

Maps, opinions and best practices: ISPA's fibre projects

(24 April 2025)



Opinions, maps and best practices

These are mostly projects of ISPA's Fibre ISP WG

- The Fibre ISP Working Group meets monthly and splits its time between sharing FNO war stories and overseeing fibre-specific projects. It is open to ISPs who don't have common shareholding with any FNO.

Project 1: FNO Perception Survey — February 2025 report

Project 2: Mapping open access networks — Phase 2 maps

Project 3: Best Practice Recommendations for FNOs and ISPs

FNO Perception Survey

- Run every six months (for the last two years).
- ISPs rate aspects of FNOs they do business with on a scale of 0 to 10.
(Important to stress that the survey measures ISPs' perceptions.)
- The survey is entirely anonymous and aims to be inclusive of FNOs.
- The full results are published on the ISPA website.
(February results will be published next week.)

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

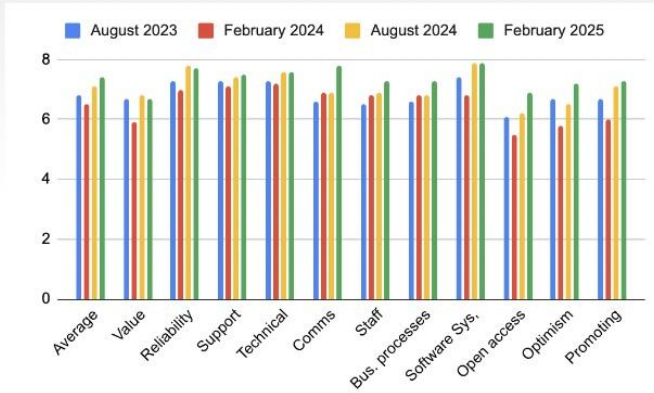
FNO Perception Survey: February 2025

Fibre Network Operator	Overall score				Change in last six months
	Feb 2025	Aug 2024	Feb 2024	Aug 2023	
Octotel	7.4	7.1	6.5	6.8	+0.3
MetroFibre	6.7	6.5	6.9	6.8	+0.2
Openserve	6.7	6.6	6.1	7.0	+0.1
Link Africa	6.1	6.2	6.8	5.9	-0.1
Liquid Intelligent Networks	6.1	6.7	5.9	4.7	-0.6
Frogfoot	5.6	5.4	5.3	6.3	+0.2
Dark Fibre Africa	4.9	5.3	5.0	5.8	-0.4
Vumatel	4.6	4.7	5.2	6.0	-0.1
Average	6.0	6.1	6.0	6.2	-0.1

FNO Perception Survey: Operator Profiles

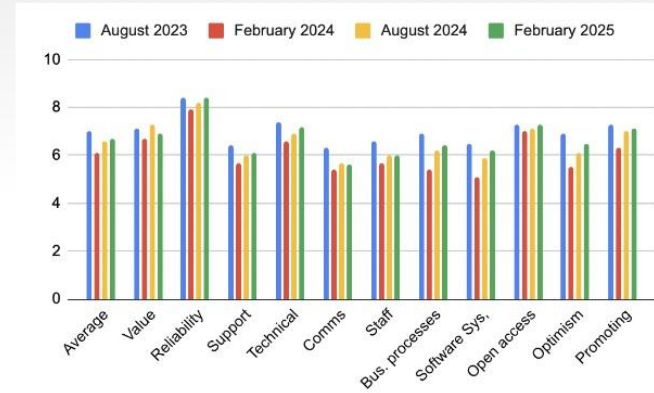
Octotel

Software
Reliability
Communications



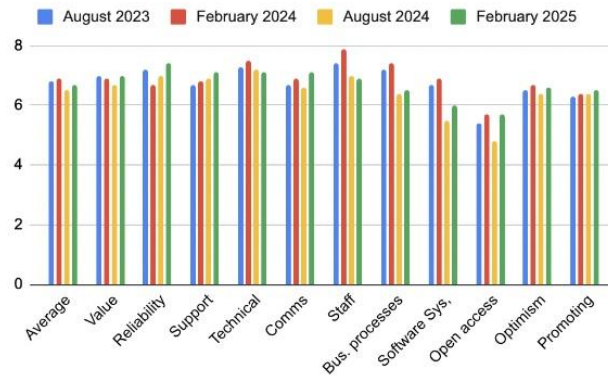
Openserve

Reliability+
Technical
Open access



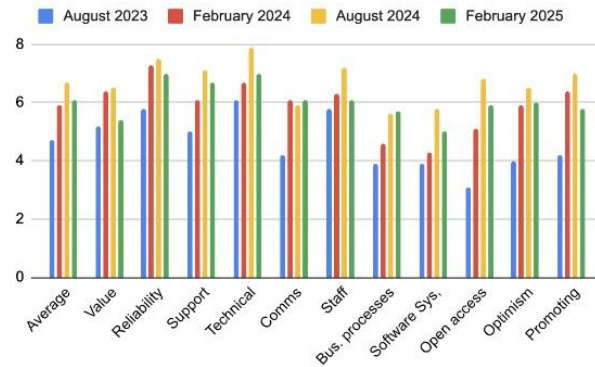
MetroFibre

Reliability
Support
Technical
Staff



Liquid

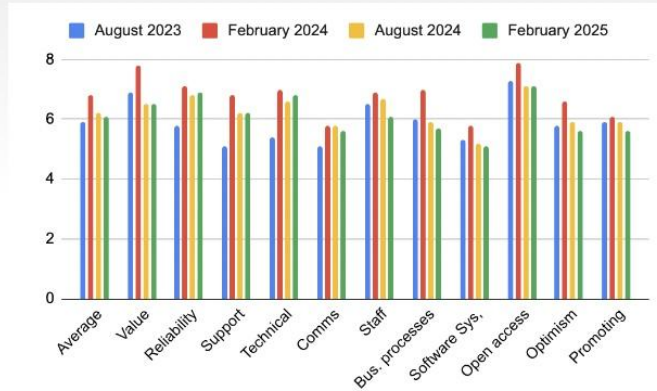
Reliability
Technical
Support



FNO Perception Survey: Operator Profiles

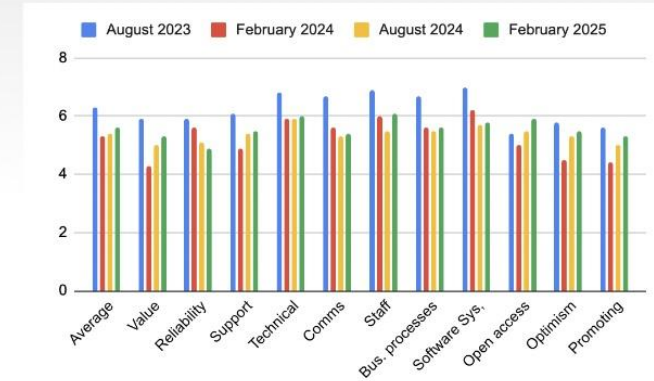
Link Africa

Open access
Reliability
Technical



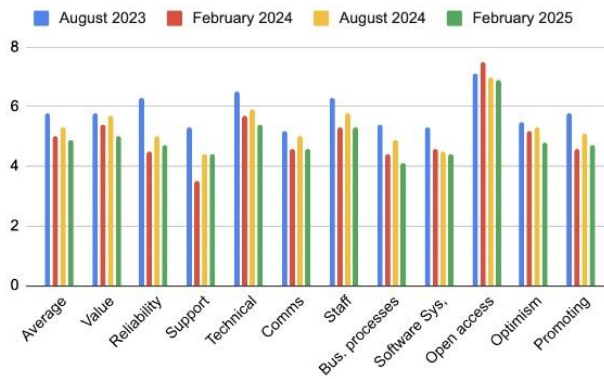
Frogfoot

Staff
Technical



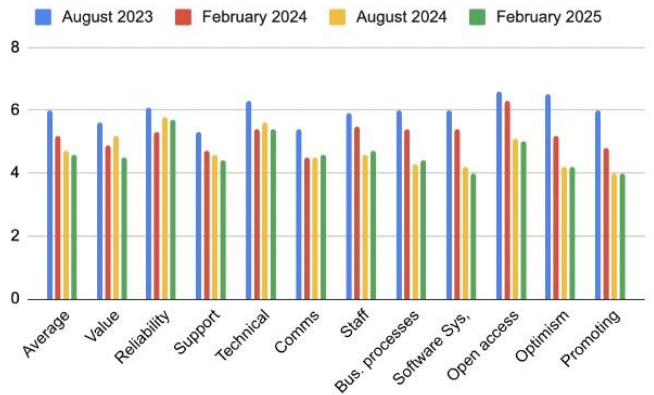
DFA

Open access



Vumatel

Reliability
Technical



FNO Perception Survey: More networks

Fibre Network Operator	Overall score				Change in last six months
	Feb 2025	Aug 2024	Feb 2024	Aug 2023	
Lightspeed (Cybersmart)	7.1	6.9	6.8	7.2	-0.2
Lightstruck	7.0	4.9	6.5	4.4	+2.1
Open Fibre	6.8	5.5	5.7	1.5	+1.3
Evotel	6.5	6.5	7.5	6.1	-
Thinkspeed	6.2	5.2	6.1	4.7	+1.0
TT Connect	5.6	5.1	5.2	6.0	+0.5
Vodacom South Africa	4.8	3.7	4.2	4.1	+1.1
Zoom Fibre	4.8	5.5	7.4	7.2	-1.3

FNO Perception Survey: Bonus Question

What does this FNO do better than other FNOs that you'd like to see other FNOs learn from?

- **Clear Access** responds quickly to queries and does not change its packages and pricing often.
- **Connectivity Services** has very neat patching.
- **Dark Fibre Africa** is reliably open access in its approach, and treats all ISPs equally. The company has great account management and solid ordering processes and feedback for enterprise services.
- **DNATel** has very good systems, support and communications, including daily communications via WhatsApp. Customers are attended to ASAP.
- **FibreGeeks** line “suspend” feature where the ISP is not charged and the customer cannot migrate was commended.
- **FibreSuburb Networks** is very responsive when asked for assistance.
- **Frogfoot** is good at communicating planned maintenance and at updating tickets. Their [beta map](#) is quite good, and the company makes it easy to find the ONT and OLT signal levels.
- **Link Africa** seems to be committed to open access principles.
- **Liquid Intelligent Technologies** listens to customers and makes customers think of them as a partner rather than a supplier.
- **MetroFibre** has clear policies and a friendly system. Their DC-to-DC pricing is very good, and they are willing to engage for enhanced pricing.
- **Octotel** is continuously improving and a pleasure to deal with. They have an easy-to-use portal, and an API that works well. They are an ISP-friendly company with retention products, incentives and staff who are willing to assist.
- **Open Fibre** is very well run, with good processes, support and systems.
- **Openserve** is exceptionally stable and has a very reliable network. The uptime and quality of their enterprise services cannot be beaten. They have clear processes and make it easy to migrate customers. They are always willing to listen.
- **Purple Forest** is very well run.
- **Seacom FibreCo** has good technical expertise and are always willing to try to find a solution.
- **WECOM** always responds quickly.

Open Access Mapping Project

Goals

- Analyse how much competition there is in the provision of fibre services over open access networks.
 - Useful to have substantiated numbers for competition authorities.
 - Important to be able to determine operator dominance.
- Look for gaps or trends in the areas lacking in coverage.

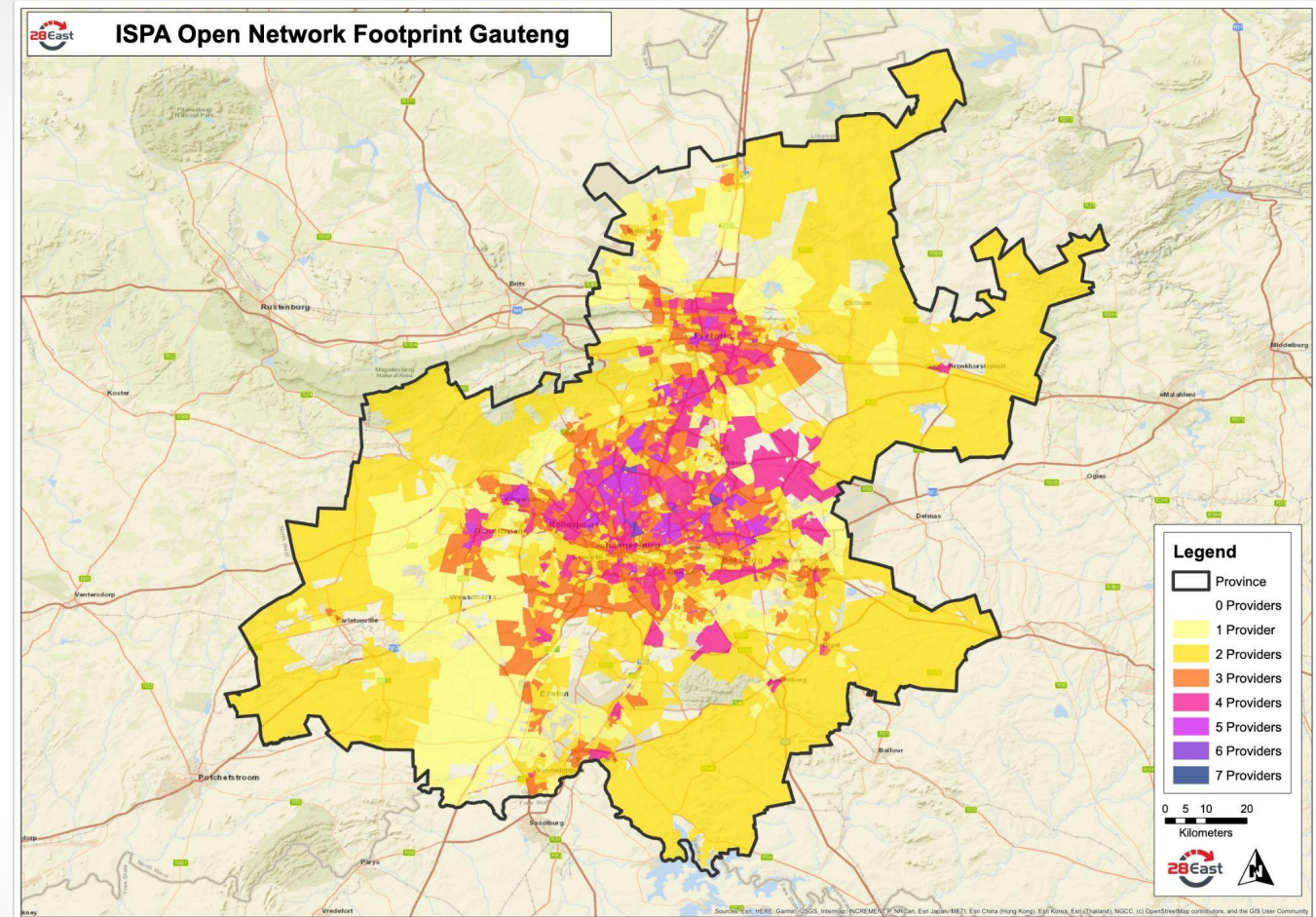
Lessons

- Operators are not consistent in how they provide maps.
- Operators are not all good at maintaining accurate maps.
- A network map is not a map of where services are offered using that network.

Open Access Mapping Project: Phase 1

Phase 1

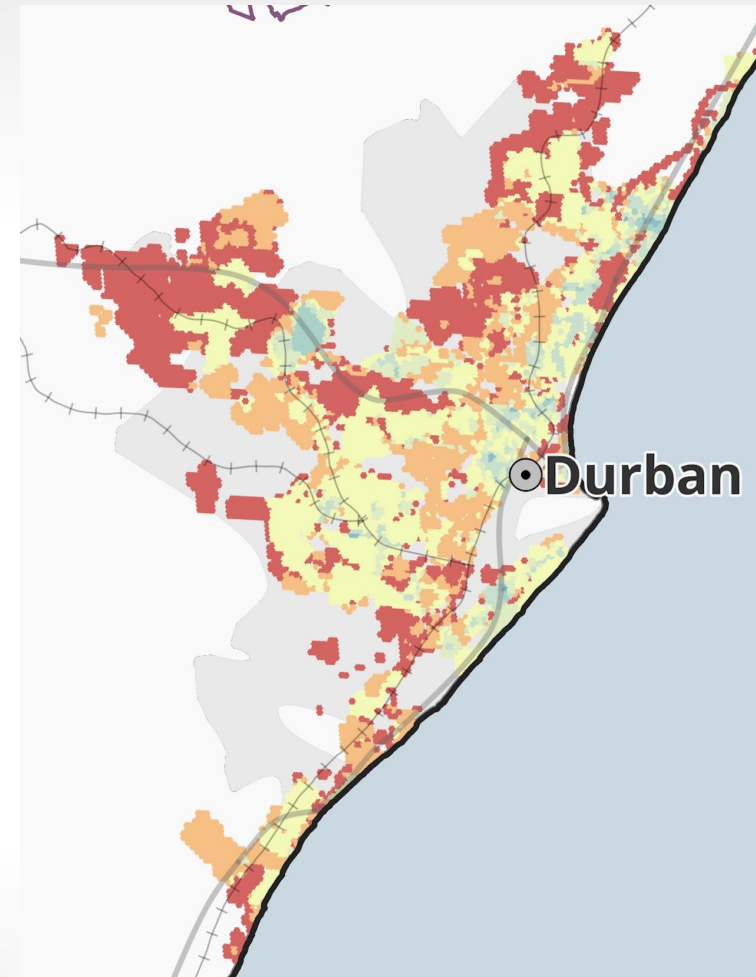
- Published March 2024.
- Used FNO geometric maps, overlapped with Stats SA “subplaces”.
- Tended to overcount networks because of overlapping, inaccurate map polygons.
- Found that, at most, 35% of consumers had a choice of open access FNOs.



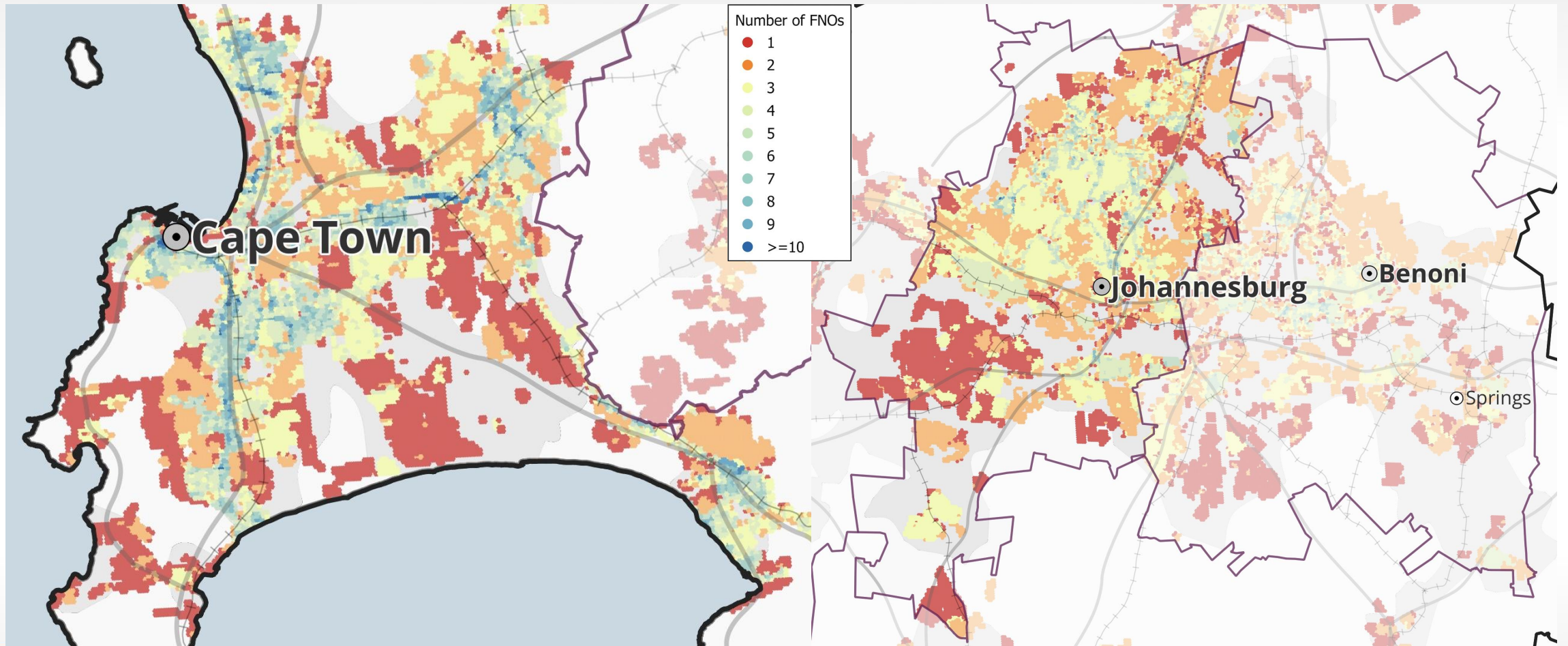
Open Access Mapping Project: Phase 2

Phase 2

- Published April 2024 (soon)
- Uses a 250m x 250m grid.
- Includes 24 open access FNO maps.
- Likely still overcounts competition.
- Found that at least 38% of serviced areas have no fibre competition.



Open Access Mapping Project: Phase 2



Best Practice Recommendations for FNOs/ISPs

<https://ispa.org.za/fnos-isps/best-practice-recommendations/>

- Goal: To ensure fibre users experience a consistent, fair and reasonable approach to the provision of services.
- Deals with the requirements for open access networks, responsibilities for handling customer data and communications, the relationships between FNOs and ISPs, notice periods for price changes, line cancellation and migration processes.
- Current focus: Dealing with “ISP hoppers”
 - FNOs are encouraged to make some information available to ISPs

Questions?

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