UGANDA COMMUNICATIONS COMMISSION

Market Performance Report

2Q22



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1. The industry,
2. Prospective entrants,
3. Government,
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From Left to Right:

Victor Kiplangat:	*Commonwealth Gold winner in Birmingham 2022*
Joshua Cheptegei	*World Atheltics Championships Gold winner Oregon 2022*
Jacob Kiplimo:	*Commonwealth and WAC Gold winner Oregon 2022*
Teddy Nakimuli:	*First Ugandan female boxer to win a medal at the Commonwealth Birmingham 2022*

Introduction

This is a review of the industry performance, trends and key developments for the quarter starting April to June 2022. 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

Global Context



1.1. ITU Global Policy Dialogue on ICT Inclusion and Extension to the Underserved, Kigali 2022

On the global ICT policy front, the highlight of 2Q22 was the 8th World Telecommunication Development Conference (WTDC) held in Kigali, Rwanda in June 2022. This is the first time that this major ICT policy conference has been held in the global South .

The WTDC quadrennial conferences are held in between ITU's Plenipotentiary Conferences to develop strategies and provide global policy direction towards addressing ICT connectivity gaps.

WTDC 2022 attracted more than 2,100 participants from 150 ITU Member States and 340 Sector Members bringing together national ICT policymakers, regulators, academia, think tanks, manufacturers, and other ICT ecosystem actors.

The 10-day forum adopted the Kigali Action Plan which principally agreed to align Global ICT digital development goals with the UN's SDGs for the year 2030. Further, different partners made a series of national ICT policies and financing commitments to bridge digital gaps in the respective communities.

At the end of WTDC 2022, ITU Member States and Sector Members had committed a collective USD 25 Billion in Digital Connectivity pledges.







1.2. Uganda and Patrick Masambu re-elected to the helm of the International Telecommunications Satellite Organisation (ITSO)

In a global acknowledgment of Uganda's contribution to the International Satellite Policy Dialogue, Uganda was re-elected to the ITSO Advisory Committee while Mr. Patrick Masambu was elected for a second term as Director General of ITSO.

The International Telecommunications Satellite Organization (ITSO) is an intergovernmental organization charged with overseeing the public service obligations of Intelsat, which was privatized in 2001.



ITSO Assembly of Parties gives Director General Patrick Masambu a new 4-year term.



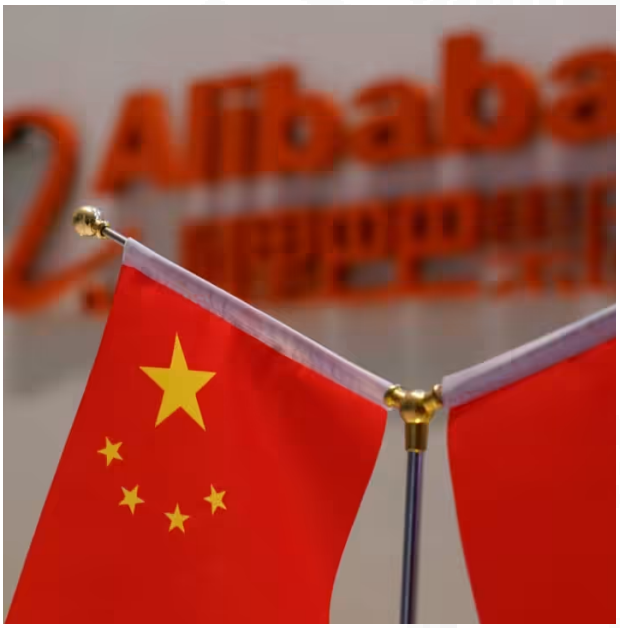
Picture courtesy of ITSO

1.3. China overhauls Antitrust laws to curb big players

In the world of ICT antitrust policy, 2Q22 saw the adoption of amendments to China's Anti-Monopoly Law (AML) addressing antitrust abuses of tech platforms, data, and algorithms.

The amendment that specifically states that; "business operators shall not exclude or limit competition by abusing data, algorithms, technology, capital advantages, as well as platform rules" provides the first Chinese policy direction toward addressing emerging data-based abuses.

The new amendments bestow upon the world's biggest ICT antitrust watchdog (by subscriber size) powers to address new abuses like platform tying, data exclusivity, and excessive pricing of ICT platform channels.



Source:Nikkei.com



This is a fundamental new ICT antitrust precedent paying new regulatory focus on data use and algorithms and shifting away from hardware and infrastructure-driven dominance/ commercial advantages of the last 20 years.

In Africa, many a regulator are yet to address emerging data and algorithm-based antitrust conduct even if some cases of data and platform restrictions can be seen in ecosystems like digital payments and Application Programming Interface (APIs)

1.4. EU and US Data Sharing Pact

Following the European Court of Justice's striking down of the "Privacy Shield", the US and the European Union announced principle agreements for a new data transfer framework between Europe and the United States.

Prior to July 2020 striking down of the privacy shield, Companies could transfer EU citizen data to US partners (within certain privacy standards).

However, this was successfully challenged before the European Court of Justice on grounds that the data transfer framework exposed European citizens to unlimited US government national security laws and privacy violations. This effectively outlawed the transfer of EU citizen data by companies across the Atlantic.

In a joint statement following the signing of the EU-US data sharing pact, Presidents Joe Biden (US) and Ursula von der Leyen (European Commission), stated that the new agreement is aimed at promoting growth and innovation in Europe and the USA and help countries across the Atlantic compete in the Digital Economy.

It is estimated that the Trans-Atlantic Data flow supports the estimated USD 7.1 Trillion in business and economic activity between the EU and the US annually.



Courtesy: White House and the European Commission

1.5. Big Tech maintains leadership in Global Business

Big tech companies maintained their stranglehold on global business with Apple, Microsoft, Alphabet and Amazon maintaining their top 5 global ranking by market capitalization at the end of June 2022. Big tech was only upstaged by Saudi Aramco, the global energy giant, on the back of increased global fuel prices during the quarter.

Table 1: Top 5 Companies by Market Capitalisation June 2022

Company	Rank	Market Capitalisation, 30th June 2022, in Billion Dollars	Rank	Market Capitalisation, 31st December 2021, in Billion Dollars	Rank	Market Capitalisation, 31st December 2020, in Billion Dollars
Saudi Aramco	1	2.274	4	1.906	2	1.865
Apple	2	2.213	1	2.913	1	2.256
Microsoft	3	1.921	2	2.525	3	1.682
Alphabet	4	1.438	3	1.922	5	1.185
amazon	5	1.081	5	1.691	4	1.634

Big Tech Revenue Performance

In terms of revenue, Amazon grossed the highest revenues amongst the big tech with USD 121 billion in sales followed by Apple with gross revenues of USD 83 billion. The top 5 big tech companies averaged year-on-year growth of 8% between 2Q21 and 2Q22.

Table 2: Big tech revenue performance April - June 2022

	Alphabet	Apple	Meta	amazon	Microsoft
Market cap, June 2022	USD 1,430 Billion	USD 2,231 Billion	USD 436 Billion	USD 1,081 Billion	USD 1,920 Billion
2Q22 Revenues	USD 69.7 Billion	USD 83 Billion	USD 28.8 Billion	USD 121 Billion	USD 51.9 Billion
Percentage Annual Growth	13%	2%	-1%	7%	19%

Revenue Breakdown for select Tech Companies June 2022

Google (In Millions)	Quarter Ended June 30th	
	2021 (in USD)	2022 (in USD)
Google Search & other	34,845	40,689
YouTube Ads	7,002	7,340
Google Network	7,597	8,259
Googel Advertising	50,444	56,288
Google other	6,623	6,553
Google Services Total	57,067	62,841
Google Cloud	4,628	6,276
Other Bets	192	193
Hedging gains (losses)	7	375
Total Revenues	**61,880**	**69,685**

Source: Google

Apple (In Millions)	3 months ended June 25/26		9 months ended June 25/26	
	2021 (in USD)	2022 (in USD)	2021 (in USD)	2022 (in USD)
Net Sales:				
Products	63,355	63,948	245,241	232,309
Net Sales by Category:				
iPhone	40,665	39,570	162,863	153,105
Mac	7,382	8,235	28,669	26,012
iPad	7,224	7,368	22,118	23,610
Wearable, Home & Accessories	8,084	8,775	31,591	29,582
Services	19,604	17,486	58,941	50,148
Total net sales	**82,959**	**81,434**	**304,182**	**282,457**

Source: Apple

Meta (In Millions except for percentages)	Quarter Ended June 30th	
	2021 (in USD)	2022 (in USD)
Income from operations	12,367	8,358
Operating margin	43%	29%
Provision for income taxes	2,119	1,499
Effective tax rate	17%	18%
Net income	10,394	6,687
Diluted earnings per share	3.61	2.46%
Total Costs and expenses	16,710	28,822
Total Revenues	29,077	**20,464**

Source: Meta

1.6. Broadcast and Multimedia Highlights in the Quarter

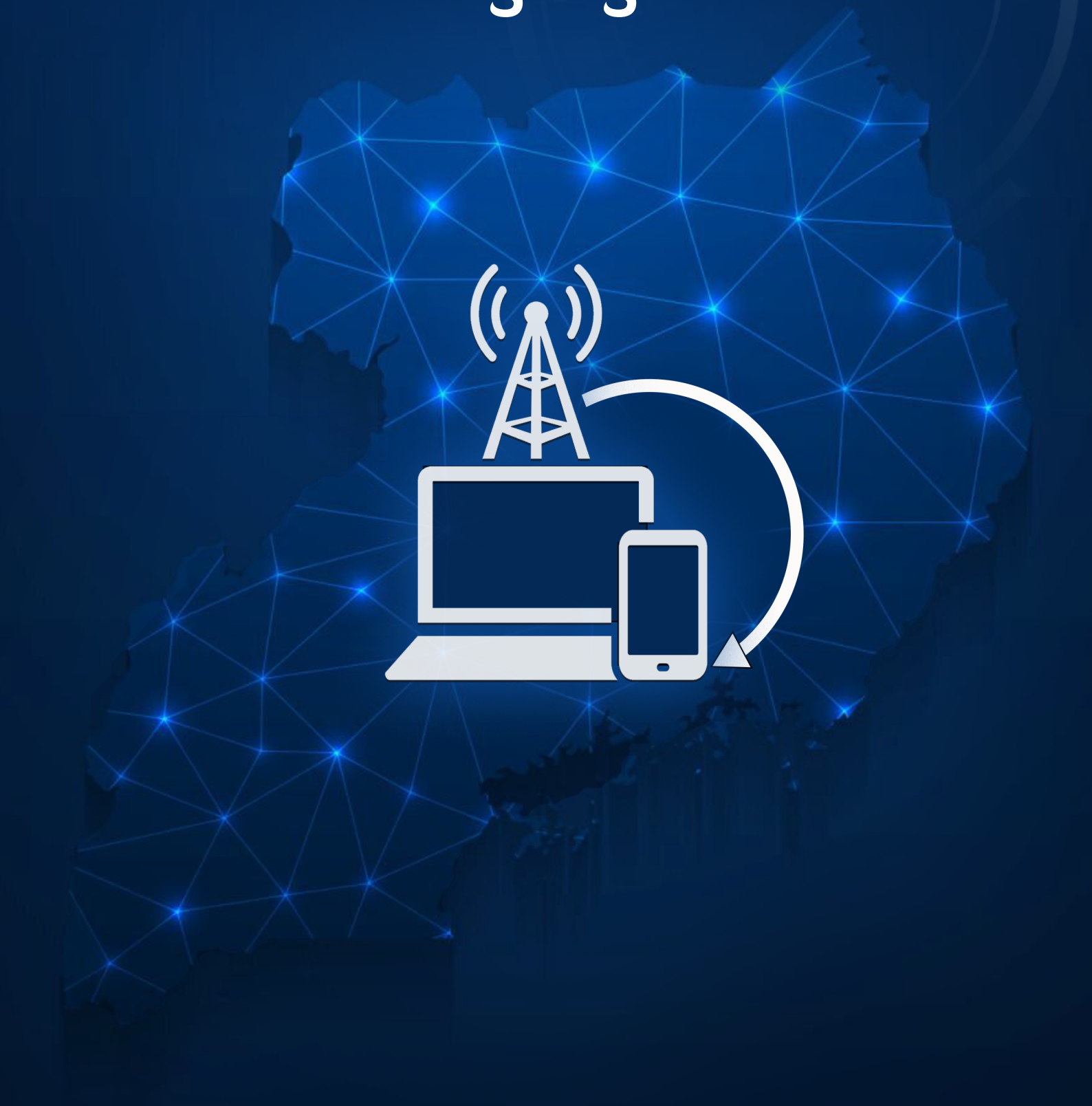
In the media space the top 5 global brands posted a total of USD 300 Billion in revenues during 2Q22. Comcast tops the list with quarterly revenues of USD 116 Billion followed by Walt Disney Company which grossed USD 72 Billion.

Ranking	Company		Market Value	Q2 Revenues
1	COMCAST	Comcast Corporation Class A	205,718	116,385
2	Walt Disney	Walt Disney Company	215,326	72,982
3	Charter COMMUNICATIONS	Charter Communications, Inc. Class A	97,924	51,682
4	NETFLIX	Netflix, Inc.	95,683	30,402
5	Paramount Pictures	Paramount	20,132	28,586

In the world of Video streaming, the segment saw subscriber drops by market leaders like Netflix and new conversations about the introduction of adverts in select Netflix entry packages.

App	Subscriptions	Top franchises
YouTube	2 billion	
NETFLIX	221 million	Ozark, Bridgerton, Orange is the new black, Arcadia
amazon prime	200 million	Alex Rider, Carnival Row, Good omens,Jack Ryan
Disney+	137.7 million	Disney, Pixar, Marvel, StarWars, National Geographic
HBO max	92.1 million	HBO, Discovery +
Tencent Video	900 Million	

Domestic Highlights



2.1. New Digital Tax Initiatives for Uganda

Keeping in tandem with global digital taxation initiatives, Uganda revisited previous digital tax efforts especially for non-resident digital service providers.

Following the 2011 Value Added Tax (VAT) Provisions allowing for collection of VAT on online digital services by non-resident persons and a July 2020 clarification of filing and frequency of digital service VAT, URA has finalised plans to enforce VAT on digital services provided by non-resident persons. The collection of this tax comes into effect starting July 2022.



Uganda becomes the fourth country in Africa to enforce digital tax on non-resident persons providing digital services to residents. The first movers include South Africa, Nigeria and Kenya.

The URA has made contacts with leading non-resident digital service providers like Google, Netflix, Meta and Spotify in preparation for enforcement of this new tax obligation. Affected services may include online advertising, online music and video streaming, supply of software, access to databases, films and games of chance/betting.

2.2. Central Bank Outlaws Mobile Money-Crypto Currency Conversions

During the quarter, the Central Bank reiterated Government's October 2019 position on the matter of crypto currency trading within the National Payment Systems.

In an April 2022 communication, the Central Bank banned exchange of crypto currencies for mobile money and vice versa. Licensees under the National Payments Act of 2020 were reminded of potential revocation of operational licenses should they fail to adhere to these directives as stipulated under Section 13 of the NPS Act 2020.

Following BOU's announcement, leading crypto exchanges like Binance suspended UGX mobile money deposits and withdrawals on its exchange effective 30th May 2022.



2.3. Administrative Changes at MTN, Wim bids farewell

During the quarter, MTN Uganda Limited announced that its CEO **Mr. Wim Vanhelleputte** will be moving on to a new Group Role as Operating Executive for the West and Central African Markets (Liberia, Guinea Conakry, Guinea Bissau and Congo Brazzaville).

The announcement brings an end to Wim's 6-year tenure the highlights of which included renegotiation of MTN's NTO license with Government of Uganda, separation of MTN Uganda's cellular & mobile money operations and the first NTO Public Listing in Uganda.

Wim will be replaced by **Ms. Sylvia Wairimu Mulinge** who joins MTN from Safaricom PLC.

The UCC wishes **Mr. Vanhelleputte** the best at his new role, and welcomes **Ms. Mulinge** to Uganda.



Courtesy photo MTN: Outgoing MTN CEO Mr. Wim Vanhelleputte, and Current MTN CEO Ms. Sylvia Wairimu Mulinge

2.4. Annual UCC-CEO Cyber Security Breakfast

During the quarter, UCC hosted the Second Annual Cyber Security CEO Forum.

The Forum that brought together thought leaders from technology, Banking and Fintechs under the theme "Cybersecurity for Mobile Financial Services In the Telecommunication Sector: A growing Challenge" sought to take stock of emerging Cyber Security threats in the Fintechs and Digital Financial Services ecosystem as well as discuss joint efforts to promote the Safety and Integrity of DFS payment ecosystems.

The forum also appraised itself of requisite investment in Cyber Security defences that the industry should be considering.



2.5. UCC to install Communications Equipment Test System

During the quarter, UCC concluded Factory Acceptance Tests (FAT) for a new communications equipment testing system to support the type approval function at the UCC.

Type approval of gadgets and communications devices is a statutory mandate derived from the Uganda Communications Act (2013), to among others promote compliance to Regional and Global equipment standards.

Specifically, the Type Approval regime in Uganda aims to promote effective use of Radio Frequency (RF) Spectrum, electromagnetic compatibility and interoperability as well as health and safety in the use of Communications devices and equipment.

The new test system supplied by Rhode and Schwartz shall go live before end of 2022.



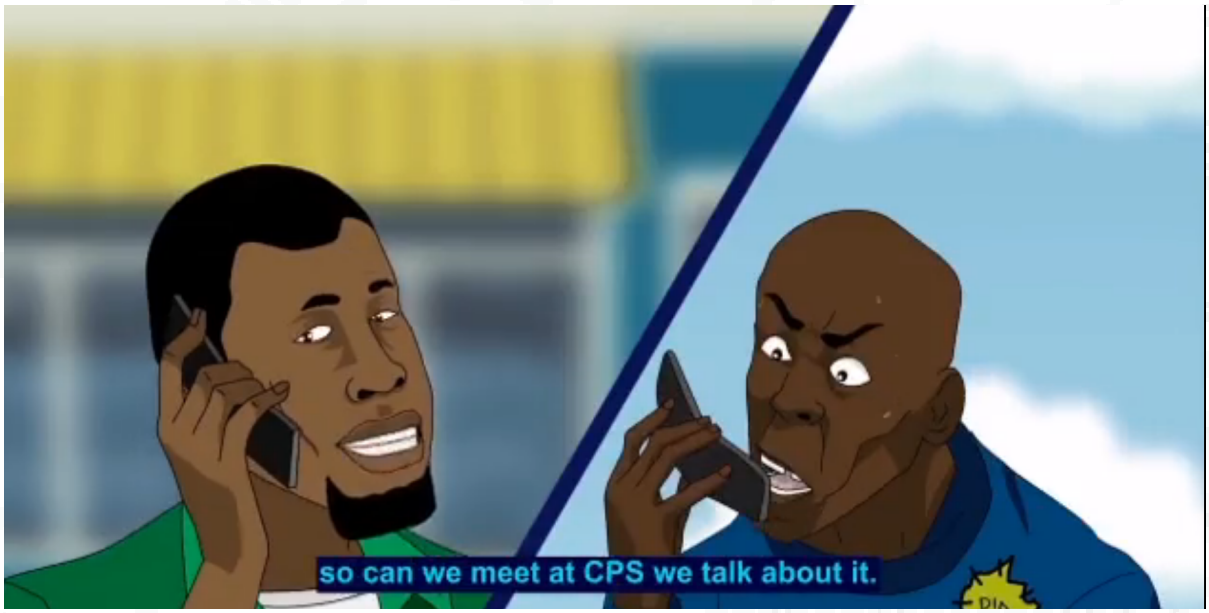
2.6. UCC Web Consumer Portal and "Tonfera" Campaign

Amidst the ever-rising misinformation, fake news, cyber fraud and other mobile related crimes, the quarter ending June 2022 witnessed the first intentional drive to reduce mobile related fraud dubbed the "*Tonfera*" campaign.

The UCC partnered with Mobile Network Operators (Airtel and MTN), Bank Of Uganda, and the National Association of Mobile Money operators to conduct increased media coverage on both traditional and social media platforms. Among others, the "*Tonfera*" campaign has five key focus areas:



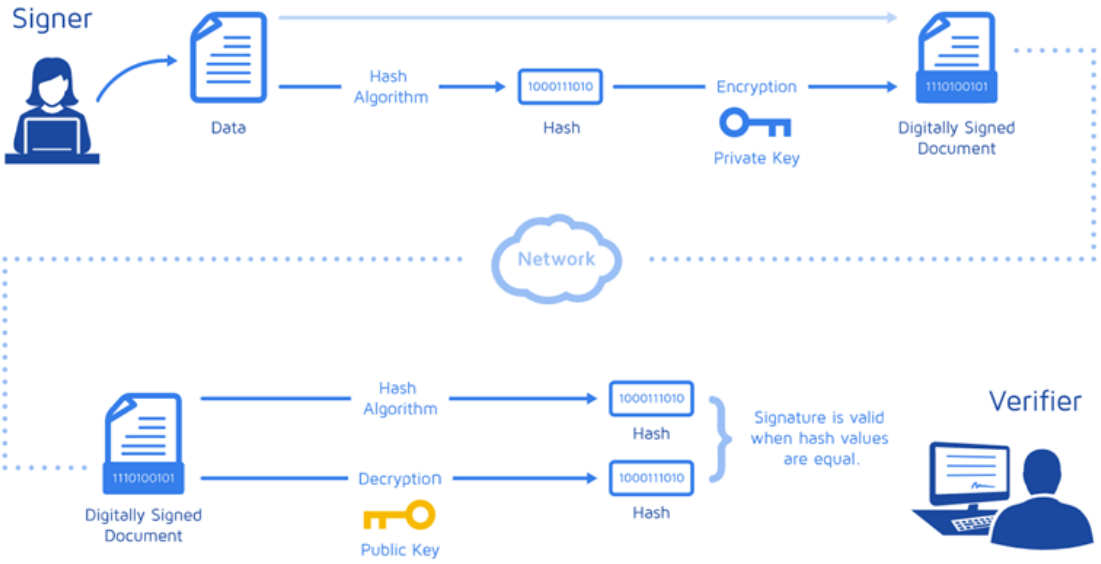
Under this collaboration, awareness content is being aired in a variety of languages on both audio (eighty radio stations) and visual (nine TV stations) media as well as on multiple digital platforms across the country.



2.6. Uganda Launches first PKI Licenses

During the quarter, National Information Technology Authority (NITA-U) concluded the establishment of a National Public Key Infrastructure (PKI) licensing and regulatory framework.

Licensing of PKI licenses was launched with Pos DigiCert receiving the first such license in the country. The PKI framework allows various IT solutions to achieve high levels of information confidentiality by utilizing strong data encryption and authentication with digital signatures and digital certificates.



The Public Key Infrastructure (PKI) is intended to facilitate secure electronic information transfer for a wide range of network activities such as e-commerce, internet banking, and secure email. Working with a trusted certificate authority, PKI technology can ensure the enforceability and acceptance of an e-signature solution in each local market.

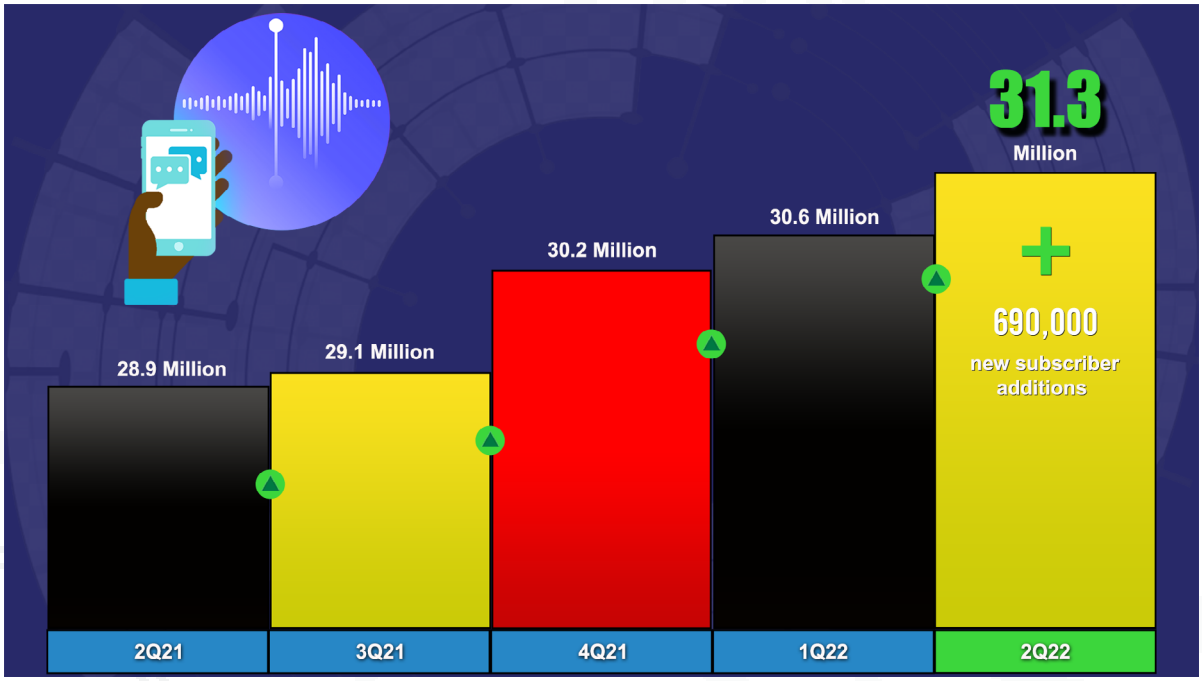
Subscriptions and Access



3.1. Telephone Subscriptions

In the months April to June 2022, fixed and mobile subscriptions grew by more than 690,000 new subscriptions, slightly outperforming the 1Q22 quarter on quarter growth. This brings the total number of telephone subscriptions to 31.3 million at the end of June 2022.

On a Year-on-Year comparison, the growth translates into 2.4 million new telephone subscriptions between June 2021 and June 2022. This is an 8% Year-on-Year growth in subscriptions.



The growth in subscriptions translates into a national telephone penetration of 73 lines for every 100 Ugandans.

3.2. Device Trends

Network Connected Devices

In terms of devices, the networks connected more than 1 million new gadgets in the three months April to June 2022. This new growth brought the total number of network connected devices to 36.1 million up from 35 million at the end of March 2022.

On a year-on-year comparison, active devices connected to the networks have grown by **4 million devices** between June 2021 and June 2022, and a 12% year on year growth.

Consistent with earlier device trends, at the end of 2Q22, **40% of new terminals are smart gadgets** while feature and basic phones account for 60% of all network connected devices.

As of June 2022, the total number of internet enabled gadgets connected to the networks stands at **10.9 million gadgets** while the count of feature phones and basic phones connected to the network had grown to 25 million gadgets.



BASIC MOBILE PHONE

Can make calls and send text messages

Monthly Users

2Q22	3.71M
1Q22	3.63M
4Q21	3.53M
3Q21	3.55M



FEATURE PHONES

Can make and receive calls, send text messages and provide some of the advanced features found on a smartphone.

Monthly Users

2Q22	21.48M
1Q22	20.92M
4Q21	20.52M
3Q21	19.85M



SMARTPHONES

A class of mobile phones and of multi-purpose mobile computing devices. They are distinguished from feature phones by their stronger hardware capabilities and extensive mobile operating systems, which facilitate wider software, internet (including web browsing over mobile broadband), and multimedia functionality (including music, video, cameras, and gaming), alongside core phone functions such as voice calls and text messaging.

Monthly Users

2Q22	10.92M
1Q22	10.48M
4Q21	10.1M
3Q21	9.39M

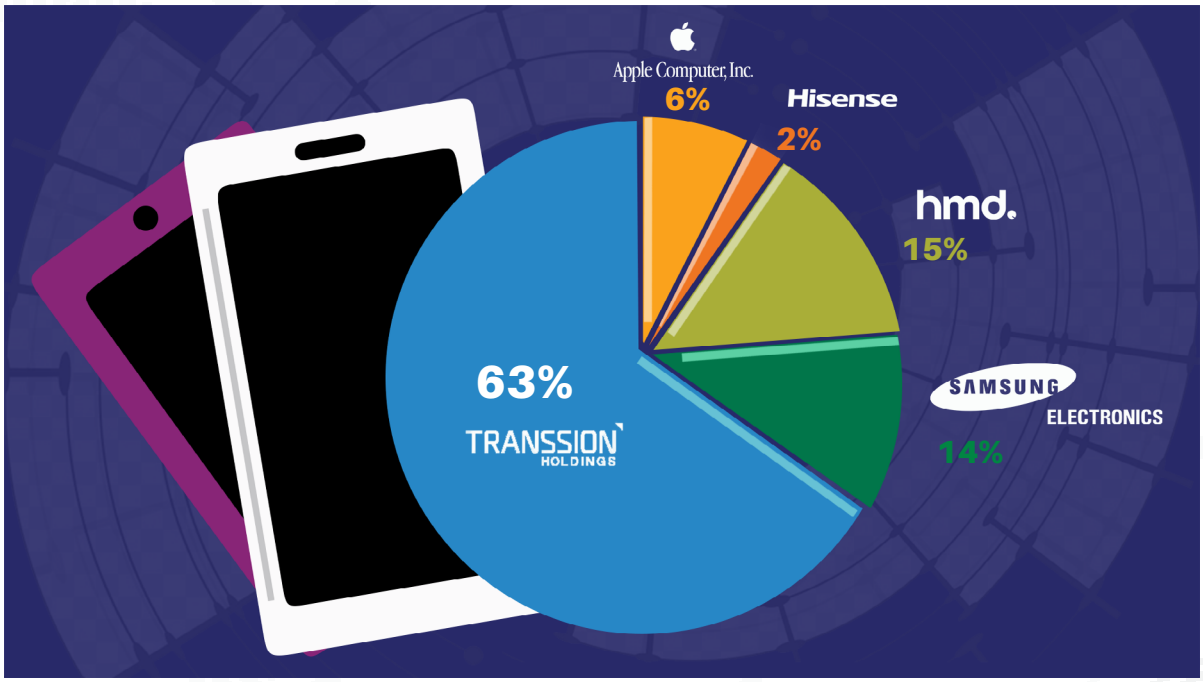
Device Approvals

For the three months ending June 2022, UCC approved the sale and distribution of 52 phone models from a host of different distributors in the country. These include brands like Apple, Hisense, Nokia, Benco, Samsung, among others.

Manufacturer	Brand	Model
Apple Computer, Inc.	Apple	A2588
	Apple	A2589
	Apple	A2783
Hisense	Hisense U963	HLTE100E
hmd.	Nokia	Nokia TA1352
	Nokia	Nokia TA1332
	Benco	Benco Lava E10
	Nokia	Nokia TA1418
	Nokia	Nokia TA1397
	Nokia C2 second edition	Nokia C2 second edition -TA-1468
	Nokia C21 Plus	Nokia C21 plus TA-1433
	P38 Pro (64+2)	P682L
SAMSUNG ELECTRONICS	SAMSUNG GALAXY A22 Ultra	SM-S908E/DS
	SAMSUNG GALAXY A22+	SM-S906E/DS
	A53	SM-A536E/DS
	A33	SM-A336E/DS

Manufacturer	Brand	Model
SAMSUNG ELECTRONICS	SAMSUNG GALAXY A22 Ultra	SM-S908E/DS
	SAMSUNG GALAXY A22+	SM-S906E/DS
	A53	SM-A536E/DS
	A33	SM-A336E/DS
	SAMSUNG GALAXY A23	SM-A235F/DS
	A22	SM-S901E/DS
	SAMSUNG GALAXY A13	SM-A135F, SM-A135F/DS
TRANSSION HOLDINGS	TECNO T475	T475
	TECNO POP 5 Pro	BD4j
	TECNO TR109	TR109
	TECNO TR210	TR210
	TECNO TR215	TR215
	TECNO SPARK 8C	KG5j
	TECNO T101	T101
	Camon 19 (128+6)	C16
	Camon 19 Pro (256+8)	C18
	Note 12	X670
	HOT 12 Play	X6816C
	Note 12i	X6819
	P17 Pro (32+2)	A551L
	SMART 5 (32+2)	X657C
	HOT 10i (64+)	X658E
	it5081	it5081N
	it5626	it5626N
	it2160	it2160
	it2173N	it2173N
	it2163	it2163
	POVA NEO (64+4)	LE6h
	SMART6 (32+2)	X6511B
	SMART6 Plus (32+2)	X6511G
	SMART6 (32+2)	X657
	HOT12i (64+2)	X665
	HOT12i (64+3)	X665B
	HOT 12 (128+4)	X6817
	HOT 11 Play (128+4)	X689F
	itel P17 Pro	P552W
	itel A58 Pro	A661WP
	POP 6 Go (32+2)	BE6
	POP 5 pro (32+2)	BD4h
	POP 6 (32+2)	BE7

During the quarter, Transsion brands and sub brands of Infinix, iTel, Tecno, and Camon accounted for **63% of newly approved devices** by the UCC. Thirty three (33) Transsion brand series were approved for use in Uganda during the quarter.



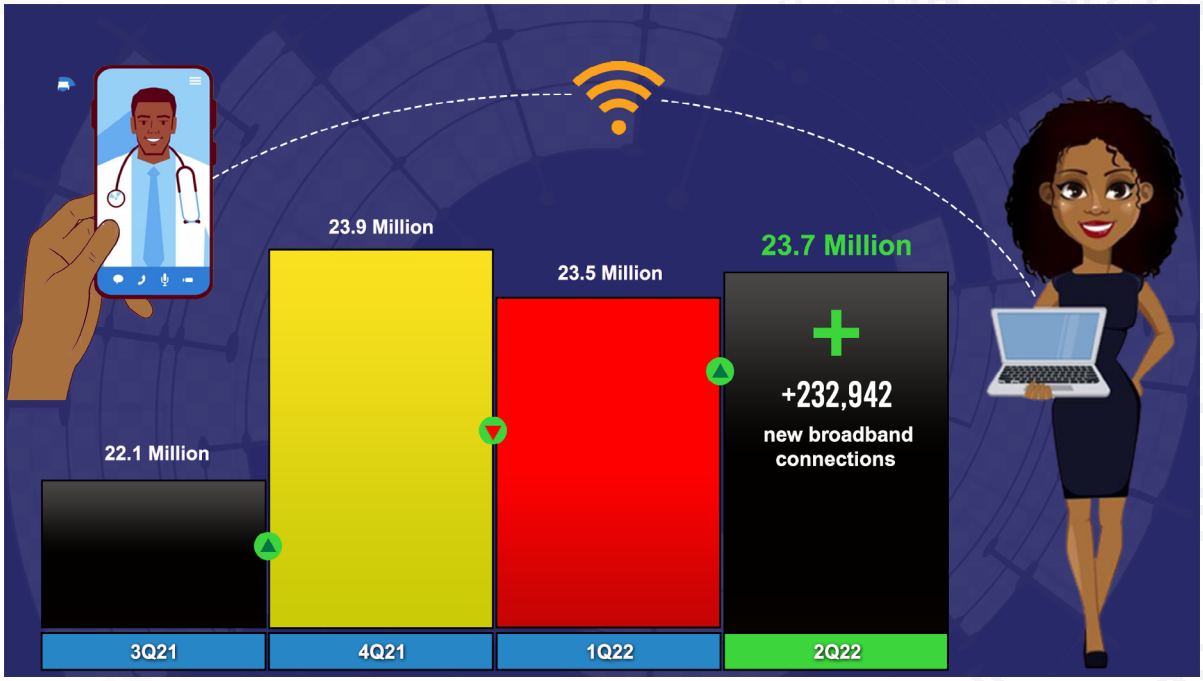
3.3. Broadband Connections

In the months April to June 2022, the sector recorded a total of 232,000 new broadband subscriptions. This brought the total number of broadband connections to 23.7 million broadband subscriptions.

The 232,000 new broadband connections are 34% of total new telephone connections.

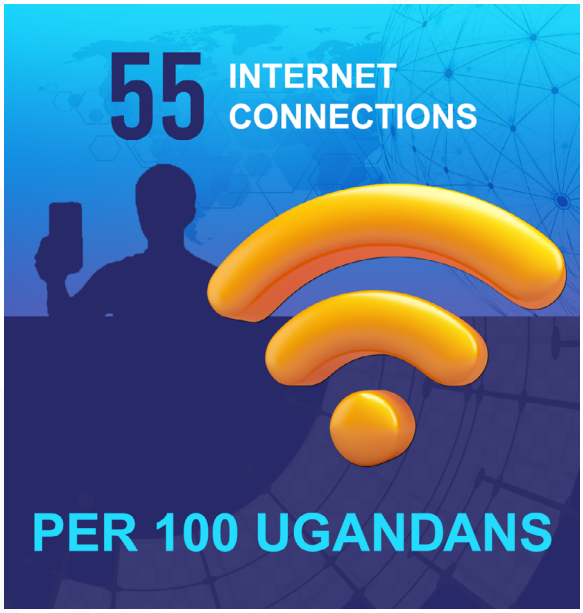
The growth in new broadband connections may be attributed to new smartphone promotional device activity during the quarter.

It was also noted that the 34% growth in broadband connections matches the observed drop in feature devices. This might be indicative of a direct customer migration from feature to smart devices.



On a year-on-year comparison, the twelve months ended June 2022 recorded 1.9 million new broadband subscriptions. This is an 8% year-on-year growth in broadband subscriptions equaling the 8%-year growth in total mobile connections recorded during the same period.

In terms of penetration, the 23.7 million broadband subscriptions translate into a broadband penetration of **55 internet connections** for every 100 Ugandans.



3.4. Mobile and Electronic Money Subscriptions

Digital financial services remain the main driver of financial inclusion in Uganda with a total of **40.7 million digital wallets** recorded at the end of June 2022.

Of the 40.7 million digital wallets, 36.9 million wallets were MNO-mobile money wallets linked to MTN, Airtel and UTL.

Non-MNO linked digital wallets accounted for 10% of total wallets with a total count of 3.8 million wallets administered by licensed non-MNO Payment Service Providers.



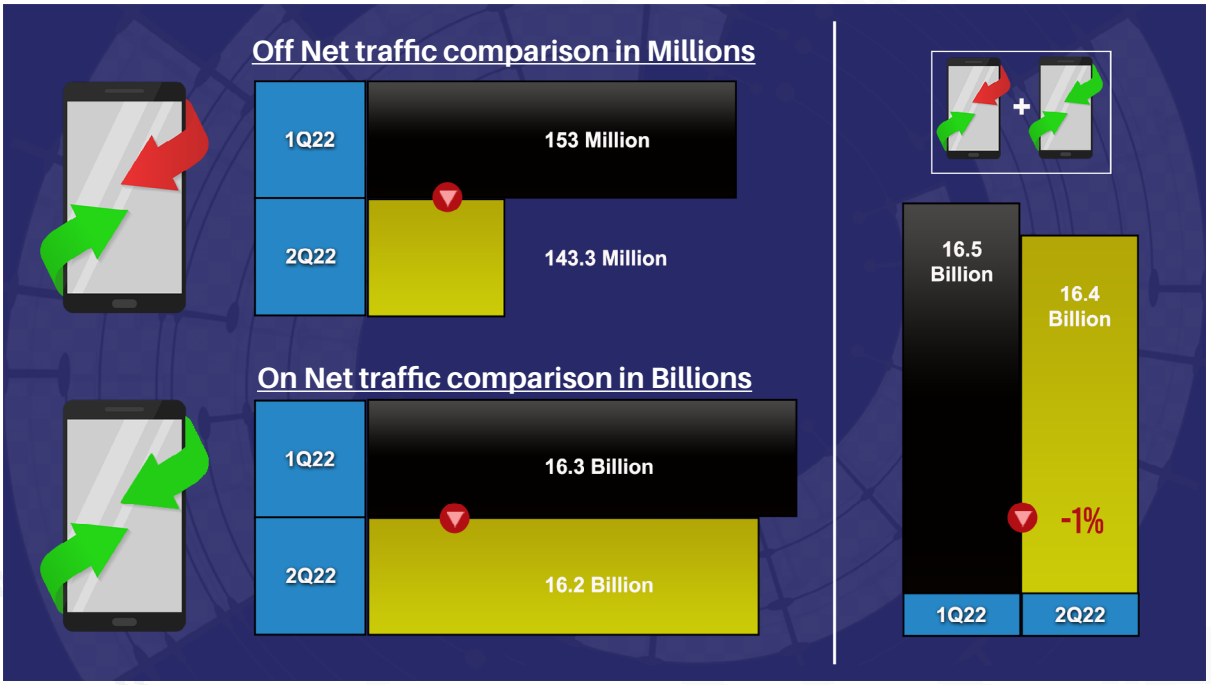
Traffic and Pricing



4.1 Domestic Voice Traffic

The domestic voice market realised relative stability with a total of **16.4 billion domestic minutes** carried by the local networks.

Out of the 16.4 billion domestic minutes, 16.3 billion were domestic on net traffic (Minutes of calls within the same network), while 143 million domestic offnet (interconnect) minutes were recorded during the period April to June 2022.

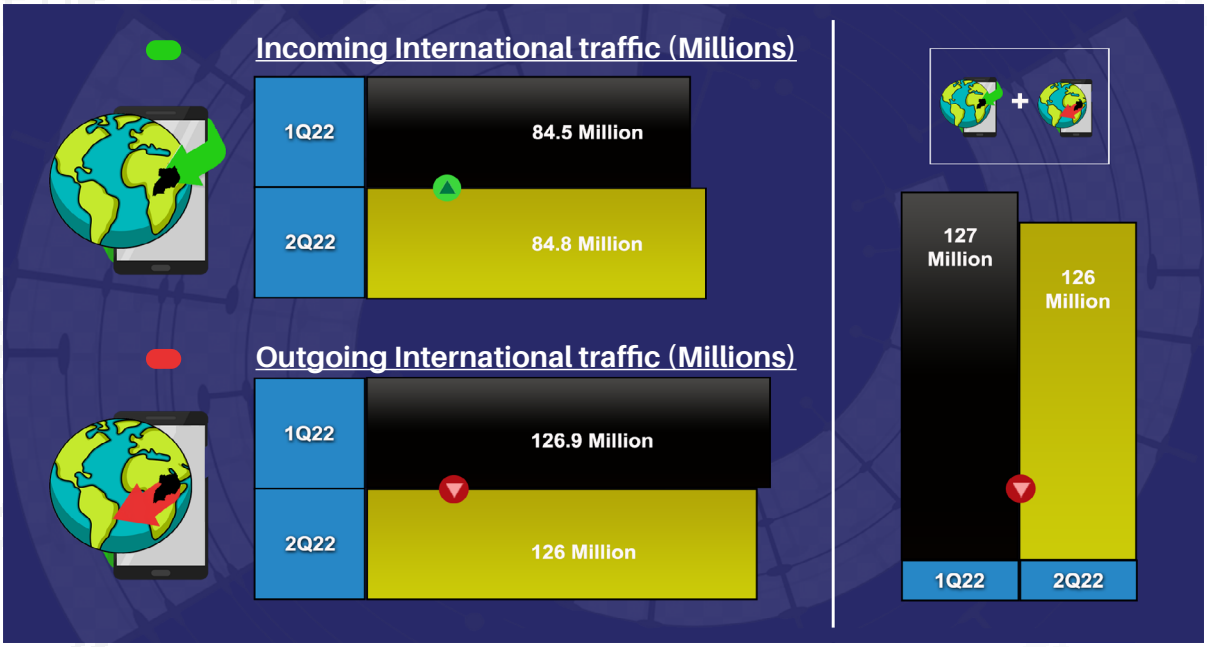


On a year-on-year comparison, the 16.4 billion domestic call minutes translate into a 1% decrease in comparison with 1Q21.

4.2. International voice traffic

Similar to domestic voice traffic, international traffic category remained stable during 2Q22 with a total of **126 million international minutes** compared to 126.9 million minutes handled by the networks during 1Q22.

Uganda yet again remains a marginal net traffic recipient with **84.8 million incoming minutes** compared to 84.5 million outgoing minutes.



The ONA (One Network Area) partner states of Kenya, South Sudan and Rwanda accounted for a total of 96.2 million minutes during the quarter. This is 76% of total international traffic through Ugandan telephone networks.

In terms of regional traffic balance, Uganda received 64.5 million incoming ONA minutes compared to 31.7 million outgoing minutes to ONA member states.

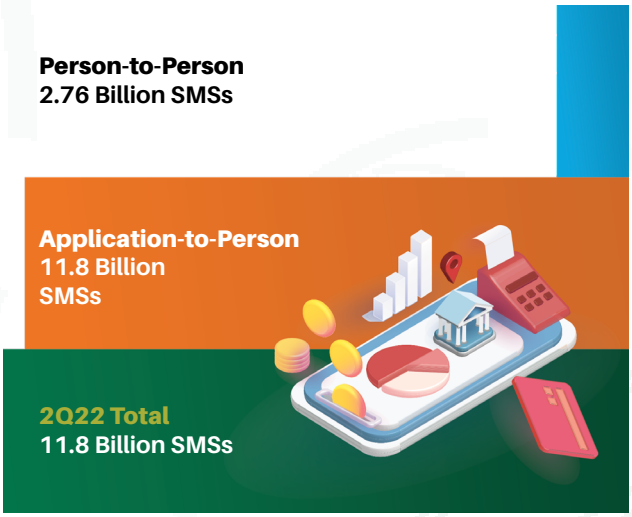
4.3. SMS (Short Message Service) and USSD (Unstructured Supplementary Service Data) Traffic

SMS Traffic:

SMS remains the foundational communication channel for Digital Financial Services (DFS) as the channel is used for delivery of key DFS messaging.

In 2Q22, the networks processed a total of **11.8 billion SMSs**, 9.01 billion of which were Application-to-Person (A2P) Messages largely associated with DFS.

A total of 2.76 billion messages were Person-to-Person (P2P) Messages 99% of which were intra-network (on-net) messages.

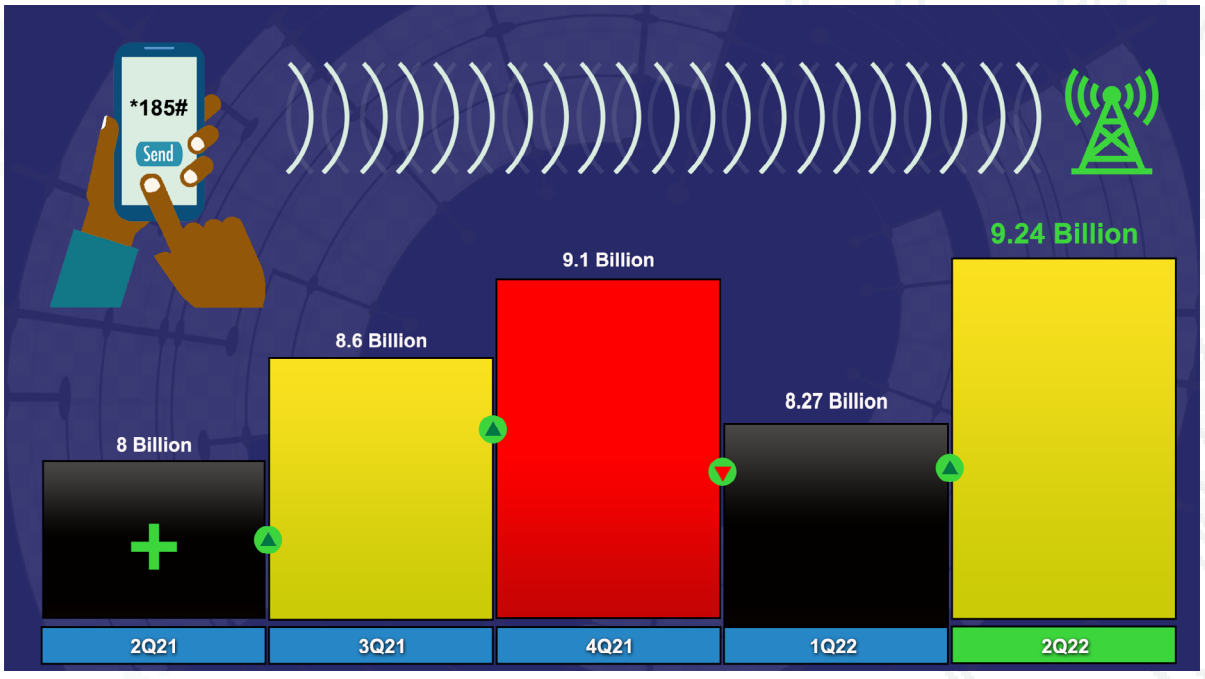


USSD Traffic:

USSD sessions during the quarter increased by more than 1 billion sessions from 8.27 billion sessions in 1Q22 to 9.24 billion sessions in 2Q22.

On a year-on-year comparison, this is a 15.27 % growth in USSD sessions between 2Q21 and 2Q22.

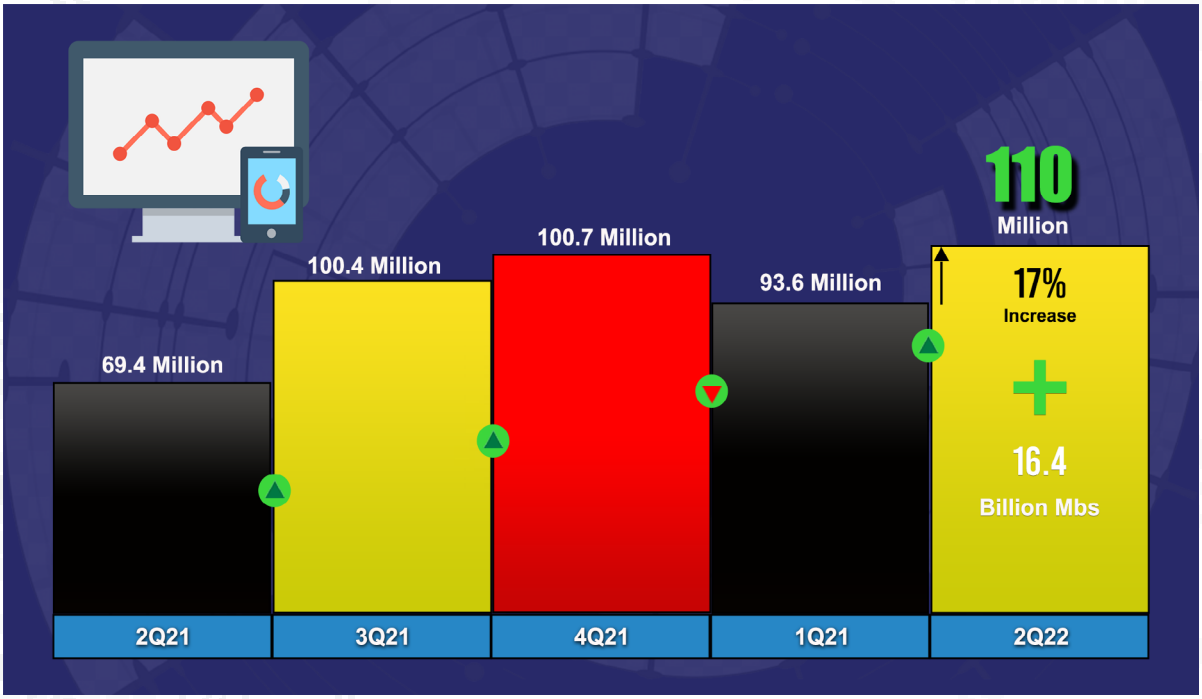
USSD sessions remain largely driven by payments, digital financial services and increasing use case from betting and digital based games of chance.





4.4. Broadband Traffic

2Q22 posted the highest volume of internet traffic recorded in a quarter. The **110 billion MBs** of internet traffic represents a **17% increase** from the **93.62 billion MBs** recorded in 1Q22.



This growth is largely indicative of increased broadband usage rather than increases in broadband subscriptions. In percentage terms, the growth in internet traffic is 17 times the growth in broadband subscriptions realised during the quarter.

In terms of distribution, the mobile/wireless internet connections accounted for 102 billion MBs while fixed internet connections accounted for 7.75 billion MBs.

The growth in internet usage may to some extent account for the stability/stagnation in traditional voice traffic as consumer behaviour gradually changes to data led consumption patterns.

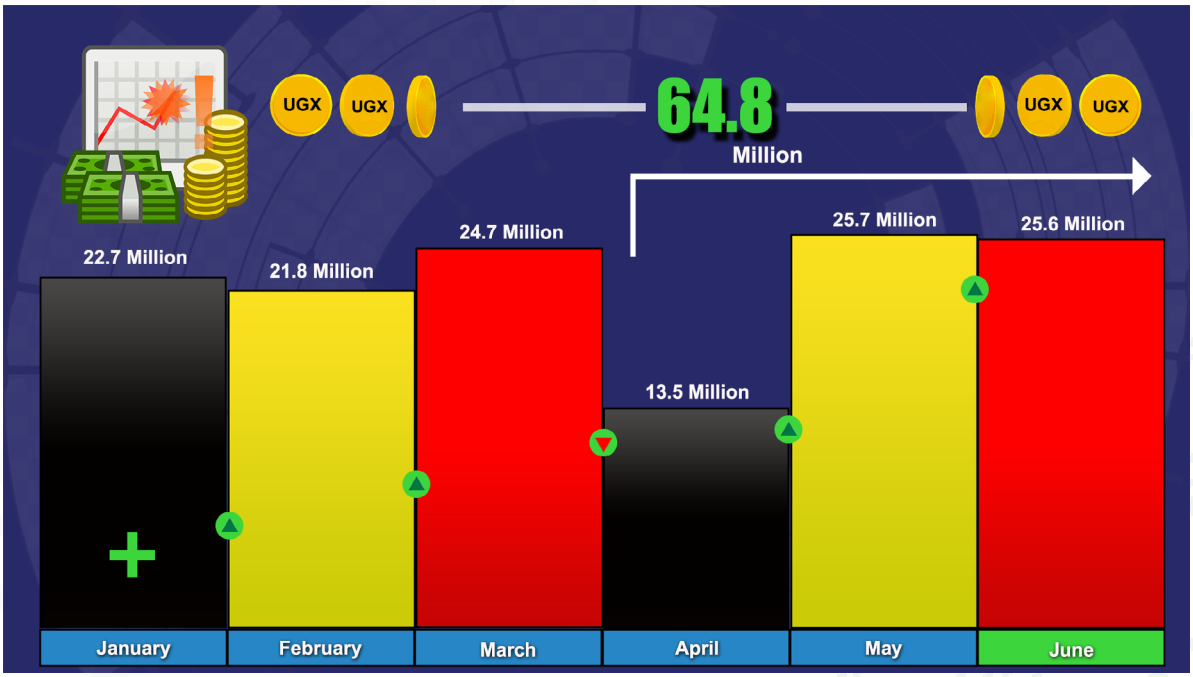
Further, the internet traffic growth is attributed to growth in streaming services.

On a year-on-year comparison, the record growth translated into a 60% growth in traffic between 2Q21 and 2Q22.

4.5. Mobile Money Transactions

Domestic P2P Transfers:
In terms of mobile money activity, the quarter posted a total of **64.8 million P2P transfers** across domestic digital mobile money wallets.

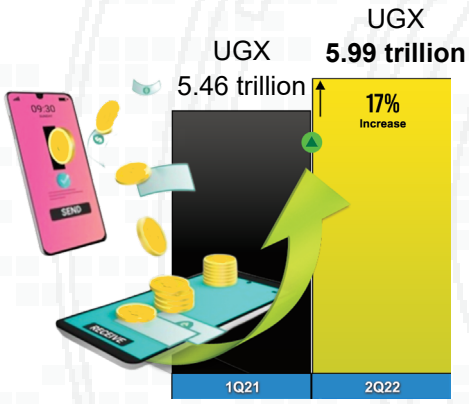
In terms of monthly averages, the sector recorded an average of 21.6 million P2P transfers during the quarter.



Source:BOU
Monthly transactions on mobile money Jan-June 2022.

Despite the fall in number of transactions, the value of P2P transactions grew from UGX 5.46 trillion in 1Q22 to UGX **5.99 trillion** in 2Q22.

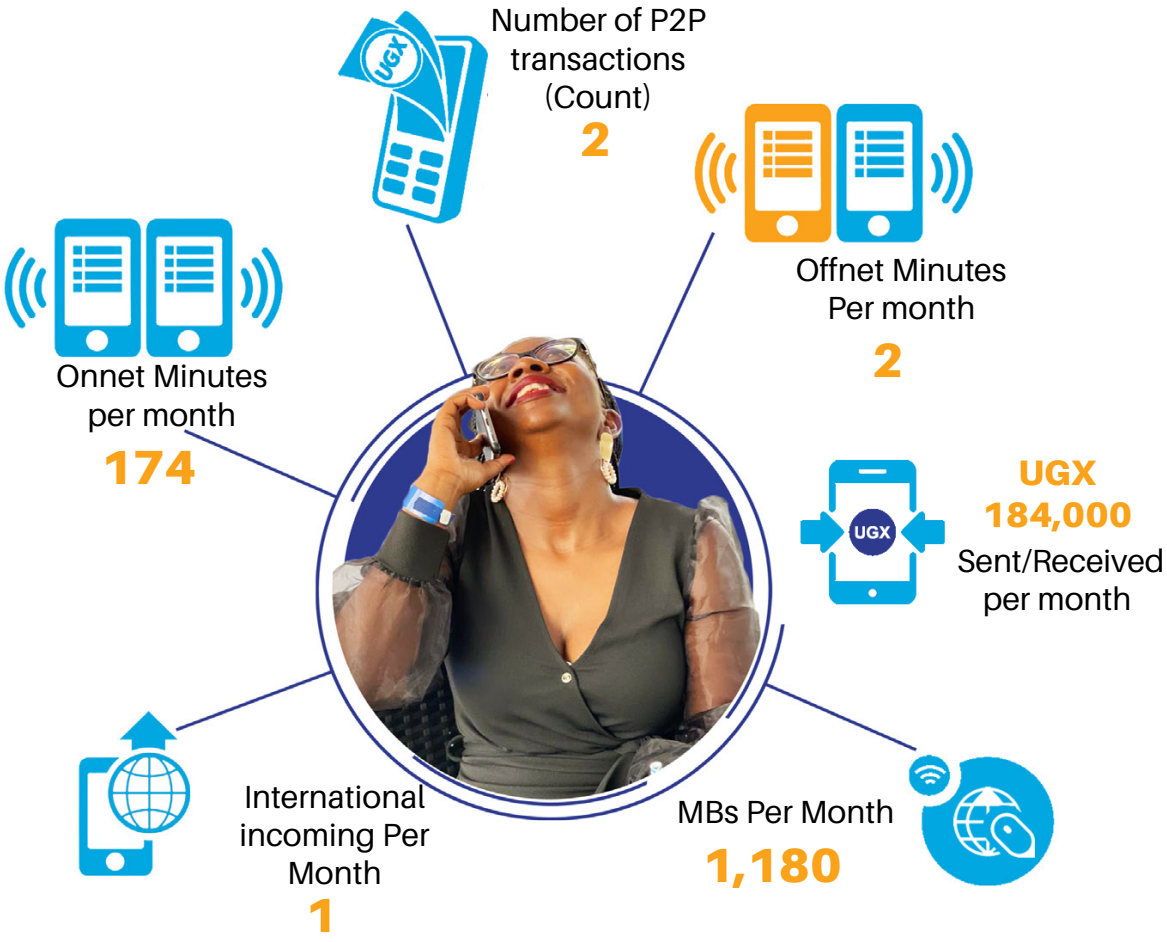
This translates into a 17% growth in average value of P2P transfers from UGX 78,000 to UGX 92,000 in 2Q22.



4.6. International Mobile Money Transfers

International MM transfers			
		2Q22	1Q22
Number of transactions (count)	In	1.34M	1.2M
	Out	0.21M	0.3M
Value of transactions	In	468.18 Bn	527.97 Bn
	Out	38.39 Bn	22.74 Bn

2Q22 Average Monthly User Profile



Campaigns and Products



5.1. MTN Kabode

During the quarter, MTN in partnership with global handset manufacturer iTel (Transsion) launched the Kabode Supa smartphone under its device financing scheme. The Kabode is a 5-inch screen phone with 3GB RAM, 8GB Memory and a 2 Megapixels front camera.



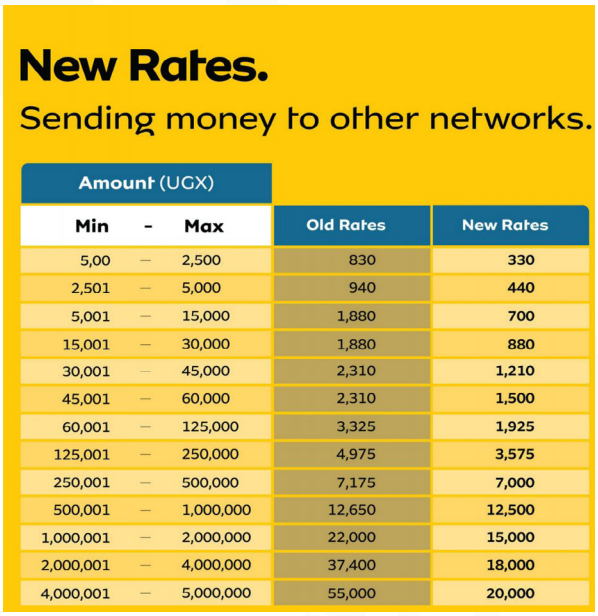
MTN customers can get the phone with a down payment of **UGX 99,000/=** and thereafter instalments of either UGX 6,250/= per week or UGX 25,000/= per month for 6 months.

5.2. Networks revise Mobile Money Rates

In a market first, the quarter saw Airtel Money and MTN Mobile Money review their cross network P2P remittance charges to equalise them across the two networks.

Cross Network Transfer Rates, April 2022 (UGX)				
	MTN		Airtel	
Band	Pre April 2022	Post April 2022	Pre April 2022	Post April 2022
5,001-15,000	1,880	700	1,975	700
15,001-30,000	1,880	880	2,165	880
45,001-60,000	2,310	1,500	2,595	1,500
60,001-125,000	3,325	1,925	3,765	1,925
250,001-500,000	7,175	7,000	8,025	7,000
1,000,001-2,000,000	22,000	15,000	26,500	15,000
4,000,001-5,000,000	55,000	20,000	45,400	20,000

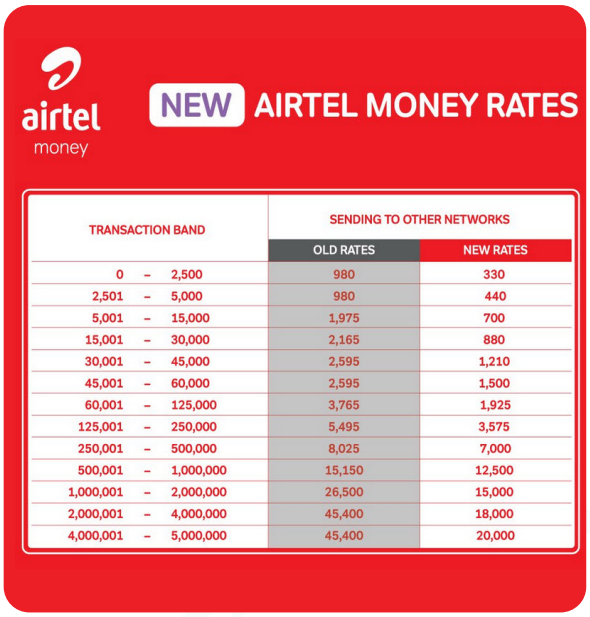
Comparative cross network P2P Remittance Charges April 2022



New Rates.

Sending money to other networks.

Amount (UGX)				
Min	-	Max	Old Rates	New Rates
5,00	–	2,500	830	330
2,501	–	5,000	940	440
5,001	–	15,000	1,880	700
15,001	–	30,000	1,880	880
30,001	–	45,000	2,310	1,210
45,001	–	60,000	2,310	1,500
60,001	–	125,000	3,325	1,925
125,001	–	250,000	4,975	3,575
250,001	–	500,000	7,175	7,000
500,001	–	1,000,000	12,650	12,500
1,000,001	–	2,000,000	22,000	15,000
2,000,001	–	4,000,000	37,400	18,000
4,000,001	–	5,000,000	55,000	20,000



airtel money

NEW AIRTEL MONEY RATES

TRANSACTION BAND			SENDING TO OTHER NETWORKS	
			OLD RATES	NEW RATES
0	–	2,500	980	330
2,501	–	5,000	980	440
5,001	–	15,000	1,975	700
15,001	–	30,000	2,165	880
30,001	–	45,000	2,595	1,210
45,001	–	60,000	2,595	1,500
60,001	–	125,000	3,765	1,925
125,001	–	250,000	5,495	3,575
250,001	–	500,000	8,025	7,000
500,001	–	1,000,000	15,150	12,500
1,000,001	–	2,000,000	26,500	15,000
2,000,001	–	4,000,000	45,400	18,000
4,000,001	–	5,000,000	45,400	20,000

5.3. Roke Telkom Zero Rates Netflix streaming

As video streaming applications become a major customer retention driver, the market saw Roke Telkom zero rate traffic from Netflix a popular subscription-based streaming application. This market first means that Roke Telkom subscribers on its Classic Plus and Unlimited Plus Data plans would enjoy Netflix movies at no extra data cost.





5.4. MTN launches the Manda Mobile

In June 2022, MTN launched a digital-only mobile sub brand code named Manda Mobile. The sub brand targeted at a largely youthful digital market segment can only be serviced through mobile money and MTN's digital channels.



Manda Mobile has bundle-only value propositions with no out-of-bundle voice and data offers. Manda Mobile SIM cards are retailing at **UGX 5,000** at select MTN stores around Kampala while the app is available at: https://apps.apple.com/tr/app/manda-app/id1619977657

5.5. Comparing One Day Voice Bundles, June 2022

1-Day Valid UGX 500 Voice Bundles, June 2022	Airtel - Kawa	UTL- Endobo 24hrs	MTN-Daily Voice Bundle
Price (UGX)	500	500	500
On Net Voice Minutes	10	Unlimited	5
Off Net Voice Minutes	0	0	1
Validity	Midnight (12:00am)	24 hours (all day)	24 hours (all day)
How to Buy	*149*4#	*100*1# or *165#	*160*2*1#

UGANDA COMMUNICATIONS COMMISSION

1-Day Valid UGX 1,000 Voice Bundles, June 2022	Airtel - Pakalast	MTN - 20 mins Daily Voice Bundle
Price (UGX)	1,000	1,000
On Net Voice Minutes	30	17
Off Net Minutes	0	3
Validity	24 hrs	24 hours
How to Buy	*149*2#	*160*2*1#

UGANDA COMMUNICATIONS COMMISSION

1-Day Valid UGX 2,000 Voice Bundles, June 2022	Airtel - Daily 100mins	MTN - 60 Mins Daily Voice Bundle
Price (UGX)	2,000	2,000
On Net Voice Minutes	100	55
Off Net Minutes	0	5
Validity	24 hrs	24 hours
How to Buy	*149*6*11#	*160*2*1#

UGANDA COMMUNICATIONS COMMISSION

Comparing Monthly Voice-Only Bundles, June 2022

30-Day Valid Voice-Only Bundles, June 2022	On-net Mins	
UGX 5,000	125	125
UGX 10,000	300	300
UGX 30,000	N/A	2,000
UGX 35,000	2,400	N/A
UGX 50,000	4,500	4,500
How to Buy	*160*2*1#	*149*6#

UGANDA COMMUNICATIONS COMMISSION

Comparative out-of-bundle Voice Rates, June 2022

30-Day Valid Voice-Only Bundles, June 2022	On-net Mins	
On net (UGX)	4	4
Off-Net (UGX)	4	4

UGANDA COMMUNICATIONS COMMISSION

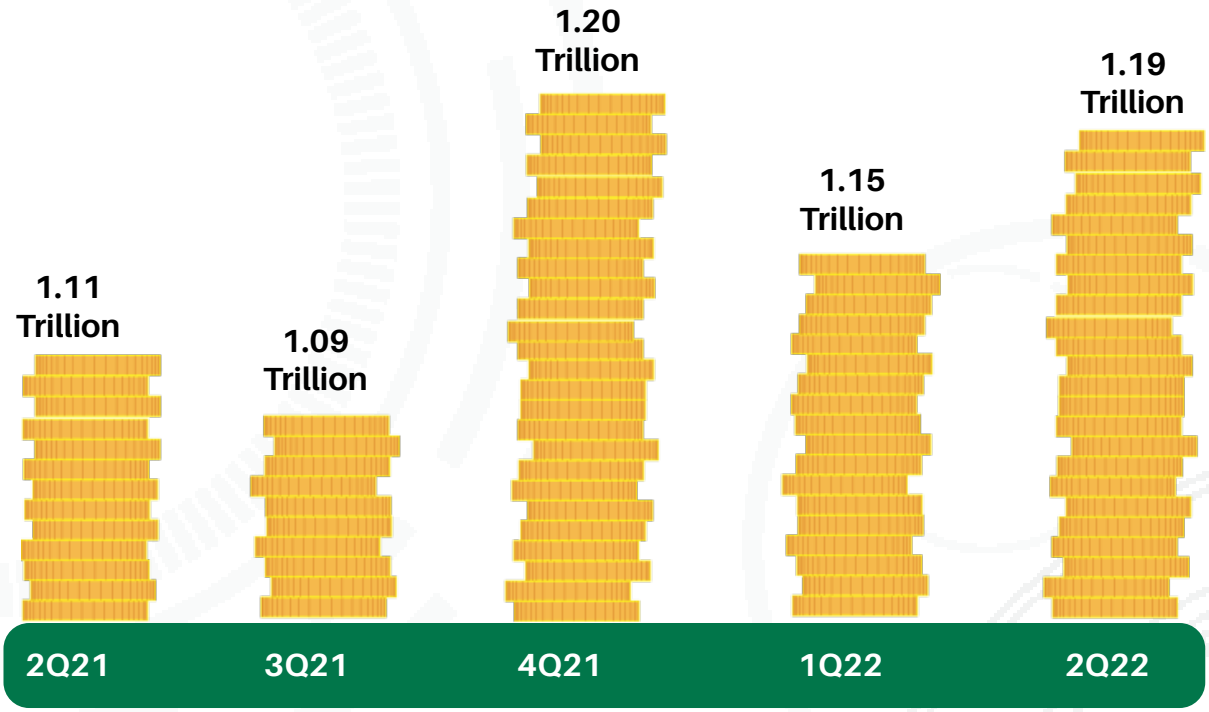
Financial Highlights



6.1. Telecom Revenues

The industry has yet again grossed more than **1 trillion shillings** in quarterly revenues. The three months ending June 2022 posted a 4% growth in revenue from 1.15 trillion in March 2022 to **1.19 trillion** in June 2022.

The growth in revenue was driven by increase in earnings from data, tower leases and other service lines including, voice as well as device sales. This excludes mobile financial service revenue.



The 2Q22 performance brings the industry's gross revenues for the FY 21/22 to an estimated UGX 4.6 trillion.

The 2Q22 performance translates into a UGX 81.5 billion growth in revenues between 2Q21 and 2Q22. This is a 7% annual growth.

6.2. Interconnect Revenues

The industry saw marginal improvements in the net international interconnect position with total revenue growing to UGX 27.5 billion and outbound interconnect payments staying at UGX 16.8 billion.

This leaves the country with a net international interconnect position of UGX 10.7 billion up from 9.7 billion in 1Q22.



	Revenue	Expenses	Net
3q21	26,208,763,843	17,241,219,305	8,967,544,538
4q21	27,258,220,806	17,346,914,187	9,911,306,619
1q22	26,569,649,084	16,871,491,376	9,698,157,708
2q22	27,534,838,093	16,797,105,632	10,737,732,461

Post and Courier



7.1. Pan African Postal Policy Dialogue

During the quarter, African Postal Policy Makers, Regulators, Operators and Service Providers held the Annual Pan Africa Postal Union (PAPU) ordinary session for the Administrative Council.

In the 40th annual forum held in Kinshasa Democratic Republic of Congo (DRC), the PAPU Administrative Council (in which Uganda Chairs the Strategy Committee) reviewed and made recommendations on regional positions regarding:

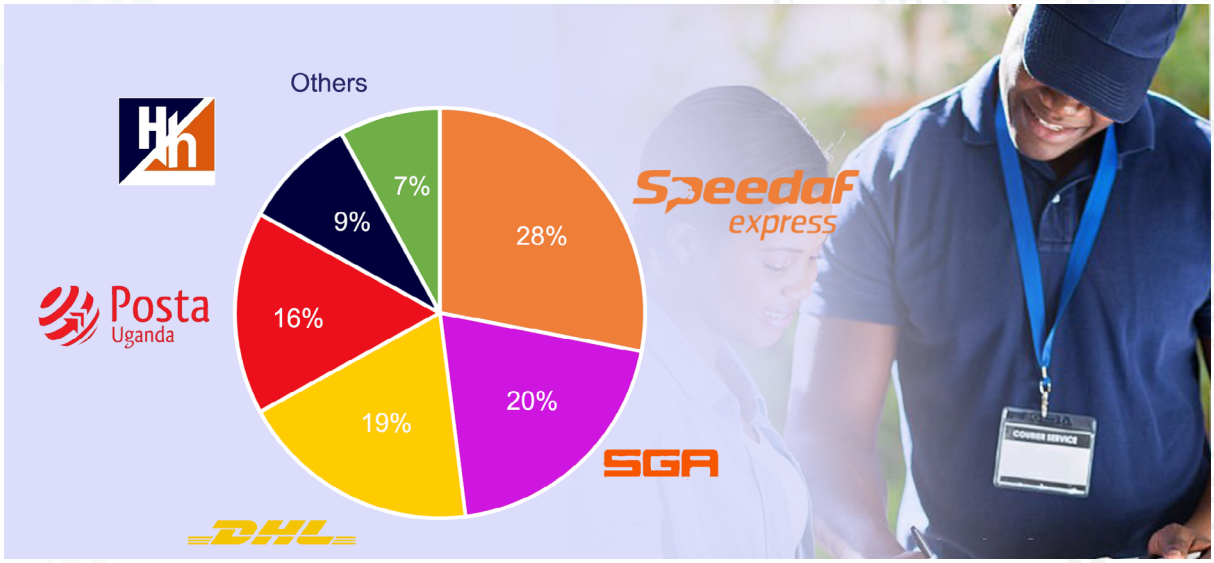
- Postal Finance
- Physical and Digital Transformation
- The Post and e-commerce
- Strategic Partnerships and collaborations,
- Infrastructure sharing,
- Universal Postal Service Obligations(USO)
- Strategies aimed at promoting the postal sector reforms

The forum further discussed strategies on how Post can be leveraged to support the region's attainment of the UN Sustainable Development Goals (SDGs).



Source: PAPU

In the period ending June 2022, the domestic mail volume deliveries were distributed across different post & Courier operators as follows. Speedaf- 28%, SGA (Big Orange)- 20%, DHL- 19%, UPL- 16%, Hesed Holdings- 9% while others contributed 7%.

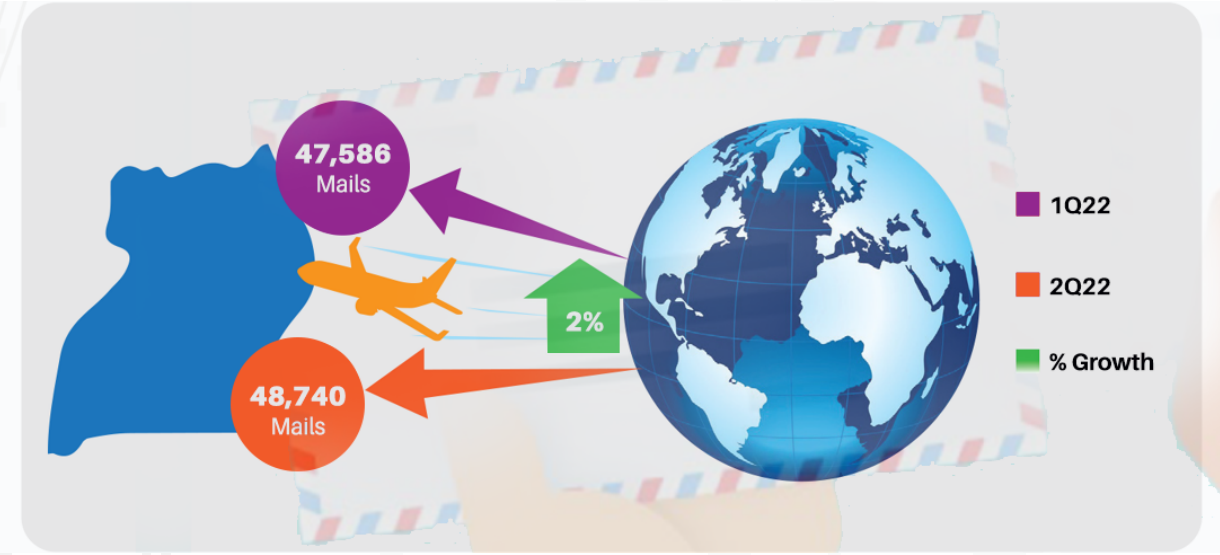


7.2. Rest of the World mail volumes

Inbound Mail Volumes

In 2Q22, the volume of mails Uganda received from other countries grew to **48,740 mails** from 47,586 mails in 1Q22, translating into a 2% quarter on quarter growth.

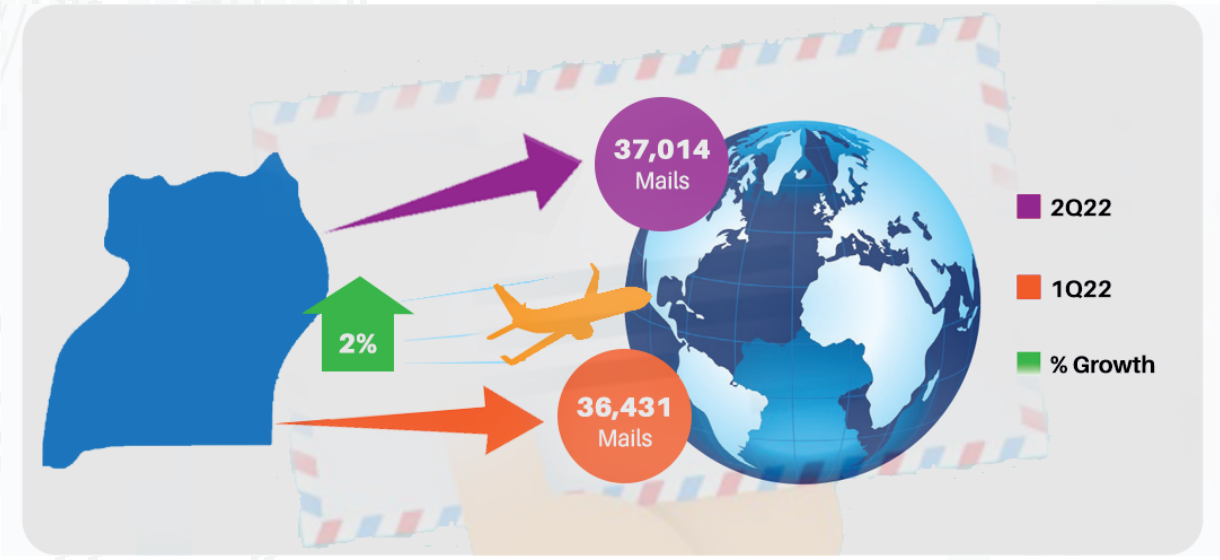
In terms of a year-on-year comparison, the Post & Courier market grew by about 10,000 mail deliveries translating into a 25% annual growth. Further, this is attributed to the further improvements done in digitizing of the courier business processes.



Out Bound Mail Volumes

Rest of the world out bound mail volumes grew to **37,014 mails** in 2Q22 from 36,431 mails in 1Q22 translating into a 2% quarter on quarter growth.

Though the inbound mail volumes have continued to dominate over the outbound mail volumes, the growth rate has remained the same in both aspects in 2Q22.



Broadcast and Multimedia



8.1. Uganda Film Festival

The 2nd quarter of 2022 saw the peak of the 9th Uganda Film Festival Awards. The annual event ended with an award ceremony during which winners from 23 film categories were presented with different awards from over 280 movie entries. The award categories included:

1. Films in the subcategories Student Film, Short Film, East African, International Film
2. Documentaries
3. TV Drama Series
4. Directors
5. Animations
6. Post Production Editing
7. Screenplays
8. Sound Designs in scripted movies
9. Cinematography
10. Costume Design
11. Best Feature and Viewer's choice film
12. Production Design
13. Local and Indigenous films
14. Best Actors and Supporting Actors in different subcategories namely Series, Feature Film
15. Best Actresses and Supporting Actresses in different subcategories namely Series, Feature Film

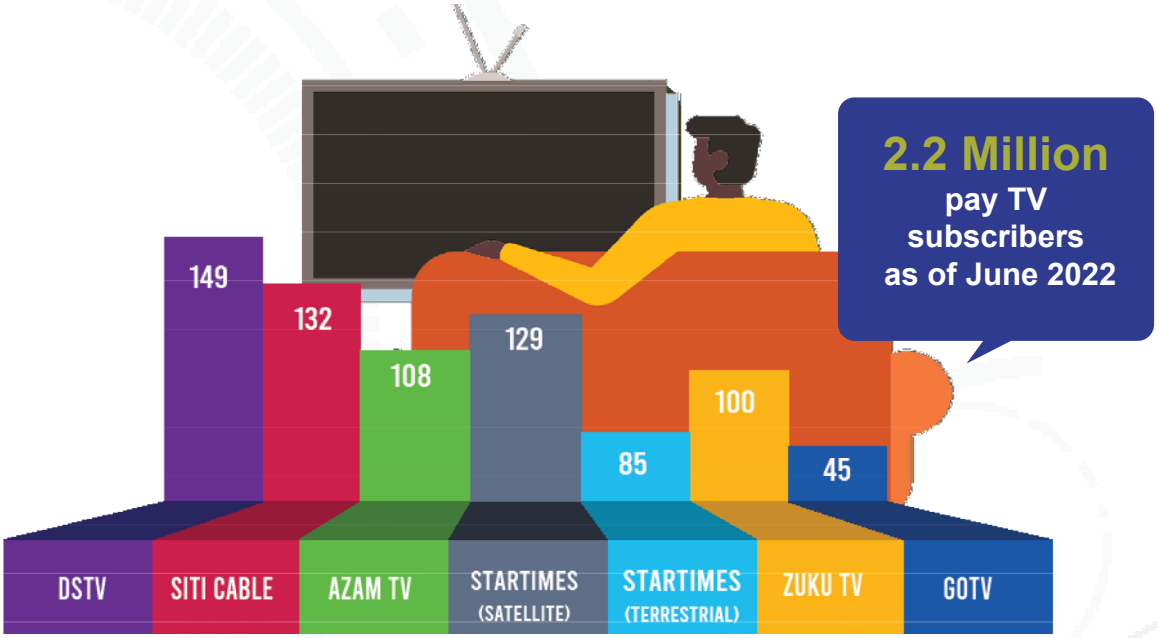






8.2. Pay TV Subscriptions

2Q22 has seen an increase in the total active subscribers from a total of 1.45 million as of March 2022 to 2.2 million in June 2022.



8.3 Value Bouquet Prices as of June 2022

Value Bouquet Prices			
Station	Bouquet	Price (UGX)	Channels
DSTV	Access	39,000	75
SitiCable	Ugandan	15,000	80
Go TV	GoTV Lite	14,000	20
StarTimes (Sattelite)	NOVA	13,500	31
StarTimes (Terrestrial)	NOVA	12,000	54
Zuku TV	Smart	12,000	53
Azam TV	Azam Pure	10,000	68

ii.) Premium Bouquet Prices as of June 2022

Premium Bouquet Prices			
Station	Bouquet	Price (UGX)	Channels
DSTV	Premium	255,000	140
SitiCable	Asian	85,000	142
Go TV	Chinese	80,000	21
StarTimes (Sattelite)	GoTv Max	45,000	40
StarTimes (Terrestrial)	Asian Stand Alone	39,000	79
Zuku TV	Azam Play	37,000	128
Azam TV	Classic	28,000	14