ESWATINI COMMUNICATIONS COMMISSION

ESCCOM

INFORMATION AND COMMUNICATION TECHNOLOGY SECTOR REPORT

2025

KINGDOM OF ESWATINI

Vision

To be an agile, collaborative enabler of a converged and secure digital Eswatini

Mission

To enable a sustainable, secure and inclusive digital Eswatini ecosystem that fosters fair competition, innovation, collaboration, high-quality and affordable services to derive meaningful, socio-economic benefits for all

Values

- Integrity
- Transparency
- Accountability
- Teamwork
- Innovation
- Knowledge

Acronyms

ADSL	Asymmetric Digital Subscriber Line
AI	Artificial Intelligence
BTS	Base Transceiver Stations
CBE	Central Bank of Eswatini
CIRT	Computer Incident Response Team
CRASA	Communications Regulators' Association of Southern Africa
CSO	Central Statistics Office
DSL	Digital Subscriber Line/Loop
EPTC	Eswatini Posts and Telecommunications Corporation
ESCCOM	Eswatini Communications Commission
ESM	Eswatini Mobile
FNOs	Fixed Network Operators
FTE	Full-Time Equivalent
FWA	Fixed Wireless Access
FY	Financial Year
GDP	Gross Domestic Product
ICT	Information and Communication Technology
IMT	International Mobile Telecommunications
ISDN	Integrated Services Digital Network
ISPs	Internet Service Providers
ITU	International Telecommunications Union
LDCs	Least Developed Countries
LLDCs	Landlocked Developing Countries
LTE	Long Term Evolution networks / 4G
MNOs	Mobile Network Operators
MTN	Mobile Telephone Network
NRA	National Regulatory Authority
OTTs	Over-the-Top Technologies
PSTN	Public Switched Technology Network
SADC	Southern African Development Community
SIM Card	Subscriber Identity Module
SMMEs	Small Medium and Micro Enterprises
SMS	Short Message Service
ESWASA	Eswatini Standards Authority
SZL	Swaziland Lilangeni
UAS	Universal Access and Service
UNDP	United Nations Development Programme
USD	United States Dollar
VoIP	Voice-over-Internet Protocol
WLL	Wireless Local Loop

FOREWORD FROM THE CHIEF EXECUTIVE

Mvilawemphi Dlamini

The Eswatini Communications Commission (ESCCOM) plays a leading role in regulating, developing and enabling the Information and Communications Technology (ICT) sector. ESCCOM remains committed to creating a regulatory environment that fosters innovation, competition, investment, and economic diversity within the framework of comprehensive digital transformation impacting various sectors within the Kingdom of Eswatini.

I am pleased to present the Information and Communications Technology Sector Report 2024/25, a testament to our ongoing commitment to fostering a robust and innovative digital landscape for our nation. The digital economy is evolving at an unprecedented pace, presenting both significant opportunities and complex challenges that require agile and forward-thinking regulatory responses. Our key mandate at ESCCOM is to ensure the coherent and unified deployment and management of ICTs across the public service and to support the growth of the entire ICT sector. This involves setting and enforcing standards, fostering secure and efficient digital infrastructure, and promoting a regulatory environment that encourages both innovation and inclusive access to digital services.

The ICT Sector Report 2024/25 delves into key trends in digital transformation, highlighting our strategic focus on fostering inclusive access i.e. bridging the digital divide by supporting innovative technologies and partnerships to reach underserved communities. In executing these tasks, we are cognisant of adapting our regulatory frameworks to ensure our regulations are flexible and responsive to rapidly changing technologies, business models and market structures. The Commission further thrives to enhance the cybersecurity and data protection agendas by ensuring

collaborations with stakeholders to establish effective data-driven strategies against online threats, thereby ensuring digital trust.

The success of our initiatives hinges on strong collaboration between government, private sector operators, civil society and international partners. This report serves as a critical resource to facilitate meaningful discussions and coordinated actions, enabling us to collectively navigate the complexities of digital transformation and unlock the full potential of digital opportunities for all our citizens. Promoting digital literacy through equipping citizens with the skills necessary to thrive in a digital-first world is vital. Against this backdrop, this report aims to offer insights that inform decisions to enhance digital connectivity.

Measuring the Digital Economy

The Commission has placed critical focus on driving the adoption of ICTs and their impact on economic growth. Through the collection and analysis of the sector specific indicators, the digital economy is monitored and measured to derive meaningful impact for the ordinary citizen and enhance the standard of living. In the period under review, ICT sector trends demonstrated an impressive performance, continuing from the growth momentum experienced in the previous year.

Mobile cellular SIM subscriptions improved by 11%, chiefly due to the acquisition of multiple SIM cards by subscribers, supported by expansion in mobile cellular network coverage, thereby extending mobile cellular SIM penetration to 143% of the population. Similarly, Mobile broadband SIM subscriptions grew by 13.5%, leading to a higher Mobile broadband penetration of 118%. The demand for mobile broadband connectivity persisted, leading to accelerated rates of digital transformation. ICTs are thereby changing society, improving service delivery and fostering innovation, while impacting all spheres of society.

Infrastructure and Connectivity

Telecommunication operators continued with the rollout of network infrastructure and efforts to bridge the digital divide. Digital technology provides pathways to overcome physical barriers, facilitating access to education, healthcare and trade. It serves as a catalyst for resilience, empowering countries to effectively respond to crises and to engage more fully in the global economy. The 2G network improved by 5.8% to 765 sites, extending geographic coverage to 92% and population coverage to 99%. Network sites for 3G grew by 5.8% to 766, with geographic coverage moving to 95.1%, and population coverage growing to 99.1%. For the 4G technology, sites increased by 5.8% to 766, with geographic coverage improving to 90.5%, reaching 95.3% of the population.

Cost of Communication

With the consumer purse already stretched due to inflationary pressures leaving consumers with less disposable income, the Commission continued with efforts to lessen the cost of communication. This was done to enable the economy to thrive, as digital technologies are at the core of the country's development agenda. MTN reduced its out of bundle rate from E0.49 to E0.25 per megabyte, while both Eswatini Mobile and MTN offered the same out-of-bundle rate for data as at close of reporting period. Further, the country got closer to attaining Target 2 of the UN Broadband Commission's goal, which requires that entry-level broadband services should cost less than 2% of monthly gross national income per capita. The target was met on three (3) Baskets, which are the: Fixed Broadband 5GB Basket; Mobile Data and Voice Low Consumption Basket; and the Mobile Cellular Low Usage Basket. In addition, Eswatini ranked 2nd most affordable country in the SADC region on the Fixed Broadband (5GB) basket, after Mauritius.

Cybersecurity and Data Protection

The surge of new technologies creates novel vulnerabilities that require robust security measures against attacks. Digital safety and trust remain a critical aspiration of the country as consumers engage in online activities. The importance of legislative frameworks cannot be emphasized. Partnerships are important in this aspect. As such, national cybersecurity efforts were harnessed through stakeholder consultations, where the Commission emphasized the role of collaborations to develop policies and frameworks.

Accordingly, the Cybersecurity Agency successfully secured funding from the Foreign, Commonwealth and Development Office (FCDO) under the British government to develop cybersecurity standard operating procedures for law enforcement and judiciary. The purpose of the grant is to enhance Eswatini's capacity to investigate cybercrime, and

collect, preserve, and present digital evidence.

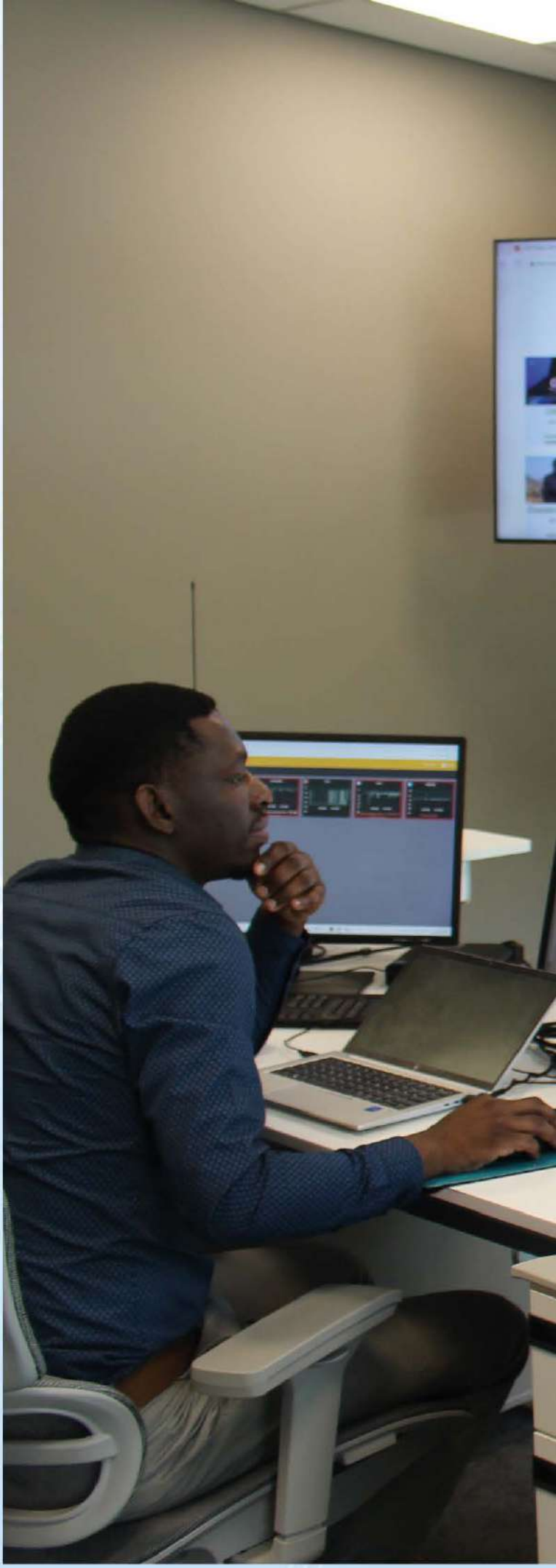
More significantly, the Eswatini Data Protection Authority (EDPA) commenced development of a comprehensive five-year strategy to guide its operations from 2025 to 2030. This strategic plan will involve stakeholder consultations, data analysis, and the identification of key objectives to align with regulatory and technological changes. Effort will be made to ensure the strategy addresses the needs of organizations and promotes a culture of compliance in data protection practices.

Emerging Technologies

In leveraging sustainable development and economic growth, emerging technologies are seen as a key tool to support the UN's Sustainable Development Goals. The goal is to leverage new digital talent and innovation to move beyond traditional industries and build knowledge-based economies. Adaptive regulatory frameworks, agile governance, forward-looking strategies and smart policies guiding the sector will be critical in this pursuit. Regulators need to shift to more agile, adaptive models to keep pace with rapid technological changes with focus placed on societal impact and the responsible use of technology.

In this regard, the Commission shall therefore be undertaking the State of ICT Sector Study in the ensuing period, to scan the market for evolving trends. The study shall scope three markets (Telecommunications, Broadcasting and Postal & Courier markets). Focus will be to: Establish a comprehensive baseline of the telecommunications sector to inform regulatory, investment, and policy decisions; Provide a baseline assessment of the broadcasting sector's structure, capacity, and regulatory alignment to support inclusive access and content diversity; and Establish a baseline of the postal and courier services sector to support modernization, regulatory reform, and integration with digital commerce.

Grounded on the assumptions of increased demand for ICT services, the sector is assured to keep growing into the probable future. The Commission shall ensure effective regulation and enablement of the sector to hasten digital transformation for inclusive economic development. I commend this report to all stakeholders as a vital tool for guiding our collective journey toward a more secure, efficient, and inclusive digital future for our nation. I thank you.

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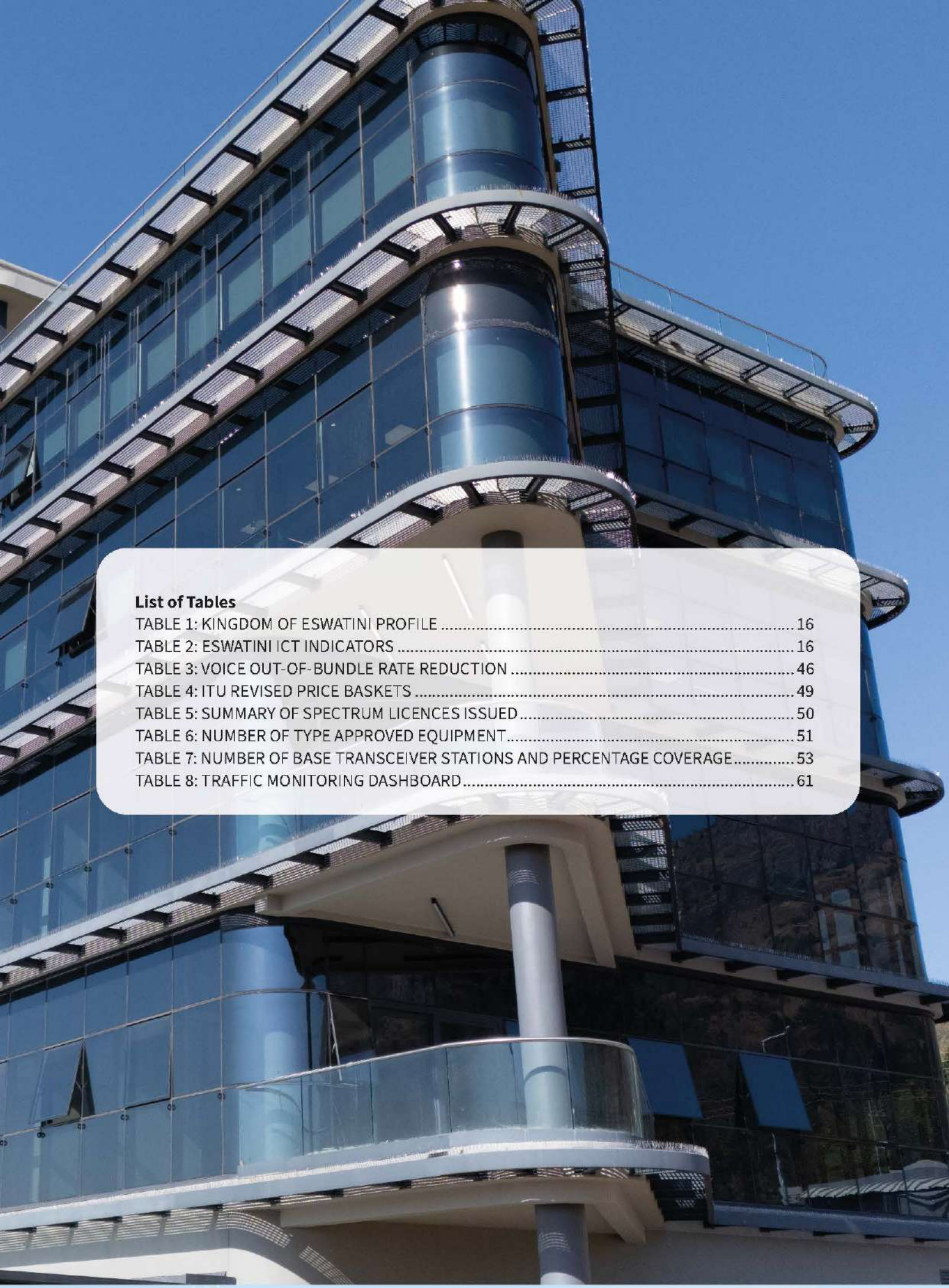

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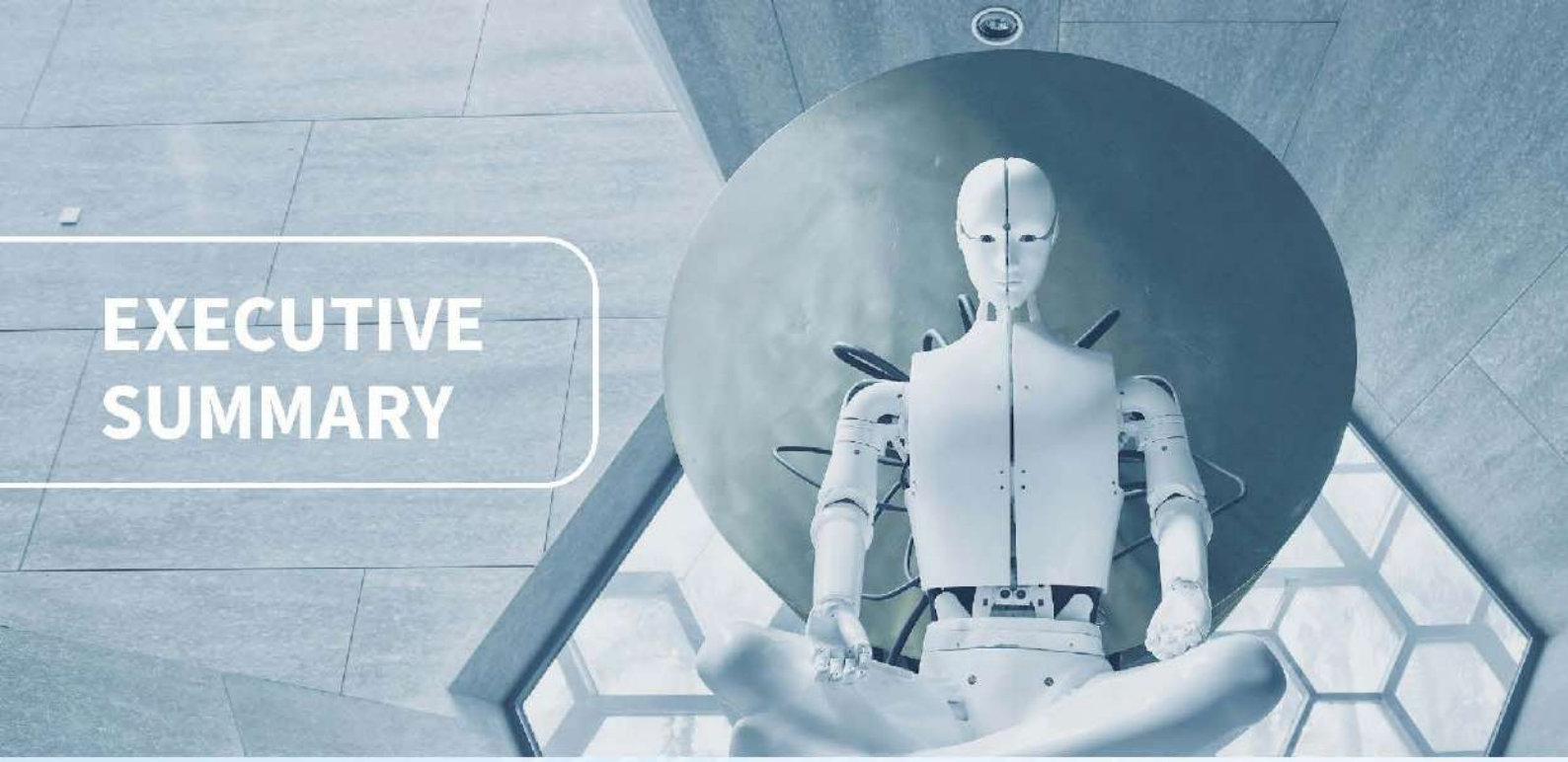

EXECUTIVE SUMMARY

Significant improvement in the Information and Communication Technology (ICT) sector performance was observed in the period under review, sustaining the momentum experienced from the previous reporting period. Mobile cellular subscriptions grew by 11% to 1,742,213, principally credited to multiple SIM card acquisition by subscribers, supported by extension in mobile cellular network coverage through infrastructure investments by operators. Consistently, mobile broadband subscriptions surged by 13.5% to 1,432,996. Inevitably, mobile cellular penetration extended, by 12% to 143 % with mobile broadband penetration similarly expanding by 13% to 118%. Fixed telephone subscriptions declined by 13% to 35,000 with Fixed broadband subscriptions also decreasing by 3% to 32,744. Resultantly, fixed broadband penetration decreased to 2.69%.

Telecommunications revenue increased by 6% to E2,708,107,594 (E2.7 billion), largely driven by strong performance from both Mobile Network Operators (MNOs) and Fixed Network Operators (FNOs). MNOs revenue rose by 5%, reaching E2,338,122,162 while FNOs revenue increased by 5.9% to E369,985,432. Telecommunications employment grew by 0.3% to 957. MNO's employment declined by 7% to 266 while FNOs employment increased by 3% to 691. A combination of factors led to the reduction of MNOs employment, such as companies' strategic restructuring, natural attrition and retirement.

Further, postal sector revenues continued an upward trend, rising by 47% to E44,745,064 despite a sustained decline in demand for traditional postal mail services. The growth was primarily driven by the expansion of agency service revenues, particularly from electricity sales transactions, which continue to benefit from the extensive nationwide postal branch network. Domestic Mail volumes (consisting of sent and received, registered and unregistered letters) plunged by 21.8% to 511,301 while International Mail volumes (outbound and inbound) also declined, by 34% to 367,394.

International Packets and Parcels mail volumes (outbound and inbound) showed strong signs of recovery, reflecting improvements in cross-border mail supply chains compared to previous financial years, as they increased by 38%, rising to 19,825. The number of Postal boxes rented dropped by 12% for a successive year to 10 628.

Broadcasting revenues improved by 13.6% to E24,831,168. The number of broadcasting productions grew slightly by 2.6% to 10,847. Employment statistics reveal that broadcasting sector personnel increased by 12.4% to 417, where radio employment grew by 8.6% to 176, while Television employment improved by 15.3% to 241. Radio coverage stands at 95% while Television (TV) coverage is at 86%.

The mobile phone/cellular penetration rate shows the number of SIM cards used in each country. The data is presented as a percantage and thus may exceed 100% if the number of SIM cards in the country is higher than the actual population number

INTRODUCTION

01

Governments and their National Regulatory Authorities (NRAs) today have the greatest of responsibilities in ensuring universal and meaningful connectivity, and sustainable finance for digital development projects to support digital transformation of economies. These shall ensure countries are able to meet the goals of national digital agendas and ultimately, Sustainable Development Goals (SDGs) at the heart of the United Nations 2030 Agenda for Sustainable Development. This undertaking involves a transformation of policy-making processes, governance models and new channels for policy implementation.

As digital technologies have become more widespread, policy and regulation have shifted focus from the narrow communications sector to powering the digital transformation across the economy. The baseline for effective regulation has changed, and so too have the tools used to measure and report on the progress of countries towards their digital transformation aspirations.

Accordingly, this report presents various analyses which seek to demonstrate the impact of regulation on the growth and uptake of digital technologies in the Kingdom of Eswatini, with insights into the transformative effects of such uptake in key economic sectors.

1.1 BACKGROUND

The Annual Information and Communication Technology Sector report presents the performance and improvement in the Electronic Communications Sector, focusing largely on the Telecommunications, Broadcasting, Postal and Courier Markets. The report recounts initiatives undertaken over the 2024/25 Financial Year (FY) to advance and enable the sector. It provides an updated account on the performance of the ICT sector to assist stakeholders make informed decisions based on verifiable data and statistics.

The report analyses Telecommunications, Broadcasting, and the Postal and Courier markets detailing subscriptions, penetration, coverage, revenue, and employment, amongst other economic indicators. Supply-side market data collected from licensees is used to track trends in the indicators. The outcome of this analysis is based on collected micro-level data, as well as macroeconomic drivers that expound observed patterns at national level. Additionally, current market dynamics and limitations requiring redress in the sector are examined.

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

Users of the report should note that the figures presented have been rounded off to the nearest decimal. Owing to the rounding of figures, the sum of separate items will sometimes differ in the final digit from the total shown. Data in the tables and figures are subject to revision from time to time as more current information becomes available.

02 OVERVIEW OF GLOBAL ICT DEVELOPMENTS

2.1. GLOBAL CONNECTIVITY

Mobile connectivity continues to play a critical role in driving digital technology, as it enables a broad range of transformative technologies while supporting governments in bringing constructive social impact. The International Telecommunication Union (ITU)'s global ICT trends 2024 highlight increased global internet use to 5.5 billion people, but with significant digital divides remaining, especially for low-income countries and Least Developed Countries (LDCs). The ITU highlights progress was made in making ICTs affordable in the review period, although fixed broadband remains a challenge. The ITU's Facts and Figures 2024 report shows 68% of the global population is online, but the digital gap between high and low-income countries is evident, hindering access to education, information, and employment.

2.2. KEY TRENDS IN THE ICT SECTOR

Key trends in the sector over period include increasing connectivity, with more than half the global population being online in 2024. However, about one-third of the world remains offline. Persistent digital divides in connectivity continue between high-income and low-income countries, impacting opportunities for the most vulnerable. Despite that, improvements in affordability were noted. Significant progress was made in ensuring ICT services, particularly mobile broadband becomes more affordable, with more economies able to meet some of the broadband targets. However, fixed broadband remains largely unaffordable for many in low-income economies. The 2024 ITU ICT Development Index (IDI) showed the most prominent improvement was observed in low-income economies.

Nonetheless, universal connectivity remains a challenge for Least Developed Countries (LDCs) and Landlocked Developing Countries (LLDCs), with only 35% and 39% of the population online, respectively. Further, while progress has been made, gender parity has decreased in the LDCs group, and the correlation between gender parity and overall Internet use remains a concern in some regions, widening the gender digital divide. On smart city progress, cities worldwide are evaluating their advancement toward smart city objectives, indicating a growing focus on leveraging ICT for urban development.

KINGDOM OF ESWATINI ICT PROFILE

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3.1. COUNTRY PROFILE

Several economic and connectivity indicators exhibited growth in the reporting period, credited to the sustained demand for broadband services and universal meaningful connectivity. The country observed progress towards the attainment of national and global targets, such as the contribution to the National Development Plan 2023 – 2028 and the UN Sustainable Goals focusing on building resilient infrastructure, promoting sustainable industrialization, and fostering innovation. Driven by the momentum experienced in the previous reporting period, the ICT sector continued an upward trajectory to record positive movements in the review year. A snapshot of the country's ICT profile, presenting the level of progress within the Kingdom is shown in the tables below.

Table 1: Kingdom of Eswatini Profile

INDICATOR	Eswatini
Population - Estimate	1,217,041
Urban Population	24%
Rural Population	76%
Male Population	49%
Female Population	51%
Age Group (6-18)	41%
Average Household Size (# of persons)	4
Total Number of Households	272,824
Land Area (km2)	17,350
Density (/km2)	68
Gross Domestic Product (GDP) per Capita (US$, Billion)	$3,936
Literacy Rate (%)	95%

Source: CSO, 2024

In terms of the base ICT indicators in the Kingdom, Eswatini has over twenty-four thousand (24,000) Fixed Telephone Lines, being accessed by 0.02 of the population per 100 inhabitants. About 94.7% of the population is covered by a mobile cellular telephone network. In every 100 inhabitants, there are 120 people subscribed to the broadband internet network, both fixed and mobile. A comprehensive list of the indicators is presented in Table 2.

Table 2: Eswatini ICT Indicators

INDICATOR	STATISTIC
FIXED TELEPHONY	
Fixed Telephone Lines	24,066
Fixed Telephone Lines per 100 Inhabitants	0.02
MOBILE TELEPHONY	
Number of Mobile Cellular Connected Subscribers	1 742 213
Active Mobile Cellular Subscribers per 100 Inhabitants	143
% Population Covered by a Mobile Cellular Telephone Network	94.7%
AFFORDABILITY OF ICT SERVICES	**USD ($)**
Mobile cellular – price of a one-minute local call (peak, to fixed)	0.06
Mobile cellular – price of a one-minute local call (peak, on-net)	0.06
Mobile cellular – price of SMS (on-net)	0.02
Mobile cellular – price of SMS (off-net)	0.02
Price of 1GB data	3.44
INTERNET AND BROADBAND	
Fixed Broadband subscribers - Download speeds > 1Mbit/s	32,744
Mobile Broadband Subscribers - Download speeds > 1Mbit/s	1 432 996
Total Broadband (Fixed Broadband + Mobile Broadband) Internet subscribers	1,465,740
Total Subscribers per 100 Inhabitants	120
Total International Outgoing Internet bandwidth (Mbit/s)	48,564
Total International Incoming Internet bandwidth (Mbit/s)	67,150
Proportion of households with Internet access	67%

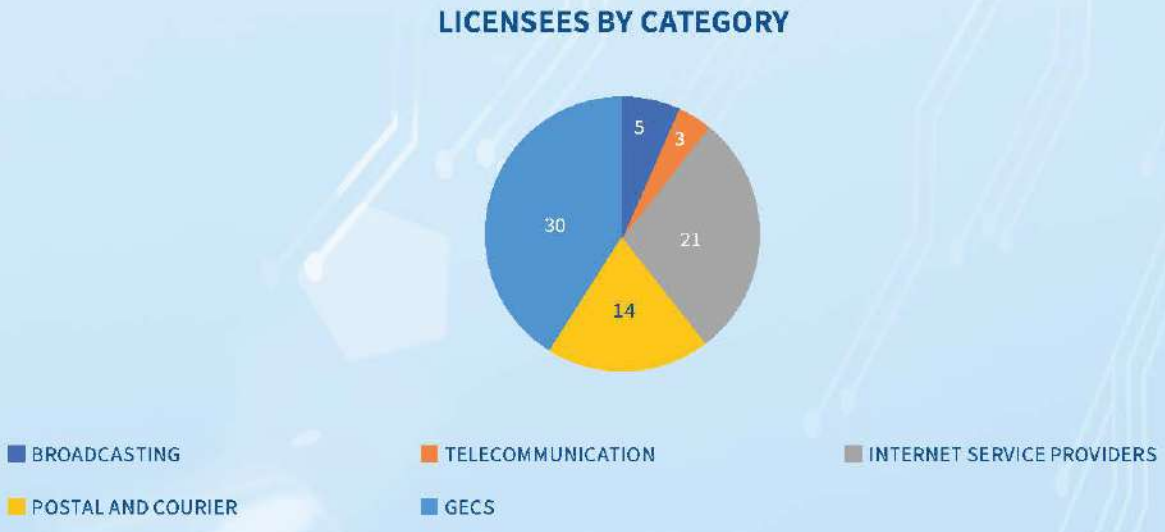
RADIO BROADCASTING	
Total Number of Public Broadcasting Radio Licences	1
Total Number of Commercial Broadcasting Radio Licences	0
Total Number of Community Broadcasting Radio Licences	3
Number of Public Broadcasting Radio Licences Operational	1
Number of Commercial Broadcasting Radio Licences Operational	0
Number of Community Broadcasting Radio Licences Operational	2
Number of transmission sites for radio	16
Proportion of households with a radio	46.7%
TELEVISION BROADCASTING	
Number of Subscription Television Licences	0
Number of Free-to-Air Television Licences	2
Number of Subscription Television Licences Operational	0
Number of Free-to-Air Television Licences Operational	2
Number of Digital Satellite Stations	0
Number of Digital Terrestrial Stations	18
Number of Analogue Terrestrial Stations	0
Number of Signal Distributors	1
Number of Content Distributors	2
Number of set-top boxes	35,000
Proportion of households with a TV	54.5%
POSTAL INFRASTRUCTURE	
Total Number of Postal Service Points	53
% Postal Service Points located in Rural Areas	43
Total Number of Postal Facilities not open to the Public (Sorting centres excluding delivery offices)	1

ACCESS TO POSTAL SERVICES	
Total Number of Post Office Boxes (P.O. Boxes)	41,150
Proportion of mail delivered through P.O. Box or Postal Service Point Counter	95%
Proportion of mail delivered directly to the home or business premises	5%
Proportion of the population that is excluded from postal delivery	32.73%
Presence of innovative solutions to extend access to mail delivery (e.g., automated parcel lockers, SMS notification-based delivery, etc.)	SMS notification, Mobile app, Online Tracking
POSTAL INTERNET CONNECTIVITY	
Permanent Post Offices with Internet Connectivity	36%
Permanent Post Offices providing public internet access points	15%
Permanent Post Offices using automation systems	97.30%
Number of Post Offices offering government services	36

Source: ESCCOM, 2025

In terms of licensees in the ICT sector, Eswatini has seventy-three (73) licensees operating in the market. These consist of five (5) broadcasters, three (3) telecommunications operators, twenty-one (21) Internet Service Providers (ISPs) and fourteen (14) postal and courier service providers. Further, there are thirty (30) licensees in the category of General Licences for the Importation, Installation, Maintenance, Distribution and Sale of Electronic Communications Equipment, normally referred to as General Electronic Communication Services (GECS) licensees. Figure 1 depicts the various licensees by category.

Figure 1: Total Number of Licensees in the ICT Sector



Source: ESCCOM, 2025

3.2. INTERNET BROADBAND USAGE

3.2.1 Global Internet Usage

Regarding global internet use statistics, 5.5 billion people were online in 2024 . This statistic represented 68% of the world population, compared with 65% one year earlier. The year-on-year growth rate is increasing, from 2.7% one year ago to 3.4% in this reporting year. However, the same figure tells us that 2.6 billion people, one-third of the global population, are still offline. Universal connectivity remains a distant prospect.

Internet use remains tightly linked to the level of development in a country. In high-income countries, 93% of the population use the internet, approaching universality. This contrasts starkly with the situation in low-income countries, where only 27% of the population is online.

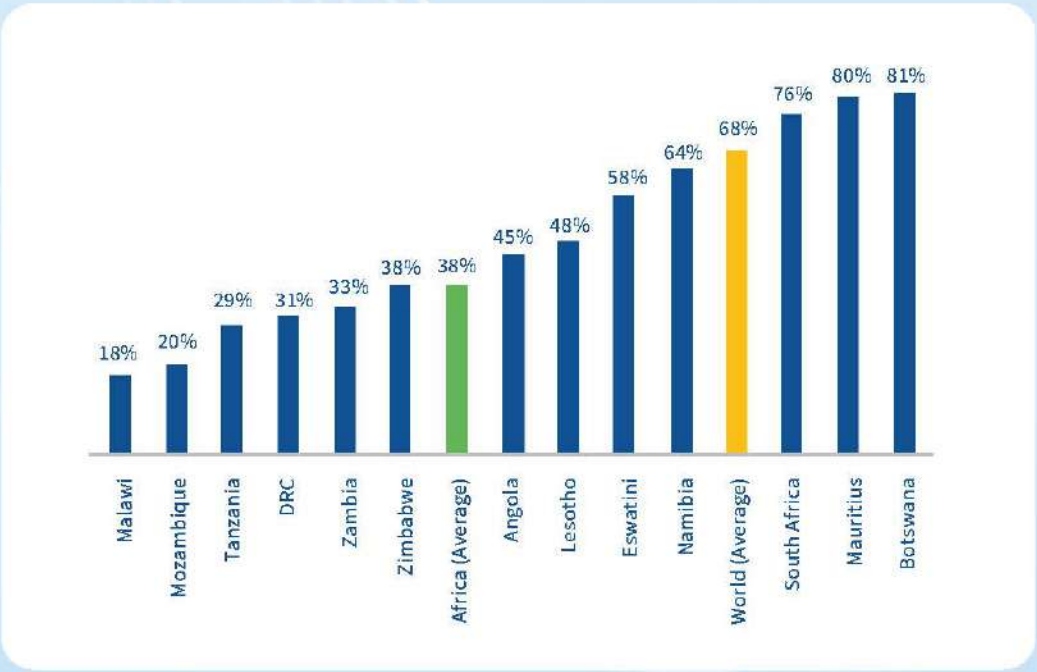
3.2.2 Individuals Using the Internet

Access to the internet can be any type of connection, including fixed broadband, mobile broadband, and narrowband. The ITU defines the indicator of: Individuals Using the Internet - as the proportion of individuals who used the Internet from any location in the last three months. It is through such access that people can participate in the digital economy, obtain information and engage in online activities.

This indicator is important especially for developing countries since it reflects a nation's digital inclusion, access to essential services, and economic opportunities, highlighting disparities and the need for equitable development. Widespread internet access is therefore a known driver of digital transformation, which is correlated to a region's level of development.

In the SADC regional context, Eswatini features in the top five countries with the highest percentage of individuals using the internet at 58%, after Botswana – 81%, Mauritius – 80%, South Africa – 76%, and Namibia at 64%.

Figure 2: Percentage of Individuals Using the Internet



Source: ITU, 2024

ITU Facts and Figures 2024

The Eswatini government, therefore, continues to pursue projects to bring the unconnected online for universal meaningful connectivity. Universal and Meaningful Connectivity (UMC) - defined as the opportunity for everyone to have a safe, satisfying, enriching, and productive online experience at an affordable cost, has emerged as the new imperative. Land Locked Developing Countries (LLDCs) are at various stages in their journey toward UMC, yet they share common obstacles and can benefit from mutual learning.

Infrastructure development is part of the solution; however, robust policy frameworks that promote investment, adoption, and innovation in ICTs are equally vital. Achieving UMC may take time, but decisive and focused interventions, including regulatory improvements, can lead to rapid and substantial gains. Digital technology provides LLDCs with pathways to overcome physical barriers, facilitating access to education, healthcare, and trade. It serves as a catalyst for resilience, empowering countries to effectively respond to crises and to engage more fully in the global economy.

PERFORMANCE OF THE ESWATINI ELECTRONIC COMMUNICATIONS SECTOR

04

TELECOMMUNICATIONS MARKET PERFORMANCE

Eswatini's telecommunications sector experienced steady growth in the review period, with mobile cellular SIM subscriptions rising by 11% to 1.74 million and mobile broadband subscriptions increasing by 13.5% to 1.43 million, driving penetration rates to 143% and 118%, respectively. Despite this, fixed telephone subscriptions declined by 13% due to copper theft, and total fixed broadband subscriptions fell by 3%, driven by a sharp 47% drop in fixed-wired connections, although fixed-wireless broadband grew by 15%.

Fixed Wireless Access (FWA) remains the dominant form of fixed broadband due to its cost-effectiveness and reliance on existing mobile infrastructure. The market remains moderately concentrated, with five out of fifteen (5 over15) licensees holding over 90% of subscriptions. Domestic voice traffic rose by 12% due to competitive bundles, while international and roaming voice traffic declined by 2% and 18%, respectively, largely due to the growing use of OTT services, despite increased international travel. Overall, industry revenue grew by 6% to E2.71 billion, driven by strong performance from both mobile and fixed network operators.

4.1. MOBILE NETWORK CONNECTIVITY

Globally in 2024, there were 112 mobile-cellular subscriptions per 100 inhabitants and 95 mobile broadband subscriptions. Mobile broadband subscriptions have almost caught up with mobile-cellular subscriptions, following a period of rapid growth. In the past five years, annual growth for mobile broadband subscriptions has averaged 5%, almost five times the rate for mobile-cellular subscriptions at 1.1%. This can be explained by the evolution of consumption patterns towards data-based services and the phasing out of cellular-only services and offers. At 9.1 billion, the number of mobile-cellular subscriptions exceeds the total world population by 12.1%. In high-income countries, there are about 138 mobile-cellular subscriptions per 100 inhabitants, almost twice the level in low-income countries (71 subscriptions per 100 inhabitants).

4.1.1. Mobile Market Subscriptions

Mobile cellular telephone SIM subscriptions in Eswatini grew by 11% to 1,742,213 active sim subscriptions from 1,576,465. Market penetration, being the number of active SIMs expressed as a percentage of the national population, consequently continued to increase from 131% to 143%. Mobile broadband SIM subscriptions , for both data-only services and those used for voice plus data also grew in the period, from 1,262,295 to 1,432,996, an increase of 14%. Additionally, Mobile broadband penetration grew from 105% to 118%. This growth is mainly attributed to growing demand for more reliable and faster broadband connectivity by both businesses and households.

Figure 3: Mobile Subscriptions and Market Penetration

Source: ESCCOM, 2025

Footnote: Box 1 – Revision of Mobile Broadband Subscription Figures

During the preparation of the 2025 Annual Report, a methodological inconsistency in the compilation of Mobile Broadband SIM Subscriptions (both data-only and voice plus data) indicators for the fiscal years 2022/23 and 2023/24 was identified. One of the mobile operators had previously reported active mobile broadband subscriptions based on a 2-month activity window, rather than the 3-month standard defined by the International Telecommunication Union (ITU) World Telecommunication/ICT Indicators (WTI) definition.

In accordance with the ITU WTI definition, Mobile Broadband Subscriptions are counted as those with activity in the past three months. The revised figures below reflect this corrected definition and ensure consistency with the ITU WTI definition.

Revised Mobile Broadband Subscriptions

Fiscal Year	Previously Reported	Revised	Change
2022/23	1,389,894	1,191,764	-198,130
2023/24	1,473,487	1,262,295	-211,192

Source: ESCCOM, 2025

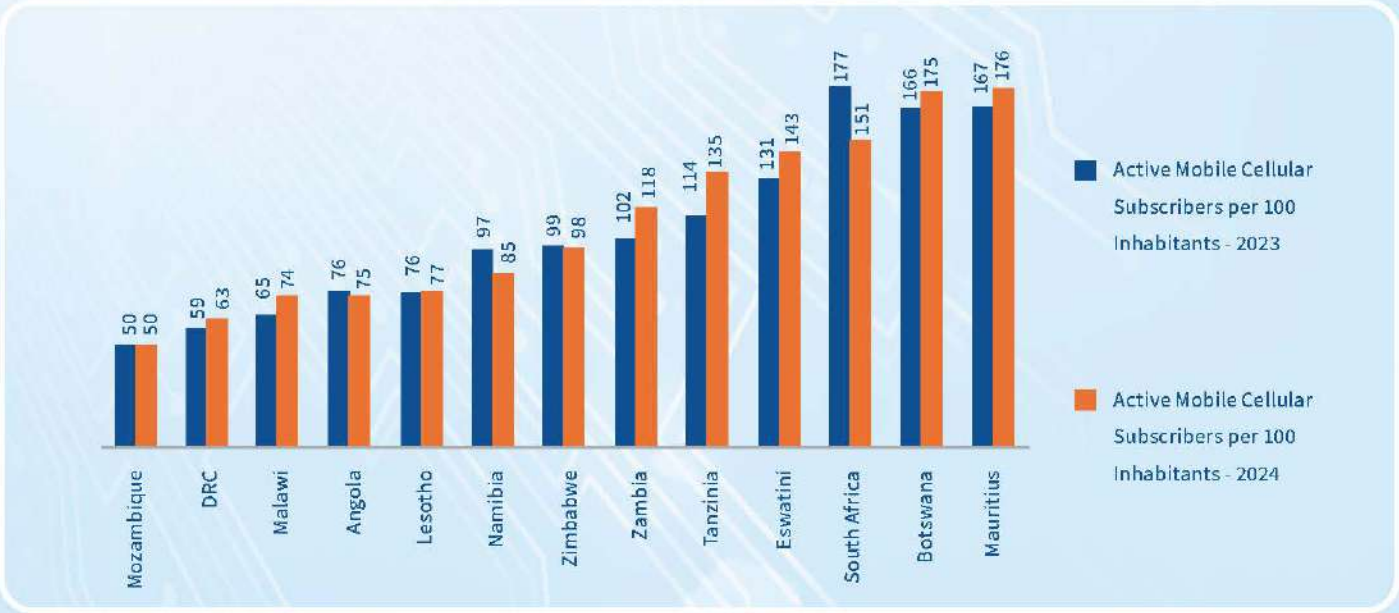
Mobile Broadband Subscriptions revised from previously reported 1,389,894 for FY 2022/23 and 1,473,487 in FY 2023/24 in Annual Report 2024 due to a correction in the statistical definition and methodology used in data compilation. See Box 1 for details.

4.1.2. Mobile Cellular Subscriptions Growth in the SADC Region

According to the Communications Regulators' Association of Southern Africa (CRASA) Report[5] 2024, in the SADC region the regional average for mobile cellular subscribers per 100 inhabitants was 109, above the African average of 98 but still below the World average of 112. This figure represented a marginal climb from the 106 recorded in 2023.

In the same period, notable penetration was recorded for Eswatini with a progress from 131 to 143 mobile cellular subscribers per 100 inhabitants. This indicator (mobile cellular penetration) is particularly important as it reflects the uptake of mobile broadband technology, a key enabler for digital transformation and innovation. A high number of mobile subscriptions per capita indicates a strong foundation for the development of digital services and applications.

Figure 4: Mobile Cellular Penetration in SADC



Source: CRASA, 2024

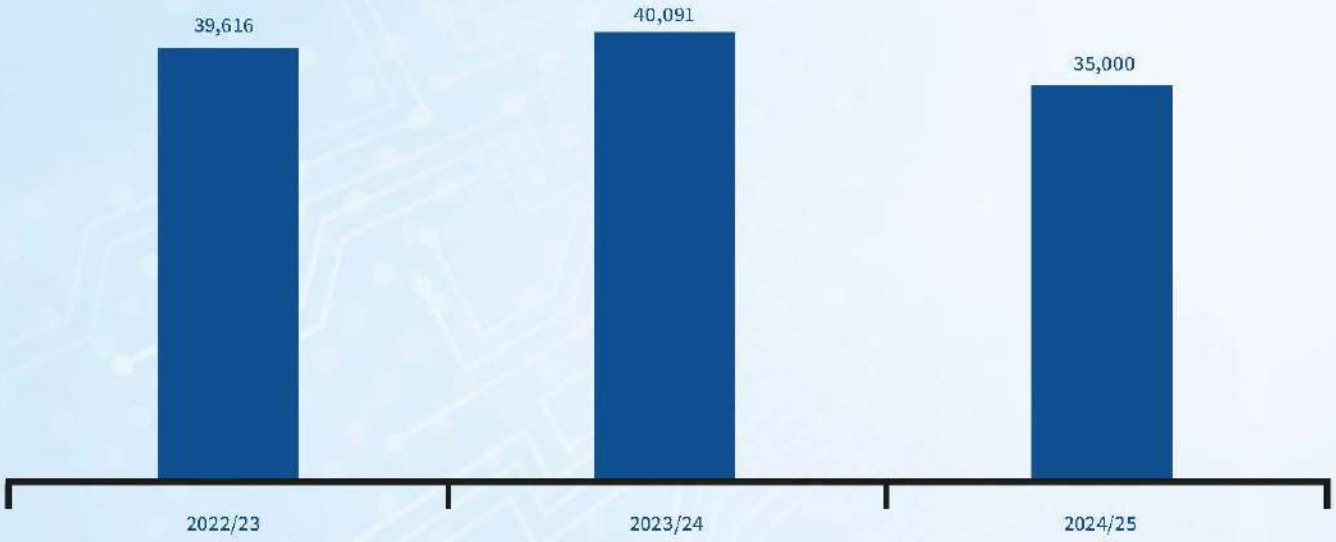
4.2. FIXED MARKET CONNECTIVITY

4.2.1. Fixed Telephone Subscriptions

Fixed telephone subscriptions declined by 13% to 35 000, down from 40 092 reported in the previous period. The decline was across all service providers, with the most decline recorded by EPTC which is attributed to copper theft. Resultantly, businesses and households have switched to fixed-wireless services for more reliable service provision.

[5]*CRASA State of the ICT Sector Report, 2024*

Figure 5: Fixed Telephone Subscriptions



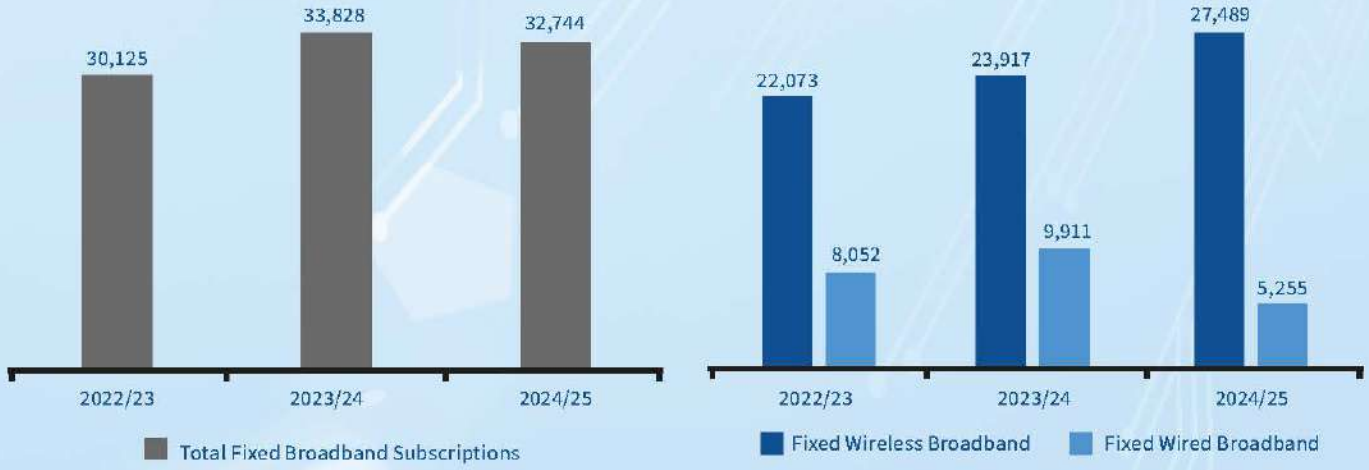
Source: ESCCOM, 2025

4.2.2. Fixed Broadband Subscriptions

Broadband accessibility continues to be a key enabler for economic growth, therefore, ensuring ease of access for all citizens remains a high priority. In the review year, total fixed broadband subscriptions declined by 3% to 32,744 from 33,828. This overall decrease was primarily driven by a significant 47% drop in fixed-wired broadband subscriptions, which fell to 5,255 from 9,911. In contrast, fixed-wireless broadband continued its upward trend, growing by 15% to 27,489 subscriptions, up from 23,917. Fixed broadband penetration therefore dropped to 2.69%.

However, the strong growth in fixed-wireless subscriptions was not sufficient to offset the sharp decline in fixed-wired connections, resulting in a net reduction in total fixed broadband subscriptions during the reporting period. Due to the copper theft and infrastructure vandalism challenges, there has been an observed shift from fixed line ADSL to fixed wireless, fibre and satellite internet network services.

Figure 6: Fixed Broadband Subscriptions

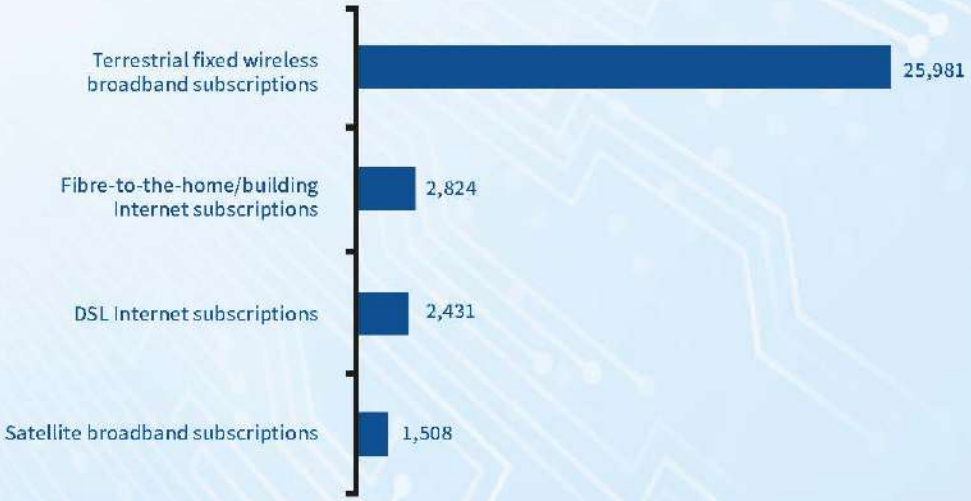


Source: ESCCOM, 2025

4.2.3. Fixed Broadband by Technology

Fixed broadband connectivity in Eswatini is predominantly driven by Fixed Wireless Access (FWA), specifically fixed terrestrial broadband subscriptions, as illustrated in Figure 7 below. This dominance is largely attributed to FWA's ability to leverage the existing nationwide 3G and 4G/LTE mobile network infrastructure, along with its lower deployment costs, faster rollout and greater suitability for serving dispersed populations compared to fibre and copper DSL technologies. In contrast, satellite broadband—comprising Very Small Aperture Terminal (VSAT) and Low Earth Orbit (LEO) systems—currently holds the smallest market share despite offering broader geographic coverage, primarily due to the high cost of equipment and subscription fees.

Figure 7: Fixed Broadband Subscriptions by Technology



Source: ESCCOM, 2025

4.2.4. Fixed Broadband Subscriptions Market Share

The fixed broadband market remained moderately concentrated, with five (5) out of fifteen (15) active licensees accounting for over 90% of total fixed broadband subscriptions. However, the year-on-year shifts in market share among these licensees, as illustrated in Figure 8 highlight the ongoing competitive dynamics within the market.

For a consecutive year, the Fixed Broadband market share shifted in favour of EPTC's Eswatini.net, rising by 4% to 31% from 27%. The MNOs, MTN and Eswatini Mobile lost ground in the period with declines of 5% for MTN to 19% and a decrease of 3% for Eswatini mobile to 22%, respectively. Real Image Internet dropped 2% market share to 9% while Jenny internet gained 3% to 12%. Starlink's market share increased by 3.9% to stand at 5%. Starlink's presence has ignited competition in the fixed broadband market as other players have raised their speeds to match current offerings in the dynamic market.

Figure 8: Fixed Broadband Subscriptions Market Share

Source: ESCCOM, 2025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ESWATINI DATA PROTECTION AUTHORITY
SZ CIRT
ESWATINI COMPUTER INCIDENT RESPONSE TEAM
Eswatini Communications Commission
UNIVERSAL
ACCESS SERVICE FUND

4.2.5. Satellite Broadband Penetration in SADC

The penetration rates for fixed subscriptions are much lower than for mobile subscriptions, because fixed connections are usually shared by several people in a household. Broadband connections are relatively higher in in high-income countries but almost non-existent in low-income countries, due mainly to a lack of infrastructure and the high cost of expanding network coverage in underserved regions. This is where satellite broadband comes in. For most developing countries, satellite broadband can be superior to fixed broadband because it offers a quicker and more cost-effective way to provide internet access in remote areas where building extensive infrastructure for fixed lines is impractical or expensive. A comparison of satellite broadband subscriptions as a percentage of fixed broadband subscriptions in the SADC region has been included to establish a baseline for monitoring the anticipated rapid uptake of the fledgling satellite industry in the coming years.

Satellite Broadband subscriptions as a percentage of Fixed Broadband subscriptions presents an update on the permeation of satellite technology in the SADC region. Malawi is a clear outlier in this regard[6], with a percentage of 76% while Lesotho and Botswana lie on the other end of the spectrum.

Figure 9: Satellite Broadband Subscriptions in the SADC Region

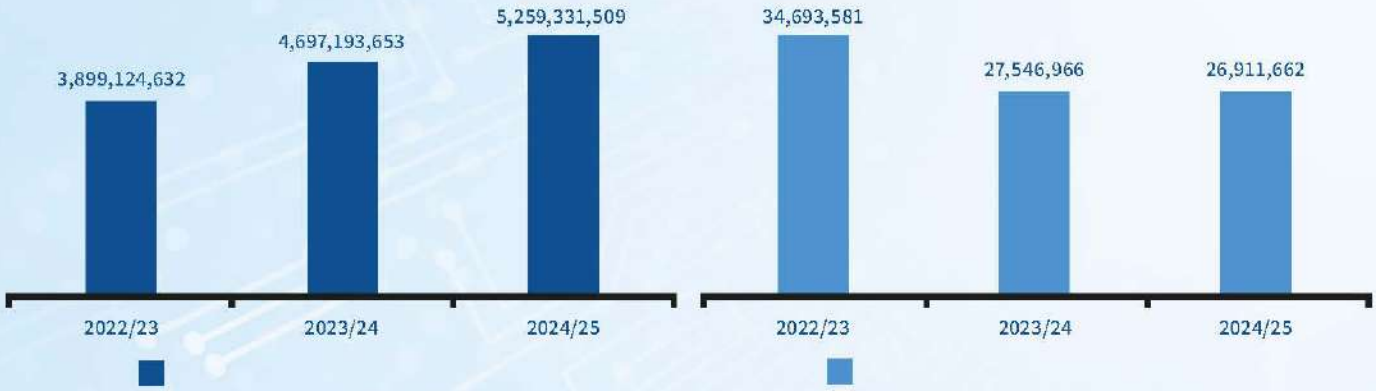
Source: CRASA, 2024

4.2.6 Voice Traffic in Minutes

Domestic voice traffic continued its upward trajectory, growing by 12% to 5,259,331,509 minutes, up from 4,697,193,653 minutes in the previous period. This growth was primarily driven by the increased availability of competitive bundled offers. In contrast, international voice traffic declined slightly by 2% to 26,911,662 minutes, down from 27,546,966 minutes in the previous fiscal year, largely due to the growing use of Over-the-Top (OTT) communication services.

[6]Malawi has high satellite penetration in the Southern African Development Community (SADC) because its geography, characterized by mountains and heavily forested areas, makes terrestrial infrastructure like fibre optics and microwave links expensive or impossible to install, especially in rural areas with low population density. Satellite backhaul provides a cost-effective solution for providing cellular and internet services in such challenging terrains, enabling connectivity for critical services like healthcare and education and fostering digital development. Satellite internet and communication providers in Malawi include major LEO players, established providers offering VSAT services over GEO satellites and other service providers using various satellite bands (C, Ku, Ka) to serve businesses, NGOs, and individuals.

Figure 10: Voice Traffic in Minutes

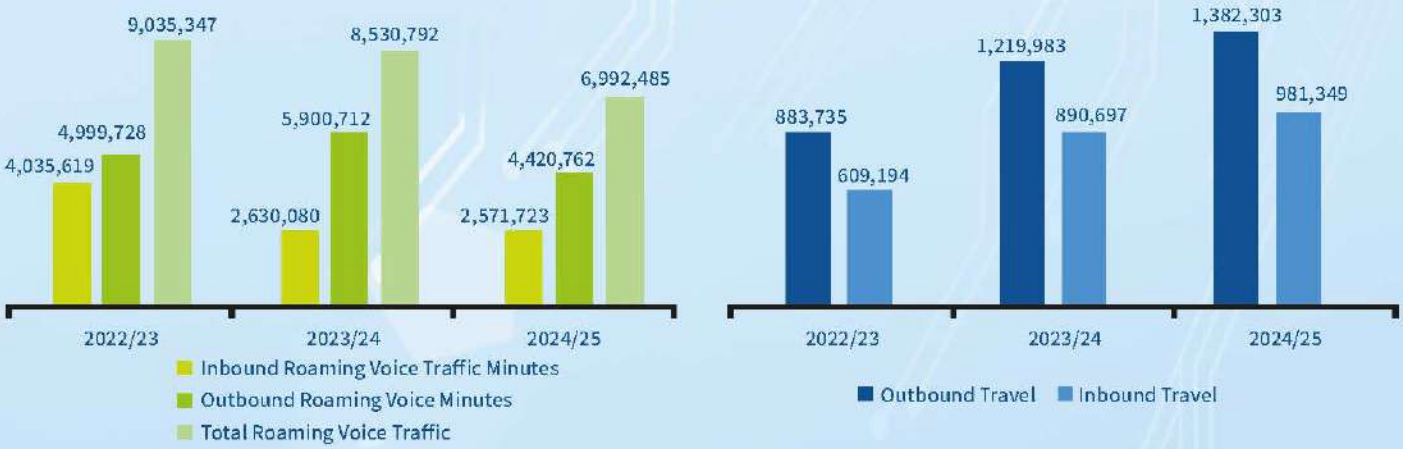


Source: ESCCOM, 2025

Total roaming voice traffic continued its downward trend, declining by 18% to 6,992,485 minutes from 8,530,792 minutes in the previous year. This decline was driven by reductions in both outbound and inbound roaming traffic. Outbound roaming traffic dropped significantly by 25%, falling to 4,420,762 minutes from 5,900,712 minutes while inbound roaming traffic decreased slightly by 2% to 2,571,723 minutes from 2,630,080 minutes.

Notably, this decline in roaming traffic contrasts with the growth in international travel during the same period, as illustrated in Figure 11. Outbound travellers recorded at national borders and the airport increased by 13% to 1,382,303, up from 1,219,983. Inbound travellers also rose by 10%, reaching 981,349 compared to 890,697 in the previous year. The continued decline in roaming traffic, despite increased travel, may be attributed to the growing use of Over-the-Top (OTT) communication services and the relatively high cost of traditional roaming.

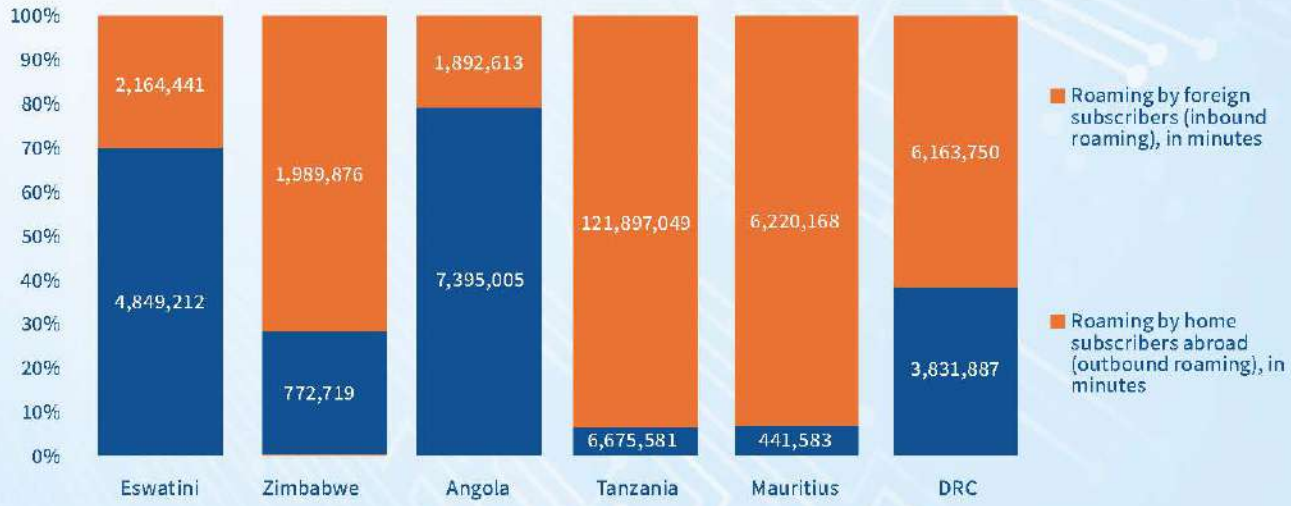
Figure 11: Roaming Voice Traffic in Minutes (LHS) and International Travel Statistics (RHS)



Source: ESCCOM, 2025

Roaming is important for maintaining continuous mobile network service when a subscriber is outside their home network's coverage area, ensuring they can make calls, send messages, and access data services, even when traveling. For this reason, affordable roaming is crucial for regional integration as it facilitates seamless communication and connectivity across borders, promoting economic cooperation and breaking down barriers to communication, ultimately benefiting consumers and businesses within the SADC Region. The Ratio of Inbound to Outbound Roaming Traffic in Minutes in the SADC Region is shown below.

Figure 12: Ratio of Inbound to Outbound Roaming Traffic in Minutes



Source: CRASA, 2024

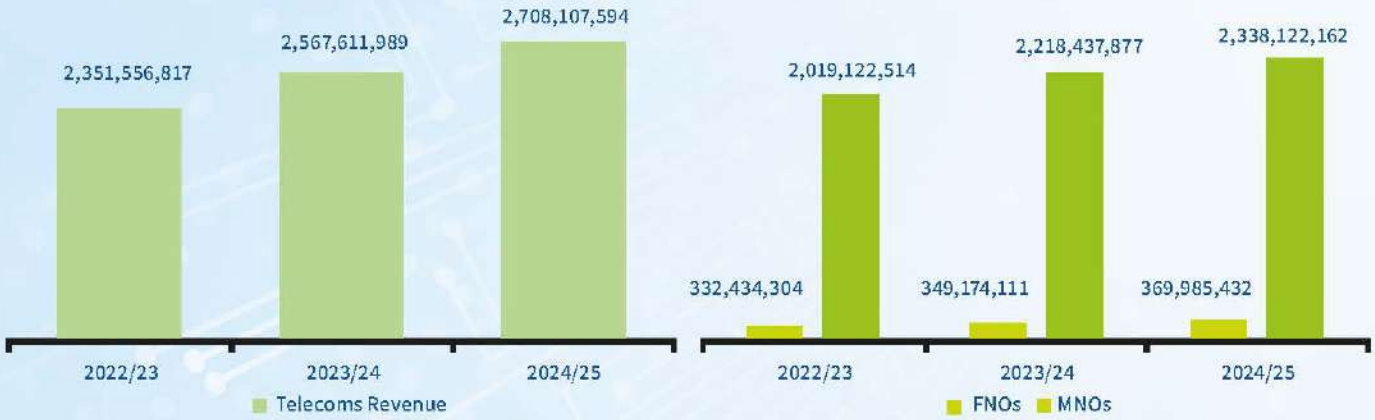
4.3. ECONOMIC INDICATORS

4.3.1. Telecommunications Revenue

Total telecommunications revenue at current prices generated by the industry continued its upward trend, increasing by 6% to E2,708,107,594 from E2,567,611,989. This growth was driven by strong performance from both Mobile Network Operators (MNOs) and Fixed Network Operators (FNOs), as illustrated in Figure 13. MNOs revenue rose by 5%, reaching E2,338,122,162 compared to E2,218,437,877 in the previous year, while FNOs revenue increased to E369,985,432 from E349,174,111. This growth was mainly driven by growth in data and voice services revenue.

Preliminary estimates by the Central Bank of Eswatini, 2024 indicate that Eswatini's real GDP growth slowed to 2.6% in 2024, down from a revised provisional estimate of 3.4% in 2023. However, the transport, storage and communication subsector (of which the ICT sector is a component) posted strong growth with a contribution of 0.87% to the GDP. This validates the growth in telecoms revenues experienced over the period.

Figure 13: Telecommunications Revenue at Current Prices (in Emalangeni)



Source: ESCCOM, 2025

4.4 EMPLOYMENT IN THE TELECOMMUNICATIONS INDUSTRY

Employment in the telecoms industry showed a modest recovery, increasing by 0.3% to 957 employees, up from 954 as illustrated in Figure 14. This slight growth was primarily driven by a 3% rise in employment among fixed network operators, which climbed to 691 from 668. In contrast, mobile network operators experienced a 7% decline in their workforce, dropping to 266 from 286. A combination of factors led to the reduction of MNOs employment, such as company restructuring, natural attrition and retirement.

Figure 14: Persons Employed in the Telecommunications Industry

Source: ESCCOM, 2025

4.5. POSTAL AND COURIER SERVICES MARKET

4.5.1. Postal Market Performance Indicators

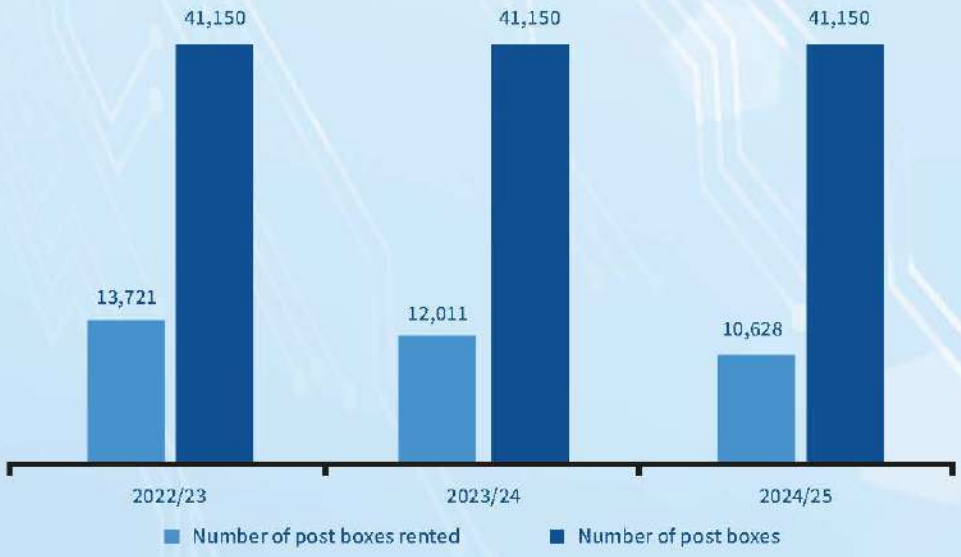
The postal service market continued to decline in the review period, largely due to digital substitution, a trend often referred to as electronic diversion. This refers to the replacement of physical mail with digital alternatives such as email, online billing and mobile messaging services. Eswatini has a total of 53 postal service points, with 43% located in rural areas. 37 of these are full service permanent post offices. About 95% of all mail is delivered through Post Office boxes while 5% is delivered directly to the home or business premises. Additionally, 36% of all Permanent Post Offices have internet connectivity with 15% of Permanent Post Offices able to provide the public with internet access points.

4.5.2. Post Office Box Rental

Demand for post box rental services continued to fall in the period, recording a 12% decline from 12 011 boxes to 10 628 rented. Postal box occupancy ratio also declined from 29% to 26%. This decline is largely attributed to low demand for post box rentals by digitally savvy consumers and businesses, who are increasingly turning to faster and more affordable communication methods. Due to the alternative faster methods, consumers are not renewing their post office box rentals with most of them shifting their preferences towards digital communication platforms. Individual customers account for more than 60% of post box rentals relative to business customers.

The incumbent Designated Postal Operator (DPO), Eswatini Post revitalised its courier and package delivery service to provide last mile shipping in the previous reporting period. There has also been a growth of licensed courier service providers from eight (8) to fourteen (14) postal and courier service providers in the period. Package delivery service is thriving in developed countries with established Addressing and Postcode Systems. Hence Eswatini has embarked on developing its own National Addressing and Postcode system, to facilitate an efficient and accurate addressing system, and thus resuscitate the e-commerce industry.

Figure 15: Total Number of Post Boxes and Number of Post Boxes Rented



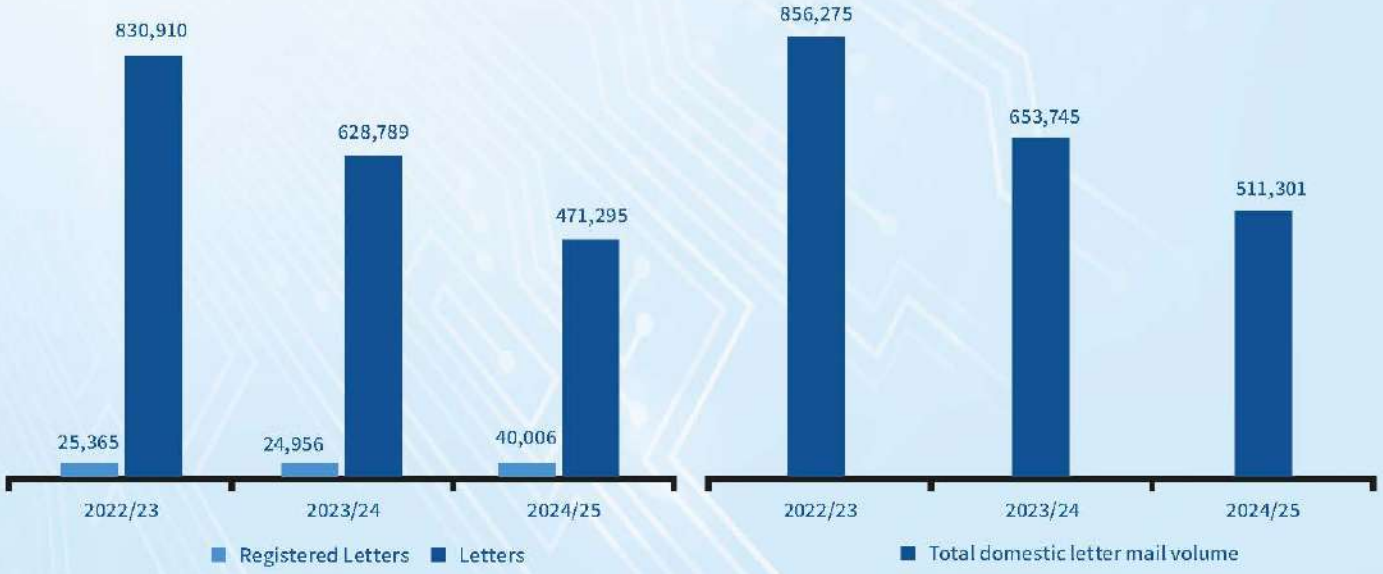
Source: ESCCOM, 2025

4.5.3. Domestic Letter Mail

Domestic letter mail reported mixed performance in ordinary mail and registered mail. Ordinary letter mail volumes continued to fall due to digital substitution, by both household and business consumers. Letter mail volumes continued to fall, declining by 25% from 628,789 to 471,295. This decline was mainly attributed to increasing digital substitution in financial and public service sectors, which saw a decline in letter mail volumes.

Businesses have increasingly adopted paperless electronic services like e-mails, SMSs, and social media. Transactional mail from businesses to customers such as statements, utility bills and catalogues have also been digitised and sent directly and securely to customers at lower costs compared to traditional mail.

Figure 16: Domestic Letter Mail Volume



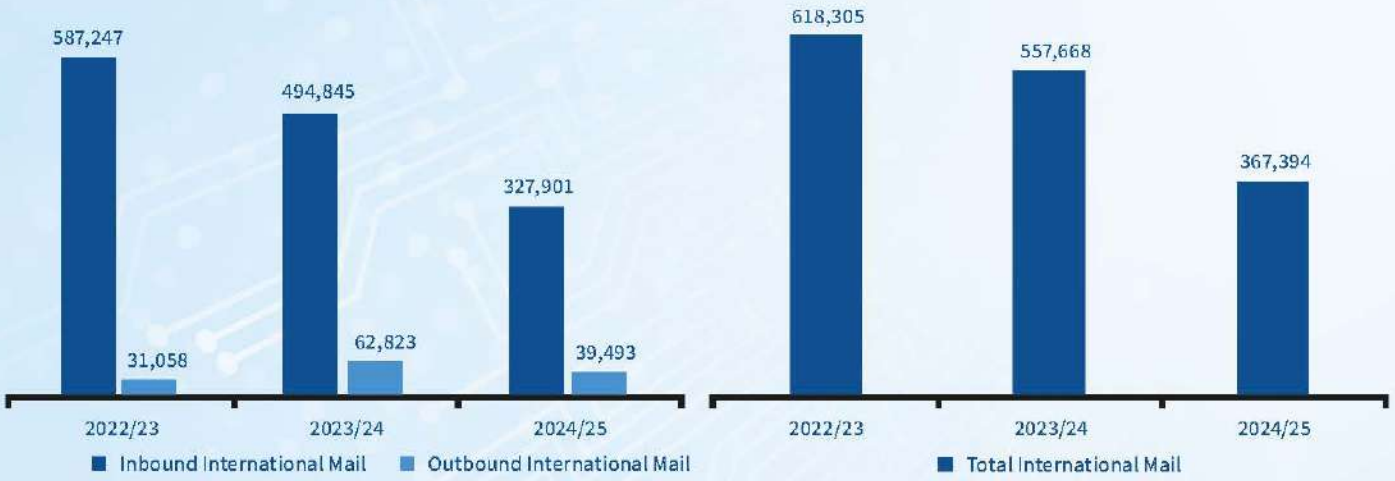
Source: ESCCOM, 2025

4.5.4. International Mailing Services

Total international mail volume continued its downward trend, declining by 34% to 367,394 items from 557,668. This decline was driven by reductions in both inbound and outbound international mail. Inbound mail fell by 34% to 327,901 from 494,845, while outbound mail dropped by 37% to 39,493 from 62,823 in the previous year.

The continued decrease in international mail volumes as illustrated in Figure 17, is largely attributed to growing digitalisation, as high-volume commercial content such as sales catalogues and advertisements increasingly shifts to digital platforms. This trend mirrors the impact of increasing digital communication adoption on the postal service.

Figure 17: Total International Mail Volume



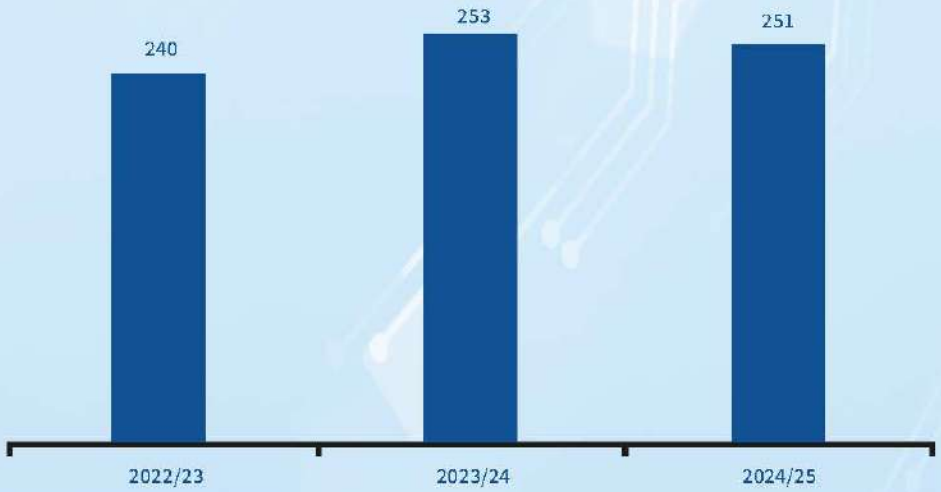
Source: ESCCOM, 2025

4.5.5. Express Mail Services

Express mail volume declined slightly by 1%, falling to 251 items from 256. Express mail services offer a faster alternative to standard mail options, typically at a slightly higher cost and are often used for time-sensitive deliveries.

Express Mail volume is driven by the demand for faster and secure inbound physical mail services for items procured on global e-commerce platforms. This demand is motivated by customers' growing necessity for extra secure and faster inbound services for online purchases.

Figure 18: Express Mail Volume

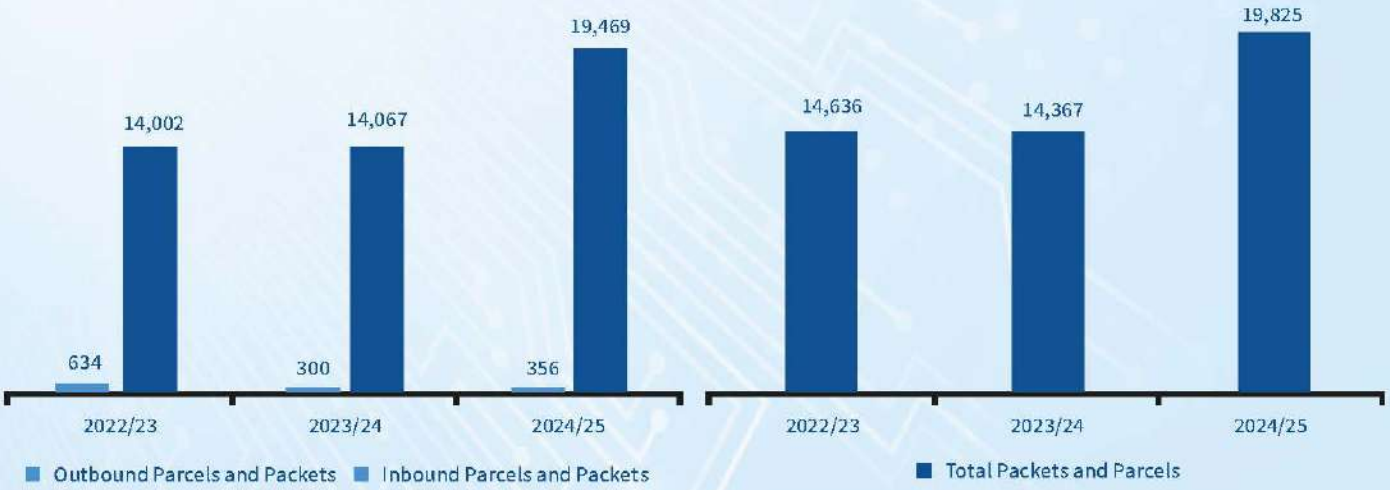


Source: ESCCOM, 2025

4.5.6. Parcel and Packet Volumes

International parcel and packet mail volumes demonstrated strong signs of recovery, reflecting improvements in cross-border mail supply chains compared to previous financial years, as illustrated in Figure 19. Total parcel and packet volumes increased by 38%, rising to 19,825 from 14,367. This growth was primarily driven by inbound volumes, which grew by 38% to 19,469 from 14,067. Outbound parcels and packets also recorded growth, increasing by 19% to 356 from 300 in the previous period. The demand for parcel and packet services has been resilient compared to other letter mailing services.

Figure 19: Parcel and Packets Volumes



Source: ESCCOM, 2025

4.5.7 Postal Sector Revenue

The postal sector recorded a continued upward trend in total annual revenue, increasing by 47% to E44,745,064 from E30,356,122, despite a sustained decline in demand for traditional postal mail services. Growth was primarily driven by the expansion of agency service revenues, particularly from electricity sales transactions, which continue to benefit from the extensive nationwide postal branch network. Revenue from agency fees improved by 34% to E28,313,299 up from E21,070,213.

Noteworthy, telegraph services experienced a substantial increase of 13,581%, rising from E52,089 to E7,126,126 largely due to increased transmission of radio announcements via post office channels in the financial year. Stamp sales also extended by 34%, reaching E400,123 from E299,129. Additional revenue streams, including other income and commissions, also reported positive performance.

However, mailbox rental income continued to decline, reflecting the ongoing reduction in demand for traditional mailing services. Overall, the strong revenue performance, driven by agency services, commissions, and telegraph services underscores the evolving role of the postal network in supporting formal communication, particularly in areas with limited access to digital infrastructure.

Figure 20: Annual Total Postal Revenue by Service

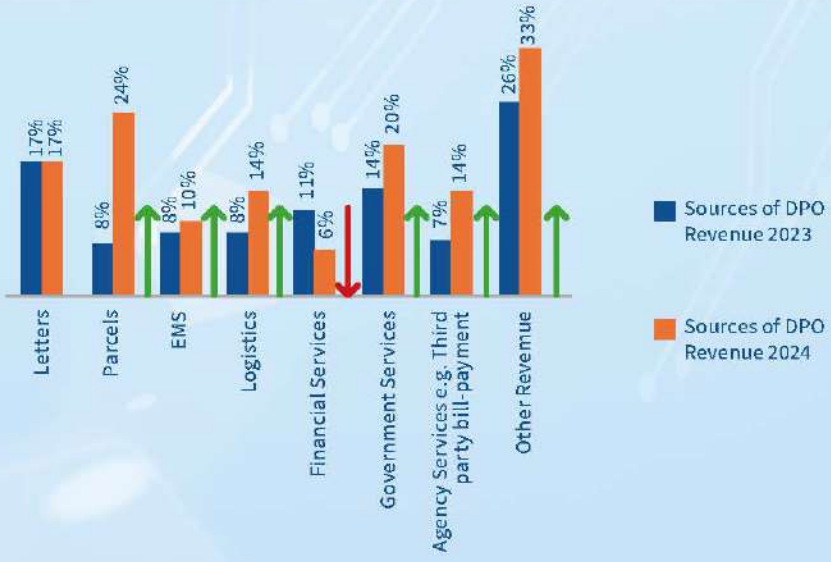
Source: ESCCOM, 2025

4.5.8 Designated Postal Operators (DPOs) Revenue Streams in SADC

The Eswatini Posts and Telecommunications Corporation is the Designated Postal Operator (DPO) in Eswatini. An analysis of SADC DPOs revenues (through regional aggregation) was undertaken to show which products and services were on the rise or decline at a regional level.

The Letter Post service remained relatively static during this period, representing on average 17% of revenue generated by DPOs. Contrastingly, there was an encouraging rise in Parcel revenue from 8% to 24%. The only decline in percentage contribution to total revenue was observed in Postal Financial Services (from 11% to 6%) which is hypothesised to be the result of the growth of mobile money as a more prevalent means of financial inclusion.

Figure 21: Designated Operators (DPO) Revenue Streams in SADC

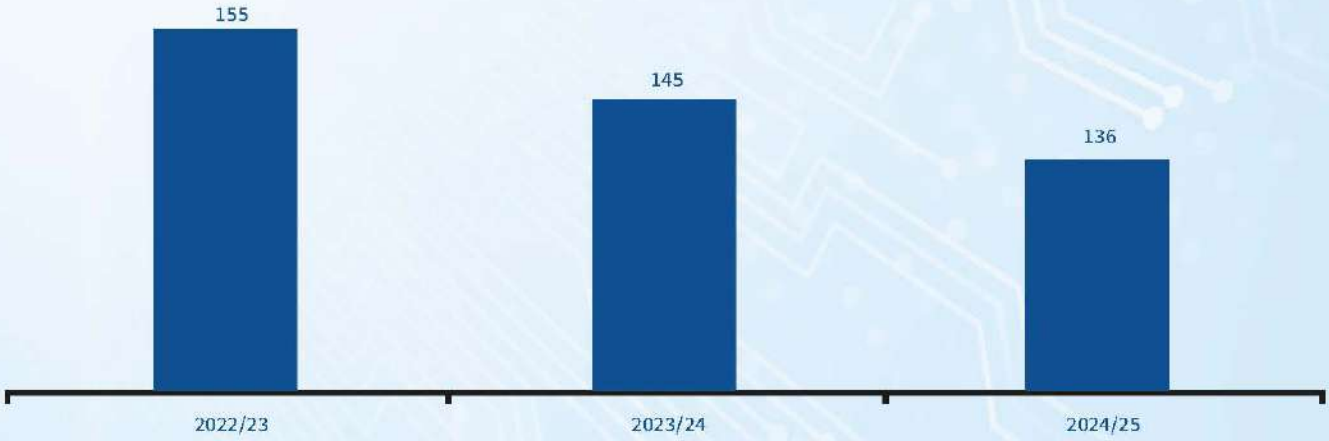


Source: CRASA, 2024

4.5.9. Employment in the Postal Sector

The number of persons employed in the postal sector continued a downward trend falling by 6.2% to 136 from 145. This trend is attributed to natural attrition, resignations and retirement. Eswatini Post's cost management strategy was such that resigning and retiring employees were not replaced, which resulted in lowered numbers of postal services employees. This also applied to EPTC's (the parent company) employees who were on contracts, where the company would run down the contracts and not renew it upon expiration as cost containment measures.

Figure 22: Persons Employed in the Postal Sector



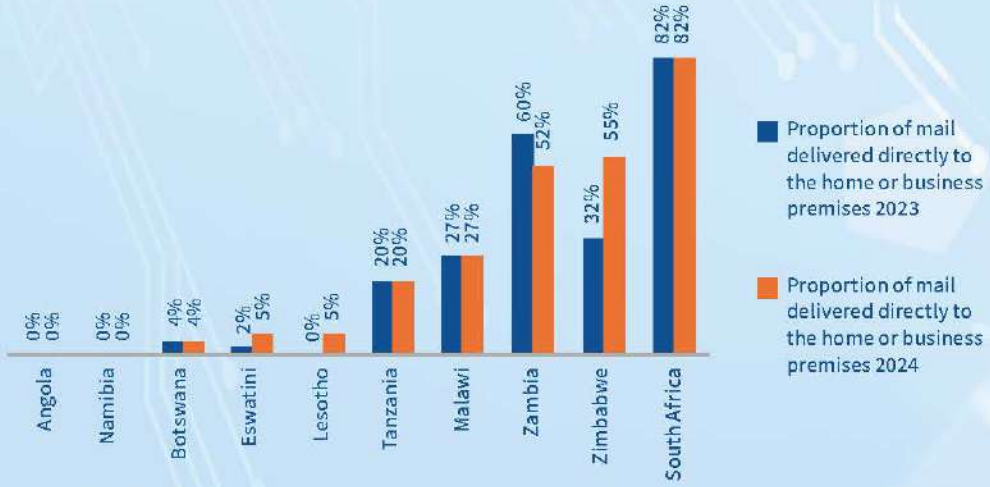
Source: ESCCOM, 2025

4.5.10. Proportion of Mail Delivered Directly to the Home or Business Premises

The delivery of mail directly to the home or business premises is an exceptional indicator for the existence and pervasiveness of national addressing systems. In the SADC regional context, higher percentages of home delivery were recorded in South Africa, Zimbabwe, Zambia, Malawi and Tanzania, all of which are at varying levels of implementing national initiatives to improve physical and digital addressing.

The growth in e-commerce anticipated to benefit the postal sector can only be realised if the issue of national addressing is resolved. The Kingdom Eswatini has embarked on the national addressing project, albeit at the preliminary stage currently, a key aspect to the survival of the postal industry. Mail delivered directly to the home or business in Eswatini improved from 2% to 5% in the review period.

Figure 23: Mail Delivered Directly to the Home or Business Premises in SADC



Source: CRASA, 2024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4.6. BROADCASTING MARKET

On the regional context, the broadcasting industry has experienced significant changes, driven by technological advancements and shifting consumer preferences between 2019 and 2024. In the Television (TV) space, MultiChoice reported increasing competition from unlicensed streaming services. At the same time, increased internet access and evolving consumer behaviour were the most significant drivers of the shift towards digital and streaming services. The rapid growth of streaming services marked a dynamic shift in the industry, with a significant portion of the population now engaging in digital content consumption.

Unsurprisingly therefore, the traditional TV landscape has been transformed through the impact of these streaming services and like global trends, South African TV companies are increasingly bundling OTT services with their traditional offerings. For instance, MultiChoice offers bundles that include its own streaming service, Showmax, and other streaming services alongside traditional DStv packages.

This approach not only enhances the value proposition for consumers but also helps retain subscribers who might otherwise switch entirely to OTT platforms. This is all in response to an increasingly competitive landscape with Netflix, Amazon Prime Video, and Disney+ being the major international players offering exclusive content, competitive pricing, and user-friendly interfaces[7].

On the other hand, the radio industry has demonstrated resilience amidst ongoing industry headwinds. Whilst increasing penetration of smartphones and digital devices have facilitated increased access to online radio platforms, traditional radio has faced subdued results despite listenership remaining robust. Radio has also been impacted by changing consumer behaviour, but relatable content and innovative methods of listenership engagement, as well as the continued growth of community radio stations, are keeping radio relevant and mainstream.

4.6.1. Number of Broadcasting Licenses Issued by Type

Most broadcasting indicators in Eswatini did not change in the review period. The Kingdom has twenty-two (22) transmission sites for radio, with two (2) Free-to-Air Television Licensees operational. There are eighteen (18) Digital Terrestrial Stations with one (1) Signal Distributor and two (2) Content Distributors. Further, Eswatini has thirty-five thousand (35 000) set-top boxes.

The total number of broadcasting licensees remained at five (5). There are two (2) Community Broadcasting Radio licensees, one (1) Operational Public Broadcasting Radio Licensee, one (1) Commercial Television station and one (1) Public Television Licensee in the market.

Figure 24: Number of Broadcasting Licenses Issued by Type

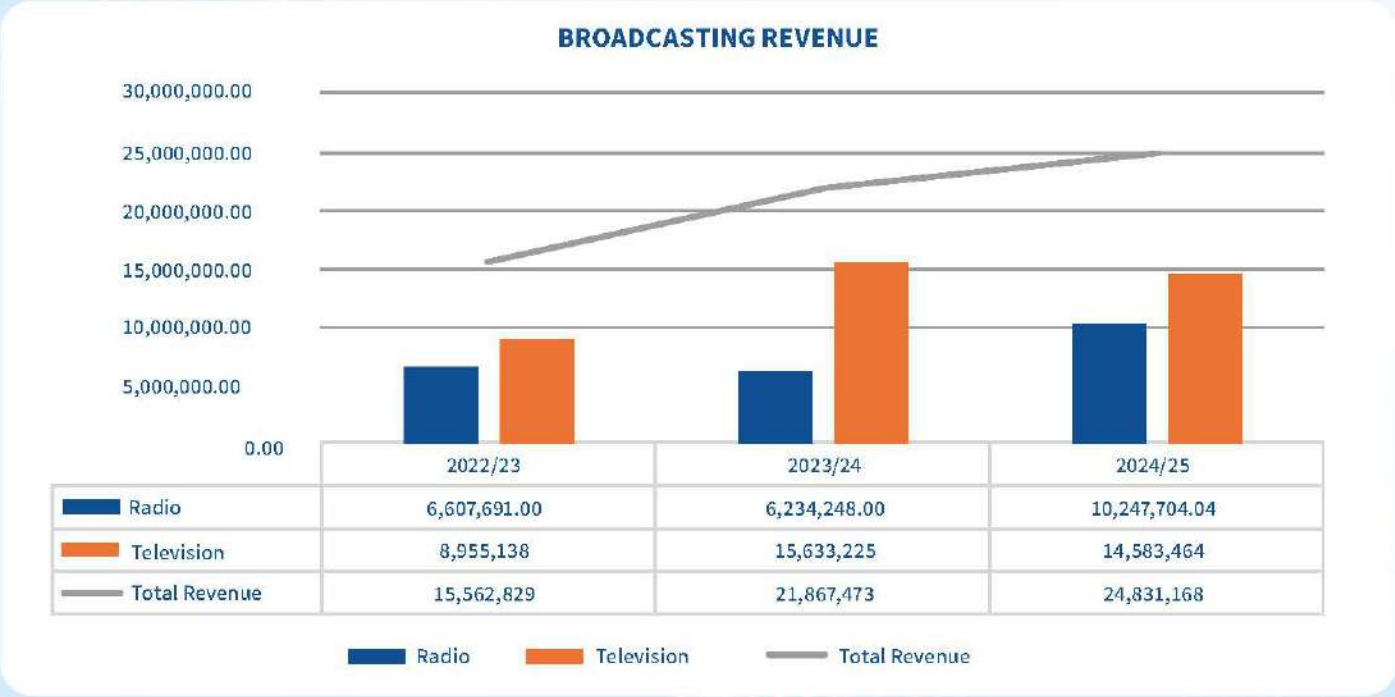
Source: ESCCOM, 2025

[7] *National Association of Broadcasters, State of the Broadcasting Industry Report, 2024*

4.6.2. Broadcasting Revenue

The broadcasting subsector generated total revenue amounting to E24,831,168, an increase of 13.6% from E21 867 473. Sources of revenue for broadcasting licensees are mainly commercial advertising, general announcements and sponsored programmes. Revenue recognised by radio broadcasting licensees amounted to E10,247,704 showing a significant growth of 64.4% from E6 234 248. In contrast, television broadcasting revenue declined by 6.7% to E14,583,464 from E15,633,225.

Figure 25: Broadcasting Market Revenue in Emalangeni



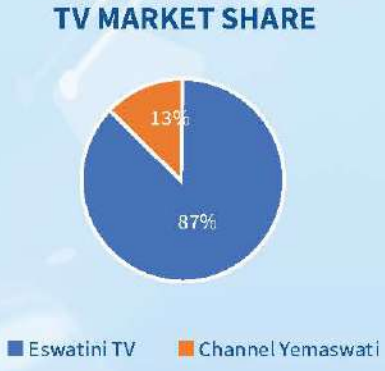
	2022/23	2023/24	2024/25
Radio	6,607,691.00	6,234,248.00	10,247,704.04
Television	8,955,138	15,633,225	14,583,464
Total Revenue	15,562,829	21,867,473	24,831,168

Source: ESCCOM, 2025

4.6.3. Broadcasting Licensees Market Share by Revenue

In terms of market share by revenue in the review period, the public TV broadcaster, Eswatini TV (ESTVA) holds 87% market share while the commercial broadcaster, Channel yeMaswati hold 19%. This demonstrates a 6% increase in market share for ESTVA from 81% to 87%.

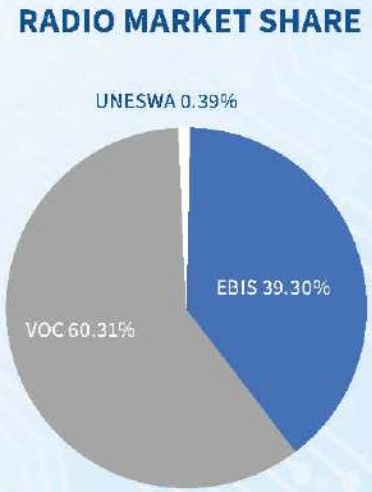
Figure 26: Television Broadcasting License Revenue Market Share



Source: ESCCOM, 2025

In the radio market, the community radio broadcaster, Voice of the Church (VOC) holds 60% market share while the public radio broadcast station, Eswatini Broadcasting and Information Station (EBIS) hold 39% market share. UNESWA FM holds the remaining 0.39% market share.

Figure 27: Radio Broadcasting License Revenue Market Share

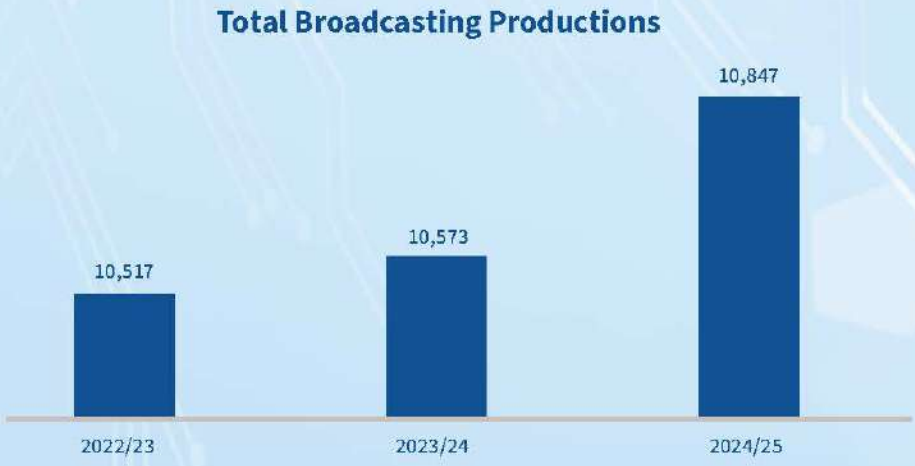


Source: ESCCOM, 2025

4.6.4. Number of Broadcasting Productions

Total broadcasting productions increased by 2.6% to 10,847 from 10,573 in the previous year. Gradually, the broadcasting market is growing worldwide owing to contemporary trends penetrating the market such as podcasts, content creation, digital radio, amongst other innovations.

Figure 28: Number of Broadcasting Productions

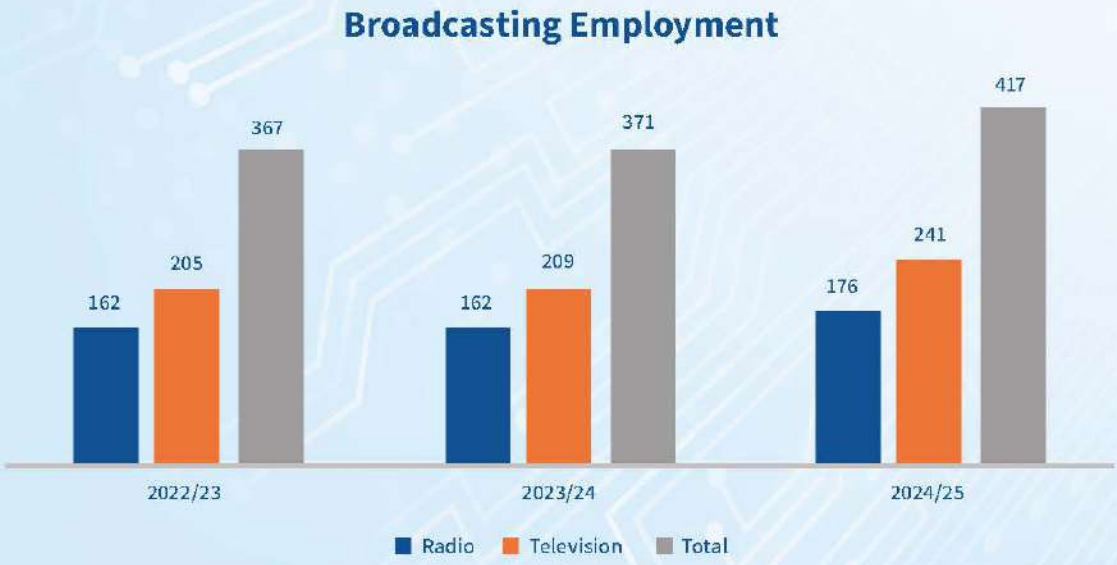


Source: ESCCOM, 2025

4.6.5. Broadcasting Sector Employment

Total broadcasting sector employment increased by 12.4% from 371 to 417. Radio employment grew by 8.6% from 162 to 176 while television employment figures extended by 15.3% from 209 to 241 personnel. The improvement in employment arose from the need for adequate staffing to adeptly perform operations as required by the ever-expanding scope of the broadcasters.

Figure 29: Broadcasting Sector Employment

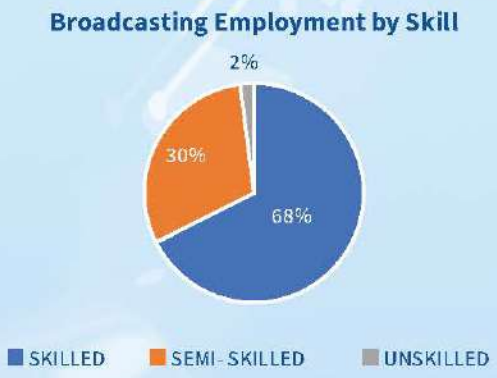


Source: ESCCOM, 2025

4.6.6. Employment Breakdown in the Broadcasting Sector

In terms of skills breakdown in the Broadcasting Sector, skilled labour improved by 2% to 68% which demonstrates that broadcasters have been making efforts in upskilling their workforce or hiring properly skilled personnel. The breakdown further shows that semi-skilled labour declined by the same margin, as employees upskilled themselves (from semi-skilled to skilled) while only 2% broadcasting employees are unskilled. Skilled jobs require candidates to have specialized competences. On the other hand, semi-skilled jobs require employees to have a standard level of knowledge and skills.

Figure 30: Broadcasting Sector Employment by Skillset



Source: ESCCOM, 2025

4.7. COST TO COMMUNICATE

4.7.1. Progress in Pricing of ICT Products and Services

There was no tariff adjustment on the voice out-of-bundle rates in the review period. All three (3) telecommunication network operators maintained their tariffs, notwithstanding that MTN has not changed their headline voice tariff since the completion of the Call Termination 3-year glide path. Table 3 depicts the out of bundle voice tariffs as of 31 March 2025.

On mobile data, MTN reduced its out-of-bundle (OOB) rate from E0.49 to E0.25 per megabyte. Both Eswatini Mobile and MTN offered the same OOB rate for data at the close of the reporting period. MTN reduced the OOB rate after launching the option for customers to choose either they continue to be charged at OOB rate once their initial data bundle has been depleted or purchase an additional bundle.

Table 3: Voice Out-of-Bundle Rate Reduction

	Eswatini Mobile		MTN		On-net EPTC		Off-net (Mobile) EPTC	
	Old Tariff	New Tariff	Old Tariff	No Change	Old Tariff	New Tariff	Old Tariff	New Tariff
Peak	1,10	0,56	1,20	1,20	1,00	0,40	2,00	0,50
Off-Peak	0,66	0,33	0,60	0,60	0,50	0,25	1,00	0,25

Source: ESCCOM, 2025

4.7.2. Approval of Products and Services

The ESCCOM Act, 2013 under section 7(v) proposes the establishment of a pricing system to protect end-users from excessive price increases and to avoid unfair price competition. The regulatory initiative is intended at safeguarding protection of consumers in the ICT market and the prevention of anti-competitive practices such as predatory and excessive pricing which may result in the distortion of market dynamics.

Therefore, every product, service and price review request is carefully assessed to determine its impact on the market prior to introduction to the market. Most of these applications are requests to launch new products and services, proposals for price reviews, assessment of promotions, amendments to terms and conditions, as well as cancellations of redundant products. Key factors considered in the assessment procedure include affordability, consumer interests and competition.

Through this process, new products and services were rolled out in the market. These include new offerings launched by the two (2) new entrants in the market, being Broadband Technologies and Paratus Eswatini. Paratus Eswatini offered products designed for businesses and enterprises, whereas Broadband Technologies offered services targeting both residential customers and businesses.

Almost 41% of the applications received for approval were for new products and services. designed for business, enterprises, residential and individual (in the case of mobile) customers. Licensees streamlined existing service offerings to meet the ever-changing consumer needs, preferences, product performance and the strong desire to keep or grow their market shares. This was through increasing data volumes and capacity (speed) exclusive of changing the price. Amendments on existing products and services accounted for 16% of applications received.

In continuance of keeping communication costs affordable, service providers launched promotions which enabled customers to stay connected to the internet for longer periods by offering bonus data on bundles purchased. The promotions were well received by the market as licensees continued to launch more and gave away prizes. Figure 31 depicts a breakdown of the products and services approved in percentages.


Planner Dashboard

Figure 31: Products and Services Launched

Source: ESCCOM, 2025

4.7.3. Broadband Targets 2025

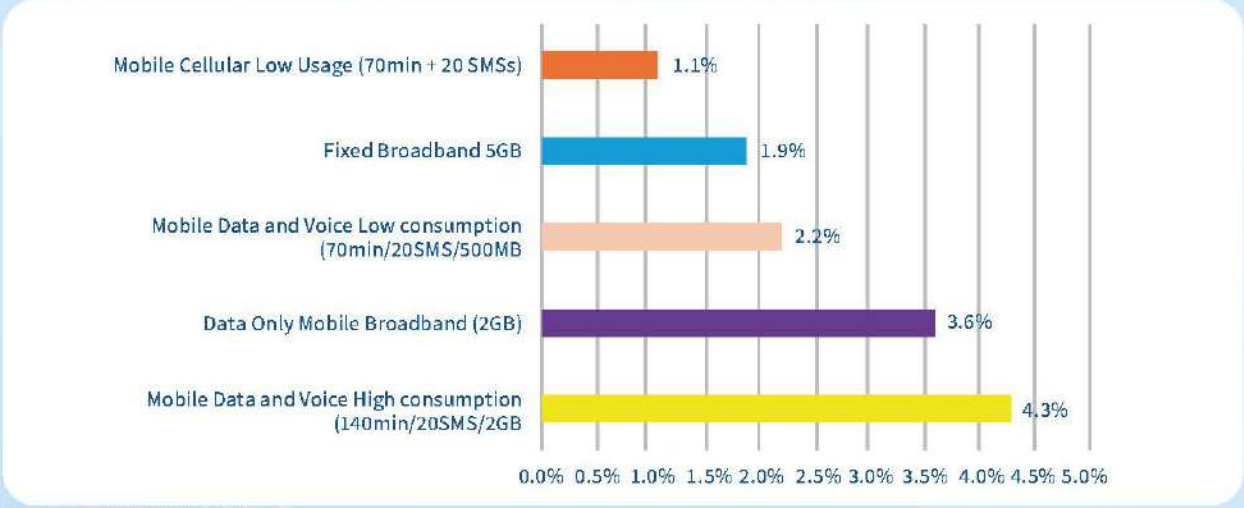
The government of Eswatini works in collaboration with other stakeholders such as SADC in fulfilling the UN Broadband Commission's targets. The Broadband Commission is a collaboration between the International Telecommunications Commission (ITU) and the United Nations Educational, Scientific and Cultural Organization (UNESCO). Target 2 of the Broadband Commission's Goals require developing economies to make broadband affordable.

By affordability, the Broadband Commission envisions that entry level broadband services should be priced at less than 2% of the country's monthly Gross National Income (GNI) per capita. In the context of ITU Price Baskets, GNI per capita is used to calculate affordability by expressing the cost of telecommunications services as a percentage of monthly GNI per capita. This helps normalize comparisons across countries with different income levels and currencies.

GNI per capita is universally viewed as a strong indicator of the standard of living of an average citizen in a country. Thus, using GNI per capita as a measurement of affordability to access entry level broadband services is more appropriate as it indicates the income level of the citizens.

ESCCOM conducted an exercise using the five ITU price baskets to determine the extent to which the Kingdom of Eswatini is meeting the Target. The analysis found that Eswatini has met the set target on three (3) Baskets, which are the: Fixed Broadband (5GB) Basket; Mobile Data and Voice Low Consumption Basket; and the Mobile Cellular Low Usage Basket. Figure 32 presents progress made on the different baskets.

Figure 32: Kingdom of Eswatini's Progress on Target 2

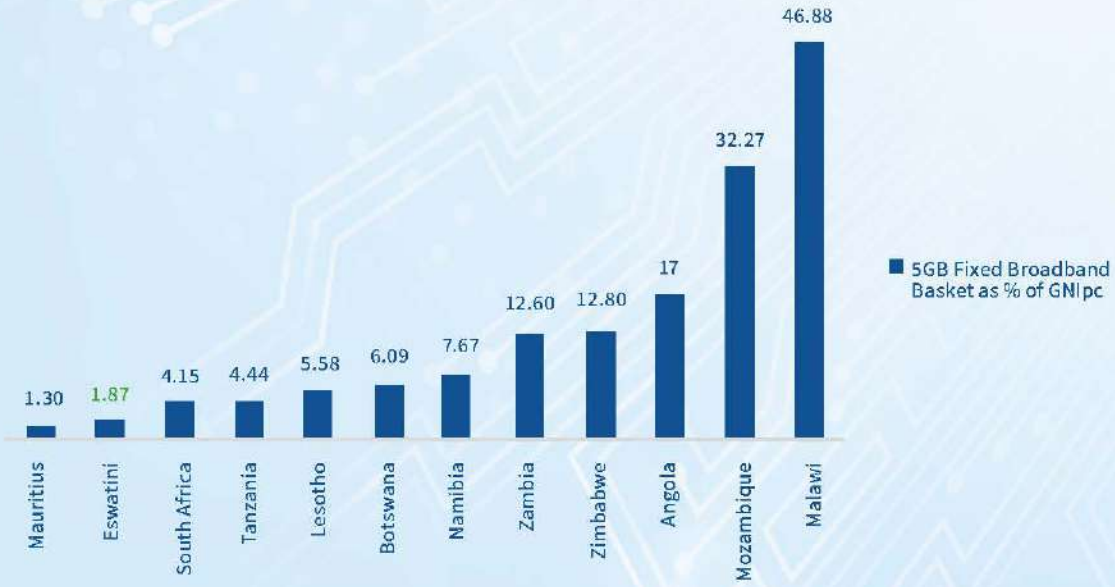


Source: ESCCOM, 2025

4.8. FIXED BROADBAND BASKET (5GB) IN SADC

The cost of a fixed-broadband basket (5GB) as a percentage of Gross National Income per capita is a key indicator of ICT service affordability, with the Broadband Commission for Sustainable Development aiming for a target of 2% of GNI per capita by 2025. In SADC, only Eswatini and Mauritius have met the target, with South Africa and Tanzania also showing considerable potential. Malawi and Mozambique had the most expensive 5GB basket in the SADC region at 46.8% and 32.3% respectively, which is way above the target of 2% of GNI per capita.

Figure 33: Comparison of the Fixed Broadband Basket (5GB) as a Percentage of GNI Per Capita in SADC



Source: CRASA, 2024

4.9. REVISED ITU BASKETS

The ITU revised some of the baskets in the review period where some baskets had their data volume increased. The baskets assist in measuring and comparing the affordability of telecommunications services across countries. Further, they aid policymakers, regulators, and researchers assess progress in digital inclusion and affordability. Table 4 depicts the revised five (5) baskets by ITU. These revised baskets will be used to measure affordability moving forward.

Table 4: ITU Revised Price Baskets

BASKET
1. Fixed – Broadband Basket (5GB)
2. Data-Only Mobile Broadband Basket (5GB) **NEW**
3. Mobile Data and Voice – Low Consumption Basket (70 mins + 50 SMS + 1GB) **NEW**
4. Mobile Data and Voice – High Consumption Basket (140 mins + 20 SMS + 5GB) **NEW**
5. Mobile Data and Voice – High Consumption Basket (140 mins + 70 SMS + 2GB)

Source: ESCCOM, 2025

4.10. SPECTRUM LICENCING

One of the Eswatini government's regulatory functions is the duty to safeguard the use and allocation of the radio frequency spectrum. Users of the radio frequency spectrum are licensed where compliance with the set licence obligations is monitored.

The number of spectrum licences issued in the financial year increased by 34% from 53 to 71. The development was largely due to businesses exhibiting interest in offering services in this part of the ICT sector.

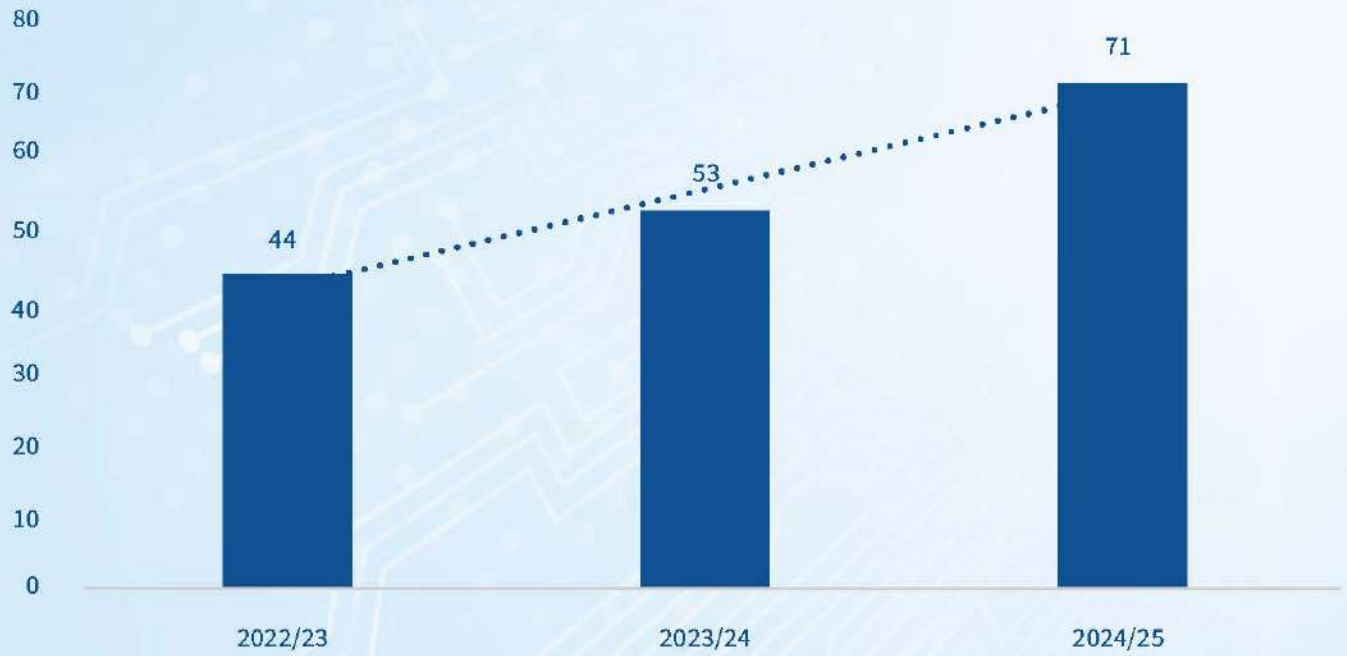
Table 5: Summary of Spectrum Licences Issued

Service Class	Licenses issued		
	2022/2023	2023/2024	2024/2025
Amateur Station	3	4	4
Aeronautical	21	17	17
Sound Broadcasting	3	3	2
Microwave links	4	4	7
IMT	2	0	2
Private Mobile Radio Station (PMR)	4	17	21
VSAT	7	8	7
MES	-	-	1
Alarms	-	-	1
FM	-	-	1
Tower Placement and Maintenance	-	-	8
Total	**44**	**53**	**71**

Source: ESCCOM, 2025

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

Figure 34: Total Number of Spectrum Licences Issued



Source: ESCCOM, 2025

4.11. EQUIPMENT TYPE APPROVAL

Type approval is the process by which communications equipment; such devices and systems are authorised to be imported into the country. The process involves verification of the equipment's compliance with the applicable standards and other regulatory requirements. Type approval is aimed at ensuring the safety and protection of consumers when utilising technological equipment, as well as ensuring that the quality and integrity of communication services is maintained through using quality end-user communication terminals.

Dealers and agents continued to lodge applications for type approval of communications equipment. Table 6 summarises the applications submitted and approved.

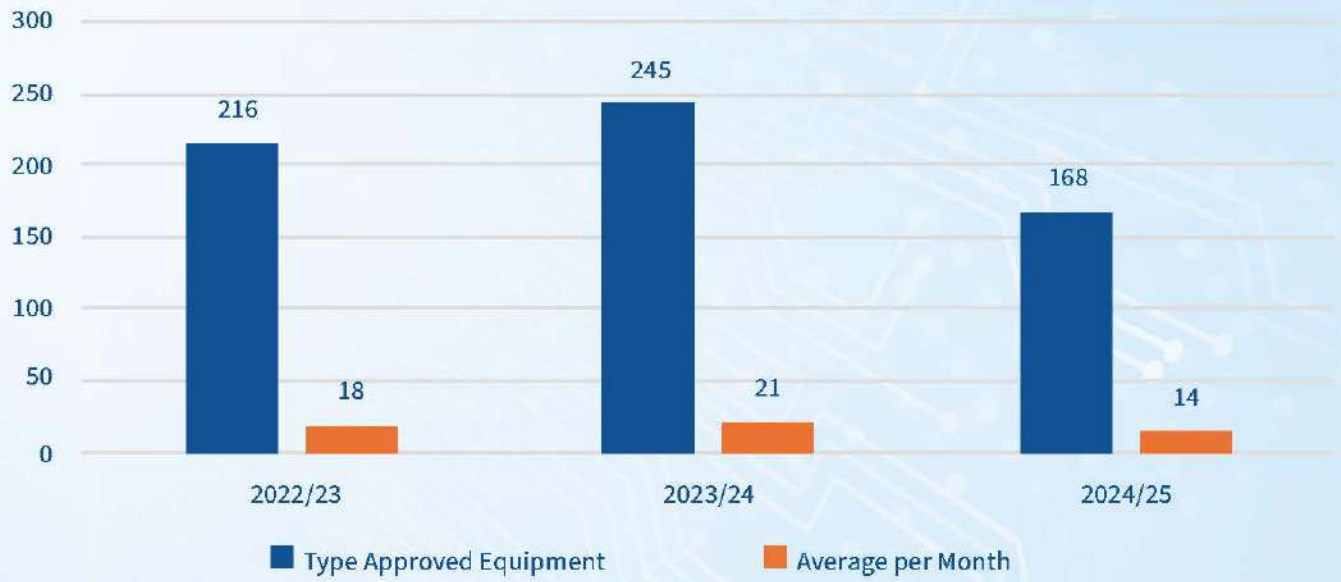
Table 6: Number of Type Approved Equipment

Year	Number of Type Approved Equipment	Average Number of Approvals per Month
2022/23	216	18
2023/24	245	21
2024/25	168	14

Source: ESCCOM, 2025

The analysis revealed a decline in the number of applications for type approval of equipment, as figures decreased by 31.4% from 245 to 168, with an average of 14 approvals per month. Figure 35 depicts the trend.

Figure 35: Total Number of Type Approved Equipment



Source: ESCCOM, 2025

4.12. ICT INFRASTRUCTURE AND COVERAGE

The government monitors coverage to reveal disparities in access to mobile networks, both geographically and by technology, which can inform targeted interventions to bridge these gaps. Monitoring coverage further helps understand the user experience, as different technologies offer different speeds and capabilities. Further, it assists to inform policy decisions and investments in telecommunications infrastructure, ensuring that resources are allocated effectively to improve connectivity.

Monitoring mobile network coverage by technology (2G, 3G, 4G, 5G etc.) is crucial for understanding and improving access to information and communication technology (ICT), which is vital for economic and social development, and for tracking progress towards universal and affordable access to the internet.

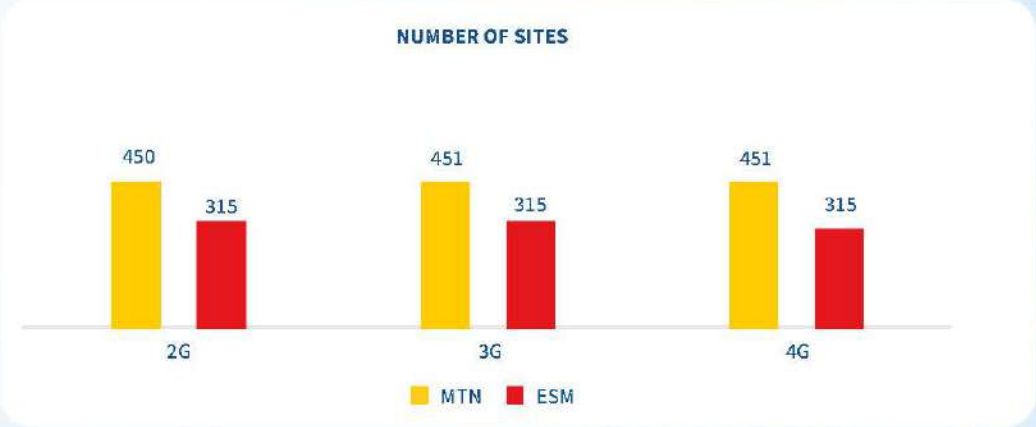
Service providers continued investing in the expansion of network infrastructure for mobile communications, thereby extending geographic and population coverage. Base Transceiver Sites (BTS) for the 2G network improved by 5.8% to 765 sites, extending geographic coverage to 92% and population coverage to 99%. Network sites for 3G grew by 5.8% to 766, with geographic coverage moving to 95.1%, and population coverage growing to 99.1%. For the 4G technology, sites increased by 5.8% to 766, with geographic coverage improving to 90.5%, reaching 95.3% of the population.

Table 7: Number of Base Transceiver Stations and Percentage Coverage

Technology	Number of Sites		% Geographic Coverage		% Population Coverage	
	MTN	ESM	MTN	ESM	MTN	ESM
2G	450	315	92%	95%	99.0%	95%
3G	451	315	95.1%	95%	99.1%	95%
4G	451	315	90.5%	95%	95.3%	95%

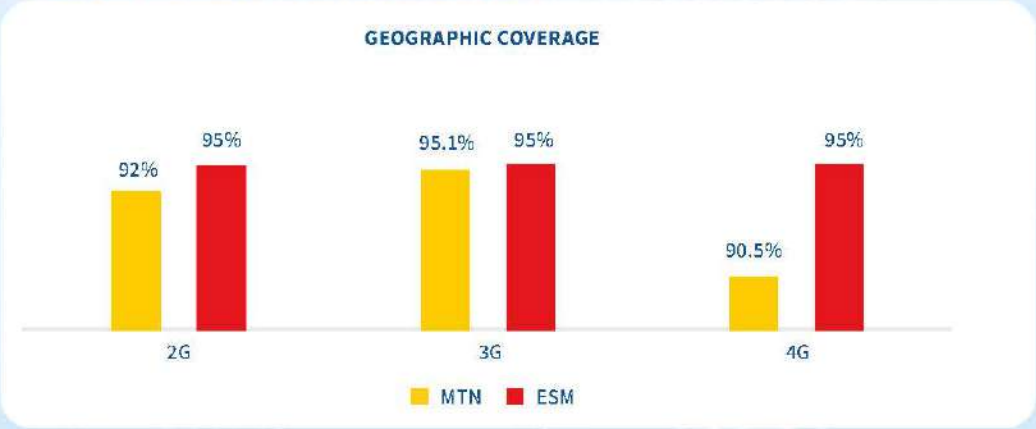
Source: ESCCOM, 2025

Figure 36: Network Total Number of Sites



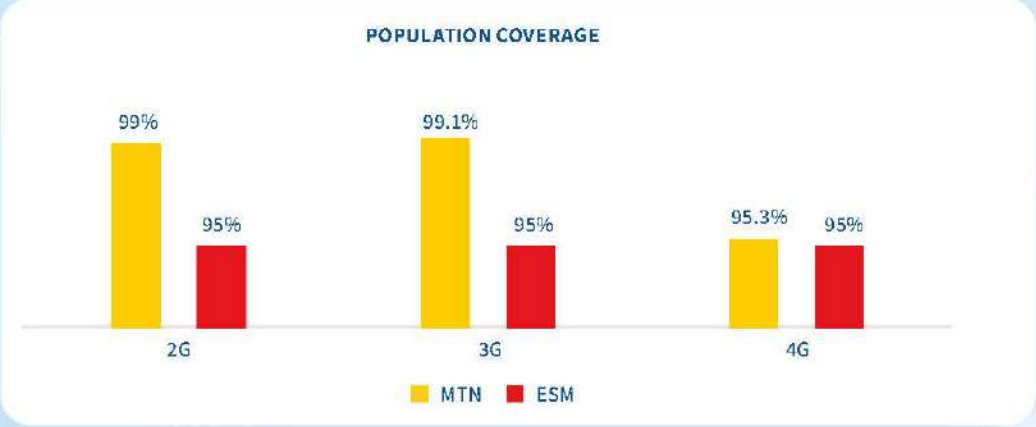
Source: ESCCOM, 2025

Figure 37: Percentage Geographic Coverage



Source: ESCCOM, 2025

Figure 38: Percentage Population Coverage



Source: ESCCOM, 2025

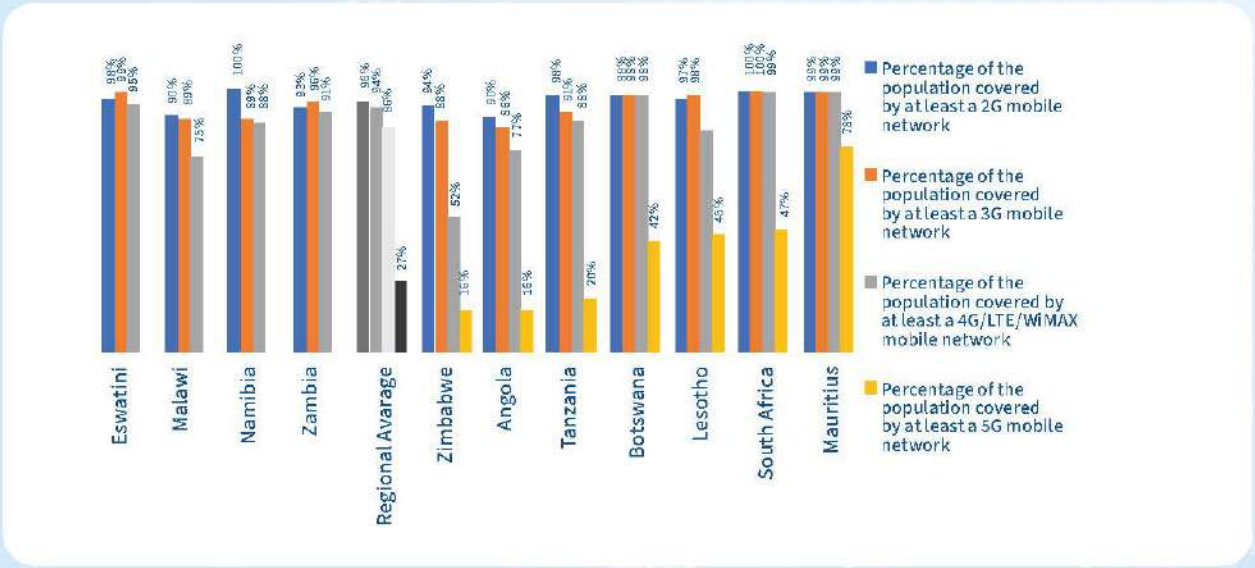
4.12.1. Population Coverage by Type of Mobile Network in SADC

According to the ITU, global network coverage by technology stands as follows: Europe boasts the highest 5G coverage at 72% of the population; followed by the Americas at 63% and the Asia-Pacific region at 62%. Since 5G commercial deployment began in 2019, coverage has increased to reach 51% of the world population in 2024. However, the distribution is very uneven in that 84% of people in high-income countries are covered with 5G, yet only 4% in low-income countries enjoy the same coverage.

The 5G network coverage is much lower in the Arab States at 13%, the Commonwealth of Independent States (CIS) at 12% and Africa at 11%. Where 5G coverage is not available yet, 4G remains a very good alternative, available to 92% of the world population.

The largest mobile network coverage gap is in Africa, where 14% of the population still does not have access to a mobile broadband network and therefore cannot access the Internet[8]. Figure 39 presents mobile network coverage by technology type in SADC.

Figure 39: Mobile Network Coverage by Technology Type in SADC



Source: CRASA, 2024

In terms of the advantages of the 5G network over 4G, 5G coverage is crucial because it offers significantly faster speeds, lower latency, and increased capacity compared to 4G. These features enable new applications and experiences like seamless streaming, virtual reality, and autonomous vehicles, transforming how people live and work. Coverage for the 5G network remains comparatively lower in African countries, primarily due to a combination of economic challenges, infrastructure limitations, and the need for robust supporting infrastructure, as well as device affordability and digital literacy issues.

In the SADC Region, Lesotho and Botswana are currently the leaders in 5G coverage with 45% and 42% of their populations currently covered respectively. Tanzania (20%), Angola (16%) and Zimbabwe (16%) also recorded significant progress in deployment. In Eswatini, Eswatini Mobile successfully rolled out thirty-six (36) 5G base stations in the Matsapha-Manzini corridor in the review period.

[8] *https://www.itu.int/itu-d/reports/statistics/2024/11/10/ff24-mobile-network-coverage*

4.13. MOBILE NETWORK PERFOMANCE

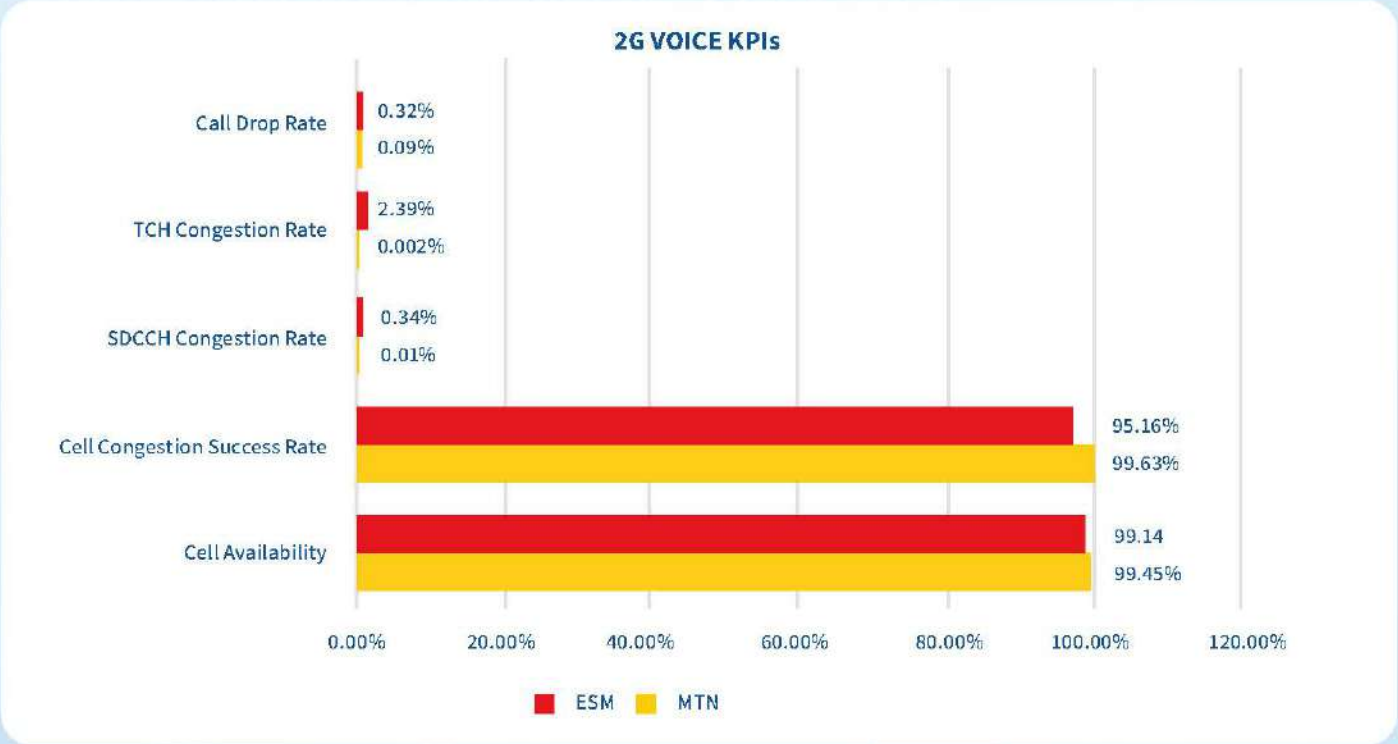
The ITU contends that a telecommunications network is only as reliable as its ability to perform under pressure. Continuous monitoring and in-depth analysis are not just technical necessities, but strategic imperatives to ensure quality, resilience, and trust in a rapidly evolving digital landscape. As data usage and dependence on connectivity continue to grow rapidly, it is critical that networks deliver reliable performance to meet the users' needs. This requires that services are always available to customers at the right and acceptable quality.

Section 7(j) of the ESCCOM Act of 2013, mandates the Commission to regulate, monitor, and review all communication services to ensure that they promote economic and social development. The Quality of Service (QoS) offered by the two (2) Mobile Network Operators (MNOs) was monitored and evaluated against the Key Performance Indicators[9] (KPIs) set out in the Electronic Communications (Quality of Service) Regulations. These measurements were conducted through the combination of a Network Management System (NMS) and drive tests.

In line with the ITU-T recommendations and the QoS regulations, the monitoring of MNOs was focused on four network KPIs across all 2G, 3G and 4G/LTE technologies. These KPIs were network availability (cell availability), service accessibility in terms of the call setup success rate (CSSR), data access success rate (DASR), service retainability as measured on call drop rate and data session drop rate, as well as service integrity as per average user data throughput.

4.13.1. Results of the Network Performance Assessment

The following graphs represent the results obtained for the two mobile network operators, Eswatini Mobile and MTN Eswatini.

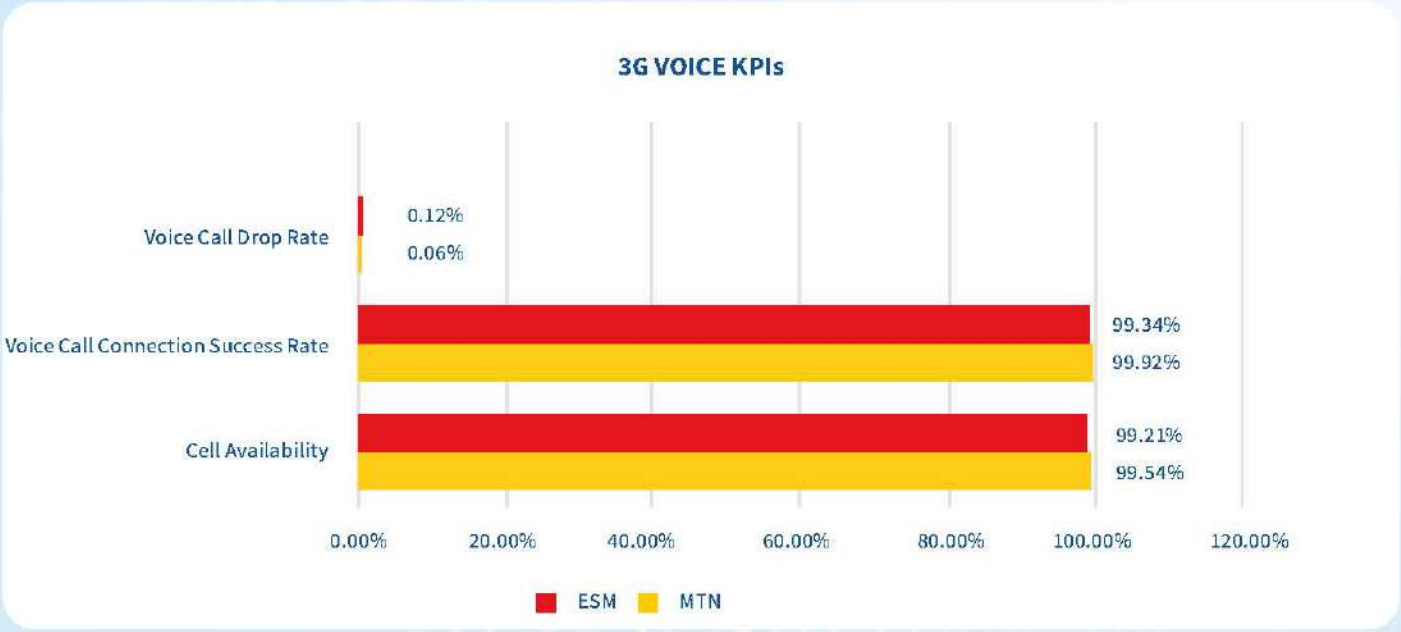


Source: ESCCOM, 2025

[9]*Service Availability (>99%) - Focuses on the percentage of time a network or service is operational and accessible to users during a specified period. Network KPIs include cell availability data service availability, Network downtime (hrs). Service Accessibility (>99%) - Focuses on the probability that a user can successfully access a requested service when they attempt to use it. KPIs include call connection success rate and data access success rate. Service Retainability (<1%) - Focuses on the ability of a network to maintain an active connection without unexpected interruption once the service has been successfully accessed. KPIs include call drop rate, call completion rate, and data drop rate. Service Integrity (DL >20Mbps, UL >4Mbps) - Reflects the accuracy, clarity, and overall quality of the service as experienced by the user, especially in voice and data transmissions. KPIs include user throughput, speech quality, download speed, and upload speed.*

The network performance results for 3G Voice KPIs are depicted in Figure 41 for the two mobile network operators, ESM and MTN Eswatini.

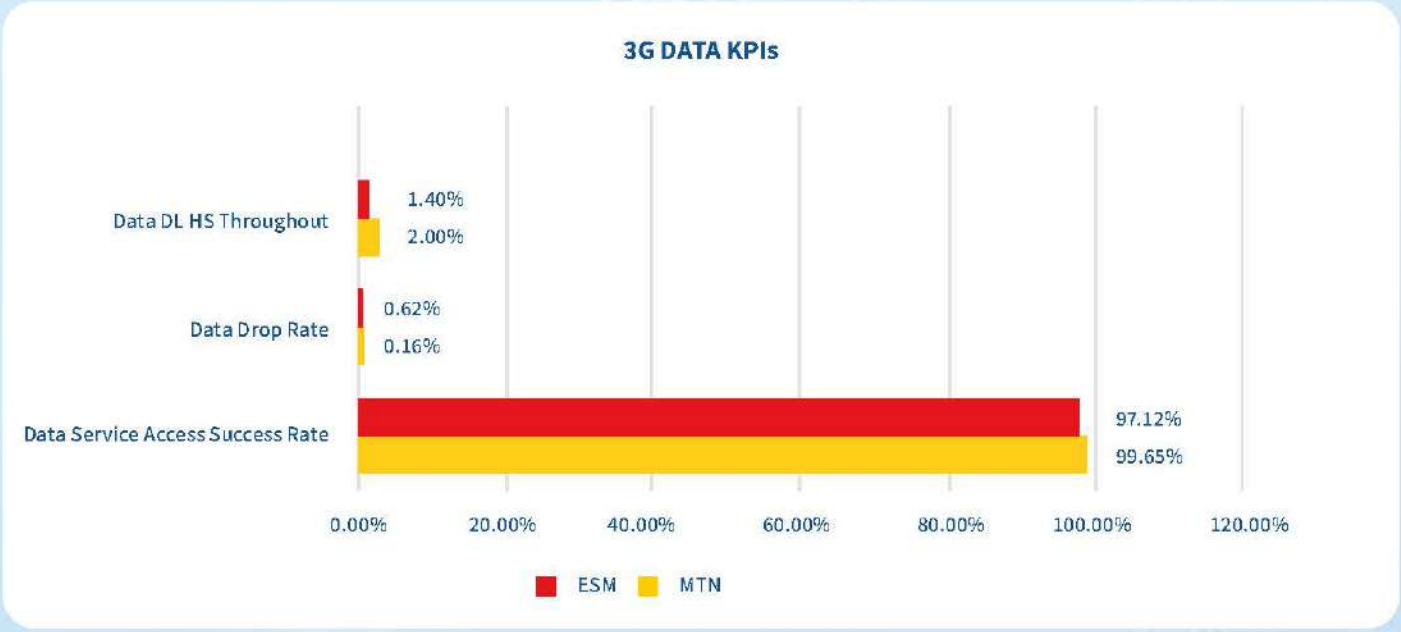
Figure 41: Results of 3G Voice KPIs



Source: ESCCOM, 2025

Figure 42 shows the network performance results for 3G Data KPIs.

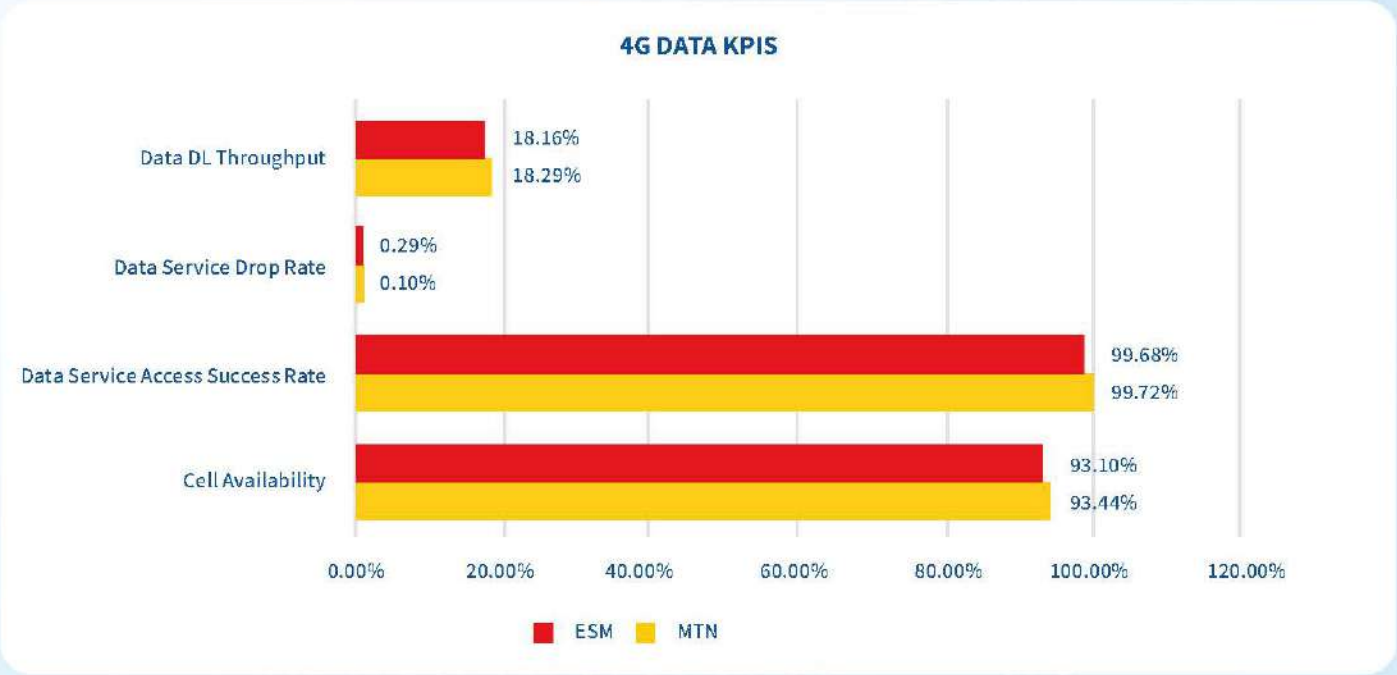
Figure 42: Results of 3G Data KPIs



Source: ESCCOM, 2025

For the 4G Data KPIs, the network performance results are presented below.

Figure 43: Results of 4G Data KPIs



Source: ESCCOM, 2025

Summary of Findings for the Network Performance Assessment

a) Compliant KPIs - ESM and MTN

The results showed that both MNOs complied on the retainability KPI's which are: 3G and 4G Data Service drop rate; 3G and 4G Voice Service drop rate; 4G Data Access Success rate; and 2G & 3G call connection success rate. MTN Eswatini complied with its licence obligations for 2G and 3G but failed to meet the set target of 20 Mbps on 4G user throughput download speed and the target of > 99% on 4G cell availability.

b) Non - compliant KPIs - ESM and MTN

Findings revealed that both MNOs failed to comply with the set targets of >4Mbps for UL and >20Mbps at national level. Since both operators are almost achieving the current target of > 20 Mbps, a revision of this target to 30 Mbps is an option for 4G service availability. Eswatini Mobile failed to meet the accessibility KPIs for: 2G and 3G; 4G user throughput download speed; and the target of > 99% on 4G cell availability.

4.13.3. Mobile Voice Traffic

Despite the growing shift toward data-centric services, voice traffic continues to represent a significant portion of network usage and remains a core service that plays a critical role in accessibility, emergency communications, and overall service quality perception. The total number of Voice sites for the operators stands as follows: MTN has 448 sites, while ESM has 303 sites.

The 3G network remains the dominant technology for voice services. In the review period, 3G voice traffic on ESM was offloaded to the 2G network to ease network congestion. There are immediate plans by ESM to launch VoLTE and VoLTE capable devices. Further, there is need to closely monitor traffic trends in the context of the decision to retire 3G technology as over 50% of the revenue for MTN comes from voice traffic whereas for ESM, about 20% of revenue is generated by voice.

4.13.4. Mobile Data Traffic

As digital services continue to drive socio-economic development, the demand for reliable, high-speed internet continues to grow exponentially. This emphasizes the importance of monitoring data traffic to ensure that networks remain robust, scalable, and inclusive. The total number of Data sites for the operators stands as follows: MTN has 448 sites, while ESM has 303 sites. The 4G network remains the dominant technology for data services.

Eswatini Mobile (ESM) is the dominant operator for data services where ESM's throttling strategy at 20Mbps might have resulted to a huge uptake of data services between 2023 and 2024. However, there are capacity constraints on ESM's 4G network, which have resulted in the operator's 5G network deployment in strategic areas to offload 4G traffic. Investments in the 4G network capacity are necessary as over 80% of the revenue for ESM comes from data traffic. 4G is quickly becoming a dominant technology (a retirement of legacy networks decision) and considerable effort need to be put into ensuring continuous availability of the service.

4.13.5. Performance of the 5G Network

Beyond raw performance metrics, the true measure of a telecommunications network lies in the experience it delivers to end users. Network experience encompasses the quality, consistency and reliability of services as perceived by consumers. These factors directly influence user satisfaction, service adoption, and digital inclusion.

To measure these parameters, the Commission conducts drive-tests and speed tests to ascertain the actual experience for users. The Commission has a duty of assurance that customers should experience services of good and sustainable quality, in accordance with the Quality-of-Service Regulations, 2016. The regulations empower ESCCOM to "measure the quality of service provided by the Service Providers from time to time and compare them with the norms so as to assess the level of performance".

Concerning the 5G network, Eswatini Mobile successfully rolled out thirty-six (36) 5G base stations in the Matsapha-Manzini corridor with a coverage of above 70% in the corridor. The Commission conducted a 5G drive test and speed test exercise in the Matsapha-Manzini corridor in line with its mandate, to ensure that all communications services are provided in a manner that will best promote economic and social development.

The exercise revealed that: the average 5G download speed is around 293 Mbps; 4G average download speed is at 86 Mbps; and the best performing areas are in the N78 Band, 3500 Frequency. The consumption rate on 5G is in multiples of LTE (4G) consumption, suggesting a high /costly service for an average user. Samsung devices currently cannot connect to ESM's 5G network, whereas about 46% of the devices on Eswatini mobile network are Samsung (android) devices.

4.13.6. Data Traffic & Usage

Data usage and user trends were observed to monitor traffic for better informed decision making. From the monitoring, it was observed that infrastructure applications, media streaming and social media are central to data usage. The social platforms most visited by users were TikTok, Facebook, You tube, amongst others.

Table 8: Traffic Monitoring Dashboard

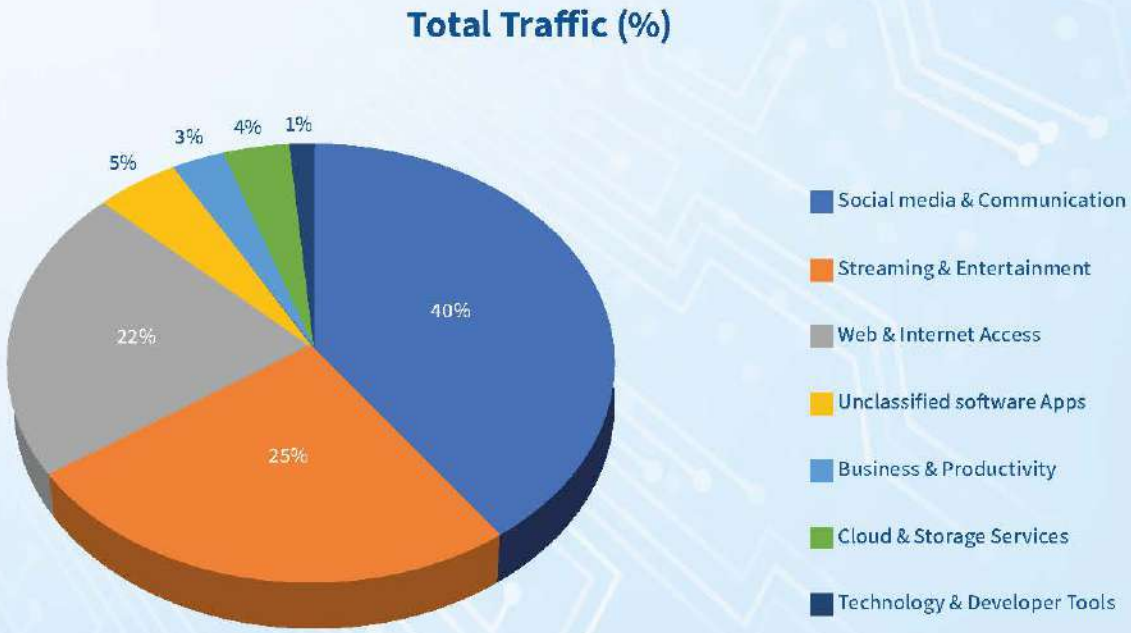
Application	Catergory	Risk	Bytes	Percent
Secure Socket	Infrastructure	1	38438GB	28.59%
TikTok	Mobile Application	4	27814GB	20.69%
Facebook Web	Social Network	3	24056GB	17.9%
Others	Unclassified	?	22946GB	16.88%
YouTube Video	Streaming Media	3	2117GB	15.75%

Catergory	Bytes	Percent
Infrastructure	3889GB	28.93%
Mobile Applications	35396GB	26.33%
Streaming Media	2744GB	20.41%
Social Networking	24613GB	18.31%
Others	8084GB	6.02%

Source: ESCCOM, 2025

Social media, streaming, and entertainment lead as top services which customers utilize the internet for. This implies that over 70% of the accessed content is on foreign servers, contributing to the high internet costs. Therefore, there is a need to localise some of the global giant providers and invest in local content. Eswatini envisages to develop and implement programs aimed at promoting the productive use of the internet, such as e-learning, e-commerce, research and innovation.

Figure 45: Mobile Operators Data Usage Statistics



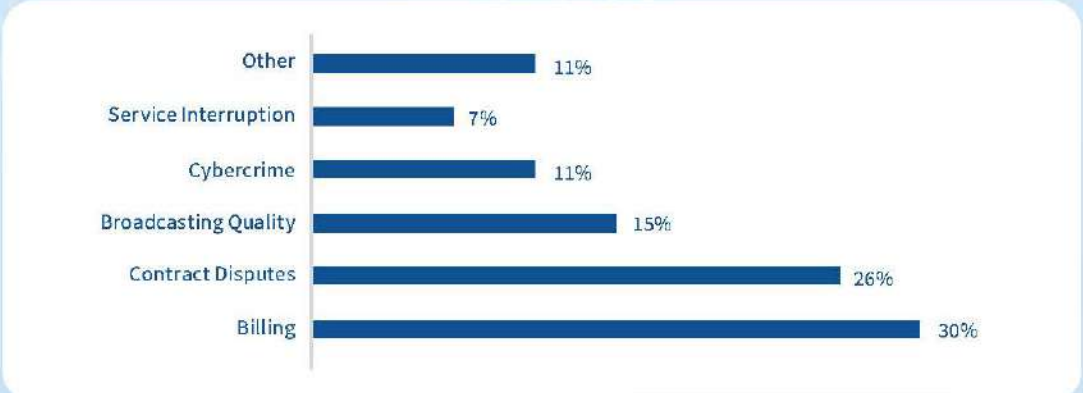
Source: ESCCOM, 2025

4.14. CONSUMER COMPLAINTS

Disagreements occasionally happen in the process of performing service agreements between service providers and consumers. The Commission developed a complaints resolution mechanism to deal with such issues. The service provider is the first point of contact for distressed consumers to seek reprieve, thereafter the matter can be escalated to the regulator if it remains unsolved.

Forty-six (46) complaints were considered in the review period, most of which were against service providers in the telecommunications sector. A bulk of these were on billing and contact disputes. Following engagements with the relevant operators, all complaints were resolved.

Figure 46: Consumer Complaints



Source: ESCCOM, 2025

SELECTED DEVELOPMENTS IN THE ELECTRONIC COMMUNICATIONS SECTOR

05

5.1. POSTAL SECTOR

5.1.1. National Addressing and Postcode Systems Project - Addressing Standard Development

The Commission collaborated with ESWASA (Eswatini Standards Authority) and key stakeholders to develop a national addressing standard, specifically standard ISO 19160-1. Through this process of developing a robust and standardized addressing system, the National Addressing and Postcode System Project envision to enhance the efficiency of mail delivery, improve emergency response services, facilitate accurate navigation and location-based services, and support overall national development initiatives. The ESWASA Technical Committee completed the final draft of the Addressing Standard – ISO 19160-1. Thereafter, a public notice was issued inviting stakeholders to submit their comments on the draft document i.e. a broader public/ stakeholder consultation process commenced.

5.1.2. E-Commerce Strategy Development for Eswatini

This collaborative initiative led by ESCCOM in partnership with the Ministry of ICT and the Ministry of Commerce, aims to advance Eswatini's e-commerce ecosystem. A three-day comprehensive in-country stakeholder engagement was convened, where the lead consultant engaged for the project facilitated discussions with a wide range of stakeholders. These stakeholders were grouped into the following categories: Trade support organizations; Ecommerce businesses and consumers; Fintech and financial services; and Telecommunications services providers. Digital skills development entities and Logistics companies were also part of the stakeholders.

Additionally, a dedicated workshop was held for the E-commerce Technical Group, covering key topics such as the definition of e-commerce, policy best practices, and multilateral, plurilateral, continental, and regional initiatives related to e-commerce. Special attention was given to the AFCFTA protocol on digital trade. The draft E-commerce Strategy document is scheduled for submission in the ensuing period, after which a validation process will be conducted to ensure broad stakeholder input and consensus. E-commerce has, in many countries, proven to be a powerful driver of economic growth, inclusive of trade and job creation. Hence the country's eagerness to engage in and take advantage of the benefits of e-commerce and the digital economy.

5.2. BROADCASTING

In the quest to enable the Broadcasting market, the Commission undertook projects designed to support the broadcasting sector and its stakeholders in enhancing and developing services for the benefit of audiences. These projects consist of the development of the UNESWA Content Production Studio and the procuring of equipment for the Voice of the Church. The equipment will enhance VOC to establish a more stable and reliable studio i.e. transmitter link (Primary STL) for both their SiSwati and English channels as the current links are old analogue links which experience frequent failures. This supports the station's drive to deliver continuous quality services to their audiences.

Further, the configuration of the Network Management Systems (NMS) procured for the Digital Terrestrial Television (DTT) Network was successfully completed. All sites on the systems were loaded, and a Virtual Private Network (VPN) was established by the Commission to interface the MOSAIC Systems (NMS) with the DTT Network, thus enabling communication between the MOSAIC system and the DTT transmitters.

On the capacitation of broadcasters, the Commission conducted training for selected staff of all broadcasting licensees following a discussion with the licensees to identify areas where they required capacity building on. The training aimed to improve skills across multiple media disciplines, including radio and television production, news gathering, digital and technical skills, advertising, sales and media marketing.

5.3. SPECTRUM PLANNING

5.3.1. Spectrum Management

As part of the SADC satellite experts working group, the Commission was involved in the analysis of the proposed SADC subregional network on orbital location 50.95E. This was to ensure the country stays abreast with SADC shared satellite initiatives, to benefit from the SADC satellite programme. Further, a stakeholder consultation forum on the Draft National Frequency Allocation Plan was convened. The plan will guide the allocation of spectrum resources in the country following the amendments made at the last World Radiocommunications Conference in 2023. The Commission further signed a memorandum of understanding (MOU) agreement with the Independent Communications Authority of South Africa (ICASA). The agreement is meant to foster collaboration between Eswatini and South Africa on matters related to cross-border interference and spillage of broadcasting services across the borders of the two (2) countries.

5.3.2. Cybersecurity and Data Protection

The Cybersecurity Agency successfully secured funding from the Foreign, Commonwealth and Development Office (FCDO) under the British government to develop cybersecurity standard operating procedures for law enforcement and judiciary. The purpose of the grant is to enhance Eswatini's capacity to investigate cybercrime, and collect, preserve, and present digital evidence. Further, the Cybersecurity Agency Collaborated with UNESCO in the Community of Practice webinar to equip educators on strategies they can adopt to alleviate issues of cyberbullying in schools.

On the other hand, the Eswatini Data Protection Authority (EDPA) issued three (3) advisory guidelines addressing guidance on the processes to follow when developing a system that processes personal data on a large scale. The guidelines further advise on assessment of whether an organization that collects personal information and imagery of the public using camera and satellite technology, like Google Maps, qualifies for exemption under Section 4 of the Data Protection Act, which pertains to de-identified data. Additionally, guidance was given on evaluating whether company documents were in alignment with the data protection principles outlined in the Data Protection Act.

More significantly, the EDPA commenced development of a comprehensive five (5)- year strategy to guide its operations from 2025 to 2030. This strategic plan will involve stakeholder consultations, data analysis, and the identification of key objectives to align with regulatory and technological changes. The EDPA is committed to completing the strategy by September 2025, ensuring it addresses the needs of organizations and promotes a culture of compliance in data protection practices.

5.3.3. Data Access and Dissemination Policy Validation

The Commission participated in the National Data Access and Dissemination Policy Validation, hosted by the Central Statistics Office (CSO) whose objective was to facilitate multistakeholder collective review and validation of the Data Access and Dissemination Policy draft. The Eswatini Statistical Data Access and Dissemination Policy sets out the rules, guidelines and principles relating to the management, processing, sharing and dissemination of data within the Eswatini Statistical Data Ecosystem of individuals or community groups.

The policy represents a pivotal milestone in the country's endeavours to promote data sharing, transparency, and accountability. It therefore establishes a comprehensive framework for the responsible management, dissemination, and utilization of data, ensuring accessibility to all stakeholders while maintaining confidentiality and security.

SIGNIFICANT ACTIVITIES IN THE ICT SECTOR IN THE PERIOD

06

EXTENSION OF NETWORK INFRASTRUCTURE

Service providers continued investing in the expansion of network infrastructure for mobile communications, thereby extending geographic and population coverage. Base Transceiver Sites (BTS) for the 2G network improved by 5.8% to 765 sites, extending geographic coverage to 92% and population coverage to 99%. Network sites for 3G grew by 5.8% to 766, with geographic coverage moving to 95.1%, and population coverage growing to 99.1%. For the 4G technology, sites increased by 5.8% to 766, with geographic coverage improving to 90.5%, reaching 95.3% of the population.

6.2. PROGRESS IN THE REDUCTION OF COMMUNICATION COSTS

Efforts to reduce the cost of communication continued in the period as MTN reduced its out-of-bundle (OOB) rate from E0.49 to E0.25 per megabyte. At the close of the reporting period, both Eswatini Mobile and MTN offered the same out-of-bundle rate for data. MTN reduced the OOB rate after launching the option for customers to choose either to continue being charged out of bundle once their initial data bundle has been depleted or purchase an additional bundle. There was no tariff adjustment on the voice out-of-bundle rates as both Eswatini Mobile and Eswatini Posts and Telecommunications Corporation (EPTC) had already lowered their out-of-bundle voice tariffs by, on average 50% in the previous period.

Further, Eswatini got closer to attaining Target 2 of the UN Broadband Commission's goal which requires that entry-level broadband services should cost less than 2% of monthly gross national income per capita. The target was met on three (3) Baskets, which are the: Fixed Broadband 5GB Basket; Mobile Data and Voice Low Consumption Basket; and the Mobile Cellular Low Usage Basket. Eswatini ranked 2nd in the SADC region on the Fixed Broadband (5GB) basket after Mauritius. Malawi and Mozambique were the most expensive in the region in terms of costs for this basket.

6.3. RETIREMENT OF LEGACY NETWORKS

The telecommunications sector serves as the backbone of most modern economies and supports various sectors that are essential for economic activities, from efficient delivery of public services, e-commerce to access to education and health services, among others. The sector has become a critical part of everyday life, allowing citizens and businesses to connect and communicate efficiently across the globe and drive global economic growth. The government and relevant authorities are therefore required to put in place relevant frameworks and initiatives that support the deployment and operationalization of connectivity infrastructure in a resource-efficient manner. These initiatives may include determinations on what technologies are fit to best serve the aspirations of the country at large. These are based on the obtaining environment at a particular point in time.

In this context, the Commission issued a proposed decision on the retirement of legacy mobile technologies (2G and 3G) in Eswatini. The retirement process shall be staggered as follows: 2G Network- effective 31 December 2028 while 3G Network - effective 31 December 2030. Further, a ban on the importation of 2G-only and 3G-only devices by 30 November 2025 was imposed, which includes halting equipment type approval for such devices. ESCCOM has the responsibility to ensure that technology utilized within the country is forward-looking and aligned with applicable international trends. In furtherance to that, the Commission is tasked with promoting the interests of end-users and licensees as regards the quality of all communications services and equipment within its remit.

6.4. PROLIFERATION OF SATELLITE TECHNOLOGY

The advancement of Satellite communications technology has been impressive, with the cost of building, launching and maintaining satellites going down. As a result, there has been proliferation of satellite constellations, particularly in the low earth orbit (LEO). Non-Geostationary orbit satellites (NGSO) systems offer several services because of their advantage of orbit location relative to the earth, global footprint and high throughput systems.

NGSO systems offer a compelling value preposition to broadband users for both upstream and downstream markets. In the Eswatini market, there was a noticeable increase in the number of new subscribers switching to satellite services for broadband connections in the period. With the incoming of direct retail services in the form of Direct-to-Device (D2D) services by satellite systems, the competitive constraint on existing terrestrial infrastructure will become increasingly significant.

OUTLOOK FOR THE SECTOR

07

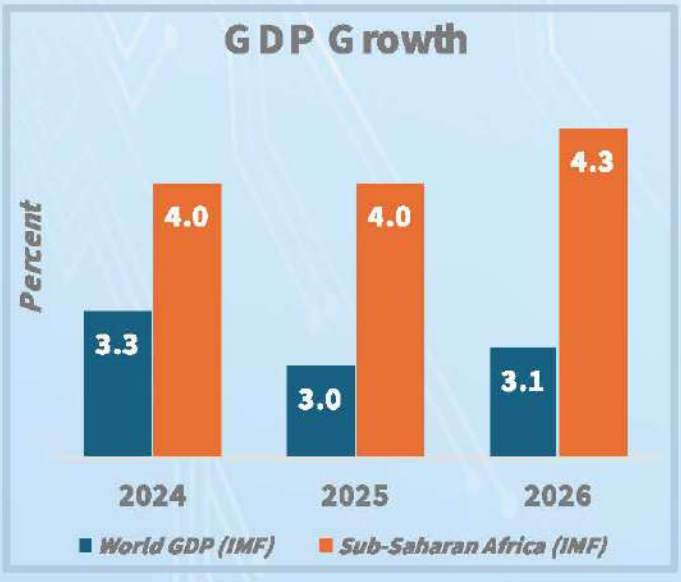
ECONOMIC CONTRIBUTION OF THE ICT SECTOR

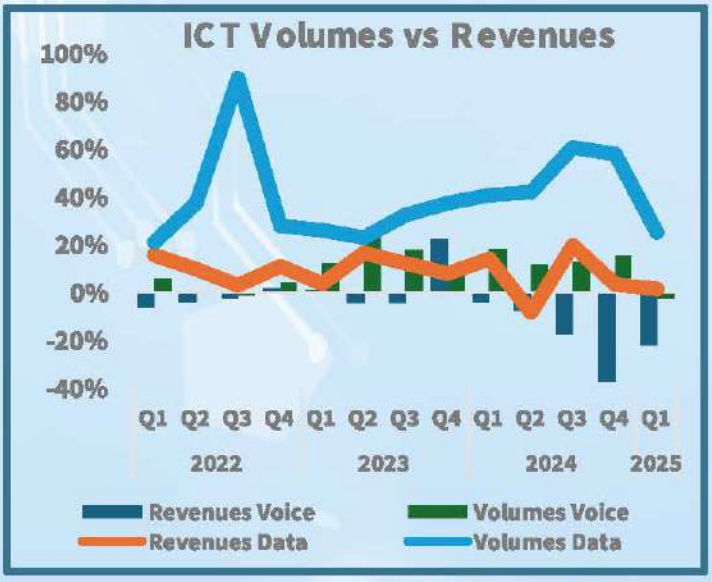
The demand for data is anticipated to persist on a rising trajectory, guided by the ever-increasing uptake of ICT services. According to the Ministry of Economic Planning and Development's (MEPD) GDP Projections and Assumptions 2025 – 2030, the sector has experienced strong growth in recent years. Therefore, slower growth on account of high base effects should be expected going forward.

Further, the projections noted that the scope of investments is limited in the telecoms industry i.e. the financial positions of firms does not finance further investments. The volumes of growth for the services (data, voice) does not match revenue growth. Therefore, for 2025 to the outer years, the ICT sector should expect continued investment on coverage, strength, and spectrum re-allocation to support growth in the short-to-medium term. Continued roll-out of 4G network, and selected 5G-enabled areas, coupled with newer product offerings such as fibre, wireless networks and satellite are expected to drive growth.

Additionally, the conversion from copper-wired technology to fibre-technology is on course and expected to sustain ICT products' demand. Key risks are infrastructure vandalism, and theft of electronic equipment. On the positive side, continued and accelerated conversion of copper-technology to fibre technology shall persist.

Figure 47: ICT Sector Projections





Source:MEPD,2025

ROLLOUT OF THE 5G NETWORK

Eswatini Mobile successfully rolled out thirty-six (36) 5G base stations in the Matsapha-Manzini corridor with a coverage of above 70% in the corridor. The Commission conducted a 5G drive test and speed test exercise in the Matsapha-Manzini corridor in line with its mandate where the exercise revealed that the consumption rate on 5G is in multiples of LTE (4G) consumption, suggesting a high / costly service for an average user. Innovations around optimising costs shall be prioritised.

Some of the key burdens across the region in terms of 5G network rollout relays to the business viability of rolling out the network, with expenses such as cost of mobile base stations, backhaul technology that connects mobile sites to the core network and energy supply. With the success of the ESM rollout on the corridor, operators in the local market are expected continue innovating and expand the 5G coverage to other areas. The commission shall continue monitoring developments in network deployment, network performance and the end-user experience, to guide the market in the right trajectory.

7.3. DATA PROTECTION AND CYBER SECURITY

In the review period, the Eswatini Data Protection Authority (EDPA) established collaborative partnerships with both local and international stakeholders and embarked on institutional capacity building and data protection officer training initiatives. Significant growth was observed through advancements in regulatory enforcement, stakeholder engagement and enhanced public awareness initiatives. The finalisation of the national data protection regulations marked a critical phase in operationalising the Data Protection Act, 2022, and ensuring that its provisions are effectively implemented across all sectors.

Looking forward, the finalization of the EDPA strategy is anticipated. The strategy is aimed at strengthening the EDPA's role as a proactive and responsive regulator, while fostering a culture of compliance, accountability, and trust in data protection practices. The strategy aligns the EDPA's objectives with emerging technological trends, evolving legislative landscapes, and the growing demands of data protection in a digital era.

On Cybersecurity, since the passing of the Computer Crime and Cybercrime and Cybercrime Act 2022, the National Cybersecurity Agency has carried out several activities to build capacity, raise awareness and formulate frameworks in support of the National Cybersecurity Mandate. The 2024 Global Cybersecurity Index (GCI) reported noteworthy progress in Eswatini's cybersecurity maturity, motivated by the introduction of cybersecurity legislation and the establishment of the National Cybersecurity Agency, with the Computer Incident Response Team (Sz-CIRT) acting as the focal point in coordinating cybersecurity incidents.

However, the index also emphasised the need for Eswatini to strengthen its technical capabilities and invest in building a robust domestic cybersecurity sector. Therefore, the country shall be working on these suggested areas moving forward.

CONCLUSION

08

The ICT sector performed quite impressively in the review period, continuing from the growth momentum experienced in the previous period. Mobile cellular SIM subscriptions improved by 11% to 1,742,213 active sim subscriptions, primarily due to the acquisition of multiple SIM cards by subscribers, supported by expansion in mobile cellular network coverage. Resultantly, this extended mobile cellular SIM penetration by 12% to 143%. Similarly, Mobile broadband SIM subscriptions also grew, by 13.5% to 1,432,996. These led to a higher Mobile broadband penetration of 118% from 105%. Growth in mobile broadband subscriptions was attributed to the mounting demand for mobile broadband connectivity, enhanced by encouraging pricing propositions for mobile data and bundled services.

Service providers continued investing in the expansion of network infrastructure for mobile communications, thereby extending geographic and population coverage. Base Transceiver Sites (BTS) for the 2G network improved by 5.8% to 765 sites, extending geographic coverage to 92% and population coverage to 99%. Network sites for 3G grew by 5.8% to 766, with geographic coverage moving to 95.1%, and population coverage growing to 99.1%. For the 4G technology, sites increased by 5.8% to 766, with geographic coverage improving to 90.5%, reaching 95.3% of the population.

Efforts to reduce the cost of communication continued as MTN reduced its out of bundle rate from E0.49 to E0.25 per megabyte. Both Eswatini Mobile and MTN offered the same out-of-bundle rate for data in the period. Further, Eswatini got closer to attaining Target 2 of the UN Broadband Commission's goal which require that entry-level broadband services should cost less than 2% of monthly gross national income per capita.

The target was met on three (3) Baskets, which are the: Fixed Broadband 5GB Basket; Mobile Data and Voice Low Consumption Basket; and the Mobile Cellular Low Usage Basket. Regarding affordability, Eswatini ranked 2nd in the SADC region on the Fixed Broadband (5GB) basket after Mauritius.

Grounded on these assumptions of increased demand for ICT services, the sector is assured to keep growing in the probable future with infrastructure investments to expand network coverage. The Commission shall ensure effective regulation and enablement of the sector to hasten digital transformation for inclusive economic development.


CYBERSECURITY
CIRT

09 APPENDIX

TELECOMUNICATIONS SECTOR 2024/25		% YOY CHANGE
Mobile Cellular Subscriptions	1,742,213	11%
Mobile Cellular Penetration	143%	12%
Mobile Broadband Subscriptions	1,432,996	14%
Mobile Broadband Penetration	118%	13.5%
Fixed Telephone Subscriptions	35,000	-13%
Fixed Broadband Subscriptions	32,744	-3%
Fixed-Wired Broadband Subscriptions	5,255	-47%
Fixed-Wireless Broadband Subscriptions	27,489	15%
Fixed Broadband Penetration	2.69%	-3%
Fixed Broadband Market Shares	100%	0.0%
Eswatini.net	31%	4%
Eswatini Mobile	22%	-3%
MTN	19%	-5%
Real Image	9%	-2%
Jenny Internet	9%	0.1%
Starlink	5%	3.9%
Other(s)	3%	1.6%
Telecommunications Revenue	E2,708,107,594	6%
Fixed Network Operators Revenue	E369,985,432	5.9%
Mobile Network Operators Revenue	E2,338,122,162	5%
Employment in the Telecommunications Industry	957	0.3%
MNOs Employment	266	-7%
Fixed Network Operators Employment	691	3%
Number of Spectrum Licences Issued	71	34%
Number of Type Approved Equipment	168	-31.4%

POSTAL SERVICES SECTOR 2024/25		% YOY CHANGE
Postal Service Revenue	E44,745,064	47%
Domestic Mail	511 301	-21.8%
Domestic Mail Volume (Unregistered Letters)	471 295	-25%
Domestic Mail Volume (Registered Letters)	40 006	60.3%
International Mail	367,394	-34%
International Mail Volume – Outbound mail (Letters)	39,493	-37%
International Mail Volume – Inbound mail (Letters)	327,901	-34%
Packets and Parcels	19,825	38%
International Mail Volume – Outbound (Parcels & Packets)	356	19%
International Mail Volume – Inbound (Parcels & Packets)	19,469	38%
Other Postal Indicators		4%
Express Mail Services (EMS)	251	-1%
Post Boxes Rentals	10 628	-12%
Post Offices - Total Number of Post Offices	35	0.0%
Post Offices - Total Number of Agencies	16	0.0%
Postal Employment	136	-6.6%

BROADCASTING SECTOR 2024/25		% YOY CHANGE
Broadcasting Economic Indicators		47%
Broadcasting Revenue	E24,831,168	13.6%
Employment in the Broadcasting Industry	417	12.4%
Number of Radio Employees	176	8.6%
Number of Television Employees	241	15.3%
Other Broadcasting Indicators		-37%
Number of Productions	10,847	2.6%
Number of Radio Stations	3	0.0%
Number of Set Top Boxes	35 000	0.0%
Number of Television Stations	2	0.0%
Number of Signal Distributors	1	0.0%
Number of Content Distributors	2	0.0%
Number of Pay TV Service Providers	1	0.0%
Post Offices - Total Number of Post Offices	35	0.0%
Post Offices - Total Number of Agencies	16	0.0%
Postal Employment	136	-6.6%

Source: ESCCOM, 2025

DEFINITIONS AND INTERPRETATIONS

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

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

Financial Year (FY) refers to a fiscal year (or financial year, or sometimes budget year) used in government accounting, which varies between countries, and for budget purposes. It is also used for financial reporting by businesses and other organizations. For purposes of this report, the financial year runs from 01 April 2024 to 31 March 2025.

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

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

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

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

Fibre-To-The-Home (FTTH)/Building Internet Subscriptions refers to the number of internet subscriptions using Fibre-To-The-Home (FTTH) or Fibre-To-The-Building (FTTB), at downstream speeds equal to, or greater than, 256[10]kbit/s.

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

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

[10]*ITU definition*

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

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

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

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

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

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

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

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

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

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

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

ESWATINI COMMUNICATIONS COMMISSION

ICT SECTOR REPORT 2025

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