; items should not exceed 2 kg in weight
Letters: Domestic service and international outbound (Local Volumes)	Letter post: letter-post items essentially consist of letters, postcards, printed papers (newspapers, periodicals, advertising, etc.), small packets, items for the blind and, as applicable in the domestic service, commercial papers or samples of merchandise; items should not exceed 2 kg in weight
Parcel delivery services	Parcels: non-express items containing mainly goods. Parcels included should not exceed 50 kg
Parcel: Domestic service and international outbound (International Mail Centre Volumes)	Parcels: non-express items containing mainly goods. Parcels included should not exceed 50 kg
Parcel: Domestic service and international outbound (Local Volumes)	Parcels: non-express items containing mainly goods. Parcels included should not exceed 50 kg
Express delivery services (EMS)	Express items: items containing correspondence, documents and goods which are processed in the most rapid way. Again, the items included should not exceed 50 kg.
Express: Domestic service and international outbound (International Mail Centre Volumes)	Express items: items containing correspondence, documents and goods which are processed in the most rapid way. Again, the items included should not exceed 50 kg.
Express: Domestic service and international outbound (Local Volumes)	Express items: items containing correspondence, documents and goods which are processed in the most rapid way. Again, the items included should not exceed 50 kg.
Mail delivery Parameters (Physical Address %)	Mail delivery Parameters with Physical Address in %
Mail delivery Parameters (PO Boxes %)	Mail delivery Parameters with PO Boxes in %
Number of inhabitants per postal service point	Number of inhabitants per postal service point

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 01 October 2024 -30 September 2025. 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 telecommunication revenue	**R236 424 661 613**
Total fixed line revenue	**R3 406 137 075**
Revenue from retail fixed-telephone services	R85 896 522
Revenue from fixed-telephone subscription charges	R1 603 741 136
Revenue from fixed-telephone calls	R1 716 499 417
Total Fixed Internet and data revenue	**R40 612 082 790**
Fixed Internet revenue (R)	R11 917 973 878
Revenue from fixed (wired)-broadband services	R17 987 156 906
Other wireless-broadband services revenue	R6 697 891 224
Other telecommunication services revenue, including leased lines revenue and fixed value-added telecommunication services	R4 009 060 782
Total mobile services revenue (Rm)	**R121 933 397 042**
Revenue from voice services	R28 056 129 561
Revenue from outbound roaming (R)	R1 255 381 262
Revenue from mobile data services	R65 458 817 332
Revenue from text and multimedia messaging services	R2 573 964 979
Prepaid revenue mobile voice	R19 114 934 687
Prepaid revenue mobile data	R42 115 916 083
Prepaid revenue mobile messaging	R276 570 506
Other mobile services revenue	R24 589 103 908
Total of any other revenue	**R70 473 044 705**

Interconnection revenues	R4 511 390 949
Equipment revenue	R32 123 597 978
Any other revenue	R33 838 055 778
Total telecommunication investment	**R28 416 946 567**
Annual investment in fixed-telephone services	R21 784 718
Annual investment in fixed (wired)-broadband services	R3 596 696 695
Annual investment in mobile communication services	R14 005 894 702
Infrastructure	R5 142 721 858
Expansion	R2 000 160 658
Maintenance	R1 084 729 530
Other annual investment in telecommunication services	R2 564 958 406
Fixed line subscriptions	**832 073**
Analogue fixed-telephone lines	115 689
VoIP subscriptions	469 130
Fixed wireless local loop subscriptions	30 624
ISDN voice-channel equivalents	214 470
Fixed public payphone	2 160
Mobile cellular subscriptions	**117 316 338**
Prepaid mobile-cellular telephone subscriptions	**96 520 675**
Prepaid mobile-cellular telephone subscriptions (Urban area)	91 237 041
Prepaid mobile-cellular telephone subscriptions (Rural area)	5 283 634
Postpaid mobile-cellular telephone subscriptions	**20 795 663**
Postpaid mobile-cellular telephone subscriptions (Urban area)	19 299 781
Postpaid mobile-cellular telephone subscriptions (Rural area)	1 495 882
Mobile Cellular Active Subscriptions (Active for more than 90 Days)	91 444 708
M2M mobile-network subscriptions	15 797 819
Fixed broadband subscriptions	**3 264 271**
DSL Internet subscriptions	227 420
Fibre-to-the-home/building Internet subscriptions	3 006 836
Other fixed (wired)-broadband subscriptions	30 015
Wireless-broadband subscriptions	**1 256 359**
Satellite broadband subscriptions	10 597
Terrestrial fixed wireless broadband subscriptions	1 245 762
Active mobile broadband subscriptions	**123 556 024**
Standard mobile-broadband subscriptions	65 255 019

Dedicated mobile-broadband subscriptions	58 301 005
Mobile data users	45 161 330
Fixed line traffic	**3 303 137 404**
Local fixed-to-fixed telephone traffic, in minutes	1 921 206 650
Long-distance fixed-to-fixed telephone traffic, in minutes	1 381 930 754
Fixed-to-mobile telephone traffic	6 500 257 489
International incoming and outgoing fixed-telephone traffic	**188 694 125**
International outgoing fixed-telephone traffic, in minutes	121 958 248
International incoming fixed-telephone traffic, in minutes	66 735 877
Total national mobile traffic	**88 631 886 709**
Outgoing mobile traffic to same mobile network	65 361 910 449
Mobile to other mobile networks	21 045 637 809
Mobile to fixed	2 224 338 451
International outgoing from mobile	189 841 108
International incoming to mobile	152 394 267
SMS traffic	8 534 201 539
SMS international traffic	55 886 467
Mobile data traffic	6 737 613
3G population coverage	99,85%
4G/LTE etc. population coverage	99,50%
Geographical Broadband Coverage	82,08%
5G Coverage	58,02%
International Internet bandwidth (Mbps) capacity	**4 025 385**
International outgoing Internet bandwidth	1 165 222
International incoming Internet bandwidth	2 860 163
Smartphone subscriptions	**83 041 957**
Smartphone subscriptions	83 041 957
Batter and Generator used when there is no electricity (Loadshedding), and Revenue spend during this period	
Total Number of batteries	84 829
Total Number of Generators	1969
Total Amount spend on batteries	R387 681 250
Total Amount spend on Generators	R426 761 377
Infrastructure Expenditure	
Theft	R201 479 035
Vandalism	R140 926 700
ICT Sector Black Economic Empowerment Measures	
Telecommunication employment -Total	29 905

Telecommunication employment- female	11 633
Telecommunication employment- People living with disabilities	447
Telecommunication employment- Unskilled	782
Telecommunication employment- Semi skilled	4 330
Telecommunication employment- skilled	21 077
Telecommunication employment- Youth (male) 35 years and below	5 232
Telecommunication employment- Youth (female) 35 years and below	3 875
Telecoms employment- Top Management (EXCO Members)	235
Telecoms employment- Black Top Management (EXCO Members)	71
Telecoms employment- Black Top Female Management (EXCO Members)	27
Procurement Spend from all suppliers	R191 704 967 478
Procurement Spend from all suppliers based on the B-BBEE Procurement Recognition Levels	R180 040 208 213
Broadcasting data used	
Total broadcasting services revenue	**R33 028 322 880**
Broadcasting Advertising Revenue	**R5 967 766 029**
Broadcasting Subscriptions Revenue	**R24 475 706 968**
Revenue from Broadcasting Promotions (with flighting code).	**R30 777 966**
Revenue from sponsorhips	**R527 110 867**
Revenue from Government or State grant	**R207 914 334**
Revenue from donations	**R15 104 630**
Revenue from infomercials	**R19 191 344**
Revenue from membership fees	**R2 887 604**
Revenue from international content sales (exports)	**R12 000**
Revenue from digital platforms (OTT, streaming)	**R82 634 432**
Total of any other revenue	**R1 699 216 706**
Itemised expenditure	**R17 224 837 299**
Number of Pay TV subscribers	6 715 495
Broadcasting employment -Total	3 814
Broadcasting employment- female	1 942
Broadcasting employment- people leaving with disabilities	103
Broadcasting employment- Unskilled	141
Broadcasting employment- Semi skilled	660
Broadcasting employment- skilled	2 172
Broadcasting employment- Youth (male) 35 years and below	479

Broadcasting employment- Youth (female) 35 years and below	515
Broadcasting employment- Top Management (EXCO members)	119
Broadcasting employment- Black Top Management (EXCO members)	83
Broadcasting employment- Black Top Female Management (EXCO members)	47
Procurement Spend from all suppliers	**R4 082 013 949**
Procurement Spend from all suppliers based on the B-BBEE Procurement Recognition Levels	**R2 808 947 321**
Total Number of Television (stations and distributors)	21 465 953
Number of Digital Satellite Stations	39
Number of Digital Terrestrial Stations	55
Number of Analogue Terrestrial Stations	4
Number of Signal Distributors	12
Number of set-top boxes	21 465 837
Number of Content Distributors	6
Investment	**R41 564 151**
Infrastructure	**R5 720 253**
Expansion	**R742 161**
Maintenance	**R21 772 683**
Others	**R13 329 055**
Total Number of Local independent productions	95
Total Number of international independent productions	43
Total Number of productions by the broadcasters	157
Total expenditure on Local independent productions (In Rand)	**R1 197 391 160**
Total expenditure on international Independent productions (In Rand)	**R508 925 876**
Total expenditure on broadcaster productions (In Rand)	**R1 606 143 241**
Postal services data used	
Total Postal Sector revenue	**R4 329 534 335**
Retail products revenue	**R2 365 000**
Services rendered - Postal	**R847 765 000**
Services rendered - Agency and money transfer	**R296 027 000**
Services rendered - Courier	**R3 165 771 908**
Total of any other revenue	**R17 605 427**
Postal employment -Total	7 544
Postal employment- female	4 378
Postal employment- Disabled	525
Postal employment- Unskilled	1240
Postal employment- Semi skilled	5 485
Postal employment- skilled	987

Postal employment- Youth (male) 35 years and below	255
Postal employment- Youth (female) 35 years and below	224
Postal employment- Top Management (EXCO members)	21
Postal employment- Black Top Management (EXCO members)	6
Postal employment- Black Top Female Management (EXCO members)	2
Procurement Spend from all suppliers	**R154 214 576**
Procurement Spend from all suppliers based on the B-BBEE Procurement Recognition Levels	**R108 268 985**
Letter delivery services (Registered letters)	**148 044 754**
Letters: Domestic service and international outbound (International Mail Centre Volumes)	5 374 805
Letters: Domestic service and international outbound (Local Volumes)	142 669 949
Parcel delivery services	**2 896 760**
Parcel: Domestic service and international outbound (International Mail Centre Volumes)	91 073
Parcel: Domestic service and international outbound (Local Volumes)	2 805 687
Express delivery services (EMS)	**1 322 533**

Source: ICASA Telecommunications, TV Broadcasting and Postal Questionnaires, December 2025.