THIRD QUARTER SECTOR STATISTICS REPORT FOR THE FINANCIAL YEAR 2024/2025 (JANUARY 1ST–MARCH 31ST, 2025)

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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	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 supply side perspective. It is key to note that this report **does not include demand side data** (data collected from consumers of ICT services) 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. The Authority in collaboration with KNBS have released the findings of the latest ICT Survey available on https://www.ca.go.ke/reports-and-studies.

SUMMARY OF ICT INDICATORS

This Third Quarter Sector Statistics Report for the 2024/2025 Financial Year provides the performance and trends in uptake of ICT services for the period January 1st to March 31st, 2025, in the following categories:

1. Telecommunication Services
2. Postal & Courier Services
3. Broadcasting Services
4. Frequency Spectrum Management
5. Electronic Transactions and Cyberspace Management

Summary of Indicators			
Indicator/Period	***Jan-Mar 25***	***Oct-Dec 24***	***Quarterly Variation (%)***
MOBILE NETWORK SERVICES			
Subscriptions to Mobile Services			
Total Mobile (SIM) Subscriptions	76,156,307	71,375,093	6.7
Machine-to-Machine (M2M) Subscriptions	1,983,727	1,915,997	3.5
Mobile Money Transfer Services			
Number of Registered Mobile Money Agents	416,994	395,366	5.5
Mobile Money Subscriptions	45,363,154	42,302,833	7.2
Mobile Data and Broadband Subscriptions			
Mobile Data Subscriptions	57,177,232	56,104,736	1.9
Mobile Broadband Subscriptions	44,439,471	43,395,364	2.4
Mobile Phone Devices			
Feature Phones	32,573,748	30,579,714	6.5
Smartphones	42,349,405	41,477,527	2.1
Domestic Mobile Traffic			
Mobile Voice Traffic (Minutes)			
On-Net Voice Traffic	24,363,240,349	23,123,066,268	5.4
Off-Net Voice Traffic	4,514,954,739	4,296,590,445	5.1
Mobile to Fixed Network	15,967,937	16,773,826	-4.8
Mobile SMS Traffic			
SMS On-Net	12,657,205,133	12,314,953,178	2.8
SMS Off-Net	1,660,424,828	1,798,154,220	-7.7
International Mobile Traffic			

Summary of Indicators			
Indicator/Period	***Jan-Mar 25***	***Oct-Dec 24***	***Quarterly Variation (%)***
Mobile Voice Traffic (Minutes)			
International Incoming Mobile Voice Traffic	163,036,189	142,476,522	14.4
International Outgoing Mobile Voice Traffic	179,754,337	177,319,538	1.4
Mobile SMS Traffic			
International Incoming SMS	6,444,800	7,321,545	-12.0
International Outgoing SMS	2,721,952	4,442,686	-38.7
Roaming Traffic			
Out - bound Roaming Traffic			
Out-bound Roaming Incoming Voice Traffic (Minutes)	153,438,403	149,817,912	2.4
Out-bound Roaming Outgoing Voice Traffic (Minutes)	8,514,662	8,597,279	-1.0
Out-bound Roaming Incoming SMS	80,550,422	82,500,854	-2.4
Out-bound Roaming Outgoing SMS	4,926,129	5,490,085	-10.3
Data Volumes (MB)	107,244,013	133,243,567	-19.5
In-bound Roaming Traffic			
In-bound Roaming Incoming Voice Traffic (Minutes)	174,005,627	168,934,007	3.0
In-bound Roaming Outgoing Voice Traffic (Minutes)	4,816,890	4,995,398	-3.6
In-bound Roaming Incoming SMS	54,983,417	55,210,620	-0.4
In-bound Roaming Outgoing SMS	2,081,261	2,225,408	-6.5
Data Volumes (MB)	564,834,166	510,882,168	10.6
FIXED NETWORK SERVICES			
Fixed Voice Subscriptions			
Fixed Line Subscriptions	8,289	8,289	0.0
Fixed Wireless Subscriptions	1,607	1,552	3.5
Fixed VoIP Subscriptions	47,217	47,176	0.1
Domestic Fixed Voice Traffic			
Fixed line-Fixed line	109,613	109,613	0.0
Fixed Wireless-Fixed Wireless	312,473	283,264	10.3
Fixed - Mobile	19,946,421	19,946,421	0.0
International Fixed Voice Traffic			
Incoming Fixed Voice Traffic	5,055,311	4,868,590	3.8
Outgoing Fixed Voice Traffic	1,010,822	1,000,530	1.0
Outgoing Fixed VOIP	534,470	504,565	5.9
Fixed Data and Broadband Services			
Fixed Data/Internet subscriptions	1,857,574	1,718,679	8.1
Total Available International Bandwidth (Gbps)	22,154.438	22,154.438	0.0

Summary of Indicators			
Indicator/Period	***Jan-Mar 25***	***Oct-Dec 24***	***Quarterly Variation (%)***
Total Used International Bandwidth (Gbps)	45,304,359.860	34,156,520.298	32.6
POSTAL AND COURIER SERVICES			
Posta Traffic			
Domestic Letters	145,627	815,075	-82.1
International Outgoing Letters	14,727	6,708	119.5
International Incoming Letters	23,435	500,263	-95.3
Domestic Parcels	161,331	641,262	-74.8
International Outgoing Parcels	111,850	19,369	477.5
International Incoming Parcels	108,416	324,671	-66.6
Courier Traffic			
Domestic Letters	764,948	816,344	-6.3
International Outgoing Letters	23,506	15,502	51.6
International Incoming Letters	39,540	35,088	12.7
Domestic Parcels	2,762,007	3,706,664	-25.5
International Outgoing Parcels	24,638	22,927	7.5
International Incoming Parcels	194,148	206,369	-5.9
BROADCASTING SERVICES			
DTT Subscriptions	4,546,041	4,534,925	0.2
DTH Subscriptions	1,655,842	1,594,237	3.9
Cable Subscriptions	83,560	63,549	31.5
FREQUENCY SPECTRUM MANAGEMENT			
Microwave links Deployed	11,458	11,249	1.9
FM Sound Broadcasting Frequencies Assigned	1,035	1,055	-1.9
ELECTRONIC TRANSACTIONS AND CYBERSPACE MANAGEMENT			
.KE Domain	109,251	108,154	1.0
Total Cyber Threats Detected	2,537,428,868	840,921,998	201.7
Total Cyber Threat Advisories	13,227,510	11,584,581	14.2
POPULATION			
Total Population in Kenya (Millions)	52,428,290*	51,525,602	1.8

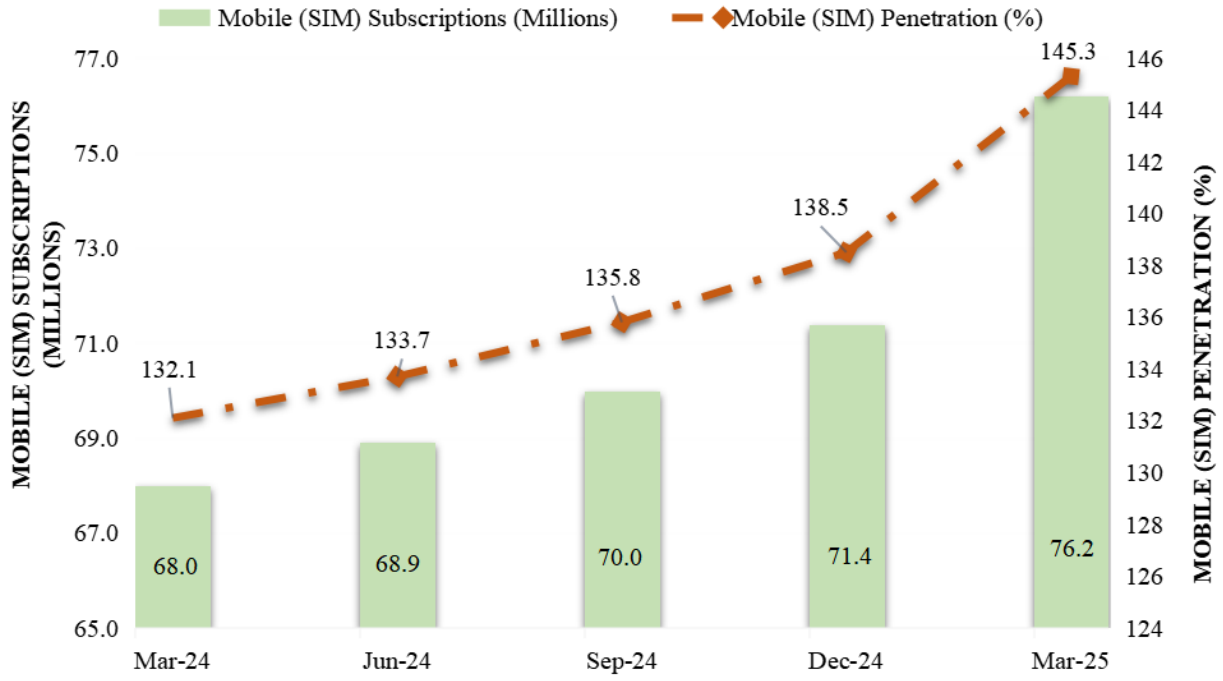
**Economic Survey 2025*

1. MOBILE NETWORK SERVICES

1.1 Mobile (SIM) Subscriptions

During the period ending March 2025, active mobile (SIM) subscriptions grew by 6.7 per cent to 76.2 million translating to a penetration rate of 145.3 per cent. This growth is attributed to the various customer win back campaigns run by the operators during the reference period.

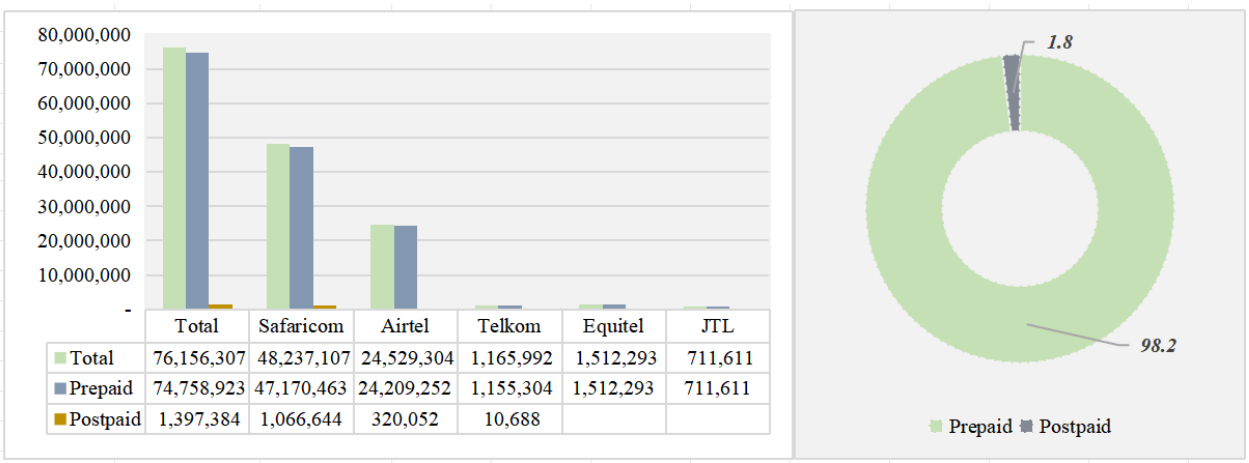
Figure 1 illustrates the trends in mobile (SIM) subscriptions and penetration rate.



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

Figure 1: Mobile Subscriptions and Penetration

The number of active mobile (SIM) subscriptions per operator by contract type is as shown in Figure 2.



	Total	Safaricom	Airtel	Telkom	Equitel	JTL
Total	76,156,307	48,237,107	24,529,304	1,165,992	1,512,293	711,611
Prepaid	74,758,923	47,170,463	24,209,252	1,155,304	1,512,293	711,611
Postpaid	1,397,384	1,066,644	320,052	10,688		

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

Figure 2: Mobile SIM Subscription by Contract Type

1.2 Machine-to-Machine (M2M[1]) Subscriptions

As shown in Table 1, Machine-to-Machine (M2M) subscriptions grew by 3.5 percent to reach 1.98 million during the quarter.

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

Indicator/Period	***Mar-25***	***Dec-24***	***Quarterly Variation (%)***
Machine to Machine (M2M)	1,983,727	1,915,997	3.5

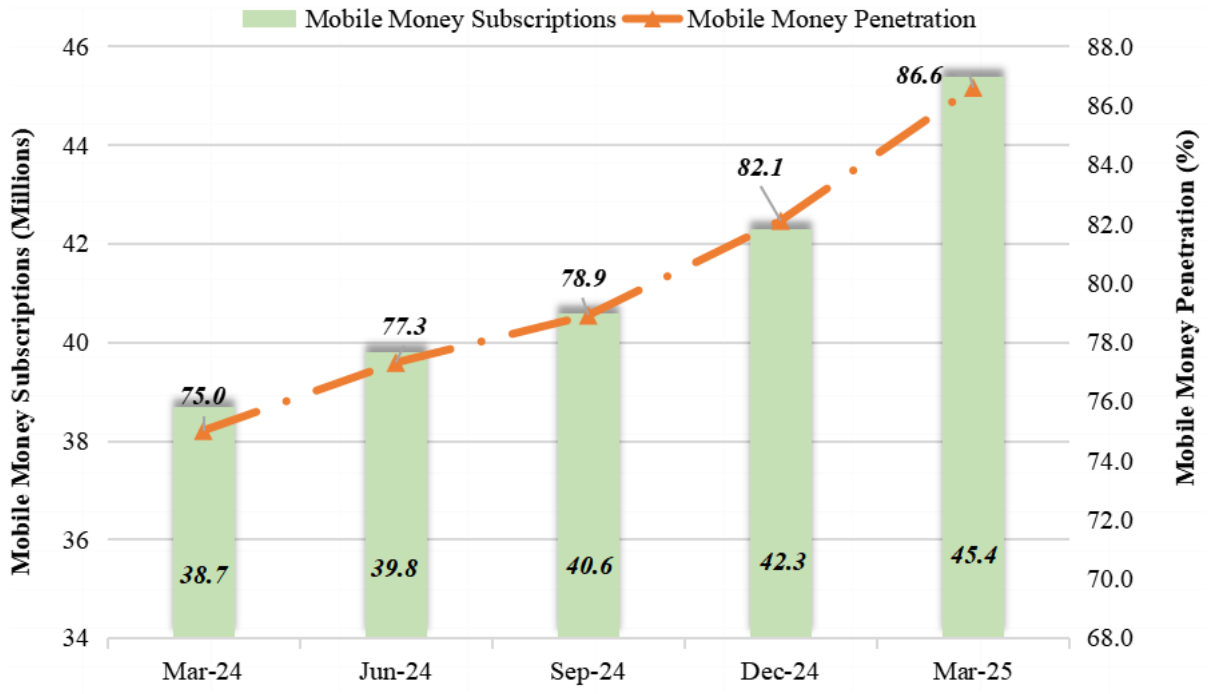
Source: CA, Operators' Returns, Provisional Data for Telkom Kenya Limited

1.3 Mobile Money Services

Mobile money subscriptions grew by 7.3 per cent to 45.4 million translating to a penetration rate of 86.6 percent during the quarter. This growth is synonymous to the increase in active mobile (SIM) subscriptions.

Figure 3 illustrates the trends in mobile money subscriptions and penetration rates.

[1] **Machine to Machine subscriptions (M2M subscriptions)** refer to the number of mobile cellular machine-to-machine subscriptions that are assigned for use in machines and devices (cars, smart meters, consumer electronics) for the exchange of data between networked devices and are not part of a consumer subscription. For instance, SIM-cards in personal navigation devices, smart meters, trains and automobiles are included while mobile dongles and tablet subscriptions are excluded. Only active subscriptions are counted.



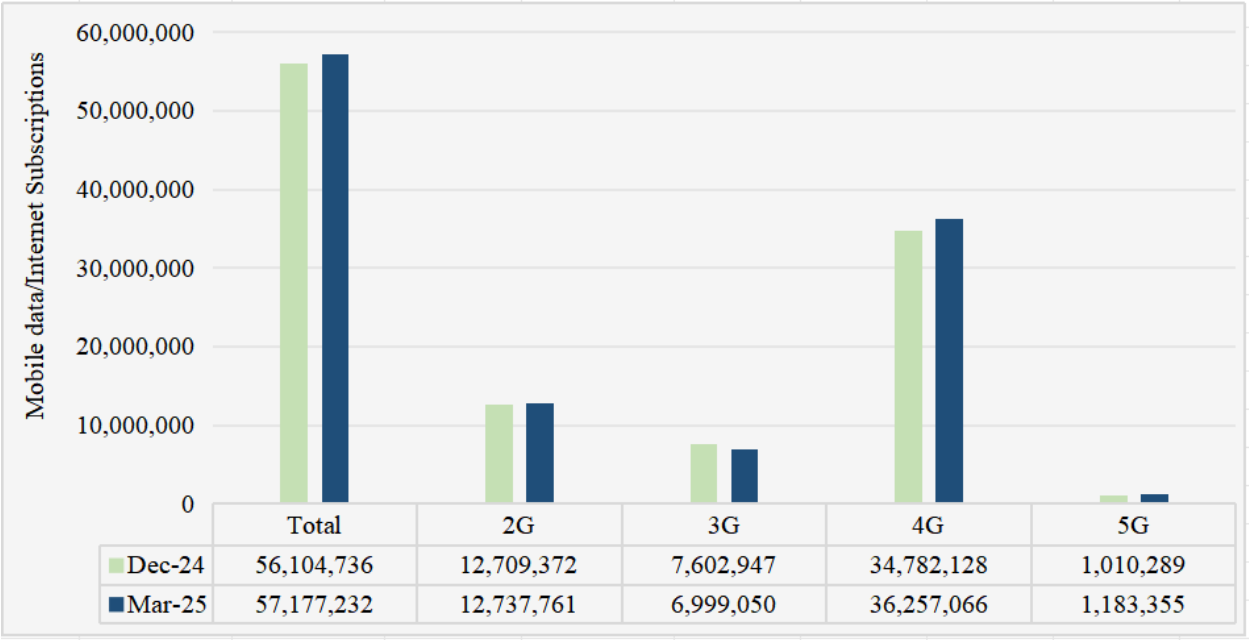
Source: CA, Operators' Returns, Provisional Data for Telkom Kenya Limited

Figure 3:Mobile Money Services

1.4 Mobile Data and Broadband[2] Services

As shown in figure 4, mobile data/Internet subscriptions grew by 1.9 per cent to 57.2 million from 56.1 million reported in the preceding quarter. The growing demand for faster internet speeds has served as a key driver for the increased uptake of 4G and 5G mobile services.

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

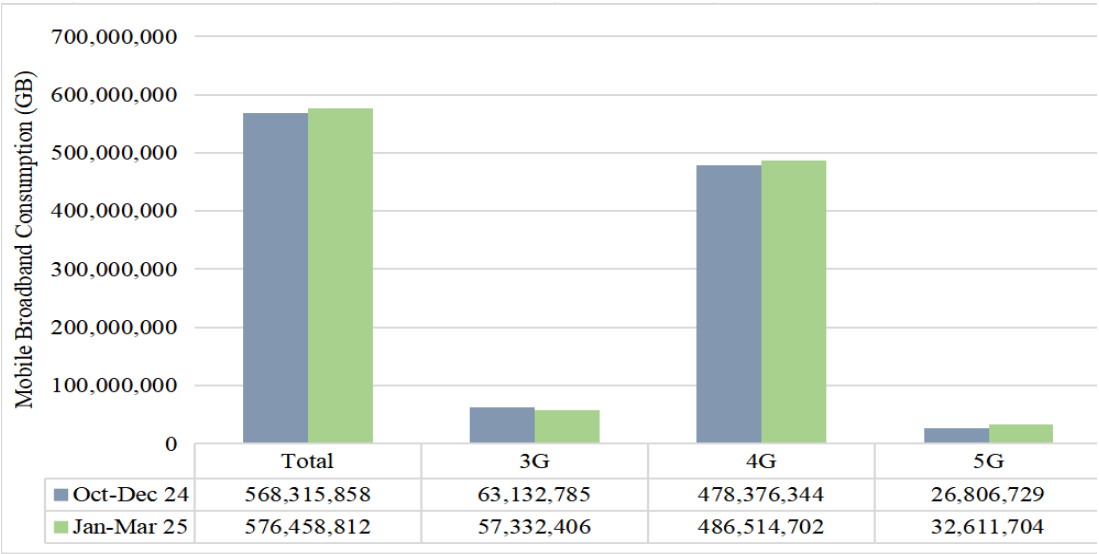


	Total	2G	3G	4G	5G
Dec-24	56,104,736	12,709,372	7,602,947	34,782,128	1,010,289
Mar-25	57,177,232	12,737,761	6,999,050	36,257,066	1,183,355

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

Figure 4: Mobile Data Subscriptions

As shown in Figure 5, mobile broadband data volume rose by 1.4 percent, reaching 576,458.8 Terabytes. However, the average mobile broadband consumption per subscription marginally declined from 13.1 GB to 13.0 GB.



	Total	3G	4G	5G
Oct-Dec 24	568,315,858	63,132,785	478,376,344	26,806,729
Jan-Mar 25	576,458,812	57,332,406	486,514,702	32,611,704

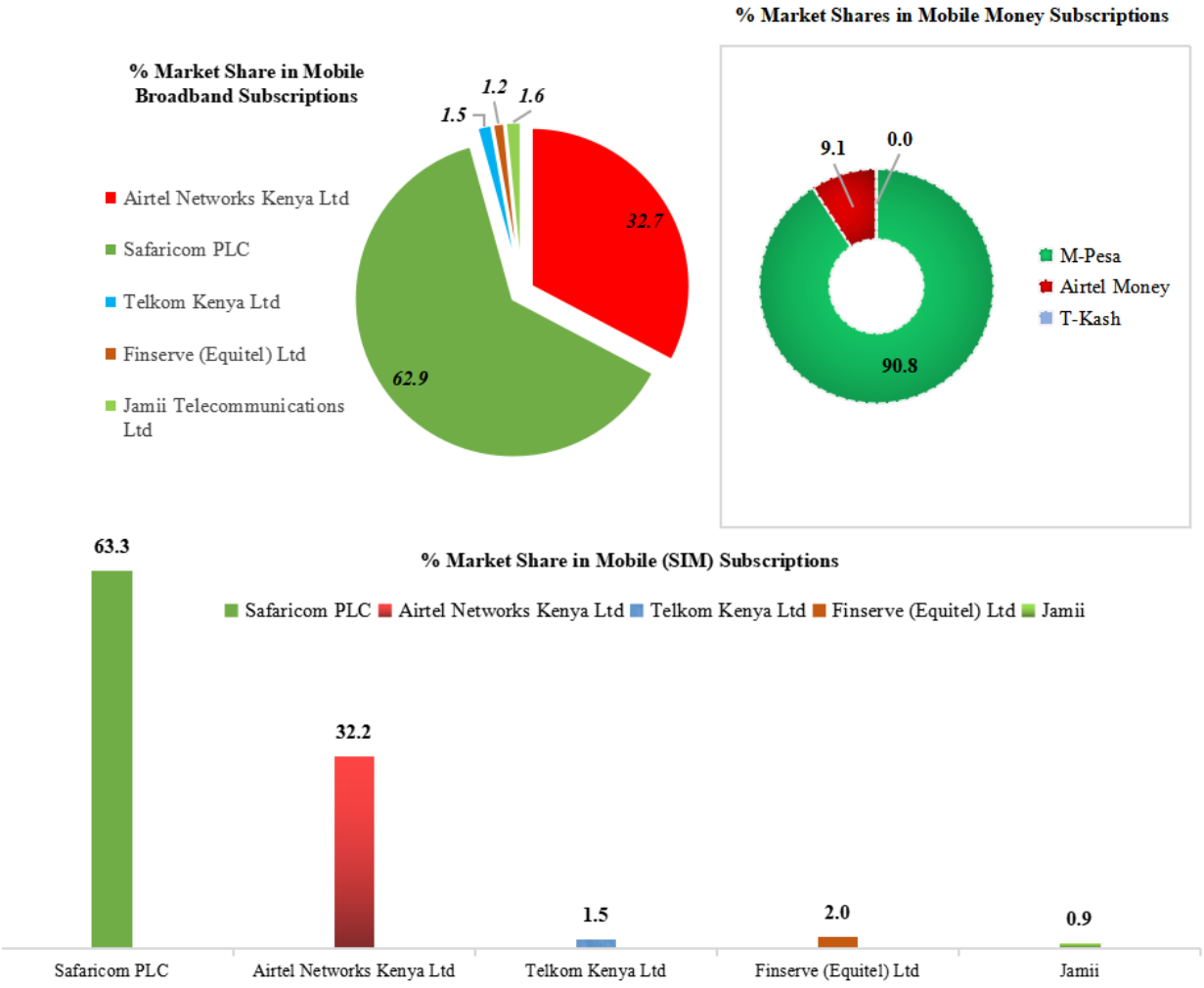
Average Mobile Broadband Consumption (GB) per mobile broadband subscription	*Total*	*3G*	*4G*	*5G*
Oct-Dec 24	13.1	8.3	13.8	26.5
Jan-Mar 25	13.0	8.2	13.4	27.6

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

Figure 5: Mobile Broadband Subscriptions and Consumption

1.5 Market Share in Mobile Service Subscriptions

The market share in subscriptions for the respective mobile services is as shown in Figure 6.



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

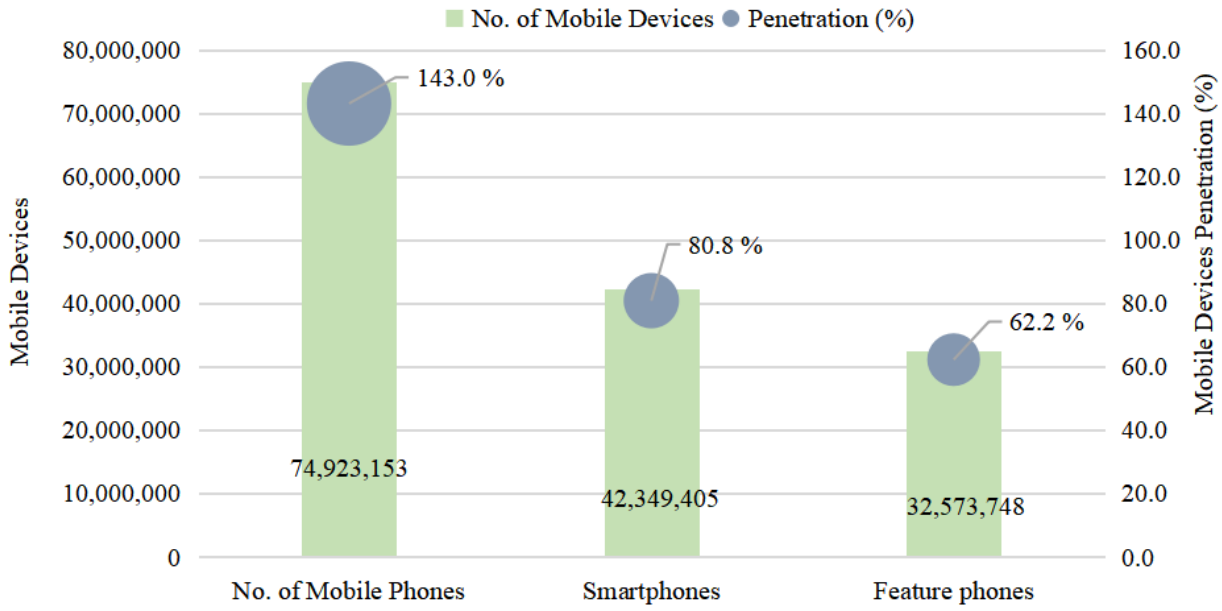
Figure 6: Mobile Market Shares

1.6 Mobile Phone Devices

The total number of mobile phones[3] connected to mobile networks stood at 74.9 million out of which 42.3 million were smartphones and 32.6 million feature phones. Consequently, the overall

[3] includes all mobile phones that were connected to mobile networks as at the end of the quarter. It is subject to multiple phone ownership and therefore it should NOT be mistaken for mobile phone ownership which is measured through surveys. The Authority in collaboration with KNBS released the findings of the latest ICT Survey available on https://www.ca.go.ke/reports-and-studies

mobile phone penetration was 143.0 percent while that of smartphones and feature phones was 80.8 percent and 62.2 percent, respectively as shown in Figure 7.



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

Figure 7: Mobile Phone Devices

1.7 Domestic Mobile Voice and SMS Traffic

During the reference period, there was a general increase in domestic traffic. Voice traffic increased to 28.8 billion from 27.4 billion whereas SMS traffic grew to 14.3 billion from 14.1 billion recorded last quarter as shown in Table 2.

Table 2: Domestic Mobile Traffic per Operator

Name of Operator /Indicator			***Safaricom PLC***	***Airtel Networks Kenya Ltd***	***TKL****	***Finserve***	***JTL***	***Total***
Jan-Mar 25	***Outgoing Voice***	***Total***	**18,299,975,382**	**10,438,184,258**	**108,718,702**	**22,631,879**	**8,684,867**	**28,878,195,088**
		On-net	16,879,797,254	7,424,016,359	57,975,303	1,351,098	100,335	24,363,240,349
		Off-net	1,420,178,128	3,014,167,899	50,743,399	21,280,781	8,584,532	4,514,954,739
	Outgoing SMS	***Total***	**12,727,934,816**	**1,576,016,443**	**8,509,754**	**4,464,351**	**704,597**	**14,317,629,961**
		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	8,202,148	3,343,297	652,911	1,660,424,828
Oct-Dec 24	***Outgoing Voice***	***Total***	**17,446,506,212**	**9,831,042,139**	**108,718,702**	**23,195,583**	**10,194,077**	**27,419,656,713**
		On-net	16,075,562,889	6,987,899,559	57,975,303	1,514,344	114,173	23,123,066,268
		Off-net	1,370,943,323	2,843,142,580	50,743,399	21,681,239	10,079,904	4,296,590,445
	Outgoing SMS	***Total***	**12,404,116,519**	**1,695,748,501**	**8,509,754**	**3,637,018**	**1,095,606**	**14,113,107,398**
		On-net	11,524,102,002	789,370,564	307,606	1,132,385	40,621	12,314,953,178
		Off-net	880,014,517	906,377,937	8,202,148	2,504,633	1,054,985	1,798,154,220

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

1.8 Minutes of Use per Call per Operator

The total average minutes per on-net and off net calls remained the same as last quarter at 1.8 and 1.3 minutes respectively. Airtel Networks Limited recorded the highest average on-net minutes/call at 2.9 whereas Safaricom PLC and Jamii Telecommunications Ltd recorded the highest off net minutes/call at 1.4.

Table 3 shows the average minutes per call.

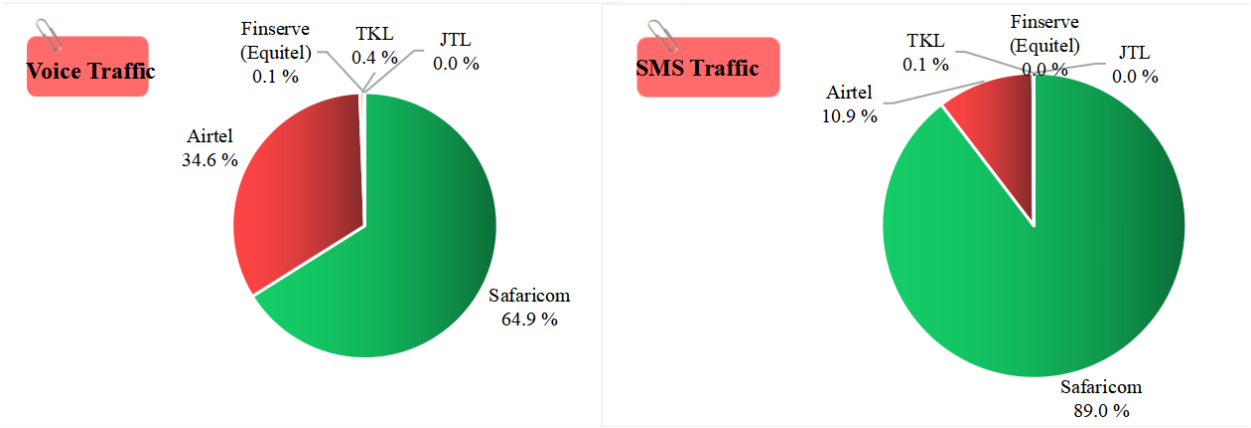
Table 3: MoU per Call

Period	***Jan-Mar 25***		***Oct-Dec 24***	
Operator/Indicator	**On-net**	**Off-net**	**On-net**	**Off-net**
Total Average	**1.8**	**1.3**	**1.8**	**1.3**
Safaricom PLC	1.6	1.4	1.6	1.4
Airtel Networks Limited	2.9	1.3	2.8	1.2
Telkom Kenya Limited*	1.5	1.2	1.5	1.2
Finserve (Equitel)	2.0	1.3	2.1	1.3
Jamii Telecommunications Ltd	0.1	1.4	0.1	1.4

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

1.9 Market shares in Domestic Mobile Voice and SMS Traffic

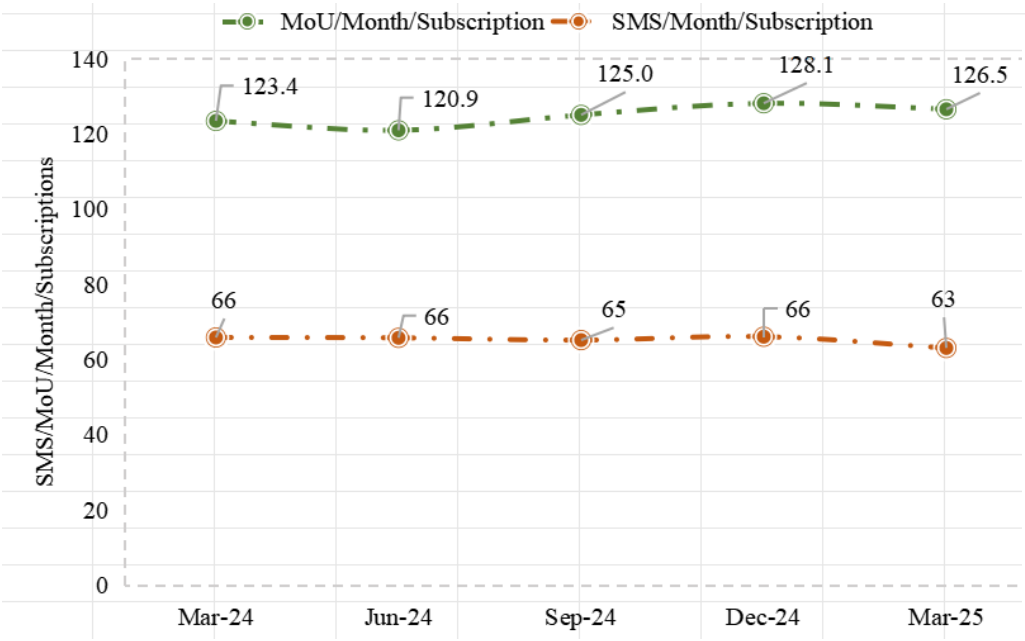
The market shares in domestic mobile voice and SMS traffic are as shown in Figure 8.



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

Figure 8: Market Shares in Domestic Mobile Voice and SMS

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



Regardless of the growth in voice and SMS traffic, the Minutes of Use per Month per Subscription dropped to post 126.5 minutes from 128.1 minutes reported in quarter 2. Similarly, short messages sent per month per subscription declined from 66 to 63 messages. This decline is attributed to the fact that the rate of growth in subscriptions was higher than that of voice and SMS traffic.

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

Figure 9: MoU/Month/Subscription vs SMS/Month/Subscription

1.11 International Mobile Traffic

As shown in Table 4, total international incoming and total outgoing mobile voice traffic in minutes increased by 14.4 and 1.4 percent to record 163.0 million minutes and 179.8 million minutes respectively. The incoming and outgoing international mobile SMS were recorded at 6.4 million and 2.7 million messages, respectively.

Table 4: International Mobile Traffic

Indicator/Period	***Region***	***Jan-Mar 25***	***Oct-Dec 24***	***Quarterly Variation (%)***
Incoming International Mobile Voice Minutes	*EAC*	113,892,029	106,503,088	6.9
	Others	49,144,160	35,973,434	36.6
	Total	**163,036,189**	**142,476,522**	**14.4**
Outgoing International Mobile Voice Minutes	*EAC*	139,743,779	136,589,868	2.3
	Others	40,010,558	40,729,670	-1.8
	Total	**179,754,337**	**177,319,538**	**1.4**
Incoming International Mobile SMS		6,444,800	8,438,174	-23.6
Outgoing International Mobile SMS		2,721,952	2,605,963	4.5

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

1.12 Roaming Traffic

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

Table 5: Outbound Roaming Traffic

Country / Indicator	*Incoming Voice (Minutes)*	*Incoming SMS*	*Outgoing Voice (Minutes)*	*Outgoing SMS*	*Data Volumes (MB)*
Uganda	123,951,068	4,339	2,857,874	1,238,544	45,955,245
Tanzania	16,634,065	17,379,973	1,008,134	630,811	13,949,456
Rwanda	3,333,816	10	810,826	98,571	4,533,577
Burundi	122,798	1,423,193	3,060	5,259	10,954
S. Sudan	8,329,020	1,642	549,873	200,034	483,152
Democratic Republic of Congo	3,321	81,955	323,455	33,194	6,407,127
EAC Total	**152,374,088**	**18,891,112**	**5,553,222**	**2,206,413**	**71,339,511**
Others	1,064,315	61,659,310	2,961,440	2,719,716	35,904,502
Total	**153,438,403**	**80,550,422**	**8,514,662**	**4,926,129**	**107,244,013**

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

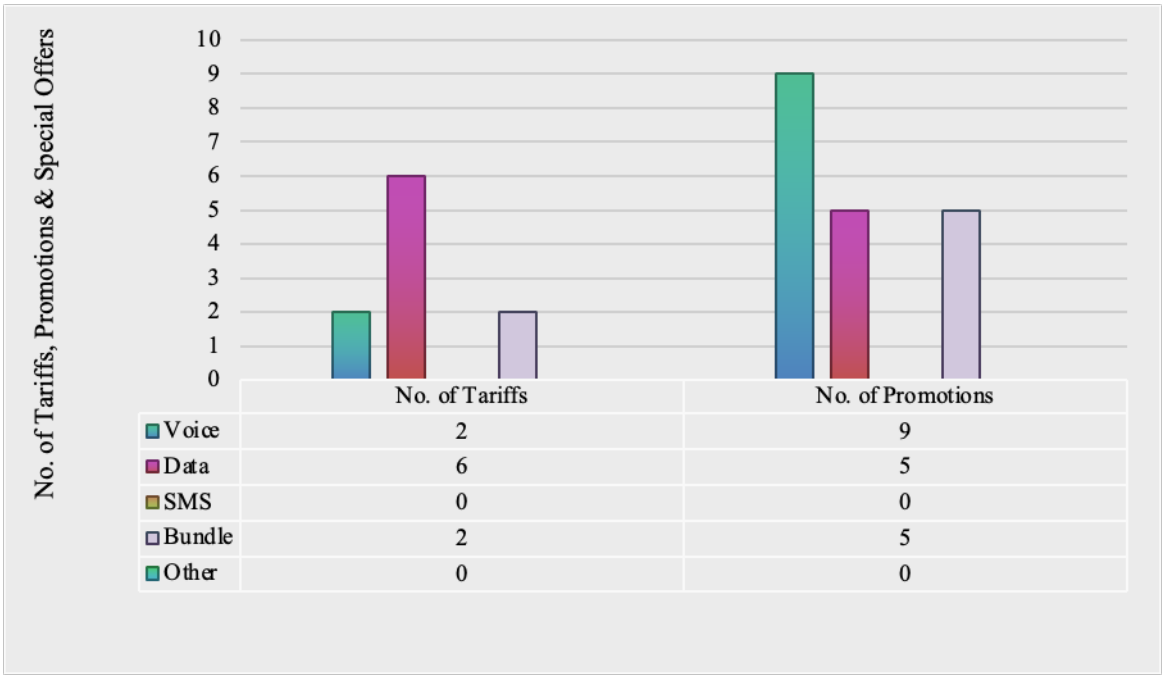
Table 6: In-bound Roaming Traffic

Country / Indicator	*Incoming Voice (Minutes)*	*Incoming SMS*	*Outgoing Voice (Minutes)*	*Outgoing SMS*	*Data Volumes (MB)*
Uganda	32,338,018	5,425,143	1,629,985	231,528	19,858,238
Tanzania	118,176,289	19,890,054	640,530	259,844	1,964,165
Rwanda	20,968,157	2,803,521	146,617	27,864	272,141
Burundi	1,094	3,782	905	7,963	220
S. Sudan	1,367,824	4,561,776	110,577	15,909	104,514
Democratic Republic of Congo	7,680	223,064	57,325	8,594	280,008
EAC Total	**172,859,062**	**32,907,340**	**2,585,939**	**551,702**	**22,479,286**
Others	1,146,565	22,076,077	2,230,951	1,529,559	542,354,880
Total	**174,005,627**	**54,983,417**	**4,816,890**	**2,081,261**	**564,834,166**

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

1.13 Tariffs, Promotions and Special Offers

The number of approved tariffs, promotions & special offers applications by MNOs during the review period is as shown in Figure 10.



Source: Operator Applications for tariffs, promotions and special offers

Figure 10: 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 are as shown in Table 7.

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

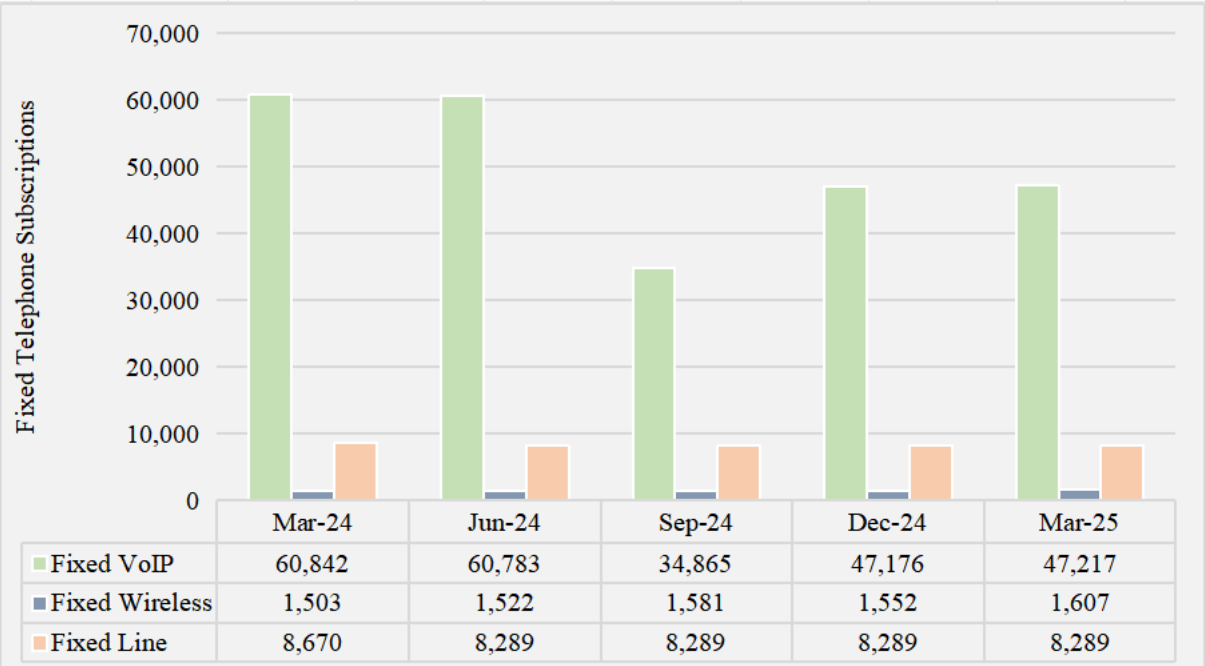
Operator/Market	***Average Voice (KES/Min)***	***SMS (KES/SMS)***	***Data (KES/MB)***
Safaricom PLC	4.87	1.20	4.87
Airtel Network Limited	2.78	1.20	4.50
	4.50	1.20	4.50
Telkom Kenya Limited	3.54	1.15	4.50
Average	**3.92**	**1.19**	**4.59**

Source: Operator Applications for tariffs

2. FIXED NETWORK SERVICES

2.1 Fixed Telephone Subscriptions

As shown in Figure 11, subscriptions to fixed VoIP and wireless services grew by 0.1 and 3.5 percent to 47,217 and 1,607 subscriptions respectively.



	Mar-24	Jun-24	Sep-24	Dec-24	Mar-25
Fixed VoIP	60,842	60,783	34,865	47,176	47,217
Fixed Wireless	1,503	1,522	1,581	1,552	1,607
Fixed Line	8,670	8,289	8,289	8,289	8,289

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

Figure 11: Fixed Voice Subscriptions

2.2 Domestic Fixed Voice Traffic

The total domestic fixed network voice traffic increased by 0.1 percent to record 20.36 million minutes as shown in Table 8.

Table 8: Domestic Fixed Voice Traffic

Domestic Fixed Voice Traffic (Minutes)	***Jan-Mar 25***	***Oct-Dec 24***	***Quarterly Variation (%)***
Fixed-Fixed*	109,613	109,613	0.0
Fixed Wireless-Fixed Wireless	312,473	283,264	10.3
Fixed to Mobile*	19,946,421	19,946,421	0.0
Total Domestic Fixed Network Traffic	**20,368,507**	**20,339,298**	**0.1**

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

2.3 International Fixed Voice Traffic

Table 9 illustrates the volume of international fixed voice traffic recorded during the quarter.

Table 9: International Fixed Voice Traffic

Indicator/Period	*Jan-Mar 25*	*Oct-Dec 24*	*Quarterly Variation (%)*
International Incoming Fixed Network Voice Traffic*	5,055,311	4,868,590	3.8
International Outgoing Fixed Network Voice Traffic*	1,010,822	1,000,530	1.0
International Outgoing Fixed VoIP Traffic	534,470	504,565	5.9

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

2.4 Fixed Internet Subscriptions by Technology

Overall, subscriptions to fixed Internet services grew by 8.1 percent during the reference period, majorly driven by increase in terrestrial fixed wireless subscriptions, as shown in Table 10. However, satellite Internet subscriptions dropped by 9.9 percent compared to quarter two of the 2024/2025 financial year, a decline attributed to the drop in subscriptions of the Low Earth Orbit satellite Internet provided by Starlink Internet Services Kenya.

Table 10: Fixed Internet Subscriptions by Technology

Indicator/Period	*Mar 25*	*Dec 24*	*Quarterly Variation (%)*
Total Wireless Subscriptions	**521,810**	**462,071**	**12.9**
Terrestrial Wireless Data Subscribers	504,335	442,668	13.9
Satellite Data Subscribers	17,475	19,403	-9.9
Total Fixed (Wired) Subscriptions	**1,256,974**	**1,256,608**	**0.0**
Fixed DSL Data Subscribers (Copper)	137	137	0.0
Fixed Fibre Optic Data Subscribers	1,131,899	1,066,972	6.1
Fixed Cable Modem Subscribers	201,433	188,541	6.8
Other Fixed Data Subscribers (e.g. Radio)	2,295	958	139.6
Total Subscriptions	**1,857,574**	**1,718,679**	**8.1**

Source: CA, Operators' Returns, Provisional data for Telkom Kenya Ltd

2.5 Fixed Data and Broadband Subscriptions

Data/internet subscriptions increased across all speed bands during the quarter under review, with internet speeds between 10 and 30 Mbps recording the highest number of subscriptions, followed by the 2 to 10 Mbps band.

Table 11: Narrowband and Broadband Subscriptions by speed

Internet Technology/Speeds	*<256Kbps*	*=>256Kbps < 2Mbps*	*=>2<10 Mbps*	*=>10<30 Mbps*	*=>30<100Mbps*	*=>100 Mbps <1Gbps*	*=>1Gbps*
Cable Modem	-	-	24,002	171,192	6,050	189	-
Copper (DSL)	4	7	126	-	-	-	-
FTTH	-	3,660	233,361	492,936	163,408	142,259	10
FTTO	1	4,504	12,294	33,832	24,484	20,623	527
Fixed Wireless	24,236	10,733	402,027	26,989	39,160	1,190	-
Satellite	4	116	8	114	-	17,231	2
Other Fixed	-	110	1,199	734	220	32	-
Totals	24,245	19,130	673,017	725,797	233,322	181,524	539

Source: CA, Operators' Returns, Provisional data for Telkom Kenya Ltd,

2.6 Fixed Data Subscriptions by Operator

Table 12 shows the top ten fixed Internet service providers by the number of subscriptions recorded as of 31st March 2025.

Table 12: Top 10 Operators by Fixed Internet Subscriptions

Service Provider/Indicator	*Number of Data Subscriptions*	*Percentage Market Share (%)*
Safaricom PLC	678,118	36.5
Jamii Telecommunications Ltd	418,309	22.5
Wananchi Group (Kenya) Ltd*	267,812	14.4
Poa Internet Kenya Ltd	261,491	14.1
Vilcom Network Limited	71,693	3.9
Mawingu Networks Ltd	59,002	3.2
Dimension Data Solutions East Africa Ltd	18,890	1.0
Starlink Internet Services Kenya	17,066	0.9
Liquid Telecommunications Kenya	16,424	0.9
Vijiji Connect Ltd	14,225	0.8
Other Fixed Service Providers	34,544	1.9

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

2.7 International Bandwidth

The total available international Internet bandwidth remained the same since both submarine and satellite providers did not light additional capacity. Similarly, utilized undersea bandwidth was the same as that consumed last quarter. However, satellite internet capacity grew by 32.7 per cent mainly driven by capacity consumed by Starlink Kenyan customers.

Table 13: International Internet Bandwidth (Gbps)

Indicator/ Period	*Jan-Mar 25*			*Oct-Dec 24*		*Quarterly Variation (%)*
Total Available (Lit/Equip) Bandwidth Capacity (Gbps)			**22,154.438**		**22,154.438**	**0.0**
Undersea Bandwidth Capacity	**SEACOM***		6,850.000	**SEACOM**	6,850.000	0.0
	TEAMS		4,063.000	**TEAMS**	4,063.000	0.0
	Telkom Kenya*	***EASSY***	6,420.000	***EASSY***	6,420.000	0.0
		Lion 2	810.000	***Lion 2***	810.000	0.0
		DARE 1	1,780.000	***DARE 1***	1,780.000	0.0
		PEACE	2,231.000	***PEACE***	2,231.000	0.0
Satellite Bandwidth Capacity			0.438		0.438	0.0
Total Utilized Bandwidth Capacity (Gbps)						
Undersea Bandwidth Capacity	***Sold In Kenya***	***Sold in other Countries***		***Sold In Kenya***	***Sold in other Countries***	***Quarterly Variation (%)***
	12,526.040	2,953.820		12,526.040	2,953.820	0.0
Satellite Internet Capacity			45,288,880.000		34,141,040.438	32.7

*Source: CA, Operators' Returns, *Provisional Data for TKL and SEACOM*

3. POSTAL AND COURIER SERVICES

3.1 Designated Postal Operator (PCK) Traffic

Table 14 illustrates the volume of local and international items sent through PCK .

Table 14: Postal Items

Indicator/Period		*Jan-Mar 25*	*Oct-Dec 24*	*Quarterly Variation (%)*
Letters	Domestic	145,627	815,075	-82.1
	International Outgoing	14,727	6,708	119.5
	International Incoming	23,435	500,263	-95.3
Parcels	Domestic	161,331	641,262	-74.8
	International Outgoing	111,850	19,369	477.5
	International Incoming	108,416	324,671	-66.6

Source: CA, Operators' Returns

3.2 Courier Traffic

Domestic letters and parcels delivered through licensed private courier operators declined by 6.0 percent and 25.5 percent, respectively. On the other hand, all outgoing and incoming letters and

parcels recorded growth, except for international incoming parcels, which declined by 5.9 percent from 206,369 volumes recorded in the previous quarter, as shown in Table 15.

Table 15: Courier Items

Indicator/Period		*Jan-Mar 25*	*Oct-Dec 24*	*Quarterly Variation (%)*
Letters	Domestic	764,948	813,741	-6.0
	International Outgoing	23,506	15,502	51.6
	International Incoming	39,540	35,088	12.7
Parcels	Domestic	2,762,007	3,706,664	-25.5
	International Outgoing	24,638	22,927	7.5
	International Incoming	194,148	206,369	-5.9

Source: CA, Operators' Returns

4. BROADCASTING SERVICES

4.1 Subscription to Broadcasting Services

As illustrated in Table16, subscriptions to broadcasting services rose by 1.5 percent to record 6.2 million during the quarter. Subscriptions to Digital Terrestrial Television, Direct-to-Home, and cable services increased by 0.2 percent, 3.9 percent, and 31.5 percent, respectively.

Table 16: Broadcasting Subscriptions

Indicator/Period		**Mar-25**	*Dec-24*	*Quarterly Variation (%)*
DTT	Go TV	2,835,399	2,824,896	0.4
	Star Times	1,710,642	1,710,029	0.0
	Sub-Total	**4,546,041**	**4,534,925**	**0.2**
DTH	Azam	28,258	28,190	0.2
	MultiChoice (DSTV)	1,242,238	1,224,623	1.4
	Star Times	192,241	186,587	3.0
	Wananchi (Zuku)	193,105	154,837	24.7
	Sub-Total	**1,655,842**	**1,594,237**	**3.9**
Cable	Cable One	1,296	1,333	-2.8
	CTN (MSA)	2,579	2,571	0.3
	Wananchi (ZUKU)	78,832	58,792	34.1
	Hirani	758	758	0.0
	Wadani Cable	95	95	0.0
	Sub-Total	**83,560**	**63,549**	**31.5**
Total		**6,285,443**	**6,192,711**	**1.5**

Source: CA, Operators' Returns

5. FREQUENCY SPECTRUM MANAGEMENT

The number of microwave links assigned by the Authority for deployment increased by 1.9 percent whereas assigned FM sound broadcasting frequencies dropped by 1.9 percent as shown in Table 17.

Table 17: Frequency Spectrum Management

Indicator/Period	*Jan-Mar 25*	*Oct-Dec 24*	*Quarterly Variation (%)*
Assigned Microwave Links for Deployment	11,458	11,249	1.9
FM Sound Broadcasting Frequencies Assigned	1,035	1,055	-1.9

Source: CA

6. ELECTRONIC TRANSACTIONS AND CYBER SPACE MANAGEMENT

6.1 Registered Domain Names

Overall, the total number of users registered to .KE domain increased by 1.0 percent from 108, 154 to 109,251 recorded in the quarter under review. Personal websites and E-mail users registered to ME.KE sub-domain reduced by 89.5 percent from 3,462 recorded in the previous quarter as shown in Table 18.

Table 18: .KE Domains

SUB-DOMAIN	*USER*	*Number of Users*		
		Mar-25	*Dec-24*	*Quarterly Variation (%)*
Total		**109,251**	**108,154**	**1.0**
CO.KE	Companies	96,857	92,669	4.5
.KE	Second level	6,559	6,458	1.6
OR.KE	Non-Profit-Making Organizations	2,059	2,116	-2.7
AC.KE	Institutions of Higher Education	1,330	1,315	1.1
SC.KE	Lower and Middle-Level Institutions	1,025	1,031	-0.6
GO.KE	Government Institutions	838	823	1.8
ME.KE	Personal Websites and E-mail	362	3,462	-89.5
INFO.KE	Information	138	201	-31.3
NE.KE	Personal Websites and E-mail	55	51	7.8
MOBI.KE	Mobile Content	28	28	0.0

Source: Kenic

6.2 National Cyber Space Landscape

The number of cyber threats detected during the quarter increased by 201.7 percent to 2.5 billion from 840.9 million threats reported last quarter. A total of 13.2 million advisories were issued in

response to the cyber threats detected, representing a 14.2 percent increase compared to 11.6 million advisories issued last quarter.

Table 19: Cybersecurity Landscape

Indicator/Period	*Threats and Advisories*	*Jan-Mar 25*	*Oct-Dec 24*	*Quarterly Variation (%)*
Threats	Malware	24,549,413	33,920,406	-27.6
	Brute Force Attacks	33,794,288	34,784,028	-2.8
	Web Application Attacks	5,081,236	4,542,939	11.8
	System Vulnerabilities	2,470,257,079	752,441,233	228.3
	Mobile Application Attacks	68,063	138,175	-50.7
	DDOS	3,678,789	15,095,217	-75.6
	Total Cyber Threats	**2,537,428,868**	**840,921,998**	**201.7**
Advisories	Malware	428,974	404,598	6.0
	Brute Force Attacks	1,653,920	1,279,310	29.3
	Web Application Attacks	4,402,724	4,445,334	-1.0
	System Attacks	5,951,881	5,146,931	15.6
	Mobile Application Attacks	13,239	8,215	61.2
	DDOS	776,772	300,193	158.8
	Total Cyber Advisories	**13,227,510**	**11,584,581**	**14.2**

Source: National KE-CIRT/CC

7. CONCLUSION

The ICT sector in Kenya demonstrated steady growth during the period between January to March 2025. The quarter was marked by a general growth in active mobile subscriptions, mobile money subscriptions, mobile data and broadband subscriptions mainly driven by effective customer retention campaigns. Notably, there was an increased uptake in both smart and feature phones which can be attributed to the increased availability of mobile devices and expansion of mobile network infrastructure across the country. Overall, the sector's expansion highlights a positive trend towards greater connectivity and digital adoption across the country.