FIRST QUARTER SECTOR STATISTICS REPORT FOR THE FINANCIAL YEAR 2024/2025 (JULY 1ST –SEPTEMBER 30TH, 2024)

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***Disclaimer*:**
Although every effort has been made to ensure the accuracy of the data contained in this report, the Authority is not liable for inaccuracies in any of the information contained in this report, which is contingent upon the operators'/service providers' compliance returns.

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LIST OF ACRONYMS

2G	Second Generation
3G	Third Generation
4G	Fourth Generation
5G	Fifth Generation
ASPs	Application Service Providers
CA	Communications Authority of Kenya
Dare 1	Djibouti Africa Regional Express 1
DDOS	Distributed Denial of Service
DoS	Denial-of-Service
DSL	Digital Subscriber Line
DTH	Direct-To-Home
DTT	Digital Terrestrial Television
EAC	East African Community
EASSy	Eastern Africa Submarine Cable Systems
FM	Frequency Modulation
FTTH	Fibre-To-The-Home
FTTO	Fibre-To-The-Office
FY	Financial Year
GB	Gigabyte
Gbps	Gigabits per second
ICTs	Information and Communication Technologies
JTL	Jamii Telecommunications Limited
Kbps	Kilobits per second
KE-CIRT/CC	National Kenya Computer Incident Response Team/Coordination Centre
LION 2	Lower Indian Ocean Network 2
LTE	Long Term Evolution
MB	Megabytes
Mbps	Megabits per second
MNOs	Mobile Network Operators
MoU	Minutes of Use
MVNO	Mobile Virtual Network Operator
NCC	National Cybersecurity Centre
OTT	Over-The-Top media services
PCK	Postal Corporation of Kenya
PEACE	Pakistan and East Africa Connecting Europe
PLC	Public Limited Company
SEACOM	Sea Sub-Marine Communications Limited
SIM	Subscriber Identification Module

SMS	Short Messaging Service
TEAMS	The East African Marine System
TKL	Telkom Kenya Limited
UMTS	Universal Mobile Telecommunication System
VoIP	Voice over Internet Protocol

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 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. CA has domesticated the same and the manual containing definitions, methodologies and scope of the various indicators is available on https://www.ca.go.ke/sites/default/files/2023-06/ICT%20Indicators%20Manual%202019.pdf

The main objective of the report is to measure and monitor availability and accessibility of ICT services by Kenyans from the perspective of supply. It is key to note that this report **does not include demand side data** (data collected from consumers of ICT services) 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.
The Authority in collaboration with KNBS have released the findings of the latest ICT Survey available on https://www.ca.go.ke/reports-and-studies.

SUMMARY OF ICT INDICATORS

This First Quarter Sector Statistics Report for the 2024/2025 Financial Year provides the performance and trends in supply and uptake of ICT services for the period July 1st to September 30th, 2024, in the following categories:

1. Mobile Network Services
2. Fixed Network Services
3. Postal & Courier Services
4. Broadcasting Services
5. Frequency Spectrum Management
6. Electronic Transactions and Cyberspace Management

Indicator/Period	*Jul-Sep 24*	*Apr-Jun 24**	*Quarterly Variation (%)*
MOBILE NETWORK SERVICES			
Subscriptions to Mobile Services			
Total Mobile (SIM) Subscriptions	69,966,434	68,892,777	1.6
Machine-to-Machine (M2M) Subscriptions	1,764,574	1,743,134	1.2
Mobile Money Transfer Services			
Number of Registered Mobile Money Agents	365,432	347,699	5.1
Mobile Money Subscriptions	40,633,292	39,831,928	2.0
Mobile Data and Broadband Subscriptions			
Mobile Data Subscriptions	53,677,623	52,544,361	2.2
Mobile Broadband Subscriptions	39,872,197	38,477,030	3.6
Mobile Phone Devices			
Feature Phones	30,726,357	30,871,316	-0.5
Smartphones	37,408,622	35,214,539	6.2
Domestic Mobile Traffic			
Mobile Voice Traffic (Minutes)			
On-Net Voice Traffic	22,241,884,328	21,171,589,886	5.1
Off-Net Voice Traffic	3,968,525,557	3,686,193,633	7.8
Mobile to Fixed Network	16,640,295	16,164,772	1.8
Mobile SMS Traffic			
SMS On-Net	12,007,468,236	11,980,521,714	0.2
SMS Off-Net	1,654,262,745	1,531,678,871	8.1
International Mobile Traffic			
Mobile Voice Traffic (Minutes)			
International Incoming Mobile Voice Traffic	134,247,370	120,055,501	11.8
International Outgoing Mobile Voice Traffic	175,261,235	175,745,404	-0.3
Mobile SMS Traffic			
International Incoming SMS	8,438,174	8,887,924	-5.1
International Outgoing SMS	2,605,963	3,104,084	-16.0
Roaming Traffic			
Out - bound Roaming Traffic			
Out-bound Roaming Incoming Voice Traffic (Minutes)	148,115,529	146,665,694	1.0
Out-bound Roaming Outgoing Voice Traffic (Minutes)	9,381,431	9,895,390	-5.2
Out-bound Roaming Incoming SMS	76,426,758	87,744,334	-12.9
Out-bound Roaming Outgoing SMS	5,358,766	5,283,909	1.4
Data Volumes (MB)	121,596,018	93,577,371	29.9
In-bound Roaming Traffic			

Indicator/Period	*Jul-Sep 24*	*Apr-Jun 24**	*Quarterly Variation (%)*
In-bound Roaming Incoming Voice Traffic (Minutes)	154,669,729	132,243,233	17.0
In-bound Roaming Outgoing Voice Traffic (Minutes)	4,899,964	4,657,154	5.2
In-bound Roaming Incoming SMS	52,987,373	47,528,580	11.5
In-bound Roaming Outgoing SMS	2,372,054	1,826,945	29.8
Data Volumes (MB)	532,097,278	332,287,756	60.1
FIXED NETWORK SERVICES			
Fixed Voice Subscriptions			
Fixed Line Subscriptions	8,289	8,289	0.0
Fixed Wireless Subscriptions	1,581	1,522	3.9
Fixed VoIP Subscriptions	34,865	60,783	-42.6
Domestic Fixed Voice Traffic			
Fixed line-Fixed line	109,613	109,613	0.0
Fixed Wireless-Fixed Wireless	264,344	259,040	2.0
Fixed to Mobile	19,946,421	19,946,421	0.0
International Fixed Voice Traffic			
Incoming Fixed Voice Traffic	5,016,838	6,000,626	-16.2
Outgoing Fixed Voice Traffic	994,563	996,035	1.3
Outgoing Fixed VOIP	538,175	544,828	0.0
Fixed Data and Broadband Services			
Fixed Data/internet subscriptions	1,574,823	1,500,940	4.9
Total Available International Bandwidth (Gbps)	24,195.320	22,154.438	9.2
Total Used International Bandwidth (Gbps)	17,411.66	15,954.74	9.1
POSTAL AND COURIER SERVICES			
Postal Traffic			
Domestic Letters	806,045	1,418,847	-43.2
International Outgoing Letters	8,593	62,392	-86.2
International Incoming Letters	426,661	55,832	664.2
Domestic Parcels	542,325	142,363	280.9
International Outgoing Parcels	4,290	137,989	-96.9
International Incoming Parcels	406,896	42,236	863.4
Courier Traffic			
Domestic Letters	962,411	415,818	131.5
International Outgoing Letters	7,053	392,931	-98.2
International Incoming Letters	6,948	102,494	-93.2
Domestic Parcels	9,116,737	1,911,237	377.0
International Outgoing Parcels	141,668	1,123,856	-87.4
International Incoming Parcels	729,834	897,276	-18.7
BROADCASTING SERVICES			
DTT Subscriptions	4,510,423	4,486,919	0.5

Indicator/Period	*Jul-Sep 24*	*Apr-Jun 24**	*Quarterly Variation (%)*
DTH Subscriptions	1,562,638	1,841,697	-15.2
Cable Subscriptions	60,894	59,576	2.2
FREQUENCY SPECTRUM MANAGEMENT			
Microwave links Deployed	2,342	582	302.4
FM Sound Broadcasting Frequencies Assigned	5	28	-82.1
ELECTRONIC TRANSACTIONS AND CYBERSPACE MANAGEMENT			
.KE Domain	106,722	106,800	-0.1
Total Cyber Threats Detected	657,843,715	1,131,696,878	-41.9
Total Cyber Threat Advisories	9,581,884	9,347,363	2.5
POPULATION			
Total Population in Kenya (Millions) †	51,525,602	51,525,602	0

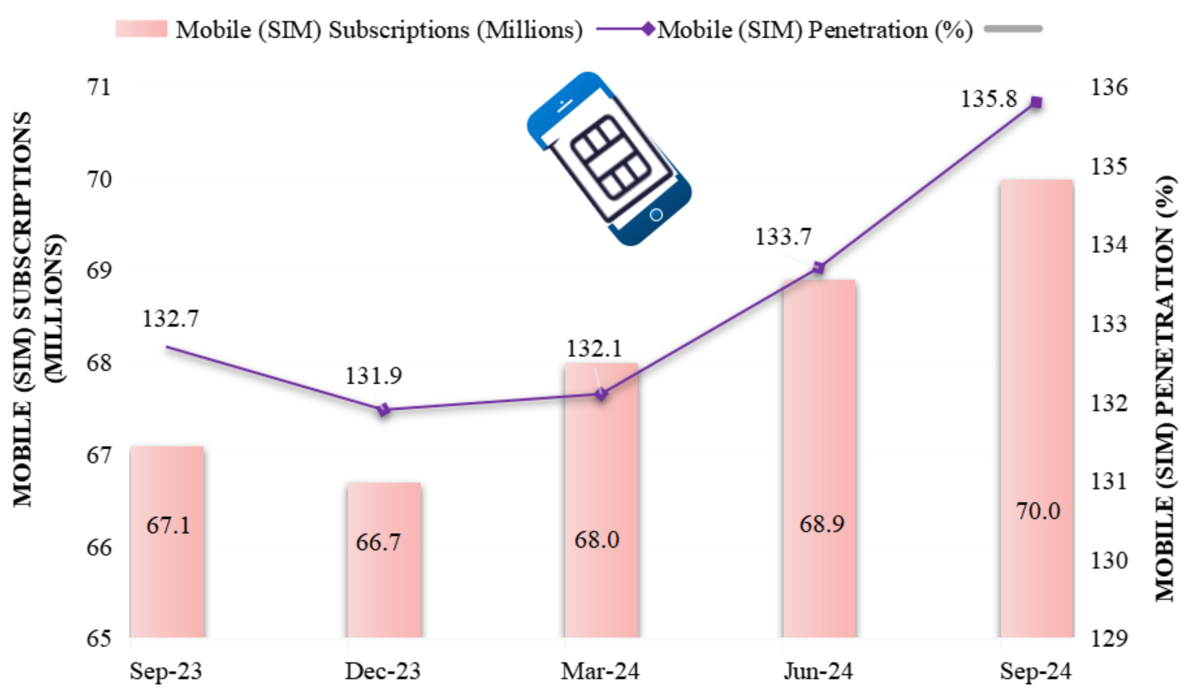
*Provisional Data for Telkom Kenya Limited (Q4 Data), *Revised Data, † Economic Survey 2024*

1. MOBILE NETWORK SERVICES

1.1 Mobile (SIM) Subscriptions

The number of active[1] mobile (SIM) subscriptions grew by 1.6 percent to 70.0 million by end of September 2024 from 68.9 million recorded last quarter representing penetration rate of 135.8 percent

Figure 1 illustrates the trends in mobile (SIM) subscriptions and penetration.

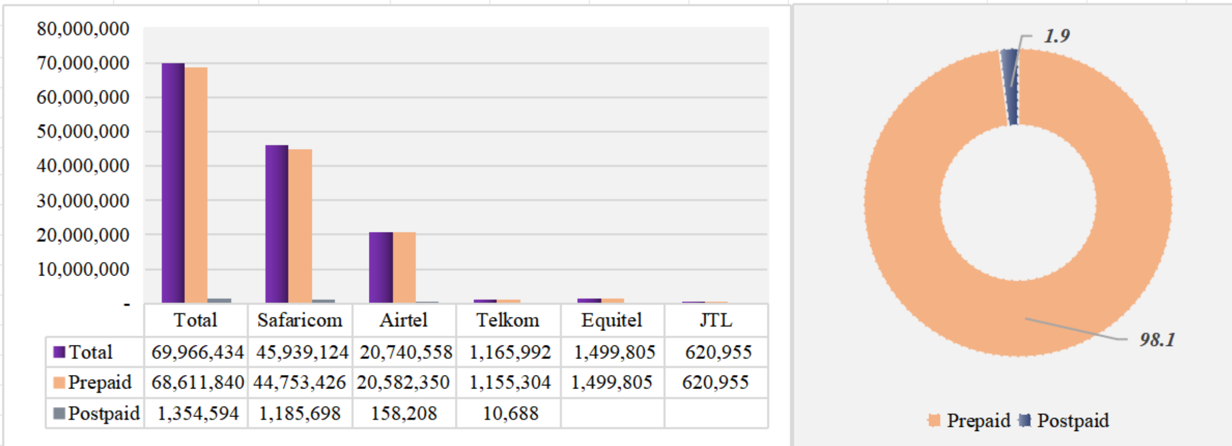


Source: CA, Operators' Returns, Provisional Data for Telkom Kenya Limited (Q4 data has been used)

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 SIM (Mobile) Subscriptions** refers to those SIM cards used at least once in the last three months and have generated revenue through making or receiving a call or carrying out a non-voice activity such as sending or receiving an SMS, accessing the Internet, Airtime top-up, transacting using mobile money and mobile banking). Activities that do not result in revenue generation such as balance enquiry, unanswered calls, and password resets, amongst other free services, do not qualify a customer account as active.



Source: CA, Operators' Returns, Provisional Data for Telkom Kenya Limited (Q4 Data)

Figure 2: Mobile SIM Subscription per Operator

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

Machine-to-Machine (M2M) subscriptions grew by 1.2 percent to a record of 1.76 million as shown in Table 1.

Table 1: Machine-to-Machine (M2M) Subscriptions

Indicator/Period	***Sep-24***	***Jun-24***	***Quarterly Variation (%)***
Machine to Machine (M2M)	1,764,574	1,743,134	1.2

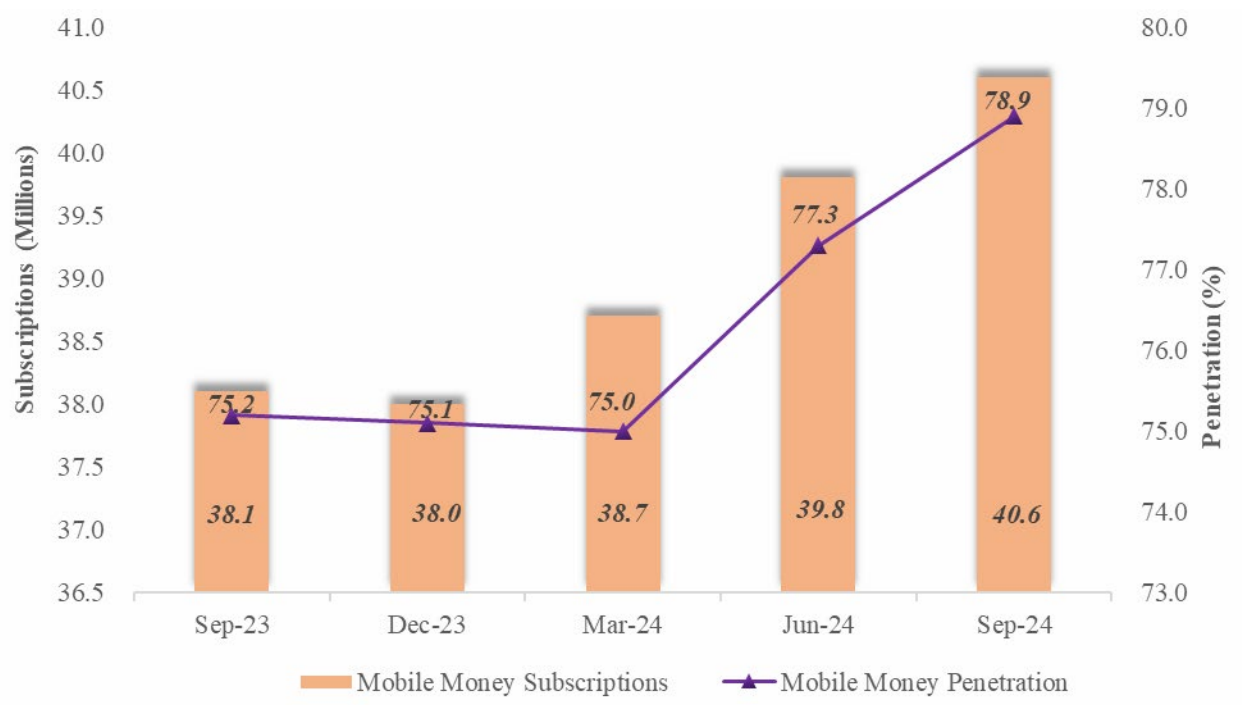
Source: CA, Operators' Returns, Provisional Data for Telkom Kenya Limited (Q4 data has been used)

1.3 Mobile Money Services

Subscriptions to mobile money services increased from 39.8 million to 40.6 million, translating to a penetration rate of 78.9 percent during the reference period.

Figure 3 illustrates the trends in mobile money subscriptions and penetration.

[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.



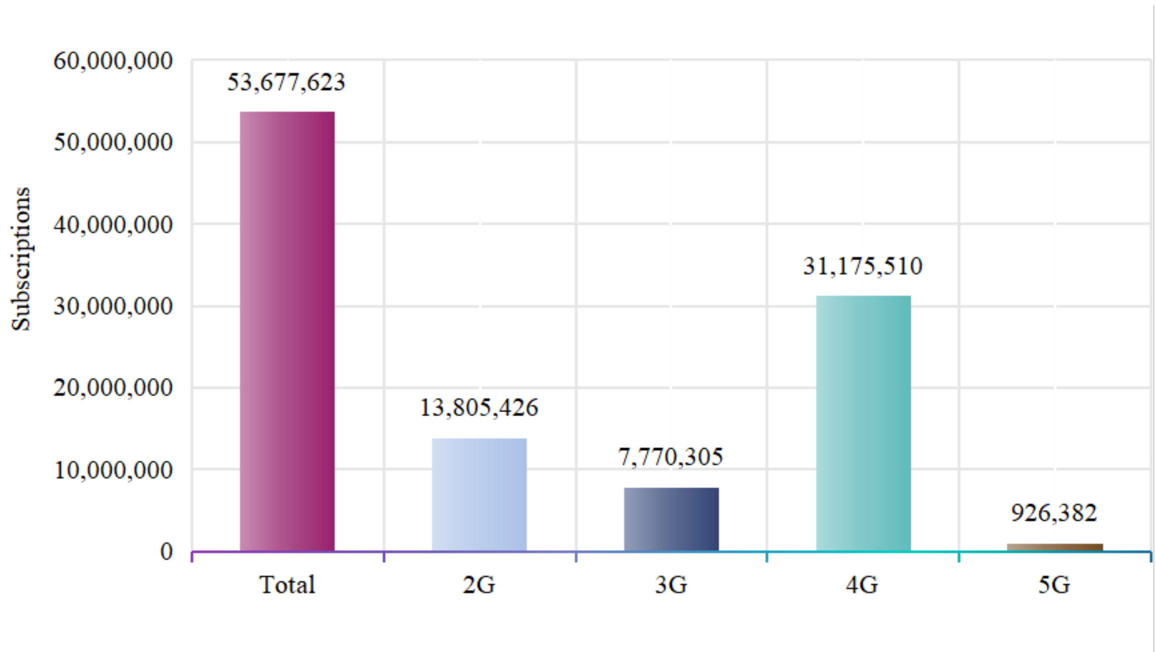
Source: CA, Operators' Returns, Provisional Data for Telkom Kenya Limited (Q4 Data)

Figure 3:Mobile Money Services

1.4 Mobile Data and Broadband[3] Services

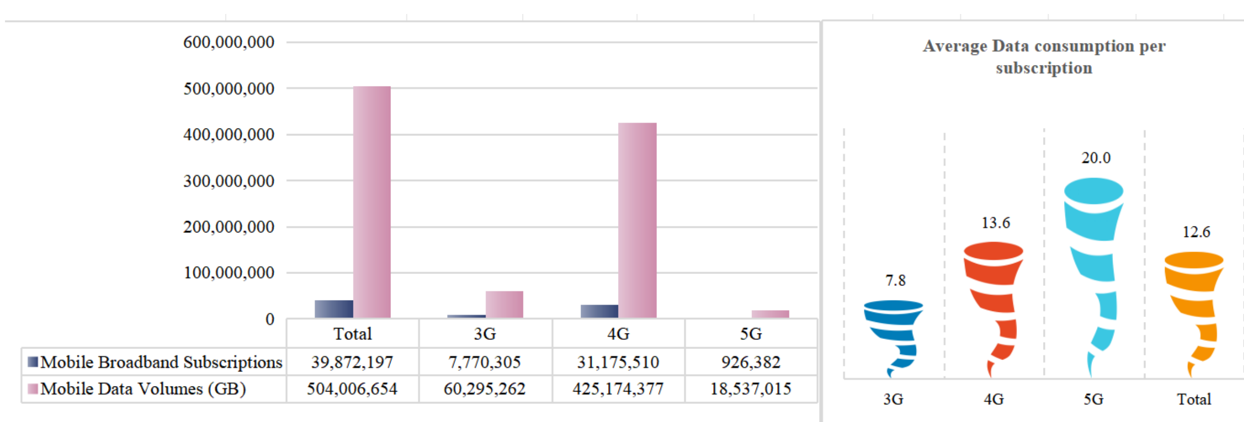
Mobile data subscriptions grew to record 53.7 million by end of the quarter, with 4G constituting of 58.1 percent, as illustrated in Figure 4. The adoption of 4G and 5G technologies has continued to grow, mainly driven by the growing demand for high-speed internet for activities such as streaming, online learning, remote work, and e-commerce.

[3] **Mobile broadband** includes 3G, 4G and 5G



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

Figure 4: Mobile Data Subscriptions

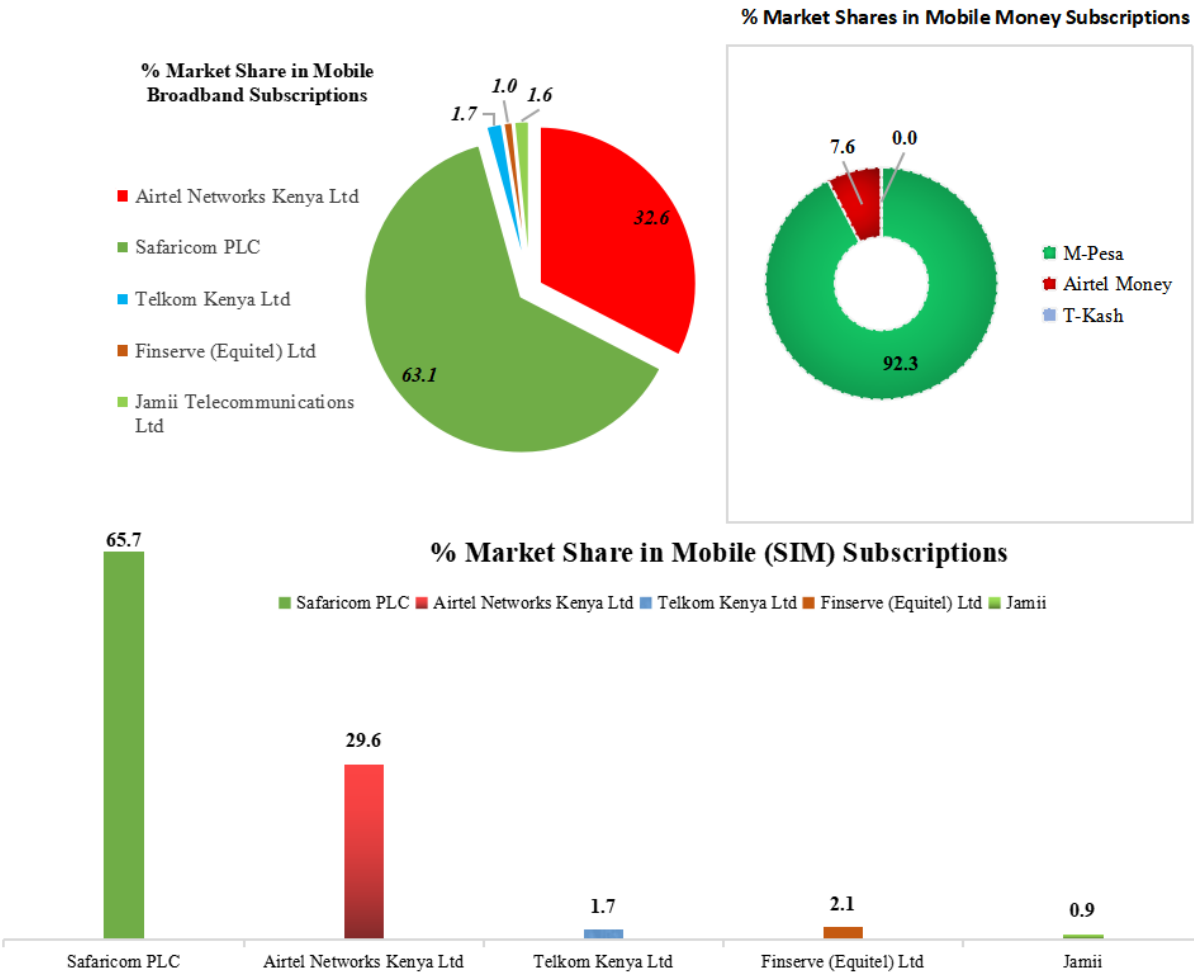


Source: CA, Operators' Returns, Provisional Data for Telkom Kenya Limited

Figure 5: Mobile Broadband Subscription and Consumption

1.5 Market Share in Mobile Service Subscriptions

The market share in subscriptions for the respective mobile services is as shown in Figure 6.



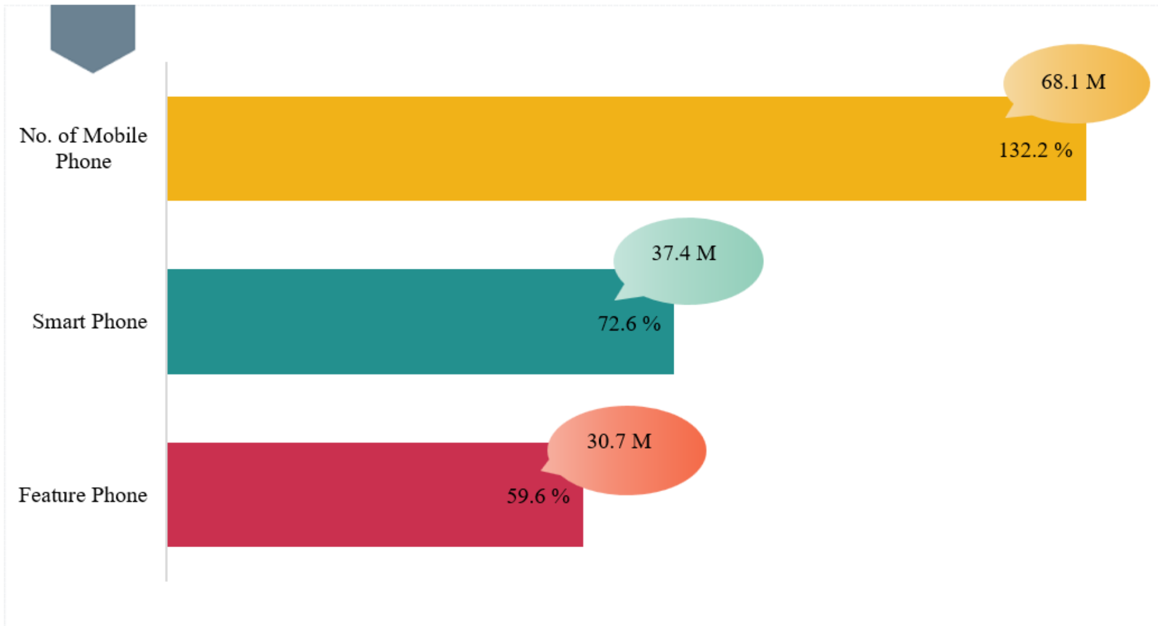
Source: CA, Operators' Returns, Provisional Data for Telkom Kenya Limited

Figure 6: Mobile Market Shares

1.6 Mobile Phone Devices [4]

The total number of mobile phone devices connected to mobile networks was 67.7 million with a penetration rate of 131.5 percent. Smart phones took the lead with a penetration of 72.6 percent as shown in figure 7. Figure 7 shows the number of smartphones and feature phones connected to mobile networks with their respective penetration rates.

[4] Mobile phones devices include all mobile phones that were connected to mobile networks as at the end of the quarter. It is subject to multiple phone ownership and therefore it should NOT be mistaken for mobile phone ownership which is measured through surveys. The Authority in collaboration with KNBS have released the findings of the latest ICT Survey available on https://www.ca.go.ke/reports-and-studies



Source: CA, Operators' Returns

Figure 7: Mobile Phone Devices

1.7 Domestic Mobile Voice and SMS Traffic

The volume of outgoing domestic voice traffic grew by 5.5 percent from 24.9 billion to 26.2 billion. This growth is attributed to the special offers and promotions run by service providers during the review period, where consumers could pay as low as KES 20 for 10 minutes of all-net calls, 20 SMS, and 50 MB of data. Similarly, domestic SMS traffic grew to 13.7 billion messages, from 13.5 billion reported last quarter.

Table 2 shows the trends in domestic voice and SMS traffic per operator.

Table 2: Domestic Mobile Traffic per Operator

Name of Operator /Indicator			***Safaricom PLC***	***Airtel Networks Kenya Ltd***	***TKL****	***Finserve***	***JTL***	***Total***
Jul-Sep 24	***Outgoing Voice***	***Total***	**16,998,408,178**	**9,074,045,982**	**108,718,702**	**21,333,369**	**7,903,654**	**26,210,409,884**
		On-net	15,644,645,393	6,537,642,805	57,975,303	1,518,829	101,998	22,241,884,328
		Off-net	1,353,762,785	2,536,403,177	50,743,399	19,814,540	7,801,656	3,968,525,557
	Outgoing SMS	***Total***	**12,154,963,255**	**1,493,559,708**	**8,509,754**	**3,725,197**	**973,067**	**13,661,730,981**
		On-net	11,315,974,112	689,830,802	307,606	1,316,523	39,193	12,007,468,236
		Off-net	838,989,143	803,728,906	8,202,148	2,408,674	933,874	1,654,262,745
Apr-Jun 24	***Outgoing Voice***	***Total***	**16,426,466,893**	**8,289,315,350**	**108,718,702**	**20,960,983**	**6,866,419**	**24,852,328,347**
		On-net	15,145,968,323	5,963,751,374	57,975,303	1,489,714	85,625	21,169,270,339
		Off-net	1,280,498,570	2,325,563,976	50,743,399	19,471,269	6,780,794	3,683,058,008

	Outgoing SMS	***Total***	**12,110,707,608**	**1,386,131,381**	**8,509,754**	**3,819,197**	**943,505**	**13,510,111,445**
		On-net	11,275,936,926	702,489,372	307,606	1,313,344	43,436	11,980,090,684
		Off-net	834,770,682	683,642,009	8,202,148	2,505,853	900,069	1,530,020,761

Source: CA, Operators' Returns, Provisional Data for Telkom Kenya Limited (Q4 Data)

1.8 Minutes of Use per Call per Operator

The total average minutes per on-net call remained unchanged at 1.8 minutes whereas off-net calls grew to 1.3 minutes from 1.2 minutes recorded last quarter. Airtel Networks Limited customers spent more time on a single on-net call averaging 2.8 minutes whereas Safaricom PLC and Jamii Telecommunications Ltd consumers spent more on off-net call, averaging at 1.4 minutes.

Table 3 shows the average minutes of use per call by the operator.

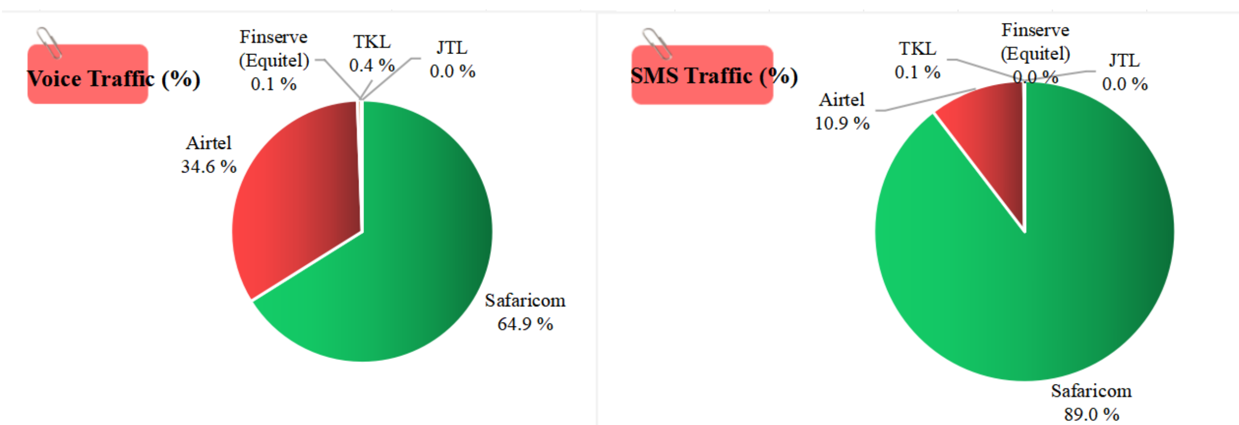
Table 3: MoU per Call

Period	***Jul-Sep 24***		***Apr-Jun 24****	
Operator/Indicator	**On-net**	**Off-net**	**On-net**	**Off-net**
Total Average	**1.8**	**1.3**	**1.8**	**1.2**
Safaricom PLC	1.6	1.4	1.6	1.4
Airtel Networks Limited	2.8	1.2	2.8	1.2
Telkom Kenya Limited	1.5	1.2	1.5	1.2
Finserve (Equitel)	2.1	1.3	2.0	1.3
Jamii Telecommunications Ltd	0.1	1.4	0.1	1.3

**Revised Data*

1.9 Market shares in Domestic Mobile Voice and SMS Traffic

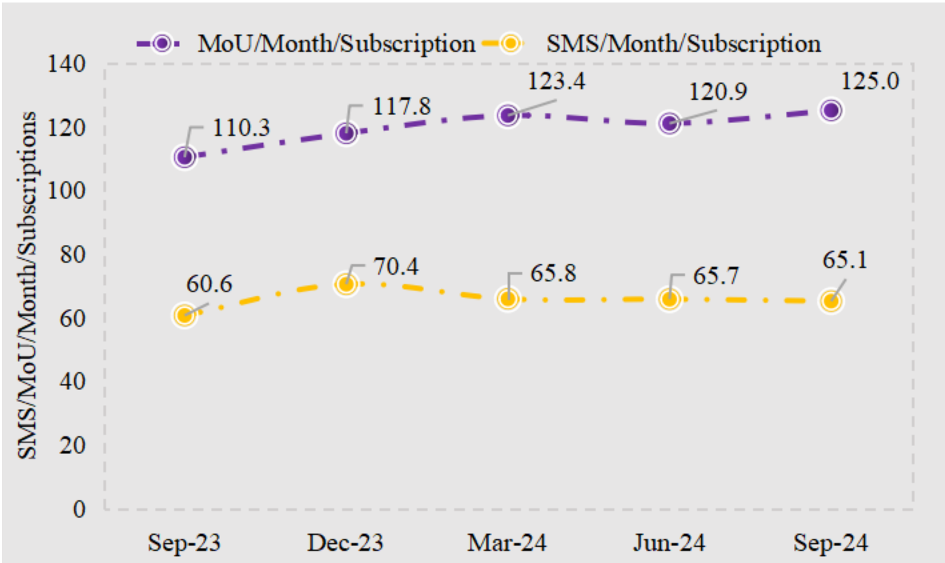
The market shares in domestic mobile voice and SMS traffic are as shown in Figure 8.



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

Figure 8: Market Shares in Domestic Mobile Voice and SMS

1.10 Minutes/Month/Subscription vs SMS/Month/Subscription



Source: CA, Operators' Returns, Provisional Data for Telkom Kenya Limited (Q4 Data)

Figure 9: MoU/Month/Subscription vs SMS/Month/Subscription

The Minutes of Use per subscriber per month grew to 125.0 minutes from 120.9 minutes whereas SMS per month per subscription declined from 65.7 to 65.1 messages.

1.11 International Mobile Traffic

Incoming international mobile voice minutes grew by 11.9 percent to 134.2 million during the reference period. On the other hand, outgoing international mobile voice traffic dropped from 175.7 million to 175.3 million. International incoming mobile SMS rose to 8.4 million whereas outgoing mobile SMS declined to post 2.6 million as shown in Table 4.

Table 4: International Mobile Traffic

Indicator/Period	*Region*	*Jul-Sep 24*	*Apr-Jun 24**	*Quarterly Variation (%)*
International Incoming Mobile Voice Minutes	*EAC*	104,315,553	90,287,938	15.5
	Others	29,931,817	29,767,563	0.6
	Total	**134,247,370**	**120,055,501**	11.8
International Outgoing Mobile Voice Minutes	*EAC*	116,182,986	118,125,244	-1.6
	Others	59,078,249	57,620,160	2.5
	Total	**175,261,235**	**175,745,404**	-0.3
International Incoming Mobile SMS		8,438,174	8,887,924	-5.1
International Outgoing Mobile SMS		2,605,963	3,104,084	-16.0

*Source: CA, Operators' Returns, *Revised Data, Provisional Data for Telkom Kenya Limited (Q4 Data)*

1.12 Roaming Traffic

Tables 5 and 6 show the trends in outbound and inbound roaming traffic during the quarter under reference.

Table 5: Outbound Roaming Traffic

Country / Indicator	***Incoming Voice (Minutes)***	***Incoming SMS***	***Outgoing Voice (Minutes)***	***Outgoing SMS***	***Data Volumes (MB)***
Uganda	123,447,510	3,742,499	4,458	1,365,446	47,206,272
Tanzania	14,706,292	1,143,984	15,193,747	713,446	13,665,478
Rwanda	3,269,799	405,088	10	117,410	3,424,113
Burundi	29,079	1,983	1,235,784	5,683	13,545
S. Sudan	5,687,528	567,293	265,225	180,205	486,105
Democratic Republic of Congo	6,148	221,924	93,897	30,770	14,885,542
EAC Total	**147,146,356**	**6,082,771**	**16,793,121**	**2,412,960**	**79,681,055**
Others	969,173	3,298,660	59,633,637	2,945,806	41,914,963
Total	**148,115,529**	**9,381,431**	**76,426,758**	**5,358,766**	**121,596,018**

Source: CA, Operators' Returns, Provisional Data for Telkom Kenya Limited (Q4 Data)

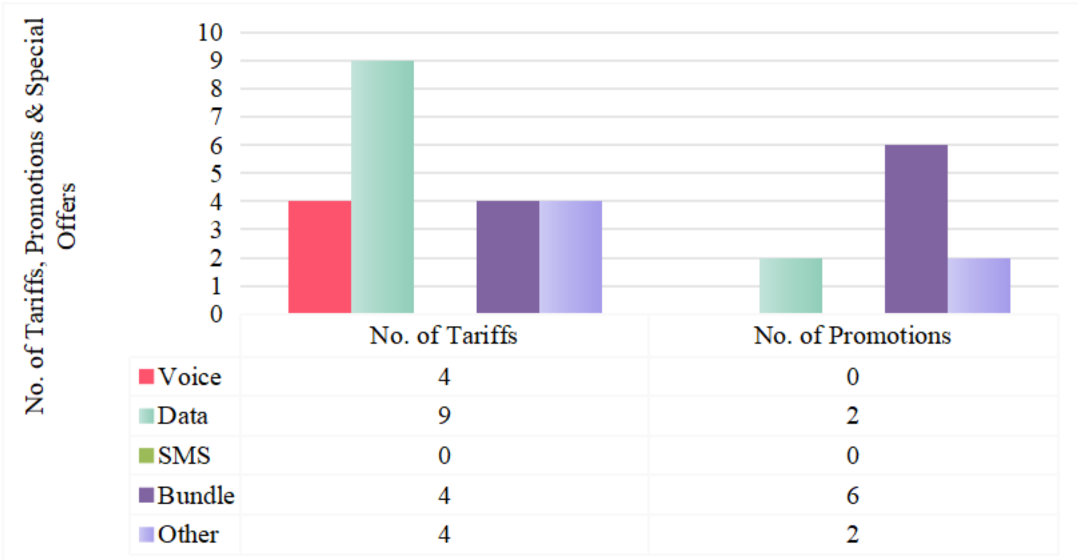
Table 6: In-bound Roaming Traffic

Country / Indicator	***Incoming Voice (Minutes)***	***Incoming SMS***	***Outgoing Voice (Minutes)***	***Outgoing SMS***	***Data Volumes (MB)***
Uganda	27,566,945	1,547,074	4,389,608	187,798	18,305,729
Tanzania	98,720,988	384,389	19,028,814	228,078	2,505,684
Rwanda	25,035,100	172,077	2,403,527	30,233	418,744
Burundi	115,304	137,660	3,501	2,903	128
S. Sudan	1,664,523	157,162	855,661	21,471	103,695
Democratic Republic of Congo	7,165	64,940	151,204	7,531	164,530
EAC Total	**153,110,025**	**2,463,302**	**26,832,315**	**478,014**	**21,498,510**
Others	1,559,704	2,436,662	26,155,058	1,894,040	510,598,768
Total	**154,669,729**	**4,899,964**	**52,987,373**	**2,372,054**	**532,097,278**

Source: CA, Operators' Returns, Provisional Data for Telkom Kenya Limited (Q4 Data)

1.13 Tariffs, Promotions and Special Offers

The number of approved applications for tariffs and promotions & special offers filed by MNOs during the review period is as shown in Figure 10.



Source: CA, filed tariffs, promotions and special offers

Figure 10: Distribution of Tariffs, Promotions and Special Offer

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

Pay-As-You-Go charges for voice, SMS, and data are as shown in Table 7.

Table 7: Average Pay-As-You-Go (PAYG) Tariffs

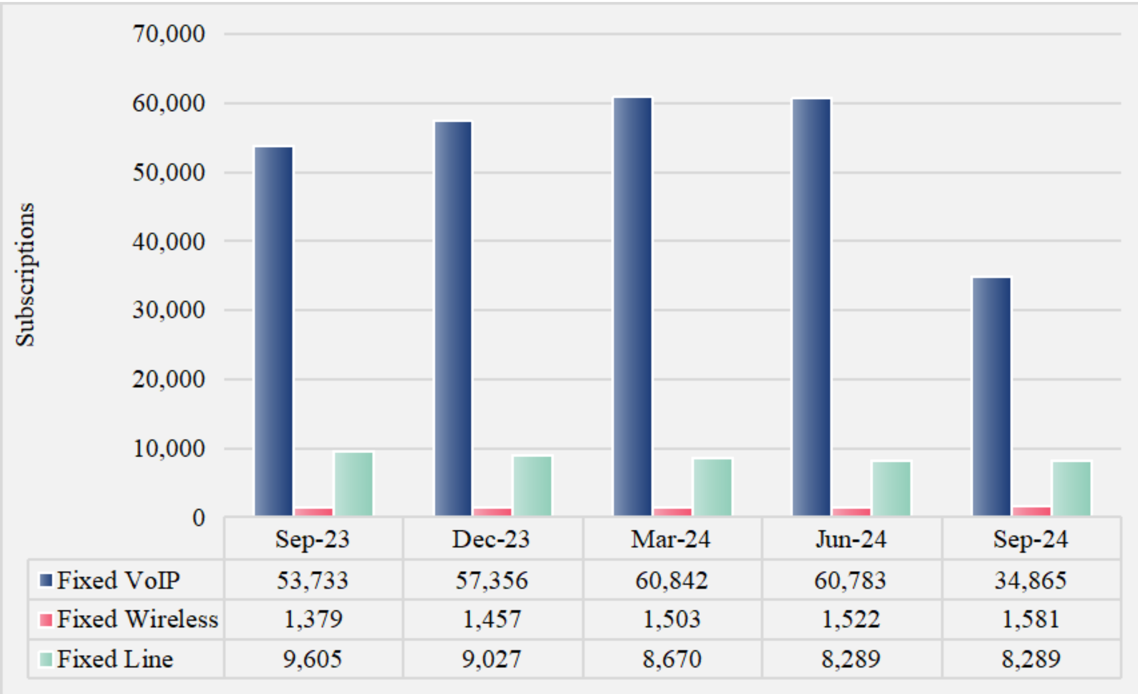
Operator/Market	*Average Voice (KES/Min)*	*SMS (KES/SMS)*	*Data (KES/MB)*
Safaricom PLC	4.87	1.20	4.87
Airtel Network Limited	2.78	1.20	4.50
	4.50	1.20	4.50
Telkom Kenya Limited	3.54	1.15	4.50
Average	**3.92**	**1.19**	**4.59**

Source: CA

2. FIXED NETWORK SERVICES

2.1 Fixed Telephone Subscriptions

Figure 14 shows the trends in fixed telephone subscriptions at the end of the first quarter FY 2024/25. VoIP subscriptions declined by 42.6 percent during the reference period due to subscriber churn.



Source: CA, Operators' Returns, Provisional Data for Telkom Kenya Limited (Q4 Data)

Figure 11: Fixed Voice Subscriptions

2.2 Domestic Fixed Voice Traffic

Table 9 shows the trends in local fixed voice network traffic.

Table 8: Domestic Fixed Voice Traffic (Minutes)

Domestic Fixed Voice Traffic (Minutes)	***Jul-Sep 24***	***Apr-Jun 24***	***Quarterly Variation (%)***
Fixed-Fixed*	109,613	109,613	0.0
Fixed Wireless-Fixed Wireless	264,344	259,040	2.0
Fixed to Mobile*	19,946,421	19,946,421	0.0
Total Domestic Fixed Network Traffic	**20,320,378**	**20,315,074**	**0.0**

*Source: CA, Operators' Returns, *Provisional Data for Telkom Kenya Limited (Q4 Data)*

2.3 International Fixed Voice Traffic

The volume of international fixed voice traffic registered a downward trend as shown in Table 10.

Table 9: International Fixed Voice Traffic

Indicator/Period	*Jul-Sep 24*	*Apr-Jun 24**	*Quarterly Variation (%)*
International Incoming Fixed Network Voice traffic	5,016,838	5,986,534.00	-16.2
International Outgoing Fixed Network Voice traffic	994,563	981,558.00	1.3
International Outgoing Fixed VoIP traffic	538,175	538,059.13	0.0

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

2.4 Fixed Internet Subscriptions by Technology

As shown in Table 10, the total data/internet subscriptions rose by 4.9 to 1.57 million from 1.50 million recorded as of June 30th, 2024. Satellite internet subscriptions recorded a significant increase of 104.7 percent during the reference period attributed to a customer acquisition campaign run by Starlink Internet Services Kenya that introduced an option to rent satellite equipment at a reduced cost.

Table 10: Fixed Internet Subscriptions by Technology

Indicator/Period	*Sep 24*	*Jun 24*	*Quarterly Variation (%)*
Total Wireless Subscriptions	**379,144**	**365,045**	**3.9**
Terrestrial Wireless Data Subscribers	362,102	356,721	1.5
Satellite Data Subscribers	17,042	8,324	104.7
Total Fixed (Wired) Subscriptions	**1,195,679**	**1,135,895**	**5.3**
Fixed DSL Data Subscribers (Copper)	137	137	0.0
Fixed Fibre Optic Data Subscribers	994,444	939,553	5.8
Fixed Cable Modem Subscribers	200,212	195,319	2.5
Other Fixed Data Subscribers (e.g. Radio)	886	886	0.0
Total Subscriptions	**1,574,823**	**1,500,940**	**4.9**

Source: CA, Operators' Returns, Provisional data for Poa Internet Kenya Ltd, Telkom Kenya Ltd (Q4 Data) and Wananchi Telecom Ltd.

2.5 Fixed Data and Broadband Subscriptions

As at the end of the review period, majority of customers subscribed to data/internet speeds between 2 Mbps and 10 Mbps. Table 11 shows the breakdown of fixed data/Internet subscriptions by speed and technology.

Table 11: Fixed Data and Broadband Subscriptions

Internet Technology/Speeds	*<256K bps*	*=>256K bps < 2Mbps*	*=>2<10 Mbps*	*=>10<30 Mbps*	*=>30<100 Mbps*	*=>100 Mbps <1Gbps*	*=>1Gbps*	*Totals*
Cable Modem	0	0	31,782	160,897	7,325	208	0	**200,212**
Copper (DSL)	4	7	126	0	0	0	0	**137**
FTTH	0	3,552	351,423	305,656	235,415	5,401	0	**901,447**

FTTO	0	4,501	15,796	38,377	31,762	2,271	290	**92,997**
Fixed Wireless	15,781	7,834	311,668	19,845	6,071	903	0	**362,102**
Satellite	3	119	7	119	0	16,791	3	**17,042**
Other Fixed	0	78	478	235	95	0	0	**886**
Totals	**15,788**	**16,091**	**711,280**	**525,129**	**280,668**	**25,574**	**293**	**1,574,823**

Source: CA, Operators' Returns, Provisional data for Poa Internet Kenya Ltd, Telkom Kenya Ltd (Q4 Data) and Wananchi Telecom Ltd.

2.6 Fixed Data Subscriptions by Operator

Safaricom PLC recorded the highest market share in fixed data subscriptions, followed by Jamii Telecommunications Ltd, Wananchi Group (Kenya) Ltd, and Poa Internet Kenya Ltd, with market shares of 36.6, 24.4, 16.8 and 12.6 percent, respectively.
Table 12 shows fixed data subscriptions and percentage market shares.

Table 12: Fixed Data Subscriptions by Operator

Service Provider/Indicator	***Number of data subscriptions***	***Percentage Market share (%)***
Safaricom PLC	575,835	36.6
Jamii Telecommunications Ltd	384,616	24.4
Wananchi Group (Kenya) Ltd*	265,194	16.8
Poa Internet Kenya Ltd	198,609	12.6
Mawingu Networks Ltd	44,311	2.8
Vilcom Network Limited	27,734	1.8
Dimension Data Solutions East Africa Ltd	17,844	1.1
Starlink Internet Services Kenya	16,786	1.1
Liquid Telecommunications Kenya	15,851	1.0
Vijiji Connect Ltd	9,816	0.6
Other Fixed Service Providers	18,227	1.2

*Source: CA, Operators' Returns, * Includes Wananchi Group Ltd, Simbanet, and Wananchi Telecom Ltd (Q4 Data), Provisional data for Poa Internet Kenya Ltd, Telkom Kenya Ltd (Q4 Data) and Wananchi Telecom Ltd.*

2.7 International Bandwidth

The total available/lit international internet bandwidth capacity in the country increased from 22,154.438 Gbps recorded last quarter to 24,195.320 Gbps. Further, utilized undersea bandwidth rose by 1.1 percent to15,287.222 Gbps out of which 12,333.402 Gbps was used in the country and 2,953.820 Gbps transited to other countries. Utilized satellite internet capacity grew significantly by 152.8 percent to reach 2,124.438 Gbps as shown in Table 14. This growth corresponds to the growth in satellite subscriptions following some customer acquisition initiatives by Starlink Internet Services Kenya.

Table 13: International Internet Bandwidth (Gbps)

Indicator/ Period	*Jul-Sep 24*			*Apr-Jun 24**		*Quarterly Variation (%)*
Total Available (Lit/Equip) Bandwidth Capacity (Gbps)			**24,195.320**		**22,154.438**	**9.2**
Undersea Bandwidth Capacity	**SEACOM**		6,850.000	**SEACOM**	6,850.000	0.0
	TEAMS		4,063.000	**TEAMS**	4,063.000	0.0
	Telkom Kenya	***EASSY***	6,420.000	***EASSY***	6,420.000	0.0
		Lion 2	810.000	***Lion 2***	810.000	0.0
		DARE 1	1,780.000	***DARE 1***	1,780.000	0.0
		PEACE	2,231.000	***PEACE***	2,231.000	0.0
Satellite Bandwidth Capacity			0.438		2.838	-84.6
Total Utilized Bandwidth Capacity (Gbps)						
Undersea Bandwidth Capacity	***Sold In Kenya***	***Sold in other Countries***		***Sold In Kenya***	***Sold in other Countries***	
	12,333.402		2,953.820	12,160.474	2,953.820	1.1
Satellite Internet Capacity			2,124.438		840.448	152.8

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

3. POSTAL AND COURIER SERVICES

3.1 Postal Traffic

Domestic and international outgoing letters handled during the quarter under review declined by 43.2 and 86.2 percent, respectively, compared to the previous quarter. In contrast, International Incoming Letters increased from 55,832 items in the previous quarter to 426,661 items in the quarter under reference as shown in Table 14.

Table 14 : Postal Items

Indicator/Period		*Jul-Sep 24*	*Apr-Jun 24*	*Quarterly Variation (%)*
Letters	Domestic	806,045	1,418,847	-43.2
	International Outgoing	8,593	62,392	-86.2
	International Incoming	426,661	55,832	664.2
Parcels	Domestic	542,325	142,363	280.9
	International Outgoing	4,290	137,989	-96.9

	International Incoming	406,896	42,236	863.4

Source: CA, Operators' Returns

3.2 Courier Traffic

Domestic letters and parcels registered 0.96 and 9.12 million items, respectively, during the reference period. Table 16 shows the courier items for both domestic and international deliveries.

Table 15: Courier Items

Indicator/Period		***Jul-Sep 24***	***Apr-Jun 24***	***Quarterly Variation (%)***
Letters	Domestic	962,411	415,818	131.5
	International Outgoing	7,053	392,931	-98.2
	International Incoming	6,948	102,494	-93.2
Parcels	Domestic	9,116,737	1,911,237	377.0
	International Outgoing	141,668	1,123,856	-87.4
	International Incoming	729,834	897,276	-18.7

Source: CA, Operators' Returns

4. BROADCASTING SERVICES

4.1 Subscription to Broadcasting Services

The total number of subscriptions for broadcasting services dropped by 4.0 percent to 6.13 million by the end of the reference period due to subscriber churn.

Table 16: Broadcasting Subscriptions

Indicator/Period		***Sep-24***	***Jun-24***	***Quarterly Variation (%)***
DTT	Go TV	2,806,516	2,793,579	0.5
	Star Times	1,703,907	1,693,340	0.6
	Sub-Total	**4,510,423**	**4,486,919**	**0.5**
DTH	Azam	26,723	81,553	-67.2
	MultiChoice (DSTV)	1,211,305	1,195,775	1.3
	Star Times	184,827	361,953	-48.9
	Wananchi (Zuku)	139,783	202,416	-30.9
	Sub-Total	**1,562,638**	**1,841,697**	**-15.2**
Cable	Cable One	1,444	2,758	-47.6
	CTN (MSA)	2,082	2,067	0.7
	Wananchi (ZUKU)	56,515	53,898	4.9
	Hirani	758	758	0.0
	Wadani Cable	95	95	0.0
	Sub-Total	**60,894**	**59,576**	**2.2**
Total		**6,133,955**	**6,388,192**	**-4.0**

Source: CA, Operators' Returns

5. FREQUENCY SPECTRUM MANAGEMENT

The number of microwave links assigned by the Authority to various operators for deployment increased from 582 to 2,342, while FM sound broadcasting frequencies assigned declined from 28 to 5 during the quarter under review.

Table 17: Frequency Spectrum Management

Indicator/Period	*Jul-Sep 24*	*Apr-Jun 24*	*Quarterly Variation (%)*
Assigned Microwave Links for Deployment	2,342	582	302.4
FM Sound Broadcasting Frequencies Assigned	5	28	-82.1

Source: CA,

6. ELECTRONIC TRANSACTIONS AND CYBER SPACE MANAGEMENT

6.1 Registered Domain Names

The total number of users registered to .KE domain dropped by 0.1 percent to 106,722.
Table 19 shows the various .KE sub-domains and their respective number of users as at the end of September 30th, 2024.

Table 18: .KE Domains

SUB-DOMAIN	*USER*	*Number of Users*		
		Sep-24	*Jun-24*	*Quarterly Variation (%)*
Total		**106,722**	**106,800**	**-0.1**
CO.KE	Companies	91,095	90,165	1.0
.KE	Second level	5,870	5,806	1.1
ME.KE	Personal Websites and E-mail	4,590	5,721	-19.8
OR.KE	Non-Profit-Making Organizations	1,998	1,979	1.0
AC.KE	Institutions of Higher Education	1,196	1,162	2.9
SC.KE	Lower and Middle-Level Institutions	910	918	-0.9
GO.KE	Government Institutions	790	770	2.6
INFO.KE	Information	197	206	-4.4
NE.KE	Personal Websites and E-mail	48	46	4.3
MOBI.KE	Mobile Content	28	27	3.7

Source: Kenic.

6.2 National Cyber Space Landscape

During the quarter, total cyber threat events detected by the National KE-CIRT/CC stood at 657.8 million. In response to these threats, the National KE-CIRT/CC issued 9.6 million advisories as shown in Table 20.

Table 19: Cybersecurity Landscape

Indicator/Period	*Threats and Advisories*	*Jul-Sep 24*	*Apr-Jun 24*	*Quarterly Variation (%)*
Threats	Malware	33,894,268	31,936,666	6.1
	Brute Force Attacks	38,135,186	26,854,341	42.0
	Web Application Attacks	174,251	146,903	18.6
	System Vulnerabilities	583,696,090	1,065,325,993	-45.2
	Mobile Application Attacks	117,661	99,294	18.5
	DDOS	1,826,259	7,333,681	-75.1
	Total Cyber Threats	**657,843,715**	**1,131,696,878**	**-41.9**
Advisories	Malware	285,133	643,142	-55.7
	Brute Force Attacks	1,058,919	950,346	11.4
	Web Application Attacks	3,384,137	3,041,312	11.3
	System Attacks	4,631,429	4,694,754	-1.3
	Mobile Application Attacks	6,599	6,237	5.8
	DDOS	215,667	11,572	1763.7
	Total Cyber Advisories	**9,581,884**	**9,347,363**	**2.5**

Source: National KE-CIRT/CC

7. CONCLUSION

The telecommunications sector demonstrated overall growth during the quarter under review. Mobile SIM, machine-to-machine (M2M), mobile money and broadband subscriptions all grew, reflecting the sector's continued expansion and adaptation to consumer demands. While 3G broadband subscriptions and data consumption declined, the adoption of 4G and 5G technologies increased, highlighting a shift towards higher-speed networks. The country is poised for significant advancements in both 4G and 5G uptake which is driven by the continued investments and increased consumer demand for high-speed connectivity.