FOURTH QUARTER SECTOR STATISTICS REPORT FOR THE FINANCIAL YEAR 2025/2026 (1ST APRIL – 30TH JUNE 2026)

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

TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

LIST OF ACRONYMS

2G	Second Generation
3G	Third Generation
4G	Fourth Generation
5G	Fifth Generation
ASPs	Application Service Providers
CA	Communications Authority of Kenya
Dare 1	Djibouti Africa Regional Express 1
DDOS	Distributed Denial of Service
DoS	Denial-of-Service
DSL	Digital Subscriber Line
DTH	Direct-To-Home
DTT	Digital Terrestrial Television
EAC	East African Community
EASSy	Eastern Africa Submarine Cable Systems
FM	Frequency Modulation
FTTH	Fibre-To-The-Home
FTTO	Fibre-To-The-Office
FY	Financial Year
GB	Gigabyte
Gbps	Gigabits per second
ICTs	Information and Communication Technologies
JTL	Jamii Telecommunications Limited
Kbps	Kilobits per second
KE-CIRT/CC	National Kenya Computer Incident Response Team/Coordination Centre
LION 2	Lower Indian Ocean Network 2
LTE	Long Term Evolution
MB	Megabytes
Mbps	Megabits per second
MNOs	Mobile Network Operators
MoU	Minutes of Use
MVNO	Mobile Virtual Network Operator
NCC	National Cybersecurity Centre
OTT	Over-The-Top media services
PCK	Postal Corporation of Kenya
PEACE	Pakistan and East Africa Connecting Europe
PLC	Public Limited Company

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

PRELIMINARY NOTES

This report is based on data provided by licensees of 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 handbook available on 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 present updates on the uptake 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 collected from end users) as this information is collected through National Surveys and reported separately as per ITU standards available on 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 demand side data.

SUMMARY OF ICT INDICATORS

The Fourth Quarter Sector Statistics Report for the 2025/26 Financial Year highlights the performance of the sector for the period 1st April to 30th June 2026 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	*Apr-Jun 26*	*Jan-Mar 26*	*Quarterly Variation (%)*
MOBILE NETWORK SERVICES			
Subscriptions to Mobile Services			
Total Mobile (SIM) Subscriptions	87,999,998	84,090,298	4.6
Machine-to-Machine (M2M) Subscriptions	2,220,450	2,000,360	11.0
Mobile Money Transfer Services			
Number of Registered Mobile Money Agents	568,463	602,470	-5.6
Mobile Money Subscriptions	54,005,800	53,368,939	1.2
Mobile Data and Broadband Subscriptions			
Mobile Data Subscriptions	64,263,694	62,634,225	2.6
Mobile Broadband Subscriptions	54,925,257	52,852,505	3.9
Mobile Phones Devices			
Feature Phones	27,420,856	28,534,230	-3.9
Smartphones	52,262,565	50,175,502	4.2
Domestic Mobile Traffic			
Mobile Voice Traffic (Minutes)			
On-Net Voice Traffic	27,711,297,079	27,094,796,078	2.3
Off-Net Voice Traffic	5,300,102,352	5,218,018,753	1.6
Mobile to Fixed Network	6,031,639	4,641,364	30.0
Mobile SMS Traffic			
SMS On-Net	12,695,766,403	12,715,180,956	-0.2
SMS Off-Net	1,420,877,165	1,268,328,571	12.0
International Mobile Traffic			
Mobile Voice Traffic (Minutes)			
International Incoming Mobile Voice Traffic	188,409,673	176,432,634	6.8
International Outgoing Mobile Voice Traffic	198,748,110	192,804,756	3.1
Mobile SMS Traffic			
International Incoming SMS	6,243,085	5,146,818	21.3
International Outgoing SMS	2,033,216	2,159,121	-5.8
Roaming Traffic			
Out-bound Roaming Traffic			
Out-bound Roaming Incoming Voice Traffic (Minutes)	170,977,812	162,631,474	5.1
Out-bound Roaming Outgoing Voice Traffic (Minutes)	5,228,366	6,134,071	-14.8
Out-bound Roaming Incoming SMS	101,881,822	105,200,686	-3.2
Out-bound Roaming Outgoing SMS	3,530,381	3,381,611	4.4
Data Volumes (MB)	136,389,846	112,911,735	20.8
In-bound Roaming Traffic			
In-bound Roaming Incoming Voice Traffic (Minutes)	199,182,056	190,910,315	4.3
In-bound Roaming Outgoing Voice Traffic (Minutes)	3,768,225	4,380,313	-14.0
In-bound Roaming Incoming SMS	68,447,733	62,731,345	9.1
In-bound Roaming Outgoing SMS	1,689,754	1,689,420	0.0
Data Volumes (MB)	763,332,892	828,323,742	-7.8
FIXED NETWORK SERVICES			
Fixed Voice Subscriptions			
Fixed Line Subscriptions	6,085	6,092	-0.1
Fixed Wireless Subscriptions	1,669	1,665	0.2
Fixed VoIP Subscriptions	55,240	47,884	15.4
Domestic Fixed Voice Traffic			
Fixed line-Fixed line	59,309	78,596	-24.5
Fixed Wireless-Fixed Wireless	355,012	349,543	1.6

Indicator/Period	*Apr-Jun 26*	*Jan-Mar 26*	*Quarterly Variation (%)*
Fixed to Mobile	592,711	952,659	-37.8
International Fixed Voice Traffic			
Incoming Fixed Voice Traffic	4,854,123	4,696,787	3.3
Outgoing Fixed Voice Traffic	1,185,253	1,429,985	-17.1
Outgoing Fixed VOIP	681,000	495,302	37.5
Fixed Data and Broadband Services			
Fixed Data/internet subscriptions	2,838,656	2,656,653	6.9
Total Available International Bandwidth (Gbps)	28,950.332	29,050.332	-0.3
Total Used International Bandwidth (Gbps)	19,432.074	18,678.824	4.0
POSTAL AND COURIER SERVICES			
Postal Traffic			
Domestic Letters	146,935	144,316	1.8
International Outgoing Letters	13,056	15,193	-14.1
International Incoming Letters	19,601	20,084	-2.4
Domestic Parcels	667,978	102,890	549.2
International Outgoing Parcels	8,450	6,584	28.3
International Incoming Parcels	12,581	21,905	-42.6
Courier Traffic			
Domestic Letters	912,480	636,566	43.3
International Outgoing Letters	14,320	14,079	1.7
International Incoming Letters	35,764	27,676	29.2
Domestic Parcels	3,371,364	3,683,993	-8.5
International Outgoing Parcels	19,275	17,221	11.9
International Incoming Parcels	244,545	190,097	28.6
BROADCASTING SERVICES			
DTT Subscriptions	874,777	897,900	-2.6
DTH Subscriptions	643,947	645,763	-0.3
Cable Subscriptions	30,240	33,676	-10.2
FREQUENCY SPECTRUM MANAGEMENT			
Microwave links Deployed	10,554	10,508	0.4
FM Sound Broadcasting Frequencies Assigned	978	976	0.2
ELECTRONIC TRANSACTIONS AND CYBERSPACE MANAGEMENT			
.KE Domain	129,140	124,498	3.7
Total Cyber Threats Detected	2,355,938,192	3,367,113,840	-30.0
Total Cyber Threat Advisories	20,748,489	20,581,754	0.8
POPULATION			
Total Population in Kenya (Millions)*	53,330,978	53,330,978	0.0

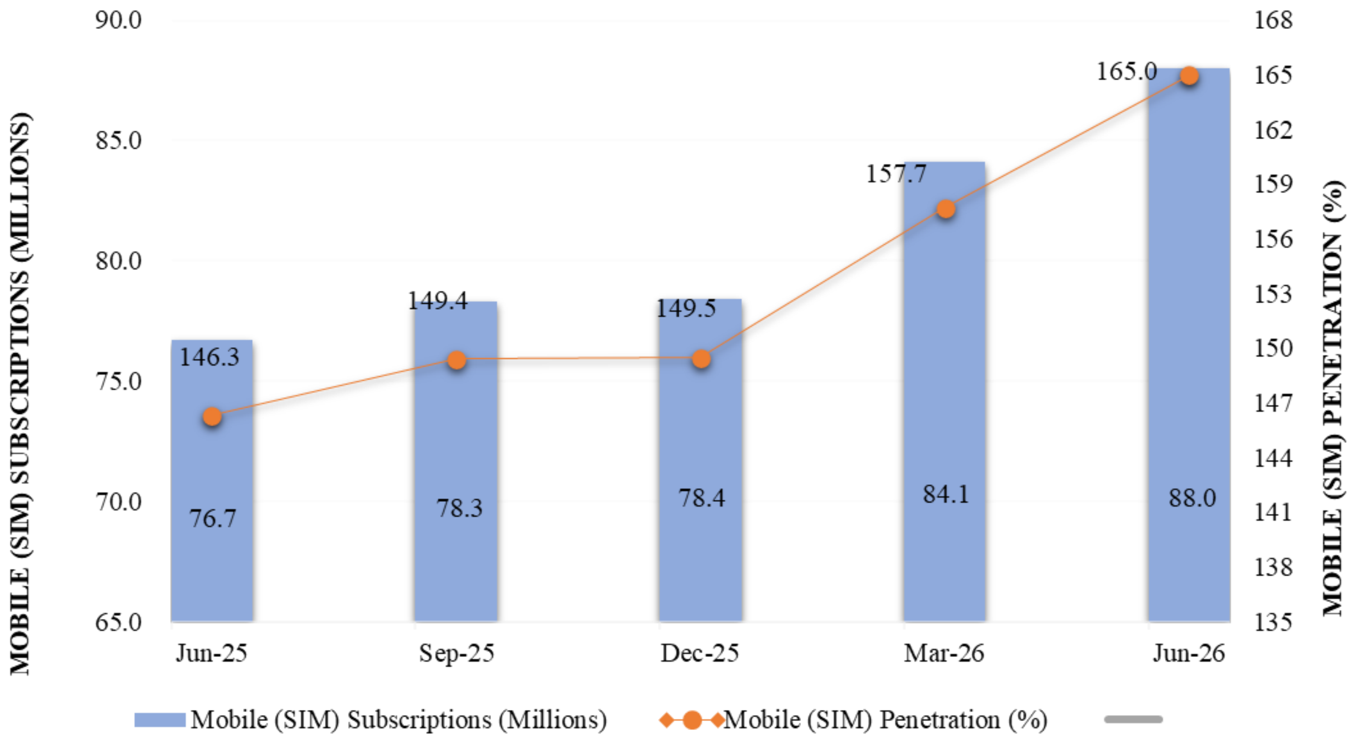
**Economic Survey 2026*

1. MOBILE NETWORK SERVICES

1.1 Mobile Subscriptions (SIM Cards)

During the 2025/26 Financial Year, the telecommunications sub-sector demonstrated continued growth with active mobile subscriptions growing to reach 88.0 million as of 30th June 2026 marking 4.6 per cent growth from June 2025. This translated to a mobile penetration rate of 165.0 per cent compared to 146.3 per cent recorded in June 2025. This growth is attributed to the various customer win-back campaigns run by mobile network operators during the reference period.

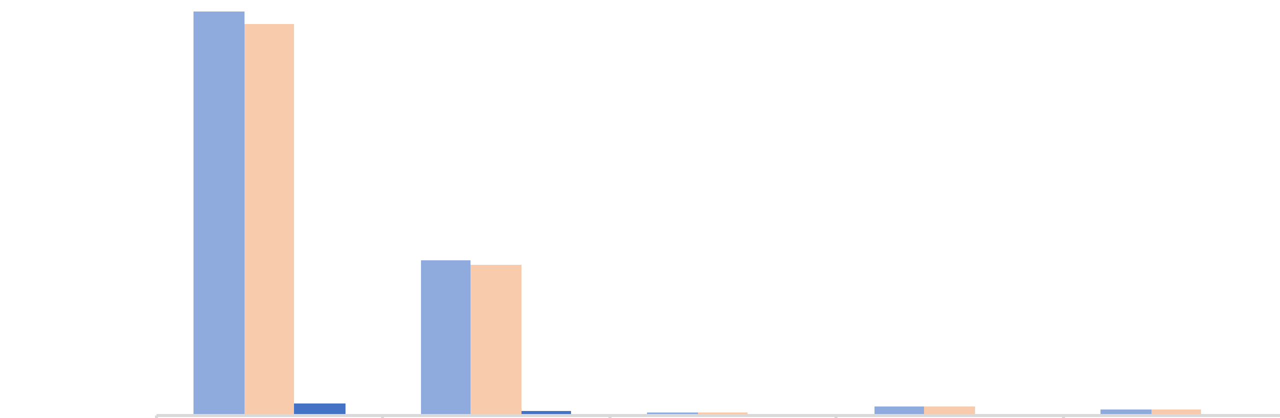
Figure 1 illustrates the trends in mobile subscriptions and the respective penetration rates.



Source: CA, Operators' Returns

Figure 1: Mobile Subscriptions and Penetration

The number of active mobile subscriptions per operator by contract type is as shown in Figure 2. The ratio of pre-paid to postpaid mobile subscriptions was 97.1 to 2.9.



	Safaricom	Airtel	Telkom	Equitel	JTL
Total	61,447,008	23,600,969	545,765	1,468,616	937,640
Prepaid	59,642,646	22,829,593	535,488	1,468,616	937,640
Postpaid	1,804,362	771,376	10,277		

Source: CA, Operators' Returns

Figure 2: Mobile Subscription per Operator

1.2 Machine-to-Machine (M2M) Subscriptions

Machine-to-Machine (M2M) subscriptions increased by 24.1 per cent to 2.22 million as at the end of review period as shown in Table 1. This growth reflects the increasing uptake of machine-enabled connectivity and Internet of Things (IoT) applications.

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

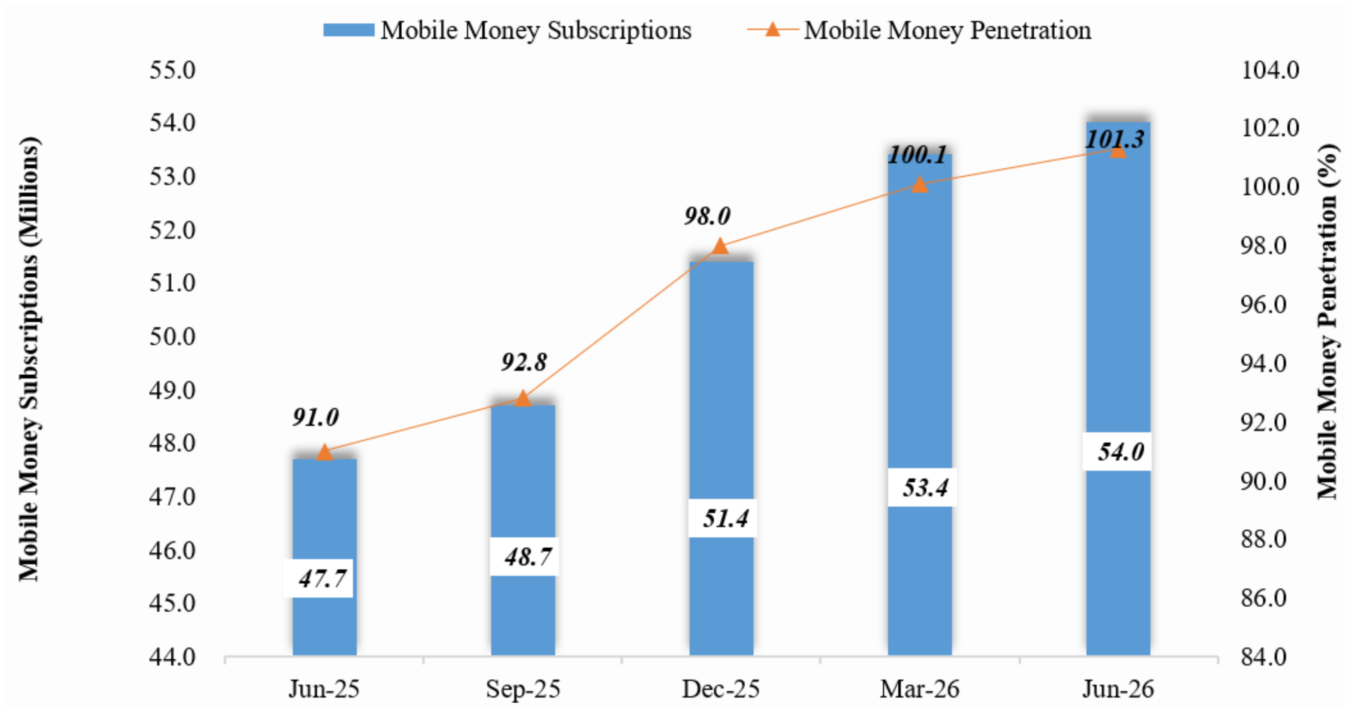
Indicator/Period	***Jun-26***	***Mar-26***	***Quarterly Variation (%)***	***Jun-25***	***Annual Variation (%)***
Machine to Machine (M2M)	2,220,450	2,000,360	11.0	1,789,785	24.1

Source: CA, Operators', Returns

1.3 Mobile Money Services

Mobile money subscriptions grew by 13.2 per cent during the year to reach 54.0 million as of 30th June 2026 translating to a penetration rate of 101.3 per cent as shown in Figure 3.

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

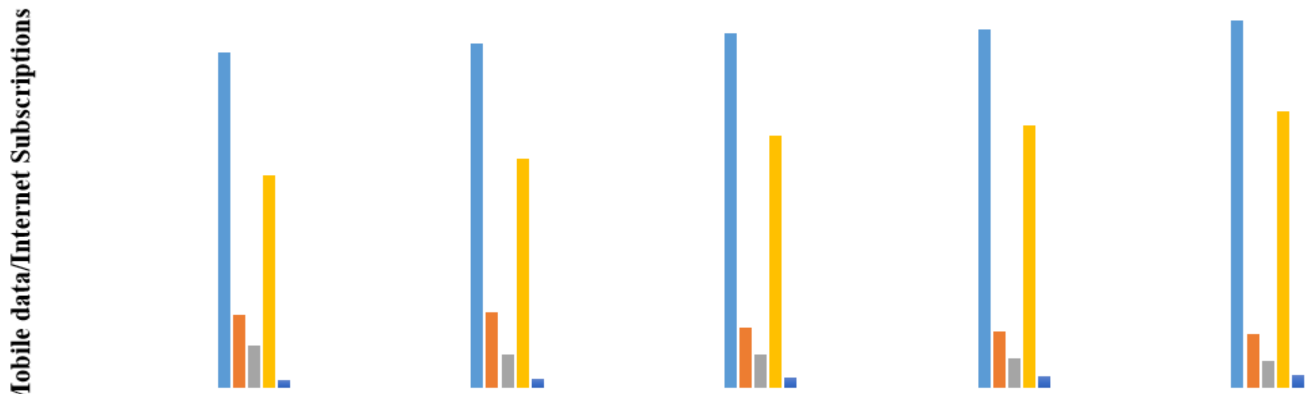


Source: CA, Operators' Returns,

Figure 3:Mobile Money Services

The Internet remained a key enabler of digital transformation, providing opportunities for economic participation and delivery of public and private sector services. During the review period, mobile data continued to dominate the data/internet market, with total subscriptions reaching 64.3 million as of 30th June 2026 representing a year-on-year growth of 9.7 per cent from 58.6 million subscriptions reported in June 2025. Mobile broadband subscriptions accounted for 85.5 per cent of the total subscriptions with 4G being the most adopted broadband technology as illustrated in Figure 4.

1.4 Mobile Data and Broadband[1] Services

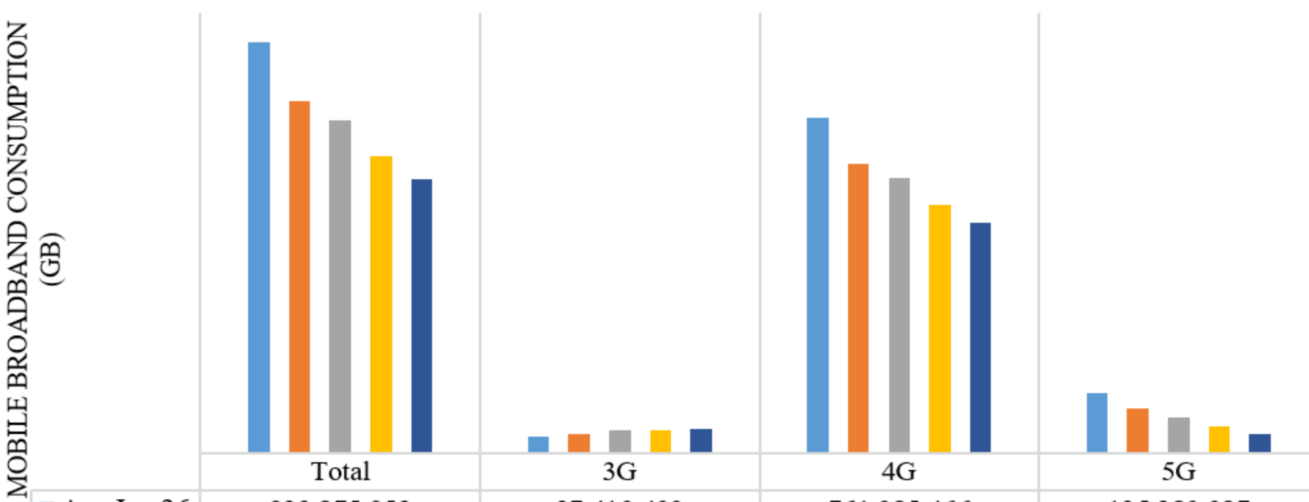


	Jun-25	Sep-25	Dec-25	Mar-26	Jun-26
Total	58,575,082	60,269,091	61,994,599	62,634,225	64,263,694
2G	12,784,092	13,102,535	10,444,616	9,781,720	9,338,437
3G	7,363,831	5,686,498	5,656,599	5,002,220	4,509,901
4G	37,179,446	39,983,259	44,158,342	45,944,587	48,312,139
5G	1,247,713	1,496,799	1,735,042	1,905,698	2,103,217

Source: CA, Operators' Returns

Figure 4: Mobile Data Subscriptions

Mobile data consumption (GB) across 4G and 5G networks maintained an upward trend during the period under review while 3G data consumption continued to decline as subscribers increasingly preferred high-speed mobile broadband services as shown in Figure 5.



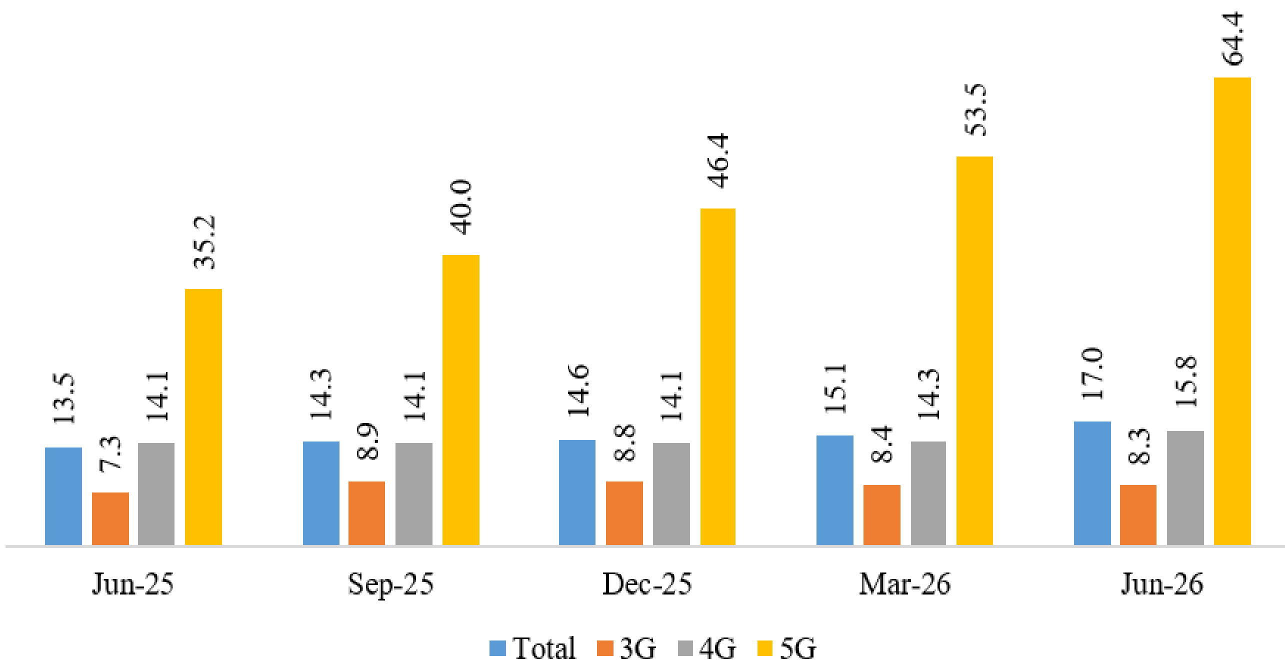
	Total	3G	4G	5G
Apr-Jun 26	933,875,953	37,410,400	761,085,466	135,380,087
Jan-Mar 26	800,027,716	41,961,118	656,052,570	102,014,028
Oct-Dec 25	755,095,103	49,768,422	624,799,882	80,526,799
Jul-Sep 25	674,240,311	50,857,209	563,537,816	59,845,286
Apr-Jun 25	620,189,223	53,758,937	522,564,678	43,865,608

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

Source: CA, Operators' Returns,

Figure 5: Mobile Broadband Consumption

The average mobile broadband consumption in Gigabytes per broadband subscription has maintained an upward trend apart from 3G technology as shown in Figure 6.

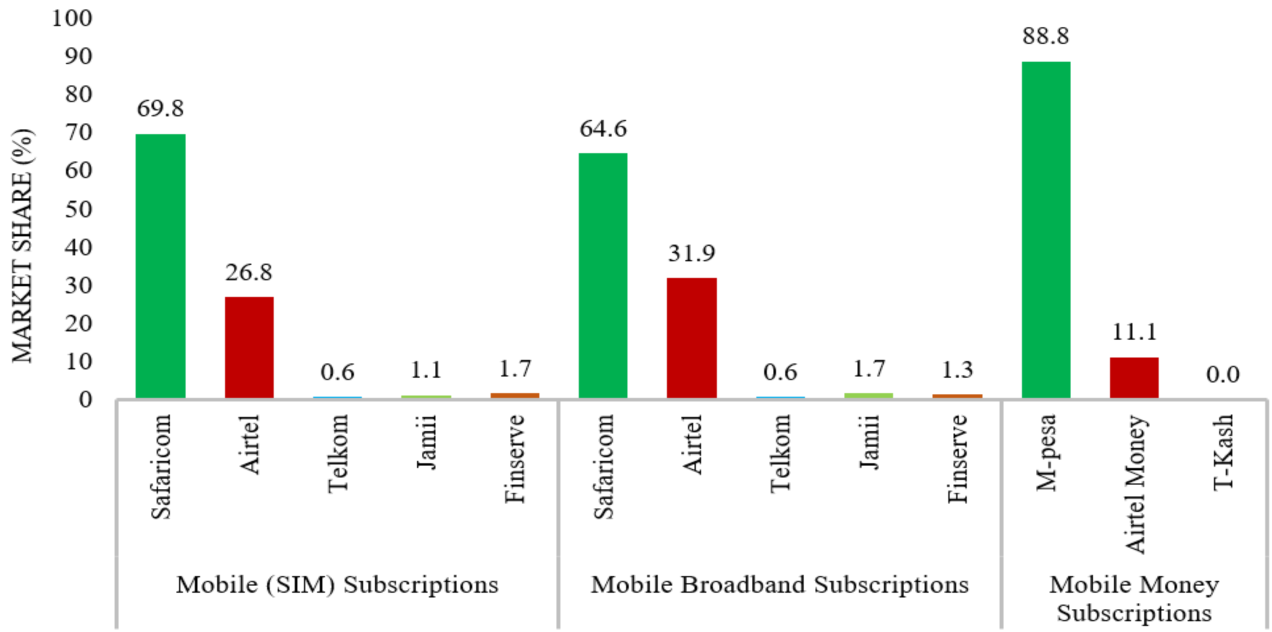


Source: CA, Operators' Returns,

Figure 6: Mobile Consumption per subscription

1.5 Market Shares in Subscriptions for Mobile Services

As at the end of June 2026, Safaricom PLC recorded the highest market shares in mobile subscriptions (69.8%), mobile broadband subscriptions (64.4%) and mobile money transfer (88.8%). On the other hand, Telkom Kenya recorded the least market shares across the three service categories as shown in Figure 7.

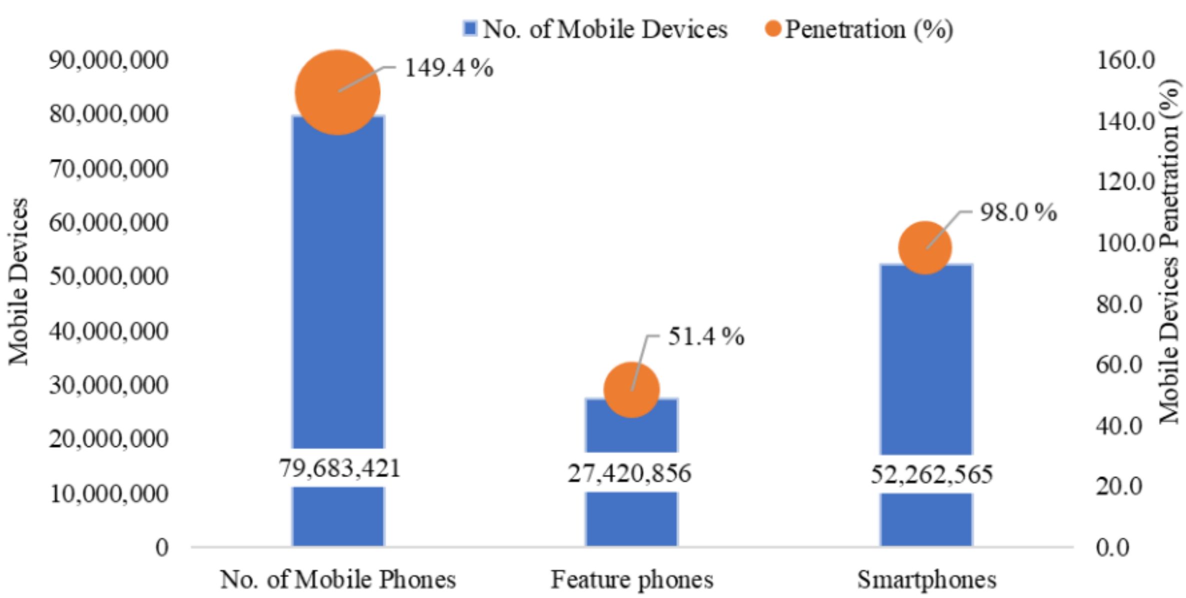


Source: CA, Operators' Returns

Figure 7: Mobile Market Shares

1.6 Mobile Phone Devices

The total mobile devices connected to mobile networks by the end of June 2026 stood at 79.7 million, translating to a penetration rate of 149.4 per cent. The uptake of smartphones has continued to grow driven by increased expansion of 4G and 5G networks while that of feature phones continued to decline as shown in Figure 8.



Source: CA, Operators' Returns

Figure 8: Mobile Phone Devices

1.7 Domestic Mobile Voice and SMS Traffic

Total domestic voice traffic increased by 13.6 per cent to 126.7 billion minutes during the year under review, from 111.6 billion minutes recorded last financial year. Similarly, SMS traffic declined by 0.3 per cent to 57.1 billion messages as shown in Table 2. The decline in SMS is mainly attributed to increased uptake of over-the-top messaging services such as WhatsApp.

Table 2:Domestic Mobile Traffic per Operator

Name of Operator /Indicator			***Safaricom PLC***	***Airtel Networks Kenya Ltd***	***TKL***	***Finserve***	***JTL***	***Total***
Apr-Jun 26	***Voice***	***Total***	**21,433,684,010**	**11,532,449,477**	**16,451,109**	**15,112,542**	**13,702,293**	**33,011,399,431**
		On-net	19,839,642,299	7,863,857,180	5,773,894	999,656	1,024,050	27,711,297,079
		Off-net	1,594,041,711	3,668,592,297	10,677,215	14,112,886	12,678,243	5,300,102,352
	SMS	***Total***	**13,138,514,858**	**974,994,962**	**968,283**	**1,642,689**	**522,776**	**14,116,643,568**
		On-net	12,237,599,854	457,659,310	57,141	379,276	70,822	12,695,766,403
		Off-net	900,915,004	517,335,652	911,142	1,263,413	451,954	1,420,877,165
Jan-Mar 26	***Voice***	***Total***	**20,989,957,949**	**11,269,991,704**	**21,708,526**	**17,372,510**	**13,784,142**	**32,312,814,831**
		On-net	19,421,540,873	7,661,624,635	9,463,285	1,098,395	1,068,890	27,094,796,078
		Off-net	1,568,417,076	3,608,367,069	12,245,241	16,274,115	12,715,252	5,218,018,753
	SMS	***Total***	**13,139,302,189**	**840,239,259**	**1,467,941**	**2,006,146**	**493,992**	**13,983,509,527**
		On-net	12,238,195,036	476,317,416	107,576	502,194	58,734	12,715,180,956
		Off-net	901,107,153	363,921,843	1,360,365	1,503,952	435,258	1,268,328,571
FY 202526	***Voice***	***Total***	**80,333,662,804**	**46,186,139,489**	**103,384,831**	**62,247,801**	**56,753,754**	**126,742,188,679**
		On net	74,139,559,782	31,855,674,876	47,029,472	4,177,519	4,042,951	106,050,484,600
		Off-net	6,194,103,022	14,330,464,613	56,355,359	58,070,282	52,710,803	20,691,704,079
	SMS	***Total***	**52,789,387,159**	**4,325,097,045**	**9,591,075**	**8,519,512**	**2,040,292**	**57,134,635,083**
		On-net	49,179,337,646	2,256,444,298	360,643	3,022,729	263,199	51,439,428,515
		Off-net	3,610,049,513	2,068,652,747	9,230,432	5,496,783	1,777,093	5,695,206,568
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

Source: CA, Operators' Returns

1.8 Minutes of Use per Call per Operator

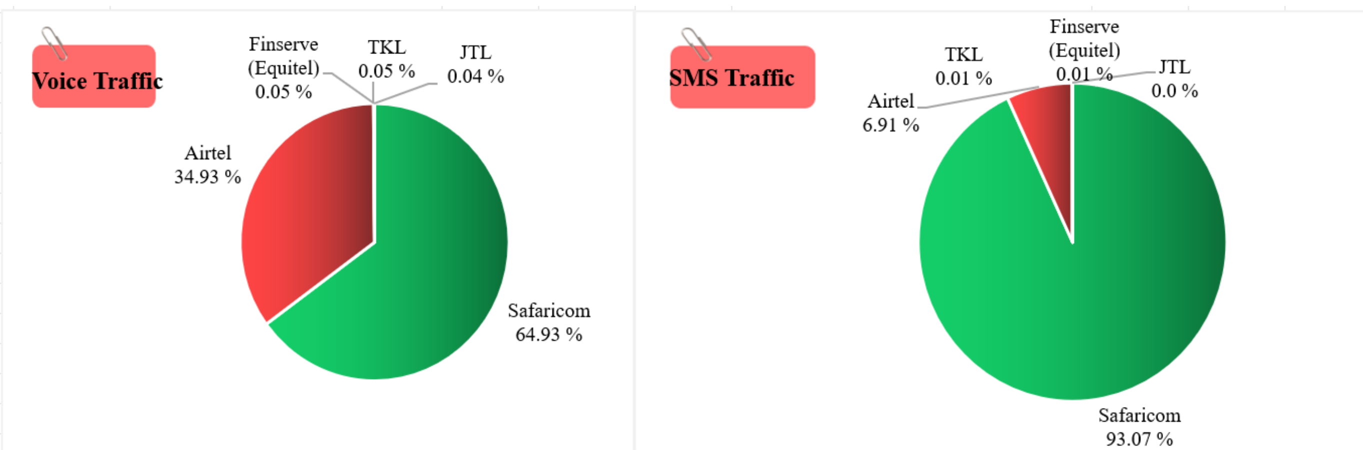
During the fourth quarter of 2025/26 FY, the average on-net and off-net call durations were recorded at 1.8 and 1.3 minutes respectively. Telkom Kenya customers recorded the longest on-net calls at 3.9 minutes, while Jamii Telecom registered the highest off-net calls at 1.6 minutes. Table 3 shows the average minutes of use per call by operator.

Table 3: MoU per Call

Period	*Apr-Jun 26*		*Jan-Mar 26*		*Apr-Jun 25*	
Operator/Indicator	**On-net**	**Off-net**	**On-net**	**Off-net**	**On-net**	**Off-net**
Total Average	**1.8**	**1.3**	**1.8**	**1.3**	**1.9**	**1.3**
Safaricom PLC	1.6	1.1	1.6	1.2	1.6	1.1
Airtel Networks Limited	2.8	1.4	2.7	1.4	3.1	1.5
Telkom Kenya Limited	3.9	1.3	2.8	1.2	2.7	1.2
Finserve (Equitel)	2.2	1.2	1.4	1.2	1.4	1.2
Jamii Telecommunications Ltd	1.4	1.6	1.4	1.6	1.4	1.7

Source: CA, Operators' Returns,

1.9 Market shares in Domestic Mobile Voice and SMS Traffic

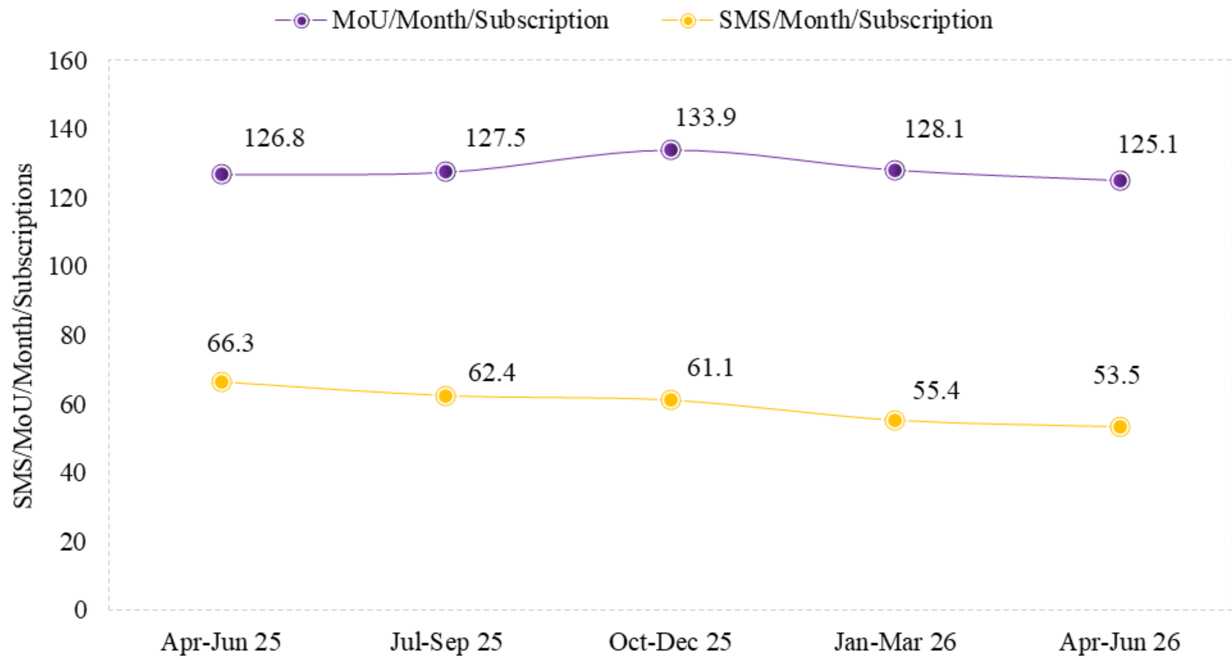


Source: CA, Operators' Returns

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 declined to 125.1 during the review period from 128.1 minutes recorded last quarter. Similarly, the average number of short messages services per subscription dropped to 53.5 from 55.4 messages as shown in Figure 10.



Source: CA, Operators' Returns

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

1.11 International Mobile Traffic

Incoming international mobile voice minutes grew by 6.8 per cent to 188.4 million. On the other hand, the outgoing international mobile voice traffic declined from 192.8 million to 160.3 million. International incoming and outgoing mobile voice traffic recorded year-on-year growth rates of 15.9 and 8.8 per cent respectively. International incoming and outgoing mobile SMS dropped by 19.4 per cent and 25.4 per cent respectively as shown in Table 4.

Table 4: International Mobile Traffic

Indicator/Period	*Region*	*Apr-Jun 26*	*Jan-Mar 26*	*Quarterly Variation (%)*	*FY 2025/26*	*FY 2024/25*	*Annual Variation (%)*
International Incoming Mobile Voice Minutes	*EAC*	125,252,985	116,239,264	7.8	475,030,534	439,434,760	8.1
	Others	63,156,688	60,193,370	4.9	228,675,134	167,782,370	36.3
	Total	**188,409,673**	**176,432,634**	**6.8**	**703,705,668**	**607,217,130**	**15.9**
International Outgoing Mobile Voice Minutes	*EAC*	160,251,834	151,894,488	5.5	622,775,915	546,280,447	14.0
	Others	38,496,276	40,910,268	-5.9	174,632,301	186,356,818	-6.3
	Total	**160,251,834**	**192,804,756**	**-16.9**	**797,408,216**	**732,637,265**	**8.8**
International Incoming Mobile SMS		6,243,085	5,146,818	21.3	22,441,398	27,835,607	-19.4
International Outgoing Mobile SMS		2,033,216	2,159,121	-5.8	9,289,759	12,458,851	-25.4

Source: CA, Operators' Returns

1.12 Roaming Traffic

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

Table 5: Outbound Roaming Traffic

Country / Indicator	*Incoming Voice (Minutes)*	*Incoming SMS*	*Outgoing Voice (Minutes)*	*Outgoing SMS*	*Data Volumes (MB)*
Uganda	137,905,513	3,861	2,163,165	827,905	57,236,401
Tanzania	20,751,644	13,773,074	577,747	462,775	23,024,447
Rwanda	3,202,620	-	180,797	69,159	6,465,719
Burundi	111,077	2,057,441	282	6,071	14,923
South Sudan	8,088,869	-	427,346	171,858	1,757,914
Democratic Republic of Congo	4,147	177,806	4,466	18,520	2,955,177
EAC Total	170,063,870	16,012,182	3,353,803	1,556,288	91,454,581
Others	913,942	85,869,640	1,874,563	1,974,093	44,935,265
Total	170,977,812	101,881,822	5,228,366	3,530,381	136,389,846

Table 6: In-bound Roaming Traffic

Country / Indicator	*Incoming Voice (Minutes)*	*Incoming SMS*	*Outgoing Voice (Minutes)*	*Outgoing SMS*	*Data Volumes (MB)*
Uganda	28,707,105	6,776,736	1,588,090	108,329	29,413,998
Tanzania	137,057,360	23,524,286	739,234	203,730	4,561,330
Rwanda	31,856,322	2,852,467	169,074	36,059	957,364
Burundi	1	1,565	606	6,953	40
South Sudan	866,009	2,421,992	109,811	10,290	200,749
Democratic Republic of Congo	5,257	212,241	58,681	6,015	596,560
EAC Total	198,492,054	35,789,287	2,665,496	371,376	35,730,041
Others	690,002	32,658,446	1,102,729	1,318,378	727,602,851
Total	199,182,056	68,447,733	3,768,225	1,689,754	763,332,892

Source: CA, Operators' Returns

1.13 Tariffs, Promotions and Special Offers

Table 7 shows the number of approved tariffs, promotions and special offers applications by MNOs for the five quarters, categorized by service type.

Table 7:Distribution of Tariffs, Promotions and Special Offer

Indicator	*No. of Tariffs*					*No. of Promotions*				
	Voice	*SMS*	*Data*	*Bundle*	*Other*	*Voice*	*SMS*	*Data*	*Bundle*	*Other*
Apr-Jun 26	0	0	6	3	4	1	0	0	0	0
Jan-Mar 26	1	0	7	2	0	1	0	1	0	0
Oct-Dec 25	1	1	10	4	1	2	0	2	1	0
Jul-Sept 25	2	1	13	3	0	0	0	4	3	0
Apr-Jun 25	2	2	1	7	2	1	0	2	6	0

Source: CA, tariffs, promotions and special offers

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 8.

Table 8: Average Pay-As-You-Go (PAYG) Tariffs

Operator/Market		***Average Voice (KES/Min)***	***SMS (KES/SMS)***	***Data (KES/MB)***
Safaricom PLC	Peak	4.87	1.20	4.87
	Off Peak	2.50	1.20	4.87
Airtel Network Limited		2.93	1.20	4.50
Telkom Kenya Limited	On net	2.73	1.15	4.50
	Off net	4.30	1.15	4.50
Average		3.47	1.18	4.65

Source: CA

1.15 Mobile Service Revenue

As shown in Figure 11, revenue from mobile services rose by 3.6 per cent to record KSh. 440.9 billion in 2025.

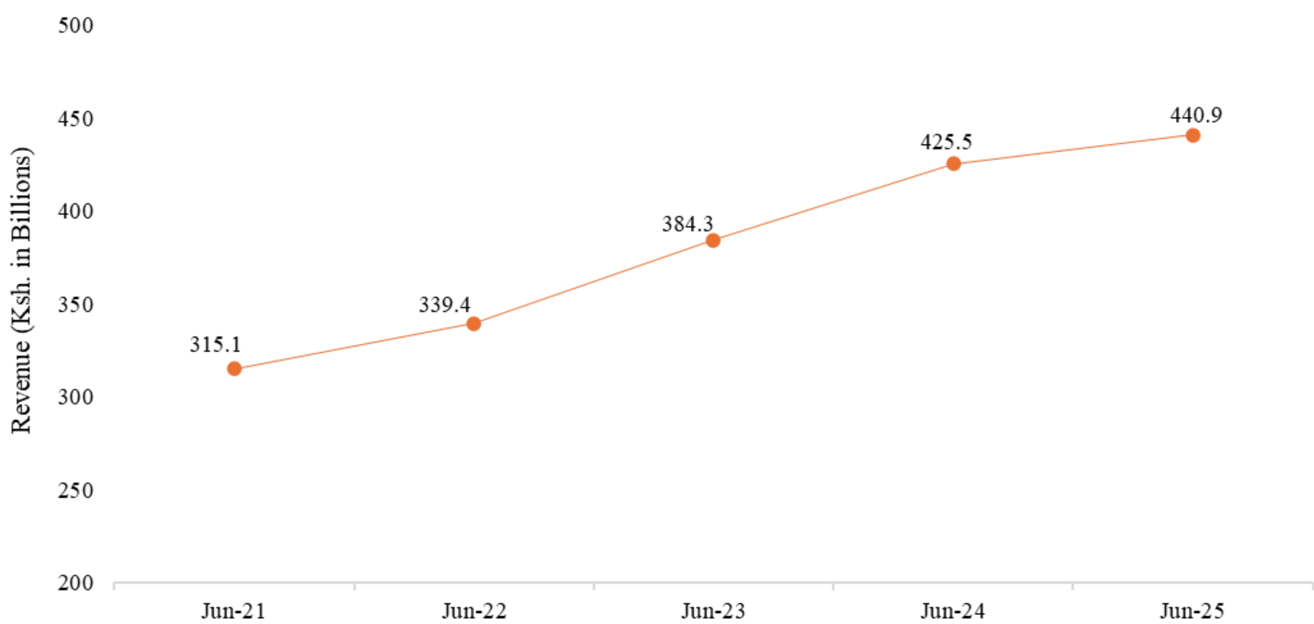
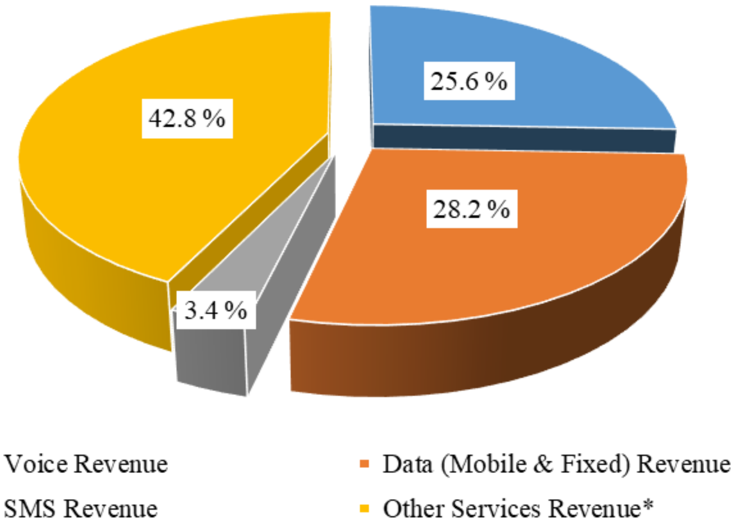


Figure 11:Mobile Service Revenue

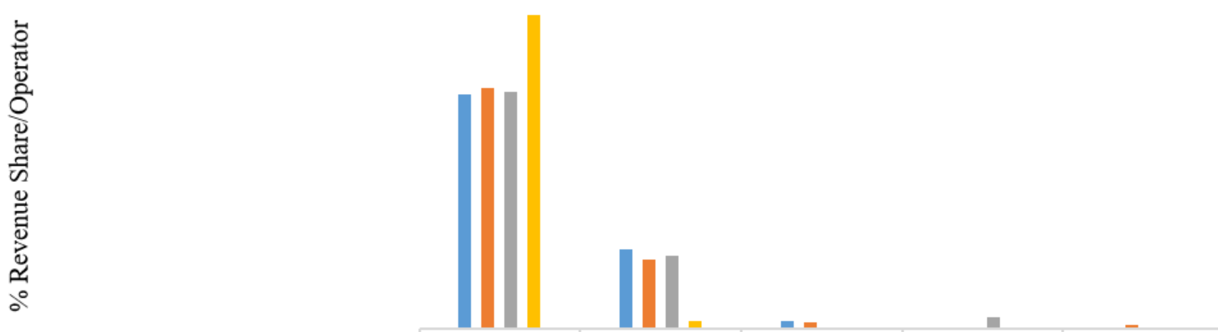
Figure 12 shows the revenue shares for the respective mobile services. Other service revenue, which includes roaming, bulk SMS, airtime by credit and mobile money constituted the greatest share of 2025 mobile service revenues at 42.8 per cent.



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

Figure 12: % Revenue per Service

Figure 13 shows the percentage shares in revenue based on services per operator.



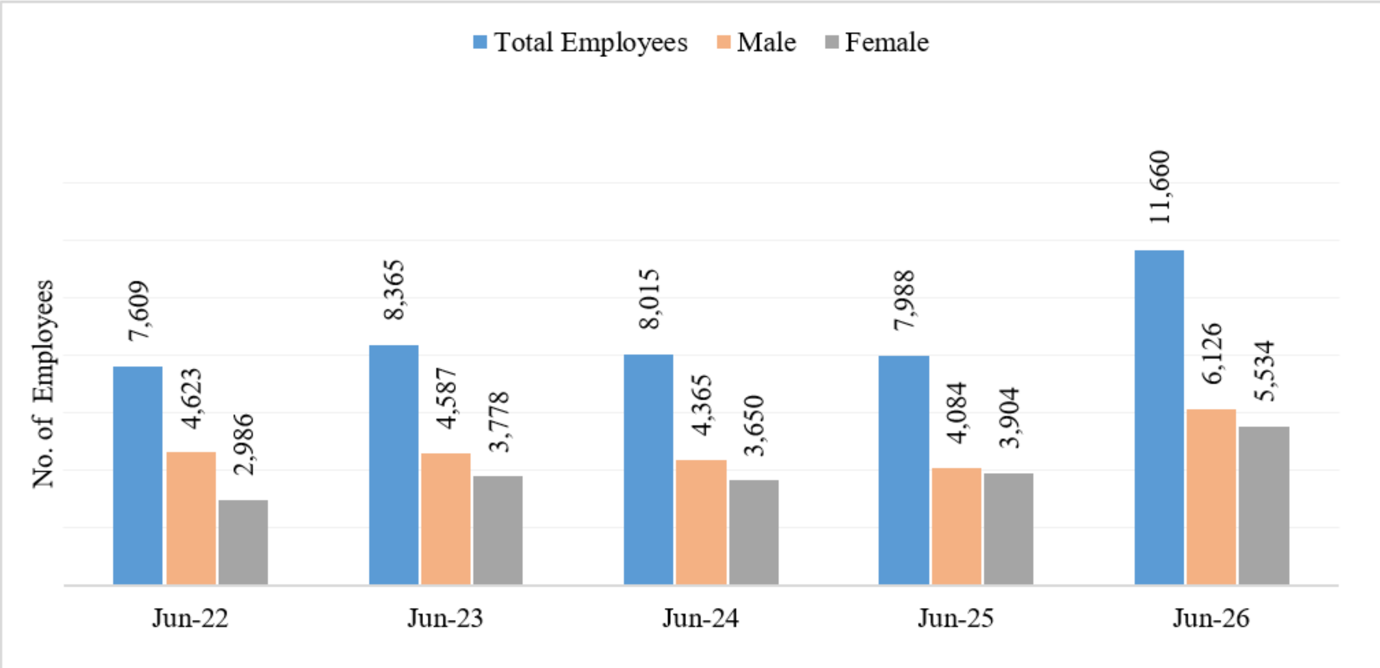
	Safaricom PLC	Airtel Networks	Telkom Kenya	Finserve Ltd	Jamii Telecommunications
Voice Revenue	72.5	24.6	2.7	0.2	0.0
Data (Mobile & Fixed) Revenue	74.4	21.5	2.4	0.1	1.6
SMS Revenue	73.4	22.9	0.0	3.7	0.0
Other Services Revenue*	96.8	2.5	0.7	0.0	0.0

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

Figure 13: % Shares in Revenue by Operator

1.16 Employment in the Mobile Sub-Sector

As of 30th June 2026, the number of persons employed by MNOs stood at 11,660 up from 7,988 reported in the previous year with male to female ratio of 56:44. The five-year trend in employment within the mobile sub-sector is presented in Figure 14.



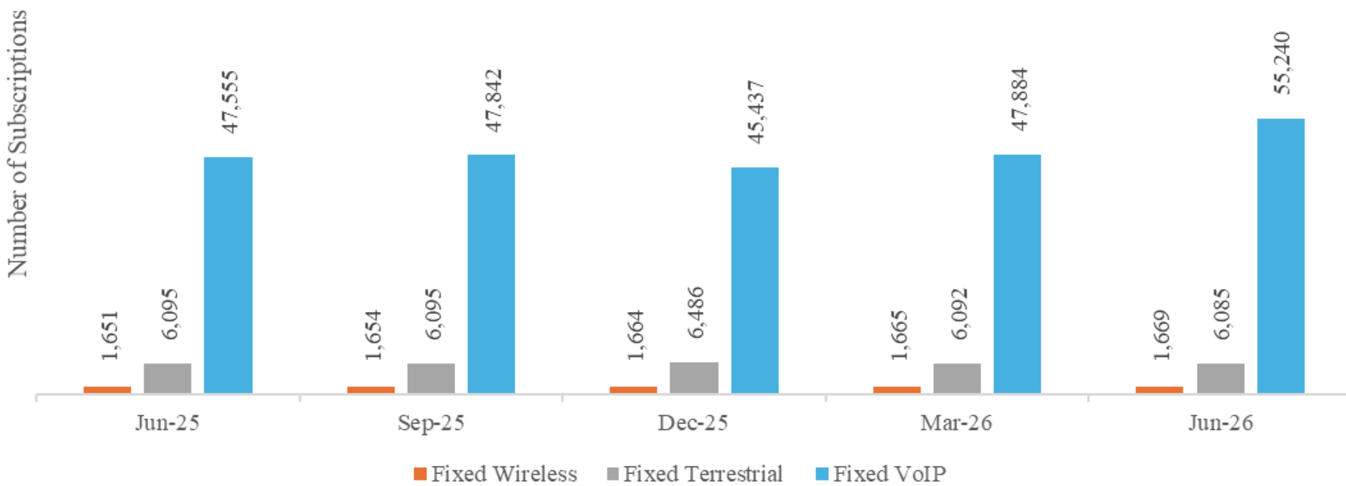
Source: CA, Operators' Returns

Figure 14: Employment in Mobile Sub-Sector

2. FIXED NETWORK SERVICES

2.1 Fixed Telephone Subscriptions

Traditional fixed voice services in the country are experiencing a terminal structural decline, rapidly losing relevance as consumers and corporate entities migrate to mobile networks and internet-based communication platforms. During the year, managed fixed Voice over IP and fixed wireless subscriptions increased to 55,240 and 1,669 respectively as shown in Figure 15.



Source: CA, Operators' Returns

Figure 15: Fixed Voice Subscriptions

2.2 Domestic Fixed Voice Traffic

Total domestic fixed voice traffic declined by 27.1 per cent, from 1.38 million minutes recorded in the previous quarter to 1.01 million minutes in the fourth quarter. The year-on-year decline was more significant at 89.4 per cent, posting 4.5 million minutes, from 42.9 million posted last financial year as shown in Table 9. This decline is directly correlated to the drop in fixed line and fixed wireless subscriptions.

Table 9: Domestic Fixed Voice Traffic

Domestic Fixed Voice Traffic (Minutes)	*Apr-Jun 26*	*Jan-Mar 26*	*Quarterly Variation (%)*	*FY 2025/26*	*FY 2024/25*	*Annual Variation (%)*
Fixed-Fixed	59,309	78,596	-24.5	312,673	418,868	-25.4
Fixed Wireless-Fixed Wireless	355,012	349,543	1.6	1,368,122	1,175,344	16.4
Fixed-Mobile	592,711	952,659	-37.8	2,873,313	41,358,602	-93.1
Total Domestic Fixed Network Traffic	**1,007,032**	**1,380,798**	**-27.1**	**4,554,108**	**42,952,814**	**-89.4**

Source: CA, Operators' Returns

2.3 International Fixed Voice Traffic

International outgoing fixed line and fixed VoIP traffic increased by 18.4 and 4.5 per cent from last year to post 4.8 million and 2.2 million minutes respectively. In contrast, international incoming fixed network voice traffic declined by 7.0 per cent to 18.3 million minutes.

Table 10: International Fixed Voice Traffic

Indicator/Period	*Apr-Jun 26*	*Jan-Mar 26*	*Quarterly Variation (%)*	*FY 2025/26*	*FY 2024/25*	*Annual Variation (%)*
International Incoming Fixed Network Voice traffic	4,854,123	4,696,787	3.3	18,328,694	19,706,314	-7.0
International Outgoing Fixed Network Voice traffic	1,185,253	1,429,985	-17.1	4,768,895	4,026,246	18.4
International Outgoing Fixed VoIP traffic	681,000	495,302	37.5	2,222,586	2,125,922	4.5

Source: CA, Operators' Returns

2.4 Fixed Internet Subscriptions by Technology

Fixed internet services in the country are experiencing unprecedented growth, driven by intense competition, a shifting digital economy, and aggressive infrastructure roll-outs. As shown in Table 11, data/internet subscriptions grew by 6.9 per cent between quarter three and four, and by 32.4 per cent between June 25 and June 2026. Year-on-year, other data/internet subscriptions which mainly comprise of radio technology grew particularly high by 471.1 per cent mainly attributed to roll-out of radio technology by Airtel, Jamii Telecommunication and Fiberlink Ltd. Terrestrial wireless (42.9%), satellite (54.4%), fibre optic (29.7%) and cable modem (4.2%) recorded remarkable growth as well. However, DSL technology, which has been faced with structural collapse over the last decade, recorded a decline of 25.8 per cent in subscriptions as shown in Table 11.

Table 11: Fixed Internet Subscriptions by Technology

Indicator/Period	*Jun-26*	*Mar-26*	*Quarterly Variation (%)*	*Jun-25*	*Annual Variation (%)*
Terrestrial Wireless	1,030,770	950,317	8.5	721,167	42.9
Satellite	27,695	25,088	10.4	17,939	54.4
DSL (Copper)	23	31	-25.8	31	-25.8
Fibre Optic	1,566,815	1,474,201	6.3	1,207,583	29.7
Cable Modem	204,747	198,358	3.2	196,486	4.2
Other Fixed	8,606	8,658	-0.6	1,507	471.1
Total Subscriptions	**2,838,656**	**2,656,653**	**6.9**	**2,144,713**	**32.4**

Source: CA, Operators' Returns

2.5 Fixed Data and Broadband Subscriptions

Table 12 shows the number of fixed data/internet and broadband subscriptions by technology and speed.

Table 12: Fixed Data and Broadband Subscriptions

Internet Technology/Speeds		***<256Kbps***	***=>256Kbps < 2Mbps***	***=>2<10 Mbps***	***=>10<30 Mbps***	***=>30<100 Mbps***	***=>100 Mbps <1Gbps***	***=>1Gbps***
Jun 26	**Totals**	**40,381**	**113,438**	**1,087,316**	**946,369**	**385,913**	**263,386**	**1,853**
	Cable Modem	0	0	15,997	179,031	9,005	714	0
	Copper (DSL)	0	0	23	0	0	0	0
	FTTH	0	4,112	544,195	454,319	238,672	200,789	693
	FTTO	0	5,444	15,220	43,507	34,293	24,411	1,160
	Fixed Wireless	40,381	103,794	510,013	265,179	101,609	9,794	0
	Satellite	0	50	2	21	2	27,620	0
	Other Fixed	0	38	1,866	4,312	2,332	58	0
Mar 26	**Totals**	**38,950**	**96,553**	**863,147**	**1,073,140**	**334,471**	**249,342**	**1,050**
	Cable Modem	0	0	15,762	173,155	8,803	638	0
	Copper (DSL)	0	0	31	0	0	0	0
	FTTH	0	4,284	318,676	634,994	202,116	191,031	173
	FTTO	0	5,442	14,960	43,462	34,516	23,670	877
	Fixed Wireless	38,950	86,739	511,777	217,198	86,708	8,945	0
	Satellite	0	51	6	17	11	25,003	0
	Other Fixed	0	37	1,935	4,314	2,317	55	0
Jun 25	**Totals**	**35,114**	**49,790**	**717,853**	**873,903**	**282,562**	**184,790**	**701**
	Cable Modem	0	0	21,534	168,923	5,868	161	0
	Copper (DSL)	0	0	31	0	0	0	0
	FTTH	0	3,907	249,268	522,361	190,617	139,750	3
	FTTO	0	4,319	12,902	34,443	28,551	20,846	616
	Fixed Wireless	35,111	41,417	433,431	147,486	57,347	6,375	0
	Satellite	3	113	7	130	0	17,606	80
	Other Fixed	0	34	680	560	179	52	2

Source: CA, Operators' Returns

2.6 Top 10 Operators in Fixed Data/Internet Subscriptions

The top ten (10) fixed internet/data service providers by market share in the data sub-segment are presented in Table 13.

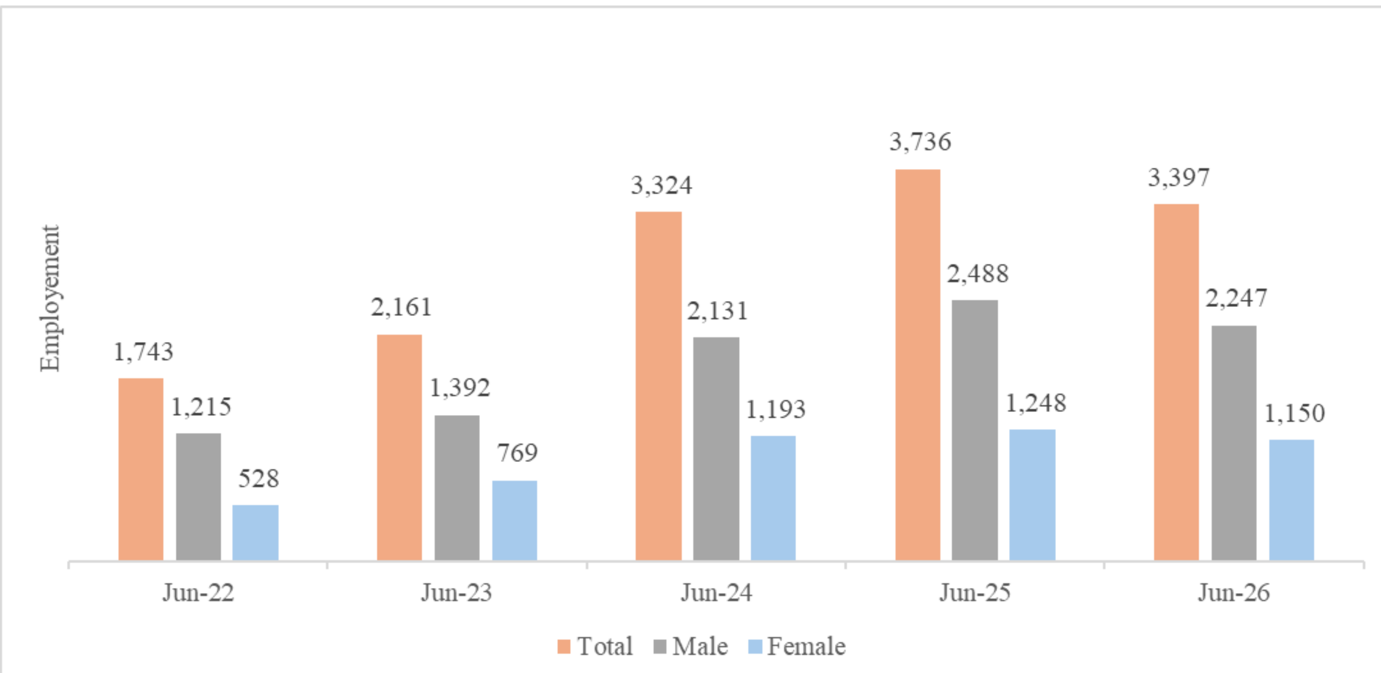
Table 13: Fixed Data Subscriptions by Operator

Service Provider/Indicator	***Data subscriptions***	***Market share (%)***
Safaricom PLC	1,024,950	36.1
Jamii Telecommunications Ltd	541,003	19.1
Wananchi Group (Kenya) Ltd*	294,375	10.4
Ahadi Wireless Ltd	270,586	9.5
Poa Internet Kenya Ltd	248,601	8.8
Vilcom Network Ltd	186,240	6.6
Mawingu Networks Ltd	105,275	3.7
Vijiji Connect Ltd	35,861	1.3
Starlink Internet Services Kenya	27,616	1.0
Dimension Data Solutions East Africa Ltd	23,280	0.8
Others	80,869	2.8

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

2.7 Employment in Fixed Internet Sub-Segment

Figure 16 shows the number of male and female employees in fixed internet sub-segment as at June 2026.



Source: CA, Operators' Returns

Figure 16: Employment in Fixed Internet Sub-Segment

2.8 International Internet Bandwidth

The average available international internet bandwidth decreased by 0.3 per cent in the fourth quarter but increased by 18.5 per cent year-on-year as shown in table 14. Satellite bandwidth capacity declined by 19.1 per cent to 0.360 Gbps in June 2026 from 0.445 Gbps in June 2025. This decline is mainly attributed to the growing migration from VSAT to LEO technology in the country. Similarly, utilized bandwidth capacity grew by 23.9 per cent although utilized satellite bandwidth declined by 18.2 per cent as shown in Table 15.

Table 14: International Internet Bandwidth (Gbps)

Indicator/ Period			*Apr-Jun 26*	*Jan-Mar 26*	*Quarterly Variation (%)*	*FY 2025/26*	*FY 2024/25*	*Annual Variation (%)*
Total Available (Lit/Equip) Bandwidth Capacity (Gbps)			**28,950.332**	**29,050.332**	**-0.3**	**26,428.360**	**22,311.445**	**18.5**
Undersea Bandwidth Capacity	**SEACOM**		9,950.000	10,500.000	-5.2	8,537.500	6,850.000	24.6
	TEAMS		4,063.000	4,063.000	0.0	4,063.000	4,063.000	0.0
	Telkom Kenya	**EASSY**	6,520.000	6,500.000	0.3	6,375.000	6,170.000	3.3
		Lion 2	1,119.000	1,119.000	0.0	1,037.000	810.000	28.0
		DARE 1	2,320.000	2,210.000	5.0	2,155.000	1,890.000	14.0
		PEACE	3,948.000	3,738.000	5.6	3,463.000	2,528.000	37.0
	Airtel Networks Kenya Ltd	**2 Africa**	1,030.000	920.000	12.0	797.500	-	-
Satellite Bandwidth Capacity			0.332	0.332	0.0	0.360	0.445	-19.1

Source: CA, Operators' Returns

Table 15: Total Utilized Bandwidth Capacity (Gbps)

Indicator/ Period	*Apr-Jun 26*		*Jan-Mar 26*		*Quarterly Δ (%)*	*FY 2025/26*		*FY 2024/25*		*Annual Δ (%)*
	Sold In Kenya	*Sold in other Countries*	*Sold In Kenya*	*Sold in other Countries*		*Sold In Kenya*	*Sold in other Countries*	*Sold In Kenya*	*Sold in other Countries*	
Total Utilized	**19,432.074**		**18,678.824**		**4.0**	**17,662.759**		**14,250.346**		**23.9**
Undersea Bandwidth Capacity	16,077.922	3,353.820	15,324.672	3,353.820	4.0	14,408.579	3,253.820	11,296.086	2,953.820	23.9
Satellite Internet Capacity	0.332		0.332		0.0	0.360		0.440		-18.2

Source: CA, Operators' Returns

3. POSTAL AND COURIER SERVICES

3.1 Designated Public Postal Operator (PCK) Traffic

The volume of domestic letters sent out by the Designated Postal Operator, the Postal Corporation of Kenya (PCK) increased by 1.8 per cent in the quarter but declined by 70.2 per cent year-on-year. International outgoing and incoming letters recorded mixed trends as shown in Table 16. Notably, domestic parcels increased significantly by 549.2 per cent during the quarter, mainly due to an increase in Express Mail Service items following the lifting of the embargo imposed in the previous quarter. The increase was further attributed to the growth in E-Commerce Service items following a partnership between PCK and a consolidation company for last-mile delivery. However, there was a general decline in parcels year-on-year.

Table 16: PCK Items

Indicator /Period		*Apr-Jun 26*	*Jan-Mar 26*	*Quarterly Variation (%)*	*FY 2025/26*	*FY 2024/25*	*Annual Variation (%)*
Letters	Domestic	146,935	144,316	1.8	577,694	1,940,804	-70.2
	International Outgoing	13,056	15,193	-14.1	68,696	47,134	45.7
	International Incoming	19,601	20,084	-2.4	92,680	974,930	-90.5
Parcels	Domestic	667,978	102,890	549.2	993,090	1,486,850	-33.2
	International Outgoing	8,450	6,584	28.3	43,245	148,529	-70.9
	International Incoming	12,581	21,905	-42.6	138,651	947,018	-85.4

Source: CA, Operators' Returns, parcels include volumes generated through e-commerce and express mail services

3.2 Private Courier Traffic

The volume of domestic letters handled by private courier operators increased by 43.3 per cent in the fourth quarter but declined by 2.5 per cent year-on-year. International outgoing and incoming letters recorded growth both in quarter four and in the reference year. Domestic parcels declined in the quarter recorded growth in the 2025/26 FY. In addition, international outgoing and incoming parcels recorded growth in the quarter, but recorded decline year-on-year as shown in Table 17.

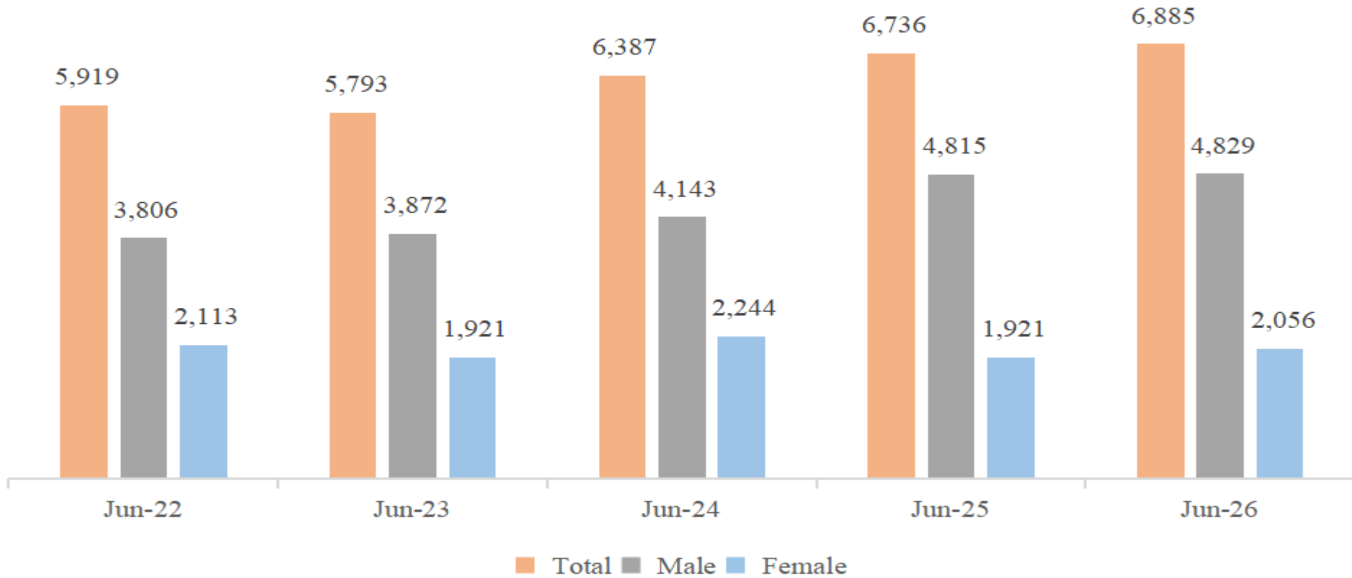
Table 17: Courier Items

Indicator/ Period		*Apr-Jun 26*	*Jan-Mar 26*	*Quarterly Variation (%)*	*FY 2025/26*	*FY 2024/25*	*Annual Variation (%)*
Letters	Domestic	912,480	636,566	43.3	3,228,902	3,310,558	-2.5
	International Outgoing	14,320	14,079	1.7	58,566	54,799	6.9
	International Incoming	35,764	27,676	29.2	127,014	113,616	11.8
Parcels	Domestic	3,371,364	3,683,993	-8.5	14,417,951	13,193,999	9.3
	International Outgoing	19,275	17,221	11.9	89,198	214,042	-58.3
	International Incoming	244,545	190,097	28.6	719,452	1,160,934	-38.0

Source: CA, Operators' Returns, parcels include volumes generated through e-commerce services

3.3 Employment in Postal and Courier Market Segment

Figure 17 shows the number of male and female employees in postal/courier sub-sector as of June 2026.



Source: CA, Operators' Returns

Figure 17: Employment in Postal and Courier

3.4 Revenues in Courier Market Segment

Table 18 presents revenues by private courier operators offering national and international courier services as per their audited financial accounts for the year 2025. Total revenues increased by 6.7 per cent from KSh 6.28 billion in 2024 to 6.70 billion in 2025. Revenue generated by national courier operators increased by 67.5 per cent to 2.01 billion while revenue generated by international courier operators declined by 7.7 per cent to 4.69 billion.

Table 18: Revenues in Courier Market Segment

Indicator/Period	***2025***	***2024***	***Annual Variation (%)***
National Courier Revenue (Billion) in KES	2.01	1.20	67.5
International Courier Revenue (Billion) in KES	4.69	5.08	-7.7
Total Revenues in KES	**6.70**	**6.28**	**6.7**

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

4. BROADCASTING SERVICES

4.1 Subscription to Broadcasting Services

The total number of subscriptions to broadcasting services stood at 1.5 million as of June 30th, 2026, representing a 1.8 per cent drop from last quarter, mainly attributed to lose of clients to IPTV subscribers and changes in the cost of Set-Top Boxes (STBs/decoders), following increases in global chipset costs and related component prices. The resulting increase in decoder acquisition costs constrained the ability of operators to sustain the previous level of new customer activations, consequently contributing to the decline in subscriptions recorded during the quarter.

However, compared to June 2025, broadcasting subscriptions increased by 4.9 per cent to 1.55 million by end of June 2026

Table 19: Broadcasting Active Subscriptions

Indicator/Period		*Jun-26*	*Mar-26*	*Quarterly Variation (%)*	*Jun-26*	*Jun-25*	*Annual Variation (%)*
DTT	Go TV	381,383	405,013	-5.8	381,383	314,520	21.3
	Star Times	493,394	492,887	0.1	493,394	492,330	0.2
	Sub-Total	**874,777**	**897,900**	**-2.6**	**874,777**	**806,850**	**8.4**
DTH	Azam	37,978	36,031	5.4	37,978	30,095	26.2
	MultiChoice (DSTV)	259,047	248,053	4.4	259,047	188,824	37.2
	Star Times	189,871	188,283	0.8	189,871	195,948	-3.1
	Wananchi (Zuku)	157,051	173,396	-9.4	157,051	187,839	-16.4
	Sub-Total	**643,947**	**645,763**	**-0.3**	**643,947**	**602,706**	**6.8**
Cable	Cable One	1,234	1,252	-1.4	1,234	1,316	-6.2
	CTN (MSA)	320	458	-30.1	320	484	-33.9
	Wananchi (ZUKU)	27,831	31,113	-10.5	27,831	64,212	-56.7
	Hirani	760	758	0.3	760	758	0.3
	Wadani Cable	95	95	0.0	95	95	0.0
	Sub-Total	**30,240**	**33,676**	**-10.2**	**30,240**	**66,865**	**-54.8**
Total		**1,548,964**	**1,577,339**	**-1.8**	**1,548,964**	**1,476,421**	**4.9**

Source: CA, Broadcasting Operators' Returns

5. FREQUENCY SPECTRUM MANAGEMENT

The Authority assigned 10,554 frequencies to various operators for the deployment of microwave links and 978 frequencies for FM sound broadcasting in the fourth quarter translating to a 0.4 per cent and 0.2 per cent increase, respectively, compared to third quarter. However, the number of assigned microwave link and FM sound broadcasting frequencies declined by 5.8 per cent and 6.1 per cent, respectively, in the 2025/2026 financial year, as shown in Table 20.

Table 20: Frequency Spectrum Management

Indicator/Period	*Apr-Jun 26*	*Jan-Mar 26*	*Quarterly Variation (%)*	*FY 2025/26*	*FY 2024/25*	*Annual Variation (%)*
Assigned Microwave Links	10,554	10,508	0.4	41,393	43,942	-5.8
FM Sound Broadcasting Frequencies Assigned	978	976	0.2	3,894	4,147	-6.1

Source: CA

6. ELECTRONIC TRANSACTIONS AND CYBER SPACE MANAGEMENT

6.1 Registered Domain Names

There was a decline in the number of SC.KE, ME.KE and INFO.KE registrations for the 2025/2026 financial year mainly attributed to the conclusion of the promotional campaigns by domain registrars. Table 21 illustrates various registered sub-domains and their respective number of users as of June 30th, 2026.

Table 21: .KE Domains

SUB-DOMAIN	USER	Number of Users				
		Jun-26	*Mar-26*	*Quarterly Variation (%)*	*Jun-25*	*Annual Variation (%)*
Total		**129,140**	**124,498**	**3.7**	**111,313**	**16.0**
CO.KE	Companies	114,662	110687	3.6	98,808	16.0
OR.KE	Non-Profit-Making Organizations	2,154	2122	1.5	2,061	4.5
AC.KE	Institutions of Higher Education	1,511	1465	3.1	1,386	9.0
SC.KE	Lower and Middle Level Institutions	1,016	1028	-1.2	1,061	-4.2
NE.KE	Personal Websites and E-mail	83	75	10.7	65	27.7
ME.KE	Personal Websites and E-mail	202	195	3.6	210	-3.8
MOBI.KE	Mobile Content	77	36	113.9	27	185.2
INFO.KE	Information	107	108	-0.9	129	-17.1
GO.KE	Government Institutions	928	911	1.9	857	8.3
.KE	Second Level	8,400	7871	6.7	6,709	25.2

Source: KeNIC

6.2 National Cyber Space Landscape

The total number of cyber threats detected during the quarter declined by 30.0 per cent to 2.4 billion, compared with the previous quarter. However, the total number of cyber threats increased by 29.0 per cent during the 2025/2026 financial year, from 8.6 billion recorded in the preceding financial year.

On the other hand, cyber advisories issued during the quarter increased by 0.8 per cent, from 20.6 million reported in the previous quarter to 20.8 million. On an annual basis, cyber advisories issued to affected ICT users increased by 60.8 per cent to 83.1 million in the financial year ended June 30th, 2026, as shown in Table 22.

Table 22: Cybersecurity Landscape

Threats and Advisories	*Apr-Jun 26*	*Jan–Mar 26*	*Quarterly Variation (%)*	*FY 2025/26*	*FY 2024/25*	*Annual Variation (%)*
CYBER THREATS						
Malware	58,997,257	68,726,328	-14.2	230,307,810	139,761,641	64.8
Brute Force Attacks	24,243,919	46,384,747	-47.7	132,225,836	127,661,475	3.6
Web Application Attacks	17,406,495	12,115,001	43.7	51,508,883	25,887,299	99.0
System Vulnerabilities	2,254,287,819	3,231,465,502	-30.2	10,637,635,755	8,298,719,478	28.2
Mobile Application Attacks	183,377	219,549	-16.5	789,826	512,903	54.0
DDOS	819,325	8,202,803	-90.0	72,164,664	33,680,462	114.3
Total	**2,355,938,192**	**3,367,113,840**	**-30.0**	**11,124,632,684**	**8,622,876,858**	**29.0**
CYBER ADVISORIES						
Malware	552,545	525,853	5.1	2,270,003	1,675,379	35.5
Brute Force Attacks	1,067,067	1,219,838	-12.5	25,504,883	5,478,683	365.5
Web Application Attacks	10,594,943	10,398,275	1.9	40,513,541	19,247,176	110.5
System Attacks	8,374,577	8,110,197	3.3	31,773,399	22,614,348	40.5
Mobile Application Attacks	14,012	9,670	44.9	41,663	53,614	-22.3
DDOS	145,345	317,921	-54.3	2,673,948	2,593,824	3.1
Total	**20,748,489**	**20,581,754**	**0.8**	**83,096,015**	**51,663,024**	**60.8**

Source: National KE-CIRT/CC

7. CONCLUSION

During the fourth quarter of the 2025/2026 financial year, the ICT sector continued to contribute to the development of Kenya’s information society, supported by growth in mobile cellular telephone, mobile money and mobile broadband subscriptions, as well as growth in smartphone penetration. Increase in fixed internet subscriptions further points to sustained demand for digital connectivity and services across the country. The continued shift towards internet-based communication and digital content, including over-the-top and video-on-demand services, is expected to drive demand for broadband connectivity and active bandwidth capacity.