SECOND QUARTER SECTOR STATISTICS REPORT FOR THE FINANCIAL YEAR 2024/2025 (OCTOBER 1ST –DECEMBER 31ST, 2024)

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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 Second 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 October 1st to December 31st, 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	*Oct-Dec 24*	*Jul-Sep 24*	*Quarterly Variation (%)*
MOBILE NETWORK SERVICES			
Subscriptions to Mobile Services			
Total Mobile (SIM) Subscriptions	71,375,093	69,966,434	2.0
Machine-to-Machine (M2M) Subscriptions	1,915,997	1,764,574	8.6
Mobile Money Transfer Services			
Number of Registered Mobile Money Agents	395,366	365,432	8.2
Mobile Money Subscriptions	42,302,833	40,633,292	4.1
Mobile Data and Broadband Subscriptions			
Mobile Data Subscriptions	56,104,736	53,677,623	4.5
Mobile Broadband Subscriptions	44,768,694	39,872,197	12.3
Mobile Phone Devices			
Feature Phones	30,579,714	30,726,357	-0.5
Smartphones	41,477,527	37,408,622	10.9
Domestic Mobile Traffic			
Mobile Voice Traffic (Minutes)			
On-Net Voice Traffic	23,123,066,268	22,241,884,328	4.0
Off-Net Voice Traffic	4,296,590,445	3,968,525,557	8.3
Mobile to Fixed Network	16,773,826	16,640,295	0.8
Mobile SMS Traffic			
SMS On-Net	12,314,953,178	12,007,468,236	2.6
SMS Off-Net	1,798,154,220	1,654,262,745	8.7
International Mobile Traffic			
Mobile Voice Traffic (Minutes)			
International Incoming Mobile Voice Traffic	142,476,522	134,247,370	6.1
International Outgoing Mobile Voice Traffic	177,319,538	175,261,235	1.2
Mobile SMS Traffic			
International Incoming SMS	7,321,545	8,438,174	-13.2
International Outgoing SMS	4,442,686	2,605,963	70.5
Roaming Traffic			
Out - bound Roaming Traffic			
Out-bound Roaming Incoming Voice Traffic (Minutes)	149,817,912	148,115,529	1.1
Out-bound Roaming Outgoing Voice Traffic (Minutes)	8,597,279	9,381,431	-8.4
Out-bound Roaming Incoming SMS	82,500,854	76,426,758	7.9
Out-bound Roaming Outgoing SMS	5,490,085	5,358,766	2.5
Data Volumes (MB)	133,243,567	121,596,018	9.6

In-bound Roaming Traffic			
In-bound Roaming Incoming Voice Traffic (Minutes)	168,934,007	154,669,729	9.2
In-bound Roaming Outgoing Voice Traffic (Minutes)	4,995,398	4,899,964	1.9
In-bound Roaming Incoming SMS	55,210,620	52,987,373	4.2
In-bound Roaming Outgoing SMS	2,225,408	2,372,054	-6.2
Data Volumes (MB)	510,882,168	532,097,278	-4.0
FIXED NETWORK SERVICES			
Fixed Voice Subscriptions			
Fixed Line Subscriptions	8,289	8,289	0.0
Fixed Wireless Subscriptions	1,552	1,581	-1.8
Fixed VoIP Subscriptions	47,176	34,865	35.3
Domestic Fixed Voice Traffic			
Fixed line-Fixed line	109,613	109,613	0.0
Fixed Wireless-Fixed Wireless	283,264	264,344	7.2
Fixed - Mobile	19,946,421	19,946,421	0.0
International Fixed Voice Traffic			
Incoming Fixed Voice Traffic	4,868,590	5,016,838	-3.0
Outgoing Fixed Voice Traffic	1,000,530	994,563	0.6
Outgoing Fixed VOIP	504,565	538,175	-6.2
Fixed Data and Broadband Services			
Fixed Data/internet subscriptions	1,718,679	1,574,823	9.1
Total Available International Bandwidth (Gbps)	22,154.438	22,154.438	0.0
Total Used International Bandwidth (Gbps)	34,141,040.438	19,516,150.438*	74.9
POSTAL AND COURIER SERVICES			
Postal Traffic			
Domestic Letters	815,075	806,045	1.1
International Outgoing Letters	6,708	8,593	-21.9
International Incoming Letters	500,263	426,661	17.3
Domestic Parcels	641,262	542,325	18.2
International Outgoing Parcels	19,369	4,290	351.5
International Incoming Parcels	324,671	406,896	-20.2
Courier Traffic			
Domestic Letters	816,344	962,411	-15.2
International Outgoing Letters	15,502	7,053	119.8
International Incoming Letters	35,088	6,948	405.0
Domestic Parcels	3,706,664	3,712,537*	-0.2
International Outgoing Parcels	22,927	141,668	-83.8
International Incoming Parcels	206,369	729,834	-71.7
BROADCASTING SERVICES			
DTT Subscriptions	4,534,925	4,510,423	0.5
DTH Subscriptions	1,594,237	1,562,638	2.0

Cable Subscriptions	63,549	60,894	4.4
FREQUENCY SPECTRUM MANAGEMENT			
Microwave links Deployed	11,249	10,924*	3.0
FM Sound Broadcasting Frequencies Assigned	1,055	1,047*	0.8
ELECTRONIC TRANSACTIONS AND CYBERSPACE MANAGEMENT			
.KE Domain	108,154	106,722	1.3
Total Cyber Threats Detected	840,921,998	661,190,115	27.2
Total Cyber Threat Advisories	11,584,581	9,581,884	20.9
POPULATION			
Total Population in Kenya (Millions)	51,525,602	51,525,602	0.0

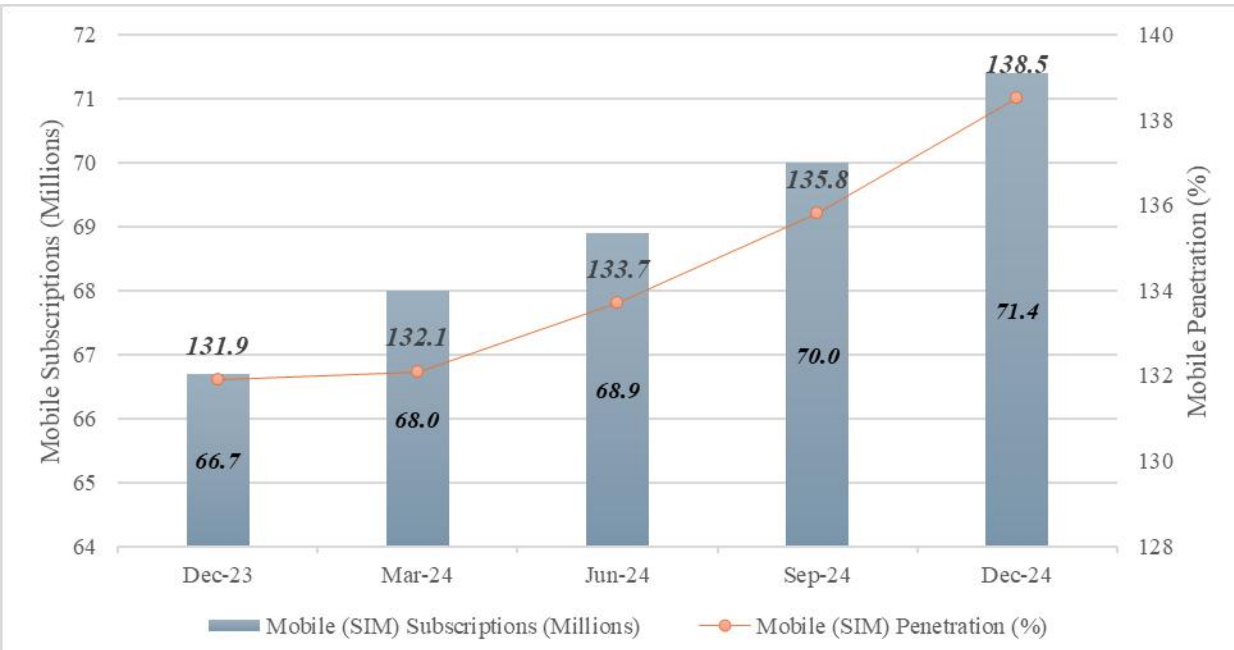
**Revised data*

1. MOBILE NETWORK SERVICES

1.1 Mobile (SIM) Subscriptions

The telecommunications sub-sector in the country experienced remarkable growth during the Second Quarter of the 2024/25 Financial Year running from October 1st to December 31st, 2024. Active[1] mobile (SIM) subscriptions grew by 2.0 percent in comparison to 1.6 percent growth recorded at the end of September 2024. This growth is mainly attributed to the busy festive season that runs within the same period pushing active SIMs to 71.4 million and a penetration rate of 138.5 percent.

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

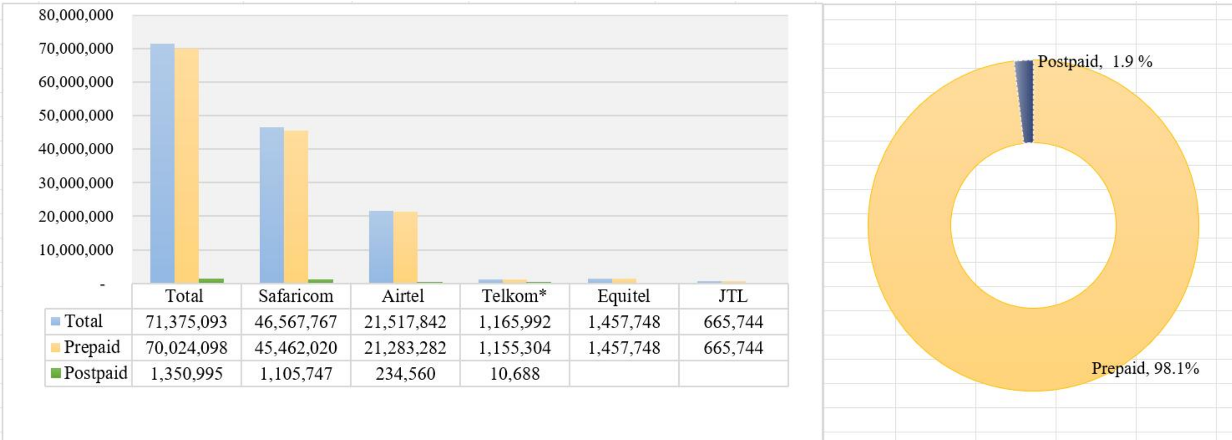


Source: CA, Operators' Returns,
Provisional Data for Telkom Kenya Limited

Figure 1: Mobile Subscriptions and Penetration

[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 (ITU Handbook on Telecom Administrative Data, 2020).

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



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

Figure 2: Mobile SIM Subscription by Contract Type

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

Machine-to-Machine (M2M) subscriptions grew by 8.6 percent to 1.9 million as shown in Table 1.

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

Indicator/Period	***Dec-24***	***Sep-24***	***Quarterly Variation (%)***
Machine to Machine (M2M)	1,915,997	1,764,574	8.6

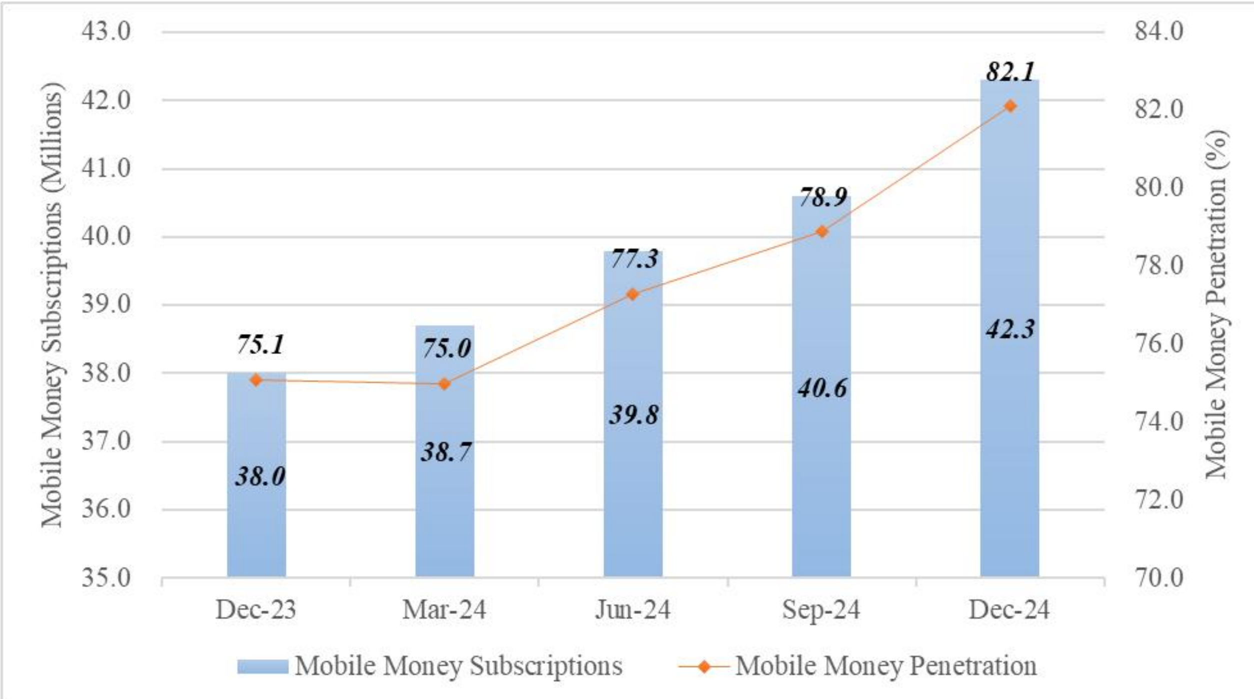
Source: CA, Operators' Returns,
Provisional Data for Telkom Kenya Limited

1.3 Mobile Money Services

Subscription to mobile money services grew by 4.1 percent to 42.3 million translating to a penetration rate of 82.1 percent during the reference period.

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

[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.



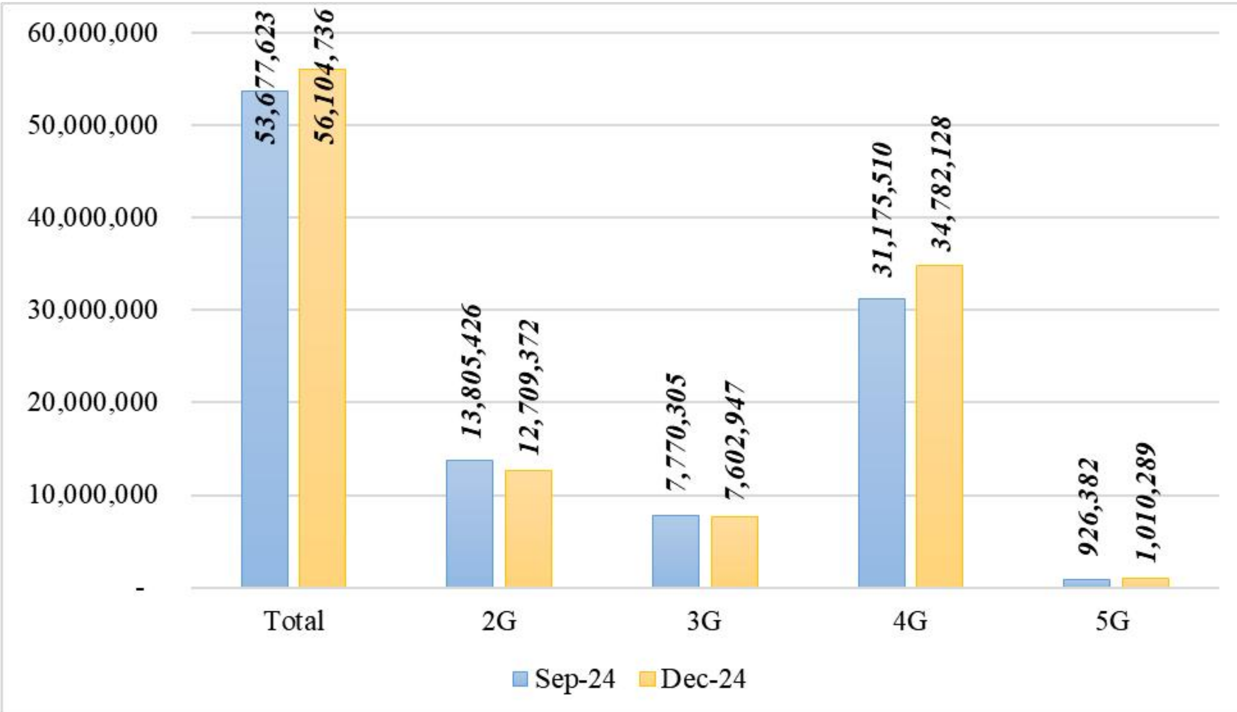
Source: CA, Operators' Returns,
Provisional Data for Telkom Kenya Limited

Figure 3:Mobile Money Services

1.4 Mobile Data and Broadband[3] Services

During the Second Quarter, mobile data subscriptions grew by 3.2 percent to 56.1 million of which 78.4 percent were on mobile broadband. Online activities such as streaming movies, online learning, remote work, and among others have accelerated demand for high-speed internet leading to increased uptake of higher generation mobile technologies as is the case of 4G and 5G.

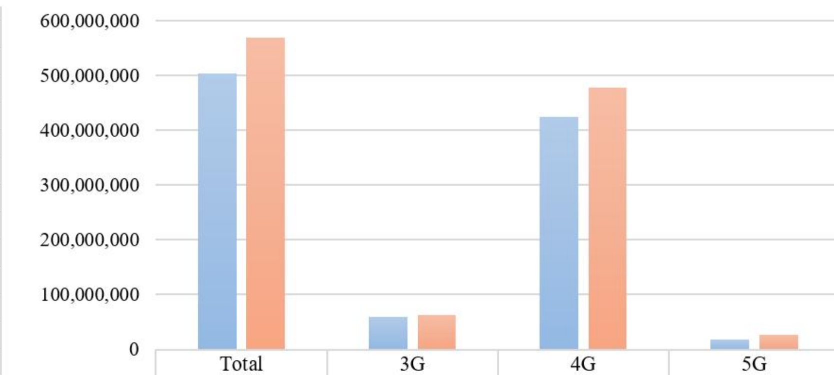
[3] **Mobile broadband** includes 3G, 4G and 5G



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

Figure 4: Mobile Data Subscriptions

Mobile broadband volume consumed during the reference period increased by 12.8 percent to 568,315.8 Terabytes. Consequently, the average mobile broadband consumption per mobile broadband subscription increased from 12.6 GB to 13.1 GB.



	Total	3G	4G	5G
	Mobile Broadband Consumption (GB)			
Jul-Sep 24	504,006,653	60,295,262	425,174,377	18,537,015
Oct-Dec 24	568,315,858	63,132,785	478,376,344	26,806,729

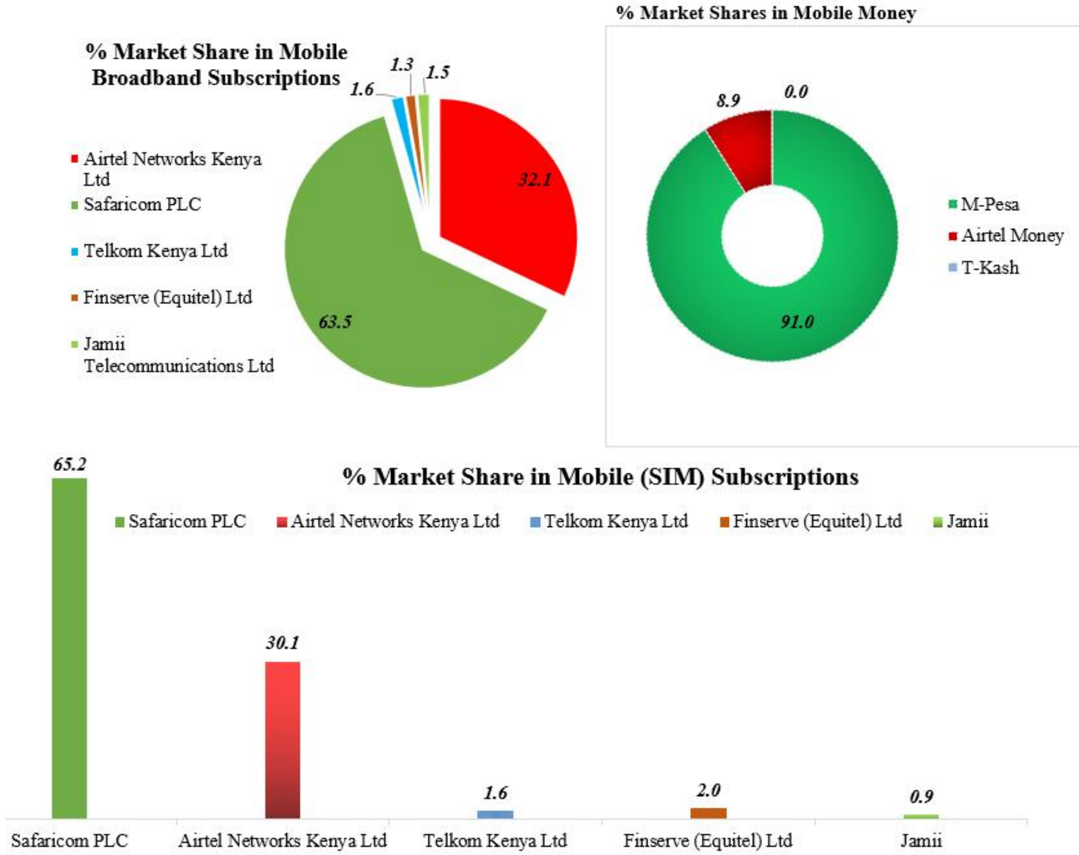
Average Mobile Broadband Consumption (GB) per Mobile Broadband Subscription	***Total***	***3G***	***4G***	***5G***
Jul-Sep 24	12.6	7.8	13.6	20.0
Oct-Dec 24	13.1	8.3	13.8	26.5

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

Figure 5: Mobile Broadband Subscriptions 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

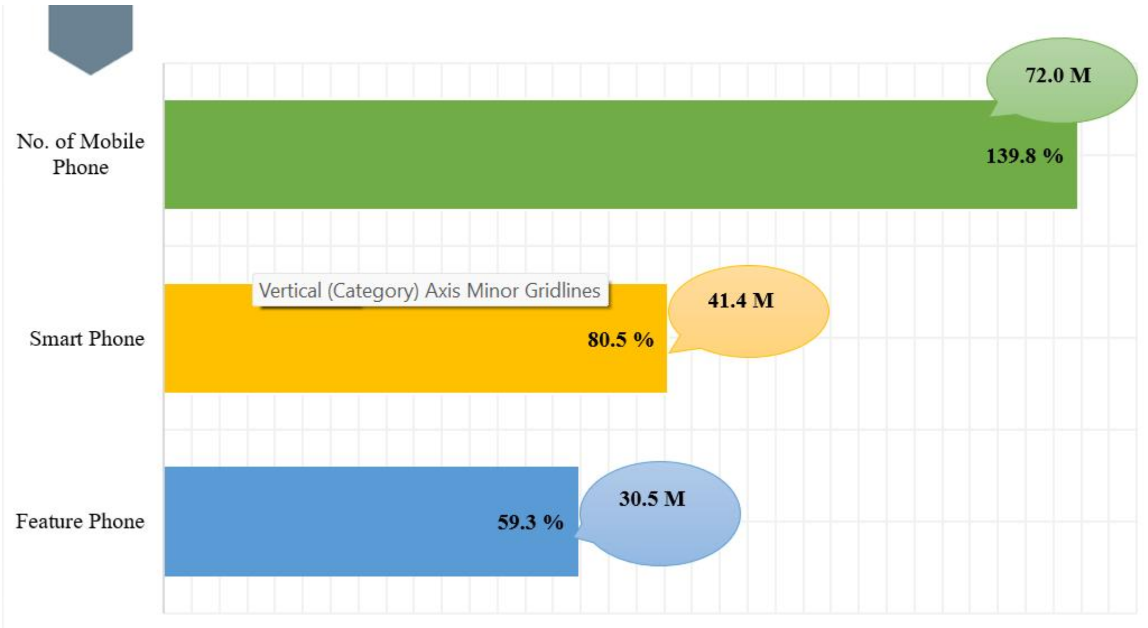
1.6 Mobile Phone Devices [4]

Mobile phone devices connected to mobile networks maintained an upward trend to post 72.0 million translating to penetration rate of 139.8 percent. Notably, smart phones maintained an upward trend at a penetration rate of 80.5 percent while feature phones dropped to 59.3 percent. The rapid uptake in smartphones is attributable to the increased expansion of mobile broadband networks across the country that currently stands at 97.0 percent population coverage. Increased

[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

availability and affordability of smartphones coupled with increased demand for access to digital services have significantly boosted smartphone penetration.

Figure 7 shows the number of smartphones and feature phones connected to mobile networks during the reference period and their respective penetration rates.



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

Figure 7: Mobile Phone Devices

1.7 Domestic Mobile Voice and SMS Traffic

Outgoing domestic voice traffic grew by 4.6 percent to record from 27.4 billion minutes. Similarly, domestic SMS traffic increased by 3.3 percent to 14.1 billion messages.

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***
Oct-Dec 24	***Outgoing Voice***	***Total***	**17,446,506,212**	**9,831,042,139**	**108,718,702**	**23,195,583**	**10,194,077**	**27,419,656,713**
		On-net	16,075,562,889	6,987,899,559	57,975,303	1,514,344	114,173	**23,123,066,268**
		Off-net	1,370,943,323	2,843,142,580	50,743,399	21,681,239	10,079,904	**4,296,590,445**
	Outgoing SMS	***Total***	**12,404,116,519**	**1,695,748,501**	**8,509,754**	**3,637,018**	**1,095,606**	**14,113,107,398**
		On-net	11,524,102,002	789,370,564	307,606	1,132,385	40,621	**12,314,953,178**
		Off-net	880,014,517	906,377,937	8,202,148	2,504,633	1,054,985	**1,798,154,220**
Jul-Sep	***Outg***	***Total***	**16,998,408,178**	**9,074,045,982**	**108,718,702**	**21,333,369**	**7,903,654**	**26,210,409,884**

24	***oing Voice***	*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**

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

1.8 Minutes of Use per Call per Operator

The total average minutes per on-net and off net calls remained the same as last quarter at 1.8 and 1.3 minutes respectively. Airtel Networks Limited reported the highest on-net minutes per call at 2.7 which was a drop from last quarter's 2.8 minutes. On the other hand, Safaricom PLC and Jamii Telecommunications Ltd reported the highest minutes per off net call at 1.4 like the previous quarter.

Table 3 shows the average minutes per call.

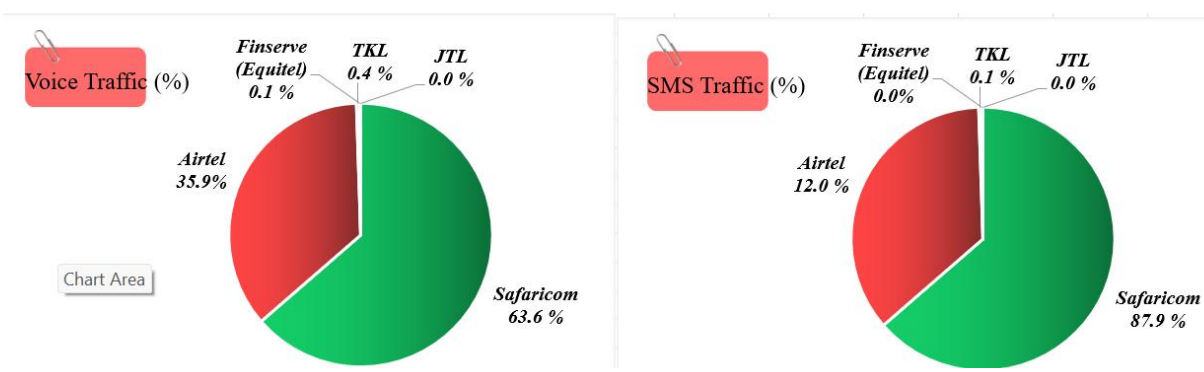
Table 3: MoU per Call

Period	***Oct-Dec 24***		***July-Sep 24***	
Operator/Indicator	**On-net**	**Off-net**	**On-net**	**Off-net**
Total Average	**1.8**	**1.3**	**1.8**	**1.3**
Safaricom PLC	1.6	1.4	1.6	1.4
Airtel Networks Limited	2.7	1.2	2.8	1.2
Telkom Kenya Limited*	1.5	1.2	1.5	1.2
Finserve (Equitel)	2.0	1.3	2.1	1.3
Jamii Telecommunications Ltd	0.1	1.4	0.1	1.4

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

1.9 Market shares in Domestic Mobile Voice and SMS Traffic

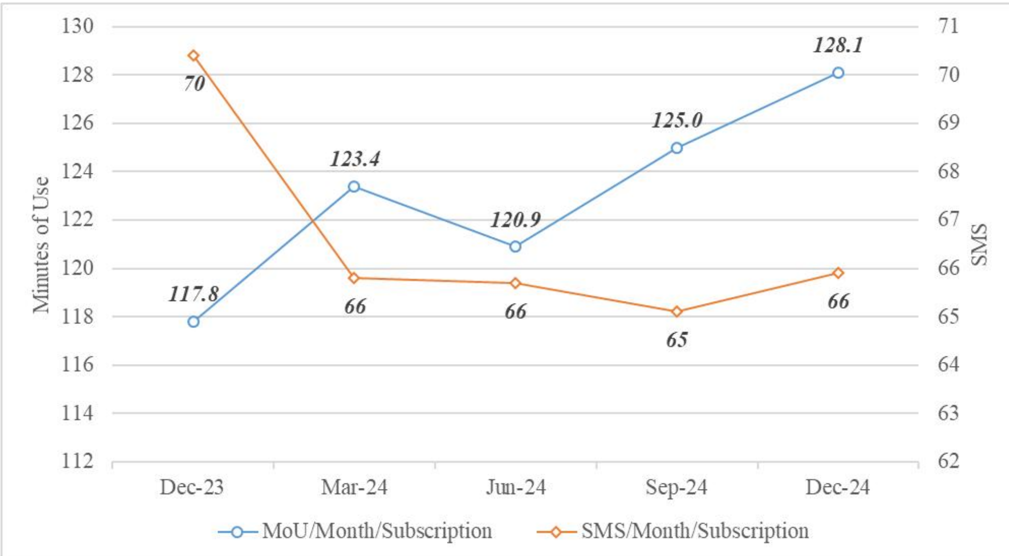
The market shares in domestic mobile voice and SMS traffic are as shown in Figure 8.



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



The Minutes of Use per subscription per month increased to 128.1 from 125.0 minutes whereas SMS per month per subscription increased to 66 from 65 messages.

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

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

1.11 International Mobile Traffic

Incoming international mobile voice minutes increased by 6.1 percent to 142.4 million whereas outgoing international mobile voice traffic increased by 1.2 percent to 177.3 million. International incoming mobile SMS declined to 7.3 million whereas outgoing mobile SMS increased to post 4.4 million as shown in Table 4.

Table 4: International Mobile Traffic

Indicator/Period	***Region***	***Oct-Dec 24***	***Jul-Sep 24***	***Quarterly Variation (%)***
Incoming International Mobile Voice Minutes	*EAC*	106,503,088	104,315,553	2.1
	Others	35,973,434	29,931,817	20.2
	Total	**142,476,522**	**134,247,370**	**6.1**
Outgoing International Mobile Voice Minutes	*EAC*	136,589,868	116,182,986	17.6
	Others	40,729,670	59,078,249	-31.1
	Total	**177,319,538**	**175,261,235**	**1.2**
Incoming International Mobile SMS		7,321,545	8,438,174	-13.2
Outgoing International Mobile SMS		4,442,686	2,605,963	70.5

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

1.12 Roaming Traffic

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

Table 5: Outbound Roaming Traffic

Country / Indicator	*Incoming Voice (Minutes)*	*Incoming SMS*	*Outgoing Voice (Minutes)*	*Outgoing SMS*	*Data Volumes (MB)*
Uganda	123,292,968	4,339	3,227,560	1,377,884	50,667,031
Tanzania	16,185,255	18,920,647	995,238	749,766	16,186,253
Rwanda	3,423,088	10	343,837	113,038	4,868,381
Burundi	51,590	1,326,700	3,441	5,559	15,610
S. Sudan	5,814,403	1,642	540,708	186,160	441,008
Democratic Republic of Congo	5,271	101,592	270,174	30,143	11,194,059
EAC Total	148,772,575	20,354,930	5,380,958	2,462,550	83,372,342
Others	1,045,337	62,145,924	3,216,321	3,027,535	49,871,225
Total	**149,817,912**	**82,500,854**	**8,597,279**	**5,490,085**	**133,243,567**

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

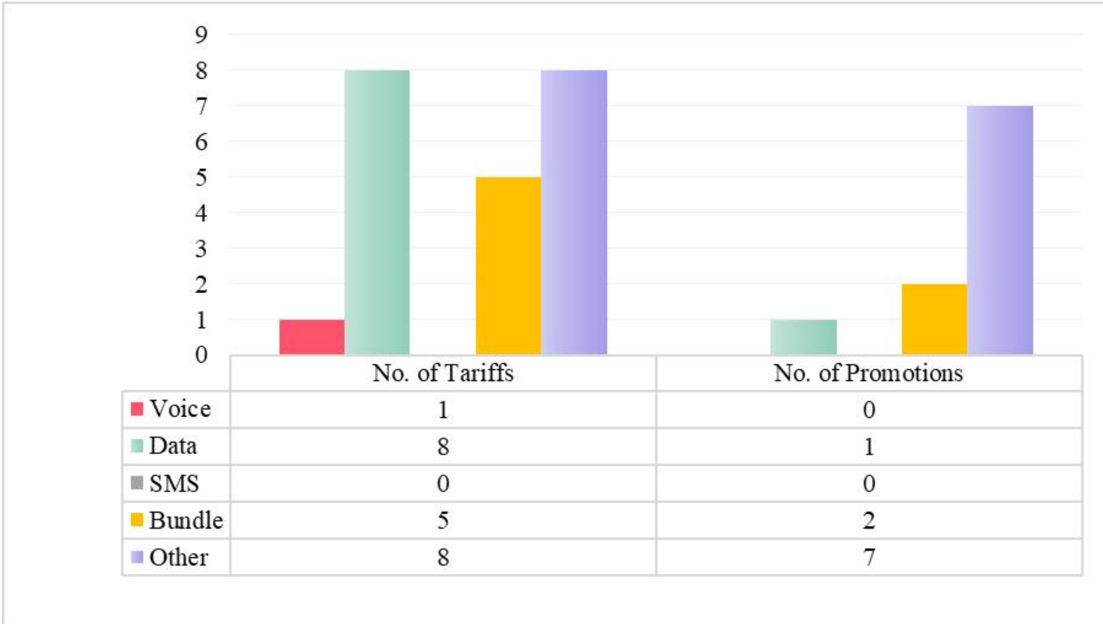
Table 6: In-bound Roaming Traffic

Country / Indicator	*Incoming Voice (Minutes)*	*Incoming SMS*	*Outgoing Voice (Minutes)*	*Outgoing SMS*	*Data Volumes (MB)*
Uganda	28,290,466	5,200,147	1,733,510	210,580	25,295,407
Tanzania	115,664,813	19,999,735	606,629	279,490	2,413,288
Rwanda	22,892,686	2,963,159	176,144	34,085	345,579
Burundi	288,674	5,502	201,769	9,861	146
S. Sudan	669,598	1,552,233	148,504	22,479	157,509
Democratic Republic of Congo	6,150	180,579	50,193	7,874	245,110
EAC Total	167,812,387	29,901,355	2,916,749	564,369	28,457,039
Others	1,121,620	25,309,265	2,078,649	1,661,039	482,425,129
Total	**168,934,007**	**55,210,620**	**4,995,398**	**2,225,408**	**510,882,168**

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

1.13 Tariffs, Promotions and Special Offers

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



Source: Operator Applications for 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

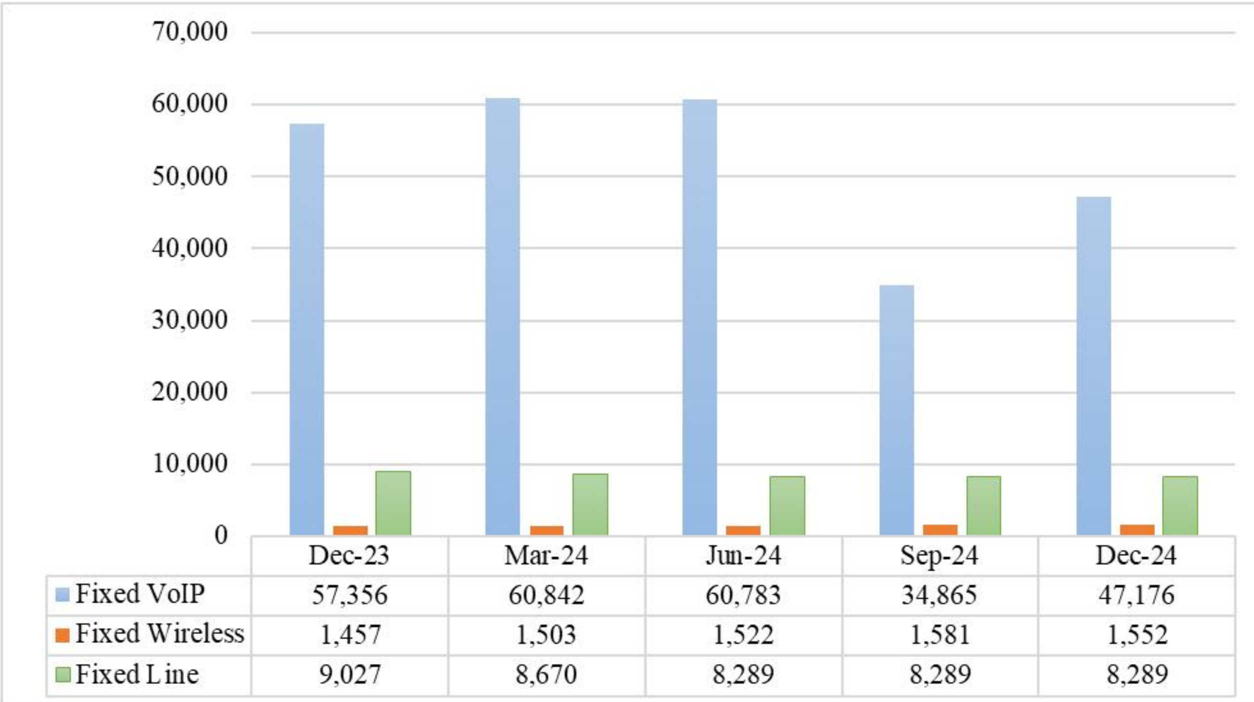
Operator/Market	***Average Voice (KES/Min)***	***SMS (KES/SMS)***	***Data (KES/MB)***
Safaricom PLC	4.87	1.20	4.87
Airtel Network Limited	2.78	1.20	4.50
	4.50	1.20	4.50
Telkom Kenya Limited	3.54	1.15	4.50
Average	**3.92**	**1.19**	**4.59**

Source: Operator Applications for tariffs

2. FIXED NETWORK SERVICES

2.1 Fixed Telephone Subscriptions

Fixed Voice over IP (VoIP) subscriptions increased by 35.3 per cent to 47,176 during the quarter under review as shown in Figure 11.



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

Figure 11: Fixed Voice Subscriptions

2.2 Domestic Fixed Voice Traffic

Table 8 shows the trends in local fixed voice network traffic.

Table 8: Domestic Fixed Voice Traffic

Domestic Fixed Voice Traffic (Minutes)	***Oct-Dec 24***	***Jul-Sep 24***	***Quarterly Variation (%)***
Fixed-Fixed*	109,613	109,613	0.0
Fixed Wireless-Fixed Wireless	283,264	264,344	7.2
Fixed to Mobile*	19,946,421	19,946,421	0.0
Total Domestic Fixed Network Traffic	**20,339,298**	**20,320,378**	**0.1**

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

2.3 International Fixed Voice Traffic

Table 9 shows the volume of international fixed voice traffic recorded during the second quarter.

Table 9: International Fixed Voice Traffic

Indicator/Period	*Oct-Dec 24*	*Jul-Sep*	*Quarterly Variation (%)*
International Incoming Fixed Network Voice* traffic	4,868,590	5,016,838	-3.0
International Outgoing Fixed Network Voice traffic*	1,000,530	994,563	0.6
International Outgoing Fixed VoIP traffic	504,565	538,175	-6.2

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

2.4 Fixed Internet Subscriptions by Technology

As of the period end, fixed Internet subscriptions experienced growth except for cable modem subscriptions, which dropped by 5.8 percent to 188,541 as shown in Table 10.

Table 10: Fixed Internet Subscriptions by Technology

Indicator/Period	*Dec 24*	*Sep 24*	*Quarterly Variation (%)*
Total Wireless Subscriptions	**462,071**	**379,144**	**21.9**
Terrestrial Wireless Data Subscribers	442,668	362,102	22.2
Satellite Data Subscribers	19,403	17,042	13.9
Total Fixed (Wired) Subscriptions	**1,256,608**	**1,195,679**	**5.1**
Fixed DSL Data Subscribers (Copper)	137	137	0.0
Fixed Fibre Optic Data Subscribers	1,066,972	994,444	7.3
Fixed Cable Modem Subscribers	188,541	200,212	-5.8
Other Fixed Data Subscribers (e.g. Radio)	958	886	8.1
Total Subscriptions	**1,718,679**	**1,574,823**	**9.1**

Source: CA, Operators' Returns,
Provisional data for Telkom Kenya Ltd

2.5 Fixed Data and Broadband Subscriptions

During the reference period, most customers (39.7%) subscribed to data speeds between 10 Mbps and 30 Mbps, marking a shift from previous quarters during which most customers had subscribed to data speeds between 2Mbps and 10Mbps.

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

Table 11: Narrowband and Broadband Subscriptions

Internet Technology/Speeds	*<256Kbps*	*=>256Kbps < 2Mbps*	*=>2<10 Mbps*	*=>10<30 Mbps*	*=>30<100Mbps*	*=>100 Mbps <1Gbps*	*=>1Gbps*
Cable Modem	0	0	25,619	156,032	6,715	175	0
Copper (DSL)	4	7	126	0	0	0	0
FTTH	0	3,370	209,373	471,373	154,085	138,918	0
FTTO	1	4,439	12,016	31,671	22,405	19,051	270
Fixed Wireless	18,790	8,569	363,365	22,958	27,965	1,020	1
Satellite	4	115	6	114	0	19,162	2
Other Fixed	0	78	544	241	95	0	0
Totals	**18,799**	**16,578**	**611,049**	**682,389**	**211,265**	**178,326**	**273**

Source: CA, Operators' Returns,
Provisional data for Telkom Kenya Ltd,

2.6 Fixed Data Subscriptions by Operator

Vilcom Network Limited doubled its market share during the reference period following the launch of a new product by the service provider.

Table 12 shows the top 10 companies in fixed data subscriptions.

Table 12: Fixed Data Subscriptions by Operator

Service Provider/Indicator	*Number of Data Subscriptions*	*Percentage Market Share (%)*
Safaricom PLC	621,149	36.1
Jamii Telecommunications Ltd	405,646	23.6
Wananchi Group (Kenya) Ltd**	264,206	15.4
Poa Internet Kenya Ltd	238,030	13.8
Vilcom Network Limited	54,991	3.2
Mawingu Networks Ltd	48,555	2.8
Starlink Internet Services Kenya	19,146	1.1
Dimension Data Solutions East Africa Ltd	18,431	1.1
Liquid Telecommunications Kenya	16,232	0.9
Vijiji Connect Ltd	11,347	0.7
Other Fixed Service Providers	20,946	1.2

Source: CA, Operators' Returns,
*** Includes Wananchi Group Ltd, Simbanet, and Wananchi Telecom Ltd.*

2.7 International Bandwidth

The total available international Internet bandwidth capacity in the country remained unchanged at 22,154.438 Gbps. This is because the undersea cable providers did not lease any additional capacity within the quarter. However, the total utilized undersea bandwidth capacity rose by 1.3 per cent to 15,479.860 Gbps, out of which 12,526.040 Gbps were used in the country whereas 2,953.820 Gbps were sold outside the country. Notably, utilized satellite capacity increased by 74.9 per cent during the quarter and was mainly driven by the growing uptake of LEO satellite internet services in the country.

The international Internet bandwidth available and utilized is as shown in Table 13.

Table 13: International Internet Bandwidth (Gbps)

Indicator/ Period	*Oct-Dec 24*			*Jul-Sep 24*		*Quarterly Variation (%)*
Total Available (Lit/Equip) Bandwidth Capacity (Gbps)			**22,154.438**		**22,154.438**	**0.0**
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		0.438	0.0
Total Utilized Bandwidth Capacity (Gbps)						
Undersea Bandwidth Capacity	***Sold In Kenya***	***Sold in other Countries***		***Sold In Kenya***	***Sold in other Countries***	
	12,526.040		2,953.820	12,333.402	2,953.820	1.3
Satellite Internet Capacity			34,141,040.438		19,516,150.438***	74.9

Source: CA, Operators' Returns,

****Revised Data (utilized capacity initially reported for Starlink was average peak capacity and not total capacity utilized within the quarter)*

3. POSTAL AND COURIER SERVICES

3.1 Designated Postal Operator (PCK) Traffic

Domestic letters and parcels sent through the designated postal operator (PCK) during the quarter grew by 1.1 and 18.2 percent, respectively, compared to the preceding quarter. On the other hand, international outgoing letters and international incoming parcels declined by 21.9 and 20.2 percent to record 6,708 and 324,671 items respectively as shown in Table 14.

Table 14: Postal Items

Indicator/Period		***Oct-Dec 24***	***Jul-Sep 24***	***Quarterly Variation (%)***
Letters	Domestic	815,075	806,045	1.1
	International Outgoing	6,708	8,593	-21.9
	International Incoming	500,263	426,661	17.3
Parcels	Domestic	641,262	542,325	18.2
	International Outgoing	19,369	4,290	351.5
	International Incoming	324,671	406,896	-20.2

Source: CA, Operators' Returns

3.2 Courier Traffic

Domestic letters and parcels sent through private courier operators declined by 15.4 and 0.2 percent to record 813,741 and 3,706,664, respectively, as shown in Table 15.

Table 15: Courier Items

Indicator/Period		***Oct-Dec 24***	***Jul-Sep 24***	***Quarterly Variation (%)***
Letters	Domestic	813,741	962,411	-15.4
	International Outgoing	15,502	7,053	119.8
	International Incoming	35,088	6,948	405.0
Parcels	Domestic	3,706,664	3,712,537***	-0.2
	International Outgoing	22,927	141,668	-83.8
	International Incoming	206,369	729,834	-71.7

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

4. BROADCASTING SERVICES

4.1 Subscription to Broadcasting Services

Subscriptions to broadcasting services grew by 1.0 percent compared to the previous quarter as shown in Table 16.

Table 16: Broadcasting Subscriptions

Indicator/Period		***Dec-24***	***Sep-24***	***Quarterly Variation (%)***
DTT	Go TV	2,824,896	2,806,516	0.7
	Star Times	1,710,029	1,703,907	0.4
	Sub-Total	**4,534,925**	**4,510,423**	**0.5**
DTH	Azam	28,190	26,723	5.5
	MultiChoice (DSTV)	1,224,623	1,211,305	1.1
	Star Times	186,587	184,827	1.0
	Wananchi (Zuku)	154,837	139,783	10.8
	Sub-Total	**1,594,237**	**1,562,638**	**2.0**
Cable	Cable One	1,333	1,444	-7.7
	CTN (MSA)	2,571	2,082	23.5
	Wananchi (ZUKU)	58,792	56,515	4.0
	Hirani	758	758	0.0
	Wadani Cable	95	95	0.0
	Sub-Total	**63,549**	**60,894**	**4.4**
Total		**6,192,711**	**6,133,955**	**1.0**

Source: CA, Operators' Returns

5. FREQUENCY SPECTRUM MANAGEMENT

The number of microwave links assigned by the Authority for deployment increased by 3.0 percent whereas assigned FM sound broadcasting frequencies increased by 0.8 percent as shown in Table 17.

Table 17: Frequency Spectrum Management

Indicator/Period	***Oct-Dec 24***	***Jul-Sep 24******	***Quarterly Variation (%)***
Assigned Microwave Links for Deployment	11,249	10,924	3.0
FM Sound Broadcasting Frequencies Assigned	1,055	1,047	0.8

Source: CA,
****Revised Data*

6. ELECTRONIC TRANSACTIONS AND CYBER SPACE MANAGEMENT

6.1 Registered Domain Names

The number of users registered to .KE domain grew by 1.3 percent to 108,154. However, users registered to Personal Websites and E-mail dropped by 24.6 percent to 3,462 by end of December 2024 as shown in Table 18.

Table 18: .KE Domains

SUB-DOMAIN	*USER*	*Number of Users*		
		Dec-24	*Sep-24*	*Quarterly Variation (%)*
Total		**108,154**	**106,722**	**1.3**
CO.KE	Companies	92,669	91,095	1.7
.KE	Second level	6,458	5,870	10.0
ME.KE	Personal Websites and E-mail	3,462	4,590	-24.6
OR.KE	Non-Profit-Making Organizations	2,116	1,998	5.9
AC.KE	Institutions of Higher Education	1,315	1,196	9.9
SC.KE	Lower and Middle-Level Institutions	1,031	910	13.3
GO.KE	Government Institutions	823	790	4.2
INFO.KE	Information	201	197	2.0
NE.KE	Personal Websites and E-mail	51	48	6.3
MOBI.KE	Mobile Content	28	28	0.0

Source: Kenic

6.2 National Cyber Space Landscape

The total number of cyber threats detected during the quarter increased by 27.2 percent to 840.9 million. In response to cyber threat events detected, the National KE-CIRT/CC issued 11.6 million advisories marking 20.9 percent increase compared to last quarter as shown in Table 19.

Table 19: Cybersecurity Landscape

Indicator/Period	*Threats and Advisories*	*Oct-Dec 24*	*Jul-Sep 24*	*Quarterly Variation (%)*
Threats	Malware	33,920,406	33,894,268	0.1
	Brute Force Attacks	34,784,028	38,135,186	-8.8
	Web Application Attacks	4,542,939	3,520,651***	29.0
	System Vulnerabilities	752,441,233	583,696,090	28.9
	Mobile Application Attacks	138,175	117,661	17.4
	DDOS	15,095,217	1,826,259	726.6
	Total Cyber Threats	**840,921,998**	**661,190,115**	**27.2**
Advisories	Malware	404,598	285,133	41.9

	Brute Force Attacks	1,279,310	1,058,919	20.8
	Web Application Attacks	4,445,334	3,384,137	31.4
	System Attacks	5,146,931	4,631,429	11.1
	Mobile Application Attacks	8,215	6,599	24.5
	DDOS	300,193	215,667	39.2
	Total Cyber Advisories	**11,584,581**	**9,581,884**	**20.9**

*Source: National KE-CIRT/CC, ***Revised Data*

7. CONCLUSION

The second quarter is often marked by growth across the different sub-sectors mainly because of the busy festive season that fell within the same period and last quarter was no exception. During the quarter, there was a general increase in SIM subscriptions, mobile money and mobile data subscriptions. Further, the increase in smartphone penetration coupled with increased need for online activities such as streaming movies, online learning, remote work among others accelerated demand for high-speed internet leading to increased uptake of mobile broadband especially 4G and 5G. A similar trend was observed in fixed broadband where most customers subscribed to higher data speeds between 10 Mbps and 30 Mbps, marking a shift from previous quarters during which most customers subscribed to data speeds between 2Mbps and 10Mbps. Also, there was a remarkable increase in utilized satellite internet bandwidth driven mainly by the increased uptake of LEO satellite internet services in the country.