UGANDA
COMMUNICATIONS
COMMISSION

Market Performance Report

3Q22

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

The name 'Kampala' comes from 'Impala', a type of antelope which used to graze on the slopes of Mengo.

They are an integral part of Uganda's vibrant wildlife in conservation areas like: Queen Elizabeth National Park, and Murchison Falls National Park among others.

Introduction

This is a review of the industry performance, trends and key developments for the quarter starting July to September 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

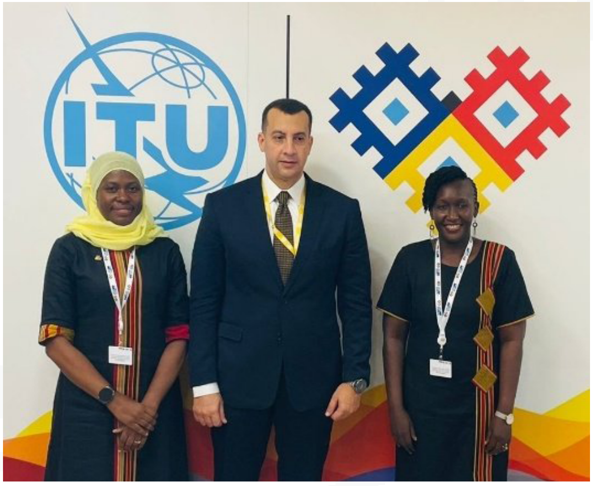
Global Context

1.1. ITU Council and Plenipotentiary Conference Bucharest, 2022

On the global ICT policy front, the highlight of 3Q22 was the opening of the ITU Plenipotentiary Conference in Bucharest, Romania. The quadrennial conference is the top policy and strategy-making forum of the 193-membership of the International Telecommunications Union.

In this forum, the ITU membership sets the Union's general policies, adopts four-year strategic and financial plans, and elects the senior management team that includes the Secretary-General, Deputy Secretary General as well as the Sector Directors (Development - BDT, Radio, and Standards - TSB).

From the Management Elections, Ms. Doreen BOGDAN-MARTIN (USA) was elected ITU Secretary-General, deputized by Mr. Tomas LAMANAUSKAS (Lithuania). Dr. Cosmas ZAVAZAVA (Zimbabwe) and Mr. Seizo ONOE (Japan) assumed leadership of the Development and Standardization Bureaux respectively.



Dr. Aminah Zawedde - PS. Ministry of ICT&NG (L), and Eng. Irene Kaggwa Sewankambo - ED Uganda Communications Commission (R) at the ITU Council.

Hon.Dr.Chris Baryomunsi - Minister of ICT & NG (L), leads a delegation from Ministry of ICT&NG, Ministry of Foreign Affairs and the Uganda Communications Commission.

The highlight for Uganda was our re-election to the ITU Governing Council to represent the D-Region (Africa), along with Algeria, Egypt, Ghana, Kenya, Mauritius, Morocco, Nigeria, Rwanda, Senegal, South Africa, Tanzania, and Tunisia.

Uganda is now a 3-term member of the ITU Council.

Hon.Dr.Chris Baryomunsi - Minister of ICT&NG (L), and Dr. Aminah Zawedde - PS. Ministry of ICT&NG (R), at the ITU Council.

1.3. Kenya's John Omo Re-elected as ATU Secretary General

On a regional ICT Policy front, 3Q22 saw Africa hold the 6th ATU Conference of Plenipotentiaries (CPL-22) in Algiers, Algeria. The ATU CPL is a quadrennial forum in which ATU member states elect the ATU secretariat (including the Secretary General) and the Administrative Council.

AFRICAN TELECOMMUNICATIONS UNION
UNION AFRICAINE DES TÉLÉCOMMUNICATIONS

At the 6th ATU CPL, Kenya's John Omo was re-elected to the office of ATU SG for a second term.

1.3. EU Telecom Companies lobby for Network Finance from Over-the-Top Applications

In yet another industry push for OTTs to finance Telecommunication Network build and maintenance costs, more than 15 European Network Operators, through their umbrella association ETNO, have called on the big tech players to finance network maintenance overheads in view of their growing and skewed growth in Network internet traffic.

At the inaugural FT and ETNO Politics and Tech Forum in September 2022, European Operators that included BT, Vodafone, and Deutsche Telekom in a joint statement called on tech firms such as Netflix, Amazon, Meta, and Google to play a bigger role in the financing of Network management costs fuelled by the Global Streaming and Internet boom. In the statement, the network operators claimed that more than half of global internet traffic is attributed to six (6) Silicon Valley companies – Google, Facebook, Netflix, Apple, Amazon, and Microsoft and this rises to as much as 80% when gaming giants are included.

These assertions are similar to the Korea Telecom Push for Netflix to support infrastructure build and maintenance costs following the Internet traffic surge experience after the launch of Squid Games as earlier covered in our story of 4Q21.

1.4. Big Tech Tracker

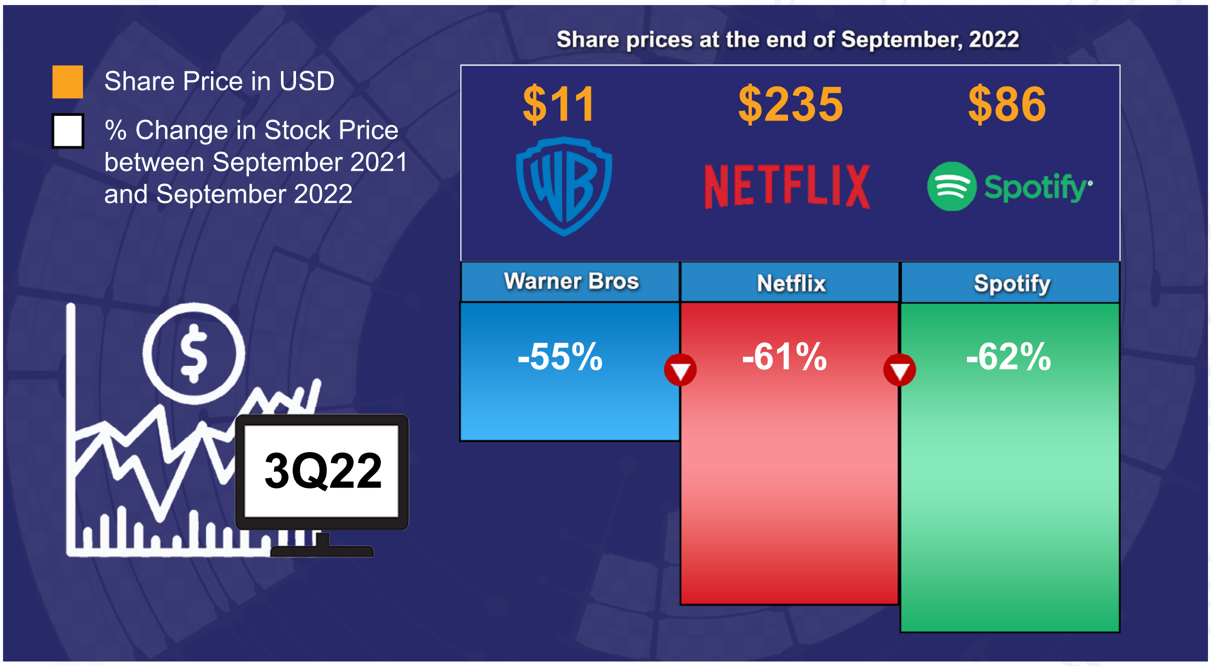
3Q22 continued with downward pressure on Big Tech share prices following the 2021 share price spikes on the back of the COVID pandemic.

At the end of September 2022, Meta's stock price stood at **USD 136,** down from the USD 339 share price of September 2021 while Alphabet traded at **USD 98**, down from the USD 134 share price of Sept 2021. Likewise, Amazon dropped to **USD 114,** from USD 165 in September 2021. Apple on the other hand traded at **USD 138** compared to USD 142 at the end of 3Q21.

In terms of quarterly earnings, GAFA (Google, Amazon, Facebook, and Apple) all posted a combined USD 314 Billion in 3Q22, up from USD 288 Billion in 3Q21.

1.5. Broadcast and Multimedia Performance

In the media space, media giants Disney, Netflix, and Warner Bros - Discovery reported **USD 20.7** billion in revenues, representing a 53% jump from the same period last year.



1.6. Device Launches

In terms of device releases, the big news during the quarter was Apple's dual release of its iPhone 14 series in September 2022.

The models came with reported advancements in water resistance, advanced camera, battery life, and speed came in 4 colours at the time of release.

Courtesy: Apple

Courtesy: Samsung

On the other hand, South Korean device giant, Samsung released its 4th edition of the Samsung Fold handset model in early August 2022.

The model comes with a 4400mAh battery, 25W charging capability (with the potential to retain battery charge for 35 hours), as well as enhanced camera, sound, and display capabilities.

1.7. Mobile Device Shipments

During the quarter, the global smart phone market recorded a total of **301 million** units shipped by the global device manufacturers. This is a 10% drop from the 334 million units shipped in 3Q21.

In terms of market share, Samsung led device shipments with a 21% share of total shipments, followed by Apple's 17% share of total mobile devices shipped.

Company	3Q22 Shipments	3Q22 Market Share	3Q21 Shipments	3Q21 Market Share	Year-Over-Year Change
SAMSUNG	64	21.20%	69.5	20.80%	-7.80%
Apple	51.9	17.20%	51.1	15.30%	1.60%
xiaomi	40.5	13.40%	44.3	13.30%	-8.60%

Company	3Q22 Shipments	3Q22 Market Share	3Q21 Shipments	3Q21 Market Share	Year-Over-Year Change
vivo	25.9	8.60%	33.3	10.00%	-22.10%
oppo	25.8	8.60%	33.2	9.90%	-22.30%
Others	93.6	31.00%	102.7	30.70%	-8.80%
Total	**301.9**	**100.00%**	**334.2**	**100.00%**	**-9.70%**

Source: IDC, Smart phone shipments in Million Units

Domestic Highlights

2.1. The Computer Misuse (Amendment) Act 2022

On the local ICT policy front, the highlight of the quarter was Parliament of Uganda's passing of the Computer Misuse (Amendment) Act 2022.

The Private Member's Bill moved by Kampala Central MP Hon. Muhammed Nsereko on 19th July 2022 sought to, among others, categorize new forms of offenses and crimes perpetuated through computers (digital platforms that include smart phones and associated media platforms).

The Bill, which is a sequel to the Computer Misuse Act of 2011, presented new classifications and penalties for digital crimes and offenses such as propagation of hate speech, abuse of the rights of children, cyberbullying, and ridicule, among others.

The bill sparked a range of opinions in the public square as different thought leaders weighed in on the bill's potential impact on the right to free speech amidst previously unaddressed offenses and abuses through the internet and associated social media channels.

Balancing the promotion of free speech, upholding societal values, as well as the protection of minors and digitally vulnerable persons in nascent digital markets like Uganda presents evolving policy and regulatory challenges.

By the end of the quarter, the Bill had been passed by the Parliament of Uganda and presented to H.E the President for subsequent assent.

2.2. ATC Marks 10 years

During the quarter, American Tower Corporation (ATC), the market's premier tower-only service provider, celebrated its 10th anniversary in Uganda.

It should be remembered that the Boston-based Group was the first provider to introduce tower lease business models to Uganda following an Asset Buy and Lease-Back arrangement with MTN Uganda in 2012. ATC Uganda has since then grown its portfolio from 900 legacy towers acquired from MTN to the present portfolio of 4,200 sites.

Dorothy Ssemanda Chief Executive Officer ATC (3rd right) Marek Busfy CEO ATC Africa (right) welcoming Thomas Tayebwa Deputy Speaker at the ATC 10th Anniversary Dinner at Serena Hotel Kampala

Courtesy: The Kampala Sun

The site profiles have evolved in design from the basic lattice towers of the early 2000's to include data network-dimensioned designs such as monopoles.

In an interview with ATC on industry prospects for the next 10 years, the licensee highlights a new focus on greening of the tower footprint with a deliberate move towards green energy solutions like solar as the central aspiration. By the year 2035, ATC plans to have an all-green tower network with 100% deployments on green energy dependence.

2.3. UCC Board Chair Promoted to Associate Professor

In more good news during the quarter, the UCC Board Chairperson Dr. Dorothy Okello was appointed Associate Professor of Electrical and Computer Engineering at Makerere University.

Besides steering the UCC Board, Dr. Okello doubles as the Dean at the College of Engineering, Design, Art, and Technology (CEDAT) at Makerere University.

UCC congratulates the Chairperson on her new appointment.

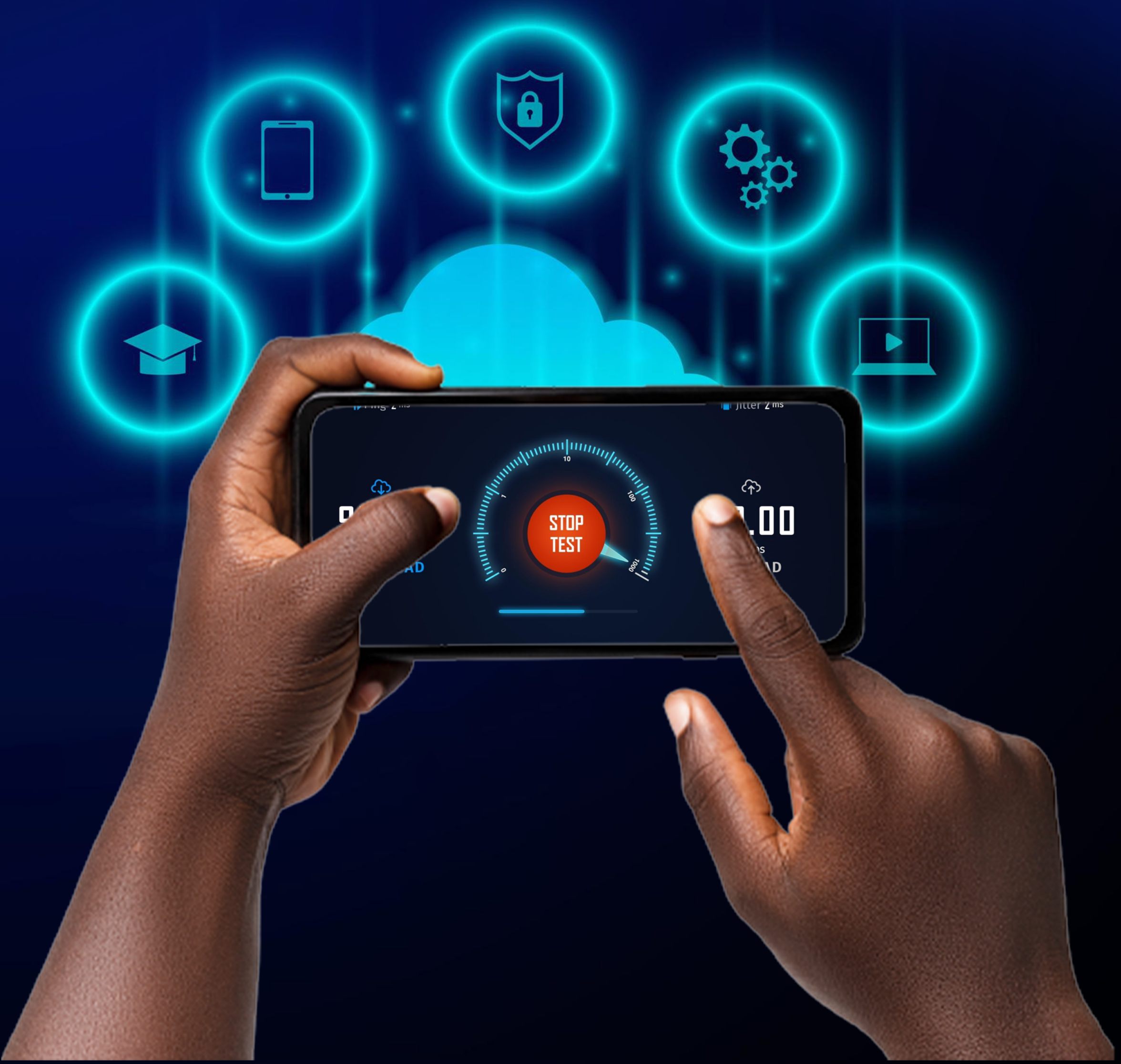
2.4. UCC Cyber Security Skilling Programme - UCC – Silensec National Cyber Security Competition

In yet another effort to enhance digital skills , UCC in partnership with Silensec (an ISO 27001 Certified Information Systems Trainer) undertook the 1st Cyber Security training and national competition.

The “Cyber Stars of Uganda” competition that attracted 11 universities and 250 students aimed to up-skill ICT student competencies in cyber security with a particular focus on vulnerability assessments, penetration testing, digital forensics and network defence skills.

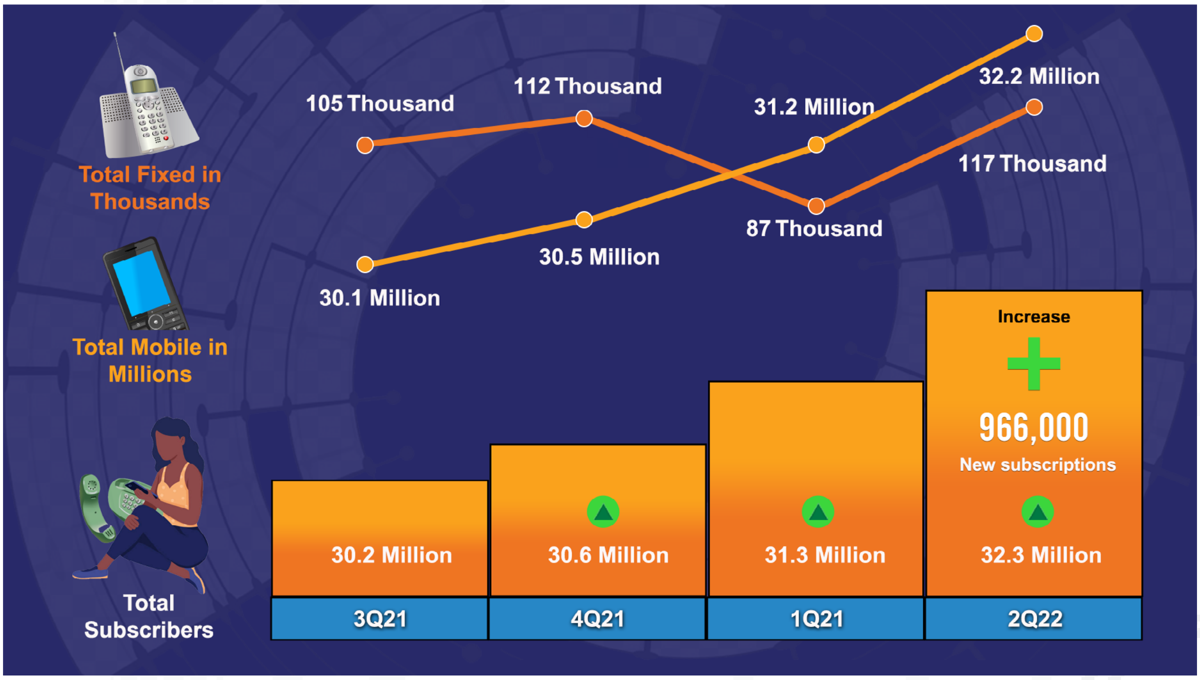
ISBAT University and St. Lawrence University produced the competition’s finalists.

Access and Subscription



3.1. Telephone Subscriptions

In the three months ending September 2022, the industry has seen a sustained increase in mobile and fixed telephone subscriptions. The total telephone subscriptions crossed the **32 million** active subscriptions mark, with **966,000 new subscriptions** added in the third quarter of 2022 alone.

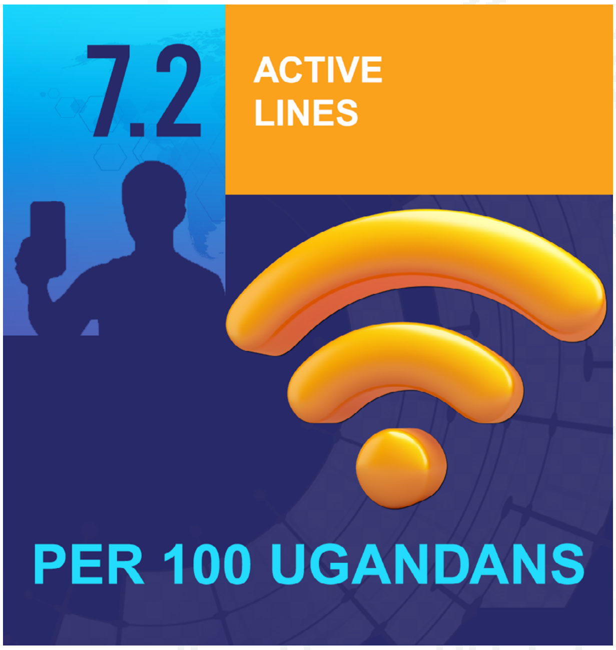


Of significance in the fixed line segment, is a 30,000 new fixed line installation, representing a **35% growth** in active fixed lines. This is especially noteworthy given a 25,000 line drop in the 3 months ended June 2022.

The growth in fixed lines has been fuelled by combo voice and data services being pushed by the leading fiber opcos.

In terms of year-on-year growth, the 12-month period ending September 2022 saw an **11% annual increase in subscriptions.**

Subsequent to the subscriptions' growth, national telephone penetration rose to **7.2 active lines** for every 10 Ugandans.



3.2. Devices and Terminals

The industry's combined active device and terminal count increased by more than **1 million new additions** in 3Q22.

This growth translated into **37.2 million** devices at the end of September 2022, up from 36.1 million devices in June 2022.

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

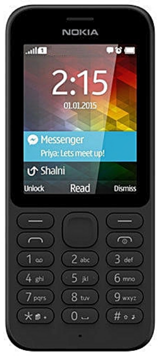
2Q22	***10.9M***
3Q22	***11.4M***

BASIC MOBILE PHONE

Can make calls and send text messages

Monthly Users

2Q22	***3.7M***
3Q22	***2M***



FEATURE PHONES

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

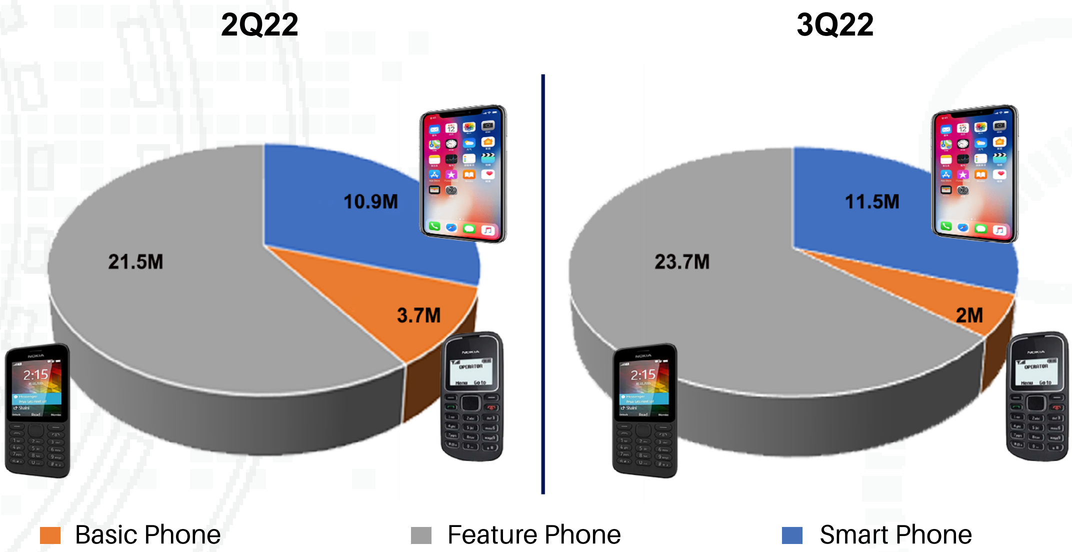
Monthly Users

2Q22	***21.4M***
3Q22	***23.7M***

Noteworthy during the quarter, was a **1.6 million** net drop in basic phones connected to the networks. The drop in basic phones may be attributed to customer migration to higher capacity data enabled devices as the proliferation of broadband networks continues, as well as heavy promotional marketing for feature and smart phone devices.

Conversely, feature phones and smart phones grew by **2.8 million** new units connected to the networks in 3Q22.

At the end of 3Q22, data-enabled devices connected to the networks accounted for 95% of total devices connected, while the share of basic devices had dropped to 5%.



On a year-on-year comparison, the 12-month period ending September 2022 saw the largest device addition since 2020, with a total of **4.4 million devices** added to the networks. This is a 13% year-on-year growth.

3.3. Broadband Subscriptions

On the broadband side, broadband connections grew by an additional **669,000** connections during the three months ending September 2022.

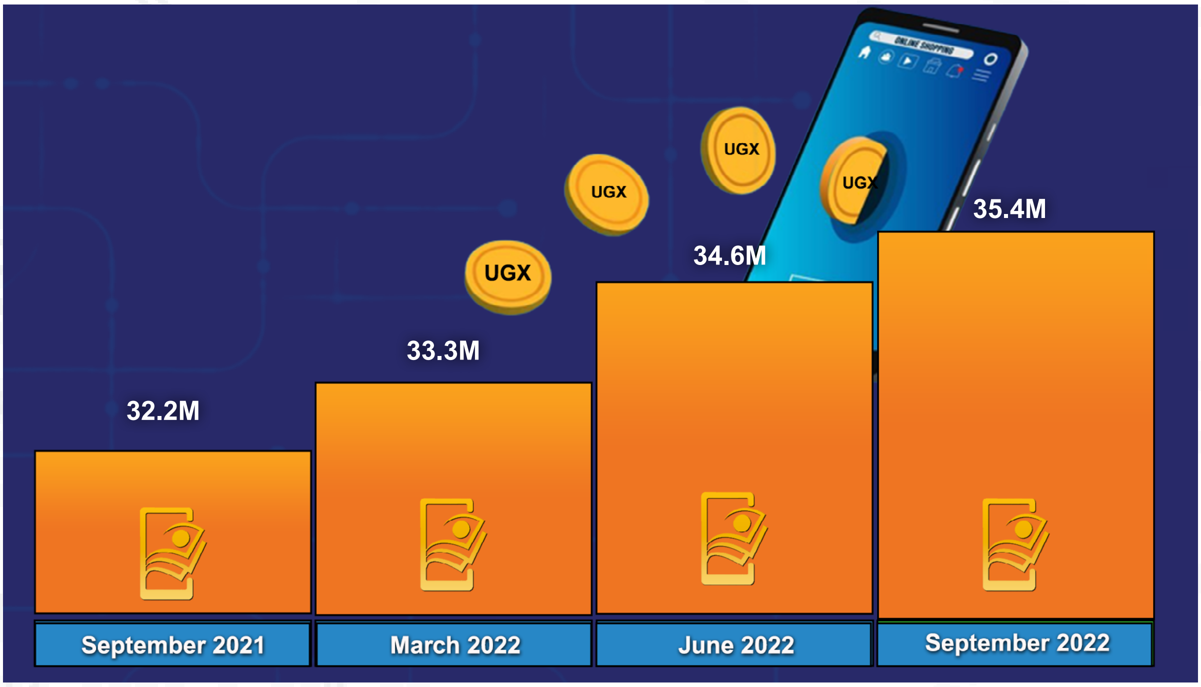
The growth in broadband subscriptions sees the market cross the **24 million active** broadband customer mark for the first time.

The 24.4 million broadband connections at the end of September 2022 translate into a broadband penetration of 5.5 broadband connections for every 10 Ugandans.

This growth is attributed to consumer shift from basic phones to internet-enabled devices (feature and smart devices) as discussed in the preceding section.

3.4. Digital Financial Services

For the first time, usage in the Digital Financial Service (DFS) space **surpassed 35 million accounts**. DFS drove industry growth, with 790,000 new registered accounts added between June and September 2022. As of September 2022, registered mobile money accounts stood at **35.4 million**.



The difference in the mobile money subscriber accounts (35.4M) and GSM subscriber accounts (32.3M) for the period ending September 2022 is due to the reporting of RGS 90-day active for GSM subscriber accounts, whereas mobile money accounts with outstanding balances as reported in total irrespective of the period of account activity.

The activity ratio in the Ugandan mobile money market continues to rise. As of September 2022, 68% of all registered mobile money accounts had participated in at least one billable transaction in the 90 days prior to September 30th, 2022.

On a year-on-year comparison, there was a **10% growth** in mobile money subscriptions from 32.2 million in September 2021 to 35.4 million subscriptions in September 2022.

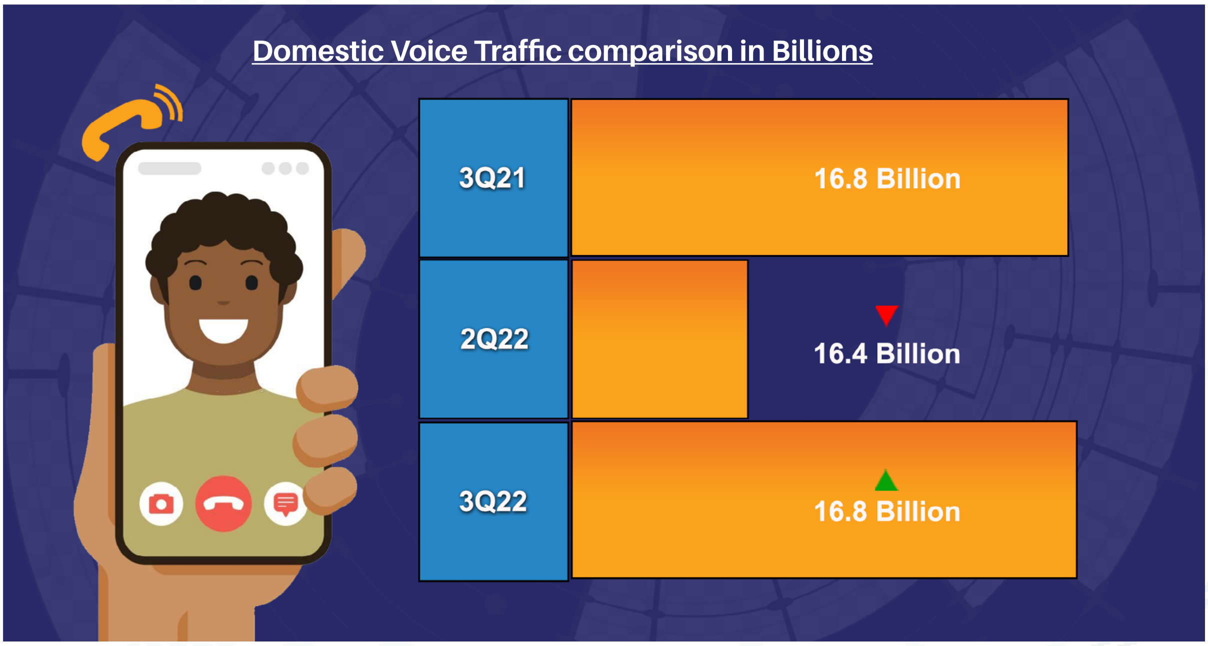
The number of active mobile money agents also increased from 451,606 in June 2022 to **473,517** by the end of September 2022.

Traffic and Usage

4.1 Domestic Voice Traffic

The telecommunications market maintained the domestic traffic performance with a total of **16.8 billion** minutes on the domestic networks.

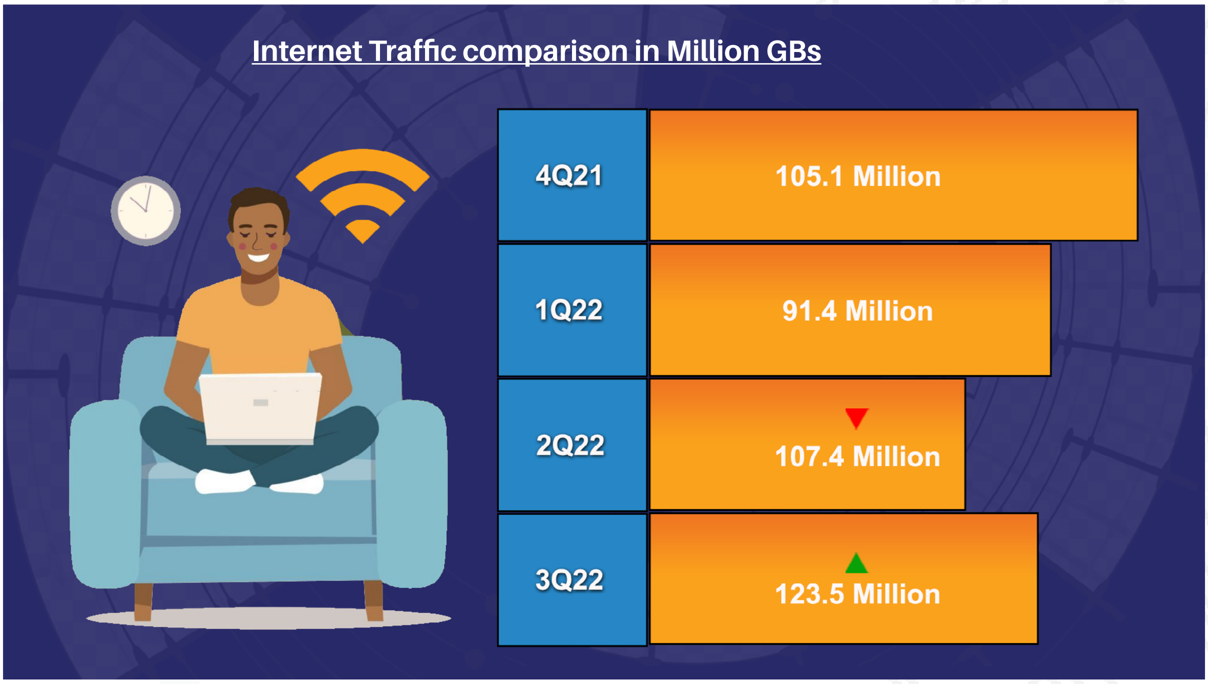
This is a 2% change from the 16.4 billion domestic minutes posted between April and June 2022.



Of the 16.8 billion minutes, 16.6 billion were intra network (on-net) calls while 152 million were across domestic networks (offnet). The domestic traffic distribution remains consistent with the pro-on-net pricing structure dominated by on-net bundle offers.

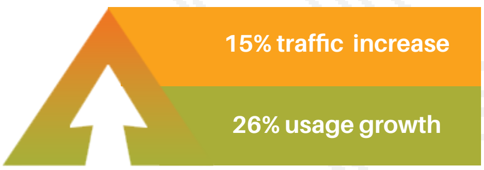
4.2. Internet Traffic

In terms of data usage, the market set a new quarterly data traffic record with **123.5 million** Gigabytes of data downloaded and uploaded on both fixed and mobile networks in 3Q22.



The broadband traffic growth represents a **15% increase** from traffic recorded in 2Q22.

On a year-on-year comparison, the record usage translates into a **26% growth** between 3Q21 and 3Q22.



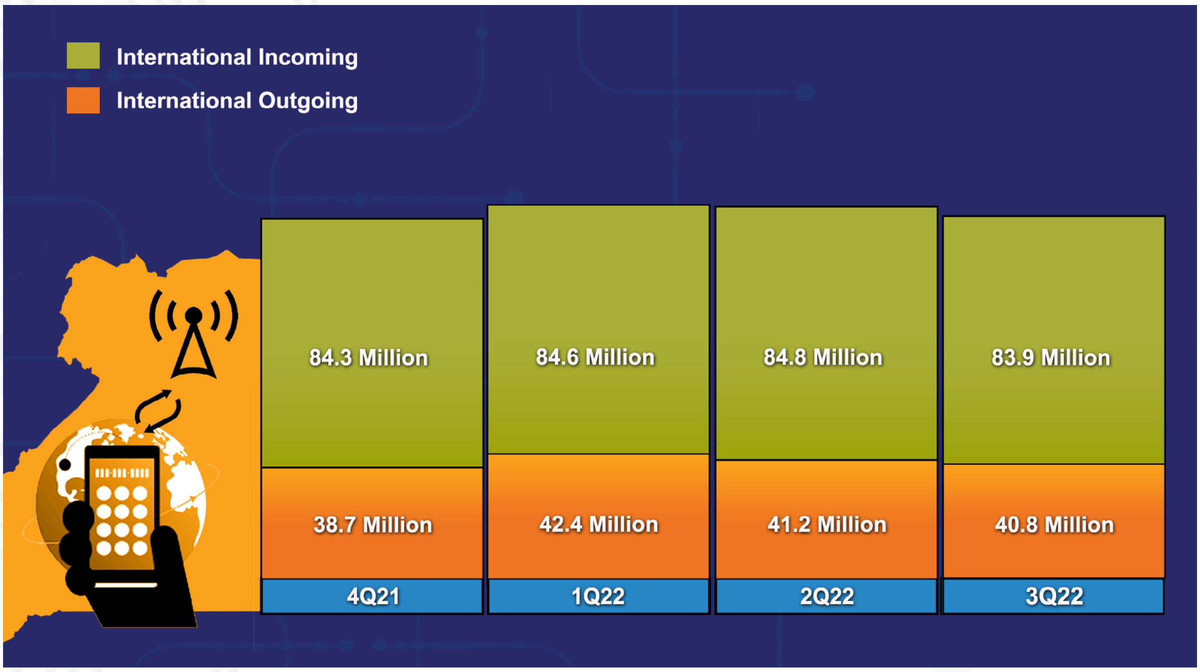
This growth in traffic is on the back of 11% growth in subscriptions and a **20% growth** in smart/feature devices between September 2021 and September 2022.

Besides the growth in subscriptions and hardware, the broadband usage growth was in part attributed to significant price discounts in the fixed wireless and domestic broadband connectivity segments. For some operators, discounts of as much as 35% were introduced for Mi-Fi and home router-based products.

The quarterly broadband traffic performance translates into average usage of **1.7 GBs** per subscriber per month.

4.3. International Voice Traffic

Consistent with the preceding 3 quarters, the market maintained an average of over **84 million** minutes of international incoming voice traffic, and **41 million** outgoing voice traffic.

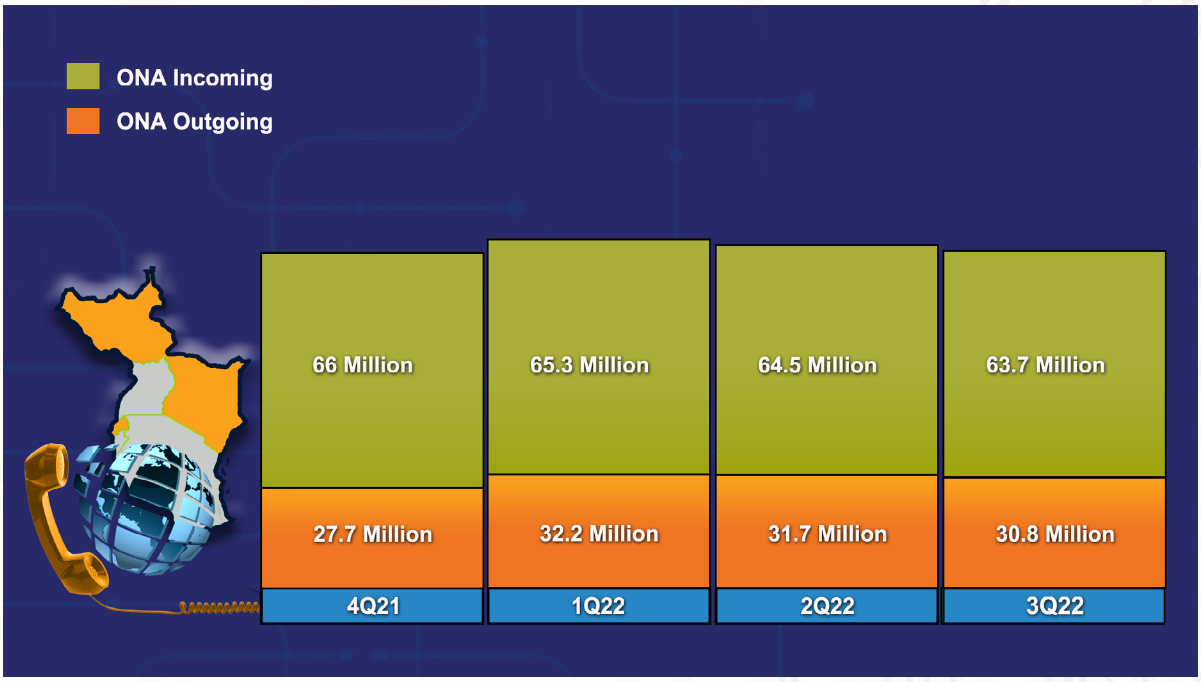


The flattening of the international voice traffic remains attributed to consumer behavioural switch to data-based calling and video conferencing options such as Whatsapp, Signal, Zoom, and Teams.

One Network Area (ONA) Traffic

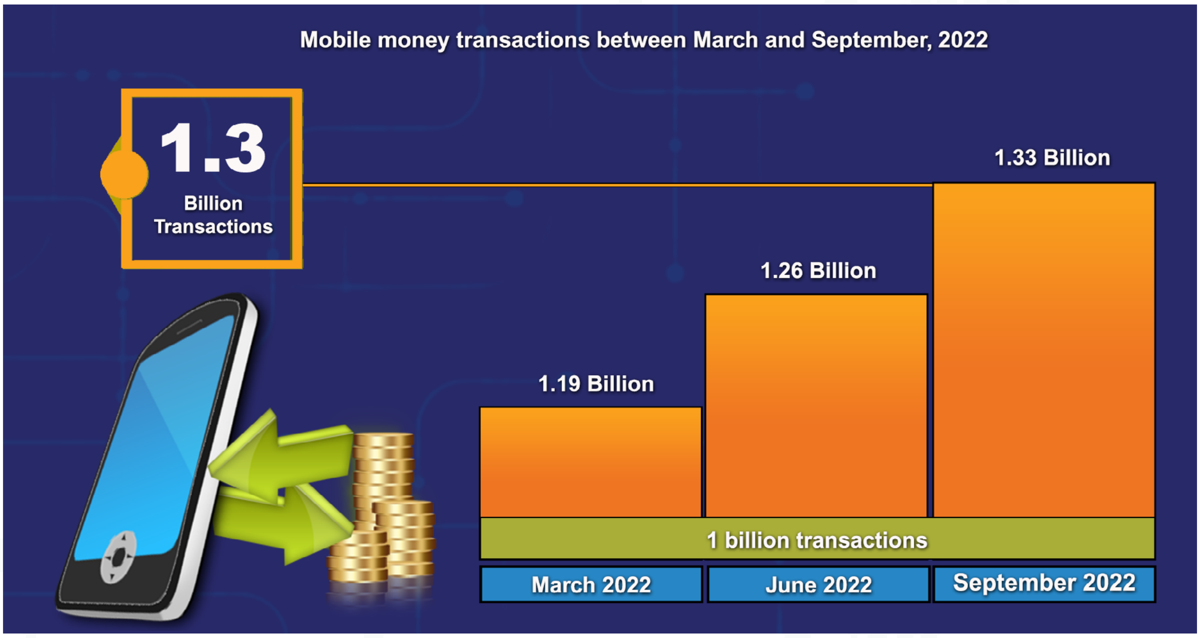
In the traffic distribution for the Northern Corridor states that are made up of: Uganda, Kenya, South Sudan and Rwanda, traffic to Uganda originating from the other partner states makes up 67%, translating into **63.7 Million** minutes, and **30.8 Million** outgoing minutes to these partner states.

The balance of traffic, and therefore payments for ONA, is in favour of Uganda.



4.4. Mobile Money Transactions

Mobile money transactions **grew by 6 percentage points** between 2Q22 and 3Q22. The **1.3 billion** mobile money transactions translate into a monthly average of 37 transactions per registered mobile money subscriber.



Source:Bank of Uganda (BOU)

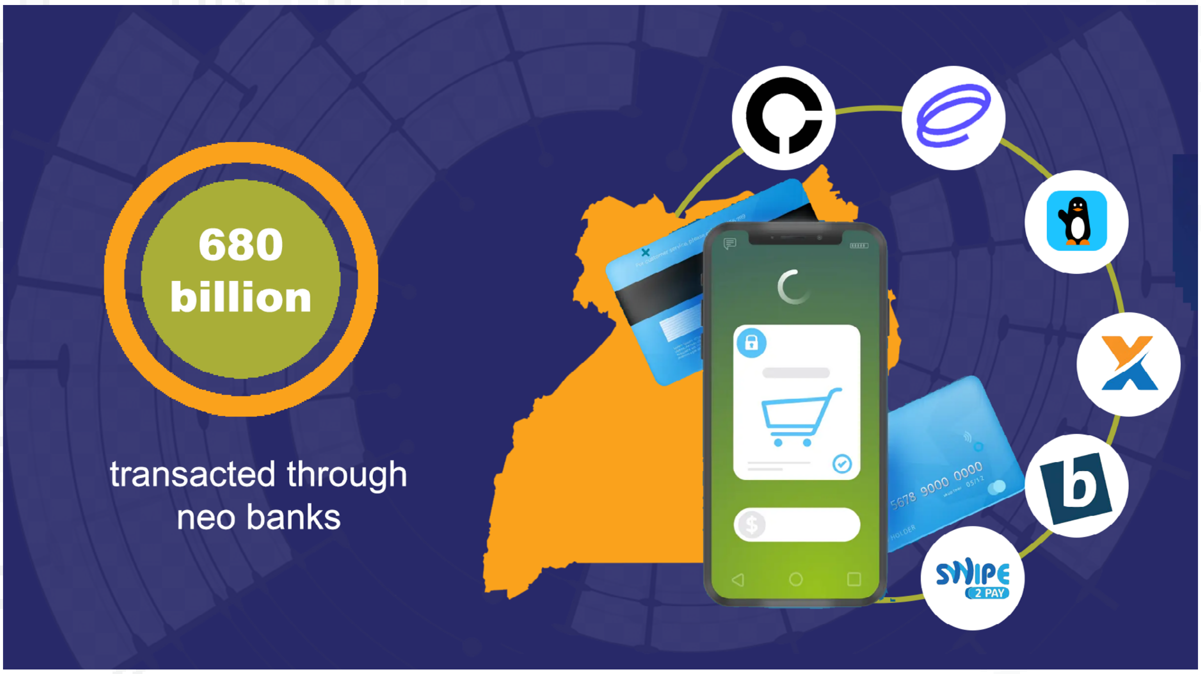
The 6% growth in quarterly transactions is consistent with the **7% growth** in subscriptions during 3Q22, confirming that this is largely organic growth.

The performance translates into an average of **420 million** mobile money transactions per month during 3Q22.

On a year-on-year comparison, the growth in transactions reflects a **21% growth** between 3Q21 and 3Q22.

Also noteworthy during the quarter was the growth in transactions on non-MNO and non-bank (Over-the-Top) payment wallets and neobanks such as Chipper Cash, Xente, Wave and Eversend.

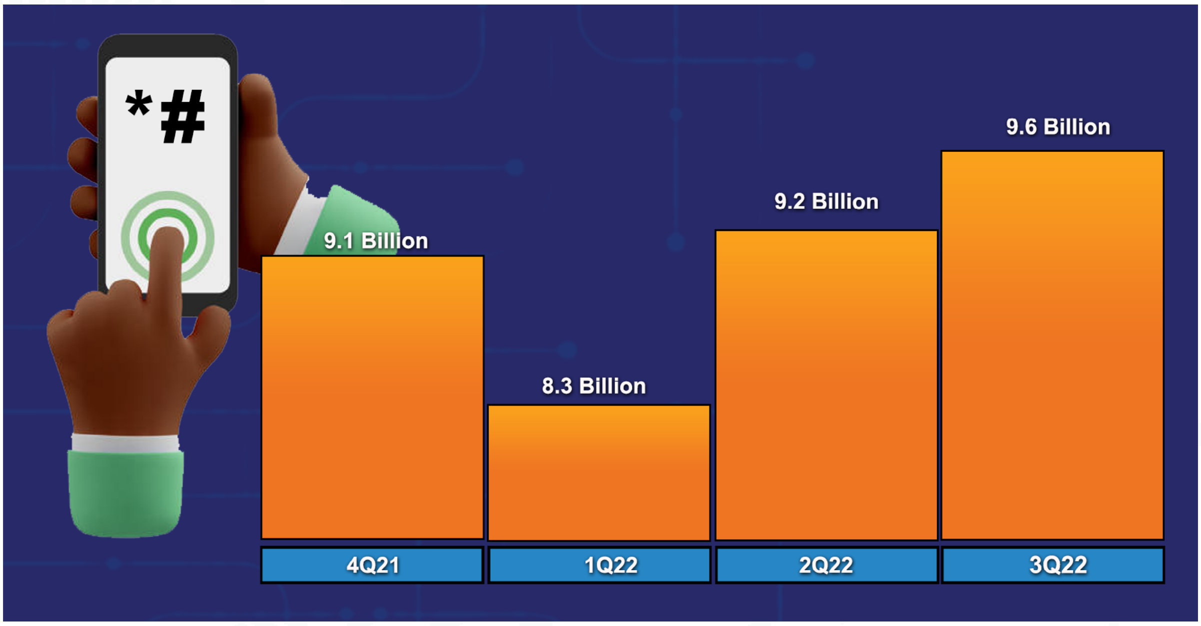
The OTT wallets and neo banks posted more than **6.5 million** transactions in 3Q22 and **UGX 680 billion** in total transaction value.



Source:Bank of Uganda (BOU)

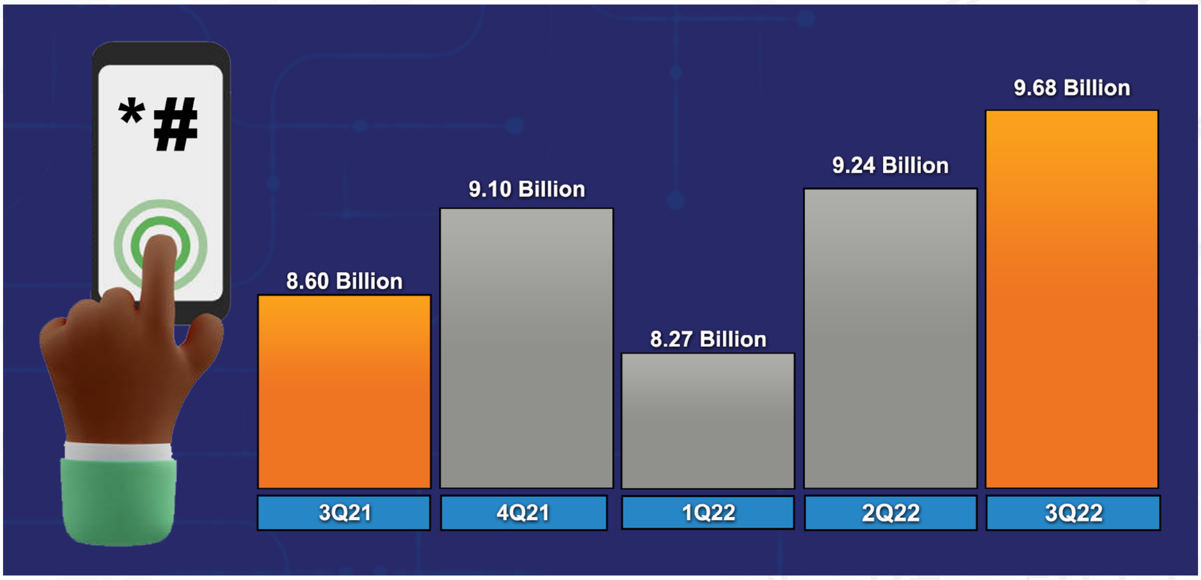
4.5. USSD Traffic

9.6 billion USSD sessions were recorded in 3Q22. This is a 443 million growth in USSD sessions between 2Q22 and 3Q22.



The 5% increase in sessions is closely aligned with the 6% change in the number of mobile money transaction flows.

The 12 months ending September 2022 also marked a year-over-year increase in USSD sessions, with a **12% increase** in 3Q22 USSD sessions compared to 3Q21.



Pricing and Product Highlights

5.1 Telecom Products and Pricing

5.1.1 MTN Increases Offnet Minutes in 1-Day Valid Voice Bundles

In the September 2022 price change, MTN increased the number of offnet minutes availed within the various day valid bundles. Here are the highlights of the price change:

- the lowest two bands (UGX 500 and UGX 700) can now be used as either on-net or off-net minutes.

- for the UGX 1,000 bundle, 40% of total available minutes (10 of the 25 bundle minutes) can now be used for off-net calls.

- for the UGX 2,000 bundle offer, off-net minutes available were increased from 5 to 20 minutes. This is a 75% increase in total off-net minutes within the bundle.

MTN Changes in 1-Day Voice Bundles				
MTN BUNDLE	Pre-September 2022		Post-September 2022	
Price	Onnet Mins	Offnet Mins	Onnet Mins	Offnet Mins
500	5	1	6	
700	8	2	10	
1,000	17	3	15	10
2,000	55	5	60	20

5.1.2. New Voice and Combo bundle offers

Airtel Uganda launched a 1-day valid segmented voice and combo bundles for their customers. The bundle costs Ugx.2,000 and offers 10 minutes for on and off net calls with a data bundle of 250 MBs or 60 minutes of On-net calls and 10 minutes for On and Offnet calls.

Key terms of the offer include:

- Purchase can be made through USSD *149# or *100#
- A customer can either use Airtel money or Airtime to purchase the offers.
- Data share and Me2u is not available for this offer.
- A customer cannot buy the offer for another customer.

airtel BUNDLE	Price UGX	On-net Minutes	On-net and Off-net Minutes	Data Volume
	2,000	0	10	250 Mbs
	2,000	60	10	0

5.1.3. Airtel Home Broadband Device prices amendments

In the quarter under review, Airtel reduced its home broadband prices by an average of 37.3% across the following devices.

airtel BUNDLE	Broadband Device	Pre-Sept 2022 Price (Ugx)	Post-Sept 2022 Price (Ugx)
	CAT 4 MIFI	123,000	75,000
	CAT 6 MIFI	180,000	100,000
	CAT 6 IDU/Router	280,000	200,000

5.1.4. New Airtel Home Broadband bundles

Airtel Uganda launched new home broadband bundles available for customers holding outdoor and indoor Airtel home devices. Key terms of the new bundles include:

- Data Sharing is not permitted.
- Can be purchased through USSD *100*9*2# or the Airtel App·
- New bundles are only available for Outdoor and indoor Airtel broadband devices.
- Customers on these data plans cannot purchase other Airtel market plans.

airtel BUNDLE	Bundle Name	Price UGX	Data Volume GB	Validity
	HBB Bundle 8 GB	20,000	8	30 days
	HBB Bundle 25 GB	50,000	25	
	HBB Bundle 45 GB	75,000	45	
	HBB Bundle 65 GB	100,000	65	
	HBB Bundle 110 GB	150,000	110	
	HBB Bundle 160 GB	200,000	160	
	HBB Bundle 260 GB	300,000	260	

5.1.5. Changes in international Long-Distance rates for Nigeria destinations

In September 2022, Nigeria revised its international termination rate paid by Overseas carriers for terminating international calls on local networks. The rate was increased from USD 0.045 to USD 0.10 fixed rate.

The revision of the international termination rate was based on the findings of the study by Nigeria Communications Commission. This led to an increase in the mobile voice call rates for Airtel Uganda and Lyca Mobile destined to Nigeria, with Airtel Uganda increasing its rates from Ugx.10 to Ugx.15 per second and Lyca Mobile from Ugx.7 to Ugx.10 per second respectively.

MTN maintained its rate of Ugx.6 per second for calls to Nigeria.

BUNDLE	airtel	Lycamobile	MTN
Pre Sept 22 Price per Sec	10	7	6
Post Sept 22 price per Sec	15	10	6

5.2. Broadcast products and pricing

The Broadcast and Multimedia sector observed price changes for select Satellite and Terrestrial bouquets and channel propositions in the three months ending September 2022. The price changes took effect from September 1st 2022 for DSTV, Zuku TV and Startimes.

5.2.1 Star Times

Bouquet	Old Price (UGX)	New Price (UGX)	Validity
Nova (Antenna)	1,200	1,350	24 hrs
	12,000	13,500	30 days
Classic (Antenna)	28,000	30,000	30 days
Nova (Dish)	13,500	15,000	30 days
Smart (Dish)	28,000	30,000	30 days

5.2.2 Multichoice DSTV

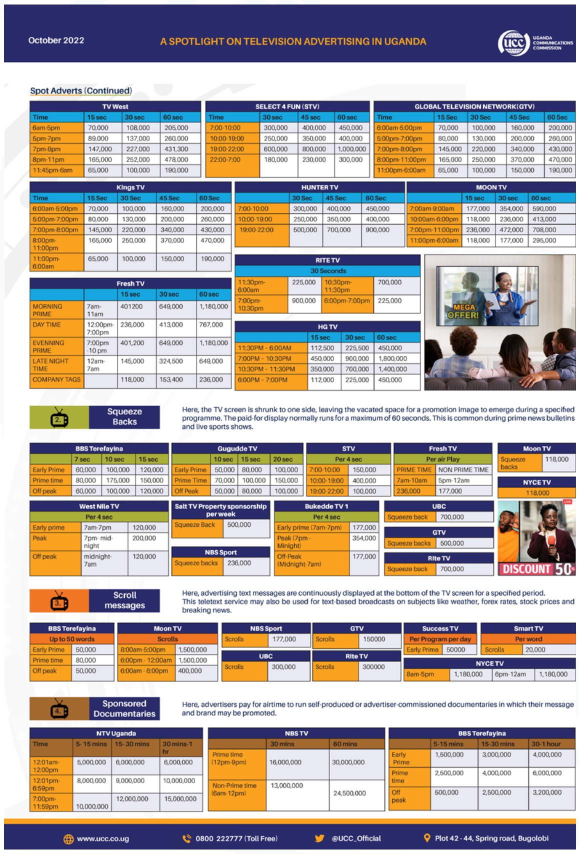
Bouquet	Old Price (UGX)	New Price (UGX)
Asian Bouquet E36	132,000	132,000
Asian Add-on Bouquet E36	132,000	132,000
Premium E/Afr E36 + ASIA36	261,000	277,000
French Touch Bouquet E36	27,500	27,500
French Plus Bouquet E36	136,000	136,000
Premium E/Afr + French Bonus	375,000	391,000
Stay Ultra	88,000	93,500
Stay Essential	67,000	71,500
Stay Basic	41,000	43,500
DStv Business Asia add-on	13,000	14,000
DStv Business European add-on	13,000	14,000
DStv Business French add-on	13,000	14,000
Play Ultra	325,000	345,000

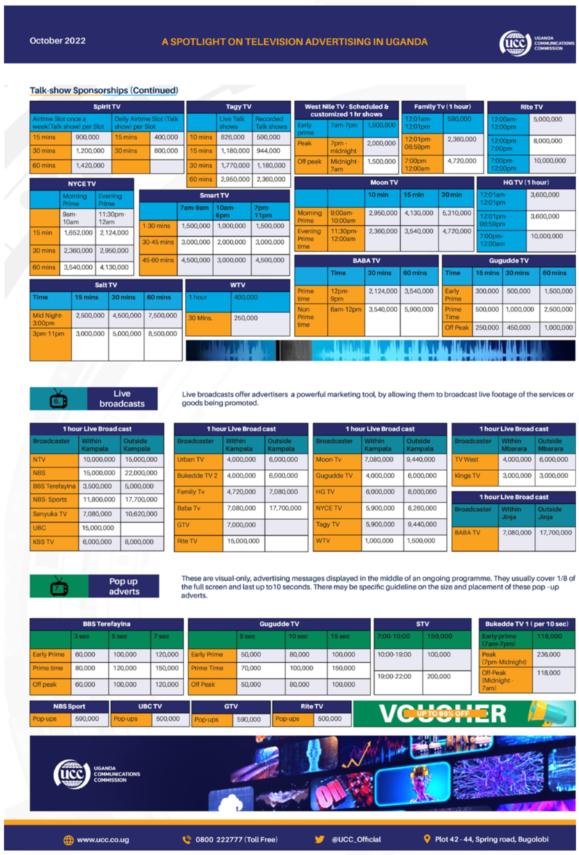
5.2.3 Zuku Asia 42500 Standalone Pricing

Bouquet	Old Price (UGX)	New Price (UGX)
Zuku Asia 42500 Standalone	39,000	42,700

5.2.4 Broadcast Rates

In the quarter ending September 2022, the Commission issued a visual broadcast (Television) price comparison publication. This is to enable consumers and media buyers keep abreast of comparative charges for different media offerings such as TV spot Ads, TV talk shows, documentaries, live broadcasts, clock sponsorships, scroll messages, pop ups and squeeze backs.





5.3. UPL Tariff Reviews

During the quarter UCC approved new retail rates for domestic and international postal services. The new rates that take effect on 15th October 2022 are shown below:

Posta Uganda
We deliver trust

UGANDA POST LIMITED

NEW TARIFF RATES with effect from 15th October 2022

Domestic Letter Post Tariff

Weight	Rates
First 20gms	2,122
Every extra 10gms up to 2kgs	141

International Letter Post Tariff

Weight	Zone 1	Zone 2	Zone 3	Zone 4
First 20gms	4,243	4,788	5,657	6,365
Every extra 10gms up to 2kgs across all Zones		1,100		

International Parcel Post Tariff

Weight	Zone 1	Zone 2	Zone 3	Zone 4
First 2kgs	85,500	109,000	119,500	129,500
Weight	Zone 5	Zone 6	Zone 7	Zone 8
First 2kgs	139,000	149,500	169,000	208,500
Every extra 500gms up to 30kgs across all Zones			26,250	

Tariff For Other Services

Private Letter Box Rental Fees (Annual)

CATEGORY OF RENTER	TARIFF
Large Box at Kampala GPO or Clock Tower	120,000
Small Box at Kampala GPO or Clock Tower	90,000
Box at DPOs (Branch Offices) in Kampala	90,000
Box at Regional Offices (Mbarara, F/Portal, Jinja, Mbale, Gulu and Arua)	80,000
Box at any other DPO	60,000
Box at SPOs in Kampala	50,000
Box at any other SPO	30,000
Digital address (Company)	90,000
Digital address (Individual)	20,000

Key Deposit & Lock Replacement

Deposit on Keys for Private Box at all offices (per key)	15,000
Replacement of lost Authority Card at all offices	10,000
Replacement of lock consequent upon key loss at all offices	45,000
Replacement of lost Private Bag at all offices	70,000

Private Bag Rental Fees (Annual)

At Kampala Gpo	80,000
At Dpos (Branch Offices) In Kampala	80,000
At All Other Dpos	50,000
At All Spos	50,000

Other Mail Services

Registration Fee - Inland	2,000
Registration Fee - International	7,000
Untracked International Service Barcode (Merchandise Only)	3,000
Tracked International Service Barcode (Letters & Merchandise)	10,000
Written Proof Of Delivery - Domestic	2,000
Written Proof Of Delivery - International	10,000
Proof Of Delivery By Sms - International	2,000
Proof Of Delivery By Email - International	1,000
Handling Charges Per Ordinary Packet	3,000
Handling Charges Per Registered Packet Except Letters	3,000
Handling Charges For Parcels & M-bags (From Abroad)	7,000
Redirection Fee If No Request Was Made By Sender	5,000
Address Search Fee	50,000
Business Reply Paid Service Fee (In Addition To Postage) - Inland	2,000
Business Reply Paid Service Fee (In Addition To Postage) - International	5,000
Handling Fee For Overseas Philately Items Per Order	10,000
Service Fee Per Fdc Envelope	2,000
Poste Rest Ante: Delivery Fee Per Item	10,000
Advertising Mail Through Physical Boxes (Not Over 50gm Per Item)	500
Advertising Mail By Bulk Sms (per sms)	50shs
Advertising Mail By Bulk Email (per email)	20shs
Demurrage on Parcels Not collected within 10 days	1,000
Demurrage on Packet Not Collected Within 2 Months	5,000
Search Fee For Certificates Not Collected Within 6 Months	20,000
Search Fee For Certificates Not Collected Within 12 Months	40,000
Postal Tour Fee (Per Person)	3,000
Non Address Fee (Charged on Items Without Postal Address)	2,000
Easy Mail Delivery Service - Company Per Year	1,000,000
Easy Mail Delivery Service - Individaul Per Year	500,000

International Letter Country Zoning

COUNTRY	ZONE
Afghanstan	3
Albania	2
Algeria	2
Angola	2
Anguilla	4
Antiles	2
Argentina	2
Armenia	2
Aruba	3
Ascension	3
Australia	4
Austria	2
Azerbaijan	2
Bahamas	2
Bahrain	2
Bangaladesh	2
Barbados	4
Belarus	2
Belgium	2
Belize	3
Benin	2
Bermuda	3
Bhutan	4
Bolivia	4
Bosinia (JP BH)	2
Bosinia (Moster)	2
Botswana	2
Brazil	2
Brunei Darussalam	2
Bulgaria	2
Burkina Faso	2
Burundi	2
Cambodia	3
Cameroon	2
Canada	3
Cape Verde	4
Cayman Islands	3
Central African	2
Chad	2
Chile	2
Chile Easter Islands	2
China	2
Columbia	2
Comoros	2
Congo (Rep.)	2
Cook Island	3
Costa Rica	2
Cote d'Ivoire	2
Croatia	2
Cuba	3
Curacao	3
Cyprus	2
Czech Rep.	2
DRC	2
Denmark	2
Djibouti	2
Domenican Republic	4
Dominica	4
Ecuador	3
Egypt	2
El Salvador	4
Equatoria Guinea	2
Eritrea	2
Estonia	2
Ethiopia	2
Falkland Island	3
Fiji	4
Finland	2
France	2

COUNTRY	ZONE
French Guiana	3
Gabon	2
Gambia	2
Georgia	2
Germany	2
Ghana	2
Greece	3
Grenada	3
Guadeloupe	3
Guatemala	3
Guinea	3
Guinea-Bissau	3
Guyana	3
Haiti	3
Honduras	4
Hong Kong	3
Hungary	2
Iceland	4
India	2
Indonesia	2
Iran	2
Iraq	2
Ireland	2
Isarel	2
Italy	2
Ivory Coast	2
Jamaica	2
Japan	2
Jordan	2
Kazakhstan	3
Kenya	1
Korea, South	2
Kuwait	3
Kyrgyzstan	3
Lao Peopl's	3
Latvia	2
Lebanon	2
Lesotho	2
Liberia	2
Libya	2
Lithuania	2
Luxemburg	2
Macao-China	3
Madagascar	3
Malawi	2
Malaysia	2
Maldives	4
Mali	2
Malta	2
Martinique	4
Mauritania	3
Mauritius	3
Mayotte	3
Mexico	2
Moldova	2
Mongolia	3
Montenegro	2
Moroco	3
Mozambique	2
Myanmar	4
Namibia	2
Nauru	3
Nepal	3
Netherlands	2
New Caledonia	3
New Zealand	3
Nicaragua	4
Niger	4
Nigeria	3
Norway	2
Oman	3
Pakistan	3
Palestine	2
Panama	4

COUNTRY	ZONE
Papua New	3
Paraguaya	4
Peru	3
Philippines	2
Poland	2
Portugal	2
Qatar	2
Reunion	4
Romania	2
Russia	2
Rwanda	1
Saint Chris - topher	3
Saint Lucia	3
Saint Maarten	3
Saint Vin - cent	3
Samoa	3
Sao Tome	3
Saudi Arabia	3
Senagal	3
Serbia	2
Sierra leone	3
Singapore	2
Slovakia	2
Slovenia	2
Solomon Islands	3
Somalia	2
South Africa	2
South Sudan	2
Spain	2
Sri Lanka	3
Sudan	2
Suriname	4
Eswatini	2
Sweden	2
Switzerland	2
Syrian Arab	2
Tanzania	1
Thailand	3
The former Yugoslav	3
Tijikistan	3
Timor-Leste (Dem.Rep)	4
Togo	2
Tonga	3
Trinadad and Tobago	3
Tunisia	2
Turkey	2
Turkmeni - stan	2
Turks and Caicos Island	4
Tuvalu	4
Ukrain	2
United Arab Emirates	2
United Kingdom	2
United States of America	3
Uruguay	4
Uzebekistan	4
Vanuatu	4
Vatican	2
Venezuela	3
Vietnam	3
Virgin Islands	3
Yemen	3
Zambia	3
Zimbabwe	3

International Parcel Country Zoning

COUNTRY	ZONE
Afghanstan	8
Albania	5
Algeria	3
Angola	2
Anguilla	7
Antiles	6
Argentina	4
Armenia	4
Aruba	5
Ascension	4
Australia	8
Austria	4
Azerbaijan	5
Bahamas	2
Bahrain	5
Bangaladesh	5
Barbados	8
Belarus	5
Belgium	5
Belize	7
Benin	2
Bermuda	6
Bhutan	7
Bolivia	8
Bosinia and herzegovina (JP BH	4
Bosinia and herzegovina (Moster)	3
Botswana	5
Brazil	6
Brunei Darussalam	3
Bulgaria	3
Burkina Faso	4
Burundi	2
Cambodia	5
Cameroon	2
Canada	8
Cape Verde	7
Cayman Islands	6
Central African Republic	3
Chad	3
Chile	5
Chile Easter Islands	5
China (People's Republic)	5
Columbia	6
Comoros	2
Congo (Rep.)	2
Cook Island	8
Costa Rica	5
Cote d'Ivoire (Rep.)	3
Croatia	3
Cuba	7
Curacao	7
Cyprus	4
Czech Rep.	4
Democratic Repulic of Congo	3
Denmark	3
Djibouti	2
Domenican Republic	6
Dominica	6
Ecuador	7
Egypt	3
El Salvador	6
Equatoria Guinea	2
Eritrea	2
Estonia	5
Ethiopia	3
Falkland Island (Malvinas)	6

COUNTRY	ZONE
Fiji	7
Finland	4
France	3
French Guiana	6
Gabon	4
Gambia	3
Georgia	7
Germany	6
Ghana	5
Greece	5
Grenada	4
Guadeloupe	8
Guatemala	4
Guinea	5
Guinea-Bissau	6
Guyana	7
Haiti	4
Honduras	7
Hong Kong, China	7
Hungary	6
Iceland	8
India	3
Indonesia	6
Iran	7
Iraq	2
Ireland	3
Isarel	6
Italy	3
Ivory Coast	3
Jamaica	4
Japan	5
Jordan	3
Kazakhstan	8
Kenya	1
Korea, South	5
Kuwait	3
Kyrgyzstan	5
Lao People's Dem. Rep.	7
Latvia	4
Lebanon	3
Lesotho	4
Liberia	3
Libya	4
Lithuania	4
Luxemburg	4
Macao - China	7
Madagascar	6
Malawi	4
Malaysia	4
Maldives	7
Mali	5
Malta	5
Martinique	8
Mauritania	6
Mauritius	5
Mayotte	8
Mexico	2
Moldova	5
Mongolia	7
Montenegro	4
Moroco	5
Mozambique	3
Myanmar	6
Namibia	4
Nauru	5
Nepal	5
Netherlands	3
New tCaledonia	7
New Zealand	8
Nicaragua	7
Niger	7
Nigeria	7
Norway	7
Oman	5
Pakistan	5
Palestine	2
Panama	6

COUNTRY	ZONE
Papua New	8
Paraguaya	7
Peru	7
Philippines	4
Poland	5
Portugal	5
Qatar	2
Reunion	8
Romania	6
Russia	8
Rwanda	1
Saint Christopher and Nevis	4
Saint Lucia	5
Saint Maarten	5
Saint Vincent and the Grenadines	6
Samoa	6
Sao Tome and Principe	5
Saudi Arabia	6
Senagal	4
Serbia	4
Sierra leone	5
Singapore	3
Slovakia	3
Slovenia	2
Solomon Islands	5
Somalia	2
South Africa	3
South Sudan	2
Spain	4
Sri Lanka	6
Sudan	2
Suriname	7
Eswatini	2
Sweden	4
Switzerland	3
Syrian Arab Rep.	3
Tanzania	1
Thailand	5
The former Yugoslav Rep. of Macedonia	6
Tijikistan	5
Timor-Leste (Dem.Rep)	6
Togo	3
Tonga	5
Trinadad and Tobago	5
Tunisia	4
Turkey	5
Turkmenistan	4
Turks and Caicos Island	5
Tuvalu	6
Ukrain	7
United Arab Emirates	2
United Kingdom (Great Britain)	7
United States of America	8
Uruguay	8
Uzebekistan	8
Vanuatu	6
Vatican	5
Venezuela	6
Vietnam	6
Virgin Islands	5
Yemen	6
Zambia	5
Zimbabwe	7

"All charges are in ugandan shillings"

POSTA UGANDA IS REGULATED BY UGANDA COMMUNICATIONS COMMISSION

5.4. Mobile Internet (Retail) Pricing

5.4.1 Comparing Non-Expiry Bundles

	Non expiry mobile data bundles		
		MTN	airtel
Non-expiry bundles (low volume)		MTN (MTN Freedom)	Airtel (Chilax)
	Price (UGX)	5,000	5,000
	How to Buy	*160*2#	*175#, *100#, *185#
	Volume (GBs)	45	45
	Volume (MBs)	46,080	46,080
	Price per MB	2	2

5.4.2 Pricing for Select Fiber-To-The-Home (FTTH) Packages as of September 2022

The cost of 1Mbps of bandwidth in the low-value monthly fiber bundles ranges between **UGX 8,000/= to UGX 13,000/=** with data speeds ranging from 1Mbps to 20Mbps.

Additionally, for high-data-consuming customers, the price of 1Mbps of bandwidth ranges from **UGX 8,300/= to UGX 134,000/=**, and the data speeds range from 10Mbps to 100Mbps.

Low value basket (Lowest bundle speed available)			
Operator	Speed basket in Mbps	Monthly Subsription Charge	UGX Per Mbps
SIMBA TV	15	120,000	8,000
LIQUID TELECOM	20	189,500	9,475
MTN	20	195,000	9,750
IS.	10	130,000	13,000
SprintUG LIVE UNLIMITED	10	165,000	16,500
airtel	10	170,000	17,000
SOMBHA Solutions Store	8	175,000	21,875
ROKE	5	112,000	22,400

Low value basket (Lowest bundle speed available)			
Operator	Speed basket in Mbps	Monthly Subsription Charge	UGX Per Mbps
truIT	5	135,000	27,000
echo	5	164,000	32,800
EABS	10	500,000	50,000
CLOUD CORE SYSTEMS	4	220,000	55,000
UTCL	1	134,400	134,400

High value basket (Highest bundle speed available			
Operator	Speed basket in Mbps	Monthly Subsription Charge	UGX Per Mbps
LIQUID TELECOM	100	525,500	5,255
MTN	40	295,000	7,375
SIMBA TV	60	499,000	8,317
SprintUG LIVE UNLIMITED	30	299,000	9,967
echo	100	1,049,000	10,490
airtel	30	350,000	11,667
ROKE	20	235,000	11,750
EABS	50	600,000	12,000
truIT	40	650,000	16,250
SOMBHA Solutions Store	15	351,000	23,400
UTCL	10	1,340,000	134,000

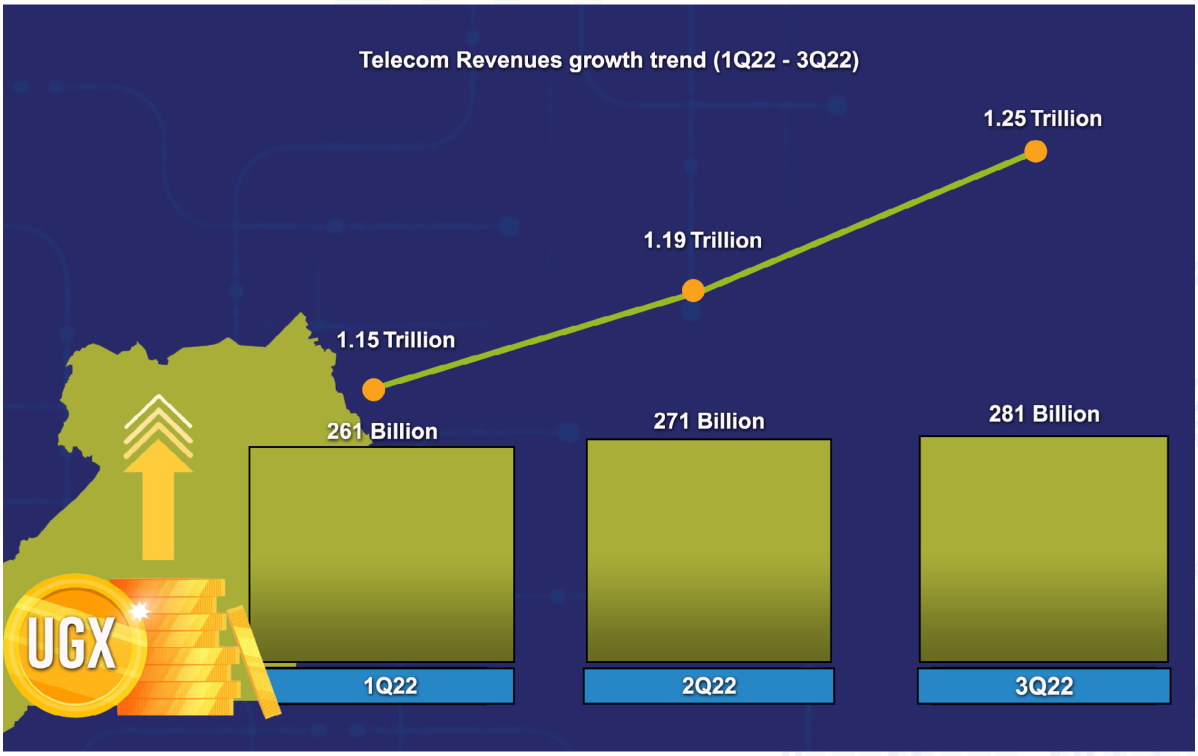
Financial Performance

6.1. Telecom Revenues

The Telecom industry has crossed the **UGX 1.2 trillion** revenue mark, and grossed a record quarterly revenue of **UGX 1.25 trillion.** This is a **5% growth** in comparison with the UGX 1.19 trillion realised in 2Q22.

Of the reported revenue, 22.4% came from data services, 36.6% from voice services, and 17% from tower lease revenues. Other sources such as device sales and wholesale services accounted for the remaining 24%.

Notably, data sales have maintained a 4% quarter-on-quarter growth rate as was seen in 2Q22. On the other hand, voice sales posted a **2% quarter-on-quarter growth** against the backdrop of a 1% decline observed in 2Q22.



Post and Courier

7.1. Trending Models in the Sector

With the changing customer tastes, preferences and demands, the postal and courier sub sector continues to reform, develop strategies and technologies aimed at enhancing operational efficiency, speed, and security of both the couriers and customers. Some of the emerging business models include:

7.1.1 Crowdsourcing

Emerging ICTs and growth in smart phone penetration have enabled crowd-sourced deliveries to enter the industry.

This new business model allows faster and cheaper last-mile deliveries, especially in cities and major towns across the country. For example, Glovo is successfully providing customers with fast and affordable last-mile transport services for food, merchandise, documents, transportation, and parcels.

Source: Glovo

7.1.2 Drone delivery

Digital transformation in the postal and courier industry has continued to grow at a fast pace. One of the most promising technologies is the use of drones for express delivery. Drones provide faster deliveries of delicate items such as medical samples to the most remote areas that are hard to reach.

Several global courier companies are already experimenting on the drone's delivery possibilities. For example, UPS has partnered with Zipline for medical delivery in Africa.

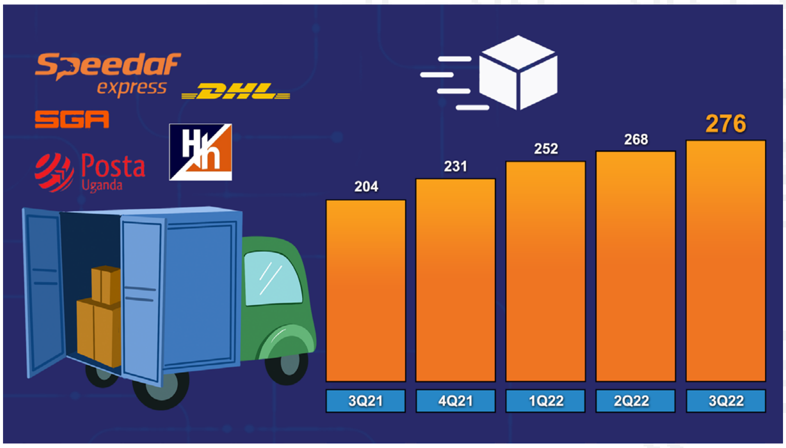
With the issuing of the Civil Aviation (Remotely Piloted Aircraft Systems) Regulations 2020 by the Uganda Civil Aviation Authority (UCAA), we expect the Uganda postal and courier service market to adopt the drone business model in the near future.

Source: Forbes

7.1.3 Automobiles /fleets supporting mail delivery

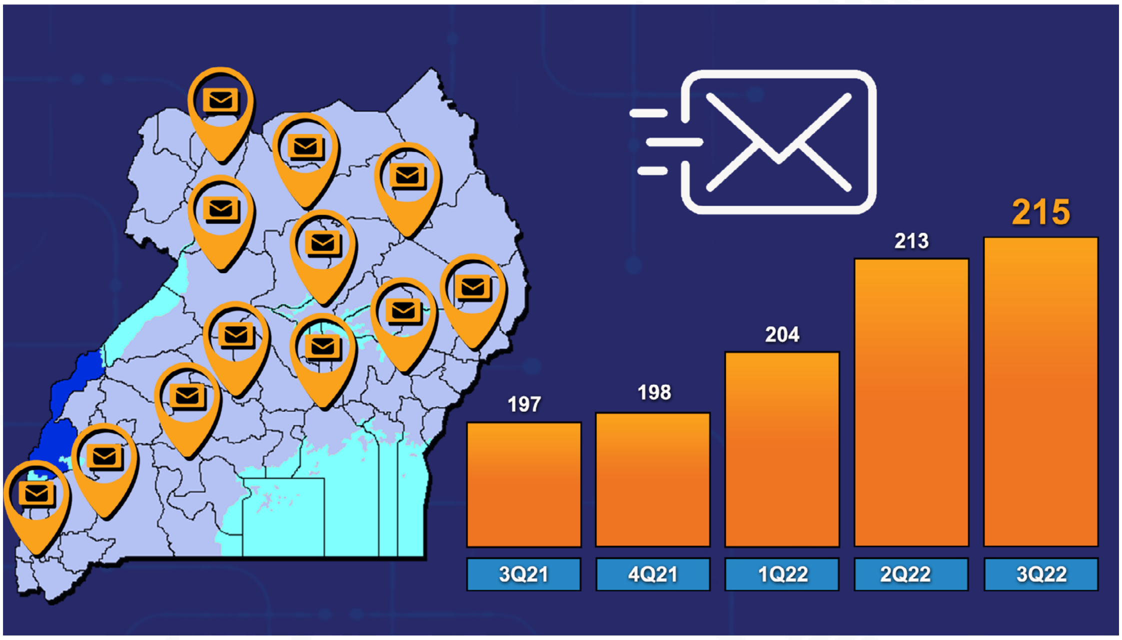
The number of vehicles used in mail deliveries grew from 268 vehicles in 2Q22 to **276 vehicles** in 3Q22, registering a 3% quarter-on-quarter growth.

On a year-on-year comparison, the number of automobiles grew by **more than 70 vehicles,** translating into a 35% growth.



7.1.4 Post and Courier geographical Coverage.

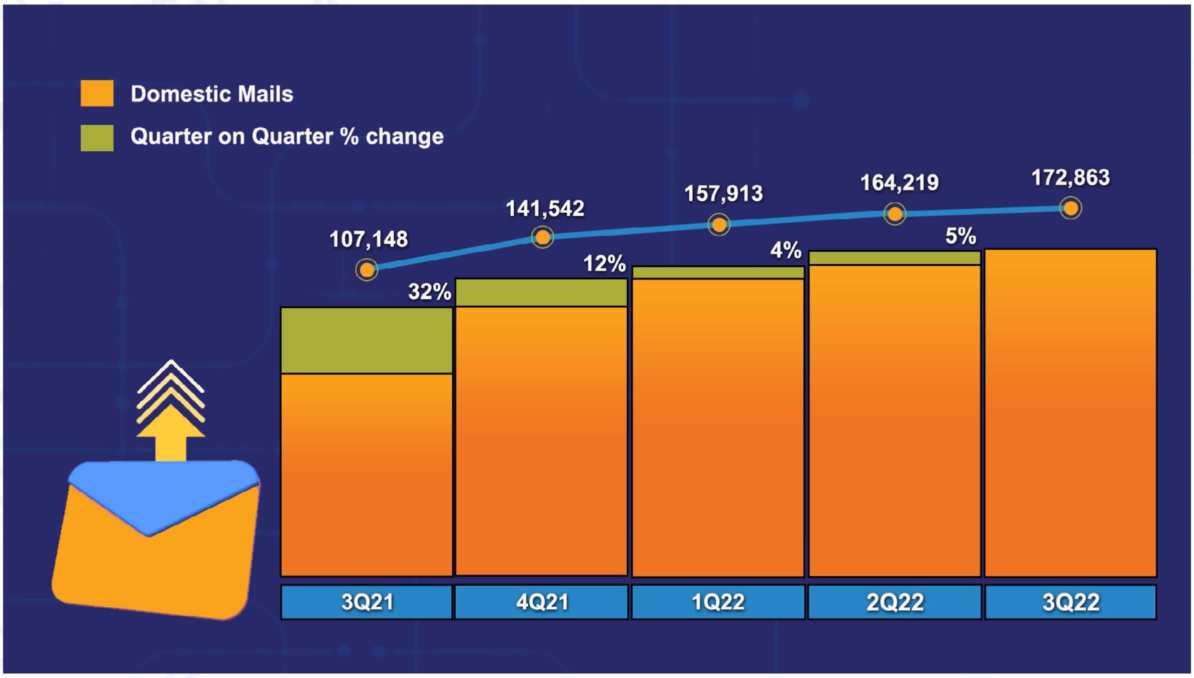
In order to extend services to the people at the grassroots, some of the post and courier operators have continued to open up outlets in different parts of the country as well as having more agents to work with. Over **75% of the districts in Uganda** have access to postal and courier services.



In the period ending September 2022, the number of postal operational outlets grew from 213 outlets to **215** outlets in 3Q22. In terms of year-on-year comparison, the number of operational post and Courier outlets grew by more than 15 outlets, translating into a 9% growth.

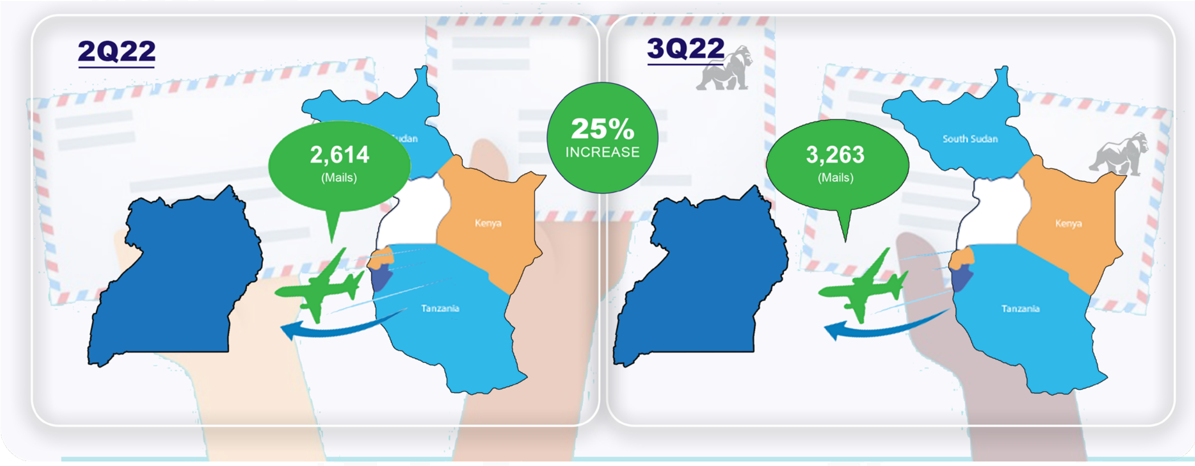
7.2 Domestic mail volumes

In 3Q22, the domestic mail volume grew to the tune of **172,863 mails**, up from 164,219 mails registered in 2Q22. This is a **5% quarter-on-quarter growth**. The growth in domestic mail volumes is largely attributed to the increased demand for door-to-door delivery services of e-commerce purchases, as well as the expanded fleet owned by most courier operators such as DHL, Hygiene couriers, CourieMate, Godel, Big Orange, Nation courier, S-M Cathan Logistics, Sail Courier, and UPL, among others.



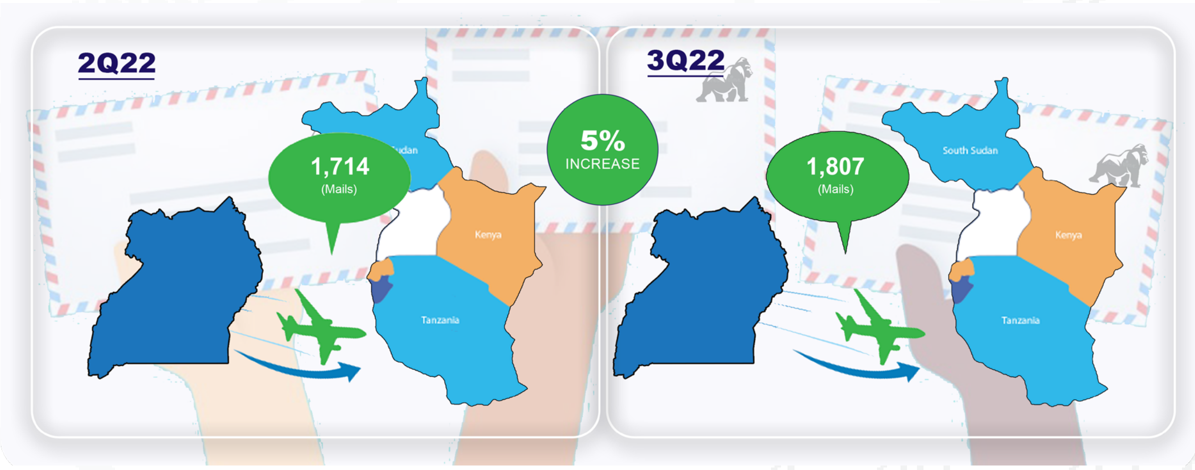
7.3. East Africa In-bound

In the period ending September 2022, the East Africa in-bound mail volume deliveries increased to **3,263 mails**, up from 2,614 mails in 2Q22, translating into 25% quarter-on-quarter growth.



7.4. East Africa Out-bound

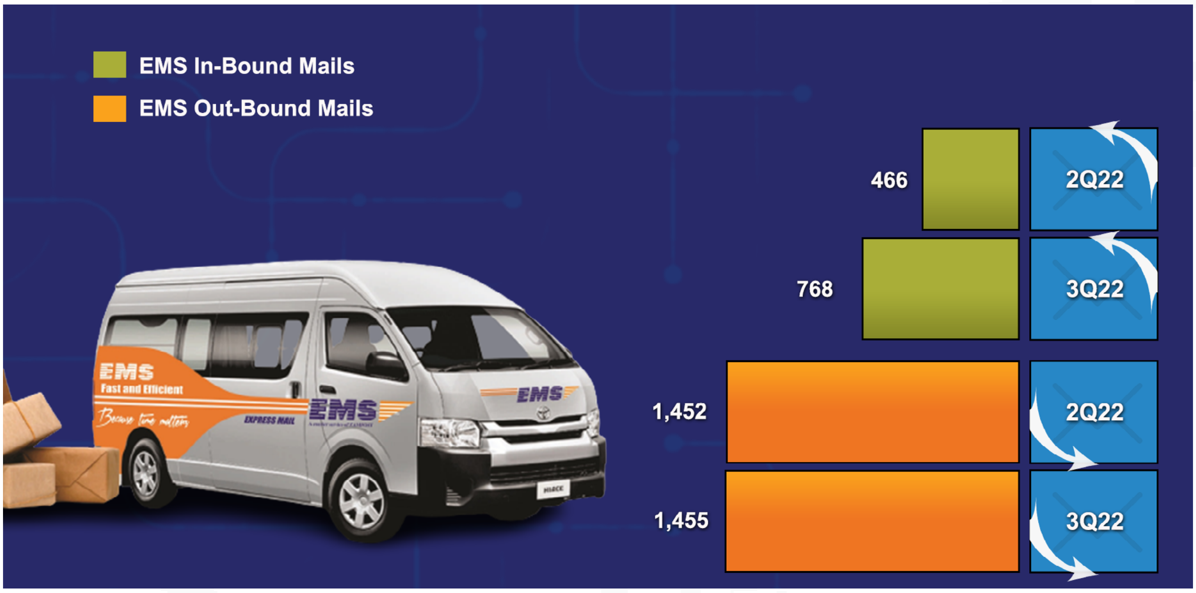
During the July to September 2022 time-frame, the volume of outbound mail to East Africa increased to **1,807 mails**, which is higher than the 1,714 mails recorded in the second quarter of 2022.



7.5. EMS international mail Volumes

The Expedited Mail Service (EMS) is an exclusive service provided by the National Designated Operator, UPL. It is a global brand designating the postal product with the fastest delivery.

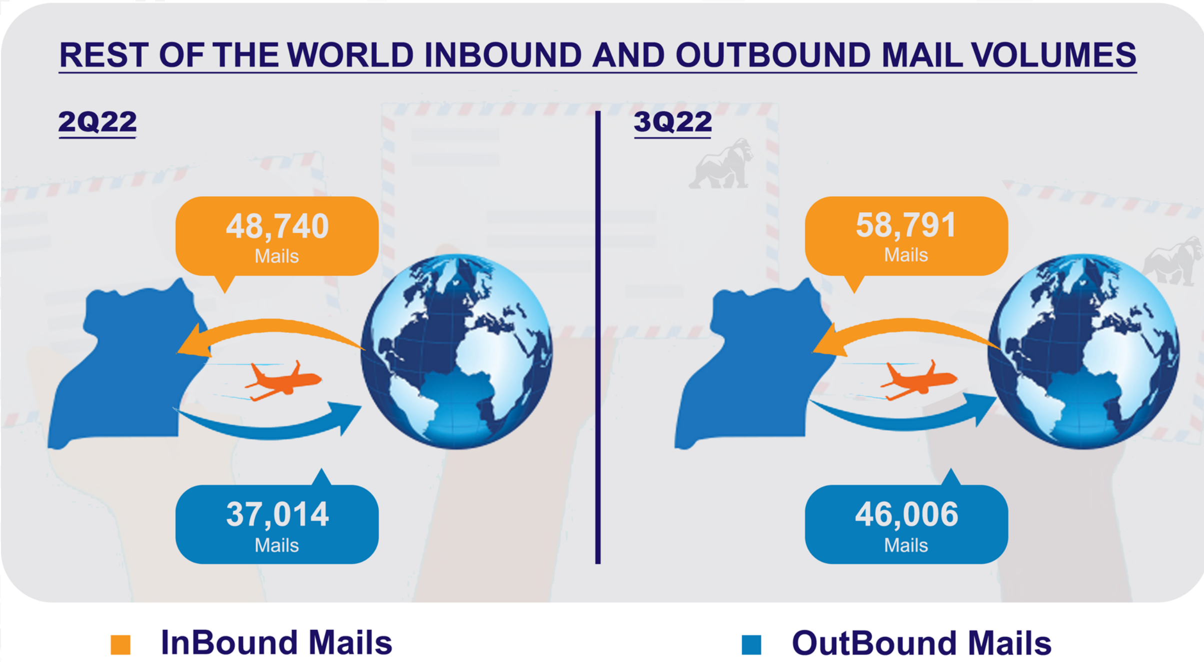
EMS - in bound international mail volume grew to **768 mails** in 3Q22, up from 466 mails registered in 2Q22, translating into a 65% quarter-on-quarter growth. On the other hand, EMS -outbound international mail volume grew from 1,452 in 2Q22 to **1,455 mails** in 3Q22, registering a 0.2% quarter- on-quarter increase.



7.6. Rest of the World mail volumes

In 3Q22, the mails sent to Uganda from the Rest of the World increased from 48,740 mails in 2Q22 to **58,791 mails** in 3Q22, registering a 21% quarter-on-quarter growth.

On the other hand, the mail volumes sent from Uganda to the Rest of the World grew from 37,014 mails in 2Q22 to **46,006 mails** in 3Q22, registering 24% quarter-on-quarter growth.



Broadcasting and Multi Media

8.1. Uganda Goes Big on the International Movie Scene

Tembele, by Morris Mugisha was selected to represent Uganda as the qualifying feature film for consideration for the Best International Feature Film award at the 95th edition of the Academy of Motion Picture Arts and Sciences Awards, known as the Academy Awards, or simply the Oscars.

Tembele has received ten nominations from Africa's biggest movie award festival, Nigeria's Africa Movie Academy Awards (AMAA) 2022, in the categories of; Best Film in an African Language, Best Achievement in Costume Design, Best Achievement in Soundtrack, Best Achievement in Sound, Best Achievement in Cinematography, Achievement in Screenplay, Best Actor in A Leading Role, Best Actress in a Leading Role, Best Director and Best Film. The film managed to win Best Achievement in Cinematography at the 2022 Africa Movie Academy Awards.

"Bedroom Chains" by Hassan Mageye received 11 nominations in the Lake International Pan-African Film Festival (IPAFF), which was held in the USA. These are; Best Feature Film, Best Cinematography, Best Script Writer, Best Actor, Best Actress, Best Director, Best Sound Designer, Best Editor, Best Production Design, Best Film on Social Change, and Best Film on Human Rights.

It received other nominations in The African Film and Arts Festival, Silicon Valley Film Festival, and Durban International Film Festival

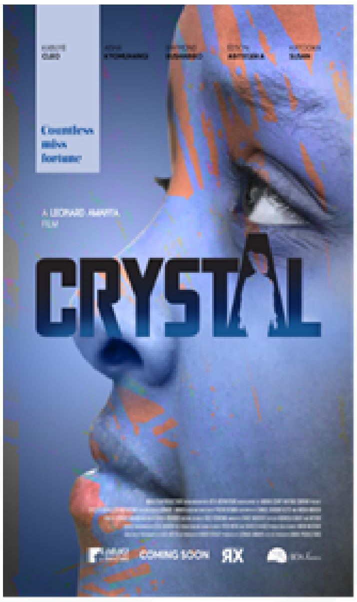
8.2. "Crystal-Countless Misfortune" makes Uganda shine in Nigeria

Ugandan movie "***Crystal-Countless Misfortune***" by Leonard Amanya was selected in 8 categories at the Universal Movie Awards in Nigeria. The film won Best Story and Best Actor in a Female Category. The film has further won other awards, including Honorable Mention for Best Educational Film at Fox International Film Festival (Poland), Best Actress at Future of Film Awards (North Macedonia), Best Actor in a Feature Film at the 1st Monthly Film Festival (Belgrade, Bulgaria), Best Actress at Tokyo Film Awards, Best Actress at Budapest Movie Awards (Hungary), Special Recognition at DJẠRFOGO

International Film Festival in Cape Verde, Silicon Valley International Film Festival (SVIFF) in California-USA, TopShot International Film Festival.Other selections include: Zambia International Film Festival(Zambia), and 9th edition of the Cotonou International Digital Cinema Festival (Benin).

Amanya's documentary, "***Flight to Extinction***" also received an official Selection at the Best Film Awards film festival for Best Documentary Award 2022/23.

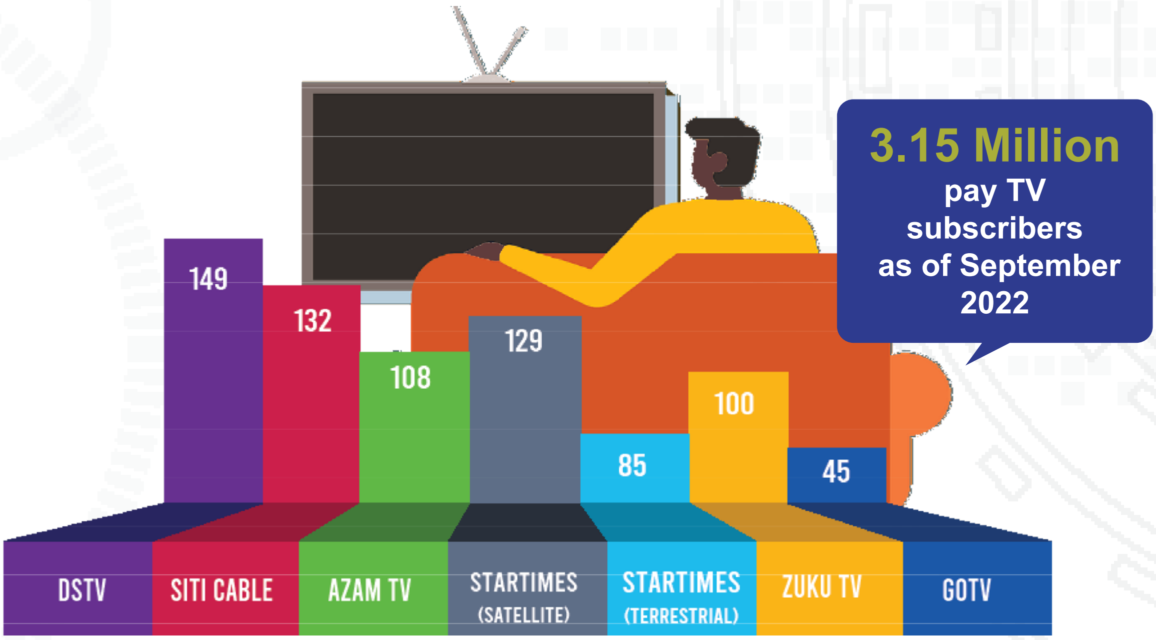
Other Ugandan produced films that made it on the global platform are; "***Your Turn***" by Lillian Kirungi, which was selected to screen at the Silicon Valley African Film Festival, and "***Time***" produced by KPM Entertainment that was selected to screen at the Pinton International Film Festival Global (PIFF Global) in USA.



8.3. Pay TV Subscriptions

During the period July-September 2022, the total active pay TV subscribers increased from 2.2 million to **3.15 million,** translating into 45% quarter-on-quarter growth. This increase is attributed to the introduction of new content and reopening of the football leagues across the globe that have heightened the subscriber bases.

i.) Channel distribution per Pay-TV



ii.) Value Bouquet Prices as of September 2022

Value Bouquet Prices			
Station	Bouquet	Price (UGX)	Channels
DSTV	Lumba	15,000	Over 50
SitiCable	Ugandan	15,000	80
Go TV	GoTV Lite	14,000	Over 10
StarTimes (Sattelite)	NOVA	13,500	31
StarTimes (Terrestrial)	NOVA	12,000	54
Zuku TV	Smart	12,000	62
Azam TV	Azam Pure	10,000	68

iii.) Premium Bouquet Prices as of September 2022

Premium Bouquet Prices			
Station	Bouquet	Price (UGX)	Channels
DSTV	Premium	255,000	140
SitiCable	Asian	85,000	142
StarTimes (Sattelite)	Chinese	80,000	21
Go TV	GoTv Supa	58,000	Over 50
Zuku TV	Asian (buy through)	42,700	57
Azam TV	Azam Play	37,000	128
StarTimes (Terrestrial)	Classic	28,000	14

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