

ICASA Pricing Questionnaire for the Affordability Assessment Market Study

Questionnaire to Telecommunication Service Providers

Section A: Company Profile

Q1. Service Provider Name

Q2. What types of services are currently offered?

Type of Service	Tick the relevant (Multiple responses allowed)
Mobile Voice (post-paid/prepaid)	
Mobile Broadband	
Fixed Broadband/Fibre	
Fixed Voice	
Satellite Internet	
Wholesale Services	
Other	

Q3. What is your mobile geographic coverage?

Geographic coverage	Tick where applicable
National	
Provincial	
Metropolitan	
Rural Areas Only	

Q4. What is your fixed geographic coverage?

Geographic coverage	Tick where applicable
National	
Provincial	
Metropolitan	
Rural Areas Only	

Q5. Number of Active Subscriptions

Service	Active Subscriptions*
Mobile Voice (post-paid/prepaid)	
Mobile Broadband	
Fixed Broadband/Fibre	
Fixed Voice	
Satellite Internet	

**The Authority recognises that one customer may hold more than one service subscription; therefore, total subscriptions should not be interpreted as customer counts.*

Section B: Pricing Information

Q6. Which pricing principle(s) do you apply? (You may provide multiple responses.)

Pricing principle	Tick where applicable
Cost-based pricing	
Value-based pricing	
Demand-based pricing	
Marginal cost pricing	
Penetration pricing	
Other (specify)	

Q7. Current Retail Prices

Provide current prices of the products and services below, within the following categories:

1. Standard and promotional products/services
2. Prepaid and post-paid products/services

Mobile Voice

- Per-minute call rate (off-net/all-net)
- Daily bundle (24 hours)
- Weekly bundle
- Monthly bundle

Mobile Data – List your top five data bundles by consumption and number of subscriptions during the 12 months ending 30 September 2026.

#	Bundle Size	Price	Validity Period	Roll-over and Transfer Rules
1.				
2.				
3.				
4.				
5.				

Fixed Broadband Packages – List your top five line speeds by consumption and number of subscriptions during the 12 months ending 30 September 2026.

#	Line Speed	Monthly Price	Data Allocation (GB)	Fair Usage Policy (FUP) Rules
1.				
2.				
3.				

#	Line Speed	Monthly Price	Data Allocation (GB)	Fair Usage Policy (FUP) Rules
4.				
5.				

Q8. How often are retail prices reviewed?

- Monthly
- Quarterly
- Annually
- Randomly
- Other (specify)

Retail price review period	Tick where applicable
Monthly	
Quarterly	
Annually	
Randomly	
Other (specify)	

Q9. How have the retail prices of the products and services listed in Q7 above changed during the last three years? (Increased, decreased, or unchanged)

Year	2023	2024	2025
Percentage Change			
(Increased, decreased, or unchanged)			

Section C: Cost Drivers

This section helps identify affordability constraints.

Q10. Rank the following cost drivers according to their impact on pricing.

(1 = Lowest Impact, 5 = Highest Impact)

Cost Driver	Rating
Spectrum Costs	
Network Deployment	
Fibre Backhaul	
Energy Costs	
Site Security	
Taxes and Levies	
Regulatory Compliance*	
International Bandwidth	
Device Subsidies	

**This includes Universal Service Obligations.*

Q11. What percentage of operating expenditure is attributable to each of the following?

- Network deployment
- Energy
- Maintenance
- Staffing
- Regulatory compliance

Q12. What is the cost of carrying an additional gigabyte (GB) for 4G, 5G and fixed broadband.

Section D: Affordability Initiatives

Q13. Does your company offer products targeted at low-income consumers?

Yes	
No	

If yes:

Specify:

Type of Service	Please tick where applicable
Entry-level data bundles	
Social media bundles	
Educational bundles	
Community Wi-Fi	
Free content platforms	
Other (specify)	

Q14. What proportion of your subscriber base uses data bundles with each of the following validity periods?

Data Validity	Proportion (%)
Hourly	
Daily (24 hours)	
3-day	
Weekly	
Fortnightly	

Q15. Do you provide:

Initiative	Please tick where applicable
Zero-rated educational sites	
Zero-rated government services	
Free public Wi-Fi	
Community connectivity projects	
Device financing	
Other (specify)	

Section E: Competition and Market Structure

Q16. To what extent does competition affect your retail pricing decisions?

Initiative	Please tick where applicable
Very High	
High	
Moderate	
Low	
Very Low	

Q17. Which factors most limit further price reductions?

(Multiple responses allowed)

- Spectrum constraints
- Infrastructure costs
- Energy costs
- Regulatory obligations
- Low margins
- Limited economies of scale
- Rural deployment costs
- Other (Specify)

Section F: Rural Affordability

Q18. Is it more expensive to provide services in rural areas?

Yes	
No	

Q19. If yes, what is the estimated additional cost?

- Less than 10%
- 10%-25%
- 26%-50%
- More than 50%

Q20. What percentage of the additional cost is passed on to customers via pricing?

- Less than 10%
- 10%-25%
- 26%-50%
- More than 50%

Q21. Which challenges affect rural deployment?

- Power availability
- Backhaul limitations
- Security/vandalism
- Terrain
- Low population density
- Affordability constraints

Section G: Affordability Performance Indicators

Q22. In your view, what percentage of household income should consumers spend on telecommunications services for those services to be considered affordable? Please substantiate.

- Less than 2%
- 2%-5%
- 5%-10%
- More than 10%

Q23. Does your company monitor customer affordability indicators?

Yes	
No	

If yes, indicate which indicators:

- Customer spend as percentage of income
- Data consumption trends
- Churn due to pricing
- Bundle affordability analysis
- Other (specify)

Q24. Provide information on the percentage of customers who have taken airtime/data advance services in the last 3 years.

Year	2023	2024	2025
Percentage of Customers			

Q25. Provide information on the number of customers who utilised your products and services using loyalty reward programmes in the last 3 years

Year	2023	2024	2025
Number of Customers			

Q26. Provide information on the number of customer permanent disconnections due to non-payment over the past 3 years.

Section H: Future Policy and Regulatory Measures

Q27. Which interventions would most improve affordability?

Rank the following:

Intervention	Rank
Additional Spectrum Release	
Infrastructure Sharing	
Open Access Networks	
Tax Reductions	
Reduced Regulatory Fees	
Expanded Universal Service Funding	
Rural Connectivity Subsidies	
Energy Support Measures	

Q28. In your view, what can ICASA do to help you bridge the affordability gap?