FOURTH QUARTER SECTOR STATISTICS REPORT FOR THE FINANCIAL YEAR 2024/2025 (1ST APRIL – 30TH JUNE 2025)

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LIST OF ACRONYMS

2G	Second Generation
3G	Third Generation
4G	Fourth Generation
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ASPs	Application Service Providers
CA	Communications Authority of Kenya
Dare 1	Djibouti Africa Regional Express 1
DDOS	Distributed Denial of Service
DoS	Denial-of-Service
DSL	Digital Subscriber Line
DTH	Direct-To-Home
DTT	Digital Terrestrial Television
EAC	East African Community
EASSy	Eastern Africa Submarine Cable Systems
FM	Frequency Modulation
FTTH	Fibre-To-The-Home
FTTO	Fibre-To-The-Office
FY	Financial Year
GB	Gigabyte
Gbps	Gigabits per second
ICTs	Information and Communication Technologies
JTL	Jamii Telecommunications Limited
Kbps	Kilobits per second
KE-CIRT/CC	National Kenya Computer Incident Response Team/Coordination Centre
LION 2	Lower Indian Ocean Network 2
LTE	Long Term Evolution
MB	Megabytes
Mbps	Megabits per second
MNOs	Mobile Network Operators
MoU	Minutes of Use
MVNO	Mobile Virtual Network Operator
NCC	National Cybersecurity Centre
OTT	Over-The-Top media services
PCK	Postal Corporation of Kenya
PEACE	Pakistan and East Africa Connecting Europe
PLC	Public Limited Company
SEACOM	Sea Sub-Marine Communications Limited

SIM	Subscriber Identification Module
SMS	Short Messaging Service
TEAMS	The East African Marine System
TKL	Telkom Kenya Limited
UMTS	Universal Mobile Telecommunication System
VoIP	Voice over Internet Protocol

PRELIMINARY NOTES

This report is based on data provided by licensees in the ICT sector as per their license conditions and obligations. The information provided herein is subject to review during the subsequent quarter in case of any revisions or updates from the licensees.

This report has been prepared in line with best practice and adheres to International Telecommunications Union standards on collection of administrative/supply side data on telecommunications/Information and Communications Technologies https://www.itu.int/en/ITU-D/Statistics/Documents/publications/handbook/2020/ITUHandbookTelecomAdminData2020_E_rev1.pdf. CA has domesticated the same and the manual containing definitions, methodologies and scope of the various indicators is available on https://www.ca.go.ke/sites/default/files/2023-06/ICT%20Indicators%20Manual%202019.pdf

The main objective of the report is to measure and monitor availability and accessibility of ICT services by Kenyans from the perspective of supply. It is key to note that this report **does not include demand side data** (data on usage/uptake of ICTs) as this information is collected through National ICT Surveys and reported separately as per ITU standards https://www.itu.int/en/ITUD/Statistics/Documents/publications/manual/ITUManualHouseholds2020_E.pdf. The Authority collaborates with the Kenyan National Bureau of Statistics (KNBS) to collect the demand side data through National Surveys.

SUMMARY OF ICT INDICATORS

The Fourth Quarter Sector Statistics Report for the 2024/25 Financial Year highlights the performance and trends in supply and uptake of ICT services for the period 1st April to 30th June 2025 in the following categories:

1. Mobile Network Services
2. Fixed Network Services
3. Courier Services
4. Broadcasting Services
5. Frequency Spectrum Management
6. Electronic Transactions and Cyberspace Management

Indicator/Period	*Q4 (Apr-Jun 25)*	*Q3 (Jan-Mar 25) ††*	*Quarterly Variation (%)*
MOBILE NETWORK SERVICES			
Subscriptions to Mobile Services			
Total Mobile (SIM) Subscriptions	76,690,718	75,907,780	1.0
Machine-to-Machine (M2M) Subscriptions	1,789,785	1,987,277	-9.9
Mobile Money Transfer Services			
Number of Registered Mobile Money Agents	453,480	415,163	9.2
Mobile Money Subscriptions	47,720,195	45,364,977	5.2
Mobile Data and Broadband Subscriptions			
Mobile Data Subscriptions	58,575,082	56,862,742	3.0
Mobile Broadband Subscriptions	45,790,990	39,564,887	15.7
Mobile Phones Devices			
Feature Phones	29,478,816	32,573,748	-9.5
Smartphones	43,751,716	42,349,405	3.3
Domestic Mobile Traffic			
Mobile Voice Traffic (Minutes)			
On-Net Voice Traffic	24,531,457,961	24,363,240,349	0.7
Off-Net Voice Traffic	4,634,277,880	4,514,954,739	2.6
Mobile to Fixed Network	6,069,984	800,513	658.3
Mobile SMS Traffic			
SMS On-Net	13,537,684,359	12,657,205,133	7.0
SMS Off-Net	1,709,805,669	1,656,854,442	3.2
International Mobile Traffic			
Mobile Voice Traffic (Minutes)			
International Incoming Mobile Voice Traffic	167,199,882	163,293,356	2.4
International Outgoing Mobile Voice Traffic	200,269,701	179,786,791	11.4
Mobile SMS Traffic			
International Incoming SMS	5,631,540	6,444,348	-12.6
International Outgoing SMS	2,704,693	2,705,509	0.0
Roaming Traffic			
Out-bound Roaming Traffic			
Out-bound Roaming Incoming Voice Traffic (Minutes)	173,773,912	153,357,647	13.3
Out-bound Roaming Outgoing Voice Traffic (Minutes)	9,569,787	8,503,283	12.5
Out-bound Roaming Incoming SMS	94,780,440	79,918,595	18.6
Out-bound Roaming Outgoing SMS	4,509,445	4,881,537	-7.6
Data Volumes (MB)	124,558,442	106,884,861	16.5
In-bound Roaming Traffic			
In-bound Roaming Incoming Voice Traffic (Minutes)	177,007,587	174,284,111	1.6
In-bound Roaming Outgoing Voice Traffic (Minutes)	4,204,367	4,815,402	-12.7
In-bound Roaming Incoming SMS	57,144,021	55,141,238	3.6
In-bound Roaming Outgoing SMS	1,696,894	2,067,770	-17.9
Data Volumes (MB)	553,927,711	565,622,159	-2.1
FIXED NETWORK SERVICES			
Fixed Voice Subscriptions			
Fixed Line Subscriptions	6,095	6,567	-7.2
Fixed Wireless Subscriptions	1,651	1,607	2.7
Fixed VoIP Subscriptions	47,555	47,217	0.7
Domestic Fixed Voice Traffic			
Fixed line-Fixed line	89,868	109,774	-18.1
Fixed Wireless-Fixed Wireless	315,263	312,473	0.9
Fixed to Mobile	705,984	759,776	-7.1

Indicator/Period	*Q4 (Apr-Jun 25)*	*Q3 (Jan-Mar 25) ††*	*Quarterly Variation (%)*
International Fixed Voice Traffic			
Incoming Fixed Voice Traffic	5,042,602	4,778,284	5.5
Outgoing Fixed Voice Traffic	874,473	1,156,680	-24.4
Outgoing Fixed VOIP	515,682	567,500	-9.1
Fixed Data and Broadband Services			
Fixed Data/internet subscriptions	2,144,713	1,987,891	7.9
Total Available International Bandwidth (Gbps)	19,381.000	22,154.000	-12.5
Total Used International Bandwidth (Gbps)	13,689.265	12,544.158	9.1
POSTAL AND COURIER SERVICES			
Postal Traffic			
Domestic Letters	174,057	145,627	19.5
International Outgoing Letters	17,106	14,727	16.2
International Incoming Letters	24,571	23,435	4.8
Domestic Parcels	141,932	161,331	-12.0
International Outgoing Parcels	13,020	111,850	-88.4
International Incoming Parcels	107,035	108,416	-1.3
Courier Traffic			
Domestic Letters	769,458	764,948	0.6
International Outgoing Letters	8,738	23,506	-62.8
International Incoming Letters	32,040	39,540	-19.0
Domestic Parcels	3,012,791	2,762,007	9.1
International Outgoing Parcels	24,809	24,638	0.7
International Incoming Parcels	30,583	194,148	-84.2
BROADCASTING SERVICES			
DTT Subscriptions	806,850	858,865	-6.1
DTH Subscriptions	602,706	644,381	-6.5
Cable Subscriptions	66,865	81,513	-18.0
FREQUENCY SPECTRUM MANAGEMENT			
Microwave links Deployed	10,311	11,458	-10.0
FM Sound Broadcasting Frequencies Assigned	1,010	1,035	-2.4
ELECTRONIC TRANSACTIONS AND CYBERSPACE MANAGEMENT			
.KE Domain	111,313	109,251	1.9
Total Cyber Threats Detected	4,586,682,277	2,537,428,868	80.8
Total Cyber Threat Advisories	17,269,049	13,227,510	30.6
POPULATION			
Total Population in Kenya (Millions)†	52,428,290	52,428,290	0.0

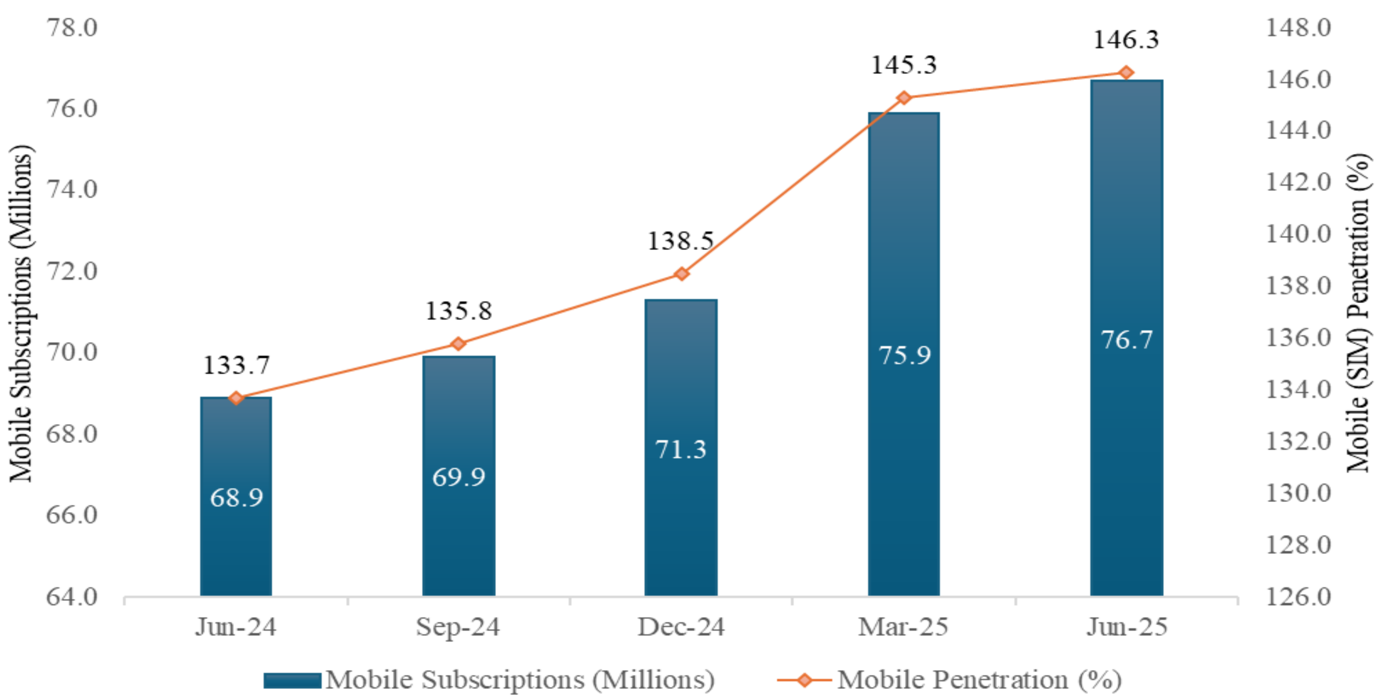
† Economic Survey 2025

1. MOBILE NETWORK SERVICES

1.1 Mobile (SIM) Subscriptions

The telecommunications sub-sector in the country experienced significant growth during the 2024/25 Financial Year attributed to expansion of telecom infrastructure and increased adoption of smartphones. Mobile (SIM) subscriptions and the respective penetration rates maintained an upward trend during the reference period with 76.7 million subscriptions translating to penetration rate of 146.3 as of June 30th June 2025 as shown in figure 1. This growth is mainly attributed to the ever-growing demand for mobile services such as mobile broadband, mobile money and mobile banking services.

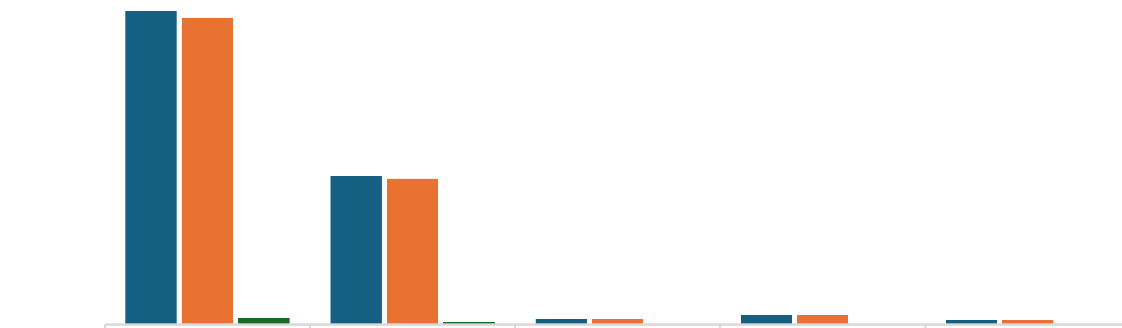
Figure 1 illustrates the trends in mobile (SIM) subscriptions and the respective penetration rates.



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

Figure 1: Mobile Subscriptions and Penetration

During the reference period, the ratio of pre-paid to postpaid subscriptions was 98.1: 1.9. The number of active mobile (SIM) subscriptions per operator by contract type is as shown in Figure 2.



	Safaricom	Airtel	Telkom	Finserve	Jamii
Total	49,933,605	23,659,770	868,788	1,500,327	728,228
Prepaid	48,888,662	23,254,921	858,650	1,500,327	728,228
Postpaid	1,044,943	404,849	10,138	0	0

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

Figure 2: Mobile Subscription per Operator

1.2 Machine-to-Machine (M2M) Subscriptions

Machine-to-Machine (M2M) subscriptions that comprise of SIM cards assigned for use in machines such as vehicle telemetry, smart meters, smart home appliances among others for the exchange of data between devices declined by 9.9 per cent to 1.7 million by end of June 2025 from 1.9 million reported last quarter. However, there was 2.7 per cent growth when compared to June 2024 as shown in Table 1.

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

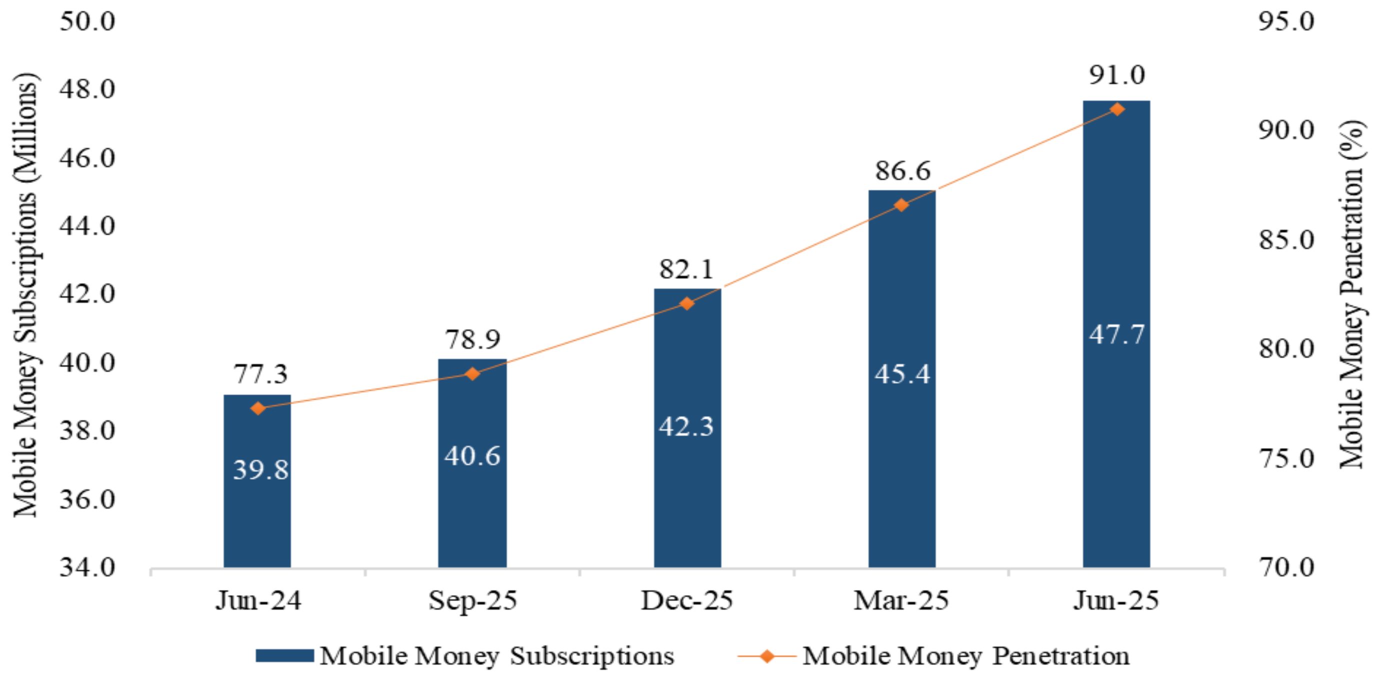
Indicator/Period	*Jun-25*	*Mar-25**	*Quarterly Variation (%)*	*Jun-25*	*Jun-24*	*Annual Variation (%)*
Machine to Machine (M2M)	1,789,785	1,987,277	-9.9	1,789,785	1,743,134	2.7

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

1.3 Mobile Money Services

By end of June 2025, mobile money subscriptions were at 47.7 million translating to a penetration rate of 91.0 per cent compared to 77.3 per cent penetration rate reported in June 2024. This increase was mainly driven by the growing demand to close the gaps on financial inclusion, especially among the unbanked.

Figure 3 illustrates the trends of Mobile Money subscriptions and penetration.



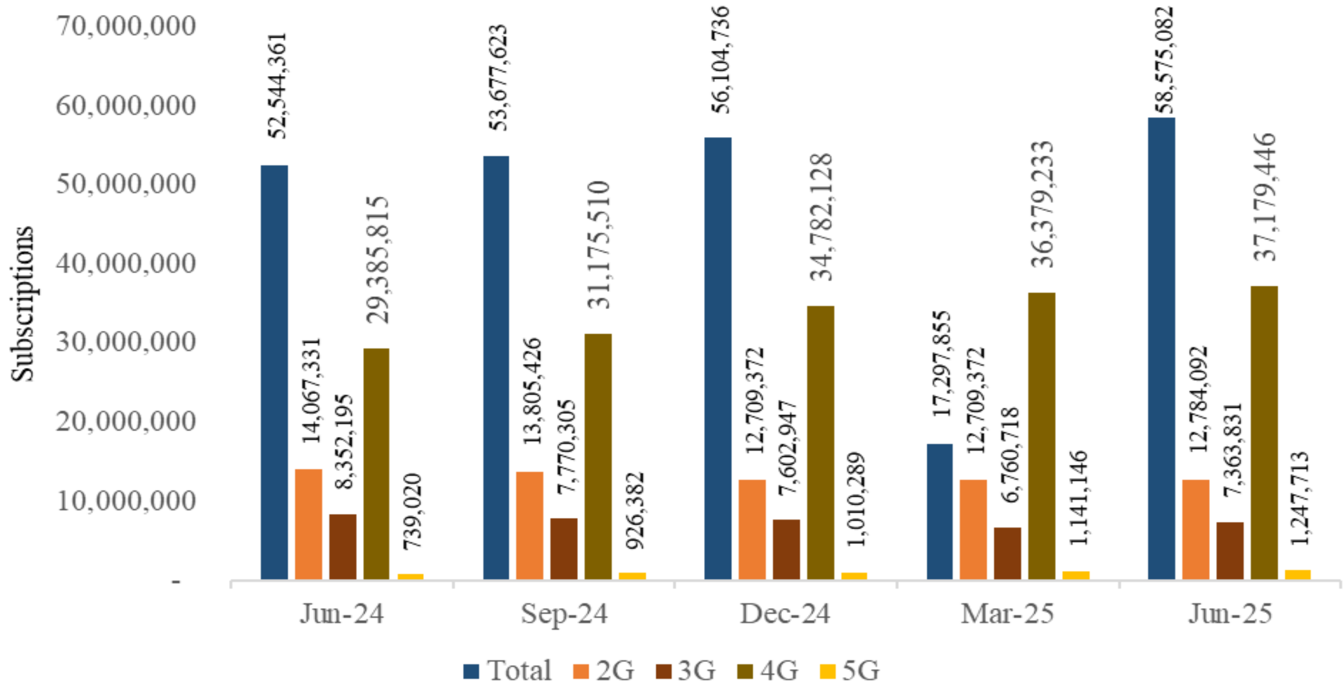
Source: CA, Operators' Returns,

Figure 3:Mobile Money Services

The Internet has become a powerful tool for bridging geographic and socio-economic divides, promoting e-commerce, enabling e-government services, and empowering youth and marginalized communities.

Mobile data continued to drive the data/internet market in Kenya with total subscriptions at 58.5 million as of 30th June 2025, of which 78.2 per cent were on mobile broadband. This marked a growth of 27.3 per cent when compared to 52.5 million total subscriptions reported at the end of June 2024. Subscriptions to 4G services constituted the highest broadband subscriptions at 81.2 per cent of the total. The uptake of mobile data/internet services for the past five (5) quarters is as shown in Figure 4.

1.4 Mobile Data and Broadband[1] Services

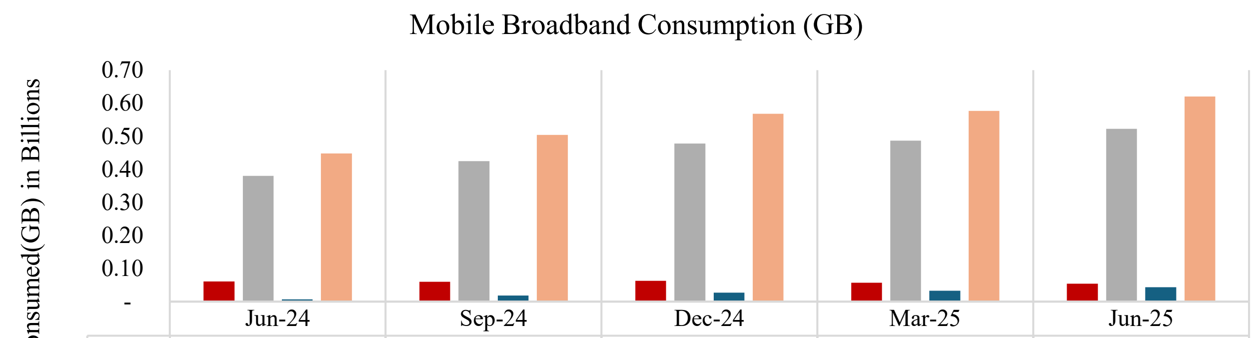


Source: CA, Operators' Returns, Provisional Data for Telkom Kenya Limited

Figure 4: Mobile Data Subscriptions

Data consumption by 4G and 5G users grew significantly between June 2024 and June 2025 whereas 3G declined following a shift in consumer preference for higher and faster internet speeds as shown in Figure 5.

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

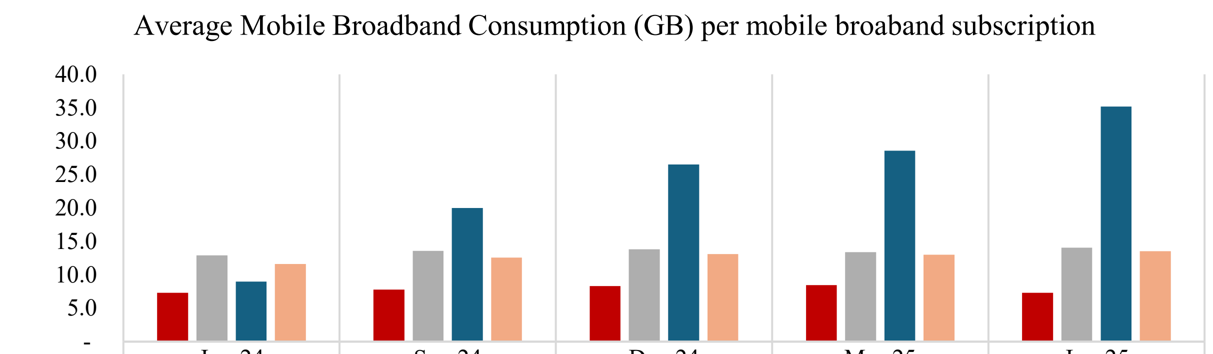


	Jun-24	Sep-24	Dec-24	Mar-25	Jun-25
3G	61,341,279.03	60,295,261.63	63,132,785.00	57,332,405.73	53,758,937.00
4G	380,153,958.23	425,174,376.67	478,376,344.00	486,514,701.74	522,564,678.00
5G	6,657,563.00	18,537,015.00	26,806,729.00	32,611,704.00	43,865,608.00
Total	448,152,800.26	504,006,653.30	568,315,858.00	576,458,811.47	620,189,223.00

Source: CA, Operators', Q3 revised data for Telkom Kenya Limited

Figure 5: Mobile Broadband Consumption

The average mobile broadband consumption in Gigabytes per broadband subscription is shown in Figure 6.



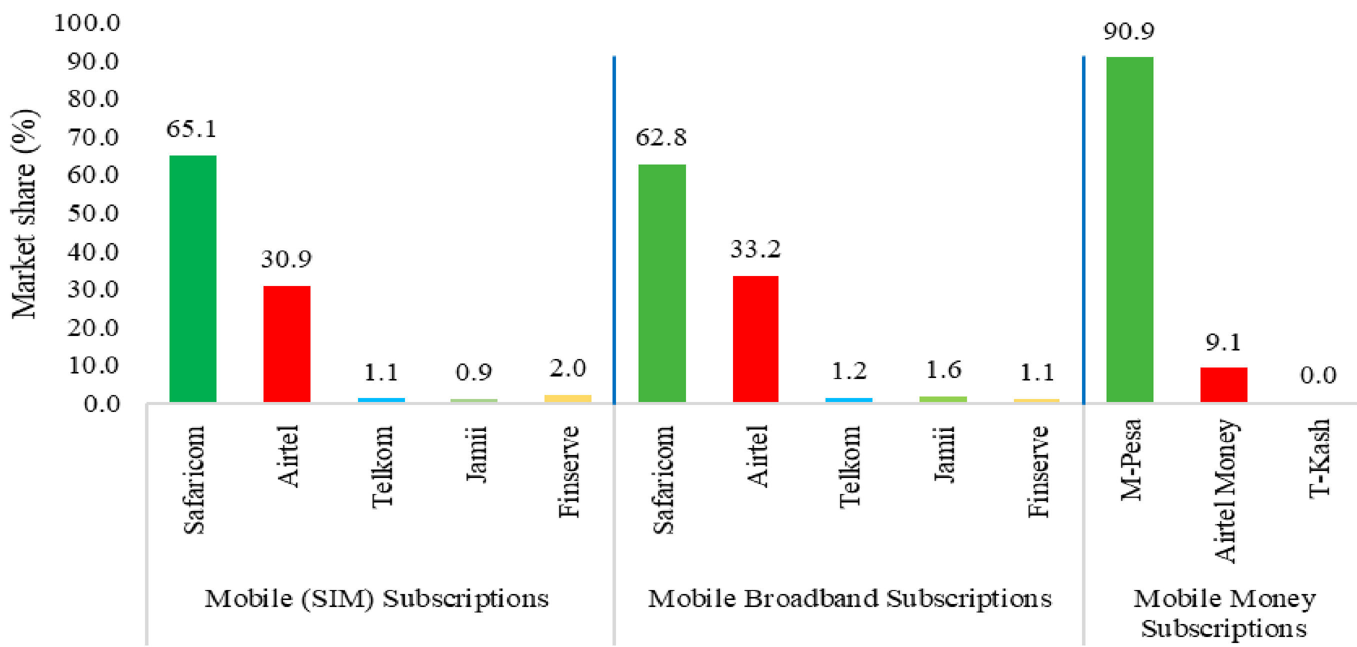
	Jun-24	Sep-24	Dec-24	Mar-25	Jun-25
3G	7.30	7.80	8.3	8.5	7.3
4G	12.90	13.60	13.8	13.4	14.1
5G	9.00	20.00	26.5	28.6	35.2
Total	11.60	12.60	13.1	13.0	13.5

Source: CA, Operators' Returns, Q3 revised data for Telkom Kenya Limited

Figure 6: Mobile Consumption per subscription

1.5 Market Shares in Subscriptions for Mobile Services

The market share in subscriptions for the respective mobile services is as shown in Figure 7.

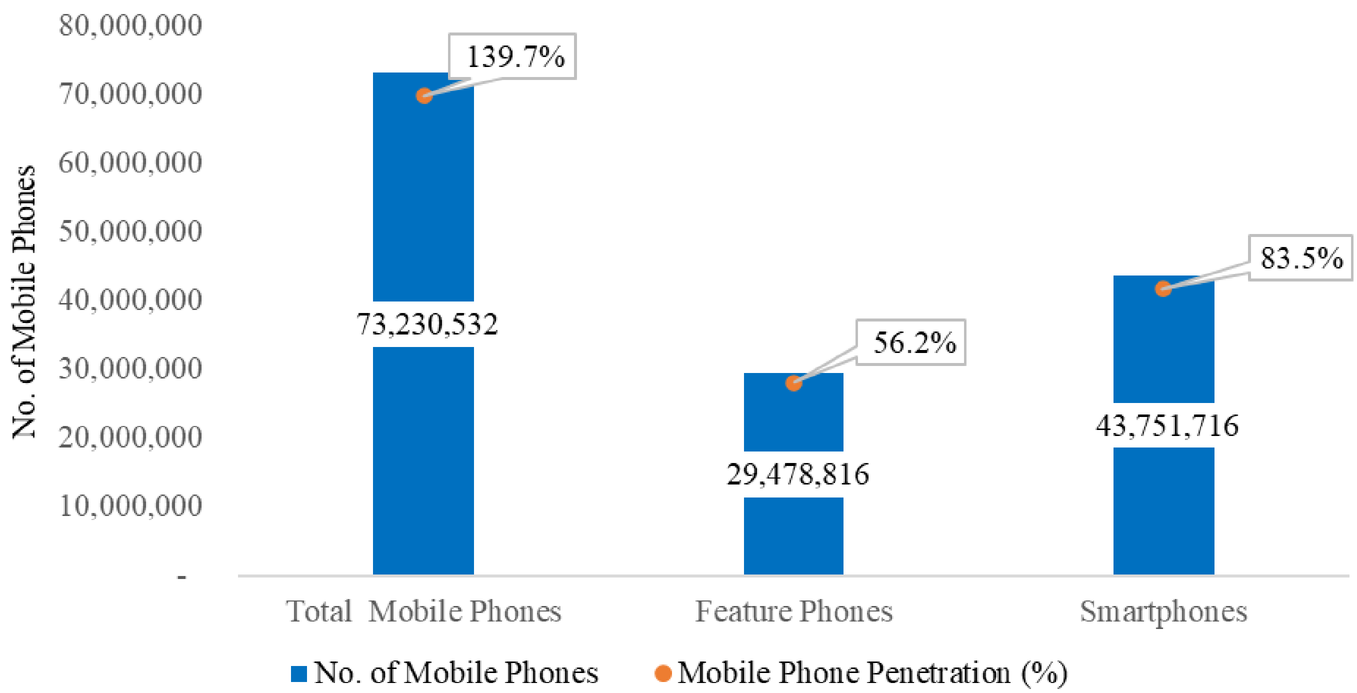


Source: CA, Operators' Returns, Q3 revised data for Telkom Kenya Limited

Figure 7: Mobile Market Shares

1.6 Mobile Phone Devices

By the end of the reporting period, 73.2 million mobile phones were connected to mobile networks, translating to a penetration rate of 139.7 percent. Smartphone and feature phone penetration rates stood at 83.5 percent and 56.2 percent, respectively as illustrated in Figure 8.



Source: CA, Operators' Returns

Figure 8: Mobile Phone Devices

1.7 Domestic Mobile Voice and SMS Traffic

As shown in Table 2, total domestic voice traffic stood at 29.17 billion minutes in the quarter under review compared to 28.81 billion minutes in the previous quarter. Similarly, voice traffic for the 2024/25 FY increased by 16.5 per cent to 111.6 billion compared to 95.8 billion minutes in 2023/24 FY. Furthermore, SMS traffic grew by 6.5 per cent to 15.25 billion. SMS traffic volume for the 2025/26 FY increased to 57.3 billion from 53.2 billion messages recorded in 2023/24 FY.

Table 2:Domestic Mobile Traffic per Operator

Name of Operator /Indicator			***Safaricom PLC***	***Airtel Networks Kenya Ltd***	***TKL***	***Finserve***	***JTL***	***Total***
Apr-Jun 25	***Voice***	***Total***	**18,498,592,777**	**10,596,502,649**	**34,794,970**	**22,344,869**	**13,500,576**	**29,165,735,841**
		On-net	17,029,648,270	7,482,202,145	17,336,927	1,430,197	840,422	24,531,457,961
		Off-net	1,468,944,507.0	3,114,300,504	17,458,043	20,914,672.0	12,660,154	4,634,277,880
	SMS	***Total***	**13,488,025,294**	**1,751,336,275**	**3,869,044.0**	**3,704,938**	**554,477**	**15,247,490,028**
		On-net	12,574,004,837	962,406,708	66,301	1,159,058	47,455	13,537,684,359
		Off-net	914,020,457	788,929,567	3,802,743	2,545,880	507,022	1,709,805,669
Jan-Mar 25**	***Voice***	***Total***	**18,299,975,382**	**10,438,184,258**	**108,718,702**	**22,631,879**	**8,684,867**	**28,811,960,471**
		On-net	16,879,797,254	7,424,016,359	22,167,149	1,351,098	100,335	24,327,432,195

		Off-net	1,420,178,128	3,014,167,899	20,316,936	21,280,781	8,584,532	4,484,528,276
	SMS	***Total***	**12,727,934,816**	**1,576,016,443**	**8,509,754**	**4,464,351**	**704,597**	**14,314,059,575**
		On-net	11,836,947,112	818,777,675	307,606	1,121,054	51,686	12,657,205,133
		Off-net	890,987,704	757,238,768	4,631,762	3,343,297	652,911	1,656,854,442
FY 2024/25	***Voice***	***Total***	**71,243,482,569**	**39,939,775,028**	**294,716,459**	**89,505,700**	**40,283,174**	**111,607,762,930**
		On net	65,629,653,806	28,431,760,868	155,454,682	5,814,468	1,156,928	94,223,840,752
		Off-net	5,613,828,763	11,508,014,160	139,261,777	83,691,232	39,126,246	17,383,922,178
	SMS	***Total***	**50,773,039,884**	**6,516,660,927**	**27,661,616**	**13,697,808**	**3,327,747**	**57,334,387,982**
		On-net	47,249,028,063	3,260,385,749	2,822,815	2,895,324	178,955	50,515,310,906
		Off-net	3,524,011,821	3,256,275,178	24,838,801	10,802,484	3,148,792	6,819,077,076
FY 2023/24	***Voice***	***Total***	**62,041,878,563**	**33,128,634,799**	**513,786,250**	**91,106,594**	**23,248,198**	**95,798,654,405**
		On-net	57,561,542,795	24,310,620,482	271,411,535	6,983,055	287,685	82,150,845,552
		Off-net	4,480,335,769	8,818,014,317	242,374,715	84,123,539	22,960,513	13,647,808,853
	SMS	***Total***	**47,628,602,243**	**5,537,480,155**	**16,736,051**	**52,457,844**	**3,590,286**	**53,238,866,579**
		On-net	44,318,493,302	2,608,004,535	5,656,965	3,280,700	192,905	46,935,628,407
		Off-net	3,310,108,941	2,929,475,620	11,079,086	49,177,144	3,397,381	6,303,238,172

Source: CA, Operators' Returns, Q3(Jan-Mar) revised data for Telkom Kenya Limited

1.8 Minutes of Use per Call per Operator

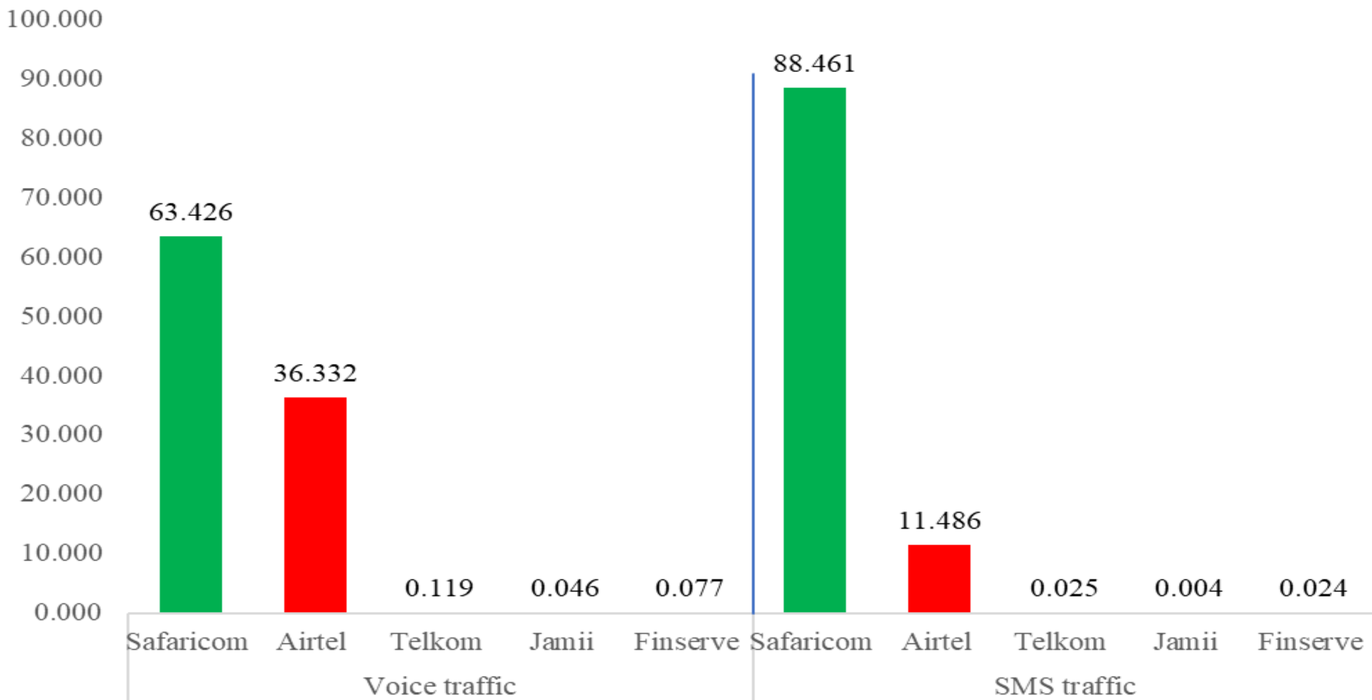
Table 3 shows the average minutes of use per call by operator. The average on-net and off-net call durations were recorded at 1.9 and 1.3 minutes, respectively, in the quarter under review. Airtel customers recorded the longest on-net calls at 3.1 minutes, while Jamii Telecom registered the highest off-net calls at 1.7 minutes.

Table 3: MoU per Call

Period	***Apr-Jun 25***		***Jan-Mar 25***		***Apr-Jun 24***	
Operator/Indicator	**On-net**	**Off-net**	**On-net**	**Off-net**	**On-net**	**Off-net**
Total Average	**1.9**	**1.3**	**1.8**	**1.3**	**1.8**	**1.2**
Safaricom PLC	1.6	1.1	1.6	1.4	1.6	1.4
Airtel Networks Limited	3.1	1.5	2.9	1.3	2.8	1.2
Telkom Kenya Limited	2.7	1.2	1.5	1.1	1.3	1.2
Finserve (Equitel)	1.4	1.2	2.0	1.3	2.0	1.3
Jamii Telecommunications Ltd	1.4	1.7	0.1	1.4	0.1	1.3

Source: CA, Operators' Returns, Q3(Jan-Mar) revised data for Telkom Kenya Limited

1.9 Market shares in Domestic Mobile Voice and SMS Traffic



Source: CA, Operators' Returns, Q3(Jan-Mar) revised data for Telkom Kenya Limited

Figure 9: Market Shares in Domestic Mobile Voice and SMS

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

Minutes of Use per subscription per month increased slightly from 126.5 quarter three to 126.8 in quarter four whereas short messages per month/subscription rose from 62.7 to 66.3 messages. On the other hand, the average Minutes of Use per subscription per month increased from 120.4 to 126.8 minutes, while the average number of short messages rose from 65.4 to 66.3, compared to Jun 2023 as shown in Figure 10.

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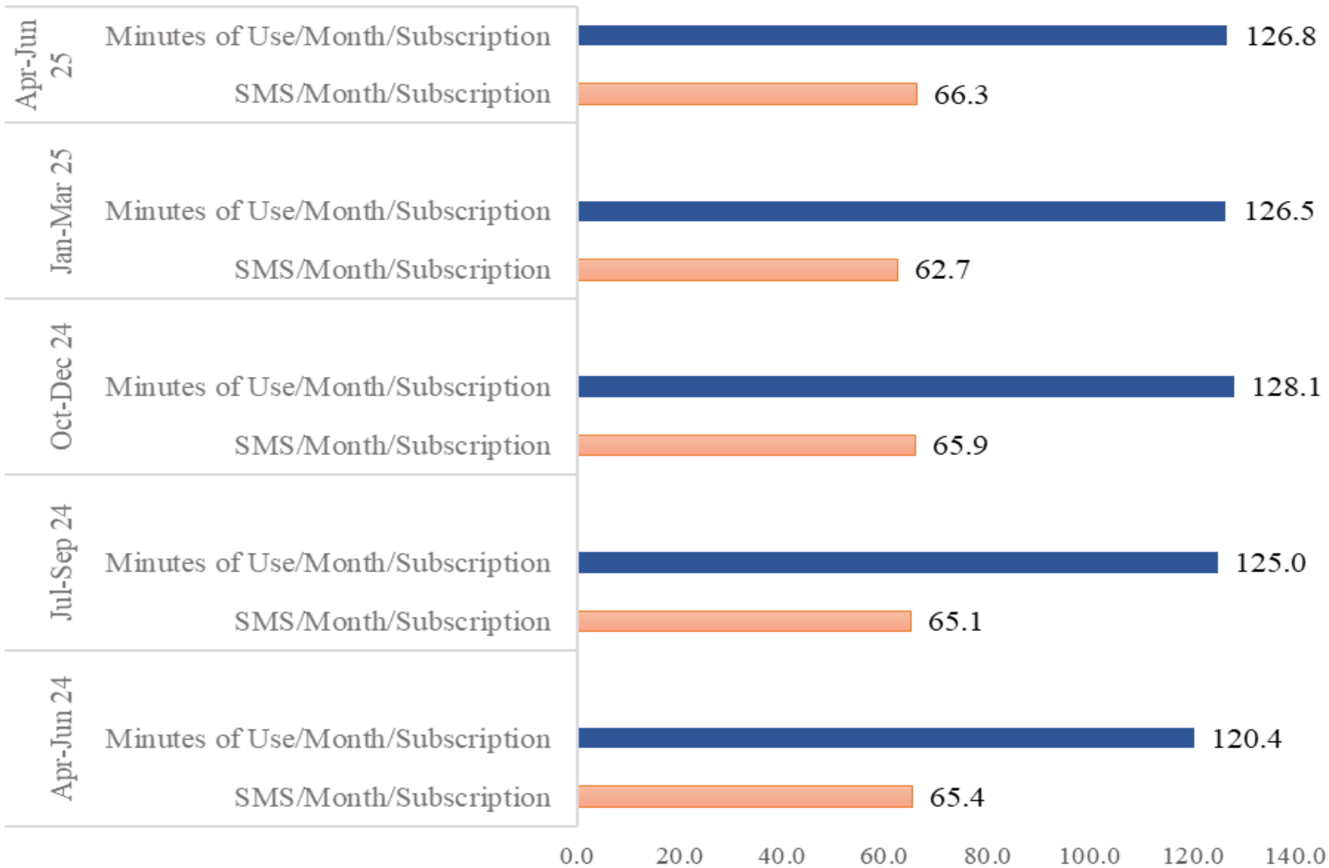


Source: CA, Operators' Returns, Provisional Data for Telkom Kenya Limited

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

1.11 International Mobile Traffic

International incoming mobile voice traffic grew to 167.20 million minutes, while outgoing traffic rose to 200.3 million from 179.8 million minutes. The year-on-year traffic growth for international incoming and outgoing mobile voice traffic was 48.0 and 0.9 per cent respectively. International incoming and outgoing SMS year-on-year declined by 22.4 and 16.8 per cent respectively. This decline is attributed to the increased uptake of internet services through which consumers can send messages in various forms such as picture, document and text formats.

Table 4: International Mobile Traffic

Indicator/Period	***Region***	***Apr-Jun 25***	***Jan-Mar 25***	***Quarterly Variation (%)***	***FY 2024/25***	***FY 2023/24***	***Annual Variation (%)***
International Incoming Mobile Voice Minutes	*EAC*	114,450,361	114,165,758	0.2	439,434,760	313,248,926	40.3
	Others	52,749,521	49,127,598	7.4	167,782,370	97,169,214	72.7
	Total	**167,199,882**	**163,293,356**	**2.4**	**607,217,130**	**410,418,140**	**48.0**

International Outgoing Mobile Voice Minutes	*EAC*	153,699,087	139,808,506	9.9	546,280,447	457,646,505	19.4
	Others	46,570,614	39,978,285	16.5	186,356,818	268,550,510	-30.6
	Total	**200,269,701**	**179,786,791**	**11.4**	**732,637,265**	**726,197,015**	**0.9**
International Incoming Mobile SMS		5,631,540	6,444,348	-12.6	27,835,607	35,864,247	-22.4
International Outgoing Mobile SMS		2,704,693	2,705,509	0.0	12,458,851	14,970,432	-16.8

Source: CA, Operators' Returns, Q3 (Jan-Mar) revised data for Telkom Kenya Limited

1.12 Roaming Traffic

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

Table 5: Outbound Roaming Traffic

Country / Indicator	***Incoming Voice (Minutes)***	***Incoming SMS***	***Outgoing Voice (Minutes)***	***Outgoing SMS***	***Data Volumes (MB)***
Uganda	142,218,851	11,629	4,185,814	1,075,244	53,620,851
Tanzania	18,452,649	23,735,185	1,108,385	631,471	17,408,522
Rwanda	3,553,978	0	264,513	86,716	4,794,176
Burundi	119,579	1,575,117	3,354	6,361	6,462
South Sudan	8,197,157	0	549,484	220,876	1,058,040
Democratic Republic of Congo	4,267	102,250	96,243	26,657	4,714,238
EAC Total	172,546,481	25,424,181	6,207,793	2,047,325	81,602,289
Others	1,227,431	69,356,259	3,361,994	2,462,120	42,956,153
Total	346,320,393	120,204,621	15,777,580	6,556,770	206,160,731

Source: CA, Operators' Returns

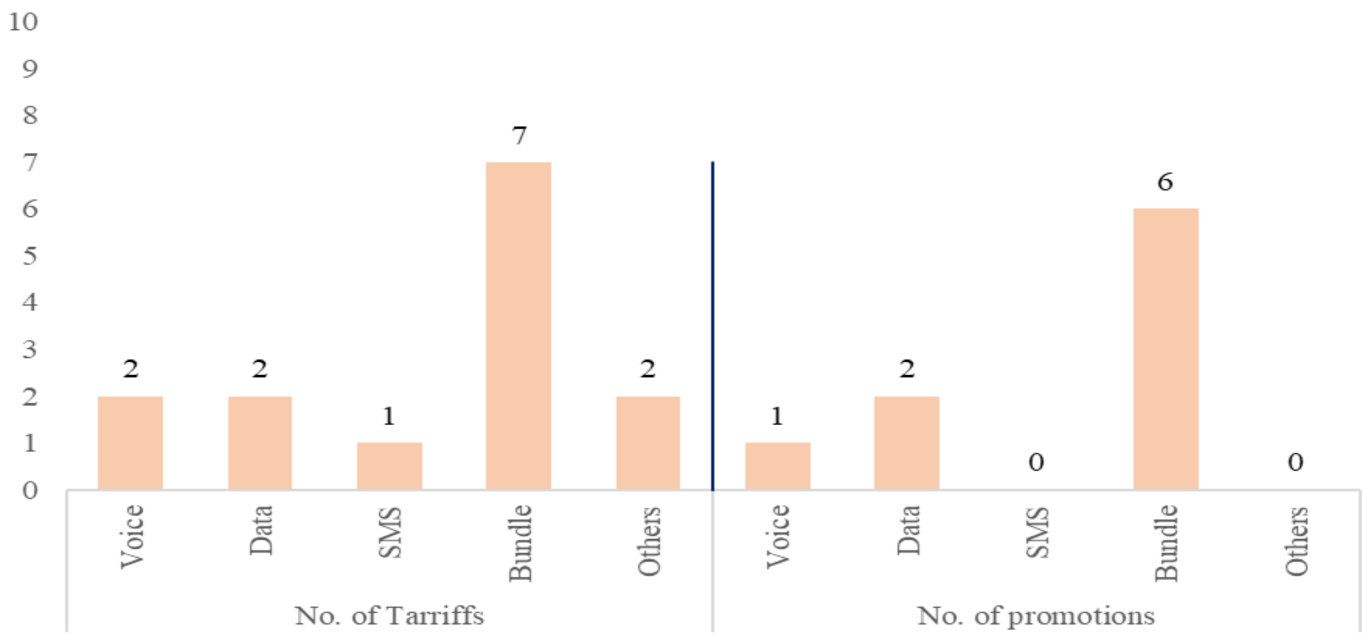
Table 6: In-bound Roaming Traffic

Country / Indicator	***Incoming Voice (Minutes)***	***Incoming SMS***	***Outgoing Voice (Minutes)***	***Outgoing SMS***	***Data Volumes (MB)***
Uganda	32,786,820	6,019,539	1,658,025	211,220	22,002,527
Tanzania	119,617,475	20,261,452	657,308	271,661	2,800,162
Rwanda	22,656,468	2,505,201	158,612	31,479	417,255
Burundi	1,760	3,873	425	7,050	196
South Sudan	1,099,755	5,032,662	106,105	15,418	154,038
Democratic Republic of Congo	7,679	190,704	71,993	7,784	327,373
EAC Total	176,169,957	34,013,431	2,652,468	544,612	25,701,551
Others	837,630	23,130,590	1,551,899	1,152,282	528,226,160
Total	353,177,544	91,157,452	6,856,835	2,241,506	579,629,262

Source: CA, Operators' Returns

1.13 Tariffs, Promotions and Special Offers

Figure 11 illustrates the number of approved tariffs, promotions and special offers filed by MNOs during the fourth quarter, categorized by service type.



Source: CA, tariffs, promotions and special offers

Figure 11: Distribution of Tariffs, Promotions and Special Offer

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

Pay-As-You-Go charges for voice, SMS, and data services are as shown in Table 7.

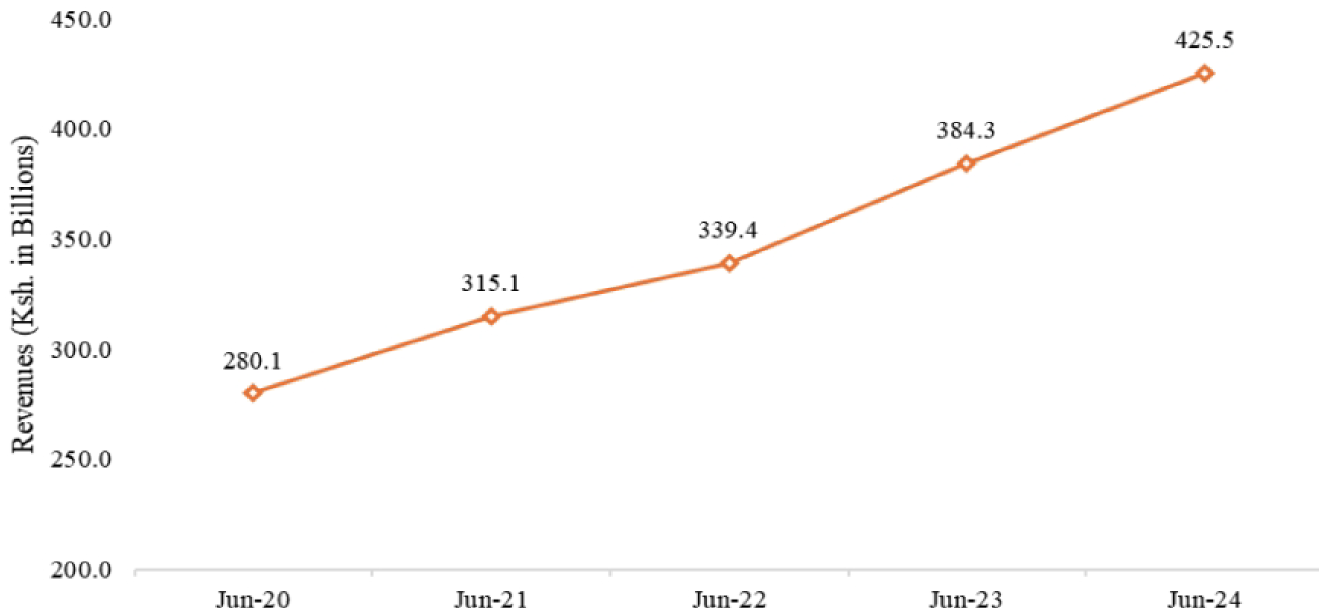
Table 7: Average Pay-As-You-Go (PAYG) Tariffs

Operator/Market	*Average Voice (KES/Min)*	*SMS (KES/SMS)*	*Data (KES/MB)*
Safaricom PLC	4.87	1.20	4.87
Airtel Network Limited	2.93	1.20	4.50
	4.53	1.20	4.50
Telkom Kenya Limited	4.50	1.15	4.00
Average	4.21	1.19	4.47

Source: CA

1.15 Mobile Service Revenue and Investment

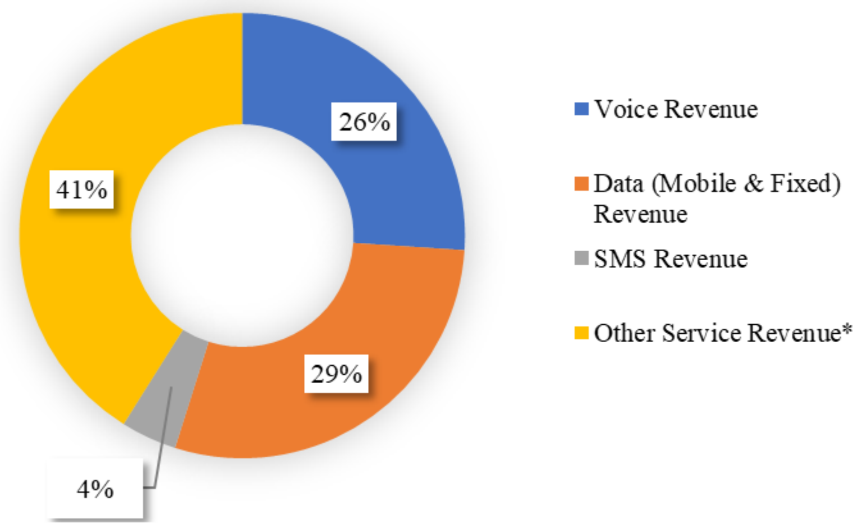
In 2024, mobile services generated KSh. 425.5 billion in revenues which was an increase of 10.7% when compared to KSh. 384.3 billion reported in 2023 as shown in Figure 12.



Other Mobile Services* *include roaming, bulk SMS, airtime by credit, revenues and mobile money revenues*

Figure 12: Distribution of Tariffs, Promotions and Special

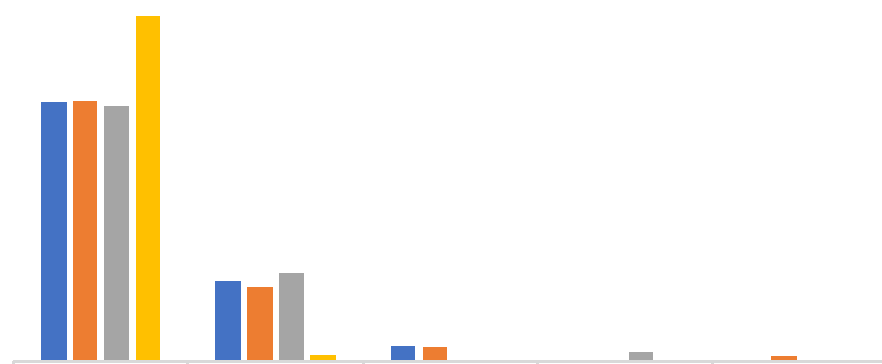
Other service revenue, which includes roaming, bulk SMS, airtime by credit and mobile money revenues constituted the greatest share of 2024 mobile service revenues at 41.1 per cent. The revenue shares for the respective mobile services is as shown in Figure 13.



*Source: CA, Operators' Returns, Provisional data for TKL, *includes mobile money, Roaming Revenues, Bulk SMS, "advance airtime" etc.*

Figure 13: % Revenue per Service

Figure 14 shows the percentage shares in revenue based on services per operator.



	Safaricom PLC	Airtel Networks Ltd	Telkom Kenya Limited **	Finaserve Africa Limited	Jamii Telecommunications Limited
Voice Revenue	72.9	22.5	4.4	0.2	-
Data (Mobile & Fixed) Revenue	73.3	20.7	4.3	0.1	1.6
SMS Revenue	72.3	24.9	-	2.9	-
Other Service Revenue*	97.3	2.0	0.7	-	-

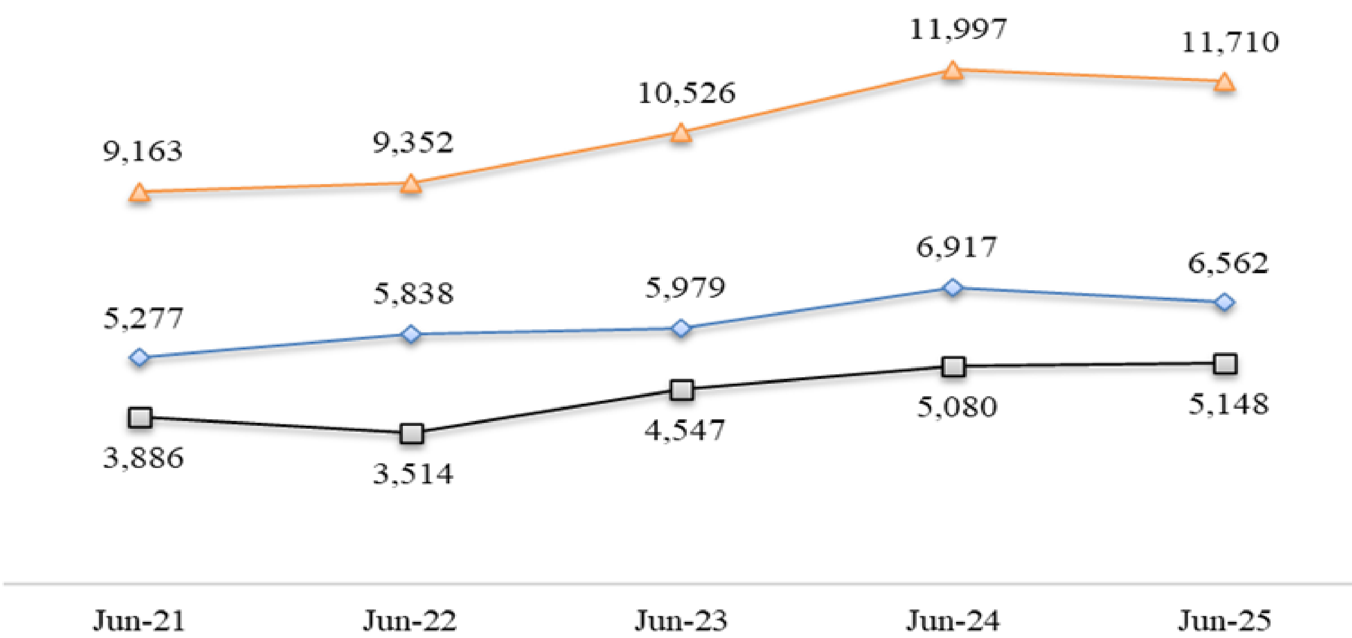
Voice Revenue   Data (Mobile & Fixed) Revenue   SMS Revenue   Other Service Revenue*

*Source: CA, Operators' Returns, * includes mobile money, Roaming Revenues, Bulk SMS*, *Jamii Telecom provides data services only,*

Figure 14: % Shares in Revenue by Operator

1.16 Employment in the Mobile Sub-Sector

The number of persons employed by MNOs and MVNO declined by 2.4 per cent to 11,710 as of 30th June 2025. The male to female ratio was 56:44 compared to 57:43 in June 2024.The five-year trend in employment within the mobile sub-sector is as shown in Figure 15.



Source: CA, Operators' Returns

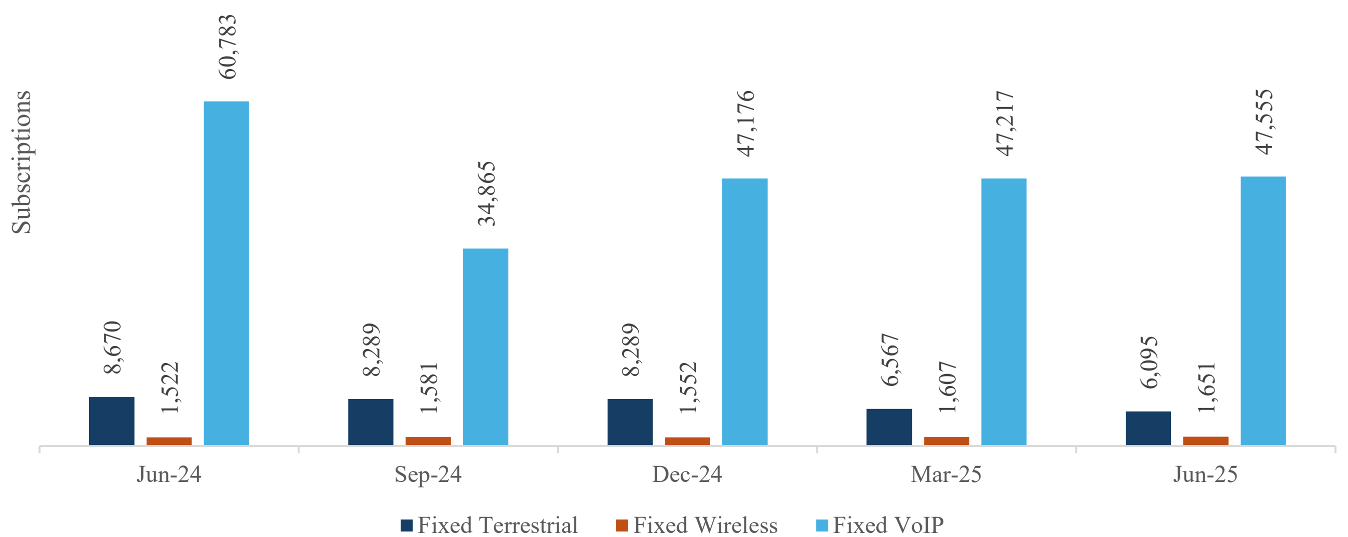
Figure 15: Employment in Mobile Sub-Sector

2. FIXED NETWORK SERVICES

2.1 Fixed Telephone Subscriptions

The number of fixed VoIP and fixed wireless subscriptions have declined by 21.8 and 45.2 per cent since June 2024 to post 47,555 and 6,095 respectively as at June 2025. On the other hand, fixed lines have increased by 8.5 per cent over the same period to post 1,651 as at June 2025.

Figure 16 shows the five-year trend in fixed telephone subscriptions.



Source: CA, Operators' Returns, Q3 (Jan-Mar) revised data for Telkom Kenya Limited

Figure 16: Fixed Voice Subscriptions

2.2 Domestic Fixed Voice Traffic

As shown in Table 9, the total domestic fixed voice traffic dropped by 6.0 percent to 1.11 million minutes from 1.18 million minutes reported in the previous quarter. Fixed-to-mobile minutes declined by 7.1 percent to 705,984 minutes. Further, fixed-fixed minutes recorded a drop of 18.1 percent, while fixed wireless traffic registered a growth of 0.9 percent.

Table 8: Domestic Fixed Voice Traffic (Minutes)

Domestic Fixed Voice Traffic (Minutes)	*Apr-Jun 25*	*Jan-Mar 25*	*Quarterly Variation (%)*	*FY 2024/25*	*FY 2023/24*	*Annual Variation (%)*
Fixed-Fixed	89,868	109,774	-18.1	418,868	501,766	-16.5
Fixed Wireless-Fixed Wireless	315,263	312,473	0.9	1,175,344	1,083,571	8.5
Fixed-Mobile	705,984	759,776	-7.1	41,358,602	84,590,112	-51.1
Total Domestic Fixed Network Traffic	**1,111,115**	**1,182,023**	**-6.0**	**42,952,814**	**86,175,449**	-50.2

Source: CA, Operators' Returns, Q3 (Jan-Mar) revised data for Telkom Kenya Limited

2.3 International Fixed Voice Traffic

International incoming fixed voice traffic grew by 5.5 percent, from 4.78 million minutes in the previous quarter to 5.0 million minutes in the quarter under review. On the other hand, international outgoing fixed voice traffic and VoIP traffic declined by 24.4 percent and 9.1 percent, to 874,473 minutes and 515,682 minutes, respectively, during the period under review. Year-on-year international incoming voice traffic, international outgoing voice traffic, and international outgoing VoIP traffic declined by 10.0 percent, 0.7 percent, and 3.5 percent, respectively, as shown in Table 9.

Table 9: International Fixed Voice Traffic

Indicator/Period	*Apr-Jun 25*	*Jan-Mar 25*	*Quarterly Variation (%)*	*FY 2024/25*	*FY 2023/24*	*Annual Variation (%)*
International Incoming Fixed Network Voice traffic	5,042,602	4,778,284	5.5	19,706,314	21,891,465	-10.0
International Outgoing Fixed Network Voice traffic	874,473	1,156,680	-24.4	4,026,246	4,054,519	-0.7
International Outgoing Fixed VoIP traffic	515,682	567,500	-9.1	2,125,922	2,203,762	-3.5

Source: CA, Operators' Returns, Q3 (Jan-Mar) revised data for Telkom Kenya Limited

2.4 Fixed Internet Subscriptions by Technology

As shown in Table 11, in quarter four total data/Internet subscriptions grew by 42.9 per cent to 2.1 million by 30th June 2025. Terrestrial wireless, satellite, fibre and other fixed data subscriptions grew by 102.2, 115.5, 28.5 and 70.1 per cent respectively as shown in table 10.

Table 10: Fixed Internet Subscriptions by Technology

Indicator/Period	*Jun 25*	*Mar 25*	*Quarterly Variation (%)*	*Jun 24*	*Annual Variation (%)*
Terrestrial Wireless	721,167	636,117	13.4	356,721	102.2
Satellite	17,939	17,492	2.6	8,324	115.5
DSL (Copper)	31	31	0.0	137	-77.4
Fibre Optic	1,207,583	1,131,409	6.7	939,553	28.5
Cable Modem	196,486	201,433	-2.5	195,319	0.6
Other Fixed Data Subscribers	1,507	1,409	7.0	886	70.1
Total Subscriptions	**2,144,713**	**1,987,891**	**7.9**	**1,500,940**	**42.9**

Source: CA, Operators' Returns, Revised Q3 data for Telkom Kenya Limited and Ahadi Wireless Ltd

2.5 Fixed Data and Broadband Subscriptions

Fixed data/internet customers were mainly subscribed to speeds between 10 Mbps and 30 Mbps, followed by 2 Mbps to 10 Mbps and 30 Mbps to 100 Mbps. Customers subscribed to speeds greater than 1 Gbps were mainly offices on fibre technology (FTTO) as shown in Table 11.

Table 11: Fixed Data and Broadband Subscriptions

Internet Technology /Speeds	*<256Kbps*	*=>256Kbps < 2Mbps*	*=>2 Mbps <10 Mbps*	*=>10Mbps <30 Mbps*	*=>30 Mbps <100Mbps*	*=>100 Mbps <1Gbps*	*=>1Gbps*	*Totals*
Cable Modem	-	-	21,534	168,923	5,868	161	-	**196,486**
Copper (DSL)	-	-	31	-	-	-	-	**31**
FTTH	-	3,907	249,268	522,361	190,617	139,750	3	**1,105,906**
FTTO	-	4,319	12,902	34,443	28,551	20,846	616	**101,677**
Fixed Wireless	35,111	41,417	433,431	147,486	57,347	6,375	-	**721,167**
Satellite	3	113	7	130	-	17,606	80	**17,939**
Other Fixed	0	34	680	560	179	52	2	**1,507**
Totals	**35,114**	**49,790**	**717,853**	**873,903**	**282,562**	**184,790**	**701**	**2,144,713**

Source: CA, Operators' Returns

2.6 Top 10 Operators in Fixed Data/Internet Subscriptions

Safaricom PLC topped in fixed data/Internet subscriptions with a market share of 34.3 per cent, followed by Jamii Telecommunications Limited at 20.6 per cent. Ahadi Wireless Limited appeared in the top ten list of fixed internet service providers, as shown in Table 12. Ahadi Wireless Limited joined the top ten (10) categories with a market share of 7.5 per cent.

Table 12: Fixed Data Subscriptions by Operator

Service Provider/Indicator	*Number of data subscriptions*	*Percentage Market share (%)*
Safaricom PLC	735,749	34.3
Jamii Telecommunications Ltd	442,076	20.6
Wananchi Group (Kenya) Limited*	271,822	12.7
Poa Internet Kenya Ltd	268,554	12.5
Ahadi Wireless Limited	160,254	7.5
Vilcom Network Limited	87,654	4.1
Mawingu Networks Ltd	76,650	3.6
Dimension Data Solutions East Africa Limited	19,388	0.9
Starlink Internet Services Kenya	17,425	0.8
Liquid Telecommunications Kenya	16,366	0.8
Others	48,775	2.3

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

2.7 International Bandwidth

The total lit/available international bandwidth capacity in the country decreased by 12.5 percent from 22,154.438 Gbps to 19,381.445 Gbps by end of June 2025. SEACOM Ltd and EASSY (which operates under Telkom) had a reduction in their lit capacity during the quarter.

Table 13: International Internet Bandwidth (Gbps)

Indicator/ Period	*Apr-Jun 25*			*Jan-Mar 25*	*Quarterly Variation (%)*	*Apr-Jun 24*	*Annual Variation (%)*
Total Available (Lit/Equip) Bandwidth Capacity (Gbps)			**22,311.445**	**22,154.438**	**0.7**	**21,244.338**	**4.3**
Undersea Bandwidth Capacity	**SEACOM**		6,850.000	6,850.000	0.0	6,850.000	0.0
	TEAMS		4,063.000	4,063.000	0.0	4,063.000	0.0
	Telkom Kenya	***EASSY***	6,170.000	6,420.000	-3.9	6,290.000	-1.9
		Lion 2	810.000	810.000	0.0	707.500	14.5
		DARE 1	1,890.000	1,780.000	6.2	1,670.000	13.2
		PEACE	2,528.000	2,231.000	13.3	1,661.000	52.2
Satellite Bandwidth Capacity			0.445	0.438	1.6	2.838	-84.3

Source: CA, Operators' Returns

Undersea bandwidth capacity utilized within the country increased from 9,589 Gbps in quarter three to 10,735 Gbps in quarter four. Further, satellite capacity increased by 1.6 per cent from 0.438 Gbps in the previous quarter to 0.445 Gbps in the reference period as shown in Table 14.

Table 14: Total Utilized Bandwidth Capacity (Gbps)

Indicator/ Period	***Apr-Jun 25***		***Jan-Mar 25***		***Quarterly Variation (%)***
	Sold In Kenya	***Sold in other Countries***	***Sold In Kenya***	***Sold in other Countries***	
Undersea Bandwidth Capacity	10,735.0	2,953.8	9,589.9	2,953.8	9.1
Satellite Internet Capacity		0.445		0.438	1.6

Source: CA, Operators' Returns, Revised Q3 (Jan-Mar) data for SEACOM on utilized bandwidth capacity in Kenya, Revised Q3 data to exclude data volumes consumed by Starlink.

3. POSTAL AND COURIER SERVICES

3.1 Designated Public Postal Operator (PCK) Traffic

During the reference period, the volume of domestic letters posted through Postal Corporation of Kenya (PCK) increased by 19.5 percent to 174,057 whereas international outgoing and incoming letters increased by 16.2 percent and 4.9 percent to 17,106 and 24,571, respectively. Domestic and international parcels, however, recorded a drop in volumes during the quarter as shown in Table 15.

Table 15: PCK Items

Indicator /Period		***Apr-Jun 25***	***Jan-Mar 25***	***Quarterly Variation (%)***	***FY 2024/25***	***FY 2022/23***	***Annual Variation (%)***
Letters	Domestic	174,057	145,627	19.5	1,940,804	1,248,482	55.5
	International Outgoing	17,106	14,727	16.2	47,134	228,939	-79.4
	International Incoming	24,571	23,435	4.9	974,930	155,430	527.2
Parcels	Domestic	141,932	161,331	-12.0	1,486,850	137,764	979.3
	International Outgoing	13,020	111,850	-88.4	148,529	1,322,132	-88.8
	International Incoming	107,035	108,416	-1.3	947,018	797,780	18.7

Source: CA, Operators' Returns

3.2 Private Courier Traffic

Table 16 illustrates private courier traffic for the period from April 1st to June 30th, 2025, and for the 2023/24 and 2024/25 financial years.

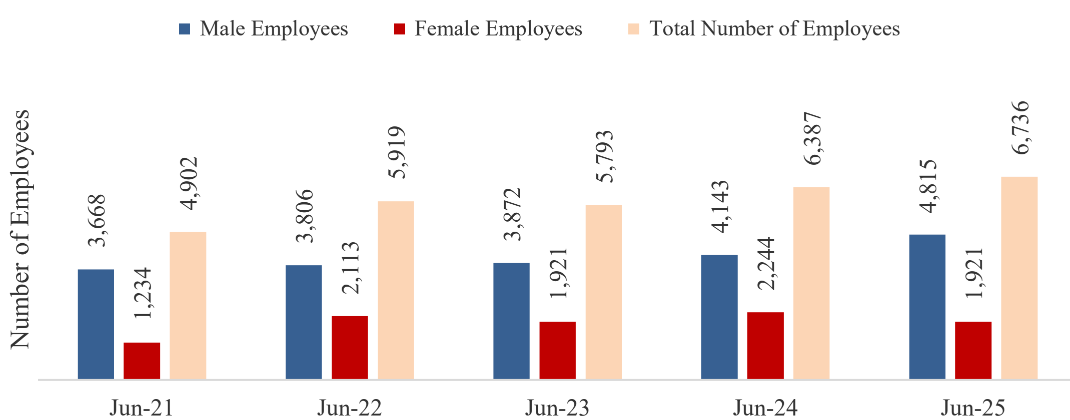
Table 16: Courier Items

Indicator/ Period		***Apr-Jun 25***	***Jan-Mar 25***	***Quarterly Variation (%)***	***FY 2024/25***	***FY 2022/23***	***Annual Variation (%)***
Letters	Domestic	769,458	764,948	0.6	3,310,558	1,491,064	122.0
	International Outgoing	8,738	23,506	-62.8	54,799	1,473,045	-96.3
	International Incoming	32,040	39,540	-19.0	113,616	410,582	-72.3
Parcels	Domestic	3,012,791	2,762,007	9.1	13,193,999	6,587,378	100.3
	International Outgoing	24,809	24,638	0.7	214,042	2,988,375	-92.8
	International Incoming	30,583	194,148	-84.2	1,160,934	2,261,298	-48.7

Source: CA, Operators' Returns

3.3 Employment in Courier Market Segment

Figure 17 shows the number of employees in postal/courier services by the end of June 2025. The total number of people employed in postal/courier services increased from 6,387 to 6,736 between June 30th, 2024, and June 30th, 2025.



Source: CA, Operators' Returns, 2024 data revised to include PCK employees

Figure 17: Employment in Postal and Courier

3.4 Revenues in Courier Market Segment

The total revenues reported by private courier operators offering national and international courier services grew by 1.0 percent in 2024 to KSh. 6.28 billion. Additionally, revenues collected by national courier operators increased by 33.3 percent, from 0.90 billion reported in 2023 to 1.20 billion in 2024, as shown in Table 17.

Table 17: Revenues in Courier Market Segment

Indicator/Period	*2024*	*2023*	*Annual Variation (%)*
National Courier Revenue (Billion) in KES	1.20	0.90	33.3
International Courier Revenue (Billion) in KES	5.08	5.32	-4.5
Total Revenues in KES	6.28	6.22	1.0

Source: CA, Operators' Returns, only includes revenues generated through Courier services

4. BROADCASTING SERVICES

4.1 Subscription to Broadcasting Services

During the reference period, the Authority reviewed the data collection tool for broadcasting services subscriptions to capture active subscriptions only. [Active subscription is one that has generated revenue in the last 3 months (90 days)] subscriptions instead of cumulative registered subscriptions collected in the previous periods. This review has resulted in significant decline in DTH and DTT subscriptions as shown in Table 18.

Table 18: Broadcasting Active Subscriptions

Indicator/Period		*Jun-25*	*Mar-25*	*Quarterly Variation (%)*	*Jun-25*	*Jun-24*	*Annual Variation (%)*
DTT	Go TV	314,520	362,543	-13.2	314,520	2,793,579	-88.7
	Star Times	492,330	496,322	-0.8	492,330	1,693,340	-70.9
	Sub-Total	**806,850**	**858,865**	**-6.1**	**806,850**	**4,486,919**	**-82.0**
DTH	Azam	30,095	28,258	6.5	30,095	81,553	-63.1
	MultiChoice (DSTV)	188,824	230,777	-18.2	188,824	1,195,775	-84.2
	Star Times	195,948	192,241	1.9	195,948	361,953	-45.9
	Wananchi (Zuku)	187,839	193,105	-2.7	187,839	202,416	-7.2
	Sub-Total	**602,706**	**644,381**	**-6.5**	**602,706**	**1,841,697**	**-67.3**
Cable	Cable One	1,316	1,296	1.5	1,316	2,758	-52.3
	CTN (MSA)	484	532	-9.0	484	2,067	-76.6
	Wananchi (ZUKU)	64,212	78,832	-18.5	64,212	53,898	19.1
	Hirani	758	758	0.0	758	758	0.0
	Wadani Cable	95	95	0.0	95	95	0.0
	Sub-Total	**66,865**	**81,513**	**-18.0**	**66,865**	**59,576**	**12.2**
Total		**1,476,421**	**1,584,759**	**-6.8**	**1,476,421**	**6,388,192**	**-76.9**

Source: CA, Operators' Returns, Data reviewed to capture active subscriptions only

5. FREQUENCY SPECTRUM MANAGEMENT

The Authority assigned 10,311 frequencies to various operators for deployment of microwave links and 1,010 FM sound broadcasting frequencies as shown in Table 19.

Table 19: Frequency Spectrum Management

Indicator/Period	*Apr-Jun 25*	*Jan-Mar 25*	*FY 2024/25*	*FY 2023/24*
Assigned Microwave Links	10,311	11,458	43,942	1,036
FM Sound Broadcasting Frequencies Assigned	1,010	1,035	4,147	38

Source: CA

6. ELECTRONIC TRANSACTIONS AND CYBER SPACE MANAGEMENT

6.1 Registered Domain Names

Table 20 illustrates various registered sub-domains and their respective number of users as of June 30th, 2025.

Table 20: .KE Domains

SUB-DOMAIN	*USER*	*Number of Users*					
		Jun-25	*Mar-25*	*Quarterly Variation (%)*	*Jun-25*	*Jun-24*	*Annual Variation (%)*
Total		**111,313**	**109,251**	**1.9**	**111,313**	**106,800**	**4.2**
CO.KE	Companies	98,808	96,857	2.0	98,808	90,165	9.6
ME.KE	Personal Websites and E-mail	210	362	-42.0	210	5,806	-96.4
.KE	Second level	6,709	6,559	2.3	6,709	5,721	17.3
OR.KE	Non-Profit-Making Organizations	2,061	2,059	0.1	2,061	1,979	4.1
AC.KE	Institutions of Higher Education	1,386	1,330	4.2	1,386	1,162	19.3
SC.KE	Lower and Middle-Level Institutions	1,061	1,025	3.5	1,061	918	15.6
GO.KE	Government Institutions	857	838	2.3	857	770	11.3
INFO.KE	Information	129	138	-6.5	129	206	-37.4
NE.KE	Personal Websites and E-mail	65	55	18.2	65	46	41.3
MOBI.KE	Mobile Content	27	28	1.9	27	27	0.0

Source: Kenic.

7. NATIONAL CYBER SPACE LANDSCAPE

The total cyber threats detected rose by 80.8 percent from 2.5 billion reported last quarter to 4.6 billion in the reference period. Consequently, total cyber advisories increased by 30.6 per cent as shown in Table 21. The general increase in cyber threats is attributable to the upgrade of KE-CIRT tools that resulted in wider cyber surveillance.

Table 21: Cybersecurity Landscape

Indicator/ Period	*Threats and Advisories*	*Apr-Jun 25*	*Jan–Mar 25*	*Quarterly Variation (%)*
Threats	Malware	47,397,554	24,549,413	93.1
	Brute Force Attacks	20,947,973	33,794,288	-38.0
	Web Application Attacks	12,742,473	5,081,236	150.8
	System Vulnerabilities	4,492,325,076	2,470,257,079	81.9
	Mobile Application Attacks	189,004	68,063	177.7
	DDOS	13,080,197	3,678,789	255.6
	Total Cyber Threats	**4,586,682,277**	**2,537,428,868**	**80.8**
Advisories	Malware	556,674	428,974	29.8
	Brute Force Attacks	1,486,534	1,653,920	-10.1
	Web Application Attacks	7,014,981	4,402,724	59.3
	System Attacks	6,884,107	5,951,881	15.7
	Mobile Application attacks	25,561	13,239	93.1
	DDOS	1,301,192	776,772	67.5
	Total Cyber Advisories	**17,269,049**	**13,227,510**	**30.6**

Source: National KE-CIRT/

8. CONCLUSION

The 2024/2025 financial year was marked by increased uptake of mobile SIM, mobile money, machine-to machine, broadband services both mobile and fixed. This trend was mainly driven by the expansion of mobile cellular networks with 4G and 5G population coverage of 97.3 and 30.0 per cent respectively. Also, the rollout of 2,275 kilometers out of the planned 2,500 kilometers of fibre optic infrastructure under the CA-ICT Authority project coupled with competitive tariffs, promotions, and special offers launched by the operators during the financial year played a key role. Notably, the increase may also have been influenced by the rising demand for E-services, social and financial inclusion, and the continued shift from feature phones to smartphones which has broadened internet accessibility, driven data consumption, and advanced digital inclusion across sectors. The combined effect of affordable devices and improved infrastructure has sustained this growth, enabling deeper integration of online services into both social and economic activities.