



**ESWATINI
COMMUNICATIONS
COMMISSION**



**INFORMATION
AND COMMUNICATIONS
TECHNOLOGY**

**SECTOR
REPORT**



**20
24**

**KINGDOM
OF ESWATINI**

HIGHLIGHTS



1,576,465

Cellular subscriptions



38,828

Total fixed broadband subscriptions



1,473,487

Broadband subscriptions



40,091

Total fixed telephone subscriptions



963,990

Smartphone connectivity



16 379

Fixed wireless telephone



ABOUT US



VISION

To be a dynamic regulator of communications services in Eswatini that facilitates the delivery of affordable, sustainable and quality services



MISSION

To derive maximum socio-economic benefits for all Emaswati from ICTs through the effective regulation of telecommunications, broadcasting and postal services in Eswatini



VALUES

- Integrity
- Transparency
- Teamwork
- Accountability
- Innovation



FOREWORD FROM THE CHIEF EXECUTIVE

Mvilawemphi Dlamini

On behalf of the Eswatini Communications Commission, it is an honour and privilege to present the Information and Communication Technology (ICT) Sector Report for the Kingdom of Eswatini for the financial year 2023/24. Responding to the Nkwe! directive from His Majesty King Mswati III, i.e. to revitalise the economy and create job opportunities, the Commission has vigorously pursued means to bridge the digital divide by connecting the unconnected, especially in underserved areas, and ultimately ignite economic activity in Eswatini.

Broadband connectivity is not just the backbone of modern economies but also a critical enabler of vibrant societies. The Commission envisions to be an agile, collaborative enabler of a converged and secure digital Eswatini, and has therefore heeded the call by the country's authorities to accelerate agility in the enablement and development of the Kingdom's ICT sector. With the diverse geography, demographics, and socio-economic dynamics characteristic of the Kingdom, robust broadband connectivity transcends a mere technological necessity and emerges as an imperative for Eswatini's sustained prosperity amid multifaceted challenges. As many other countries in the Southern African Development Community (SADC) region transition from low to middle-income status, high-quality broadband connectivity has become a pivotal enabler of this transformation as it fuels innovation, streamlines the exchange of

goods and services, and drives economic growth. The country's vulnerability to intermittent climate changes underscores the crucial need for resilient network infrastructure, while demographic shifts towards a young population demand innovative solutions and enhanced connectivity for all. The persisting urban-rural divide poses challenges in the quest to ensure that all citizens have access to reliable connectivity.

Recognising these challenges, this report presents the state of progress and development in the ICT ecosystem resulting from various initiatives undertaken to improve the sector. It further seeks to support policymakers by providing policy recommendations to promote high-quality telecommunication services in the Kingdom of Eswatini. These recommendations leverage on the aspirations of the International Telecommunications Union (ITU) on universal connectivity, covering key issues such as market developments, competition, investment, innovation, digital divides, and the environmental impact of networks.

Tracking ICT Development Progress

The report shows substantial transformation of the Kingdom's ICT landscape in the last 5 years, reaching 1,576,465 mobile cellular subscriptions in 2024, a 40% increase from 2019. Mobile broadband subscriptions constitute over 93% of total cellular



subscriptions, indicating a dynamic mobile broadband market with an average annual growth rate of 25% over the last 5 years. Currently, mobile broadband penetration stands at 124% while mobile cellular penetration stands at 133% per 100 inhabitants. Despite these developments, the ICT landscape is far from uniform, with significant disparities among the population. It is on this account that the Commission has embarked on targeted interventions to ensure that the digital divide is bridged.

The Commission is committed to establishing a dynamic market to enable a functioning modern communications network. To this end, major strides have been taken regarding development and deployment of network infrastructure for mobile communications to extend market penetration and improve the quality of service for consumers. In the review period, the number of 2G sites increased by 8.4% to 723, extending population coverage by 0.7% to 98.7%. The number of 3G sites grew by 7.9% to 724, also with a similar population coverage of 98%.

The 4G network coverage continued to grow, with sites increasing by 26.8% to 724, resulting in a significant 14.5% progress in geographic coverage from 67.4% to 81.9%. 4G network population coverage improved from 87.2% to 94.7%. The deployment of 5G networks is still at pilot stage in the Kingdom of Eswatini. Fixed Network Operators

continued with Fibre-to-the-Home deployment to replace the Asymmetric Digital Subscriber Line (ADSL) technology, which is prone to service disruptions caused by copper theft and vandalism of infrastructure. Essentially, Fibre presents a significant stride towards more reliable, secure and resilient networks. These efforts support the Eswatini Digital Strategy (EDS), which seeks to foster connectivity for digital transformation, with targeted goals to expand communication infrastructure and improve service. The prevailing broadband challenges require adaptive policies and comprehensive approaches to navigate the complexities of the country's digital landscape.

Several telecommunication indicators exhibited positive progress in the period, signalling improvements in the communications sector, as a key driver of economic growth. Mobile cellular subscriptions grew by 4.2% to 1,576,465 connections, largely attributed to an expansion in mobile cellular network coverage. Consistently, mobile broadband subscriptions improved by 6.01% to 1,473,487. Smartphone penetration also extended by 5% to 81%, supporting the advancement in digital inclusion among the population. The Commission continued its pursuit on initiatives to address concerns on the cost of communication. Accordingly, the 3-year wholesale rates reduction glide path remained in effect and

out-of-bundle voice tariffs by telecommunication operators have reduced by an average of 50%. Furthermore, a data pricing philosophy was implemented by operators, where the quantity of the data offered to customers was increased while the price remained constant. This approach enabled consumers to access more data at the same price, while enabling longer durations of connectivity.

The country made further strides towards attaining Target 2 of the UN Broadband Commission's goals which stipulate that entry-level broadband services should cost less than 2% of monthly gross national income (GNI) per capita. The Kingdom met the set target on three (3) Baskets, which are the Fixed Broadband (5GB) Basket (currently at 2% of GNI), Mobile Data and Voice Low Consumption Basket (currently at 1%) and the Mobile Cellular Low Usage Basket (currently at 1%). Eswatini ranked 2nd in the SADC region on the Fixed Broadband basket pricing in terms of affordability. Additionally, the entrance of Starlink into the market (which offers higher internet speeds up to and beyond 100 Mbps) ignited competition in the Internet Service Provision (ISP) market, as most operators raised their minimum speeds offering from 1Mbps to 5Mbps.

National Projects Update

Pursuant to developing a robust and standardized addressing system, the Commission continued work on the National Addressing and Postcode System (NAPS) Project, with significant progress attained in the period under review. The development phase of the national addressing standard has begun. The NAPS project seeks to enhance efficiency of mail delivery, improve emergency response services, facilitate accurate navigation and location-based services, as well as support the overall national development initiatives. The development of Data Protection Act Regulations was also undertaken in the review period, and these are at the final draft stage. Section 48 of the Data Protection Act requires data controllers to appoint Data Protection Officers (DPOs), in order to drive compliance within their organisations. On the Cybersecurity front, the

Computer Crime and Cybercrime Draft Regulations were presented to stakeholders for review. Several capacity building initiatives were undertaken with stakeholders, which includes the training of Judiciary and Law enforcement officers on the Computer Crime and Cybercrime Act as well as the offences and penalties under the Act.

The ICT sector's contribution to the economy is expected to continue through job creation, social investment, fiscus contribution, and the increase in digital and financial inclusion products. The impact of such contribution results in an employment multiplier effect experienced both within the ICT sector and other related sectors. Service providers' activities to boost inclusive economic growth through capital infrastructure investments, operating expenses, and contribution to the tax base result in the creation of direct, indirect, and induced jobs across the ICT value chain. Inclusive connectivity is anticipated, in driving digital and financial inclusion, increasing access and reducing the costs of communication, ultimately connecting people not only to each other but also to business and educational opportunities.

Prospect For The Future

To keep improving, developing and enabling the sector, the Commission shall continue guiding the sector through targeted initiatives for implementation. These shall include but not limited to: Undertaking regular competition assessments, where the country could benefit from conducting regular assessments of competition in relevant communication markets. Such assessments shall help identify factors that could hinder market competition and the need for regulatory measures to foster market competition. Further policy considerations could include facilitating private sector participation, to stimulate innovation, diversify services and contribute to the long-term development of the sector.

The Commission shall continue strengthening its regulatory frameworks to adapt to new challenges and opportunities presented by the ever-changing digital landscape. Through regular reviews of legislative frameworks across the sectors it

regulates, the Commission shall ensure it remains keeps up to speed with the evolving technology. These reviews shall include but not limited to, access to rights of way and infrastructure sharing, thus improving coordination mechanisms that will significantly facilitate timely deployment of networks. Essentially, this will promote coordination of passive infrastructure sharing between networks to ensure cost-effective expansion, deployment and upgrading of networks in underserved areas. Synergies shall be leveraged between programmes targeted at promoting provision and adoption of connectivity services. Creating synergies between various public policy initiatives aimed at extending coverage, and programmes to promote digital literacy, local content and public access points can significantly maximise their overall impact.

Additionally, ESCCOM shall continue working on improving transparency and performance data publication in the sector. Establishing a standardised framework for open, verifiable and granular data publication on subscriptions, coverage and quality of service will empower end-users and stimulate competition. It will further promote policies to enhance network resilience, including backbone, Internet exchange points and international connectivity. These measures are aimed at addressing challenges and vulnerabilities in the sector, and strengthening communication infrastructure to enable and support uninterrupted connectivity. The Commission will also work on the establishment of a regular assessment procedure for broadband markets. Such a process shall ensure a continuous, data-driven evaluation of connectivity metrics, enabling evidence-based policy adjustments and targeted interventions. Regular market reviews will result in comprehensive data publications, benefiting both stakeholders and consumers in the ICT value chain.

Preparation for Emerging Technologies

The Commission envisages creating an enabling environment for emerging technologies and digital innovation to unleash transformative sustainable through productivity gains and diversification. However, the successful integration and deployment of these emerging technologies

requires agile and anticipatory regulatory frameworks that minimize their pertinent risks. Policies that frame future spectrum technologies, including 5G, fixed wireless access, satellite and space technologies, or a mix of technologies for mobile broadband to achieve universal and meaningful connectivity are therefore anticipated.

Adopting emerging technology and innovation policies will be a cornerstone of the Kingdom's efforts in creating a conducive and fit-for-the-future environment for structural transformation and economic resilience. As such, the Commission envisages to continue advancing digital transformation, universal and meaningful connectivity policy agendas to achieve national priorities and sustainable development goals (SDGs).

In conclusion, the Commission will continue to foster innovation, enhance connectivity, and partnering with government in driving the digital transformation agenda. Key focus will be placed on expanding broadband access, improving quality of service, and fostering a competitive market environment, while safeguarding consumer welfare and ensuring affordability of communication services.

I thank you.



ACRONYMS

ADSL	Asymmetric Digital Subscriber Line
AFRALTI	African Advanced Level Telecommunications Institute
CIT	Company Income Tax
AI	Artificial Intelligence
BTS	Base Transceiver Stations
CBE	Central Bank of Eswatini
CRASA	Communications Regulators' Association of Southern Africa
DSL	Digital Subscriber Line/Loop
DTT	Digital Terrestrial Television
EPTC	Eswatini Posts and Telecommunications Corporation
ESCCOM	Eswatini Communications Commission
ESM	Eswatini Mobile
EU	European Union
FSRA	Financial Services regulatory Authority
FTE	Full-Time Equivalent
FWA	Fixed Wireless Access
FY	Financial Year
GDP	Gross Domestic Product
GSMA	Global System for Mobile Communications Association
ICT	Information and Communication Technology
IMT	International Mobile Telecommunications

ISDN	Integrated Services Digital Network
ISPs	Internet Service Providers
ITU	International Telecommunications Union
LTE	Long Term Evolution networks / 4G
MNOs	Mobile Network Operators
MTN	Mobile Telephone Network
OIT	Other Income Tax
OTTs	Over-the-Top Technologies
PAYE	Pay as You Earn
PSTN	Public Switched Technology Network
SADC	Southern African Development Community
SIM CARD	Subscriber Identity Module
SMMEs	Small Medium and Micro Enterprises
SMS	Short Message Service
ESWASA	Eswatini Standards Authority
SZL	Swaziland Lilangeni
UAS	Universal Access and Service
UNDP	United Nations Development Programme
USD	United States Dollar
VoIP	Voice-over-Internet Protocol
WLL	Wireless Local Loop
YOY	Year-on-Year

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EXECUTIVE SUMMARY

The Information and Communication Technology (ICT) sector posted decent performance in the period under review, relative to the contraction in some of the indicators in the previous year. A rebound in mobile subscriptions was experienced in the review period, compared to a decline last year which had been due to the churning out of inactive SIM cards by Mobile Network Operators (MNOs). Mobile cellular subscriptions grew by 4.2 percent to 1,576,465 connections, largely attributed to an expansion in mobile cellular network coverage. Correspondingly, mobile broadband subscriptions rose by 6.01 percent to 1,473,487. This resulted in mobile cellular penetration expanding by 4.0 percent to 133 percent with mobile broadband penetration similarly extending, by 6.0 percent to 124 percent.

Figure 1: Mobile Network Connectivity

Mobile Network Connectivity	2021/22			2022/23			2023/24		
Cellular subscriptions	1 524 629	↑	19%	1 513 118	↑	-0.8%	1 576 465	↑	4.19%
Broadband subscriptions	1 379 526	↑	25%	1 389 894	↑	0.8%	1 473 487	↑	6.01%
Smartphone connectivity	809 155	↑	22%	890 886	↑	10.1%	963 990	↑	8.21%
Cellular penetration	131%	↑	17.31%	129%	↓	-1.91%	133%	↑	2.96%
Broadband penetration	119%	↑	23.84%	118%	↓	-0.42%	124%	↑	4.77%
Smartphone penetration	70%	↑	11.73%	76%	↑	6.15%	81%	↑	5.26%

Source: ESCCOM, 2024

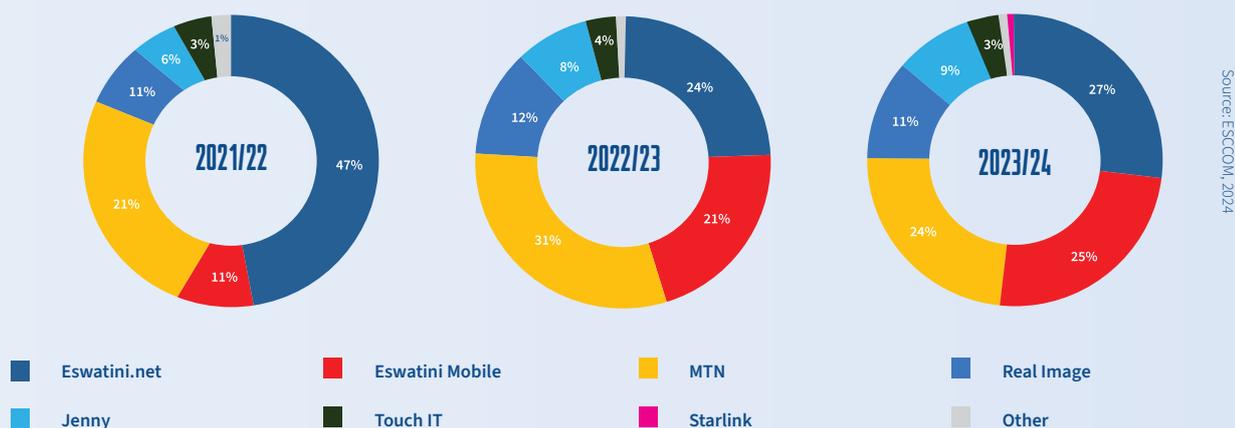
Fixed telephone subscriptions increased by 1.2 percent from 39,616 to 40,091 subscriptions. Growth in fixed telephone connectivity continued to be driven by fixed-wireless telephone connectivity, which recorded a rise of 5.3 percent from 15,557 to 16,379 subscriptions. Fixed-line telephone connectivity continued a downward trajectory from 24,058 to 23,712 subscriptions, a decline of 1.4 percent mainly attributed to copper cable theft. The theft of copper cable and vandalism of fibre infrastructure continued to disrupt connectivity for fixed-wired customers, which has led to both business and household consumers switching to fixed-wireless services.

Figure 2: Fixed Network Connectivity

Fixed Network Connectivity	2021/22			2022/23			2023/24		
Total fixed telephone subscriptions	38 537	↓	-1.5%	39 616	↓	2.80%	40 091	↑	2.76%
Total fixed broadband subscriptions	29 784	↑	0.09%	30 125	↑	1.14%	38 828	↑	12.29%
Fixed line telephone	28 901	↓	-23%	24 059	↓	-16.75%	23 712	↓	-1.14%
Fixed Wireless Telephone	9 636	↑	0.24%	15 557	↑	61.45%	16 379	↑	5.8%

The mobile phone/cellular penetration rate shows the number of SIM cards used in each country. The data is presented as a percentage and thus may exceed 100% if the number of SIM cards in the country is higher than the actual population number. Market share in the Fixed Broadband market shifted in favour of EPTC's Eswatini.net, Eswatini Mobile and Jenny Internet who all gained market share. MTN and Real Image Internet shed market share in the period. The new entrant in the ISP market, Starlink, managed to attain 1.1 percent market share of the subscriptions, attributed to offerings of high speeds and unlimited access to customers. Starlink's entrance revitalised competition in the fixed broadband market as other players also revised their offerings to try and match those of the new entrant.

Figure 3: Fixed Broadband Market Share



Telecommunications revenue went up by 9.2 percent to E2,567, 611,980 (E2.5 billion), primarily driven by the rise in demand for data, voice, and leased line services. Data Services revenue grew by 12.5 percent to E1,085,890,977, while Voice Services revenue also improved, by 2.3 percent to E843,289,720. Short Message Service (SMS) revenue increased by 2.5 percent to E9,513,756. The number of personnel employed in the telecommunications industry declined by 24.9 percent to 954. Employment by MNOs shrank by 49.9 percent to 286 while employment in Fixed Network Operations decreased by 4.4 percent to 668. The significant decrease is attributed to one of the mobile network operators undergoing a company restructuring exercise which resulted in the considerable reduction in employment numbers while drops in fixed operations employment is mainly attributed to natural attrition and retirement.

In the postal sector, Postal Services revenue rose by 25.8 percent to E30,356,122. Domestic Mail volumes i.e., registered, and unregistered letters sent and received, plummeted by 23.7 percent to 653,745, while International Mail volumes (outbound and inbound) also declined, by 9.8 percent to 557,668. International Packets and Parcels (outbound and inbound) decreased by 1.8 percent to 14,363 with the number of Postal boxes rented falling by 12.5 percent to 12,011. Broadcasting revenue increased by 50.2 percent to E21,867,474. The number of broadcasting productions grew marginally by 0.01 percent to 10,573. Employment statistics reveal that broadcasting sector employees grew by 5.9 percent to 396, where radio employment remained constant at 162, while Television employment improved by 1.9 percent to 209. Radio coverage stood at 95 percent while Television (TV) coverage was at 86 percent at the close of the reporting period.

INTRODUCTION

01

Information and Communications Technologies (ICTs) have proven to be the pivot that drive change and innovation, as they accelerate and amplify digital transformation. This became even more apparent during periods when business was extremely constrained. Digital transformation has a huge potential to improve national productivity by making government and business enterprises more efficient, effective, and globally competitive. Therefore, digital transformation is effectively a driver of social and economic development, and most recently political transformation and stability.

The ambition of the Kingdom of Eswatini's government is to transition from current manual service provision processes to full digitization, creating one stop shops using online platforms. Through taking deliberate steps, government endeavours to continue sustaining the development and adoption of new ICT strategies that can be leveraged to realise the country's digital future. These

shall include the review, development and implementation of ICT policy and legislative frameworks; improving access to information and services using ICTs; facilitate Infrastructure Development; sensitize and increase awareness on ICTs; mobilise resources for funding projects and programmes; continually promote Research & Development and innovation across all sectors; and promote the integration of ICTs across Government.

The adoption of ICT therefore needs to be fast-tracked to increase access to information on agriculture, business, education, climate, environment, and health, while expanding business and income earning opportunities to improve Eswatini's well-being. It is apparent that there is an increased demand for ICT related services throughout the economy, and this has accelerated the need for digitization particularly in the sectors mentioned above. Eswatini is therefore continuously working on various policy reforms to broaden access to Internet connectivity, reduce communication



costs to ensure connectivity, access to electricity, increase digital skills, while availing affordable devices for all.

1.1 BACKGROUND

The Annual Information and Communication Technology Sector report presents the performance and developments in the Electronic Communications Sector, focusing generally on the Telecommunications, Broadcasting, Postal and Courier Markets. The report further gives an account of the initiatives undertaken over the 2023/24 Financial Year (FY) to develop and enable the sector. It aims to provide an up-to-date account on the performance of the sector, to assist stakeholders to make informed decisions based on verifiable data and statistics. The report analyses Telecommunications, Broadcasting, and the Postal and Courier markets detailing subscriptions, penetration, coverage, revenue, and employment, amongst other economic indicators. Supply-side market data collected

from licensees is used to track trends in the indicators.

The outcome of these analysis is based on collected micro-level data, as well as macroeconomic drivers that expound observed patterns at national level. Additionally, current market dynamics and limitations requiring redress in the sector are examined.

The report as well, presents interventions undertaken to enable and regulate the market, safeguard against anti-competitive practices, develop and expand the sector. These initiatives are intended to assist achieve market efficiency, balance supply and demand dynamics, thereby aligning interests of both service providers and consumers accordingly. Finally, the report presents regulatory frameworks implemented for effective regulation of the sector, reviews of existing legislation, projects undertaken as well as prospects and an outlook for the sector.

OVERVIEW OF GLOBAL ICT DEVELOPMENT

02

2.1 GLOBAL CONNECTIVITY

Mobile connectivity remains pivotal in driving digital innovation. It empowers individuals and enterprises with a wide array of transformative technologies while also aiding governments in delivering positive societal impacts. The International Telecommunications Union (ITU) data shows that more than 75 per cent (about 6.1 billion) of the total world population has an active mobile broadband subscription, and over 57 per cent of households have access to the internet. Growth in mobile internet penetration has been even faster. At the end of 2023, approximately 58 per cent of the world's population used mobile internet, equating to 4.7 billion users, an increase of 2.1 billion since 2015.

However, the usage gap remains: 3 billion people live in areas covered by mobile broadband networks but do not use mobile internet. Addressing the usage gap is crucial to closing the digital divide, thereby unlocking the benefits of life-enhancing applications beyond communication, including digital finance, health and clean energy. The impact of mobile connectivity is evidenced by its contribution to the economy. In 2023, mobile

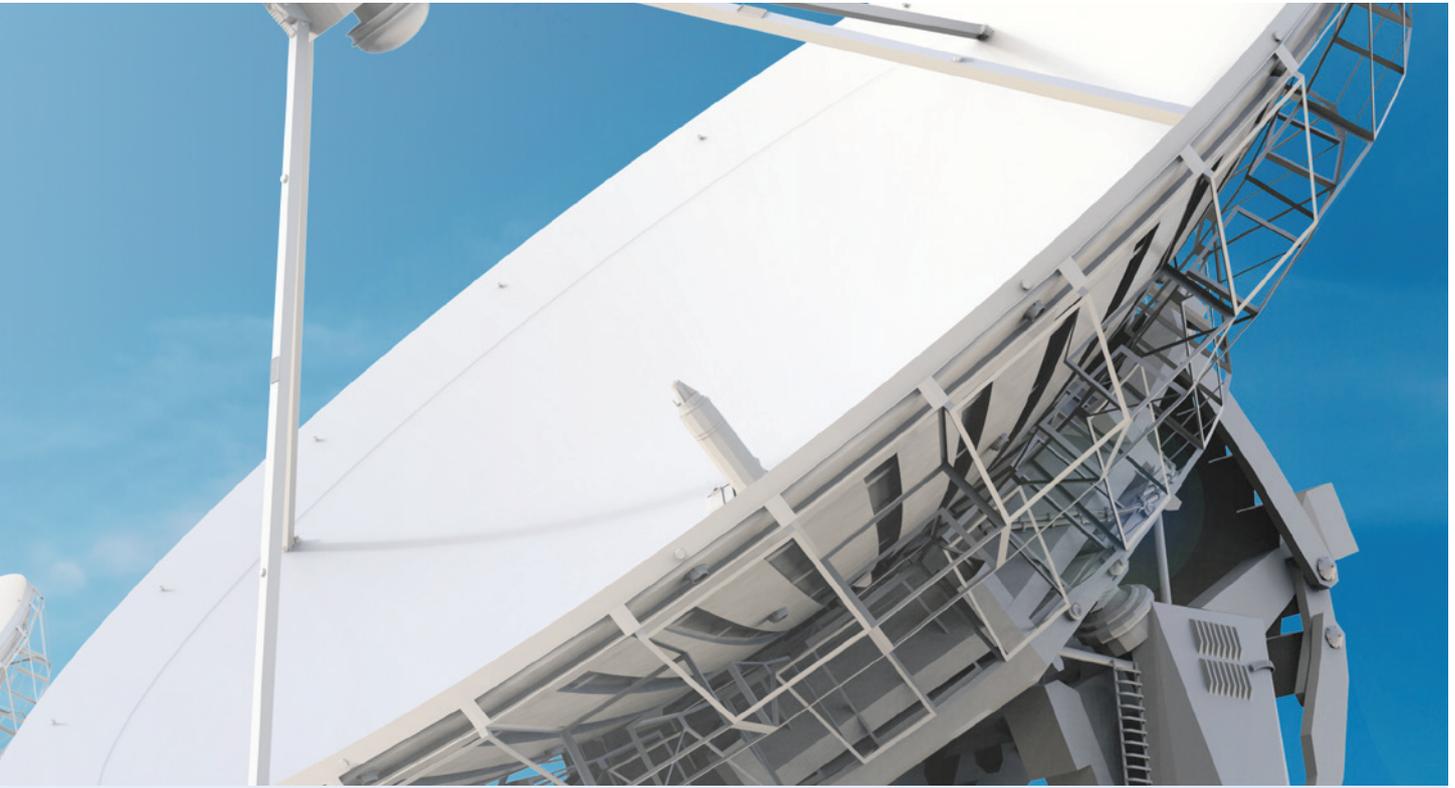
technologies and services generated 5.4 per cent of global GDP, a contribution that amounted to \$5.7 trillion of economic value added and supported around 35 million jobs.

2.2 SELECTED KEY TRENDS SHAPING THE MOBILE ECOSYSTEM

2.2.1 5G standalone and 5G-Advanced Are the Next Phase

The mobile industry is increasingly moving to the 5G Standalone (SA) and 5G-Advanced standards to unlock innovative 5G use cases and create new revenue streams.

As of January 2024, 47 operators across the globe offered commercial 5G services on their standalone networks, while more than half of operators expect to deploy 5G-Advanced activities within a year after standards are released. Increased 5G Standalone and 5G-Advanced activities in 2024 will kickstart a new round of 5G investment, especially in pioneer markets. This has the potential to open a wealth of opportunities to enable enhanced functionality and use cases for the enterprise.



2.2.2 Satellite: Emerging Solutions and Partnerships Reshape the Connectivity Landscape

Telecoms and satellite partnerships are set for take-off in full swing. Telecoms networks have driven voice and data connectivity to the current levels of over 4.7 billion mobile internet subscribers. Satellites and other non-terrestrial networks (NTNs) have also been providing connectivity but at a much lower scale. However, advances in various satellite and NTN solutions have resulted in performance improvements, lower deployment costs and more commercially viable business models, raising the prospects of greater participation in the connectivity landscape.

In the last two years, the list of partnerships between telecoms operators and satellite companies has grown, with more deals expected in 2024 and beyond. Meanwhile, direct-to-device (D2D) solutions and partnerships are gaining traction following technical breakthroughs that have allowed satellites to connect to standard smartphones.

2.2.3 Digital consumer: eSIM Adoption Should Accelerate as New Services Launch

Recently, eSIM adoption has been gathering pace world over. The number of eSIM consumer devices launched has grown significantly over the last five years and the number of commercial eSIM services is also on the rise. This has set the foundation for eSIM adoption to gather pace over the course of the decade. It is predicted that there will be around 1 billion eSIM smartphone connections globally by the end of 2025, growing to 6.9 billion by 2030. This would account for around three quarters of the total number of smartphone connections by 2030. North America will be the region with the fastest rate of eSIM adoption due to a launch of eSIM-only smartphones in September 2022.

The technology has also been introduced in Eswatini as the two MNOs in the market are offering eSIM cards. Furthermore, the sim card design is moving away from the traditional plastic made sim card to a biodegradable paper based, environmentally friendly format. This is in line with the country's aim of promoting and integrating Green ICTs and environmental sustainability in the Communications sector.

KINGDOM OF ESWATINI ICT PROFILE

03

3.1 COUNTRY PROFILE

Growth in connectivity and economic indicators was observed in the review year ending March 2024, which resulted from increased demand for broadband services driven by the momentum experienced in the previous reporting period. In general, the world has witnessed a period of accelerated ICT development triggered during the period of the pandemic where most services migrated to digital platforms.

Table 1: Kingdom of Eswatini Profile

INDICATOR	Eswatini
Population - Estimate	1,187,956
Urban Population	24%
Rural Population	76%
Male Population	49%
Female Population	51%
Age Group (6-18)	41%
Average Household Size (# of persons)	4
Total Number of Households	272,824
Land Area (km ²)	17,350
Density (/km ²)	68
Gross Domestic Product (GDP) per Capita (US\$, Billion)	\$3,705
Literacy Rate (percent)	95%

Source: Central Statistics Office, 2024



The demand for ICT services trespassed new levels globally, with the need for digital connectivity wavering at unprecedented levels. A snapshot of the country's ICT profile, displaying the extent of development within the Kingdom's ICT environment, is presented in the tables below. The Kingdom of Eswatini had thirty-four (34) licensees in the Electronic Communications Sector at the close of the reporting period. These consisted of five (5) broadcasters, three (3) telecommunications operators, twenty-one (21) Internet Service Providers (ISPs) and eight (8) licenced postal and courier service providers.

3.2 ESWATINI'S PURSUIT FOR UNIVERSAL CONNECTIVITY

The Internet delivers substantial economic benefits, revolutionizing communication, entertainment and collaboration. It provides access to essential services, vast knowledge, learning opportunities, and job prospects, making digital connectivity a vital everyday necessity. And yet, one-third of humanity remains offline, and many users must make do with poor connectivity at a very basic level. Digital divides persist and are widening for some demographics and geographies. Universal and meaningful connectivity is the possibility for everyone to enjoy a safe, satisfying, enriching and productive online experience at an affordable cost. It emphasizes a multidimensional approach to digital connectivity and highlights the need for

holistic strategies beyond digital infrastructure. This comprehensive approach is crucial for fully leveraging the potential of connectivity for social and economic development. The role of ICT data in achieving universal and meaningful connectivity is vital, but frequently overlooked.

Data provide insights into past, present and future states, and gives guidance in setting priorities, crafting effective interventions, tracking progress and ensuring accountability. Hence the Kingdom of Eswatini prioritises the periodical gathering, analysis and dissemination of data on connectivity and information and communication technology (ICT). In this quest, the Commission undertook the Information Communications and Technology Access and Usage Survey (ICTAUS) in 2022 to measure the level of access and use of ICT by households and individuals in the Kingdom of Eswatini. Comprehensive demand-side ICT data was gathered to provide key statistical information on the ICT market in Eswatini, track growth of the industry and facilitate evidence backed decision making to inform policy formulation in developing the ICT industry.

A response rate of 95 percent was achieved in the survey, whose outcomes are anticipated to enhance the country's ability to plan and deliver ICT services to its citizens efficiently and effectively in the medium term. ICTs are anticipated to play a significant role in accelerating digital financial inclusion and availing access to digital financial services which have proven to help lift people out of poverty.

They principally form an essential part of many households' basket of goods and help accelerate progress towards the attainment of the 17 United Nations Sustainable Development Goals (SDGs). Efficient and affordable ICT services will thus allow Eswatini to participate meaningfully in the digital economy and to increase its overall economic well-being and competitiveness. The ICTAUS project therefore aimed to measure the country's standing in terms of ICT development so that appropriate redress can be formulated.

The survey found that 67 percent households across the country have access to the internet, with 50.3 percent individuals across the country having access to the Internet while 49.7 percent are not connected. Contributing factors cited were the lack of network coverage in some geographical areas, lack of electricity, lack of knowledge, lack of appropriate devices or lack of interest in the service. Therefore, interventions are urgently needed to bridge the digital divide. The government remains on course with initiatives to enable internet access and connectivity, to facilitate the provision of low-cost digital access for schools, hospitals, and underserved populations. The power of collaborations will be critical in this pursuit.

Partnerships will therefore be key to bringing ICTs to all people and communities, from deploying the physical infrastructure required to deliver internet services to hard-to-reach areas and disadvantaged populations. Directed, and precise policies and strategies are critical in bridging the digital divide and filling the gaps unearthed from the findings of the survey. For ICT sector stakeholders (i.e. regulators, policy makers, operators / licensees) to succeed in bridging the digital divide, creativity and

collaboration will be crucial. Furthermore, finding ways to solve the challenges of digital inclusion is critical for stakeholders to leverage technology potential in addressing some of the country's most challenging development issues. With enabling regulatory frameworks and the right networks and services in place, ICTs have the potential to dramatically transform access to education, health care, environmental management, agriculture, opportunities for trade and entrepreneurship and the provision of government services to first-world status and broadly benefit the entire Eswatini population.

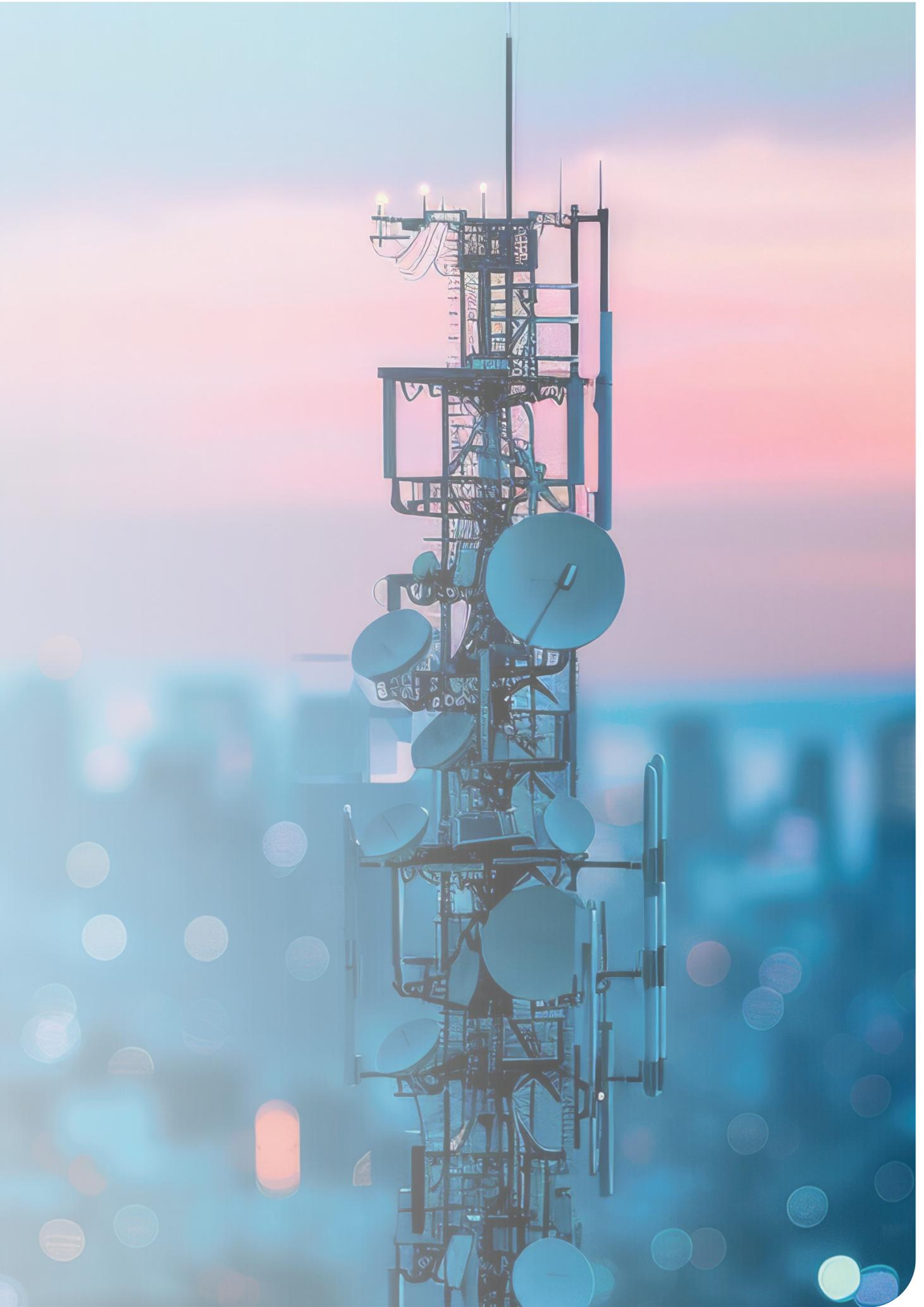


Table 2: Eswatini ICT Indicators

Indicator	Statistic
Fixed Telephony	
Main Fixed Telephone Lines	24,066
Main Fixed Telephone Lines per 100 Inhabitants	0.02
Mobile Telephony	
Number of Mobile Cellular Connected Subscribers	1,441,162
Active Mobile Cellular Subscribers per 100 Inhabitants	123
Percentage of Population Covered by a Mobile Cellular Telephone Network	98%
Affordability of ICT Services	
	USD (\$)
Mobile cellular – price of a one-minute local call (peak, to fixed)	0.07
Mobile cellular – price of a one-minute local call (peak, on-net)	0.07
Mobile cellular – price of SMS (off-net)	0.02
Mobile cellular – price of SMS (on-net)	0.02
Price of 1GB data	5.82
Internet and Broadband	
Fixed Broadband subscribers	26,636
Mobile Broadband Subscribers	1,210,836
Total Broadband (Fixed Broadband + Mobile Broadband) Internet subscribers	1,224,264
Total Subscribers per 100 Inhabitants	104
Total International Outgoing Internet bandwidth (Mbit/s) - consumption	48,564
Total International Incoming Internet bandwidth (Mbit/s)	67,150
Proportion of households with Internet access	67%
Radio Broadcasting	
Total Number of Public Broadcasting Radio Licences	1
Total Number of Commercial Broadcasting Radio Licences	0
Total Number of Community Broadcasting Radio Licences	2
Number of Public Broadcasting Radio Licences Operational	1
Number of Commercial Broadcasting Radio Licences Operational	0
Number of Community Broadcasting Radio Licences Operational	2
Number of transmission sites for radio	22
Proportion of households with a radio	46.7%

Source: ESCCOM, 2024

Indicator

Television Broadcasting

Number of Subscription Television Licences	0
Number of Free-to-Air Television Licences	2
Number of Subscription Television Licences Operational	0
Number of Free-to-Air Television Licences Operational	2
Number of Digital Satellite Stations	0
Number of Digital Terrestrial Stations	18
Number of Analogue Terrestrial Stations	0
Number of Signal Distributors	1
Number of Content Distributors	2
Number of set-top boxes	35,000
Proportion of households with a TV	54.5%

Postal Infrastructure

Total Number of Postal Service Points	53
Percentage of Postal Service Points located in Rural Areas	43
Total Number Of Postal Facilities Not Open To The Public (Sorting Centres Excluding Delivery Offices)	1

Access to Postal Services

Total Number of Post Office Boxes (P.O. Boxes)	41,150
Proportion of mail delivered through P.O. Box or Postal Service Point Counter	99%
Proportion of mail delivered directly to the home or business premises	1%
Proportion of the population that is excluded from postal delivery	32.73%
Presence of innovative solutions to extend access to mail delivery (e.g., automated parcel lockers, SMS notification-based delivery, etc.)	SMS notification, Mobile app, On- line Tracking

Postal Internet Connectivity

Percentage of Permanent Post Offices with Internet Connectivity	36%
Percentage of Permanent Post Offices providing public internet access points	15%
Percentage of Permanent Post Offices using automation systems	97.30%

PERFORMANCE OF THE ESWATINI ELECTRONIC COMMUNICATIONS SECTOR

04

TELECOMMUNICATIONS MARKET PERFORMANCE

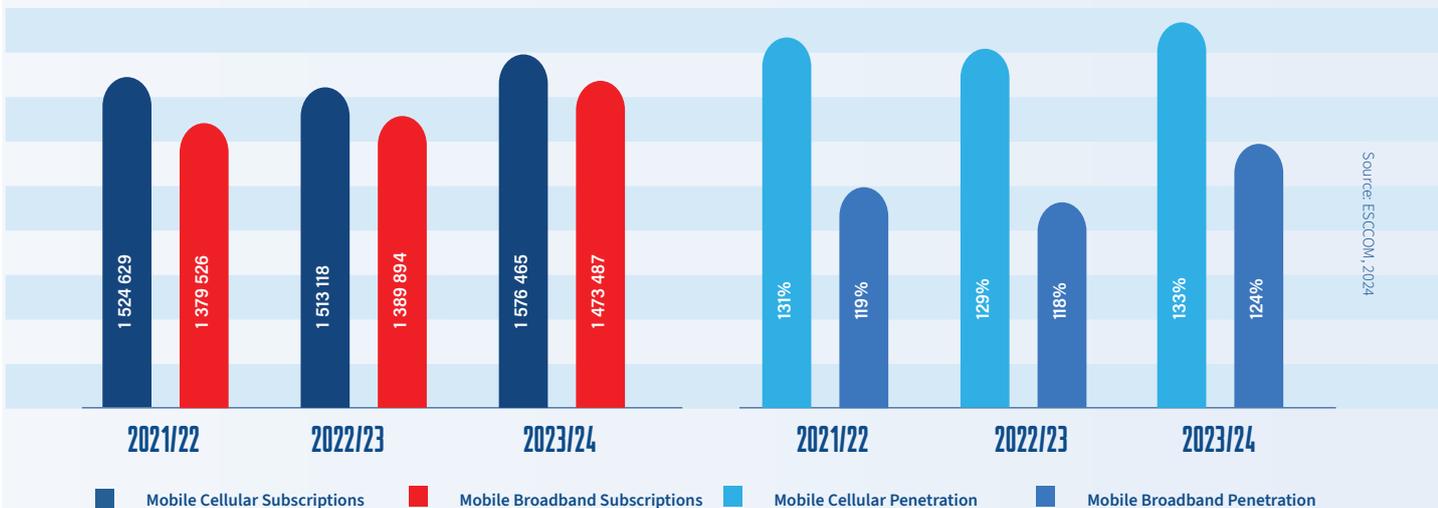
4.1 MOBILE NETWORK CONNECTIVITY

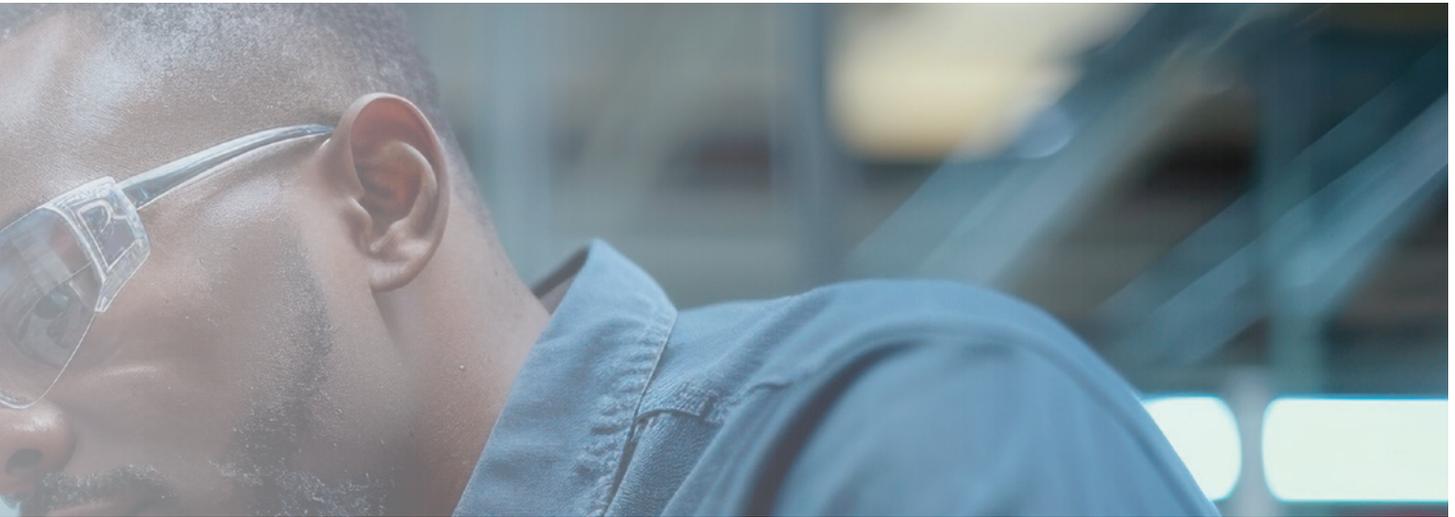
According to the Ministry of Economic Planning and Development (MEPD), the ICT subsector (estimated at a value of E3.1 billion at current prices in 2023, of which telecommunications contributes over 80 percent) experienced growth in the period, mainly driven by increased demand for broadband connectivity. The demand for digital connectivity was further supported on the supply-side by increased mobile cellular 4G/LTE network coverage.

4.1.1. Mobile Market Subscriptions

Mobile technology is the principal mode of communication in the Kingdom of Eswatini, connecting citizens and businesses daily at about 99 percent connectivity level. Mobile cellular subscriptions grew by 4.2 percent in FY 2023/24 to 1,576,465 subscriptions from 1,513,118 subscriptions in FY 2022/23. Mobile cellular penetration increased from 129 percent to 133 percent.

Figure 4: Mobile Subscriptions and Market Penetration





The growth in mobile cellular SIM connections in the review period was largely attributed to an expansion in mobile cellular network coverage. Mobile broadband subscriptions increased from 1,389,984 to 1,473,487, demonstrating a 6.01 percent growth. Mobile broadband penetration consequently increased from 118 percent to 124 percent. Growth in mobile broadband connectivity was largely attributed to increased mobile broadband 4G/LTE network coverage as well as demand for mobile broadband connectivity. The surge was further strengthened by the increase in smartphone connectivity, attributed to positive pricing offers for mobile data by the telecommunications operators and affordable smartphone devices availed in the market. With mobile market penetration, mobile cellular SIM card subscriptions per 100 inhabitants increased by 4.0 percent from 129 percent to 133 percent, while mobile broadband subscriptions per 100 inhabitants also increased, by 6.0 percent from 118 percent to 124 percent. Operators continued with the drive to extend mobile connectivity through the expansion of network infrastructure, which is expected to increase coverage and avail wider access of mobile network services to both the underserved and unconnected communities in the Kingdom.

4.1.2 Smartphone Connectivity

Smartphone connectivity, which is a driver of mobile broadband access, continued to grow unabated. It increased by 8.2 percent, from a total of 890,886 to 963,990 active smartphones recorded on mobile networks in the period FY 2023/24. This confirms the increased demand for mobile broadband connectivity. The increase is principally credited to affordable and flexible payment plans for smartphone devices plus favourable data offerings by mobile network operators, which contributed to improvements in mobile internet connectivity.

Figure 5: Smartphone Connectivity and Penetration

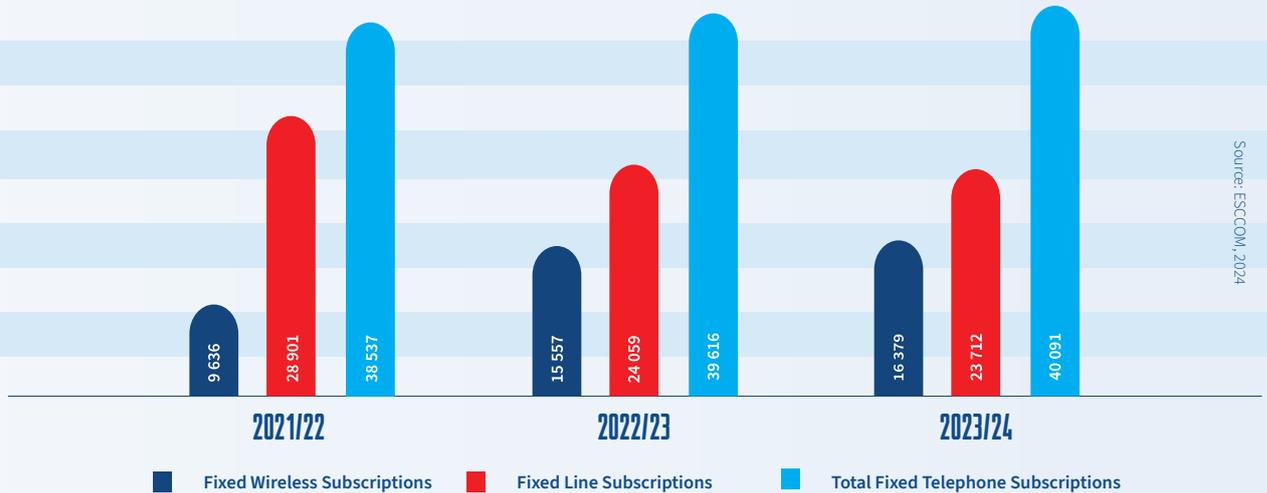


4.2 FIXED MARKET CONNECTIVITY

4.2.1 Fixed Telephone Subscriptions

Fixed telephone subscriptions grew by 1.2 percent from 39,616 subscriptions to 40,091 subscriptions. Growth in fixed telephone connectivity continued to be driven by fixed wireless telephone connectivity, which recorded growth of 5.3 percent in the period under review from 15,557 to 16,379 subscriptions. Fixed line telephone connectivity continued a downward trajectory from 24,058 to 23,712, demonstrating a decline of 1.4 percent mainly attributed to copper cable theft. The theft of copper cable continued to disrupt connectivity and has led to both business and household consumers switching to fixed-wireless services.

Figure 6: Fixed Telephone Subscriptions

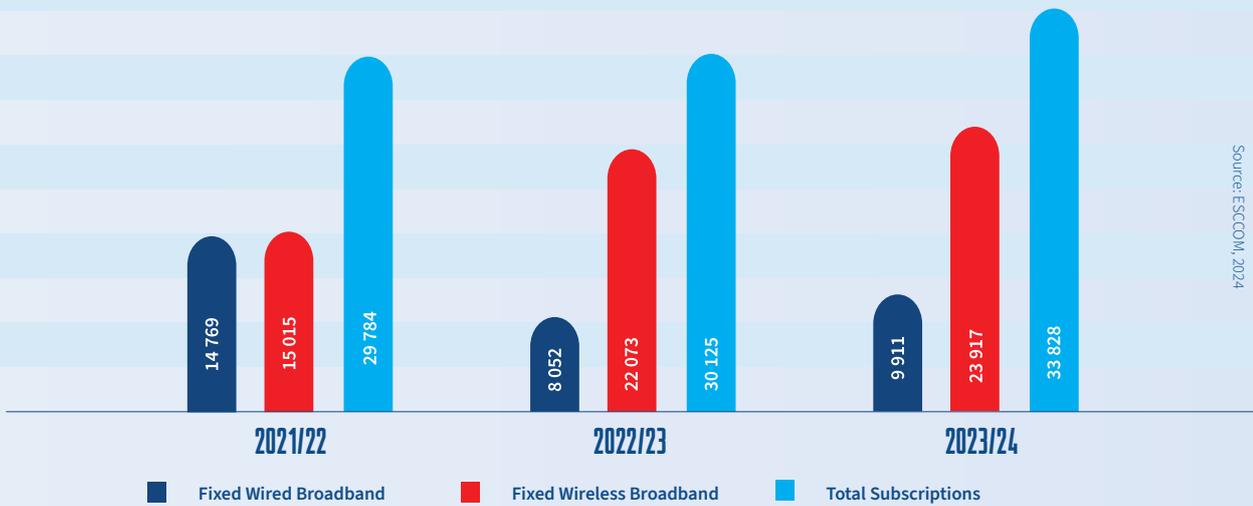


4.2.2 Fixed Broadband Subscriptions

The Eswatini Government has set its focus on building a resilient digital infrastructure to support the growing demand for connectivity, through committing to strengthen both fixed and mobile network infrastructure to maximize effectiveness. In enhancing network reliability and redundancy, government aims to ensure that citizens enjoy a more resilient and dependable digital experience. Broadband accessibility continues to be a key enabler for economic growth, therefore, ensuring ease of access for all citizens remains a high priority. Fixed broadband connectivity maintained an upward trend to record growth of 12.3 percent from 30,125 subscriptions to 33,828 subscriptions in 2023/24. This growth is mainly attributed to the ever-increasing demand for more reliable and faster broadband connectivity by both businesses and households, which was observed in the increased shift from fixed-line ADSL to fixed-wireless, fibre and satellite internet network services. Fixed-wired broadband connectivity rebounded in the review period, recording a growth of 23.1 percent from 8,052 to 9,911.

Fixed-wireless broadband connectivity continued to grow, rising by 8.4 percent from 22,073 to 23,917. Fixed-wireless internet connectivity has emerged as a more reliable technology over the fixed-wired version, therefore becoming the preferred connection for consumers.

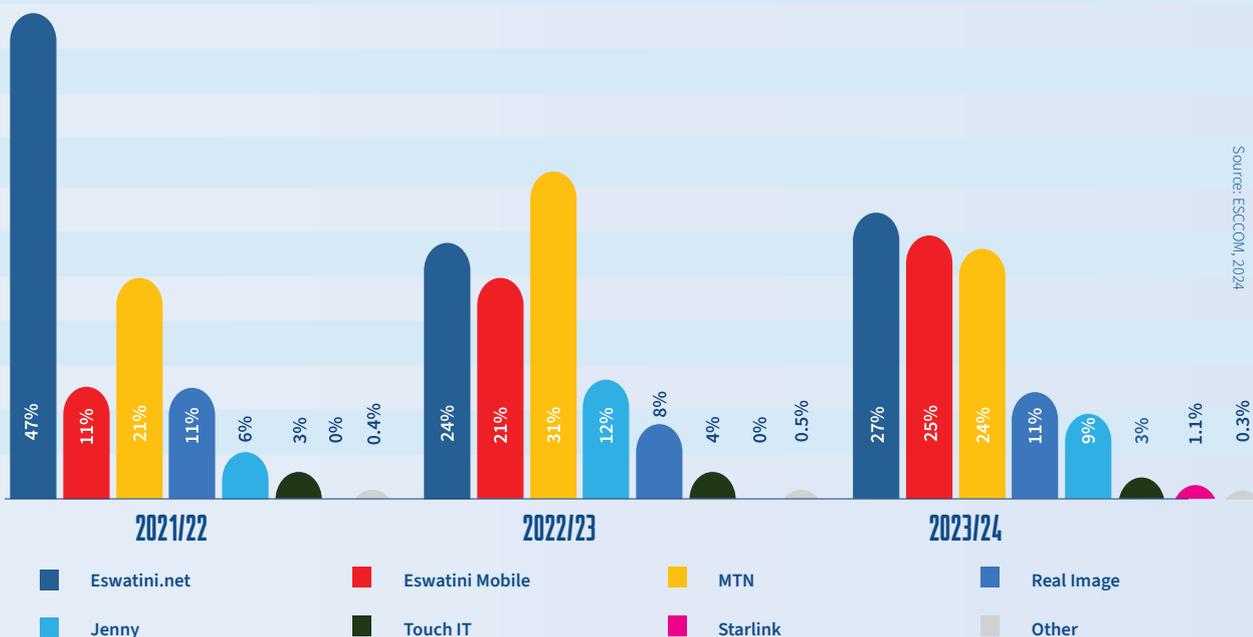
Figure 7: Fixed Broadband Subscriptions



4.2.3 Fixed Broadband Subscriptions Market Share

Market share in the Fixed Broadband market shifted in favour of EPTC’s Eswatini.net, Eswatini Mobile and Jenny Internet who all gained market share. MTN and Real Image Internet lost market share in the review period. The new entrant in the ISP market, Starlink, managed to attain 1.1 percent of market share subscriptions in the review period, attributed to their high speed and unlimited access offering to customers. Starlink’s entrance revitalised competition in the fixed broadband market as other players revised their offerings to try and match those of the new entrant. The average minimum speeds offered by the ISPs moved from 1Mbps to 5Mbps to catch up with the vibrant competition triggered by Starlink.

Figure 8: Fixed Broadband Subscriptions Market Share



4.3 ECONOMIC INDICATORS

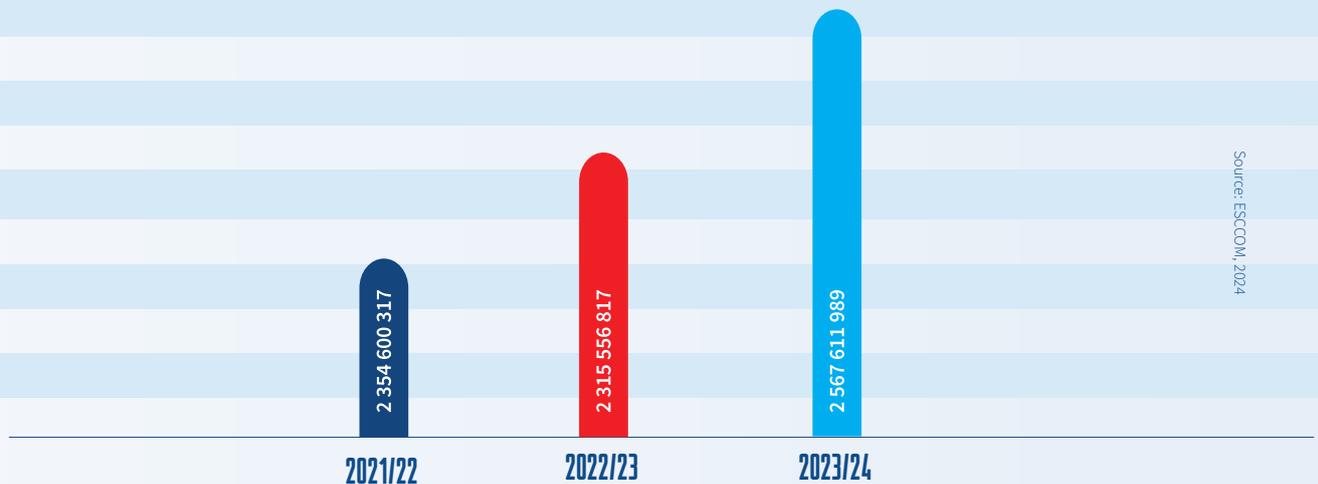
4.3.1 Telecommunications Revenue

According to the Ministry of Economic Planning and Development's Economic Review and Outlook FY 2023/24 report, consumer purchasing power was lower in the review period compared to the previous financial year 2022/23. Headline inflation was slightly higher in FY 2023/24 at 5.0 percent compared to the previous period FY 2022/23 at 4.8 percent, mainly attributed to higher food, housing and utility prices in the review period.

Furthermore, the cost of credit in Eswatini was higher in the review period with the prime lending rate at 11.0 percent, which is above the long-term 10-year average of 9.0 percent. This effectively meant that consumers were stretched financially, faced with higher market prices of food, housing and utilities as well as higher monthly loan repayments. As a result, consumers had to re-prioritise their spending despite the increasing affordability of communications services which accounted for 7.4 percent of households' consumer basket.

Total telecommunications revenue in FY 2023/24 stood at E2,567,611,980, equivalent to 3.0 percent of nominal GDP, depicting an annual growth of 9.2 percent from E2,351,556,817 in FY 2022/23. The growth was mainly driven by a rise in voice and data services revenue in the review period.

Figure 9: Total Telecommunications Services Revenue in Emalangeni

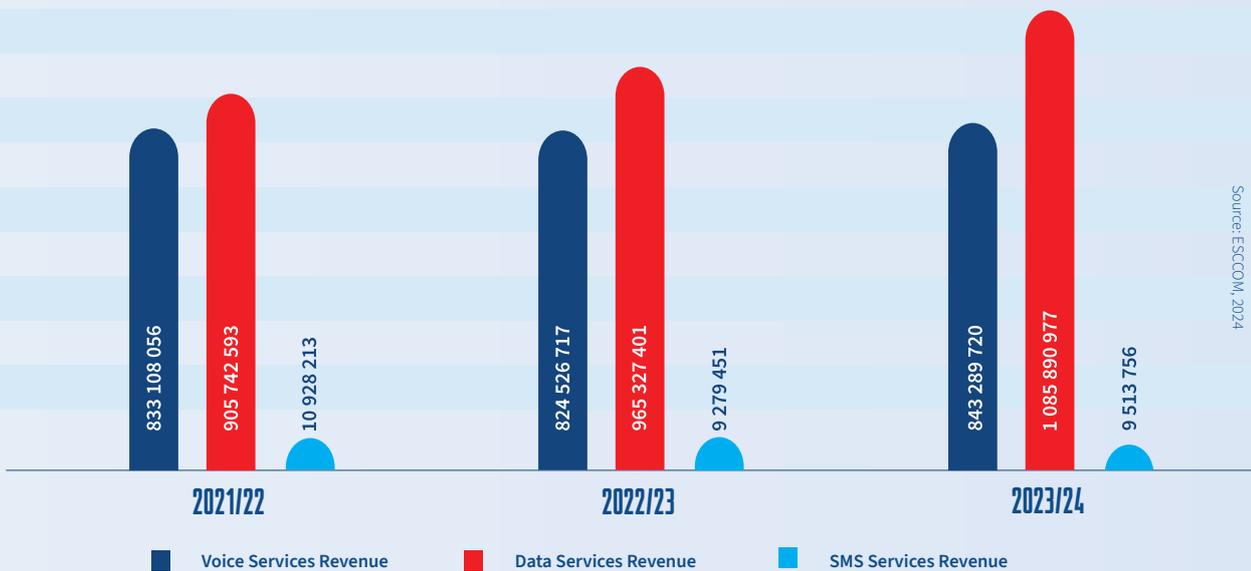


4.3.2 Telecommunications Revenue by Service, in Emalangeni

Competition in the mobile and fixed broadband market continued to grow as licensees expanded their networks' geographic coverage and revised their prices and data service offerings to gain market share. Data services continued to drive revenue growth. Moreover, operators effected price reviews for data plans for consumers amidst escalating living costs.

Data services revenue grew by 12.5 percent from E965,327,401 to E1,085,890,977, while voice services revenue recorded a growth of 2.3 percent from E824,526,717 to E843,289,720. Mobile network operators (MNOs) experienced a rise in voice revenue, and consequently, the overall increase in voice services income. MNOs offer both mobile and fixed-wireless voice services as well as bundled voice and data services, which have become a cheaper and more reliable alternative to the traditional fixed-line telephone network service that is more prone to constant disruption by vandalism and copper theft. MNOs reported an average growth of 7.2 percent in voice services revenue, while the fixed line telephone network operator recorded a decline in voice revenue of 16 percent in the review period. SMS services revenue grew by 2.5 percent from E9,279,451 to E9,513,756. SMS services revenue recovered from a dip in FY 2022/23 and recorded slow growth in FY 2023/24. There is an observed technological substitution of SMS services for over-the-top (OTT) digital communication by platforms such as WhatsApp, Microsoft Teams, amongst others. The SMS services traffic and revenue is mainly from bulk SMS services offered to financial institutions and utilities' service providers.

Figure 10: Telecommunications Revenue by Service, in Emalangeni

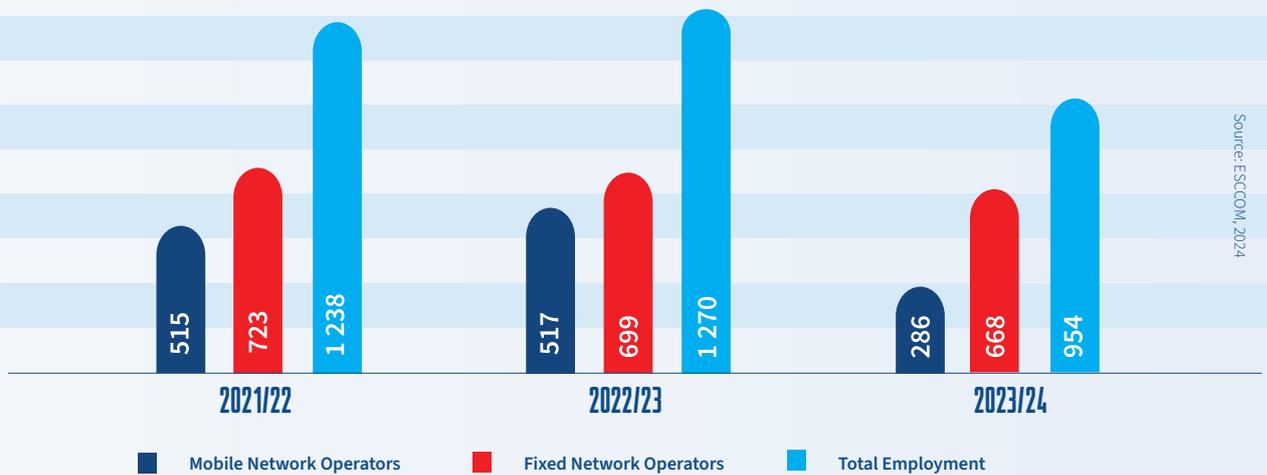


4.4 TELECOMMUNICATIONS INDUSTRY EMPLOYMENT

Total persons employed in the telecommunications industry declined by 24.9 percent from a total of 1,270 people employed in FY 2022/23 to 954 in FY 2023/24. This significant decrease in employment is attributed to one of the mobile network operators undergoing a company restructuring exercise which contributed to the significant reduction in employment numbers.

Total employment by mobile network operators declined by 49.9 percent from a total of 571 people to 286. Employment by fixed network operators also declined by 4.4 percent, from 699 to 668 in FY 2023/24, mainly attributed to natural attrition and retirement.

Figure 11: Persons Employed in the Telecommunications Industry



4.5 POSTAL AND COURIER SERVICES MARKET

4.5.1 Postal Market Indicators

The postal network in Eswatini covers an estimated 37 percent of the country's geography, comprising 37 full service permanent post offices and 53 postal service points. The period of the Covid pandemic accelerated migration from physical mail to digital communication, which re-shaped customer's communication needs and expectations. As a result, demand for physical mail services by both businesses and individuals remained sluggish.

On the contrary, parcels and packet inbound volumes benefited from the growth in online shopping through digital platforms. Additionally, the performance of the postal services market has been on a steady decline over the last few years, due to substitution by digital services. Postal services operators have therefore sought to pursue growth opportunities outside their core business, primarily e-commerce, financial services, and retail networks. The Universal Postal Union (UPU) puts strong emphasis on the need to stimulate lasting development for

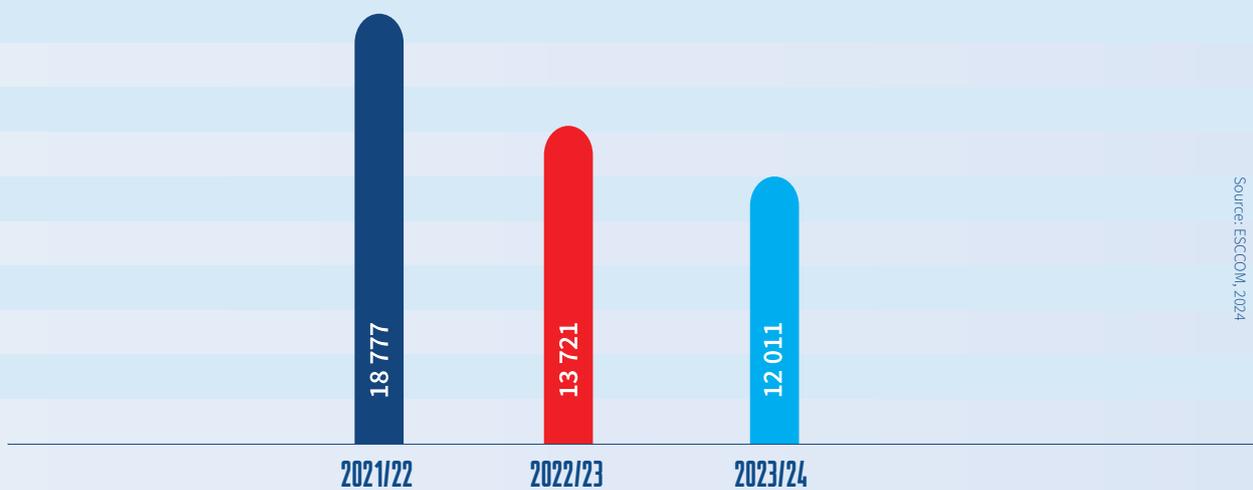
quality, efficient and accessible universal postal services, to facilitate communication between the inhabitants of the world. As such, every key postal sector stakeholder needs to play an important role in ensuring the thriving and survival of the postal services market. Governments thus need to take a lead in reducing gaps in postal development by utilizing postal networks for socio-economic development. Regulators for postal services continue to harmonize and enhance frameworks, while postal operators are expected to augment their performance through diversification and operational efficiencies.

4.5.2 Post Office Box Rental

Postal boxes rented continued a downward trend, declining by 12.5 percent from 13,721 to 12,011, out of a total of 41,150 post boxes available for rental. This implies that only about 29 percent post boxes were rented compared to 33 percent in the last period. The downward trend in the number of post boxes rented is attributed to fast growing substitution of traditional letter mail for electronic communication services which has seen consumers not renewing their post office box rentals. The decline is further attributed to the decreasing demand for physical mail services

by individual customers, which account for over 60 percent of post box rentals compared to business customers. Postal box rentals have continued to fall as consumers shift their preferences towards digital communication platforms. Individual customers continue with the use of alternative services for physical mail instead of the post box, a trend that was exacerbated during the Covid-19 pandemic. Business customers likewise have gradually adopted paperless communication alternatives to connect with clients, which is additionally rendering the post box irrelevant. Eswatini Post has revitalised its courier and package delivery service, to provide last mile shipping. The package delivery service has proven to be a financially successful model in first-world countries with established Addressing and Postcode Systems. The Kingdom is currently working on establishing its own National Addressing and Postcode system, with assistance from the UPU to facilitate an efficient and accurate addressing system.

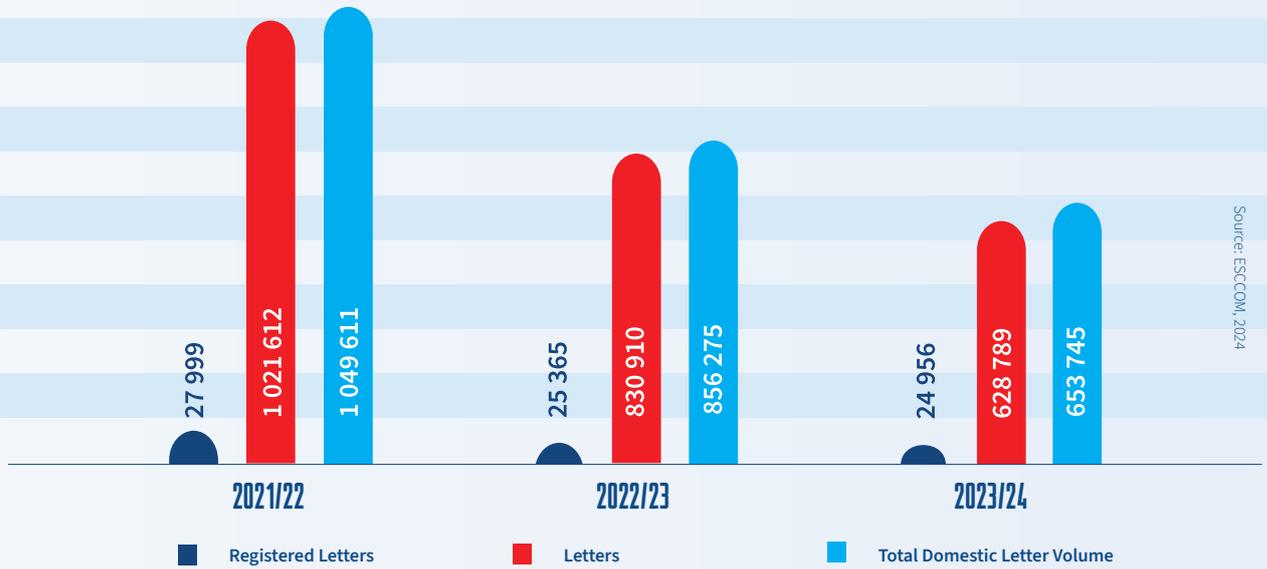
Figure 12: Number of Post Boxes Rented



4.5.3 Domestic Letter Mail

Domestic letter mail, which consists mainly of transactional mail, advertising and promotional catalogues continued a downward trajectory as businesses adopted paperless electronic services like e-mails, SMSs, and social media. Total domestic letter mail volume (comprising of registered and ordinary mail) declined by 23.7 percent from 856,275 letters to 653,745 letters. The decline was mainly driven by a by 24.3 percent decline in ordinary or unregistered letter mail volumes from 830,910 to 628,789. Registered letter mail also followed a downward trend to decline by 1.6 percent from 25,365 letters to 24,956 letters. Registered and Ordinary Letter mail volumes decreased, consistent with the decline in post office rentals due to growing digitisation of communication. Transactional mail from businesses to customers i.e. utility bills, statements and catalogues have been digitised and sent directly (and securely) to customers at lower cost compared to traditional physical mail. The drop in Registered mail was due to a reduction in customers that utilise registered physical mail services, with the trend shifting to more efficient digital communication alternatives.

Figure 13: Domestic Letter Mail Volume

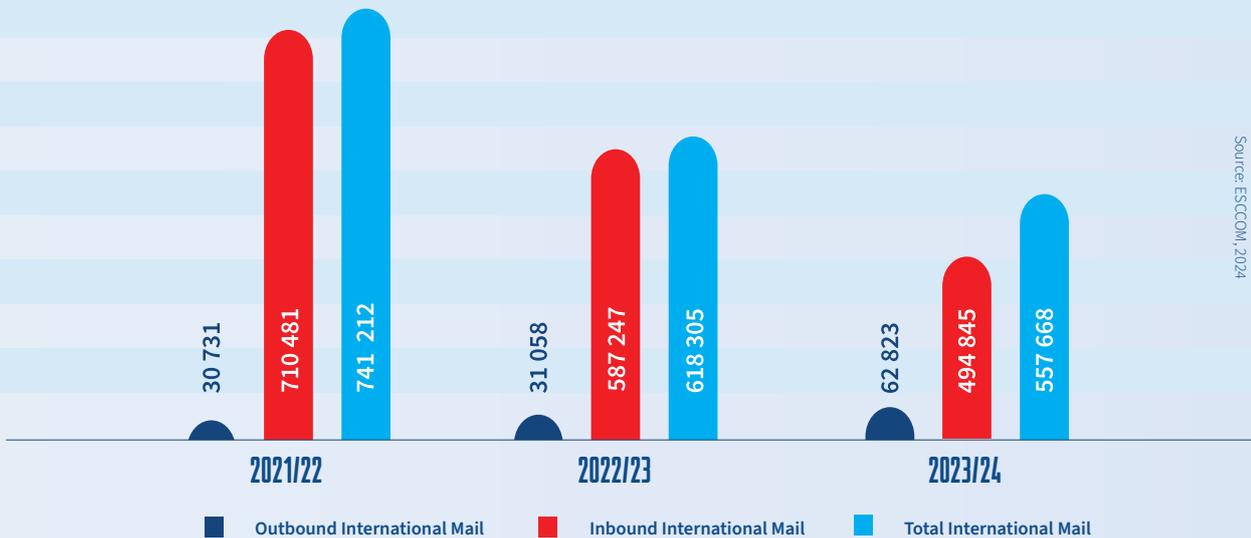


4.5.4 International Mailing Services

The downward trend in inbound international mail traffic volume continued in the review period, which mirrors the impact of increasing digital communication adoption. Total international mail traffic volumes (comprising of Inbound and Outbound International mail) decreased by 9.8 percent to a volume of 557,668 from 618,305. The overall decrease occurred despite an increase in Outbound International Mail volume by 96 percent from 32,058 to 62,823, mainly being a once off bulk international mail.

However, the 96 percent increase in Outbound International Mail volume was offset by a decline in Inbound International Mail volume by 15.7 percent from 587,247 to 494,845. The negative trend corroborates the migration from physical mail to paperless electronic communication.

Figure 14: International Letter Mail Volume



4.5.5 Express Mail Services

Express Mail volumes continued to grow, recording growth of 5.4 percent from 240 to 253. The growth in Express Mail volumes is sustained by demand for faster and secure inbound physical mail services for documents and items purchased on international e-commerce platforms. The demand is further reinforced by customers' increasing requirement for more secure and faster inbound services for documents and items purchased online.

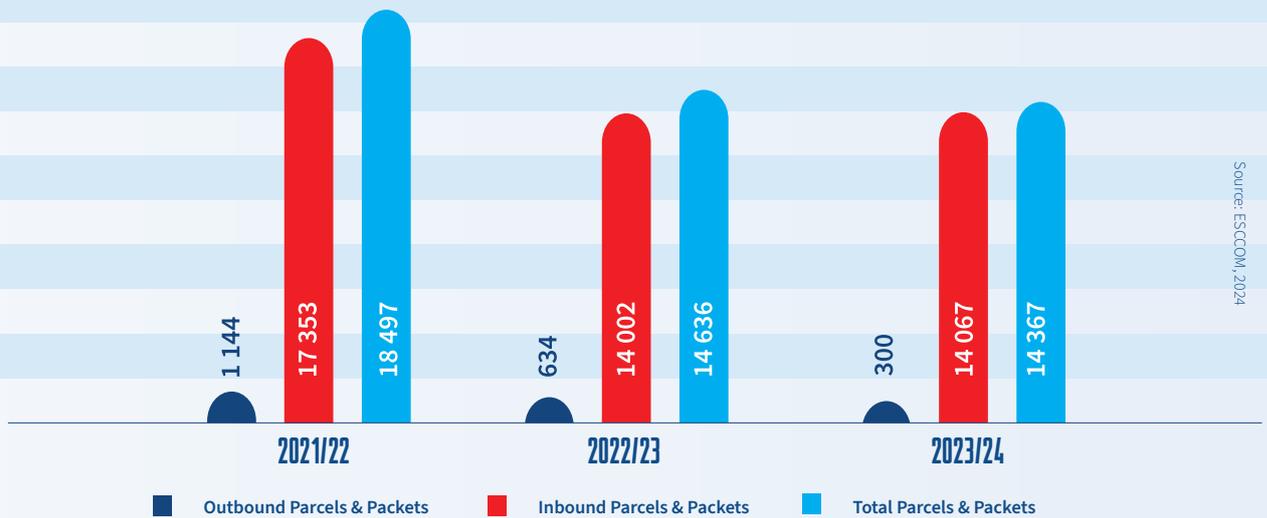
Figure 15: Express Mail Volume



4.5.6 Parcel and Packet Volumes

Parcels and packets volumes continued to fall, much against the growth expectations from the growing global trend in e-commerce. Parcels and packets declined by 1.8 percent from 14,367 to 14,363. Inbound parcels and packets volumes increased marginally by 0.5 percent from 14,002 to 14,067. This marginal increase was offset by a decrease in outbound parcels and packets by 53 percent from 634 to 300. The negative performance in parcels and packets is attributed to bottlenecks at the South African Post Office Regional Transit Centre, which then causes delays in delivery of parcels resulting in customer dissatisfaction. These had a negative impact on the quality of service (QoS) of Eswatini Post parcel services which resulted in customers seeking alternative services, thus the decline in parcel volumes. The demand for parcel and packet services has been resilient though, compared to other letter mailing services. However, like most postal service indicators, usage of the service waned in the period.

Figure 16: Parcel and Packet Volumes



4.5.7 Postal Sector Revenue

Postal services revenue, which on average is equivalent to 0,03 percent of nominal GDP, increased by 25.8 percent from E24,121,578 to E30,356,122. The growth was mainly driven by Agency Services Fees, which account for over 50 percent of total postal revenue. Agency Services Fees growth was mainly attributed to an increase in electricity units and an increase in EPTC's Agency Fees tariffs in the review period. Consequently, revenue grew by 49.9 percent from E14,055,718 to E21,070,213. Mailbox rental revenue grew marginally by 0.02 percent from E4,011,916 to E4,817,944, consistent with declining trends in the number of mailboxes rented and traditional mail volumes due to substitution for digital communication services. Revenue from the sale of stamps increased by 35.5 percent to E299,129. The substantial increase is attributed to once-off bulk international mail. There was a rise in telegraph services revenue attributed to increased awareness by customers due to intensified advertising of the services. On the downside, revenues from commissions and other income declined by 26.7 percent and 14.6 percent respectively. The decline in these revenue lines is mainly attributed to increasing market competition by other service providers offering more competitive rates.

Table 3: Postal Services Revenue by Type

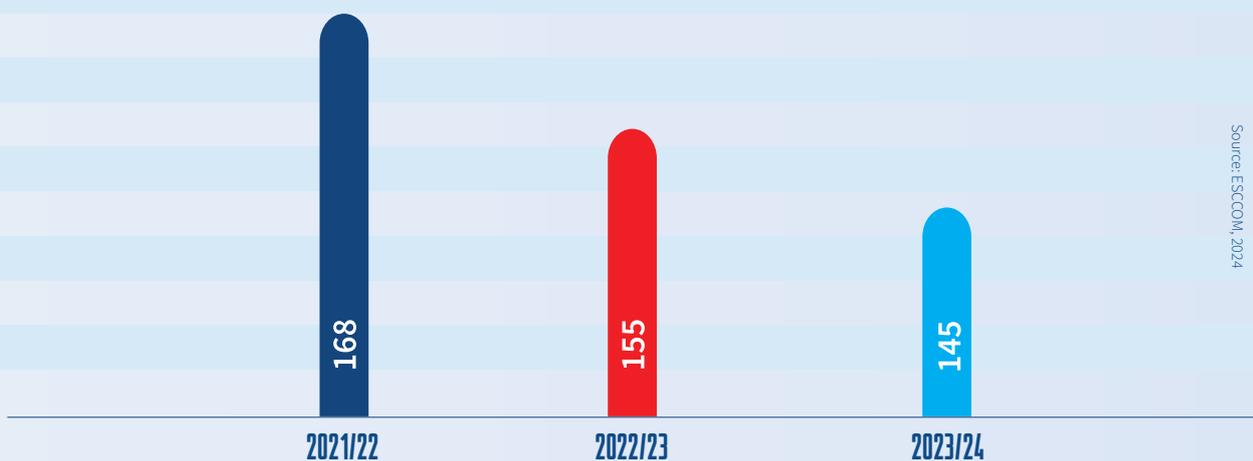
Item	2022/23	2023/24	% Change
Telegraph Services	E 48 817	E 52 089	6,7%
Sale of Stamps	E 220 749	E 299 129	35,5%
Commissions	E 141 951	E 104 119	-26,7%
Mailbox Rental	E 4 011 916	E 4 012 627	0,0%
Other income	E 5 642 429	E 4 817 944	-14,6%
Agency Services Fees	E 14 055 718	E 21 070 213	49,9%
Total Postal Services Revenue	E 24 121 578	E 30 356 122	25,8%

Source: ESCCOM, 2024

4.5.8 Postal Sector Employment

Employment in the postal sector continued a downward trajectory, falling by 6.5 percent from 155 to 145 persons employed. This was mainly due to natural attrition without replacement as Eswatini Post's cost management strategy was such that resigning and retiring employees would not be replaced, which resulted in lowered numbers of postal services employees.

Figure 17: Persons Employed in the Postal Sector



Source: ESCCOM, 2024

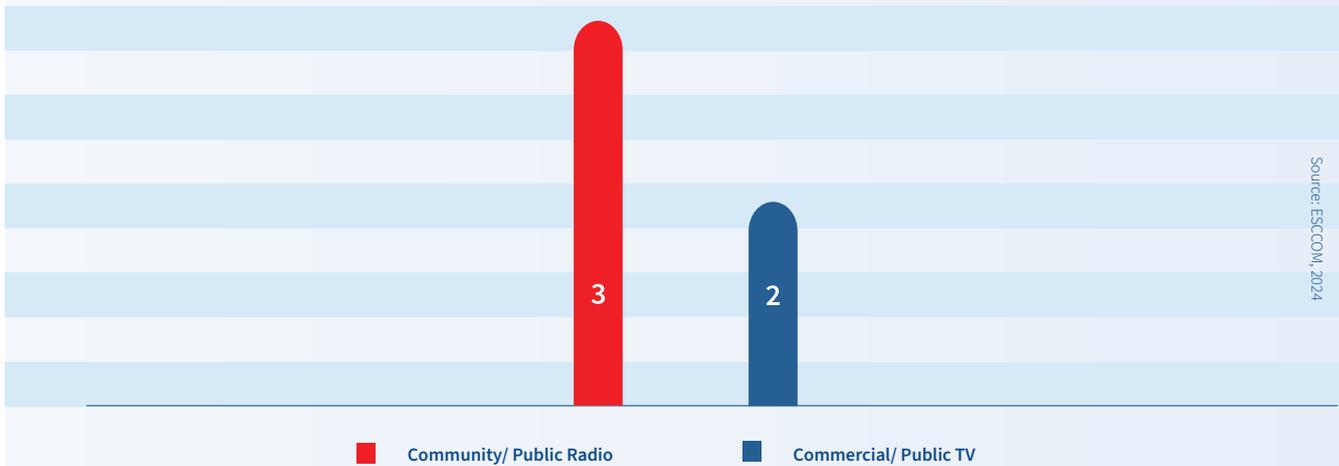
4.6 BROADCASTING MARKET

The ICTAUS demand-side survey of 2022 unearthed that approximately 46.7 percent households owned a radio, with more ownership in rural compared to urban areas. About 89.2 percent households receive a signal from local radio stations, with about 54.5 percent households owning a television set. Nearly 25.3 percent citizens receive television signals from local television stations, while 77.8 percent households have multichannel signal. Likewise, radio coverage is at 95 percent while television (TV) coverage stands 86 percent. The broadcasting sub-sector in Eswatini is estimated to account for approximately 12 percent of the ICT Sector GDP and 0.2 percent of national GDP.

4.6.1 Number of Broadcasting Licenses Issued by Type

The total number of broadcasting licensees remained unchanged at five (5). There is one (1) Operational Public Broadcasting Radio Licensee, and two (2) Community Broadcasting Radio licensees in the market. The list is completed by one (1) Commercial Television station and one (1) Public Television Licensee. The Kingdom has twenty-two (22) transmission sites for radio, with two (2) Free-to-Air Television Licensees operational in the market. The Television industry has eighteen (18) Digital Terrestrial Stations with one (1) Signal Distributor and two (2) Content Distributors. Additionally, the country has thirty-five thousand (35 000) set-top boxes.

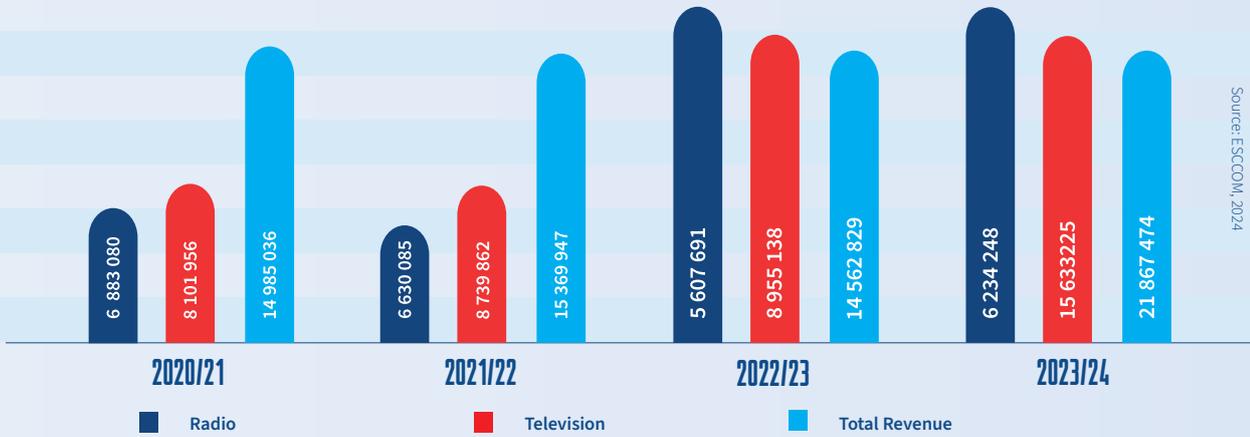
Figure 18: Number of Broadcasting Licenses Issued by Type



4.6.2 Broadcasting Revenue

Total revenue generated by the broadcasting sector amounted to E21,867,474, an increase of 50.2 percent from E14,562,829. The substantial growth in broadcasting sector revenue is attributed to an almost two-fold surge in revenue reported by television broadcasting licensees in FY 2023/24 at E15,633,225 from E8,955,138 in FY 2022/23. Revenue recorded by radio broadcasting licensees amounted to E6,234,248 in FY 2023/24, an increase by 11.2 percent from E5,607,691 in FY 2022/23. Sources of revenue for broadcasting licensees are mainly commercial advertising, general announcements and sponsored programmes.

Figure 19: Broadcasting Market Revenue in Emalangeni



4.6.3 Broadcasting Licensees Market Share by Revenue

In terms of market share by revenue, the Television broadcasting market is dominated by the public TV broadcaster, Eswatini TV with 81 percent market share, while the commercial broadcaster Channel yeMaswati holds 19 percent. In the radio market, the community radio broadcaster, Voice of the Church (VOC) holds significant market share at 66 percent while the public radio broadcast station, Eswatini Broadcasting and Information Services (EBIS) holds 34 percent market share.

Figure 20: Broadcasting License Revenue Market Share



4.6.4 Number of Broadcasting Productions

The number of broadcasting productions rebounded in the review period to increase by 0.5 percent from 10,517 to 10,573. The broadcasting sector has been gradually recovering from the effects of the Covid pandemic as observed through the growth in broadcasting indicators over the reporting period.

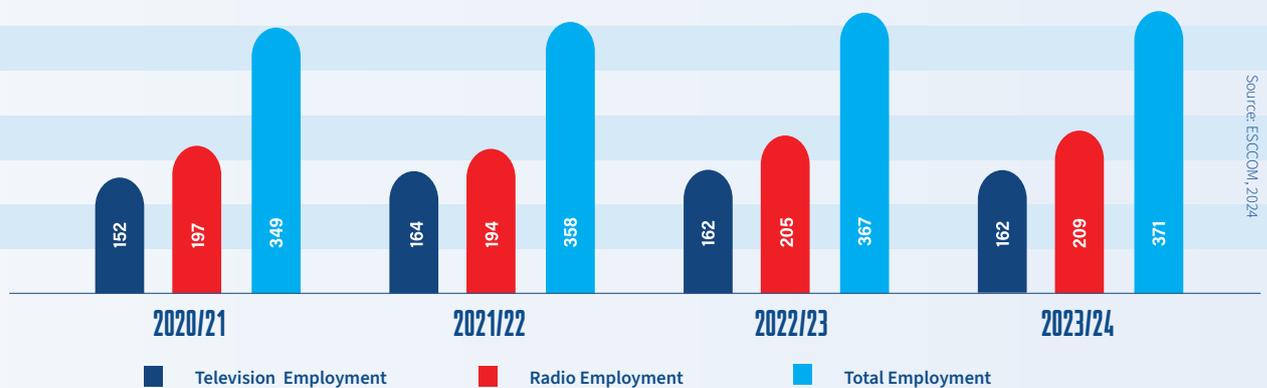
Figure 21: Number of Broadcasting Productions



4.6.5 Broadcasting Sector Employment

Employment in the broadcasting sector increased from 367 to 371, an annual increase of 1.1 percent. The growth is attributed to a rise in employment figures in radio stations from 205 to 209 personnel. Expansion of scope and the need for adequate staff to efficiently execute operations has contributed to the improvement in hiring of radio broadcasting personnel over the years. Employment in television broadcasting remained unchanged at 162 in the period under review.

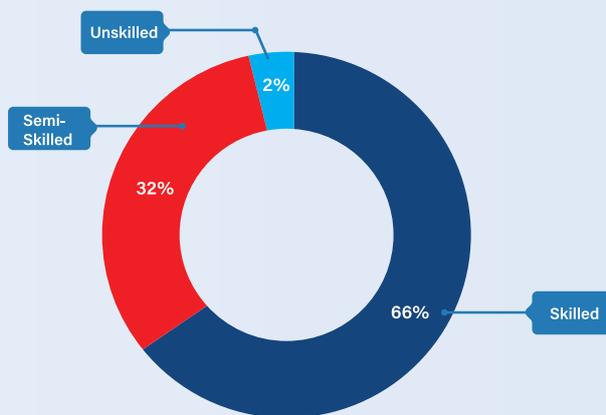
Figure 22: Broadcasting Sector Employment



4.6.6 Skill Levels in the Broadcasting Sector

An analysis of the broadcasting sector showed that 66 percent of broadcasting personnel are skilled, 32 percent semi-skilled, and only 2 percent are unskilled. While unskilled labour does not require particular training and skills, skilled jobs require specialised training, experience and competencies. Semi skilled positions, on the other hand, require employees to have a standard level of knowledge and skills.

Figure 23: Broadcasting Sector Employment by Skillset



Source: ESCOM, 2024

4.7 COST TO COMMUNICATE

Two telecommunications operators, being Eswatini Mobile and Eswatini Posts and Telecommunications Corporation (EPTC) reduced their out of bundle voice tariffs. Eswatini Mobile reduced out of bundle voice tariffs for both peak and off-peak calls by 50 percent while EPTC reduced on-net peak and off-peak tariffs by 60 percent and 50 percent respectively. Conversely, EPTC reduced off-net peak and off-peak tariffs by 75 percent. Table 5 depicts the monetary value tariff reduction by the operators.

Table 4: National Leased Lines Wholesale Rates Reduction

	Eswatini Mobile		MTN			EPTC (On-net)		EPTC Off-net (Mobile)			
	Old Tarrif	New Tarrif		Old Tarrif	No Change		Old Tarrif	New Tarrif		Old Tarrif	New Tarrif
Peak	1.10	0.55	Peak	1.20	1.20	Peak	1.00	0.40	Peak	2.00	0.50
Off- Peak	0.66	0.33	Off- Peak	0.60	0.60	Off- Peak	0.50	0.25	Off- Peak	1.00	0.25

4.7.1 Reductions to the Price of Data

Since the introduction of the Price Transformation program in 2017, the price of data has been on a downward trend. The regulator continued to advocate for affordable communication services through engagements with retailers and comprehensive adjudication of products and services' applications proposed for launch into the market. The Commission continued to engage operators in efforts to advocate for affordable services. Figure 21 depicts the Out of Bundle (OOB) rate for the MNOs, Eswatini Mobile (ESM) and MTN. The OOB price of data remained constant for both operators. MTN charges E0.49/MB whilst ESM charges E0.25/MB, which is the lowest OOB rate in the mobile market of Eswatini.

Figure 24: Out-of-Bundle Rates charged by MNOs (in SZL currency)



The Commission continued with endeavors to reduce the cost of communication. This resulted in operators implementing a pricing philosophy where data offered to customers was increased while the price remained constant. For instance, MTN increased the data offering from 1GB to 1.2GB while the price remained at E99. The approach enabled consumers to access more data at the same price as previously charged, which enabled them to stay connected for longer periods. Eswatini Mobile offers 1.5GB of data for E100. The demand for data has been constantly mounting, attributable to increased consumers' data appetite.

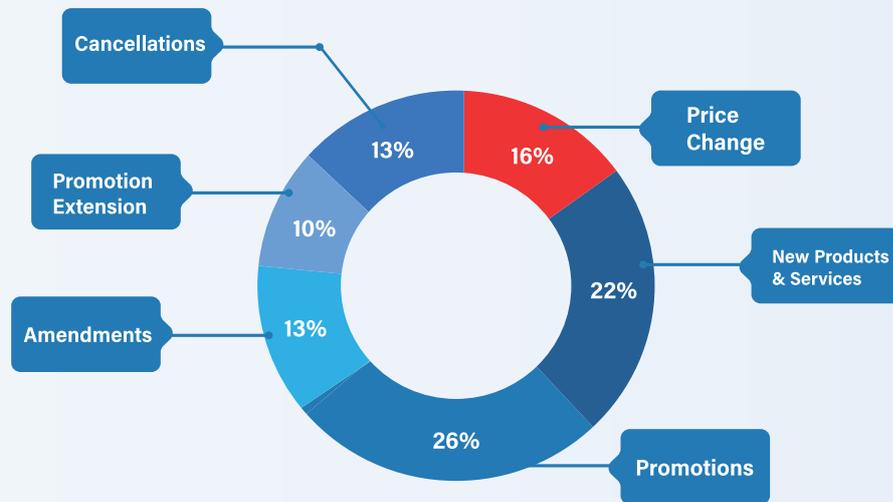
4.7.2 Approval of Products and Services

Section 7(v) of the ESCCOM Act, 2013 prescribes the establishment of a pricing system to protect end-users from excessive price increases and to avoid unfair price competition. This regulatory initiative is aimed at ensuring protection of consumers in the ICT market and the prevention of anti-competitive practices, such as predatory and excessive pricing, amongst others, which may result in the distortion of market dynamics. Accordingly, all product, service and price review requests are thoroughly assessed to ascertain their impact on the market before they can be launched. Such applications may include requests to launch new products and services, proposals for price reviews, assessment of promotions, amendments to terms and conditions, as well as cancellations for redundant products. Some of the key factors considered in the process include affordability, consumer interests, and competition.

The Commission continued to execute its general mandate of economic regulation of the telecommunications market regarding competition and the cost of communication through price regulation in adjudicating products and services applications submitted by licensees for approval. Of the new products and services introduced in the market, some were new offerings launched by the three (3) new entrants into the market, being the ISPs; Chakaza Holdings, Glimmertech and Starlink. All three service providers offered packages targeting both residential and business customers.

Twenty-two (22) percent of the applications adjudicated in the reporting period were new products and services designed for both business and residential customers. Licensees additionally streamlined existing service offerings, in response to the ever-changing consumer needs and product performance through product modification. This was done through increasing data volumes and capacity (speed) without changing the price of the product whilst for others, the price was reduced while the data volumes were kept constant. To ensure that communication costs remain affordable, service providers launched promotions that enabled customers to stay connected to the internet for longer periods by offering bonus data on bundles purchased. In furtherance to that, promotions offering more talk time through voice bundles were launched in the period under review. Figure 23 depicts a breakdown of the products and services approved.

Figure 25: Products and Services Launched



Source: ESCCOM, 2024

4.7.3 Broadband Targets 2025

The government of Eswatini works in collaboration with other stakeholders such as SADC in fulfilling the UN Broadband Commission's targets. The Broadband Commission is a collaboration between the International Telecommunications Commission (ITU) and the United Nations Educational, Scientific and Cultural Organization (UNESCO). Target 2 of the Broadband Commission's Goals require developing economies to make broadband affordable i.e., to have entry level broadband services priced at less than 2 percent of the country's monthly Gross National Income (GNI) per capita. GNI per capita is universally viewed as a strong indicator of the standard of living for an average citizen in a country.

By 2025, broadband penetration should reach 75% worldwide, 65% in low and middle income countries, and 35% in the least developed countries.

An exercise was conducted using the five ITU price baskets to determine the extent to which the Kingdom of Eswatini is meeting the Target. The analysis found that Eswatini has met the set target on three (3) Baskets, which are the Fixed Broadband (5GB) Basket (at 2 percent), Mobile Data and Voice Low Consumption Basket (at 1 percent) and the Mobile Cellular Low Usage Basket (at 1 percent). Eswatini is ranked 2nd in the SADC region on Fixed Broadband whereas for the mobile baskets, the country is ranked in positions 5 and 6.

Table 5: ITU Price Baskets

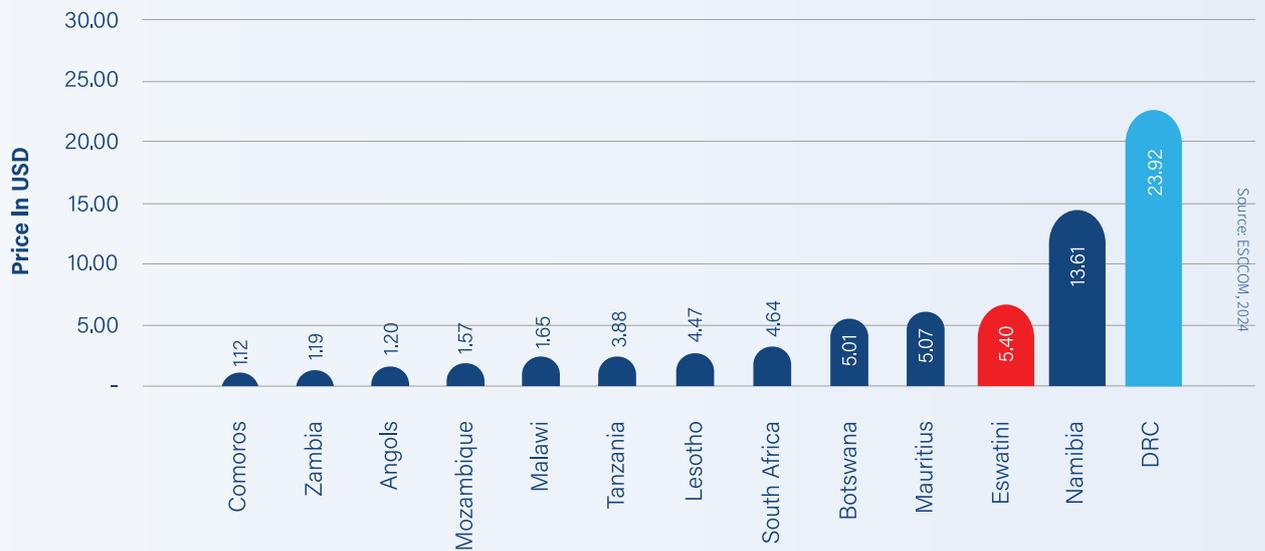
ICT Price Basket	Minimum Monthly Allowance			Broad-band Target	As a Percentage of GNI			Eswatini Ranking in SADC
	Voice (minutes)	Number of SMS	Data		2022	2023	2024	
Data Only Mobile Broadband Basket	-	-	2GB	2%	4%	4%	4%	6
Mobile Data and Voice (Low Consumption Basket)	70	20	500MB	2%	3%	2%	2%	5
Mobile Data and Voice (High Consumption Basket)	140	70	2GB	2%	6%	5%	4%	6
Mobile Cellular Low Usage Basket	70	20	-	2%	2%	1%	1%	6
Fixed Broadband Basket	-	-	5GB	2%	14%	13%	4%	2

Source: ESCCOM, 2024

4.8 PRICE OF 1GB DATA FOR SELECTED SADC MEMBER STATES

A comparison of the price (in \$ US) of 1GB of data in Eswatini against selected peer SADC member states measuring the price competitiveness of data in the region was undertaken. The price 1GB of data in the country slightly moved from USD 5.82 to USD 5.40 in the review period. From the comparison, Eswatini ranked third highest after Namibia and the Democratic Republic of Congo as at end March 2024. The fluctuations in the USD/SZL exchange rate had an impact on the average cost of data. The assessment depicts that the cost of data remains relatively high, therefore initiatives to reduce the cost of communication remain on course.

Figure 26: Price of 1GB in SADC Member States in USD (as of 31 March 2024)



Source: ESCCOM, 2024

4.9 SPECTRUM LICENCING

One of the Commission's regulatory functions is the duty to safeguard the use and allocation of the radio frequency spectrum. Users of the radio frequency spectrum are licensed and their compliance with the set licence obligations monitored. The number of spectrum licences issued continued to increase in the review period by 20 percent from 44 to 53. The development was largely due to businesses exhibiting interest in offering services in this part of the ICT sector.

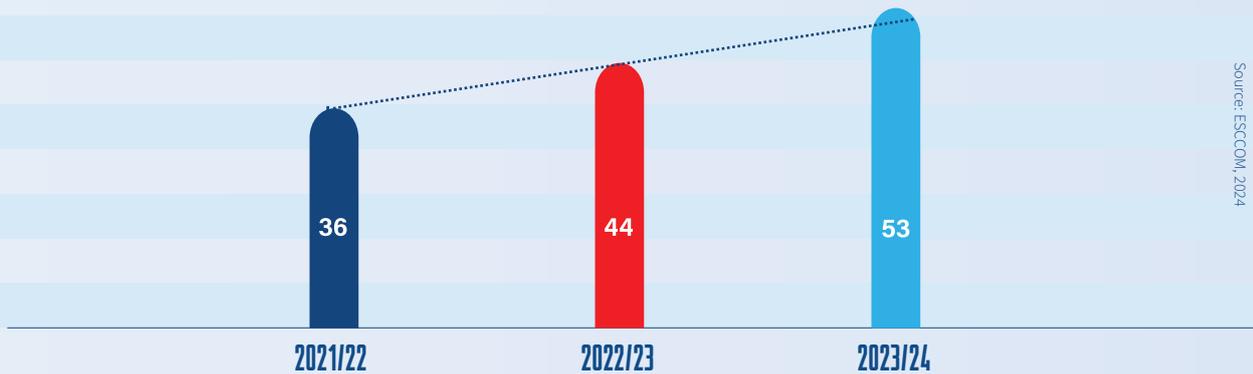
Figure 27: Number of Spectrum Licenses Issued

Service Class	Licenses issued		
	2021/2022	2022/2023	2023/2024
Amateur Station	6	3	4
Aeronautical	14	21	17
Sound Broadcasting	2	3	3
Microwave links	2	4	4
IMT	3	2	0
Private Mobile Radio Station (PMR)	3	4	17
VSAT	6	7	8
Total	36	44	53

Source: ESCCOM, 2024

Furthermore, monitoring and compliance checks were undertaken to ensure that spectrum users conform to licence conditions and regulations regarding the use of spectrum. Through this process, defaulting spectrum users were identified, and corrective regulatory measures undertaken.

Figure 28: Total Number of Spectrum Licences Issued



4.10 EQUIPMENT TYPE APPROVAL

Type approval is the process by which communications equipment, such devices and systems, are authorised to be imported into the country. The process involves verification of the equipment's compliance with the applicable standards and other regulatory requirements. Type approval is aimed at ensuring the safety and protection of consumers when utilising technological equipment, as well as ensuring that the quality and integrity of communication services is maintained through using quality end-user communication terminals. Dealers and agents continued to lodge applications for type approval of communications equipment. Table 8 summarises the applications submitted, approved and certificates issued.

Table 6: Summarises the number of applications that were approved and certified

Year	Number of Type Approved Equipment	Average Number of Approvals per Month
2021/22	241	20
2022/23	216	18
2023/24	245	21

Source: ESCCOM, 2024

The analysis revealed a rebound in the number of applications for type approval of equipment, an increase of 13.4 percent from 216 to 245, with an average of 21 approvals per month. Figure 29 depicts the foregoing.

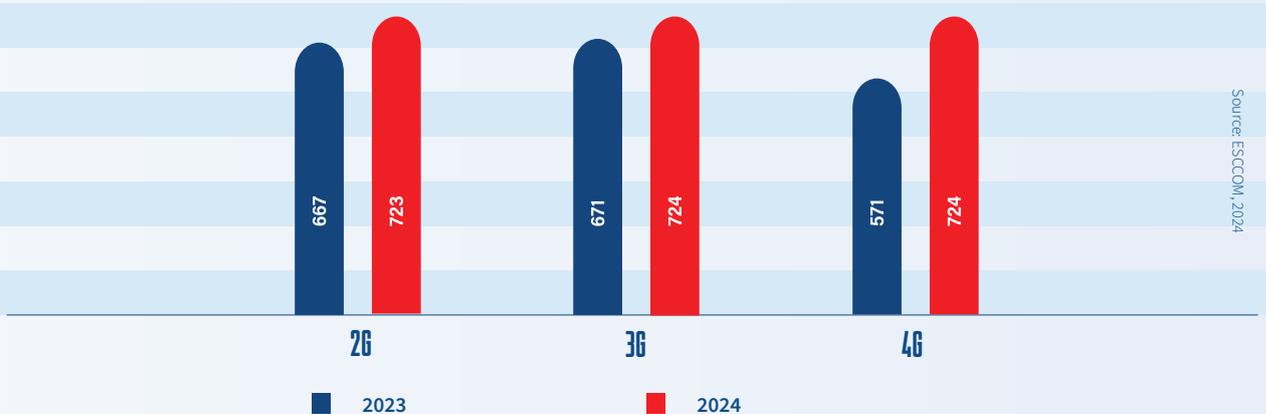
Figure 29: Total Number of Type Approved Equipment



4.11 ICT INFRASTRUCTURE AND COVERAGE

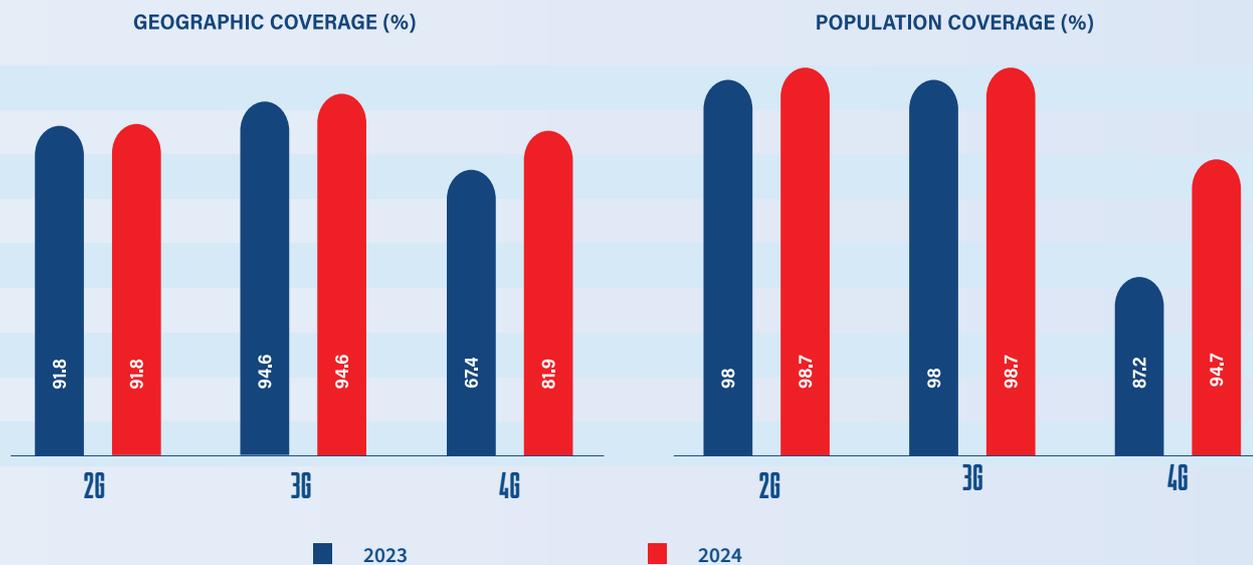
In an increasingly connected world, digital connectivity has become essential for the economy, thus dependable universal communications networks are an imperative. The country's citizens have become dependent on digital communications services; therefore, it is essential that secure and resilient networks are deployed. Network coverage continued to increase for the various categories, demonstrating sustained infrastructural investment by operators, coupled with network expansion initiatives by the Universal Access Service Fund. Between the two MNOs operating in the market, the incumbent operator rolls out coverage for 2G, 3G and 4G networks whereas the late entrant in the market rolls out network from 4G LTE technology specifically. The introduction of the 5G network is still being tested.

Figure 30: Number of Base Transceiver Stations by Technology



The 2G network has 91.8 percent geographic coverage and population coverage of 98.7 percent, while 3G covers 94.6 percent of the geographic landscape with the same population coverage as 2G. 4G geographic coverage improved from 67.4 percent to 81.9 percent with population coverage moving from 87.2 percent to 94.7 percent.

Figure 31: Mobile Network Coverage by Technology



4.12 MOBILE NETWORK PERFORMANCE

As data usage and dependence on connectivity continue to grow rapidly, it is critical that networks deliver reliable performance to meet the users' needs. This requires that these services are always available to customers at the right and acceptable quality. A network performance assessment for the Mobile Network Operators was conducted for the past year (January - December 2023) comparing the performance with previous years (2021 and 2022) to assess and analyse the operators' compliance with the Quality-of-Service regulations and license terms and conditions, and to identify trends, successes, and areas for improvement. The Commission conducted this exercise in line with its mandate to ensure that all communications services are provided in a manner that will best promote economic and social development.

4.12.1 Mobile Voice Traffic

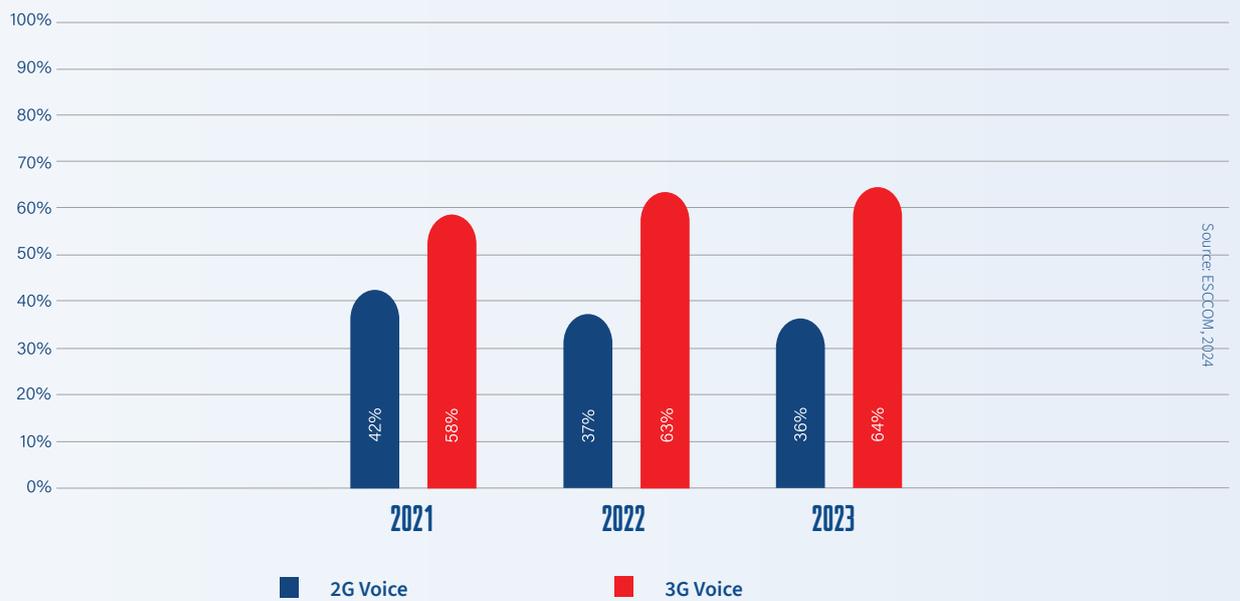
For Eswatini Mobile, total voice traffic transited on its network increased by 47 percent in the year 2023, while the previous year (2022) growth was 128 percent. The 3G network dominated voice traffic in the year 2023, accounting for 86 percent of the total voice traffic while 2G accounted 14 percent of the total voice traffic. About 5.8 percent of the total voice traffic for Eswatini Mobile was generated from Universal Access and Service (UAS) sites.

Figure 32: Eswatini Mobile Network Voice Traffic



In the case of MTN Eswatini, total voice traffic decreased by 2.9 percent in the year 2023, while the previous year's (2022) traffic also dropped by 3.4 percent. 2G traffic decreased by 4.2 percent while 3G also decreased by 2.1 percent in the year 2023. About 60 percent of the total voice traffic was generated on the 3G network while 4.4 percent of the total voice traffic came from UAS sites. Overall, 3G voice traffic dominates the MTN networks.

Figure 33: MTN Eswatini Network Voice Traffic



It is observed that with the decreasing voice traffic on 2G and almost stable 3G traffic, the scope for future voice traffic growth lies in 4G/5G adoption. The Commission is therefore looking forward to the enabling of Voice over Long-Term Evolution (VoLTE) as well as the phasing out of the 2G/3G wireless networks by operators.

4.12.2 Mobile Data Traffic

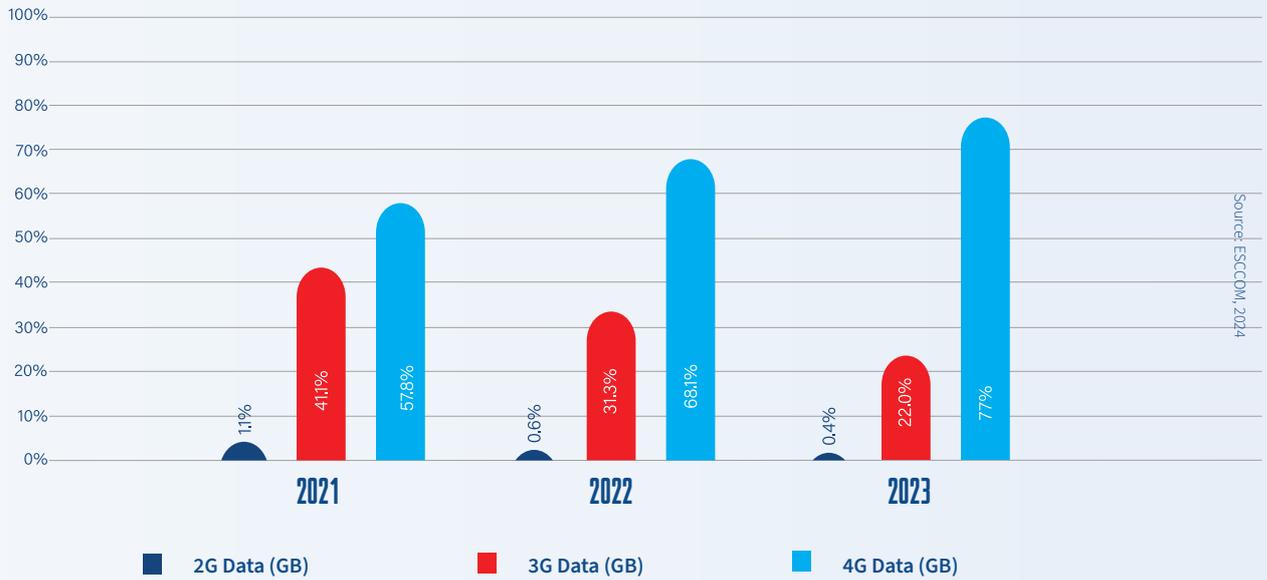
Eswatini Mobile's total data traffic increased by 40.9 percent in the year 2023. 4G traffic grew by 57.4 percent while 3G traffic decreased by 0.1 percent. About 79.7 percent of the total data traffic for the year 2023 was generated on the 4G network, while 3.4 percent of the total data traffic came from UAS sites. Total data traffic was 25,154 TB, a growth of 40.9 percent from the previous year's total data traffic. The growth of 4G data traffic has been significant, surpassing the growth rate of 3G data traffic. While there has been a continuous and significant growth of 4G traffic (which grew by 57.4 percent in 2023), 3G traffic slightly decreased by 0.1 percent. The 79.7 percent data traffic generated on Eswatini Mobile's 4G network in 2023 translates to 20,075 TB while 20.2 percent was on 3G (5,079 TB), and 0.1 percent was on 2G traffic (37 TB).

Figure 34: Eswatini Mobile Network Data Traffic



Correspondingly, MTN Eswatini's total data traffic increased by more than 50% Year-On-Year (YOY) from 2021 to 2023. 4G traffic grew by 49.3 percent while 3G traffic decreased by 8.1 percent in 2023. The total data traffic for the year 2023 was 22,169 TB. Approximately 77.7 percent of the total data traffic for the year 2023 was generated on the 4G network, of which 1.3 percent came from UAS sites. Essentially, 77.7 percent of the data was 4G traffic (17,219 TB) while 22 percent was on 3G (4,871 TB), and 0.4 percent was on 2G (79 TB). 2G data traffic is steadily becoming insignificant as the years go by with a contribution of 0.4 percent in the year 2023. At this rate, 2G networks could see minimal usage and may be decommissioned in the next few years.

Figure 35: Eswatini Mobile Voice Traffic



4.12.3 Data Traffic & Usage

The total data usage as recorded by MTN between June and December 2023 was 6,377,061 GB (6,377 TB). The Top 34 visited websites, which accounted for 90 percent of the total data volume for the year were analysed. The results showed that social media is the biggest contributor to data usage at around 41 percent, indicating that users are highly engaged on platforms like Facebook, WhatsApp, TikTok, Instagram, amongst others. The Commission is already in talks with content providers (Google) to host their servers in country to reduce international bandwidth requirements and costs.

Table 7: Data Usage Summary

Category	Total Data (GB)	Percentage %
Social media	2 404 513	41,58%
Streaming	1 600 608	27,68%
Enterprise Solutions	350 011	6,05%
Apple Products	337 228	5,83%
Search Engine	336 672	5,82%
Cloud Solutions	267 852	4,63%
Adult Content	203 108	3,51%
Gaming	198 721	3,44%
Samsung Products	65 424	1,13%

Source: ESCCOM, 2024

Data usage and user trends were observed to monitor traffic for better informed decision making. Key aspects noted from the monitoring were that:

- Social media is the biggest contributor to data usage at over 50%, indicating that users are highly engaged on platforms like TikTok, Facebook, amongst others;
- There is limited availability and consumption of local content; and
- The hosting and presence of content providers (Google/YouTube, Facebook, Amazon, etc.) in country to reduce international bandwidth requirements and costs could be beneficial to the industry.

Figure 36: Traffic Monitoring Dashboard

Application/ proto: port	Category	Risk	Bytes	Percent
Secure Socket Layer Protocol	Infrastructure	1	527.12 GB	21.79%
Tik Tok	Mobile Applications	4	509.19 GB	21.05%
Youtube Video Streaming	Streaming Media	3	459.75 GB	19%
Facebook Website	Social Networking	3	449.66 GB	18.59%
Whatsapp File Transfer	Mobile Applications	3	111.6 GB	4.61%
Xvideos Streaming	Streaming Media	2	66.22 GB	2.74%
Others	Unclassified	?	60.13 GB	2.21%
Netflix Website	Streaming Media	3	39.81 GB	1.65%
HTTP	General Internet	1	26.26 GB	1.09%
XNXX	Streaming Media	1	25.67 GB	1.06%
Instagram Visual Media	Streaming Media	1	24.91 GB	1.03%
Youtube Website	Streaming Media	3	24.83 GB	1.03%
Multi Thread File transfer	File Transfer	3	15.23 GB	0.63%

Source: ESCOM, 2024

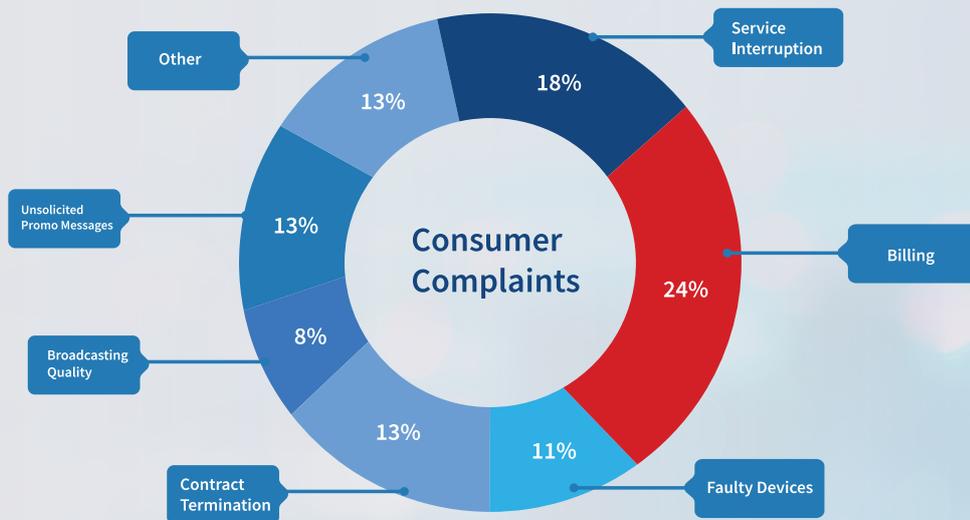
Furthermore, it is observed that the Commission has managed to break the digital divide and provide more of Eswatini with access to internet services and network coverage through initiatives such as the UAS fund. There has been improvement in nationwide geographic and population high-speed mobile network coverage. Advancement in network performance has relieved network congestion in certain areas, resultantly, there has been an increase in data revenues due to increased network coverage.

4.13 CONSUMER COMPLAINTS

Disputes intermittently arise in the process of executing the service agreement between service providers and the consumers. A complaints resolution mechanism is in place to deal with such issues, where the service provider is the first point of contact for aggrieved consumers to seek reprieve. Thereafter, the matter may be escalated to the regulator if it remain unresolved.

Thirty-eight (38) complaints against service providers mainly in the telecommunications sector were considered over this period. Most of these related to service interruption and billing. All of them were resolved, following engagements with the relevant operators.

Figure 37: Consumer Complaints



Source: ESCCOM, 2024



SELECTED DEVELOPMENTS IN THE ELECTRONIC COMMUNICATIONS SECTOR

05

5.1 POSTAL SECTOR

5.1.1 National Addressing and Postcode Systems Project

The National Addressing and Postcode System Project has made significant progress, embarking on the phase of developing a national addressing standard. By developing a robust and standardized addressing system, the National Addressing and Postcode System Project seeks to enhance the efficiency of mail delivery, improve emergency response services, facilitate accurate navigation and location-based services, and support overall national development initiatives.

To ensure the success of this phase, the Commission collaborated with ESWASA (Eswatini Standards Authority) and key stakeholders to form a Technical Committee for the project. The

scope of the project encompasses the creation of a conceptual model, specifically a profile of standard ISO 19160-1, Addressing, Part 1 of which is the Conceptual model. The profile of the standard will outline types of addresses currently in use in Eswatini. Utilizing the Unified Modelling Language (UML), the address classes will be presented, accompanied by comprehensive descriptions to provide a clear understanding of the various address types utilized within the country.

Furthermore, the project aims to deliver recommendations for addressing best practices in Eswatini and the implementation of an addressing governance framework. These recommendations will serve as guidelines for ensuring the proper management and governance of addresses in Eswatini, promoting efficiency, accuracy, and consistency in the addressing system.



5.1.2 Development of National Postal Sector Policy

The development of the Postal Sector Policy is of critical importance in the country as it will serve as a guiding framework for the postal sector in Eswatini, fostering efficiency, growth, and improved service delivery. The policy is aimed at addressing key aspects of the postal sector in Eswatini which include critical areas such as infrastructure development, regulatory frameworks, service quality, and innovation within the postal industry. ESCCOM in collaboration with the Ministry of ICT and the Universal Postal Union (UPU), enlisted the assistance of a consultant to facilitate the drafting of a comprehensive policy. From this work, a draft Policy Analysis Report was compiled. The draft report was shared with the Ministry and was approved by the relevant authorities. With the report finalized by Eswatini, it was formally submitted to the UPU for endorsing.

The Kingdom of Eswatini is committed to the development of the Postal Sector Policy, utilizing the valuable insights and recommendations provided in the Policy Analysis Report. ESCCOM is actively engaging with the UPU to secure funding and necessary resources. The involvement of the UPU is expected to contribute significantly to the successful formulation of the Postal Sector Policy, ensuring alignment with international best practices and standards.

5.1.3 e-Trade Readiness Assessment and Development of E-Commerce Strategy for Eswatini

E-commerce has, in many countries, proven to be a powerful driver of economic growth, inclusive of trade and job creation. However, due to economic, infrastructural, human, and financial constraints resulting from digital divides, numerous developing countries including Eswatini, are lagging in terms

of their readiness to engage in and take advantage of the benefits of e-commerce and the digital economy.

The Ministry of Information, Communications, and Technology (MICT) together with the Ministry of Commerce, Industry and Trade (MCIT), in partnership with Eswatini Communications Commission (ESCCOM) and Africa Rise, a European Union (EU) funded facility, launched an Assessment of Eswatini's E-Commerce Readiness whose objective was to provide a comprehensive diagnostic of the country's e-commerce ecosystem, mainly highlighting strengths and weaknesses. The assessment phase of the project has been successfully completed, and the final report has been published and widely disseminated through various communication channels, including those of the Commission and Africa Rise.

The report includes an Action Matrix that outlines specific steps and measures to be implemented by relevant stakeholders. The Commission has actively engaged with stakeholders to ensure their understanding and involvement in the Action Matrix. Further updates have been made to the Matrix, reflecting the progress made thus far in implementing the recommended actions. Government prioritizes the drive to execute these actions and foster collaboration among stakeholders to realize the potential of e-commerce. The Commission has reached out to various international agencies, including the World Bank, GIZ (The Deutsche Gesellschaft für Internationale Zusammenarbeit), and the International Trade Centre in ensuring the successful formulation and implementation of the E-commerce National Strategy.

5.2 BROADCASTING

The development of regulatory frameworks for the Broadcasting sector continued in the review period. These consists of the following regulations which are in draft format, Broadcasting: Content, Community Broadcasting, Licensing, Quality of Service, Digital and other Broadcasting Networks Regulations and services as well as the Model

Editorial Policy. To capacitate broadcasters, the Commission presented studio production equipment to Eswatini Television Authority (ESTVA) to assist ESTVA in the production of more high-quality local content that will increase the diversity in the programmes offered by the station and in upholding the station's mandate of informing, educating and entertaining Emaswati. ESCCOM further handed over a state-of-the-art digital content production studio to the Deaf community in Eswatini. The studio will be used to produce content for the Deaf community which includes educational content, religious content, and other types of content.

A project of acquiring a Network Monitoring System (NMS) for the Digital Terrestrial Television (DTT) operator was initiated in the period. The system is crucial in that it avails the ability to monitor, in real-time, all network facilities, particularly transmitters in the network to the operator. This will help in ensuring that the network's up time is maintained high as the operator can quickly spot and rectify faults in the network, even remotely.

5.3 SPECTRUM PLANNING

5.3.1 Spectrum Management

The Commission signed a Memorandum of Understanding (MOUs) with the Ministry of Tinkhundla Administration and Development, Ministry of Housing and Urban Development, Eswatini Environmental Authority and Eswatini Civil Aviation Authority on the implementation of the Guidelines for Establishment and Maintenance of Communications Towers. This marked the final step in the operationalization of the guidelines where the stakeholders committed to performing their respective functions in accordance with the guidelines. The Commission further revised the spectrum fee schedule for the next three-year period starting from April 2024.

This revision of the spectrum fee framework is in accordance with legislation that ensures that the schedule is in line with economic factors and the current value of the radio frequency

spectrum. The Commission together with the Ministry of ICT represented the country at the World Radiocommunications Conference (WRC23) held in Dubai between the 20th of November – 15th December 2023. During the meeting the Commission, engaged with other countries globally on different agenda items that were proposing changes to the radio regulations, to further Eswatini and regional interests. An agreement was obtained for the restoration of Eswatini FSS orbital slot as the conference endorsed the proposal. Approval was also obtained for the new BSS orbital slot and the conference endorsed the new proposal. To this end, both the FSS and BSS Orbital slots were restored.

5.3.2 Data Protection and Cybersecurity

Eswatini joined the world in commemorating the International Data Protection Day by hosting an event under the theme “Take Control of Your Data”. The Data Protection Day is internationally celebrated each year on 28 January, which marks the anniversary of the Council of Europe’s ‘Convention 108’ on the protection of personal information - the first legally binding international law on data protection which was open for signature in 1981. Data controllers and data processors and other actors were encouraged to carry out activities to raise awareness about the importance of data protection and to promote best practices with regards to processing personal information.

The Eswatini data Protection Agency (EDPA) developed a registration guide which will assist Data Controllers and Data Processors with the registration process. The development of Data Protection Act Regulations was undertaken in the review period which are currently at final draft stage. Section 48 of the Act requires data controllers to appoint Data Protection Officers (DPOs) to drive compliance within their businesses. Following the publication of the guidelines for the appointment of data protection officers, Data Controllers and Data Processors have started appointing the Data Protection officers and notifying the EDPA.

On the cybersecurity front, the Computer Crime and Cybercrime draft regulations were presented to stakeholders for review. The cybersecurity agency further conducted several capacity building initiatives with stakeholders, which include training of Judiciary and Law enforcement officers on the Computer Crime and Cybercrime Act as well as the offences under the Act.

5.4 National Account Rebasing

The Commission participated in a National Accounts Rebasing Stakeholder Engagement hosted by the Central Statistics Office and the Ministry of Economic Planning and Development in partnership with various stakeholders such as the Central Bank of Eswatini (CBE), Financial Services Regulatory Authority (FSRA), and the United Nations Development Program (UNDP), amongst others. The main objective was to engage key stakeholders including government departments on data issues in the various sectors of the economy and to also share progress on the rebasing exercise.

The time frame for the rebasing exercise was October 2023 to March 2024 and it targets included Annual GDP compiled by the production approach at current and constant prices, annual GDP compiled by the expenditure approach at current and constant prices, time series revised back to 2013 (with no extensions included) and provisional results that will be availed and presented once work is complete. ICT data was supplied to the exercise to aid in the rebasing of the indices for the national accounts.

NOTABLE ELEMENTS IN THE ICT INDUSTRY DURING THE PERIOD

06

6.1 CONTRIBUTION OF THE ICT SECTOR TO THE ECONOMY

The ICT sector contributes significantly to the country's economy. Socio-economic activities and networking hinge on the use of communications services. ICT plays a prominent role in all sectors. Broadband penetration is the backbone for internet connectivity through which the communication sector pervasively impacts the economy. This is evidenced by the wide adoption of technology in sectors such as agriculture, e-commerce, education, financial, health, manufacturing, and many others, thus contributing to GDP growth. Most applications run on communications infrastructure, enabling the country's citizens and businesses to perform transactions and access services on digital devices.

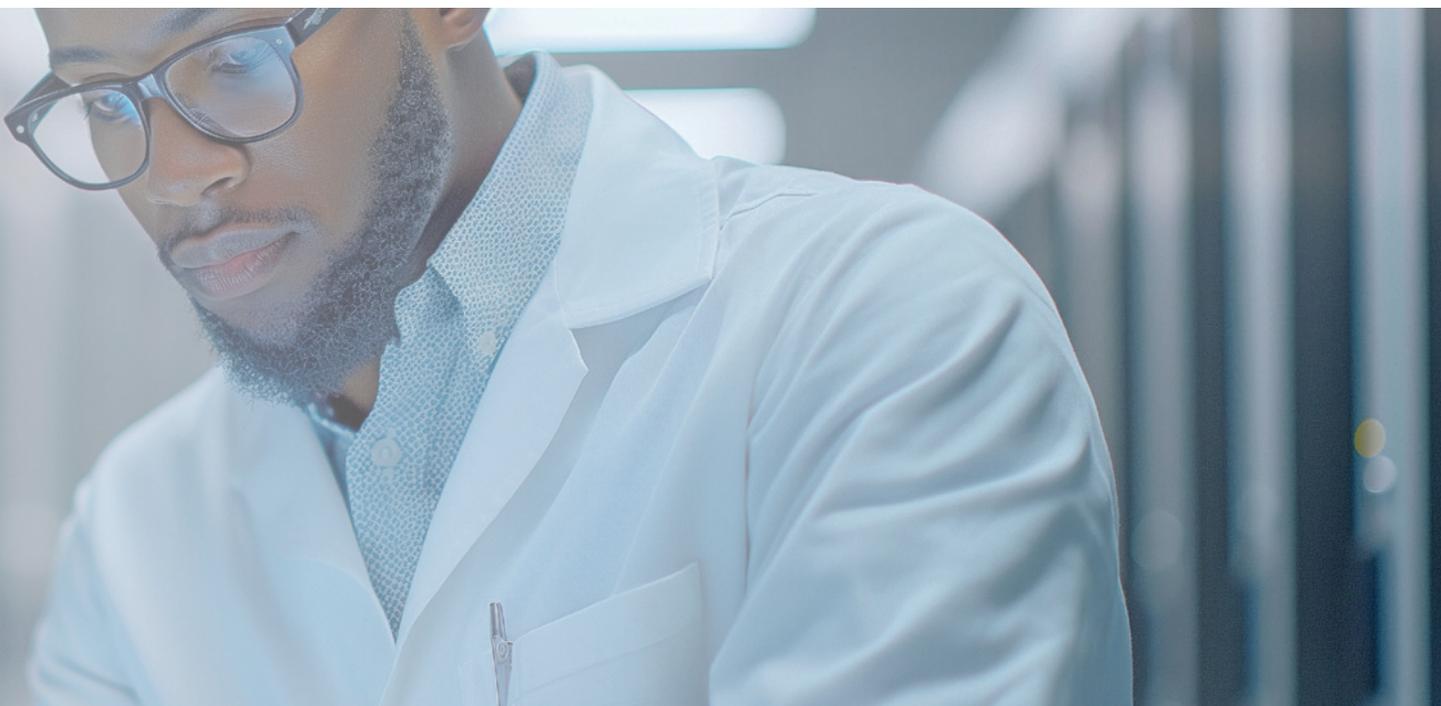
6.2 MACRO-ECONOMIC RECOVERY

According to the International Monetary Fund (IMF) 2024 report, the aftermath of COVID-19 prevails in most economies, which has seen their output continue to deteriorate and falling below historical trends. In the wake of these effects, the global economy is grappling with emerging challenges, heightened geopolitical tensions, and highly volatile commodity prices, which have amplified the situation and further triggered newer economic issues. Elevated global inflation coupled

with a highly synchronized restrictive monetary policy stance globally were the leading economic challenges, which softened global demand. Global economic growth toned down to 3.2 percent in 2023 from a growth of 3.5 percent in 2022. However, amidst these economic turbulences, several economies reflected resilience, attaining better than-expected growth in 2023, owing to stronger than expected private consumption and fiscal support.

In the region of Sub-Saharan Africa, a moderated growth of 3.4 percent was recorded in 2023, compared to 4.0 percent in 2022. Major economies in the region, including the Republic of South Africa (RSA) economy, Eswatini's major trading partner, remain engulfed by domestic structural challenges, which are likely to persist in the short to medium term, weighing on growth prospects. In the Eswatini domestic economy, consumption demand surged, building on the rebounding of export demand for key products, thus contributing to the 4.8 percent estimated growth in 2023. The domestic economy reflected a strong resurgence, backed by notable performance in selected sectors in the review period, the ICT sector being one of those sectors.

According to the MEPD, The ICT subsector continued to reflect sustained growth in the recent period following the strong drive seen since the COVID-19 pandemic in 2020 in line with the new



norm of doing business. Although growth was observed to have bottomed out in 2022, with the ICT subsector significantly declining by 8.7 percent, the subsector rebounded by 17.3 percent in 2023, with new demand observed during the elections period as well as benefiting from increased investment in improving infrastructure network by some players aiming to increase connectivity in previously untapped places.

Overall, the strong performance of the ICT subsector is attributed to the continued infrastructural investment in the form of increased base stations aimed at increasing access to network coverage. Therefore, the introduction of wireless ICT technology, fibre network, and the potential rollout of a 5G network is expected to boost the ICT subsector in 2024 and beyond.

6.3 EXPANSION IN NETWORK INFRASTRUCTURE

Major strides were taken regarding development of network infrastructure for mobile communications to extend market penetration and improve the quality of service for consumers of ICT goods and services. The Universal Access Service Fund contributed significantly to network upgrades in the period. The number of Base Transceiver Sites (BTS) for the 2G network increased by 8.4 percent from 667 to 723 sites, with population coverage

improving to 98.7 percent. The 3G network sites increased by 7.9 percent from 671 to 724 with geographic coverage stretching by 3.4 percent from 94.6 percent to 98 percent. Sites for the 4G network increased from 571 to 724, with geographic coverage improving to 81.9 percent, covering 94.7 percent of the population.

6.4 IMPROVEMENTS TO COST OF COMMUNICATION

Continuous interventions undertaken have continued to improve the cost of communication in the country. After the completion of the Pricing Benchmark Study in 2021, a decision was issued where wholesale rates were to be reduced through another 3-year glide path that ran from 2023-2025. The 3-year wholesale rates reduction glide path ended in the review period. Eswatini Mobile and Eswatini Posts and Telecommunications Corporation (EPTC) reduced their out of bundle voice tariffs. Eswatini Mobile reduced out of bundle voice tariffs for both peak and off-peak calls by 50 percent while EPTC reduced on-net peak and off-peak tariffs by 60 percent and 50 percent respectively.

On the other hand, EPTC reduced off-net peak and off-peak tariffs by 75 percent. A pricing philosophy where data offered to customers was increased while the price remained constant was

implemented by operators. For instance, MTN increased the data offering from 1GB to 1.2GB while the price remained at E99, and this approach enabled consumers to access more data at the same price enabling longer connectivity. ESM offers 1.5GB of data for E100.

The country further made strides in getting closer to attaining Target 2 of the UN Broadband Commission's goals which stipulate that entry-level broadband services should cost less than 2percent of monthly gross national income per capita. The Kingdom met the set target on three (3) Baskets, which are the Fixed Broadband (5GB) Basket (currently at 2percent), Mobile Data and Voice Low Consumption Basket (currently at 1percent) and the Mobile Cellular Low Usage Basket (currently at 1percent). Eswatini is ranked 2nd in the SADC region on Fixed Broadband basket.

6.5 INNOVATIVE PRODUCTS TO DRIVE TRAFFIC

Operators continued rolling out products and services with improved features such as higher download and upload speeds for data. An increase was observed in Off-Net traffic, attributed to the introduction of Off-Net bundles by operators thus allowing customers to call other networks at lower costs, as well as enterprises and businesses.

Existing service offerings were streamlined in response to fluctuations in consumer needs, through the modification of data bundle volumes and cost, where data volumes were increased while the price remained the same.

6.6 CHALLENGES

6.6.1 Infrastructure Vandalism and Copper Theft

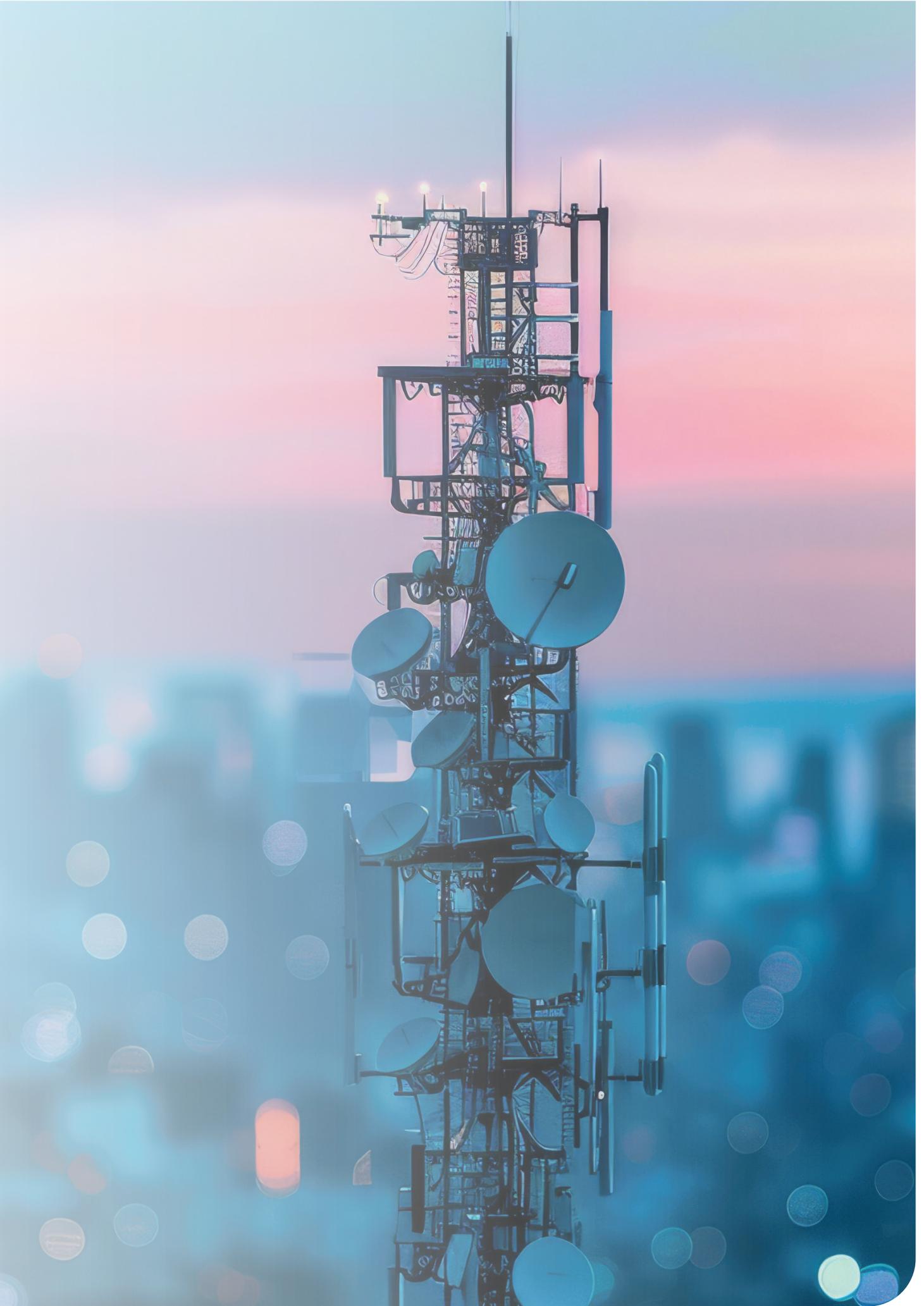
The theft of copper used by the fixed line operator for infrastructure roll-out continued to interrupt service provision and development. In addition to copper theft, vandalism of network infrastructure also persisted. Even when the fixed line operator

changed from copper to fibre technology, suspected criminal elements continued to vandalise infrastructure. These activities pose an obstacle and limitation to the development of the ICT sector and the economy at large. To mitigate these disruptions, the fixed line operator is gradually phasing out the use of copper wire and rolling out fibre optics. New entrants in the ISP market are invariably deploying numerous technologies to deliver services to customers.

6.6.2 Low levels of ICT literacy skills

Low level of ICT literacy skills remains one of the main barriers to achieving universal digital transformation. The ICT Access and Use Survey 2022 revealed that 31 percent of individuals in the Kingdom of Eswatini reported not to use the internet, citing that they do not need the internet, while 24 percent mentioned lack of skills as their reason for not using the internet. Digital skills are crucially important in leveraging ICTs to boost development.

The regulator continues with initiatives to teach digital literacy skills to the various age groups through targeted programmes. These include financial inclusion programmes where the Commission educates the elderly on the use of smartphones, to ensure all citizens have access to services offered on digital platforms, among other projects.



OUTLOOK FOR THE SECTOR

07

7.1 INVESTMENT IN NETWORK INFRASTRUCTURE

The demand for data is expected to remain on an upward trajectory, guided by the escalating uptake of ICT services. Service providers are expected to continue with infrastructure deployment programmes to expand coverage and improve quality of service. Network expansion is therefore projected to continue, which includes deployment of 4G/LTE sites, and satellite services coupled with the roll-out of fibre networks.

The incumbent fixed line operator has already rolled out fibre networks in most areas that were affected by copper theft as a replacement, which include areas mostly in urban and semi-urban areas along the Mbabane – Manzini corridor. Additionally, the entrance of Starlink into the market (which offers higher internet speeds up to and beyond 100 Mbps) ignited competition in the Internet Service Provision (ISP) market as most of the operators raised their minimum speeds offering from 1Mbps to 5Mbps.

These developments are anticipated to increase the broadband capacity in the Kingdom and

stimulate the uptake of broadband services thus advancing technological development in Eswatini. Sustained efforts by the UAS Fund with stakeholders in building BTS sites will extend network coverage, improve network optimisation and stability, and avail additional routes for network redundancy.

7.2 PILOT TESTS OF THE 5G NETWORK

Eswatini has been assessing the pilot testing for 5G deployment with two (2) sites already installed in two cities, being the capital city Mbabane and Ezulwini. One of the key challenges across Africa in terms of 5G network rollout relates to the business viability of rolling out the network, where there is no business case for 5G rollout due to lack of industrial applications where 5G could be used. Rolling out 5G will involve expenses such as cost of mobile base stations, backhaul technology that connects mobile sites to the core network, and energy supply. Operators in the local market continue to innovate as government monitors developments in network deployments, network performance and the end-user experience.



7.3 CYBER SECURITY AND DATA PROTECTION AWARENESS

After the passing of the Data Protection Act, 2022 and the Computer Crime and Cybercrime Act 2022, the Eswatini Data Protection Authority (EDPA) and the Computer Incident Response Team (Sz-CIRT) were established. The Commission has continued to embark on awareness campaigns to educate the public on both Act and capacitate citizens on their rights to Data Protection and Cybersecurity. The Data Protection Act provides for the collection, processing, disclosure, and protection of personal information and further designates the Eswatini Communications Commission as the Eswatini Data Protection Authority (EDPA) charged with the mandate to administer and foster compliance with the Act.

The Computer Crime and Cybercrime and Cybercrime Act provides for the establishment of the Computer Incident Response Team (Sz-CIRT) for Eswatini, which acts as a focal point in coordinating cybersecurity incidents for the Government Departments, Internet Service Providers, and other relevant entities within the country. The Sz-CIRT further monitors incidents,

provides early warnings, disseminates information, and enforces cybersecurity standards and minimum specifications for Eswatini.

7.4 ECONOMIC VALUE ADDED

The ICT sector's contribution to the country's economy is expected to continue through job creation, social investments, fiscus contribution, and digital and financial inclusion products. This contribution has a direct impact on Eswatini's information and communications sector and an employment multiplier effect is experienced within the ICT sector and other sectors like wholesale and retail.

The service providers' activities to boost inclusive economic growth through capital infrastructure investments, operating expenses, and tax also results in the creation of direct, indirect, and induced jobs across the ICT value chain. Inclusive connectivity is anticipated, in driving digital and financial inclusion, increasing access and reducing the costs of communication, ultimately connecting people not only to each other but also to business and educational opportunities.

CONCLUSION

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The performance of the sector improved considerably in the review period and rebounded from declines that were observed in the previous year. The demand for ICT services continued to increase as most of the telecommunication indicators recorded positive developments. Mobile subscriptions increased by 4.2 percent, principally due to the expansion in mobile cellular network coverage, while mobile broadband subscriptions also improved by 6.01 percent to 1 473 487.

These advancements led to an improved Mobile Cellular Penetration of 4.0 percent to 133 percent, with mobile broadband penetration progressing by 6.0 percent to 124 percent. The growth in mobile broadband subscriptions is credited to the ever-rising demand for data and mobile broadband connectivity, boosted by positive pricing offers for mobile data and smartphone devices.

Major strides were taken regarding development of network infrastructure for mobile communications to extend market penetration and improve the quality of service for consumers of ICT goods and services. The number of 2G sites increased by 8.4 percent to 723, with population coverage extending by 0.7 percent to 98.7 percent. 3G sites grew by 7.9 percent to 724, with a similar population coverage as the 2G network. 4G coverage continued to grow with sites increasing by 26.8 percent to 724, resulting in a significant 14.5 percent movement in geographic coverage to 81.9 percent from 67.4 percent. 4G population coverage further moved from 87.2 percent to 94.7 percent. Remarkably, fixed market indicators also improved, which is a positive step towards recovery in a market that was on a free-fall. Fixed broadband subscriptions grew by 12.3 percent to 33 828 as the demand for data grew, mainly attributable to the increase in



fixed-wired connections due to the roll out of the fibre technology by the fixed line operator. Fixed telephone subscriptions also increased, by 1.2 percent to 40 091.

From these developments, the sector looks poised to grow in the foreseeable future, based on the backdrop of increased demand for ICT services. Investment in infrastructure deployment to extend network coverage by service providers and competitive pricing outcomes will accelerate the pace of digital transformation. With the full operationalisation of the Computer Crime and Cybercrime Act as well as the Data Protection Act, the country is well positioned to safeguard the safety of consumers online as well as protect personal data from abuse by data controllers and processors.

10. APPENDIX

TELECOMMUNICATIONS SECTOR 2023/24		% YOY CHANGE
Mobile Cellular Subscriptions	1 576 465	4.2%
Mobile Cellular Penetration	133%	4%
Mobile Broadband Subscriptions	1 473 487	6%
Mobile Broadband Penetration	124%	6%
Mobile Smartphone Connectivity	963 990	8.2%
Mobile Smartphone Penetration	80.2%	5.2%
Fixed Telephone Subscriptions	40 091	1.2%
Fixed-Wireless Telephone Subscriptions	16 379	5.3%
Fixed-Wired Telephone Subscriptions	23 712	-1.4%
Fixed Broadband Subscriptions	33 828	12.3%
Fixed-Wired Broadband Subscriptions	9 911	23%
Fixed-Wireless Broadband Subscriptions	23 917	8.4%
Fixed Broadband Market Shares	100%	0.0%
Eswatini.net	27%	3%
Eswatini Mobile	24.8%	3.8%
MTN	23.6%	-7.4%
Real Image	10.9%	-1.1%
Jenny Internet	8.9%	0.9%
Touch IT	3.4%	-0.6%
Starlink	1.1%	1.1%
Other(s)	0.3%	-0.2%
Telecommunications Revenue	E2 567 611 980	9.2%
Voice Services Revenue	E843 289 720	2.3%
Data Services Revenue	E1 085 890 977	12.5%
Short Message Service (SMS) Revenue	E9 513 756	2.5%
Employment in the Telecommunications Industry	954	-24.9%
MNOs Employment	286	-49.9%
Fixed Network Operators Employment	668	-4.4%
Number of Spectrum Licences Issued	53	20.5%
Number of Type Approved Equipment	245	13.4%

POSTAL SERVICES SECTOR 2023/24		% YOY CHANGE
Postal Service Revenue	E30 356 122	25.8%
Domestic Mail	653 745	-23.7%
Domestic Mail Volume (Unregistered Letters)	628 789	-24.3%
Domestic Mail Volume (Registered Letters)	24 956	-1.6%
International Mail	557 668	-9.8%
International Mail Volume – Outbound mail (Letters)	62 823	96%
International Mail Volume – Inbound mail (Letters)	494 845	-15.7%
Packets and Parcels	14 363	-1.8%
International Mail Volume – Outbound (Parcels & Packets)	300	-53%
International Mail Volume – Inbound (Parcels & Packets)	14 067	0.5%
Other Postal Indicators		
Express Mail Services (EMS)	253	5.4%
Post Boxes Rentals	12 011	-12.5%
Post Offices - Total Number of Post Offices	35	0.0%
Post Offices - Total Number of Agencies	16	0.0%
Postal Employment	145	-6.5%
BROADCASTING SECTOR 2023/24		
Broadcasting Economic Indicators		
Broadcasting Revenue	E21 867 474	50.2%
Employment in the Broadcasting Industry	371	1.1%
Number of Radio Employees	162	0.0%
Number of Television Employees	209	1.9%
Other Broadcasting Indicators		
Number of Productions	10 573	0.01%
Number of Radio Stations	3	0.0%
Number of Set Top Boxes	35 000	0.0%
Number of Television Stations	2	0.0%
Number of Signal Distributors	1	0.0%
Number of Content Distributors	2	0.0%
Number of Pay TV Service Providers	1	0.0%

DEFINITIONS AND INTERPRETATIONS

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Asymmetric Digital Subscriber Line (ADSL)

Internet Subscriptions refers to the number of internet subscriptions using asymmetric digital subscriber line (ADSL) services to access the internet, at downstream speeds greater than or equal to 256 kbit/s (ITU definition). ADSL is a technology for bringing high-bandwidth information to homes and small businesses over ordinary copper telephone lines.

Broadband is defined as a high-speed internet access service providing download speeds of at least 256 kbit/s (ITU definition). In the Eswatini ICT market, the minimum approved download speed for broadband is 5Mbps.

Company Income Tax (CIT) represents the proportion of CIT payments for the Electronic Communications Sector to total CIT payments received by the Eswatini Revenue Service (ERS).

Financial Year (FY) refers to a fiscal year (or financial year, or sometimes budget year) used in government accounting, which varies between countries, and for budget purposes. It is also used for financial reporting by businesses and other organizations. For purposes of this report, the financial year runs from 01 April 2023 to 31 March 2024.

Fixed Broadband Subscriptions refers to fixed

(wired and wireless) subscriptions to internet speeds access at downstream speeds greater than or equal 256 kbit/s, excludes mobile-broadband subscriptions where users can access a service throughout the country wherever coverage is available. It includes both residential and organisations' subscriptions.

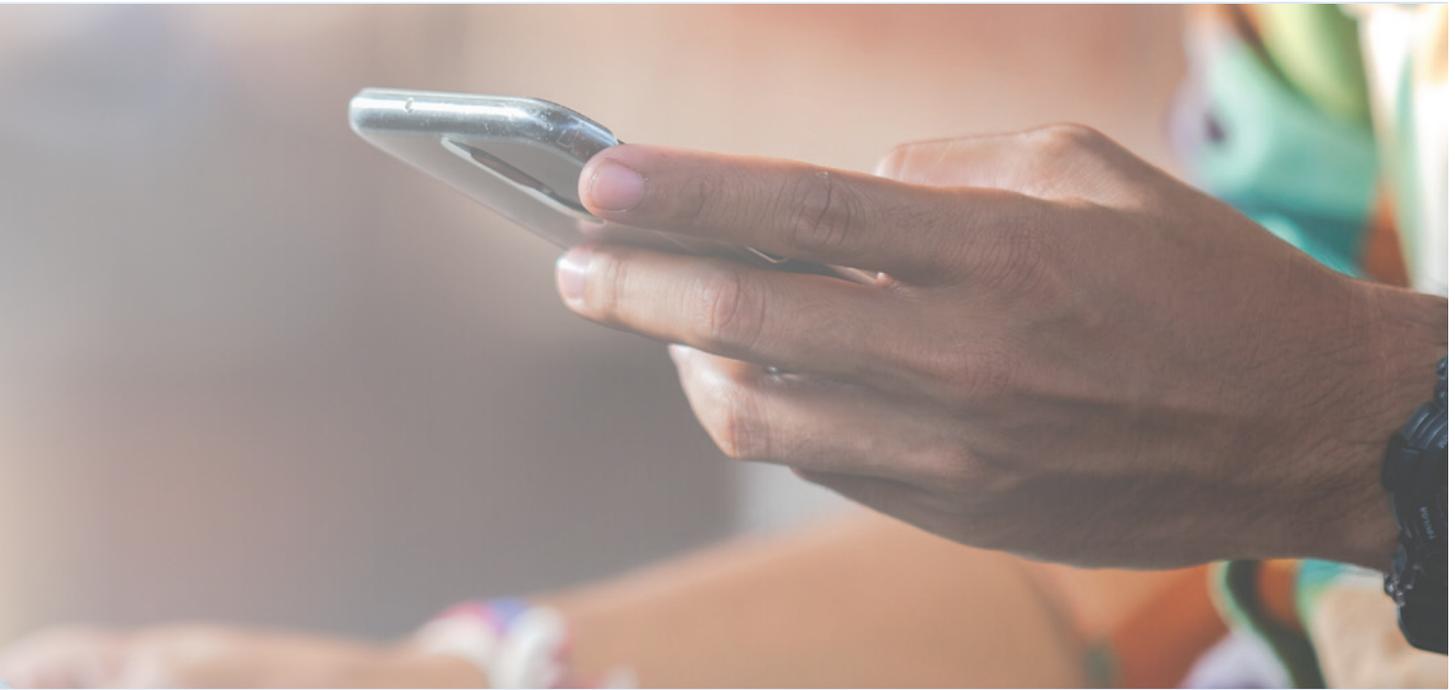
Fixed Broadband Subscriptions per 100 Inhabitants refers to Fixed Internet Broadband Subscriptions divided by the population and multiplied by 100.

Fixed Telephone Subscriptions refers to the number of active number of analogue fixed-telephone lines and fixed wireless local loop (WLL), ISDN voice-channel equivalents and fixed public payphones subscriptions.

Fixed Telephone Subscriptions per 100 Inhabitants refers to the sum of Fixed Telephone Subscriptions, divided by the population and multiplied by 100.

Fibre-To-The-Home(FTTH)/Building Internet Subscriptions refers to the number of internet subscriptions using Fibre-To-The-Home (FTTH) or Fibre-To-The-Building (FTTB), at downstream speeds equal to, or greater than, 256 kbit/s.

International Internet bandwidth refers to the total used capacity of international internet



bandwidth, in megabits per second (Mbit/s). It is measured as the sum of used capacity by Mobile Networks (MTN and Eswatini Mobile) and ISPs as leased from and offered by EPTC, as the only entity offering international bandwidth. In this report, capacity is asymmetric (i.e., more incoming (downlink) than outgoing (uplink) capacity).

Mobile Broadband Subscriptions refers to the sum of standard mobile-broadband and dedicated mobile broadband subscriptions to the public Internet, namely 3G and 4G connections.

Mobile Broadband Subscriptions per 100 Inhabitants implies the total number of mobile broadband subscriptions divided by the population and multiplied by 100.

Mobile Cellular Telephone Subscriptions refers to the number of subscriptions to a public mobile-telephone service that provides access to the PSTN using cellular technology.

Mobile Cellular Subscriptions per 100 Inhabitants implies the total number of mobile cellular subscriptions divided by the population and multiplied by 100.

Other Income Tax (OIT) represents the proportion of OIT payments for the Electronic Communications Sector to total OIT payments received by the Eswatini Revenue Service (ERS).

PAYE (Pay as You Earn) represents the proportion of PAYE payments for the Electronic Communications Sector to total PAYE payments received by the Eswatini Revenue Service (ERS).

Public Switched Telephone Network (PSTN) is a combination of telephone networks that provides infrastructure and services for public telecommunication. The PSTN is the aggregate of the world's circuit-switched telephone networks that are operated by national, regional, or local telephony operators. These consist of telephone lines, fiber optic cables, microwave transmission links, cellular networks, communications satellites and undersea telephone cables, all interconnected by switching centers which allow most telephones to communicate with each other. Originally a network of fixed-line analog telephone systems, the PSTN is now almost entirely digital in its core network and includes mobile and other networks, as well as fixed telephones.

Quarter (Q1, Q2, Q3, Q4) refers to the three-month interval period on the Financial Year beginning from April (in the previous year) to March (in the subsequent year).

Quarter-on-Quarter (QOQ) compares a change in performance between one fiscal quarter and the previous fiscal quarter.

SMS refers to a text messaging service component of most telephone, internet, and mobile device systems. It uses standardized communication protocols that allow mobile devices to exchange short text messages.

Telecommunications Employment refers to the total number of persons/staff, in full-time equivalent (FTE) units, employed by telecommunication operators in the country for the provision of telecommunication services, including fixed-telephone, mobile-cellular, internet and data services. This excludes staff working in broadcasting businesses that offer only traditional broadcasting services. Part-time staff is expressed in terms of FTE full-time staff equivalent (FTE).

Telecommunications Services Revenue refers to revenue earned from retail fixed-telephone, mobile-cellular, internet and data services offered by telecommunication operators (both network and virtual) offering services within the country.

VAT (Value Added Tax) represents the proportion of Value Added Tax payments for the Electronic Communications Sector to total VAT payments received by the Eswatini Revenue Service (ERS).

Wireless-Broadband Subscriptions refers to the sum of satellite broadband and terrestrial fixed wireless broadband subscriptions to the public internet.

Year-on-Year (YOY) compares a change in performance in one period with those of a comparable period on an annualized basis.



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