The information and figures contained herein were obtained from licensees’ submissions to the Commission and other sources available to the Commission. It is intended to provide the communications market overview to:

1. The industry,
2. Prospective entrants,
3. Government,
4. Academia and other stakeholders.

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Introduction

This is a review of the industry performance, trends and key developments for the quarter starting July to September 2021. The report covers:

1. Outlook of the Global Telecom Market Place
2. Uganda Highlights in the Telecom Industry
3. Service Access
4. Traffic and Usage
5. Industry Revenues
6. Post and Courier Services
7. Multimedia and Broadcasting Market
TikTok video-sharing app crosses the 1 Billion Customer Mark

As social media and microblogging applications continued to dominate global communication trends during the COVID-19 pandemic, Byte Dance-owned TikTok crossed the 1 billion monthly active user mark for the first time. This makes it only the second social media platform with more than a billion monthly active users, the other being Facebook and its associated sub platforms (WhatsApp and Instagram).

To the contrary, the quarter saw subdued growth of Clubhouse subscriptions following explosive growth in the preceding nine months. During the quarter, following several financing rounds, the application started providing more insights about potential new app additions such as Comedy shows, festivals and dating services, among others.
Disruptions in the Semi-Conductor Supply Chains

In the world of communication devices, the quarter witnessed global shortcomings in the production of semiconductor/chips in Asia largely attributed to the COVID-19 production slowdowns.

This disruption has not only impacted production in the mobile device world but also had extended effects on all IoT-driven sectors. The chip shortage impact has been felt across industries such as automotive and gaming. So significant have been these effects that automobile manufacturers such as Toyota, Ford, Volvo and Jaguar Land Rover reported slowdowns in production on account of chip shortages.

Apple, on the other hand, reported that its 4Q21 production targets would fall by as much as 10 million units

Semi Conductor Manufacturer Market Share by Revenue-Q2, 2021
In terms of device releases, the big news during the quarter was Apple’s dual release of its iPhone **13Pro** and **iPhone 13ProMax** at the end of September 2021. The models, with reported advancements in camera, battery life and speed, came in four colors.

### iPhone 13Pro
- **Announced:** Sept 14, 2021
- **Sim:** Single, Dual SIM (Nano)
- **Size:** 6.1 inches, 90.2 cm²
- **OS:** iOS 15, iOS 15.1
- **CPU:** Hexacore (2x3.22 GHz)
- **Mem:** 128, 256, 512GB, 1TB
- **RAM:** 6GB
- **Camera:** 12 MP, HDR
- **Battery:** Li-Ion 4352 mAh

**Features:** Face ID, gyroscope, Siri, proximity, compass, barometer, accelerometer,

### iPhone 13ProMax
- **Announced:** Sept 14, 2021
- **Sim:** Single, Dual SIM (Nano)
- **Size:** 6.7 inches, 109.8 cm²
- **OS:** iOS 15, iOS 15.1
- **CPU:** Hexacore (2x3.22 GHz)
- **Mem:** 128, 256, 512GB, 1TB
- **RAM:** 6GB
- **Camera:** 12 MP, HDR
- **Battery:** Li-Ion 3095 mAh

**Features:** Face ID, gyroscope, Siri, proximity, compass, barometer, accelerometer,

On the other hand, Chinese device giant, Xiaomi also released its Mi-11T handset model at the end of September. The model comes with a **5,000 mAh** battery, 67 W charging capability (with a potential to attain a full charge in 36 minutes) as well as enhanced camera, sound, and display capabilities.

### Mi-11T
- **Announced:** Sept 15, 2021
- **Sim:** Dual SIM (Nano)
- **Size:** 6.67 inches, 107.4 cm²
- **OS:** Android 11, MIUI 12.5
- **CPU:** Octa-core (1x3.0 GHz)
- **Mem:** 128, 256GB
- **RAM:** 8GB
- **Camera:** 108 MP, HDR
- **Battery:** Li-Po 5000 mAh

**Features:** Fingerprint (side), accelerometer, gyroscope, proximity, compass

The model comes with a 5,000 mAh battery, 67 W charging capability (with a potential to attain a full charge in 36 minutes) as well as enhanced camera, sound, and display capabilities.
Global Smartphone Shipments

<table>
<thead>
<tr>
<th>Company</th>
<th>2Q21 Shipment Volumes</th>
<th>2Q21 Market Share</th>
<th>Company</th>
<th>3Q21 Shipments</th>
<th>3Q21 Market Share</th>
<th>Change in Shipment Volumes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Samsung</td>
<td>59</td>
<td>18.80%</td>
<td>1. Samsung</td>
<td>69</td>
<td>20.80%</td>
<td>16.95%</td>
</tr>
<tr>
<td>2. Apple</td>
<td>44.2</td>
<td>14.10%</td>
<td>2. Apple</td>
<td>50.4</td>
<td>15.20%</td>
<td>14.03%</td>
</tr>
<tr>
<td>3. Xiaomi</td>
<td>53.1</td>
<td>16.90%</td>
<td>3. Xiaomi</td>
<td>44.3</td>
<td>13.40%</td>
<td>-16.57%</td>
</tr>
<tr>
<td>4. OPPO</td>
<td>32.8</td>
<td>10.50%</td>
<td>4. OPPO</td>
<td>33.2</td>
<td>10.00%</td>
<td>1.22%</td>
</tr>
<tr>
<td>5. Vivo</td>
<td>31.6</td>
<td>10.10%</td>
<td>5. Vivo</td>
<td>33.3</td>
<td>10.10%</td>
<td>5.38%</td>
</tr>
<tr>
<td>Others</td>
<td>92.4</td>
<td>29.50%</td>
<td>Others</td>
<td>101.1</td>
<td>30.50%</td>
<td>9.42%</td>
</tr>
<tr>
<td>TOTAL:</td>
<td>313.2</td>
<td>100.00%</td>
<td>TOTAL:</td>
<td>331.2</td>
<td>100.00%</td>
<td>5.75%</td>
</tr>
</tbody>
</table>

Source: IDC Data, September 2021

In terms of global smartphone shipments, the global handset market continued its upward recovery with 331 million smart handsets shipped across the world in the three months July-September 2021.

This is an 18 million handset increase in smartphone shipments amid supply chain challenges associated with COVID-19 during the period.
In terms of market share, Samsung maintained its leadership in global quarterly handset shipments with 69 million units while Apple leapfrogged Xiaomi to number 2 with more than 50 million shipments in the 3 months July - September 2021.

Apple’s jump in performance was largely driven by the release of its iPhone 13Pro ranges.
Increased GDPR Compliance Scrutiny for TikTok

Amid the exponential TikTok subscriber growth, some activists have blamed the TikTok algorithm for strong micro profiling that may be abused to trigger addictive traits such as drugs, adult content, and self-harm.

It has been claimed that the TikTok algorithm is one of the strongest shapers of perception and minds for young adults and therefore may have a significant role to play in culture, inclusiveness, as well as global politics.

Over and above activists’ concern with TikTok’s algorithm and micro profiling practices, a few countries in the European Union have taken special interest in TikTok’s compliance with data protection rules in the EU.

The Irish Data Protection Office in September 2021 announced special investigations into the company’s processing of personal data as well as age verification measures for under 13’s. Further, the regulator is investigating TikTok’s compliance with cross country data transfer practices.
Yet again, the sector witnessed fines for global search giant Google. This time round the penalty/fine was issued by the Autorité de la Concurrence (French Competition Authority) on account of Google’s alleged failure to carry and establish fair compensation terms for local news and copyright owners.

In line with the French Digital Copyright Directive of 2019, Google was obliged to put in place a framework for the carriage of locally copyrighted news content in its search results. However, domestic copyright owners alleged that Google instead demanded content with attendant forfeiture of copyright for no financial consideration.

The local creators interpreted this as an abuse of Google’s market power and subsequently petitioned the local competition authority leading to a Euro 500 million fine. Google, on the other hand, has submitted that this is in total disregard of progress so far made regarding ongoing dialogue with copyright holders.
Communications Regulator gets New Board

The sectoral administrative highlight during the quarter was the inauguration of the UCC Governing Board for a three-year term.

The 8-member Board that was commissioned by the Minister of ICT & National Guidance Hon. Dr. Chris Baryomunsi is led by Dr. Dorothy Okello as Chairperson, supported by a spectrum of thought leaders in the fields of Law, Engineering, Public Policy and Administration.
National Service and Infrastructure Licenses – 3Q21

The table below shows the status of National Telecom Operations in Uganda as of September 2021.

<table>
<thead>
<tr>
<th>License Category</th>
<th>National Service and Infrastructure Operators - 3Q21</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Telecom Operator - NTO</td>
<td>MTN</td>
<td>Airtel</td>
</tr>
<tr>
<td></td>
<td>Uganda Telecom</td>
<td>Lyca Mobile</td>
</tr>
<tr>
<td>National Public Service Provider – NPSP</td>
<td>Liquid Telecom</td>
<td>TruIT Uganda Ltd</td>
</tr>
<tr>
<td></td>
<td>Blue Crane Communications Ltd</td>
<td>Bandwidth and Cloud Group</td>
</tr>
<tr>
<td></td>
<td>United Wireless</td>
<td>Internet Solutions</td>
</tr>
<tr>
<td></td>
<td>Hamilton</td>
<td>Echotel Proprietary Uganda Ltd</td>
</tr>
<tr>
<td></td>
<td>Cloud core Services</td>
<td>Roke Telecom</td>
</tr>
<tr>
<td></td>
<td>Somha Solutions Store Ltd</td>
<td>Seacom Uganda Ltd</td>
</tr>
<tr>
<td></td>
<td>Simbanet</td>
<td>Gilat Telecom</td>
</tr>
<tr>
<td>National Public Infrastructure Provider - NPIP</td>
<td>Smile Communications Uganda Ltd</td>
<td>American Tower Corporation (ATC)</td>
</tr>
<tr>
<td></td>
<td>Uganda Electricity Transmission Company Limited</td>
<td>Ubuntu Towers</td>
</tr>
</tbody>
</table>
Following receipt of clearance from the Central Bank, to its proposed regulatory sandbox Programme, global payments transfer player **MS Wave Transfer Limited** launched its mobile payments transfer service in the market.

Further, the Central bank continued with its appraisal of new applicants seeking authorizations to provide payment systems and payment service provider services.
Piloting of the E-Government Procurement System

On 1st July 2021, the government rolled out the Electronic Government Procurement System, also known as the eGP in eleven selected entities as a pilot project.

The eGP is a web-based tool used to carry out public procurement and disposal. It uses information and communication technology (ICT) to conduct the end-to-end government procurement and disposal process online. It involves all stages right from procurement planning, bidding, evaluation, award, contract management, invoicing, and payment for supplies, works, and services. Government plans to roll out the program at all Ministries, Departments, and Agencies within the next 3 years.
Renewed Government Commitment to Satellite Broadband

As countries continue to develop connectivity strategies for hard-to-reach areas, Satellite connectivity is slowly picking as a viable last-mile connection option.

Likewise, Uganda, has continued dialogue on international satellite broadband connectivity with new partnerships with global satellite providers in Japan and Russia.

In separate briefs by the Ministers of ICT and Science & Technology, the government pronounced advanced negotiations for international satellite capacity with Japan-based partners and committed financing for the revamp of the Mpoma Earth/Ground Station.
Emergence of Online Concerts

In the broadcast and multimedia space, the quarter has seen the emergence of online concerts. The COVID-19 pandemic has created an opportunity for ICTs to bridge the entertainment gap that has arisen as several broadcasters hosted music shows and entertainment skits. Musicians and socialites of the Kampala nightlife have come to household living rooms.

The proliferation of online concerts has exposed Ugandan music and online content beyond borders resulting in endorsements from prominent African musicians such as Wizkid and Davido using the #TwendeTupaate and #ItsAFriday hashtags.

Source: NBS TV, Next Media Services
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SERVICE ACCESS
The industry has continued its sustained increase in the mobile and fixed telephone subscription base.

For the first time, the market crossed the **29 million** fixed and cellular subscriptions mark.

In terms of net quarterly additions, only 200,000 new subscriptions were posted in the three months July-September 2021.

This is only a third of the net quarterly subscriber additions witnessed in the preceding two quarters. This slowdown in subscriber additions may be indicative of the easing of new demand attributed to COVID-19 and work/study from home protocols in the last 4 quarters.
Also, the period July-September 2021 witnessed one of the more heightened COVID-19 lockdowns and hence slowdown in domestic movements and business. This had an encumbering effect on new SIM acquisitions.

Unlike other quarters, there was limited new SIM demand from learners that had propelled SIM acquisitions during the previous lock-down.

Despite the slowdown in quarter-on-quarter additions, the 12-month period ending September 2021 translates into a double-digit year-on-year growth with 2.6 million new customers connected in the 12 months.

This is a 10% year-on-year growth amid a COVID-driven slowdown.

In terms of telephone penetration, the **29.1 million subscriptions** translate into a telephone penetration of 69%. This may be interpreted as a national penetration of 7 lines out of every 10 Ugandans (regardless of age).
Broadband Connections

Out of the 200,000 new mobile connections during the quarter, 170,000 were data-enabled connections. This is 85% of all new mobile connections.

The high broadband connectivity conversion remains driven by the continued shift to data-enabled low-cost entry terminals pushed by both Mobile Network Operators and independent handset importers.

During the period under review, the market yet again saw continued vendor MNO partnerships for flagship brands such as the Camon 15 and the Infinix Note 10 series. These partnerships included bonus data offerings by the different MNOs.
At the end of September 2021, total internet subscriptions have for the first time crossed the **22 million mark**. This translates into a broadband penetration rate of **52%**.*

In a nutshell, every 1 in 2 Ugandans has an active internet connection.

* **Note:** there might be incidents of multiple SIM connections to an individual user
On a year-on-year comparison, the upward trend in broadband connections is similar to that observed in the fixed and cellular subscriptions. The broadband subscriptions base has grown by 1.9 million (10%) as of September 2021 compared to September 2020.
Network Connected Devices/Terminals (Millions)

SMART PHONE

1Q21 8.1 M
2Q21 9.7 M
3Q21 9.4 M

BASIC PHONE

1Q21 5.1 M
2Q21 3.9 M
3Q21 3.5 M

FEATURE PHONE

1Q21 17.9 M
2Q21 18.5
3Q21 19.8 M
During the period under review, the number of network-connected devices grew by more than 580,000 terminals. While this is commendable growth, it is only two-thirds of the handset growth posted in 2Q21.

The slowdown in the growth of network-connected devices might be indicative of the fact that the COVID-driven terminal connection of the past three quarters has stabilized.

Also, worth noting is the fact that the almost 600,000 new terminal connections are almost three times the growth in SIM cards. This may be indicative of behavioral shifts from dual/multi-SIM gadgets. However, this is too early to tell.

This behavioral pattern may have been driven by study-from-home connectivity challenges that saw parents shift their secondary SIM cards to new devices and routers for home-school.

Further, the share of feature phones continued to grow during the quarter. This was on account of significant promotional activity for this segment.

At the end of September 2021, the share of feature phones had grown to 60%, up from 58% in June 2021. Both smartphone and basic phone share of network-connected smartphones continued to fall.
Mobile Financial Services
Subscriptions and Agent Points

Registered Mobile Money Subscriptions

3Q20: 27,720,859
4Q20: 28,045,909
1Q21: 30,546,414
2Q21: 31,315,302
3Q21: 32,250,242
The total number of mobile money accounts increased by 900,000 accounts. At the end of September 2021, the total number of registered mobile money accounts stood at **32.3 million**.

This growth is inconsistent with the number of new SIM cards activated during the quarter. The difference is largely attributed to account activity treatments for financial services and GSM cellular services.

In terms of 90-day active users, the total number of mobile money accounts that made at least one Mobile Financial Service (MFS) transaction in the 90 days preceding 30th September 2021 stood at 21.3 million.

This is 66% of total registered mobile subscriptions.
The number of active mobile money agents grew by a factor of 11% from 285,371 in June 2021 to 315,895 by the end of September 2021. This reflects a sustained increase in business activity that is gradually positioning the mobile as a financial tool.

In comparison to 2020, the agent footprint across the country has grown by 39%. Over 88,000 mobile money agents have been added to the DFS ecosystem over the last twelve months.

The financial ecosystem has positioned mobile money as a DFS tool in that banking institutions have partnered with mobile money agents. This could explain the growth in agents over the last 12 months ending September 2021.
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INDUSTRY TRAFFIC AND TRANSACTION VOLUMES
The number of minutes of domestic (on and off-net) traffic grew to 16.8 billion in the period July-September 2021. This is almost 1 billion minutes more than domestic traffic volumes recorded in 2Q21.

This 6% domestic traffic growth represents the highest quarter-on-quarter domestic traffic growth in the last 12 months (four quarters).

Noteworthy is the fact that the intra-quarter domestic traffic growth surpasses the subscriber growth by a factor of six times (6X).

This is indicative of increased usage and spending by cellular and fixed customers on voice services.
On a year-on-year comparison; the 3Q21 quarterly performance translated into a quarterly traffic growth of **2.3 billion minutes**, with a quarterly traffic total of 16.8 billion minutes in 3Q21 from 14.4 billion minutes realised in 3Q20.

This is a 16% change in quarterly traffic performance between 3Q20 and 3Q21. Again, this change surpasses the change in subscriptions between the time frames by a factor of 1.6 times (1.6X).

In terms of domestic traffic spread, 16.6 billion on-net minutes were posted during the quarter while only 148 million domestic offnet minutes were realised during the same period.
From the above traffic distribution and recorded subscriptions, it can be deduced that the average consumer made 570 minutes of intra-network (on-net) calls and only 5 minutes of inter-network (off-net) calls during the quarter.

International Voice Traffic

Total international traffic (calls to and from Uganda) dropped by 10 million minutes in the three months that ended 30th September 2021. This drop is consistent with the international traffic contraction realized over the last twelve (12) months.

The contraction in international traffic is attributed to traffic migration to Over-The-Top (OTT) calling platforms, as well as the restricted international travel that translated into slow-down in global business and related communication during the period.
International Roamers

QUARTERLY TOTALS (MINUTES)

127 Million
117 Million

TOTAL INBOUND ROAMERS (000's)

<table>
<thead>
<tr>
<th>Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td>3Q20</td>
</tr>
<tr>
<td>4Q20</td>
</tr>
<tr>
<td>1Q21</td>
</tr>
<tr>
<td>2Q21</td>
</tr>
<tr>
<td>3Q21</td>
</tr>
<tr>
<td>4Q20</td>
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<tr>
<td>1Q21</td>
</tr>
<tr>
<td>2Q21</td>
</tr>
<tr>
<td>3Q21</td>
</tr>
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</table>

TOTAL OUTBOUND ROAMERS (000's)

<table>
<thead>
<tr>
<th>Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td>3Q20</td>
</tr>
<tr>
<td>4Q20</td>
</tr>
<tr>
<td>1Q21</td>
</tr>
<tr>
<td>2Q21</td>
</tr>
<tr>
<td>3Q21</td>
</tr>
</tbody>
</table>

© Uganda Communications Commission (UCC), 2021
Uganda remains a net recipient of roamers with 873,000 roamers from foreign networks visiting Ugandan cellular networks. This figure surpasses the 693,000 Ugandans roaming on foreign networks by almost 200,000 customers.

In terms of distribution of roamers, 60% of foreign roamers on Ugandan networks came from the Northern Corridor partner states of Kenya, Rwanda, and South Sudan.

Relatedly, 60% of Ugandans roaming in foreign networks roamed within the Northern Corridor partner states.
Having coincided with the second lockdown, quarter 3Q21 saw a spike in broadband traffic as learners and employees adopted online working methods.

During the period, total broadband traffic grew to 100 billion MBs from the 69 billion MBs of 2Q21. This is the first time that more than 100 billion MBs have been downloaded in the quarter.

Similar to trends witnessed in the voice segment, the rate of growth of broadband traffic outstripped the recorded growth in broadband subscriptions. The quarter-on-quarter broadband traffic growth rate stood at 45% while the growth of the subscriptions was only 1%.

Again, the trend signifies deeper usage by both new and incumbent subscribers partly driven by the lockdown at the time.
Pricing and Promotional Highlights

The key demand drivers during the quarter remained the heavy promotional activity introduced by the Telcos.

These include the following:

- Airtel’s Tugabane Promotion was revised to cover a host of other broadband services such as PakaPaka data subscriptions.
- MTN’s FTTH solution Wakanet Pro has gained traction within major areas of the Central Business District with planned rollouts in other prime areas within Kampala and major towns.
• Smile launched a 20% extra data recharge promotion on the MySmile App. The data recharge is received instantly upon recharge of any smile’s data bundle using the MySmile App.

• Sombha Solutions unveiled a tailor-made Google Workspace package for the businesses of its internet subscribers, which is as low as UGX 572,320. It has a 5 Mbps unlimited connection, 3 business emails, and 1 domain.
The volume of USSD sessions during the quarter ended September 2021 grew to 8.6 billion sessions. This is a 7% increase from the volume of USSD sessions posted in 2Q21.
This growth in USSD sessions translates into a quarterly session average of almost 300 sessions per active mobile subscription.

This is an average USSD session usage increase of 20 sessions per mobile subscriber from the 277 quarterly usage average of 2Q21.

On a month-by-month comparison, the total number of sessions averaged 2.8 billion per month during the quarter. The quarterly peak was realized in August 2021 with a total of 2.9 billion USSD sessions.

In comparison to the 7 billion sessions posted in 3Q20, the number of sessions in 3Q21 grew by 23% percent to a total of 8.6 billion sessions.

**Mobile Money Transactions**

**Transactions Quarter on Quarter Growth**

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Transactions</th>
</tr>
</thead>
<tbody>
<tr>
<td>3Q20</td>
<td>0.925 Billion</td>
</tr>
<tr>
<td>4Q20</td>
<td>0.966 Billion</td>
</tr>
<tr>
<td>1Q21</td>
<td>0.960 Billion</td>
</tr>
<tr>
<td>2Q21</td>
<td>1.02 Billion</td>
</tr>
<tr>
<td>3Q21</td>
<td>1.1 Billion</td>
</tr>
</tbody>
</table>

The number of mobile money transactions in 3Q21 (P2P transfers, Momo Payments, international mobile money transfers, and agent-assisted transactions) grew to 1.1 billion transactions from 1.02 billion transactions in 2Q21.
This is a monthly average of 367 million transactions per month during 3Q21 from a monthly average of 341 million transactions in 2Q21.

This further translates into a monthly average of 18 transactions per active mobile money subscription in September 2021. This is a 37 million transaction jump from the monthly transaction average of June 2021.

The licensing of new international mobile money transfer providers has also seen continued growth in mobile money-enabled cross-border transfers.

In 3Q21, the total value of international mobile money transfers grew to UGX 525 billion from UGX 503 billion in 2Q21.

Uganda yet again remains a net cross-border mobile money recipient with a total incoming transaction value of UGX 500 billion compared to UGX 24 billion international outbound mobile money transfers during the period.
Despite the heightened lockdown during the period, the sector showed significant resilience with total sector revenues maintaining the **UGX 1.1 trillion** quarterly revenue total.

In terms of submarket performance, the passive tower lease segment showed the greatest growth with quarterly revenue **growth of UGX 63 billion** from the UGX 125 billion to UGX 188 billion quarterly revenues between 2Q21 and 3Q21.
The mobile data segment followed with quarter-on-quarter revenue growth of UGX 18 billion revenue growth between the two-quarters 2Q21 and 3Q21.

Data growth has become synonymous with increased data consumption patterns during lockdowns.

On the other hand, VAS and Mobile Voice remained steady with less than UGX 1 billion-shilling change in revenues between the two quarters.

**International Interconnect Revenue Position**

In the segment of the international markets, the sector posted total interconnect revenues of UGX 26.2 billion in 3Q21, down from the UGX 27.4 billion realized in 2Q21.

Similarly, national carrier expenditure on international outbound traffic termination also dropped by UGX 3.5 billion from UGX 20.8 billion in 2Q21 to UGX 17.2 billion in 3Q21.
Again, reduction in international voice traffic and revenues has become synonymous with periods of restricted international travel.

The increased bandwidth consumption saw a modest UGX 0.8 billion increase in carrier spend on international bandwidth from UGX 7.1 billion spend in 2Q21 to UGX 7.8 billion in 3Q21.

The small growth in international bandwidth expenses despite significant growth in downloads may be indicative of the fact that the sector has started to enjoy the local hosting dividend by different content owners.

A combination of changes in international voice and bandwidth consumption patterns translated into a positive revenue net position of UGX 1.1 billion during the 3Q21. This is a UGX 1.6 billion improvement from the negative net position realized in 2Q21.
Posta Uganda Launches the Eurogiro Financial Supermarket Platform.

In a market-first, Uganda Post Limited (UPL) trading as Posta Uganda in partnership with EUROGIRO launched the Eurogiro Financial Supermarket, to offer and extend financial services such as mobile money transfers, agency banking, and international money transfers to clients and the entire public.

The Eurogiro Supermarket platform is designed as a white label, integrated turnkey solution, both via Cloud and API (Application Programming Interface). It is an open payment platform that empowers postal organizations to actively engage in financial services, both locally and globally. Eurogiro hosts key players in the DFS ecosystem such as MoneyGram, Mobile Money, Western Union, World Remit. The purpose of this platform is to strengthen and ease cross-border financial transactions and businesses.

This platform will enable the public to send and receive money to over 200 countries using a simple, reliable, swift, and convenient platform which will help in bridging the financial gap between rural Uganda and the digital world.
Last-Mile Delivery through Mobile Applications

The quarter witnessed yet another wave of mobile applications through the Post and Courier services segment.

Following digitization in the Post and Courier market by many companies such as Godel’s Godel Delivery App, DHL’s Africa e-shop, Sail Courier introduced the Sail Courier App.

With the Sail Courier App, one can easily register to be a courier agent. This has also created employment opportunities in line with the Buy Uganda, Build Uganda (BUBU) policy.

The app is a last-mile delivery application that enables clients to click and request for delivery of items to their homes. This wave of innovation in the Post and Courier segment reflects the ease of entry into the Post and Courier markets in Uganda, which has over 30 different players. As such, consumers have a wide variety of products and services to choose from, which has, in turn, led to efficiency, productivity, and competitiveness in the industry.
Domestic Mail Volumes

In 3Q21, the domestic mail volume grew to 107,148 mails, up from 66,215 in 2Q21, translating into a 62% quarter-on-quarter growth. The observed surge in volumes of mail traffic stems from the ability of the different Post and Courier players to innovate and take advantage of the mobile and broadband uptake.

Consequently, the different players in the Post and Courier ecosystem such as Godel, SGA, UPL, Sail Courier and S-M Cathan Logistics have digitized their services with different online applications.

Domestic Mail Volume Contributions

Post and Courier operators such as Aramex, New Times Express Ltd, UPL, SGA, and Sail Courier have contributed greatly towards boosting growth in the domestic mail volumes.

In 3Q21, Aramex contributed 28.5% to the domestic mail volumes, followed by New Times Express Ltd with 18%, Uganda Post Limited with 15.9%, and SGA with 15.8%. Sail Courier contributed 7.1%, with other operators contributing 14.7%.
Outbound and inbound East Africa Mail Volumes

Outbound East Africa Mail Volumes

In the period July to September 2021, the mails sent from Uganda to other East African countries increased to 1,333, up from 887, deciphering into a 50% quarter-on-quarter growth. This growth is partly attributed to the benefits from the East African Community (EAC) and its revision in the EAC COVID-19 protocols such as the COVID-19 pass that was introduced to quicken driver clearance at the different cross-border points.

Inbound East Africa Mail Volumes

In 3Q21, the mails received into Uganda from other East African countries rose to 4,291, up from 3,476, translating into a 23% quarter-on-quarter increment.
Inbound Rest of World Mail Volumes

In the three months July to September 2021, the mails received into Uganda from the Rest of the World increased to 42,782, up from 38,910, registering a 10% quarter-on-quarter growth.

EMS Inbound International Mail Volumes

In 3Q21, expedited mail services (EMS) inbound international mail volumes grew to 1,438, up from 1,271 in 2Q21, translating into a 13% quarter-on-quarter growth.
Chapter 7

Broadcasting
TV MARKET

Free-to-Air
The delivery of FTA channels is mainly via the government-owned SIGNET UG Ltd. By the end of September 2021, 40 FTAs were carried on the SIGNET platform.

Pay-TV
The Pay-TV market in Uganda is served by a combination of Satellite, Cable, and Digital Terrestrial networks, with 7 licensed content aggregators.

3Q21 has seen a slight contraction in the total active subscribers from a total of 1.60 million as of June 2021 to 1.54 million in September 2021. This is as a result of seasonal subscriber contractions in the quarter July - September. This seasonal contraction has been consistently observed over the last three years.
Programming
Pay-Tv service providers deliver a range of content on their platforms and the number of channels on a network may vary slightly month to month.

Channel Distribution by Pay-Tv Providers

Bouquet Pricing
Bouquet pricing is diverse, with Pay Tv providers offering packages targeted at various market segments. Subscriber numbers, by and large, vary heavily with price, indicating a high price sensitivity for Pay-Tv content.

<table>
<thead>
<tr>
<th>Station</th>
<th>Bouquet</th>
<th>Price</th>
<th>Channels</th>
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<tbody>
<tr>
<td>DSTV</td>
<td>Access</td>
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<td>STARTTIMES (Satellite)</td>
<td>NOVA</td>
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<td>STARTTIMES (Terrestrial)</td>
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<td>STARTIMES (Terrestrial)</td>
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<td>Asia Stand Alone</td>
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<tr>
<td>GOTV</td>
<td>GOTV Max</td>
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COVID-19 BUSINESS CONTINUITY MEASURES DURING THE LOCKDOWN

REMOTE SERVICES

Applications
- Licensing
- Spectrum Authorisation
- Type Approval
- Short codes
Submit to registry@ucc.co.ug

Payments
- Supplier invoices
- Billing inquires
- Payment slips
Submit to registry@ucc.co.ug

Correspondences
- Reporting
- Representation
- Recordings
- Submissions
Submit to registry@ucc.co.ug

Deliveries
- Parcels
- Device samples
Every Monday & Thursday
9 am – 12 Midday
UCC House Plot 42-44
Spring Road Bugolobi

Inquiries
Consumer Advisory Feedback
Submit to ucc@ucc.co.ug
Toll-Free: 0800 222 777

Complaints
Consumers dissatisfied with services rendered by operators may lodge a complaint
complaints@ucc.co.ug
Toll-Free: 0800 222 777

Our Head and Regional offices are operating at 10% capacity
‘Driving the development of a robust Communications Sector in Uganda’

For further information contact us:
0800 222 777
www.ucc.co.ug
@UCC_Official