FIRST QUARTER SECTOR STATISTICS REPORT FOR THE FINANCIAL YEAR 2025/2026
(1ST JULY – 30TH SEPTEMBER 2025)

Direct any queries on the report to:
Director/Competition Management, Consumer Protection and Corporate Communications
Tel: +254-703 042284, +254 -02042284
Email: info@ca.go.ke
Website: www.ca.go.ke

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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 on usage/uptake of ICTs) 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 First Quarter Sector Statistics Report for the Financial Year highlights the performance and trends in supply and uptake of ICT services for the period 1st July to 30th September 2025 in the following categories:

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	*Q1(Jul-Sep 25)*	*Q4(Apr-Jun 25)*	*Quarterly Variation (%)*
MOBILE NETWORK SERVICES			
Subscriptions to Mobile Services			
Total Mobile (SIM) Subscriptions	78,315,384	76,690,718	2.1
Machine-to-Machine (M2M) Subscriptions	1,862,722	1,789,785	4.1
Mobile Money Transfer Services			
Number of Registered Mobile Money Agents	480,216	453,480	5.9
Mobile Money Subscriptions	48,630,797	47,720,195	1.9
Mobile Data and Broadband Subscriptions			
Mobile Data Subscriptions	60,269,091	58,575,082	2.9
Mobile Broadband Subscriptions	47,166,556	45,790,990	3.0
Mobile Phone Devices			
Feature Phones	30,396,487	29,478,816	3.1
Smartphones	44,653,325	43,751,716	2.1
Domestic Mobile Traffic			
Mobile Voice Traffic (Minutes)			
On-Net Voice Traffic	25,068,388,953	24,531,457,961	2.2
Off-Net Voice Traffic	4,866,305,845	4,634,277,880	5.0
Mobile to Fixed Network	6,069,984	6,069,984	0.0
Mobile SMS Traffic			
SMS On-Net	13,185,479,730	13,537,684,359	-2.6
SMS Off-Net	1,477,466,349	1,709,805,669	-13.6
International Mobile Traffic			
Mobile Voice Traffic (Minutes)			
International Incoming Mobile Voice Traffic	166,109,823	167,199,882	-0.7
International Outgoing Mobile Voice Traffic	220,911,990	200,269,701	10.3
Mobile SMS Traffic			
International Incoming SMS	5,442,624	5,631,540	-3.4
International Outgoing SMS	2,536,777	2,704,693	-6.2
Roaming Traffic			
Out - bound Roaming Traffic			
Out-bound Roaming Incoming Voice Traffic (Minutes)	156,235,425	173,773,912	-10.1
Out-bound Roaming Outgoing Voice Traffic (Minutes)	10,653,029	9,569,787	11.3
Out-bound Roaming Incoming SMS	105,122,702	94,780,440	10.9
Out-bound Roaming Outgoing SMS	5,287,884	4,509,445	17.3
Data Volumes (MB)	128,776,797	124,558,442	3.4
In-bound Roaming Traffic			
In-bound Roaming Incoming Voice Traffic (Minutes)	181,884,370	177,007,587	2.8
In-bound Roaming Outgoing Voice Traffic (Minutes)	4,454,066	4,204,367	5.9
In-bound Roaming Incoming SMS	71,716,155	57,144,021	25.5
In-bound Roaming Outgoing SMS	2,467,467	1,696,894	45.4
Data Volumes (MB)	922,010,152	553,927,711	66.4
FIXED NETWORK SERVICES			
Fixed Voice Subscriptions			
Fixed Line Subscriptions	6,095	6,095	0.0
Fixed Wireless Subscriptions	1,654	1,651	0.2
Fixed VoIP Subscriptions	47,842	47,555	0.6
Domestic Fixed Voice Traffic			
Fixed line-Fixed line	89,868	89,868	0.0
Fixed Wireless-Fixed Wireless	330,381	315,263	4.8
Fixed to Mobile	705,984	705,984	0.0
International Fixed Voice Traffic			

Indicator/Period	*Q1(Jul-Sep 25)*	*Q4(Apr-Jun 25)*	*Quarterly Variation (%)*
Incoming Fixed Voice Traffic	4,132,477	5,042,602	-18.0
Outgoing Fixed Voice Traffic	890,675	874,473	1.9
Outgoing Fixed VOIP	483,307	515,682	-6.3
Fixed Data and Broadband Services			
Fixed Data/internet subscriptions	2,291,863	2,144,713	6.9
Total Available International Bandwidth (Gbps)	22,311.445	22,311.445*	0.0
Total Used International Bandwidth (Gbps)	14,066.326	13,689.265	2.8
POSTAL AND COURIER SERVICES			
Postal Traffic			
Domestic Letters	144,087	174,057	-17.2
International Outgoing Letters	21,019	17,106	22.9
International Incoming Letters	27,906	24,571	13.6
Domestic Parcels	113,874	141,932	-19.8
International Outgoing Parcels	15,396	13,020	18.2
International Incoming Parcels	57,154	107,035	-46.6
Courier Traffic			
Domestic Letters	883,278	770,896	14.6
International Outgoing Letters	14,834	8,738	69.8
International Incoming Letters	33,061	32,040	3.2
Domestic Parcels	3,438,959	3,365,968	2.2
International Outgoing Parcels	27,619	24,809	11.3
International Incoming Parcels	134,185	187,802	-28.5
BROADCASTING SERVICES			
DTT Subscriptions	944,913	806,850	17.1
DTH Subscriptions	686,604	602,706	13.9
Cable Subscriptions	47,125	66,865	-29.5
FREQUENCY SPECTRUM MANAGEMENT			
Microwave links Deployed	9,994	10,311	-3.1
FM Sound Broadcasting Frequencies Assigned	969	1,010	-4.1
ELECTRONIC TRANSACTIONS AND CYBERSPACE MANAGEMENT			
.KE Domain	115,653	111,313	3.9
Total Cyber Threats Detected	842,320,667	4,586,682,277	-81.6
Total Cyber Threat Advisories	19,951,154	17,269,049	15.5
POPULATION			
Total Population in Kenya (Millions) **	52,428,290	52,428,290	0.0

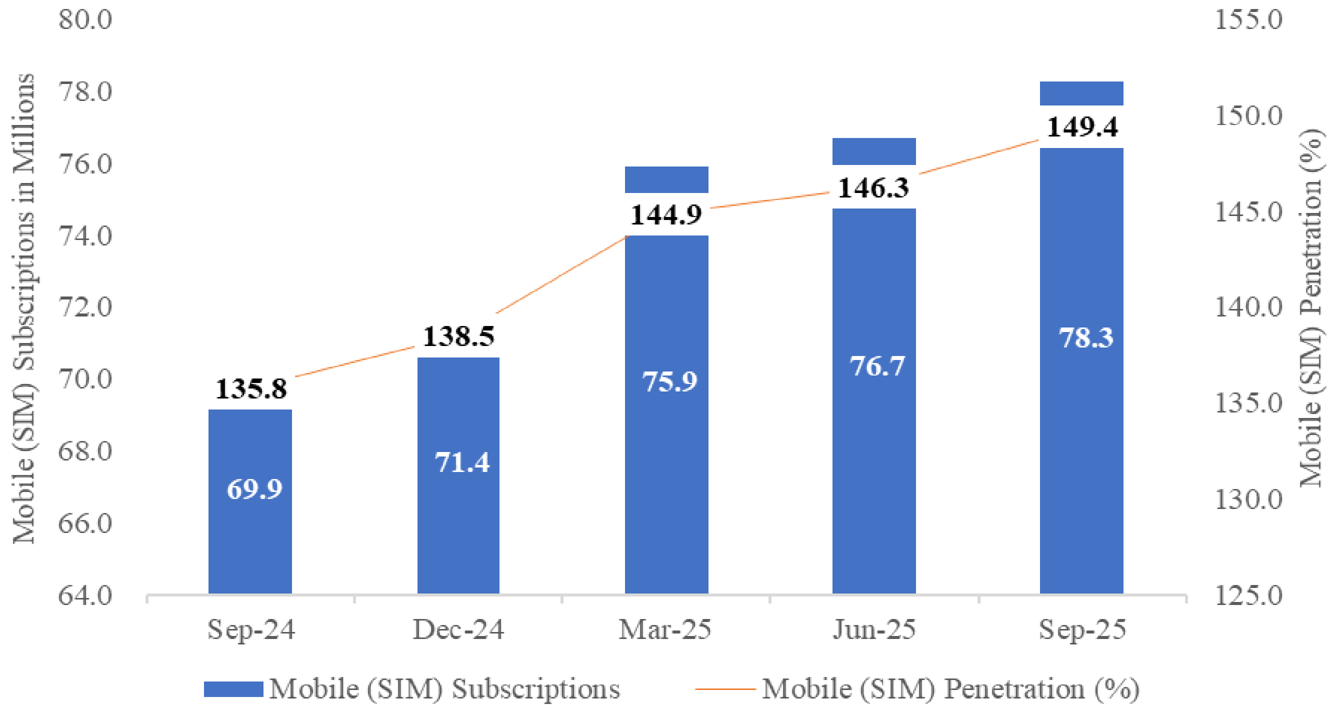
**Revised Data , **Economic Survey 2025, Provisional data for TKL*

1. MOBILE NETWORK SERVICES

1.1 Mobile (SIM) Subscriptions

During the first quarter of FY 2025/26, mobile (SIM) subscriptions grew by 2.1 per cent to 78.3 million, marking a penetration rate of 149.4 per cent as of 30th September 2025, as shown in Figure 1. This growth is mainly attributed to the continued expansion of mobile networks and ever-growing demand for mobile services.

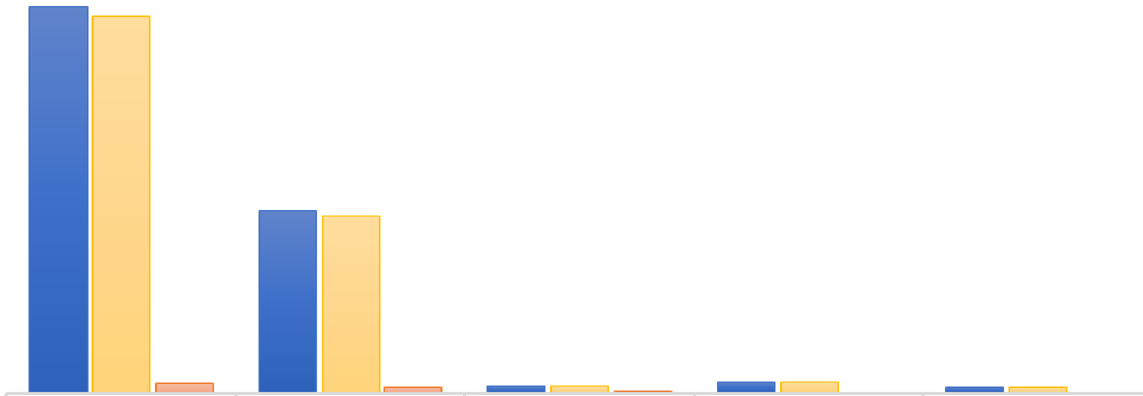
Figure 1 illustrates the trends in mobile (SIM) subscriptions and the respective penetration rates.



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

Figure 1: Mobile Subscriptions and Penetration

The ratio of pre-paid to postpaid mobile subscriptions was 98.0 to 2.0. The number of active mobile (SIM) subscriptions per operator by contract type is as shown in Figure 2.



	Safaricom	Airtel	Telkom	Finserve	Jamii
Total	51,124,664	24,057,518	868,788	1,493,295	771,119
Prepaid	49,863,831	23,392,149	858,650	1,493,295	771,119
Postpaid	1,260,833	665,369	10,138	-	-

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

Figure 2: Mobile Subscription per Operator

1.2 Machine-to-Machine (M2M) Subscriptions

Machine-to-Machine (M2M) subscriptions that comprise SIM cards assigned for use in machines grew by 4.1 per cent to 1.86 million as at the end of the reference period as shown in Table 1.

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

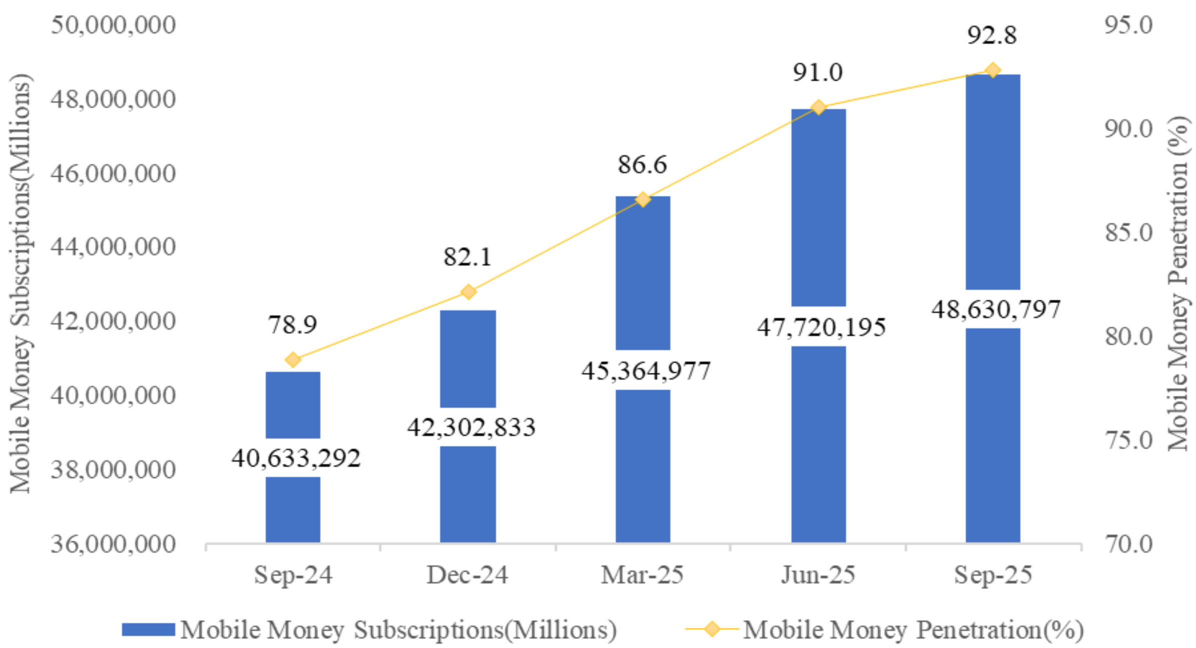
Indicator/Period	*Sep-25*	*Jun-25*	*Quarterly Variation (%)*	*Sep-24*	*Annual Variation (%)*
Machine to Machine (M2M)	1,862,722	1,789,785	4.1	1,764,574	5.6

*Source: CA, Operators', * Revised data for Telkom Kenya Limited*

1.3 Mobile Money Services

By end of the reference period, mobile money subscriptions were at 48.6 million translating to a penetration rate of 92.8 per cent compared to 91.0 per cent reported by end of June 2025.

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



Source: CA, Operators' Returns,

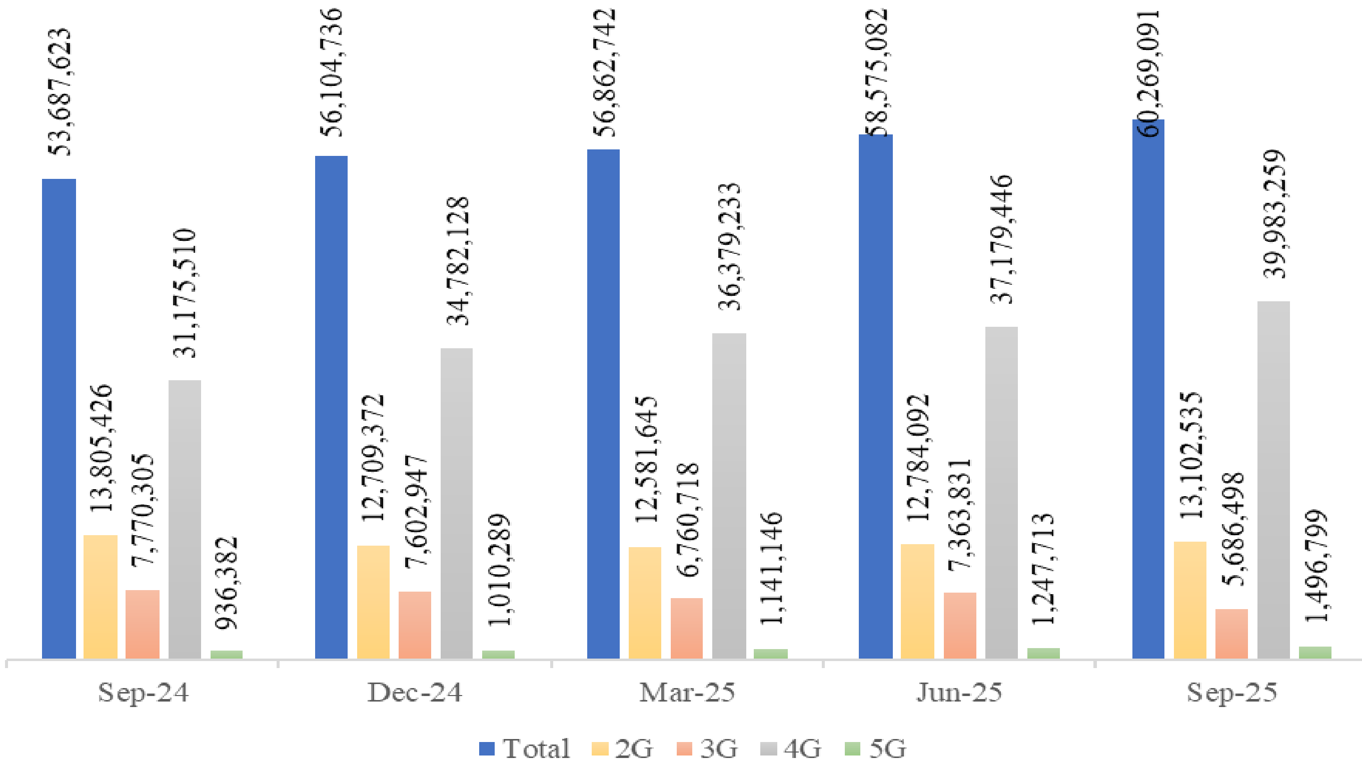
Figure 3:Mobile Money Services

1.4 Mobile Data and Broadband[1] Services

Mobile data remains to be a fundamental drive for internet connectivity in the country fostering socio-economic development and expanding access to services and information. Mobile data subscriptions were recorded at 60.2 million by end of the first quarter of the current financial year, of which 78.3 per cent were on mobile broadband.

Notably, 4G subscriptions constituted 84.8 per cent of the total mobile broadband subscriptions. The uptake of mobile data/internet services for the past five (5) quarters is as shown in Figure 4.

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

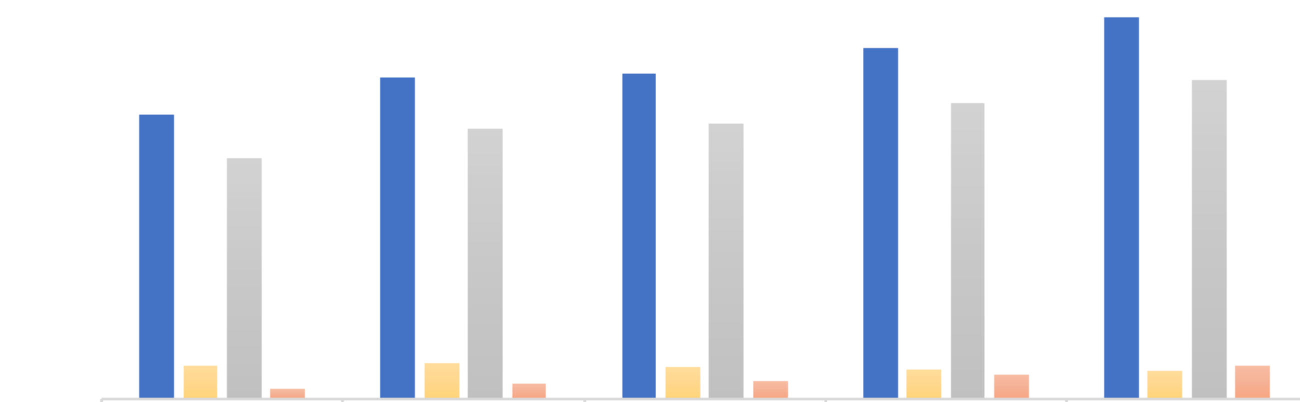


Source: CA, Operators' Returns, Provisional Data for Telkom Kenya Limited

Figure 4: Mobile Data Subscriptions

Data consumption across 4G and 5G technologies continued to grow while 3G maintained a downward trend as shown in Figure 5.

Mobile Broadband Consumption (GB)

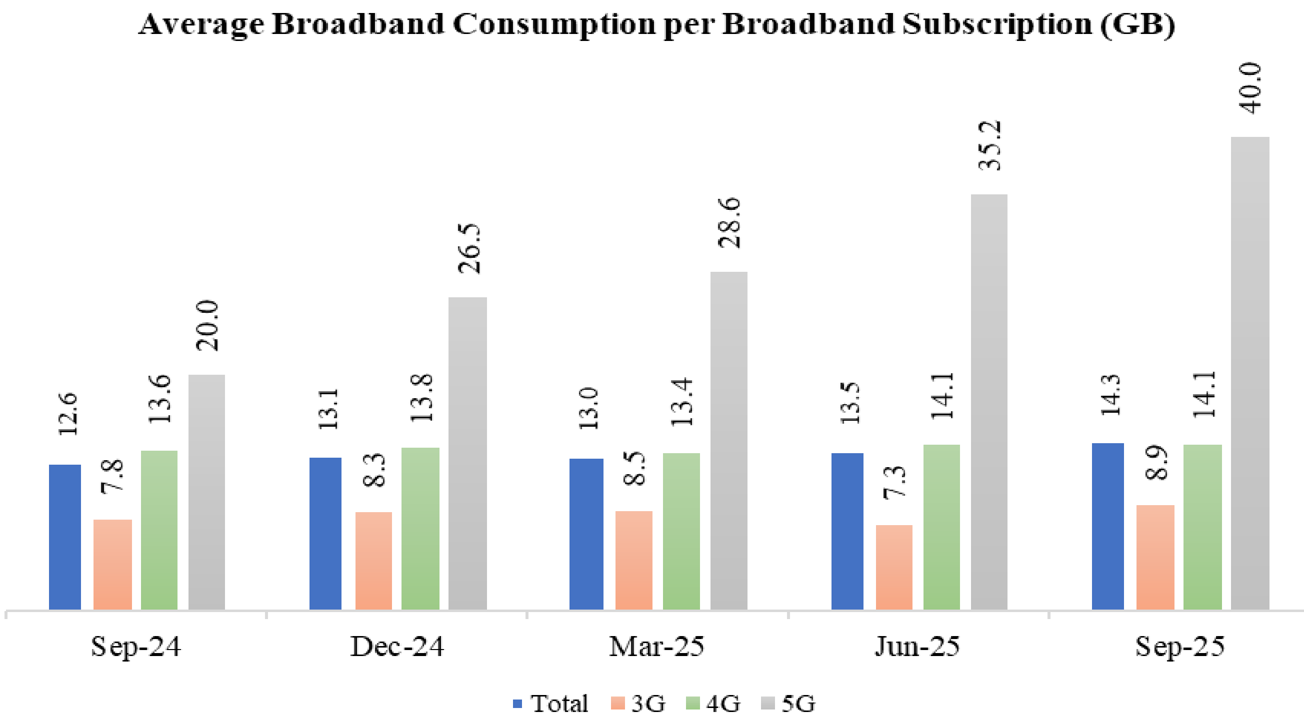


	Sep-24	Dec-24	Mar-25	Jun-25	Sep-25
Total	504,006,653	568,315,858	576,458,811	620,189,223	674,240,311
3G	60,295,262	63,132,785	57,332,406	53,758,937	50,857,209
4G	425,174,377	478,376,344	486,514,702	522,564,678	563,537,816
5G	18,537,015	26,806,729	32,611,704	43,865,608	59,845,286

Source: CA, Operators', Provisional data for Telkom Kenya Limited

Figure 5: Mobile Broadband Consumption

The average mobile broadband consumption per broadband subscription was 14.3 GB with 5G users recording the highest consumption at 40.0 GB followed by 4G at 14.1 GB as shown in Figure 6.

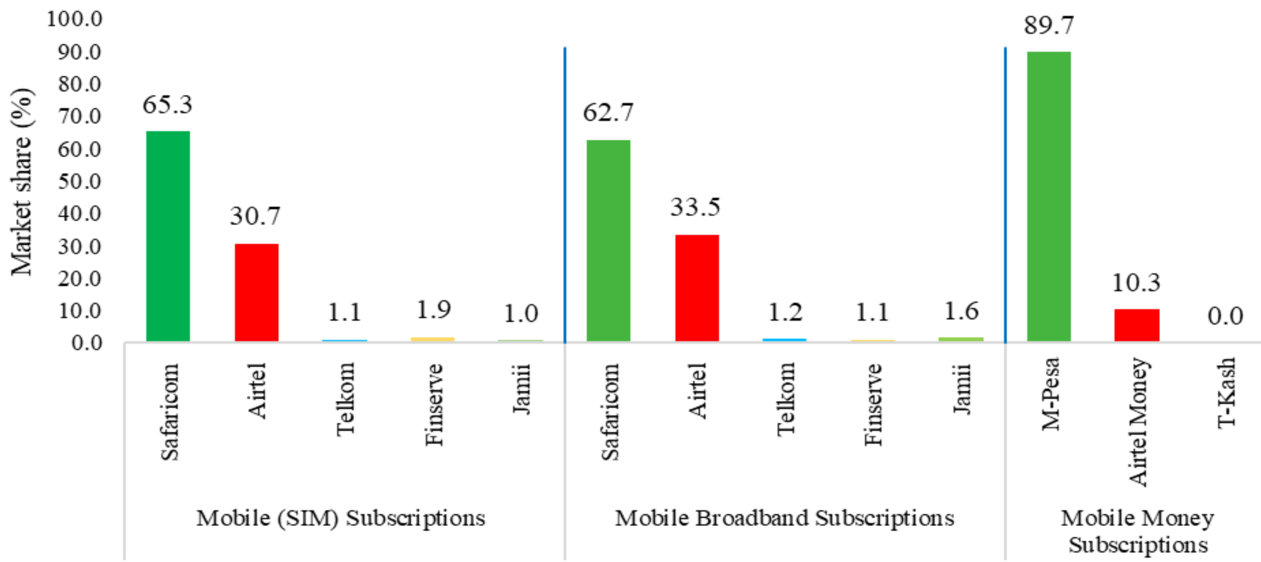


Source: CA, Operators', Provisional data for Telkom Kenya Limited

Figure 6: Mobile Broadband Consumption per Broadband Subscription

1.5 Market Shares in Subscriptions for Mobile Services

Safaricom PLC maintained the highest market shares across mobile subscriptions, mobile broadband and mobile money at 65.3, 62.7 and 89.7 per cent respectively. The market share in subscriptions for the respective mobile services is as shown in Figure 7.

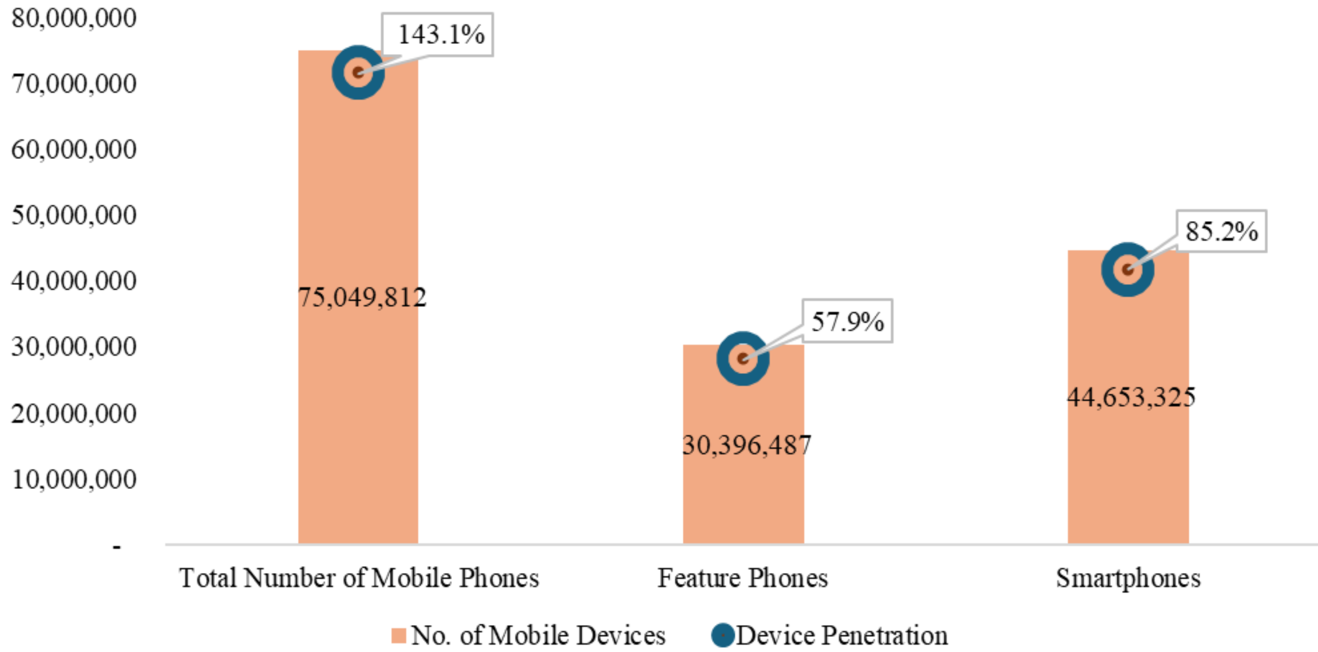


Source: CA, Operators', Provisional data for Telkom Kenya Limited

Figure 7: Mobile Market Shares

1.6 Mobile Phone Devices

By end of September 2025, the total mobile phones connected to mobile networks was 75.0 million, translating to a penetration rate of 143.1 per cent, out of which 59.5 per cent were smartphones. As shown in Figure 8, Smartphone and feature phone penetration rates stood at 85.2 per cent and 57.9 per cent, respectively, as illustrated in Figure 8.



Source: CA, Operators', Provisional data for Telkom Kenya Limited

Figure 8: Mobile Phone Devices

1.7 Domestic Mobile Voice and SMS Traffic

The total domestic voice minutes were recorded at 29.9 billion during the reference period compared to 29.1 billion minutes in the previous period. SMS traffic declined to 14.7 billion from 15.2 billion messages.

Table 2:Domestic Mobile Traffic per Operator

Name of Operator /Indicator			***Safaricom PLC***	***Airtel Networks Kenya Ltd***	***TKL***	***Finserve***	***JTL***	***Total***
Jul-Sep 25	***Voice***	***Total***	**18,316,579,253**	**11,552,353,371**	**34,794,970**	**16,498,401**	**14,468,803**	**29,934,694,798**
		On-net	16,880,590,881	8,168,248,806	17,336,927	1,261,505	950,834	25,068,388,953
		Off net	1,435,988,372	3,384,104,565	17,458,043	15,236,896	13,517,969	4,866,305,845
	SMS	***Total***	**13,354,713,314**	**1,300,836,455**	**3,869,044.00**	**3,024,049**	**503,217**	**14,662,946,079**
		On-net	12,463,946,878	720,258,329	66,301	1,146,210	62,012	13,185,479,730
		Off net	890,766,436	580,578,126	3,802,743	1,877,839	441,205	1,477,466,349
Apr-Jun 25	***Voice***	***Total***	**18,498,592,777**	**10,596,502,649**	**34,794,970**	**22,344,869**	**13,500,576**	**29,165,735,841**
		On-net	17,029,648,270	7,482,202,145	17,336,927	1,430,197	840,422	24,531,457,961
		Off net	1,468,944,507.00	3,114,300,504	17,458,043	20,914,672.00	12,660,154	4,634,277,880
	SMS	***Total***	**13,488,025,294**	**1,751,336,275**	**3,869,044.00**	**3,704,938**	**554,477**	**15,247,490,028**
		On-net	12,574,004,837	962,406,708	66,301	1,159,058	47,455	13,537,684,359
		Off net	914,020,457	788,929,567	3,802,743	2,545,880	507,022	1,709,805,669

Source: CA, Operators', Provisional data for Telkom Kenya Limited

1.8 Minutes of Use per Call per Operator

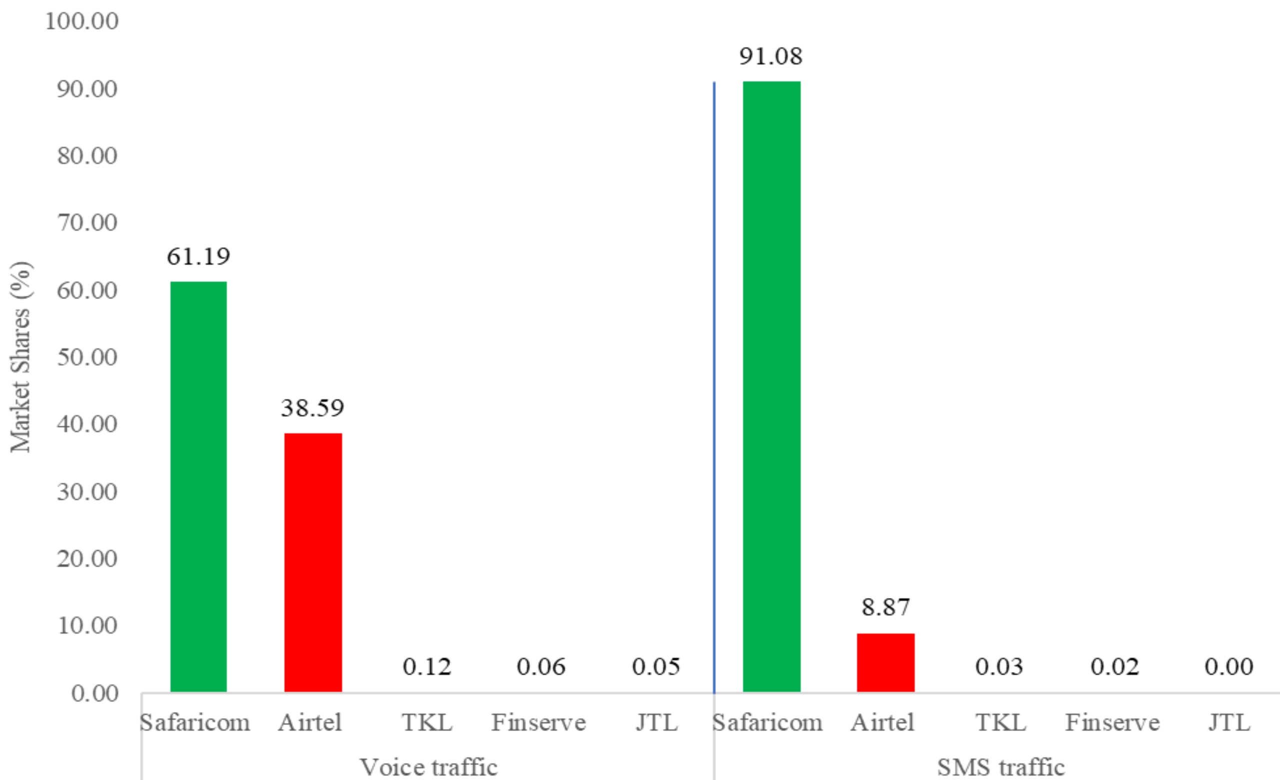
The average on-net and off-net call durations were recorded at 1.9 and 1.3 minutes, respectively, during the reference period. Airtel customers recorded the longest average on-net call duration at 3.1 minutes, while Jamii Telecom registered the longest average off-net call duration at 1.7 minutes.

Table 3: MoU per Call

Period	***Jul-Sep 25***		***Apr-Jun 25***	
Operator/Indicator	**On-net**	**Off net**	**On-net**	**Off net**
Total Average	**1.8**	**1.3**	**1.9**	**1.3**
Safaricom PLC	1.6	1.2	1.6	1.1
Airtel Networks Limited	2.8	1.3	3.1	1.5
Telkom Kenya Limited	2.7	1.2	2.7	1.2
Finserve (Equitel)	1.4	1.0	1.4	1.2
Jamii Telecommunications Ltd	1.4	1.7	1.4	1.7

Source: CA, Operators', Provisional data for Telkom Kenya Limited

1.9 Market shares in Domestic Mobile Voice and SMS Traffic



Source: CA, Operators', Provisional data for Telkom Kenya Limited

Figure 9: Market Shares in Domestic Mobile Voice and SMS

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

Minutes of Use per subscription per month increased to 127.5 from 126.5 minutes reported during the preceding quarter whereas short messages per subscription dropped to 62.4 from 66.3 messages as shown in Figure 10.

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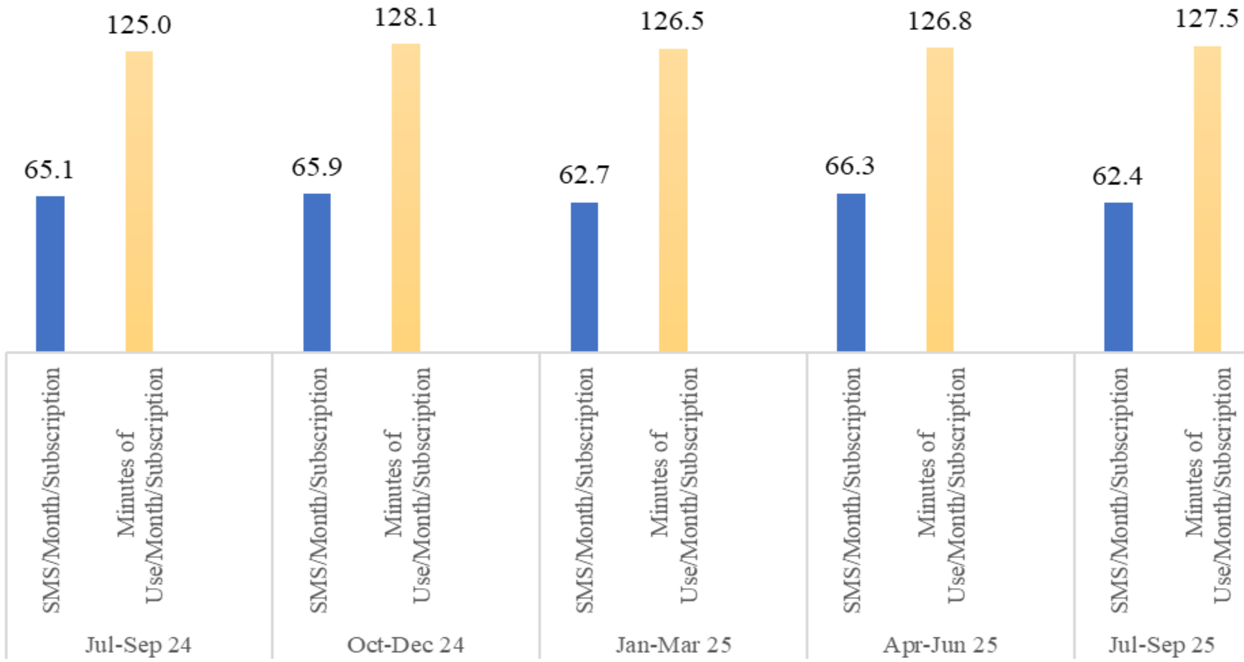


Source: CA, Operators' Returns, Provisional Data for Telkom Kenya Limited

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

1.11 International Mobile Traffic

International incoming mobile voice traffic declined by 0.7 per cent to 115.2 million, whereas outgoing traffic grew by 10.3 per cent to 220.9 million minutes. International incoming and outgoing SMS declined by 3.4 and 6.2 per cent to post 5.4 million and 2.5 million messages respectively. This decline is attributed to the increasing uptake of internet supported messaging services.

Table 4: International Mobile Traffic

Indicator/Period	*Region*	*Jul-Sep 25*	*Apr-Jun 25*	*Quarterly Variation (%)*
International Incoming Mobile Voice Minutes	*EAC*	115,277,355	114,450,361	0.7
	Others	50,832,468	52,749,521	-3.6
	Total	**166,109,823**	**167,199,882**	**-0.7**
International Outgoing Mobile Voice Minutes	*EAC*	179,316,050	153,699,087	16.7
	Others	41,595,940	46,570,614	-10.7
	Total	**220,911,990**	**200,269,701**	**10.3**
International Incoming Mobile SMS		5,442,624	5,631,540	-3.4
International Outgoing Mobile SMS		2,536,777	2,704,693	-6.2

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 first quarter of the FY 2025/26.

Table 5: Outbound Roaming Traffic

Country / Indicator	***Incoming Voice (Minutes)***	***Incoming SMS***	***Outgoing Voice (Minutes)***	***Outgoing SMS***	***Data Volumes (MB)***
Uganda	125,203,124	11,629	5,456,627	1,254,501	55,647,274
Tanzania	18,291,858	23,515,475	1,149,834	640,720	16,272,501
Rwanda	3,533,969	0	293692	81,396	5,010,123
Burundi	133,612	1,784,829	3,721	6,410	9,728
South Sudan	8,082,804	0	547678	163,579	1,056,177
Democratic Republic of Congo	4,333	121,458	153,553	19,210	4,110,178
EAC Total	**155,249,700**	**25,433,391**	**7,605,105**	**2,165,816**	**82,105,981**
Others	985,725	79,689,311	3,047,924	3,122,068	46,670,816
Total	**156,235,425**	**105,122,702**	**10,653,029**	**5,287,884**	**128,776,797**

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

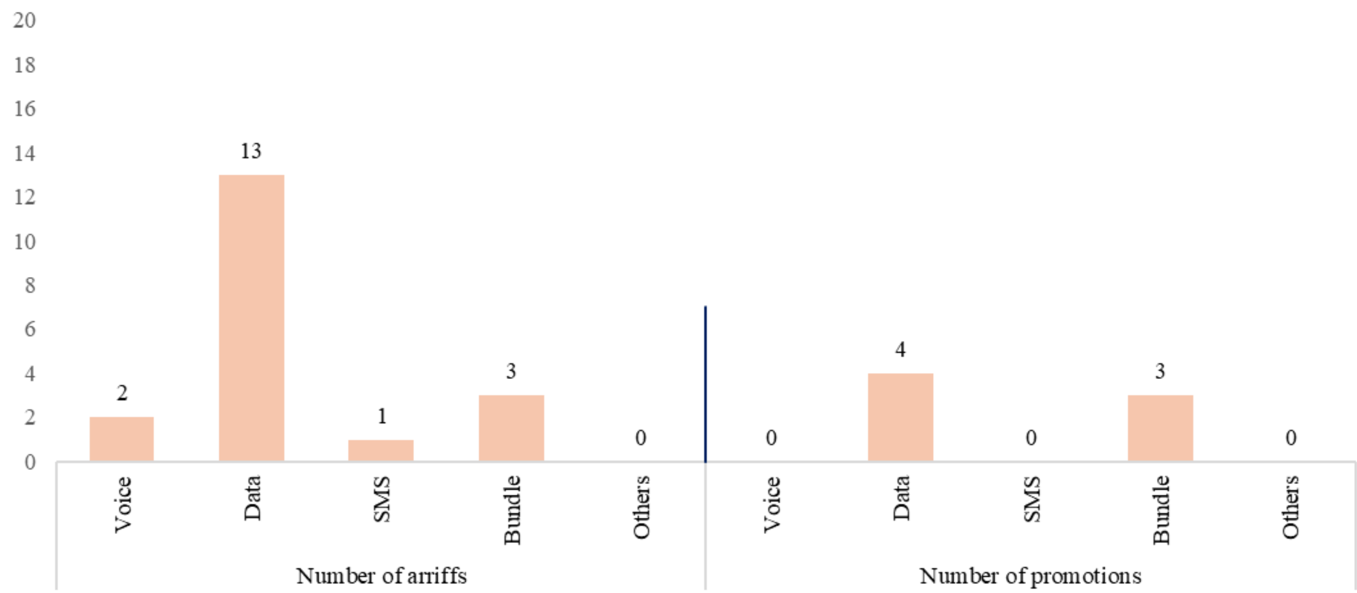
Table 6: In-bound Roaming Traffic

Country / Indicator	***Incoming Voice (Minutes)***	***Incoming SMS***	***Outgoing Voice (Minutes)***	***Outgoing SMS***	***Data Volumes (MB)***
Uganda	30,718,116	6,306,554	1,582,003	163,206	26,166,479
Tanzania	125,350,179	22,458,531	714,793	471,399	2,849,338
Rwanda	23,991,393	2872160	172,021	40,069	673,097
Burundi	1,197	2151	906	6,635	85
South Sudan	874,381	3,618,976	94,629	9,061	118,043
Democratic Republic of Congo	7,384	180,910	63,965	7,546	338,267
EAC Total	**180,942,650**	**35,439,282**	**2,628,317**	**697,916**	**30,145,309**
Others	941,720	36,276,873	1,825,749	1,769,551	891,864,843
Total	**181,884,370**	**71,716,155**	**4,454,066**	**2,467,467**	**922,010,152**

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

1.13 Tariffs, Promotions and Special Offers

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



Source: CA, tariffs, promotions and special offers

Figure 11: Distribution of Tariffs, Promotions and Special Offer

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

The average PAYG rates for voice, SMS, and data during the quarter were 3.49, 1.25 and 4.59 Kenyan shillings, respectively, as shown in Table 7.

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

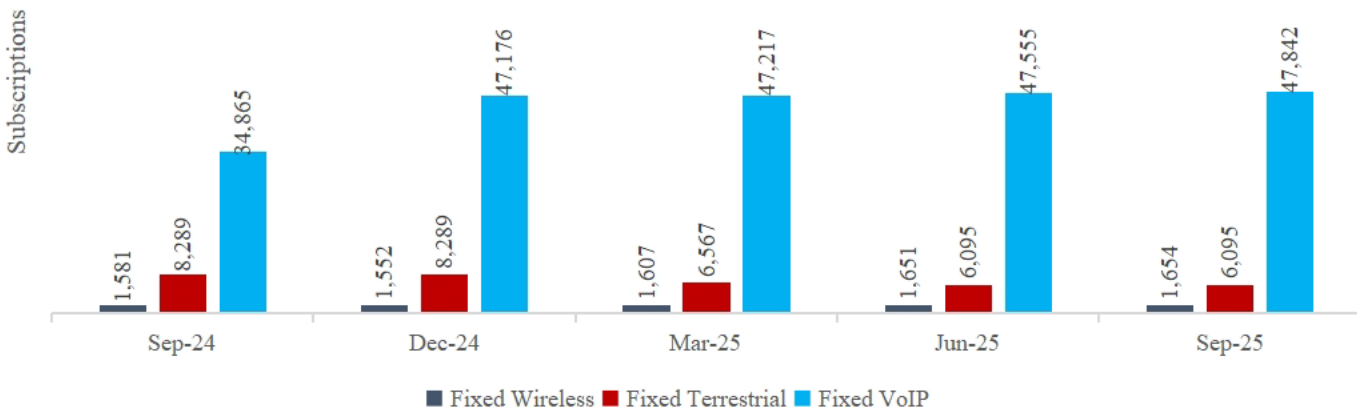
Operator/Market		*Average Voice (KES/Min)*	*SMS (KES/SMS)*	*Data (KES/MB)*
Safaricom PLC		4.00	1.50	4.87
Telkom Kenya Limited	On-net	2.73	1.15	4.50
	Off net	4.30	1.15	4.50
Airtel Network Limited		2.93	1.20	4.50
Average		**3.49**	**1.25**	**4.59**

Source: CA

2. FIXED NETWORK SERVICES

1.1 Fixed Telephone Subscriptions

Subscriptions to fixed wireless and fixed VoIP services grew from 1,651 to 1,654 and 47,555 to 47,842, respectively as of September 2025, as shown in Figure 12.



Source: CA, Operators' Returns, Provisional data for TKL

Figure 12: Fixed Voice Subscriptions

1.2 Domestic Fixed Voice Traffic

Overall, local fixed voice traffic grew by 1.4 per cent to post 1.12 million minutes during the quarter under review as illustrated in Table 8.

Table 8: Domestic Fixed Voice Traffic (Minutes)

Domestic Fixed Voice Traffic (Minutes)	*Jul-Sep 25*	*Apr-Jun 25*	*Quarterly Variation (%)*
Fixed-Fixed	89,868	89,868	0.0
Fixed Wireless-Fixed Wireless	330,381	315,263	4.8
Fixed to Mobile	705,984	705,984	0.0
Total Domestic Fixed Network Traffic	**1,126,233**	**1,111,115**	**1.4**

Source: CA, Operators' Returns, Provisional data for TKL

1.3 International Fixed Voice Traffic

International incoming fixed network voice traffic declined by 18.0 per cent to 4.1 million minutes, whereas outgoing traffic grew by 1.9 per cent to 890,675 during the reference period. International outgoing fixed VoIP traffic declined by 6.3 per cent to post 483,307 minutes as shown in Table 9.

Table 9: International Fixed Voice Traffic

Indicator/Period	Jul-Sep 25	Apr-Jun 25	Quarterly Variation (%)
International Incoming Fixed Network Voice traffic	4,132,477	5,042,602	-18.0
International Outgoing Fixed Network Voice traffic	890,675	874,473	1.9
International Outgoing Fixed VoIP traffic	483,307	515,682	-6.3

Source: CA, Operators' Returns, Provisional data for TKL

1.4 Fixed Data Subscriptions

Fixed data market was marked by growth in subscriptions across various technologies resulting in an overall growth of 6.9 per cent during the first quarter as shown in Table 10. Terrestrial wireless and satellite technologies recorded the highest growth in subscriptions of 10.2 per cent to post 795,020 and 19,762 subscriptions respectively.

Table 10: Fixed Internet Subscriptions by Technology

Indicator/Period	Sep 25	Jun 25	Quarterly Variation (%)
Total Wireless Subscriptions	**814,782**	**739,106**	**10.2**
Terrestrial Wireless	795,020	721,167	10.2
Satellite	19,762	17,939	10.2
Total Wired Subscriptions	**1,477,081**	**1,405,607**	**5.1**
DSL (Copper)	34	31	9.7
Fibre Optic	1,272,553	1,207,583	5.4
Cable Modem	196,462	196,486	0.0
Others (e.g. Radio)	8,032	7,812*	2.8
Total Data Subscriptions	**2,291,863**	**2,144,713**	**6.9**

*Source: CA, Operators' Returns, *Revised data, Provisional data for TKL*

1.5 Fixed Data and Broadband Subscriptions

In the first quarter, most data subscribers were subscribed to internet speeds between 10 and 30 Mbps, most of them being FTTH subscribers. The number of customers subscribed to data/internet speeds equal or greater than 1 Gbps declined from 701 recorded last quarter to 571 subscriptions, as shown in Table 11.

Table 11: Fixed Data and Broadband Subscriptions

Internet Technology/Speeds		<256Kbps	=>256Kbps < 2Mbps	=>2<10 Mbps	=>10<30 Mbps	=>30<100Mbps	=>100 Mbps <1Gbps	=>1Gbps
Sep 25	**Totals**	**36,411**	**61,281**	**771,811**	**960,538**	**272,409**	**188,842**	**571**
	Cable Modem	-	-	20,408	170,486	5,423	145	-
	Copper (DSL)	-	-	34	-	-	-	-
	FTTH	-	3,843	269,004	553,468	196,904	141,207	-
	FTTO	-	4,337	13,895	39,595	29,463	20,266	571
	Fixed Wireless	36,408	52,954	466,767	192,823	38,392	7,676	-
	Satellite	3	113	7	130	-	19,509	-
	Other Fixed	-	34	1,696	4,036	2,227	39	-
Jun 25	**Totals**	**35,114**	**49,790**	**717,853**	**873,903**	**282,562**	**184,790**	**701**
	Cable Modem	-	-	21,534	168,923	5,868	161	-

	Copper (DSL)	-	-	31	-	-	-	-
	FTTH	-	3,907	249,268	522,361	190,617	139,750	3
	FTTO	-	4,319	12,902	34,443	28,551	20,846	616
	Fixed Wireless	35,111	41,417	433,431	147,486	57,347	6,375	-
	Satellite	3	113	7	130	-	17,606	80
	Other Fixed	-	34	680	560	179	52	2

Source: CA, Operators' Returns, Provisional data for TKL

1.6 Top 10 Operators in Fixed Data/Internet Subscriptions

Safaricom PLC maintained lead in fixed data subscriptions market shares at 35.6 per cent with Jamii telecommunications Ltd and Wananchi Group Limited coming second and third with market shares of 20.4 per cent and 11.8 per cent, respectively.

Table 12 shows Fixed Data Subscriptions by Operator and the respective market shares.

Table 12: Fixed Data Subscriptions by Operator

Service Provider/Indicator	***Number of data subscriptions***	***Percentage Market share (%)***
Safaricom PLC	815,037	35.6
Jamii Telecommunications Ltd	466,458	20.4
Wananchi Group (Kenya) Limited*	270,320	11.8
Poa Internet Kenya Ltd	265,729	11.6
Ahadi Wireless Limited	181,719	7.9
Vilcom Network Limited	107,763	4.7
Mawingu Networks Ltd	84,099	3.7
Dimension Data Solutions East Africa Limited	19,860	0.9
Starlink Internet Services Kenya	19,470	0.8
Vijiji Connect Limited	17,285	0.8
Others	44,123	1.9

*Source: CA, Operators' Returns, * Includes Wananchi Group Ltd, Simbanet, and Wananchi Telecom Ltd, Provisional data for TKL*

1.7 International Bandwidth

The total available/lit international internet bandwidth capacity in the country remained unchanged during the reference period whereas utilized capacity grew by 2.8 per cent as shown in Table 14.

Table 13: International Internet Bandwidth (Gbps)

Indicator/ Period			***Jul-Sep 25***	***Apr-Jun 25***	***Annual Variation (%)***
Total Available (Lit/Equip) Bandwidth Capacity (Gbps)			**22,311.445**	**22,311.445**	**0.0**
Undersea Bandwidth Capacity	**SEACOM**		6,850.000	6,850.000	0.0
	TEAMS		4,063.000	4,063.000	0.0
	Telkom Kenya	***EASSY***	6,170.000	6,170.000	0.0
		Lion 2	810.000	810.000	0.0

		DARE 1	1,890.000	1,890.000	0.0
		PEACE	2,528.000	2,528.000	0.0
Satellite Bandwidth Capacity			0.445	0.445	0.0

Table 14: Total Utilized Bandwidth Capacity (Gbps)

Indicator/ Period	*Jul-Sep 25*		*Apr-Jun 25*		*Quarterly Variation (%)*
	Sold In Kenya	*Sold in other Countries*	*Sold In Kenya*	*Sold in other Countries*	
Undersea Bandwidth Capacity	11,112.061	2,953.820	10,735.000	2,953.820	2.8
Satellite Internet Capacity		0.445		0.445	0.0

Source: CA, Operators' Returns, Provisional data for TKL

3. POSTAL AND COURIER SERVICES

2.1 Postal Traffic

As shown in Table 15, domestic letters declined by 17.2 per cent, while international outgoing and incoming letters grew by 22.9 per cent and 13.6 per cent, respectively. Parcels, including small packets, sent domestically fell by 19.8 per cent. International outgoing parcels rose by 18.2 per cent due to automation undertaken by Postal Cooperation of Kenya to comply with its card issuance requirements.

Table 15 : Postal Items

Indicator/Period		*Jul-Sep 25*	*Apr-Jun 25*	*Quarterly Variation (%)*
Letters	Domestic	144,087	174,057	-17.2
	International Outgoing	21,019	17,106	22.9
	International Incoming	27,906	24,571	13.6
Parcels	Domestic	113,874	141,932	-19.8
	International Outgoing	15,396	13,020	18.2
	International Incoming	57,154	107,035	-46.6

Source: CA, Operators' Returns

2.2 Private Courier Traffic

During the quarter, letters and parcels sent both locally and internationally grew except for international incoming parcels that dropped by 28.5 per cent as shown in Table 16.

Table 16: Courier Items

Indicator/Period		*Jul-Sep 25*	*Apr-Jun 25**	*Quarterly Variation (%)*
Letters	Domestic	883,278	770,896	14.6
	International Outgoing	14,834	8,738	69.8
	International Incoming	33,061	32,040	3.2

Parcels	Domestic	3,438,959	3,365,968	2.2
	International Outgoing	27,619	24,809	11.3
	International Incoming	134,185	187,802	-28.5

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

4. BROADCASTING SERVICES

3.1 Subscription to Broadcasting Services

The total number of subscriptions for broadcasting services grew by 13.7 per cent to 1.68 million by the end of the reference period, as shown in Table 17.

Table 17: Broadcasting Subscriptions

Indicator/Period		***Sep-25***	***Jun-25***	***Quarterly Variation (%)***
DTT	Go TV	444,007	314,520	41.2
	Star Times	500,906	492,330	1.7
	Sub-Total	**944,913**	**806,850**	**17.1**
DTH	Azam	31,069	30,095	3.2
	MultiChoice (DSTV)	270,017	188,824	43.0
	Star Times	199,270	195,948	1.7
	Wananchi (Zuku)	186,248	187,839	-0.8
	Sub-Total	**686,604**	**602,706**	**13.9**
Cable	Cable One	1,281	1,316	-2.7
	CTN (MSA)	398	484	-17.8
	Wananchi (ZUKU)	44,593	64,212	-30.6
	Hirani	758	758	0.0
	Wadani Cable	95	95	0.0
	Sub-Total	**47,125**	**66,865**	**-29.5**
Total		**1,678,642**	**1,476,421**	**13.7**

Source: CA, Operators' Returns

5. FREQUENCY SPECTRUM MANAGEMENT

The number of microwave links assigned by the Authority to various operators for deployment declined from 10,311 to 9,994. Similarly, the number of FM sound broadcasting frequencies assigned decreased from 1,010 to 969, as shown in Table 18.

Table 18: Frequency Spectrum Management

Indicator/Period	***Jul-Sep 25***	***Apr-Jun 25***	***Quarterly Variation (%)***
Assigned Microwave Links for Deployment	9,994	10,311	-3.1
FM Sound Broadcasting Frequencies Assigned	969	1,010	-4.1

Source: CA,

6. ELECTRONIC TRANSACTIONS AND CYBER SPACE MANAGEMENT

5.1 Registered Domain Names

The total number of users registered under the .KE domain increased by 3.9 per cent, to 115,653 from 111,313 recorded in the previous quarter. Table 19 provides a breakdown of the various .KE sub-domains and their respective number of registered users as of September 30th, 2025.

Table 19:.KE Domains

SUB-DOMAIN	*USER*	*Number of Users*		
		Sep-25	*Jun-25*	*Quarterly Variation (%)*
Total		**115,653**	**111,313**	**3.9**
CO.KE	Companies	102,741	98,808	4.0
ME.KE	Second level	209	210	- 0.5
.KE	Personal Websites and E-mail	7,078	6,709	5.5
OR.KE	Non-Profit-Making Organizations	2,082	2,061	1.0
AC.KE	Institutions of Higher Education	1,420	1,386	2.5
SC.KE	Lower and Middle-Level Institutions	1,018	1,061	-4.1
GO.KE	Government Institutions	879	857	2.6
INFO.KE	Information	135	129	4.7
NE.KE	Personal Websites and E-mail	66	65	1.5
MOBI.KE	Mobile Content	25	27	-7.4

Source: Kenic

5.2 National Cyber Space Landscape

In the quarter, the National KE-CIRT/CC detected 842.3 million cyber threat events, 81.6 percent drop from the 4.6 billion threats detected in the previous quarter.

In response to the detected cyber threat events, the National KE-CIRT/CC issued 20.0 million advisories in the same period, a 15.5 per cent increase compared to the 17.3 million advisories that were issued during the previous quarter. This was attributed to regular updates of systems, implementation of organizational access controls, hardening the anti-virus and firewalls, patching vulnerable systems regularly, and utilizing multi-factor authentication and strong passwords.

Table 20: Cybersecurity Landscape

Indicator/Period	*Threats and Advisories*	*Jul-Sep 25*	*Apr-Jun 25*	*Quarterly Variation (%)*
Threats	Malware	31,676,444	47,397,554	-33.2
	Brute Force Attacks	18,811,738	20,947,973	-10.2
	Web Application Attacks	10,417,253	12,742,473	-18.2
	System Vulnerabilities	776,542,757	4,492,325,076	-82.7
	Mobile Application Attacks	76,891	189,004	-59.3
	DDOS	4,795,584	13,080,197	-63.3
	Total Cyber Threats	**842,320,667**	**4,586,682,277**	**-81.6**
Advisories	Malware	599,655	556,674	7.7

	Brute Force Attacks	1,652,692	1,486,534	11.2
	Web Application Attacks	9,357,296	7,014,981	33.4
	System Attacks	7,456,782	6,884,107	8.3
	Mobile Application Attacks	11,841	25,561	-53.7
	DDOS	872,888	1,301,192	-32.9
	Total Cyber Advisories	**19,951,154**	**17,269,049**	**15.5**

Source: National KE-CIRT/CC

CONCLUSION

During the first quarter of the 2025/26 Financial Year, the Kenyan ICT sector was marked by growth in mobile and fixed services. There was an increase in SIM penetration, device penetration, especially smartphones as well as mobile traffic. Mobile money continued to play a key role in driving financial inclusivity, especially amongst the unbanked. Further, mobile data, especially 4G remained to be fundamental in providing internet connectivity across the country. The postal and courier sub-sector experienced mixed trends with the designated postal operator recording decline in domestic letters and parcels whereas the private couriers reported growth in both items. Overall, the broadcasting sub-sector recorded growth in subscriptions mainly driven by digital terrestrial and direct-to-home services.