THIRD QUARTER SECTOR STATISTICS REPORT FINANCIAL YEAR 2023/2024

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LIST OF ACRONYMS

DoS	Denial-of-Service
EASSy	Eastern Africa Submarine Cable Systems
FTTH/O	Fibre-To-The-Home/Office
FY	Financial Year
Gbps	Gigabits per second
ICTs	Information and Communication Technologies
KE-CIRT/CC	National Kenya Computer Incident Response Team/Coordination Centre
LION2	Lower Indian Ocean Network
Mbps	Megabits per second
MoU	Minutes of Use
MVNO	Mobile Virtual Network Operator
SEACOM	Sea Sub-Marine Communications Limited
SIM	Subscriber Identification Module
SMS	Short Messaging Service
TEAMS	The East African Marine System
PEACE	Pakistan & East Africa Connecting Europe
VoIP	Voice over Internet Protocol
FM	Frequency Modulation
3G	Third Generation
4G	Fourth Generation
5G	Fifth Generation
DDOS	Distributed Denial of Service
OTT	Over-The-Top media services

PRELIMINARY NOTES

This report is based on data provided by licensees in the ICT sector as per their license conditions and obligations. The information provided herein is subject to review during the subsequent quarter in case of any revisions or updates from the licensees.

This report has been prepared in line with best practice and adheres to International Telecommunications Union (ITU) standards on collection of administrative/supply side data on telecommunications/Information and Communications Technologies https://www.itu.int/en/ITU-D/Statistics/Documents/publications/handbook/2020/ITUHandbookTelecomAdminData2020_E_rev1.pdf and also the guiding manual available on our website https://www.ca.go.ke/reports-and-studies?page=2 . These manuals provide clarity on how the various indicators are defined, methodologies for data collection, scope of the indicators, and any limitations that may be related to the specific indicators.

The main objective of the report is to measure and monitor availability and accessibility of ICT services by Kenyans from the supply perspective. It is key to note that this report **does not include demand side data** (data on usage/uptake of ICTs from the consumer perspective) as this information is collected through National ICT Surveys and reported separately as per ITU standards https://www.itu.int/en/ITUD/Statistics/Documents/publications/manual/ITUManualHouseholds2020_E.pdf. The Authority collaborates with the Kenyan National Bureau of Statistics (KNBS) to collect the demand side data through National Surveys.

SUMMARY OF ICT INDICATORS

The Third Quarter Sector Statistics Report provides the performance and trends in the ICT sector for the period 1st January to 31st March 2024 in:

1. Mobile Network services
2. Fixed Network services
3. Courier services
4. Broadcasting services
5. Frequency spectrum management
6. Electronic transactions and Cyberspace management

Indicator/Period		Q3(Jan-Mar 24)	Q2(Oct-Dec 23)	Quarterly Variation (%)
MOBILE NETWORK SERVICES				
Subscriptions to Mobile Services	Total Mobile (SIM) Subscriptions	68,046,393	66,745,709	1.9
	Machine-to-Machine (M2M) Subscriptions	1,607,536	1,515,338	6.1
Mobile Money Transfer Services	Number of Registered Mobile Money Agents	339,282	327,162	3.7
	Mobile Money Subscriptions	38,649,456	38,002,803	1.7
Mobile Data and Broadband Subscriptions	Mobile Data Subscriptions	51,276,279	51,015,188	0.5
	Mobile Broadband Subscriptions	37,236,783	36,518,744	2.0
Mobile Phone Devices	Feature Phones	31,211,780	31,840,598	-2.0
	Smartphones	34,500,712	33,613,828	2.6
Domestic Mobile Traffic				
Mobile Voice Traffic (Minutes)	On-Net Voice Traffic	21,629,564,931	20,228,439,918	6.9
	Off-Net Voice Traffic	3,539,870,480	3,338,856,198	6.0
	Mobile to Fixed Network	16,081,876	14,721,036	9.2
Mobile SMS Traffic	SMS On-Net	11,812,948,311	12,398,385,950	-4.7
	SMS Off-Net	1,612,440,587	1,702,603,764	-5.3
International Mobile Traffic				
Mobile Voice Traffic (Minutes)	International Incoming Mobile Voice Traffic	113,593,511	91,589,439	24.0
	International Outgoing Mobile Voice Traffic	188,999,700	181,746,037	4.0
Mobile SMS Traffic	International Incoming SMS	9,122,335	9,831,805	-7.2
	International Outgoing SMS	4,197,408	3,924,444	7.0
Roaming Traffic				
Out-bound Roaming Traffic	Out-bound Roaming Incoming Voice Traffic (Minutes)	159,086,813	152,411,844	4.4
	Out-bound Roaming Outgoing Voice Traffic (Minutes)	14,501,111	11,507,662	26.0
	Out-bound Roaming Incoming SMS	73,010,024	57,692,783	26.5
	Out-bound Roaming Outgoing SMS	5,783,427	6,225,021	-7.1
	Data Volumes (MB)	107,662,157	130,771,847	-17.7
In-bound Roaming Traffic	In-bound Roaming Incoming Voice Traffic (Minutes)	124,387,268	121,030,181	2.8
	In-bound Roaming Outgoing Voice Traffic (Minutes)	4,878,081	4,923,206	-0.9
	In-bound Roaming Incoming SMS	44,872,531	45,185,436	-0.7
	In-bound Roaming Outgoing SMS	1,865,885	1,831,735	1.9

Indicator/Period		Q3(Jan-Mar 24)	Q2(Oct-Dec 23)	Quarterly Variation (%)
	Data Volumes (MB)	347,558,317	301,457,556	15.3
FIXED NETWORK SERVICES				
Fixed Voice Subscriptions	Fixed Line Subscriptions	8,670	9,027	-4.0
	Fixed Wireless Subscriptions	1,503	1,457	3.2
	Fixed VoIP Subscriptions	60,842	57,356	6.1
Domestic Fixed Voice Traffic	Fixed line-Fixed line	120,072	130,811	-8.21
	Fixed Wireless-Fixed Wireless	263,947	255,122	3.5
	Fixed to Mobile	19,799,348	22,509,738	-12.0
International Fixed Voice Traffic	Incoming Fixed Voice Traffic	6,302,624	5,255,274	19.9
	Outgoing Fixed Voice Traffic	1,042,722	960,859	8.5
	Outgoing Fixed VOIP	555,414	544,080	2.1
Fixed Data and Broadband Services	Fixed Data/internet subscriptions	1,397,848	1,332,013	4.9
	Total Available International Bandwidth (Gbps)	20,744.338	17,293.743	20.0
	Total Used International Bandwidth (Gbps)	11,203.60	10,995.90	1.9
PRIVATE COURIER SERVICES				
Outgoing Domestic Letters		373,293	273,827	36.3
Outgoing Domestic Courier Items		1,797,398	1,440,828	24.7
International Outgoing Letters		263,522	403,556	-34.7
International Incoming Letters		86,227	95,077	-9.3
BROADCASTING SERVICES				
Licensed Commercial Free to Air TV		351	346	1.4
Licensed Commercial FM radio		213	212	0.5
Licensed Community Free to Air TV		9	9	0.0
Licensed Community FM Radio		80	78	2.6
DTT Subscriptions		4,465,254	4,429,112*	0.8
DTH Subscriptions		1,830,251	1,859,812*	-1.6
Cable Subscriptions		77,783	78,114	-0.4
FREQUENCY SPECTRUM MANAGEMENT				
Microwave Links Deployed		131	120	9.2
Fixed Links Decommissioned		0	33	-100.0
FM Sound Broadcasting Frequencies Assigned		2	3	-33.3
ELECTRONIC TRANSACTIONS AND CYBERSPACE MANAGEMENT				
.KE Domain		108,338	105,936	2.3
Total Cyber Threats Detected		971,440,345	1,292,285,408	-24.8

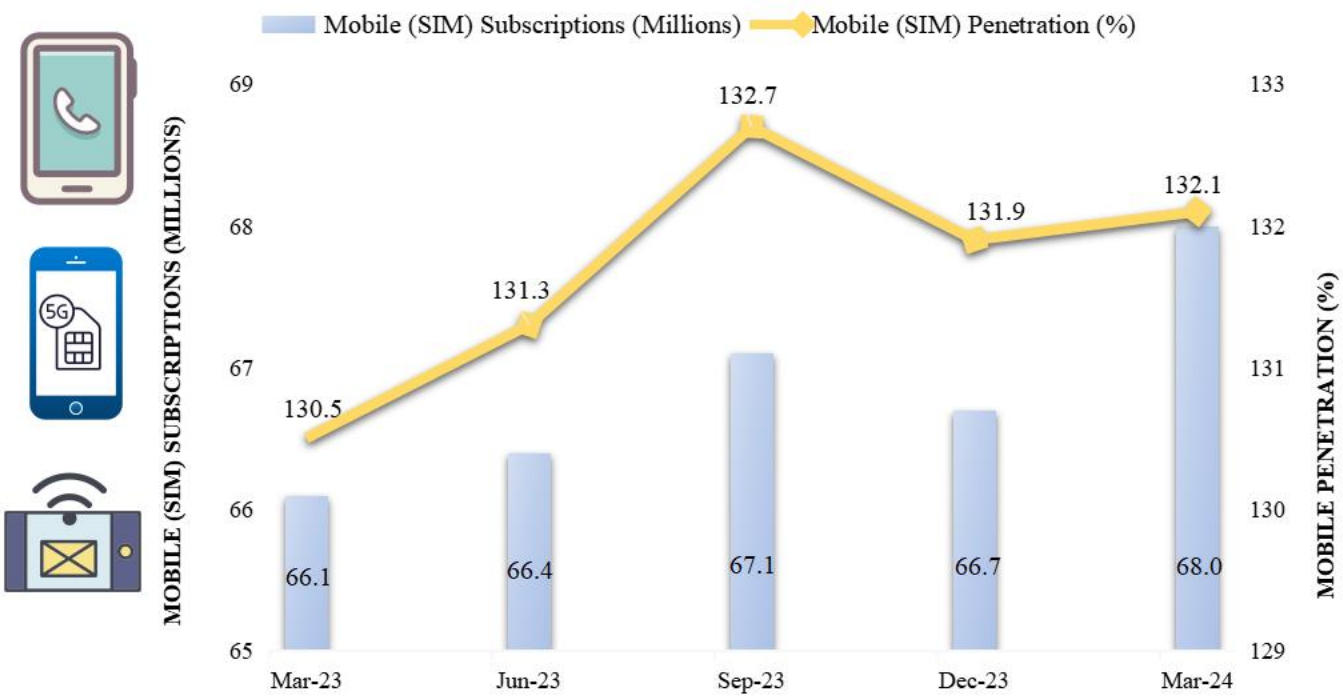
Indicator/Period	Q3(Jan-Mar 24)	Q2(Oct-Dec 23)	Quarterly Variation (%)
Total Cyber Threat Advisories	8,524,407	8,061,267	5.7
POPULATION			
Total Population in Kenya (Millions)	51,525,602**	50,600,000	1.8

**Revised data, **Economic Survey 2024*

1. MOBILE NETWORK SERVICES

1.1 Active[1] Mobile (SIM) Subscriptions and Penetration Rate

The number of active mobile (SIM) subscriptions increased to 68.0 million by end of March 2024 from 66.7 million subscriptions recorded by end of December 2023, translating to a penetration rate of 132.1 percent. The growth is attributed to customer win back campaigns run during the reference period.

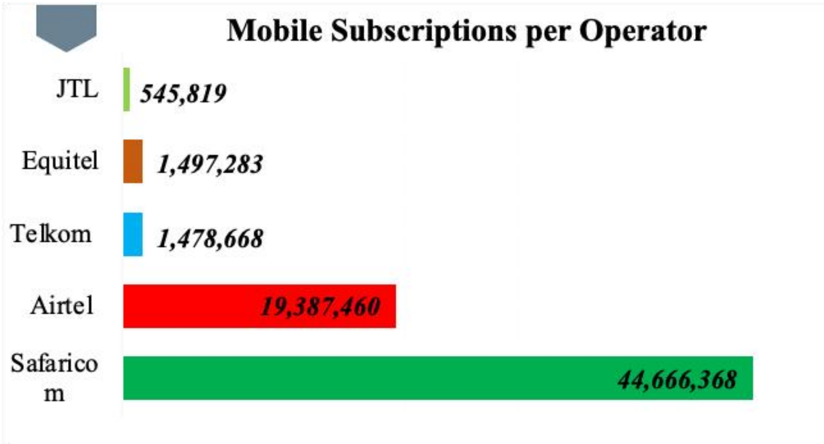


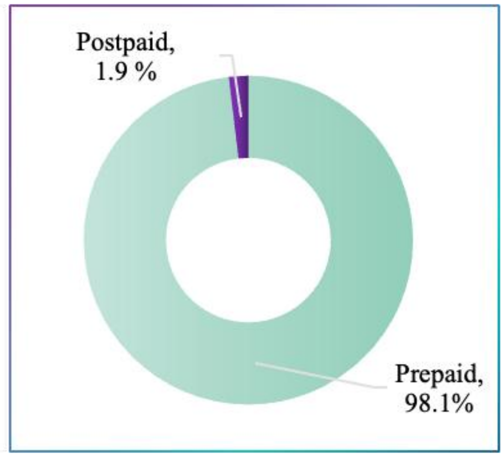
Source: CA, Operators' Returns

Figure 1: Mobile Subscriptions and Penetration

The number of active mobile (SIM) subscriptions per operator by contract type is as shown in Figure 2.

[1] Active mobile (SIM) subscription refers to any subscription that has generated revenue in the last 3 months (90 days)





Operator/Indicator	Total	Prepaid	Postpaid
Total Subscriptions	68,048,393	66,770,909	1,275,484
Safaricom PLC	44,666,368	43,529,938	1,136,430
Airtel Networks Ltd	19,858,255	19,730,013	128,242
Telkom Kenya Ltd	1,478,668	1,467,856	10,812
Finserve (Equitel)	1,497,283	1,497,283	
Jamii Telecommunications	545,819	545,819	

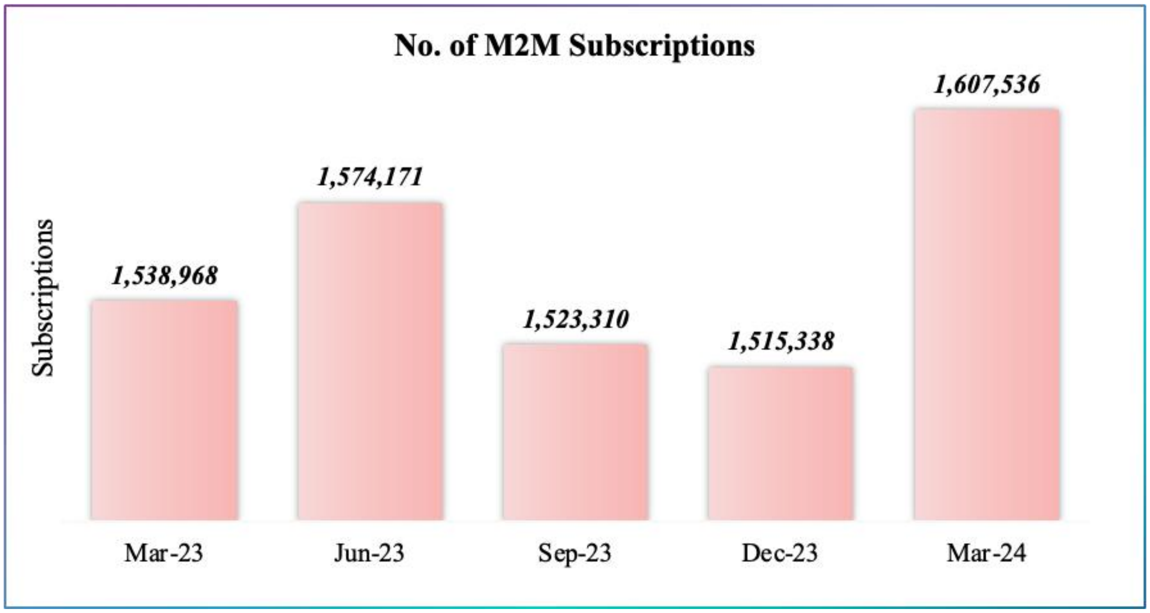
Source: *CA, Operators' Returns*

Figure 2: Mobile Subscriptions per Operator

1.2 Machine-to-Machine (M2M[2]) Subscriptions

Machine-to-Machine (M2M) subscriptions rose to 1.607 million from 1.515 million recorded last quarter as shown in Figure 3.

[2] **Machine to Machine mobile-network subscriptions (M2M subscriptions)** refer 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 are included while mobile dongles and tablet subscriptions are excluded. Only active subscriptions are counted.



*Source: CA, Operators' Returns. *Provisional Data for Telkom Kenya Limited*

Figure 3: M2M Subscriptions

1.3 Mobile Money Services

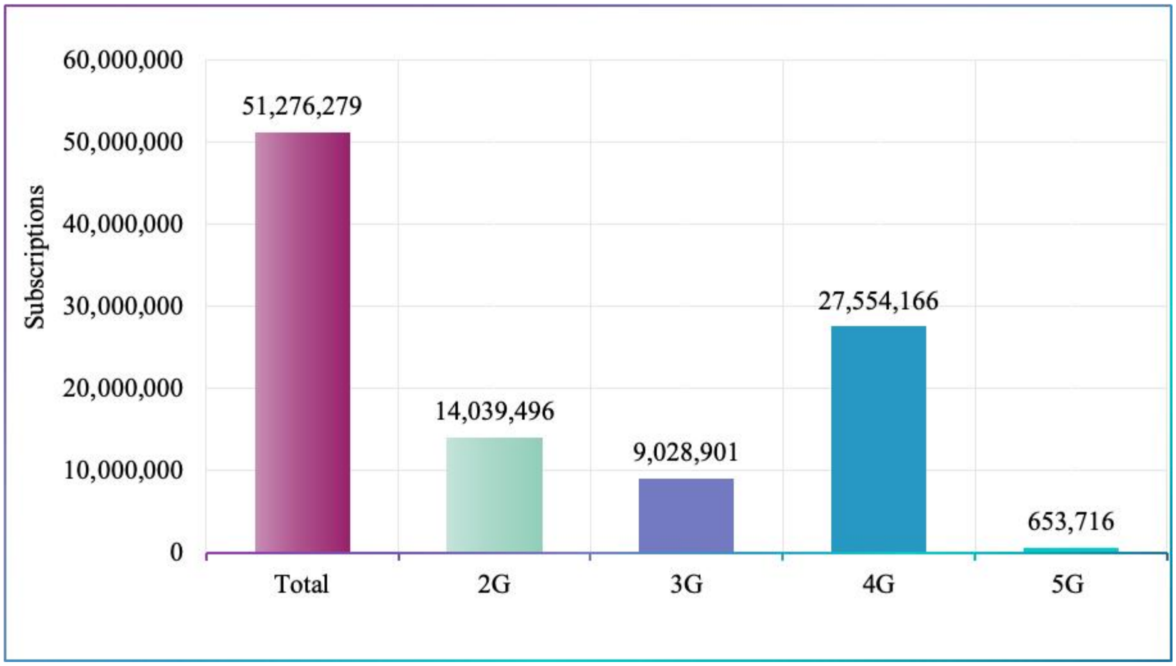
During the reference period, mobile money subscriptions grew to 38.7 million translating to a penetration rate of 75.0 percent. Although there was growth in subscriptions, the penetration rate dropped due to review of the denominator on population following the release of the 2024 Economic Survey. The growth in mobile money is attributed to the removal of withdrawal codes for transactions sent from M-Pesa to Airtel Money, which means that funds can now be transferred directly into the Airtel Money account (wallet).

Source: CA, Operators' Returns

Figure 4: Mobile Money Services

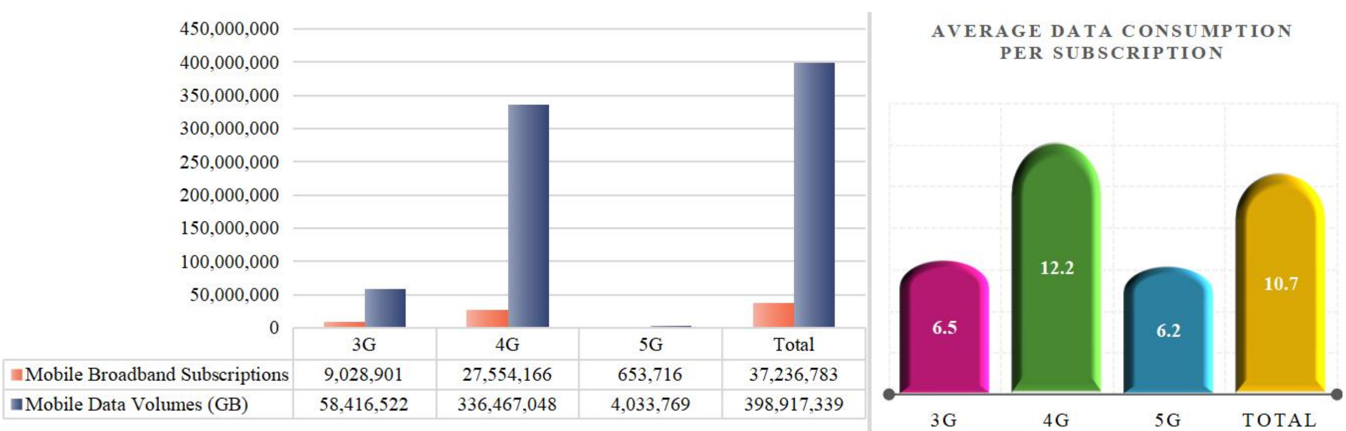
1.4 Mobile Data and Broadband[3] Services

The total mobile data subscriptions stood at 51.3 million out of which 72.6 percent were on mobile broadband as shown in Figure 5. Figure 6 shows mobile broadband subscriptions by technology with their respective data volumes consumed and the average data consumption per subscriptions.



Source: CA, Operators' Returns

Figure 5: Mobile Data and Broadband Subscriptions

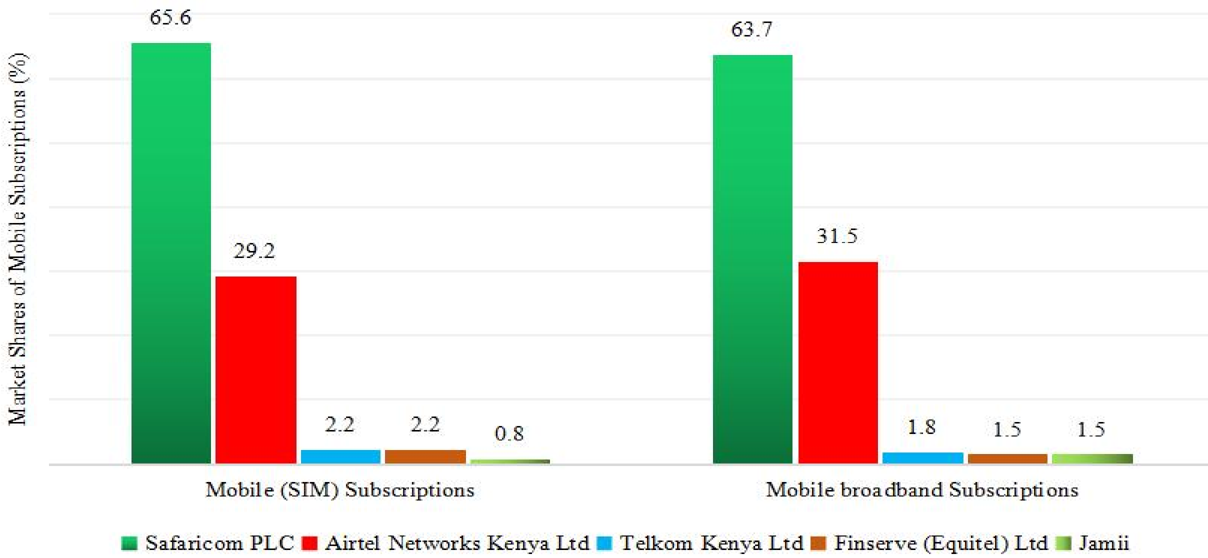


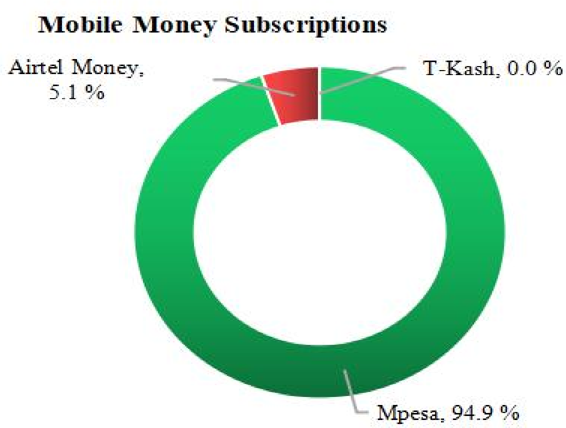
Source: CA, Operators' Returns

Figure 6: Mobile Broadband Subscription and Consumption

[3] **Mobile broadband** includes 3G, 4G and 5G. Broadband refers to connectivity that delivers interactive, secure, quality and affordable services at a minimum speed of 2Mbps (The National Broadband Strategy 2018-2023)

1.5 Market Shares in Subscriptions for Mobile Services

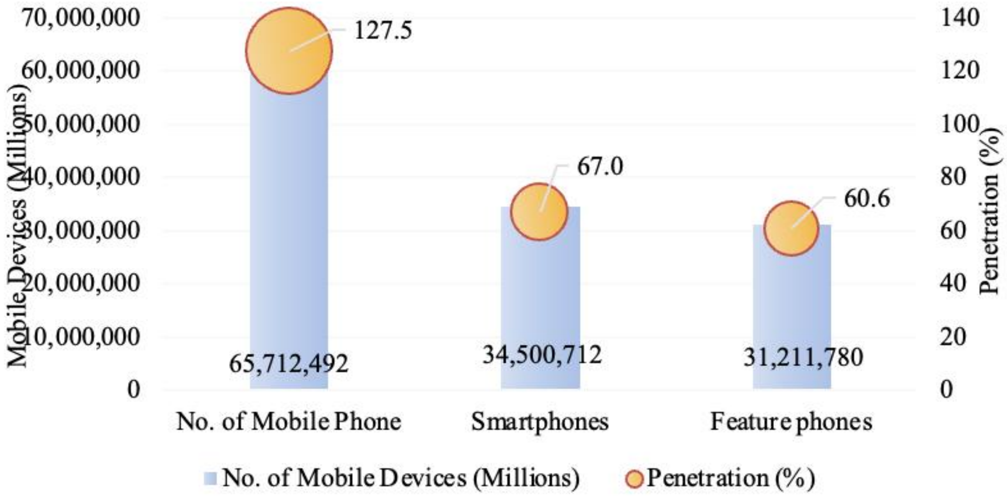




Source: CA, Operators' Returns

Figure 7: Mobile Market Shares

1.6 Mobile Phone Devices



The total number of mobile phone devices connected to mobile networks was 65.7 million with a penetration rate of 127.5 percent. Figure 8 shows the number of smartphones and feature phones connected to mobile networks with their respective penetration rates.

Source: CA' Operators Returns

Figure 8 Mobile Phone Devices

1.7 Domestic Mobile Voice Traffic (Minutes)

The volume of outgoing domestic voice traffic grew from 23.6 billion reported last quarter to 25.2 billion in the reference period. The growth is attributed to the offers and promotions run by the service providers during the referenced period some of which customers were able to make 15 minutes call within 30 minutes from the time of purchase for as low as KES 5.

Table 1:Domestic Voice Traffic (Minutes)

Indicator/Period	***Jan-Mar 24***	***Oct-Dec 23***	***Quarterly Variation (%)***
Total Outgoing Traffic	**25,185,517,287**	**23,582,017,151**	**6.8**
On-net (Own Network – Own Network)	21,629,564,931	20,228,439,918	6.9
Off-net (Own Network to Other Mobile Networks)	3,539,870,480	3,338,856,198	6.0
Mobile Network to Fixed Network	16,081,876	14,721,036	9.2

Source: CA, Operators' Returns

1.8 Minutes of Use per Call per Operator

In quarter three, the total average minutes per on-net calls remained unchanged at 1.8 minutes whereas that of off-net calls grew to 1.2 minutes from 1.1 minutes recorded in quarter two. Consumers on Airtel Networks spent more time on a single on-net call averaging 2.9 minutes from 2.8 minutes posted in the preceding quarter. Further, Safaricom PLC, Equitel and Jamii customers recorded the highest average Minutes of Use per off net call at 1.3.

Table 2: MoU per Call per Operator

Period	***Jan-Mar 24***		***Oct-Dec 23***	
Operator/Indicator	**On-net**	**Off-net**	**On-net**	**Off-net**
Total Average	**1.8**	**1.2**	**1.8**	**1.1**
Safaricom PLC	1.6	1.3	1.6	1.2
Airtel Networks Limited	2.9	1.1	2.8	1.1
Telkom Kenya Limited	1.3	1.2	1.2	1.2
Finserve (Equitel)	2.1	1.3	2.2	1.3
Jamii Telecommunications Ltd	0.1	1.3	0.1	1.3

Source: CA, Operators' Returns

1.9 Domestic Mobile SMS Traffic

There was a general decline in On-net and Off-net mobile SMS dropping by 4.7 percent and 5.3 percent to record 11.8 billion and 1.6 billion messages, respectively. This drop is attributed to the end of the long school holiday coupled with the conclusion of the festive season.

Table 3: Domestic Mobile SMS Traffic

Indicator/Period	***Jan-Mar 24***	***Oct-Dec 23***	***Quarterly Variation (%)***
Total SMS Traffic	**13,425,388,898**	**14,100,989,714**	**-4.8**
On-net (Own Network – Own Network)	11,812,948,311	12,398,385,950	-4.7
Off-net (Own Network to Other Mobile Networks)	1,612,440,587	1,702,603,764	-5.3

Source: CA, Operators' Returns

1.10 Voice and SMS Traffic per Operator

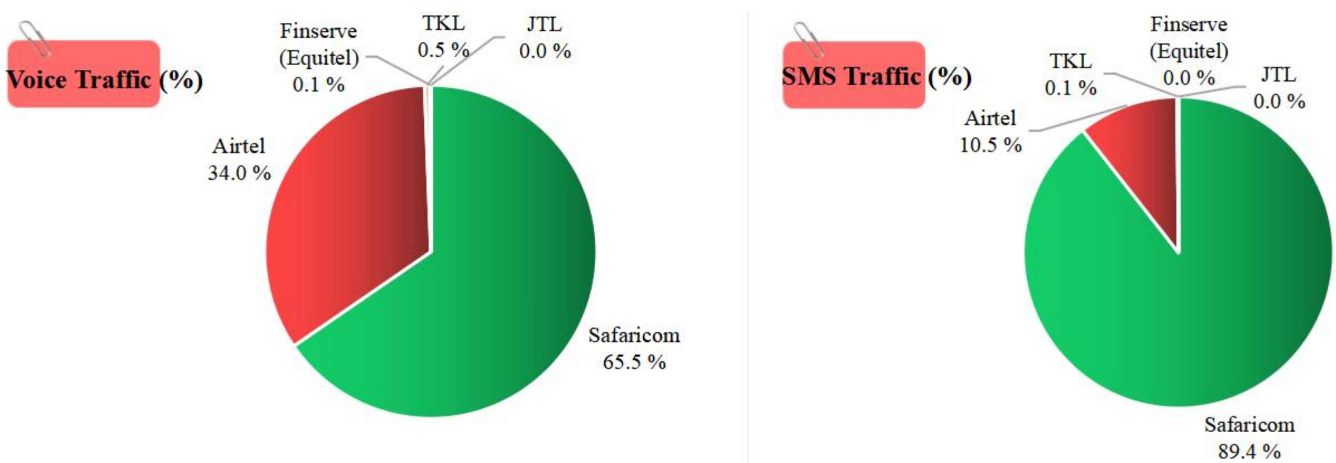
The trends for domestic voice and SMS traffic per operator are illustrated in Table 4.

Table 4: Voice and SMS Traffic per Operator

Name of Operator /Indicator			***Safaricom PLC***	***Airtel Networks Kenya Limited***	***TKL***	***Finserve***	***JTL***	***Total***
Jan-Mar 24	***Voice***	***Total***	**16,479,784,126**	**8,547,721,440**	**114,173,874**	**21,582,353**	**6,173,618**	**25,169,435,411**
		On-net	15,284,126,263	6,283,419,439	60,294,850	1,646,715	77,664	21,629,564,931
		Off-net	1,195,657,863	2,264,302,001	53,879,024	19,935,638	6,095,954	3,539,870,480
	SMS	***Total***	**12,005,043,988**	**1,404,849,864**	**3,895,251**	**10,598,894**	**1,000,901**	**13,425,388,898**
		On-net	11,172,273,290	638,526,185	1,348,118	738,636	62,082	11,812,948,311
		Off-net	832,770,698	766,323,679	2,547,133	9,860,258	938,819	1,612,440,587
Oct-Dec 23	***Voice***	***Total***	**14,923,434,381**	**8,488,455,129**	**126,252,103**	**23,544,528**	**5,609,974**	**23,567,296,116**
		On-net	13,865,262,217	6,295,165,969	66,074,238	1,873,807	63,686	20,228,439,918
		Off-net	1,058,172,164	2,193,289,160	60,177,865	21,670,721	5,546,288	3,338,856,198
	SMS	***Total***	**12,618,045,187**	**1,462,986,402**	**15,081,264**	**4,000,987**	**875,874**	**14,100,989,714**
		On-net	11,701,763,252	694,542,406	778,215	1,248,994	53,083	12,398,385,950
		Off-net	916,281,935	768,443,996	14,303,049	2,751,993	822,791	1,702,603,764

Source: CA, Operators' Returns

1.11 Market shares in Domestic Mobile Voice and SMS Traffic

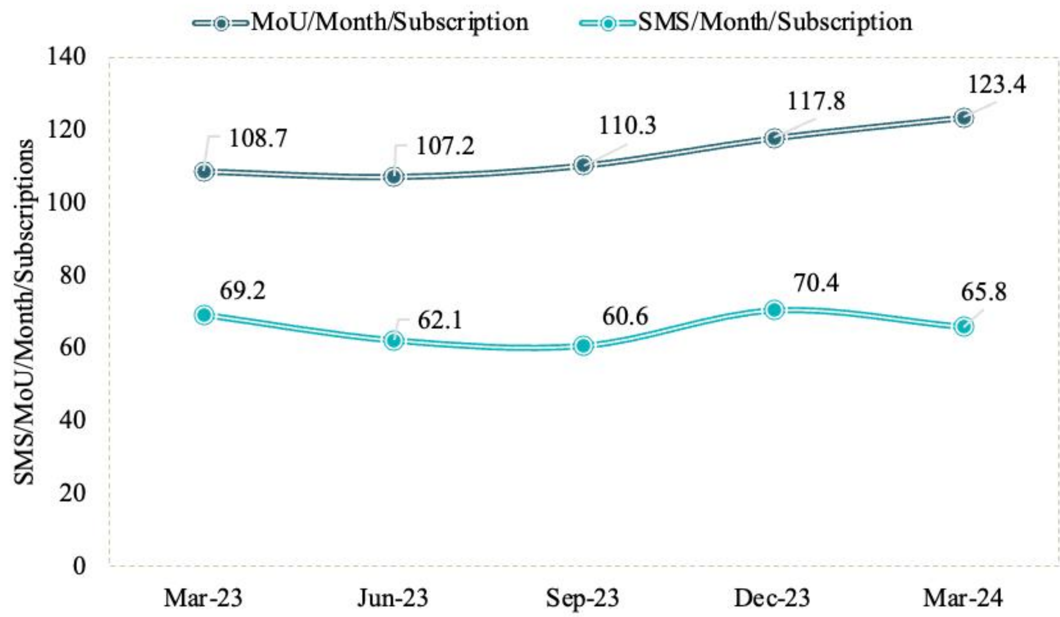


Source: CA, Operators' Returns

Figure 9: Market Shares in Domestic Mobile Voice and SMS

1.12 Minutes/Month/Subscription vs SMS/Month/Subscription

The Minutes of Use (MoU) per Month per Subscription grew during the reference period to post 123.4 minutes from 117.8 minutes reported last quarter. This growth is attributed to the general increase in mobile voice traffic during the quarter. On the other hand, short messages sent (SMS) per month per subscription dropped to 65.8 messages during the period under review from 70.4 messages reported in preceding quarter owing to the general decline in SMS during the period.



Source: CA, Operators' Returns

Figure 10: MoU/Month/Subscription vs SMS/Month/Subscription

1.13 International Mobile Traffic

During the reference period, international incoming and outgoing mobile voice traffic rose by 24.0 percent and 4.0 percent to 113.59 million minutes and 189 million minutes respectively. The international incoming mobile SMS dropped to stand at 9.12 million whereas outgoing mobile SMS rose to post 4.20 million as shown in Table 5.

Table 5: International Mobile Traffic

Indicator/Period	***Region***	***Jan-Mar 24***	***Oct-Dec 23***	***Quarterly Variation (%)***
International Incoming Mobile Voice Minutes	*EAC*	86,651,182	71,579,076	21.1
	Others	26,942,329	20,010,363	34.6
	Total	**113,593,511**	**91,589,439**	**24.0**
International Outgoing Mobile Voice Minutes	*EAC*	116,900,886	112,885,463	3.6
	Others	72,098,814	68,860,574	4.7
	Total	**188,999,700**	**181,746,037**	**4.0**
International Incoming Mobile SMS		9,122,335	9,831,805	-7.2
International Outgoing Mobile SMS		4,197,408	3,924,444	7.0

Source: CA, Operators' Returns

1.14 Roaming Traffic

Tables 6 and 7 shows the trends in outbound and inbound roaming traffic.

Table 6: Outbound Roaming Traffic

Country / Indicator	***Incoming Voice (Minutes)***	***Incoming SMS***	***Outgoing Voice (Minutes)***	***Outgoing SMS***	***Data Volumes (MB)***
Uganda	131,617,187	8,234	4,361,733	1,734,682	39,165,872
Tanzania	14,581,915	16,435,481	4,530,211	619,015	10,825,873
Rwanda	3,433,276	-	605,372	119,508	2,872,977
Burundi	2,839	1,043,609	1,947	6,451	13,121
S. Sudan	8,221,854	2,944	860,398	301,408	157,605
Democratic Republic of Congo	157,064	121,833	392,549	26,255	11,802,472
EAC Total	**158,014,135**	**17,612,101**	**10,752,210**	**2,807,319**	**64,837,920**
Others	1,072,678	55,397,923	3,748,901	2,976,108	42,824,237
Total	**159,086,813**	**73,010,024**	**14,501,111**	**5,783,427**	**107,662,157**

Source: CA, Operators' Returns

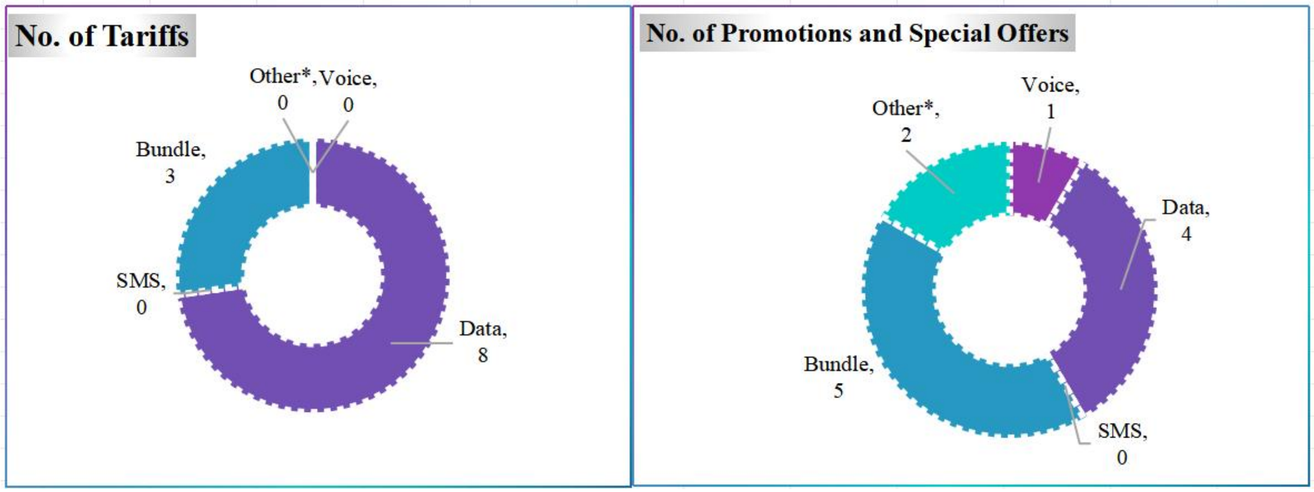
Table 7: In-bound Roaming Traffic

Country / Indicator	***Incoming Voice (Minutes)***	***Incoming SMS***	***Outgoing Voice (Minutes)***	***Outgoing SMS***	***Data Volumes (MB)***
Uganda	23,063,728	4,076,295	1,536,509	224,611	12,634,737
Tanzania	82,025,091	18,664,795	533,782	189,032	1,308,079
Rwanda	15,769,079	2,182,144	193,539	33,692	446,638
Burundi	725	1,806	673	502	55
S. Sudan	2,464,538	659,733	206,574	25,029	94,849
Democratic Republic of Congo	7,624	105,384	60,913	8,405	140,904
EAC Total	**123,330,785**	**25,690,157**	**2,531,990**	**481,271**	**14,625,262**
Others	1,056,483	19,182,374	2,346,091	1,384,614	332,933,055
Total	**124,387,268**	**44,872,531**	**4,878,081**	**1,865,885**	**347,558,317**

Source: CA, Operators' Returns

1.15 Tariffs, Promotions and Special Offers

The number of approved applications for tariffs and promotions & special offers filed by MNOs during the referenced period is as shown in Figure 11.



Source: CA, filed tariffs, promotions and special offers

Figure 11: Distribution of Tariffs, Promotions and Special Offer

1.16 Average Pay-As-You-Go (PAYG) Tariffs

Table 8: Average Pay-As-You-Go (PAYG) Tariffs

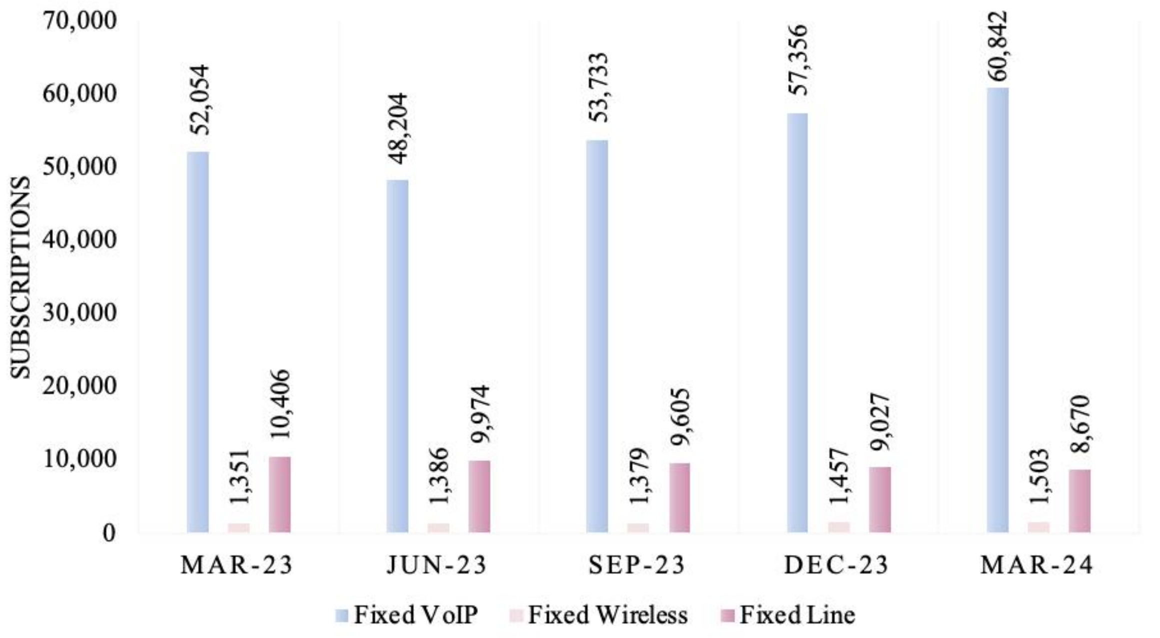
Operator/Market	***Average Voice (KES/Min)***	***SMS (KES/SMS)***	***Data (KES/MB)***
Safaricom PLC	4.87	1.20	4.87
Airtel Network Limited	2.78	1.20	4.50
	4.50	1.20	4.50
Telkom Kenya Limited	3.54	1.15	4.50
Average	**3.92**	**1.19**	**4.59**

Source: CA

2. FIXED NETWORK SERVICES

2.1 Fixed Telephone Subscriptions

Figure 12 shows fixed voice subscriptions as at 31st March 2024 with subscriptions in Fixed VoIP posting 60,842.



Source: CA, Operators' Returns

Figure 12: Fixed Voice Subscriptions

2.2 Domestic Fixed Voice Traffic

The total domestic fixed voice traffic during the quarter under review as shown in Table 9.

Table 9: Domestic Fixed Voice Traffic (Minutes)

Domestic Fixed Voice Traffic (Minutes)	*Jan-Mar 24*	*Oct-Dec 23*	*Quarterly Variation (%)*
Fixed-Fixed	120,072	130,811	-8.21
Fixed Wireless-Fixed Wireless	263,947	255,122	3.5
Fixed to Mobile	19,799,348	22,509,738	-12.0
Total Domestic Fixed Network Traffic	**20,183,367**	**22,895,671**	**-11.9**

Source: CA, Operators' Returns

2.3 International Fixed Voice Traffic

As shown in Table 10, there was a general increase in international fixed voice network traffic during the quarter under review.

Table 10: International Fixed Voice Traffic

Indicator/Period	Jan-Mar 24	Oct-Dec 23	Quarterly Variation (%)
International Incoming Fixed Network Voice traffic	6,302,624	5,255,274	19.9
International Outgoing Fixed Network Voice traffic	1,042,722	960,859	8.5
International Outgoing Fixed VoIP traffic	555,414	544,080	2.1

Source: CA, Operators' Returns

2.4 Fixed Data and Broadband Subscriptions

Fiber to the Home and subscriptions to data speeds between 2Mbps and 10Mbps recorded the highest number of fixed broadband subscriptions.

Table 11 shows the breakdown of fixed data/Internet subscriptions by technology and speed.

Table 11: Fixed Data and Broadband Subscriptions

Internet Technology/Speed	<256Kbps	=>256Kbps < 2Mbps	=>2 Mbps <10 Mbps	=>10Mbps <30 Mbps	=>30 Mbps <100Mbps	=>100 Mbps <1Gbps	=>1Gbps	Total
Cable Modem	-	-	40,769	151,209	8,907	229	-	201,114
Copper (DSL)	4	7	126	-	22	-	-	159
FTTH	-	2,070	317,646	250,220	209,622	4,312	-	783,870
FTTO	1	5,101	15,027	27,211	26,500	1,492	273	75,605
Fixed Wireless	10,624	6,161	283,438	18,936	11,391	856	-	331,406
Satellite	-	157	23	124	-	4,504	-	4,808
Other Fixed	-	78	478	235	95	-	-	886
Totals	**10,629**	**13,574**	**657,507**	**447,935**	**256,537**	**11,393**	**273**	**1,397,848**

Source: CA, Operators' Returns.

2.5 Fixed Data Subscriptions by Operator

Table 12 shows Fixed Data Subscriptions and percentage market shares per Operator.

Table 12: Fixed Data Subscriptions by Operator

Service Provider/Indicator	Number of data subscriptions	Market share (%)
Safaricom PLC	522,217	37.4
Jamii Telecommunications Ltd	315,819	22.6
Wananchi Group (Kenya) Limited*	262,753	18.8
Poa Internet Kenya Ltd	182,376	13.0
Mawingu Networks Ltd	30,908	2.2
Vilcom Network Limited	17,247	1.2
Dimension Data Solutions East Africa Limited	16,512	1.2
Liquid Telecommunications Kenya	12,869	0.9
Vijiji Connect Limited	6,591	0.5
Other Fixed Service Providers	30,556	2.2

*Source: CA Operators' Returns, * includes Wananchi Group, Wananchi Telecom, and Simbanet*

2.6 International Bandwidth

The total available International Internet bandwidth capacity in the country grew by 20.0 per cent to 20,744.338 Gbps. This is attributed to the upgrade of the capacity during the reference period. The total utilized undersea bandwidth capacity grew by 1.5 per cent to 11,155.154 Gbps, out of which 8,201.334 Gbps were used in the country and 2,953.820 Gbps were sold outside the country, as shown in Table 13. The utilized satellite capacity increased remarkably following the launch of Starlink's high-speed, low-latency satellite Internet in the country.

Table 13: International Internet Bandwidth (Gbps)

Indicator/ Period	***Jan-Mar 24***			***Oct-Dec 23***		***Quarterly Variation (%)***
Total Available (Lit/Equip) Bandwidth Capacity (Gbps)	**20,744.338**			**17,293.743**		20.0
Undersea Bandwidth Capacity	**SEACOM**		6,350.000	**SEACOM**	3,920.000	62.0
	TEAMS		4,063.000	**TEAMS**	4,063.000	0.0
	Telkom Kenya	***EASSY***	6,290.000	***EASSY***	5,450.000	15.4
		Lion 2	707.500	***Lion 2***	820.500	-13.8
		DARE 1	1,670.000	***DARE 1***	1,386.000	20.5
		PEACE	1,661.000	***PEACE***	1,651.405	0.6
Satellite Bandwidth Capacity			2.838		2.838	0.0
Total Utilized Bandwidth Capacity (Gbps)						
Undersea Bandwidth Capacity	Sold in Kenya	Sold in other Countries		Sold in Kenya	Sold in other Countries	Quarterly Variation (%)
	8,201.334	2,953.820		8,041.632	2,953.820	1.5
Satellite Internet Capacity			48.438		0.448	10,714.29

Source: CA, Operators' Returns,

3. COURIER SERVICES

3.1 Private Operator Traffic

During the reference period, local outgoing letters and parcels grew by 29.5 percent and 23.8 percent to post 373,293 letters and 1,797,398 parcels, respectively. However, international outgoing letters declined from 405,398 letters posted in the previous quarter to 263,522 letters in the quarter the third quarter. Additionally, international incoming letters dropped by 21.8 percent to 86,227 letters during the quarter under review.

Table 14: Courier Items

Indicator/Period	*Jan-Mar 24*	*Oct-Dec 23*	*Quarterly Variation (%)*
Outgoing Domestic Letters	373,293	288,233	29.5
Outgoing Domestic Courier Items	1,797,398	1,451,307	23.8
International Outgoing Letters	263,522	405,398	-35.0
International Incoming Letters	86,227	110,328	-21.8

Source: CA, Operators' Returns,

4. BROADCASTING SERVICES

Table 15 shows licensees within Broadcast License Framework as at 31st March 2024 and the category of services offered.

Table 15: Licensees under Broadcast License Framework

Indicator/Period	*Mar 24*	*Dec-23*	*Quarterly Variation (%)*
Broadcast Signal Distributor	2	2	0.0
Self-Provisioning Broadcast Signal Distributor	3	3	0.0
Commercial Free to Air TV	351	346	1.4
Community Free to Air TV	9	9	0.0
Commercial FM radio	213	212	0.5
Community FM Radio	80	78	2.6
Subscription Broadcasting Service	18	18	0.0
Subscription Management Service	4	4	0.0
Landing Rights Authorization	5	5	0.0
Total	**685**	**677**	**1.2**

Source: CA, Operators' Returns

4.1 Subscription to Broadcasting Services

The number of subscriptions within the Broadcasting sub-sector rose by 0.1 percent to record 6.373 million from 6.367 million reported during the preceding quarter. Table 16 shows the subscriptions breakdown per category per operator.

Table 16: Broadcasting Subscriptions

Indicator/Period		***Mar 24***	***Dec- 23***	***Quarterly Variation (%)***
DTT	Go TV	2,779,227	2,746,512	1.2
	Star Times	1,686,027	1,682,600*	0.2
	Sub-Total	**4,465,254**	**4,429,112***	**0.8**
DTH	Azam	78,982	76,714	3.0
	MultiChoice (DSTV)	1,178,803	1,152,998	2.2
	Star Times	354,390	351,974*	0.7
	Wananchi (Zuku)	218,076	278,126	-21.6
	Sub-Total	**1,830,251**	**1,859,812***	**-1.6**
Cable	Cable One	2,715	2,685	1.1
	CTN (MSA)	2,064	2,060	0.2
	Wananchi (ZUKU)	72,169	69,674	3.6
	Hirani	740	3,600	-79.4
	Wadani Cable	95	95	0.0
Sub-Total		**77,783**	**78,114**	**-0.4**
Total		**6,373,288**	**6,367,038***	**0.1**

*Source: CA, Operators' Returns, *Revised data*

4.2 Average Pay TV Tariffs

Table 17: Average Pay TV Tariffs

Indicator	***Tariff (KSh.)***
Average Lowest Monthly Bouquet (KES) for DTT	274.50
Average Highest Monthly Bouquet (KES) for DTT	2,424.50
Average Lowest Monthly Bouquet (KES) for DTH	512.00
Average Highest Monthly Bouquet (KES) for DTH	3,876.50

Source: CA, Operators' Returns,

4 FREQUENCY SPECTRUM MANAGEMENT

The Authority deployed 131 microwave links during the quarter, however there were no fixed links decommissioned. In addition, the Authority assigned 2 FM sound broadcasting frequencies to sound broadcasters.

Table 18: Frequency Spectrum Management

Indicator/Period	***Jan-Mar 24***	***Oct-Dec 23***	***Quarterly Variation (%)***
Microwave links Deployed	131	120	9.2
Fixed Links Decommissioned	0	33	-100.0
FM Sound Broadcasting Frequencies Assigned	2	3	-33.3

Source: CA, Operators' Returns,

5 ELECTRONIC TRANSACTIONS AND CYBER SPACE MANAGEMENT

6.1 Registered Domain Names

As shown in Table 19 .CO.KE sub-domain recorded the highest market share of users at 84.8 percent as the end of the third quarter.

Table 19: KE Domains

SUB-DOMAIN	USER	Mar-24	
		Number of Users	% Share
TOTAL		**108,338**	**100.00**
CO.KE	Companies	91,818	84.8
ME.KE	Personal Websites and E-mail	5,962	5.5
.KE	Second level	5,513	5.1
OR.KE	Non-Profit-Making Organizations	1,973	1.8
AC.KE	Institutions of Higher Education	1,134	1.0
SC.KE	Lower and Middle-Level Institutions	913	0.8
GO.KE	Government Institutions	752	0.7
INFO.KE	Information	204	0.2
NE.KE	Personal Websites and E-mail	43	0.0
MOBI.KE	Mobile Content	26	0.0

Source: Kenic.

6.2 National Cyber Space Landscape

The trends in cyber threats detected and cyber threat advisories are as shown in Table 20.

Table 20: National Cyber Space Landscape

Indicator/Period	Threats and Advisories	Jan-Mar 24	Oct-Dec 23	Quarterly Variation (%)
Threats	Malware	33,187,524	13,221,698	151.0
	Brute Force Attacks	28,011,638	9,670,849	189.7
	Web Application Attacks	199,435	72,536	174.9
	System Vulnerabilities	871,223,680	1,269,267,620	-31.4
	Mobile Application Attacks	171,232	52,705	224.9
	Distributed Denial of Service Attacks (DDOS)	38,646,836	-	-
	Total Cyber Threats	**971,440,345**	**1,292,285,408**	**-24.8**
Advisories	Malware	1,182,484	781,561	51.3
	Brute Force Attacks	825,787	1,573,384	-47.5
	Web Application Attacks	2,681,912	2,041,236	31.4
	System Attacks	3,809,705	3,511,238	8.5
	Mobile Application attacks	9,056	34,425	-73.7
	Distributed Denial of Service Attacks (DDOS)	15,188	118,940	-87.2
	Digital Investigations	216	270	-20.0

	Digital Forensics	59	213	-72.3
	Total Cyber Advisories	**8,524,407**	**8,061,267**	**5.7**

Source: National KE-CIRT/CC, Distributed Denial of Servicen(DDOS) attacks were separated from Brute Force attacks during the quarter

7 CONCLUSION

During the referenced period, consumers of mobile voice services in the country benefited from various promotions and special offers run by the operators resulting to an increase in mobile voice traffic. Similarly, there was growth in mobile money following the removal of withdrawal codes for transactions sent from M-Pesa to Airtel Money making it possible to transfer funds directly between the two mobile wallets. The launch of Starlink's Internet services in the country played a major role in driving the uptake of broadband services. Generally, the sector is expected to keep growing following the roll out of new technologies and services.