



ISPA FNO Perception Survey (February 2026)

ISPA surveys its members on a regular 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 February 2026 survey results.

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

A total of 45 ISPs responded to the February 2026 perception survey, contributing 406 ratings. This compares to previous surveys as follows:

Survey	Participating ISPs	Ratings provided	Ratings per ISP
August 2023	48	276	5.8
February 2024	50	239	4.8
August 2024	44	321	7.3
February 2025	46	355	7.7
February 2026	45	406	9.0

In the last analysis report, we noted that while the number of participating ISPs has remained fairly consistent, ISPs were each rating more networks over time. This trend has continued in the latest survey, suggesting that ISPs have continued to add FNOs to their portfolio.

There were 41 FNOs listed in this survey, but two of the networks were not rated by any ISPs. Openserve remains the most rated network, with 38 of the responding ISPs rating it. MetroFibre is closing in on Openserve's popularity, with 31 ratings. Notably, both of these networks score well in ISPA's assessment of their open access policies.

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 since last year
	Aug 2023	Feb 2024	Aug 2024	Feb 2025	Feb 2026	
Octotel	6.8	6.5	7.1	7.4	7.5	+0.1
Openserve	7.0	6.1	6.6	6.7	6.5	-0.2
MetroFibre	6.8	6.9	6.5	6.7	6.4	-0.3
Liquid Intelligent Technologies	4.7	5.9	6.7	6.1	6.1	0.0
Frogfoot	6.3	5.3	5.4	5.6	6.1	+0.5
Link Africa	5.9	6.8	6.2	6.1	5.8	-0.3
Dark Fibre Africa	5.8	5.0	5.3	4.9	5.8	+0.9
Vumatel	6.0	5.2	4.7	4.6	5.6	+1.0
Average	6.2	6.0	6.1	6.0	6.2	+0.2

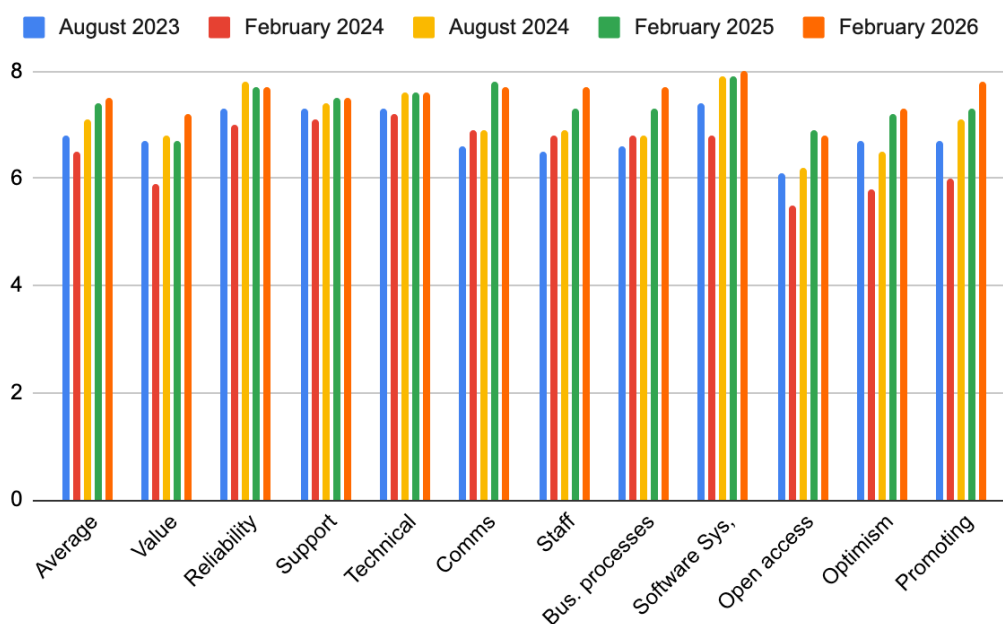
Octotel has retained its position at the top of the chart and even managed to improve its overall score fractionally since last year. Openserve and MetroFibre have also kept their positions in the next two spots, although both experienced a slight drop in their overall score. Liquid remains steady in fourth place. There is good news for Frogfoot, Dark Fibre Africa and Vumatel, with all three getting their highest ratings in three years. Link Africa has unfortunately continued to drop, getting its lowest score since the survey started in 2023.

A closer look at the strengths and weaknesses of these eight

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

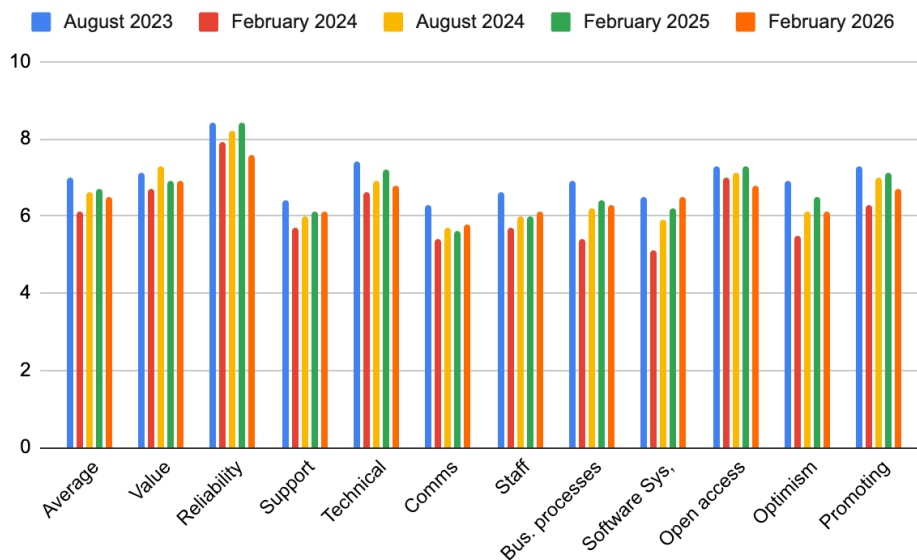
Octotel:

In the last year there were noticeable improvements in four of Octotel's scores, with value for money, likelihood of promoting the network, staff friendliness and business processes all climbing by about half a point. Adherence to open access principles is the only place where Octotel scored lower than 7. Open access is also one of only two scores that dipped marginally since the last survey, the other one being communications. With an average score a whole point higher than closest competitor, Octotel clearly remains an ISP favourite.



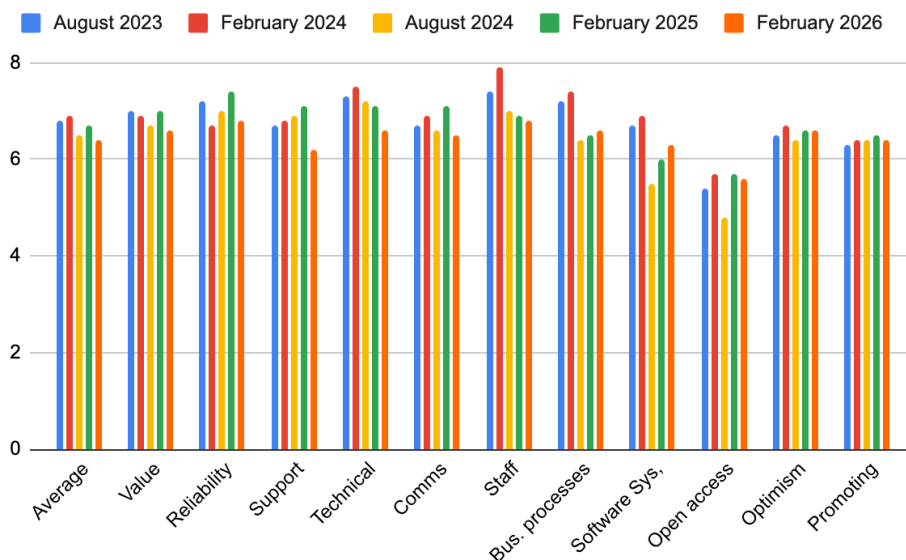
Openserve:

Although it remains the second-highest rated FNO, several of Openserve's scores have dropped over the last year. For the first time since the survey began, Openserve was not viewed as having the most reliable network, slipping to second place behind Octotel. This drop in ISPs' perceptions of Openserve's reliability is slightly offset by improvements in software systems. Although the scores for both communications and staff friendliness improved slightly, these remain two of the lowest scores and will need to improve for Openserve to regain the top spot on the scorecard that it held in 2023.



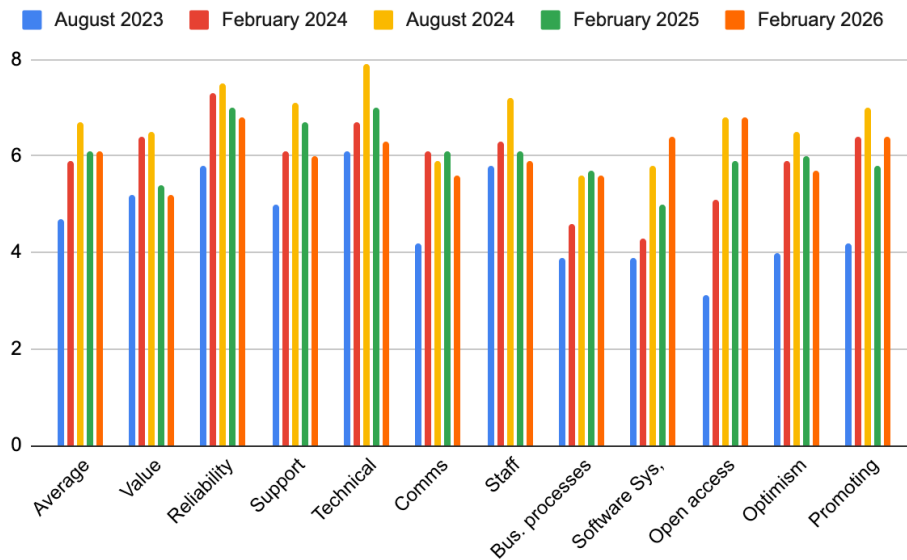
MetroFibre:

MetroFibre remains the third-highest rated FNO overall, but was one of the two networks whose scores dropped the most over the last year, getting its lowest overall score since the survey began. MetroFibre's score for support fell the most — nearly a whole point, with reliability and communications also taking a hit. ISPs' perceptions of adherence to open access principles also remains a problem area. Some good news is that MetroFibre's scores for business processes and software systems have improved.



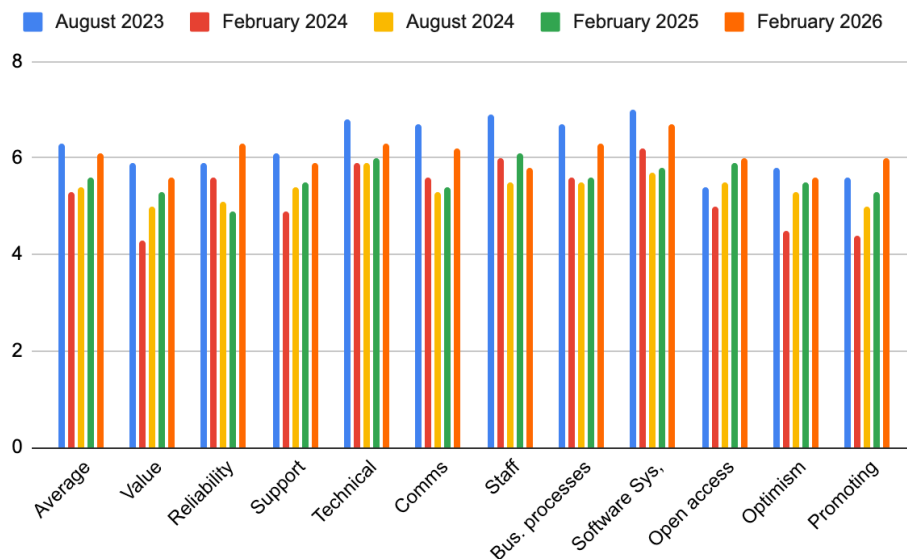
Liquid Intelligent Technologies:

In the last survey results, it was noted that Liquid was the network with the most volatile rankings. While Liquid's average score defies this trend by remaining exactly the same as last year's, scores for individual metrics remain volatile. There was a large improvement in the score for software systems, and both adherence to open access standards and likelihood of promoting the network improved significantly. On the other hand, scores for support and technical proficiency dropped, and value for money remains a vulnerability for Liquid.



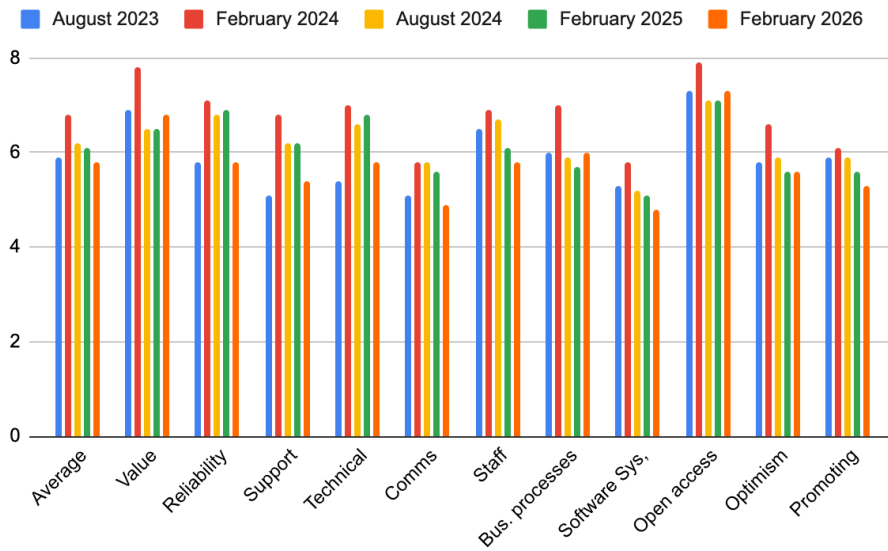
Frogfoot:

Frogfoot's average rating improved by half a point, pushing the operator into joint fourth place on the rankings. Reliability of the network jumped by a commendable one and half points, and there were also significant improvements in software systems, communications and likelihood of promoting the network. Overall, Frogfoot saw improvements in every metric except staff friendliness, which dropped slightly. Perceived value for money remains a weakness, but has improved steadily and substantially over the last two years.



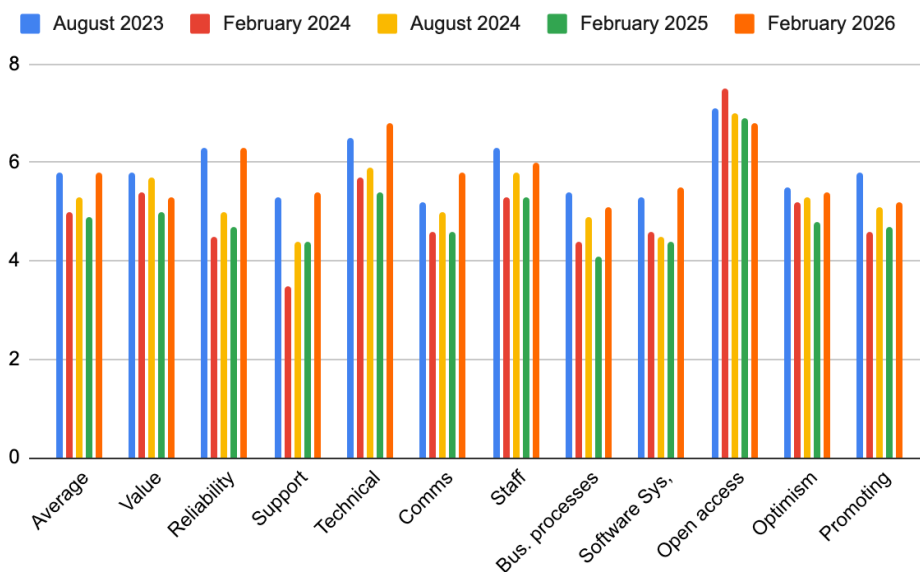
Link Africa:

Link Africa has slipped from tied fourth place in February 2025 to tied sixth place on the latest rankings, continuing a steady drop from its second place position two years ago. Slight improvements in value for money and business processes are not enough to offset significant drops in reliability, support and communications. Link Africa's is now in the unfortunate position of being lowest ranked for reliability, technical proficiency, communications and software systems out of the eight major networks.



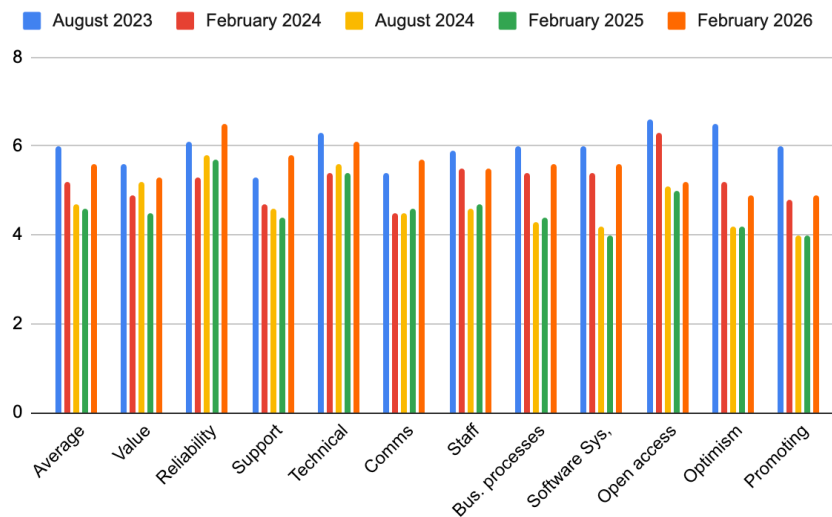
Dark Fibre Africa:

Although they are still tied for sixth place on the rankings, Dark Fibre Africa is the second most improved network since the last survey, with an average that has improved by nearly one point. Five scores have increased by a point or more: technical proficiency, software systems, support, business processes, and most commendably reliability, which jumped by more than one and a half points. Although it remains one of Dark Fibre Africa's overall strengths, perception of adherence to open access principles was the only score that dropped, albeit very slightly.



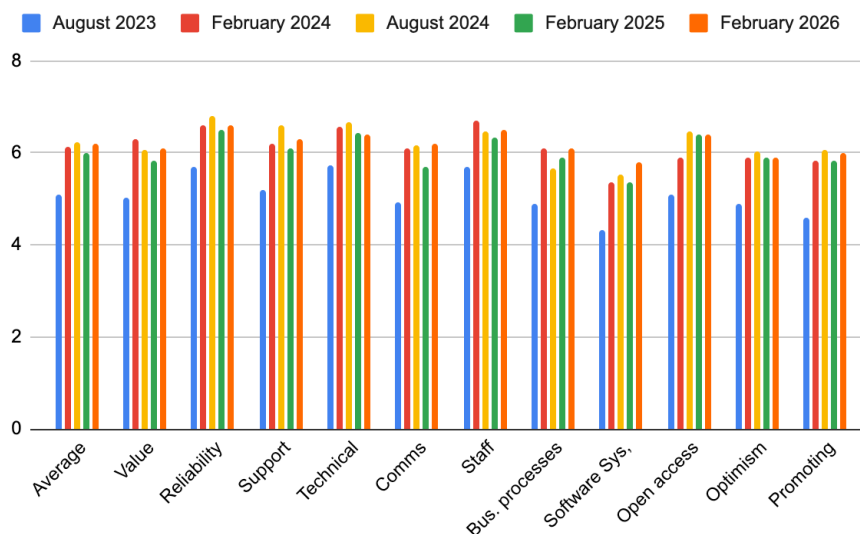
Vumatel:

Vumatel is still lingering in eighth place on the rankings, but was the most improved network over the past year. It was the only network to increase every single score, with key areas of support, communications, business processes, and particularly software systems all seeing significant upward movement. Vumatel's two weakest scores are optimism that the network will improve and likelihood of promoting the network, but if the operator can keep the momentum going on its other improvements, these two scores are likely to follow, and place Vumatel in a stronger position in the next survey.



How have the individual metrics changed over the last few years?

The ratings across all 39 of the FNOs give us an idea of what ISPs think the strengths and weaknesses of South African operators are overall. The top four metrics remain the same as they were last year: reliability, staff friendliness, technical proficiency, and adherence to open access. The most improved scores across all networks since the last survey are communications and software systems. Notably, none of the overall scores has dropped since 2025, suggesting that the perception is that FNOs are tending to move in the right direction.



Which networks are ISPs using?

As was noted in the beginning of this analysis, ISPA tracks its members' perceptions of more than forty networks. Of these, thirty-nine received at least one rating in the last survey. The number of ISPs taking the time to rate each network provides some indication of the relative number of ISPs selling services on each network. In the most recent survey, there were twenty FNOs rated by at least eight ISPs.

Fibre Network Operators	No. of ISPs rating	Average score
Openserve	38	6.5
MetroFibre	31	6.4
Frogfoot	28	6.1
Dark Fibre Africa	27	5.8
Vumatel	27	5.6
Octotel	18	7.5
Liquid Intelligent Technologies	17	6.1
Link Africa	17	5.8
Thinkspeed	13	6.2
Vodacom South Africa	13	4.4
Zoom Fibre	13	5.0
Open Fibre	12	7.0
Lightspeed (Cybersmart)	11	7.1
WECOM	11	6.6
Lightstruck	10	7.0
MTN	10	5.7
TT Connect	10	5.6
Evotel	8	6.9
Link Layer	8	6.5
Seacom FibreCo	8	6.9

Six of the FNOs on this expanded list achieved average scores placing them above most of the major eight networks: Lightspeed (Cybersmart), Open Fibre, Lightstruck, Evotel, Seacom FibreCo and WECOM. These are networks to watch as potential challenges for the top eight as they continue to grow.
