



UGANDA
COMMUNICATIONS
COMMISSION

Market Performance Report Q3 2024 (Jul - Sep 2024)



Industry Snapshot September 2024



49.3
Million

Mobile
Registered
Subscriptions



Mobile Money Registered
Subscriptions

45.6M
44.2 MILLION

*Statistics from BOU



Domestic
Mails

303,412
244,021



Mobile Subscriptions
(Active 90 Day)

40.0M
38.5 MILLION



Mobile Money Active
Subscriptions (90 Day)

30.4M
29.4 MILLION

*Statistics from BOU



East Africa
Inbound Packages

17,289
10,100



Mobile Internet Subscriptions
(Active 90 Day)

17.2M
16.4 MILLION



Mobile Money
Transaction Counts (UGX)

1.96B
1.84 BILLION

*Statistics from BOU



East Africa
Outbound Packages

5,050
3,489



On-Net Traffic (Minutes)

19.1B
18.6 BILLION



Smartphones

17.3M
16.7 MILLION



Express Mail
Inbound (EMS)

2,596
1,698



Off-Net Traffic (Minutes)

1.0B
918.6 MILLION



Towers

5,158
5,104



Express Mail
Outbound (EMS)

2,047
2,035



Internet Traffic (GBs)

218.1M
195.7 MILLION



Fibre (Kilometres)

44,910
36,984



Rest of Africa
Incoming Packages

5,287
2,550



ONA Incoming Traffic
(Minutes)

284.7M
282.6 MILLION



Gross Telecom
Revenue (UGX)

1.69 TRILLION
1.66 TRILLION



Rest of Africa
Outgoing Packages

1,838
2,081



ONA Outgoing Traffic
(Minutes)

27.8M
28.8 MILLION



International Incoming
Traffic (Minutes)

15.8M
18.3 MILLION



International Outgoing
Traffic (Minutes)

7.6M
7.5 MILLION



Q3 2024



Q2 2024

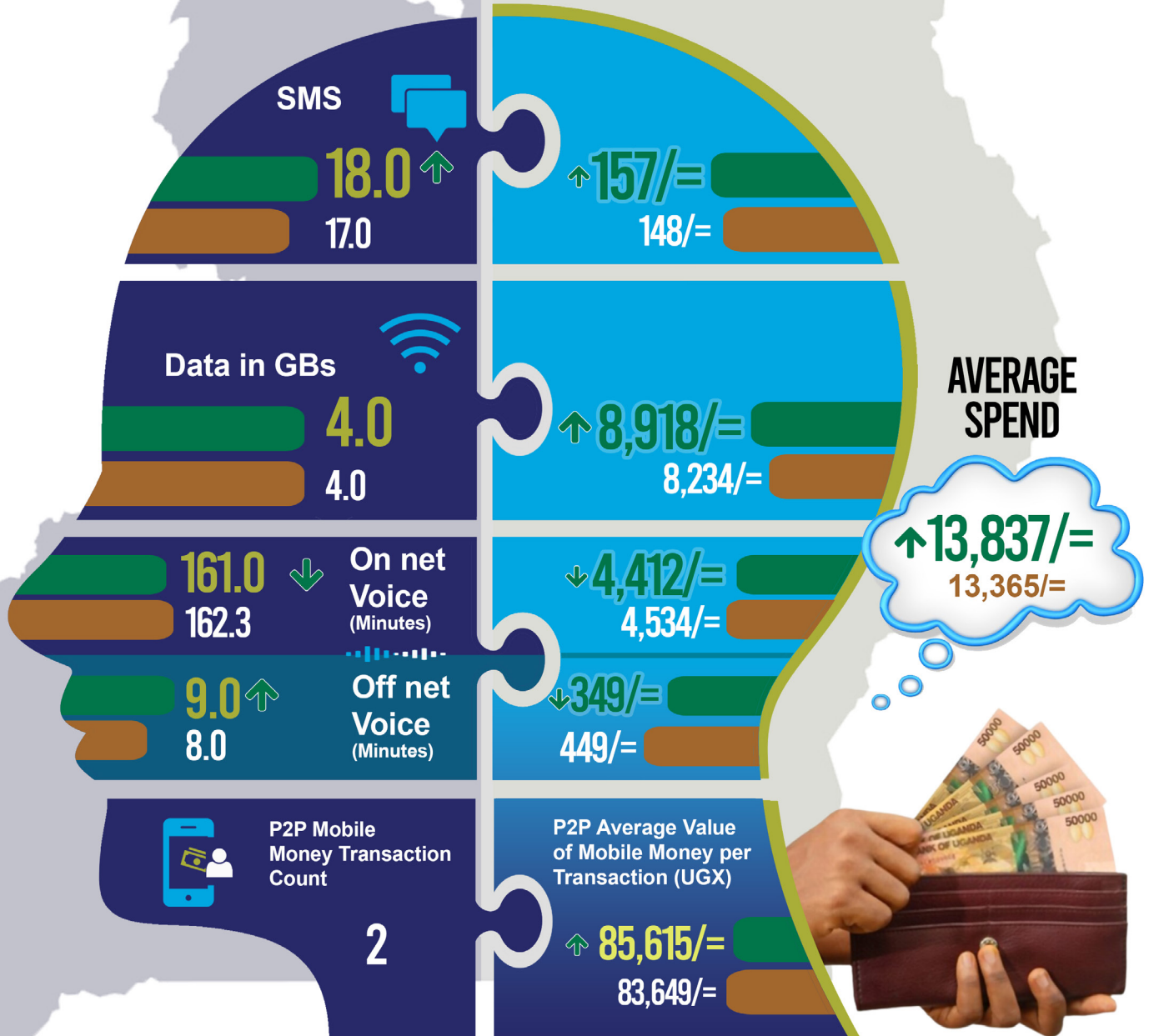


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September 2024 Average User Profile

Average Monthly Service Usage (Volumes)

Monthly Service Usage Spend (UGX)



● Q3 2024

● Q2 2024



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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 third quarter of 2024, starting July to September 2024. The report covers:

1. Domestic Highlights
2. Service Access and Subscriptions
3. Traffic and Usage
4. Financial Performance
5. Post and Courier Sector
6. Broadcast and Multimedia

Domestic Highlights



Key Headlines (Jul - Sep 2024)

THE GLOBAL SYMPOSIUM FOR REGULATORS (GSR-24)

1 - 4 July 2024 | Kampala, Uganda



600+
delegates in
attendance from
over 77 countries.



45
contributions received to the
GSR-24 Best Practice Guidelines
Consultation carried out under the
theme "*Charting the Course of
Transformative Technologies for
Positive Impact*".



The four-day ITU GSR-24 at Speke Resort Convention Centre Munyonyo provided a platform for regulators, policy makers and industry leaders from around the world to hold impactful conversations on emerging issues in the digital ecosystem with a view to strengthen the impact of regulation of the ICT sector in the digital age.

The Vice President of Uganda Maj (Rtd) Jessica Alupo (centre) presided over the opening ceremony, flanked by Dr Chris Baryomunsi, the Minister of ICT and National Guidance (2nd left), Ms Doreen Bogdan-Martin, the ITU Secretary General (2nd right), Dr Cosmas Luckyson Zavazava, the Director Telecommunication Development Bureau (extreme left) and Hon. Nyombi Thembo, the GSR-24 chairperson and UCC Executive Director (extreme right).

GSR-24 Kampala, Uganda.



INDUSTRY NEWS



3rd July 2024

President Yoweri K. Museveni hosted Lyca Mobile Telephone company investors at State House Entebbe. The delegation was led by the company chairman Subaskaran Allirajah. President Museveni conveyed his appreciation for Lyca Mobile's affordable services.



11th July, 2024

UCC commenced a nationwide crackdown against unprofessional and illegal providers of media services in Uganda. The development followed widespread allegations of extortion, malice, and defamation by these media outlets. UCC issued warnings and fines to several broadcasters for violations, including spreading misinformation and failing to ensure accurate content. UCC emphasizes the importance of responsible media practices and the need for compliance to protect the public interest.



3rd September 2024

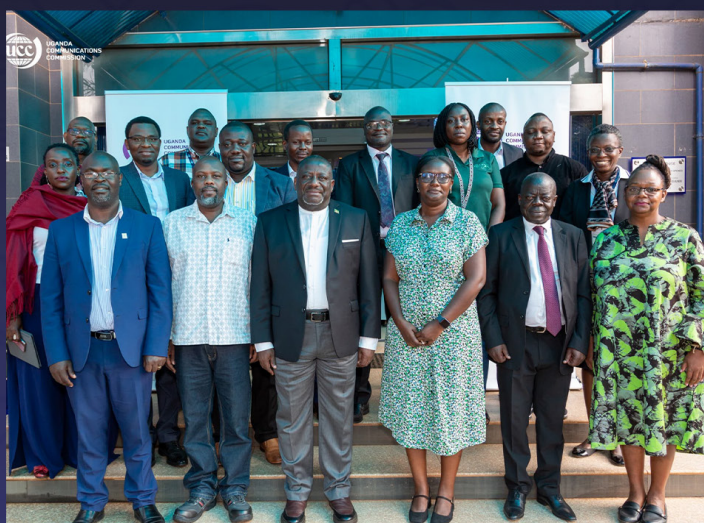
The Department of Journalism and Communication at Makerere University hosted the Annual Media Convention (AMC) under the theme "*Harnessing Artificial Intelligence and Social Networks to Combat Misinformation in Uganda*". In his remarks, Hon. Kabyanga Baluku expressed his great satisfaction with the partnership between the UCC, the Department of Journalism and Communication, and Makerere University in organizing the Annual Media Convention. Hon. Kabyanga also pointed out that AI can both help to combat and contribute to the spread of misinformation.

UCC INITIATIVES



1st - 26th July 2024

UCC/UCUSAF launched a mobile application specifically designed to support visually impaired learners in accessing educational materials. To ensure effective usage of the app, UCC distributed 100 smartphones, conducted training sessions across four schools, engaging a total of 109 visually impaired students and 33 teachers.



4th July, 2024

UCC established an Artificial Intelligence (AI) task force aimed at creating a framework for the adoption and utilization of artificial intelligence in Uganda. The task force will focus on developing policies that promote responsible AI use, enhance innovation, and improve service delivery in Uganda. This is aimed at ensuring that technology is effectively integrated into various sectors while addressing ethical and regulatory concerns.



5-15th September 2024

UCC took the local film promotion agenda to Canada, with an appearance at the Toronto Film Festival (TIFF). The highlight for Uganda during the 10-day festival was 'Uganda Day', featuring the screening of Nisha Kalema's film Makula, which won Best Feature Film at the Uganda Film Festival (UFF) in June 2024.



Besides Nisha Kalema, the festival was also attended by Jerry Sesanga Sentomero, the producer of The Lions of Buganda, which won Best Indigenous Film at UFF 2024. Both Ms Kalema and Mr Sesanga had their trips to Toronto fully sponsored by UCC as part of their UFF 2024 winning packages.

Service Access and Subscriptions



Q3 2024 Subscriptions



40.0 Million

Active Mobile Subscriptions

181.7 Thousand

Fixed Line Subscriptions

Devices and Terminals



2.4 Million
Basic Phones



26.3 Million
Feature Phones



17.3 Million
Smart Phones

Subscriptions



45.6 Million

Mobile Money
(Registered)

17.2 Million

Mobile Internet

92.6 Thousand
Fixed Internet

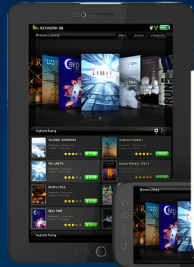
Traffic and Usage



Q3 2024 Traffic



**1.96
Billion**
Mobile Money
Transactions



**218.1
Million**
GigaBytes (GBs)
Downloaded



**15.9
Billion**
USSD
Sessions



**19.1
Billion**
Domestic On
Net Minutes



**1.0
Billion**
Domestic Off
Net Minutes



**284.7
Million**
One Net Area
(ONA) In Minutes



**27.8
Million**
One Net Area
(ONA) Out Minutes



**15.8
Million**
International
Voice In Minutes



**7.6
Million**
International
Voice Out Minutes



Financial Performance



Q3 2024 Telecom Revenue



Post and Courier Sector Highlights



Q3 2024 Post and Courier Overview

2,047

Express Mail Service
(EMS) Outbound



17,289

East Africa
Inbound



5,050

East Africa
Outbound



303,412

Mails Delivered
Country-wide



2,596

Express Mail Service
(EMS) Inbound



143,231

Rest of the World
Inbound



177,846

Rest of the World
Outbound



Broadcast and Multimedia



Q3 2024 Broadcasting Overview

Country Mapping for The Pay-TV market in Uganda



DStv
Satellite

Country
Wide

zuku
Satellite

Country
Wide

azamTV
Satellite

Country
Wide

StarTimes
Satellite

Country
Wide

StarTimes
Terrestrial

Kampala, Wakiso,
Mpigi, Masaka,
Mbarara, Fortportal,
Jinja, Mukono,
Kalangala, Luweero,
Gulu and Mbale

GOtv
Terrestrial

Kampala, Jinja,
Iganga, Mbale, Lira,
Gulu, Arua, Kasese,
Mbarara,
Masaka and Wakiso

SIMBA TV
Cable

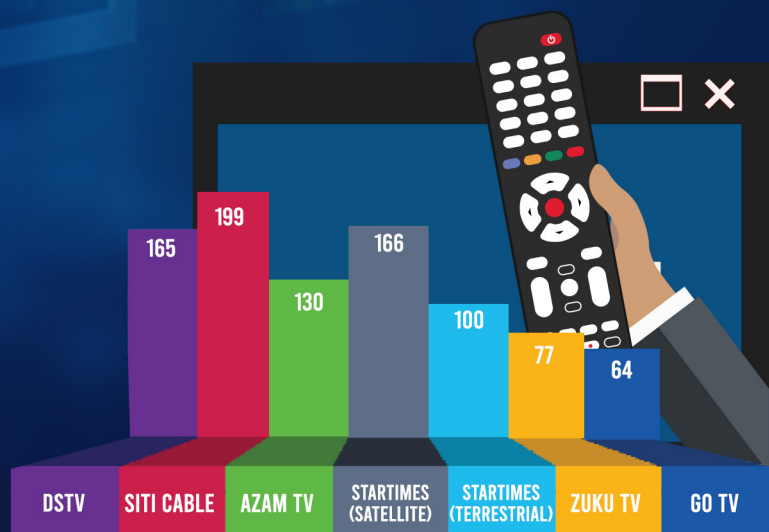
Kampala & Jinja

PAY TV (SEPTEMBER 2024)

1.10
Million
Subscribers



Channels Offered



Film and Cinema



AWARD WINNERS

Sharon Ishimwe



Toronto International Nollywood Film Festival (September 2024)

Ssekukkulu, produced by Sharon Ishimwe won Best Film - Africa at the Toronto International Nollywood Film Festival 2024.



Film: Ssekukkulu (2023)

Genre: Comedy, Drama

Directors: Sharon Ishimwe and Namanya Gerald Rugaba

Writers: Josephine Kabahuma and Kizito Samuel Saviour

Cast: Agume Mark, Edson Keith Abitegeka, and Patience Kihunde Akiiki

Plot: Three siblings are back together to celebrate Christmas at their family home in a picturesque town in rural Uganda. However, past and present conflicts threaten to tear them apart despite strong family bonds.

Available to watch: In select cinema halls starting 15th December 2024



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