UGANDA
COMMUNICATIONS
COMMISSION

Annual Communications Sector Report 2023

Towards an Inclusive Digital Economy

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Communication services have become increasingly affordable with significant drop in cost of calls per minute over the past years.

Agago District - Northern Region, Uganda. Photo by Uganda Communications Universal Service and Access Fund (UCUSAF)

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The 50% drop in the cost of Internet per GB is in line with the Commission's vision of achieving an Inclusive Digital Economy.

Kabong District - Karamoja region, Uganda. Photo by UCUSAF

List of Abbreviations and Acronyms

CAGR
Compound Annual Growth Rate

CEO
Chief Executive Officer

CERT/CC
Computer Emergency
Response Team/
Coordination Centre

CCP
Communications
Consumer Parliament

CS
Consumer and Stakeholder

DIA
Dedicated Internet Access

DSL
Digital Subscriber Line

DTP
Digital Transformation
Programme

EACO
East African Communications
Organisation

EMS
Expedited Mail Service

FM
Frequency Modulation

FTA
Free to Air TV

FTTH
Fiber to the Home

GAR
Gross Annual Revenue

GDP
Gross Domestic Product

GoU
Government of Uganda

GSMA
Global System for Mobile
Communications Association

ICT
Information and
Communications Technology

ISPs
Internet Service Providers

ITU
International
Telecommunications Union

M&E
Monitoring and Evaluation

MDAs
Ministries, Departments
and Agencies

MNOs
Mobile Network Operators

MoICT&NG
Ministry of ICT and
National Guidance

MTRs
Mobile Termination Rates

NCIPs
Northern Corridor
Integration Projects

NDP III
Third National
Development Plan

NEMA
National Environmental
Authority

ONA
One Network Area

P2P
Person to Person

PWD
Persons with Disabilities

QoS
Quality of Service

RFC
Regional Film Competitions

SGR
Standard Gauge Railway

UCC
Uganda Communications
Commission

UBOS
Uganda Bureau of Statistics

UCUSAF
Uganda Communications
Universal Service and
Access Fund

UPL
Uganda Post Limited

UPS
Universal Postal Service

UPU
Universal Postal Union

USSD
Unstructured Supplimentary
Service Data

EAC - East African Community. This report includes the partner states of Uganda, Kenya, Tanzania, Rwanda, Burundi and South Sudan. The report does not factor in the new entrants, that is, DRC and Somalia

2023 Snapshot

Telecom

Registered Mobile Subscriptions (Millions)	2023	45M
Active 90 Day Mobile Subscriptions (Millions)	2023	37M
	2019	27M
Active 90 Day Mobile Money Subscriptions (Millions)	2023	27.5M
	2019	16.6M
Active 90 Day Mobile Internet Subscriptions (Millions)	2023	16M
	2019	10M
Smartphones (Millions)	2023	15M
	2019	6.6M
Unique Mobile Subscriptions (Millions)	2023	13.3M

Broadcasting

Licensed FM Radio Stations
264

Pay TV Active Subscriptions
1.6M

Local TV Channels
62

Post and Courier

Domestic Traffic
724,415

EA Inbound & Outbound Traffic
22,668

International Incoming & Outgoing Traffic
731,936

K Thousand   **M** Million   **B** Billion   **KM** Kilometre   **T** Trillion

Active Subscriptions Subscriptions that are active for at least 90 days

Executive Summary

The radical shift towards digitalisation of all socio-economic sectors across the world has made our mandate as the Uganda Communications Commission not only more critical but also urgent. Uganda cannot and will not be left behind in the digital age.

Consequently, the Uganda Communications Commission 2020-2024 Strategic Plan is: 'An Inclusive Digital Economy' in which we set out to 'develop a robust communications sector that drives economic growth'. The plan, an acknowledgment that technology is the springboard for the delivery of quality service, speaks to the national objectives as spelt out in Vision 2040, the Third National Development Plan (NDP III) and the Digital Uganda Vision. Specifically, the plan places emphasis on enhancing the capacity of the Commission to successfully implement its mandate of regulating the communications sector.

The liberalization of the sector to allow in more players has totally revolutionised communication in recent years. Not only has competition among the players encouraged innovation, it has also led to a decline in the cost of communication services. This has translated into increased uptake of these services thereby ensuring that service providers can count on the high numbers to make up for the fall in the cost of their services. With fiber distance now stretching some 30,000 km and over 5000 towers in place, the Commission continues to make it possible for players to reach peripheral and underserved areas.

While we have previously published the communication sector performance reports on a quarterly basis, this Uganda Communications Sector Annual Performance report is the first of its kind. It highlights UCC's role in supporting the achievement of the national and sector ICT priorities which entails promoting utilization of communication services by consumers; establishment of a vibrant and competitive communications sector; and increased stakeholder value from engagements with its stakeholders, among others. Specifically, the report gives an outlook of all the 2023 major highlights across the sector.
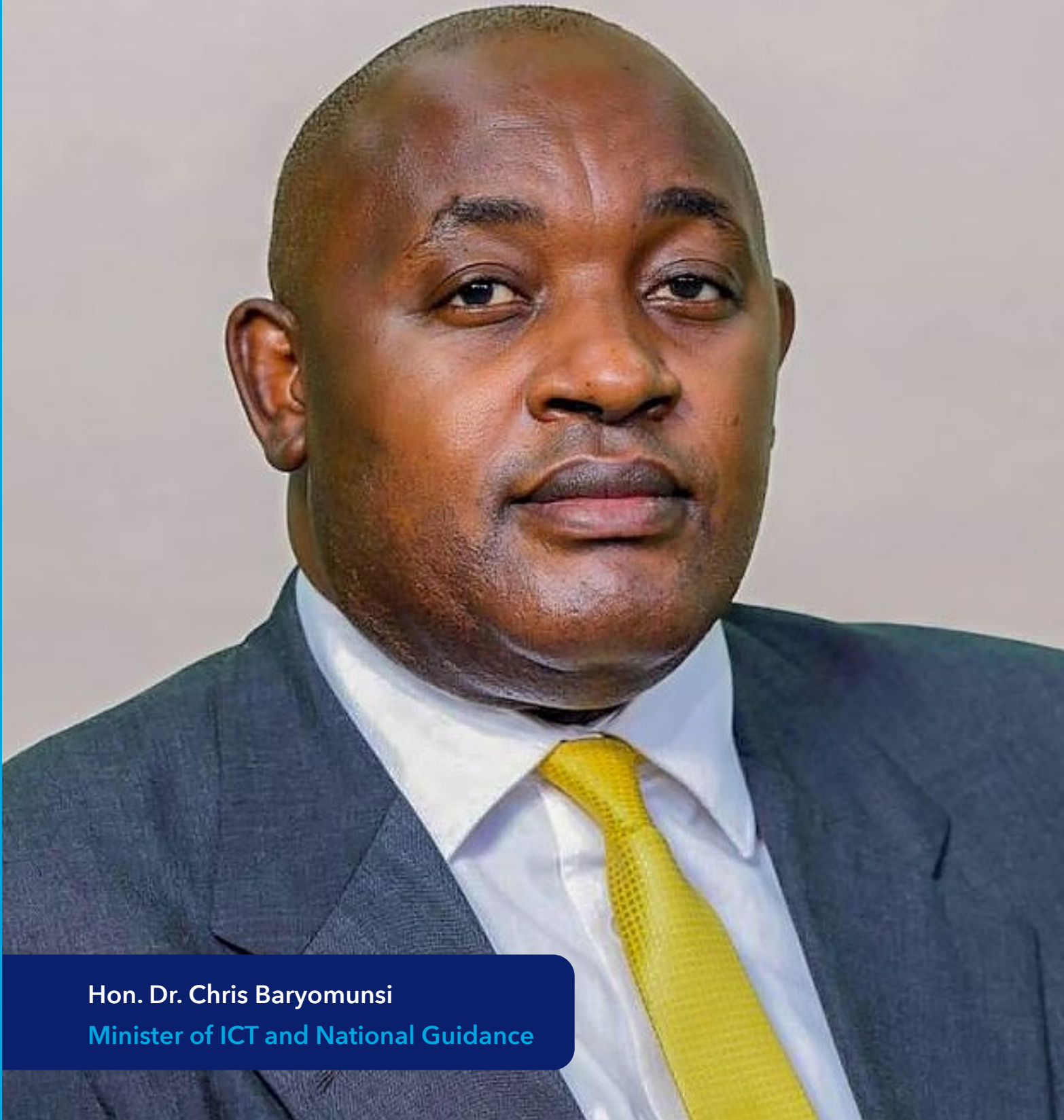
Hon. Dr. Chris Baryomunsi
Minister of ICT and National Guidance

Foreword by the Minister of ICT and National Guidance

The mandate of the Ministry of Information and Communications Technology and National Guidance is to provide strategic and technical leadership, overall coordination, support and advocacy on all matters of policy, laws, regulations and strategy for the ICT sector. Uganda Communications Commission as a regulatory body is critical in implementing government's strategic vision in the ICT sector.

As His Excellency Yoweri Kaguta Museveni has consistently guided, ICTs are one of the four pillars (others are Agriculture, Industry and Services) on which Uganda's prosperity is anchored. I am glad to note that in line with this strategy, as evidenced by its current strategic plan of 'An Inclusive Digital Economy', UCC is at the forefront of actualizing our unwavering dedication to bridging the digital divide and ensuring that every Ugandan, regardless of geographic location or socioeconomic status, can benefit from the opportunities afforded by the digital revolution.
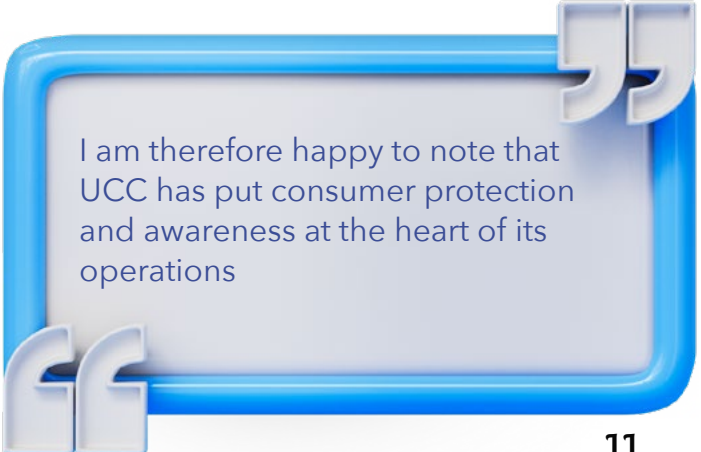
Indeed, the theme of this report, 'Towards an Inclusive Digital Economy' not only resonates with the vision of government of a knowledgeable and productive society driven by ICT and national identity, but also aligns with the ministry's initiatives such as the Digital Transformation Roadmap whose overall objective is to bridge the divide and integrate ICTs in all aspects of life so that they can ultimately drive Uganda's socio-economic transformation.

This report sheds light on the commission's accomplishments in 2023 in terms of expanding access and affordability, empowering customers and promoting innovation and competition. Looking ahead, the path to an inclusive digital economy requires continued investment in infrastructure, policies that promote digital inclusion, and skills development programs that empower our citizens to fully participate in the digital economy. Together, we have the opportunity to unlock new opportunities, drive economic growth, and improve the quality of life for all Ugandans.

Amidst all these developments in technology, consumers must be empowered to exploit the opportunities therein. I am therefore happy to note that UCC has put consumer protection and awareness at the heart of its operations. This is helping to improve digital literacy, productive use of ICT and safety from harm and online fraud.

Once again, I commend the Uganda Communication Commission for its dedication and unwavering commitment to advancing our national agenda in the ICT sector. I encourage our esteemed partners and all stakeholders to leverage the insights and recommendations presented in this report to inform their strategies and actions towards realizing our shared vision of an inclusive and prosperous digital future for Uganda.

> I am therefore happy to note that UCC has put consumer protection and awareness at the heart of its operations

State of the Information, Communications and Technology (ICT) Industry

Hon. Joyce Nabbosa Ssebugwawo, Minister of State for Information, Communications and Technology (MoICT)

The communications industry in Uganda is undergoing massive transformation, driven by growth in technology and the pivotal role of connectivity in our daily lives. The ultimate goal of our ICT Policy is 'to effectively harness the development potential of ICT in order to drive socio-economic development and inclusively improve the livelihood of Ugandans.'

As the Ministry of ICT&NG, we are proudly associated with UCC's innovative initiatives in Telecom, Broadcasting, Post and Courier, Film as well as empowering consumers to partake of the digital economy.

In recent years, we have witnessed steady progress in the deployment of next-generation networks, particularly with the rollout of national backbone infrastructure across the country. This advancement not only enhances government services, but also paves the way for innovations in various sectors, including agriculture, healthcare and education. As we embrace these technologies, our focus remains on ensuring that all communities, regardless of their geographic location, have access to reliable and high-speed internet.

The communications sector stands at a crossroads, with the potential to drive economic growth, enhance social connectivity, and improve quality of life for all citizens. As we navigate this transformative period, we remain resolute on creating a fair, inclusive, and innovative communications environment that empowers consumers and fosters progress. Indeed, this report reflects our commitment to fostering a vibrant communications ecosystem that serves the needs of all citizens.

I invite all stakeholders to join us in this journey as we build a brighter digital future together.

Thank you for your continued support and engagement.
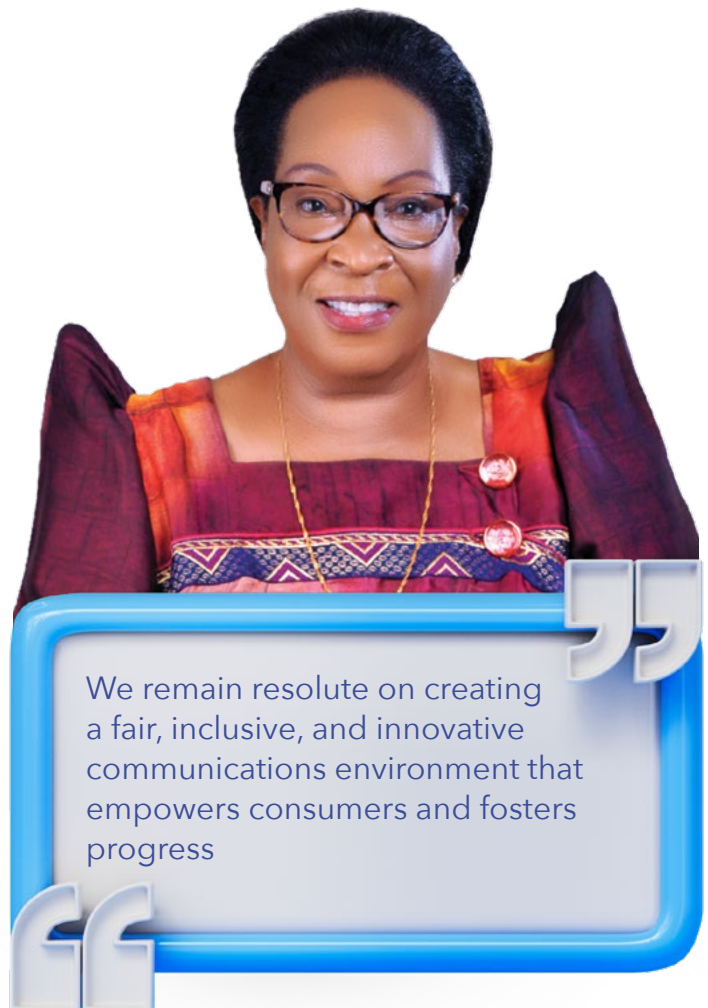
> We remain resolute on creating a fair, inclusive, and innovative communications environment that empowers consumers and fosters progress

Fostering Responsible Communication

Hon. Kabbyanga Godfrey Baluku, Minister of State for National Guidance

This Annual Communications Sector Report encapsulates the significant progress of our nation's communications landscape. In a world where communication serves as the backbone of society, it is imperative that we recognize its role in fostering national development, promoting democracy, and enhancing the quality of life for our citizens.

In 2023, we made significant strides in expanding access to information by use of advanced technologies and resources available in our country. Our government has prioritized investment in infrastructure to bridge the information divide, particularly in rural and underserved areas. With initiatives aimed at enhancing broadband access, we have seen an increase in internet penetration rates, allowing more citizens to engage in the economy. This is not merely about connectivity; it is about empowering individuals and communities to participate fully in society.

The communications sector therefore is not just about technology; it is also about the content we consume and produce. This year, we have emphasized the importance of quality journalism and the role of media in a democratic society. A free and independent press is essential for holding power accountable and ensuring that diverse voices are heard. The rapid pace of technological change poses significant threats and in particular the potential for misinformation to spread rapidly through social media channels. In response, we have intensified our efforts to promote digital security awareness and combat misinformation. This includes collaboration with various stakeholders, including civil society organizations and the private sector, to create a safer and more informed digital environment. We have initiated programs aimed at supporting local media outlets and encouraging responsible journalism, which is vital for public trust and informed citizenry.

Looking ahead, we envision a future where the communications sector continues to thrive, driven by innovation and inclusivity. Our strategic priorities for the coming year include supporting emerging technologies and fostering public-private partnerships that drive sustainable development. We remain committed to ensuring that all citizens can access the digital tools necessary for personal and professional growth.

I encourage all stakeholders to continue their engagement and collaboration. Together, we can harness the power of communication to build a better future for our nation.

> We have intensified our efforts to promote digital security awareness and combat misinformation

Hon. George William Nyombi Thembo
Executive Director, UCC

Executive Director's Message

Uganda Communications Commission operates as an integrated regulatory body overseeing various sectors, including Telecommunications, Data Communications, Broadcasting, Postal Communication, Radio Communication, and Infrastructure services throughout Uganda. We are also tasked with the responsibility of licensing operations of cinematography theatres and video or film libraries in Uganda. Cognizant of our mandate in today's dynamic world where the digital revolution is transforming societies worldwide, we in 2020 adopted 'An Inclusive Digital Economy' as our vision for the Strategic Plan 2020-2024. This strategic plan speaks to our mission to 'develop a robust communications sector that drives economic growth' that places Uganda as an active participant in this exciting digital era.

I am, therefore, delighted to present the Uganda Communications Commission's Annual Sector Performance Report for 2023. This report offers a comprehensive overview of the sector's key achievements in 2023 and serves as a testament to the UCC's unwavering commitment to fostering a robust and inclusive digital economy in Uganda. Throughout the year, we focused on initiatives that aligned with our strategic plan, prioritizing nurtuting a communications sector that fuels economic growth.

As highlighted throughout this report, 2023 witnessed significant strides in the Ugandan communications sector in all sectors of Telecom, Broadcasting, Post and Courier services as well as Creative and Film in terms of enhancing consumer empowerment, promoting a thriving communications sector and amplifying stakeholder engagement.

Looking back, all these achievements would not have been possible without the unwavering support of the government of Uganda, our line ministers, our partners and stakeholders as well as all the consumers— the reason we exist. Looking ahead, we remain resolute in our commitment to driving Uganda's digital transformation journey. We are confident that by continuing to work together with all of you, we can leverage the immense potential of the communications sector to unlock an inclusive digital economy in Uganda that leaves no one behind.

Enjoy reading the report.

**George William Nyombi Thembo,
Executive Director**

> Our strategic plan speaks to our mission to develop a robust communications sector that drives economic growth that places Uganda as an active participant in this exciting digital era

Advancing Uganda's Digital Future: A Pathway to Transformation

Dr. Aminah Zawedde - Permanent Secretary, Ministry of ICT and National Guidance

As the world becomes increasingly interconnected through technology, Uganda is key in its development. With a youthful population, rising internet penetration, and a growing entrepreneurial spirit, the nation has the potential to harness digital tools for transformative change.

With its five-year National Digital Transformation Roadmap launched by Vice President Jessica Alupo through the Ministry of ICT & National Guidance in August 2023, Uganda made a major step toward a digital future. This roadmap functions as a thorough framework to utilize digital technology to enhance service delivery and encourage socioeconomic change on a national level. Infrastructure and connectivity, digital services, digital skills development, cybersecurity and data protection, innovation, and entrepreneurship comprise its five main structural pillars. To ensure inclusivity for all residents in this digital revolution,

each pillar is essential to building a solid foundation for Uganda's digital journey.

This article explores the pathways to advancing Uganda's digital future, focusing on the five pillars;

Infrastructure and Connectivity: The Backbone of Digital Transformation

A robust digital infrastructure is fundamental to Uganda's transformation. Expanding broadband networks, particularly in underserved regions, is critical. Investments in fiber optic cables, satellite technology, and wireless networks can enhance connectivity across the country. Public-private partnerships can drive these initiatives, leveraging both governmental support and private sector expertise to create a comprehensive digital infrastructure that supports economic growth.
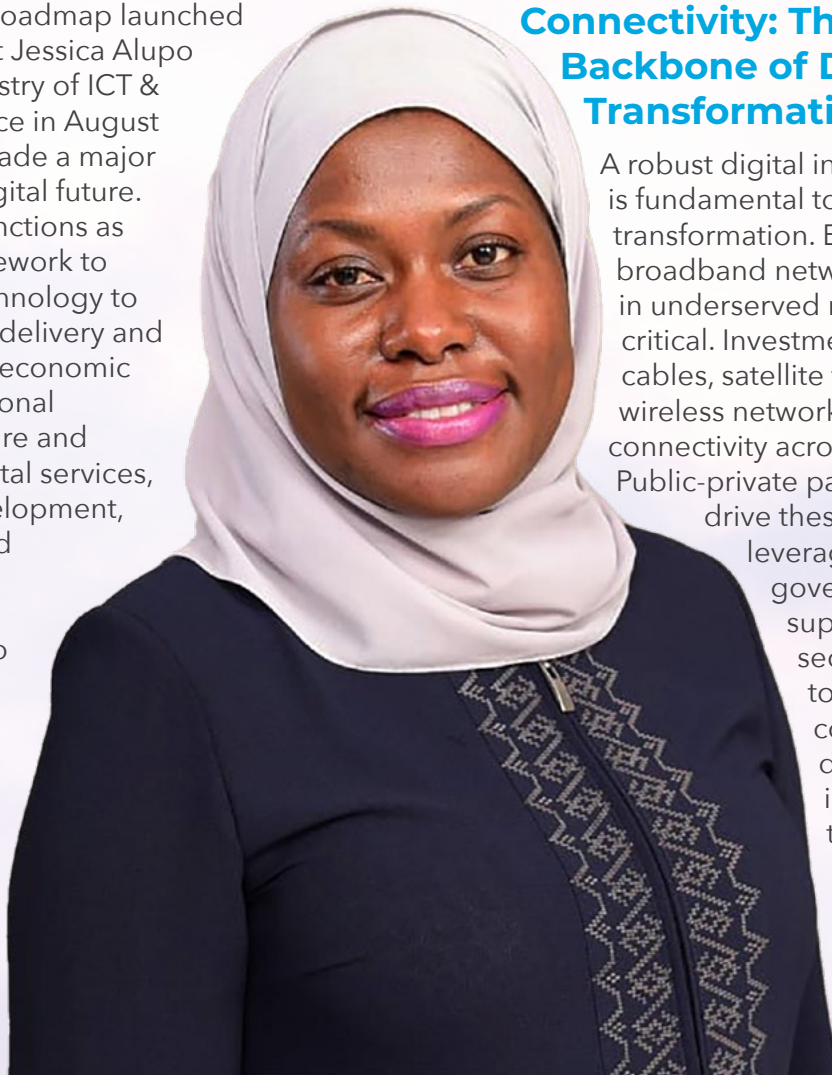
Uganda is actively working to improve its digital infrastructure, focusing on expanding internet access and enhancing mobile connectivity, especially in rural areas

Uganda is actively working to improve its digital infrastructure, focusing on expanding internet access and enhancing mobile connectivity, especially in rural areas. The government is investing in fiber optic networks and collaborating with telecom providers to provide affordable internet services.

The National Backbone Infrastructure (NBI) spans 4,300 km, connecting 53 of the 146 districts across the country, representing 36% coverage. It includes 32 telecom-grade transmission stations, optimized with green energy solutions. Key border posts, including Busia, Malaba, and Elegu, are connected to the NBI. Additionally, the excess capacity on the NBI is utilized by 21 Mobile Network Operators/Internet Service Providers, accounting for 52.5% of the licensed providers. The National Data Centre and Disaster Recovery site hosts 95 MDAs with 264 critical applications (August 2024).

In addition, 300 wireless hotspots are linked to the MyUG initiatives to increase the coverage of broadband ICT infrastructure. We currently have 77% of the country covered by 3G, 31% by 4G, and quickly moving toward 5G coverage. As stated by the Ministry of Finance, Planning and Economic Development (MoFPED) financial report 2023-24, the internet penetration in the country has increased to 64 percent from 25 percent in 2017.

The Ugandan government is dedicated to investing in the development of smart cities, the expansion of high-speed internet, and the improvement of digital infrastructure, including data centers and cloud services, through strategic public-private partnerships like the World Bank under the UDAP project. By doing this, we are enabling businesses and citizens to access internet services, engage in the global digital economy, and enhance their quality of life.

Although Uganda is making progress in enhancing its connection and infrastructure, it still lags behind nations like Nigeria and South Africa in terms of internet penetration and total mobile coverage. Other countries, like Kenya, offer effective examples of expanding broadband and mobile money. For Uganda, closing these gaps will be crucial.

Digital Services: Bringing Government Closer to the People

Our roadmap's core goal is to create digital services that are both accessible and efficient. The intention is to make government services more accessible, efficient and focused on the needs of the citizenry. Digital services will cut down on bureaucratic red tape, simplify administrative procedures, and improve citizen involvement with the government. Online government service delivery currently accounts for 40% of all services, up from 20% in 2017.

In addition, the Government of Uganda through the Ministry of ICT&NG is providing business opportunities by supporting the development and maintenance of local ICT products that provide Government services like the **Integrated Health Management Information System(iHMIS)**, the **Electronic Government Procurement System (EGP)**, **Parish Development Model Information System** (PDMIS), the **Online Business Registration System (OBRS)**, the **Education Management Information System (EMIS)** among others.

We guarantee that residents have access to vital services at any time and from any location by digitizing vital services including banking, healthcare, education, and agriculture. In our ideal Uganda, a student in Arua might attend online classes without having to leave their home, and a farmer in Karamoja could use a smartphone to get market and weather updates. Digital platforms also make safe, cashless transactions easier, which encourages financial inclusion and increases national economic activity. In addition, the Ugandan government is putting measures in place to draw in foreign investment and has been actively supporting the BPO sector. The business community will benefit from increased market prospects and revenue thanks to the BPO Policy that is presently being developed.

Digital Skilling: Empowering Citizens for the Digital Economy

Equipping the population with digital skills is paramount for a successful transition into a digital economy. Integrating technology into the education system can prepare students for future job markets. Moreover, targeted training programs for adults—especially for women and marginalized communities—can enhance digital literacy and create a more inclusive workforce. Partnerships between educational institutions and technology companies can provide hands-on training and internships, ensuring that learners gain practical experience.

The Digital Transformation Roadmap prioritizes the upskilling and reskilling of Uganda's workforce to meet the demands of the digital era. This involves integrating digital literacy into the national curriculum from the primary to tertiary level, as well as offering targeted digital training programs for all age groups, including vulnerable communities. We have a digital skilling tertiary academy called the Uganda Institute of Information and Communications Technology (UICT) offering ICT skilling services. UICT doubles as the home of the National ICT Innovation Hub that spurs innovation, ICT business masterclasses & networking within the young population.

The Ministry of Education and Sports also launched its Digital Agenda Strategy and Digital Skills Framework which is aligned with the Digital Transformation Roadmap under the Digital Skilling pillar of the roadmap. The First Lady presided over the launch and handed over both to the Ag. PS Ministry of Education & Sports - Dr. Jane Egau and I, to co-implement under the two Ministries. The Digital Agenda strategy aims at closing the digital divide by advocating for students to embrace digital technologies and access digital content in schools.

The government continues to work closely with educational institutions, private sector partners, and civil society to create opportunities for digital learning, foster a culture of continuous education, and ensure that every Ugandan, regardless of background, has the skills needed to thrive in a digital economy. Special emphasis is being placed on empowering women and youth, who represent a significant portion of our population, to become active participants and leaders in the digital transformation journey.

Cybersecurity and Data Privacy: Safeguarding Our Digital Future

To safeguard people, companies, and governmental organizations from cyber dangers, the roadmap places a strong emphasis on the creation and implementation of strong cybersecurity measures and data privacy standards. Preserving our digital assets and protecting the data of our residents is critical as Uganda proceeds with its digital transformation.

Through the creation of national cybersecurity regulations, the development of cybersecurity experts' skills, and the encouragement of a culture of cyber hygiene among all internet users, we are dedicated to creating a secure digital environment. Uganda also strives to bring its data protection legislation into compliance with global norms, guaranteeing that all users may trust our digital systems and that they are safe.

While Uganda has established a solid foundation in cybersecurity and data privacy, countries like Kenya and Rwanda have made strides with more comprehensive legal frameworks and proactive policies. Uganda's initiatives, especially the Data Protection and Privacy Act (2019), position it well, but ongoing efforts in implementation, capacity building, and public awareness are crucial for it to stay competitive regionally.

Innovation and Entrepreneurship: Fostering a Thriving Digital Ecosystem

Uganda's vibrant startup ecosystem is a beacon of potential. The government and private sector should collaborate to nurture this environment by providing resources for tech hubs and incubators. Access to funding and mentorship can empower local entrepreneurs to develop innovative solutions that address Uganda's unique challenges, from agriculture to health care. Promoting innovation not only drives economic development but also positions Uganda as a competitive player in the regional tech landscape.

Innovation and entrepreneurship are critical drivers of economic growth and job creation in the digital era. The Digital Transformation Roadmap sets out a clear path to nurture a vibrant digital innovation ecosystem that encourages creativity, experimentation, and collaboration. This involves supporting start-ups, small and medium-sized enterprises (SMEs), and innovators through access to funding, mentorship, and incubation services.

The National Innovation Hub in Nakawa is currently hosting 57 innovators, working with 12 Entrepreneur Support Organizations (ESO), and offering 79 mentorship trainings. This infrastructure has been extended beyond Kampala and we have so far supported three (3) universities to set up similar infrastructure (innovation hubs) and offer similar facilities to innovators in Kigezi (through Kabale University); Teso (through Soroti University) and West Nile (through Muni University).

By creating an enabling environment that fosters innovation, Uganda positions herself to become a hub for technological advancement and digital entrepreneurship in the region. We will support the development of homegrown solutions that address local challenges and contribute to the global digital marketplace.

In Summary

Advancing Uganda's digital future represents a significant opportunity for the nation to leverage technology for sustainable development. By focusing on infrastructure, innovation, education, inclusivity, and supportive policies, Uganda can create a dynamic digital landscape that drives economic growth and improves the quality of life for its citizens.

The journey toward a digital future is not without its challenges, but with a clear vision and collaborative efforts, Uganda can emerge as a leader in the digital age, paving the way for a brighter, more connected future.

Together, we will build a digital Uganda that leaves no one behind.

Consumer Empowerment is a Critical Focus

Julianne R. Mweheire, Director Economic Regulation, Content and Consumer Affairs

This past year was pivotal for the communications industry, with rapid technological advancements and shifting consumer expectations shaping the landscape. Our commitment to fostering a fair, competitive, and consumer-friendly environment remains steadfast, and this report reflects our ongoing efforts in these areas.

The communications sector is at the forefront of innovation, with new technologies such as 5G, and fiber services transforming how we connect and communicate. These advancements present significant opportunities for growth. Our regulatory frameworks have evolved to keep pace with these changes, ensuring that they promote competition while safeguarding consumer interests.

One of our primary objectives is to ensure that consumers have access to high-quality services at fair prices.

In the past year, we have taken significant steps to enhance transparency in pricing and service quality. We have implemented measures requiring service providers to clearly disclose all terms and conditions in their services, enabling consumers to make informed choices. Our consumer advocacy initiatives have gathered valuable feedback, allowing us to address common concerns related to service reliability and customer support.

In addition to improving transparency, we have focused on enhancing competition within the sector. A competitive marketplace drives innovation, lowers prices, and improves service quality. We have actively monitored market dynamics and intervened where necessary to prevent anti-competitive practices. Our efforts to streamline the licensing process for new entrants have facilitated

We have implemented measures requiring service providers to clearly disclose all terms and conditions in their services, enabling consumers to make informed choices

greater competition, benefiting consumers by providing more options and better services.

The digital divide however remains a critical issue in our industry. Many communities, particularly in rural and underserved areas, still lack access to reliable high-speed internet as well as suitable and affordable devices to be part of the digital ecosystem. To address this challenge, through the Uganda Communications Universal Service Access Fund (UCUSAF) and continued collaboration with stakeholders, we are promoting initiatives aimed at expanding broadband access. Targeted investments have been made to improve infrastructure, ensuring that all consumers can participate in the digital economy.

Consumer education is another cornerstone of our strategy. In an era where technology is constantly evolving, we recognize the importance of empowering consumers with the knowledge they need to navigate the complexities of the communications market. Our outreach programs have focused on educating consumers about their rights, the services available to them, and how to effectively resolve disputes with service providers. We believe that informed consumers are better equipped to advocate for their needs and hold providers accountable.

As we look ahead, our focus will be on adapting to emerging trends while remaining committed to our core principles of transparency, competition, and consumer protection. We will continue to engage with stakeholders, including industry representatives, consumer advocates, and policymakers, to ensure that our regulatory frameworks are responsive to the changing landscape.

I wish you good reading.

We have actively monitored market dynamics and intervened where necessary to prevent anti-competitive practices

Telecommunication

Network infrastructure is a key driver of national development. UCC licences telecommunication service providers and ensures nationwide connectivity through its regulatory and oversight role in the expansion of telecom infrastructure in terms of both towers and fiber network. To bridge the gap in the unserved and underserved areas, UCC ensures universal access through the UCUSAF initiative.

The vision of a fully connected Uganda remains a key priority with ongoing efforts to enhance tower density and fiber roll outs to expand network reach to every corner of Uganda.

Telecommunication at a Glance

Infrastructure

Towers
5,064

Geographic Network Coverage

2G **76%**
3G **72%**
4G **55%**

Fiber
33,653KM

Service Access

Mobile Subscriptions

Registered | Active
45M | **37M**

Fixed Line Subscriptions
131.1K

Mobile Phone Access

Basic Phones
2.1M

Feature Phones
25M

Smart-phones
15M

Internet

Fixed Internet Subscriptions
48,133

Mobile Internet Subscriptions
16M

Social Media Subscriptions

WhatsApp
7.4M

TikTok
5.5M

YouTube
4.6M

Snapchat
1.4M

Instagram
1.0M

X
600K

Netflix
94K

Mobile Money

Registered Mobile Money Accounts
41.2M

Active 90 Day Accounts
27.5M

Active 30 Day Accounts
21.3M

Mobile Money Agents
667K

Tower coverage

Towers facilitate provision of network coverage. They operate by transmitting radio waves that carry signals such as voice calls, text messages, and internet data. When you make a call or send a message, your device communicates with the nearest tower that in turn relays the signal to another tower and so on until it reaches the destination. As such, the growth of tower coverage supports the increasing demand for reliable connectivity, facilitating not only communication but also critical digital services including, banking, health, education, defence and e-governance which are vital for socio-economic development.

Figure 1   **Total Tower Counts**
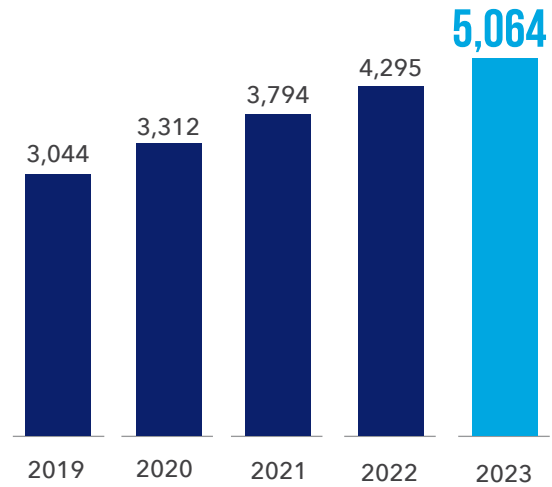
Figure 2   **Countrywide Tower Distribution 2023**
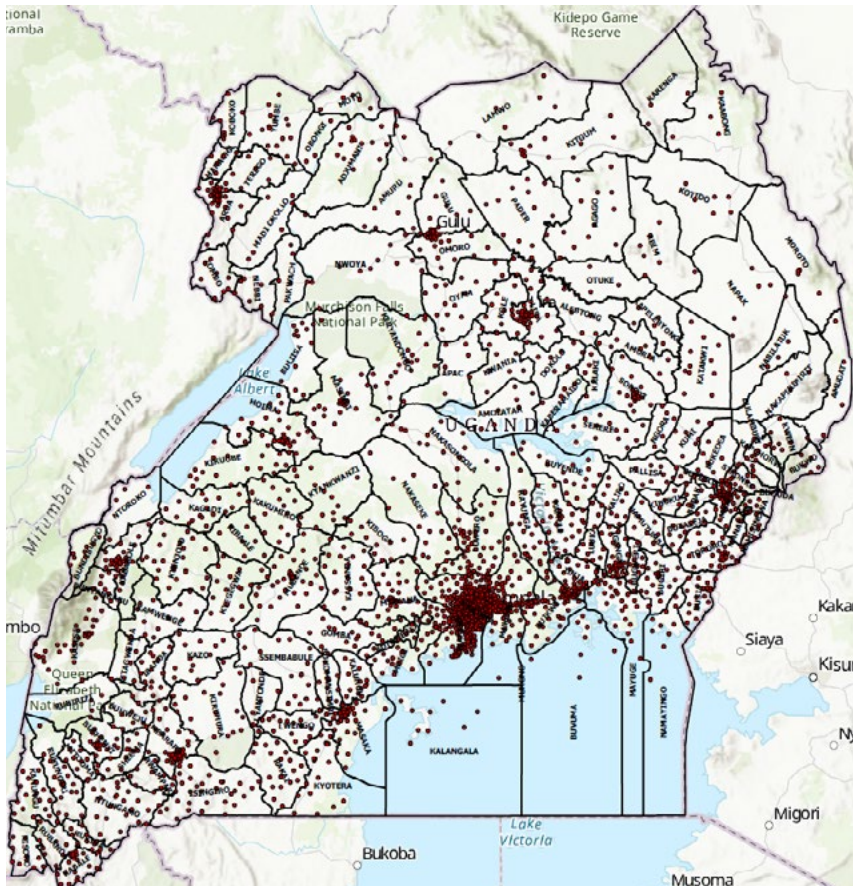
More towers translate into wider and improved coverage. In Uganda, the total telecom tower count has increased by 66% from 3044 in 2019 to 5064 towers in 2023 implying improved mobile telecom connectivity for the consumer.

Regional Tower Distribution

There has been notable growth in the number of towers across all regions. The Western Region accounts for 23%, the Northern Region for 16%, the Eastern Region for 16% while the Central Region accounts for 46% of the total towers in the country. With the current licensing requirement of 90% coverage, there will be increased distribution of towers to the regions outside the Central Region.

Through the UCUSAF initiative, there are ongoing measures to roll out more towers especially in the unserved and underserved areas to ensure that even the remotest communities have access to essential telecom services and are part of the digital economy.

Figure 3   **Regional Tower Distribution 2023**

15%
16%
23%
46%
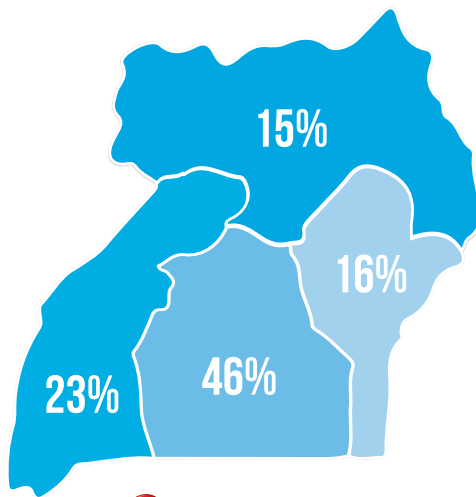
The tower distribution for Central Region is significantly higher than other regions because of the concentration of towers in the Kampala metropolitan area as shown in the map in Figure 2. Other factors such as terrain also account for the disparities in Figure 3.

Fiber Infrastructure

The fiber optic network is fundamental to the country's ICT development due to its capacity to transmit large volumes of data at high speeds over long distances with minimal signal loss. Uganda has realised significant expansion of its fiber network growing by 71% from 19,709 km in 2019 to 33,653 km by December 2023.

Figure 4 **Fiber Distance 2019**

Key

— Fibre Footprint ◯ Lakes
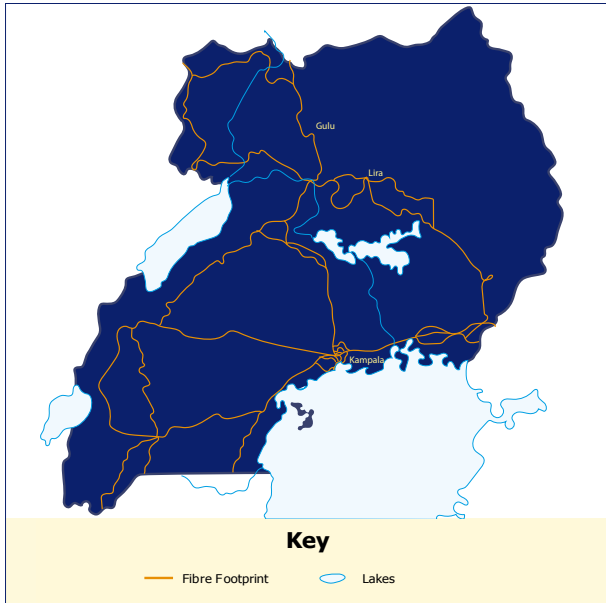
Figure 5 **Fiber Network Layout 2023**

Key

— Current Fibre Footprint — Planned Fibre Footprint
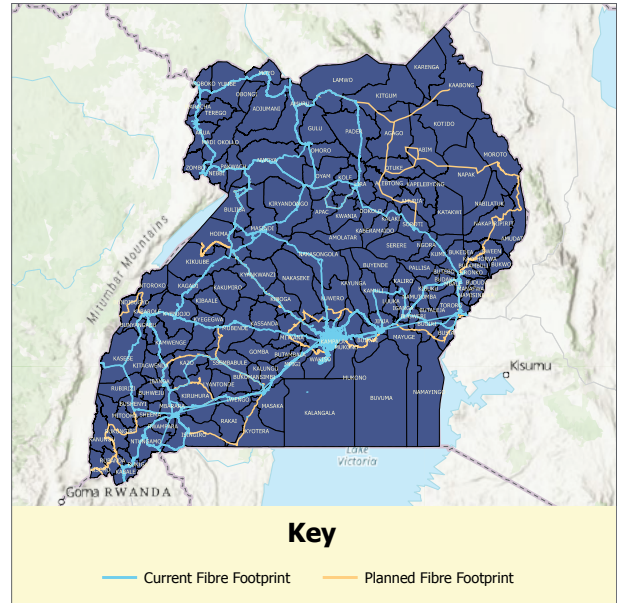
Figure 6 **Fiber Distance in kilometres**

Year	Distance
2019	19,709
2020	21,369
2021	28,353
2022	29,596
2023	33,653

Government shall in the next five years focus on extending fiber infrastructure to the North and NorthEast regions
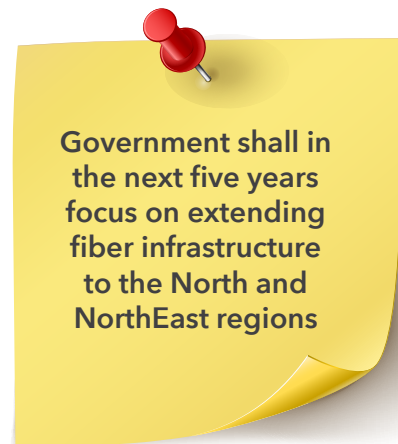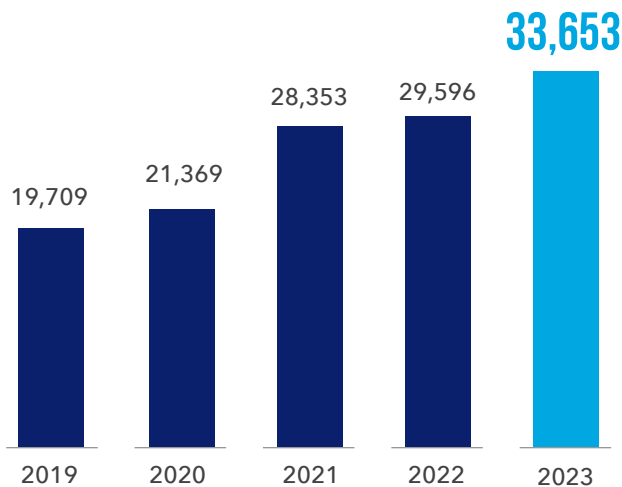
Mobile Network Infrastructure Coverage

Uganda has over the years registered notable progress in mobile network coverage. Besides the expansion of tower coverage, mobile communication infrastructure expanded through the awarding of spectrum to telecom operators, namely, MTN, Airtel and Lyca. This push towards attaining the right and optimal value of Uganda's spectrum resources has drawn the country closer to the national broadband targets and ultimately achieved increased access to the internet.

Consequently, Uganda has seen significant progress in mobile network coverage from 2019 to 2023. According to the GSMA Mobile Connectivity Index which measures key indicators including infrastructure, network performance and spectrum availability, in 2022 Uganda scored 59.5 in infrastructure indicating a robust network coverage and moderate network performance. Specifically, the population network coverage metric is at 78.6, showing extensive population reach of mobile networks across the country.

During this period, 3G network increased from 48% in 2019 to 72% in 2023. The more advanced 4G network increased from 34% to 55%. On the other hand 2G network is at 76% as of 2023.

Figure 7 **Mobile Network Coverage – Global Performance**

Uganda's Infrastructure Score - GSMA Mobile Connectivity Ranking Index

59%

Infrastructure
60% 2022   66% 2023

Network Coverage
79% 2022   81% 2023

Network Performance
42% 2022   49% 2023

Spectrum
57% 2022   69% 2023
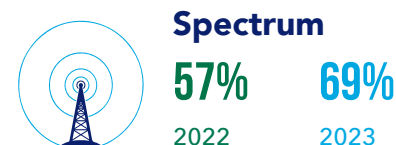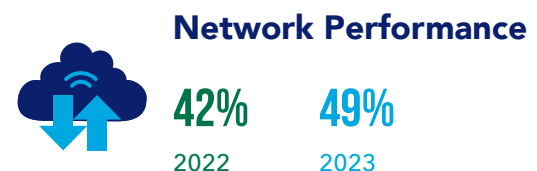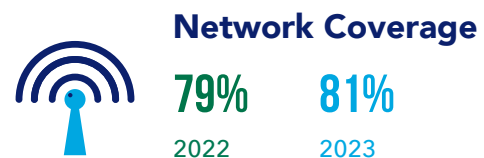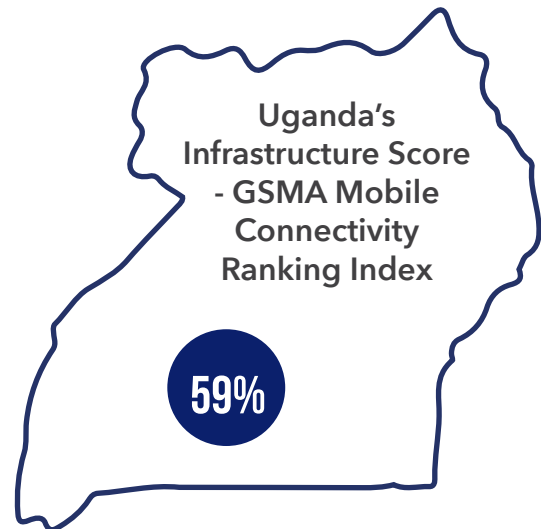
Source: GSMA

Engendering an Inclusive Digital Economy: The Smart Devices Project

This initiative empowers consumers with the tools and digital literacy to participate in the growing digital economy. With telecommunications infrastructure now reaching all corners of the country, such initiatives are helping to bridge the digital gap and foster inclusion.

UCC Team delivering solar powered tablets in Yumbe. District

Mobile Subscriptions

Over the years, mobile subscriptions in Uganda have shown a steady upward trend. There was growth of total subscriptions from 33.1M in 2022 to 37M in 2023, marking a penetration growth of 12%.

Figure 8 Active Mobile Subscriptions (Millions)

- 2019: 26.59
- 2020: 27.67
- 2021: 29.44
- 2022: 33.07
- 2023: 37.0
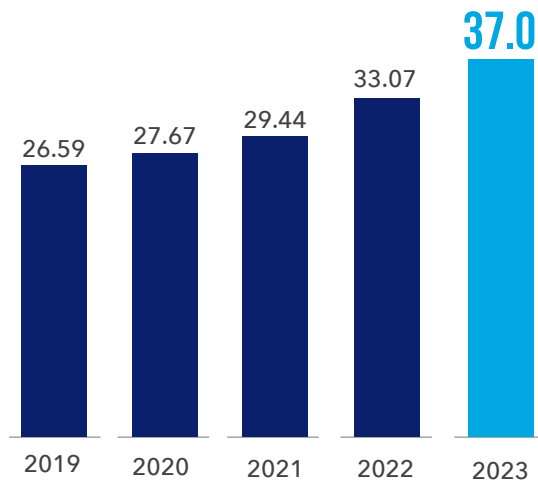
Figure 9 Comparative Cellular Penetration

Comparative Mobile cellular Penetration by Region, 2023

- Uganda **81%**
- East Africa **100%**
- Africa **92%**
- Global **111%**
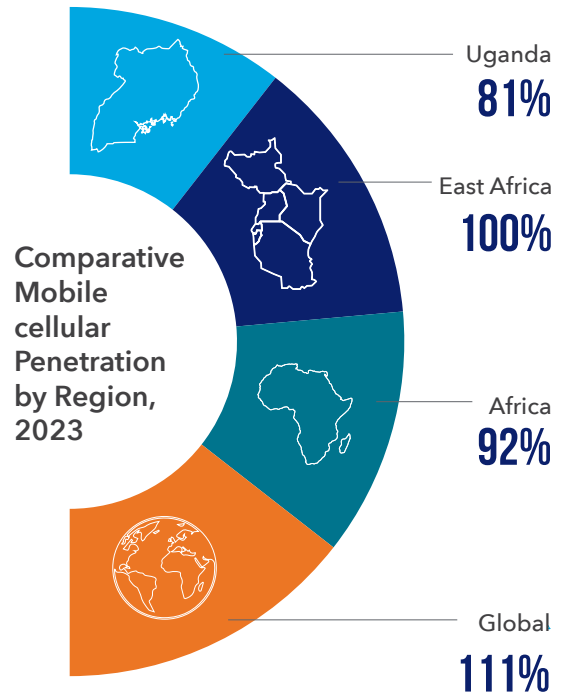
Regional Subscriber Distribution

Uganda has made significant strides in expanding mobile cellular subscriptions across the country. The Central Region has the highest number of subscribers, accounting for 42% (15.4 million subscribers). The Western Region follows with 26% (9.6 million subscribers), while the Eastern and Northern Regions have a smaller share of subscribers, with 19% (7.1 million) and 13% (4.9 million) respectively.

MNOs find the Central region, specifically the Kampala metropolitan area, to offer greater business prospects than other regions due to the high population density and economic activity which explains the region's higher concentration of subscribers.

Figure 10 Regional Subscriber Distribution

- 4.9M
- 7.1M
- 9.6M
- 15.4M
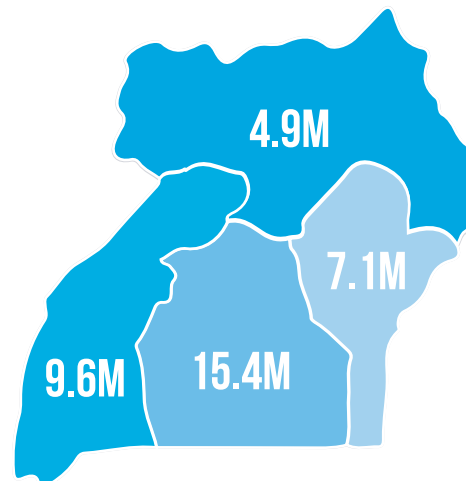
Unique SIM Subscriptions

The addressable population in Uganda, that is, individuals aged 18 and above, totals 22 million. This results in an overall penetration rate of 60%. While a significant portion of the male population at 63% has access to mobile services, there is still a gap in female access that stands at 56%.

Globally, addressing the gender divide in mobile cellular subscriptions is a priority concern. While the ITU perfect threshold is 0.98 – 1.02, the **Global Gender Parity Score** for mobile ownership currently stands at 0.92, Africa's score is 0.84 and Uganda's score is 0.986 which is well within the recommended threshold. This score shows that Uganda's concerted efforts to address gender parity issues such as leveraging International Girls in ICT Day and associated activities are beginning to bear fruit.

Figure 11 Mobile Access by Gender

Population
45M
22.3M above 18 years
10.6M above 18 years
11.7M above 18 years

Unique SIM subscriptions
13.3M
6.7M 6.6M

Mobile Access by Gender
63% 56%

Addressable Market Mobile Cellular Penetration
60%
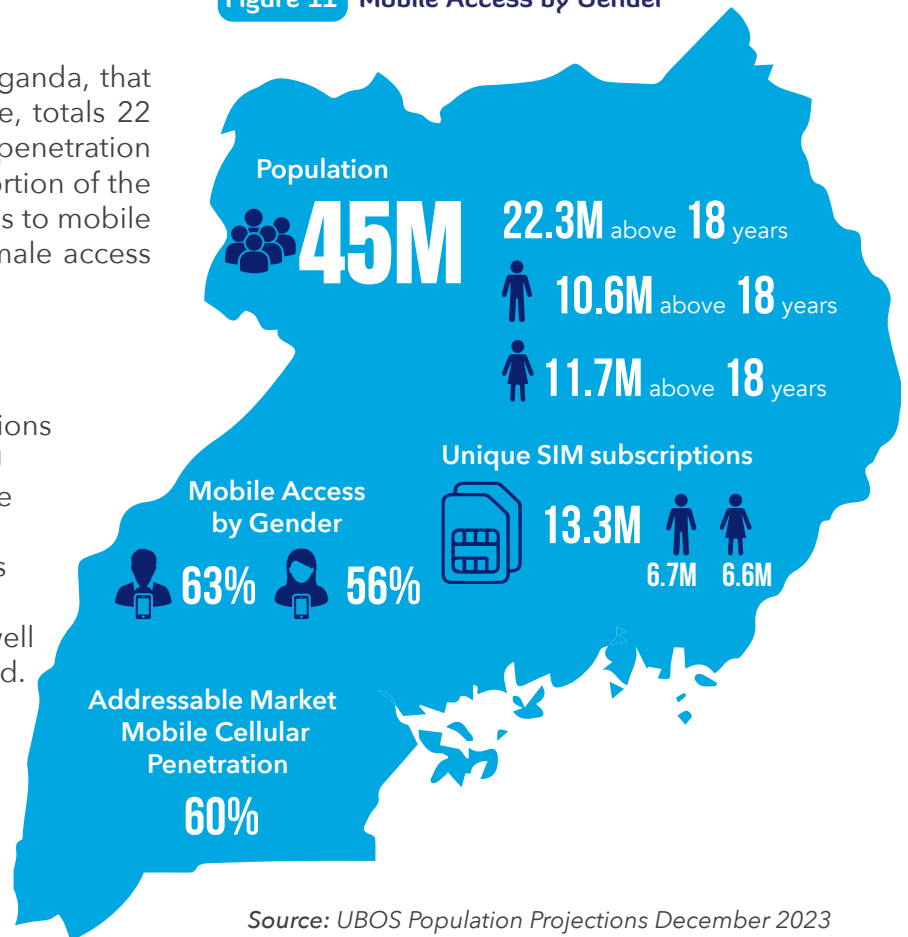
Source: UBOS Population Projections December 2023

Figure 12 Uganda's Gender Parity Score

0.84

0.986

Global Score **0.92**   Acceptable Performance Threshold **0.98-1.02**
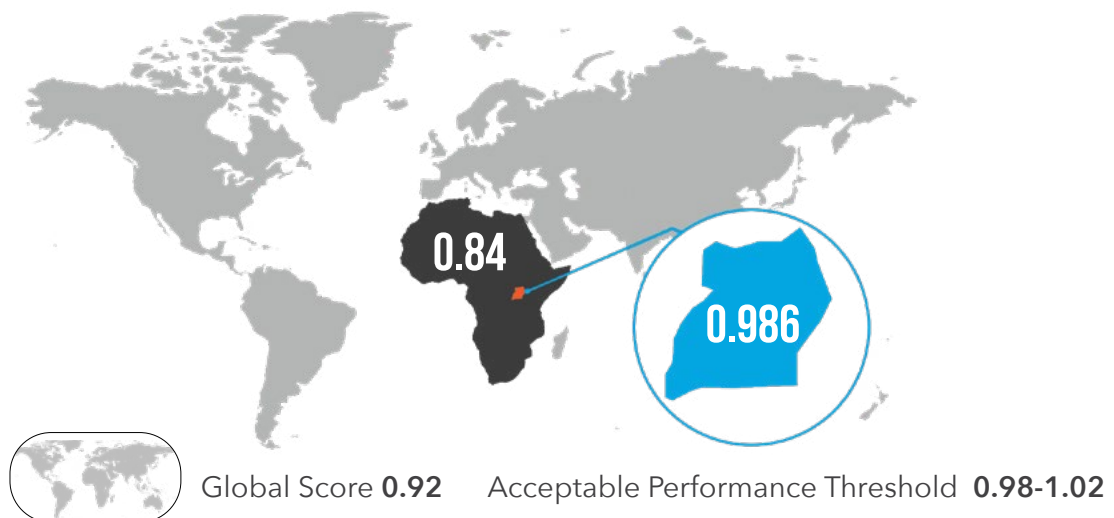
Source: International Telecommunications Union (ITU)

Leveraging the International Girls in ICT Day to inspire girls and women in Uganda to take up technology

Every year, UCC celebrates the International Girls in ICT Day which aims to inspire a global movement to increase the representation of girls and women in technology. In 2023, UCC celebrated the day under the theme 'Digital skills for Life'. The UCC ED reiterated the message of promoting girls participation in ICT so as to bridge the digital divide.

Mobile Internet Subscriptions

The Uganda ICT landscape has witnessed remarkable growth in mobile internet subscriptions, with the number of subscribers increasing from 14 million in 2020 to 16 million in 2023.

Figure 12 Mobile Internet Subscriptions (Millions)

2020	2021	2022	2023
14.1	15.9	13.0	16.0
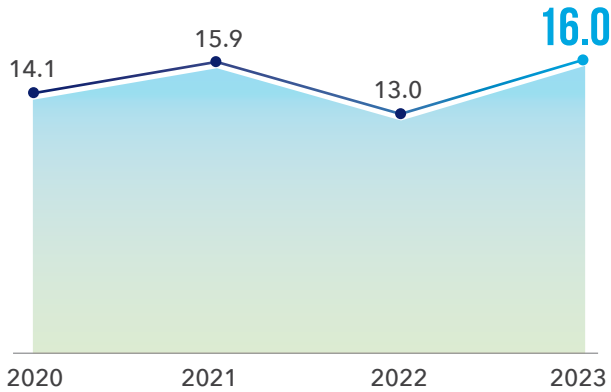
This growth pattern is attributed to a number of factors including:

- Reduced cost of internet
- Innovation in consumer product profiling/customisation catering to the diverse needs of Uganda's young and tech-savvy population
- Niche products that are tailored to user preferences and lifestyles such as 'Paka Paka' and 'Freaky Friday'

EAC Regional Comparison of Mobile Internet Subscriptions

While mobile internet subscriptions have shown an upward trend in Uganda, variations in infrastructure development, economic resources and population density contribute to differences in internet penetration across the countries.

Figure 13 EAC Regional Comparison of Mobile Internet Subscriptions in Millions

- South Sudan 1.6M
- Uganda 16M
- Kenya 52M
- Rwanda 9.3M
- Tanzania 36M
- Burundi 3.0M
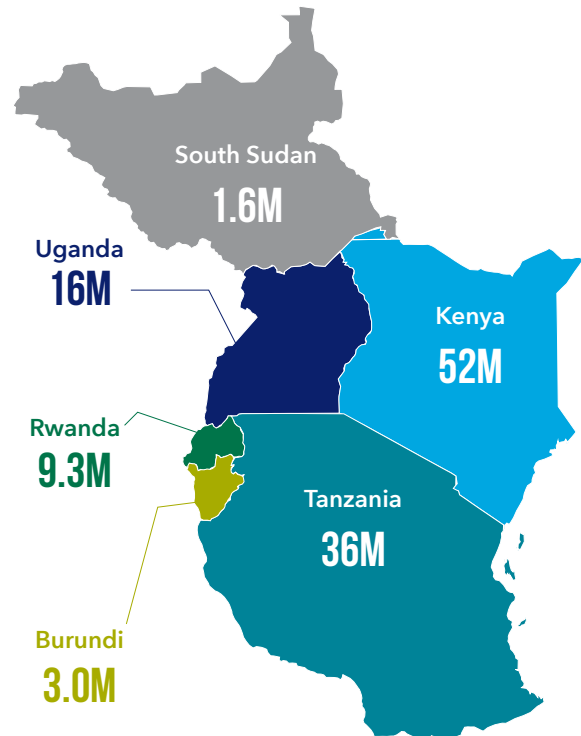
Fixed Line Subscriptions

Fixed line services commonly known as 'landline' registered 61% growth from 81,367 in 2019 to 131,143 in 2023. The fixed line subscriptions market has seen comparatively slower progress compared to the dynamic expansion in mobile subscriptions.

The modest growth can be attributed to continued demand from legacy customers and government MDAs.

Figure 14 **Fixed Line Subscriptions**

| | 131,143 |
| 86,763 | 101,763 | 116,763 |

| 2020 | 2021 | 2022 | 2023 |
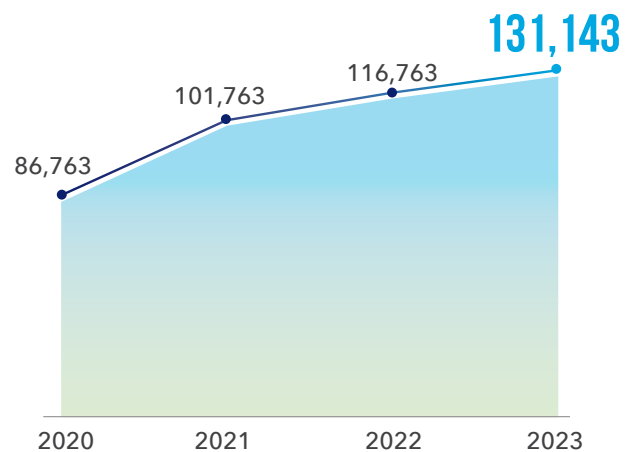
Fixed Internet Subscriptions

Fixed internet subscriptions refer to internet connections that are delivered to a fixed location such as a home or office, through a physical connection like wires, cables or fixed satellite receivers. Common types of fixed internet in Uganda are fiber optic and to a lesser extent digital subscriber line (DSL).

Fixed internet subscriptions have grown from 34,763 in 2020 to 48,133 subscriptions in 2023 reflecting the increasing importance of reliable broadband access in Uganda's digital economy.

Prior to the COVID-19 pandemic, fixed internet subscriptions were mainly a preserve of official and commercial spaces. The lockdown and the associated work and study from home as well as increased access to video on demand services like Netflix, Zoom, etc. made the need for stable and high-speed internet connectivity paramount, driving the uptake of fixed internet subscriptions.

Also, the entry of new ISPs into the market has intensified competition and spurred innovation in service delivery and pricing strategies for both residential and business thereby driving further growth in fixed internet subscriptions.

Figure 15 **Fixed Internet Subscriptions**

34,763 (2020)
38,513 (2021)
40,255 (2022)
48,133 (2023)
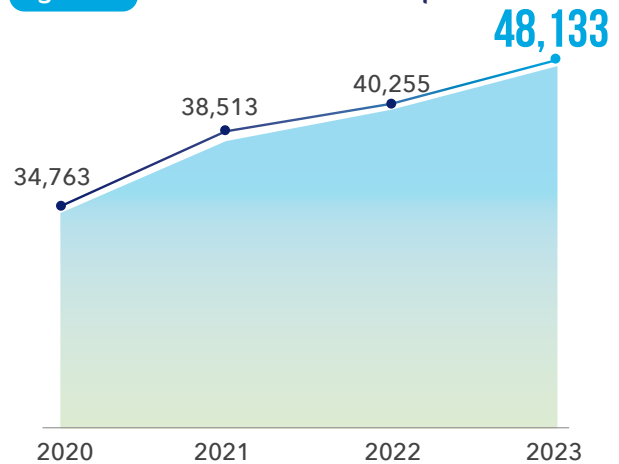
Mobile Devices

There are three categories of devices common in Uganda—basic phones, feature phones and smartphones. Individual device owernership is influenced by different factors including affordability, socio-economic status, digital literacy, purpose of the device and availability of network connection.

Basic Phones

Basic phones have experienced a notable decline in Uganda's mobile device market over the past few years. They are characterised by their limited functionalities and are primarily for making calls and sending text messages. The number of basic phones in use has dropped from 5 million in 2020 to 2.1 million devices in 2023.

Figure 16 **Basic Phones in Millions**

- 2020
- 2021
- 2022
- 2023
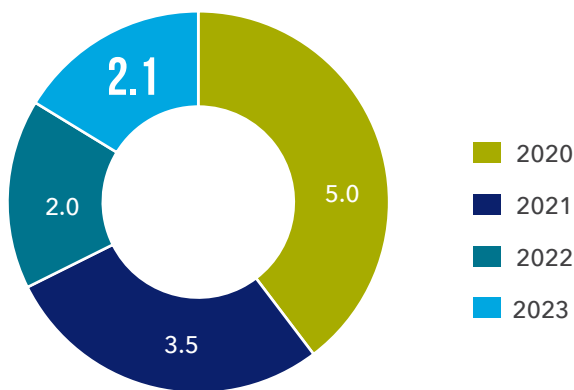
This decline reflects a significant shift not only in consumer preferences towards more advanced mobile devices but also the rise in digital literacy.

The proliferation of mobile devices, particularly smartphones and feature phones, poses a growing e-waste challenge in Uganda. As consumers upgrade to newer models and discard older devices, the disposal and management of electronic waste become increasingly critical.
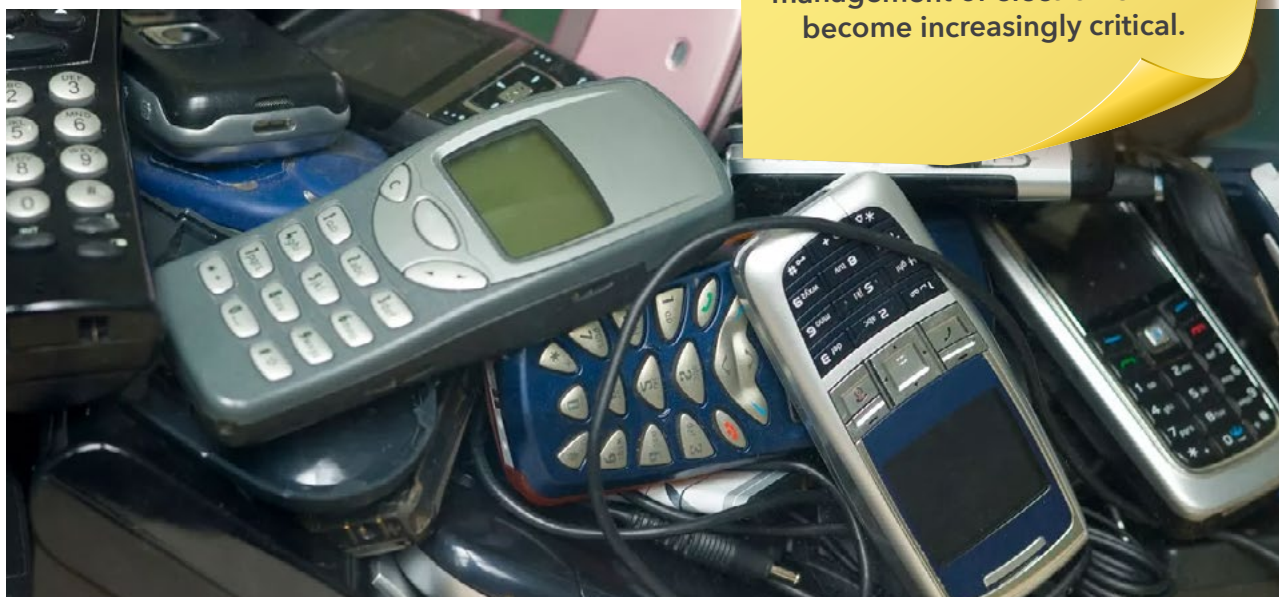
Feature Phones

Feature phones offer more functionality than basic phones but are less advanced than smartphones. They are a sort of middle ground between the 'katorchi', old-school 'brick phones' and the modern touchscreen smartphones. Feature phones continue to dominate the market in Uganda maintaining steady growth relative to smartphones. The number of feature phones in use has increased significantly from 17.8 million in 2020 to 25 million in 2023.

The continued dominance of feature phones owes to the fact that they are generally much cheaper, more durable and have longer battery life than smartphones. This not only makes them accessible to a broader segment of the population, especially in rural and low-income areas, but also suitable for users in regions with limited access to electricity and reliable power sources.

Figure 17 **Feature Phones in Millions**

2020	2021	2022	2023
17.8	20.5	23.8	25.0
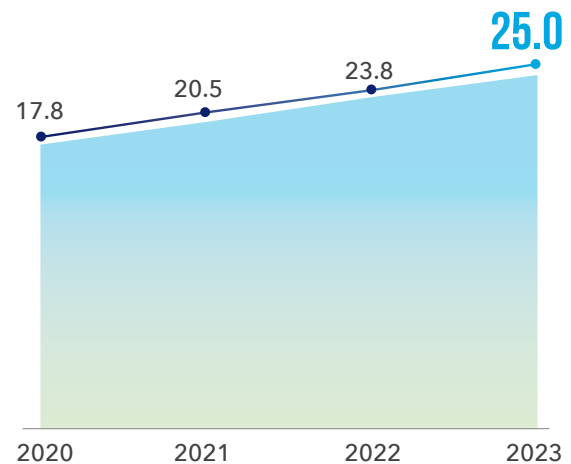
Smartphones

With an average annual growth rate of 25% since 2020, smartphones have become increasingly accessible to Ugandans. Smartphones in use in Uganda have risen from 7.6 million in 2020 to 15 million in 2023.

Figure 18 **Smartphones in Millions**

15.0

12.3

10.1

7.6

| 2020 | 2021 | 2022 | 2023 |
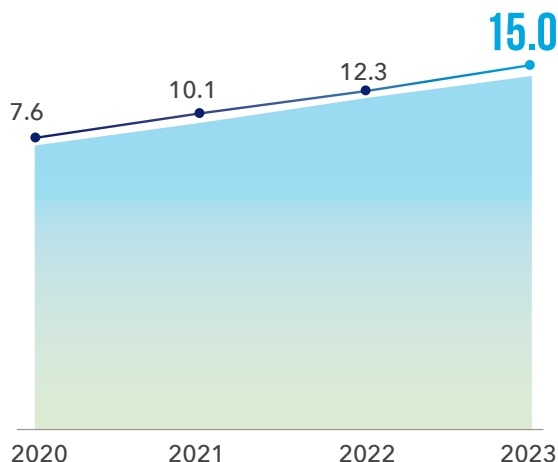
The increase is smartphone penetration is driven by the availability of low-cost devices and innovative affordability schemes such as hire purchase plans offered by MNOs. The popularity of social media apps like TikTok, Snapchat, and WhatsApp has also fuelled smartphone adoption, particularly among Uganda's tech-savvy and youthful population.

Smartphone penetration for the entire population, however, stands at 33%. In comparison, the global smartphone penetration rate is 54%. Although Uganda lags behind the global average, the adoption of smartphones among adults is quite robust.

Figure 19 **Smartphone Penetration in Uganda Vs the Global Average**

Uganda Population Above 18
22.3M

Uganda Smartphone Ownership
15M

23:45

Global Penetration
54%

Uganda Addressable Smartphone Market Penetration - Above 18 years
67%

With only
15 million adults owning smartphones, Uganda is working hard to bridge the digital divide and fully unlock the opportunities of a digital economy.

37

Mobile Money Agents

Mobile money operations are largely serviced through an agent network. Agents deliver last mile mobile money services to consumers on behalf of the MNOs. The expansion of agent networks is paramount not only for ensuring service accessibility particularly in the rural and underserved areas but also for bridging the financial services access gap.

The number of mobile money agents grew from 212,517 in 2019 to 667,172 by the end of 2023.

Figure 20 Mobile Money Agents (Thousands)

667

476

430

264

213

2019   2020   2021   2022   2023

Mobile Money's Growth

Registered Mobile Money Accounts
41.2M
+12%

Mobile Money Agents
667K
+55%

Active 90 Day Accounts
27.5M   +9%

Active 30 Day Accounts
21.3M   +9%
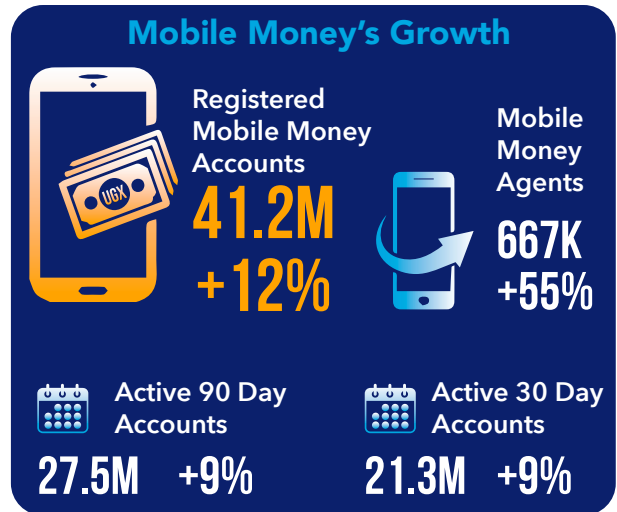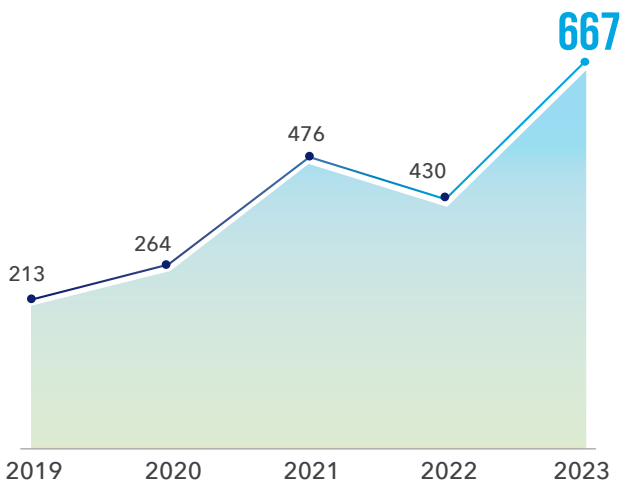
The rapid expansion of the agent network can be attributed to convenience for the consumers in terms of overcoming geographical barriers for the financially excluded rural and remote areas. It is also a good entrepreneurial venture as an income generating occupation as well as a source of employment.

To maintain the safety and efficiency of payment systems especially after non-MNO institutions like Safe Boda Cashless, Pesapal and Xente began offering payment systems , Bank of Uganda under the National Payments Act took on this mandate that was initially under UCC.

Fintechs and Digital Payments in Uganda

How School Pay is Catalysing the Digital Revolution in School Fees Payments in Uganda

Mr Joseph Ndiiho Kiiza, Co-founder, Service Cops

Mr Joseph Ndiiho Kiiza is a co-founder of Service Cops, the fintech behind several impactful innovations, notably, School Pay which is currently being run under Fincom Technologies. School Pay is a universal digital fees payment and school management platform that enables parents to conveniently pay school fees using their mobile phone. Many users have found the groundbreaking innovation very user-friendly and convenient. It has reduced school payment queues, eliminated the cost of moving to banks as well as reduced the operational costs of banks. The application is a product that demonstrates digital transformation's potential in improving everyday consumer activities.

We spoke to Joseph on a few issues around fintechs and digital payments in Uganda, trends, opportunities, challenges and the future.

What challenges do fintechs in Uganda grapple with? How can regulators like UCC and Bank of Uganda support fintechs to better serve Ugandans?

As fintechs, we deal with a population with changing priorities, needs and lifestyles. We must walk that journey with them, think ahead and predict what they are going to need in terms of innovation. For example, with School Pay, once you've offered the school fees payment solution, the schools demand something along financing with banks and so on and it becomes an entire ecosystem for which you must find innovative solutions. In that regard, we are always striving to meet these emerging needs as and when they come up.

Amidst all this, one wonders; does the regulator appreciate the fintech's challenges—both structural and infrastructural? Does the regulator understand what the fintech is doing or only sees when the payment is made at the tail end.

Moreover, the innovation space is too fast-paced, and the regulators are always playing catch-up. In most cases, regulators are perceived to be inhibitors of growth who come up with a set of rules sometimes without looking through the processes and appreciating the nuances therein. You always get the sense that the regulators are prone to generalising with a one-size-fits all approach.

Therefore, for regulators to support fintechs, we need to find a balancing approach where they begin to think like us. Regulators should take a more proactive approach, understanding the thought processes behind fintech innovations and working collaboratively with them to develop policies that promote growth and innovation without stifling the sector.
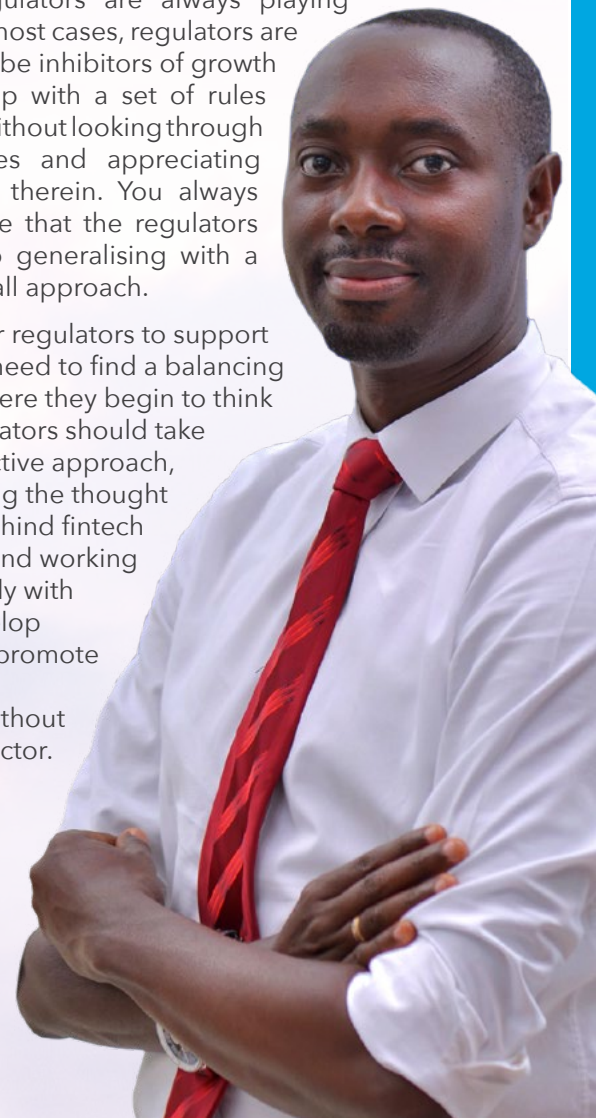
Regulators should take a more proactive approach, understanding the thought processes behind fintech innovations and working collaboratively with them to develop policies that promote growth and innovation without stifling the sector

They need to look at fintechs differently, understand their journeys, then come up with not a one-size-fits-all, but with more targeted regulatory approaches to the different players. It is also important for regulators to be more flexible and adaptable to the rapidly changing landscape of fintech.

Beyond regulation, what can the Ugandan government do to support fintechs and drive an inclusive digital economy?

Beyond regulators like UCC, Bank of Uganda, etc., are there other government bodies that are relevant to the growth of this sector? What are they doing to support us? Are they even thinking about ICT or do they think support is a preserve for traditional industries such as production-led manufacturing?

We are operational across the region in Kenya, Tanzania, Ethiopia and Zambia where we go and hustle on our own and bring in foreign exchange to Uganda. When we are out there, we compete with several technology companies in whom you can see the hand of government support from how their embassies make prior arrangements for them straight from the airport pickups to setting up meetings with key officials in the country while we are on our own with our rucksacks. Often, we triumph only because we have a superior solution. Now, imagine the possibilities of how big and scalable our sector could be if the government picked up on just the export part and we had like 10,000 of us? What do you think we would be doing in the markets of Africa and beyond? By taking these steps, the government can create a

conducive environment for fintech innovation and ensure that the benefits of a digital economy reach all segments of society.

As a pioneer in the fintech space, what advice would you give to a fintech starting up in Uganda today?

So, for anyone trying to enter the Ugandan space, I would point them to the maturity level of our market. While it is growing, it is not saturated, although there is significant competition in established areas. There are two approaches: You are either coming in to play into the space that is already being played, such as mobile payments, or doing something totally novel or complementary to the existing services or products.

For a fintech entering the Ugandan market, I recommend focusing on a niche market and long-term sustainability. Instead of directly competing with existing players, consider building an ecosystem around a specific problem or solution. This approach allows you to attract partners and customers without directly challenging established market leaders. When developing your market entry strategy, avoid short-term tactics like aggressive pricing. Instead, focus on building a sustainable business model that can weather market fluctuations.

Remember, success in the Ugandan fintech market requires a combination of innovation, strategic partnerships, and a long-term perspective.

How does Uganda's digital payments ecosystem compare to other African countries, and what opportunities and threats do you see as Uganda pushes towards an inclusive digital economy?

Let me attempt to segment Africa into different spaces as far as digitalisation is concerned. In Eastern Africa and parts of Central Africa, the digital payments are largely mobile-money driven, North Africa and South Africa operate more with the card-based arrangements, and while mobile money is beginning to take root in West Africa, big markets like Nigeria are still largely running on cards and mobile wallets.

Uganda's digital payments ecosystem, predominantly driven by mobile money, stands out in comparison to many African countries that rely heavily on card-based systems. Unlike the card system that has run for so long with established systems, the relative newness of the mobile money approach presents us opportunities to develop new systems and define our own rules. Secondly, unlike card payments that require a point-of-sale technology, mobile money uses a USSD system on a handheld device, whether it be a smartphone or basic phone, offering significant opportunities for financial inclusion especially in rural areas and among the urban poor.

The danger, however, is that the transactions around mobile money have gone ahead of formalization of the economy. I could easily buy a sack of Irish potatoes from someone in Kisoro by sending them mobile money, but that person has no TIN number so URA does not know them and can't tax their income. So, the government instead places a higher tax on the transaction hence driving up the cost of transacting via mobile money. Whereas that is a quick way of government making money, sometimes it inhibits development in the sense that once you make it so hard for me to transact over mobile money, I will find a way of moving this money in a totally different angle and you may lose the benefits that you are trying to gain. So, sometimes it is for the governments to

take a longer-term view and say, how long can we wait before we slap all these taxes for everybody to get used to that. And once you have everybody cornered on board, then even if you introduced a very small tax, you will pick up more than when you impose high tax that becomes prohibitive.

Besides, the rapid growth of digital payments also presents challenges such as increased fraud and cybersecurity risks. To fully realize the potential of a digital economy, Uganda must prioritize cybersecurity, promote financial literacy, foster interoperability, and balance innovation with regulation.

Given the global digital revolution and its transformative potential, how can the Ugandan government effectively leverage the ICT sector to drive socio-economic development?

I believe the government can significantly support and harness Uganda's ICT sector by focusing on enabling conditions for growth. Personally, I see this sector having even bigger potential than the manufacturing or even agriculture sectors.

I have seen firsthand the potential of the ICT sector at Service Cops. Our company is a large tax payer contributing significantly to the domestic revenue envelope. We also employ over 200 young people, primarily aged about 25, who are contributing to the economy by exporting services and generating foreign exchange. Imagine the impact if we could scale this model to create thousands of similar companies.

So just imagine we had the opportunity for the regulators, and government bodies to create 5,000 other Service Cops in this country with ready skilled youth that can work all over the world like India is doing rather than send them off to do odd jobs in the Middle East.

The government can play a catalytic role by providing the necessary support, such as access to funding, mentorship, and market opportunities.

Social Media Applications

Driven by Uganda's youthful population and the proliferation of both smartphones and feature phones, there has been notable adoption and usage of numerous social media apps. In 2020, there were 13.7 million social media subscribers. This grew to 20.7 million by 2023.

Besides, the reduction in costs and accessibility of mobile data plans and innovative packages has further enabled consumers to actively participate in social media, often maintaining multiple accounts across different platforms.

Figure 21 Social Media Subscriptions in Millions (December 2023)

WhatsApp	TikTok	YouTube	Snapchat	Instagram	Twitter	Netflix
7.4	5.5	4.7	1.4	1.0	0.6	0.09
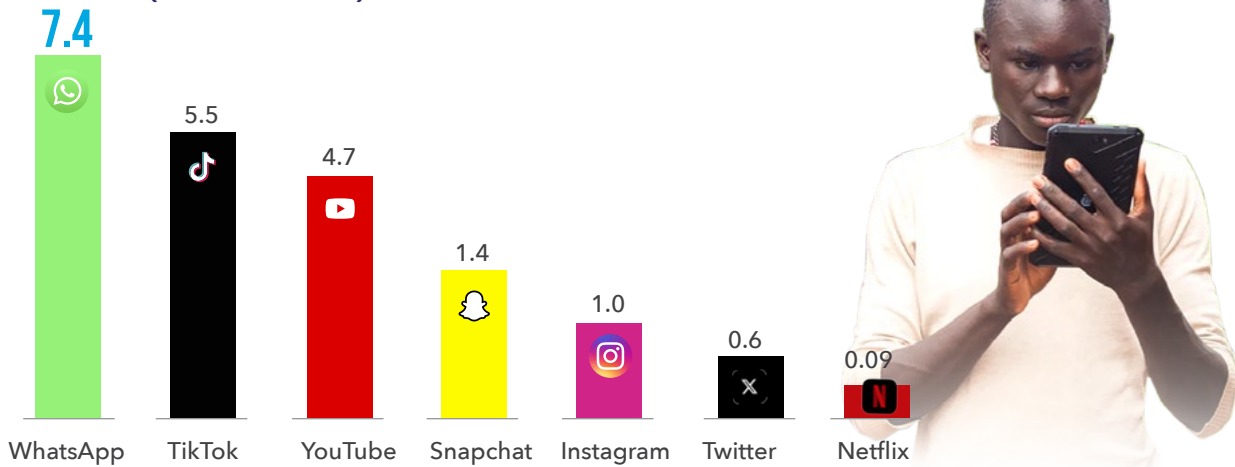
WhatsApp remains the most popular app due to the person-to-person communication features as well as multi-functionality including text, voice and video calling while video content streaming applications such as TikTok, Snapchat, and YouTube, have also driven significant user growth. Netflix, although still emerging, represents a growing trend towards streaming services that are redefining internet usage.

The National Payments System Act 2020 Heralds a New Era in Mobile Money Regulation

The National Payments System Act of Uganda is an important piece of legislation that regulates payments in the country covering a wide range of payment instruments including mobile money. Consequently, the mobile money landscape in Uganda has witnessed sweeping changes with the separation of mobile money services from telecom services regulated by UCC to a stand-alone business regulated by Bank of Uganda.

The Act provides the legal framework that establishes clear guidelines for licensing mobile money operators, ensuring they meet stringent financial security standards. It also promotes consumer protection by outlining dispute resolution mechanisms and requiring transparency in fees and charges.

There is currently a cross regulatory partnership between UCC and BoU where both parties work collaboratively to ensure a more holistic approach to regulating mobile money. While BoU's legal mandate focuses on financial aspects like consumer protection, anti-money laundering, and risk management, UCC maintains its role in regulating the underlying telecommunication infrastructure used for mobile money transactions.

Overall, the separation of mobile money from telecom regulation in Uganda represents a step towards a more robust and secure mobile money ecosystem with the cross-regulatory partnership and the NPS Act providing a strong foundation for growth, innovation, and ultimately, financial inclusion for Ugandans.

Service Usage and Traffic

Globally, the telecommunications sector is evolving rapidly with a significant shift from traditional voice services to data-driven communication platforms like social media and messaging apps. In Uganda, the younger demographic's preference for digital communication is expected to continue as digital platforms become more integral to everyday communication. In its regulatory role, UCC drives the growth of usage of voice, internet and mobile money while ensuring quality of service and fairness in pricing.

Traffic

Domestic Voice Traffic (Minutes)

Onnet Voice Traffic	Offnet Voice Traffic
70.1B	1.5B

Internet Traffic (GBs)

Mobile Internet Traffic	Fixed Internet Traffic
605.9M	63.56M

International Voice Traffic (Minutes)

Incoming Voice Traffic	Outgoing Voice Traffic
74.7M	34.4M

One Network Area (ONA) Traffic (Minutes)

ONA Incoming Traffic	ONA Outgoing Traffic
1.1B	116.7M

USSD Traffic (Sessions)

#123# 47B

Mobile Money Transactions (Number)

Transactions	P2P Transactions
5.4B	379M

Service Usage and Expenditure per Consumer

Onnet Voice	Offnet Voice	Data	SMS
2,366 MINS	53 MINS	41 GB	249 SMS
57,099 UGX	1,959 UGX	47,265 UGX	2,147 UGX

Service Usage and Traffic

Onnet Voice Traffic

The Uganda telecommunications sector has seen a steady rise in onnet voice traffic minutes (calls within the same network) over the past four years, with a combined increase of 26.5%. This growth is partly due to a shift from per-minute billing to bundled plans.

On average, customers used 2,000 onnet minutes per year over the last four years. However, this average has declined slightly in recent years, from 2,181 minutes in 2021 to 1,889 minutes in 2023.

Figure 22 Onnet Voice Traffic (Billions)

70.1

66.1

64.4

55.4

44.6

2019   2020   2021   2022   2023
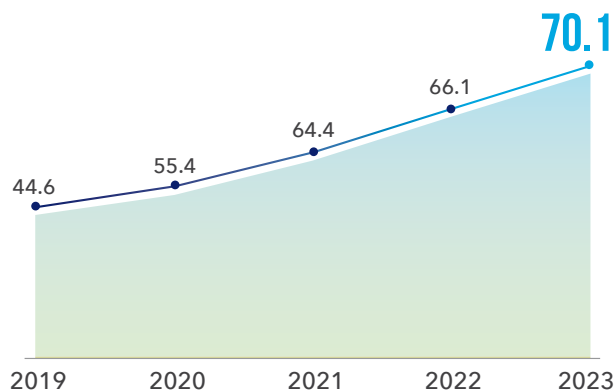
This decrease is likely due to the impact of Covid-19 and a significant increase in the number of mobile phone users (33.73% growth from 2020 to 2023). While the total volume of onnet traffic has risen, the number of users has grown at a faster rate, resulting in a lower average usage per customer.

Offnet Voice Traffic

Since 2010 when the telecommunication sector implemented reference interconnection rates, there has been a significant shift in offnet voice traffic. While the subsequent capping of the interconnection rates in 2018 further reduced offnet call costs, the launch of combo packages by MNOs in 2023 was a game-changer in the lives of consumers with offnet minutes growing from 622.7 million in 2020 to 1.4 billion minutes in 2023. In the same period, the average offnet minutes per consumer grew from 22.4 minutes in 2020 to 39.8 minutes in 2023.

Figure 23 Onnet Voice Traffic (Billions)

1.5

0.62   0.61   0.62

2020   2021   2022   2023
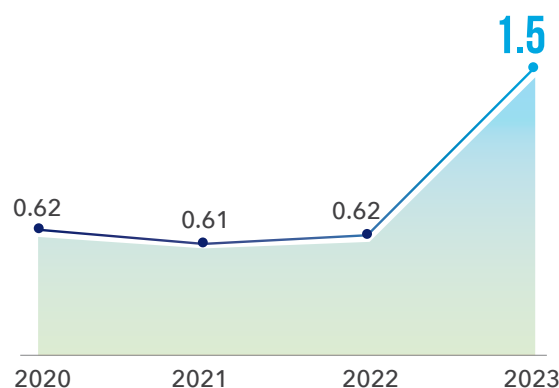
This shift in pricing structure, coupled with the affordability driven by the interconnection rate cap explains the substantial increase in offnet call traffic.

45

Regional Voice Traffic Distribution

As of December 2023, Central Region accounted for a total of 3.4 billion minutes of voice traffic, Western Region had 1.5 billion minutes, Eastern Region had 1.2 billion minutes while Northern Region racked up 865.6 million minutes.

| Figure 24 | Regional Voice Traffic Distribution |
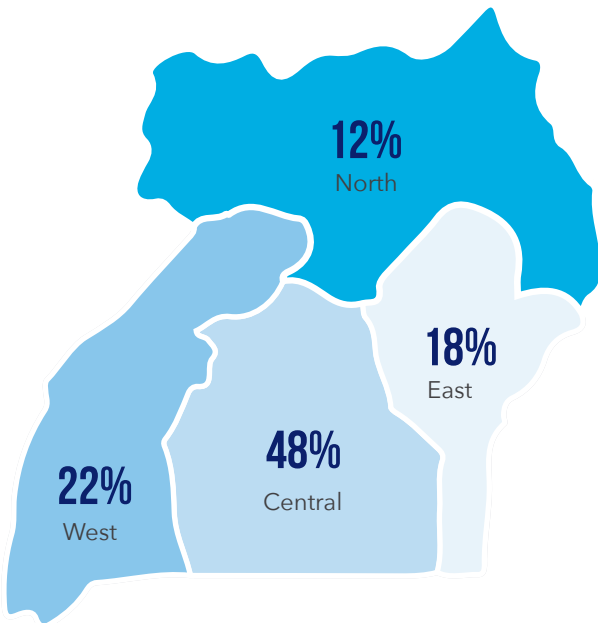
This distribution highlights the varying usage patterns and demand for telecommunications services across different parts of the country. Kampala Metropolitan area, the country's hub of commerce and capital city, contribute heavily to the minutes attributed to the Central Region.

Mobile Internet Traffic

Uganda has witnessed a substantial surge in mobile internet usage over the past few years from total mobile data traffic of 216.9 million GBs in 2020 to 605.9 million GBs in 2023.

| Figure 25 | Mobile Internet Traffic (Million GBs) |
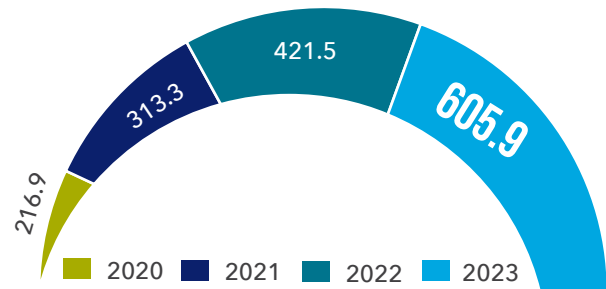
This growth is driven by tailored product offerings from MNOs including "three in one" packages that combine SMS, voice, and data services. These packages tailored to meet diverse consumer needs have encouraged higher data consumption. The cost of data has also reduced due to network efficiencies and increased customer base.

Did you know that Uganda is now a high-value mobile data market? With a monthly average consumption of 3 GBs per month, Uganda has exceeded the global 2 GB usage threshold for high-value mobile data consumers set by the ITU.

Fixed Internet Traffic

Fixed internet usage in Uganda has in the last few years grown four-fold, from 14.1 million GBs of fixed internet traffic in 2020 to 63.6 million GBS by 2023. In the same period, in 2020 each fixed internet subscriber used an average of 408 GBs annually, equating to about 34 GBs per month while this figure almost doubled to 1,431 GBs annually, and about 119 GBs per month.

Figure 26 Fixed Internet Traffic (Million GBs)
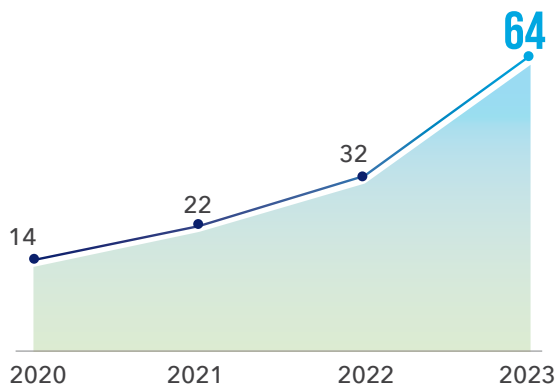
The improvement of undersea cable connections infrastructure in East Africa as well as enactment of new and more open telecom regulations have attracted new ISPs and ultimately led to increased competition. This has resulted in reduction of prices for high-speed internet for both businesses and households.

Regional Internet Traffic Distribution

Like other indicators of telecom performance, the Central Region continues to dominate internet traffic, accounting for 73% of the total at 42 million GBs. This is reflective of the higher concentration of high data consuming businesses and individuals in the Central Region, particularly in the Kampala Metropolitan area. The Western Region follows with 7 million GBs, representing 12%. The Eastern Region accounts for 5 million GBs, making up 9% of the total, while the Northern Region has the lowest usage at 3.6 million GBs, accounting for 6% of the total traffic.

Figure 27 Regional Internet Traffic Distribution
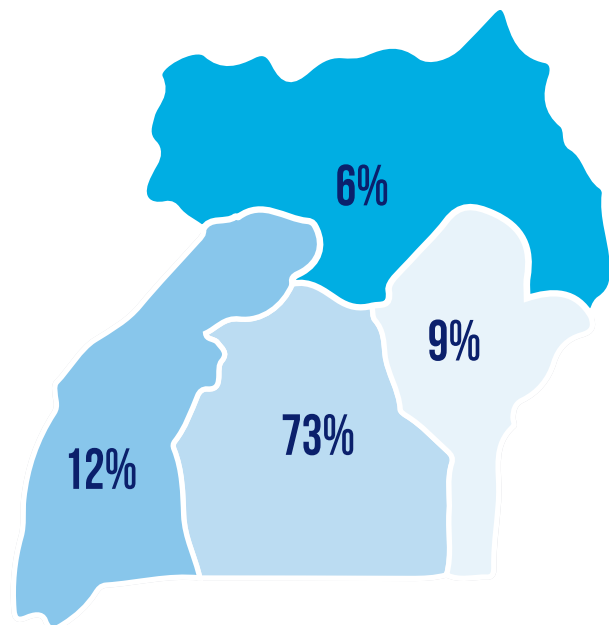
ONA In Traffic

As a member of One Network Area (ONA), Uganda has benefited from reduced roaming charges of call rates among the member countries of Kenya, Rwanda, South Sudan, Tanzania and Burundi. This has led to a steady increase of ONA incoming minutes from 587.6 million in 2020 to 1 billion minutes by 2023. ONA incoming minutes per active customer have in the same period increased from 21.2 in 2020 to 29.2 by 2023.

ONA Out Traffic

Whereas ONA outgoing minutes stood at 366.4 million in 2020, this figure dipped to 116.7 million by 2023, representing a decline of 68%. The minutes per customer fell from 13.2 in 2020 to just 3.14 in 2023, indicating a reduction of nearly 76%.

Figure 28 ONA Incoming Voice Traffic in Minutes (Millions)
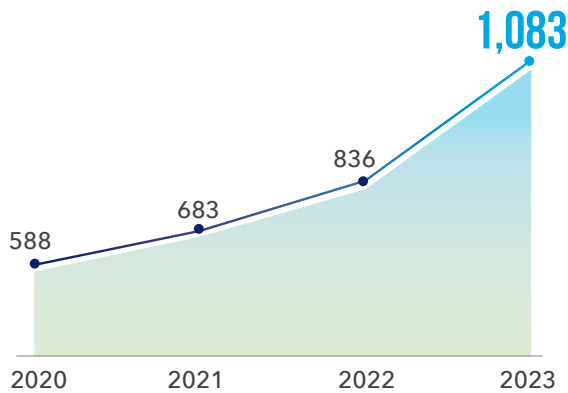
The attractive calling rates as well as regional integration have grown cross-border trade and movement and incentivised communication leading to higher voice traffic.

Figure 29 ONA Outgoing Voice Traffic in Minutes (Millions)
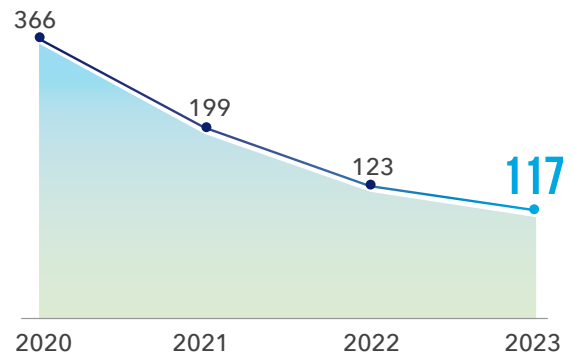
This sharp decline can be attributed to a shift in communication habits with more consumers making fewer traditional calls and opting for cheaper OTT data-based alternatives such as WhatsApp calls.

Leveraging ICT as an Enabler of Regional Integration

Interview With Ambassador Richard Kabonero, National Coordinator, Northern Corridor Integration Projects (NCIPS)

Ambassador Richard Kabonero is the Head, Regional Economic Cooperation at the Ministry of Foreign Affairs, Uganda. He is also the National Coordinator for the Northern Corridor Integration Projects (NCIPs). NCIPs initiative is a collaborative regional effort by Northern Corridor countries, including Kenya, Uganda, Rwanda, South Sudan, Tanzania and Burundi, to enhance infrastructure and boost economic development. The initiative focuses on improving transportation, energy, and ICT infrastructure to facilitate trade and movement within the region. In this interview, Ambassador Kabonero outlines the strides made in regional integration, particularly in the ICT sector. He also discusses the challenges encountered and the ambitious plans for fostering an inclusive digital economy in the region.

How has the Northern Corridor Integration Projects (NCIPs) initiative facilitated cross regional integration particularly in the ICT sector within and across the East African Community?

Investing in infrastructure links within the region is critical to unlocking the region's economic potential. The Northern Corridor Integration Projects (NCIPs) program is a regional development initiative that was initiated by H.E President Y.K. Museveni in June 2013 in Entebbe during the first Infrastructure Summit of the Heads of State of Uganda, Rwanda, and Kenya to fasttrack the implementation of integration projects within the partner states.

The NCIPs has been instrumental in fostering regional integration through concerted efforts in the ICT sector. Key achievements include:

- The establishment of the One Network Area (ONA) for voice, data and SMS which has dramatically increased traffic among partner states by over 900 times.

- The promotion of cross-border broadband connectivity in the partner states that has enabled the land-locked countries to be connected to undersea cables.

The establishment of the ONA for voice, data and SMS which has dramatically increased traffic among partner states by over 900 times

◈ Significant progress in implementing e-services across the region, including data sharing frameworks currently at partner state level and the integration of mobile financial services currently being fastracked, as well as ensuring mutual access to secure and reliable information.

The future holds even greater promise with the commitment of partner states to initiatives including fasttracking the modalities of establishing a regional owned satellite for communication; cooperation in cybersecurity and emerging technologies; establishment of an East African single digital market that will optimize technological efficiency within Partner States; policy interventions that can promote the affordability of smart devices, and harmonized approach to policies that facilitate data storage and management.

What are some of the major challenges the NCIPs has encountered in the implementation of regional projects? How have we overcome them?

The COVID-19 pandemic significantly impacted our progress, affecting resource mobilization and project implementation. Other challenges range from reduced external financing, debt burdens, procurement delays to political tensions in the region as well as lack of harmonisation standards of transboundary infrastructure projects. We also had not envisioned permanent roaming. To address these issues, we have commissioned a study on the ONA to account for emerging challenges like permanent roaming. We are also strengthening capacity building through the Human Resource Capacity Building Cluster.

Looking at NCIPs interventions in the ICT sector such as ONA, what are some of the most remarkable benefits to the citizens of the EAC countries? How are these benefits contributing towards engendering an inclusive digital economy for Ugandans and the region as a whole?

ONA has revolutionised communications and impacted on the ease of doing business, trade in services and movement of labour and services in Uganda and the region. For-instance, the traders and any traveler does not have to change SIM-cards or worry about cost of communicating, as the receiving of roaming calls have been zero rated in the region and roaming call costs are also relatively low.

This has enabled seamless and timeless linkages between and among the Mobile Network Operators and the regulators in the country and NCIPs region as a whole. On a whole, reduced roaming costs and seamless connectivity have empowered businesses and individuals alike, helping to foster an inclusive digital economy by breaking down barriers and creating opportunities for all.

What other key initiatives is the NCIPs focused on for implementation in the short and medium term?

We are prioritizing infrastructure development, including the completion of the Standard Gauge Railway (SGR), expanding connectivity to sea optical fiber cables, and developing inland waterways. Additionally, we aim to reduce air travel costs through airspace liberalization. Joint resource mobilization and fast-tracking project timelines are also key focus areas.

International Incoming Voice Traffic

There has been gradual reduction in international incoming voice traffic minutes over the past three years. From 72.7 million incoming minutes in 2020, the minutes increased to 81 million in 2021, reduced to 80 million in 2022 before dropping to 75 million in 2023. In 2020, each consumer received an average of 2.6 minutes which reduced to 2.0 minutes in 2023.

| Figure 30 | International Incoming Voice Traffic in Minutes (Millions) |
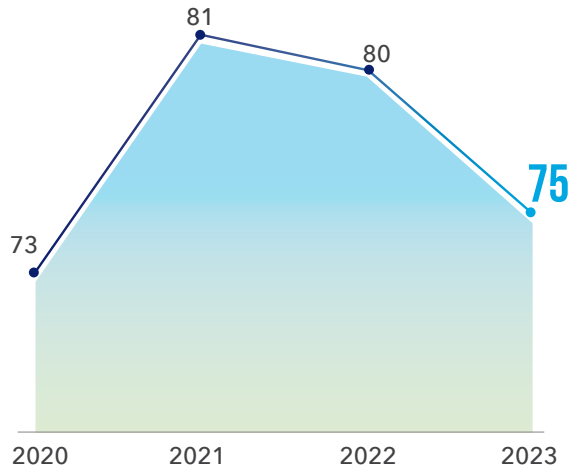
The reduction in international incoming voice traffic minutes in Uganda is attributed to the global trend of decreasing traditional voice calls due to the adoption and increasing usage of Voice over Internet Protocol (VoIP) services such as WhatsApp, etc.

International Outgoing Voice Traffic

As with international in coming traffic, the volume of international outgoing voice traffic from Uganda has also seen a consistent decline over the past years. While the volume of outgoing international minutes was approximately 50.4 million in 2020, this figure fell to 34.4 million minutes by 2023. In the same period, each customer that averaged 1.8 outgoing minutes in 2020 was down to only 0.9 minutes by 2023.

| Figure 31 | International Outgoing Voice Traffic in Minutes (Millions) |
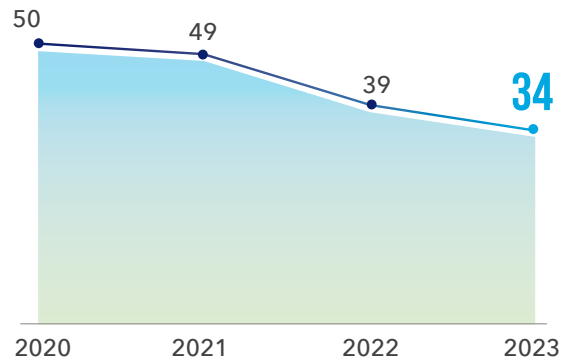
Again, this reduction is due to the global trend of decreasing traditional voice calls in favour of VoIP services.

USSD Traffic

In Uganda, USSD remains a critical access channel especially for mobile money services and users with low-end mobile phones that cannot support apps. USSD codes are used for a range of mobile money operations—from initiating to authenticating transactions, and as such the growth of mobile money activity translates into an equivalent rise in USSD sessions. In 2020, USSD traffic recorded approximately 26.8 billion sessions which rose to 46.9 billion sessions in 2023.

Figure 32 USSD Traffic (Billion Sessions)

37

33

27

47

■ 2020   ■ 2021   ■ 2022   ■ 2023
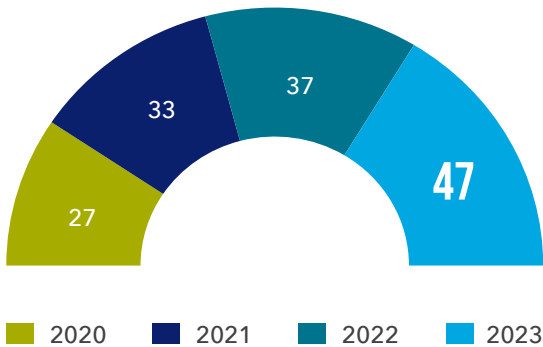
Mobile Money Transactions

Mobile money usage in Uganda has surged in recent years. Both the volume and value of transactions have grown significantly, driven by a variety of uses beyond person-to-person (P2P) transfers such as bill payments, insurance,purchases, and taxes. The volume of transactions grew from 2.8 billion in 2019 to 5.4 billion in 2023 while the transactions per user grew from 171 transactions per year in 2019 to 197 in 2023. In the same period, the value of transactions grew from 73.1 trillion in 2019 to 189 trillion in 2023, reflecting a compound annual growth rate (CAGR) of 14.8%.

Figure 33 **Volume of Mobile Money Transactions (Billions)**

2.8 — 2019
3.5 — 2020
4.3 — 2021
5.2 — 2022
5.4 — 2023
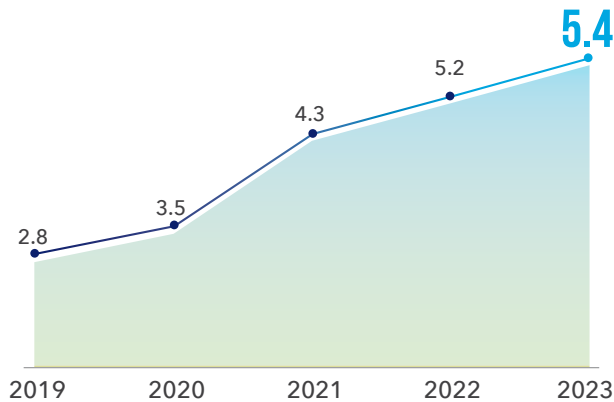
Mobile money has become a cornerstone of Uganda's financial landscape, offering convenience and accessibility for a growing user base. P2P transactions remain the primary driver, demonstrating the platform's crucial role in money transfers and payments within the country.

Affordability, Products and Pricing

Mobile Data Pricing

The cost of 1GB of data between 2019 and 2023 fell by 50% from UGX 10,000 to UGX 5,000. This is explained by the competition in the market and the attendant pricing innovations as more actors come into play.

Figure 34 **1 GB Monthly Price in Uganda over the years)**

45,000

10,000

5,000

■ 2013 ■ 2019 ■ 2020
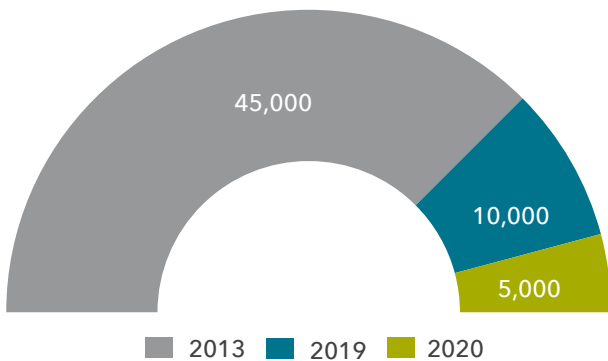
Although the cost of a GB of monthly data remains relatively high at 1.34 USD, it is fairly low within the region coming in after Rwanda at 0.76 USD.

Figure 35 **1 GB Monthly Global Price 2023 (USD)**

Uganda Av.
$1.3

EAC Regional Av.
$2.1

Africa Av.
$3.6

Global Av.
$2.6
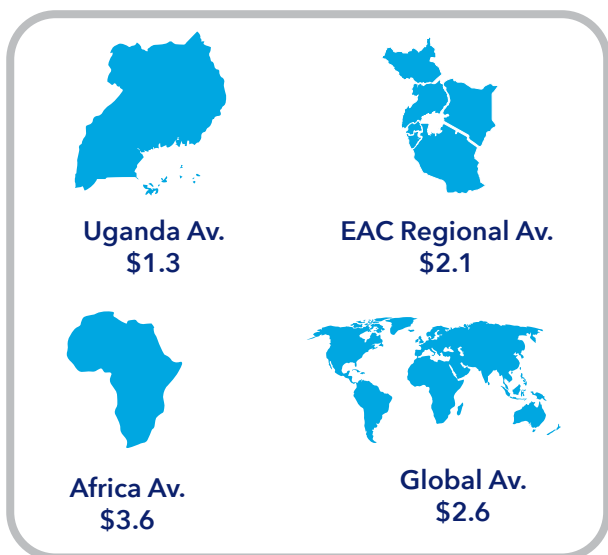
Data Source: cable.co.uk

Fiber to the Home (FTTH) Pricing

The price of a fiber to the home connection has fallen by 43% from UGX 276,000 in 2022 to UGX 160,000 in 2023.

Figure 35 **Price of FTTH (UGX)**

276,000

43%
Reduction

160,000

2022   2023
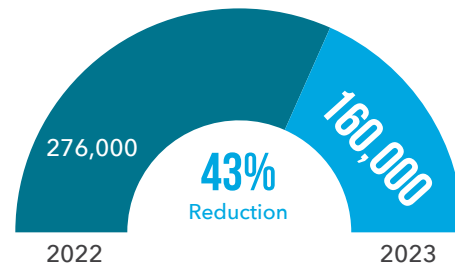
Figure 36 **Regional Mobile Data Pricing (1 GB)**

Rwanda	USD 0.8
Uganda	USD 1.3
Tanzania	USD 1.4
Kenya	USD 1.8
Burundi	USD 2.8
South Sudan	USD 6.3

Dedicated Internet Access (DIA) Pricing

The price of DIA fell from USD 619 in 2013 to USD 76 in 2023. Dedicated internet is usually purchased by businesses such as banks and hospitals.

Figure 36 DIA Price Trend

2013 — USD 619
2023 — USD 76

Onnet and Offnet Call Rates

The price of interconnection rates fell from UGX 181 in 2010 to UGX 45 in 2023 by 75%.

Figure 37 Mobile Termination Rates

2010 — UGX 181
2023 — UGX 45
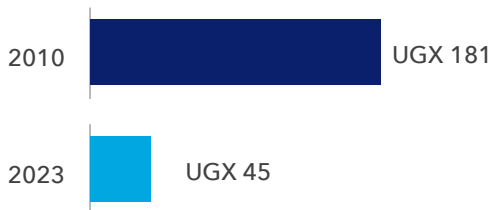
SMS Rates

The price of interconnection rates fell from UGX 25 in 2010 to UGX 3 in 2023 which is an eight times fall.

Figure 38 Interconnection Rates

2010 — UGX 25
2023 — UGX 3
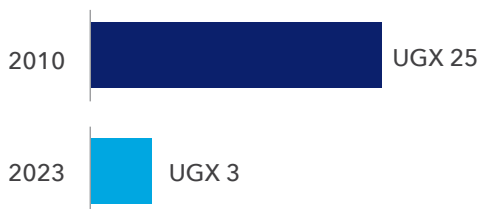
Milestones of Uganda's Broadband Journey: From Limited Access by the Elite to Universal Access

Access to the internet in Uganda has grown significantly, from the days when it was a preserve of the elite to the current status where any consumer can access it across Uganda.

Early Days (Pre-2010): Limited Access

In Uganda's pre-2010 landscape, internet access was a privilege, confined primarily to internet cafes, corporate offices, government institutions, and universities. The average Ugandan lacked the means to connect at home.

Mobile Revolution: Shifting the Paradigm

A turning point arrived when MNOs began to cater to diverse market segments. There was also at this time the rise of affordable smartphones alongside innovative MNO data plans which democratized internet access by strategically designing and pricing data packages. This, coupled with the economies of scale achieved by major telecom companies fuelled a surge in internet traffic.

Social Media Takes Centre Stage

The widespread adoption of social media applications, often referred to as Over-the-Top (OTT) services, has further amplified this growth. Social media has not only increased demand for data but has also become a primary driver of internet usage in Uganda with apps such as WhatsApp and TikTok among the most popular in Uganda.

From Service Fee to 'Call Boona': How cost-based MTRs are making phone calls in Uganda more affordable

Calling rates in Uganda have come a long way. From the early days when subscribers had to pay service fee just to keep their lines active, consumers in Uganda can now 'call boona'—call across networks courtesy of UCC's intervention in regulating mobile termination rates (MTRs).

MTRs determine the fee one mobile network operator charges another to complete a call on its network. Regulating these fees is therefore essential to ensuring that the cost of terminating calls is fair, and consumers are not exploited. UCC's regulatory oversight has ensured that these fees are cost-based, promoting:

Fair competition: By preventing excessive termination charges, UCC creates a more level playing field for MNOs. This has encouraged competition ultimately benefiting consumers through lower call prices.

Consumer protection: Cost-based MTRs prevent operators from charging inflated fees for call termination, ensuring consumers aren't paying an unfair premium for completing calls thereby fostering affordability and transparency.

Affordability: The lower cost of calls has made it affordable for more and more people to make calls hence lowering the cost of doing business for consumers in Uganda.

Overall, UCC's regulation of MTRs plays a vital role in fostering a fair, competitive, and affordable mobile telecommunications market in Uganda. This benefits both consumers and operators by promoting innovation, transparency, and ultimately, a better mobile user experience for all.

Annual Customer Service Expenditure

Service Usage and Expenditure Insights 2023

Offnet Expenditure
- 2022: 923
- 2023: 1,959

Onnet Expenditure
- 2023: 57,099
- 2022: 58,361

Mobile Money Transaction — Value per P2P Transaction (UGX)
- 2023: 85,768
- 2022: 82,586

SMS Expenditure
- 2023: 2,147
- 2022: 2,270

Mobile Data Expenditure
- 2023: 47,265
- 2022: 46,036
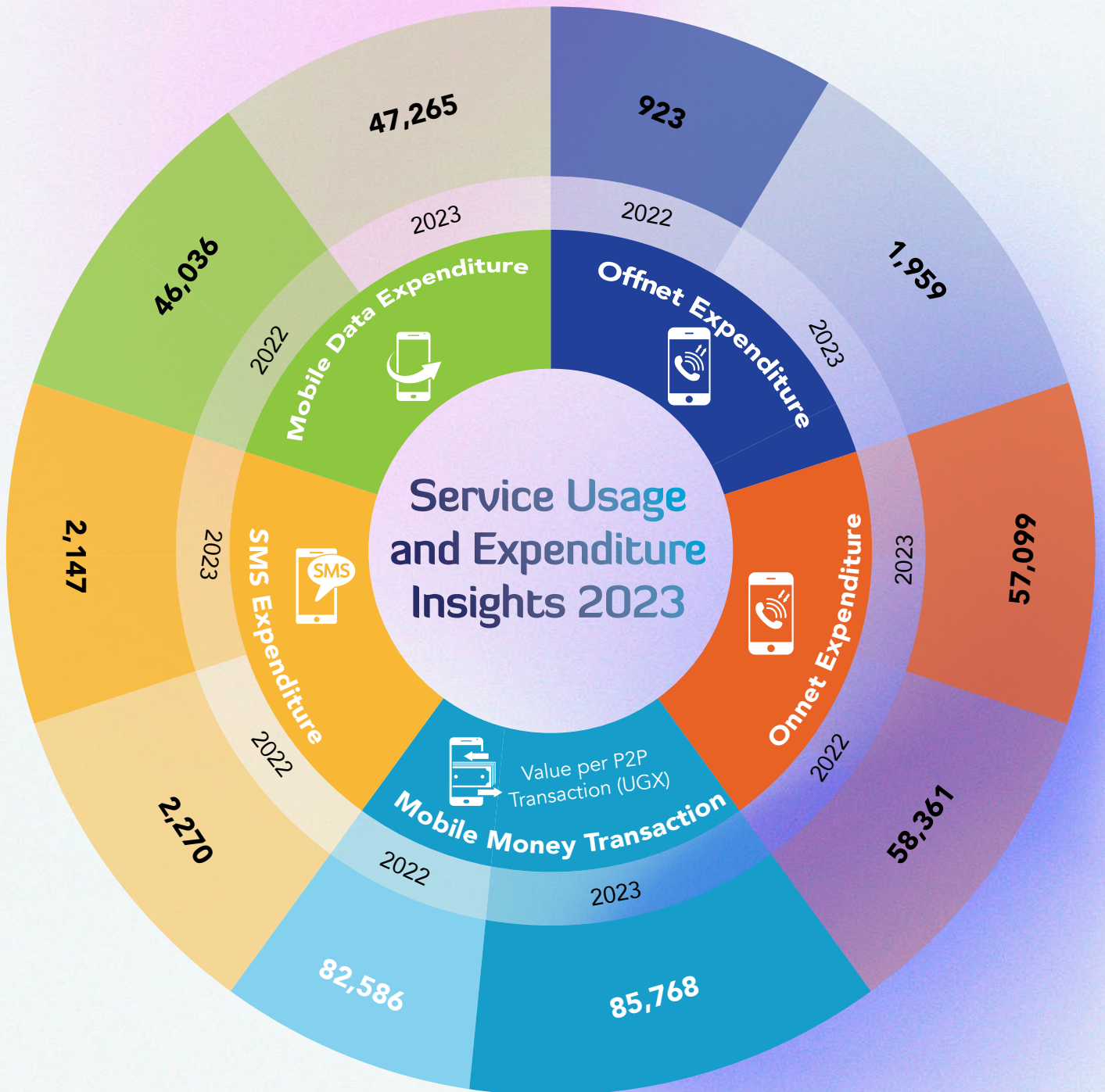
Telecom Financial Performance 2023

Revenue (Trillion UGX)

5.6

Towers	0.9
Mobile Voice	2.0
Mobile Data	1.3
Other Services	1.4

Investment (Trillion UGX)

1.4

Equipment and Network	0.7
Capital Work in Progress	0.6
Other Services	0.1
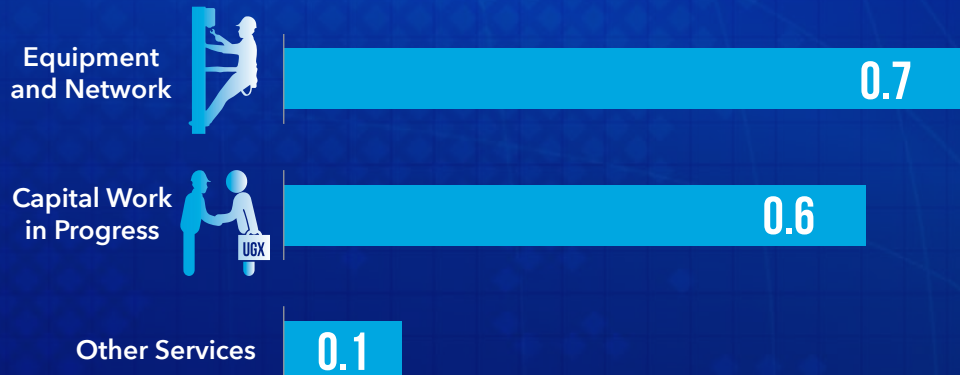
Tax Contribution (Trillion UGX)

Financial Year 2023-2024	7.2
Financial Year 2022-2023	6.6

Source: Uganda Revenue Authority (URA)

Financial Performance

Turnover

The revenue generated by the Ugandan ICT sector has demonstrated steady growth over the past four years from UGX 3.98 trillion in 2020, to UGX 5.61 trillion in 2023, reflecting a year-on-year growth of 14.1%.

Figure 39 Gross Revenue (UGX Trillion)
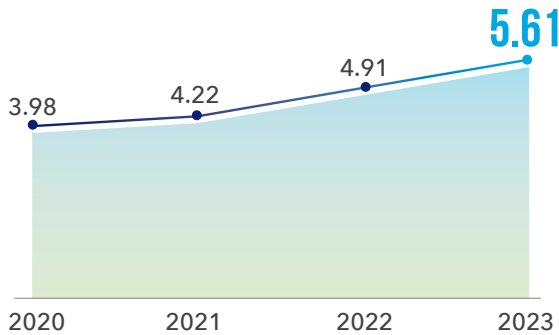
	Revenue Growth % Mobile Data	Revenue Growth % Mobile Voice	Revenue Growth % Tower Lease
2023	19%	9%	15%
	1.3 TRILLION	2 TRILLION	0.9 TRILLION

This growth is primarily driven by mobile data and voice services, with tower lease services also contributing substantially as follows: In 2019, mobile data contributed UGX 0.66, voice services UGX 1.47 trillion, while tower lease raked in UGX 0.27 trillion. By 2023, these figures had grown to: mobile data – UGX 1.32 trillion; voice services – UGX 2.02 trillion; and tower lease – UGX 0.88 trillion.

Investment Performance

Uganda's ICT sector has attracted significant investments in recent years. From investment of UGX 594.5 billion in 2020, the sector has grown significantly recording an investment base UGX 1.38 trillion by 2023.

Figure 40 Investment Performance (UGX Trillion)
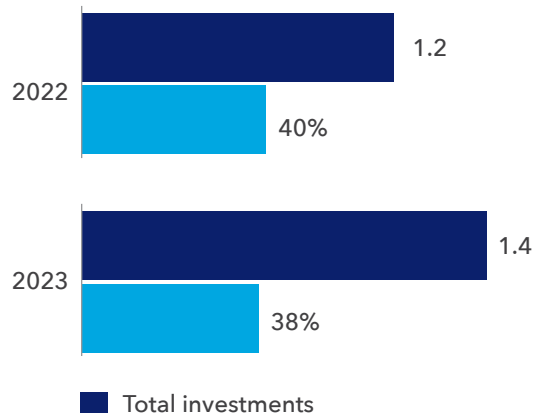
■ Total investments

The growth in investment is a positive indicator for Uganda ultimately leading to improvements and expansion in network infrastructure and service quality and laying the groundwork for the introduction of new data-driven services.

In 2020, the investment-to-revenue ratio was 0.15, indicating that for every shilling invested, approximately 6.7 shillings were generated in revenue. By 2023, the ratio had slightly improved to 0.25, reflecting the efficiency and impact of investments in driving revenue.

Sector Challenges

Lack of a countrywide electricity grid coverage

While electricity infrastructure is essential for building ICT infrastructure, Uganda's electricity access at only 22% makes it costly to set up towers with many relying on solar power which raises setup costs to over UGX 250 million per tower.

To mitigate this, UCC and relevant MDAs are collaborating to improve ICT infrastructure planning and expand services nationwide.

Vandalism

This is a major challenge with critical ICT infrastructure such as fiber lines and tower components often targeted causing huge financial losses in millions of dollars in repairs and replacements.

To combat this, ICT infrastructure has been classified as critical national infrastructure, a security task force has been created, punitive penalties for vandals instituted, and scrap dealers are now regulated.

Delays in issuing tower setup permits

Obtaining tower construction permits from government agencies like NEMA and local councils has become significantly slower, increasing from 82 days in 2020 to 382 days in 2023. This has caused substantial financial losses for both the government and telecom companies.

To expedite permit approvals, the UCC and NEMA are working on a clear, actionable plan.

Fraud and Cyber Crime

With the country's digital development not matched by proportionate growth in digital literacy, there has been an increase in cases of fraud and cybercrime ranging from mobile money to revenge pornography.

To address this, the UCC established the Uganda National Computer Emergency Response Team/Coordination Centre (CERT/ CC) for incident handling, analysis and investigation, public awareness, etc.

Consumer Protection and Empowerment

Consumer protection and empowerment is critical to the development of a modern communications sector. It is the foundation for an inclusive digital economy. The Commission's consumer protection mandate is delivered through three main approaches: consumer awareness, complaints and advocacy management and, partnerships and collaborations.

Consumer Protection and Empowerment

Age Distribution (Years)
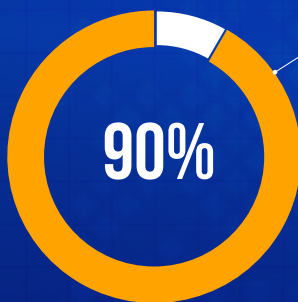
Total Complaints
830,477

Age Group	Complaints
Above 60	105,922
41-60	184,747
20-40	534,162
Below 20	5,646

Complaint Channels

90%

Channel	Complaints
Phone call	748,632
Walk-in	77,959
Social Media	1,823
Email	2,063

Complaint Resolution Times (Days)

1	2-7	Above 7
748,960	51,310	30,207

Complaint Categorization

Data & Internet	Account	Device & SIM	Quality of Service	Network	Fraud
230,679	214,401	70,348	263,141	3,508	46,594
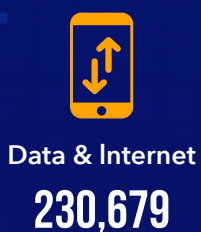
Consumer Education and Awareness

Four years ago, the typical Ugandan consumer primarily focused on the availability of services in their area, particularly voice services and mobile money. The evolution of the ICT sector in the last few years has engendered a more engaged and informed consumer across various markets. Consequently, in line with the consumer protection mandate, UCC proactively carries out Consumer Education and Awareness initiatives, programs and events throughout the year to continuously inform, educate and empower consumers to become adept with modern 21st century essential communication and digital skills so as to catalyse an inclusive digital economy.

Consumer Rights and Obligations

Consumer Rights and Protection is an integral component and cornerstone of UCC's broader consumer education and awareness initiatives. UCC strives to educate and empower consumers not only to understand their rights but also to be fully cognisant of their obligations as consumers. The consumer rights are:

- **Right to Access**
- **Right to Information**
- **Right to Quality of Service**
- **Right to Fair Treatment**
- **Right to Complain**
- **Right to Seek Redress**
- **Right of Safety and Security**
- **Right to Consumer Education**
- **Right to Notification of Termination**
- **Right to Representation**
- **Right to Access Billing Information**

On the other hand, the consumer obligations are:

Prompt Payment of Bills

Protection of Communication Facilities

Environmental Protection
Dispose off non functional devices responsibly

Digital Literacy

Awareness
Be alert and know your rights

Ethical Use

Action
Be assertive to ensure fair service

Reporting Security Concerns

Protecting Consumer Data

The UCC plays an oversight role in the SIM card registration Know-Your-Customer (KYC) processes in Uganda. This involves collaborating with organisations like the National Identification and Registration Authority (NIRA) to ensure that personal data collected during registration is handled according to the Data Protection and Privacy Act (DPPA) of 2019.

The UCC undertakes various activities to ensure data protection and privacy in SIM card registration, as outlined in their 2020-2023 Data Protection & Privacy Scope of Activities document. A core facet of these activities has been building a knowledge base among consumers using the CCP's

Industry Surveillance and Monitoring

Protecting Consumer Rights Through Monitoring and Audits is part of UCC's commitment to consumer protection. The Commission actively monitors service provider compliance to ensure they comply with established regulations. This includes assessment complaints handling procedures, access to consumer help points, display of consumer help information, customer service standards, etc. To monitor operator practices, the Commission conducts periodic "mystery shopping" visits to service centres, evaluating factors like informed choice, customer service, and accessibility for people with disabilities.

The Commission also Ensures Consumer Protection through monitoring activities that focus on ensuring operators fulfil their obligations to consumers, including: informed choice; clear contracts; billing transparency; credit and debt management.

Communications Consumer Parliament

UCC established the Communications Consumer Parliament (CCP) in 2014 to fulfil its consumer protection mandate. The CCP has evolved to address various consumer issues and adapt to changing consumers' day to day challenges. It focuses on thematic areas shaped by current industry trends and consumer concerns specifically around the considerations of: consumer engagement; regulatory insight; industry participation; education and awareness; feedback mechanism; as well as policy development.

The Communications Consumer Parliament as a Driver of Consumer Education and Empowerment

Every year, UCC holds the Communications Consumer Parliament (CCP) under different themes. This event is hosted in different regions across the country. In 2023, the 13th edition of the Communications Consumer Parliament was held in Kamuli District. The event was preceded by week-long consumer empowerment activities in the Busoga sub-region conducted in the districts of Kamuli, Iganga, Luuka and Jinja included consumer health camps, a youth in ICT seminar, a cybersecurity challenge, and radio talk-shows, with an audience of 200 people and a total reach of 10,000 people across the 9 days.

The CCP and associated consumer empowerment activities are geared towards the delivery of consumer education on fraud, device verification, and consumer self-help tips; strengthening dialogue between consumers, service providers and regulators;

and addressing consumer issues arising from UCC's feedback channels (surveys, outreach activity reports, call centre). This initiative seeks to facilitate multi-stakeholder engagement by bringing together regulators, service providers and consumers to discuss pressing communication issues.

Complaints Handling and Management

UCC is mandated to receive, investigate and arbitrate complaints relating to communication services and take appropriate action. As such, UCC receives second-level complaints from consumers after they have been to their respective service providers and are dissatisfied with the outcome or are unable to access their providers. Therefore, complaints management is a structured process of receiving, recording, investigating, responding to and resolving complaints.

With the increased uptake of voice, mobile data and mobile money services usage as well as other ICT products, it is inevitable that consumers have become more aware of the complaint and redress channels. These channels are structured into two levels: **Tier One** mechanisms at Mobile Network Operators (MNOs) and **Tier Two** mechanisms managed by the UCC's Consumer Affairs team.

Tier One complaints are handled by MNOs while Tier Two complaints are managed by the UCC's Consumer Affairs team

Tier One Complaints

Complaint Channel

The phone call channel saw a significant increase of 27.6%, indicating its growing importance as a primary complaint medium. This suggests that consumers find phone calls a convenient and effective way to seek redress. Meanwhile, walk-in complaints drastically decreased by 81.3%, suggesting a shift towards remote communication channels, likely accelerated by advancements in digital customer service platforms and a preference for more immediate interaction methods. Email and Social Media complaints also reduced significantly, which might point to an underutilization of these channels or potential areas for improvement in their responsiveness and effectiveness.

Total Complaints

830,477

Complaint Channels

Phone call
748,632

2022	2023
586,517	748,632

Social Media
1,823

2022	2023
3,736	1,823

Walk-in
77,959

2022	2023
415,948	77,959

Email
2,063

2022	2023
20,834	2,063

Complaint Category

Quality of service complaints surged by 144.8%, indicating increased consumer expectations and awareness. This rise emphasizes the need for continuous improvement in service delivery and monitoring to meet evolving consumer standards. Fraud-related complaints saw an alarming rise of 1480.2%, necessitating urgent intervention and enhanced consumer education on fraud prevention and detection. Although data and Internet related complaints reduced by 15.3%, they still constitute a significant portion of overall complaints, reflecting ongoing issues in connectivity and data services that require sustained attention.

Total Complaints

830,477

Complaint Categorization

Account

2022	2023
370,021	214,401

Data & Internet

2022	2023
272,507	230,679

Device & SIM

2022	2023
275,169	70,348

Quality of Service

2022	2023
107,479	263,141

Network

2022	2023
4,242	3,508

Fraud

2022	2023
2,949	46,594

Others

2022	2023
5,486	2,726
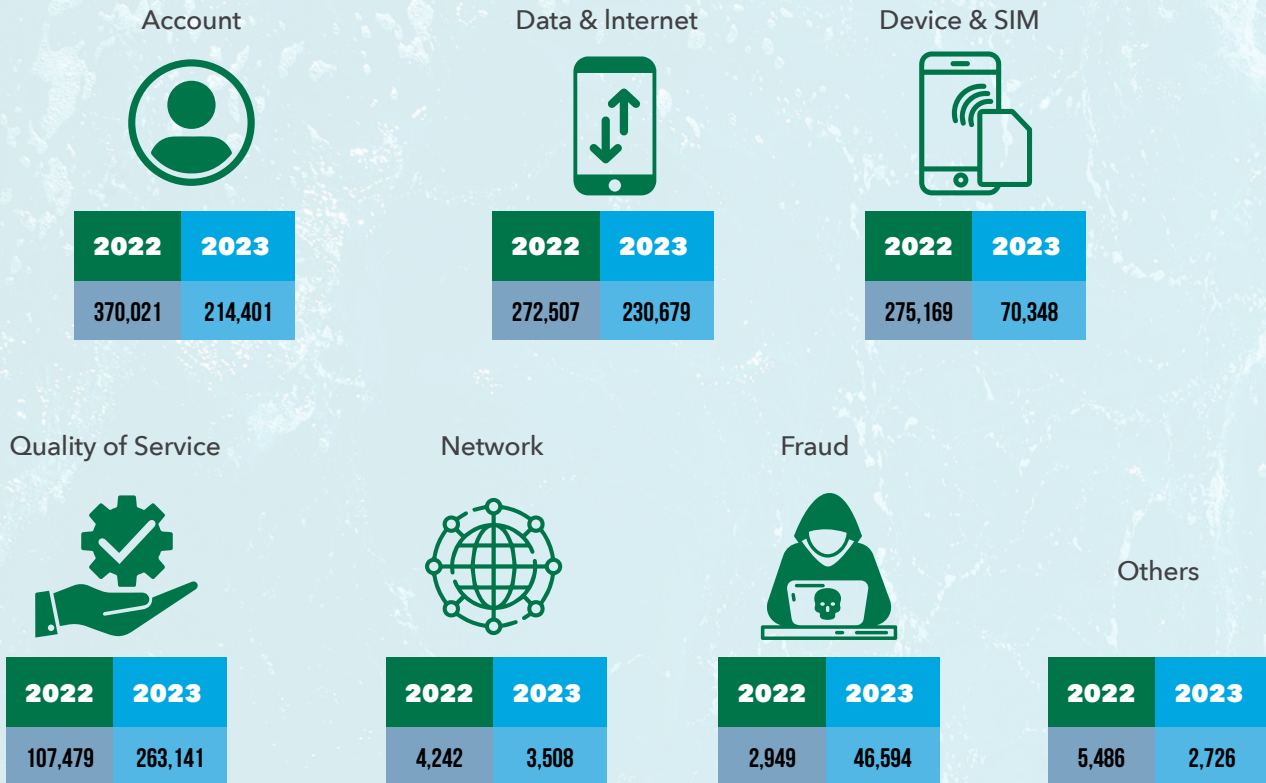
The substantial decrease in device and SIM related complaints (-74.4%) and account complaints (-42.0%) suggests effective resolutions and improved service management in these areas. These decreases indicate that previous interventions targeting these specific issues have been successful, leading to better consumer experiences and fewer complaints.

Age Group

The year 2023 saw a commendable shift in complaints by age group. There was a significant decrease in complaints from the below 20 age group (-84.4%) and those above 80 (-42.6%). This decrease indicates improved satisfaction among younger and older consumers, likely due to targeted educational initiatives and enhanced service delivery tailored to these demographics. Conversely, the 61-80 age group saw an increase of 16%, suggesting that this demographic may be encountering new challenges or that their expectations are rising, necessitating further attention and support.

Total Complaints

830,477

Age Distribution

Below 20
5,646
1%

20-40
534,162
64%

41-60
184,747
22%

Above 60
105,922
13%
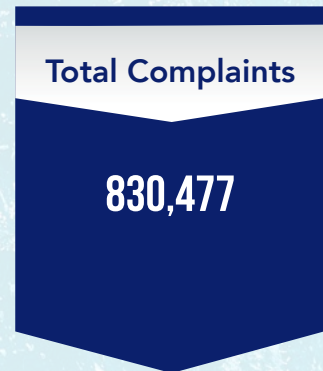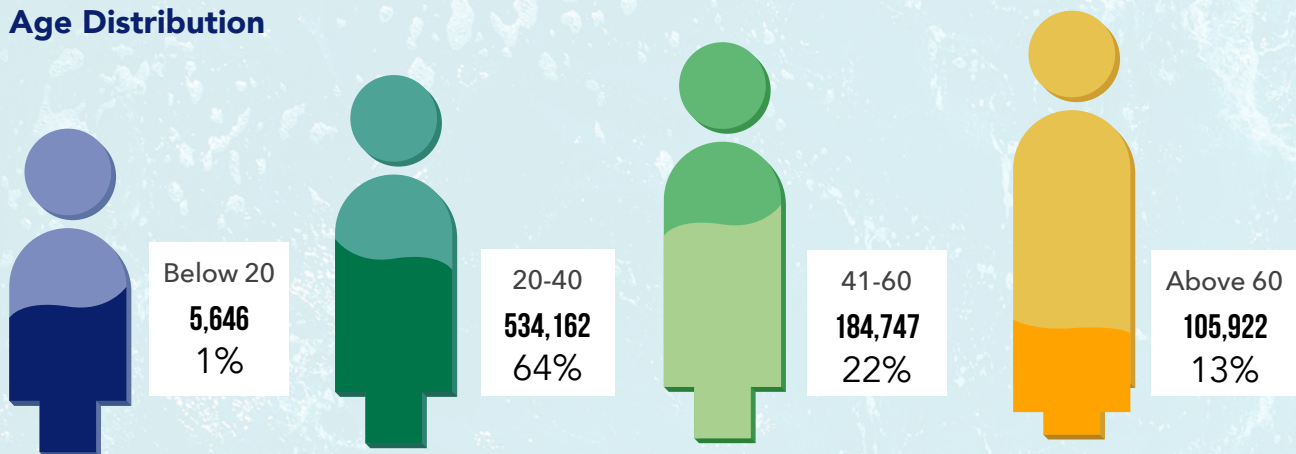
Gender

Complaints from male consumers increased by 12.1%, while those from female consumers rose by 25.4%. This increase highlights a growing awareness and willingness to report issues among both genders. The higher increase among female consumers reflects greater responsiveness to outreach and empowerment programs.

Total Complaints

830,477

2022	2023
586,517	314,064

2022	2023
448,616	516,414
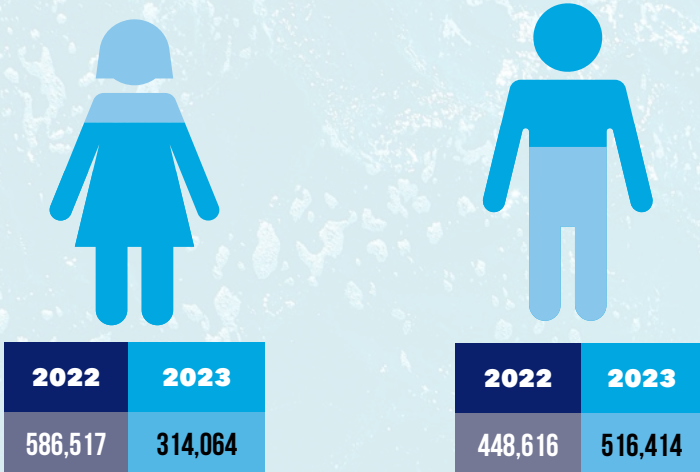
Resolution Time

Most complaints are resolved within 24 hours, although there was a reduction of 18% in this category. This indicates that while quick resolutions remain the norm, there are increasing complexities in some cases. Complaints taking 8-15 days increased by 79.7%, reflecting more complex issues requiring extended resolution times. Further, there was a 24.5% increase in complaints taking over 30 days, highlighting areas in need of process improvements. These trends suggest that while efficiency in handling straightforward issues is high.

Total Complaints

830,477

Complaint Resolution Times

24 HOURS

2022	2023
913,844	748,960

2-7 Days
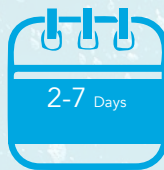
2022	2023
71,302	51,310

Above 7 Days

2022	2023
52,152	30,207

Tier Two Complaints

Complaints that are not addressed at MNO level are escalated to the UCC. 95 % of the total complaints received by the Consumer Affairs team are telecommunications complaints. This indicates that customers are more familiar with telecommunication services and primarily associate UCC with telecommunications regulation. Complaints from Broadcasting as well as Post and courier escalated to UCC are also gradually increasing.

Distribution across the Complaints Categories over the years

	Account	Broadcasting	Data & Internet	Device & SIM	Fraud	Postal & Courier	Quality of Service	Unsolicited Messages
2023	352	35	18	141	318	2	46	5
2022	277	40	56	78	365	0	49	7
2021	357	59	31	240	139	2	52	8
2020	79	56	30	782	126	0	63	11

The majority of complaints received are account-related
These include: account status, balance inquiries, failed payments among others.

Complaints Resolution Times (Days)

	1	2-7	8-15	Above 15
2023	492	296	89	43
2022	485	267	91	29
2021	585	153	79	71
2020	597	368	98	84

Evolution of Complaints Channels over the Years

	Phone call	Walk-in	Social Media	Email
2023	722	39	130	29
2022	655	38	137	42
2021	625	151	28	83
2020	679	461	1	6

Trends in Consumer Complaints

Since 2020, the number of complaints the Commission receives has relatively remained stable. As of 2023, the Commission received an approximate average of 1,000 complaints.

The channels through which these complaints are submitted, however, have evolved over time. In 2020, 59% of complaints were made via phone calls, a figure that increased to 78% in 2023. Conversely, walk-in complaints decreased significantly from 40% in 2020 to 4% in 2023, reflecting a consumer preference for non-human interaction.

The most common complaint category in 2020 was device and SIM-related issues, which accounted for 68% of all complaints. However, by 2023, this category accounted for only 15% of the complaints. As consumers' usage of mobile services has expanded, mobile-related fraud complaints have increased significantly, from 11% in 2020 to 35% in 2023.

The Commission has maintained a consistent consumer complaint resolution rate. In 2020, 52% of complaints were resolved within 24 hours, a figure that increased slightly to 53% in 2023. The proportion of complaints taking more than 30 days to resolve has decreased from 2% in 2020 to 1% in 2023.

Partnerships, Collaboration and Cross Regulation

To address specific consumer needs, UCC has partnered with various consumer advocacy organisations. These collaborations leverage the respective organisations' expertise and public interactions within their focus areas.

Partners include the Federation of Small and Medium Sized Enterprises (FSME), Makerere University Business School (MUBS), Centre for Technology Disputes Resolution-Uganda (CTDR-U), Anti Counterfeit Network, Bank of Uganda, Office of the Prime Minister, and National Identification & Registration Authority (NIRA). A notable outcome of these partnerships is the 2022 Anti Counterfeit Campaign, "SIMU Klear" that aims to eliminate the sale, distribution, and use of illegitimate devices in the market.

Putting the Consumer at the heart of our Operations

Over the years, UCC has instituted a robust system for consumer complaints and management. These queries are typically handled in two tiers—Tier One and Tier Two. In Tier One, consumers address their complaints to their respective telecom service providers via phone calls, walk-ins to service centres, social media or emails. Queries that are unresolved under Tier One are escalated to UCC which is Tier Two. Over the past year, majority of the complaints (32%) handled in Tier Two were to do with quality of service.

Special Intervention Programs

The Simu Klear Campaign

The Simu Kear is a public awareness campaign on the illegitimate communication devices. This Anti-Illegitimate Communications (ICD) project implementation roadmap has three main phases—Stakeholder Engagement (Phase One), Communication (Phase Two) and Enforcement (Phase Three). The countrywide campaign was held over two weeks in August 2023 was the second phase of the project whose outcomes shall inform and support the Enforcement phase.

The campaign message highlighted:

❯ How to identify an illegitimate device

❯ The risks of an illegitimate device

❯ Mechanisms for redress and further engagement.

Overall, the campaign message was delivered in one common statement, 'Know-Your-Phone' that was translated in six regional languages.

Outdoor Public Activations

Districts	Estimated Reach
105	2M

Mini Workshops and group Engagements

Districts	Estimated Reach
17	2,275

Radio Talk shows

Districts	Estimated Reach
18	17.5M

Radio Announcements

Districts	Estimated Reach
17	17.5M

Direct Engagements by Foot-soldiers

Agents	Estimated Reach
30	232,754

Consumer Survey using Kobo collect App

Estimated Reach
37,098

Consumer Affairs Social handles

Estimated Reach
46,967

Total Reach

19.8M

DID YOU KNOW?

All phones have an **IMEI number** that proves they are legitimate. **Dial *197*4#** to check if your phone is legitimate and safe. IMEIs are used to help track down and secure lost or stolen phones. Not only do fraudulent and counterfeit phones lead to degraded user experience as a result of their poor design and low-quality components, they also put the user at a risk of crime.

Tonfera Campaign

'*Tonfera*' is a Luganda word that means 'do not con, dupe or fool me'. The Tonfera campaign is a digital awareness initiative by UCC to raise consumer awareness about emerging issues where unscrupulous people take advantage of consumers limited digital literacy to commit digital and cyber fraud.

This fraud usually takes the following forms:

Digital Financial Fraud: This is a growing and rather alarming concern in Uganda. While bringing numerous benefits, the rapid expansion of mobile money and digital banking services have created opporitunities for cyber criminals. The most rampant type of this fraud is mobile money fraud which includes unauthorized access to mobile money accounts, SIM swapping, phishing, and impersonation scams.

Impersonation/Character Theft: This involves assuming the identity of a trusted individual or entity to deceive victims into revealing sensitive financial information. Fraudsters often use social media, phone calls, or emails to build trust with their targets posing as MNO officials, mobile money agents, or even friends and family members information to obtain information they use to initiate unauthorized transactions, transfer funds, or empty victims' accounts.
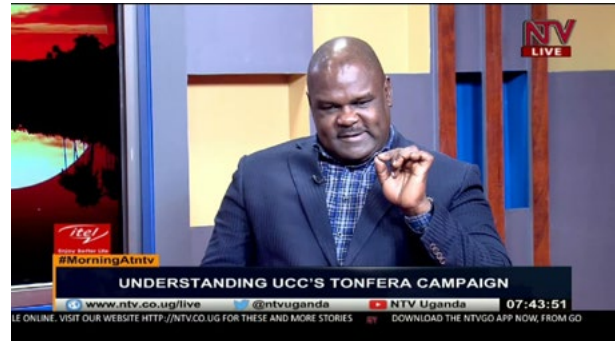
Misinformation and Fake news: Like in other countries, the rapid growth of digital technology and social media has amplified the spread of false information. Such false information is recipe for political instability, social division and economic loss.

The Tonfera campaign was executed using both digital media and mainstream media, with the key focus pillars of the campaign communication being:

1. Fraud and on-line safety
2. Sim card Registration
3. Misinformation and fake news
4. Digital transparency and accountability
5. Consumer privacy and data protection

Overall, the campaign was able to reach and empower a minimum of 5 million Ugandan adults on several fraud prevention measures.

> **Overall, the campaign was able to reach and empower a minimum of 5 million Ugandan adults on several fraud prevention measures**

Youth Empowerment Program

The youth empowerment program is an intervention that is purposed to raise awareness among the youth, especially school going young people on different existential issues that if left unattended could prove harmful.

Globally, the digital revolution has brought some unintended consequences such as online safety, pornography, impersonation, fraud, etc. to which the youth are easy prey. The Commission's youth empowerment program therefore seeks to reach out to the school going youth to empower them with the requisite digital literacy to keep safe and stay clear of harm's way.

The initiative also encourages the youth towards responsible usage of digital spaces.

Post and Courier

Postal and courier services are distinct but related systems that play a crucial role in facilitating communication and trade by ensuring efficient and reliable movement of goods, services, and information. In Uganda, postal services are exclusively provided by government which shares the responsibility of providing courier services with licensed private actors. Postal and courier services are an integral part of the vision for a robust communications sector that fosters economic development.

Infrastructure & Coverage

Fleet	Post Office Outlets	Drop and Pick Points	Physical Boxes	Electronic Addresses
1,303	96	264	120,000	51,700
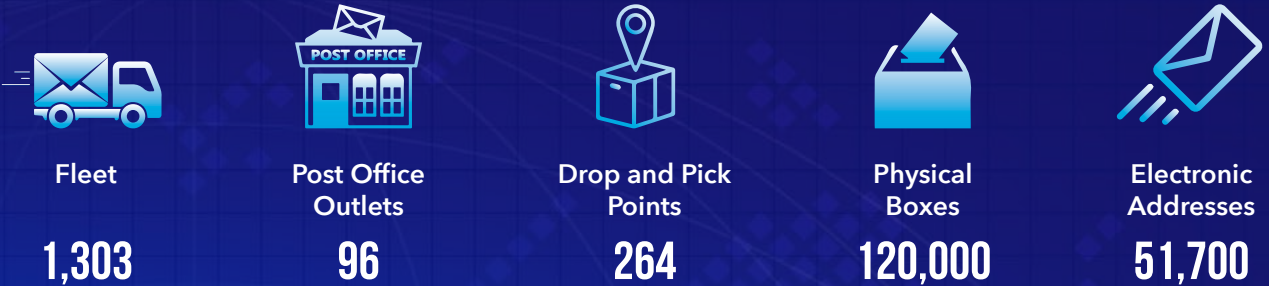
Service Usage Insights

Domestic Traffic (Letters and Packages)

East Africa Traffic

Parcels	Packets	Other Packages (E-commerce)	EA Incoming	EA Outgoing
12,771	22,599	724,415	15,943	6,725

International Traffic

International Incoming
373,762

International Outgoing
358,174

Expedited Mail Service (EMS)

Expedited Mail Service (UPL)
8,448

Timeline of Modern Postal Services in Uganda
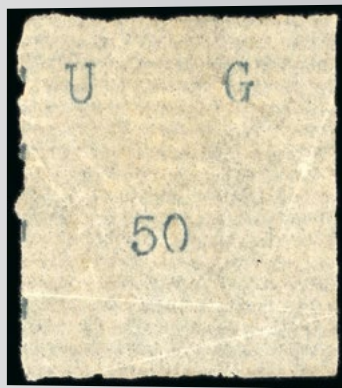
1895 In Uganda, like in other parts of the world, written messages were initially carried by mail runners stationed at various points along specific routes.

In **1895** Rev. Earnest Miller of the Church Missionaries Society designed and produced the first postage stamp using his typewriter, the only one in the country at the time.

1990 In the early 1990s, the Uganda Post Ltd (UPL), was incorporated under the Companies Act. As profiled in the Communications Act 2013, UPL, the national designated operator is responsible for the provision of the Universal Postal Service (UPS) to all Ugandans up to the last mile.

Number of licensees

2020	2021	2022	2023
30	33	35	43

Courier Operators

The postal and courier services market is currently shared by some formidable operators that include private courier companies, boda-bodas and taxis across the country. The number of licensed courier operators has grown from 18 in 2017 to 43 in 2023.

Table 1   Licensed courier operators over the years

License Category	Number of Licensed Operators						
	2017	2018	2019	2020	2021	2022	2023
International	7	6	7	7	7	7	7
East Africa	3	3	4	4	4	2	2
Domestic	9	7	16	17	20	24	26
Intercity	0	1	2	2	2	2	8
Total	19	17	29	30	33	35	43

The License Categories

Over the years the sector has become more attractive to new operators with increased delivery of mail items between specific cities and towns in the country. These operators are mainly domestic passenger bus operators, newspaper transporters and other cargo distributors who run transport facilities on specific routes. This led to the creation of the fifth license category known as Inter City Courier Services.

Table 2   Summary of current licensing framework

License Category	Description	Annual License Fees (USD)
Domestic (City to city) Courier License	Operates from one city/town to another, for example Kampala to Gulu, Kampala to Mbarara	400
Domestic (National) Courier License	Operates within the entire Uganda	1,000
Regional Courier License	Operates in the East African Region (Uganda, Kenya, Tanzania, Rwanda, Burundi and South Sudan)	2,500
International Courier License	Operates internationally with both worldwide and domestic networks.	5,000
Postal-Reserved National Operator	Charged with the responsibility of ensuring provision of universal postal services as the universal service obligation (US) and has the widest international and domestic coverage.	50,000

Figure 41   Infrastructure and coverage

	Fleet	SPOs (Sub Postal Offices)	DPOs (Departmental Post Offices)	Drop off and Pick up Points
2023	1,303	48	48	264
2022	876	48	48	264
2021	832	50	49	198
2020	578	272	48	156

Fleet

In 2023, post and courier fleet increased to 1,303 automobiles, up from 578 automobiles in 2020.

In addition to improved delivery speed, a larger fleet enables operators to handle higher volumes of packages and cover larger geographical areas, reaching new markets and increasing market share.

Figure 42 **Fleet**

Year	Value
2020	578
2021	832
2022	876
2023	1303

Drop-off and Pick-up Points

The number of drop-off and pick-up points has increased to 264 in 2023 from 156 in 2020.

More pick and drop-off points make it easier for customers to send and receive parcels, increasing accessibility and convenience.
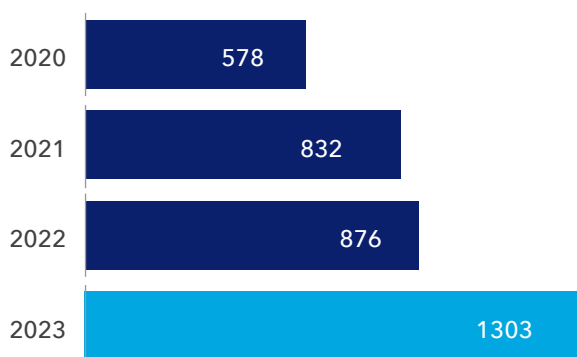
Figure 43 **Number of drop-off and pick-up points**

Year	Value
2020	156
2021	198
2022	264
2023	264

Service Usage and Traffic

Digitalising the Post Office: ePosta

In a bid to promote the use of postal services, the Government of Uganda (GOU) through the Uganda Registration Services Bureau (URSB) requires all companies seeking registration in Uganda to acquire a mail address.

In 2021, Posta Uganda partnered with CITZ Technologies to develop a digital addressing system known as ePosta.

ePosta services has significantly grown from 8,541 in 2021 to 54,105 in 2023 , increasing access & usage of postal services.

Figure 44 e-addresss

8,541
15,856
54,105

■ 2023 ■ 2022 ■ 2021
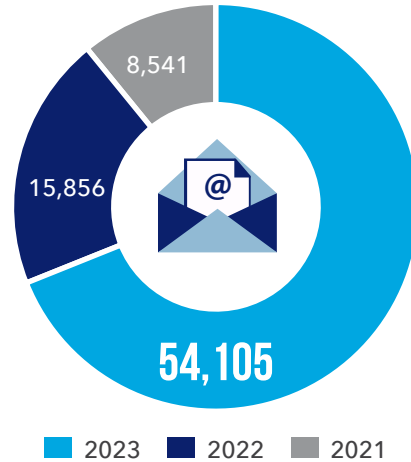
DID YOU KNOW?

That you can now obtain an eBox number from Posta Uganda? The eBox number is a unique identifier for your virtual post office box. When you receive mail, it is directed to your eBox using your eBox number, and you are notified via sms or email. You can then choose to collect your mail from a designated post office or have it delivered to your physical address.

Domestic Mails Traffic

Domestic mail volumes rose to 724,415 mails in 2023 from 352,056 mails in 2021. This growth was mainly driven by changes in consumer behaviour and business practises influenced by the COVID-19 pandemic which accelerated the shift to online shopping as consumers avoided in-person retail to reduce exposure.

678,365
352,056
724,415

■ 2023 ■ 2022 ■ 2021

East Africa Mails Traffic

In 2023, the post and courier market witnessed an increase in mail volumes received from East African Countries of Kenya, Rwanda, Tanzania, Burundi, and South Sudan.

Inbound mail volumes from East African Countries to Uganda grew by 20%, reaching 15,943 mails by the close of December 2023, compared to the 13,244 mails in 2021. Outbound mail volume increased from 6409 in 2022 to 6,725 in 2023.

East Africa Inbound Mails

15,943
Mails

East Africa Outbound Mails

6,725
Mails
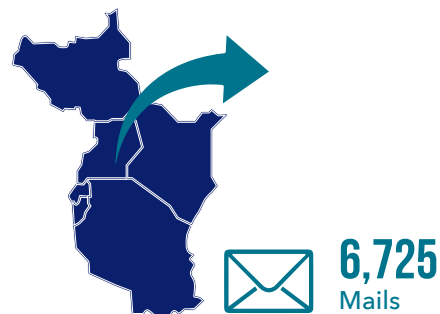
International Mails Traffic

International Incoming Mails

The international incoming mail volumes rose to 373,762 mails in 2023 from 175,684 mails in 2021. This is driven by the growth of e-commerce.

Year	Mails
2023	373,762
2022	252,331
2021	175,684

International Outgoing Mails

Outgoing traffic for international mail grew by 50% between 2021 and 2023 from 133,308 to 200,531 mails respectively.

This growth is attributed to Uganda's increasing participation in cross-border trade especially by small and medium enterprises.

50% Growth

133,308
200,531
358,174

2021　2022　2023
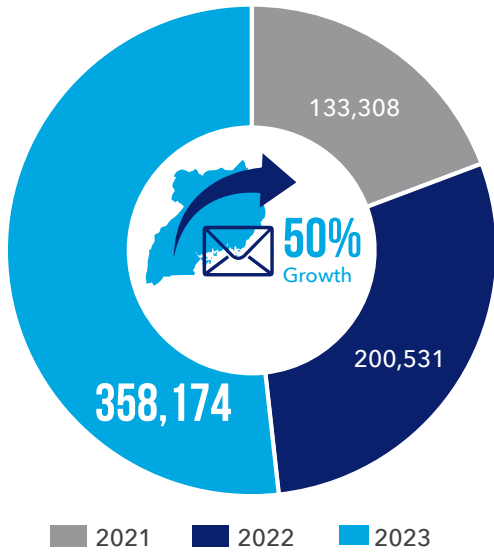
Expedited Mail Service (EMS) Traffic

Expedited Mail Service has seen steady growth, recovering from a dip in 2022. This was mainly due to the Covid pandemic when most airlines were grounded.

As a priority service, EMS traffic doubled from 3,184 mails in 2022 to 8,448 in 2023, driven by e-commerce packages that customers prioritize for personal use

Year	Value
2023	8,448
2022	3,184
2021	5,167
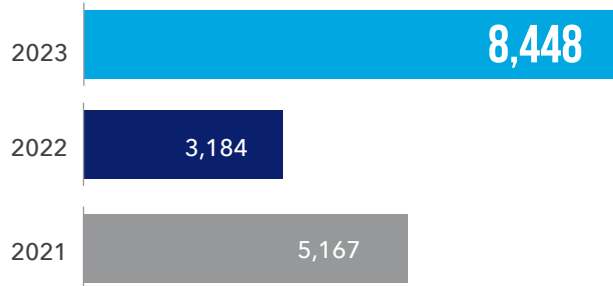
Postal and Courier Tariffs

INTERNATIONAL DELIVERIES							
	Uganda Post Limited (UPL) / Posta Uganda *	Uganda Post Limited / Posta Uganda (Express Mail Service - EMS) *	Skynet Worldwide Express Ltd	World Wide logistics (EHS-Licensee of FEDEX)	DAKS Courier Ltd	DHL International	Aramex Uganda Ltd
	Posta	EMS	SKYNET	EHS	DAKS	DHL	aramex
Weight	500gms	500gms	500gms	500gms	500gms	500gms	500gms
Delivery Countries (Top 20)	UGX	UGX	UGX	UGX	UGX	UGX	UGX
Australia	9,665	146,000	227,000	147,209	601,000	594,800	140,267
Canada	8,957	146,000	227,000	151,062	403,000	399,500	143,930
China	8,088	146,000	224,000	135,901	601,000	594,800	122,803
Democratic Republic of Congo	8,088	96,500	192,000	196,949	634,000	284,050	121,101
Egypt	8,088	96,500	192,000	196,949	487,000	506,000	99,382
Ethiopia	8,088	96,500	184,000	196,949	282,000	195,300	123,173
Ghana	8,088	96,500	224,000	196,949	487,000	284,050	150,664
India	8,957	146,000	184,000	111,253	487,000	594,800	107,078
Nigeria	8,957	96,500	195,000	196,949	487,000	284,050	144,670
Qatar	8,088	146,000	170,000	125,991	681,000	506,000	97,939
South Africa	8,957	96,500	170,000	196,949	282,000	284,050	98,568
Sweden	9,665	146,000	195,000	124,340	487,000	372,850	178,525
United Arab Emirates (UAE)	8,088	103,000	137,000	116,145	487,000	506,000	88,060
United Kingdom (UK)	8,088	103,000	170,000	119,321	255,000	293,000	N/A
United States of America	8,957	146,000	227,000	118,622	403,000	399,500	222,037
Zimbabwe	8,957	96,500	218,000	196,949	282,000	284,050	120,398
Germany	7,543	103,000	236,000	116,145	487,000	506,000	118,215
Saudi Arabia	8,957	146,000	218,000	119,321	255,000	293,000	136,826
France	8,957	146,000	236,000	118,622	403,000	399,500	93,943
Turkey	9,665	103,000	236,000	196,949	282,000	284,050	131,461

Uganda Post Limited / Posta Uganda delivers parcels to the Post Office. Courier Licensees: deliver up to the final recipient / customer (Last Mile Delivery)

REGIONAL DELIVERIES							
	UPL /Posta Uganda (Ordinary Letters)	UPL /Posta Uganda (EMS)	Monitor Publications Ltd/Nation Couriers	Skynet Worldwide Express Ltd	World Wide logistics (EHS-Licensee of FEDEX)	DAKS Courier Ltd	DHL International-(Documents)	Aramex Uganda Ltd
	Posta	EMS	NATION COURIER	SKYNET	EHS	DAKS	DHL	aramex
Weight	500gms	500gms	500gms	500gms	500gms	500gms	500gms	500gms
Delivery Countries	UGX	UGX	UGX	UGX	UGX	UGX	UGX	UGX
Burundi	57,588	86,900	N/A	170,000	196,949	282,000	195,300	239,650
Kenya	57,043	86,900	30,000	45,000	196,949	202,000	195,300	239,650
Rwanda	57,043	86,900	N/A	137,000	196,949	202,000	195,300	239,650
South Sudan	57,888	96,500	N/A	224,000	196,949	N/A	284,050	319,600
Tanzania	57,043	86,900	N/A	50,000	196,949	202,000	195,300	239,650

DOMESTIC DELIVERIES									
Licensees	NewTimes Express- (DHL Domestic)	Uganda Post Limited/ Posta Uganda (EMS)	Skynet Worldwide Express Ltd	Speedaf Logistics Uganda Ltd	Monitor Publications Ltd/Nation Couriers	MauMau Logistics Ltd	Exodus Couriers Ltd	WBPF Consultants Limited/ CourieMate	Makizto Courier and Logistics Ltd	Hygiene Couriers Ltd
	NTE	EMS	SKYNET WORLDWIDE EXPRESS	Speedaf express	NATION COURIER	MML	Exodus Couriers	COURIEMATE	Makizto.	HYGIENE COURIER
Delivery points	500gms	500gms	500gms	500gms	500gms	500gms	500gms	500gms	500gms	500gms
Alebtong	24,000	15,000	35,000	N/A	25,000	18,000	20,000	24,000	36,000	35,000
Arua	24,000	12,500	25,000	16,000	15,000	18,000	20,000	24,000	19,200	15,000
Bombo	14,250	7,500	25,000	N/A	12,000	10,000	15,000	18,000	15,000	20,000
Bukedea	18,000	15,000	25,000	N/A	15,000	16,000	15,000	21,000	36,000	20,000
Bundibujo	24,000	15,000	35,000	N/A	25,000	18,000	20,000	24,000	42,000	30,000
Bushenyi	24,000	12,500	25,000	N/A	15,000	18,000	20,000	24,000	19,200	15,000
Entebbe	7,500	5,000	10,000	8,000	10,000	8,000	9,000	12,000	12,000	12,000
Fortportal	24,000	12,500	25,000	14,000	12,000	18,000	15,000	18,000	16,000	15,000
Gulu	24,000	7,500	25,000	14,000	12,000	18,000	20,000	21,000	19,200	15,000
Hoima	18,000	12,500	25,000	14,000	12,000	14,000	15,000	21,000	16,000	15,000
Iganga	18,000	7,500	25,000	10,000	12,000	14,000	15,000	18,000	18,000	15,000
Ishaka	24,000	15,000	25,000	N/A	15,000	18,000	20,000	24,000	19,200	25,000
Jinja	14,250	7,500	15,000	10,000	10,000	10,000	10,000	15,000	18,000	15,000
Kabale	24,000	7,500	25,000	16,000	15,000	18,000	20,000	21,000	24,000	15,000
Kabwohe	24,000	12,500	30,000	N/A	15,000	18,000	20,000	24,000	36,000	30,000
Kakumiro	18,000	15,000	25,000	N/A	25,000	16,000	15,000	21,000	16,000	20,000
Kalangala	24,000	15,000	35,000	N/A	30,000	18,000	30,000	27,000	36,000	75,000
Kampala (CBD)	7,500	5,000	4,500	5,000	5,000	5,000	5,000	6,000	7,200	8,000
Kanungu	24,000	15,000	35,000	N/A	25,000	18,000	20,000	24,000	42,000	25,000
Kasese	24,000	N/A	25,000	16,000	15,000	18,000	20,000	21,000	24,000	20,000
Kayunga	18,000	12,500	15,000	8,000	12,000	14,000	9,000	18,000	19,200	15,000
Koboko	24,000	15,000	35,000	N/A	20,000	18,000	20,000	27,000	42,000	25,000
Kotido	24,000	N/A	35,000	N/A	25,000	18,000	20,000	24,000	36,000	35,000
Kyenjojo	18,000	12,500	25,000	14,000	12,000	18,000	15,000	21,000	25,000	15,000
Lira	24,000	7,500	25,000	14,000	12,000	18,000	20,000	18,000	19,200	15,000
Lugazi	14,250	7,500	15,000	8,000	10,000	10,000	9,000	18,000	18,000	12,000
Luwero	14,250	7,500	25,000	N/A	10,000	10,000	15,000	18,000	16,000	20,000
Lyantonde	24,000	15,000	25,000	N/A	12,000	14,000	20,000	18,000	30,000	15,000
Masaka	14,250	7,500	25,000	10,000	10,000	10,000	15,000	18,000	19,200	15,000
Mbale	18,000	7,500	25,000	12,000	12,000	16,000	15,000	18,000	19,200	15,000
Mbarara	24,000	7,500	25,000	14,000	12,000	16,000	20,000	18,000	19,200	15,000
Mityana	14,250	12,500	25,000	N/A	10,000	16,000	15,000	18,000	16,000	12,000
Moroto	24,000	15,000	35,000	N/A	25,000	18,000	30,000	24,000	42,000	40,000
Mpigi	14,250	7,500	15,000	N/A	10,000	10,000	10,000	18,000	18,000	12,000
Mukono	14,250	5,000	8,000	8,000	10,000	8,000	9,000	9,000	12,000	10,000
Nakapiripirit	24,000	15,000	35,000	N/A	25,000	18,000	20,000	24,000	30,000	45,000
Nebbi	24,000	15,000	25,000	N/A	12,000	18,000	20,000	18,000	36,000	25,000
Ntungamo	24,000	7,500	25,000	16,000	12,000	18,000	20,000	21,000	19,200	15,000
Pallisa	24,000	15,000	25,000	N/A	15,000	18,000	15,000	21,000	30,000	20,000
Rakai	24,000	12,500	25,000	N/A	12,000	16,000	20,000	21,000	36,000	50,000
Soroti	18,000	7,500	25,000	14,000	10,000	18,000	15,000	18,000	19,200	15,000
Wakiso	14,250	5,000	10,000	8,000	10,000	8,000	9,000	9,000	12,000	10,000

DOMESTIC DELIVERIES										
Licensees	**Hesed Holdings Ltd**	**SM-Cathan Logistics**	**Big Orange (SGA)**	**T.N.T Deliveries**	**Sail Corp Global**	**Patmos Investments**	**Aramex Domestic Rates**	**Godspeed Logistics Ltd**	**NGS- Yellow Bird**	**Link Bus Couriers Ltd**	**Mewa Excel Courier Services Ltd**
Delivery points	**500gms**	**500gms**	**500gms**	**500gms**	**500gms**	**500gms**	**500gms**	**500gms**	**500gms**	**500gms**	**500gms**
Alebtong	30,600	N/A	N/A	40,000	8,000	47,200	80,535	53,100	9,400	N/A	N/A
Arua	25,500	36,000	18,000	26,000	11,000	47,200	18,585	53,100	9,400	N/A	N/A
Bombo	N/A	12,500	N/A	20,000	9,000	23,600	18,585	17,700	8,600	N/A	N/A
Bukedea	30,600	N/A	N/A	35,000	10,500	41,300	37,170	41,300	9,400	N/A	N/A
Bundibujo	30,600	36,000	N/A	35,000	13,000	35,000	29,736	53,100	9,400	N/A	N/A
Bushenyi	25,500	36,000	N/A	20,000	13,000	35,000	18,585	53,100	9,400	N/A	N/A
Entebbe	10,200	12,500	12,000	9,500	5,000	17,700	12,390	17,700	5,300	N/A	N/A
Fortportal	25,500	23,000	N/A	26,000	11,000	23,600	18,585	53,100	9,400	13,000	N/A
Gulu	25,500	36,000	18,000	20,000	11,500	41,300	18,585	53,100	9,400	N/A	5,000
Hoima	25,500	36,000	N/A	30,000	13,000	23,600	18,585	41,300	9,400	13,000	N/A
Iganga	25,500	36,000	N/A	20,000	9,500	35,000	18,585	25,960	8,600	N/A	N/A
Ishaka	N/A	N/A	N/A	20,000	8,000	35,000	18,585	53,100	9,400	N/A	N/A
Jinja	20,400	18,000	12,000	13,000	9,000	17,700	18,585	17,700	8,600	N/A	N/A
Kabale	25,500	36,000	24,000	30,000	12,000	35,000	22,302	53,100	9,400	N/A	N/A
Kabwohe	N/A	N/A	N/A	20,000	12,000	35,000	37,170	53,100	9,400	N/A	N/A
Kakumiro	N/A	N/A	N/A	40,000	11,000	23,600	18,585	41,300	9,400	N/A	N/A
Kalangala	30,600	36,000	N/A	35,000	13,000	N/A	80,535	53,100	9,400	N/A	N/A
Kampala (CBD)	5,100	3,500	12,000	5,000	3,000	9,440	6,195	5,900	3,300	N/A	5,000
Kanungu	30,600	N/A	N/A	35,000	12,000	35,000	37,170	41,300	9,400	N/A	N/A
Kasese	25,500	32,000	N/A	26,000	9,000	35,000	18,585	41,300	9,400	13,000	N/A
Kayunga	25,500	18,000	N/A	20,000	7,000	17,700	18,585	17,700	5,300	N/A	N/A
Koboko	30,600	N/A	N/A	35,000	12,000	47,200	22,302	53,100	9,400	N/A	N/A
Kotido	30,600	36,000	N/A	40,000	9,000	47,200	44,604	53,100	9,400	N/A	N/A
Kyenjojo	30,600	28,000	N/A	40,000	9,500	23,600	22,302	25,960	9,400	13,000	N/A
Lira	25,500	36,000	18,000	26,000	12,000	41,300	18,585	53,100	9,400	N/A	N/A
Lugazi	N/A	12,500	N/A	20,000	8,000	17,700	18,585	17,700	5,300	N/A	N/A
Luwero	25,500	18,000	N/A	26,000	9,500	23,600	18,585	25,960	8,600	N/A	N/A
Lyantonde	25,500	32,000	N/A	30,000	12,000	23,600	18,585	41,300	9,400	N/A	N/A
Masaka	25,500	18,000	14,400	26,000	11,000	23,600	18,585	25,960	9,400	N/A	N/A
Mbale	25,500	23,000	13,800	20,000	9,500	35,000	18,585	25,960	8,600	N/A	N/A
Mbarara	25,500	23,000	18,000	20,000	13,000	35,000	18,585	25,960	9,400	N/A	N/A
Mityana	25,500	18,000	N/A	20,000	10,000	23,600	18,585	25,960	8,600	N/A	N/A
Moroto	30,600	36,000	N/A	40,000	13,000	53,100	80,535	53,100	9,400	N/A	N/A
Mpigi	25,500	18,000	N/A	20,000	10,000	23,600	18,585	17,700	8,600	N/A	N/A
Mukono	10,200	8,000	12,000	9,500	6,000	17,700	12,390	10,030	5,300	N/A	N/A
Nakapiripirit	30,600	N/A	N/A	40,000	N/A	53,100	80,535	53,100	9,400	N/A	N/A
Nebbi	30,600	36,000	N/A	35,000	12,000	47,200	18,585	53,100	9,400	N/A	N/A
Ntungamo	25,500	36,000	N/A	30,000	13,000	35,000	22,302	53,100	9,400	N/A	N/A
Pallisa	25,500	32,000	N/A	30,000	11,000	41,300	22,302	41,300	9,400	N/A	N/A
Rakai	30,600	N/A	N/A	30,000	9,500	23,600	22,302	53,100	9,400	N/A	N/A
Soroti	30,600	36,000	18,000	30,000	11,000	41,300	18,585	41,300	9,400	N/A	N/A
Wakiso	20,400	18,000	18,000	9,500	4,000	17,700	12,390	10,030	5,300	N/A	N/A

DOMESTIC DELIVERIES (CTD)

Licensees	Minuteman Delivery Services	Mitchell Cotts	Hoouna Logistics SMC Ltd	Kwanza Logistics	Vuka Africa Ltd	NFT Mobility	Kizkin Logistics	Boxleo Courier Ltd	Global Packaging Services	Kakise Holdings Ltd
Delivery points	500gms	500gms	500gms	500gms	500gms	500gms	500gms	500gms	500gms	500gms
Arua	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Entebbe	53,000	7,000	5,000	10,000	4,680	4,000	17,500	13,730	N/A	N/A
Kampala (CBD)	7,000	5,000	2,500	5,000	2,952	4,000	2,100	8,238	5,000	5,000
Mbale	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	5,000
Mbarara	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	5000	N/A
Mukono	25,000	7,000	5,000	10,000	4,680	4,000	14,000	N/A	N/A	N/A
Soroti	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	5,000
Wakiso	20,000	7,000	3,000	10,000	4,680	4,000	7,000	13,730	N/A	N/A

Licensees	Starline Transport Comapy Ltd	Y.Y Coaches Ltd	Dafric Logistics	Nile star Trade Link
	ST	Y.Y. Coaches	DAFRIC	NILESTAR
Delivery points	500gms	500gms	500gms	500gms
Arua	5,000	N/A	N/A	N/A
Kampala (CBD)	5,000	5,000	10,500	5,000
Koboko	5,000	N/A	N/A	N/A

Licensee	Zawadi Services Ltd
	ZAWADI
Delivery points	500gms
Arua	5,000
Gulu	5,000
Kampala (CBD)	5,000
Koboko	5,000
Lira	5,000
Nebbi	5,000

Note: The delivery price for 500 gms parcels applies to 1 Kg parcels across most destinations.

DID YOU KNOW?

LICENSED COURIERS:

👉 are regulated and adhere to industry standards, ensuring your packages are handled securely and delivered on time.

👉 have tracking services that allow you to monitor your shipment's progress and ensure accountability for its delivery.

LICENSED
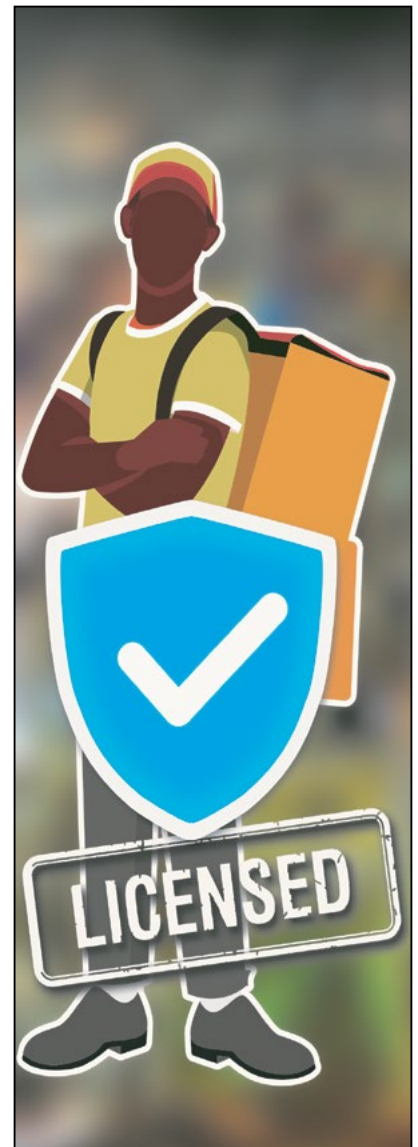
World Post Day

World Post Day is celebrated annually on 9 October. The event was declared by the 1969 Universal Postal Congress in Tokyo to mark the anniversary of the Universal Postal Union's (UPU) creation in 1874. The purpose of the celebration is to bring awareness to the role of posts in global social and economic development. UPU member countries always organise their own national activities to celebrate the event. In Uganda, the celebration coincides with the independence day celebrations. In 2023, UCC undertook a public sensitization activity on the role of the post and courier sector in social economic transformation to mark the World Post Day.

Sector Challenges

Informal Partnerships

Many operators lack formal service level agreements with third-party clients for last-mile delivery. This degrades customer experience.

To solve this, UCC continues to engage in public sensitisation on the advantages of formalising partnerships

Decline in Traditional Mail

Digital communication and e-commerce have reduced traditional letter-post volumes, straining the revenue collection of Posta Uganda.

Posta Uganda has introduced the eposta services to leverage the benefit of digital migration

Broadcasting

Broadcasting in Uganda dates back to 1954 when the colonial administration set up the Uganda Broadcasting Services that was later renamed Radio Uganda after independence in 1962. A year later, Uganda Television was established. For a long time, these two monopolized the broadcasting landscape until the liberalization of the communications sector in the 1990s. This transformed broadcasting to a diverse landscape. In its most basic, broadcasting encompasses both radio (audio/sound) and television (visual).

Broadcasting Services

Radio & Television Services

FM Radio Stations **264**

Region	Value
Eastern	47
Central	77
Western	82
Northern	58
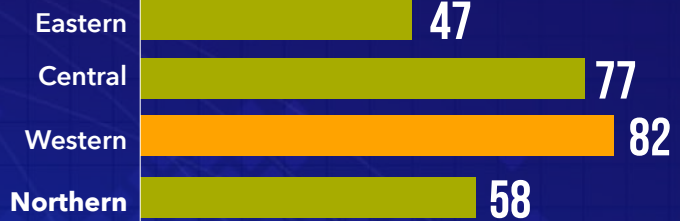
Infrastructure & Coverage

Satellite Coverage **146** Districts

Terrestrial Coverage **15** Districts

Cable Coverage **2** Districts

Free-To-Air Sites **18**

- Eastern **5**
- Western **5**
- Central **3**
- Northern **5**

Service Access

Pay TV Total Subscriptions **3.5M**

Active Subscriptions **1.6M**

High Value Bouquet Subscribers **148,313**

Low and Mid Value Bouquet Subscribers **1.4M**

Channels Carried

Total Channels **698**

Local Channels **62**

Foreign Channels **636**

Bouquet Revenue

Financial Performance **254B**

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FM Radio

In Uganda, Radio remains the most popular form of media. Its unparalleled reach connects communities and fosters shared experiences, in many cases filling gaps in hard to reach areas. As of December 2023, Uganda has 264 licensed radios. Demographically, this means that for every district are two active radios.

Radio distribution throughout the regions is relatively even. However, the Western Region accounts for the highest number of radio stations per region at 31%. The Eastern Region ranks least at 18%. The variance owes largely to differences in population demographics as well as geographical terrain.

Hilly and mountainous terrain requires more stations to cover the distance covered by a single station in relatively flat land. Also, densely populated areas may have more stations than sparsely populated areas.

Figure 45 Countrywide FM Radios Distribution

Eastern 18%
Central 29%
Western 31%
Northern 22%
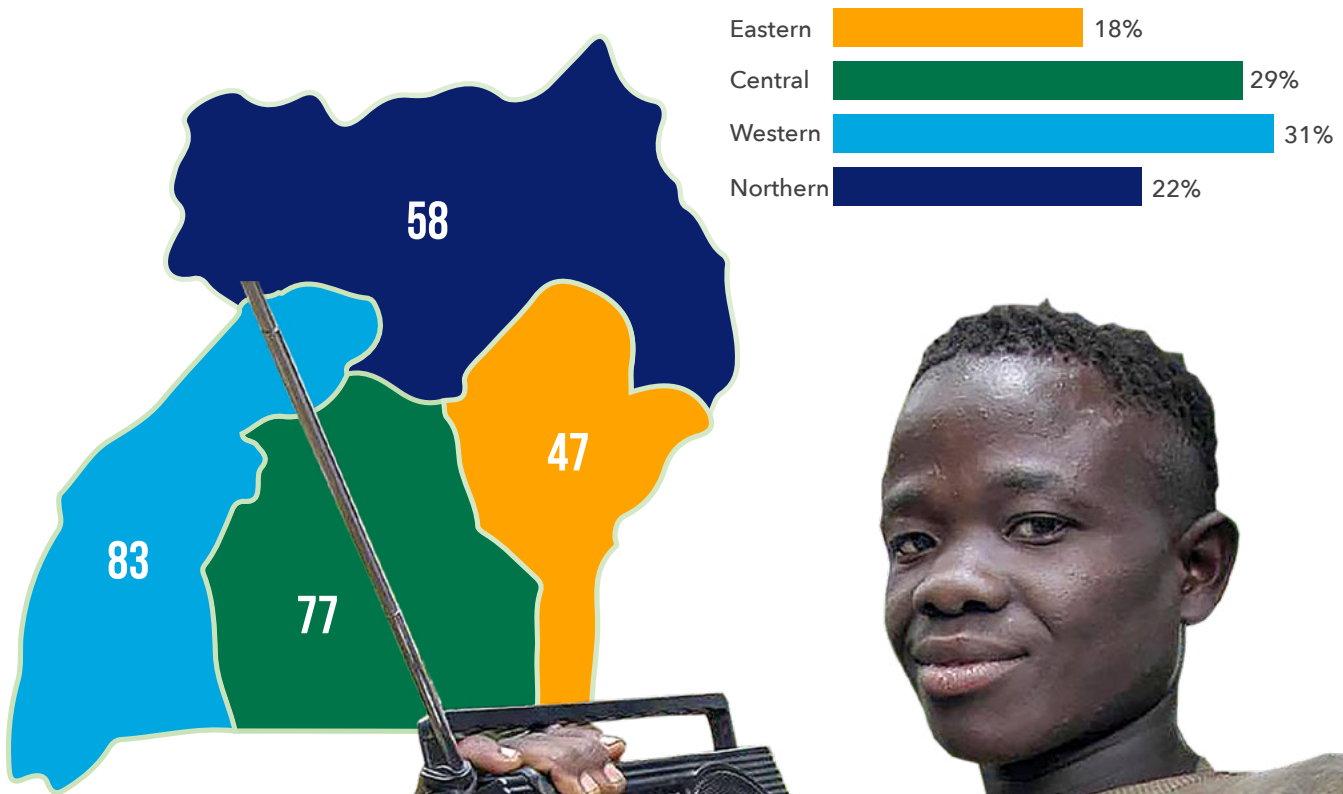
Digital Audio Broadcasting (DAB+)

Despite Uganda having a total of 264 licensed FM radios, spectrum which is the main channel of the service distribution for these radios is a finite resource.

In September 2023, UCC rolled out a one-year pilot project of the Digital Audio Broadcasting (DAB+) in Greater Kampala within an 80 km coverage radius. With up to eight streams in the pilot multiplex, the project features Star FM, Next Radio, KFM, XFM, Galaxy FM, and Green Radio.

DAB could mark a new era in radio broadcasting, almost as much as digital migration revolutionized television broadcast, for unlike traditional radio wave broadcast, digital audio broadcast allows for the provision of even more stations including both analogue and digital only stations. As such, DAB would free up more spectrum which then could be allocated to the improvement of other communications services.

In September 2023, UCC rolled out a one-year pilot project of the Digital Audio Broadcasting (DAB+) in Greater Kampala within an 80 km coverage radius

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Online Radio

Rather than spectrum, online radio relies on internet-based streaming technology for transmission. The approach offers both flexibility and accessibility further diversifying the broadcasting landscape.

In 2019, the Commission revised its licensing regime to suit the ever-growing demand for on-line radio services. As a result, online radio has become an important part of the broadcasting landscape of Uganda providing content that would otherwise be covered in traditional radio stations.

In 2019, the Commission revised its licensing regime to suit the ever-growing demand for on-line radio services

Television

Television broadcasting encompasses the delivery of video content via various delivery platforms, such as Terrestrial (ANTENNA), Satellite (DISH), Internet Protocol - IP, and Cable. Each platform offers unique opportunities and challenges, contributing to the dynamic broadcasting ecosystem.

Pay TV

In 2015, the Commission migrated the country from analogue to digital technology so as to improve access to quality broadcasting services across the country, effective use of the frequency spectrum, and to promote local content development. This led to the advent of pay TV for all citizens. Previously, pay TV was a status symbol for the wealthy.

Figure 46 Television Coverage

How Broadcasters in Uganda are Adapting to the Digital Revolution

Nuggets from Dr Innocent Nahabwe, Chairman, National Association of Broadcasters (NAB)

Dr Innocent Nahabwe is the chairman of the National Association of Broadcasters (NAB). NAB is the premier association for Radio, TV and online broadcasters in Uganda. The association exists to advance its members interests in government, the business sector and the country at large. We spoke to Dr Nahabwe to get the association's perspective on a number of issues that are critical to the broadcasting sector, particularly how the broadcasters are responding to the digital revolution.

On the current level of ICT application among broadcasters in Uganda…

It is quite broad. Every TV or radio station now has some ICT solution it uses in its running of business in some way. Most are streaming online, have social media channels on key platforms while some have applications to enable them reach out to online audiences. Of course, ICTs and particularly the Internet is heavily used in routine programming for preparation, content creation and broadcasting.

On how the application of ICT transformed the broadcasting landscape in Uganda…

ICT has greatly reduced the cost of doing business. You can't believe that less than 15 years ago, people would have to send a tape to Kampala via a bus after covering an event upcountry. OB vans were a huge truck with satellite links. Now, all you need for a live broadcast is a Live unit in a rucksack and internet connection. It has also broadened the reach for radio stations. Previously, radios were only limited to where the radio frequencies could reach. TVs also, were limited to where their terrestrial broadcasts could go. Not anymore. Now, the audience and viewership accessing TV or Radio via the internet channels is almost as big as that watching or listening off the traditional devices.

OB vans were a huge truck with satellite links. Now, all you need for a live broadcast is a Live unit in a rucksack and internet connection

Challenges broadcasters in Uganda face in implementing ICT solutions…

The cost of the internet remains high. This has limited the usage and reach. Also, the internet penetration is still limited. Many places have really bad internet speeds. If internet becomes widespread and gadgets become affordable, usage would definitely improve.

We also have a huge challenge of piracy where ownership of content is easily "stolen" by social media Vloggers. It hurts creativity and takes away the ability to fully commercialize the content. This is made worse because many platforms that would be paying content creators don't pay here. When Facebook, TikTok says they don't pay creators here for advertising, you wonder where we live. Those that pay have a very low rate for Uganda. It is a huge challenge .

While it is a free world for the customers, our concern as broadcasters is that we are regulated (pay license fees, pay taxes, adhere to content obligations) but have to compete in the same marketplace with these OTTs that have no similar regulatory, content and tax obligations. So, it is not a levelled field. Even in the case of pricing, while our pricing must be approved, they are free to charge what they want, as they want. This has contributed to the drop in subscription numbers for Pay TV.

On the decline of Pay TV subscriptions over the last four years. Why the decline and the implications? How are broadcasters responding to this phenomenon?

The subscription was mostly driven by the lack of a clear alternative way to watch TV. Besides football, most people in Uganda pay for Pay TV to watch local channels. The digital migration in Uganda did not achieve its intended goals. The national signal distributor, Signet, failed to deliver the signal across the country. Free to Air TV is only available in Greater Kampala. Even then, the picture quality is wanting. So, for people to watch TV, they must pay for TV. This would ordinarily increase Pay TV subscription but with COVID 19 effects on the household expenditure, many households have never recovered. They weigh whether to buy bread or pay for TV. The choice is obvious. TVs have found alternatives by streaming via social media and other platforms. It is helping grow the reach. However, it is also costly because it requires the internet. Our hope is that with Signet introducing DTH soon, the issues of signal distribution will be reduced, and TV viewing will be on the rise again.

On broadcasters' response to the growth of online content streaming apps like Netflix (with 100,000 active subscribers in Uganda), Apple TV, Amazon Prime and others…

While competition helps to drive creativity, it is also true that the Ugandan broadcast space is crowded. As much as these streaming apps and platforms make it a lot easier, they are still too high end and do not have translated options(*enjogerere)*. The bulk of our market however is still local and it prefers local content. As TVs, we must do more to understand the market and create content that is relevant to them and indeed many broadcasters have production houses and are already investing heavily in local productions.

Pay TV Subscriptions

Total Pay TV subscriptions have generally fluctuated between 2019 and 2022 before registering the highest number in 2023 at 3.52 million. Active Pay TV subscriptions for the same period, however, have steadily been on the decline. The period between 2020 and 2021 saw a slight rise in active subscription but this dropped between 2021 and 2023 to the lowest record yet.

Figure 47 Total Pay TV Subscriptions

	Low and Mid Value Bouquet Subscribers	High Value Bouquet Subscribers
Percentage of Active Subscriptions (2023)	90%	10%
2023	1,406,145	148,313
Percentage of Active Subscriptions (2019)	92%	8%
2019	1,549,490	136,770
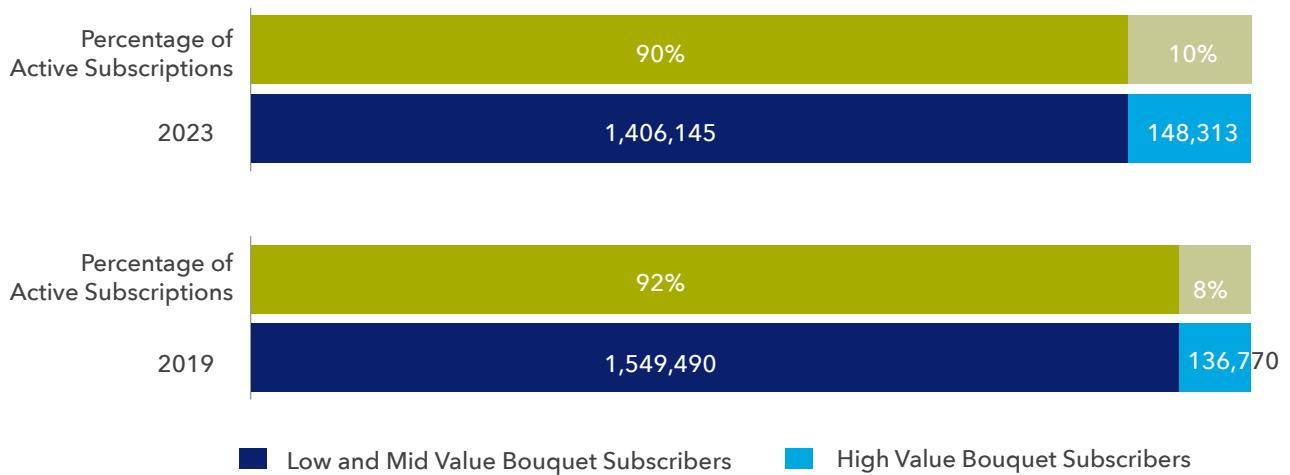
Figure 48 Active Pay TV Subscriptions (millions)

Year	Total Pay TV Subscribers	Active Pay TV Subscribers
2019	2.7	1.7
2020	3.0	1.6
2021	3.2	1.6
2022	3.0	1.6
2023	3.5	1.6
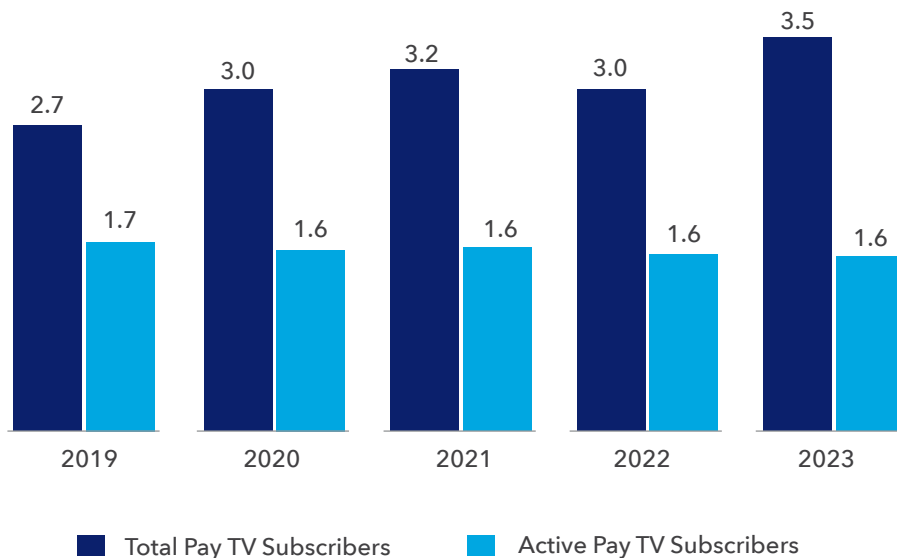
Free To Air (FTA)

Whereas the move from analogue to digital mode of television access presented certain benefits, it threatened to disenfranchise some customers who could not afford Pay TV broadcasting services. Under its mandate to protect the communication services customer, the Commission provided for the provision of Free-To-Air (FTA) broadcasting services. The Commission supported the installation of 18 Free-to-Air broadcasting sites across the country to ensure that no one is left behind in the digital migration.

SIGNET is the signal distributor of the Free-to-Air signal. It came into existence following a recommendation from the digital migration policy.

Figure 49 Content Carriage in Pay TV

Total Channels Carried

698 / 687

Foreign Channels Carried: 636 / 633

Local Channels Carried: 62 / 54

2023 / 2019

PARLIAMENT IN SESSION — UBC
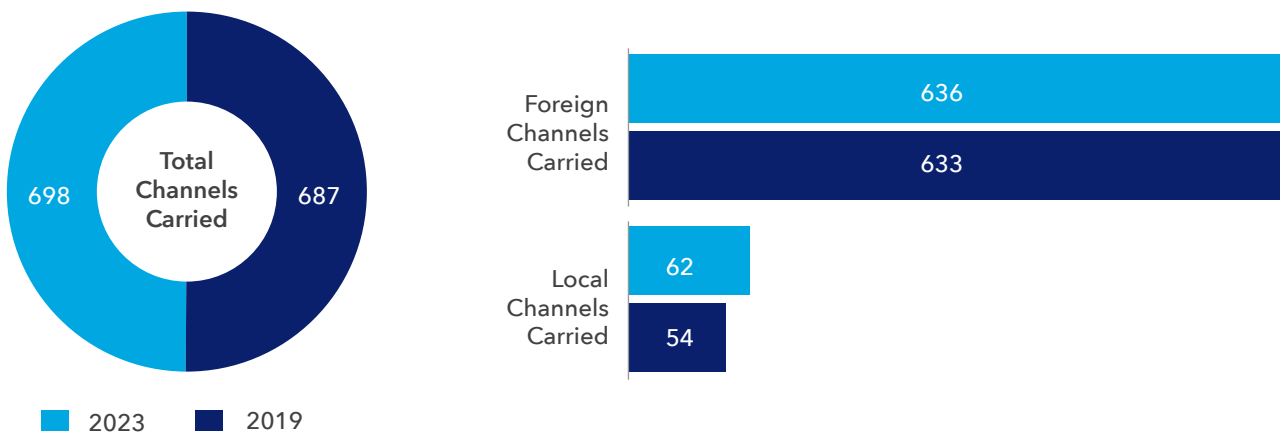
Tariffs and Pricing
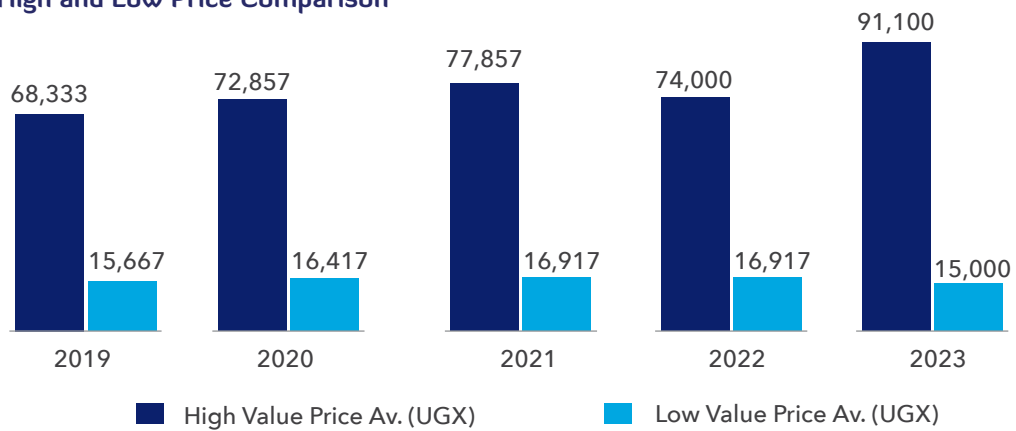
Figure 50 Pay TV Tariffs

	2019	2020	2021	2022	2023
GOTV					
GOTV MAX	39,000	40,000	42,000	40,000	49,000
GOTVVALUE	16,000	17,000	18,000	17,000	21,000
GOTV LITE	11,000	12,000	13,000	12,000	15,000
GOTV PLUS	26,000	27,000	29,000	27,000	33,000
GOTV SUPA			55,000		65,000
GOTV SUPA +					104,000
StarSat (Satellite)					
Nova	13,000	13,500	13,500	13,500	16,000
Smart	26,000	28,000	28,000	28,000	32,000
Super	54,000	54,000	54,000	54,000	54,000
Chinese	80,000				
Special					20,000
Smart Plus					42,000
StarTimes (Terrestrial)					
Basic	20,000	20,000	20,000	20,000	20,000
Classic	26,000	28,000	28,000	28,000	32,000
Nova	11,000	12,000	12,000	12,000	14,000
Copa					16,000
ZUKU TV					
Classic	26,500	26,500	26,500	26,500	26,500
Premium	36,500	36,500	36,500	36,500	36,500
AsiaStand Alone	39,000	35,000	35,000	35,000	42,700
Smart	12,000	12,000	12,000	12,000	12,000
Asiabuy through	35,000	39,000	39,000	39,000	42,700
Smart plus	16,000	16,000	16000	16,000	16000
Azam					
Azam Play	37,000	37,000	30,000	30,000	30,000
Azam Plus	25,000	25,000	23,000		
Azam pure	10,000	10,000	10,000	13,000	13,000
Play Bundle			45,000	45,000	45,000
DSTV					
Premium	219,000	227,000	239,000	227,000	275,000
Compact Plus	129,000	135,000	142,000	135,000	160,000
Compact	79,000	84,000	89,000	84,000	104,000
Family	49,000	52,000	55,000	52,000	64,000
Access	33,000	35,000	37,000	35,000	43,000
Lumba					16,000
SIMBA TV (Kampala Siti Cable)					
Asian Package		85,000	85000	85000	85000
Local Package		15,000	15000	15000	15000

Financial Performance

Figure 51 | **High and Low Price Comparison**

- High Value Price Av. (UGX)
- Low Value Price Av. (UGX)

Values by year:
- 2019: 68,333 / 15,667
- 2020: 72,857 / 16,417
- 2021: 77,857 / 16,917
- 2022: 74,000 / 16,917
- 2023: 91,100 / 15,000

Figure 52 | **Revenue Performance (UGX Billion)**

- 2023: 253.7
- 2022: 242.9
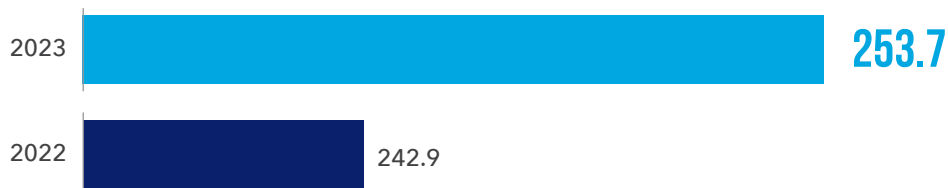
Film

Film is one of the most important communication avenues for fostering and instilling cultural and world views in the contemporary world. Yet for a long time, while many countries within the region registered success in the film arena, Uganda continued to lag behind. In 2013, the Commission identified key initiatives to stimulate the development of the Film industry, the most notable one being the Uganda Film Festival whose major aim is to celebrate and showcase Ugandan content.

Infrastructure

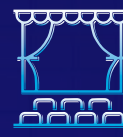| Production Houses	Film Associations	Video Halls*	Video Libraries*	Exhibitors	Major Cinemas (Exhibition Premises)	Theatres
1,213	143	474	858	07	05	06

Uganda Film Festival

Total Submissions	Ugandan Film Submission	Training Partners	Film Production Trainees
362	254	6	1,739

Content Development Support Programme

Total Submissions	TV Drama	Animation	Feature Films	Documentaries	Short Film
159	34	02	88	19	11

Audience Building and Viewership

Ugandan Film Productions Screened	Film Screening Attendees
45	2,934

Global Recognition

International Nominations	International Awards
63	24

*This data is from the Kampala Metropolitan area

Film Industry Infrastructure

As of 2023, Uganda has a total of 1,213 local production houses. These are supported by a total of 474 exhibitors. Exhibitors here include all facilities that show case films to the public. In Uganda, these include cinema houses, theatres, and video halls. The production houses are also supported by a total of 26 licensed distributors.

While the sector has a lot of potential, it largely struggles with a lot of informal nature of operations with most of the above listed being unlicensed. However some major cinemas and production houses have moved to the level of formalisation and are licensed.

The history of film in Uganda dates back as far as 1893. However, it was in the 1980s that it began to take root with productions of Obwavu Musolo by Kyeswa and the Thats Life Mwatu, and Bibaawo series by the Ebonies. In the 2000s, the Uganda film industry faced stiff competition as the market was flooded by Nigerian movies that started to show on Ugandan airwaves. The industry was largely driven by passion until UCC became the Regulator in 2013 after its merger with Broadcasting Council.

Uganda Film Festival

In 2023, the festival marked a decade of existence. Beyond just showcasing Ugandan films in cinemas, the festival includes training sessions for budding filmmakers. By equipping artists with filmmaking skills, the Commission ensures quality control in the productions, a lack of which had for long bedeviled the industry. This followed a directive by the Commission in 2013 requiring all free to air and pay TV licensees to respectively ensure that 70% and 20% of their content is local.


Evolution of Film Over the Years

Since the inception of the film festival, the number and nature of film submissions has evolved. In its inaugural year, the festival exclusively received submissions by Ugandan filmmakers. A decade down the road however, the submission landscape of the festival has changed considerably. As of 2023, the festival receives submission from filmmakers not only from the EA region but also from all over the world. Primarily this owes to the visibility and the reputation the festival is fast garnering.

Figure 53 **UFF submissions over the years**

■ Total UFF Submissions ■ Ugandan UFF Submissions ■ Foreign Submissions
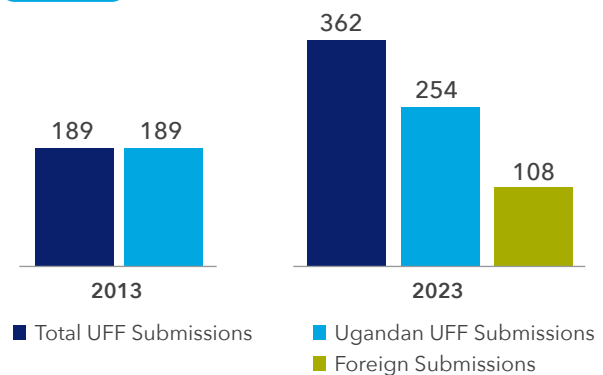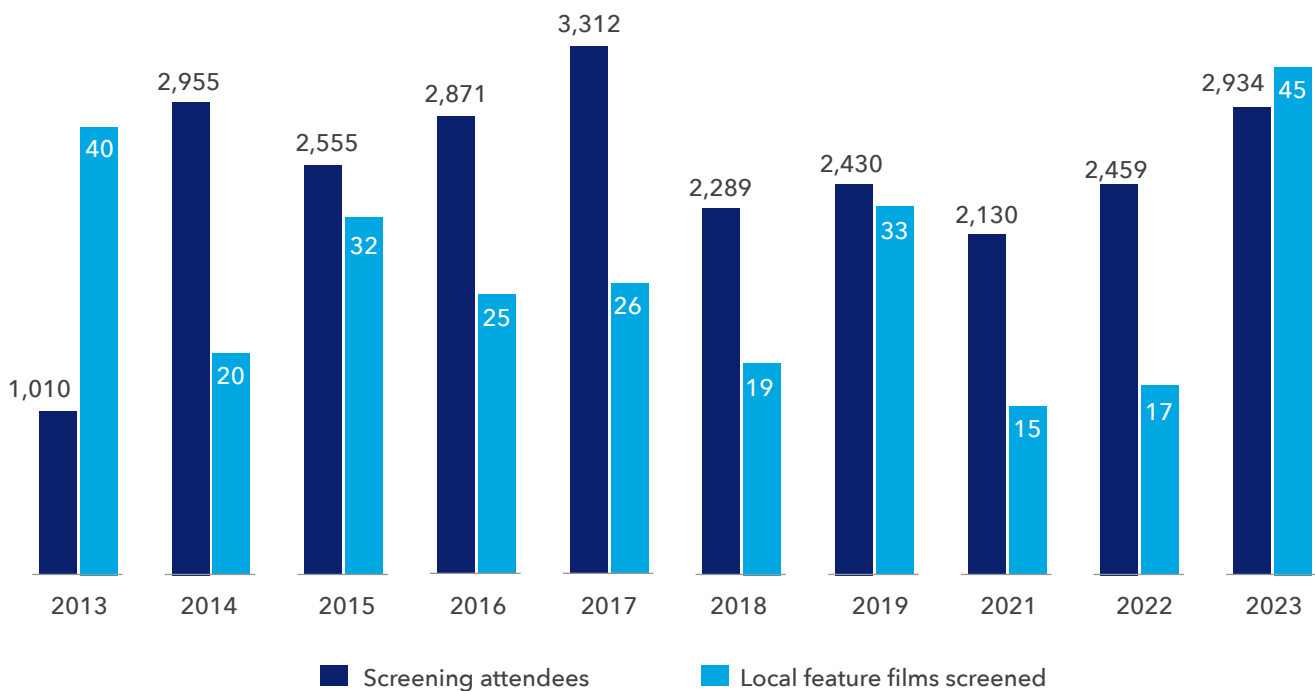
Figure 54 Film categories by submission counts
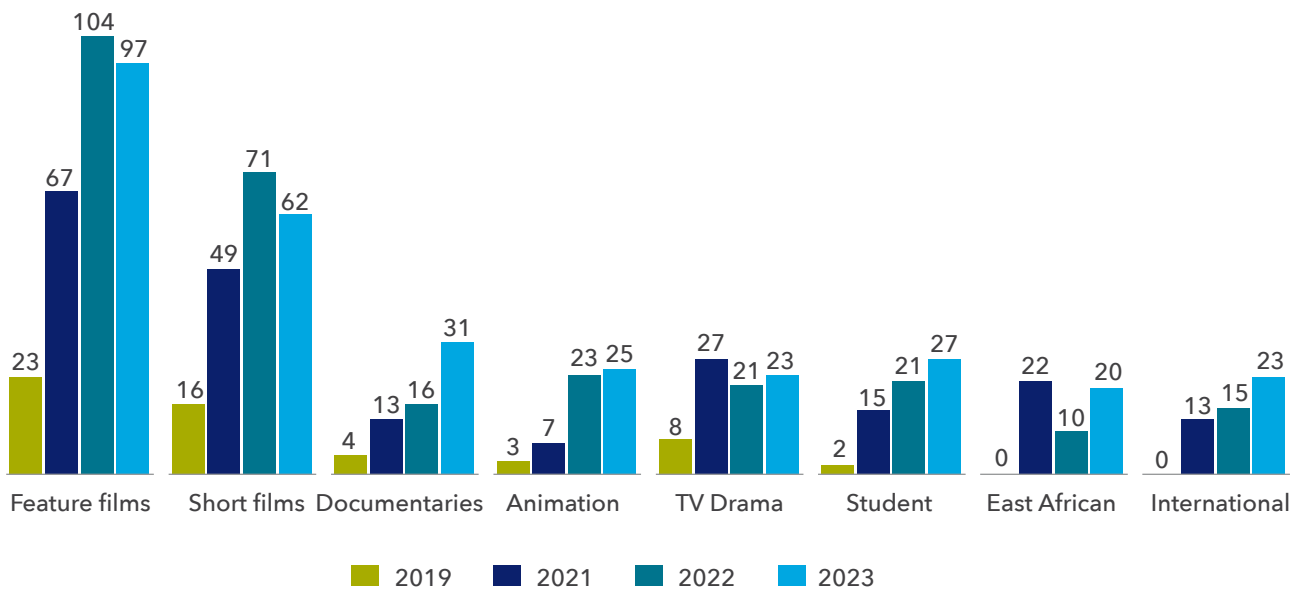
Feature films continue to be highest represented category of submitted films since 2019 and grew steadily to peak at 97 in 2022. Likewise, short film submissions grew steadily from 2019 to 62 in 2022.

Audience Building and Viewership of Film Over the Years

Figure 55 UFF Screening Viewership

Capacity Building and Skills Initiatives

One of the distinguishing features of the festival is the training program for budding filmmakers. In its decade of existence, the festival has skilled many Ugandans in the art of filmmaking.

Trainees Over The Years

The number of trainees has grown over the years. By 2023 the Commission had skilled a total of 6,898 film makers in different aspects of film.

Figure 56 Trainees Growth Over the Years

2013	2014	2015	2016	2017	2018	2019	2020	2022	2023
700	85	206	171	115	1,384	907	45	1,546	1,739
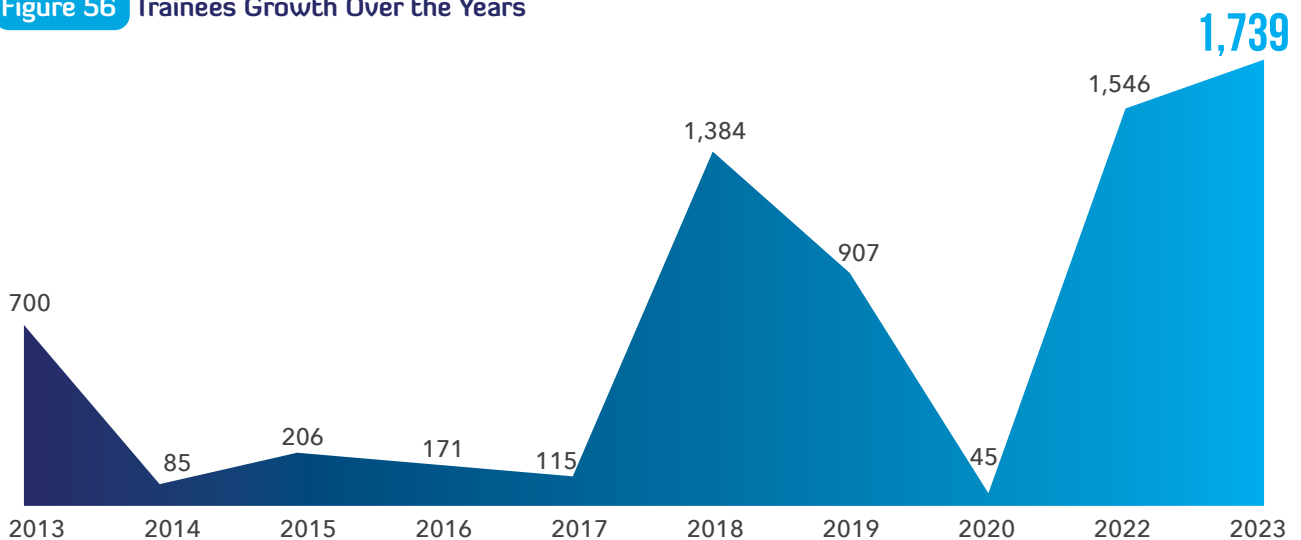
Training Partners

In its efforts to empower local film makers to compete in the global film market, the Commission has been supported by a number of partners.

Cinearts academy

Proline Film Academy

Crossroads Multimedia Limited

Kampala Film School

Media Vision Academy

Arts and Business Center

Content Development Support Programme

In 2020, the Commission prioritised support for development and production of local audio-visual content which promotes Ugandan identity and varied culture. Thus, the Content Development Support Programme (CDSP), was launched to provide both technical and financial support to Ugandan production companies and individuals to develop audio-visual content.

Figure 57 CDSP Submissions Growth
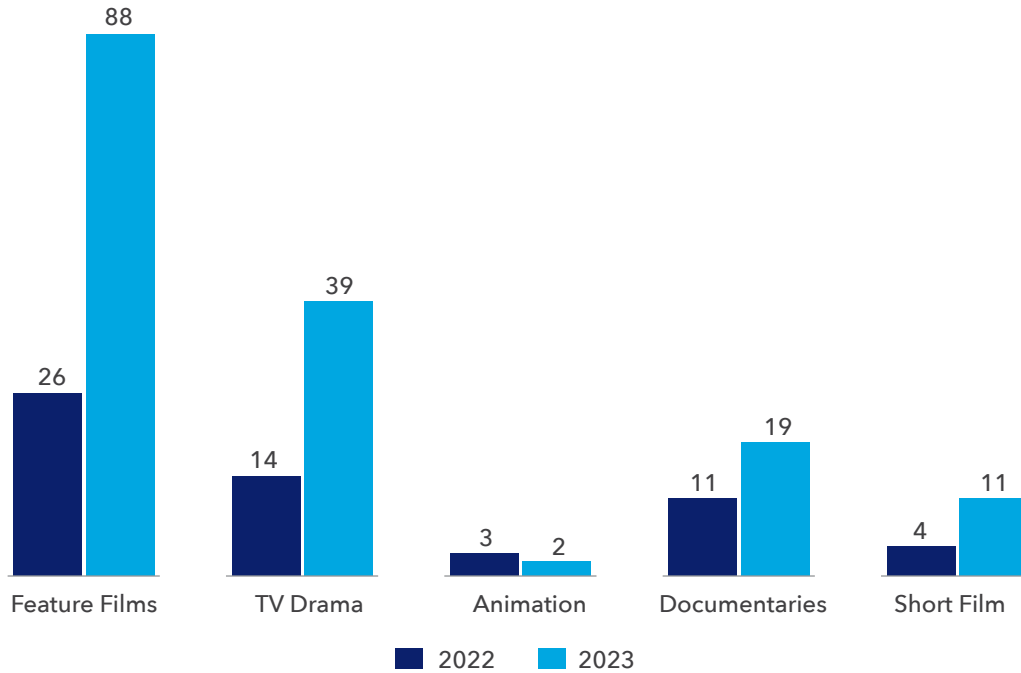
Of the projects submitted in its inaugural year, 26 were feature film, 14 television drama, 11 documentaries, four short films and three animations. The Commission approved funding for the execution of four of the proposals. These resulted in the production of *Karamoja* by Eleanor Vaal Nansibo Nabwiso, *Unheard* by Joseph Ken Ssebagada *Borders* by Ampire Daphine Karema and the animation, *Rachel's Old King*. In its sophomore year, the Commission, in acknowledgment of public buy-in into the program supported a total of 14 projects out of 161 submissions.
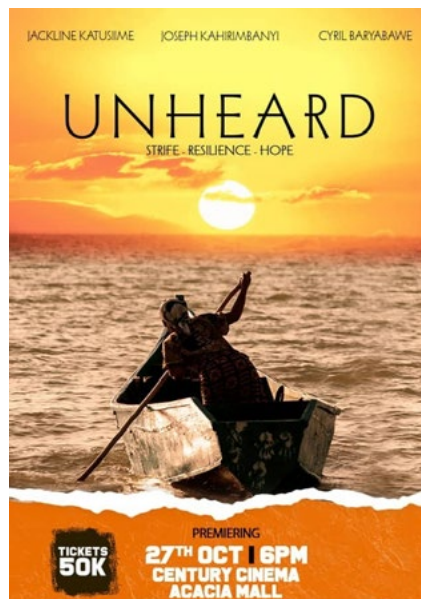
International Participations and Recognition of Local Content and Talent

Since inauguration of the Uganda Film Festival, many Ugandan films have received international awards. In 2013, Ugandan films received a total of three international awards nominations and returned home with one international award. By 2017, these had grown to 17 and 8 respectively. In 2023, these numbers tripled respectively to 63 international nominations and 24 international awards.

Figure 58 International Film Award Growth Progression

Bar chart data:
- 2023: International nominations 24, International awards 63
- 2017: International nominations 18, International awards 17
- 2013: International nominations 1, International awards 3

International nominations | International awards
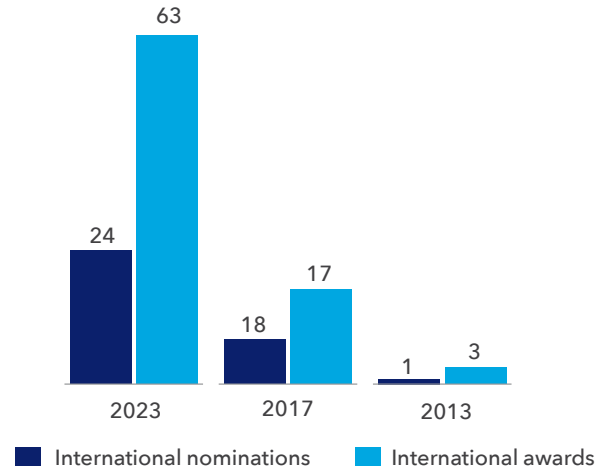
Tariffs and Pricing

Figure 59 Cinema Tariffs

Century Cinema Arena Mall-Nsambya							
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Normal	12,000/=	12,000/=	12,000/=	12,000/=	20,000/=	20,000/=	20,000/=
Loyalty	12,000/=	12,000/=	15,000/=	15,000/=	18,000/=	18,000/=	18,000/=
Kids	10,000/=	10,000/=	10,000/=	10,000/=	10,000/=	10,000/=	10,000/=
VIP	15,000/=	15,000/=	15,000/=	15,000/=	25,000/=	25,000/=	25,000/=

Century Cinema Metroplex Mall-Nalya							
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Normal	10,000/=	10,000/=	10,000/=	10,000/=	15,000/=	15,000/=	15,000/=
Loyalty	10,000/=	10,000/=	10,000/=	10,000/=	15,000/=	15,000/=	15,000/=
Kids	10,000/=	10,000/=	10,000/=	10,000/=	10,000/=	10,000/=	10,000/=

Century Cinema Acacia Mall-Kamwokya							
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Normal	12,000/=	17,000/=	17,000/=	14,000/=	22,000/=	22,000/=	22,000/=
Loyalty	12,000/=	15,000/=	15,000/=	14,000/=	20,000/=	20,000/=	20,000/=
Kids	10,000/=	10,000/=	10,000/=	10,000/=	10,000/=	10,000/=	10,000/=

Dolby Atmos- Acacia Mall-Kamwokya							
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Normal	13,000/=	17,000/=	18,000/=	15,000/=	24,000/=	24,000/=	24,000/=
Loyalty	13,000/=	15,000/=	16,000/=	15,000/=	22,000/=	22,000/=	22,000/=
Kids	10,000/=	10,000/=	10,000/=	10,000/=	10,000/=	10,000/=	10,000/=

| Ham Cinema-Wandegeya							
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
	10,000/=	10,000/=	10,000/=	7,000/=	15,000/=	15,000/=	15,000/=

Regional Film Competitions

After a decade of the Uganda Film Festival, it became apparent to the Commission that whereas significant and timely strides had been made in as far as improvement of quality of local film production was concerned, film was fast growing into a capital city affair. Given that the capital city is in the Central Region, this threatened to disenfranchise and marginalize other regions. To ensure that no one is left behind in the digital migration era, the Commission conceived of the Regional Film Competitions.

Whereas the competitions are part of the activities leading up to the Film Festival, they are intended to consolidate the gains of the festival at a regional level. Through the competitions, the Commission hopes to promote regional languages, cultures and scenery as well as diversity, build audiences as well linkages for local content.

Figure 60 **RFC Film Submissions Growth**

Region	2022	2023
Northern	10	50
Eastern	8	13
Central	9	41
Western	12	32
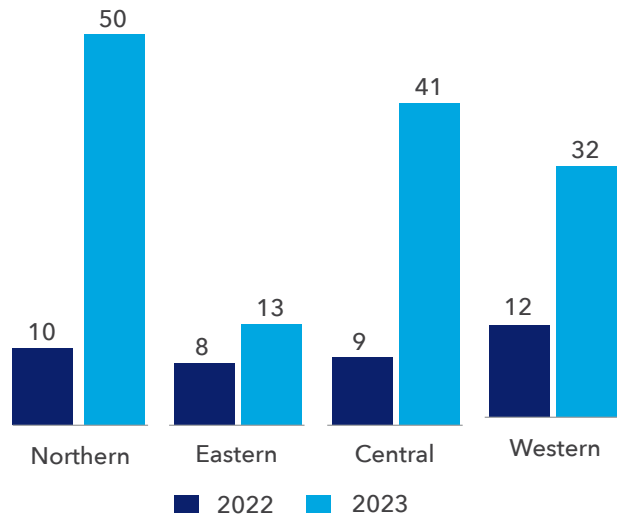
The increase in the number of submissions shows that more people are becoming aware of the relatively new intervention from the Commission and are embracing it.

Voices from the Film Fraternity

Mwebaza Martin

The Regional Film Competition plays a crucial role in highlighting the diversity of narratives within the country by providing a platform for storytellers from various backgrounds to showcase their perspectives, cultures, and experiences. It fosters inclusivity by encouraging filmmakers to explore a wide range of themes and subjects, thus reflecting the rich tapestry of the cultural landscapes of different regions.

Tayebwa Agnes

This competition is a recognition of our efforts. It will help us as a region to improve our storytelling techniques, and how to weave them into more compelling visual narratives.

Kizito Samuel Savior

One of the best things about the UCC CDSP II was its evaluation process. After submitting my project, I was called in to physically pitch my *The Wrong Bride* drama series.

I had to prove to the mentors and jurors that the project was artistically and commercially viable.

Rehema Nanfuka

My experience, so far, is that this is still an ongoing process. We have had good mentors who have helped with the story process. Their insights have enriched my craft. UCC has been most supportive in this.

Sector Challenges

Tax incentives

The sector requires incentives specific to film production which will attract international productions as well as promote our existing producers.

Funding

Whereas the Commission has introduced the CDSP, it is not enough to bridge all the required support the country and thus it still remains a big challenge in the sector

Distribution infrastructure

The sector has not developed into clear structures especially for the distribution of content which hinders the business aspect and development

Policy

Need for conducive policies to enable the film industry blossom

TOWARDS AN INCLUSIVE DIGITAL ECONOMY

KOMPARE

Kompare.ug is accredited by the Uganda Communications Commission to provide pricing and promotions information to enable consumers to compare the offers of different operators. This web portal helps to establish the current voice, internet and pay-TV prices in Uganda.
https://www.ucc.co.ug/apps-portals/kompare/.

NETQ–UG APP

The NetQ-UG App enables a user to measure the internet speed of their internet connection at a particular place and time. The app also helps the user to check how and for what their data bundle or subscription has been used. It also provides an insight into the quality of internet service experienced by other users in the same or other location through crowdsourcing.

UGCERT

The Computer Emergency Response Team was established in June 2013 in partnership with the International Telecommunications Union (ITU). UgCERT serves the communications sector, which includes licensed telecom service providers, Internet Service Providers, and consumers of their services.
https://www.ucc.co.ug/cert/

ESERVICES

Through our e-services portal, you can now apply for equipment type approval, short codes, Logical Channel Numbering, licenses for FM broadcasting, online data communication authorization, and Postal & Courier services.
Visit http://eservices.ucc.co.ug to sign up

UCIIEP UNDERGROUND COMMUNICATION INFRASTRUCTURE INFORMATION EXCHANGE PLATFORM

UCIIEP enables any entity (in or outside the communications sector) that is intending to carry out excavation or construction works within the vicinity of buried communication infrastructure to exchange information with the owners of the said infrastructure. This helps to protect communication infrastructure from damage during such works.

CONSUMER AFFAIRS

The Consumer Affairs office undertakes consumer awareness, education and protection activities. The overall goal of this unit is to position the consumer to play an active role in the development of the communications sector through consumer protection and awareness. For consumer-related inquiries, call our toll-free line: 0800222777.

DIAL *197*4#

Through our SIMU KLEAR campaign, consumers can verify the veracity of their devices by dialing ***197*4#**. Illegitimate communication devices have fake IMEI – International Mobile Equipment Identity – and are not type approved by UCC.

DIGITAL LOGGER

This is an electronic content monitoring system that helps in monitoring of content to enable the commission enforce compliance.

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