

ISPA INTERNET SERVICE PROVIDERS' ASSOCIATION

Internet Service Providers' Association (NPC)
Reg. 2016/167416/08

About the FNO Perception Survey

- A first version of survey was conducted in March 2023 and was open to anyone.
- The survey was rebranded as the FNO Perception Survey and run using the ISPA member portal in August 2023, and repeated again in February 2024.
- ISPs are asked to rate the FNOs that they do business with on eleven different metrics on a scale of 0 to 10.
- The survey is entirely anonymous and **34 FNO networks** are included.
- Some FNOs are only rated by a small number of ISPs, making it easy to bias the scores. ISPA only comments on the ratings that meet a reasonable threshold of responses.
- However, the full results are published on the ISPA website.

Overall number of responses

- August 2023: 48 ISPs provided 276 ratings → 5.75 FNOs each
 - February 2024: 50 ISPs provided 239 rating → 4.78 FNOs each
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- Openserve 29 ratings (↓9)
 - Dark Fibre Africa 28 ratings (↑4)
 - Frogfoot 25 ratings (↓5)
 - Vumatel 21 ratings (↓3)
 - Metrofibre 18 ratings (↓6)
 - Octotel 12 ratings (↓5)
 - Link Africa 9 ratings (↓8)
 - Liquid Int. Tech. 9 ratings (0)
 - Vodacom 9 ratings (↑1)
 - *25 other networks* <9 ratings

How did each of the metrics change?

Technical proficiency (network design, MTU size, Option 82 and IPv6)

- 6.3 (↓0.1)

Reliability (network uptime, packet loss and network stability)

- 6.2 (↓0.2)

Friendliness of staff (friendliness, helpfulness, knowledgeable employees)

- 6.1 (↓0.1)

Open Access principles (ethics, fairness, avoid conflicts of interest)

- 6.0 (↑0.1)

Value for money (line fees and port fees)

- 5.9 (↓0.1)

How did each of the metrics change?

Business processes and operations (ordering, migrating, cancelling and billing)

- 5.7 (↓0.1)

Communication (network notices and scheduled maintenance events)

- 5.5 (-)

Software systems (the FNO's ISP portal, ticketing system and GIS system)

- 5.5 (↓0.3)

Optimism that the FNO will improve in the future

- 5.5 (↓0.3)

Support (responsiveness, resolutions times and SLAs)

- 5.4 (↓0.3)

Likelihood of promoting or recommending this FNO to other ISPs

- 5.3 (↓0.4)

Dark Fibre Africa

- Open access 7.5 (↑0.4)
- Optimism 5.2 (↓0.3)
- Value 5.4 (↓0.4)
- Communications 4.6 (↓0.6)
- Software systems 4.6 (↓0.7)
- Promoting 4.6 (↓0.8)
- Technical 5.7 (↓0.8)
- Business processes 4.4 (↓1.0)
- Staff 5.3 (↓1.0)
- Reliability 4.5 (↓1.8)
- Support 3.5 (↓1.8)

Frogfoot

- Open access 5.0 (↓0.3)
- Reliability 5.6 (↓0.3)
- Software systems 6.2 (↓0.7)
- Staff 6.0 (↓0.8)
- Technical 5.9 (↓0.9)
- Business processes 5.6 (↓1.1)
- Communications 5.6 (↓1.1)
- Promoting 4.4 (↓1.1)
- Optimism 4.5 (↓1.2)
- Support 4.9 (↓1.2)
- Value 4.3 (↓1.3)

Link Africa

- Support 6.8 (↑1.7)
- Technical 7.0 (↑1.6)
- Reliability 7.1 (↑1.3)
- Business processes 7.0 (↑1.0)
- Value 7.8 (↑0.9)
- Communications 5.8 (↑0.7)
- Optimism 6.6 (↑0.8)
- Open access 7.9 (↑0.6)
- Software systems 5.8 (↑0.5)
- Staff 6.9 (↑0.4)
- Promoting 6.1 (↑0.2)

Liquid Intelligent Technologies

- Promoting 6.4 (↑2.2)
- Open access 5.1 (↑2.0)
- Communications 6.1 (↑1.9)
- Optimism 5.9 (↑1.9)
- Reliability 7.3 (↑1.5)
- Staff 6.3 (↑1.5)
- Value 6.4 (↑1.2)
- Support 6.1 (↑1.1)
- Business processes 4.6 (↑0.7)
- Technical 6.7 (↑0.6)
- Software systems 4.3 (↑0.4)

Metrofibre

- Staff 7.9 (↑0.5)
- Open access 5.7 (↑0.3)
- Business processes 7.4 (↑0.2)
- Communications 6.9 (↑0.2)
- Optimism 6.7 (↑0.2)
- Software systems 6.9 (↑0.2)
- Technical 7.5 (↑0.2)
- Promoting 6.4 (↑0.1)
- Support 6.8 (↑0.1)
- Value 6.9 (↓0.1)
- Reliability 6.7 (↓0.5)

Octotel

- Communications 6.9 (↑0.3)
- Staff 6.8 (↑0.3)
- Business processes 6.8 (↑0.2)
- Technical 7.2 (↓0.1)
- Support 7.1 (↓0.2)
- Reliability 7.0 (↓0.3)
- Software systems 6.8 (↓0.5)
- Value 5.9 (↓0.6)
- Promoting 6.0 (↓0.7)
- Open access 5.5 (↓0.8)
- Optimism 5.8 (↓0.9)

Openserve

- Open access 7.0 (↑0.2)
- Value 6.7 (↓0.3)
- Reliability 7.9 (↓0.4)
- Support 5.7 (↓0.6)
- Technical 6.6 (↓0.8)
- Communications 5.4 (↓0.9)
- Staff 5.7 (↓0.9)
- Promoting 6.3 (↓1.0)
- Business processes 5.4 (↓1.4)
- Software systems 5.1 (↓1.4)
- Optimism 5.5 (↓1.4)

Vumatel

- Open access 6.3 (↓0.3)
- Staff 5.5 (↓0.4)
- Business processes 5.4 (↓0.6)
- Software systems 5.4 (↓0.6)
- Support 4.7 (↓0.6)
- Technical 5.4 (↓0.6)
- Value 4.9 (↓0.6)
- Reliability 5.3 (↓0.7)
- Communications 4.5 (↓0.8)
- Optimism 5.2 (↓0.8)
- Promoting 4.8 (↓1.2)

Overall scores: August 2023

- Openserve 7.0
- Metrofibre 6.8
- Octotel 6.8
- Frogfoot 6.3
- Vumatel 6.0
- Link Africa 5.9
- Dark Fibre Africa 5.8
- Liquid 4.7

Overall scores: February 2024

1. Metrofibre	6.9	(↑0.1)	[Up from 2nd place]
2. Link Africa	6.8	(↑1.1)	[Up from 6th place]
3. Octotel	6.5	(↓0.3)	[Down from 2nd place]
4. Openserve	6.1	(↓0.9)	[Down from 1st place]
5. Liquid	5.9	(↑1.2)	[Up from 8th place]
6. Frogfoot	5.3	(↓1.0)	[Down from 4th place]
7. Vumatel	5.2	(↓0.8)	[Down from 5th place]
8. Dark Fibre Africa	5.0	(↓0.8)	[Down from 7th place]

Guess the FNO... (answers will not be provided!)

What one piece of feedback would you like to provide for this operator?

Guess the FNO... (answers will not be provided!)

What one piece of feedback would you like to provide for this operator?

FNO #1

- Going backwards rapidly.
- Has taken a turn for the worse.
- Far better than any other FNO in South Africa.
- Contacting support or getting updates is not easy.
- Must resolve the tedious billing process.
- Can improve on communication.

Guess the FNO... (answers will not be provided!)

What one piece of feedback would you like to provide for this operator?

FNO #2

- Support needs vast improvements.
- Support process is terrible.
- Support has improved.
- Everyone battles to get feedback.
- Reliability has gone down in the last quarter.
- Not all ISPs have access to all of their products.

Guess the FNO... (answers will not be provided!)

What one piece of feedback would you like to provide for this operator?

FNO #3

- Prices not aligned.
- A great relationship.
- I'm giving up on them.
- Terrible support system, escalation is pointless.
- Great products, very reliable, good communication.
- Their lack of communication and urgency to fix anything is shocking.

Guess the FNO... (answers will not be provided!)

What one piece of feedback would you like to provide for this operator?

FNO #4

- Great service!
- They really try.
- The network sometimes is not stable.
- Don't compete with your ISP partners.
- Provide their ISP preferential treatment.
- Changes to products unthought out and haphazard.

Final comments

- This is a *perception* survey, so it measures how the ISPs perceive their FNOs. The metrics can be interpreted differently by respondents.
- Despite some limitations, the surveys are a useful assessment of how ISPs see their FNOs and how views change over time.
- If you are an FNO included in the survey and would like the full results of the survey, please contact secretariat@ispa.org.za with subject “February 2024 FNO perception survey”. If you are an FNO who would like to be included, let us know.
- Thanks to all of the ISPA members who took the time to provide ratings and comments. The survey will be repeated again later in 2024.

Guess the FNO... (answers will not be provided!)

What one piece of feedback would you like to provide for this operator?

FNO #5

- Simple things always become a problem.
- Too many variations on pricing.
- Please fix the short outages.
- Clearly giving their ISP preference.
- The barrier to entry for new providers is significantly high.
- There are some technical and support issues.

Guess the FNO... (answers will not be provided!)

What one piece of feedback would you like to provide for this operator?

FNO #6

- Terms of services for some packages are difficult to implement.
- Not great at building relationships.
- Communication for the most part is good.
- Stop trying to fool us with increasing the speed and then increasing the prices.
- Changes to packages are self-serving and cynical.
- Remove hidden penalties for downgrades.