Independent Communications Authority of South Africa

Strategic Plan
2025-30

Independent Communications Authority of South Africa

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Strategic Plan
2025-2030

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LIST OF ABBREVIATIONS AND ACRONYMS

4IR	Fourth Industrial Revolution
5G	Fifth Generation Cellular Network Technology
AI	Artificial Intelligence
ASMS	Automated Spectrum Management System
BBBEE	Broad-Based Black Economic Empowerment
CAP	Consumer Advisory Panel
CCC	Complaints and Compliance Committee
CPD	Continuous Professional Development
DOC	Department of Communications
DTPS	Department Of Telecommunications & Postal Services
DTT	Digital Terrestrial Television
DOA	Digital Object Architecture
ECA	Electronics Communications Act
EDRMS	Electronic Document Record Management System
EMF	Electric and Magnetic Fields
EVP	Employee Value Proposition
GDP	Gross Domestic Product
HDGs	Historically Disadvantaged Groups
ICASA	Independent Communications Authority of South Africa
ICT	Information and Communications Technology
IMT	International Mobile Telecommunications
IoTs	Internet of Things
IPTV	Internet Protocol Television
ITU	International Telecommunications Union
KCAAA	Karoo Central Astronomy Advantage Areas
MTEF	Medium-Term Expenditure Framework

MTN	Mobile Telecommunications Network
MUX 1	Multiplex 1
NATJOINTS	National Joint Operational and Intelligence Structure
NDP	National Development Plan
NPMS	Network Performance Monitoring System
NT	National Treasury
OTT	Over the top
PAJA	Promotion of Administrative Justice Act
S192	Section 192 of the South African Constitution
SABPP HR	South African Board or People Practices Human Resources
SANDF	South African National Defence Force
SADC	South African Development Community
SAPO	South African Post Office
SAPS	South African Police Service
SETA	Sector Education and Training Authority
SIPs	Strategic Integrated Projects
SKA	Square Kilometre Array
SLA	Service Level Agreement
SMMEs	Small, Medium and Micro Enterprises
SOC	State Owned Company
TV	Television
WRC	World Radiocommunication Conference
WOAN	Wireless Open Access Network
USAASA	Universal Service and Access Agency of South Africa

STATEMENT BY THE ACCOUNTING AUTHORITY

MOTHIBI G. RAMUSI

The future of telecommunications, broadcasting, and postal regulation has been shaped by rapid technological advances, digital convergence, e-commerce and shifting of consumer behaviour. As a result, the rollout of emerging technologies will require the Independent Communications Authority of South Africa (ICASA) to manage spectrum allocation efficiently, ensuring optimal use while balancing the needs of public and private sectors. With the expansion of smart and emerging networks, there will be a need for continuous quality-of-service oversight and infrastructure support, through regulations especially in advancing infrastructure expansion and service offerings in underprivileged, rural and underserved areas.

What has become important and strategic at this stage, is that next-generation technologies demand proactive regulatory frameworks to prepare for the next wave of connectivity. As telecommunications, broadcasting, online streaming, financial technology, and e-commerce converge, ICASA is required to adopt more unified regulatory frameworks to oversee cross-platform licensees and related service providers that are aligned to the Information and Communication Technology (ICT) sector.

ICASA recognises the role that is to be played by digital platforms. One of the regulatory priorities will be to find a balance between freedom of expression and the need to curb misinformation and harmful content on these platforms. A collaborative working model with other regulatory bodies that may have mandates that are cross-functional to those of ICASA will remain as an ongoing engagement between entities to act in a proactive manner on identified gaps or opportunities.

With increasing data usage and more sophisticated tracking methods, ICASA will ensure information security and network reliability to protect consumer rights and adopt and enforce regulations, where necessary, consistent with standards as resolved by the World Telecommunications Standardisation Assembly (WTSA) of the International Telecommunication Union (ITU) and other competent standards bodies.

All licensees and related stakeholders that are dealing with ICASA must implement appropriate security measures to safeguard their deployed infrastructure and networks to build consumers trust and confidence in the use of ICTs. The telecommunications, e-commerce and broadcasting infrastructure are integral to national security as they need to be managed through a developed framework.

It is well within ICASA's strategic and operational mandate to facilitate digitally enabled South Africa through regulations. In this regard, a greater emphasis will be placed on ensuring that licensees expand connectivity not only in urban and semi-urban areas but to underprivileged, rural and underserved communities, ensuring equitable access to digital services. This advancement of infrastructure will also ensure that affordable access to data and digital services is attained, as this will be essential in promoting inclusion and bridging the socio-economic digital divide that still exists in South Africa.

The strategic intent of ICASA will also be to improve regulatory efficiency, allowing real-time

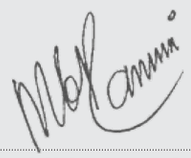
"The strategic intent of ICASA will also be to improve regulatory efficiency, allowing real-time monitoring of the licensee's network performance, enhanced spectrum management, and quicker response to non-compliance matters."

monitoring of the licensee's network performance, enhanced spectrum management, and quicker response to non-compliance matters. There is currently no policy pronouncement that governs Artificial Intelligence (AI) in South Africa; however, ICASA will be ready to oversee ethical standards in AI-driven services and content, ensuring fairness and transparency in AI applications within the ICT sector.

As climate change becomes a more prominent global issue, ICASA will further focus on regulatory matters that promote sustainability, requiring licensees and related service providers to adopt greener practices in their business models.

Licensees will be encouraged and, in some cases, mandated through license conditions to participate in socially responsible initiatives, especially in line with national socio-economic development goals. The future of the traditional postal sector continues to decline; therefore, ICASA will continue to support digitally transformed efforts, such as e-commerce and financial services, to ensure that the postal sector remains viable.

In conclusion, ICASA is geared to develop forward-thinking regulations that balance innovation with consumer protection, equitable access, inclusive infrastructure, and maintain economic stability. The evolution of a forward-thinking ICASA will demand agility, ongoing adaptation, change management and a very close collaboration with both internal and external stakeholders, government, and international bodies to ensure the regulatory environment remains effective, relevant and aiming for an impactful outcome.



Mothibi Ramusi
Chairperson

STATEMENT BY THE ACCOUNTING OFFICER

TSHIAMO MALULEKA-DISEMELO

The Authority's five-year Strategic Plan is grounded in national policy and legislation, providing a blueprint for effective ICT sector regulation to stimulate economic growth. This plan reflects the Authority's vision for expanding and modernising the ICT sector to make communications services, especially broadband, more affordable, and accessible to all South Africans. It outlines various measures to promote competition, reduce communication costs, ensure efficient use of the radio frequency spectrum, and enhance social cohesion in line with the Authority's constitutional mandate to oversee and regulate the broadcasting, telecommunications, and postal sectors in South Africa in the public interest, ensuring that our citizens benefit from accessible, diverse, and high-quality communications services. Notably, it also prioritises consumer welfare by ensuring robust protections for consumer rights. Our aim is to contribute meaningfully to the digital economy and to ensure South Africa's global competitiveness through inclusive and forward-looking regulatory practices.

Over the past fiscal year, the Authority focused on delivering outputs aligned with its regulatory mandate:

Access to Broadband Services Increased

- IMT roadmap
- Monitoring of spectrum auction social obligations

Status of Social Cohesion (Inclusive of Diversity of views)

- Review of Digital Migration Regulations
- Licencing of community sound broadcasting services

Rights of Consumers Protected

- Regulations on rapid deployment
- Quality of service

Competition in the ICT Sector Promoted

- Regulations on call termination
- Subscription TV market inquiry

Organisational Service Delivery Maintained

- Unqualified audit without findings
- Regulator of the future
- Funding model

The Authority's impact statement for the five-year planning period is outlined in this Strategic Plan 2025- 2030, guided by the change agenda (National Development Plan 2030 and the Medium-Term Development Plan 2024/29), the Authority's constitutional and legislative mandates (sustained agenda).

The outcomes below will guide the Authority's work over the Medium-Term Strategic Framework period 2025- 2030:

- Access to Broadband Servies Increased
- Social Cohesion and Nation-Building Enhanced
- Rights of Consumers Protected
- Skills Produced for the Economy by ICASA
- Competition in the ICT sector promoted.

Tshiamo Maluleka-Disemelo
Chief Executive Officer

OFFICIAL SIGN-OFF

It is hereby certified that this Strategic Plan:

was developed by the management of the Independent Communications Authority of South Africa under the guidance of its Council and considers all the relevant policies, legislation and other mandates for which the Independent Communications Authority of South Africa is responsible, accurately reflects the Impact, Outcomes and Outputs which the Independent Communications Authority of South Africa will endeavour to achieve over the period covered by the plan.

pp

Julia Kenyane

Programme 1: Administration -
Sub-Programme: Corporate Services

Mogomotsi Mokoka

Programme 1: Administration -
Sub-Programme: Information Technology

Lazarous Mkhabela

Programme 1: Administration -
Sub-Programme: Finance

Zakhele Kganakga

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Sub-Programme: Human Resources

pp

Boitumelo Gumbu

Programme 1: Administration -
Sub-Programme: Internal Audit

Ndivhuo Rabuli

Programme 1: Administration -
Sub-Programme: Legal Risk & Complaints and Compliance Committee

Fikile Hlongwane

Programme 2: Licensing & Compliance

Norman Gidi

Programme 3: Policy Research and Analysis

Philemon Molefe

Programme 4: Engineering and Technology

Siyanda Nkamisa (Acting)

Programme 5: Regions and Consumer Affairs

David Molapo

Senior Manager: Strategy & Programme Management

Tshiamo Maluleka - Disemelo

Accounting Officer

Mothibi Ramusi

Chairperson

PART A
OUR MANDATE

The mandate of the Independent Communications Authority of South Africa (the Authority) is derived from the Constitution of the Republic of South Africa. It is elaborated in the Authority's founding legislation and informed by the policies of the government of the day.

1. CONSTITUTIONAL MANDATE

The Authority derives its mandate from section 192 of the Constitution of the Republic of South Africa, 1996. Section 192 states that national legislation must establish an independent authority to regulate broadcasting in the public interest and ensure fairness and diversity of views broadly representing South African society.

2. LEGISLATIVE AND POLICY MANDATES

The Authority's constitutional mandate is given effect by the Authority's legislative mandate (sustained agenda) and government policy (change agenda) outlined below.

2.1 LEGISLATIVE MANDATES

The Authority's full mandate is a compendium of several legislations which cover a spectrum of sustaining issues within the country.

THE CONSTITUTION OF THE REPUBLIC OF SOUTH AFRICA, 1996

Section 192: National legislation must establish an independent authority to regulate broadcasting in the public interest, and to ensure fairness and a diversity of views broadly representing South African society.

THE INDEPENDENT COMMUNICATIONS AUTHORITY OF SOUTH AFRICA ACT NO. 13 OF 2000, AS AMENDED (ICASA ACT)

The ICASA Act establishes the Authority as an independent regulator and provides that it must, amongst others: a) perform its functions through Council as contemplated in section 5; b) be independent and subject only to the Constitution and the law; c) be impartial and perform its functions without fear or favour; d) act in a manner that is consistent with the obligations of the Republic under any applicable international agreement, according to section 231 of the Constitution; and e) conclude concurrent jurisdiction agreements with any regulator in respect of areas of regulatory overlaps.

THE BROADCASTING ACT NO. 4 OF 1999 (THE BROADCASTING ACT)

The Act clarifies the powers of the Minister and the Authority respectively and provides for the regulation of broadcasting activities in the public interest.

THE ELECTRONIC COMMUNICATIONS ACT NO. 36 OF 2005, AS AMENDED (THE ECA)

The ECA provides the legal framework for convergence of the telecommunications, broadcasting and information technology services. More importantly, it also sets out the Authority's regulations for the electronic communications and broadcasting sectors. The Authority has concurrent regulatory oversight/jurisdiction with the Competition Commission on competition matters in terms of Chapter 10 of the ECA read with 4B(8)(b) of the ICASA Act.

THE POSTAL SERVICES ACT, NO. 124 OF 1998

The Postal Services Act requires the Authority to licence and monitor the postal services sector and the South African Post Office (SAPO) in relation to minimum service standards and the fulfilment of universal service obligations, including the roll-out of street addresses and the provision of retail postal services in underserviced areas.

THE PROMOTION OF ADMINISTRATION JUSTICE ACT, NO. 3 OF 2000 (PAJA)

PAJA gives effect to the right to administrative action that is lawful, reasonable and procedurally fair and to the right to written reasons for administrative action, as contemplated in section 33 of the Constitution. As a constitutional body exercising public power and performing public functions, the Authority is subject to PAJA.

ELECTRONIC COMMUNICATIONS AND TRANSACTIONS ACT, 2002 (ACT NO.25 OF 2002) (ECTA)

The Electronic Communications and Transactions Act provides for the facilitation and regulation of electronic communications and transactions. It provides for the development of a national e-strategy for the Republic, the promotion of universal access to electronic communications and transactions, and the use of electronic transactions by SMMEs. The legislation further provides for human resource development in the electronic transactions sector, aims to prevent the abuse of information systems, and encourages the use of e-government services.

The Authority is enjoined in terms of section 4(3)(o) of the ICASA Act, to make recommendations to the Minister on matters dealt with or to be dealt with under the ECTA.

ASTRONOMY GEOGRAPHIC ADVANTAGE ACT, 2007 (ACT NO.21 OF 2007)

Sections 22 and 23 of the Act apply to the Authority. The Act requires that the Authority protects the Square Kilometre Array (SKA) radio telescope and associated radio telescopes from harmful radio frequency interference.

THE PROTECTION OF PERSONAL INFORMATION ACT, NO. 4 OF 2013 (POPIA)

POPIA aims to give effect to the application to the constitutional right to privacy. The POPIA has a profound impact in the way ICASA is collecting, storing or archiving, sharing, retaining and destroying the personal information of its Data Subjects. The Act seek to balance the legitimate needs of the ICASA to collect and use personal information for its business and strategic purposes against the right of individuals (Data Subjects) to their privacy.

2.2 POLICY MANDATES

In addition to the legislative mandates, the communication plans and policies below guide the Authority and South African institutions in the delivery of quality communication services.

- The National Treasury Economic Policy Paper, 2019
- South Africa Connect - Broadband Policy, published in 2013.
- Broadcasting Digital Migration Policy, published in 2008 and amended in 2012 and 2015
- National Integrated ICT White Paper Policy (2016)
- Draft White Paper on Audio and Audiovisual Media Services and Online Content Safety (2023)
- South Africa Artificial Intelligence Policy Framework (2024)
- National Data and Cloud Policy (2024)
- The Next Generation Radio Frequency Spectrum Policy for Economic Development (2024)
- Broadband and Digital Skills Programme (2024)

3. INSTITUTIONAL POLICIES AND STRATEGIES GOVERNING THE FIVE-YEAR PLANNING PERIOD

Over the five-year planning period, the Authority will continue to contribute to the national effort to implement the National Development Plan 2030.

3.1 THE NATIONAL DEVELOPMENT PLAN 2030

The National Development Plan 2030 describes a better future state for South Africans and outlines what each sector of the South African economy must do to ensure that the future becomes a reality. It states that by 2030:

a) "By 2030, ICT will underpin the development of a dynamic and connected information society and a vibrant knowledge economy that is more inclusive and prosperous. A seamless information infrastructure will be universally available and accessible and will meet the needs of citizens, business and the public sector, providing access to the creation and consumption of a wide range of converged services required for effective economic and social participation – at a cost and quality at least equal to South Africa's main peers and competitors."
b) Eliminate income poverty – Reduce the proportion of households with a monthly income below R419 per person (in 2009 prices) from 39 percent to zero.
c) Reduce inequality – The Gini coefficient should fall from 0.69 to 0.6

The Plan outlines several milestones across all sectors of the economy which must be realised to achieve the above-mentioned envisioned state.

In terms of the communications sector contribution, Chapter 4 of the Plan outlines the role the regulators must play towards the realisation of the future that is encapsulated in the two statements above. It states that:

The role and effectiveness of sector regulators needs to be reviewed. In addition to issuing licences and setting tariffs, regulators need to place more emphasis on stimulating market competition and promoting affordable access to quality services. This will require capacity-building in regulatory institutions.

The Plan sets out time horizons for achieving different milestones cumulatively up to 2030 in the communications sector at large.

SHORT-TERM 2012 – 2015

The following policy issues required attention: Adjust market structures and remove legal constraints to enable full competition in services. Develop a strategy for the local loop to ensure that quality improves; costs are reduced and fixed-line coverage is expanded to meet the demand for high-speed telecommunications.

Ensure that regulatory agencies have the resources to encourage market entry and fair competition and address market failure.

Implement a service- and technology-neutral licensing regime to allow for flexible use of resources, especially for spectrum that is urgently needed for next-generation services. Make spectrum available on a "use it or lose it" basis to encourage efficient use, drive down costs and stimulate innovation. Spectrum allocation should accompany set obligations to overcome historical inequalities in the ICT sector. However, these obligations should not delay the competitive allocation of this resource. Ensure access to low-cost, high-speed international bandwidth with open-access policies. Facilitate the development of high-bandwidth backbone networks.

Assess state-owned enterprise and municipal performance in ICT provision and decide on the future role and configuration of the state's family of ICT enterprises (Broadband InfraCo, Sentech and Telkom).

Examine the market's ability to sustain infrastructure competition and whether the benefits of this outweigh the problems of duplication of facilities in a resource-constrained environment. Identify alternatives to infrastructure competition through

structural separation of the national backbone from the services offered by Telkom to create a common carrier that offers open access to service competitors. Similarly, encourage or prescribe sharing of expensive trenching infrastructure by creating common rights of way for competing operators to lay dedicated lines.

MEDIUM-TERM 2015 – 2020

Between 2015 and 2020, the following goals were pursued: Extend broadband penetration. The Planning Commission supports the Department of Communications' proposed target of 100 percent broadband penetration by 2020. All schools, health facilities and similar social institutions should be connected, and individual citizens should have affordable access to information services and voice communication at appropriate locations. Broadband is currently defined as a minimum connection speed of 256 kilobytes per second, but by 2020, this will probably be at least two megabytes per second, with some countries aiming for 100 megabytes per second. South Africa's goals should be to remain competitive rather than to set firm numerical targets.

Benchmark South Africa's performance against other countries. It is suggested that by 2020, strategic investment and regulatory guidance will result in the costs associated with internet access falling to match South Africa's peers. More generally, South Africa should aim to position itself in the top quartile of the International Telecommunications Union's ICT Development Index ranking of middle-income countries. It should also aim to regain its position as the continent's leader in both quality and cost of ICT services.

LONG TERM: 2020–2030

By 2030, the government will make extensive use of ICT to engage with and provide services to citizens. All South Africans will be able to use core ICT services and enjoy access to a wide range of entertainment, information and educational services. The e-strategy collaborations between the state, industry and academia will stimulate research and innovation and promote local content production and multimedia hub establishment. These systems will be used to interact with the global ICT ecosystem, of which South Africa will be an integral part.

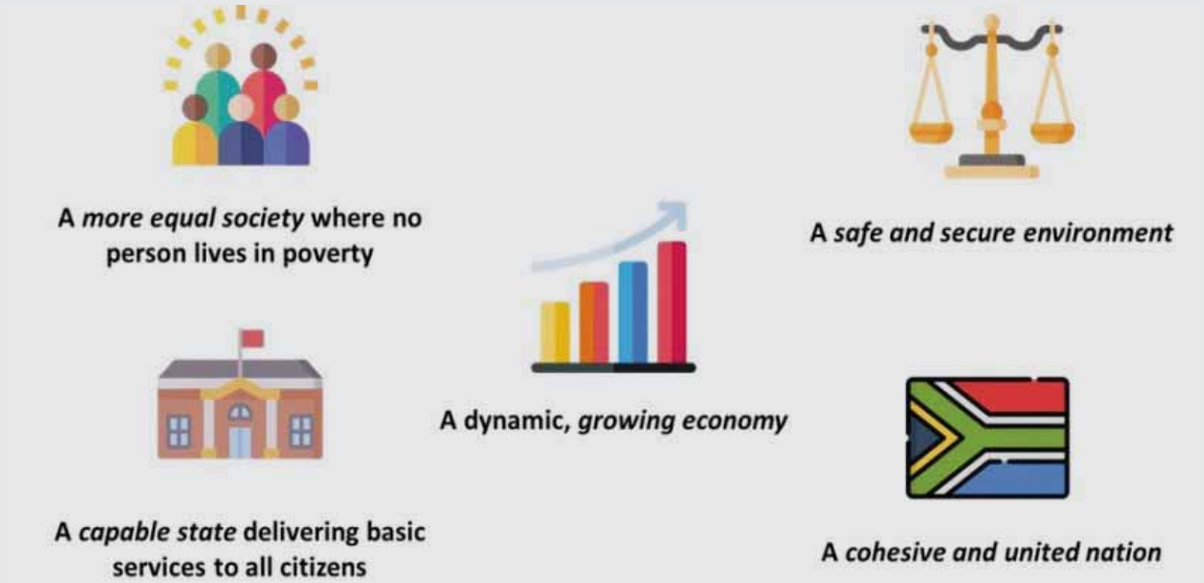
Therefore, while the Authority's work will be aligned to the work of government through Chapter 4 of the Plan, it will also still be a continuation of any aspects that the Authority may have not completed from the 2012-2015 short-term period, the 2015-2020 medium-term period and the current 2020 – 2030 long-term period that it is embarking upon with its planning effort.

3.2 THE MEDIUM-TERM DEVELOPMENT PLAN

The Medium-Term Development Plan (MTDP) is the government's 5-year strategic plan formerly known as the Medium-Term Strategic Framework (MTSF). It follows the political cycle. Thus, it contains the intentions and priorities of the political party incoming into government administration.

The MTDP is normally developed after an end-term evaluation of the past five years' MTDP. The last MTDP (MTSF) was for the political cycle 2019–24. Thus, the MTDP for the 7th Administration is for the political cycle 2024-29 or colloquially, MTDP 2024–29.

The MTDP 2024–2029 aligns with the goals and objectives of the NDP2030 and the minimum programme of priorities of the GNU. The NDP2030 remains South Africa's long-term country plan towards 2030 and is aligned with its international commitments on the continent and globally. The MTDP 2024–2029 sets out five goals for the next five years. These are intended to guide the actions of government in pursuing the goals of the NDP.



Source: Presidency, 2024

Figure 1: MTDP 2024-29 Goals

The MTDP 2024-29 is unique in a sense that it is the first medium-term strategic framework that is not based solely on the manifesto of the African National Congress (ANC). It is a product of the Government of National Unity (GNU). Thus, it is informed by the statement of intent from the coalition of political parties that form the GNU.

The MTDP 2024–29 has three strategic priorities that all government institutions must be aligned with over the medium-term period, broken down into specific outcomes that the outputs of the government institutions must contribute to for the realisation of the long-term goals in the NDP 2030:

- Strategic Priority 1: Inclusive growth and job creation
- Strategic Priority 2: Reduce Poverty and tackle the high cost of living
- Strategic Priority 3: A capable, ethical and developmental state

The Authority will contribute to the national outcomes below over the MTDP 2024-29 period:

Table 1: MTDP 2024-29 Strategic Priorities ICASA Contributes To

MTDP 2024 – 29 PRIORITIES		
Strategic Priority 1: Inclusive growth and job creation	**Strategic Priority 2:** Reduce Poverty and tackle the high cost of living	**Strategic Priority 3:** A capable, ethical and developmental state
NATIONAL OUTCOMES		
Outcome: Science, technology and innovation for growth • Invest in digital identity and payments, expand access to affordable broadband, and increase training for young people in digital skills.	**Outcome:** Social Cohesion and National Building • Promote and protect South Africa's diverse languages and cultures. • Promote the rights of women, youth, children and persons with disabilities and remove the social, economic, cultural and other barriers to full participation in the economy	**Outcome:** Effective border management and development in Africa • Promote peace, security, democracy and socioeconomic development in SADC and other parts of the continent. Strengthen the AU Peace and Security and Governance architecture. • Increase the voice of developing countries in the UN and other multilateral institutions, promoting peace, security and development, South-South and North-South cooperation through BRICS, the G20, the Non-Aligned Movement and other forums.
Outcome: Increased infrastructure investment and job creation • Invest in infrastructure development in key sectors of energy, communications, water and transport infrastructure, and focus on underserviced areas.	**Outcome:** Economic transformation and equitable inclusion of women, youth and persons with disabilities (WYPD) for a just society	

3.3 THE DISTRICT DEVELOPMENT MODEL

In 2019, the 6th Administration adopted a new approach to fast-track service delivery and development across South Africa called the Khawuleza joined-up District Development Model. The President is the champion of the model supported by the Deputy President and Minister in the Presidency. The Minister of COGTA and the Department of Cooperative Governance is responsible for coordinating implementation in line with their mandate of 'cooperative governance'.

The model seeks to breakdown silos horizontally across various sectors and vertically across the three spheres of government by using district spaces as locus of coordination and integration of development efforts.

The focus on implementation in the MTDP 2024-29 requires all three spheres of government to work collaboratively through the District Development Model (DDM) approach.

The DDM bridges the gap between the three spheres of government to ensure better coordination, coherence and integration of government planning and interventions and, therefore, also brings the government closer to the people.

The Authority does not run specific projects on the ground. However, it carries out compliance, enforcement and quality of service tests across all the nine provinces in the country. It will continue to play its role in implementing DDM by choosing district municipalities in which it will carry out quality of service monitoring. Focus will be on the district municipalities that are in the Minister of Communications and Digital Technologies service delivery agreement with the President, Lejweleputswa and Ruth Mompati Municipalities.

3.4 STATE OF THE NATION ADDRESS 2025

When delivering the State of the Nation Address 2025, the President stated several initiatives which the government will implement over the medium-term period, to which the Authority will play its role to ensure it makes a positive contribution. The President said:

> That is why our focus is on empowering black people, women and persons with disabilities because they were deliberately excluded from playing a key role in the economy of their own country. We will fast-track the regulations of the Public Procurement Act to ensure businesses owned by women, youth and persons with disabilities receive equitable opportunities in government contracts.
>
> We will continue to provide training to women entrepreneurs to enable them to compete for government tenders. In November last year, we launched the National Skills Fund Disabilities Programme. In its first phase, this transformative initiative will empower over 10,000 persons with disabilities through tailored training programmes, stipends and specialised tools. This part of the work we must undertake as business, government, labour and civil society to enable persons with disabilities to play an important part in the economy of our country.
>
> This part of the work we must undertake as business, government, labour and civil society to enable persons with disabilities to play an important part in the economy of our country.

Therefore, the Authority will contribute as part of government as a constitutional institution and a communications regulator.

3.5 MINISTER OF COMMUNICATIONS AND DIGITAL TECHNOLOGIES SPEECH EXCEPTS

Addressing an audience at the South Africa's Communications & Digital Technology Infrastructure Roadmap, 28-31 October 2024, the Minister outlined key areas that are vital to the country's roadmap in the communications and digital technologies sector in South Africa.

THE IMPORTANCE OF THE DIGITAL TRANSFORMATION OF THE ECONOMY AND SOCIETY

The digitalization agenda has an enormous role to play by way of contribution to South Africa's digital economy.

WHERE WE ARE AND THE PRIORITIES OF THE CURRENT ADMINISTRATION (2024- 2029)

1) Ensuring universal access to the internet,
2) Empowering people with digital skills for a digital economy and society,
3) Enabling productive use of digital technologies, and
4) Creating a supportive environment for digital investment and innovation.

UNIVERSAL ACCESS TO THE INTERNET

To achieve true universal connectivity, our strategy has been built on three key layers, namely:

- International connectivity through submarine cables
- National connectivity through terrestrial cables
- And last mile connectivity through a combination of fixed and wireless solutions.

NATIONAL CONNECTIVITY: EXPANDING HIGH-SPEED TERRESTRIAL NETWORKS

Our goal is to connect every corner of South Africa, ensuring that all citizens, regardless of location, have access to reliable and high-speed internet.

LAST MILE CONNECTIVITY: BRIDGING THE DIGITAL DIVIDE

To complete the broadband ecosystem, we must ensure last mile connectivity – bringing internet services directly to end-users, particularly in remote, rural, and underserved urban areas.

HARDWARE

Affordable data and smart devices are also critical for achieving internet access and usage targets.

DIGITAL SKILLS FOR A DIGITAL ECONOMY AND SOCIETY

Through targeted digital skills programs, we aim to empower citizens, especially the youth, to actively participate in the digital economy, whether as employees, entrepreneurs, or innovators.

DIGITAL PUBLIC INFRASTRUCTURE

The Presidency has established an interdepartmental working group to develop a comprehensive strategy and implementation roadmap for developing South Africa's digital public infrastructure, focusing on the three pillars of digital identity systems, digital payments systems, and data exchange systems.

DATA CENTRES

Digital services will, and already are, significantly driving the demand for data centres, primarily due to the growing need to store, process, and analyse vast amounts of data. Over the past few years, the country has witnessed substantial investment in data centres, with local and international players establishing a strong presence. South Africa is positioning itself as a leading hub for data centre infrastructure in Africa, driven by growing demand for cloud services, digital platforms, and big data analytics.

DATA AND CLOUD POLICY

Our policy is focused on ensuring compliance with data sovereignty and cybersecurity regulations and encouraging investments in renewable energy to power these facilities, in line with our national sustainability goals.

SPECTRUM POLICY

The regulatory authority managed to license more than 300 MHz of the coveted spectrum, unleashing innovation and competition in the sector. I have been informed by the regulatory authority that they have initiated the process of licensing the next round of IMT spectrum.

NATIONAL AI POLICY FRAMEWORK

Provides a comprehensive approach to harnessing AI for economic growth and social development, while also addressing ethical concerns.

4. RELEVANT COURT RULINGS

The Authority's posture towards its work is to ensure that it always operates within the bounds of the law. Its posture is also to guard against any attempt by anyone to undermine its independence and execution of its mandate which it must always do in the public interest. Over the past five years, the Authority dealt with several litigations which are documented below, and which may impact its operations and service delivery obligations

INTERPRETATION OF SECTION 19 (2) OF THE ELECTRONIC COMMUNICATIONS ACT

On 8 September 2022 the Authority received an urgent review application from Open Heaven Community Radio seeking relief that, the Respondent be interdicted and restrained from interfering with broadcasting services of the applicant, including seizing its broadcasting/ electronic equipment or interfering with its allocated broadcasting spectrum, pending finalisation of Part B of this application. After hearing the urgent application, the Court dismissed the application on the basis that there was no urgency.

Under Part B of the review application, the Court indicated that the Authority has an implied legislative power to consider condonation applications for non-compliance with time limits stipulated in section 19(2) of the ECA. The Authority filed an application for leave to appeal the judgment and Open Heaven also filed a cross appeal.

The matter is before the Appeal Court. This means that the order of court is suspended until the Appeal is heard and Appeal Order is issued.

AMENDMENT OF THE NATIONAL AND PROVINCIAL PARTY ELECTION BROADCAST AND POLITICAL ADVERTISEMENT REGULATIONS

On 19 March 2024, Authority received an urgent review application, filed by the Democratic Alliance DA wherein the DA seeks an order declaring that regulation 4(2) of the National and Provincial Party Election Broadcast and Political Advertisement Regulations, be set aside and the amended Regulation 4(2) is to be read as it stood prior to the amendment.

On 30 March 2024, judgment was delivered against the Authority in terms of which the amended regulation 4(2) of the National and Provincial Party Election Broadcast and Political Party Regulations was set aside and the old version of the regulation was reinstated.

CONTRAVENTION OF SECTION 43 OF THE ECA: FACILITIES LEASING REGULATIONS

On 18 May 2023, Metro Fibre Networx (Pty) Ltd ("MFN") filed a review application seeking to set aside the judgment and recommendations of the CCC as well as the decision of the Authority that MFN contravened section 43 of the ECA read with regulation 3 of the Electronic Communications Facilities Leasing Regulations in that it gained access to Telkom's electronic communications facilities without following the prescribed procedures.

In the CCC judgement, MFN was directed to desist from contravening section 43 of the ECA and from continuing installing its optic fibre on Telkom's infrastructure. Further, MFN was directed to submit a request to Telkom to lease the electronic communications facilities in terms of section 43 of the ECA.

The matter was heard on 16 August 2024 and the Court ordered in favour of the Authority and agreed with the interpretation by CCC of the provision of section 43 read with regulations of the Facilities Leasing Regulations. MFN has filed an application for leave to appeal to the court judgement.

THE CODE FOR PERSONS WITH DISABILITIES REGULATIONS 2021

On 07 October 2021, the Authority received a new review application from National Council of and for Persons with Disabilities (NCPD) in terms of which the following order is sought: (1) Reviewing and setting aside the decision of the Authority to make

and publish the Code for Persons with Disabilities Regulations 2021, government notice 325 which was published in the Government Gazette on 9 April 2021 ("the Code"); (2) Remitting the decision back to the Authority and directing the Authority to draft and the Code taking into account the NCPD's submission; (3) The Authority is directed to pay the applicant's costs and (4) Granting further and/or alternative relief. Judgement was delivered on 22 February 2024, in favour of ICASA. The Application was dismissed, however, there was no cost order issued against NCDP.

The Applicant has filed leave to Appeal the Judgement on 14 March 2024. The Judgement is suspended until the finalizing of the Appeal process.

TRADEMARK INFRINGEMENT

On 22 May 2024, the Authority lodged an application for a determination order with the Companies Tribunal against ICASAsePush. The Authority submitted that the name ICASAsePush does not satisfy the requirements of section 11(2) of the Companies Act, 2008, as such the Authority objected to the reservation of the name ICASAsePush with the Companies and Intellectual Property Commission. The name ICASAsePush falsely implies or suggests that or would mislead the public to incorrectly believe that ICASAsePush is an organ of state or is associated with the Authority. The application was granted and CIPC was ordered to cancel the reservation of the name.

FAILURE TO RENEW THE LICENSE AS PRESCRIBED

On 10 July 2024, the Authority received an urgent application in terms of which Zone Online Radio CC made an application to the High Court, in terms of which the Authority is interdicted from taking any steps to terminate its broadcasts until the determination of Part B. Under Part B of its application, the Applicant sought an order for the review, declaration of unlawfulness and setting aside of the Authority's refusal to condone the late submission of its renewal application; the and the Authority rejecting a new application for registration of a Low Power Class Commercial Broadcasting License.

On 22 July 2024, the Court dismissed the urgent application with costs. The application was dismissed on the basis that the applicant failed to prove the necessary elements of urgency in its founding papers. Part B review application will proceed.

FAILURE TO RENEW THE LICENSE AS PRESCRIBED

On 26 July 2024, the Authority received an application in terms of which On Digital Media t/a Star-Sat (Pty) Limited ("the applicant") filed an urgent application at the High Court, Pretoria seeking to interdict and restrain the Authority from taking any steps to close down the operations of ODM after 18 September 2024 pending the final determination of the relief sought in Part B. Part B seeks the review of the Authority's decision refusing to consider the applicant's late renewal application. Further, the applicant prays for an order that the renewal application be remitted back to the Authority for consideration decision within thirty (30) days from the date of the Court's order.

On 04 September 2024, the urgent review application was dismissed with cost and Order was granted in favour of the Authority to proceed shutting down ODM from operating. On 1 October 2024 the Authority was granted a warrant of execution to confiscate equipment from ODM's premises.

PART B

OUR STRATEGIC FOCUS

5. VISION

A connected and inclusive digital society.

6. MISSION

To regulate telecommunication, broadcasting and postal sectors in the public interest.

7. SHARED VALUES

I	Innovative
C	Collaborative
A	Accountable
S	Stakeholder-centric
A	Action-orientated

8. SITUATIONAL ANALYSIS

8.1 EXTERNAL ENVIRONMENT ANALYSIS

For the Authority to strategise and plan for the MTDP 2024-29 period of implementation, it performed a scan of its external and internal environments to gain a full understanding of the issues that require regulatory intervention within the country's communications sector and the issues that require adjustment in its internal environment so that it can respond appropriately to the issues in its external environment for the benefit of South Africans.

For the scanning of its external environment, the Authority held two environmental scanning sessions with communication sector's captains of industry, policy makers, associations, sister regulators and other interest groups.

8.1.1 OVERVIEW OF THE COMMUNICATIONS SECTOR

South Africa's ICT sector has undergone noticeable changes over the last three decades propelled by the advent of Industry 4.0, digital transformation and a variety of emerging technologies, proliferating across the world, which have changed many economic sectors that depend on ICTs for effectiveness.

CONTRIBUTION TO GDP

In 2024, South Africa's ICT sector contributed an estimated 3.0% to the country's gross domestic product (GDP). The digital economy is projected to account for 15-20% of South Africa's GDP by 2025, an increase from approximately 8-10% in 2020.

SECTOR SIZE

The sector's size is estimated at R642 billion in 2024, and is expected to reach R939 billion by 2029, growing at a CAGR of 7.90% during the forecast period (2024-2029) (Mordor Intelligence,2024).

DEVELOPMENT

South Africa leads in the IDI among the listed Southern African Development Community ("SADC") countries with a score of 83.6, demonstrating strong universal (82.6) and meaningful (84.6) connectivity (ICASA,2024).

NETWORK READINESS

South Africa is ranked seventy-four (74) out of hundred and thirty-four (134) countries on the ICT Network Readiness Index (NRI)[1] with a score of 45.85 compared with the United States of America (USA) ranked one (1) with a score of 76.91 (Portulans Institute, 2023).

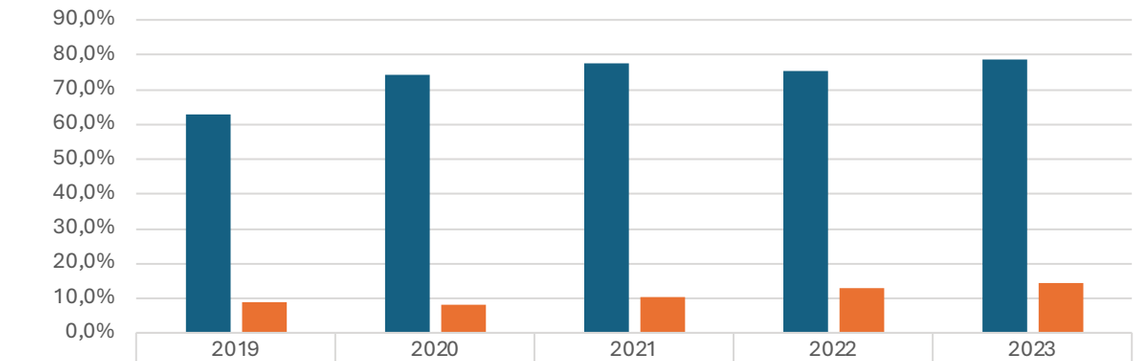
HOUSEHOLD INTERNET ACCESS

The national percentage of households with Internet access from any location rose from 75.3% in 2022 to 78.6% in 2023, reflecting a 3.3 percentage point rise (ICASA, 2025).

NATIONAL PERCENTAGE OF HOUSEHOLDS WITH INTERNET ACCESS

Access to internet from any location decreased from 77.5% in 2021 to 75.3% in 2022. However, there was an increase in the proportion of households with Internet access, specifically at home, rising from 10.4% in 2021 to 13% in 2022.

1 The Network Readiness Index evaluates 134 economies based on technology (access, content and future technologies), people (individuals, business and government), governance (trust, regulation and inclusion) and impact (economy, quality of life and SDG contribution) related to their readiness to harness the benefits of the digital revolution.



	2019	2020	2021	2022	2023
Anywhere	63,0%	74,1%	77,5%	75,3%	78,6%
At home	9,1%	8,3%	10,4%	13,0%	14,5%

Source: StatsSA GHS, 2019 - 2023.

Figure 2: Percentage of Households with access to the Internet at home, or for which at least one member has access to or used the Internet nationally in 2023

BROADBAND ACCESS

In terms of broadband access, the geographical coverage has significantly expanded to include 82.06% of the country's landmass, marking a substantial improvement in connectivity.

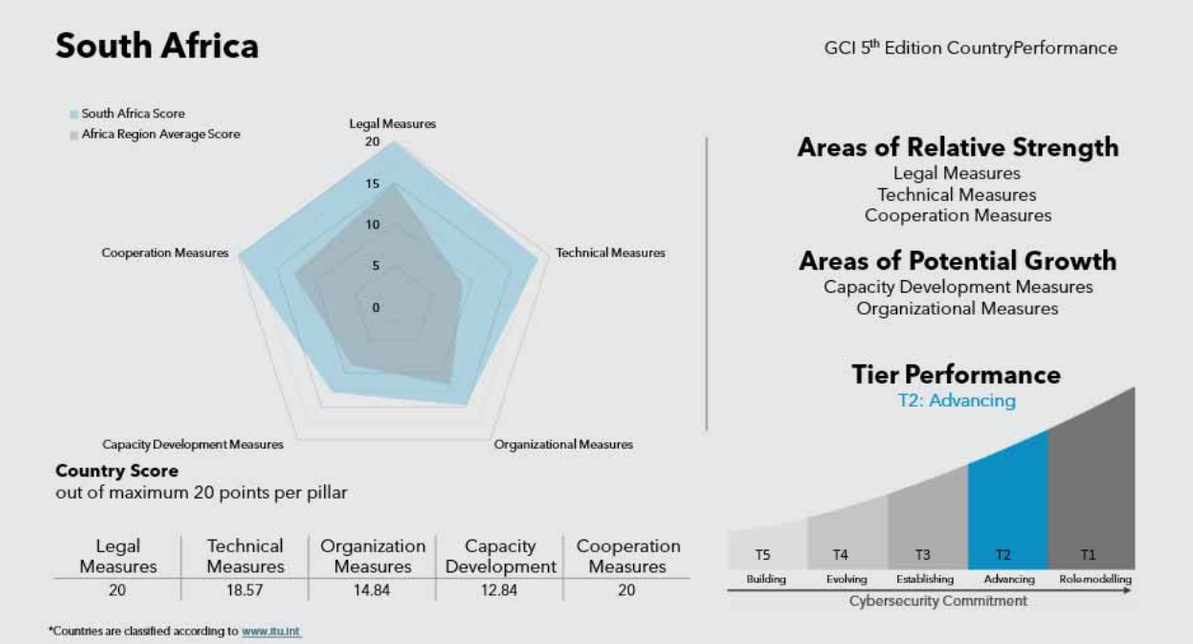
BROADBAND SPEED

South Africa is ranked number 104 on the 2023 Global Broadband Speed League of 220 countries at the broadband speed of 36.46Mbps (Cable, 2024).

CYBERSECURITY

South Africa's score on the Global Cybersecurity Index (GCI)[2] is T2 (Advancing) at 8.91 (ITU,2024). See Figure 2 below. Its areas of relative strength are legal, technical and cooperation measures. Its areas of potential growth are capacity development and organisational measures.

2 GCI measures the commitment of countries to cybersecurity in the context of measures across the following five pillars: Legal: Measuring the laws and regulations on cybercrime and cybersecurity, Technical: Measuring the implementation of technical capabilities through national and sector-specific agencies, Organisational: Measuring national strategies and organizations implementing cybersecurity, Capacity Building: Measuring awareness campaigns, training, education and incentives for cybersecurity capacity development and Cooperation: Measuring partnerships between agencies, firms and countries. Countries working to achieve cybersecure meaningful connectivity, the GCI offers a clear picture of where they are and a roadmap of activities to make progress.



Source: ITU 2024

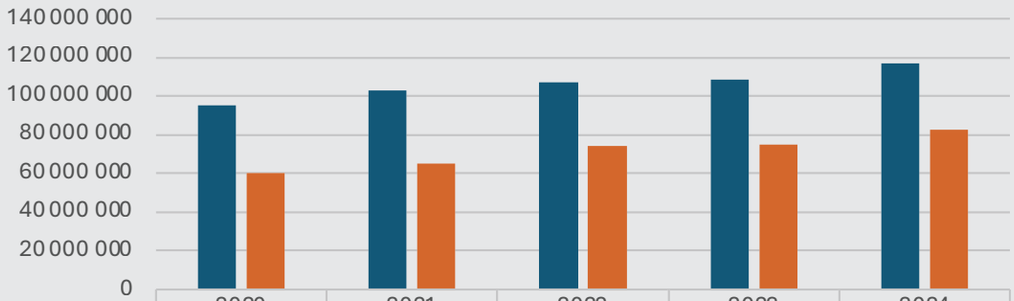
Figure 3: South Africa score on the Global Cybersecurity Index (GCI)

CONCENTRATION OF THE MOBILE MARKET

The South African mobile market is highly concentrated with an Herfindahl-Hirschman Index (HHI)[3] of 3 495 showing reasonable competition (Gillwald,2018).

MOBILE SUBSCRIPTIONS

In 2024, mobile cellular subscriptions increased by 7.46% to reach 116.8 million, while smartphone subscriptions rose by 10.36% to reach 82.7 million.



	2020	2021	2022	2023	2024
Mobile cellular subscriptions	94 952 509	103 167 525	106 800 158	108 700 620	116 813 021
Smartphone subscriptions	60 438 901	65 313 134	73 883 537	74 977 556	82 742 112

Source: ICASA Electronic Communications Questionnaire. 2020 - 2024

Figure 4: Mobile Cellular and Smartphone Subscriptions as of 30th September each year

3 HHI is used to measure competition by determining concentration in a market. It is calculated by squaring the market share of each firm competing in a market and then summing the resulting numbers. The fewer the number of firms in a market the higher the HHI, hence a monopoly. The converse is trye.

GOVERNANCE

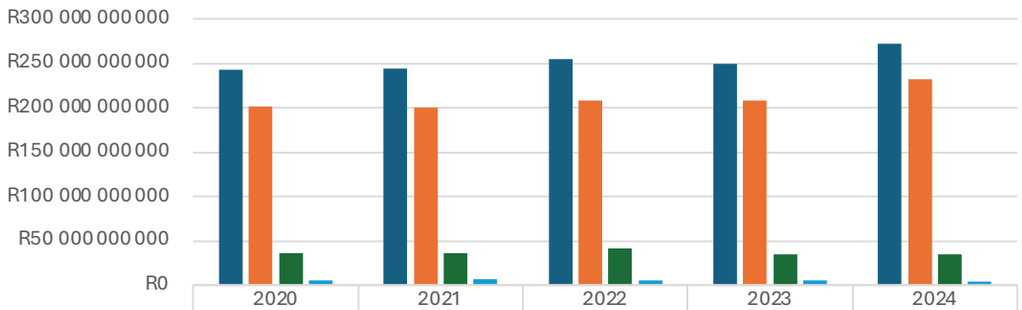
The sector's governance is shared between the Ministry of Communications and Digital Technologies and the Independent Communications Authority of South Africa (ICASA) in terms of policy and regulation respectively.

UNIVERSAL SERVICE AND ACCESS OBLIGATIONS

As of 2023, a total of 4,921 schools were connected to the internet as mandated by ICASA's Universal Service and Access obligations. KwaZulu Natal province boasts the highest number with 1,087, followed by the Eastern Cape province with 789, while Gauteng province recorded the lowest at 202.

SECTOR REVENUE

The combined revenue for the three sectors increased by 9.01% in 2024, driven largely by an 11.70% increase in telecommunication revenue. This surge is attributed to the rapid adoption of mobile technologies, increased internet penetration, and the rollout of 4G and 5G networks to support digital services. Additionally, the growth in e-commerce and remote working enhanced the demand for broadband services.



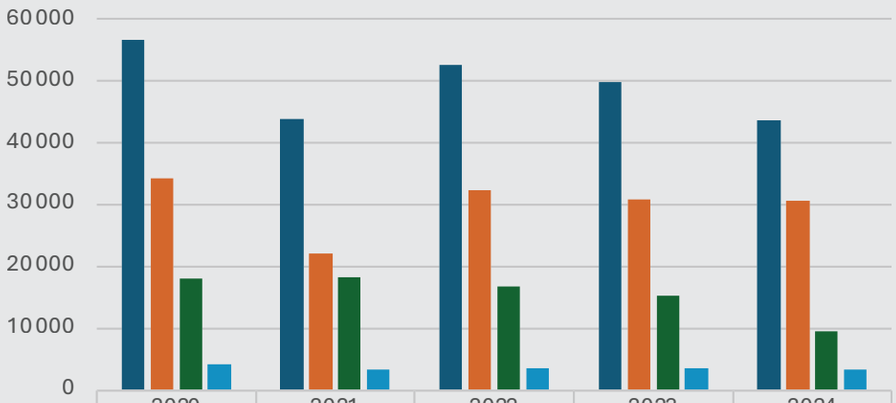
	2020	2021	2022	2023	2024
Total combined for 3 sector revenue	R243 019 264 975	R243 657 771 045	R254 881 511 121	R249 253 672 693	R271 722 794 891
Total telecommunication revenue	R201 254 592 538	R200 250 923 462	R208 145 121 928	R208 288 440 948	R232 667 956 493
Total broadcasting revenue	R35 814 897 915	R36 798 752 670	R41 202 864 454	R35 256 064 407	R34 624 793 241
Total postal service revenue	R5 949 774 522	R6 608 094 913	R5 533 524 738	R5 709 167 338	R4 430 045 157

Source: ICASA Electronic Telecommunications, Broadcasting and Postal Questionnaire 2020 – 2024.

Figure 5: Total Revenue of the three sectors, for the 12 months ending 30th September each year

EMPLOYMENT

In 2024, the combined employment across the telecommunications, postal, and broadcasting sectors decreased by 12.38%. The CAGR over the five-year period shows a 6.33% decline in total employment across the three sectors.



	2020	2021	2022	2023	2024
Total combined employment for 3 sector	56 550	43 862	52 634	49 689	43 538
Telecommunication employment	34 329	22 055	32 280	30 862	30 597
Postal services employment	17 984	18 363	16 792	15 303	9 570
Broadcasting employment	4 237	3 444	3 562	3 524	3 371

Source: ICASA Electronic Communications, Broadcasting and Postal Questionnaires 2020 – 2024. 5G Deployment

Figure 6: Total employment for the three sectors as of 30th September each year

As of 2025, 5G, currently covers 46.64% of the population. In 2022, 5G population coverage stood at 20%, by 2023, it stood at 38.42%.

LOADSHEDDING EFFECT

Spending on battery backups saw a steep decline, plummeting from R2.59 billion to R173.75 million. This reduction was reflected in the number of battery units purchased, which fell sharply from 150,415 to just 44,708 units.

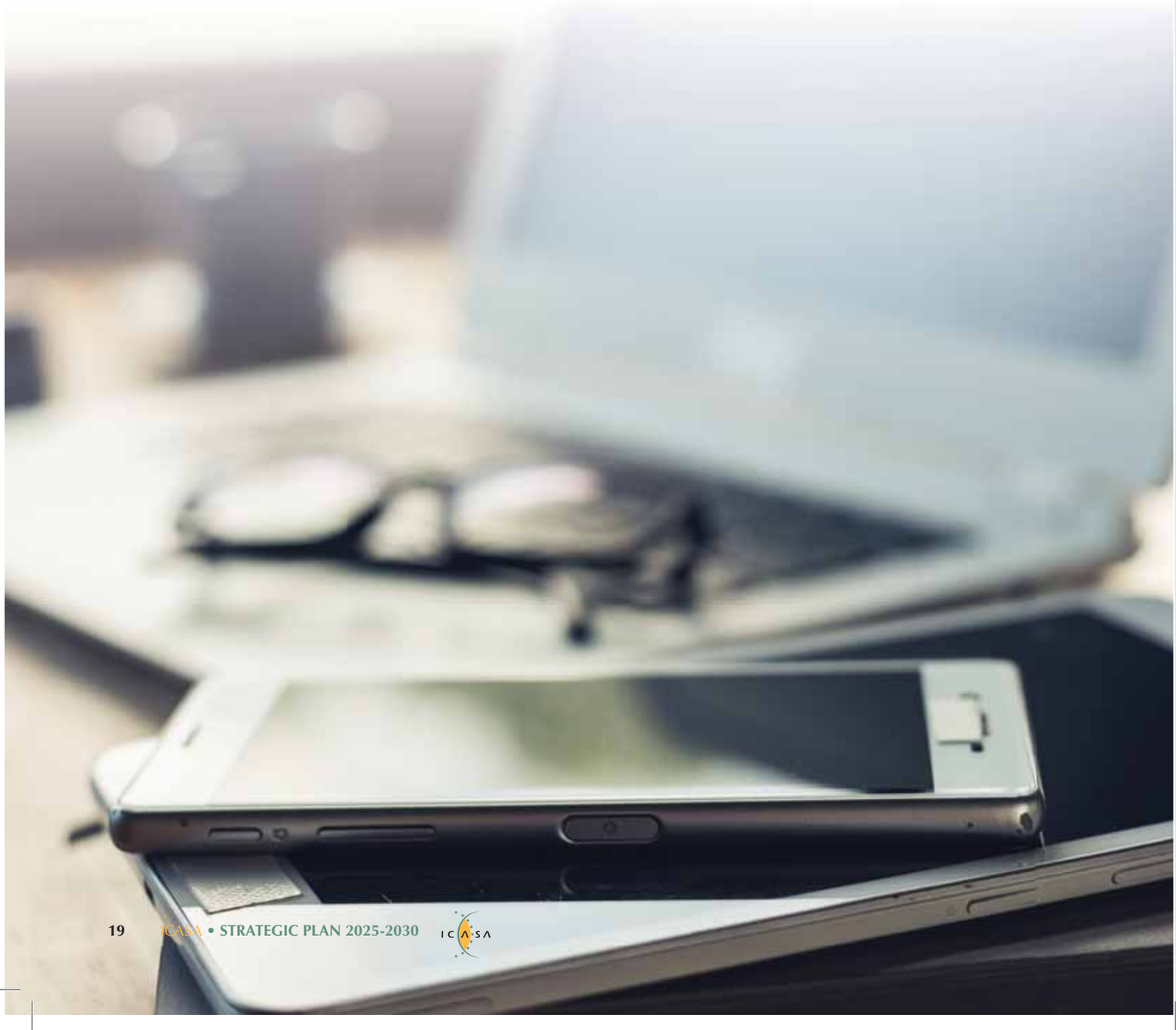
Similarly, the investment in generator systems also experienced a noteworthy downturn, with expenditures dropping from R930.21 million to R211.47 million. The number of generators purchased saw a significant reduction, decreasing from 3,268 units to a mere 855.

SOUTH AFRICA'S INTERNET SPEED

Table 2: South Africa Speed Test 2021-2025

FIXED BROADBAND					
	2021	**2022**	**2023**	**2024**	**2025**
Fixed broadband speed (ranking)	87	100	95	103	102
Fixed broadband download speed (Mbps)	38,25	28,63	43,23	43,66	48,51
Fixed broadband upload speed (Mbps)	26,3	23,16	33,06	37,24	39,75
FIXED BROADBAND					
Mobile broadband speed (ranking)	55	61	58	53	61
Mobile broadband download speed (Mbps)	38,95	30,36	34,71	47,95	49,81
Mobile broadband upload speed (Mbps)	10,71	7,12	6,79	8,13	9,17

Source: OOKLA, Speedtest intelligence 2021 - 2025.



8.1.2 STAKEHOLDER ANALYSIS

Stakeholders in the South African communications sector have power to influence the outcome of a project, decision or activity. They also have interest which is gauged by the degree to which they are affected by a project, decision or activity. The grid below presents how different stakeholders interface in terms of power and interest and how the Authority will behave towards them.

Table 3: ICASA Stakeholder Analysis

POWER: HIGH	**KEEP SATISFIED** **Political Leaders:** Elected officials who may not be directly involved but have significant influence. ****Interest**:** Low, unless issues arise that are politically beneficial. ****Power**:** High, as they can propose, support, or block legislation affecting the sector. **Investors/Shareholders:** Individuals or groups with stakes in communications companies. ****Interest**:** Low to Moderate, focused on financial returns rather than regulatory details. ****Power**:** High, as they could exert influence on corporate policies and strategies.	**MANAGE CLOSELY** **Government Agency:** Department of Communications and Digital Technologies. ****Interest**:** High, as it shapes policies and regulations that affect the communications ecosystem. ****Power**:** High, as it can enforce regulations and policy changes and provide funding. **Communications Providers:** Major players like Vodacom, MTN, Cell C, Radio Stations, Postal Services Providers, ****Interest**:** High, as they are directly affected by regulations and compliance requirements. ****Power**:** High, given their ability to influence market dynamics and public perception,
POWER: LOW	**MONITOR** **Small Communications Providers:** Local or regional companies with limited market impact. ****Interest**:** Low, as they may adapt to broader regulations set by larger companies. ****Power**:** Low, as they have minimal influence on policy or regulation. **Research Institutions/Think Tanks:** Those that study telecommunications policy but don't engage directly. ****Interest**:** Low to Moderate, focused primarily on research, rather than active involvement. ****Power**:** Low, though they can influence thought leadership and public discourse.	**KEEP INFORMED** **End Users:** General public using telecommunications, broadcasting and postal services. ****Interest**:** High, as they are concerned with service quality, pricing, and access. ****Power**:** Low, as individual voices may not have significant impact, but collective consumer action can influence change. **Advocacy Groups:** Organizations focused on consumer rights, digital privacy, and access to information. ****Interest**:** High, as regulations directly impact their causes. ****Power**:** Low but can mobilize public opinion and raise awareness on important issues.
	INTEREST: LOW	**INTEREST: HIGH**

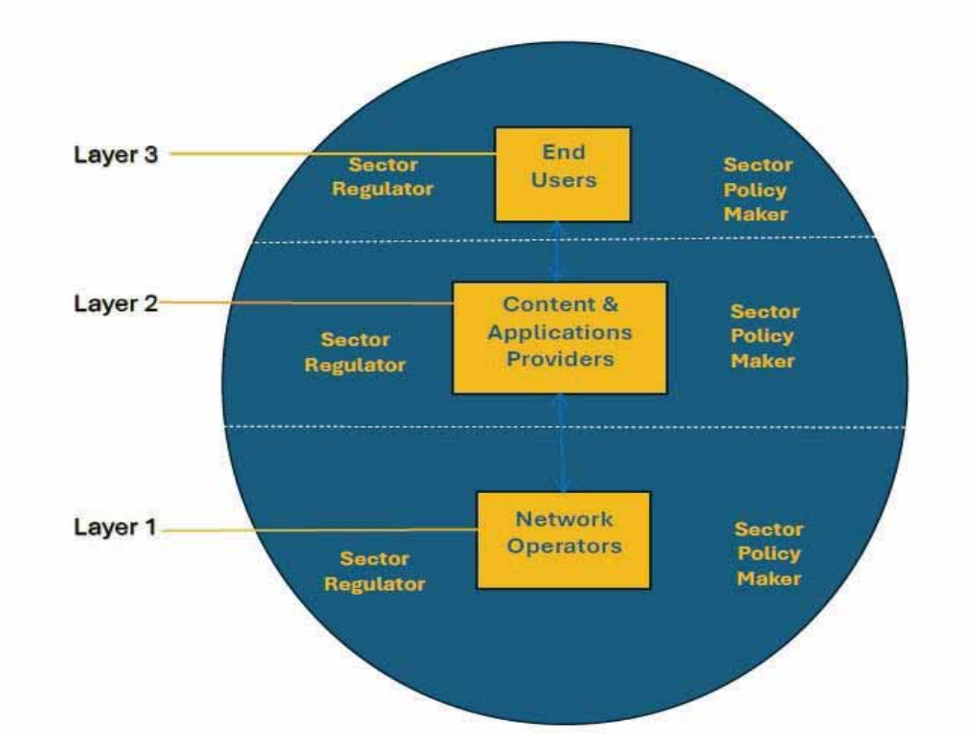
The Authority must engage actively with high-power, high-interest stakeholders to understand needs and foster collaboration; monitor and maintain positive relationships with high-power, low-interest groups to ensure they remain supportive; provide updates and cultivate relationships with those interested but lacking power to ensure informed support; and keep an eye on low-power, low-interest stakeholders but allocate fewer resources since their influence is minimal.

On the overall, the Authority must establish regular engagement sessions with high-power stakeholders for policy discussions; conduct surveys and feedback loops with consumers and advocacy groups to gauge sentiment on regulations and leverage online platforms and community forums to raise awareness among low-power end-users.

COMMUNICATIONS SECTOR ISSUES

The DPME Revised Framework for Strategic Plans and Annual Performance Plans, December 2019 recommends use of situational analysis techniques such as PESTEL, Balanced Scorecard, Fishbone analysis and any others that may prove appropriate to the work of a government institution.

Thus, scanning of the external environment to identify the key issues on which the Authority will develop and implement interventions for the MTDP 2024-2029 period was done using a simplified version of the Fransman's new ecosystem framework[4] as opposed to a PESTEL technique. The Fransman's new ecosystem framework was chosen due to its appropriateness to the communications sector in which the Authority operates. The communications sector has converged, and it is no longer in the traditional way that divides the sector into telecommunications, broadcasting and postal services sub-sectors. Refer to Figure 6 for a simplified depiction of Fransman's new ecosystem framework.



Source: Modified from Fransman (2010)

Figure 7: A Simplified Version of the Fransman's New ICT Ecosystem

4 The New ICT Ecosystem refers to the interactions between three groups of players: network element providers (those who provide the individual elements of networks) Layer 1; network operators (those who create and operate networks) Layer 2; platform, content and applications providers (those who use elements and networks to provide content and applications) Layer 3; and final consumers (divided into various subgroups) Layer 4 (Fransman 2010).

The Fransman's new ecosystem framework uses three layers for analysis of the environment in which an entity operates,

- Layer 1: Network Providers
- Layer 2: Content and Applications Providers
- Layer 3: End-users

Layer 1 – Network Operators: Networked elements including routers, switches, computers, and PCs with their operating systems which are produced by companies are strung together to form converged networks, including telecoms, cable, satellite and broadcasting networks.

Layer 2 – Content and Applications Providers: The companies in Layer 1 produce content and applications which is consumed by end users in layer 3.

Layer 3 – End Users: These are the consumers of ICT goods and services who may be divided into companies (large and small), households, government, and others.

LAYER 1: NETWORK PROVIDERS

The South African communications network ecosystem comprises elements that ensure the ability to undertake electronic communication, broadcasting and postal communication operated by a variety of network providers who operate the network based in South Africa or other countries.

The table below presents the type of networks that were analysed and the network providers that operate them, which the Authority engaged with during the external environmental scanning session.

Table 4: Types of Communication Networks and Providers in South Africa

Aspect	Content
Types of Networks	**Terrestrial Networks:** Terrestrial: stations on the ground, at sea, in the air up to≈50 km - Fixed service: fixed wireless access, backbone lines, backhauling - Land Mobile: mobile broadband -ubiquitous connectivity, PMR - Aeronautical mobile: comms with aircraft, at airports, WAICs - Maritime mobile: communications with ship, shore, e-navigation - Broadcasting: TV and sound program delivery to the population - Radio-navigation: location and navigation - Radiolocation: object detection, transport safety, e.g. intelligent transport systems (ITS), air/maritime traffic control - Other: Amateur, Meteorological aids, standard frequency and time signal **Signal distributors (Sentech)/ Broadcasting:** - DVB T/ T2-Lite/ T2 - ATSC (Advanced Television Systems Committee) - ISDB (Integrated Services Digital Broadcasting) - PAL (Phase Alternating Line)/ NTSC/ SECAM - AM/ FM - Digital radio Mondiale (DRM), Digital sound broadcasting (DSB) - 5G broadcasting - DVB-C (cable) - DBV-H (handheld) **Space Networks:** - Satellite constellations - Broadcasting communication Satellite (DVB S/S2/S2x) - Mobile communication Satellite - Fixed communication Satellite

Aspect	Content
Types of Networks (continued)	**Postal Networks:** - Traditional post offices/services - Logistics networks (i.e., FedEx, DHL) - e-commerce, online - Reserved/unreserved postal services **Internet Networks:** - IPTV - Internet radio - OTT/ Podcasts/ Video Sharing platforms - VOIP - Social Media - Streaming - FinTech - eCommerce - Internet-of-things - Community networks - Smart Cities (stand-alone networks) **Airborne Networks:** - Unmanned aircrafts (Drone) networks - HAPS (high-altitude platform stations) **Data Centre Networks:** - Amazon Web Services (AWS) data centres - Microsoft Azure data centres - Google Cloud Platform (GCP) data centres - Teraco **Government Networks:** - Broadband Infraco - SITA - Security services
Companies	**Telecommunications Companies:** Vodacom, MTN, Telkom, Cell C, Rain, Orange, ISPs, WISPs **Fixed Telecommunications Companies:** Vumatel, MetroFibre, Seacom, WIOCC, Dark Fibre Africa **Traditional Broadcasters:** SABC, FM, MultiChoice, Highveld Stereo. **Satellite Operators:** Intelsat, Immarsat, Eutelsat, Oneweb, Starlink (SpaceX), etc. **Postal Services:** Post Office, FedEx, DHL **Data centres Operators:** Amazon Web Services (AWS) data centres; Microsoft Azure data centres; Google Cloud Platform (GCP) data centres, Sentech, MTN **Internet service Providers:** Netflix, Showmax, Apple TV, Facebook, Takealot, Yoco

Table 5 below provides the issues or plans that were identified on the South African communication networks at the stakeholder engagement session that was held with different stakeholders in the South African communications sector. The table also presents the strategies/postures that were suggested to resolve the issues identified.

Table 5: Identified Issues/Plans on the South African Communication Network with Postures/positions that ICASA has taken on them

No.		Issues/Plans	Strategy/Posture
1.	**Telecoms**	The emergence of advanced digital technologies increases the demand for spectrum resources. Newer ICT technologies and infrastructure is needed in the rural, remote and underserved areas to mitigate the widening of the digital divide.	1. On an annual basis, update/amend the under-serviced areas as contained in the definition of the Regulations: Under-Serviced Areas. These regulations are crucial in understanding where interventions are required to bridge the digital divide. 2. Enable proliferation of emerging technologies by licensing the IMT Spectrum with the recognition that data has become a basic need and, therefore a free basic data grant is necessary mainly to households that cannot afford it in the under-serviced areas. This is seen as an effort to bridge the digital divide and not leave anyone behind.
2.	**Telecoms**	The high cost of smartphones, devices and data, especially in low-income households, is a significant barrier to digital inclusion.	1. Track the smartphone pricing as part of the Annual ICT Sector Report. 2. Conduct an inquiry on the Smartphone pricing and introduce applicable interventions to remove the barrier.
3.	**Telecoms**	Rural areas in South Africa remain underserved by mobile broadband services, mainly due to the high costs associated with deploying infrastructure in low-density populations.	1. Intensify Compliance and Monitoring to actively implement the Use it or lose it principle as promoted in Section 31 (8 -10) of the ECA. 2. Formulate regulations to enable community-based networks to use the IMT Spectrum that is not deployed in various Communities.
4.	**Telecoms**	As more South Africans adopt digital services, concerns around cybersecurity and privacy are growing. Without adequate protections, citizens face the risk of data breaches, fraud, and online vulnerabilities, which could undermine confidence in using technology.	1. ICASA will promote cybersecurity measures and collaborate nationally and internationally to develop and enforce cybersecurity standards. 2. It is important for ICASA to ensure network reliability and information security. By ensuring that networks are secure and reliable, the Authority will foster trust in digital platforms, allowing citizens to use online services safely and confidently, taking into cognisance the Cyber Security Bill. 3. ICASA will promote cybersecurity awareness. 4. Conduct Benchmark studies in various markets and collaborate with relevant stakeholders.
5.	**Telecoms**	Fraudulent activities, including call masking and manipulation of caller line identification (CLI), have affected many citizens, leading to scams and security breaches.	1. ICASA aims to strengthen monitoring and enforcement of the regulations and invest in systems to detect and prevent fraud. (Licensees are prohibited from manipulating CLI in terms of the Numbering Regulations). 2. Develop a regulatory mechanism to collect evidence from mobile network operators and deal with manipulating CLIs.

No.		Issues/Plans	Strategy/Posture
7.	**Telecoms**	Pre-Rica'd Simcards that are not correctly registered to the user of the Simcards – contribute to the issue of identity fraud.	1. ICASA will enforce efficient number management by influencing the Department of Justice in implementing biometric registration. 2. Strengthen enforcement and number management.
9.	**Telecoms**	International roaming remains costly for South African citizens. Technology advancements provide alternative ways to bypass traditional roaming arrangements. International Roaming (switching gateways)	1. ICASA will review the international roaming market to assess whether current regulations remain relevant. ICASA will consider the work done by the Southern African Development Community (SADC) and Communications Regulators' Association of Southern Africa (CRASA) to reduce the roaming costs in the SADC region. 2. ICASA will monitor the impact of satellite-based services and their potential role in providing more affordable cross-border communications.
10.	**All**	Climate Change – Sustainability of networks	1. Assess whether the ICT infrastructure/networks are resilient enough to cope with severe weather patterns. 2. Encourage the deployment of sustainable infrastructure.
11.	**All**	No Common concept/metrics that can be used to measure performance on networks, particularly fixed networks	1. Formulate a framework to measure the performance of networks. 2. Develop an online dashboard to track industry indicators and find means to verify them.
12.	**Telecom**	Rapid Deployment	1. Develop collaborative regulations for Rapid deployment, e.g., COGTA, to open up more government sites for network deployment and solve the dispute between licensees and property owners. 2. Reduce the timelines for processing license transfer applications, particularly the I-ECNs' licenses.
13.	**Telecom**	Impact of the 2022 Spectrum Auction	1. ICASA to conduct Regulatory Impact Assessment for the 2022 Spectrum Auction
15.	**Telecoms**	Individual Electronic Communication Network Service Licences are set to expire in 2029	1. The Authority to initiate the renewal process three years before it expires.
16.	**Broadcast**	Network deployment, maintenance, and operating costs for Digital Terrestrial Television are increasingly unaffordable for licensees. This affects the sustainability of DTT services, potentially limiting citizens' access to free-to-air and public broadcasting.	1. ICASA will develop regulations and technical rules for MUX operators. 2. ICASA will finalise its review of the digital migration regulations. The outcome will inform if there is a need to advise the Minister to review the Policy. Engage the department to determine the current state of digital migration and its impact on the 4.4 million households that do not have STBs. The delay in subsidising the STBs was met with an increase in households with analogue TVs. 3. The Authority must engage the policy maker to open up technology neutrality for DTT to deploy the viable technologies the industry deems fit, thus allowing the Authority to develop technical rules for coordination and interference avoidance.

No.		Issues/Plans	Strategy/Posture
17.	**Broadcast**	Congested VHF/FM band	1. Implement digital sound broadcasting Regulations
18.	**Broadcast**	The rise of over-the-top (OTT) services, such as Netflix and WhatsApp, has disrupted traditional broadcasting and has seen regulated traditional linear broadcasting compete with these services for audiences and revenue. OTTs disrupt the broadcasting environment and affect the use of conventional infrastructure and networks, threatening to render them useless.	1. Conduct a market Inquiry on OTTs to establish the impact on licensees and various markets, taking into cognisance the policy review on audiovisuals.
19.	**Broadcast**	Network Security and Data Protection- (As broadcasting becomes more digitised and reliant on IT networks, the risk of cyberattacks increases, threatening content distribution and operational continuity. Ensuring security and privacy in broadcasting networks is essential. Signal piracy, malware, deepfake.	1. ICASA will intensify awareness among consumers
20.	**Broadcast**	Analogue Switch-off date not feasible	1. The Authority must continuously collaborate with the Ministry to advise as an evidence-based regulator.
21.	**Broadcast**	DTT system and its network was deployed in 2014. It requires a technology update and has high maintenance costs. There is no competitor in the signal distribution market for DTT	1. ICASA will recommend that the Policy Maker review the Digital Migration Policy to balance the deployment of DTT and DTH.
22.	**Broadcast**	Network Security and Data Protection- (As broadcasting becomes more digitised and reliant on IT networks, the risk of cyberattacks increases, threatening content distribution and operational continuity. Ensuring security and privacy in broadcasting networks is essential. Signal piracy, malware, deepfake.	1. Network awareness and Enhancement.
23.	**Postal**	As letter mail volumes decline, the postal sector shifts toward digital services and e-commerce parcel delivery. This shift has created new opportunities and challenges in meeting the changing needs of South African citizens.	1. Conduct an Inquiry to understand the market better and introduce appropriate interventions.
24.	**Postal**	Universal service obligations (USOs) ensure all citizens can access basic communication services. However, the current framework may not adequately align with the evolving market and technology landscape.	1. ICASA will review and update universal service obligations to reflect the needs of modern South African society, ensuring that rural, low-income, and underserved citizens are prioritised in delivering essential services such as broadband, postal services, and digital platforms.
25.	**Postal**	The postal industry has shifted from physical operations to digital postal services. (e-commerce parcel delivery) Investigate whether regulations are still fit for purpose.	1. Conduct an inquiry to investigate the role of the Regulator in e-commerce and the appropriate regulatory approach

No.		Issues/Plans	Strategy/Posture
26.	**Postal**	Reserved postal service is becoming unsustainable	1. Review current monitoring and enforcement strategies to ensure SAPO improves its quality of services and operational efficiency.
27.	**Government**	Lack of participation of government and security services on regulatory matters.	1. Promote collaboration to identify the needs of government and security services to ensure that they are not left behind.

LAYER 2: CONTENT AND APPLICATIONS PROVIDERS

ICT companies create applications or platforms that they use to create content that is consumed by end users. South African end-users also consume content produced internationally through a variety of applications, most of which are internationally owned and based.

CONTENT

Content consumed by South African end-users can be classified into audio and audiovisual. Service providers providing content include South African Broadcasting Corporation, eMedia, Multichoice, Community Radio/TV Services and Media 24, Ster-Kinekor, NuMetro, YouTube, WhatsApp and other such applications that South Africans can access through their devices.

In its 2002 review of the previous regulations the Authority stated in the final Position Paper on South African content, that: *"The Authority, as the national custodian of South African content, is committed to the ideal espoused in the White Paper on Broadcasting Policy that television and radio should be predominantly South African.*

It is clear from the hearings and the monitoring of licensees that broadcasting South African content is not regarded as a burden. Indeed, broadcasters see South African content as an opportunity to meet changing audience needs and to grow the South African industry, while contributing to the emerging democratic culture of the country.

What is also clear as a result of the public process is that not all categories of programming and all stations need to be regulated to ensure they become predominantly South African. The Authority believes that, in the light of the shortage of resources within the sector and within the Authority itself, the Authority should only regulate that which requires regulation[5]."

The Authority, seeking to live up to its own Discussion Document[6] has promulgated the Regulations to ensure that the Licensees it regulates, provide content that is appropriate and meets the needs of the consumer at large. The South African Music Content Regulations, 2016 and the Local Television Content Regulations, 2016 have since been promulgated and remain in force.

Recently though, it has become possible to deliver content via over the top (OTT) online, internet platforms than the traditional broadcasting network services. However, the world of streaming is upon us and turning delivery of content via traditional broadcasting, on its head.

Delivering content can be achieved through various Applications that come preloaded on smart devices, such as mobile phones, tablets, laptops, desktops, and smart (mainly high definition) television sets.

Table 6 below presents the issues that were identified in the realm of content creation and consumption in South Africa.

5 Discussion Document as published in Government Gazette No. 37803 dated, 4 July 2014 (page 12).

6 Ibid

Table 6: Identified Issues/Plans on the Content that is Consumed in South Africa with Postures/Positions that ICASA has taken on them

Issues	Our Strategy/Posture
1. Audio visual No local content requirements for OTTs, potential negative consumer impact, fake news, deep fake, cyber bullying, onerous regulatory requirements for community radio services, lack of knowledge of regulatory framework, protection and viability of the public broadcasting services, cross media ownership and control (parked), delay or failure to review regulations for amendment. **2. Audio** Fake news, onerous regulatory requirements for community radio services, lack of knowledge of the regulatory framework, protection and viability of the public broadcasting services, delay or failure to review regulations for amendment. (Dealt with under Audio Visual). **3. News and Current affairs** Fake news, business case for local news producers under threat (rephrase), selective or heavy urban bias news reporting. **4. Documentaries** No issues **5. Film and Short Video** Child pornography. **6. Sport** Inability to access sports of national interest. **7. User generated content** Does not conform to or is subject to any production, editorial standards.	1. awareness on regulatory framework for community radio and tv services. 2. Sustainability of the public broadcasting service. 3. No monopolies, Ensure diversity of views. 4. Support the work of the Competition Commission to ensure a level playing field. 5. Collaboration with other agencies i.e. FPB. 6. No exclusivity to access the right to broadcast sports of national interest. May require change to the law which is beyond ICASA's scope. Sec 2 (y) read with sec 60 (1) of ECA is clear on non-exclusivity. 7. Collaborate with the Information Regulator, Competition Commission, etc, to deal with spam and nuisance calls. Enforce Regulations and tighten them even more from a numbering perspective. 8. Need for more awareness on user generated content. 9. Undertake Regulatory Impact Assessment (RIA), more regularly.

APPLICATIONS

South Africans use a variety of ICT applications to consume content in cyberspace. The list below provides applications that provide content to end-users in South Africa and the names of some of the service providers that provide the applications.

Table 7: Applications that are used in South Africa and the Service Providers that offer them

Application	Service Provider[7]
OTTs **(a) Instant messaging applications** WhatsApp Telegram **(b) Streaming** Showmax Netflix YouTube **(c) Social media** Facebook X Instagram **(d) Online Gaming** Xbox PlayStation6 Steam	Multichoice Netflix Vox
Email	Microsoft Google
IoT	Polymorph Groove Jones
Fintech	Vodapay Momo (MTN)
Navigation	Google maps Waze
Safety of life	Namola Gauteng ePanic Apple
Weather Service	South African Weather Services

7 The list is not exhaustive.

According to The History of Mobile Apps – Inventionland[8] *"In 1997, the Nokia 6110 included a built-in version of the basic arcade genre game "Snake," which many consider the first mobile app. The first iPod would also come with built-in games: Solitaire and Brick. Back in 1983, however, a young Steve Jobs envisioned the App Store…or at least a very basic version of it."*

The ubiquitous Applications or Apps as we know them today have become a modern-day fad. Apps are something we can hardly do without and there is no manufacturer worth their salt, that can dare enter the market let alone not have the popular few included in their smart device. The Apps do serve a critical role, though; for example, banking apps, insurance apps, and even the South African Revenue Services (SARS) have their own, which make it very convenient for filing tax returns. However, all Apps remain unregulated.

Apps do not pay any direct fees to the Authority government tax and they are not subject to any Regulations. They operate beyond borders because of their multinational nature. That they are not regulated along the lines of the Licensees, that is the crux of the discussion currently.

Therefore, the Authority faces the challenge of considering how to navigate the world of Applications and to regulate them, if at all. At the very least, the Authority will probably come up with some or other inquiry into OTTs, that will better inform how to deal with all Applications on smart devices.

Table 6 below presents the issues that were identified by the Authority and its external stakeholders which it will be addressing the MTDP 2025/26-2029/30 period.

Table 8: Identified Issues/Plans on the Applications used in South Africa with Postures/Positions that ICASA has taken on them

Issues	Our Strategy/Posture
OTTs No legislative framework. **2. Email applications** No legislative framework. **3. IoT** No legislative framework. **4. Digital Financial Services** No legislative framework. Convergence between digital financial services and ICT. **5. Navigation** Processing and sharing of personal information without user consent, no or lack of formal addresses, navigational inaccuracies, and adherence by international bodies to cyber security Regulations. Plan-Regulators Forum established **6. Safety of life** No national disaster recovery plan on electronic communications, SADC model on national emergency communication plan **7. Weather services** Data integrity and accuracy. **8. Spam** Nuisance calls and messages.	Develop a discussion document on OTTs. Follow and contribute to the work of the ITU and IoTs e.g. Study group 20. Develop a South African use case for smart cities.

8 https://inventionland.com/blog/the-history-of-mobile-apps - extracted on, 23 Oct

LAYER 3: END-USERS

There is substantial progress noted in expanding ICT access to consumers/end-users, in the areas of Postal, Telecommunications and Broadcasting sectors. However, there is a persistent challenge in addressing widespread consumer inclusion across South Africa.

Disparities in connectivity, digital literacy, and access to affordable services persist, disproportionately affecting underserved and rural communities.

It is widely acknowledged *that consumers/end users are no longer just people and organisations; they now include machines and robots. The traditional way of regulating has proven ineffective and inefficient in addressing these areas. Despite regulatory challenges, broadening the definition of consumers to include a variety of digital consumption* will help in regulating these areas.

Artificial intelligence (AI) systems are becoming increasingly used by consumers/end-users. The trend in increasing use of AI is attributed to advances in machine learning (ML) model technology. Despite the increase in AI use, this area has proved to provide limited customer experience (specifically in communicating with consumers) using consumer`s languages. To address the challenge, a code of conduct for the use of customer service points will be developed.

Postal service sector is facing several major challenges. The challenges include the decline in mail volumes and drop-in profit margins and leading to continuous operating losses and financial difficulties.

Despite the difficulties faced by postal services, the challenge of inadequate, unreliable, insecure access to postal services remains. To mitigate the challenge faced by the Postal sector, Authority will influence policy direction to open the reserved postal competition with conditions (universal obligations).

Authority faces the critical task of addressing the issues of quality of services, network availability, network accessibility and service availability by consumers. Authority will enhance compliance efforts to ensure that operators comply with the standards. To further strengthen the quality of service, the Authority will look into procuring the quality-of-service monitoring system, reviewing quality-of-service regulations and performing live monitoring audits where necessary.

Another area of concern regarding quality of service that requires attention is that the Authority publishes an ICT sector report annually with few industry indicators. To enhance and improve the report, the Authority will consider establishing an online dashboard to monitor key industry indicators and measure performance.

End users/consumers face challenges of data protection, privacy, online security, and safety, to mention but a few. Consumers are also increasingly concerned about the industry's unethical considerations. Through collaboration with other regulatory functions, the Authority will enhance efforts to reduce the challenges faced by consumers.

Table 9: Identified Issues/Plans on the End-users in South Africa with Postures/Positions that ICASA has taken on them

Issue/Plan	Posture/Position
End-user definition problem. Consumers / end-users are no longer just people, organizations), they are also machines / robots Digital content and Generative AI The use of AI which has limited customer experience (communication with consumers)	Broaden the definition of consumers to include a variety of digital consumption Digital literacy and localisation of content Develop the code of conduct for the use of customer service point
Inadequate, unreliable, insecure access to postal services Limited access to digital content Inadequate adoption of technologies to meet customer demands (e.g. E-commerce) Readiness to harness the use of AI and ability to regulate it	ICASA to influence policy direction to open the Reserved Postal Competition with conditions (universal obligations) Promote means of consuming/accessing digital content Zero-rating of websites.
Poor access to communications Services • Network unavailability; no network signal • Network accessibility; having a signal by you cannot access it • Service availability; connected to the network but no service **Postal** • Late delivery of mail • Damaged/stolen mail • Closure of postal outlets	**Enforcing compliance** ICASA to procure a quality-of-service monitoring system Perform live monitoring audits at the licensees' operations (Sec 69 (5)(f) of ECA) The collective effect of service performances which determine the degree of satisfaction of a user of a service. It is characterized by the combined aspects of performance factors applicable to all services, such as: • service operability performance • service accessibility performance • service retainability performance • service integrity performance • other factors specific to each service. Collaborate with Research Institutions to develop a monitoring framework Review quality of service regulations Review of the reserve postal service sector Review of the universal service obligations Review of mail conveyance framework Influence policy direction to introduce a second licensee
Indicator reporting Currently, ICASA publishes an ICT sector report annually with few industry development indicators.	ICASA should consider establishing an online dashboard to monitor key industry indicators and measure performance.
Data protection and privacy Online security and safety for consumers Inadequate Ethical considerations for consumers	Collaborative regulation to tighten online security (to address SIM fraud (RICA), Cybersecurity, and Banking fraud) Encourage responsible online behaviour Data rollover rules, biometrics
Consumer (billing and quality of service) complaints	Strengthen transparency and enforcement efforts Collaborate with other bodies (such as the consumer complaints issues where there is a lack of capacity and instead of overregulating)
Issue/Plan	**Posture/Position**

Lack of consumer participation in the regulation-making process Lack of community participation in the community radio stations	Advocacy groups / Consumer commissions, simplify regulations Promote transparency and awareness to regulatory obligations and compliance requirements awareness to the communities on their rights to participate in the radio stations
Lack of awareness of the social obligation benefits by consumers	Provide awareness Develop reliable database
Inability to access communication services by people with disabilities	Operators to roll out the emergency NRS Review regulations, Enforce compliance & monitoring

8.1.3 DEMAND FOR THE AUTHORITY'S SERVICES

As a regulator, the Authority is a nexus between communication service providers, consumers and policy makers. It must serve its licensees in terms of its regulatory mandate and protect consumers from malpractices by the licensees. It must also continue to be part of the national developmental effort to better South Africans through communication services.

The external situational analysis the Authority performed revealed that the stakeholders value the presence of the Authority as a player in the South African communication sector. In their words "there would be chaos in the sector if there was no body to regulate it." However, the stakeholders had reservations about certain things that the Authority does which they feel the Authority must stop, those that the Authority must start doing and those that it must continue doing.

8.1.4 PARTICIPATION OF WOMEN, YOUTH AND PERSONS WITH DISABILITIES IN THE SECTOR

In South Africa, women continue to face challenges in accessing economic opportunities, despite policies aimed at promoting inclusion. The proportion of working-age males rose slightly from 49,2% in Q2:2014 to 49,6% in Q2:2024, while the percentage for females dropped from 50,8% in Q2:2014 to 50,4% in Q2:2024 (STASSA, 2024). Women are increasingly participating in various roles within the sector, including journalism, marketing, and communications. However, challenges such as pay inequality and access to leadership positions remain.

According to Statistics South Africa (Stats SA) 2024 mid-year population estimates, approximately 21 million South Africans, or 33.1% of the total population, are considered young, defined as individuals aged 15 to 34 years. According to STATSSA, the youth unemployment rate decreased from 45.5% in Q3 2024 to 44.6% in Q4 2024. The communications sector offers numerous entry-level positions for youth, particularly in areas like social media, digital marketing, and content creation. Various initiatives aim to provide young people with skills relevant to the communications industry, such as internships, training programs, and partnerships with educational institutions.

According to the STATSSA 2022 figures approximately 3.3million people live with disability in South Africa. The South African government and private sector have made strides towards inclusion, implementing policies aimed at improving accessibility and employment for persons with disabilities. Nevertheless, challenges still exist, including physical accessibility issues and societal attitudes that can hinder employment opportunities in the communications sector.

The South African government has recognized the importance of inclusive growth and has taken steps to improve digital access for underrepresented groups. Non-governmental organizations and advocacy groups are working to promote inclusivity and support for women, youth, and persons with disabilities in the communications field.

9. INTERNAL ENVIRONMENT ANALYSIS

For the Authority to be able to offer its services and address the issues it has identified in its performance environment and implement the strategies it has come up with per issue, it must have a sound internal environment with institutional structure, leadership, shared values, staff, skills and systems that will ensure it is able to do so.

This section presents an analysis of the Authority's internal environment with the aim of determining the Authority's strengths, weaknesses, opportunities and threats to ensure the proper arrangement of internal resources for effective performance in implementing its strategic plan. Our analysis is prefaced by a high-level overview of the Authority's performance over the past five years, followed by the analysis using the McKensy 7s technique

9.1 ICASA'S PERFORMANCE OVERVIEW (2019/20 – 2023/24)

The Authority's performance over the past five years is dotted by successes and failures, from which it has learnt valuable lessons, which it will take into the MTDP 2024-29 period.

The Authority achieved an average performance of 87.2% over the five-year period against a target of 80% on achieving all its outcomes. However, the Authority could not achieve an annual target of 91%, which it resolved to maintain since it achieved it in 2017/18FY. See the performance of each year in Figure 8 below.

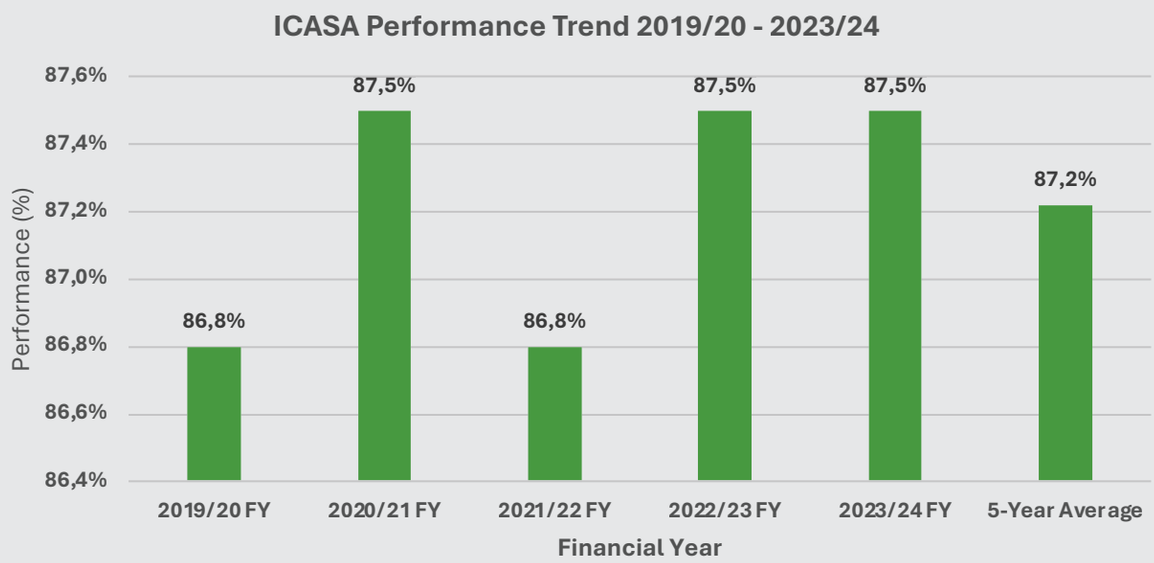


Figure 8: ICASA Performance Trend

The issuing of the high demand spectrum to the industry in 2022 saw the Authority contribute R14.4 billion to the national fiscus.

ICASA continued its drive to ensure compliance by licensees on Universal Service Obligations which requires public service institutions (schools, clinics, hospitals, libraries, traditional offices) nationwide to be connected by those licensees' awarded spectrum through the 2022 spectrum auction process. By 31 March 2025, 50% of these institutions are expected to be connected.

The Authority planned to conduct the second auction of the high demand spectrum in 2023/24FY. However, it could not after receiving legal advice to perform a market assessment study before embarking on the auction. The market study is currently being conducted, and the auction is planned for the 2025/26FY based on the findings of the market study.

The Authority represented the country at different international fora such as the ITU, ATU, APU and CRASA and had interactions with sister regulators including MACRA, BOCRA, ESCOM, TCRA, ZITCA in Africa, to mention a few, for various business reasons of mutual benefit. The Authority also attended the World Radiocommunication Conference 2023 (Dubai, United Arab Emirates, 20 November – 15 December 2023) and adopted the outcomes of the conference and the Authority will be implementing them during the MTDP 2024-2029 period.

In terms of protecting of consumers, the Authority has resolved 890 interference cases across the country from 2019/20 to-date. The fewer the interference cases the better.

Table 10: Interference Cases Resolution within 30 days

2020-2024	Resolved	No. cases Exceed TAT	No. Cases Resolved within TAT[9]	% Resolved within TAT
2019-2020	208	4	204	98,1%
2020-2021	197	1	196	99,5%
2021-2022	199	3	196	98,5%
2022-2023	160	4	156	98%
2023-2024	141	3	138	98%
Total	**905**	**15**	**890**	

The Authority has also resolved 62 468 complaints out of 65 344 that were received from 2019/20 to-date giving a 96% complaints resolution rate.

Table 11: Resolution of Complaints

Aspect	2019/20	2020/21	2021/22	2022/23	2023/24	Total
Percentage	96%	95%	95%	96%	96%	96%
Resolved	7419	11353	13504	15111	15081	62468
Received	7728	11951	14215	15741	15709	65344

Resolution of interference cases and consumer complaints will continue to be done in the MTDP 2024-2029 period.

The Authority also collects revenue on behalf of government. The mandate is derived from section 4(1) ~~(c) of the ECA r~~ead with section 15 of the ICASA Act. To this end, the Authority is duty-bound to ensure

9 Turnaround Time

that all charges and fees levied in respect of licences granted, authorisations issued, and any other activities are collected.

The table below presents the amount of revenue that the Authority collected as of 31 December 2024. The Authority normally collects 99% of the revenue in licence fees over one financial year.

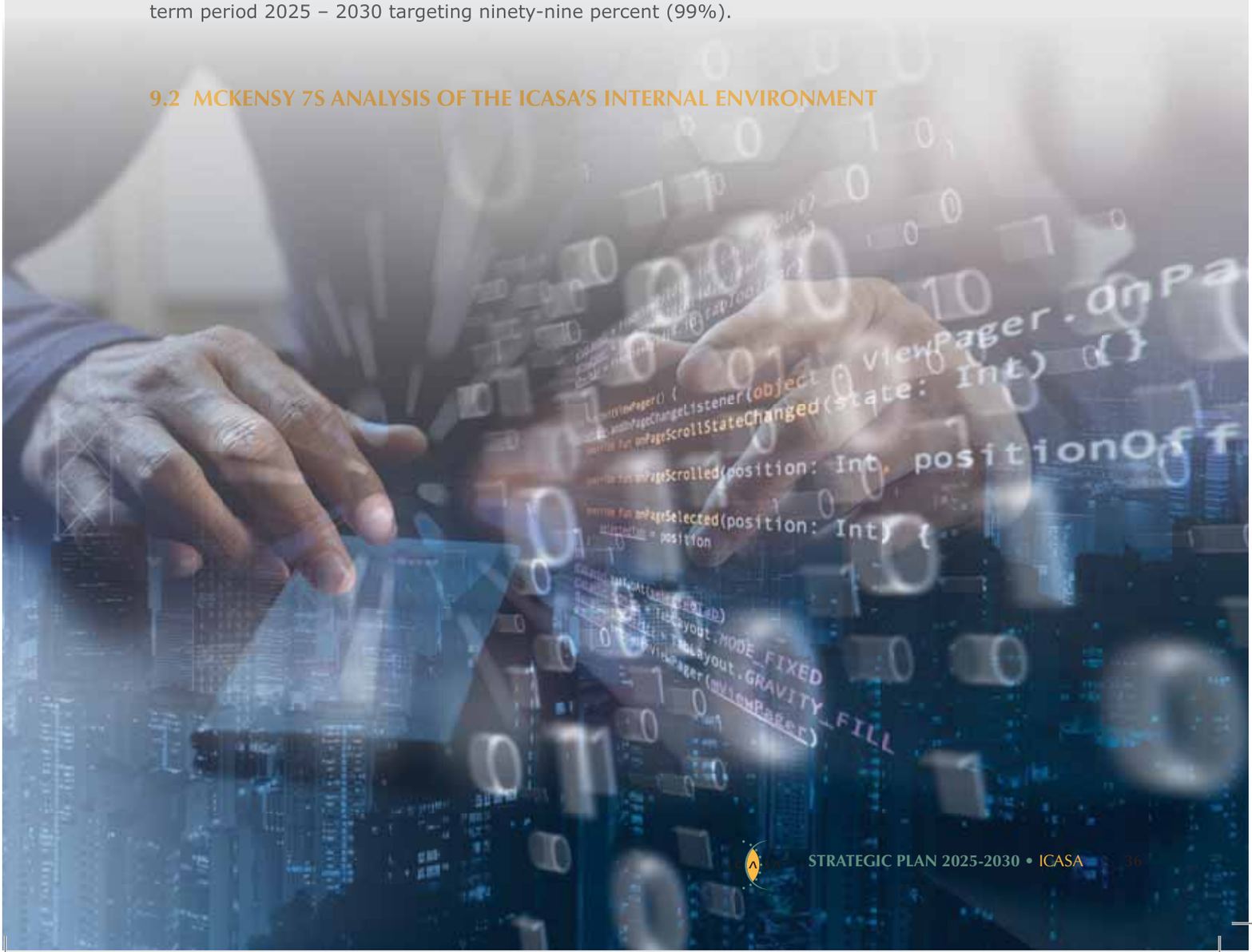
Total Universal Service Access Fund (USAF) revenue collected on behalf of USSASA amounted to R 266 227 433.33. This amount is included in the Authority's total revenue collection at the end of 31 December 2024, and it was paid to the National Revenue Fund in accordance with the ICASA Act. The Authority will continue to collect both license fees revenue and USAF for government over the medium-

Table 12: Government Revenue Collection

Government Revenue Collection 2024/25						
Revenue stream	**Revenue Billing**	**Q1 Collection**	**Q2 Collection**	**Q3 Collection**	**Total Collection Q3**	**Percentage**
Spectrum	1,145,188,181.33	806,879,682.03	172,767,423.83	49,354,452.63	1,029,001,558.49	90%
ECS/ECNS	877,968,594.20	224,924,397.15	590,502,156.26	55,130,236.76	870,556,790.17	99%
Broadcasting	107,630,889.46	249,088.27	9,281,464.69	94,793,562.28	104,324,115.24	97%
Postal	44,127,268.02	10,469,776.06	61,380.98	16,655.00	10,547,812.04	24%
Totals	**2,174,914,933.01**	**1,042,522,943.51**	**772,612,425.76**	**199,294,906.67**	**2,014,430,275.94**	**93%**

term period 2025 – 2030 targeting ninety-nine percent (99%).

9.2 MCKENSY 7S ANALYSIS OF THE ICASA'S INTERNAL ENVIRONMENT



The Authority's internal environment was analysed through a workshop session with Council and all the Authority's Programmes, using the McKensy's 7s[10] framework and the SWOT Analysis techniques.

The McKensy 7s framework is depicted in Figure 9 below.

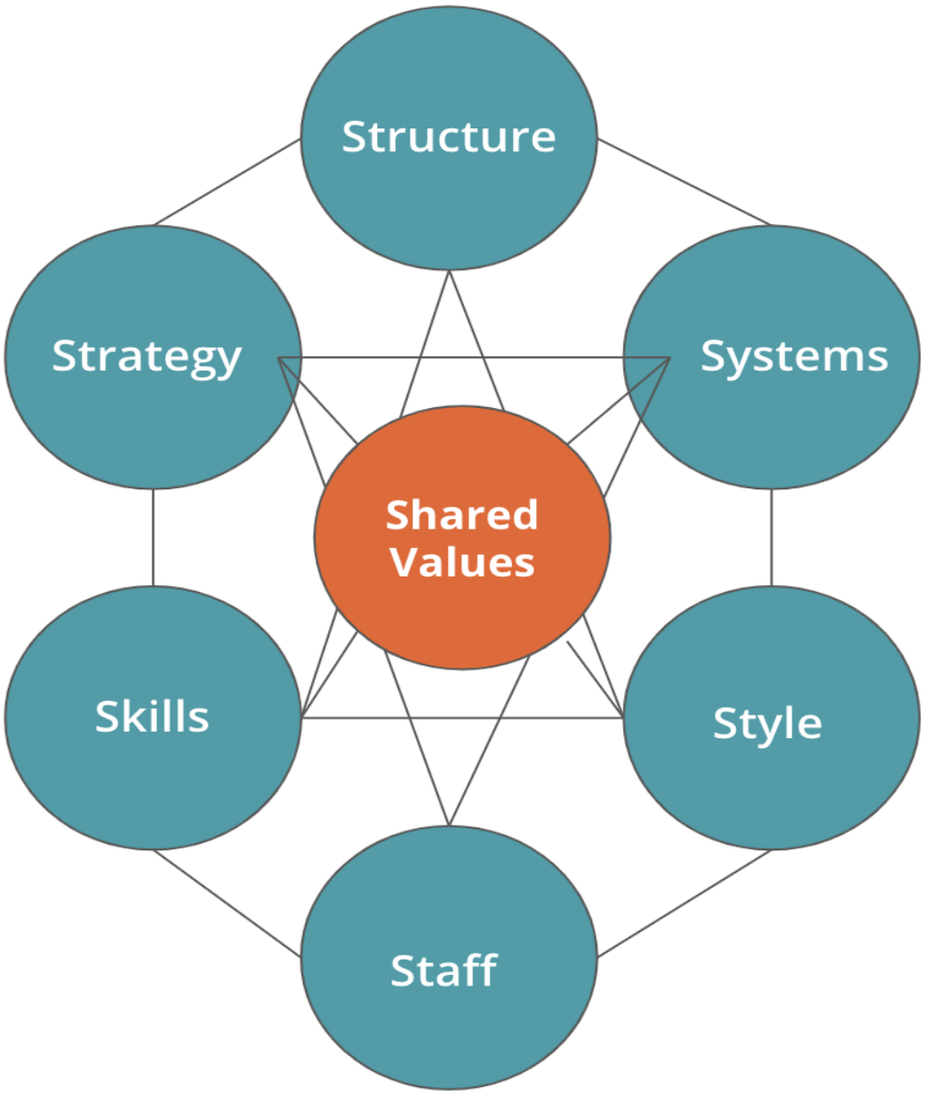


Figure 9: MicKinsey 7s Model

10 **McKinsey 7s model** is a tool that analyses company's organizational design by looking at 7 key internal elements: strategy, structure, systems, shared values, style, staff and skills, to identify if they are effectively aligned and allow the organization to achieve its objectives.

STRATEGY

The Authority will complete the implementation of its Strategic plan 2019 – 2024 by the end of March 2025. The Authority's strategy for the 2025/30 medium-term planning period should be a compendium of its targeted beneficiaries' needs as determined in its performance environment analysis, its sustained agenda (mandate), and the change agenda (developmental policies of the government of the day).

Strengths for the Authority to implement its strategy lie in its constitutional mandate, which gives it the unique status of an entity that is a creature of statutes. The Authority's strength also lies in the support it enjoys from the Ministry and the Department of Communications and Digital Technologies in terms of policy direction. Affiliation to international bodies in the communications sector such as ITU, APU, ATU, CRASA, technology companies around the world and sister regulators further emboldens the Authority's ability to implement its strategy. Associations and pressure groups that keep the Authority on its toes further spur it on to implement its strategy robustly.

Weaknesses that impinge on the Authority's ability to implement its strategy effectively can be grouped into those that are a result of it being an entity of government. They include legislative challenges such as the Act on which the Authority is based, which requires amendment in view of the technological changes that are proliferating within the international communications sector. Furthermore, there are often delays in receiving policy directions and directives, which result in the slow pace of implementation.

The South African communications sector is a heavily contested terrain by its key players. As a result, the Authority always finds itself in litigations as different parties make moves to maximise the gains they derive from the communications sector. The Authority has had to deal with numerous litigations in the past few years, and it does not look like they will be abating soon. Thus, the Authority must always set aside part of its allocated funds for litigation purposes, a scenario which is least preferable.

The strengths outlined above arm the Authority with tools to continue in implementing its strategy 2030 over the medium-term period. The weaknesses identified present an opportunity for the Authority to come up with tactics to ensure its strategy 2030 is implemented successfully.

STRUCTURE

The Authority is led by a Council, with members (councillors) serving fixed terms of four years as per the ICASA Act. The Chairperson has a term of five years. The Executive Council is supported by three governance committees: the Audit Risk Ethics and Disclosure Committee, the IT & Risk Committee, and the Remuneration & Human Resources Committee, which together form the Authority's governance structure.

The Authority has a Chief Executive Officer who is head of administration as per the ICASA Act. The Chief Executive Officer is supported by an Executive Committee comprised of heads of Programmes with the legislated officials for compliance with the PFMA being CFO, CAE, Senior Manager: Strategy & Programme Manager and Risk & Compliance Specialist.

The strength of the structure is that it is based on the Authority's founding legislation, the ICASA Act of 2000. The structure is funded through funds allocated through the Act of Parliament. There is a clear hierarchy and reporting lines.

With changes in the performance environment of the Authority, the current structure, which was established in 2014 and revised in 2022, is beginning to show some weaknesses in terms of responding to the requirements of the Authority's work. There is ambiguity in terms of some roles and responsibilities, there are bottlenecks in decision-making processes. There is poor communication flow, resistance to change in certain areas, and insufficient resources for the structure to be fully functional.

The weaknesses present opportunities for betterment and improvement such as partnerships and collaborations. Another opportunity is presented by the current new strategic plan 2030

being developed which must be implemented through a commensurate organisational structure. Thus, a new organisational structure accompanying strategic plan ought to be developed.

STAFF

The Authority's organisational structure comprises of 471 approved positions, of which 341 are currently occupied. The figure includes a complement of five Councillors out of an expected nine Councillors. The situation is bred by the fact that Parliament is currently in the process of finalising the appointment of four more Councillors, which must take the total number to nine. The Authority is not recruiting for 106 positions due to inadequate funding. 24 posts that are budgeted remain vacant, the recruitment process to fill those vacancies is currently underway. This results in a vacancy rate of 5.1%. The Authority has managed to maintain the vacancy rate below 7% for the past three years, reflecting its proactive approach towards workforce management.

EMPLOYMENT EQUITY

The table below presents the Authority's employment equity status as of 31 December 2024 against South Africa's economically active population.

Currently, the Authority's headcount displays a few deviations from the targeted EAP of South Africa. The most notable shortcomings lie in the representation of White Females shortfall of (41% n=6) and Coloured Females with a shortfall of (40% n=6). While the Authority is above its target for African Females, this group remains underrepresented at the Professional Level.

To address the disparities, the Authority will implement strategic measures to recruit White Females and Coloured Females and foster the development of African Females, ensuring their progression to professional positions over time.

It is expected that Parliament will finalise the appointment of an additional four Councillors in the first quarter of 2025/26FY to put the Authority in good stead to implement this strategic plan 2030.

SKILLS

Certainty of a requisite set of skills to ensure the implementation of the Authority's work amidst a rapidly changing environment is crucial. To this end, skill development is a critical component of the Authority's strategic focus. As the landscape of technology continues to evolve rapidly, the Authority recognises the importance of staying abreast of the latest advancements. By investing in employee skill sets to refresh expertise, the

EMPLOYMENT EQUITY STATISTICS **AS AT 31 December 2024**

ICASA NUMBER OF EMPLOYEES VS. Economically Active Population of SA (2018)

Race Gender	Actual #	Ideal No. based on EAP#	EAP% 2018	VARIANCE
African Female	144	122	35.8%	18%
African Male	136	146	42.7%	-7%
Coloured Female	9	15	4.4%	-40%
Coloured Male	14	18	5.2%	-21%
Indian Female	6	4	1.1%	60%
Indian Male	6	6	1.7%	4%
White Female	8	14	4.0%	-41%
White Male	14	17	5.1%	-19%
Foreign National	4			
Total	**341**			

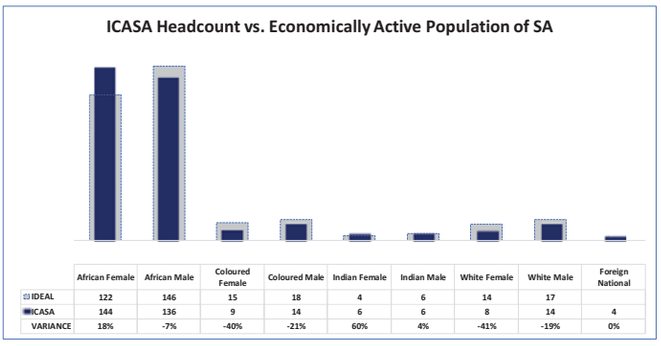


Figure 10: ICASA Employment Equity Status

Authority ensures that its workforce remains agile, adaptable and ready to tackle the challenges of a perpetually changing technological environment.

Digitalisation is at the core of the global changes that are happening around the world. It makes certain skills obsolete and introduces new ones that require employees' staff to be trained or re-trained.

The schema below shows the Authority's expenditure on short-term training.

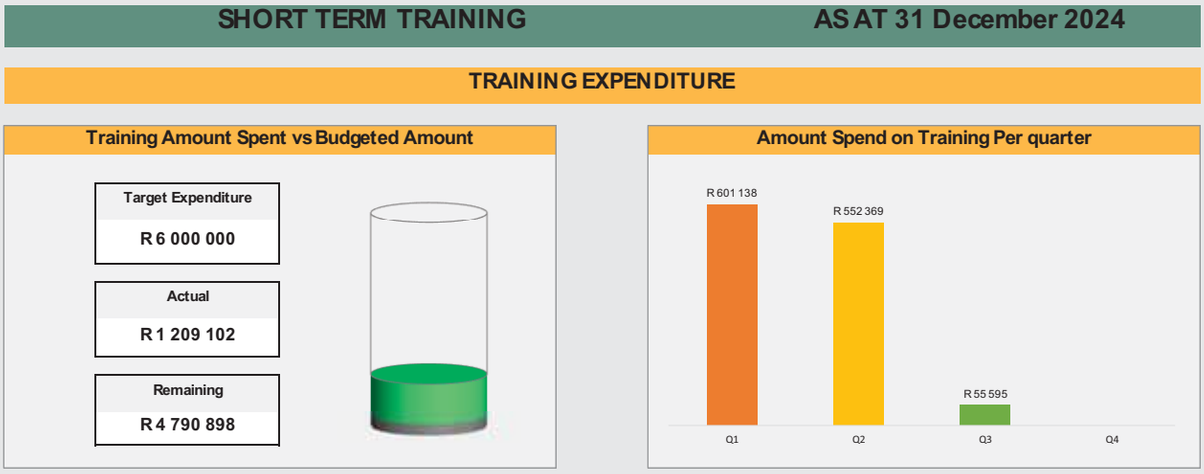


Figure 11: Short-Term Training Expenditure

The Authority also runs a bursary scheme, which allows staff to undertake long-term training to strengthen their career paths or start new ones in line with the Authority's long-term goals.

The Report of the Presidential Commission on the 4th Industrial Revolution for South Africa has noted that *"A human capacity strategy needs to focus on the future areas of work while strengthening current sectors for maximum job retention, job creation and a transition from the current to future -ready scenarios[11]."*

Further, The Implementation Guide for the National Digital and Future Skills Strategy for South Africa[12] makes the point as follows: *"Digital and future skills are a vital component of South Africa's human resource capacity growth path, without which it cannot renew its economic sectors, government and social sectors."*

The two preceding statements interweave the weaknesses, opportunities, and threats the Authority must contend with.

STYLE

The Authority`s consultative leadership style provides a unique platform for its employees and the general national communications landscape sector and further enhances collaboration.

The leadership of the Authority gains key strength from the Ministry and Department of Communications and Digital Technoloqies on alignment with government policies. Furthermore, the Authority has recently welcomed a new chairperson who will be with the Authority for the next five years meaning he will be with the Authority for 4 years of implementation of this strategic plan.

Several weaknesses are acknowledged around leadership at different levels, such as resistance to change or inflexibility, lack of delegation or micromanagement, poor conflict resolution skills and insufficient feedback mechanisms.

11 Report of the Presidential Commission on the 4th Industrial Revolution as ppublished in Government Gazette No. 43834 dated, 23 October 2020, page,158.

12 The Implementation Guide for the National Digital and Future Skills Strategy for South Africa, page 8.

The Authority is also alive to threats such as staff turnover due to dissatisfaction with leadership, changes in market or industry that necessitate rapid shifts in leadership style. Negative perception of leadership affecting organisational reputation and resistance from leaders to adapt to new methodologies or technologies.

Staff recognition matters are continuously improved, and silo approaches are discouraged. This will be continued going into the implementation of the strategic plan. The development of a leadership framework is being considered, and this will address other areas such as succession planning.

To hone the leadership posture on the organisation going forward, collection of qualitative and quantitative data on leadership performance and organisational culture assessment will be done. Gauging of the employees' perspectives on leadership will also be done.

SHARED VALUES

Shared values within the Authority include norms and behaviours that are expected from all staff members. They are provided for in the ICASA guidelines, and employees are required to familiarize themselves with them before commencing their employment at the Authority.

The current organisational shared values were introduced in 2014 when the organisation went through a restructuring process, and they have remained in force since then to-date. During the situational analysis process, it was felt that they needed revamping. As a result, the suggestion to use the letters in the name of the Authority as a guide to come with the shared values was adopted as below.

I Innovative
C Collaborative
A Accountable
S Stakeholder-centric
A Action-orientated

The past shared values and the current ones which have been adopted' s strength is that they give the Authority a reputation for integrity that has increased customer trust in the Authority, and which will continue to do so over the years.

In the main, the Authority's staff practice aligned with its past stated shared values. However, there are some behaviours that showed weaknesses, where there was contradiction to the established shared values, which led to disillusionment among some employees who observed them. Pockets of resistance were also picked up where identification of strong shared values led to rigidity or resistance in adopting to the ideas or changes in the Authority's performance environment. The Authority will implement tactics such as promotion of the shared values throughout operations, decision-making processes, and employee engagement initiatives.

With the identified strengths, there are market differentiation opportunities where the shared values can be used for marketing and branding purposes. There is also opportunity to attract talent that resonates with the Authority's values. Also, they can open doors to strategic partnerships and collaborations with like-minded organisations.

Threats such as cultural misalignment with regulators in the country or with Ministry and Department of Communications and Digital Technologies may create conflicts. There may be backlash if the Authority's practice does not align with its shared values. There is also a possibility of poor alignment of the shared values at operational level leading to higher turnover rates among staff who feel disconnected to from the Authority's shared values.

The end goal is to ensure that the Authority's employees live the shared values to improve its corporate culture.

SYSTEMS

There are various systems that the Authority relies on to implement policies and run day-to-day operations, such as the legislative and regulatory framework, employee management system, records management, Human Resources

recruitment system, project management system and financial systems. It is essential to highlight that some of these systems improve the efficiency of the business if they can be integrated.

The legislative and regulatory framework is matured and formulated by the public. The Authority is committed to reviewing regulations every five years to ensure that their purposes remain relevant and aligned with the changes in the ICT sector.

The strategic system at the core of the Authority's mandate is the Automated Spectrum Management System, which enables the regulator to receive and process applications and draw data to retrieve information critical to its effort to do spectrum planning. Since transitioning from the manual processing of applications to an automated system, the Authority has noted the poor performance of the ASMS. In this strategic cycle, the Authority intends to retire the system and introduce an improved system that can be sourced from the shelves, tested and used competently in various markets.

Another critical system identified is the spectrum monitoring system, which needs to be improved to cater to the needs of the public to receive quality telecommunication and broadcasting services. Detailed analyses of various systems are presented in the table below based on their strengths, weaknesses, opportunities, and threats. A decision column on the right hand-side gives some of the possible solutions that the Authority plans to implement to deal with the weaknesses and threats and apply its strengths to taken advantage of the opportunities.

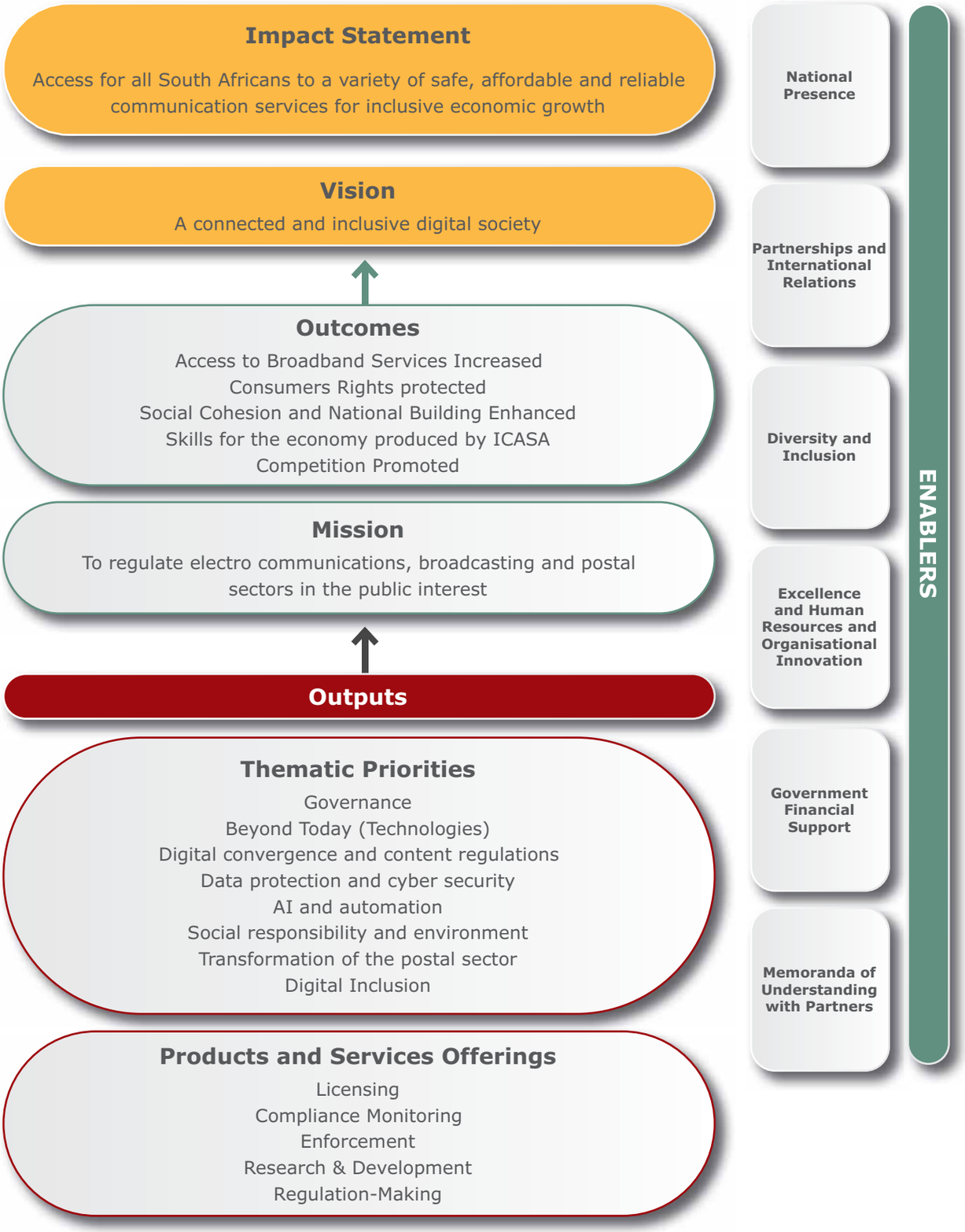
Table 13: SWOT Analysis

Systems	Strength	Weakness	Opportunity	Threat	Decision
Regulatory Impact Assessment System	A comprehensive approach to assessing economic and market impacts, leading to informed decisions.	Time-consuming data collection and stakeholder engagement process -may delay decision-making.	Improve efficiency using automated data collection and analytics tools.	Evolving market conditions may require more frequent assessments, adding pressure to the system.	Invest in automated data analysis tools and develop real-time market monitoring to reduce time lags and adapt quickly to market changes.
	Detailed cost-benefit analysis offers transparency and credibility in regulatory actions.	No ex-ante regulatory impact assessment. Limited flexibility in adapting to unexpected or rapid policy changes. Lack of skills in software use	Expansion to incorporate real-time data analysis for proactive decision-making. Training of staff	Consistent or complete data from stakeholders may maintain the accuracy of assessments.	Enhance stakeholder engagement processes and build a flexible framework for real-time data updates to improve responsiveness. Do post-ante regulatory impact assessment. Applicable to other regulatory processes in other divisions.

Systems	Strength	Weakness	Opportunity	Threat	Decision
Automatic Spectrum Management System (ASMS)	ASMS – No strengths were identified for the ASMSs other than recognising its intention.	a) ASMS - Not fully functional (broadcasting module not onboard), b) ASMS - No proper reporting functionality and related requirements, c) ASMS - inability to re-calibrate the system, d) ASMS - picking system errors after procurement. e) ASMS - unreliability of the system, f) ASMS - no penalties for system's poor performance/ delivery, g) ASMS - Budget, SCM, Spec, Skills. h) ASMS - System not delivering optimally, system has outlived its usefulness/ lifespan, i) ASMS - lack of proper project management, change management.	Review and resolve system for short to medium - consider Spectrum Management System developed by ITU, for Developing Countries – ICASA can get a licence for it.	Loss of revenue and reputational damage to the Authority.	Replace entire system (consider international service provider).
Spectrum Monitoring System to ensure Quality of Service and experience	Quality of service – Unit established and functional (drive-by tests)	Quality of service – System capability limited, manual data loading onto the server,	Quality of service – Real-time data loading, system to interface with Licensees' systems, review and amend Regulations, benchmark against other countries on the continent (do away with drive-by tests).	Quality of service – Integrity and reliability of data from drive-by tests.	Quality of service – Authority to consider having its own network, upgrade its own systems, procure multimodular system.
CRM	CRM – Not applicable	-	-	-	-

Systems	Strength	Weakness	Opportunity	Threat	Decision
LogRhythm/ Usecure/ Nessus/Trellix/ ePurifier	Automated real-time detection. Leverage of Expertise of Vendors	Reliance on external service providers non-integration	Consolidation / Integration/Skill transfer	Non-compliance compliance with relevant legislation	Adoption of systems that can integrate all processes. All-in-one.
Acronyms	Cloud-based architecture. Eliminates the need for physical Disaster Recovery sites. Leverage of Expertise of Vendors	Reliance on external service providers	Skills transfer	Non-compliance compliance with relevant legislation Cyber security	Recruitment of skilled Personnel
Assurance and consulting services – Team Mate. Issue Tracking – Team Mate	Use a risk-based approach. Assure the governance, risk management and internal control processes Team Mate – follow global standard/ best practice	Team Mate requires continuous system updates and upgrades.	Review and consider other similar risk and internal audit system	Vulnerable to cyber attacks	Harmonise IA systems
Supply Chain Management System	The SCM Process is in place for procurement in general.	Manual-based system. The system is not fully compliant with Treasury Regulations.	Procure new system	Fruitless and wasteful Expenditure leading to no clean Audit.	Review and overhaul the current system to automate and make it accessible online.

Based on the situational analysis done, the Authority's strategic focus will be in areas that are depicted in the ICASA Strategic Plan 2025–30 Strategic Framework below as thematic priorities.



PART C

MEASURING OUR PERFORMANCE

Performance of the Authority shall be measured against the impact it intends to make as per its impact statement and outcomes below.

10. INSTITUTIONAL PERFORMANCE INFORMATION

10.1 IMPACT STATEMENT

Access for all South Africans to a variety of safe, affordable and reliable communication services for inclusive economic growth

10.2 OUTCOMES

Outcome	Outcome Indicator	Baseline	Target
MTDP Strategic Priority 1: Inclusive growth and job creation			
Access to broadband services increased	Average Download Speed	45Mbps	95Mbps
MTDP Strategic Priority 2: Reduce poverty and tackle the high cost of living			
Social Cohesion and Nation Building enhanced	Percentage enhancement of status of Social Cohesion and Nation Building	50%	100%
MTDP Strategic Priority 1: Inclusive growth and job creation			
Competition promoted	Number of pro-competitive regulatory interventions	15	30
MTDP Strategic Priority 2: Reduce poverty and tackle the high cost of living			
Consumers Protected	Level of Consumer Rights Protected	5	10
MTDP Strategic Priority 2: Reduce poverty and tackle the high cost of living			
Skills for the economy produced in ICASA	Number of skills for the economy produced in ICASA	-	50

10.3 EXPLANATION OF PLANNED PERFORMANCE OVER THE FIVE-YEAR PLANNING PERIOD

Performance of the Authority must contribute to the higher order plans of government including the Medium-Term Development Plan 2024 – 2029 and NDP 2030. There must be a clear line of sight between the results of the strategic plan of the Authority and the results of the higher-level plans in terms of positive contribution.

THEORY OF CHANGE[13]

NDP2030

By 2030, ICT will underpin the development of a dynamic information society and knowledge economy that is more inclusive and prosperous. A seamless inofrmation infrastructure will meet the needs of the citizens, business and the public sector, providing access to a wide range of services required for effective social and economic participation – at a cost and quality at least equal to South Africa's competitors.

MTDP 2024-29

Strategic Priority 1: Inclusive growth and job creation

Outcome: Science, technology and innovation for growth

Invest in digital identity and payments, expand access to affordable broadband, and increase training for young people in digital skills.

Strategic Priority 2: Reduce Poverty and tackle the high cost of living

Outcome: Social Cohesion and National Building

Promote and protect South Africa's diverse languages and cultures.

Promote the rights of women, youth, children and persons with disabilities and remove the social, economic, cultural and other barriers to full participation in the economy.

Strategic Priority 3: A capable, ethical and developmental state.

Outcome: Effective border management and development in Africa

Promote peace, security, democracy and socioeconomic development in SADC and other parts of the continent. Strengthen the AU Peace and Security and Governance architecture. Increase the voice of developing countries in the UN and other multilateral institutions, promoting peace, security and development, South-South and North-South cooperation through BRICS, the G20, the Non-Aligned Movement and other forums.

Annual Operational Plan 2025/26FY

Annual Performance Plan 2025/26FY

Strategic Plan 2025-30

INPUTS	KEY ACTIVITIES	KEY OUTPUTS	OUTCOMES	IMPACT STATEMENT
Human Capital (Staff Complement) Financial Capital (Annual Allocation of Funds) Partner Agencies	Assign broadband spectrum Develop saterlite regulatory framework Implement IMT roadmap Monitor quality of service Develop Rapid Deployment Regulations Procure from women, youth and persons with disabilties companies Facilitate international engagements Resolve consumer complaints Develop signal distribution regualtions Implement IT strategy License community sound broadcasting	Broadband spectrum assignment completed Saterlite regulatory framework completed IMT roadmap implemented Quality of Service Monitored Regulations on Rapid Deployment Women, youth and persons with disabilities companies benefiting from procurement International engagements facilitated Consumer complaints resolved Signal distribution regulations IT strategy implemented Community sound broadcasting licensed	Broadband Services Increased Competition Promoted Social Cohesion and Nation Buidling Enhanced Digiital Skills Produced by iCASA Consumer Rights Protected	Access for all South Africans to a variety of safe, affordable and reliable communication services for inclusive economic growth

Assumptions

Continued availability of allocated resources, Positive Dependencies sustain and negative ones do not materialise in executing activities, Identified output and outcome risks do not materialise. Overall, the performance environment does not change drastically and government policy remains unchanged.

Figure 12: Theory of Change

13 Outputs are specified in the APP2025/26FY. Activities are specified in the OPP2025/26FY.

The theory of change graph above depicts the interlinkages between planned results from the Authority's strategic plan to the higher-level national plans.

ACCESS TO BROADBAND SERVICES INCREASED

Broadband is defined as high-speed, switched, broadband telecommunications capability that enables users to originate and receive high-quality voice, data, graphics, and video telecommunications using any technology. It is usually defined as 25Mbps or faster. There are four major types of broadband internet: cable, DSL, fiber and satellite.

At country level, broadband is understood within the context of it being an enabler for socio-economic growth. Thus, broadband must reach a critical mass of South Africans; access to broadband must be affordable; demand-side skills must be developed so broadband services can be used effectively; and supply-side skills must be developed so that the economic and innovative potential of broadband can be exploited (SA Connect 2013). Government's target speeds in terms of access to broadband services is download speed of 100Mbps by 2030.

According to Ookla's H2 2024 Connectivity Report, median mobile download speeds for major South African cities is as shown in the table below.

Table 14: Download Speed by City

City	Download Speed
Pretoria	76.03 Mbps
Bloemfontein	69.02 Mbps
Johannesburg	62.55 Mbps
Cape Town	56.49 Mbps
Durban	44.24 Mbps
Pietermaritzburg	46.33 Mbps

The national coverage for 3G networks has reached an impressive 99.79%, while 4G/LTE coverage stands at 99.07%.

Despite the coverage, the Authority intends to improve average download speeds of the mobile users to align with its peers. In terms of the mobile broadband speed ranking by OOKLA's Speedtest Intelligence, South Africa holds the 53rd position out of 146 countries, with a download speed of 47.95 Mbps (ICASA ICT Sector Report 2024).

In the medium-term period, the Authority is aiming to assign the additional International Mobile Telecommunication (IMT) Spectrum Bands which will increase the assigned bandwidth to 386 MHz. The assignment of this additional radio frequency spectrum will substantially contribute to the increase in the average download speeds of users.

The increased average download speeds will be enabled also by IMT advanced systems which provide the next generation of global wireless broadband communications using a wide range of packet-based telecommunication services supported by mobile and fixed-networks. In addition to that, the capabilities of IMT-2020 systems surpass those of IMT advanced in terms of user experience data rates that will be available ubiquitously across the coverage area. The Authority has been involved in the identification of IMT 2020 bands for World Radiocommunication Conference 2023. Upon identification of these bands, the Authority will prepare IMT2020 bands for assignment thus adding to the increased average download speeds.

The rationale for the choice of the outcome indicator is primarily informed by the need to (a) give effect to the regulatory measures required by the ICT sector to give effect to the short- and medium-term economic interventions to stimulate the growth of the economy, (b) that the ranking of South Africa improves relative to its peers in terms of download speeds, (c) reduction of cost to communicate, especially data cost.

The Authority set a target of 50Mbps download speed by the end of the 2019 – 2024 Medium-Term Strategic Framework period. It managed to achieve 45Mbps which becomes the baseline against the set target of 95Mbps by 2030.

In terms of the theory of change, increased broadband services will lead to inclusive growth and job creation as stated in the MTDP 24-29 by boosting local economies by enabling businesses to reach new markets, streamline operations, and improve efficiency. This, in turn, creates jobs and stimulates economic development and lead to access for all South Africans to a variety of safe, affordable and reliable communication services for inclusive economic growth as per the Authority's impact statement and lead to a wide range of communication services as per the NDP 2030. Overall, broadband services are a fundamental component of modern infrastructure, driving benefits across various sectors and improving quality of life for many.

STATUS OF SOCIAL COHESION AND NATIONAL BUILDING ENHANCED

As stated above, the constitutional protection that the Authority enjoins by virtue of section 192 of the Constitution is premised on it being established as an independent regulatory institution to regulate broadcasting in the public interest and to ensure fairness and a diversity of views broadly representing South Africa firmed by the Constitutional Court in Electronic Media Network Limited and Others v Etv (Pty) Limited and Others reporting or a biased or inexcusable exclusion of some views happens, it is to ICASA that any aggrieved party may turn to lodge a complaint for possible intervention.

The Authority is also constitutionally enjoined to level the broadcasting playing-field so that a diversity of views that broadly reflects the thinking of South African people, as opposed to one-sided propaganda-like narratives, may find expression (own emphasis).

In light of the above, the rationale for the choice of the outcome indicator is premised on the need to ensure that the Authority fulfils its mandate of ensuring the development of public, commercial and community broadcasting services which are responsive to the needs of the public; protect integrity and viability of public broadcasting services and ensure that commercial and community broadcasting services are controlled by persons or and groups from a diverse range of communities in the Republic.

From a theory of change perspective, enhancing of social cohesion and nation building will reduce poverty and tackle the high cost of living as per Priority 2 of the MTDP 2024-29 because strong social cohesion fosters understanding and respect among different groups, reducing the likelihood of conflict and violence. Increased collaboration will lead to collaboration among businesses leading to innovation and economic growth. Strong social ties and stable environments are more attractive to investors, boosting economic opportunities. At the NDP2030 level, this will lead to an improved standing of living.

CONSUMER RIGHTS PROTECTION

Protection of consumer rights lies at the core of the Authority. It is established to:

- regulate broadcasting in the public interest
- regulate electronic communications in the public interest
- regulating postal matters in the public interest

A fundamental constituent of the public in this regard is the consumer of the services across the three subsectors regulated by the Authority (broadcasting, electronic communications and postal services).

More importantly, it is worth noting that the execution and fulfilment of the mandate of the Authority is for the benefit of the broader public and consumers. For example, regulatory interventions to lower cost to communicate (under the outcome pertaining to promotion of competition in the ICT sector), increase of broadband speeds from 20.35 to 50 Mbps (under the outcome pertaining to increased access to quality broadband services) or licensing of additional community television broadcasting services (under the outcome pertaining to enhancement of social cohesion) are all ultimately meant for the benefit of the public (i.e. consumers).

As such, it is the Authority's responsibility to ensure that once it has implemented measures to lower cost to communicate, increased broadband speeds and or enhanced social cohesion those measures are implemented for the benefit of consumers; and that where they are not implemented or complied with, the Authority intervenes to enforce compliance and implementation for the benefit and protection of consumers.

Finally, as a public entity, protecting consumers and serving of the public interest lies at the heart of the Authority for the establishment of an efficient, effective and development-oriented public service to ensure an empowered, fair and inclusive citizenship.

Protection of consumers in the ICT sector will lead to achievement of MTDP Strategic Priority 2: Reduce poverty and tackle the high cost of living. This will happen as the Authority protects consumers from malpractices among communication services providers. Robust consumer protection in the ICT sector not only safeguards individual rights but also fosters a more equitable, innovative and secure digital ecosystem. This ultimately benefits consumers, businesses and the economy.

PROMOTION OF COMPETITION

As stated above, promotion of competition is central to the Authority. The courts have confirmed that despite the existence of an overarching competition regulator, the Authority retains the primary mandate to ensure that there is competition in the ICT sector in terms of the ECA. As stated by the court in the Telkom SA SOC Limited v ICASA:

"the statutory obligation to promote competition within the ICT sector implies an obligation to also consider and take into account competition which is part of the decision-making process and cannot be delegated decision to defer to another organ of state. ICASA's failure to do so and its decision to defer to the Competition Commission were both, in my view, wrong in law".

The ECA specifically lists as one of its objectives (under section 2(f)) the promotion of competition in the ICT sector. Further, it also lists objectives pertaining to encouraging investment (including strategic infrastructure investment); promoting an environment of open, fair and non-discriminatory access to services and networks; developing SMMEs and refraining from undue interference in commercial affairs of licensees all of which require a competitive sector to be realised.

The outcome indicator on pro-competitive regulatory measures is central to the Authority's contribution to government Priority Outcome 4 and Outcome 6 as well as NDP milestone 4 and 12:

- Outcome 4: as stated in the 2019 NT Policy Paper, the meaningful effects of the various regulatory interventions to promote competition in the ICT sector will result in significant efficiencies and capital deepening that are critical for the stimulation of the economy.

- Outcome 6: the conduct of various market reviews under this outcome indicator is critical to address the bottlenecks in various market and market segments to ensure effective competition.
- Milestone 4: the proposed licensing of an Individual Electronic Communications Network Service Licensee for the purposes of providing Wireless Open Access Network services under this outcome indicator is aimed at facilitating investment in the factor and in particular, strategic infrastructure investment.
- Milestone 12: the regulatory measures implemented under this outcome indicator are aimed at ensuring the availability of services (particularly broadband services) at competitive prices.

Promotion of competition will lead to inclusive growth and job creation through improved services, lower prices, innovation, foster entrepreneurship, creating jobs and attracting foreign investors. At NDP level, there will be digital inclusion as competition bridges digital divide by promoting services that cater to different income levels and demographics, facilitating broader internet access and usage. Ultimately, it can create a more dynamic, efficient, and consumer-friendly marketplace, benefiting both businesses and society.

SKILLS FOR THE ECONOMY

The most effective and sustainable way to build an economy is to equip people with the skills and know-how to drive it.

The National Skills Development Plan (NSDP) 2030 remains the guiding plan in terms of skills development in the country. The NSDP aims to ensure that South Africa has enough people with adequate, appropriate and high-quality skills. These skills should contribute towards economic growth, employment creation and social development within South Africa.

According to the president State of the Nation Address 2025, GNU will be strengthening the connection between the skills we develop and the skills the workplace needs, to ensure we capacitate people with relevant skills to enter the job market with confidence. The Authority's contribution will be in the production of digital skills for the economy. This will be done through training of the Authority's employees in different skills that are required in a digital economy.

11. KEY RISK AND MITIGATION MEASURES

Outcomes	Key Risks	Mitigation Measures
Access to Broadband Increased Skills for the economy produced in ICASA	• Potential delays in Licensing of services due to litigation by stakeholders which may also delay Licensing of IMT Spectrum	• Adherence to processes and legislative framework and where there is ambiguity, obtain legal opinion.
Social cohesion and nation-building Rights of Consumers Protected	• Non-adherence by licensees to licence terms and conditions and regulatory requirements	• Adherence to Process and Procedures
Competition in the ICT sector promoted	• Delays to achieve regulatory set targets due to inadequate funding and continuous reductions in MTEF allocations	• Funding model committee established
	• Averse outcomes of AI technologies	• Develop the code of conduct for the use of customer service point
	• Misinformation and disinformation	
	• Unclear and changing digital goals	• Constant monitoring and ensuring of adherence to set goals

12. PUBLIC ENTITIES

Not applicable.

PART D

TECHNICAL INDICATOR DESCRIPTIONS

ANNEXURE A: TECHNICAL INDICATOR DESCRIPTIONS

Indicator Title	AVERAGE DOWNLOAD SPEED
Definition	The indicator measures download speeds whilst consuming network data services across different licensees (who provide mobile network services) that have deployed IMT advanced systems and beyond. This indicator will be measured at the end of the MTEF cycle.
Source of Data	Opensignal.com
Method of Calculation/ Assessment	Average user experience in Megabits per second as per State of Mobile Experience report of Opensignal.
Assumptions	More spectrum is released
Disaggregation of Beneficiaries (where applicable)	Women, youth and disabled people have a chance to benefit
Spatial Transformation (where applicable)	Country-wide
Reporting Cycle	Annually
Desired Performance	Improved access to communication services by citizens
Indicator Responsibility	Chief Executive Officer

Indicator Title	PERCENTAGE OF STATUS OF SOCIAL COHESION AND NATION BUILDING ENHANCED
Definition	The indicator measures social cohesion status enhancement (inclusive of Diversity of Views). This indicator will be measured at the end of the MTEF cycle. The outputs for each year will be quantified using the method of calculation articulated below
Source of Data	Outputs delivered by Programmes
Method of Calculation/ Assessment	Number of outputs delivered divided by the number of outputs planned multiplied by 100
Assumptions	Planned Programme outputs delivered
Disaggregation of Beneficiaries (where applicable)	Women, youth and disabled people have an equal chance to benefit
Spatial Transformation (where applicable)	Country-wide
Desired Performance	Annually
Indicator Responsibility	Enhanced level of social cohesion and nation building

Indicator Title	NUMBER OF PRO-COMPETITIVE INTERVENTIONS IMPLEMENTED
Definition	The indicator measures pro-competition interventions implemented by various ICASA programmes.
Source of Data	ICASA programmes interventions implemented
Method of Calculation/ Assessment	Counting
Assumptions	Planned interventions will be implemented successfully

Disaggregation of Beneficiaries (where applicable)	Women, youth and disabled people have an equal chance to benefit.
Spatial Transformation (where applicable)	Country-wide
Desired Performance	Annually
Indicator Responsibility	Competition promoted

Indicator Title	**NUMBER OF SKILLS FOR THE ECONOMY PRODUCED IN ICASA**
Definition	This indicator measures the number of skills that ICASA is going to produce over a 5-year period
Source of Data	ICASA employees and HR Records
Method of Calculation/ Assessment	Counting
Assumptions	That the ICASA skills development programme will be maintained and continue to be implemented.
Disaggregation of Beneficiaries (where applicable)	N/A
Spatial Transformation (where applicable)	N/A
Desired Performance	All the ICASA officials finish the courses they attend
Indicator Responsibility	Executive: Human Resources

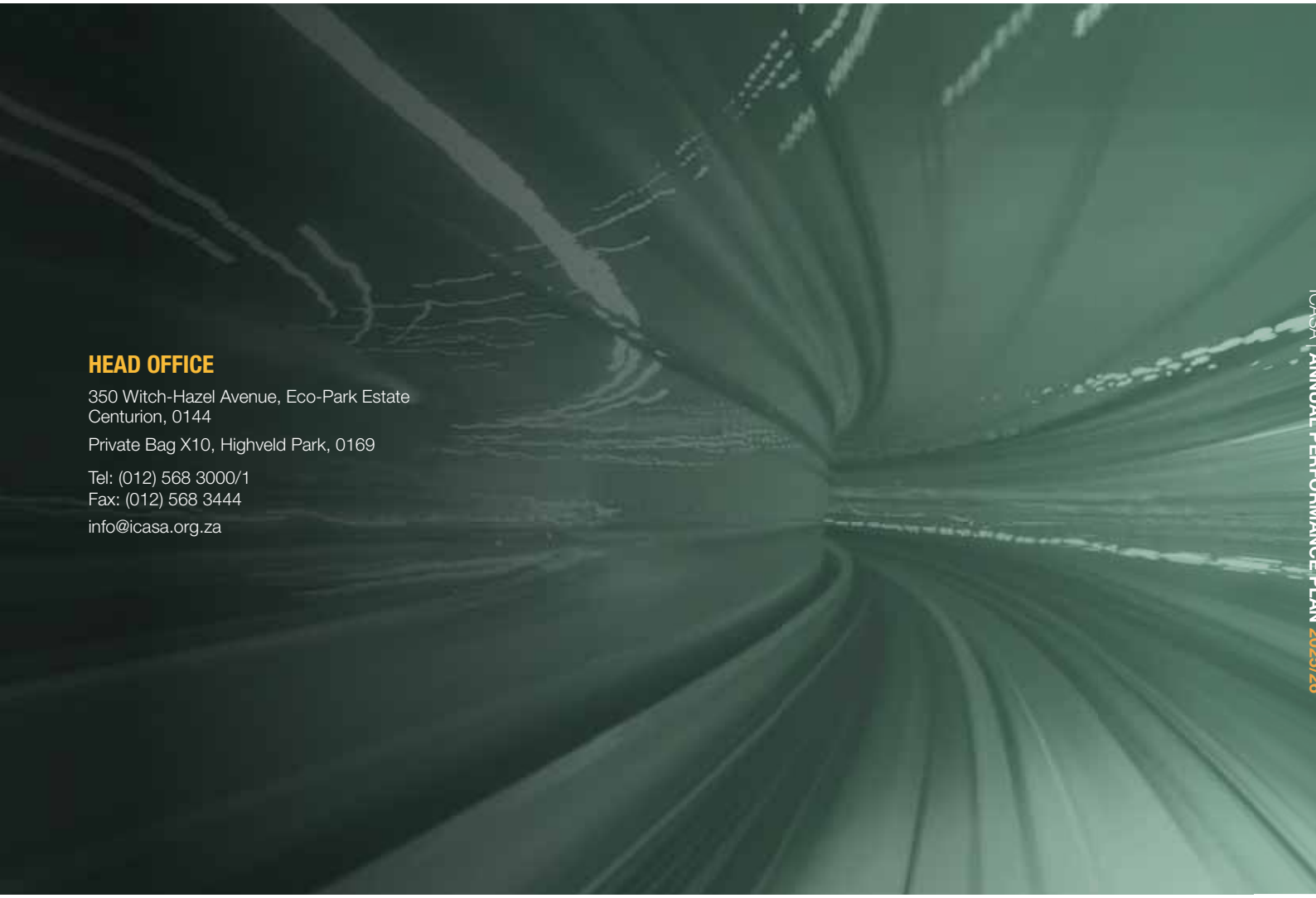
Indicator Title	**LEVEL OF RIGHTS OF CONSUMERS PROTECTED**
Definition	The indicator measures consumer rights protection in terms of levels. The levels are explained below. **Level 1:** 86% of consumer complaints resolved one advisory from CAP 96% of reported Radio Frequency interference cases resolved in 30 working days 4 NATJOINTS instructions executed 100 compliance inspections in terms of (and for enforcement of) End-user and subscriber service charter regulations (ECS/ECNS Licensees) 1825 Compliance Inspections in terms of (and for enforcement of) Regulations on radio apparatus installed at high sites Compliance inspections on Reserved postal services (for enforcement of the South African Post Code of Practice for the South African Postal Industry and Customer Care Standards Regulations applicable to Postal Services Licensees) 300 compliance inspections conducted in terms of Community Broadcasting Services Regulations and Regulations regarding the Standard Terms and Conditions for Class Licenses. The 300 inspections will be targeted at community broadcasting services licensees 2500 compliance inspections in terms of (for enforcement of) Type Approval Regulations 85% implementation of Consumer Education Plan QoS monitoring through Drive testing done for four provinces

Definition (continued)	**Level 2:** 87% consumer complaints resolved one election period monitored one 1 advisory from CAP 97% of reported Radio Frequency interference cases resolved in 30 working days four NATJOINTS instructions executed 105 compliance inspections in terms of (and for enforcement of) End-user and subscriber service charter regulations (ECS/ECNS Licensees) • 1830 Compliance Inspections in terms of (and for enforcement of) Regulations on radio apparatus installed at high sites • 405 Compliance inspections on Reserved postal services (for enforcement of the South African Post Code of Practice for the South African Postal Industry and Customer Care Standards Regulations applicable to Postal Services Licensees) • 305 compliance inspections in terms of (and for enforcement of) Community Broadcasting Services Regulations and Regulations regarding the Standard Terms and Conditions for Class Licenses. The 305 inspections will be targeted at community broadcasting services licensees • 2505 compliance inspections conducted in terms of (and for enforcement of) Type Approval Regulations • 90% implementation of Consumer Education Plan • QoS monitoring through Drive testing done in five provinces **Level 3:** • 88% consumer complaints resolved one election period monitored one advisory from CAP • 98% of reported Radio Frequency interference cases resolved in 30 working days • four NATJOINTS instructions executed 110 compliance inspections in terms of (and for enforcement of) End-user and subscriber service charter regulations (ECS/ECNS Licensees). • 1835 Compliance Inspections in terms of (and for enforcement of) Regulations on radio apparatus installed at high sites • 410 Compliance inspections on Reserved postal services (for enforcement of the South African Post Code of Practice for the South African Postal Industry and Customer Care Standards Regulations applicable to Postal Services Licensees) • 310 compliance inspections conducted in terms of (and for enforcement of) Community Broadcasting Services Regulations and Regulations regarding the Standard Terms and Conditions for Class Licenses. The 310 inspections will be targeted at community • 2510 compliance inspections on Type Approval Regulations • 95% implementation of Consumer Education Plan • QoS monitoring through drive testing in six provinces **Level 4:** • 89% consumer complaints resolved one election period monitored one advisory from CAP • 99% of reported Radio Frequency interference cases resolved in 30 working days • four NATJOINTS instructions executed 115 compliance inspections conducted in terms of (and for enforcement of) End-user and subscriber service charter regulations (ECS/ECNS Licensees). • 1840 Compliance Inspections conducted in terms of (and for enforcement of) Regulations on radio apparatus installed at high sites • Compliance inspections on Reserved postal services (for enforcement of the South African Post • Code of Practice for the South African Postal Industry and Customer Care Standards Regulations applicable to Postal Services Licensees) • 315 compliance inspections conducted in terms of (and for enforcement of) Community Broadcasting Services Regulations and Regulations regarding the Standard Terms and Conditions for Class Licenses. The 315 inspections will be targeted at community broadcasting services licensees

Definition (continued)	• 2515 compliance inspections conducted in terms of (and for enforcement of) Type Approval Regulations • 95% implementation of Consumer Education Plan • QoS monitoring through Drive testing in seven provinces **Level 5:** • 90% consumer complaints resolved one election period monitored • one advisory from CAP • 100% of reported Radio Frequency interference cases resolved in 30 working days • four NATJOINTS instructions executed 120 compliance inspections conducted in terms of (and for enforcement of) End-user and subscriber service charter regulations (ECS/ECNS Licensees) • 1845 Compliance Inspections conducted in terms of (and for enforcement of) Regulations on radio apparatus installed at high sites • Compliance inspections on Reserved postal services (for enforcement of the South African Post Code of Practice for the South African Postal Industry and Customer Care Standards Regulations applicable to Postal Services Licensees) • 320 compliance inspections conducted in terms of Community Broadcasting Services Regulations, and Regulations regarding the Standard Terms and Conditions for Class Licenses. The 320 inspections will be targeted at community broadcasting services licensees • 2520 compliance inspections in terms of (and for enforcement of) Type Approval Regulations • 95% implementation of Consumer Education Plan • QoS monitoring through Drive testing in nine provinces
Source of Data	Consumer rights protection initiatives implemented per Programme
Method of Calculation/ Assessment	Counting
Assumptions	All initiatives to protect consumer rights executed. The execution / fulfilment of the indicator title requires inter alia, the ability of the field workers (inspectors) to execute inspections at licensee's premises and outlets, attendance of NAT Joints events, scheduling of activation campaigns with communities etc. These are all dependent on the prohibitions against movements and gatherings being lifted.
Disaggregation of Beneficiaries (where applicable)	Women, youth and disabled people have an equal chance to benefit.
Spatial Transformation (where applicable)	Country-wide
Reporting Cycle	Annually
Desired Performance	Rights of consumers protected
Indicator Responsibility	Chief Executive Officer

ANNEXURE B: DISTRICT DEVELOPMENT MODEL

Areas of Intervention	Medium Term (3 Years MTEF)					
Communication	**Project Description**	**Budget Allocation**	**District Municipality**	**Location: GPS Coordinates**	**Project Leader**	**Social Partners**
Communication	Quality of Service monitoring in provinces	Part of Programme 4: Engineering & Technology	Lejweleputswa Municipality	28.3991° S, 26.2305° E	Phillip Ramalata	The Municipality
Communication	Quality of Service monitoring in provinces	Part of Programme 4: Engineering & Technology	Ruth Mompati Municipality	26.6635° S, 24.3341° E	Phillip Ramalata	The Municipality



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