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INDEPENDENT COMMUNICATIONS AUTHORITY OF SOUTH AFRICA

NOTICE 4249 OF 2026

PURSUANT TO THE INDEPENDENT COMMUNICATIONS AUTHORITY OF SOUTH AFRICA ACT, 2000 (ACT NO. 13 OF 2000) AND THE ELECTRONIC COMMUNICATIONS ACT, 2005 (ACT NO. 36 OF 2005)

HEREBY ISSUES A NOTICE REGARDING A QUESTIONNAIRE ON THE ASSIGNMENT OF HIGH-DEMAND RADIO FREQUENCY SPECTRUM

1. The Independent Communications Authority of South Africa ("the Authority") hereby publishes a **Questionnaire on the Assignment of High-Demand Radio Frequency Spectrum** ("the Questionnaire") aimed at developing the Information Memorandum and initiating the process in terms of regulation 7 of the Radio Frequency Spectrum Regulations 2015, read together with section 31 (3)(a) of the Electronic Communications Act, 2005 (Act No.36 of 2005).

2. Interested persons are hereby invited to submit written responses to the Questionnaire, including an electronic version in Microsoft Word, which must be received by the Authority **no later than 16h00 on Monday 30 November 2026**.

3. The Authority seeks information from licensees, interested parties and other industry stakeholders, from Government Ministries, Departments and Agencies ("MDAs") and the public, on several aspects canvassed in this questionnaire.

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4. When compiling the responses in terms of paragraph 2 above, respondents are required to answer the questions using the attached template, which can also be obtained on the ICASA website: https://www.icasa.org.za/pages/second-phase-imt-spectrum-licensing.

5. Persons submitting responses are further invited to indicate whether they wish to meet with the Authority to clarify their responses. Such meetings will not exceed two (2) hours.

6. Written responses must be for the attention of the Project Manager, Mr. Joseph Dikgale, by email to imtlicensing@icasa.org.za and jdikgale@icasa.org.za OR by hand delivery, along with a digital copy on a USB, marked specifically for attention:

Mr Joseph Dikgale

Independent Communications Authority of South Africa

350 Witch-Hazel Avenue, Eco Point Office Park

Eco Park, Centurion

South Africa

0157

7. Written representations should be as detailed as possible and views or opinions expressed should be substantiated, as far as possible, by evidence (e.g. studies, financial or network evidence, stakeholders' own data, or international experience). Assertions that are not supported by evidence will carry less weight. Respondents may include any additional information they consider relevant.

8. Where persons submitting responses require that their response or part thereof be treated as confidential, then an application in terms of section 4D of the ICASA Act, 2000 (Act No 13 of 2000) must be lodged with the Authority. Such an application must be submitted simultaneously with the response to the Questionnaire. All confidential material must be placed in a separate annexure which is clearly marked as "Confidential". A non-confidential version must also be submitted. If, however, the request for confidentiality is not granted, the person making the request will be allowed to withdraw the response or document in question.

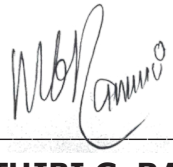
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9. The guidelines for confidentiality requests are contained in Government Gazette No 41839 (Notice 849 of 2018).

10. All written responses submitted to the Authority pursuant to this notice will be made available on the Authority's website, and thus the Authority requests that stakeholders submit a non-confidential version that complies with point 8 above and with the Protection of Personal Information Act, 2013 (Act No 4 of 2013).

11. The Questionnaire and all non-confidential responses received will be uploaded on the ICASA website.

12. All queries or clarity-seeking questions relating to this notice must be directed to Mr. Joseph Dikgale on 012 568 3365 or at **jdikgale@icasa.org.za** and Mr. Samson Kgomo on 012 568 4197 or at **skgomo@icasa.org.za**.



MOTHIBI G. RAMUSI

CHAIRPERSON

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Questionnaire

The Assignment of High-Demand Radio Frequency Spectrum (IMT700, IMT750, IMT800, IMT1500, IMT2300, IMT2600, IMT3300 and IMT3500 bands)

November 2026

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Definitions, abbreviations and acronyms

2022 licences – the spectrum licences issued by ICASA pursuant to the 2022 spectrum auction

BBI - Broadband Infraco SOC Ltd

CAA – Civil Aviation Authority

ECA – The Electronic Communications Act, No 36 of 2005

ECNS – Electronic Communications Network Service, as defined in the ECA

ECS – Electronic Communications Service, as defined in the ECA

HD spectrum – high demand spectrum

ICASA – the Independent Communications Authority of South Africa, formed in terms of the ICASA Act

ICASA Act – the Independent Communications Authority of South Africa Act, No 13 of 2000 (as amended)

I-ECS licence – Individual Electronic Communications Service licence, as defined in the ECA

I-ECNS licence – Individual Electronic Communications Network Service licence, as defined in the ECA

ITA – Invitation to Apply

ROCE – Return on Capital Employed

SDIC - State Digital Infrastructure Company

Sentech – Sentech SOC Ltd

spectrum licence – radio frequency spectrum licence, as defined in the ECA

WACC - Weighted Average Cost of Capital

WOAN – Wholesale Open Access Network

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Introduction

1. The Authority is preparing to determine how best to assign high-demand radio frequency spectrum ("HD spectrum") in the IMT750, IMT800, IMT1500, IMT2300, IMT3300 and IMT3500 bands (the "Phase 2 Bands").

2. In addition, the Authority is considering including the 80 MHz of HD spectrum in the IMT700[1], IMT2600[2] and IMT3500[3] bands that are no longer reserved for the WOAN (the "ex-WOAN bands"), which are also HD spectrum.

3. Before the Authority finalises its determination, it intends to assess how this licensing process will impact competition.

4. It should be noted that this Questionnaire is not a formal competition assessment **but** is the first step towards sourcing information for the development of the Information Memorandum, to be followed by the Invitation to Apply ("ITA") in respect of licensing HD spectrum.

[1] 2 x 10 MHz (FDD)
[2] 30 MHz (TDD)
[3] 30 MHz (TDD)

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Questions

Section 1: Situation since the 2022 assignment process

1.1 What are your overall views on the process conducted by the Authority in 2022 to assign HD spectrum, and on the outcome of that auction?

1.2 Do the definitions or categories of applicants used in that process[4] need to change, and, if so, why and how?

1.3 What would assist a potential applicant for HD spectrum to make an informed decision about whether to apply for HD spectrum in any forthcoming HD spectrum assignment process?

1.4 Are there any actions you consider to be vital to the success of any forthcoming HD spectrum assignment process, from a regulatory point of view? Are there any international trends and developments, risks or other considerations, based on processes conducted for spectrum assignment in other countries, that the Authority should consider, in your view?

1.5 In your view, have there been any significant developments in the electronic communications services and electronic communications network markets that may have impacted the state of competition in those markets? Please describe the developments and provide reasons for any impact you consider that they have had in South Africa's ECS and ECNS markets.

Section 2: Demand by band, quantity and timing

2.1 Pursuant to the amendment to the Policy on High Demand Spectrum and Policy Direction on the Licensing of a Wireless Open Access Network[5], 80 MHz of HD spectrum in the IMT700, IMT800 and IMT2600 bands is no longer reserved for a WOAN. Should any or all this HD spectrum be included in the current process for assignment?

2.2 In your view, should any HD spectrum be prioritised or deprioritised based on current utilisation, demand, or other reasons?

2.3 Specifically, for each band in the Phase 2 Bands and for each band within the ex-WOAN bands, please comment broadly on:

(a) the importance (or otherwise) of the bands to South Africa today;

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(b) how you would rank the bands in order of priority, with reasons (e.g. coverage, capacity, 5G and FWA device ecosystem); and

(c) in your view, is there any evidence that would justify deferring the assignment of any band (e.g. low demand, an immature device ecosystem, or incomplete clearance)?

2.4 In your view, are there any bands other than those referred to above that should be considered for inclusion in any forthcoming licensing process? Please motivate your response.

Section 3: Assignment to or reservation in favour of the SDIC

3.1 The SDIC is intended to comprise a merger or other amalgamation of Sentech and BBI. In terms of the Next Generation Radio Frequency Spectrum Policy of 2024, HD spectrum should be set aside for the SDIC. Given the passage of time and the fact that there may have been significant changes in the market (if this is your view), what should be the Authority's response be to this policy matter?

3.2 Are there any alternatives to a set-aside for the SDIC (e.g. wholesale access obligations on licensees) that could or would meet the same policy objective?

3.3 If HD spectrum must be set aside for the SDIC, what should the Authority consider when considering:

3.3.1 the bands and quantities; and

3.3.2 licence conditions such as open access, wholesale pricing, roll-out deadlines and the return or sharing of unused spectrum?

[4] See Invitation to Apply, published in *Government Gazette* 45628 of 10 December 2021.
[5] See *Government Gazette* 55438 of 25 September 2026.

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Section 4: Use of spectrum assigned in 2022

4.1 Do you think the spectrum acquired by licensees in 2022 is fully utilised? If not, what has prevented its full deployment in your view?

4.2 What current deployment constraints (e.g. wayleave application delays / charges, blockages at municipalities, etc.), if any, would materially limit the ability of successful bidders to use new spectrum?

4.3 **If you were a successful bidder in the 2022 process**, for each band acquired (IMT700, IMT800, IMT2600 and IMT3500), please provide the following information:

(a) by band and in MHz, how much of your spectrum is in commercial use today;

(b) the number of sites or sectors on which it is deployed, and the population coverage achieved, by municipality and by province

(c) the share of that spectrum not yet in commercial use, if any, and the reasons (e.g. device availability, capital constraints, site approvals, DTT interference or power supply);

(d) the number of tower and/or site applications that are pending approval from the CAA or other authorities, if any;

(e) what, if anything, would enable you to use additional spectrum within 24 months of assignment; and

(f) what is your 4G and 5G coverage per province, both by population and by geographic area?

Section 5: Financial capacity and payment structures (confidential)

To assess affordability, please provide **in confidence**:

(a) your ROCE and estimated WACC for the last three financial years; and

(b) the payment structures (e.g. spectrum-for-coverage arrangements, lower reserve prices with higher obligations) that would change your participation

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in any forthcoming HD spectrum assignment process, and to what extent it would do so.

Section 6: New licence conditions

6.1 What are your views on the licence conditions, if any, that should be attached to a new assignment of HD spectrum?

6.2 Should those conditions that were included in the 2022 licences be revised on assignment of new HD spectrum? Please indicate which conditions you are referring to if you are not referring to all of them, with reasons why they should be changed.