

ISPA FNO Perception Survey (August 2024)

ISPA surveys its members on a six-monthly basis to gauge their opinions of South Africa's fibre network operators. After each survey, the scores for all of the rated networks are published on the ISPA web site ([here](#)). This document is an analysis of the August 2024 survey results.

How many ISPs participated and how many networks did they rate?

A total of 44 ISPs responded to the August 2024 FNO perception survey. This is a slight drop in the number of participating ISPs (compared to 50 in Feb 2024 and 48 in Aug 2023), However the responding ISPs contributed 321 ratings, so each ISP rated an average of 7.3 networks each. This represents a jump from 4.8 in Feb 2024 and 5.8 in Aug 2023), which suggests that ISPs are using more FNOs than they were a year ago.

There were a total of 38 networks listed as options in the survey and each of them was rated by at least one ISP. The most rated network (Openserve) was rated by 38 of the 44 respondents.

How did the eight most-rated networks do this time?

Eight operators have consistently been rated by the most ISPs in the perception survey. ISPA's previous analysis compared the overall scores for those eight networks. Here's how they scored in the latest survey:

Fibre Network Operator	Overall score			Change in last six months
	Aug 2024	Feb 2024	Aug 2023	
Octotel	7.1	6.5	6.8	+0.6
Liquid Intelligent Networks	6.7	5.9	4.7	+0.8
Openserve	6.6	6.1	7.0	+0.5
Metrofibre	6.5	6.9	6.8	-0.4
Link Africa	6.2	6.8	5.9	-0.6
Frogfoot	5.4	5.3	6.3	+0.1
Dark Fibre Africa	5.3	5.0	5.8	+0.3
Vumatel	4.7	5.2	6.0	-0.5
Average	6.1	6.0	6.2	+0.1

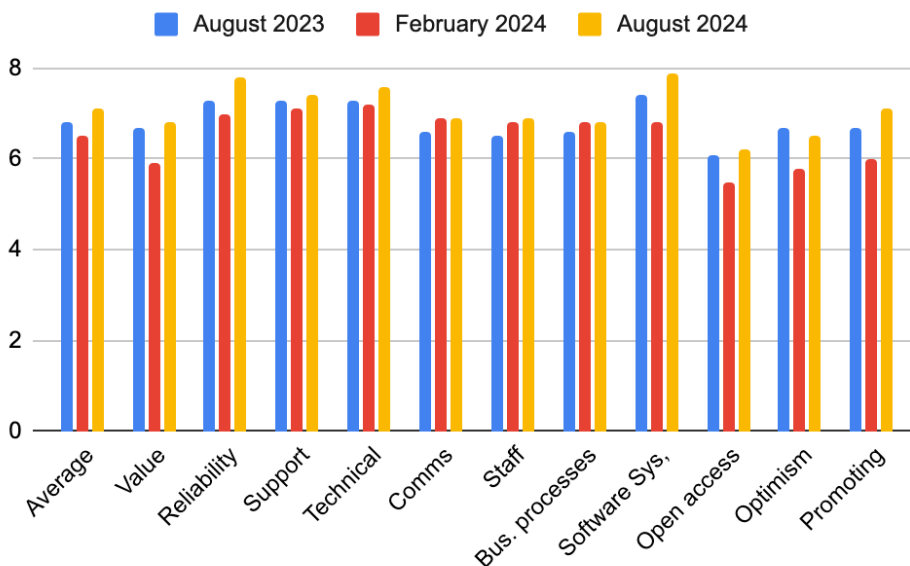
Octotel has displaced Metrofibre as the highest-rated network in the top 8, and Liquid has shown significant improvement, jumping from fifth to second place. Openserve has recovered from a slump six months ago, to move up into third place. Metrofibre and Link Africa were in first and second place in February 2024, but have been displaced to fourth and fifth positions respectively, with slight dips in their average ratings. Frogfoot remains steady as the sixth FNO on the list, while Dark Fibre Africa and Vumatel have switched places at the bottom of the top 8.

A closer look at the strengths and weaknesses of these eight over the last 18 months.

The following graphs show how ISPs’ perceptions of each FNO have changed over the last three surveys, as well as providing a graphic view of each operator’s perceived strengths and weaknesses.

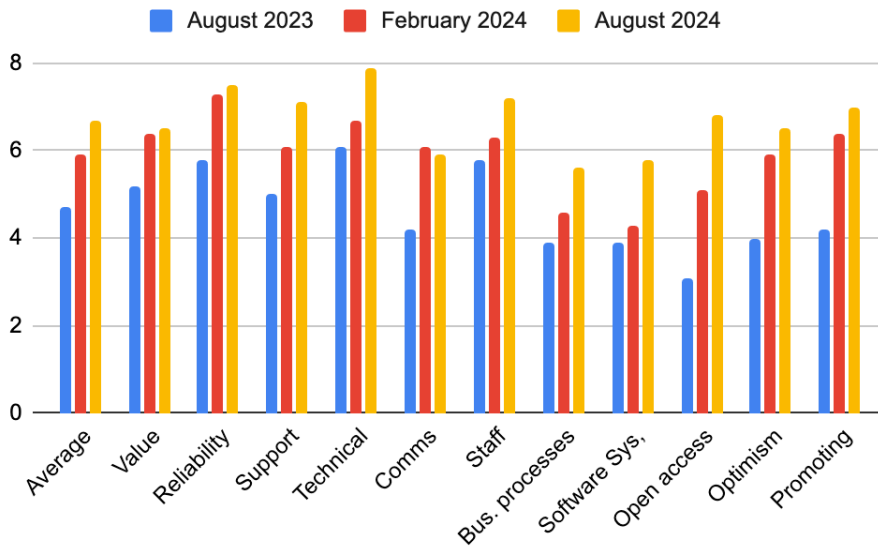
Octotel:

Reliability and good software systems continue to be Octotel’s strengths, but the operator scores solid ratings in nearly every category. There is scope to improve the perception of adherence to open access principles.



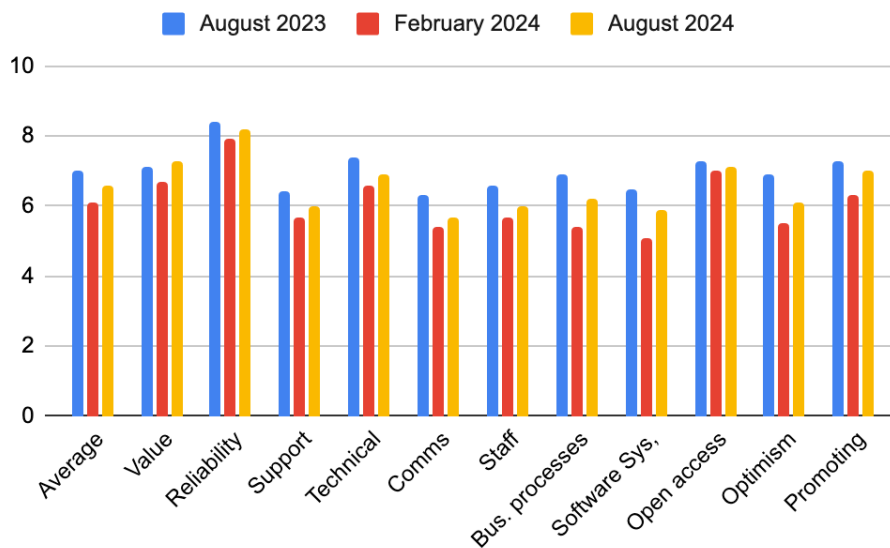
Liquid Intelligent Networks:

Liquid’s significant across-the-board improvements over the last eighteen months stand out. An already solid perception of technical proficiency has improved further. Business processes and software systems are now the weakest scores.



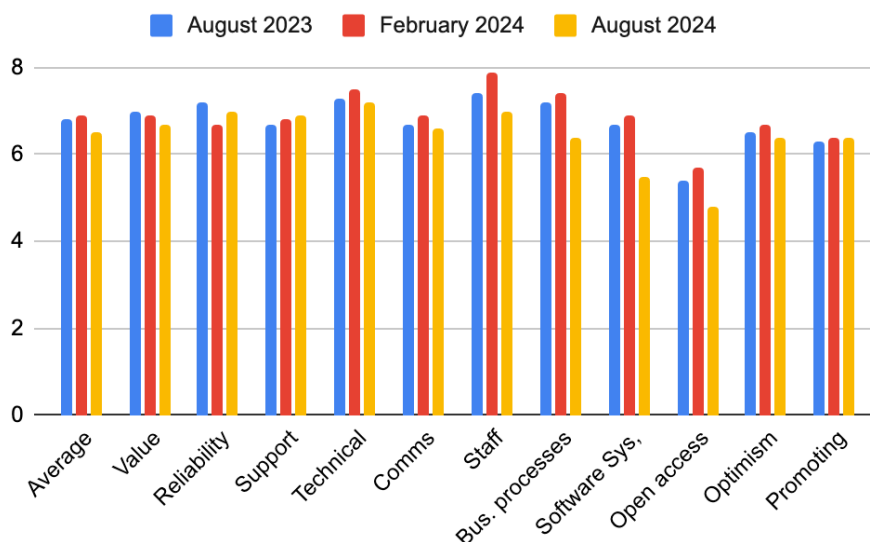
Openseerve:

Openseerve’s perceived reliability continues to be a significant asset for the operator, as well as an appreciation for its open access model and network value. A slight downward trend in the perception of communications and staff is a concern.



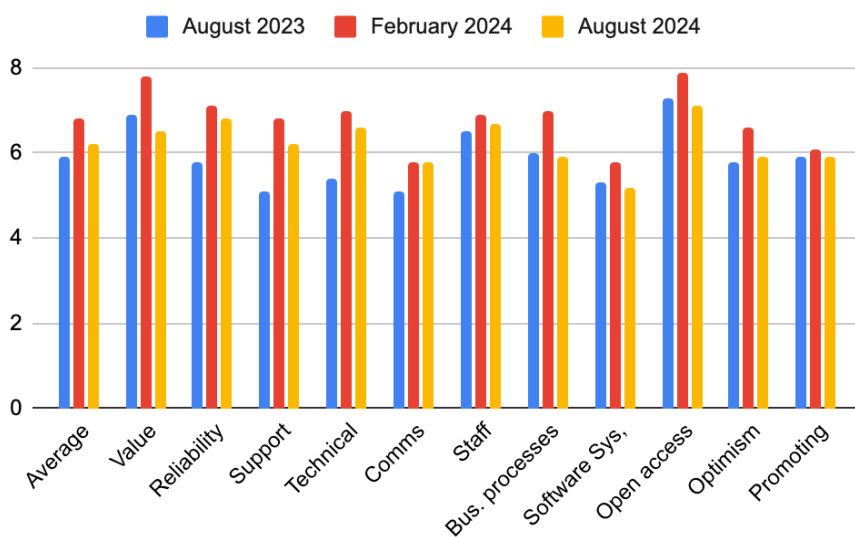
Metrofibre:

Metrofibre’s technical competence, staff friendliness and business processes are all well perceived by ISPs, but the operator scores well in most categories. There is room to improve software systems and perceptions of adherence to open access principles.



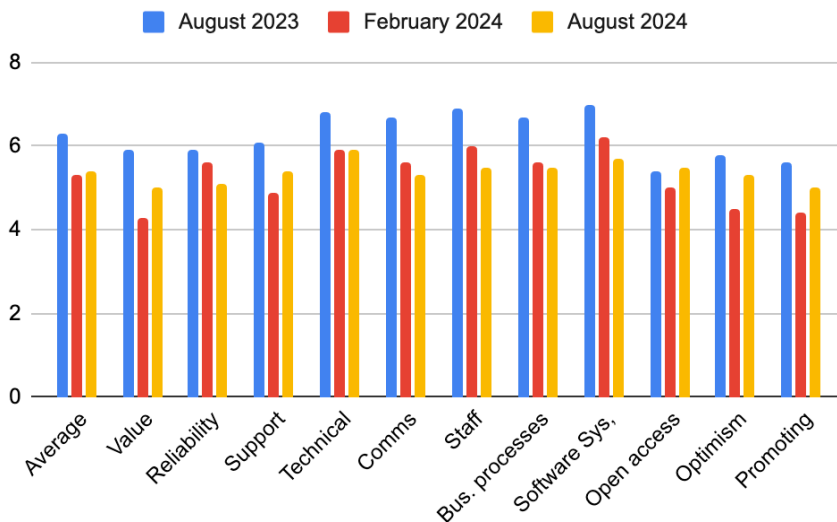
Link Africa:

Value and adherence to open access principles are highly rated by ISPs and improvements in perceptions of support and technical competence have been sustained. Communications and software systems were less favourably rated.



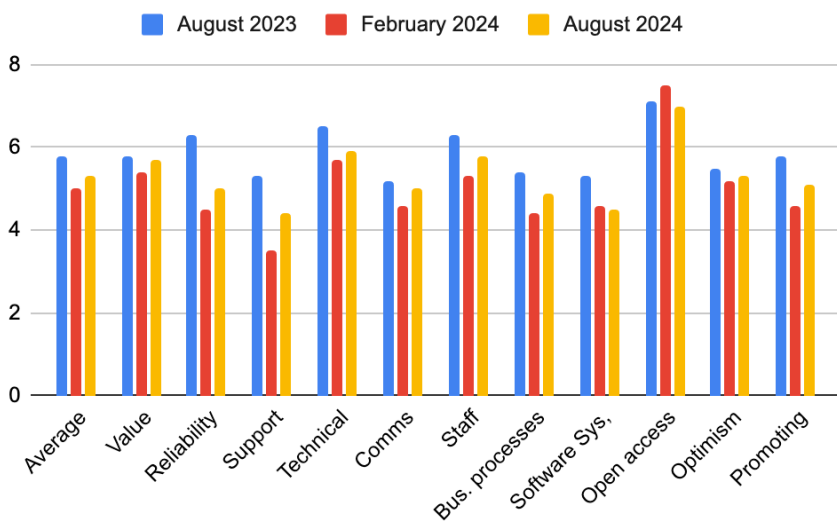
Frogfoot:

Technical competence and software systems are relative strengths for Frogfoot. Optimism that the FNO is improving and perception of value are weaker scores but both have improved since the last survey.



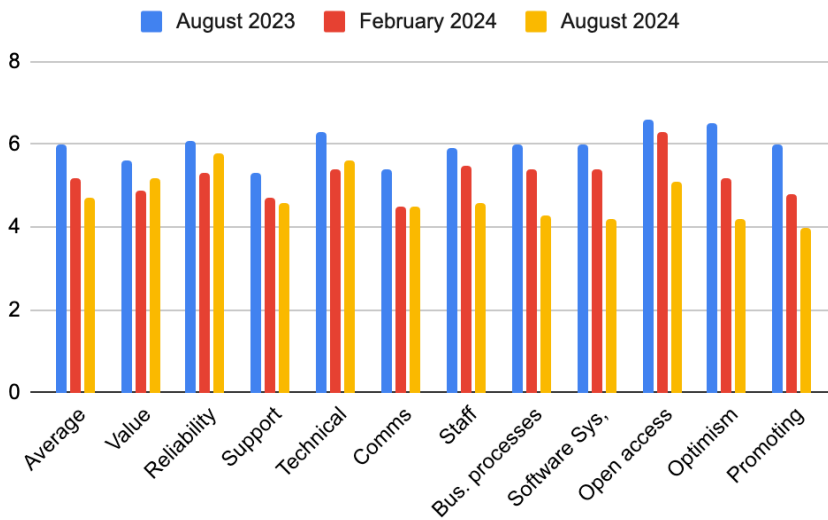
Dark Fibre Africa:

DFA’s approach to open access is the operator’s highest rated characteristic, with technical competence and friendliness of staff also favourably viewed. Support remains the least favourably ranked characteristic but has improved since the last survey.



Vumatel:

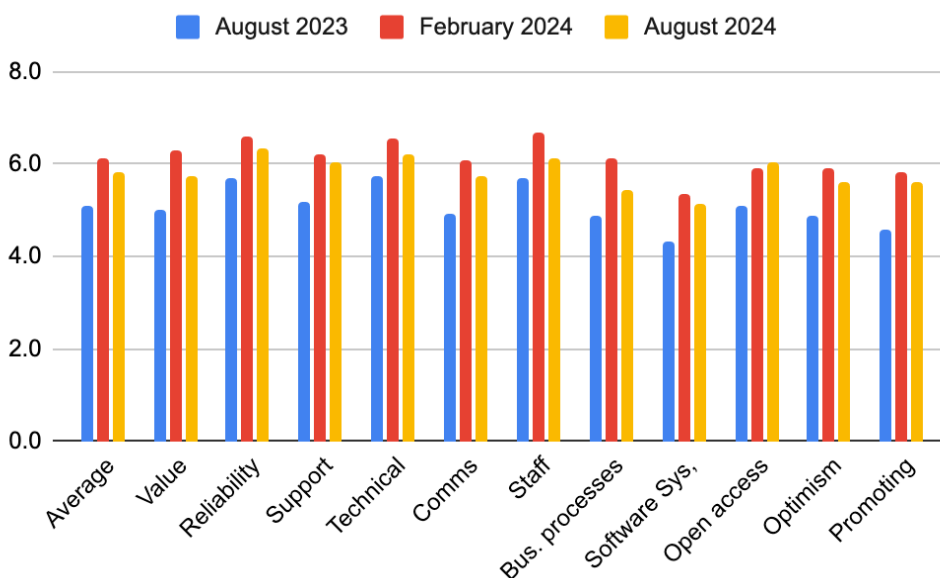
Reliability, value and technical competence are the three areas where Vumatel scores the highest in the most recent survey. Over the last eighteen months, there has been a drop in optimism about this operator and perception of business processes and software systems has also weakened.



How have the individual metrics changed over the last 18 months?

The ratings across all 38 of the FNOs gives us an idea of what ISPs think the strengths and weaknesses of operators are overall.

Reliability, technical competence, staff and support are the best perceived characteristics. Software systems are the least favourably viewed overall, followed by business processes. Overall there has been a slight improvement in ISP perceptions since the first survey.



What about the smaller networks?

ISPA aims to be inclusive when listing potential networks to rate. If at least one ISP wants to rate a network, we'll include it. Obviously, only having a smaller number of ratings for many of the 38 networks listed makes the ratings for those operators less representative. For transparency, ISPA publishes the full survey results, but we only typically compare the eight with the most ratings in our analysis of the results. The appropriateness of this approach is reassessed each time the analysis is done.

Notwithstanding this, there are some upcoming networks whose overall scores are worth commending. All of these were rated by between 3 and 12 ISPs. Comtel (7.5) and FibreGeeks (7.4) score higher than all of the larger FNOs. Nipping at their heels are Purple Forest (7.0). Lightspeed (6.9) and Evotel (6.5). Seacom FibreCo (6.4), Link Layer (6.4), Clear Access (6.4) and Mitsol (6.4) are all rated more positively than several of their larger competitors.

Additional FNOs requested

Survey respondents requested that we add BitCo, Hyperhood and Wecom to future FNO perception surveys.

Bonus question!

For the bonus question in this survey, we asked ISPs to weigh in on the following question:

FNOs are increasingly rolling out fibre in areas that are already covered or partially covered by another FNO. In cases where multiple FNOs offer services in an area, how do you determine which FNO's services to offer to your customers?

Reviewing the twenty three responses to the bonus question:

- Almost all of the responses (19 out of the 23) mentioned reliability (or uptime or stability or outages) as most important or important.
- Nearly as many (17 out of the 23) mentioned pricing or costs as important, but two also mentioned that customers are willing to pay more for more reliable services.
- Six mentioned support for ISPs or support for customers as important.
- Four noted the fault repair times are important.
- Three rated installation times as important.
- Three mentioned the quality or speed of the available services.
- Three referred to the history or reputation of the operator.
- Other factors mentioned were national coverage, the availability of month-to-month contracts, flexibility, ease of interaction, user-friendliness of the sign-up process, and suitability to the customers requirements.

Clearly reliability and pricing drive most ISPs' decision-making when they have a choice of FNO to use in an area, but many other factors can influence the decision.
