UGANDA COMMUNICATIONS COMMISSION

Annual Communications Sector Report 2024

Bridging the ICT Access and Usage Gaps

February 6, 2024
UCC Unveils Solar-Powered Telecom Site in Agago District

The Uganda Communications Commission (UCC), through its Uganda Communications Universal Service and Access Fund (UCUSAF), officially launched a solar-powered telecom site in Lapono, Agago district, on February 6, 2024. The event was attended by Hon. Nyombi Thembo, Executive Director of UCC, and Hon. Chris Baryomunsi, the Minister of ICT&NG. The initiative aims to bridge network access gaps in rural and underserved regions, leveraging sustainable solar technology to extend connectivity where commercial telecom providers have been reluctant to invest. The launch also highlighted plans for an additional 63 sites to be rolled out by Towerco Africa, underscoring the government's commitment to equitable telecommunications access and inclusive digital transformation for all Ugandans, regardless of location or economic status

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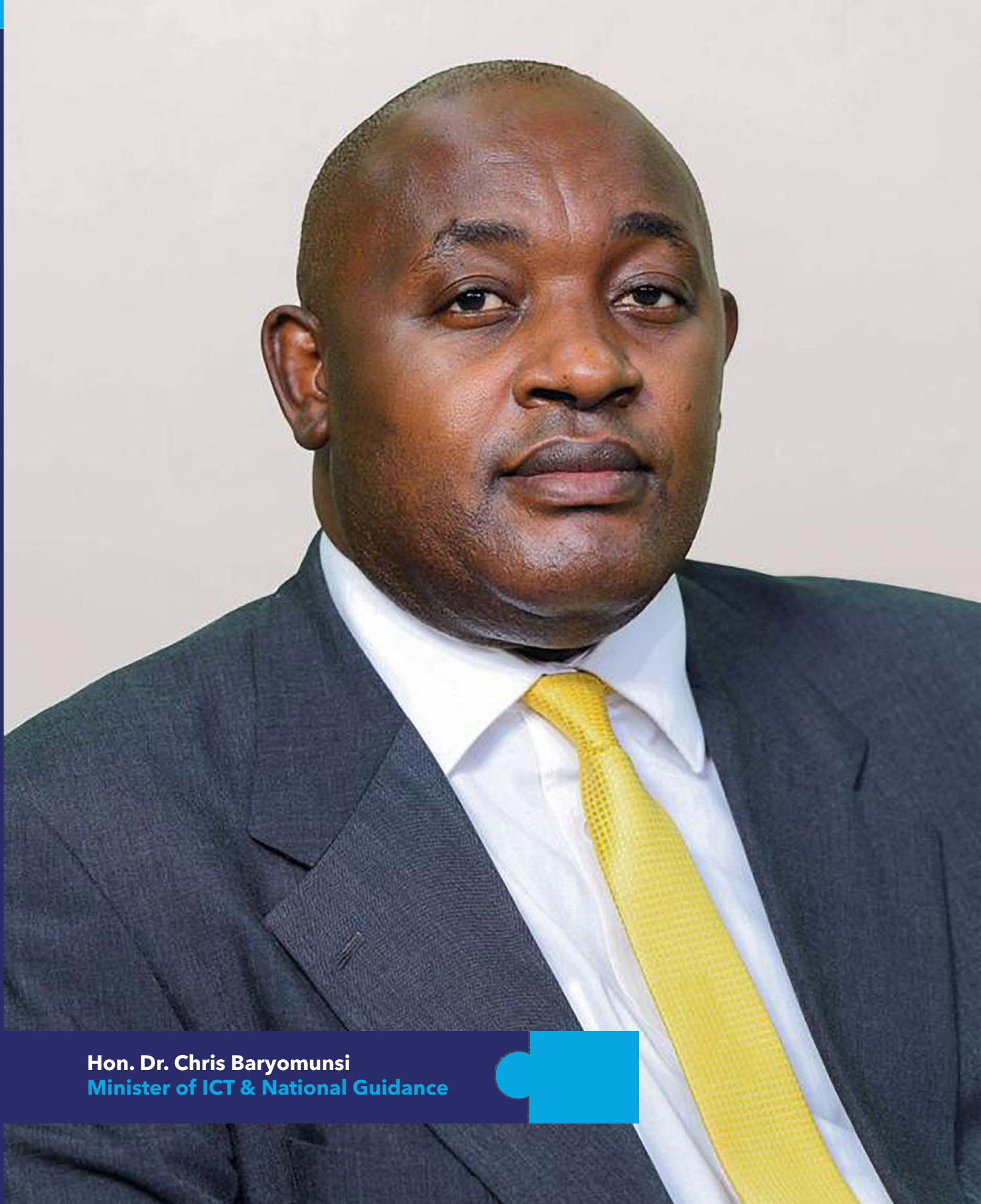
Acronyms

4G	Fourth Generation of Cellular Network Technology
AFRIFF	Africa International Film Festival
AHRFF	Africa Human Rights Film Festival
AI	Artificial Intelligence
AMAA	African Movie Academy Awards
ARPU	Average Revenue Per Unit
ATC	American Tower Corporation
BSIFF	Black Star International Film Festival
CAGR	Compound Annual Growth Rate
CDSP	Content Development Support Programme
CRM	Customer Relationship Management
DAB	Digital Audio Broadcasting
DStv	Digital Satellite Television
DTH	Direct-to-Home
DTT	Digital Terrestrial Television
EACO	East African Communications Organization
EBITDA	Earnings Before Interest, Tax, Depreciation and Amortization
EMF	Electromagnetic Fields
ERP	Enterprise Resource Planning
FTA	Free-To-Air
FTTH	Fiber To The Home
FTTX	Fiber to the "x"
GBs	Gigabytes
GOU	Government of Uganda
ICT	Information and Communications Technology
IDTV	Integrated Digital Television
IPO	Initial Public Offering
IPTV	Internet Protocol Television
ITU-T	International Telecommunication Union - Telecommunication Standardization Sector
LTE	Long Term Evolution
MBPs	Megabits Per Second
MNOs	Mobile Network Operators
MPLS	Multi-Protocol Label Switching
MTN	Mobile Telephone Network
MTR	Mobile Termination Rate
NITA-U	National Information Technology Authority Uganda
ONA	One Network Area
OTT	Over-The-Top
PAYE	Pay As You Earn
RF	Radio Frequency
RFC	Regional Film Competition
RFTA	Regional Free to Air
RGS-90	Revenue Generating Subscribers in 90 Days
ROE	Return on Equity
SLAs	Service Level Agreements
SMEs	Small and Medium Sized Enterprises
SSNIP	Small but Significant and Non transitory Increase in Price
TV	Television
UAE	United Arab Emirates
UCaaS	Unified Communications as a Service
UCUSAF	Uganda Communications Universal Service Access Fund
UFF	Uganda Film Festival
UGX	Uganda Shillings
UNBS	Uganda National Bureau of Standards
URA	Uganda Revenue Authority
USD	United States Dollars
USE	Uganda Stock Exchange
UTCL	Uganda Telecommunications Corporation Limited
Vo-IP	Voice over Internet Protocol
VPN	Virtual Private Network
WANS	Wide Area Network Solutions
WRC	World Radiocommunication Conference



Hon. Dr. Chris Baryomunsi
Minister of ICT & National Guidance

Foreword by the Minister of ICT & National Guidance

In an increasingly interconnected world, Information and Communication Technologies (ICTs) have become essential enablers of national development. From transforming governance and enhancing service delivery to opening up new economic opportunities, ICTs are a powerful catalyst for inclusive growth and social transformation.

The mandate of the Ministry of ICT and National Guidance is to help the government to leverage ICTs for this objective through provision of strategic and technical leadership, overall coordination, support and advocacy on all matters of policy, laws, regulations and strategy for the communications sector.

However, this vision cannot be realised without the full participation of a critical mass of citizens in the digital economy. That is why in 2023 the Ministry developed the Digital Transformation Roadmap whose overall objective is to integrate ICTs in all aspects of life so that they can ultimately drive Uganda's development agenda.

The government is keenly aware that for ICTs to be truly transformative, they must be accessible, affordable, and meaningfully used by all segments of the population, regardless of location, age, gender, or socio-economic status. Therefore, bridging the digital divide is not just about infrastructure deployment, it is also about empowering citizens with the digital literacy, tools, and confidence they need to participate meaningfully in the digital economy.

I am encouraged by the progress we have made, including expanding mobile and broadband coverage, promoting local content, implementing the National Broadband Policy, and operationalising the Personal Data Protection Office, among other milestones. However, as this report also highlights, significant work still lies ahead, especially in rural and underserved areas where access and usage gaps remain apparent.

I commend the Uganda Communications Commission for its continued stewardship of the sector and for producing this Annual Communications Sector Report, which is a valuable resource for policymakers, industry actors, researchers, and development partners.

As we look to the future, I urge all stakeholders, including government agencies, the private sector, academia, civil society, and our international partners to work collaboratively and innovate boldly to accelerate Uganda's journey toward a digitally inclusive and empowered society.

Good reading!

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

Message from the Permanent Secretary

It is my distinct honor to present the Annual Communications Sector Report for Uganda. This report is more than a collection of data; it is a strategic compass, highlighting the transformative forces shaping our digital landscape and guiding our path towards a more connected and prosperous nation. As we reflect on 2024, we must also look ahead to the emerging challenges and opportunities that will define our future

One such challenge, and indeed a powerful opportunity, is the growing presence of Artificial Intelligence (AI) within the telecommunications sector. AI is no longer a distant concept; it is an active force that demands our attention. While it presents significant benefits in enhancing our knowledge, social interactions and life, it also poses a growing threat to cybersecurity and data privacy. We must therefore be proactive in developing a robust national AI policy framework to ensure ethical use, safeguard citizen data, and foster an environment of trust and innovation.

We are witnessing a convergence of industries. The traditional postal service, once a pillar of physical communication, is now finding a new and vital role in the age of e-commerce. As online shopping and digital platforms flourish in Uganda, there is a growing need for reliable "last-mile" delivery. Our postal infrastructure, with its wide-reaching network, is uniquely positioned to meet this demand, creating a powerful synergy between the digital marketplace and physical logistics. This convergence will not only strengthen the e-commerce ecosystem but also provide a new lease of life for traditional services, creating jobs and stimulating economic activity across the country.

Our commitment to universal access remains a top priority, and we are now exploring new frontiers to bridge the digital divide. The advent of satellite broadband services offers a solution to connect the most remote and underserved regions of Uganda. By onboarding these services, we can overcome geographical barriers and bring high-speed internet to every corner of our nation, empowering farmers, students, and entrepreneurs with the tools they need to thrive in the digital economy.

Finally, we must not underestimate the profound influence of broadcasting services, especially as we approach the electoral season. Broadcasting is a powerful tool for shaping public opinion, disseminating information, and fostering democratic dialogue. It is therefore paramount that we ensure all broadcasting platforms are filled with high-quality, truthful, and educational content that empowers citizens to make informed decisions. By upholding standards of good journalism and promoting responsible content creation, we can ensure that our airwaves serve as a force for good, promoting national unity and a healthy, informed democracy.

In closing, this report serves as a call to action. It is a reminder that the digital future is not something that happens to us; it is something we actively create. By strategically addressing the opportunities and threats of AI, fostering the convergence of e-commerce and postal services, leveraging satellite technology for universal access, and ensuring the integrity of our broadcasting platforms, we can secure Uganda's place as a leader in the digital age.

Hon. George William Nyombi Thembo
Executive Director, UCC

Message from the ED

I am delighted to present to you the Commission's Annual Communications Sector Report 2024. This report offers a comprehensive account of the sector's key developments, performance indicators, and emerging trends over the past year. It is designed to serve as a valuable reference for industry stakeholders, policy makers, academia, and the public, providing insights to inform decision-making, research, and strategic planning.

Under the theme Bridging the ICT Access and Usage Gaps, this year's report underscores one of the most critical imperatives in Uganda's digital transformation agenda: ensuring that no citizen is left behind in accessing and benefitting from ICTs. While significant strides have been made in expanding infrastructure, increasing mobile penetration, and fostering innovation, challenges remain, especially in rural and underserved areas where access and digital literacy are still lagging.

In a rapidly evolving technological environment, staying informed and adaptive is not a luxury, it is a necessity. Every day, new innovations emerge, reshaping how communication services are delivered and consumed. For a regulator, this dynamic reality demands not only vigilance, but foresight, agility, and collaboration.

To remain ahead of the curve, the Commission continues to invest in research, benchmarking, and strategic partnerships with local and international institutions and individuals. A notable example of such efforts is the establishment of the Artificial Intelligence Task Force during the year, which has developed a comprehensive concept note that will guide the Commission and the Government on various aspects of AI.

This report is one of the key channels through which we document and communicate the outcomes of such initiatives. It reflects our commitment to transparent, evidence-based regulation and to enabling a communications sector that is inclusive, resilient, and future-ready.

I extend my sincere appreciation to the dedicated team at UCC who worked tirelessly to produce this publication, and to all our stakeholders who continue to support our mission of transforming Uganda's communications landscape.

I invite you to read this report with interest and use it as a springboard for deeper engagement in shaping a more connected and empowered Uganda.

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

Message from the Director Economic Regulation Content and Consumer Affairs

Bridging the Access and Usage Gap

As the Commission presents the Annual Communications Sector Report for 2024, we take note of the remarkable resilience and innovation that continue to define our sector. This year's theme, Bridging the Access and Usage Gap, encapsulates our collective resolve to transform Uganda's communications landscape into one where every citizen—regardless of geography, socioeconomic status, or background—can fully harness the power of digital connectivity. In a world accelerating toward a fully interconnected future, closing this gap is not merely an aspiration; it is the cornerstone of sustainable economic growth, social equity, and national development.

The past year has been one of purposeful progress amid evolving challenges. Uganda's communications sector has witnessed a surge in infrastructure deployment, with broadband penetration reaching new heights through expanded fiber optic networks and the rollout of 5G pilots in urban and peri-urban areas. Mobile subscriptions have climbed to over 40 million, while internet users now exceed 15 million—a testament to the sector's vitality. Yet, beneath these gains lies the persistent reality of disparities: rural communities often lag in access, and even where connectivity exists, usage remains uneven due to affordability barriers, digital literacy deficits, and content relevance. This report illuminates these dynamics, showcasing how the Commission, in partnership with licensed operators, has intensified efforts to narrow these divides.

At the heart of our regulatory mandate is the promotion of equitable access. Pricing interventions have driven down data costs making services more inclusive, while our consumer protection mechanisms– including a revamped complaints resolution portal—have resolved over 80% of disputes within 48 hours, empowering users to engage confidently. In partnership with our licensees, security agencies and communities, we have continued to address infrastructure vandalism that is a major barrier to investment and cost to our sector.

As we look to the future of our digital journey, the Commission is committed to bolder actions: accelerating network coverage, and forging public-private partnerships to achieve higher internet usage parity by 2030. By bridging the access and usage gap, we are not just connecting devices; we are unlocking human potential, driving GDP contributions from the sector toward double digits, and building a truly inclusive digital Uganda.

I invite you to explore this report, which chronicles our shared journey and charts the road ahead.

2024 Snapshot

Telecom

Registered Mobile Subscriptions (Millions)

51M

Active 90 Day Mobile Subscriptions (Millions)

41.6M

37M

Active 90 Day Mobile Money Subscriptions (Millions)

32.1M

27.5M

Active 90 Day Mobile Internet Subscriptions (Millions)

15.7M

13M

Smartphones (Millions)

18.3M

15M

Unique Mobile Subscriptions (Millions)

14.7M

13.3M

Broadcasting

Licenced FM Radio Stations

290

Pay TV Active Subscriptions

1.0M

Local TV Stations

72

Postal and Courier

Domestic Courier Traffic

35,639

EA Courier Traffic

73,850

International Courier Traffic

117,996

2024 2023 M Million **Active Subscriptions** Subscriptions that are active for at least 90 days

Executive Summary

The Telecommunications, Post and Broadcast Multimedia Space in Uganda has yet again posted significant growth in 2024, largely driven by sustained demand for data services, continued expansion of mobile financial services, infrastructure investments and strategic regulatory stewardship across the value chain.

Increased competition in data services coupled with regulatory efforts towards enhanced consumer protection and service quality have continued to shape the marketplace, specifically with the pricing shifts. Prime examples of these shifts have been the mainstreaming of non-expiry bundles in the mobile broadband space and all-network calling bundles such as Freedom Minutes and Chillax Bundles.

Spectrum reforms also rekindled new investment in 5G with 5G infrastructure deployments and investment gaining momentum in 2024, positioning the country favorably against regional peers, despite still lagging behind global leaders in the high speed fixed broadband service. On the coverage front, coverage obligations imposed upon the different infrastructure providers have seen an additional 140 passive sites deployed in 2024.

The sector indicators point towards a resilient sector that continues to be a key enabler of Uganda's digital economy. The sector's financial performance has been underscored by growing turnover in the telecom and multimedia space with the telecoms posting UGX 6.5 Trillion in revenue.

In terms of tax contribution, the sector posted an aggregate contribution of UGX 7.2 Trillion in VAT, import duties, excise tax, PAYE, income and corporate tax, among other tax classes. This positions our sector among the top 3 tax generating sectors for Uganda.

The mobile financial services space continues to be a bundle of innovation with continuous new services in agriculture, transport, leisure and entertainment, investment, and pension planning, among other sectors.

The rise of online shopping has fundamentally reshaped the post and courier landscape. Rather than simply delivering mail, the sector is now a critical part of the e-commerce ecosystem, focusing on services like order fulfillment, last-mile delivery, and logistics for ride-hailing services. This shift has required the development of more agile and efficient systems to meet the demands of online consumers and businesses.

Our post and courier traffic that totaled 711 tonnes in 2024 is largely driven by robust trade flows originating from the East African Community (EAC) corridor, highlighting the critical importance of regional integration. Beyond the immediate region, our global business partners in Asia, Europe, and the Middle East contribute substantially to the volume of international courier traffic, reflecting Uganda's growing connectivity to global supply chains.

The media landscape is shifting as consumers move away from traditional television to online content platforms such as Netflix and YouTube. This change presents a dynamic new environment for both viewers and content creators.

The growing preference for online streaming and on-demand content has altered how people consume media. Platforms such as YouTube and Netflix offer a vast and diverse range of shows, movies, and user-generated content that is easily accessible. This has given rise to a new era of content consumption where viewers have more control over what, when, and how they watch.

Ugandan content creators are increasingly leveraging these platforms to monetize their work. Through ad revenue, platform partnerships, and direct fan support, creators are finding new ways to earn a living from their content. The telecommunications, multimedia, and post sectors remain some of the most vibrant in Uganda, supporting over 1,000,000 direct jobs and attracting more than UGX 3 trillion in new investment, while serving as a key enabler for businesses across different sectors. As outlined in national priorities, ICT is recognized as a foundational pillar and critical driver of Uganda's socio-economic transformation, alongside energy, transport, and human resources. Guided by the Digital Uganda Vision 2040, the sector continues to focus on harnessing digitization to boost innovation and productivity across all areas of the economy.

Telecommunication

Investing in telecom infrastructure expands network coverage to underserved areas, making digital access more affordable and reliable. This reduces the digital divide by enabling greater inclusion in education, health, and economic opportunities. It also promotes competition, innovation, and socio-economic growth.

Telecommunication at a Glance

Infrastructure

Towers
5,204

Geographic Network Coverage

Fiber
47,771KM

Service Access

Mobile Subscriptions
Registered 51M
Active 41.6M

Mobile Internet Subscriptions

15.7M

Fixed Line Subscriptions

196K

Fixed Internet Subscriptions

106K

Handheld Devices

Basic Phones
2.5M

Feature Phones
26.7M

Smart phones
18.3M

Social Media Subscriptions

WhatsApp
9.5M

TikTok
9.1M

YouTube
6.5M

Snapchat
2.0M

Instagram
1.5M

X
1.0M

Netflix
185K

Mobile Money

Registered Mobile Money Accounts
50.5M

Active 90 Day Accounts
32.1M

Active 30 Day Accounts
24.6M

Mobile Money Agents
915K

K Thousand **M** Million **KM** Kilometre

Active Subscriptions Subscriptions that are active for at least 90 days

Telecom Coverage and Access Infrastructure

Towers

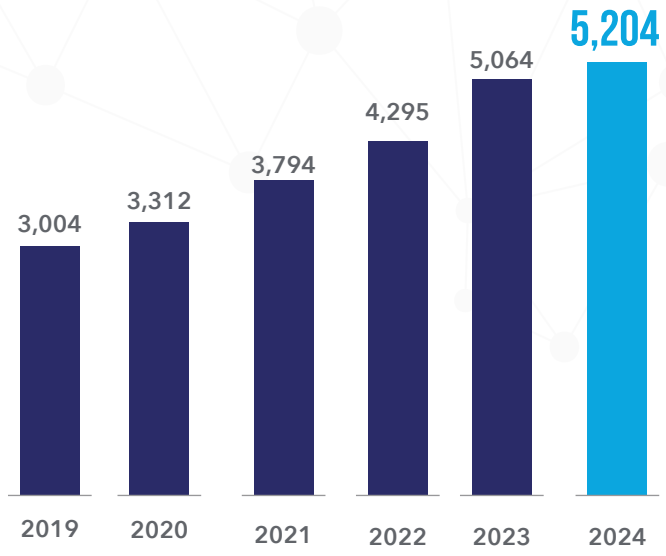
In 2024, Uganda's telecom network continued to grow in two main ways: extending coverage to rural and underserved areas, and increasing the number of towers in cities and high-demand regions to keep up with the rising need for faster data speeds and better quality calls.

Most of these towers largely operate a collocation model in which tower companies build and lease sites to multiple MNOs. This model promotes infrastructure sharing, reducing duplication of investment and often accelerating network rollout.

Towers are the backbone of mobile communication. They host the antennas and equipment that make it possible for consumers to make calls, send messages, and access the internet. As demand for faster internet grows, more towers are needed to reduce dropped calls, improve coverage, and deliver higher data speeds. Adding more towers – a process known as densification – also supports Uganda's broadband policy target of 8 Mbps, ensuring that users get more reliable and faster connections.

At the end of the year, the sector commanded 5,204 sites shared between TowerCo of Africa, American Tower Corporation (ATC) and Uganda Telecommunications Corporation Limited (UTCL). In terms of geographical distribution, at the close of 2024, approximately 40% of the national tower portfolio remained concentrated in the Central region, reflecting historical population and economic density trends.

Figure 1 Tower Growth Trends (2019-2024)

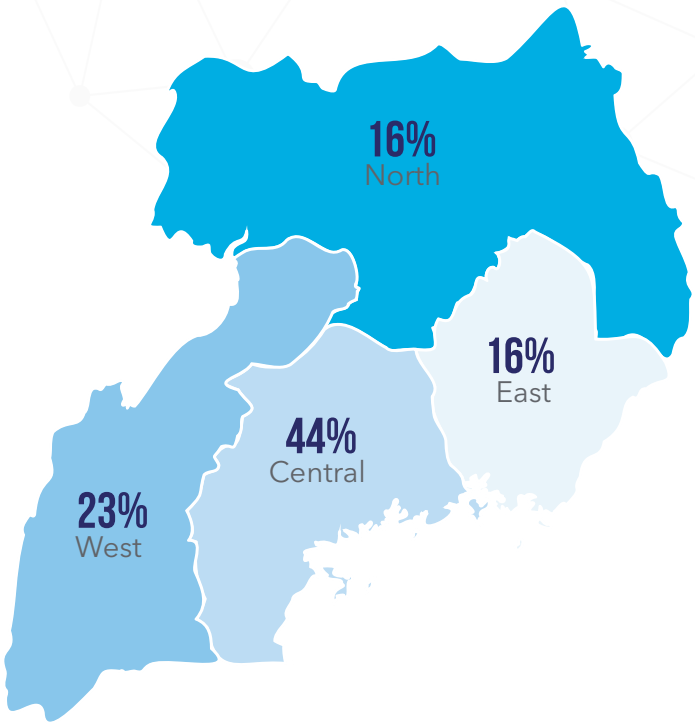


5,204

Total Towers as of December 2024

> **"Towers are the backbone of mobile communication. They host the antennas and equipment that make it possible for consumers to make calls, send messages, and access the internet."**

Figure 2 Regional Tower Distribution 2024



Government Tower Subsidies

In pursuit of universal access targets, the Government of Uganda (GOU) under the Uganda Communications Universal Service Access Fund (UCUSAF) programme, commissioned 63 sites to serve commercially unviable underserved regions. These are built in partnership with licensed infrastructure providers and represent a direct intervention to ensure no Ugandan is left behind in the digital transformation agenda.

Legacy Infrastructure

It is worth noting the challenge posed by legacy infrastructure. A growing number of sites, many commissioned at the entry of the earliest operators such as MTN and Celtel in the late 1990s, were due for decommissioning or required significant site hardening works to remain operational and meet modern service demands. This aspect of network management is crucial for maintaining overall network reliability, efficiency and environmental protection.

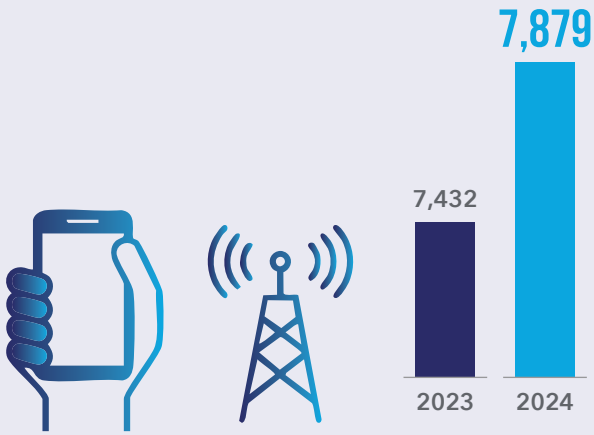
Base stations

In addition to towers and fiber, base stations are a vital part of Uganda's telecom network. They are the sites that connect your phone to the wider network, making it possible to make calls, send messages, and access the internet. Operators continued to expand this infrastructure in 2024, adding 400 new base stations across the country.

By the end of 2024, Uganda had 7,879 base stations – with 738 powering 5G for ultra-fast internet, 6,631 delivering 4G/LTE services, and 6,724 supporting 2G and 3G. From this expansion, more than half the country (58%) is now covered by 4G, while the rest (75% of land area) relies mainly on 2G and 3G.

Each new base station helps close Uganda's coverage gaps, especially in rural and hard-to-reach areas where reliable connectivity is still limited. By expanding this infrastructure, and complementing base stations with new services such as satellite solutions, networks are able to reduce dropped calls, improve data speeds, and bring mobile services to communities that previously had weak or no coverage.

Figure 3 Base Station Count (2023-2024)



Backhaul Fiber Networks

The future of telecom is fast, high-speed internet, with fiber at the heart of making this possible. Fiber networks provide the backbone needed to connect mobile towers to core networks and to the global internet. They are the digital highways of Uganda, making it possible to deliver modern services such as faster calls, reliable internet, and advanced online applications.

> **"Fiber networks provide the backbone needed to connect mobile towers to core networks and to the global internet."**

The Government of Uganda through the National Backbone Infrastructure (NBI), alongside a growing number of private sector licensees, continue to be the primary investors driving expansion in this vital infrastructure.

In 2024, the sector witnessed significant growth in fiber deployment. Collectively, an estimated 14,000 kilometers of new fiber were deployed across the country, bringing the total backhaul fiber footprint to **47,771** kilometers.

Figure 4 Annual Total Fiber Distance (KMs)

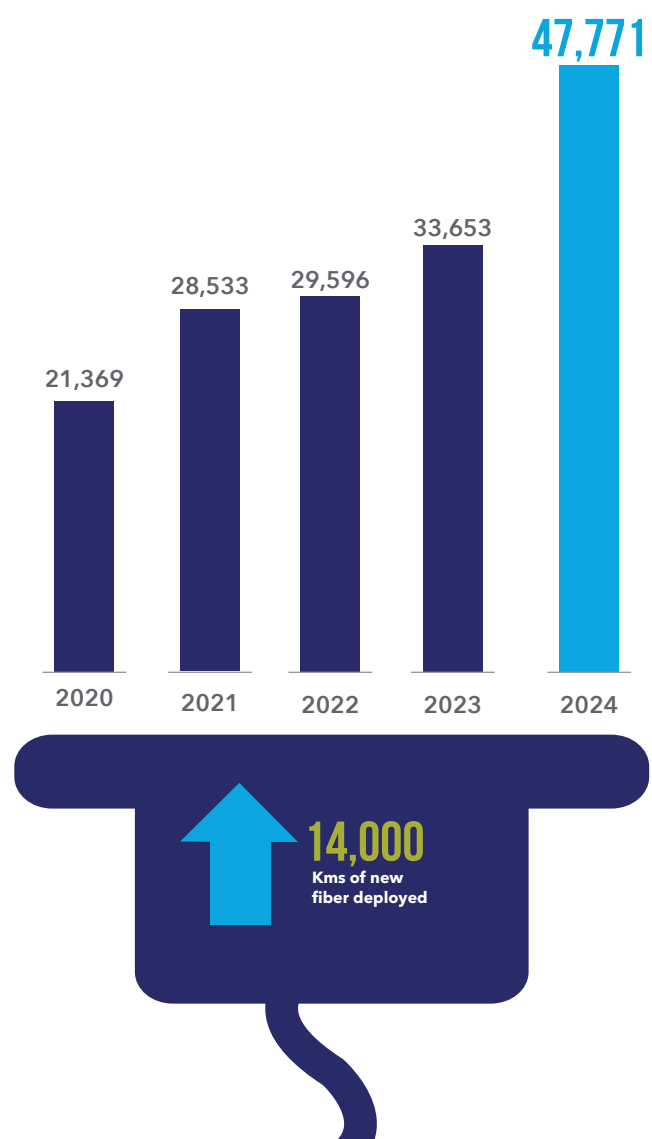
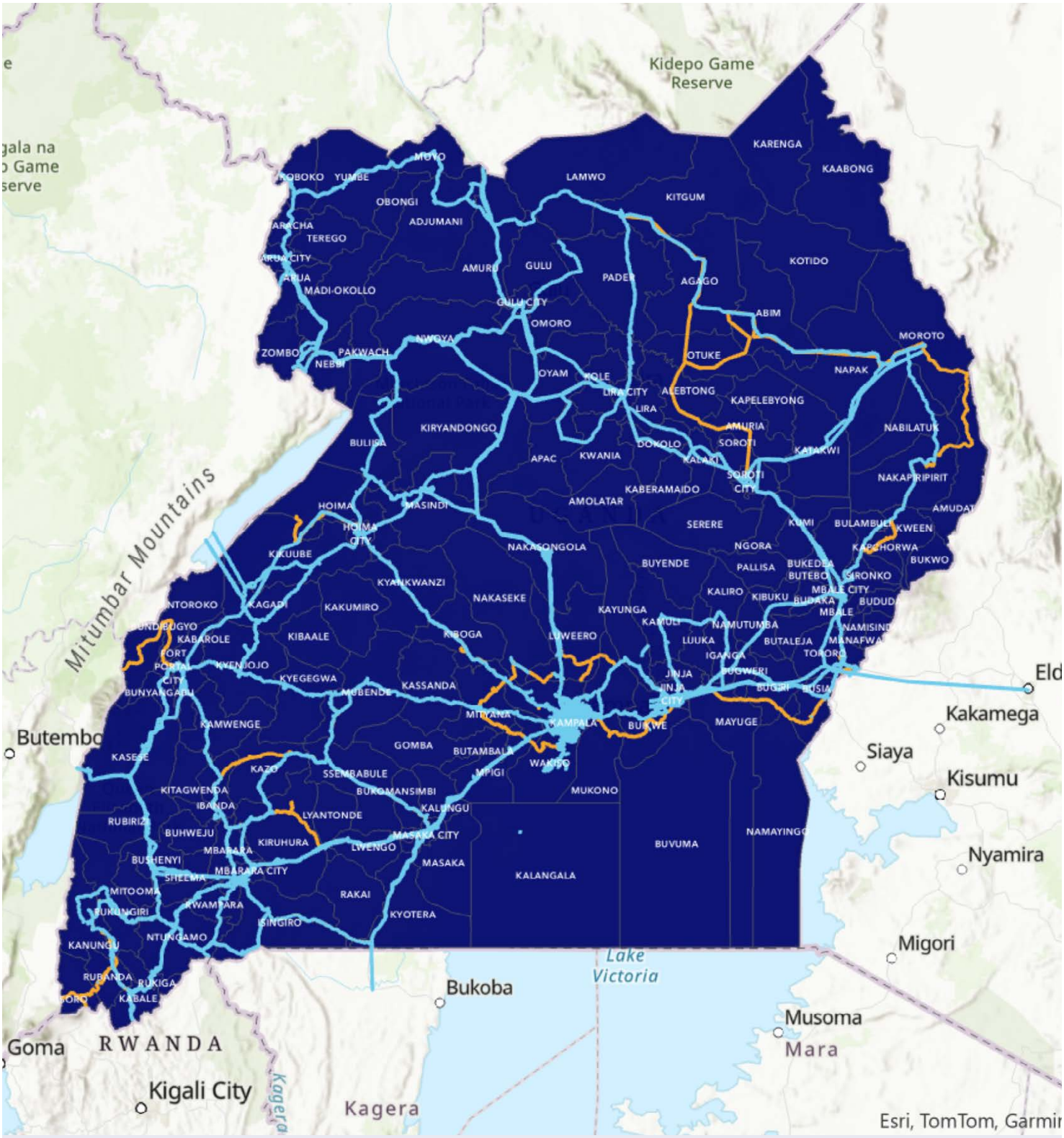


Figure 5 **Fiber Infrastructure Footprint 2024**



This expansion includes notable contributions from major operators, alongside the commencement of NITA-U's National Backbone Infrastructure Phase V, which is projected to add an additional 5,000 kilometers of fiber backhaul upon completion, particularly extending connectivity into underserved regions such as Moroto and the Karamoja sub-region. The other private actors include MTN, Airtel, Canal Plus, Savannah Fiber Ltd, Kampala Siti Cable, and Roke Telkom, among others.

More importantly, 2,985 telecommunication sites are connected to high-speed fiber.

Satellite

Uganda runs a technology-neutral regime. This refers to the principle that our regulations do not favour one specific technology over another. This principle is enshrined in our National Broadband Policy, 2018. This approach fosters innovation, competition and flexibility in deploying services while ensuring that consumers benefit from the diverse and efficient technological solutions. It will also not require a review of the regulatory framework with future changes in technologies.

The technologies currently available for the delivery of communication services include:

Cellular Technologies
(5G, 4G, 3G, 2G, CDMA) each delivering various services, including data and voice to the consumers.

Satellite-Based Technologies
LEO Satellite Internet under regulatory review (e.g Starlink, OneWeb, Amazon's Project Kuiper, AST SpaceMobile, Iridium, Telesat and Global Star, etc), GEO Satellites (Eutelsat, Viasat, SES, Intelsat, HughesNet, OneWeb, etc).

Fixed Broadband Technologies
Fibre Optic, Cable, Digital Subscriber Line (DSL), and fixed wireless access (FWA).

Wi-Fi Technologies/ Standards
(IEEE 802.11 series, etc).

"Uganda runs a technology-neutral regime. This refers to the principle that our regulations do not favour one specific technology over another."

Some of these technologies are substitutable – meaning that they can serve as alternatives to deliver the same or similar service or outcomes. For example:

High Speed Data services

Cellular technology 5G vs Fixed Broadband Fibre Optic.
These are interchangeable technologies. Operators can choose to use 5G Fixed Wireless access or Fibre Optic and achieve high-quality speeds of data.

Data service in underserved areas

Satellite vs Cellular vs Fiber Optic technologies.
These are substitutable. Satellite provides an alternative to cellular technologies, which requires a large number of cell towers, as well as an alternative to fibre optic that requires investment in significant kilometers of underground and aerial cables to deliver the services to the end user.

Wholesale Capacity

Satellite vs Fibre Optic technologies.
These can provide operators with backhaul connectivity options to their cell sites or base stations for the delivery of mobile data services to the end user. Operators can utilize fibre optic in urban areas that are easy to deploy and satellite in hard-to-reach areas.

Data Centers

2024 yet again saw the increased strategic importance of data centers in Uganda. These secure climate-controlled facilities housing assorted network equipment are indispensable in the delivery of high-performance digital experiences. They serve as foundational infrastructure for streaming services, mobile money platforms, cloud computing, online gaming, as well as digital government initiatives.

Beyond service delivery, data centers have established themselves as significant levers for cost control, providing economies of scale for IT infrastructure, as well as reduced transmission costs for international connectivity.

The key actors in the Uganda data center space remain:

Mobile Network Operators and Internet Service Providers (ISPs) that operate significant data centers to house their core network infrastructure such as Mobile Switching Centers (MSCs), billing systems and subscriber databases that are strategic assets for their businesses.

Commercial data center providers such as Raxio, who rent out rack space, cages and suites to businesses whilst also providing power, cooling, security and connectivity infrastructure.

Mobile Network Coverage

Mobile network coverage is the result of many components working together, including passive infrastructure (towers), satellites technologies, backhaul fiber networks and base stations. Even with all these elements in place, there can still be gaps in covering the whole country with mobile services – the *"Coverage"* gap – people who do not have a mobile signal. Tracking this coverage helps us to identify and quantify these gaps.

By addressing coverage gaps, we can then tackle the *"usage gap"*–the difference between people who have coverage and those who actually use it. This ensures that essential services such as agriculture, education, and healthcare can be accessed by more people.

Table 1 **Geographical area serviced by different networks**

Technology	Geographic Coverage	Population Coverage
2G	75%	98%
3G	72%	98%
4G	58%	82%
5G	1%	15%

As Table 1 illustrates, while 2G and 3G networks are dominant, serving 98% of the population within their respective coverage areas, 4G coverage extends to 58% of the geographical area and serves 82% of the population. The 5G footprint, though nascent at 1% geographical coverage, already reaches 15% of the population, indicating strategic deployment in densely populated areas.

It is important to note that these population coverage figures often overlap because networks operate intermittently and signal strength can vary depending on location, terrain, and network load, influencing the actual user experience regardless of the nominal coverage area.

The 98% total population coverage represents an aggregated position achieved by combining the coverage areas of all mobile network operators. This is not the coverage of a single operator. The full realisation of this 98% total coverage, meaning the ability for any customer to actually access a network at these locations, can only happen when national roaming is enforced.

The Commission prioritizes mobile network coverage tracking not just for "faster speed" but strategically to ensure the network evolves in line with national broadband policy and evolving market demands.

In faster, high-capacity networks, technologies like 4G towers and fiber complement each other. Fiber networks, while offering immense bandwidth, are not feasible to deploy everywhere. This is where 4G towers become crucial; they can be added to existing fiber infrastructure to relay the service via a wireless signal, extending high-speed connectivity to areas that are difficult or cost-prohibitive to reach with physical fiber lines. This combined approach ensures broader and more efficient coverage.

> **"The 98% total population coverage figure represents an aggregated position achieved by combining the coverage areas of all mobile network operators. This is not the coverage of a single operator. The full realisation of this 98% total coverage, meaning the ability for any customer to actually access a network at these locations, can only happen when national roaming is enforced."**

98%

Figure 6 A Map Showing the Consolidated Mobile Network Coverage as of December 2024

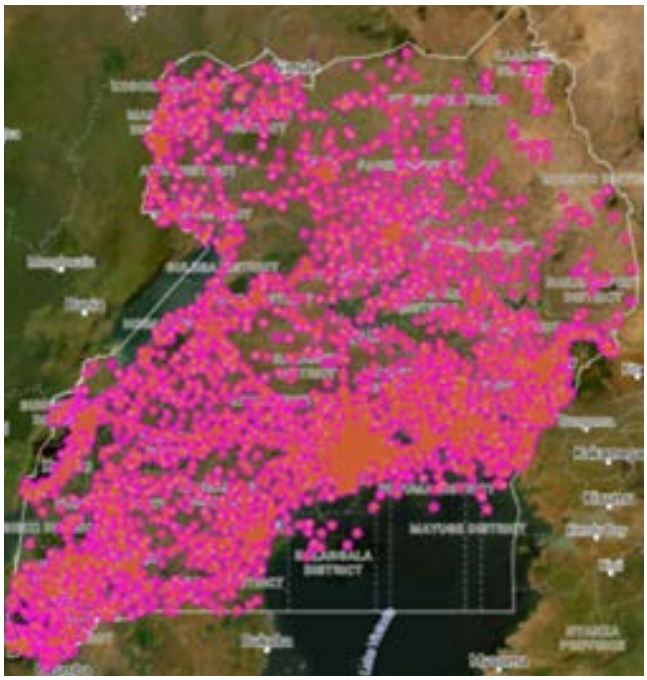


Figure 7 A Map Showing 2G Mobile Network Coverage as of December 2024

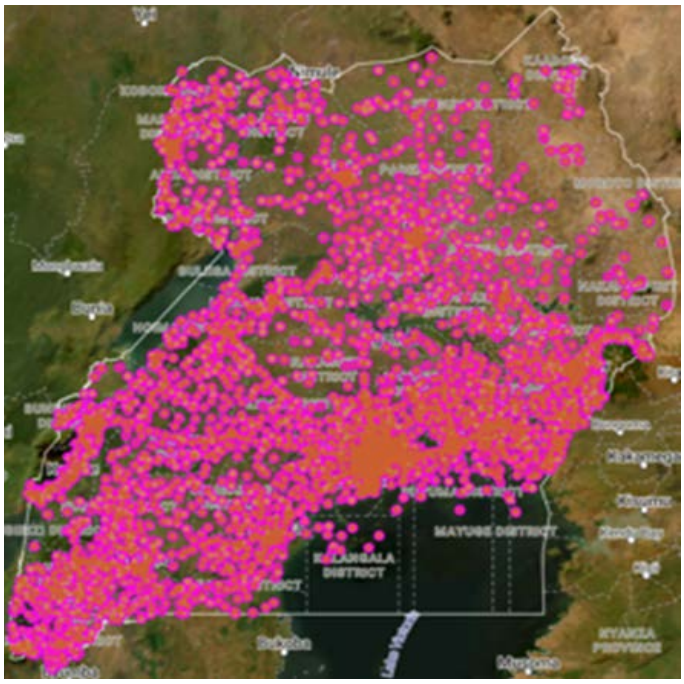


Figure 8 A Map Showing 3G Mobile Network Coverage as of December 2024

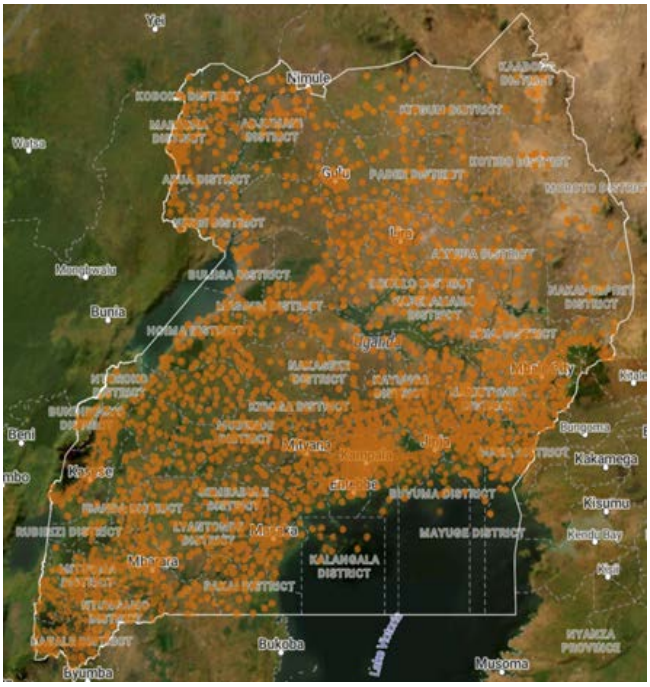
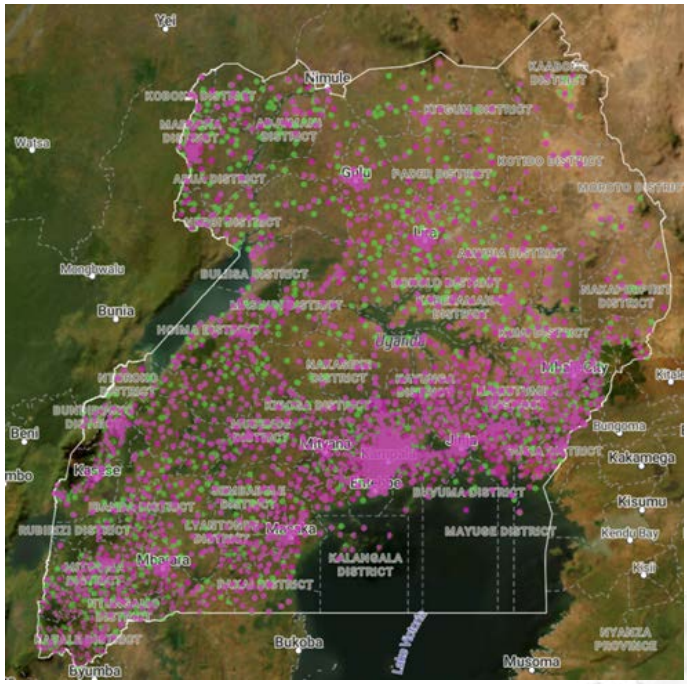


Figure 9 A Map Showing 4G Mobile Network Coverage as of December 2024



Telecommunications Service Access

Mobile Active Subscriptions

Subscription and Penetration Trends

Mobile subscriptions represent the traditional core of the retail portfolio of any mobile marketplace and include active Subscriber Identity Module (SIM) Card registrations, signifying the most fundamental level of mobile connectivity.

At the end of 2024, the total mobile subscriptions base stood at **41.6 million** 90-day active SIMs. This represents 12% growth between December 2023 and December 2024.

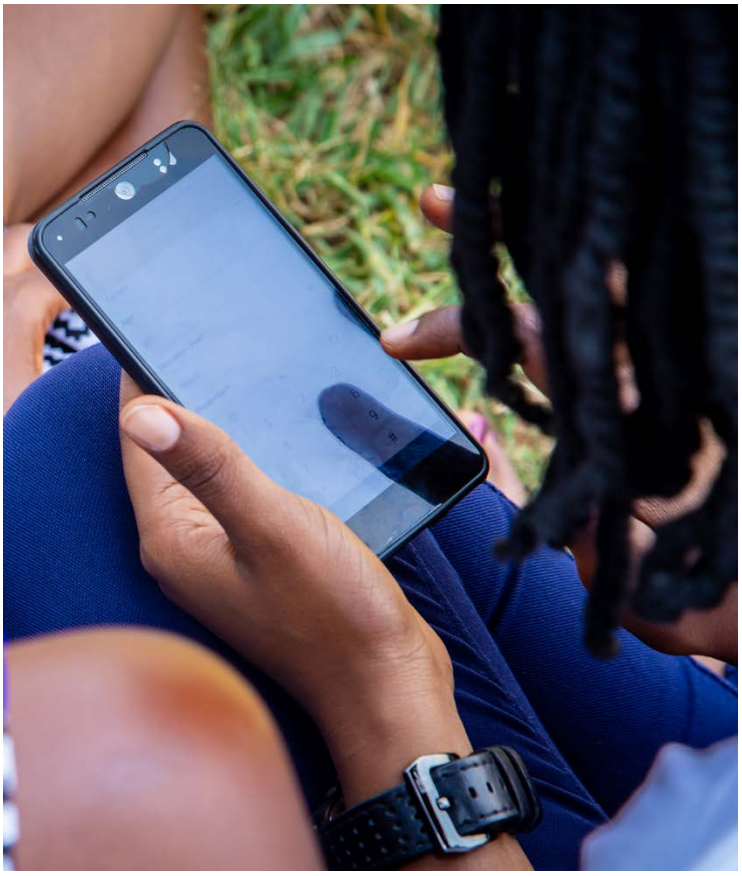
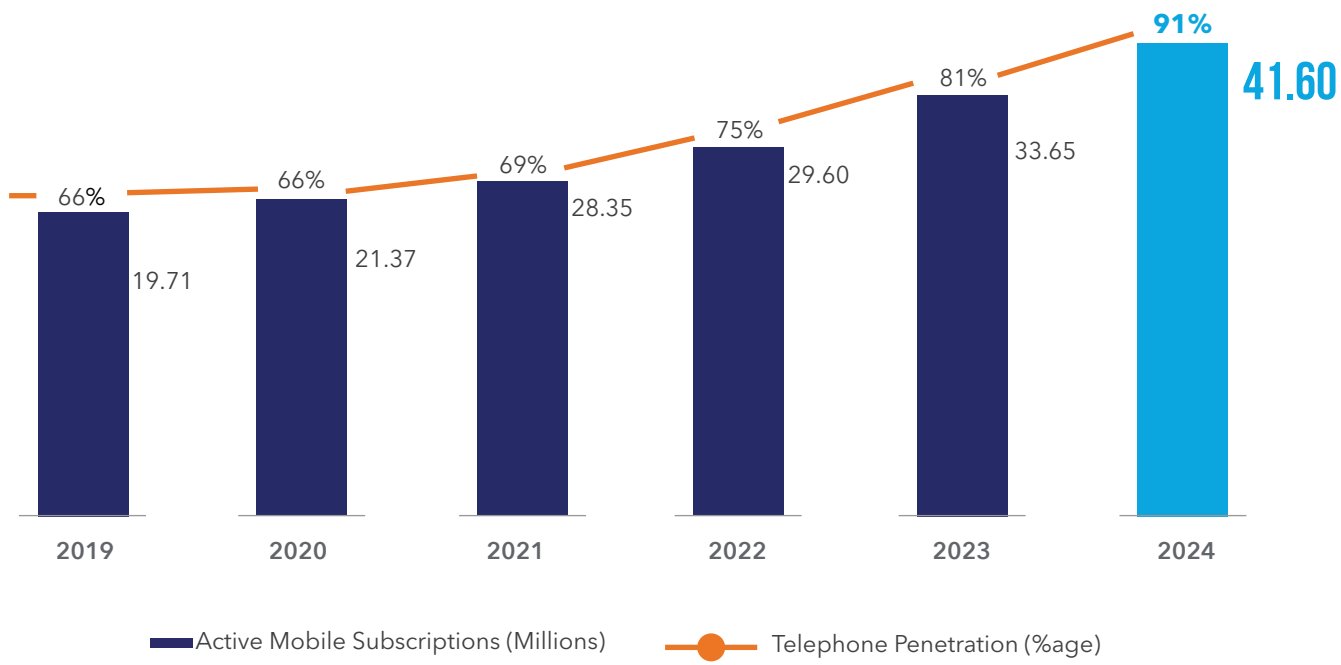


Figure 10 Active Mobile Subscriptions Growth Trends (2019-2024)



Segment Growth drivers

The new growth is driven by new demand for data subscriptions, which is estimated to have grown by 22%, positioning the data segment as a key growth driver in the mobile communications space.

Active Mobile Subscriptions by Service 2022 – 2024

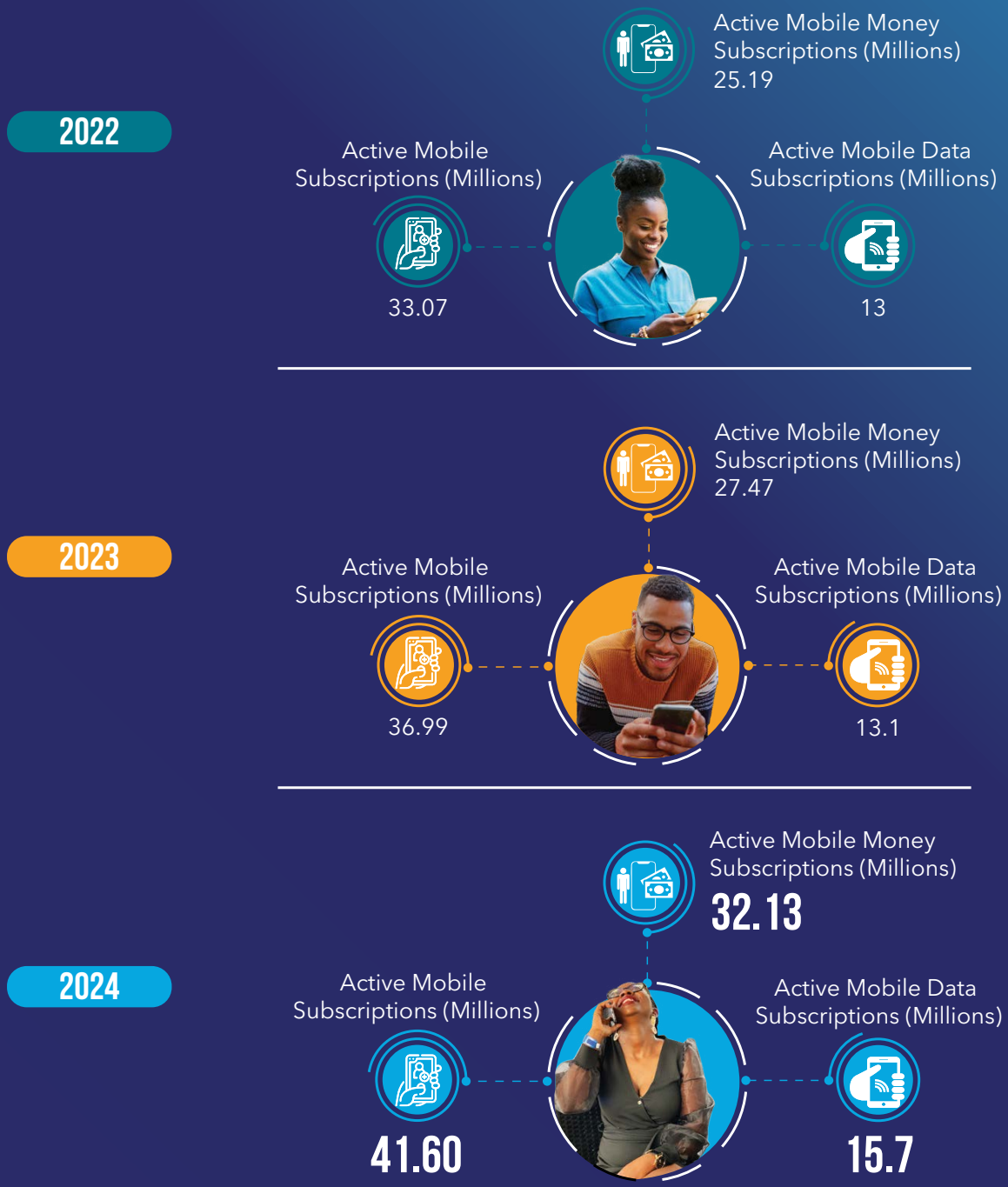
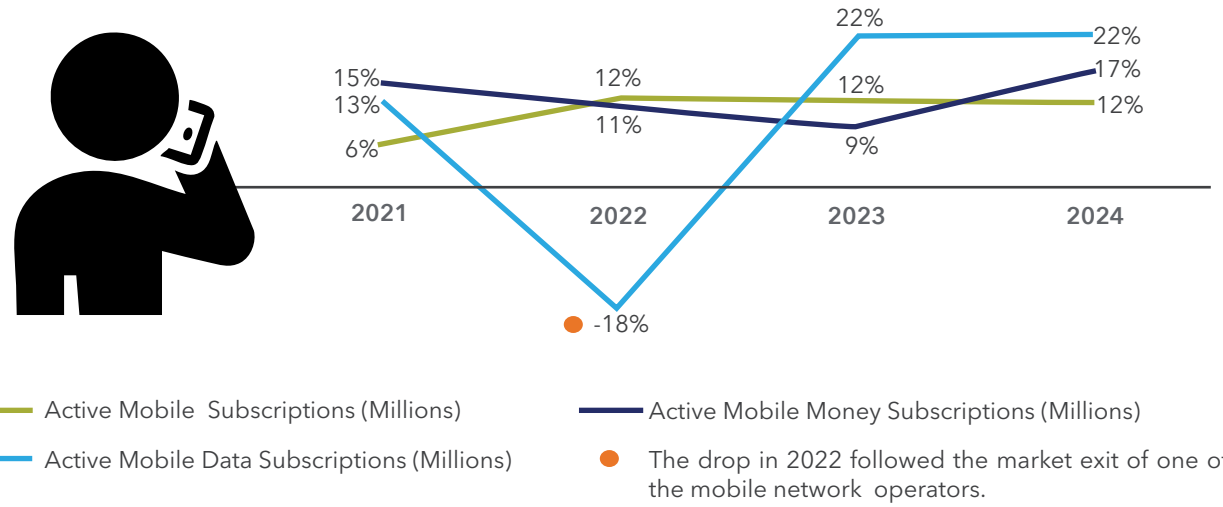


Figure 11 Growth Trends of Active Mobile Subscriptions by Service (2020 – 2024)



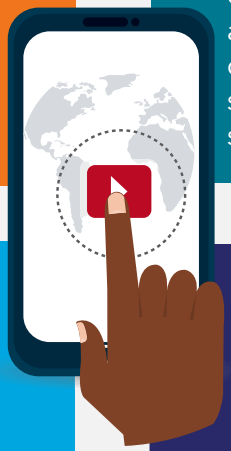
This new demand in data and mobile subscriptions highlighted in figure 10 above is premised on:

01

Continued falling prices of entry level smartphones (these now average less than UGX 200,000) hence opening up a new first-time user market.

02

The appeal of Social Media Over-The-Top (OTTs) Applications such as WhatsApp and TikTok is also another strong adoption driver amongst new audiences. Short-form video content remains a particularly strong catalyst for new subscriptions.



03

Innovative pricing models for data services, specifically for the introduction of micro segmented offerings.

04

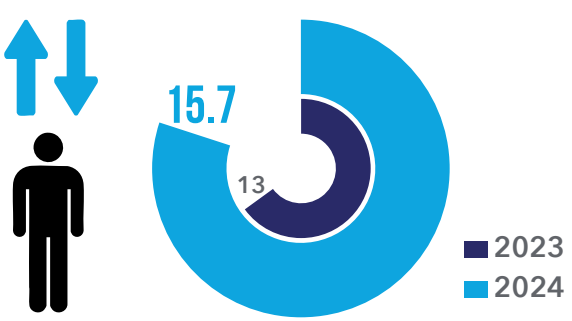
New demand for peripheral users is also attributed to the need to connect to the mobile payments and digital economy services.

Mobile Data Subscriptions

The sector witnessed significant growth from 2023 to 2024, with active mobile internet subscriptions emerging as the single largest performing metric. The number of active mobile internet subscriptions grew from 13 million in 2023 to **15.7 million** in 2024.

This growth in active mobile internet subscriptions is strongly correlated with the increasing penetration of smartphones in the Ugandan market that grew by 22%. As more affordable and capable smartphones become available, they empower more citizens to access the internet, thereby fueling data consumption and driving up subscription numbers.

Figure 12 Active Mobile Data Subscriptions (Millions)



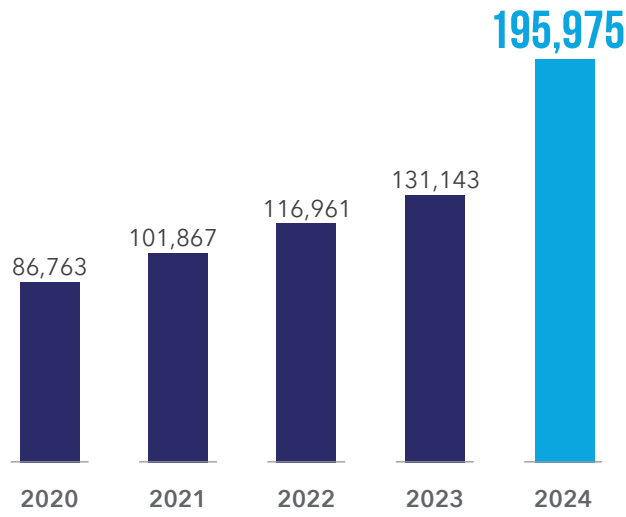
It is important to note, however, that with effect from 2024, the criteria for classifying an active mobile internet user has been revised. Previously, any user consuming more than 5MB of data per month was considered active. In 2024, this threshold has been raised to 30MB to better reflect meaningful internet usage patterns in today's digital environment.

As a result of this definitional change, the current reported figures are lower compared to previous years. This should not be interpreted as a decline in usage, but rather as a refinement in the measurement standard to align with evolving consumption trends and international benchmarks. The apparent drop is thus primarily due to the stricter threshold, not a real decline in internet adoption.

Fixed Line Subscriptions

While Uganda's telecommunications landscape is predominantly mobile-driven, the fixed-line subscriber base has grown over the past five years. By 2024, fixed-line subscriptions had grown to **195,975**, representing a 49% year-on-year growth.

Figure 13 Fixed Line Growth Trends (2020-2024)

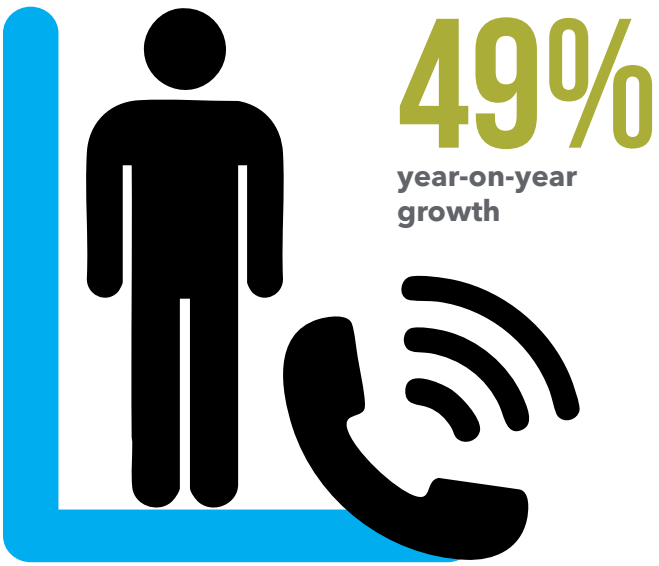


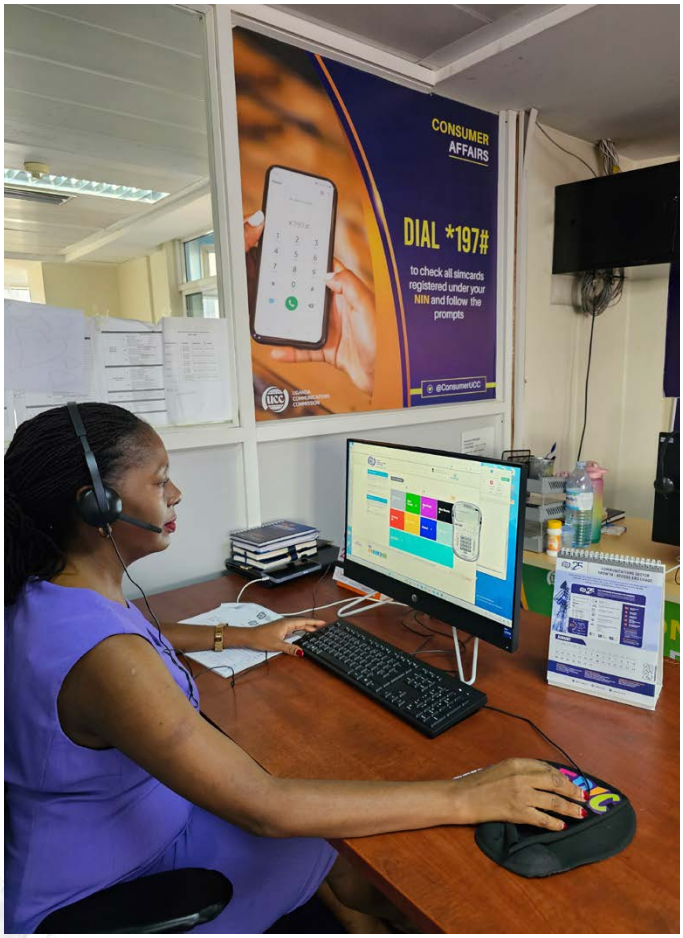
This sustained growth marks a significant shift in Uganda's ICT infrastructure dynamics, driven by several key factors:

01 Enterprise and institutional demand: The primary driver of fixed-line growth has been increased demand from businesses, government institutions, and large organizations that require stable, high-capacity voice and data services. These sectors rely on fixed connections for secure communications, call centers, and high-quality broadband access.

02 Migration to unified communications: The rise of cloud-based telephony and integrated enterprise communication systems has led organizations to revisit fixed-line services as part of hybrid ICT strategies.

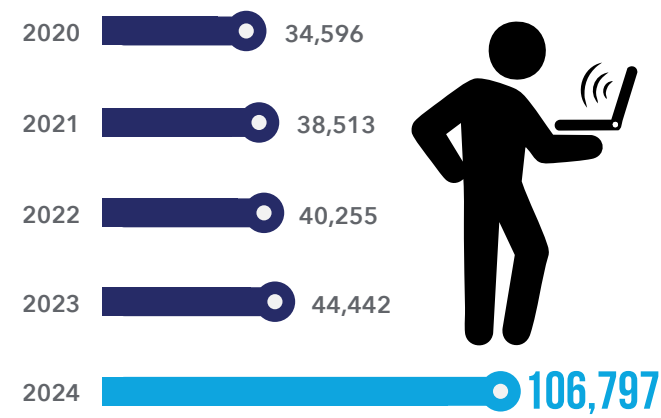
> **By 2024, fixed-line subscriptions had grown to 195,975, representing a 49% year-on-year growth.**





Fixed Internet Subscriptions

Figure 14 Fixed Internet Growth Trends (2020-2024)



The fixed internet segment mirrored the growth observed in mobile internet, with fixed internet connections more than doubling in 2024.

This expansion was significantly driven by new investments in "last-mile" networks from various Television (TV) and data service providers. These included players like MTN's Wakanet, FaibaNet, Kampala Siti Cable, Zuku, and Canal Plus. These investments led to **106,797** fixed-line connections specifically for data, primarily through Fiber-to-the-Home (FTTH) subscriptions.

A key factor in this growth was a downward shift in fiber pricing by new market entrants in the third quarter of 2024 that spurred a significant increase in demand. This compelled existing players to reduce their prices.

The rise in both user penetration and average data consumption, which now stands at 80 GB per month per fixed connection, is directly linked to the growing popularity of household bandwidth-intensive applications. These include video streaming services, online gaming, and advanced collaborative tools (like Customer Relationship Management - CRM and Enterprise Resource

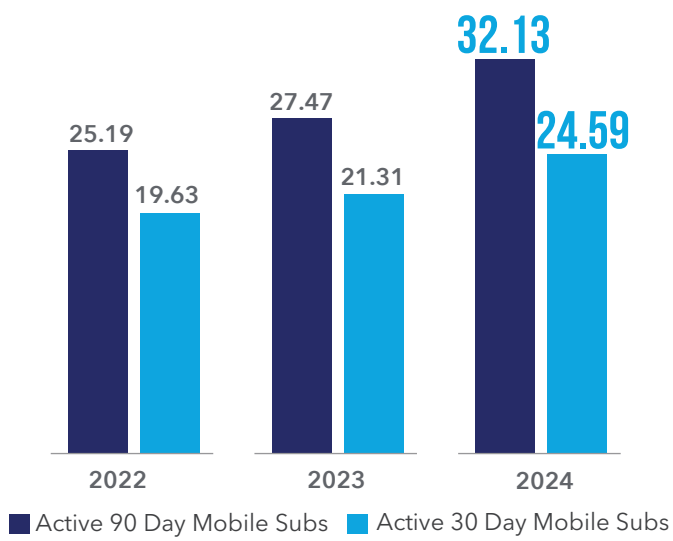
Planning - ERP) increasingly used by emerging Small and Medium-sized Enterprises (SMEs).

It's important to note that the growth in fixed internet isn't replacing mobile internet; rather, the two are complementary. Users typically rely on mobile data for on-the-go connectivity but switch to a fixed internet solution at home or work for tasks that require heavy data usage, such as streaming movies or video calls.

Mobile Money Active Subscriptions

The mobile device remains a fundamental pillar of financial service access and usage within Uganda. Mobile money services have demonstrated expansion in both reliability and reach across the country, evolving into a platform for a broad array of daily financial activities, including household management, school fees payments, e-commerce transactions, and fuel expenses, among others.

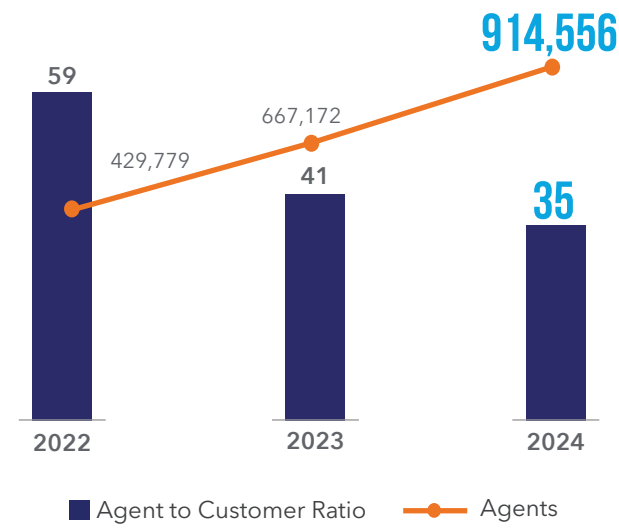
Figure 15 Mobile Finance Subscriptions and Agent Counts in Millions (2022-2024)



Mobile money is rapidly becoming a fundamental, day-to-day service, as shown by growth in subscriber activity. The number of active 90-day mobile financial service subscribers grew by 17%, from 27.47 million in 2023 to **32.13** million in 2024.

Even more indicative of its daily integration, a substantial portion of these accounts are frequently used. Out of the 32.13 million active accounts in 2024, 78% transacted at least once every month. This consistent engagement directly contributed to a 15% increase in active 30-day subscribers, rising from 21.31 million in 2023 to **24.59** million in 2024.

Figure 16 Mobile Agent Count and Agent Customer Ratios (2022 - 2024)



Mobile Money Agents

Alongside the growth in mobile money subscriptions, Uganda's mobile money agent network expanded. The number of agents rose by 37%, from 667,172 in 2023 to **914,556** in 2024. This growth reflects the industry's proactive response to rising demand, especially in remote and underserved areas where setting up traditional banking infrastructure is often costly and impractical.

To improve access, MNOs and traditional banks have formed strategic partnerships, allowing mobile money agents to also serve as banking agents. As a result, service accessibility has improved: the number of active 90-day subscriptions handled by each agent dropped from about 41 in 2023 to 35 in 2024, indicating better service distribution and greater efficiency for users.

Handheld Devices

As outlined in the earlier sections, the mobile growth discussed previously is partly driven by shifts in the device marketplace. This segment of the value chain remains heavily dominated by entry-level and mid-range Android smartphones, typically priced between $40 and $120.

Brands of note in 2024 included:

Samsung
While globally known for premium devices, in Uganda it is more largely known for its entry level and mid-range Galaxy A-series models (A16–A56), which bring premium features such as 6.7 Super AMOLED screens (90–120 Hz). Other features are: AI powered 50 MP cameras with OIS, 5,000 mAh batteries, fast charging (25–45 W), IP54–IP67 water/dust resistance, and up to six years of OS/security updates. This accounts for an estimated 3% of mobile vendor market share.

Tecno
The brand maintained a strong position with its specialized, feature-rich, and affordable smartphones. It is especially known for the Camon series, which offers AI-optimized cameras for darker skin tones, large batteries (5,000–6,000 mAh), AMOLED screens, fast charging, localized HiOS software, dual SIM capability, and mobile money support. It holds 29% of Uganda's market share.

SAMSUNG TECNO Infinix itel Apple

Infinix
Known for its stylish and budget-friendly smartphones, features AMOLED/120 Hz displays, ultra-fast charging (up to 260 W), gaming-focused processors, and a user-friendly XOS interface, along with strong local support, capturing 3% of the market.

Itel
Focused on ultra-affordable smartphones and feature phones offering FM radio, dual SIM, expandable storage, long lasting batteries, and some entry level 5G models commanding 44% of the market.

Apple
Positioned in the premium smartphone segment propped by imports of both new and refurbished devices, commands value for their iOS ecosystem, robust security, and strong brand prestige. Apple has 1% of the market.

Ensuring Quality to Enable Access: Communications Equipment Testing System that Validates New Devices for Market Entry.

By verifying that all devices meet national and international standards, UCC directly addresses the ICT usage gap by guaranteeing that citizens have access to safe, reliable, and interoperable equipment, thereby boosting consumer confidence and enabling seamless connectivity across Uganda.

In 2024, feature phones continued to dominate the Ugandan telecommunications market, primarily due to their affordability and the provision of more cost-effective internet access. While smartphones, offering enhanced internet capabilities, demonstrated the most significant growth in subscriptions, their higher price point meant they still held a smaller market (39%) share than feature phones (56%). Basic phones, on the other hand, held the smallest share of the market (5%).

Feature phones reached 26.7 million, an increase from 25 million at the close of 2023. Smartphones demonstrated the most significant growth, with subscriptions rising to 18.3 million, up from 15 million over the same period.

> **In 2024, feature phones continued to dominate the Ugandan telecommunications market, primarily due to their affordability and the provision of more cost-effective internet access.**

While feature phones currently dominate, the adoption of smartphones is crucial for accelerating the digital economy. The economic benefits, including access to advanced digital services, e-commerce, and productivity tools, are substantially greater than those derived from feature phones.

The substantial growth observed in the smartphone count provides strong evidence of a much greater untapped potential for expansion within the Ugandan ICT sector. This transition is currently hampered by the high cost of smartphones. To fully realize the benefits of the digital economy, efforts must be focused on reducing the cost of smartphones to enable the broad transition from feature phones.

Basic phones also experienced a slight increase in subscriptions, reaching 2.5 million by the end of 2024, up from 2.1 million in 2023. This growth can be attributed to their continued convenience, particularly at mobile money agent stations and in energy-deficient remote areas across Uganda. Their extended battery life makes them especially valuable for facilitating daily transactions in these hard-to-reach and underserved communities.

According to GSMA, a feature phone is defined as a mobile phone with basic communication features, distinct from smartphones in that it typically uses closed platforms that do not support native third-party application development.

Figure 17 Consumer Handheld Devices Count in Millions (2020 - 2024)

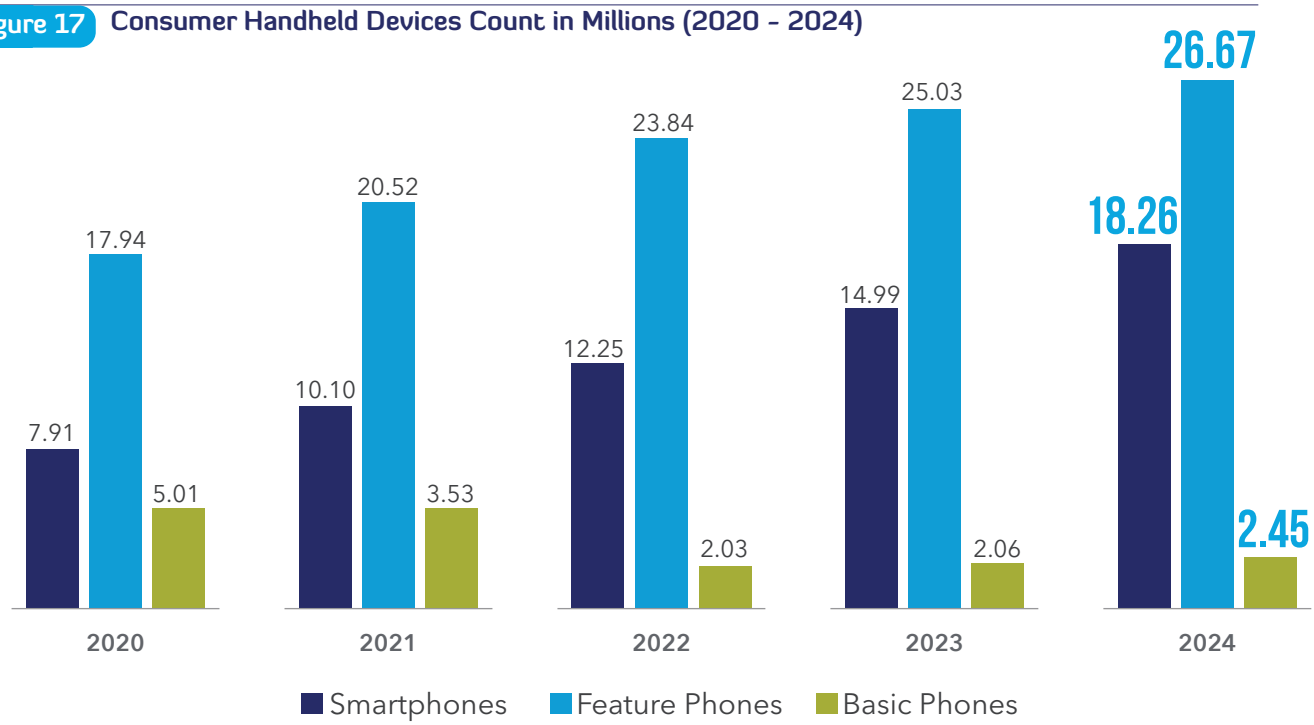
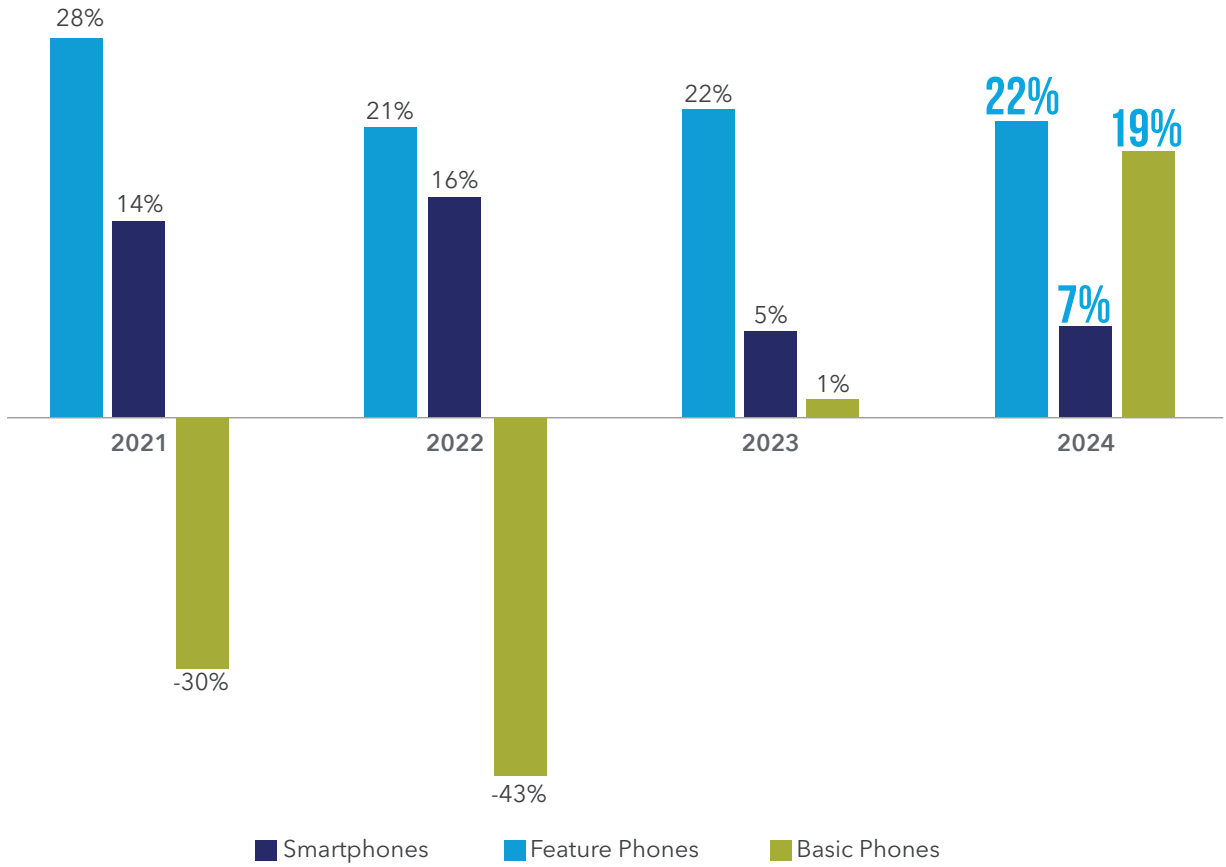


Figure 18 Trend of Consumer Handheld Devices Count in Millions (2020 - 2024)



Consumer OTT Applications

2024 saw these platforms yet again solidify their dominance in Uganda, becoming primary interfaces for digital life while dictating how and why consumers utilize network capacity.

Our OTT landscape is characterized by explosive, mobile-first adoption driven by an increase in smartphone penetration and a digitally native youth demographic. Platforms like WhatsApp, Facebook (the Meta ecosystem), X (formerly Twitter) and TikTok exhibit near universal penetration among smartphone users in Uganda.

OTT Products

Messaging
WhatsApp in particular has transcended from simple messaging to function as the de facto platform for commerce, community organization and informal information dissemination. Presently, almost every neighborhood, saving club, football fans club, family, or Old Boys club has a functional WhatsApp group.

In terms of unique users, WhatsApp accounted for almost 9.5million unique accounts active at least once every 30 days. This is a 2.1 million increase in the number of users from 2023.

Unpaid Video
YouTube and TikTok on the other hand remain the undisputed kings of video, serving both news, entertainment and research functions.

Collectively, YouTube and TikTok accounted for 15.5 million active accounts in Uganda at the end of 2024. This represents 5.4 million new accounts between December 2023 and December 2024.

Video-on-Demand
Separately, Netflix continues to gain traction in the high-income segments as a go-to paid video on demand service. This traction is based off falling retail bandwidth pricing as well as the penetration of fiber-to-the-home (FTTH) in many Kampala neighborhoods.

Netflix alone accounted for an estimated 200,000 accounts in Uganda.

Music-Streaming
Platforms like Spotify, Boom play and Apple Music have started converting traditional music consumption into digital streaming-based experiences. This is especially welcome as a new monetization pathway for local creatives.

Over the Top Radio Applications
The year has also seen continued strategic repivoting of the terrestrial FM stations towards OTT applications. Driven by deepening adoption of smartphones, a couple of radio stations and media houses are actively embracing OTT applications as crucial touch points, extending their listenership and audiences beyond traditional TV and radio.

This adaptation allows them to offer livestreaming, On-Demand content and interactive content such as chats and bots, as well as targeted advertising. This nascent practice should reposition traditional media in the emerging convergent media eco system.

Local media houses with a growing digital platform presence in Uganda include:

01 NRG Radio 106.5 – an urban youth-focused digital-first audio visual radio.

02 Galaxy Radio – an established Kampala based station expanding into digital platforms.

03 Capital FM - Kampala's leading English language urban radio with national terrestrial coverage.

04 Afro Mobile- Next Media's OTT internet television and radio platform launched in 2021.

05 Next Radio - an audio visual radio brand under Next Media, designed for youth.

Driven by deepening adoption of smart phones, a couple of radio stations and media houses are actively embracing OTT applications as crucial touch points, extending their listenership and audiences beyond traditional TV and radio.

Micro Blogging

The practice of broadcasting succinct messages to a broad audience has become an indispensable layer of Uganda's digital, political, entertainment and social fabric. Even amidst this global rebranding and policy shift, X has retained a significant role in Uganda's public square, providing breaking news, political commentary and social advocacy. Its hash tag-driven conversations continue to crisscross all spheres of social and governance conversations.

E-Commerce

The growing prevalence of e-commerce marketplaces such as Jumia, Shein, as well as digital payment interfaces, e.g. Banking and Merchant payment Apps, is worth noting. They have increasingly integrated into daily life, leveraging the ubiquity of mobile money as a unique Uganda payments accelerator.

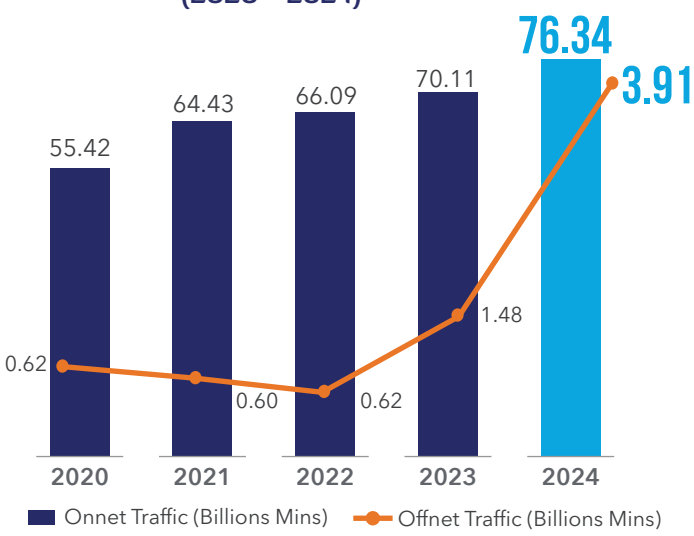
Telecom Usage

Domestic Voice Service Consumption Patterns

Mobile voice traffic remains a foundational pillar of connectivity in Uganda with significant recalibration.

In 2024, telecom operators in Uganda recorded a total of 80.2 billion domestic voice minutes, representing a 12% increase compared to 2023. Of this total, 95% was on-net traffic (calls made within the same network), while the remaining 5% accounted for cross-network voice traffic.

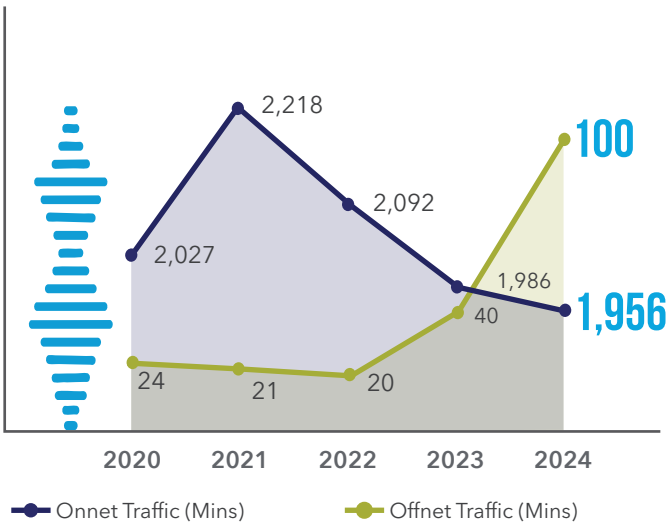
Figure 19 Domestic Voice Traffic Trends (2020 - 2024)



The overall resilience of this product line is largely attributed to habit and cultural preferences to call rather than text, as well as continuing price reinvention by the leading telcos for this product segment.

In Uganda, people still strongly prefer voice calls for communication, unlike in other markets such as Europe, The Americas and East Asia where texting is more common for short or casual conversations. This cultural preference influences how telecom companies design their business models, as they need to support the high volume of voice calls.

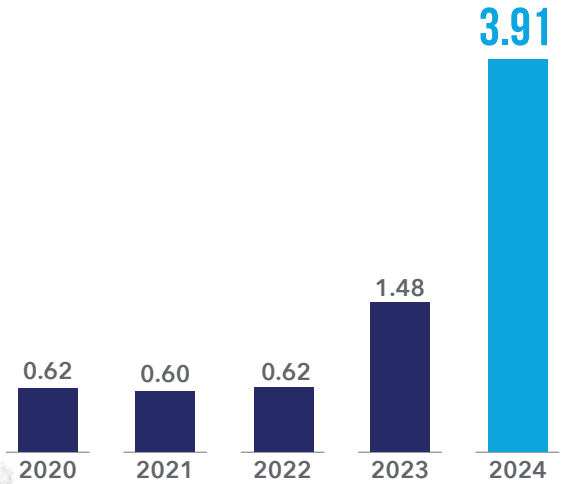
Figure 20 Annual Voice Traffic Trends per Subscriber (2020 - 2024)



Domestic intra-network and inter-network traffic split

The biggest growth in year-to-year percentage terms is attributed to the cross network (off-net) traffic segment in which traffic grew more than two-fold. The off-net traffic grew to 3.9 billion minutes from the previous annual voice traffic of 1.5 billion minutes.

Figure 21 Offnet Voice Traffic Trends in Billion Minutes (2020 - 2024)

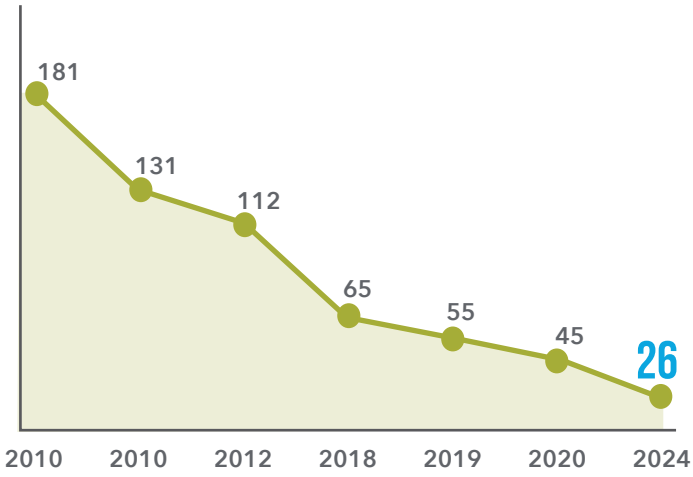


This growth is largely attributed to the continuing mainstreaming of "all-net", non-expiring bundles that allow for indiscriminate calling/pricing within and across networks by the two leading telcos, namely MTN "Freedom" and Airtel's "Chillax.

This pricing pivot by the telcos is largely on the back of a revision of the cross-network settlement rates for the completion of calls originating from outside of the network, also known as the Mobile Termination Rate (MTR). This was revised from UGX 45 to UGX 26 per minute in 2024.

> **"Cross-network settlement rates for the completion of calls originating from outside of the network, also known as the Mobile Termination Rate (MTR) ... was revised from UGX 45 to UGX 26 per minute in 2024. This created a three-fold jump in cross-network voice traffic."**

Figure 22 Mobile Termination Rate Trends in Uganda Shillings (2010 - 2024)



In addition to lower retail prices following the drop in MTRs (mobile termination rates), the decline also means people are less likely to use multiple SIM cards. At the same time, operators are shifting focus toward making more money from data services to make up for the loss in call-related revenue.

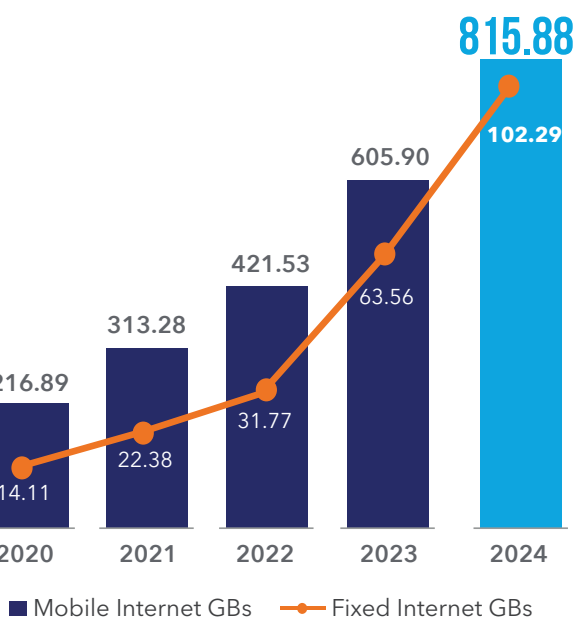
Data Traffic - From Pipes to Digital Platforms

Mobile Internet Traffic

The sector is quickly moving towards a more connected and unified system, where voice calls are becoming just one part of a wider range of communication options. The battle for the consumer's wallet is shifting from core voice to robust data and from mere connectivity to high value digital services that include digital advertising and localized content.

This convergence is highlighted by a 35% annual growth in total bandwidth consumed during the year on mobile platforms. Conversely, fixed terminals also saw a 61% growth in year-on-year bandwidth consumed.

Figure 23 Internet Traffic Trends in Million GBs



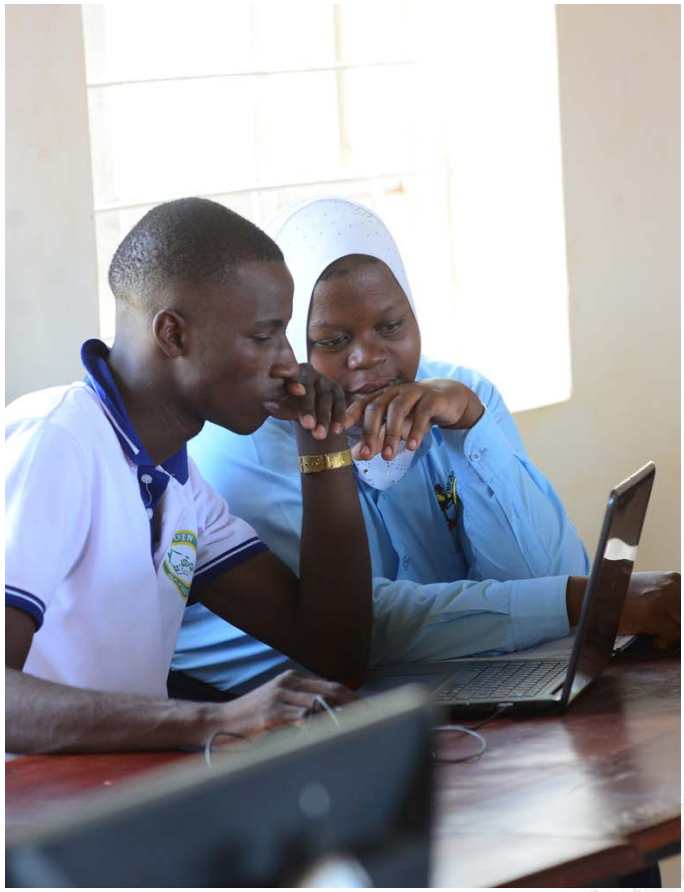
The shift in data consumption reveals a sector that is gradually reshaping its value proposition to adapt to consumer demands as well as capture new growth opportunities in the growing digital economy.

Fixed Internet Traffic

The market is seeing a gradual but clear shift towards consumer demand for fixed internet. This isn't just about needing more data; it's a fundamental change in how and where people are consuming it. We're seeing this driven by the rise of high data-consuming applications, many of which emerge from mobile phone usage.

This trend is evident in current consumption patterns: the average fixed internet connection now consumes 80 GB per month, compared to the 4.2 GB per month consumed by the average active mobile connection.

To meet the growing demand for reliable, high-capacity internet, operators are expanding their fixed internet services into new areas. They are now focusing on residential zones in Kampala and Wakiso's central business districts, moving beyond the traditional use of internet in offices and on mobile devices.

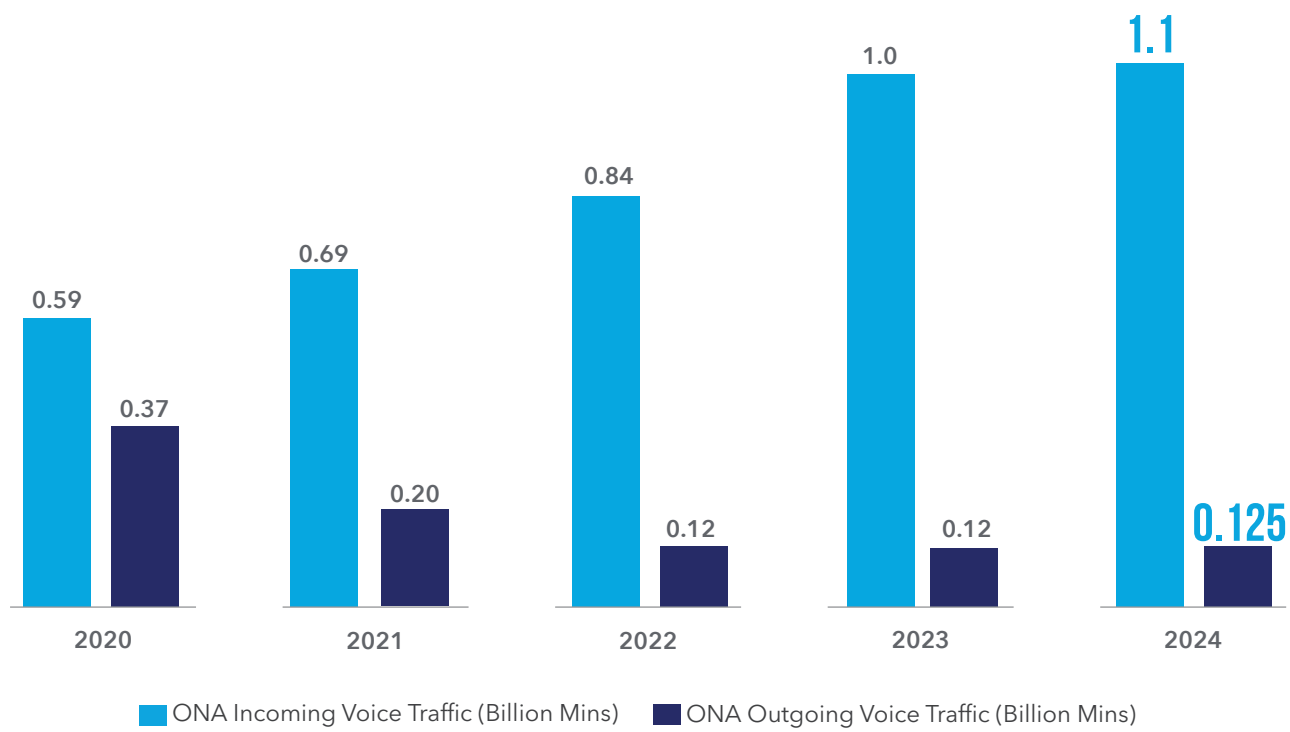


One Network Area (ONA) Voice Traffic

The One Network Area (ONA) initiative launched in 2014 has been a key driver of regional telecommunications policy since its inception. ONA voice traffic, which specifically includes calls made to and from the East African Northern Corridor Partner States of Kenya, Rwanda, South Sudan, and Tanzania, has experienced substantial growth over the years, a trend largely informed by dynamic business movements across the region.

Inbound calls from member states posted a 2% year-on-year growth, rising to 1.1 billion minutes of talk, while outbound calls from Uganda to the member states held steady at 125 million minutes.

Figure 24 ONA Voice Traffic Trends



The One Network Area (ONA) initiative has been effective in facilitating voice communication, but its framework, which set fixed rates for voice and data in 2014, has fallen behind the curve of technological advancements. The initial focus was on voice services, yet the current telecommunications market is defined by a significant mix of both mobile voice and data usage.

As smartphone uptake in the region continues to grow, the demand for affordable and reliable data services is vital. The industry must move beyond a model centered on voice and SMS and instead prioritize the development of data services and a regulatory approach that adapts to the fast pace of technological innovation.

ONA roaming remains a premium revenue stream for high value travelers in the region. The imperative for MNOs remains the establishment of robust regional roaming and termination partnerships to service the segment.

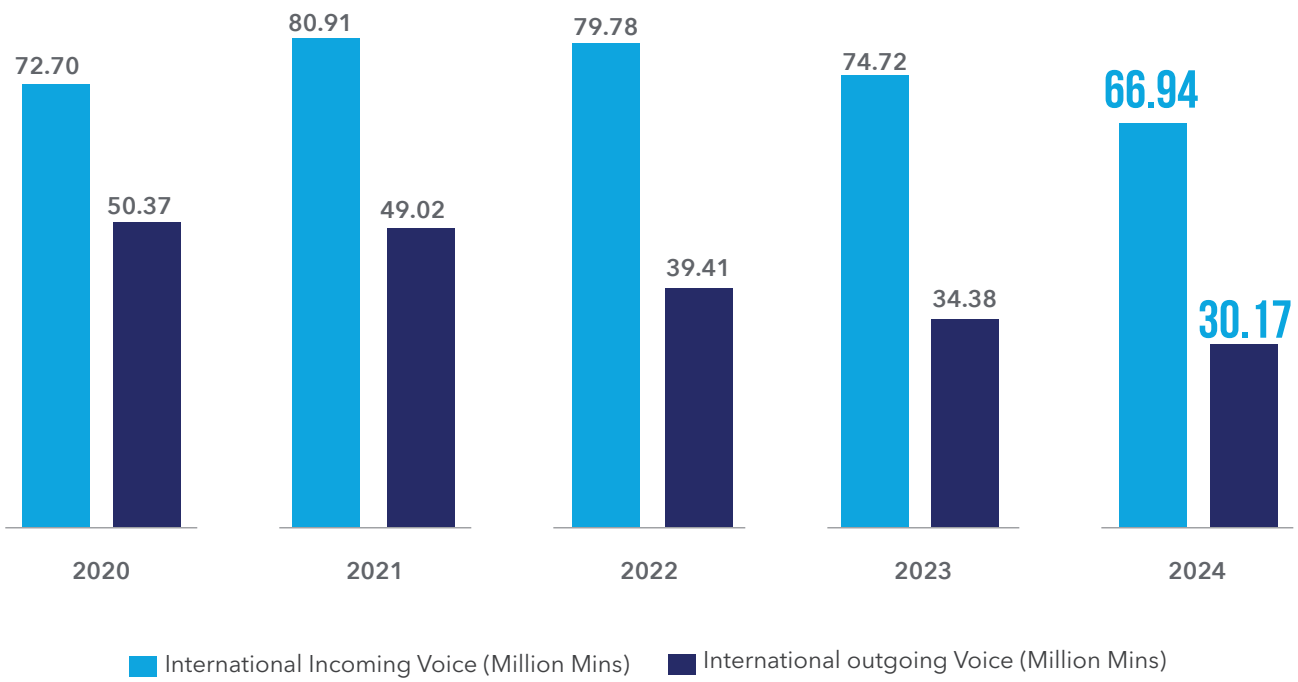
International Voice Traffic

The proliferation of smartphones, which have become an indispensable part of our daily lives and the primary gateway for communication, is slowly but definitively destabilizing traditional revenue streams in telecommunications, particularly international voice traffic.

As people increasingly adapt to Over-The-Top (OTT) platforms such as WhatsApp, which offer affordable, often free, alternatives to conventional voice services, the demand for traditional international voice calls is inevitably affected.

This global trend of declining international voice communication is indeed impacting Uganda's traffic, mirroring a worldwide pattern where traditional voice minute volumes are experiencing a steady drop.

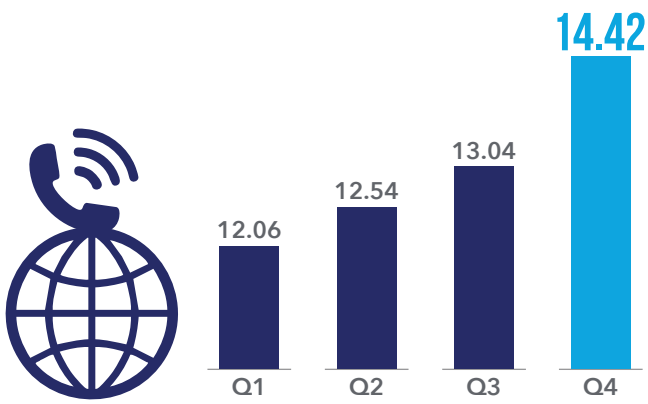
Figure 25 International Voice Traffic



In 2024, international voice traffic terminating into Uganda maintained double-digit growth, totaling 67 million minutes. Conversely, international voice traffic originating from Uganda totaled 30 million minutes in the same period. This echoes that a substantial volume of traditional international voice communication persists, catering for critical personal and business exchanges that may require the guaranteed quality and directness of a voice call.

A2P Traffic

Figure 26 International A2P Traffic (Billion Messages in 2024)



Application-to-Person (A2P) messaging traffic refers to automated, one-way messages sent from an application, system, or platform to a mobile device. Unlike standard Person-to-Person (P2P) messages, A2P messages are not sent by an individual and are crucial for businesses and service providers to communicate with their customers at scale.

In Uganda, this form of communication has become a driver of the country's digital economy, showing stable growth throughout 2024. The total traffic for the year totalled 52.06 billion messages, peaking at 12.06 billion in Q1 to 14.42 billion in Q4.

The growth in A2P traffic is directly linked to the growth in use cases of the digital economy and the proliferation of both domestic and international online services. A significant driver is the critical role of A2P messages in account and device authentication. For instance, offshore applications such as WhatsApp, Netflix, and Instagram, which are not resident in Uganda, rely heavily on A2P to send One-Time Passwords (OTPs) for user verification and account security.

A2P messaging is also crucial in enabling local commerce and fostering financial inclusion. Businesses in sectors such as the food and beverage industry and large retailers such as supermarkets utilize A2P messaging for sending order confirmations, delivery notifications, and promotional offers.

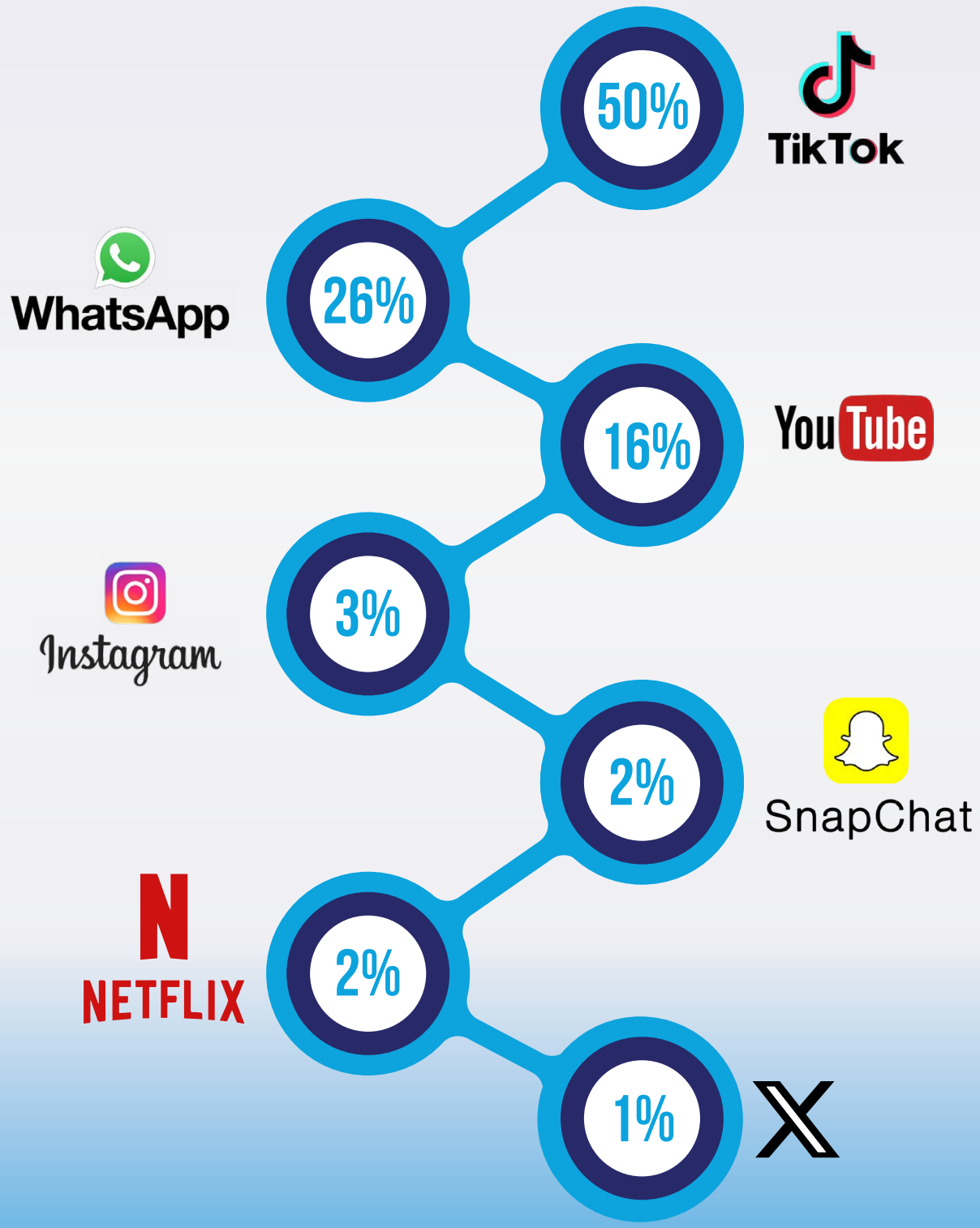
A2P messaging has become the key interplay between mobile money and smartphones, with services using these messages to send transaction confirmations, balance updates, and payment alerts. As such, domestic A2P traffic dominates the A2P traffic segment of Uganda, accounting for 99% of total A2P Traffic.

Social Media OTT Traffic

OTT social media consumption is a significant driver of both internet and smartphone adoption. In fact, social media alone accounts for over 40% of total internet traffic in Uganda.

Ugandan subscribers consumed a total of 344.5 million gigabytes (GBs) on select social media platforms in 2024. This translates to an average of 18 GBs per active mobile data subscriber per year (or 1.5 GBs per month) dedicated solely to social media content. A significant portion of this traffic was dominated by popular platforms, with WhatsApp, YouTube and TikTok together accounting for 92% of this OTT data consumption.

OTT Traffic by platform in 2024



The Golden Posts Initiative

Championed by UCC Executive Director Hon. Nyombi Thembo, the Golden Posts Initiative is a Transformative Online-to-Physical Engagement program conducted by the UCC to bridge the gap between online discourse and the tangible impact of government programs.

Hon. Nyombi Thembo, takes youth on experiential learning journeys where they visit real-world projects in health, education, infrastructure, and agriculture. This direct exposure to the firsthand outcomes of public investments is a strategic intervention to counter the misinformation and misconceptions amplified on social media. By enhancing youth awareness and fostering informed digital advocacy, the program strengthens public trust and successfully addresses the ICT usage gap, ensuring that digital engagement is fact-based, constructive, and aligned with national development goals like Vision 2040 and the National Development Plan (NDP III).

Unstructured Supplementary Service Delivery - USSD Traffic

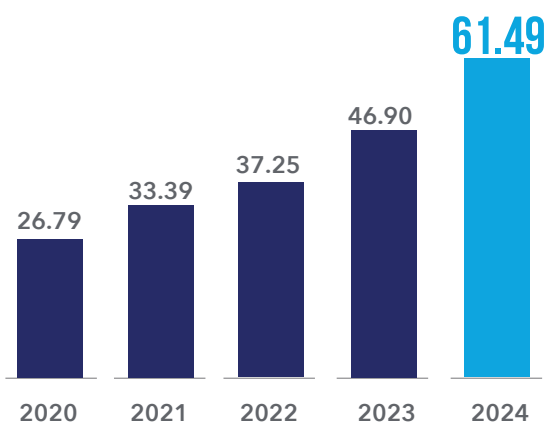
In the USSD space, USSD transaction sessions grew by over 30%, from 46.9 billion sessions in 2023 to 61.5 billion sessions in 2024.

The growth in USSD services was largely attributed to its role as a fundamental channel for accessing a wide array of mobile financial services. It served as the interface for essential and popular services such as voice and data bundle subscriptions, utility payments, and mobile money transactions.

A key factor driving USSD's continued relevance is its ability to support both smartphone and non-smartphone users. While smartphone adoption is steadily rising, a large portion of the telecom consumer base (61%) still relies on basic and feature phones.

USSD services work on any mobile device, regardless of internet connectivity, making them an inclusive solution. This is particularly crucial in rural areas where network access could be limited and reliable power for charging smartphones is a challenge. The long battery life of feature phones, combined with the no-internet requirement of USSD, makes it a highly practical and reliable channel for financial and other mobile services.

Figure 27 USSD Transactions in Billion Sessions (2020-2024)



A small business owner in Moroto market conducting business using her phone

Mobile Money Transactions

The dominance of Person-to-Person (P2P) transactions within Uganda's mobile financial services ecosystem continues to be a defining characteristic, aided by the widespread accessibility of USSD channels and short codes.

The volume of P2P transactions experienced a leap to 624.0 million transactions in 2024, up from 378.9 million in 2023.

Beyond P2P, the mobile money landscape in Uganda is demonstrating a clear diversification, with significant growth in other critical use cases such as cross border financial cashflows. International and cross-border transactions via mobile money are rapidly gaining prominence.

> **"The volume of Person-to-Person transactions experienced a leap to 624.0 million transactions in 2024, up from 378.9 million in 2023."**

Figure 28 P2P Transaction Volumes and Values (2022-2024)

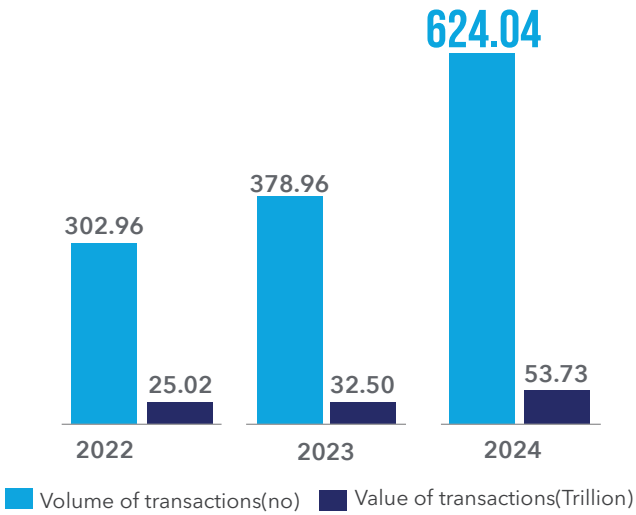
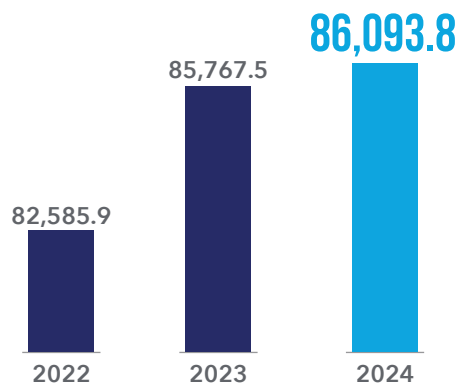


Figure 29 P2P Transaction value in Uganda Shillings



Products, Tariffs and Pricing

Business and Corporate Products

Businesses in Uganda are now looking for more than just simple internet access. They require advanced, reliable, and flexible digital infrastructure. This shift is pushing internet providers to offer a variety of integrated digital services that include:

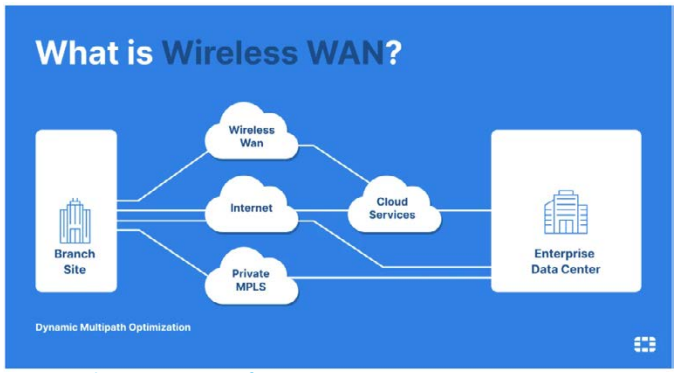
Reliable Internet and Cloud Connections: Companies are demanding guaranteed bandwidth and direct connections to cloud services. While many standard contracts include strict service level agreements (SLAs) with 99.9% uptime and financial penalties for downtime, these new offerings provide guaranteed speed without the complex legal agreements.

Dedicated High-Speed Connections: Corporate clients are increasingly requesting dedicated, low-latency connections for critical applications such as Enterprise Resource Planning (ERP), Customer Relationship Management (CRM), and Microsoft Office 365.

Pricing: The average cost for dedicated corporate connectivity with 99.9% uptime is between USD 15 and USD 25 per megabit per second (Mbps) per month.

Switch to SD-WAN: Companies with multiple offices are moving away from older technologies such as Multi-Protocol Label Switching (MPLS) and traditional Virtual Private Networks (VPNs). Instead, they are adopting Software-Defined Wide Area Network (SD-WAN) solutions. This allows them to have more flexibility and manage their entire network from a single, central location.

Figure 30 Wireless WAN



Source:https://www.fortinet.com/resources/cyberglossary/sd-wan-explained

Corporate communications have evolved beyond simple phone calls. Now, businesses are moving to Unified Communications as a Service (UCaaS). This brings together phone calls (Voice over Internet Protocol, or VoIP), video conferencing, and other collaboration tools into a single, easy-to-manage cloud platform. Think of popular services such as Microsoft Teams, Google Meet, and Zoom.

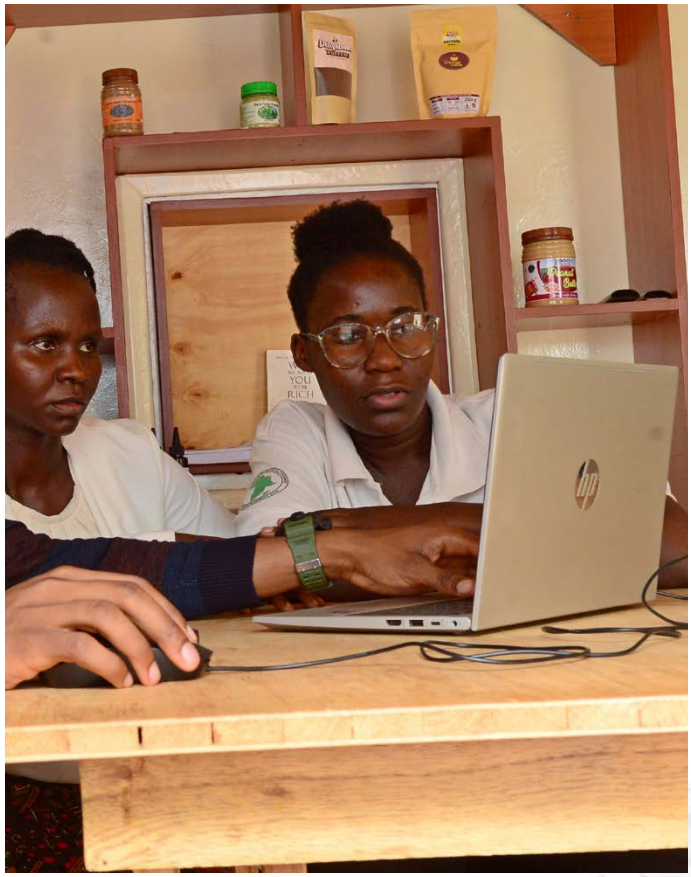


Figure 31 Top UCAAS Providers for 2024 brand to watch

Source:https://www.uctoday.com/unified-communications/top-ucaas-providers-for-2024-brands-to-watch/

Companies also have a growing need for local data storage and computing power. They're increasingly using data centers managed by telecom companies or other providers. This gives large corporations two key advantages:

01 Faster Access: It provides quicker, low-latency access to a data center's processing power.

02 Business Continuity: It offers a reliable off-site backup for their data, which is crucial for staying in business if something goes wrong.

Source: https://www.datacenter-asia.com/a-guide-to-common-data-center-use-cases/

Retail Mobile and Fixed Products

Double Play and Triple Play Services

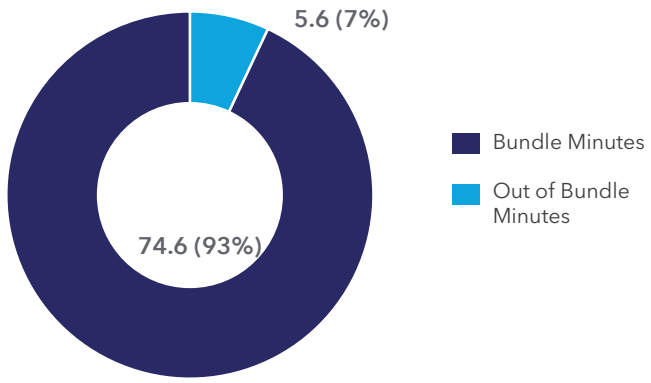
The biggest change in the retail mobile and home internet market is the increasing popularity of "Double Play" and "Triple Play" services. These packages combine two or three services–like voice calls, internet, and TV/multimedia–into a single subscription. In Uganda, Zuku Fiber and MTN Wakanet are the main players, together handling 12% of all fixed internet traffic.

Voice Bundles

In the mobile voice market, cross-network voice bundles were a key driver of voice traffic growth in 2024, accounting for almost a billion minutes of calls (0.95 billion). These bundles allow users to make calls across different mobile networks at a lower, more affordable rate.

As a result, consumer behavior is shifting gradually. Instead of buying airtime and paying a standard rate per minute, customers are now choosing these voice bundles for their lower cost. In fact, a significant 93% of all voice minutes on the local network are now generated from bundle usage.

Figure 32 Voice Traffic in Min by Consumption Type (Billion Minutes)

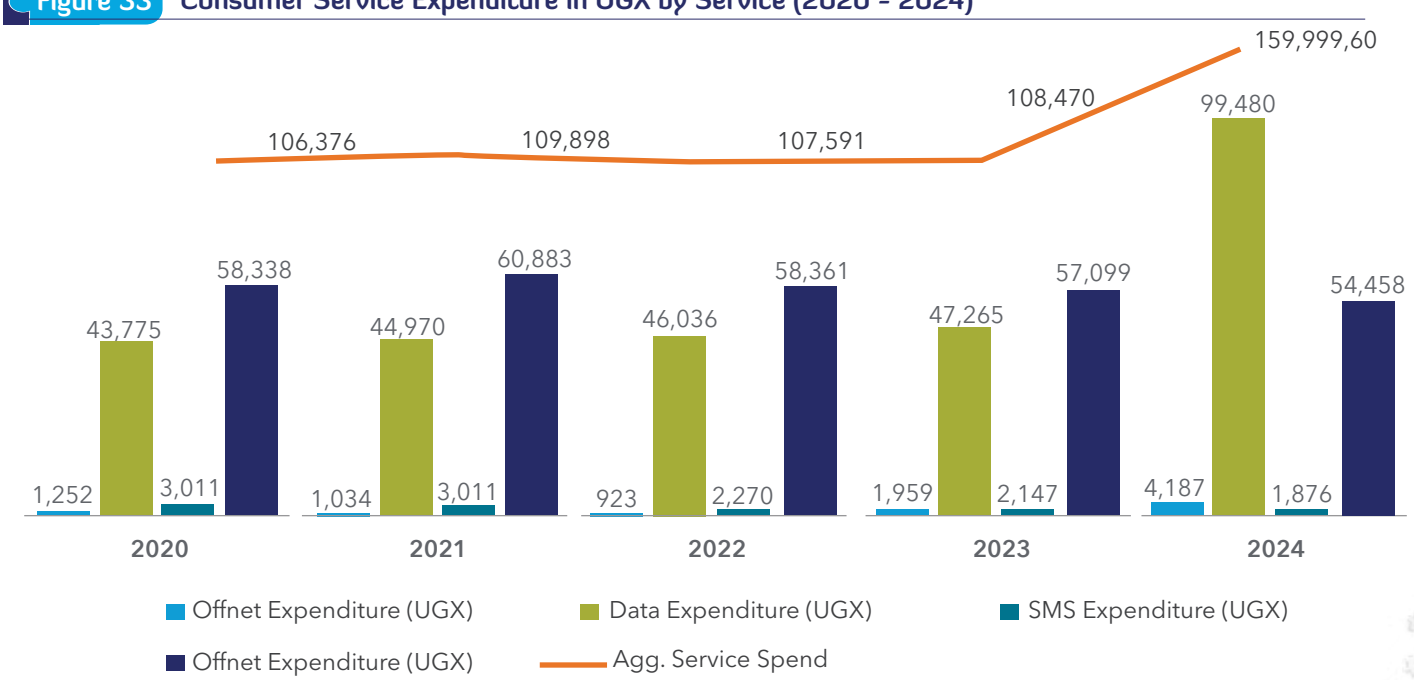


Data Bundles

Non-expiring data bundles such as "Freedom" and "Chillax" are gaining traction, making up 13% of total data usage (106 million GBs). Other types of data bundles, including daily, weekly, and monthly packages, as well as special weekend deals such as "Gaga Weekend" and "Freaky Weekend" account for the remaining 709.1 million GBs of data downloads.

Telecommunications Consumer Expenditure Profile

Figure 33 Consumer Service Expenditure in UGX by Service (2020 - 2024)



Bridging the Infrastructure Access and Usage Gaps in Telecommunications

Uganda has made significant strides in its telecommunications sector, yet a persistent digital divide continues to affect many households. Bridging these gaps is crucial to ensure every Ugandan can access, afford, and confidently use digital tools, unlocking new opportunities in education, business, health, and social connection. The digital divide in Uganda is comprised of three interconnected gaps, each presenting a unique challenge to achieving full digital inclusion:

01 The Coverage Gap: This is the most fundamental gap, affecting areas where people live without any mobile network signal. Without the physical infrastructure, such as towers or fiber optic cables, there is simply no way for communities to connect to the internet or telecommunications services.

02 The Access Gap: This gap affects individuals who are within a mobile network coverage area but are unable to make a meaningful connection. This may be due to a lack of a suitable device, such as a smartphone, or the high cost of data bundles. A lack of reliable electricity to charge devices also represents a significant barrier to a continuous link.

03 The Usage Gap: This final gap describes the situation where people have network access and a device but still do not use voice or internet services. This can be due to a variety of factors, including the cost of services, fear of online fraud, a lack of locally relevant content, or simply not knowing how to use digital tools effectively.

To close the digital divide, it is essential to address both the lack of physical infrastructure and the social and economic barriers that prevent people from using it. This requires a two-pronged approach: reducing tangible gaps, such as incomplete network coverage and limited device ownership, while also removing intangible barriers such as affordability, cultural norms, and low digital literacy.

Coverage Gap

From a business point of view, expanding networks into areas with few people or low incomes often does not make financial sense for private companies. As a result, much of the country still relies on 2G and 3G networks, which mainly support voice calls and mobile money rather than faster broadband speeds. The faster, broadband-focused networks that Uganda hopes to expand currently cover 58% of the country's land area. The overal coverage gap per technology is illustrated below:

Table 2 Mobile Network Coverage Gaps in Uganda

Technology	Geographic Coverage (%) based on 90% UCC Coverage Obligation	Land Area Covered (km²) based on 90% UCC Coverage Obligation	Coverage Gap (km²) based on 90% UCC Coverage Obligation
2G	75%	162,701	54,234
3G	72%	156,193	60,742
4G	58%	125,822	91,112

Uganda's Total Land Area is 241,038(km²)

These gaps are widest in rural, remote and mountainous areas where millions still lack consistent access to reliable voice and internet services. Infrastructure gaps are concentrated in sparsely populated regions, where the cost of building towers, extending fibre, and supplying power outweighs expected returns. In many remote communities, a phone signal may be several kilometres away in the trading centre or hilltop.

Mobile network coverage expansion is largely driven by cost, which has a host of inputs that include energy, taxes, permit approvals and demand for telecom services. These costs are largely driven by the following factors:

"Infrastructure gaps are concentrated in sparsely populated regions, where the cost of building towers, extending fibre, and supplying power outweighs expected returns."

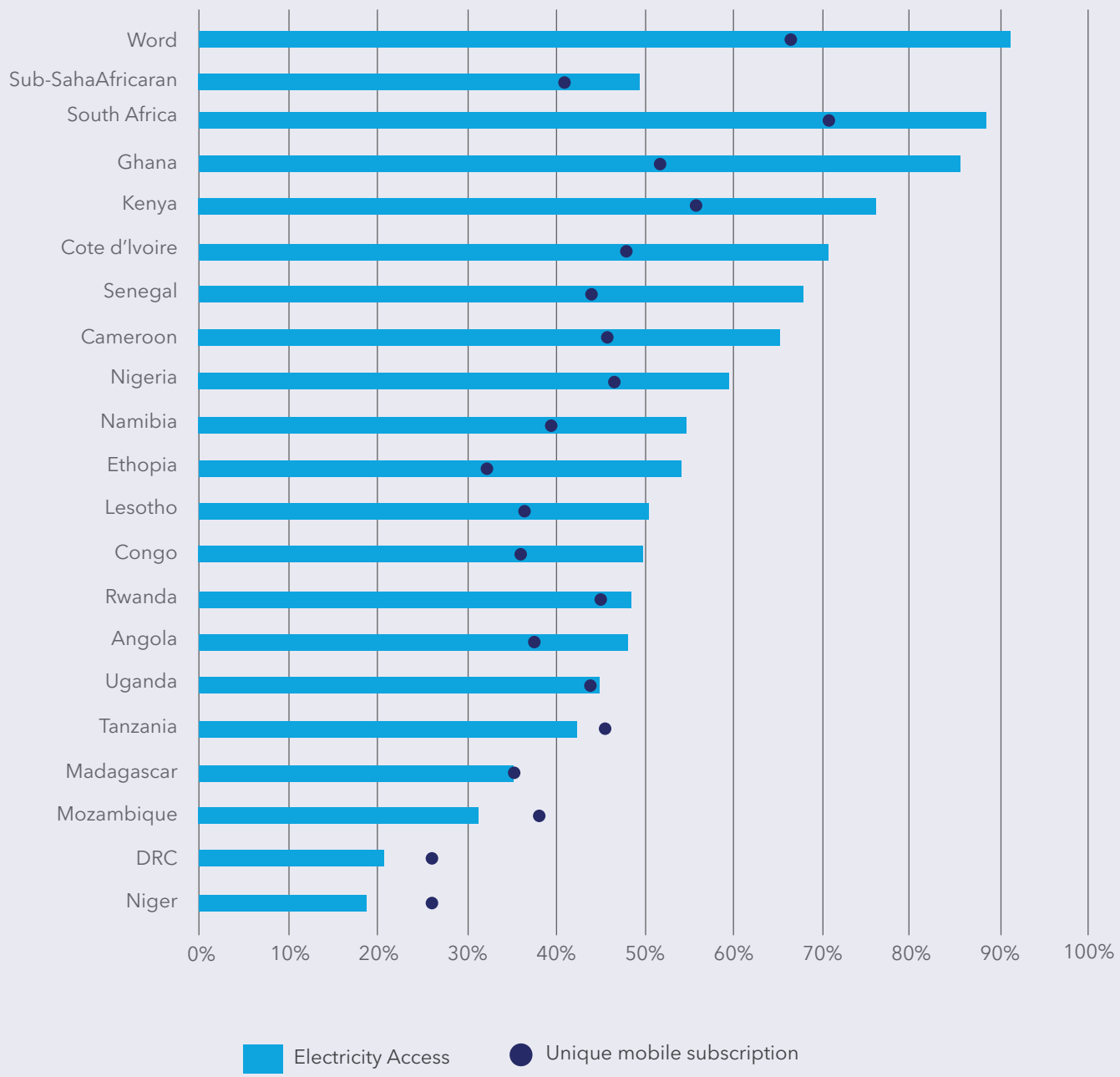
Limited Energy Access

Limited electricity access is a big challenge for setting up and running telecom towers. Only a quarter (25%) of Uganda has hydroelectric power, making it costly to keep networks running.

Power-related costs for the telecom sector are about USD 60 million each year, mainly because operators depend on more expensive options such as generators and solar instead of hydro power. Running the necessary equipment at each tower, such as transformers, solar panels, and backup generators can cost between USD 60,000 and USD 270,000 per site.

Because of this, over 780 network-ready towers in Uganda cannot operate due to lack of electricity. The importance of electricity for digital access is clear when compared to Kenya: with 76% electricity coverage, Kenya has 64% of its population using mobile services, while Uganda, with only 25% electricity coverage, has just 32% mobile usage.

Figure 34 Electricity Distribution and Unique Mobile Access Comparison with Regional Peers



Source: GSMA Intelligence and IEA Report - Energy Challenges for Mobile Networks in Sub Saharan Africa 2023

Multiple Permitting Requirements

Building telecom towers in environmentally sensitive areas managed by the Uganda Wildlife Authority (UWA) and the National Environment Management Authority (NEMA) is very costly.

Both agencies require operators to pay five years of rental fees in advance—USD 20,000 for UWA and USD 15,000 for NEMA—whether or not the tower earns back the investment in that time. These fees help fund environmental protection, but they push total site costs up to about USD 175,000. This makes it harder for operators to invest in towers in remote, low-population areas, even though these places still require connectivity.

The Tax Burden on Telecommunications Infrastructure

Telecom companies are among Uganda's largest taxpayers, with two operators consistently in the country's top five. However, multiple taxes raise the cost of operations. These taxes apply to services such as voice and data, as well as to infrastructure.

One key example is the 35% import tax on galvanized steel—a major material for tower construction. Since Uganda does not produce these steel components locally, operators have no choice but to import them at high cost. This not only inflates capital expenditure but also drives up the price of telecom services for end-users. Combined with the lack of local supply, this tax burden makes it harder to expand networks, particularly in underserved areas, exacerbating the existing access gaps.

Logistical barriers to network roll outs in remote areas

Some parts of Uganda's rural landscape pose significant challenges for telecommunications infrastructure development.

Rugged terrain and the lack of proper roads make transporting heavy tower components difficult and expensive. Trucks carrying equipment can get stuck in muddy stretches for days, leading to costly delays. In mountainous regions, narrow and winding roads can also make it challenging to access remote tower sites.

During the rainy season, some areas become completely cut off due to landslides and flooding. These conditions not only delay new installations but also prevent timely repairs to existing sites. A tower that might take a week to build in an urban area can take months to complete in a rural setting, making it difficult for operators to justify the investment. These delays and associated costs ultimately disincentivize telecommunications companies from investing in underserved areas.

Commercial Viability and National Coverage Obligations

Ugandan telecom licenses require operators to cover at least 90% of their licensed areas. However, building towers and fiber networks is expensive, so operators focus on areas with more people and stronger economic activity.

The Kampala and Buganda sub-regions, home to about 12.9 million people (30% of the population), have seen the fastest growth in fiber and tower infrastructure. Most Internet Service Providers (ISPs) also launch services here first, making it the most competitive region. In contrast, the other 12 sub-regions have fewer than 4.3 million people each, making them less attractive for big infrastructure investments. As a result, rollout is slower in these regions.

This imbalance is clear in tower distribution: the Central region has 44% of all towers in Uganda, with Kampala and Wakiso alone hosting about 1,841 out of 2,312 towers in the region—around 80% of the total.

"Extending telecommunication coverage requires more than building towers."

It also depends on reliable roads, stable electricity and strong backhaul links to the national network. Bridging these infrastructure gaps has become a priority, with ongoing efforts focusing on shared towers, renewable energy solutions, and targeted rollouts in underserved areas.

Addressing Infrastructure Gaps in Telecommunications

Extending telecommunication coverage requires more than building towers. It also depends on reliable roads, stable electricity and strong backhaul links to the national network. Bridging these infrastructure gaps has become a priority, with ongoing efforts focusing on shared towers, renewable energy solutions, and targeted rollouts in underserved areas. This section highlights interventions currently underway.

Tower Subsidies in Underserved and Unserved Communities

Since the early 2000s, Uganda's commitment to bridging the digital divide has been guided by the policies of the Rural Communications Development Fund (RCDF). The fund operated through three distinct phases: RCDF I (2003–2009), RCDF II (2010–2016), and RCDF III (2017–2023). Over these cycles, the policies and programs evolved to address broader ICT goals, moving from simply extending basic connectivity to tackling the more complex access and usage gaps that persist across the country.

The RCDF has since been integrated into the new Uganda Communications Universal Service and Access Fund (UCUSAF) Strategic Plan IV, which aims to achieve "Digital Inclusivity through sustainable interventions and impactful collaborations." This plan, which runs through 2028, is anchored in four strategic themes: Access, Adoption and Usage, Value Creation, and Cooperation. It represents a shift from a purely infrastructure-focused approach to a more holistic strategy that addresses the full spectrum of digital inclusion challenges.

To effectively tackle the foundational access challenges, UCUSAF continued with its key initiative within its new strategy: the Access Infrastructure Program. While working closely with tower providers, this program has to date supported the construction of 63 new telecom sites. These new sites build on earlier achievements, including the upgrade of 90 sites from 2G to 3G and the rollout of 65 new 4G sites since 2008.

Recognizing that electricity isn't always available and that investing in it isn't always profitable for telecom companies in certain areas, UCUSAF deployed solar-powered towers. This helped overcome the challenge of powering sites in off-grid areas. At the same time, coverage mapping tools were used to make sure the infrastructure was placed where it was needed most

So far, progress has been made, with key beneficiary communities including Kasimbi, Nyambigha (Karugutu), Kyazirimu (Kyebando), Kagara (Kabuyanda), Lyabana (Island), and Kyampangara (Kazo).

Looking forward, UCUSAF plans to roll out 200 additional sites in the next five years, focusing on 117 sub-counties with less than 30% 3G coverage, thereby narrowing the digital divide in rural Uganda.

Greening Telecom Towers

The Green Sites Initiative promotes renewable energy for towers, targeting 40% emissions cut by 2035. Since 2017, Uganda has rolled out 2,600 fully green sites, aiming for 7,000 by 2035. To address energy challenges and promote environmental sustainability, the telecommunications tower infrastructure providers have made substantial investments in green sites. These are telecommunication towers powered by environmentally friendly energy sources such as solar power and lithium-ion batteries. The sites are engineered to significantly reduce greenhouse gas emissions and improve energy efficiency.

As part of a continent-wide effort, the Green Sites Initiative in Uganda aims to ensure that all new tower sites emit less than four metric tons of carbon dioxide equivalent ($MTCO_2e$) per year, targeting a 40% reduction in emissions by 2035. Since its inception in 2017, the industry has rolled out 2,600 fully green sites with no dependence on hydroelectric power. By 2035, the goal is to expand this portfolio to 7,000 green tower sites nationwide.

Infrastructure Sharing

Infrastructure sharing is increasingly being adopted by telecommunications service providers as a cost-effective way to expand connectivity to underserved areas. Major telecom operators are partnering with independent tower companies, allowing multiple providers to use the same sites. This approach reduces capital and maintenance costs, speeds up rural rollout, and ensures that more communities gain coverage without the environmental and financial burden of duplicating infrastructure.

Cross-Sector Collaboration

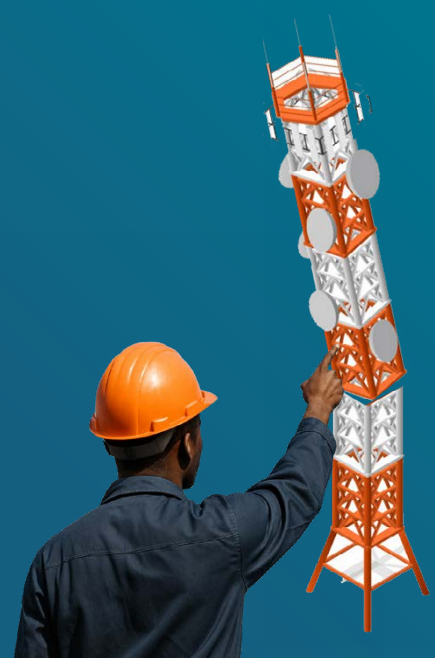
ICTs are increasingly recognized as enablers of socio-economic development. In 2024, the Commission and various stakeholders, including the ICT, energy, aviation, and security sectors, held a series of strategic forums to address challenges in the telecom infrastructure space. Key among these were:

- The ICT Infrastructure Vandalism Forum
- The ICT–Energy Infrastructure Forum

These engagements were organized in collaboration with relevant MDAs, including the Ministry of Security, Ministry of Energy and Mineral Development, and several Mobile Network Operators. The outcomes included the development of annual scorecards for progress tracking, joint projects, and collective actions to address challenges related to energy access, sector taxation, infrastructure vandalism, and security

United against Vandalism

On April 8, 2024, UCC and American Tower Corporation (ATC Uganda) held a pivotal forum in Kampala with ICT stakeholders, including regulators, telecom operators, and security officials, to combat the increasing vandalism of communication infrastructure in Uganda. The Permanent Secretary of the Ministry of ICT, Dr. Aminah Zawedde, stressed that destroying telecom equipment is economic sabotage requiring strong legal and operational responses. Discussions focused on classifying telecom infrastructure as critical national installations, imposing harsher penalties on offenders, and regulating the scrap metal trade linked to thefts that disrupt essential services and socio-economic progress. UCC's Director Industry Affairs, Ms. Julianne Mweheire, called for unified stakeholder action against vandalism, while ATC Uganda CEO Dorothy Kabagambe Ssemanda underscored the vital role of critical infrastructure in maintaining health, safety, security, and economic prosperity, warning of grave consequences from any damage.



Closing the digital divide requires much more than expanding infrastructure. It demands targeted efforts to improve affordability, access to internet-enabled devices, digital skills, and online safety.

While mobile network coverage in Uganda has grown significantly, millions of people remain offline. This persistent disconnect is not solely due to the absence of infrastructure, but also the result of deeper social, economic, and technological barriers that affect both access to and usage of mobile services.

Access involves the basic ability to connect—owning a mobile device, having a SIM card, and being able to afford airtime or data. Yet access alone does not guarantee meaningful use of mobile internet services.

This brings us to the usage gap—referring to individuals who live within mobile network coverage areas but are not actively using mobile internet, for other services such as broadband, above and beyond basic voice and mobile finance. Several factors contribute to this gap, including: device limitations, such as owning a basic or feature phone with little or no internet capability, High costs, particularly of smartphones and mobile data, Low digital literacy and a lack of relevant online content, Social and cultural barriers, including safety concerns or norms that discourage usage.

These challenges highlight that closing the digital divide requires much more than expanding infrastructure. It demands targeted efforts to improve affordability, access to internet-enabled devices, digital skills, and online safety.

Uganda's mobile usage gap stood at 34% in 2024 representing approximately 7.5 million adults who are not using mobile services, despite the presence of mobile coverage.

Poverty and Affordability of ICT Services

Poverty is still a major barrier to mobile phone access and use in Uganda. While the country's mobile teledensity reached about 90 lines per 100 people in 2024, showing rapid adoption, these numbers hide big differences among people.

Uganda's Telecom Policy Instrument, specifically the Regulation of Interception of Communications Regulations (RICR, 2023) requires a national ID to register for mobile services, so only the 22.23 million adults aged 18 and above can get mobile connections. Of these, 66% (about 14.7 million) currently use mobile services.

This has helped Uganda score well in the ITU's mobile gender gap ranking, with a score of 1.07—higher than the global range of 0.98–1.02—showing that women in Uganda use mobile services almost as much as men.

Despite this progress, many adults are still without mobile services. Around 7.5 million adults do not have a mobile connection, including 4.9 million women and 2.6 million men. The 7.5 million estimate is close to the national absolute poverty estimate according to the national statistical office, highlighting a strong link between poverty and mobile connectivity.

Affordability is not just about the cost of calls or data—it is also tied to income and financial struggles. According to the latest Uganda Bureau of Statistics survey, 16.1% of Ugandans live on less than $1 a day, which amounts to about 7.4 million people, with 5.4 million in rural areas and 2 million in urban areas.

Table 3 Poverty Distribution Across the Country

Sub Region	Poverty Population Share by Sub Region
Karamoja	990,363
Busoga	886,893
Buganda	812,985
West Nile	768,640
Bukedi	761,250
Teso	746,468
Lango	509,963
Bunyoro	480,400
Acholi	406,492
Tooro	391,711
Elgon	332,585
Kigezi	177,379
Ankole	110,862
Kampala	22,172

Source: Uganda Bureau of Statistics Census, 2024

The regions most affected by poverty include Karamoja and the Busoga sub-region, followed by Buganda, West Nile, and finally Bukedi and Teso, each recording over 700,000 residents living below the USD 1 threshold for absolute poverty.

As a result of this widespread poverty, households and individuals prioritize spending on basic necessities such as food, housing, water, electricity, and education. On average, telecommunication services account for only about 3% of household and individual expenditure.

Table 4 **Household Expenditure Per Line Item**

Item grouping by COICOP	Kampala	Central	Eastern	Northern	Western	Av.Expenditure
Insurance	0.1	0.1	0	0.1	0.1	0.08
Recreation and culture	0.2	0.1	0.1	0.1	0.1	0.12
Alcoholic beverages, tobacco and spirits	0.4	0.6	0.4	1.1	0.5	0.6
Clothing and footwear	2.7	2.5	2	2.2	2.1	2.3
Furnishing, household equipment	2	2.2	2.4	2.6	2.3	2.3
Non-consumption expenditures	3.1	2.8	3.4	3.3	2.6	3.04
Communication	4.9	3.8	2.7	1.8	2.1	3.06
Miscellaneous goods and services	5	4.6	2.2	2.1	4.1	3.6
Health	4.1	3.9	6.3	4.1	5.3	4.74
Transport	8.3	9.1	4.4	4.5	4.3	6.12
Restaurants and hotels	10	6.4	4.3	6.2	3.7	6.12
Education	11	9.6	8.4	6.3	7.7	8.6
Housing, water, electricity, gas and other fuels	21.5	18.4	14.8	13	13.6	16.26
Food and non-alcoholic beverages	26.6	35.9	48.7	52.6	51.5	43.06
Total	100	100	100	100	100	100

Source: Uganda Bureau of Statistics 2024 Census Data

Device Penetration and Its Linkage with Energy and Device Taxation

While digital adoption and usage are steadily increasing in Uganda, a major barrier particularly in terms of device penetration and the full realization of mobile device benefits remains the country's persistent household energy deficit.

Energy Access

Keeping mobile devices charged is as critical as owning the device. In many Ugandan households, the absence of reliable electricity turns mobile devices into occasional luxuries rather than daily tools. This gap is especially pronounced in rural and off-grid areas, where even if mobile coverage exists, the lack of electricity limits the ability to use devices for work, education, or essential services.

53% of the households in Uganda have access to an electricty source, with 2.7 million households served by the national hydroelectric power grid, and 3 million covered by off grid energy solutions such as solar power. This translates into an estimated 23 million Ugandans that lack any form of consistent electricity access.

For these individuals, the lack of reliable power is a direct obstacle to mobile ownership and effective usage, especially of smartphones. Devices such as smartphones and tablets, which rely on continuous internet connectivity and have power-intensive features such as large screens and powerful processors, require frequent charging.

In the absence of electricity, owning such devices becomes impractical, and their digital benefits such as internet access and app-based services remain largely inaccessible. Consequently, these communities tend to rely on basic and feature phones, which offer longer battery life and support essential services such as voice calls.

Device Taxation

In addition to poverty, taxation on mobile devices significantly affects mobile service adoption. Although mobile data in Uganda is relatively affordable, averaging USD1.40 per GB, the second lowest in the region after Rwanda, the market is still dominated by basic and feature phones, with nearly 30 million in circulation. These devices are popular largely due to their lower cost and the absence of internet functionality.

This means that while data services may appear affordable, the high upfront cost of smartphones, particularly those taxed at 40%, remains a key barrier. Low-cost smartphones average around USD 50, while internet-enabled feature phones cost roughly USD 20. The high cost of entry continues to drive users toward more affordable, non-smart devices, limiting the growth of Uganda's ICT economy.

Cultural Norms

Beyond cost, cultural attitudes also limit service access. In some families and communities, women and young people face restrictions or disapproval for owning a mobile device, limiting their independence and access to services. In such settings, phone ownership is seen as unnecessary, inappropriate, or a source of moral concern. These social pressures, combined with poverty, reduce the number of people who can benefit from digital tools.

Digital Literacy

Access to infrastructure and affordability are only part of the digital divide. A significant usage gap persists due to low digital literacy. According to Uganda's national statistical office, approximately 12 million Ugandans are illiterate.

Many of these individuals, particularly in rural and underserved communities, may own mobile devices but lack the skills or confidence to use them effectively for productive purposes. This digital literacy gap hinders the uptake of services such as e-governance, e-health, and e-learning, further entrenching digital exclusion.

Digital Service Use Cases and Relevant Content

The typical Ugandan subscribes to mobile services or purchases a mobile device primarily for voice communication, mobile money, or internet access. Within households, mobile devices are often used predominantly for internet access, particularly for social media and entertainment.

Platforms such as WhatsApp, Twitter (X), Instagram, Snapchat, and TikTok account for nearly 40% of Uganda's internet traffic. While these platforms offer audio-visual content and entertainment, they do not necessarily translate into more productive or transformative uses of the internet—such as accessing government services like renewing passports or registering for national IDs.

The absence of mobile-centric digital solutions that address everyday challenges limits the broader adoption of ICT in Ugandan society. Without services that offer clear, practical value, especially from the government, mobile internet usage remains narrowly focused on entertainment.

Mobile Fraud

The rapid expansion of digital financial services—particularly mobile money—has been accompanied by a sharp increase in mobile fraud in 2024. Common fraud methods include identity theft, phishing, vishing (scam phone calls), malware, ATM fraud, SIM swaps, and SMS scams.

26th July 2024: UCC launched a task force on Artificial Intelligence made up of experts and academia.

In 2024, fraud-related complaints submitted to major Mobile Network Operators (MNOs) saw the second-largest year-on-year increase, after complaints about service quality. Fraud complaints tripled to 146,000 in 2024, up from 46,000 in 2023.

This growth in fraud is undermining trust in digital platforms. As a result, some users are reverting to more traditional, less convenient financial services, threatening the progress made in financial inclusion through digital means.

Cyber Security

As more Ugandans use mobile phones for internet access, money transfers, and communication, cyber threats targeting mobile devices are also rising sharply. Cybersecurity has become a major concern in the telecom industry especially when it comes to mobile safety.

To monitor these threats, UCC uses a Cyber Threat Intelligence (CTI) platform that rates how well telecom companies are protecting users from cyber risks. The system scores range from 250 (very poor) to 900 (very strong).

For the 2024/25 financial year, Uganda's telecom sector scored 577.5 –a slight improvement from last year's 572.5. But this score still falls in the "basic" category, meaning the industry remains at high risk of cyber threats.

Malware and Adware

Out of the top 10 types of malware detected in Uganda during the past year, 9 were specifically made to attack mobile devices. The most common one InMobi Android malware infected over 4.4 million devices, showing just how vulnerable mobile users are. These threats often come hidden in apps, pop-up ads, or even in what appear to be harmless downloads.

A big part of the malware problem is adware, malicious software that floods users with unwanted ads, redirects them to suspicious websites, and collects data without permission. This not only worsens the user experience but also opens the door for more serious cyber attacks.

Rise of Artificial Intelligence (AI) -Powered Scams

In the last year, scammers began using AI-generated voices and videos to impersonate well-known government officials and company executives. These deepfake scams are often part of phishing attacks – fake emails or messages designed to trick people into giving away money or sensitive information. Because AI makes them look and sound real, they are harder to spot and more effective.

Bridging the Access and Usage Gaps

Addressing Affordability Through Industry Costing

In 2024, UCC planned to conduct an industry service and infrastructure costing exercise in the telecom sector. The purpose of this exercise was to create reference rates for wholesale and retail telecom markets, including towers, fiber, mobile and fixed voice and data services, among others.
In engagement with the telecom operators, these assessments will set the base rates that shall be used as basis to derive cost-based tariff regimes for shared infrastructure, efficient energy solutions (reducing reliance on expensive diesel generators at tower sites), and optimizing network deployment strategies, especially in hard-to-reach areas.

The focus is on creating an environment where operators can reduce their expenditure without compromising service quality, thus enabling industry affordability at the end-user point.

Collaborative Efforts to Ease the Tax Burden

2024 saw the establishment of the inaugural smartphone task force team, that comprises of Ministry of ICT & National Guidance, UCC, Ministry of Finance, Planning and Economic Development (MFPED), as well as Uganda Revenue Authority.

The task force was created to discuss proposals aimed at increasing smartphone penetration in Uganda. One of the key proposals is the review of existing tax policies on smartphones and other ICT devices.

The task force will be charged with writing proposals to increase smartphone use, leading to greater digital inclusion, ultimately expanding the tax base from an increase in digital transactions and economic activity.

Safeguarding the Digital Frontier

Early 2024 saw the implementation of the registration of SIM cards under the Regulations of Interception of Communications Act (RICA). The act was developed to combat digital identity fraud in the sector. By linking SIM cards to national identity documents, the RICA aimed to enhance traceability and accountability, making it harder for fraudsters to operate anonymously.

The RICA has become a vital legal instrument for building a secure foundation for digital transactions and curbing SIM swap fraud, a common tactic used to gain unauthorized access to mobile money accounts.

UCC CERT Interventions:

UCC CERT Interventions:

The Uganda National Computer Emergency Response Team (CERT), operating under the UCC, is at the forefront of combating cyber threats. Their interventions in 2024 included:

Proactive Monitoring and Threat Intelligence:
CERT continuously monitors the cyber landscape for emerging threats, vulnerabilities, and attack vectors, disseminating timely alerts and advisories to the public and critical infrastructure stakeholders.

Incident Response and Coordination:
In cases of cyber incidents, CERT provides technical assistance and coordinates response efforts with affected organizations, law enforcement agencies, and other relevant bodies to mitigate impact and recover systems.

Public Awareness Campaigns:
Recognizing that human error is often a weak link, CERT actively conducts public awareness campaigns to educate users on cybersecurity best practices, identify phishing attempts, and protect personal and financial information. These campaigns extend to rural communities to build trust in digital financial services.

Capacity Building:
CERT works on strengthening the cybersecurity capabilities of various entities, including financial institutions and telecom operators, through training programs and knowledge sharing.

The National Development Plan's Digital Transformation Programme positions ICT as a core driver of Uganda's socio-economic growth, with the Commission playing a crucial role in expanding connectivity, digital skills, and cybersecurity to achieve an inclusive digital future

Bridging the Digital Divide: The UCC's Role in Uganda's National Development Plan

The National Development Plan (NDP) is a series of five-year strategic blueprints that guide Uganda's socioeconomic journey toward achieving Vision 2040, a goal to transform the country into a modern and prosperous nation. The NDPs have evolved over time, with each plan building upon the foundation laid by its predecessor. This progression has culminated in the Digital Transformation Programme, which is a key component of NDP III and NDP IV, and assigns a crucial role to the Commission.

The initial NDPs focused on building the country's foundational economic and social structures, with ICTs playing a supportive, but not central, role.

NDP I (2010/11–2014/15): Focused on "growth, employment and socioeconomic transformation for prosperity," concentrating on structural change and building economic capacity.

NDP II (2015/16–2019/20): Aimed to "strengthen the country's competitiveness for sustainable wealth creation, employment and inclusive growth," with an increased focus on infrastructure and human capital development.

NDP III (2020/21–2024/25): Marked a shift by introducing a program-based approach. Its goal was to improve the quality of life for Ugandans through "sustainable industrialization for inclusive growth, employment and wealth creation." This plan explicitly brought the Digital Transformation Programme to the forefront, recognizing ICT as a core driver of national development.

NDP IV (2025/26–2029/30): The first of three plans to implement the government's strategy for achieving ten-fold economic growth by 2040. NDP IV's goal is to "Achieve higher household incomes, full monetization of the economy, and employment for sustainable socio-economic transformation." This plan fully embeds the digital transformation agenda into the country's development framework.

The NDP IV sets clear targets for achieving a truly inclusive digital Uganda. Key targets include:

01 **Increase ICT connectivity across the country:** This includes extending broadband infrastructure and high-speed internet to schools, hospitals, and local government offices.

02 **Increase uptake of digital products and services:** This involves implementing digital skills training programs to empower Ugandans with the knowledge to use digital tools for social and economic benefit.

03 **Increase cybersecurity and data protection:** This entails the enforcement of the Data Protection and Privacy Act to build trust and confidence in the digital ecosystem.

Over the next five years, the Commission will implement clear projects and programs to meet these targets, ensuring that its regulatory and developmental initiatives enable digital adoption at all levels of the country's development agenda.

Addressing the Access and Usage Gaps through the Universal Service Access Fund

Access Gaps

While expanding infrastructure remains critical, ensuring equitable access to ICT services is equally important. Many schools, health facilities, and community institutions remain disconnected, while affordability challenges continue to exclude marginalised groups.

To address these gaps, UCUSAF complemented its infrastructure investments with community-focused programmes that extend ICT access to the grassroots.

In the education sector, more than 500 schools were supported in 2024. This included the establishment of 61 ICT laboratories, deployment of 127 e-learning platforms and digital science resources, and the launch of 100 ICT clubs.

At the community level, UCUSAF installed Internet Points of Presence (PoPs) at local government headquarters to strengthen access to e-government services and information. In 20 districts, farmers benefited from digital agriculture training, which enhanced their ability to use ICT for agriculture, digital payments, and access to essential e-government services such as TIN registration and NSSF enrolment. These initiatives not only expand access but also promote transparency and efficiency in value chains critical to Uganda's socio-economic development.

Usage Gaps

Beyond connectivity, Uganda continues to face challenges in enabling meaningful ICT usage. Low digital literacy limited local content, and inadequate awareness of safe online practices remain key barriers.

In 2024, UCUSAF implemented targeted digital skilling and inclusion programmes to address these gaps.

Through the Youth Multimedia Skilling Programme, more than 1,000 young people across ten districts were trained in content creation, multimedia production, and social media marketing. Delivered in partnership with non-profit organisations, the programme empowered youth with professional digital skills, enhanced employability, and strengthened participation in the growing creative economy.

In partnership with Makerere University's College of Computing and Information Sciences (CoCIS), UCUSAF trained 2,643 participants from 15 rural districts in basic digital literacy. This initiative contributes directly to Uganda's national goal of raising digital literacy from 26% in 2023/24 to 36% by 2029/30.

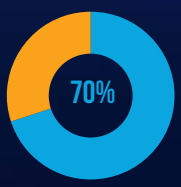
Inclusion also remained a priority. Working with the National Union of Persons with Disabilities (NUDIPU) and Eight Tech Consults, UCUSAF delivered digital skilling programmes tailored to the needs of more than 10,000 PWDs and equipped four ICT hubs with assistive technologies. A National Digital Observatory was developed—accessible via mobile app, website, and USSD—while 35 district union websites were launched to support advocacy and service delivery for PWDs.

Digital Skilling Empowerment

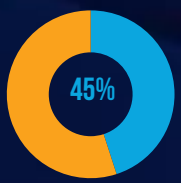
In 2024, UCC through UCUSAF supported over 500 schools by establishing 61 ICT labs, deploying 127 e-learning platforms, and launching 100 ICT clubs. At the community level, Internet Points of Presence were installed in local government headquarters across 20 districts, benefiting farmers with digital agriculture training. The Youth Multimedia Skilling Programme trained more than 1,000 young people in ten districts, while 2,643 participants from 15 rural districts received basic digital literacy training in partnership with Makerere University. Additionally, over 10,000 persons with disabilities (PWDs) were digitally skilled, four ICT hubs were equipped with assistive technologies, and 35 district union websites were launched to enhance advocacy and services for PWDs.

Forward Outlook

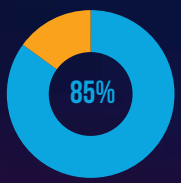
UCUSAF's interventions in coverage, access, and usage are laying a strong foundation for Uganda's digital transformation. By 2029/30, Uganda targets:



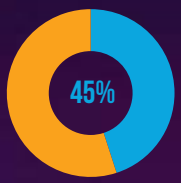
70% broadband coverage at minimum speeds of 8 Mbps



An increase in internet penetration from 20% to **45%**



Expansion of parish-level broadband access from 72% to **85%**



A doubling of commercialized local digital products from 23% to **45%**

To achieve these targets, UCC and UCUSAF are prioritising the rollout of **200 new telecom sites**, scaling up nationwide digital skilling programmes, and expanding inclusive initiatives for schools, farmers, and vulnerable groups.

Central to this effort is a partnership-driven model that leverages the expertise and resources of government agencies, development partners, academia, civil society, and the private sector.

Vision 2029/30: Laying a strong foundation for Uganda's digital transformation.

UCC through UCUSAF, actively distributes solar-powered and dual-grid tablets to underserved and unserved households, communities, and vulnerable groups as part of a multi-phase program aimed at enhancing digital inclusion, literacy, and access to ICT services nationwide.

Telecom Finance and Investment

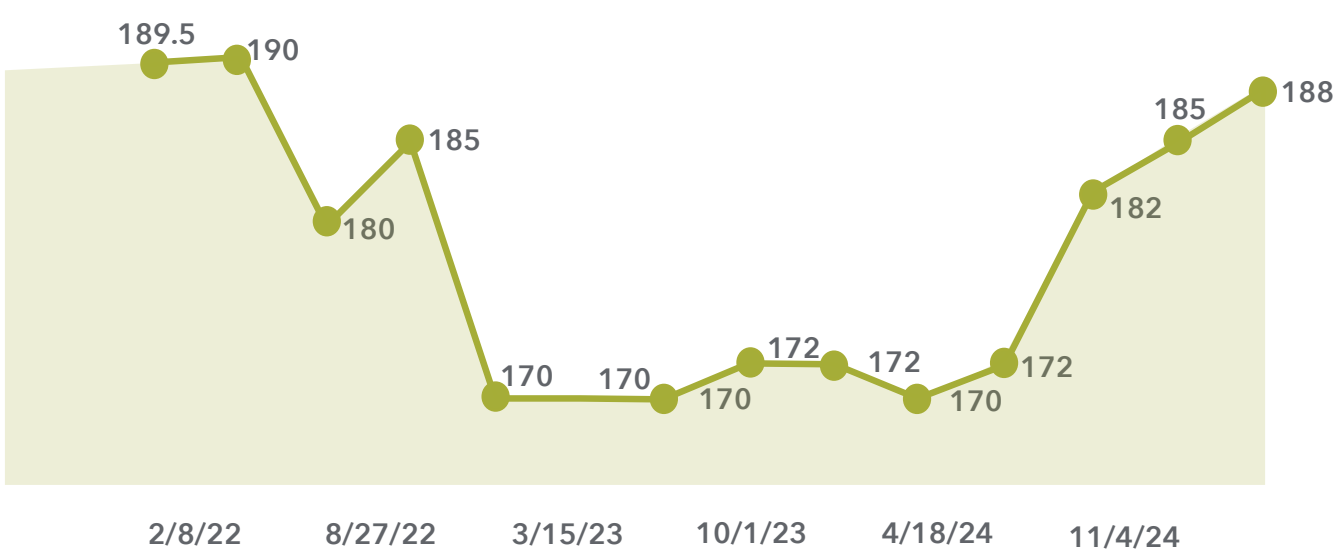
The sector continued to break its previous financial performance across various metrics such as revenue, new investment, fundraising, Average Revenue Per User - ARPU, Earnings Before Interest, Taxes, Depreciation, and Amortization - EBITDA and profitability. These are discussed in some detail.

Market Capitalization and Share Prices

MTN Uganda Limited

Probably the most important sectoral movements on the local exchange were MTN's Secondary Offer Mid 2024, which was designed to offload the remaining obligatory listing of 7.03% stake. The offer price of UGX 170 per share was oversubscribed, indicating renewed investor confidence after a volatile post-IPO period in 2022, which had seen the IPO share price drop below UGX 200.

Figure 35 MTN Uganda's Share Price Trend (2021 - 2024)



With this price rally, MTN solidified its position as the most valuable and liquid counter on the Uganda Securities Stock Exchange.

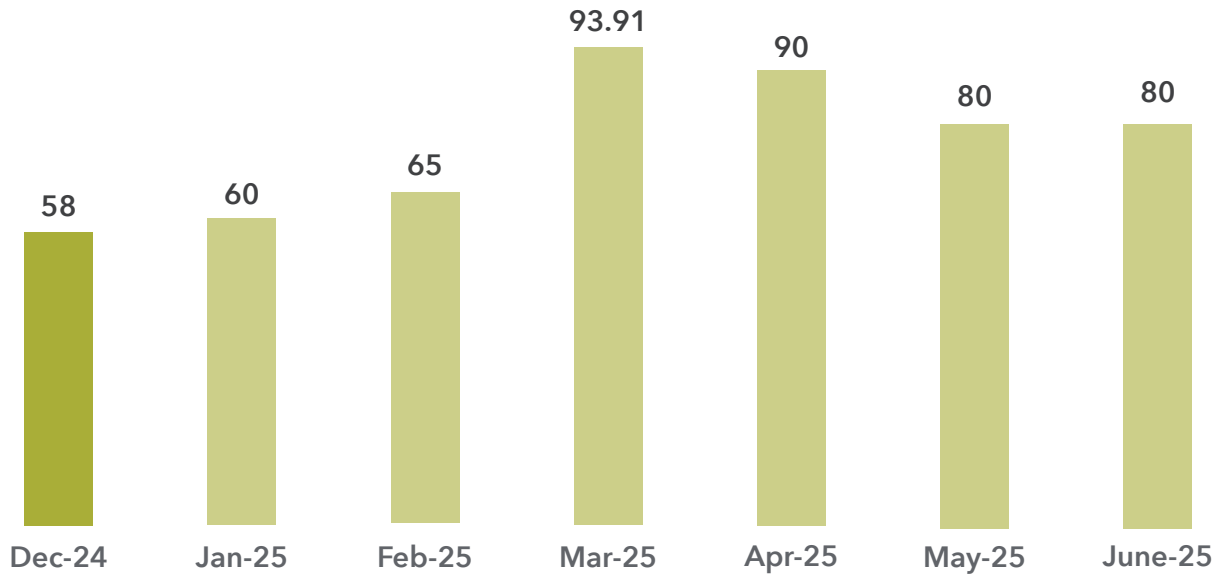
In terms of market capitalization based on USE performance, it can be estimated that MTN Uganda presently commands a market cap of $1.66 billion (UGX 6 trillion).

MTN Uganda declared a total full year dividend of UGX 22.6 per share for the year ended 31st December 2024, amounting to a total dividend payout of UGX 506 billion.

Airtel Uganda Limited

For Airtel Uganda, 2024 was its first full year of trading on the USE following its IPO in October 2023. Airtel opened the year with a share price of UGX 94 in January 2024 but experienced some volatility during the year, with a wide range of of UGX 58-95. These are prices below its IPO price.

Figure 36 Uganda's Share Price Trend (Dec 24 – June 25)



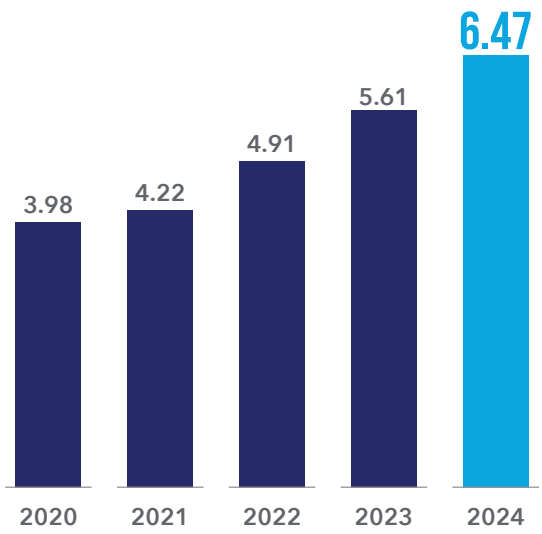
A final dividend of UGX 2.5 per share (UGX 100 billion) for the FY ended 31st December 2024 was recommended in early 2025, bringing the total dividend for the year to UGX 7.88 per Airtel Uganda Limited share.

Revenue

In the financial front, the market posted significant revenue growth, sustained investment and a shifting landscape of revenue distribution.

In terms of revenue, total revenue surged to UGX 6.47 trillion in 2024, representing a Compound Annual Growth Rate (CAGR) of approximately 10.2% over the last 5 years. Specifically, 2024 posted a 15.5% year on year growth from 2023 to 2024.

Figure 37 Gross Telecom Sector Revenue in UGX Trillion (2020 - 2024)



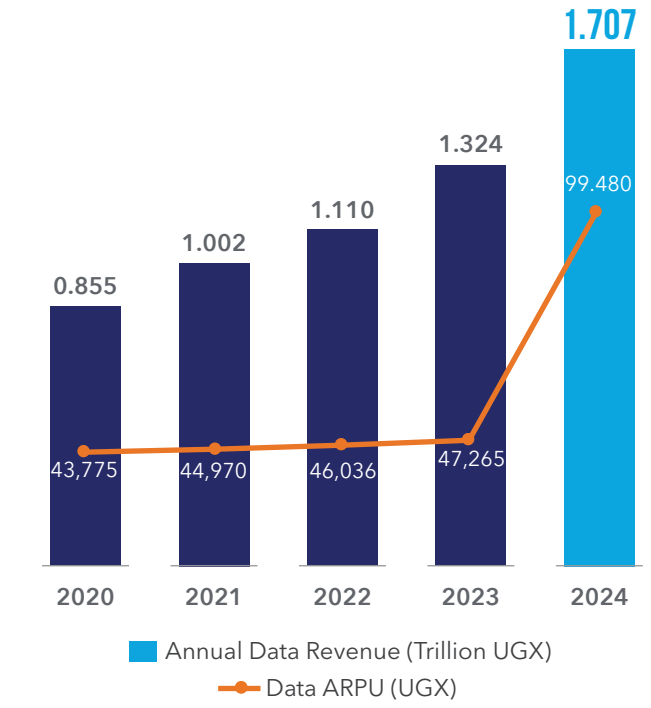
The drivers of this revenue performance have largely been growth in data consumption, increased service penetration, service diversification beyond traditional voice and a favorable demographic characterized by Uganda's young and growing population.

Revenue Distribution

Data Revenue

Operational data from the MNOs shows that the data segment has remained the undisputed growth engine of revenues, growing from UGX 655.7 billion in 2019 to UGX **1.077 trillion** in 2024, representing a CAGR of approximately 21% over the 5 years.

Figure 38 Annual Data Revenue per User in Uganda Shillings (2020 - 2024)

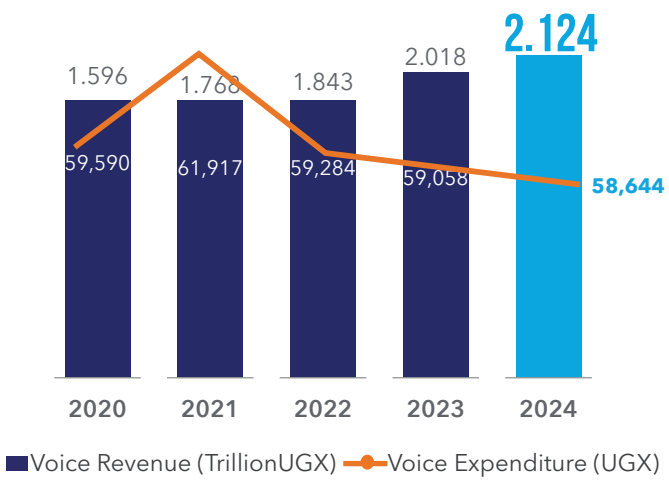


Data accounts for 26% of total revenue, becoming the most dynamic value chain in the sector. The sustained appetite for data is buttressed by increased smartphone penetration, social media and streaming services uptake and changes in the pricing of data bundles.

Voice Revenue

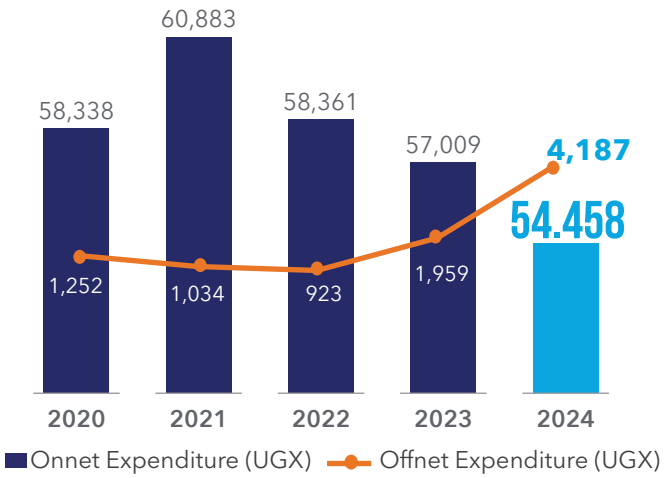
While voice revenue grew in absolute terms from UGX 1.5 trillion in 2019 to UGX 2.124 trillion in 2024, its CAGR is more modest at 7.7%. This is only a third of the data CAGR.

Figure 39 Annual Voice Revenue and Voice ARPU (2020 - 2024)



The growth, albeit comparatively small, is largely coming from resident demand, especially in rural areas, as well as new demand sparked by the bundling of voice minutes within network neutral voice bundles such as MTN's Freedom minutes and Airtel's Chillax.

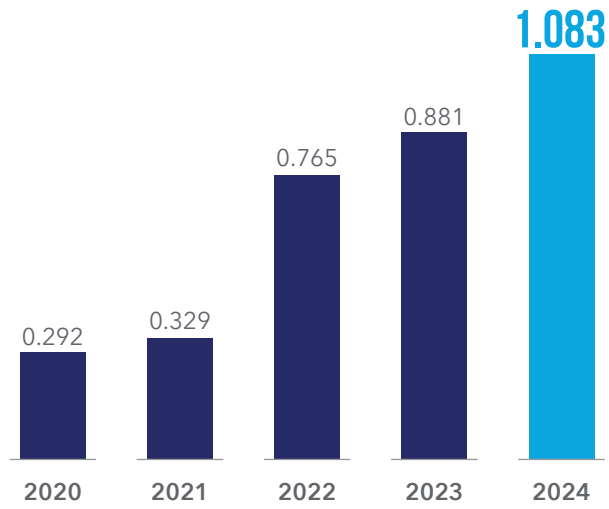
Figure 40 Onnet, Offnet Annual Voice Revenue per User in Uganda Shillings (2020 - 2024)



Tower Lease Revenue

The importance of tower lease revenue continues to grow as MNOs expand coverage in pursuit of commercial and regulatory targets. The revenue has grown from UGX 274.7 billion in 2019 to UGX 1.083 trillion in 2024. This represents a CAGR of approximately 31%, making it equal to the growth rates set in the data segment. This performance is largely on account of independent tower companies ATC and Towerco of Africa that control more than 90% of the tower portfolio in Uganda.

Figure 41 Annual Tower Lease Revenue in Trillion Uganda Shillings (2020 - 2024)



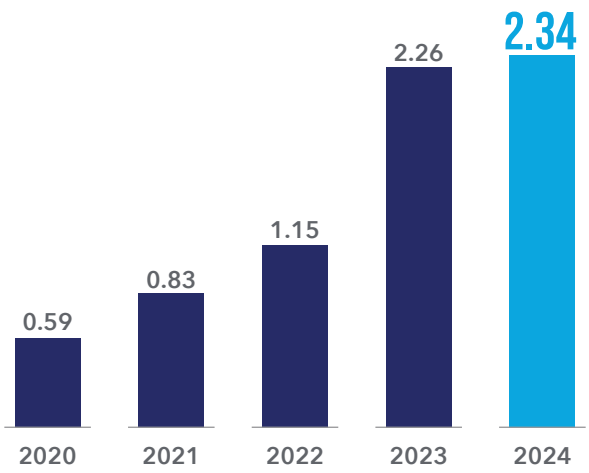
The growth in the tower lease landscape and revenue is specifically important because by extension, it implies that there is a falling upfront capex burden as MNOs opt for these models rather than large lumpsum investments in passive infrastructure. They only incur predictable OPEX in form of lease payments freeing up significant capital that can be redirected to customer acquisition, core network improvements, debt paydowns and innovation.

With a lower capital base and improved free cashflows, MNOs metrics such as Return on Capital employed and Return on Equity – ROE tend to improve, repositioning them as asset-light businesses attractive to investors.

Investment Trends

Investment in the sector has seen a phenomenal increase, reflecting operators' commitment to expanding and upgrading network infrastructure. From UGX 594.4 billion in 2019, annual investment has soared to UGX 2.339 trillion in 2024, presenting a remarkable CAGR of 31.5% over the last 5 years.

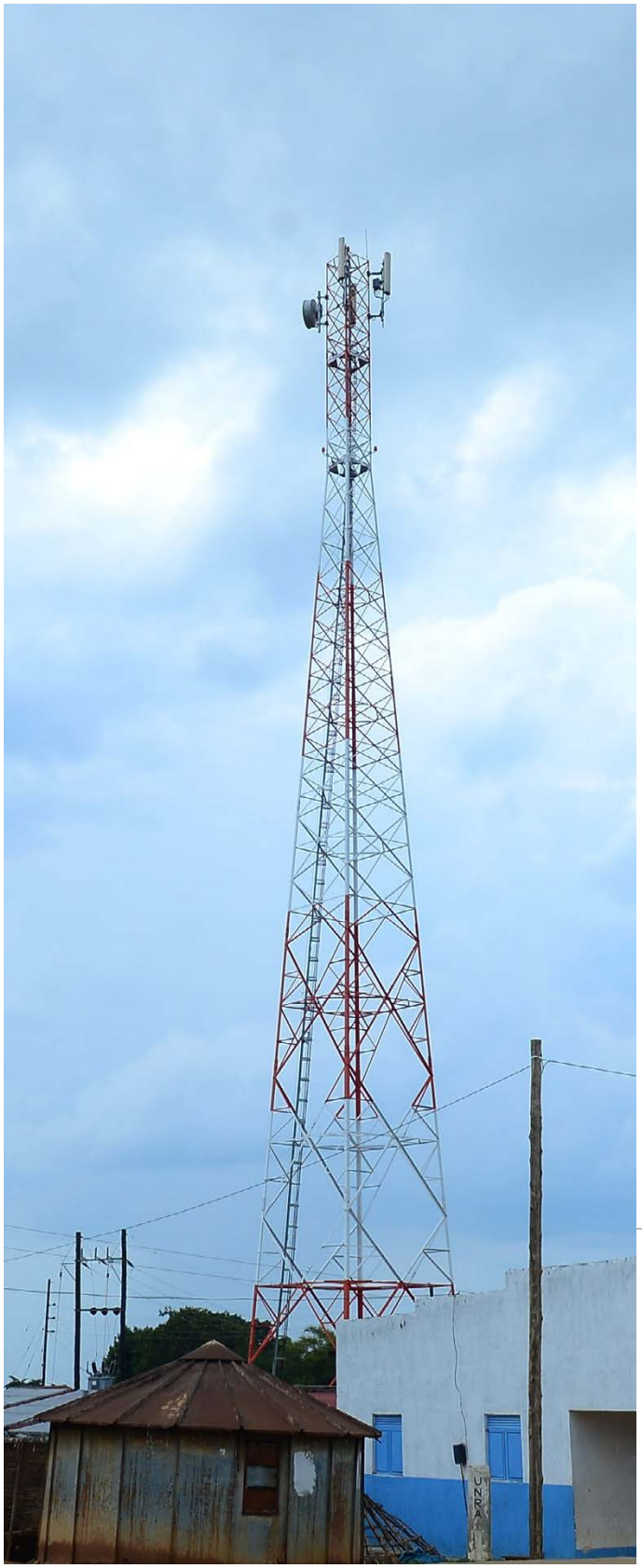
Figure 42 Telecom Sector Investment in Trillion Uganda Shillings (2020 - 2024)



This outstrips the growth CAGR by 3X, implying that the sector is in a heavy capex cycle with operators investing more money into building and expanding their networks than immediate growth revenue dictates. This indicator implies that the sector is future proofing networks rather than reacting to current revenue situations. There is investment for long term growth based on a bet on increased digital adoption.

Besides future proofing networks, this metric could also indicate stronger commitment to superior network competitiveness as well as a commitment to meet regulatory requirements as the two primary licensees near the 5-year anniversary of the new licensing regime.

This new investment has largely been absorbed in 4G/5G roll out (that comes with significant network densification), new investment in fiber optic roll-out, especially in backhaul to towers and core network improvements to service new last mile demand.



Telecom Sector Challenges

Telecom infrastructure forms the bedrock for all communication services nationwide, and achieving universal access remains a key objective. However, Uganda continues to face significant geographic disparities in mobile broadband infrastructure coverage. The current layout of our telecom networks, particularly those supporting 3G and above, remains heavily concentrated along major roads and within urban areas.

This uneven distribution directly contributes to Uganda's mobile access gap, which currently stands at 28%, meaning approximately 13 million Ugandans still live outside the footprint of a mobile broadband signal. Addressing this fundamental coverage deficit is critical to laying the groundwork for true digital inclusion, as these 13 million citizens are currently unable to access the transformative benefits of mobile internet, regardless of device affordability or digital literacy.

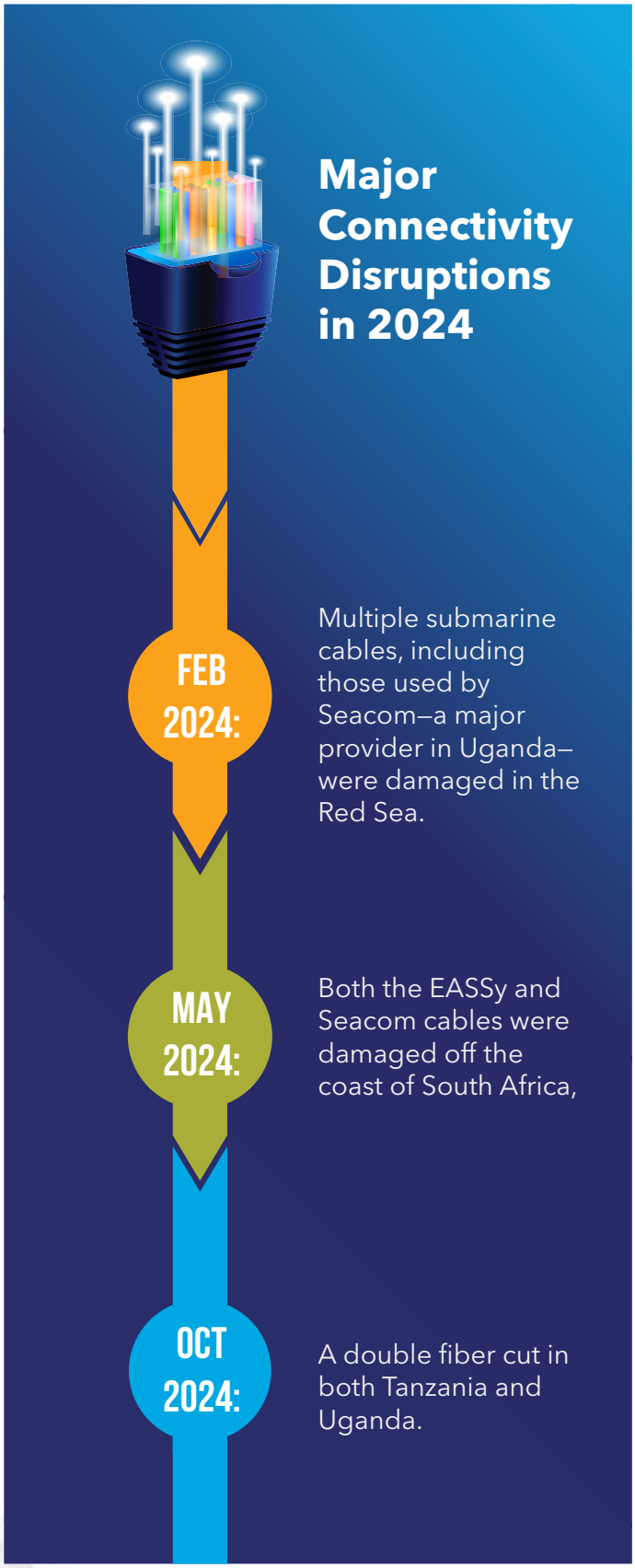
The uneven distribution is driven by several factors that hinder holistic country-wide coverage. These are explained below:

Vandalism

Vandalism and theft continue to threaten service reliability and infrastructure sustainability. In 2024, the sector reported losses exceeding $ 182,000 from theft of batteries, solar panels, and generators across 26 sites. These incidents lead to prolonged downtime, reduced service quality, and increased security and replacement costs.

In addition, Fiber optic cables are frequently damaged or stolen, often for resale. In 2024, the average cost of replacing vandalized fiber infrastructure was approximately $ 50,000 per incident, particularly in the central region where competition is most intense.

Such incidents negatively impact service reliability, increase operational costs, degrade consumer experience, and result in revenue losses for both telecom operators and the government.



Cross Sector Regulation

Telecommunications towers operate using radio frequencies (RF), which are also critical for aviation communication and navigation systems. The Uganda Civil Aviation Authority (CAA) has flagged RF interference from telecom towers, particularly in proximity to airports such as Entebbe and Soroti.

Aviation systems operate in internationally protected frequency bands, and overlapping or adjacent telecom signals can cause spurious emissions, risking aviation safety.

To mitigate this, CAA has designated zones where tower construction is restricted, directly affecting network coverage in those areas and hindering efforts to achieve national mobile coverage targets.

Uganda's Landlocked Position and International Connectivity Risks

Uganda's landlocked position necessitates routing international internet traffic through neighboring coastal countries, primarily via undersea fiber cables in Kenya through Malaba, facilitated by licensed operators.

In 2024, the country experienced several major disruptions due to damage to these submarine cables, which are critical for international connectivity:

01 **FEBRUARY 2024:**
Multiple submarine cables, including those used by Seacom—a major provider in Uganda—were damaged in the Red Sea. The incident affected internet services across East Africa.

02 **MAY 2024:**
Both the EASSy and Seacom cables were damaged off the coast of South Africa, likely due to a ship dragging its anchor, causing widespread connectivity issues in Uganda.

03 **OCTOBER 2024:**
A double fiber cut in both Tanzania and Uganda resulted in further internet traffic disruptions.

These incidents underscore the fragility of Uganda's reliance on a limited number of international gateways.

Infrastructure Sharing and the 'Poles Problem'

Uganda's National Broadband Policy (2018) promotes infrastructure sharing as a critical principle to reduce duplication and lower deployment costs for telecom services. While this principle is widely accepted, its practical implementation has created unforeseen challenges, particularly in densely populated urban centers such as Kampala.

The intense competition among Internet Service Providers (ISPs) and the attractive business proposition of connecting a large, growing customer base in the central region have led to a proliferation of network infrastructure. Rather than consistently utilizing shared underground ducting systems, many ISPs have opted for the seemingly faster and cheaper solution of installing low-cost wooden poles.

This preference for quick deployment is driven by economics and operational realities: it is significantly cheaper to put up a pole and roll out services, costing approximately $70 per pole. This contrasts sharply with the challenges of using underground ducts, which are regularly susceptible to cuts by city council authorities and other utility and infrastructure providers (such as water, transportation, and energy). Such accidental cuts lead to costly repairs, service disruptions, and prolonged downtime, making underground deployment less predictable and more expensive in the long run. The reliance on poles has resulted in a significant visual impact.

200K **estimated number of wooden poles in Kampala District**

Kampala alone is estimated to have over **200,000** wooden poles, creating extensive visual clutter and degrading the urban landscape, especially in major towns.

Right of Way and Land Access Constraints

Right-of-way (RoW) issues have emerged as a significant obstacle to fiber deployment. Property owners across the country have delayed or obstructed infrastructure installations due to compensation demands, land disputes, or cultural beliefs regarding the effects of electromagnetic radiation.

These barriers have hampered the installation, maintenance, and upgrading of fiber networks, particularly in rural and peri-urban areas.

Uganda's 'Poles Problem'

Utility and Communication services providers deploy multiple wooden poles along Spring road Bugolobi.

Navigating Telecom Challenges

The Digital Transformation Programme of NDP IV

Over the last three National Development Plans (NDPs), Uganda has focused on creating a foundation for economic growth and socio-economic transformation. NDP I (2010/11–2014/15) aimed at achieving a rapid and sustainable economy through infrastructure development and private sector-led growth. NDP II (2015/16–2019/20) built on this, with a focus on strengthening fundamentals for transformative growth, while NDP III (2020/21–2024/25) shifted towards a programmatic approach to accelerate the country's transition to a middle-income status. While these plans had some ICT components, NDP IV elevates the role of ICTs by embedding them as a central driver of the entire digital transformation agenda.

NDP IV's Digital Transformation Programme is designed to expand the importance of ICTs from a supportive role to a primary enabler of efficiency and competitiveness across all sectors. This programme recognizes that digital technologies are critical for improving government service delivery and enhancing the effectiveness of key initiatives such as the Parish Development Model (PDM) and Emyooga, which use digital platforms for beneficiary profiling, fund disbursement, and monitoring.

By leveraging technology, the government aims to close the digital inclusion gaps in access and usage, addressing challenges such as low end-user penetration, limited digital literacy, cybersecurity risks, and the high cost of digital devices.

To address these digital inclusion gaps, NDP IV has set specific, measurable targets for the period from FY2024/25 to FY2029/30:

1. Increased satisfaction with e-government services: The goal is to raise the proportion of the population satisfied with these services from 22.2% in FY2023/24 to 30%.
2. Increased internet usage: The plan aims to more than double the proportion of the population using the internet from 20% in FY2023/24 to 45%.
3. Enhanced digital skills: The target is to increase the proportion of the population that is digitally skilled from 26% in FY2023/24 to 36%.
4. Improved cybersecurity: Uganda aims to improve its national cybersecurity posture from 50.65% in FY2023/24 to 60.65%.
5. Improved data protection compliance: The target is to raise compliance with the Data Protection and Privacy Act from 6% in FY2023/24 to 30%.

Development of Alternative Fiber Routes

To enhance network resilience, Uganda is exploring the adoption of a ring architecture for fiber infrastructure. This design enables automatic rerouting of data traffic in the event of cable cuts or equipment failure, thereby reducing downtime.

The Government of Uganda is working on alternative routing strategies, including pathways through Tanzania and integration with the East African Crude Oil Pipeline Project (EACOP). These redundancies will help safeguard against single points of failure in the international connectivity chain.

> **"The Government of Uganda is working on alternative routing strategies.. that will help safeguard against single points of failure in the international connectivity chain."**

Focused Investment in Northern and North-Eastern Regions

The government is intensifying efforts to close the infrastructure gap in underserved areas. Phase V of the National Backbone Infrastructure (NBI) project will expand broadband access to remote parts of the North and North-Eastern regions.
Key highlights of Phase V in the NDP IV will include:

01 Installation of 5,845 kilometers of additional optical fiber.

02 Coverage of 63 districts, primarily in the northern regions.

03 Last-mile connectivity to over 2,800 sites, including schools, hospitals, government institutions, and parishes.

This expansion aims to promote inclusive digital development and bridge regional disparities.

Enabling Satellite Broadband Services

While terrestrial networks remain central to Uganda's broadband strategy, the country is also preparing for the entry of satellite broadband providers as a complementary solution, especially for hard-to-reach areas. Major global players such as Amazon Kuiper and SpaceX's Starlink are already operational in neighboring countries, including Rwanda, Kenya, and South Sudan.

To accommodate this emerging technology, the UCC has updated its Satellite Licensing Framework and is finalizing a Satellite Landing Rights Authorization. This move will allow new entrants into Uganda's broadband market, improving service coverage and enhancing network redundancy.

UCC Launches Telecom Market Definition & Assessment Study

In October 2024, UCC launched a study on Uganda's telecommunications market definition and assessment. It was commissioned to improve industry competitiveness and identify barriers to competition. During a UCC meeting in Bugolobi, telecommunication operators were introduced to the consultancy team, Tilil Technologies Limited and Acacia Economics (PTY) Limited, who will evaluate the competition, market participants, and services.

Regulatory Stewardship

UCC has continued positioning itself as a captain of industry, steering the sector through a period of continuing technological convergence and digital transformation. UCC's core objective of fostering innovation and competition, safeguarding consumer interests and ensuring universal access to ICTs aligned to global best practices and regional commitments remains firm. This chapter discusses some of the regulatory highlights in 2024.

Enhancing industry licensing and oversight

In the second quarter of 2024, the Converged Licensing Framework was updated to make license applications simpler, clearly define what each type of license allows, and support the entry of new business models and specialized service providers. These new processes apply to all licensed companies and are outlined in Annex 1 of Licensed entities in the Ugandan ICT sector.

Strategic Spectrum Management

Spectrum management remains a cornerstone of the technologically evolving communications marketplace. The UCC interventions during the year largely focused on strategic allocation and optimization of this resource. Key interventions included:

Refarming of existing spectrum to support 4G and 5G densification

Implementation of forward-looking plans for the deployment of mid band spectrum in the 2.6 GHz and 3.5GHz to support 5G roll out.

Public consultations on Uganda's spectrum specifically for low band spectrum such as the 700MHz for rural broadband coverage by UCC.

Worth noting is the fact that most of the spectrum management initiatives were largely guided by the World Radiocommunication Conference (WRC) as well as collaborative initiatives from the East African Communications Organisation (EACO).

Numbering Resource Management

Interventions in the realm of numbering resource management included the numbering resource utilization audit by the UCC in Q3 2024. To, among others, promote efficient numbering utilization as well as combat fraudulent number misuse, operators found with unutilized numbering blocks had to forfeit them.

UCC plays a key role in promoting equal access to ICT services by managing the country's National numbering resources; these include phone numbers, short codes, toll-free lines, and emergency service numbers.

Uganda's communication numbering resources are managed by UCC in line with the ITU-T standards. The UCC maintains a structured National Numbering Plan, which allocates specific number ranges for different telecommunication services and operators. For example, fixed telephony and mobile telephony services are assigned distinct blocks, with each operator receiving dedicated number ranges to ensure clarity, avoid duplication, and facilitate efficient routing of calls and services.

The numbering plan specifies, among others:

01 The maximum number of digits of the National (Significant) Number (e.g. 777 111 999), used to select the destination subscriber (excluding the country code +256).

02 Unique numbers for each operator and service type.

03 Updates to ensure transparency and adapt to market changes or new entrants.

This structured allocation and ongoing management

help prevent number exhaustion, ensure fair access to numbering resources for new and existing operators, and support the introduction of new services (such as mobile money and emergency response services).

Efficient numbering management is crucial for:

01 Market Growth: It enables fair competition among telecom operators by providing equitable access to numbering resources, supporting market entry and innovation.

02 Service Reliability: Clear and non-overlapping number assignments reduce call routing errors and service disruptions.

03 Support for Digital Services: Numbering resources underpin a range of digital services, including mobile money, e-government, and emergency services, which are vital for economic development and social inclusion.

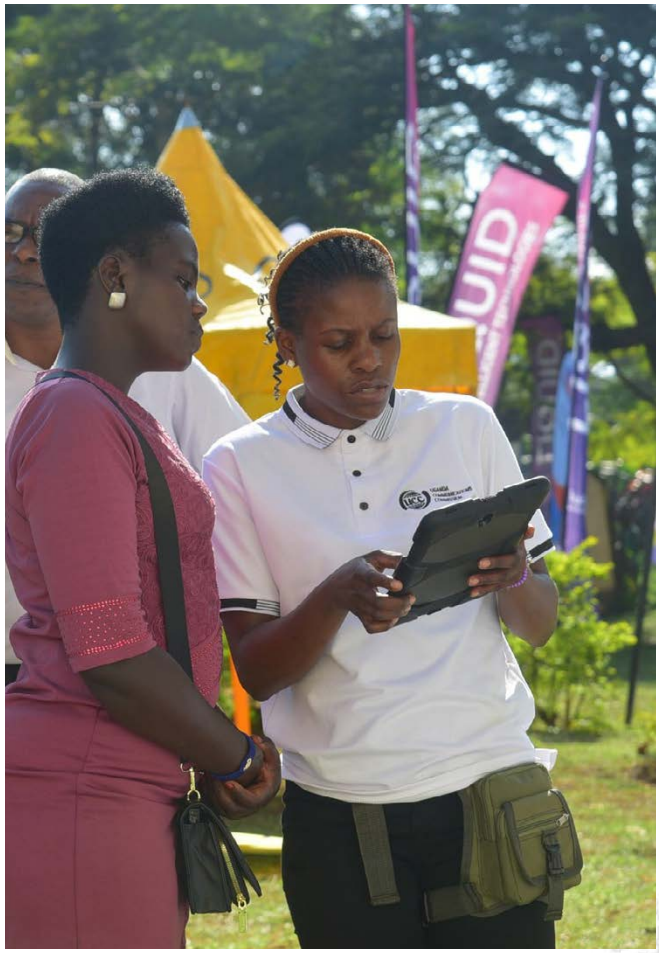
Through fair and efficient allocation of these resources, UCC helps ensure that all Ugandans, including those in remote and underserved areas, can access vital communication services. By making it easier for telecom operators to expand services using well-managed numbers and codes, UCC supports the delivery of different services, including but not limited to Mobile Financial Services, customer care, health information, and emergency response—services that are essential in closing the digital divide. This careful management fosters innovation, service reliability, and affordability, giving more Ugandans the opportunity to participate in the digital economy.

Ultimately, UCC's efforts in numbering management contribute to making ICT services more inclusive, helping to bridge the access gap and bring digital opportunities closer to every Ugandan. In the Table below is a summary of the subscriber number blocks assigned in the year 2024.

Table 5 Summary of the subscriber number blocks assigned in the year 2024

Operator	Subscriber Number Block	Type
Airtel	0745,0746,0747	Mobile Numbers
MTN	0766, 0767, 0768	
Tangerine/ Lycamobile	0727	

"UCC plays a key role in promoting equal access to ICT services by managing the country's National numbering resources; these include phone numbers, short codes, toll-free lines, and emergency service numbers."



Winning against Infrastructure Prejudices

As Uganda deepens its investment in digital transformation, the rollout of telecommunications infrastructure, especially base stations and towers has encountered growing resistance from some communities. A leading cause of this opposition is the concern over potential health effects from exposure to radiofrequency electromagnetic fields (RF EMF) emitted by such infrastructure.

While these fears are not unique to Uganda, they often stem from misinformation, limited access to factual resources, and the influence of speculative or unverified studies. This creates a significant barrier to infrastructure deployment, which in turn delays access to essential communication services in affected areas.

To address these concerns, the Commission took a multi-pronged approach that combines regulation, stakeholder engagement, and public education:

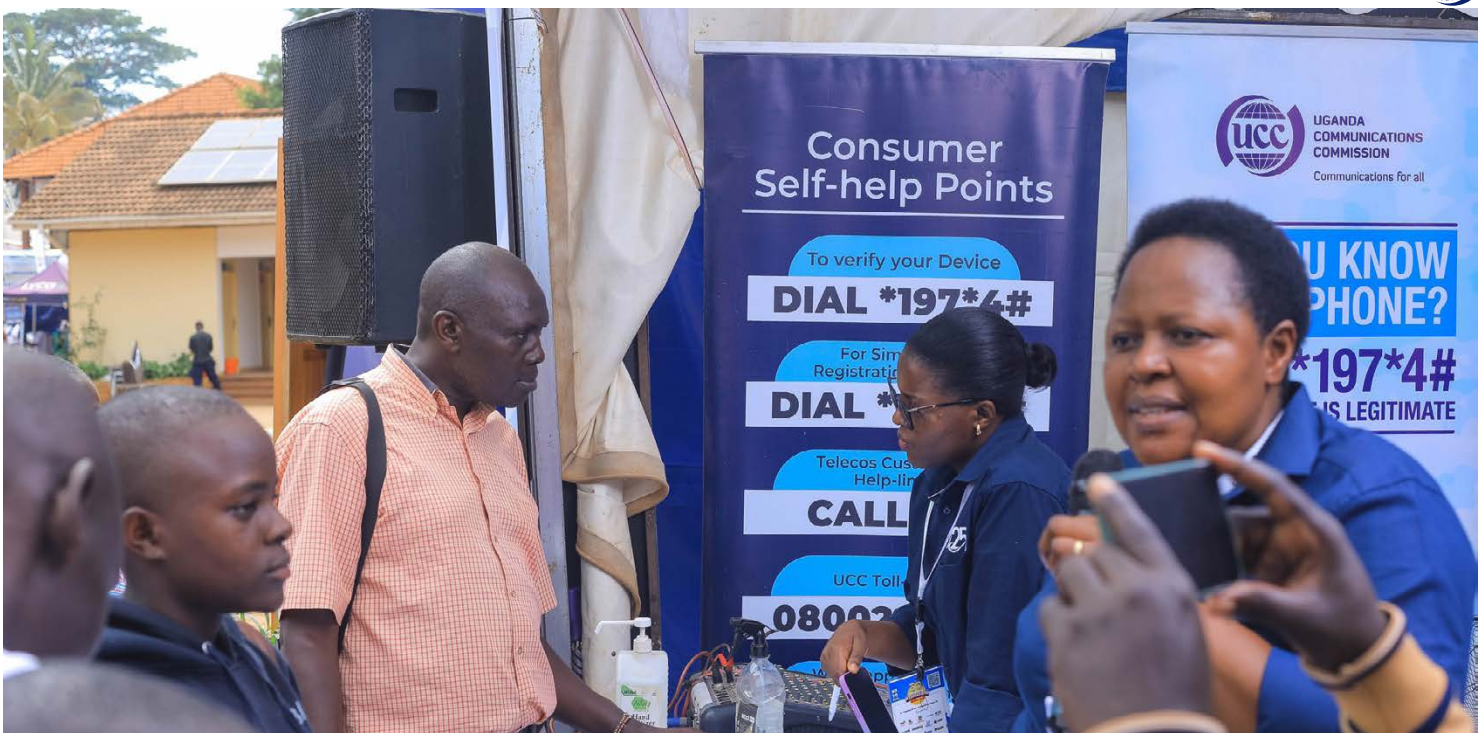
01 Commissioned the development of a National RF EMF Compliance Framework for RF EMF exposure assessment.

02 Undertook targeted public sensitisation and community engagements in partnership with telecom operators, infrastructure companies and other statutory authorities such as NEMA and KCCA to further demystify health needs and build public confidence around telecom infrastructure deployment.

Fostering a level playing field

UCC completed a significant market power assessment across the telecommunications value chain. The assessment included market identification as well as assessed individual and collective market power positions. This assessment is a foundation of input for competitive and regulatory restraints against potential abusive conducts across the value chains.

Significant market power assessments largely drew from the foundational Small but Significant Non-Transitionary Increase in Price (SSNIP) methodology using jurisdictions such as the European Union, Office of Communications - OFCOM, and the US's Federal Communications Commission.



Consumer Protection

The Commission (UCC) continued to champion its consumer protection agenda in 2024, shifting its strategy to be more proactive and people centered.

The Commission's efforts were built on two pillars: consumer education and awareness, and complaints handling. By moving beyond traditional regulatory methods, the Commission empowered citizens across the country to use digital services with confidence. This new approach aimed to build trust and ensure digital inclusion for all.

Consumer Protection initiatives

Education and Awareness

In 2024, the UCC conducted several major initiatives to empower consumers and increase awareness of their rights and digital safety. These efforts aimed to foster trust and confidence in the digital economy.

Commemoration of the Worlds Consumer Rights Day

The UCC commemorated World Consumer Rights Day (WCRD) 2024 with the theme "Fair and Responsible Artificial Intelligence (AI) for Consumers." Held from March 11th to 15th in Mbarara and the Greater Ankole sub-region, the event reached nearly one million people. WCRD 2024 provided practical support and education to help communities safely navigate the digital world

Activities included consumer help camps that provided real-time complaint resolution, roadshows that brought ICT education to rural areas, and a Youth in ICT Symposium that engaged over 300 students. The initiative also utilized radio and social media to allow thousands to access consumer-related content and voice their concerns.

This effort successfully expanded ICT knowledge, empowered consumers to advocate for their rights, and encouraged collaboration among multiple stakeholders, including operators, academia, and the media.

Communications Consumer Parliament 14th Edition

The 14th Communications Consumer Parliament (CCP-14) was a key initiative that reached over 1.3 million people in the Kigezi sub-region from June 12th to 20th. The campaign's theme, "Promoting Impactful ICTs," focused on informing and empowering consumers, particularly SMEs and women-led businesses, with the practical knowledge to demand improved digital services.

Activities, including road shows, radio talk shows, and service clinics provided people with information on their rights and avenues for seeking redress. The initiative was highly effective in its direct impact, with help camps and service clinics to resolve service-related complaints for 2,000 individuals on the spot.

CCP-14 went beyond raising awareness to active empowerment, fulfilling the UCC's regulatory mandate and helping to shape practical recommendations on pricing, quality of service, and responsible social media use.

Regional Consumer Dialogues and Town Hall meetings

Through Regional Dialogues and Town Halls, UCC extended its outreach to Kiboga, Tororo, Kotido, and Kitgum from August to September 2024. These dialogues addressed localized challenges such as poor network coverage, fraud and digital literacy gaps. Over 8,000 consumers participated in the dialogues with impressive turnout in remote areas in the above-named districts.

A key takeaway from these sessions was the urgent need for targeted digital literacy programs, as a widespread lack of understanding of communication products was evident. These engagements transformed passive consumers into informed advocates who began to demand better quality and accountability from service providers. The dialogues further bridged the gap between consumers, service providers, and regulators, sparking real, tangible change in people's lives.

Content Promotion at the 2024 Uganda International Trade Fair

From October 3–10, 2024, the Commission made a significant impact at the 30th Annual Uganda International Trade Fair themed "Promoting Local Content." The UCC's booth became a dynamic platform that empowered consumers and celebrated the country's film industry.

Through daily 3D film screenings, UCC brought local stories to life, captivating youth and families who experienced Ugandan films in a cinematic format for the first time. These screenings not only sparked a sense of cultural pride but also inspired creativity through direct interactions with local actors and directors.

Simultaneously, UCC engaged directly with the public, demystifying consumer rights and listening to their challenges. This face-to-face approach gave people the knowledge to make informed decisions and stand up for their rights. UCC's participation fostered stronger community support for Ugandan films, provided valuable insights for future regulatory actions, and earned the Commission the prestigious Best Sector Exhibitor Award.

Complaints Management

Operator Complaints Management (First level complaints)

UCC receives and analyses monthly consumer complaint reports from the telecom operators, and analysis of these operator complaint reports inform appropriate regulatory interventions. Below are the trends from the 2024 complaint reports.

930K

recorded customer complaints were registered with operatorss

A total of **933,804** recorded customer complaints were registered out of a growing subscriber base that rose from 37.46M in Q1 to 41.79M in Q4.

The annual average complaints-to-subscriber ratio stood around 0.6%, but with significant quarter-to-quarter variation driven by subscription growth, consumer awareness campaigns, and seasonal service demands.

Airtel consistently recorded the highest complaint volumes, while Utel had the highest complaints-to-subscriber ratio each quarter. MTN maintained the lowest complaint ratio (~0.1% across the year).

UCC hosted a Town Hall meeting on 29th April 2024 at the Hotel Africana. The meeting was in response to growing concerns from consumers about data depletion; 'data pricing, usage and bundle offers.'. The Town Hall meeting titled '*Internet Data-Consumer Concerns*,' was attended by service providers (telecom and internet) Consumer Advocacy Organizations, Regulatory authority representatives, affected customers, technical experts, the academia, and media.

Operator Performance

By complaint volume (annual share)

01 Airtel dominated every quarter – between 55% (Q1) and 86% (Q3) of the total number of complaints.

02 MTN had consistently low volumes (~5–15%), lowest complaint ratios.

03 Tangerine (Lycamobile) had steady mid-range share (8–24%), high complaint ratios (~5%).

04 UTCL had the fewest absolute complaints but extreme ratios (38–55%).

Demographics

The dominant complaint age group in 2024 was 20–40 years (~67% of all complaints each quarter).

The gender of complainants was male in the early year, but dominance shifted mid-year to female majority.

- Q1: 54.8% male, 40.9% female.
- Q4: 51.7% female, 47.2% male.
- Unassigned demographic data remains a compliance gap.

Resolution Times

Majority of the complaints in 2024 were resolved within 24 hours.

- Lowest: 90.3% (Q2)
- Highest: 96.2% (Q3)
- Delays (>30 days) mostly tied to fraud cases (Airtel exclusively reported fraud complaints).

Incident Channels

Phone calls dominated (98–99% of all complaints), with notable minimal use of email, walk-ins, or social media, SMS & letters.

Complaints Management Performance by the MNOs

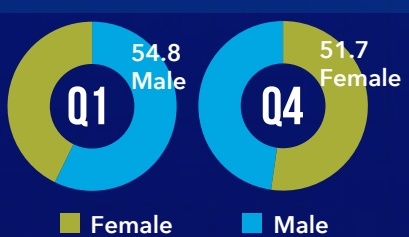
2024 Quarter (Jan - Dec)	Subscriber Base (M)	Complaints	% of Subs complaining	Observations
Q1	37.46	117,979	0.31%	Stable volumes, Accounts complaints dominated (52.5%).
Q2	38.56	111,107	0.29%	Complaints dropped; QoS complaints surged (71.4%).
Q3	39.95	358.168	0.90%	Sharp spike due to awareness drives & more subs; Data/Internet issues overtook QoS.
Q4	41.79	346,550	0.83%	Slight decline vs Q3; service improvements credited.

Complaint Categories - Key Shifts

2024	CATEGORY	%	
Q1	Account (personal account related issues)	52.2%	High account-related disputes, fraud in 2nd place at 8.9%.
Q2	Quality of Service	71.4%	Data & Internet fell to 13.6%.
Q3	Data & Internet	45.4%	QoS closes behind at 39.9%; spike in Airtel fraud cases (6.9%).
Q4	Quality of Service	46.0%	Accounts second (39.6%), fraud at 6.4%.

Demographics

20-40 years Dominant



Complaint Categories - Key Shifts

24 Resolution Time

Key Observations

01 Utel's complaint ratio remained persistently high, signaling ongoing service delivery problems.

02 Airtel consistently received the highest volume of complaints, likely due to its large customer base and related pressures on service quality and customer support.

03 Complaint trends shifted throughout the year: starting with account issues (Q1), moving to Quality of Service (QoS) and data problems, and ending with QoS concerns (Q4).Fraud complaints were a steady, recurring issue specific to Airtel.

04 

A temporary surge in complaints during Q3 was a direct result of successful consumer awareness campaigns.

Analysis of Telecommunication Operator Complaints to the Commission (Second level complaints)

The UCC serves as the second level of complaints handling for consumers who are not satisfied with the outcome of their initial engagement with their service provider.

In 2024, the UCC achieved a 99% resolution rate for complaints that were escalated to the Commission. The primary way consumers reached out to UCC was through phone calls, which accounted for 66% of all complaints, followed by outreaches, which made up 21% of the total complaints received.

The three highest categories of complaints received by the UCC in 2024 were:

01 Personal account issues (KYC, top-up issues, billing issues, mobile financial services, VAS/Campaigns/Promotions) made up the largest category at 37%.

02 Broadcasting concerns were the second-highest category, accounting for 18% of the complaints.

03 Fraud was the third-highest category, at 15%.

These statistics highlight the specific areas where consumers experienced the most significant problems with their service providers, prompting them to seek intervention from the UCC.

Personal Account Issues (37%)

Broadcasting concerns (18%)

Fraud (15%)

In 2024, UCC received complaints primarily about personal account issues at 37%, followed by broadcasting concerns at 18%, and fraud at 15%

Reaching all Age Groups

A student visits the UCC stall at the Uganda International Trade Fair (UGITF), held from 2nd to 10th October 2024. This annual event is organised by the Uganda Manufacturers Association (UMA). Uganda Communications Commission holds consumer awareness camps at the UGITF annually to educate consumers on their rights.

POSTAL AND COURIER

The Postal and Courier sector serves as the essential physical backbone of the communications and logistics infrastructure, enabling the collection and delivery of physical items for citizens, businesses, and governments globally.

Postal and Courier Snapshot

Letters and Parcels

Parcels

13,179

12,713

Domestic Registered Letters

12,841

10,731

Registered Letters

20,177

16,295

Expedited Mail Service

Domestic Expedited Mail Service Traffic

41,723

25,680

International EMS Incoming Traffic

9,817

8,421

International EMS Outgoing Traffic

7,918

6,302

Courier

Domestic Courier Traffic

35,639

Weight of Inbound Items

506,205

Weight of Outbound Items

204,857

Revenues

Revenue from Domestic Items

4.8 B

Revenue from International items

8.5 B

2024 2023

Post And Courier Services

Post and Courier Infrastructure

Over the last two decades, the global postal and courier industry has experienced a structural shift. E-commerce has overtaken traditional correspondence, making parcels the primary revenue source in most countries. In 2021, global postal revenue rose to €465.6 billion, with parcel volumes growing by 17% on average, and parcels accounting for most of the revenue for a fifth of postal operators (International Postal Corporation; 2024). Investment in automated sorting hubs, smart lockers, and integrated customs-clearance facilities has enhanced capacity. Countries are implementing geolocation-based addressing to improve last-mile delivery efficiency. Global operators are integrating electric fleets, bicycle couriers, and sustainable packaging into their infrastructure strategies. Regional postal alliances and shared logistics centres enable smaller markets to plug into global networks efficiently.

Order Fulfillment Centers

Order fulfilment centres are becoming an essential part of Uganda's e-commerce and delivery network. These facilities store goods, manage inventory, package orders, and arrange delivery to customers. While such services were once mainly offered by postal and courier companies, they are now also provided by technology-driven logistics firms, cross-border shipping companies, and specialised third-party logistics providers (3PLs).

Under Section 33 of the Uganda Communications Act (2013), any business that collects, processes, and delivers postal items such as parcels must have a postal or courier licence. This means fulfilment centres that handle these activities are legally part of the postal/courier sector.

For licensed postal and courier operators, fulfilment centres present new opportunities. They can receive and sort customer orders, prepare them for shipping, and complete last-mile delivery, the final step of getting an item from a warehouse to a customer's door.

Key players in Uganda's fulfilment and delivery ecosystem include Jumia Logistics, which operates a 1,000 m² warehouse in Kampala and multiple pick-up stations; Glovo Uganda, offering both food delivery and parcel services; SafeBoda, providing motorbike-based parcel delivery; CourieMate and Boxleo Courier, which handle local deliveries and cross-border shipping; and Posta Uganda, which runs over 300 post offices nationwide, many serving as parcel pick-up points.

Fleet

E-commerce growth in Uganda is driving significant improvements in delivery fleets. Companies such as Jumia Uganda, SafeBoda Express and Glovo rely heavily on motorcycles ("boda-bodas") for fast urban deliveries, while larger private courier firms such as DHL Express Uganda, Aramex and Posta Uganda are expanding their fleets with vans and trucks to support bulk and upcountry shipments.

Despite this progress, much of Uganda's delivery ecosystem remains informal. As of early 2025, the Commission reports 43 licensed courier companies, a steady rise from just 17 a few years ago, reflecting growing formal investment in the sector. However, an estimated 60% of last-mile delivery providers still operate without licenses, relying on buses, commuter taxis, and boda-bodas to transport goods, particularly in urban centers and rural trading routes. While these informal operators play a critical role in reaching underserved areas, their unregulated status raises challenges around service quality, consumer protection, and data security, and places them outside the tax and compliance framework that licensed operators must follow.

Because much of the sector relies on these unregulated and non-standard fleets, service can be inconsistent, especially for online orders that need reliable, on-time delivery. Strengthening regulations and investing in professional fleets will help improve service quality and support continued growth in e-commerce.

"Under Section 33 of the Uganda Communications Act (2013), any business that collects, processes, and delivers postal items such as parcels must have a postal or courier licence. This means fulfilment centres that handle these activities are legally part of the postal/courier sector."

E-Mobility

The adoption of electric mobility (e-mobility) is transforming Uganda's postal and courier sector. E-mobility refers to the use of electric vehicles (EVs), including motorcycles, bicycles, and vans that run on electricity rather than petrol or diesel. Globally, leading courier companies are embracing this shift to make the "last mile" of delivery greener, more efficient, and sustainable.

E-mobility is poised to revolutionize Uganda's postal and courier sector by offering cost-effective, environmentally friendly, and efficient transportation solutions. With continued government support, private sector investment, and the development of necessary infrastructure, Uganda can lead the way in sustainable transportation in Africa.

Major international logistics firms are actively electrifying their delivery fleets. According to DHL , the company aims for 60% of its last-mile delivery vehicles to be electric by 2030, while FedEx has committed to achieving carbon neutrality across all operations by 2040. A significant pillar of these commitments is the electrification of pickup and last-mile delivery vehicles.

In Uganda, the government continues to support the National Electric Mobility Strategy of 2023, which promotes the adoption of environmentally friendly vehicles for ride-hailing and courier services. This policy encourages companies such as SafeBoda, Bolt, and E-Bee to integrate electric motorcycles and vehicles into their delivery fleets.

As of 2024, Uganda had made significant strides in adopting e-mobility. The government supported the deployment of over 1,600 electric vehicles, with more than 2,000 EVs currently in operation as part of its National E-Mobility Strategy. The sector has seen growth in the use of electric motorcycles and vans for courier services, particularly in urban areas like Kampala.

E-mobility offers several advantages for courier operations, including lower fuel and maintenance costs, zero tailpipe emissions that reduce pollution and noise, enhanced company reputation appealing to sustainability-conscious consumers, and improved operational efficiency as electric motorcycles and vans can navigate congested urban areas and reach remote locations effectively.

Despite the benefits, several obstacles remain such as;

- Limited charging infrastructure beyond Kampala.
- New/emerging battery technology with limited range on battery lifespan.
- Lack of policy incentives that can fully encourage EV adoption.

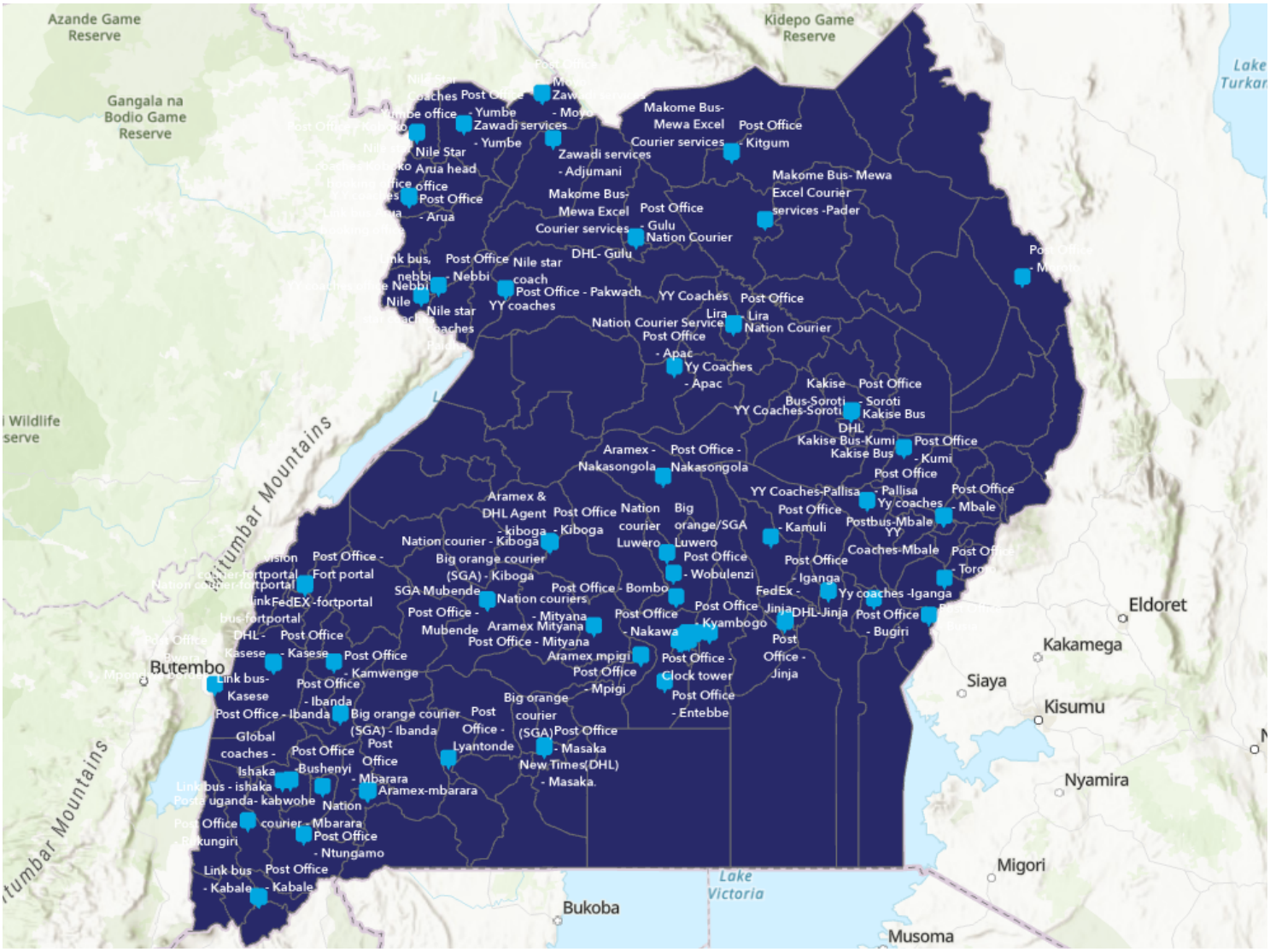
Post and Courier Coverage

Uganda's postal and courier sector demonstrates a growing national presence, combining the extensive network of Posta Uganda with licensed domestic courier operators. Early in 2024, the Uganda Communications Commission (UCC) established 156 drop-off and pick-up points across 51 districts, improving accessibility to postal and courier services nationwide.

The sector shows a robust combination of formal networks, licensed operators, and informal delivery channels, working together to extend services across the country. While urban centres are well-served, continued investment in infrastructure, licensing, and technology is essential to improve rural coverage, enhance service reliability, and support the growing e-commerce sector.

Posta Uganda, the National Postal Service, operates through over 98 post offices and is supported by central sorting hubs in Kampala, code named UGKLAA for letters and UGKLAC for EMS packages, which serve as key logistical nodes coordinating the efficient movement of mail across the country. This makes Posta Uganda the most extensive postal network in Uganda, providing both urban and regional coverage.

Figure 42 Post and Courier Service Agent Footprint



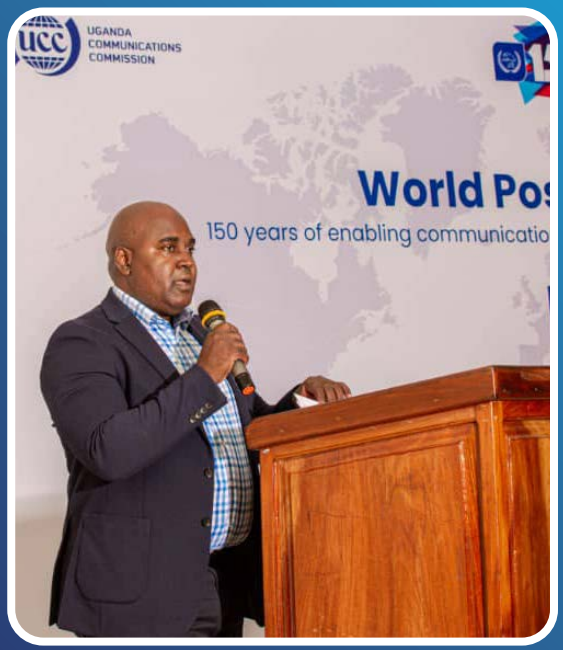
Several domestic courier companies complement Posta Uganda's network by expanding into major urban and regional centres. For example, Nation Couriers, headquartered in Kampala, operates over 140 agent locations in towns such as Jinja, Mbarara, Gulu, and Mbale, offering last-mile delivery and same-day services, while Skynet Worldwide Express Uganda maintains offices in Kampala, Entebbe, and regional hubs, serving both domestic and international courier demands.

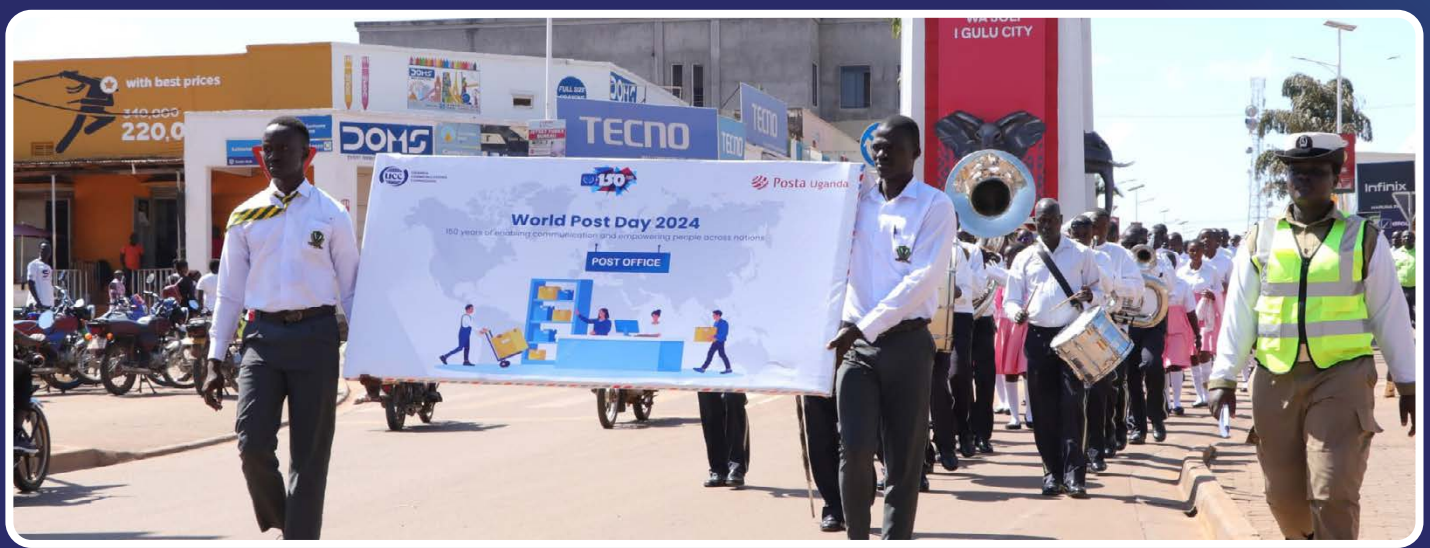
Other domestic operators leverage a mix of physical offices, mobile points, and boda-boda networks to facilitate deliveries in urban and rural areas. This combination of networks helps bridge the gap between rural and urban communities, enhancing both reliability and reach.

Despite the growth of licensed operators, a significant portion of delivery services remains informal. Approximately 60% of courier providers operate without formal licensing, using buses, taxis, and motorcycles to move goods. While these informal services extend coverage to areas that formal operators may not reach, they pose challenges in ensuring service consistency and regulatory compliance.

World Post Day 2024

UCC, in partnership with other stakeholders, including Uganda Post Limited, celebrated World Post Day in Gulu District from October 7th to 10th, 2024. The event featured various activities, including radio shows, school visits, presentations, and a public blood donation drive, all highlighting the importance of postal services in connecting people and communities.





Post and Courier Usage

Uganda Post Limited (The National Designated Operator)

Uganda Post Ltd (commonly known as Posta Uganda) is the state-owned company designated as the Designated Postal Operator (NPO). Established following the restructuring of the communications sector in the late 1990s, Uganda Post Ltd is mandated to provide Universal Postal Services (UPS) across the country.

This means ensuring that every Ugandan, regardless of location or income level, has access to reliable and affordable postal and related services. As part of the country's communications and logistics infrastructure, Uganda Post Ltd offers a wide range of services tailored to the needs of individuals, businesses, government agencies, and the growing e-commerce sector.

Uganda Post Ltd (UPL) organizes its domestic postal services to meet diverse customer needs, with offerings segmented based on service features, delivery speed, and geographic coverage. This structured approach enables the company to serve both urban and rural populations effectively while supporting businesses and e-commerce growth.

Ordinary Letters
Traditional Mail

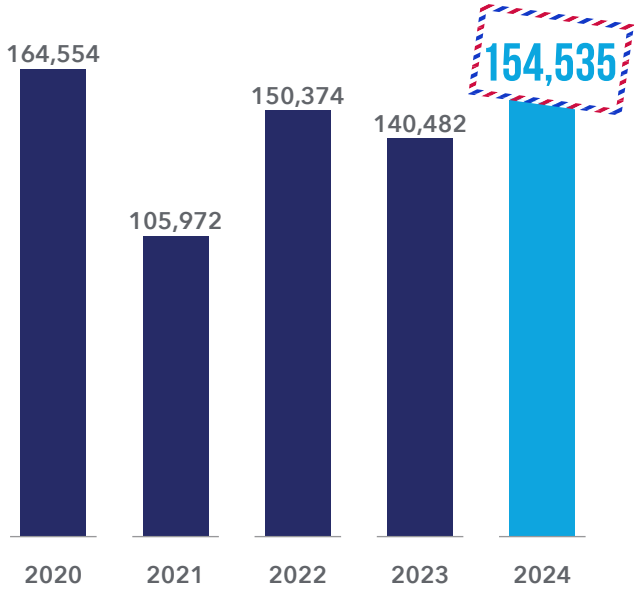
This remains the most widely used postal service for domestic correspondence, involving the collection, processing, and delivery of standard letters and documents within Uganda through the ordinary post office boxes. While affordable and accessible, it does not include tracking or proof of delivery.

Figure 43 Traditional Mail Post Office Boxes

Domestic and International Registered Letters

Registered letters provide enhanced security, with each item assigned a unique registration number for tracking from posting to delivery. This service is particularly important for sending sensitive documents, requiring a signature upon receipt to provide legal proof of delivery.

Figure 45 Ordinary Letter Traffic (2020-2024)

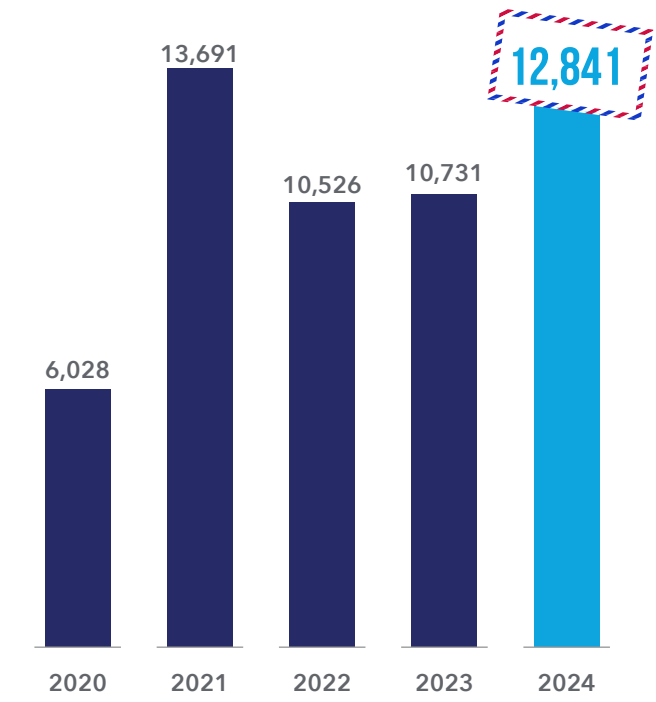


In 2024, domestic ordinary letter volumes in Uganda rose by 10% to **154,535** items, reversing the decline recorded in 2023. This growth mirrors a broader global trend observed by the Universal Postal Union (UPU), where although traditional letter volumes continue to face long-term decline, there has been a stability and selective recovery in certain markets.

Globally, physical mail is being repositioned to serve niche but resilient functions such as government notices, banking and insurance communications, and hybrid mail that complement digital platforms. Uganda's experience reflects this pattern: while informal communication has shifted online, demand for secure, trusted, and legally recognized delivery channels continues to sustain letter mail, particularly in business and public sector services.

Domestic Registered Letters

Figure 46 Growth and Formalization in Domestic Registered Letters (2020 - 2024)

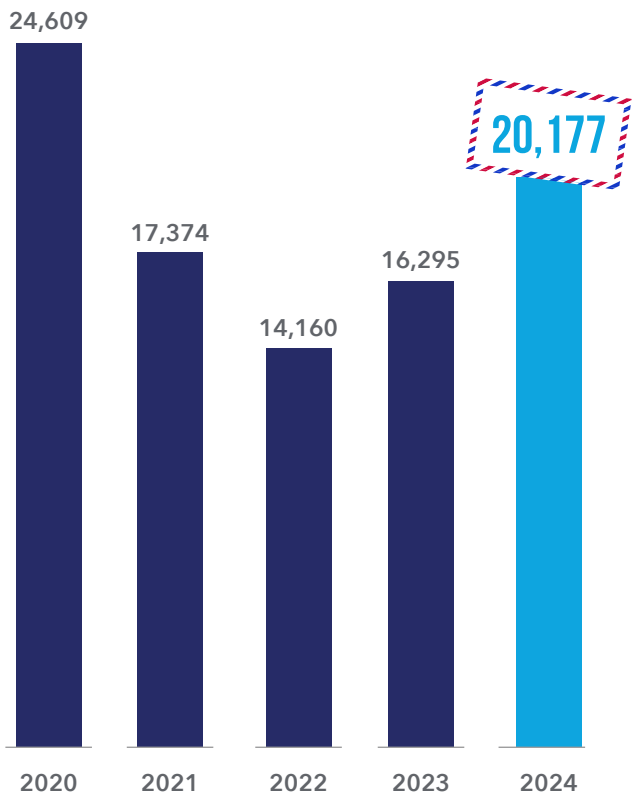


The domestic registered letters segment exhibited growth in 2024, highlighting its increasing importance in Uganda's formal economy. Volumes grew to **12,841,** a significant increase of nearly 20% from the 10,731 letters registered in 2023. This performance not only highlights an annual recovery but also continues an upward trend observed over the past five years. Since 2020, the volume of domestic registered letters has more than doubled, climbing from just over 6,000 to 13,000, demonstrating sustained and substantial demand for this secure mail service.

This growth trajectory in Uganda is particularly noteworthy when viewed against global trends. While many postal operators worldwide continue to see a structural decline in traditional letter volumes due to electronic substitution, Uganda's registered mail segment is holding fort. This suggests that rather than becoming obsolete, the service is adapting to fill a critical niche, driven by specific local economic, legal and regulatory dynamics.

Registered Letters

Figure 47 Trends in Registered Letters (2020 – 2024)



After experiencing a steady decline from 2020 to 2022, the number of registered letters received in Uganda showed a clear recovery in 2023, rising by approximately 15.08%, from 14,160 in 2022 to 16,295 items. This resurgence highlighted a renewed demand for secure and trackable mail services.

The upward trend accelerated in 2024, with registered letters increasing by 23.82%, from 16,295 in 2023 to **20,177** items. This continuous growth indicates not only a short-term increase but also a potential long-term recovery for this critical postal segment. By 2024, the volume of registered letters was approaching pre-pandemic levels recorded in 2020 (24,609 items), an indication that the service has regained much of its previous traction.

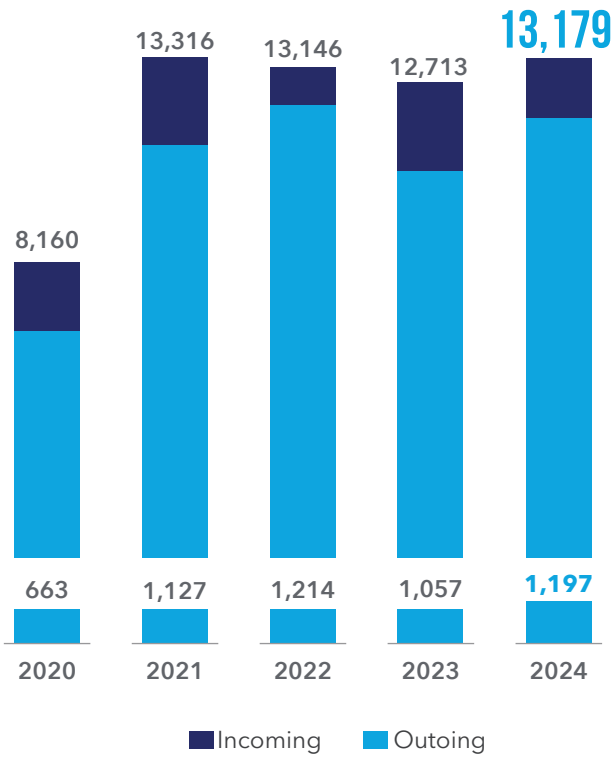
The growth of incoming registered letters reflects several key factors:

- The increase in parcels and documents from both local and international sources drives demand for registered services as a result of rising e-commerce activity.
- SMEs and larger businesses increasingly use registered mail for contracts, invoices, and sensitive communications, valuing the service's tracking and proof-of-delivery features.
- Improvements in sorting, distribution, and digital tracking systems by Posta Uganda have strengthened service reliability, encouraging more users to opt for registered mail.

This growth shows the continued relevance of secure, trackable postal services in Uganda, even as digital communication channels expand, positioning registered letters as a vital component of the country's postal and courier ecosystem.

UPL Parcel Traffic

Figure 48 Parcel Traffic (2020-2024)



Parcel traffic at Uganda Post Ltd remained robust between 2020 and 2024, reflecting the strong impact of e-commerce and cross-border trade. Volumes rose sharply from 8,823 items in 2020 to 14,443 in 2021 as pandemic restrictions eased, before stabilising at an annual average of over 13,000 items through 2024.

Outgoing parcels consistently accounted for more than 90% of traffic, underscoring Uganda's growing demand for international online purchases from platforms such as Jumia, Amazon, and Alibaba, while incoming parcels remained steady, driven by imports of consumer goods and electronics. By 2024, total parcel traffic stood at 13,179 items (11,982 outgoing and 1,197 incoming), highlighting Uganda Post Ltd's continued role as a key enabler of trade and e-commerce despite rising competition from private courier operators.

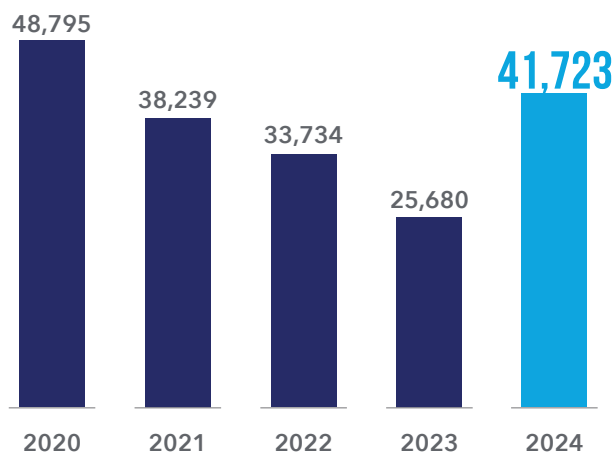
Expedited Mail Service (EMS)

As a signatory to the Universal Postal Union (UPU), Uganda is committed to providing efficient and reliable international postal services. This commitment is reflected in the provision of Expedited Mail Service (EMS), the UPU's premier express delivery product.

EMS is a global brand that represents the fastest cross-border postal service for documents and merchandise, prioritized over other mail items, and adheres to international standards for speed, reliability, and security. Through EMS, Uganda connects to a global network spanning over 180 countries and territories, offering customers a high-quality, competitive, and affordable express delivery service while leveraging the extensive last-mile coverage of the postal network.

> **EMS is a global brand that represents the fastest cross-border postal service for documents and merchandise, prioritized over other mail items, and adheres to international standards for speed, reliability, and security.**

Figure 49 EMS (Domestic) Trends (2020 - 2024)



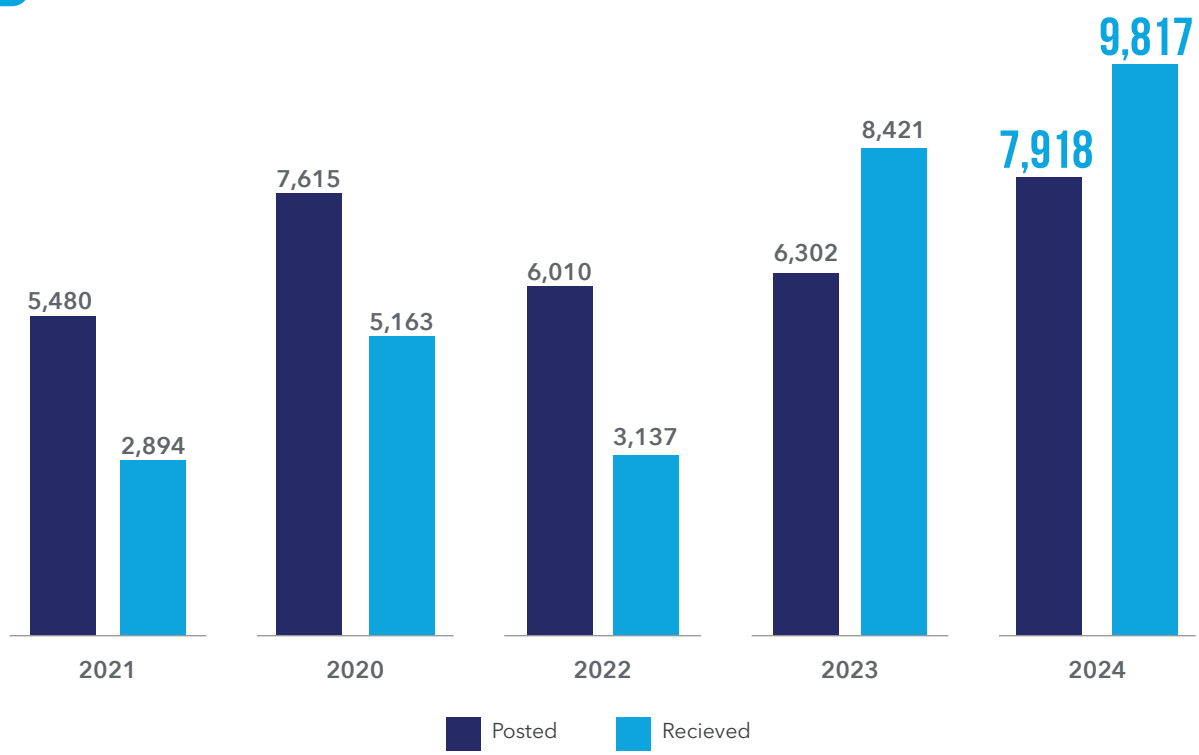
Dedicated to Fast and Reliable Deliveries

The EMS Uganda head office is located within the Uganda Post Ltd headquarters at Plot 35, Kampala Road.

Domestic EMS volumes experienced a decline from 48,795 items in 2020 to 25,680 items in 2023, largely due to post-pandemic economic slowdowns. However, domestic EMS rebounded strongly in 2024, increasing by over 62% to 41,723 items, signalling renewed demand. International EMS outgoing traffic grew from 5,480 items in 2020 to 7,615 in 2021, dipped slightly in 2022, and then rose steadily in 2023 and 2024, reaching 7,918 items in 2024, surpassing all previous years.

This resurgence underscores the critical role of EMS in supporting both domestic and international commerce, particularly for businesses and e-commerce platforms that rely on fast, secure, and trackable mail services.

Figure 50 International EMS outgoing traffic (2020 - 2024)



International EMS incoming traffic in Uganda declined in 2022 but rebounded strongly in 2023 and 2024. Volumes nearly tripled from 3,137 items in 2022 to 8,421 in 2023, and further increased to 9,817 items in 2024, reaching the highest level recorded in the period under review.

This significant growth in international EMS, alongside the domestic EMS recovery in 2024, is driven by several key factors:

Booming E-commerce and Cross-Border Trade Increased online shopping and international business transactions have fuelled higher demand for fast, reliable delivery of parcels and documents.

Enhanced Logistics Infrastructure and Partnerships Investments in track-and-trace systems and collaboration with private courier operators have improved efficiency, reliability, and service visibility for incoming international mail.

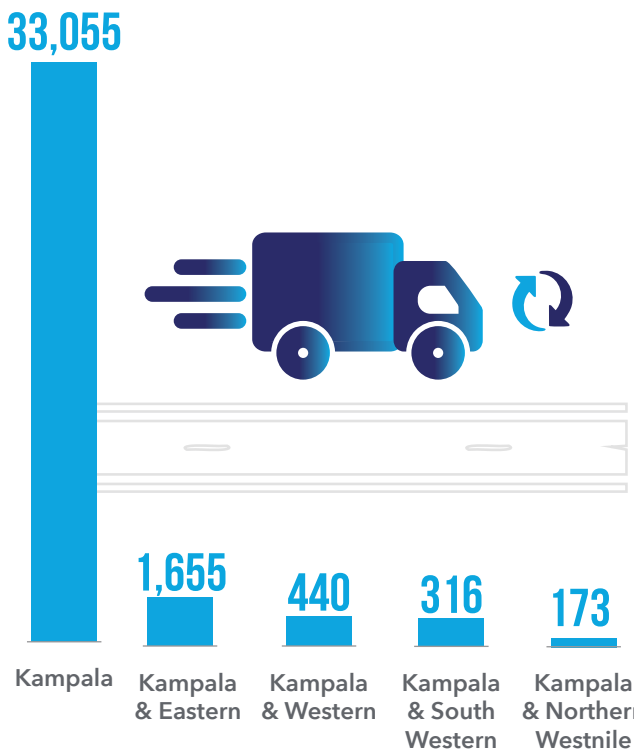
Courier Business

The private courier business in Uganda has experienced rapid expansion, driven by the growth of e-commerce, regional trade, and increasing consumer demand for reliable last-mile delivery.

Domestic Courier Traffic

Inter City Courier Traffic

Figure 51 Domestic Courier Traffic



Kampala Traffic
Domestic courier traffic in Uganda is heavily concentrated in Kampala, which accounted for 33,055 items during the reporting period—over 85% of total domestic volumes. This reflects Kampala's central role as the country's economic, commercial, and e-commerce hub, where most of the courier demand originates from businesses, financial institutions, and online marketplaces.

Eastern Region Traffic
Beyond Kampala, the Kampala–Eastern corridor recorded the highest regional traffic with 1,655 items, significantly ahead of other routes. This trend can be attributed to the Jinja–Mbale–Malaba corridor, which is a major trade and transport route connecting Uganda to Kenya and the Port of Mombasa. The Eastern region also hosts growing industrial zones and universities, contributing to higher parcel movements compared to other regions.

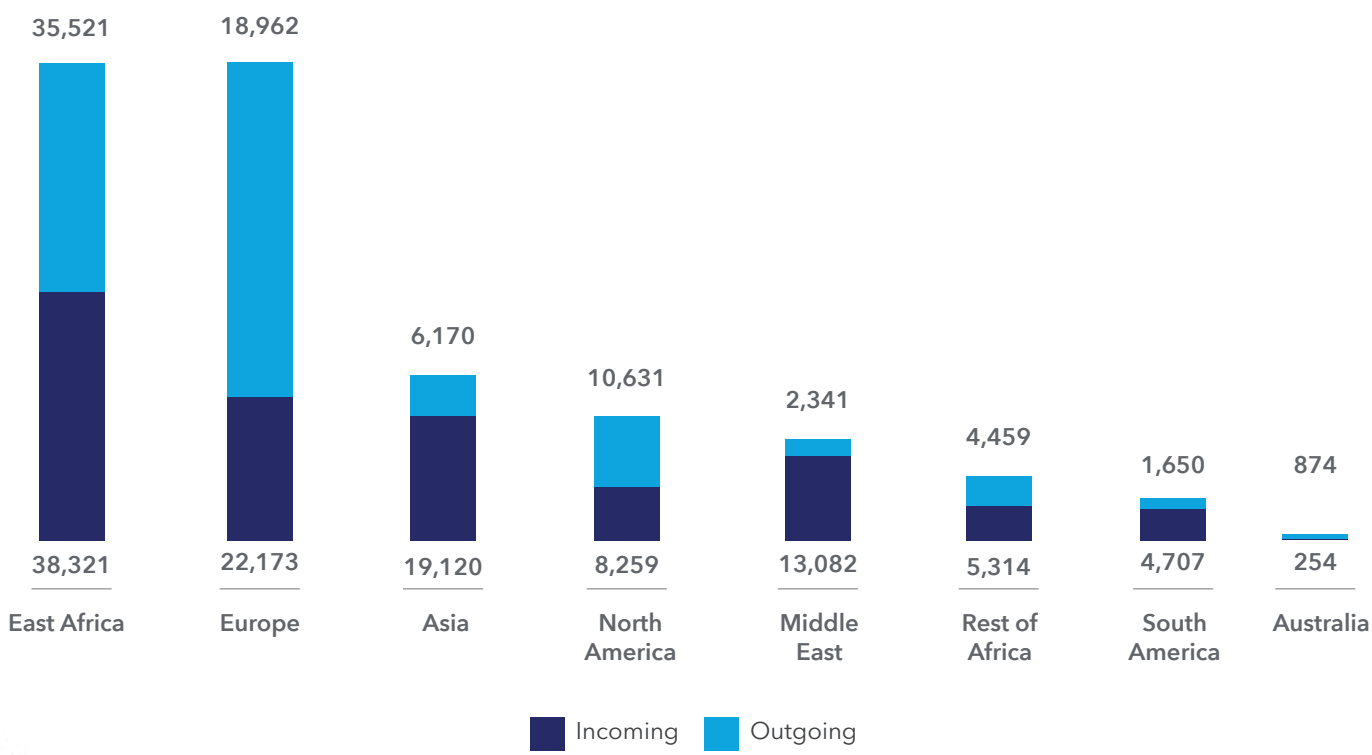
Western Region
Traffic to the Western (440 items), South-Western (316 items), and Northern/West Nile (173 items) corridors remains relatively lower. These regions are less industrialized and more rural, with courier demand mainly driven by smaller trading centers, education institutions, and government offices. However, improvements in road infrastructure (such as the Kampala–Masaka–Mbarara and Kampala–Gulu highways) and cross-border trade with Rwanda, DR Congo, and South Sudan are expected to gradually boost volumes along these routes.

North and West Nile
The Northern and West Nile corridor (173 items) recorded the lowest activity but demonstrated a gradual pickup from Q1 to Q3, signalling emerging opportunities linked to cross-border trade with South Sudan and DR Congo.

Table 6 Quarterly Regional Domestic Courier Traffic (2024)

Region/Route	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Annual Total 2024
Kampala	8,199	7,982	8,722	8,152	33,055
Kampala_Eastern	235	441	578	401	1,655
Kampala_Western	61	11	198	170	440
Kampala_South_Western	56	38	44	178	316
Kampala_Northern_Westnile	8	37	77	51	173
Total Courier Traffic	**8,559**	**8,509**	**9,619**	**8,952**	**35,639**

Figure 52 International Courier Traffic



As a landlocked country, Uganda relies heavily on international courier services to connect with global markets and communities abroad. These services are essential for trade, enabling the fast movement of documents, samples, and high-value goods. They also play a key role in linking Uganda's diaspora with their families, allowing for the exchange of personal effects, gifts, and other items. In 2024, Uganda's international courier traffic reflected diverse regional linkages, with East Africa standing out as the dominant hub, handling the largest share of volumes. The region registered 38,329 incoming items and 35,521 outgoing items, underscoring the central role of regional trade integration and the growing e-commerce exchanges with neighbouring countries such as Kenya, Tanzania, and Rwanda.

Europe emerged as the second-largest partner, with 22,173 incoming and 18,962 outgoing items, reflecting long-standing commercial, educational, and diaspora connections. Similarly, Asia (19,120 incoming and 6,170 outgoing) showed significant activity, much of it tied to Uganda's import flows of manufactured goods, electronics, and textiles, while exports remained comparatively lower.

North America recorded 10,631 outgoing and 8,259 incoming items, driven by diaspora-related shipments, business correspondence, and small-scale e-commerce consignments. The Middle East recorded 13,082 incoming and 2,341 outgoing items, mirroring the growing number of Ugandans working abroad and the inflow of remittances-supported goods.

Other regions such as the Rest of Africa (5,314 incoming; 4,459 outgoing) and South America (4,707 incoming; 1,850 outgoing) recorded relatively modest but steady traffic. Australia contributed the least volume (824 outgoing only), signalling a very niche but existing link.

Table 7 International EMS outgoing traffic

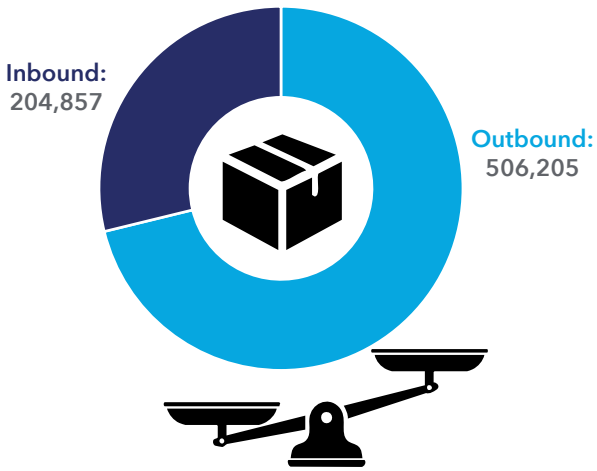
Region	Incoming (Units)	Outgoing (Units)	Net Flow (Incoming - Outgoing)	Total Traffic
North_America	8,259	10,631	-2,372	18,890
Asia	19,120	6,170	12,950	25,290
Europe	22,173	18,962	3,211	41,135
East_Africa	38,329	35,521	2,808	73,850
Rest_of_Africa	5,314	4,459	855	9,773
South_America	4,707	1,650	3,057	6,357
Australia	254	874	-620	1,128
Middle_East	13,082	2,341	10,741	15,423

The Net Import Regions, Asia (–12,950), Middle East (–10,741), and Europe (–3,211) are Uganda's strongest sources of incoming traffic, reflecting the country's reliance on imports from these hubs. While Net Export Regions North America (+2,372) and Australia (+824) are the only regions where Uganda sends more items than it receives, highlighting the role of diaspora ties and demand for Ugandan-origin goods. Regarding balanced Trade, East Africa (–2,808) shows the smallest gap compared to Asia and the Middle East, reflecting relatively more balanced regional exchanges.

Overall, Uganda's international courier balance is import-heavy overall, driven by Asia, Europe, and the Middle East, but the country shows encouraging export strength towards North America and niche markets like Australia.

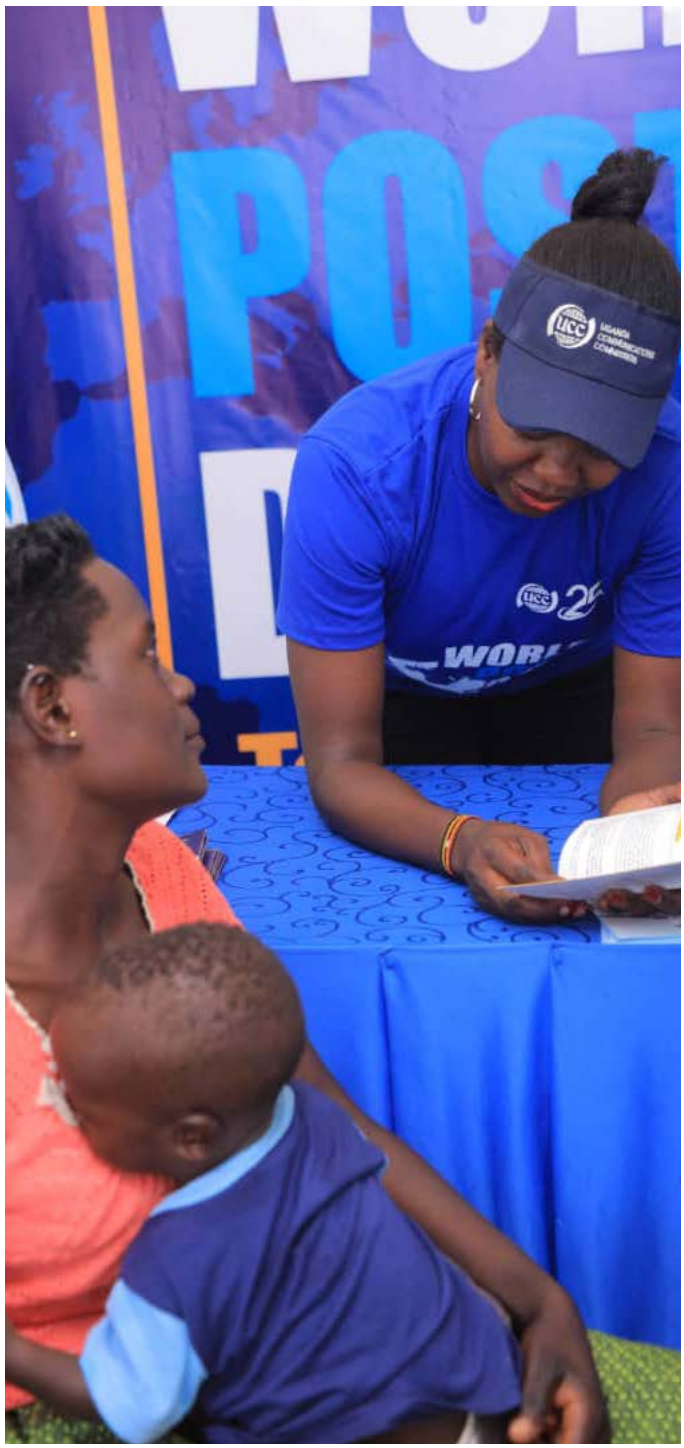
Weight of Courier Items

Figure 53 Weight of Courier Items (Kilograms)



In 2024, the total weight of inbound postal courier items stood at 506,205 kilograms, more than double the weight of outbound items, which totaled 204,857 kilograms. This disparity reflects Uganda's continued reliance on courier services for imports; particularly lightweight consumer goods and small parcels ordered through international e-commerce platforms.

The higher inbound weight is consistent with the trade patterns observed above, where Asia, Europe, and the Middle East serve as the primary sources of incoming courier traffic. Outbound shipments, while substantial, are comparatively lower in weight and often comprise documents, personal effects, and niche exports with a smaller physical footprint.

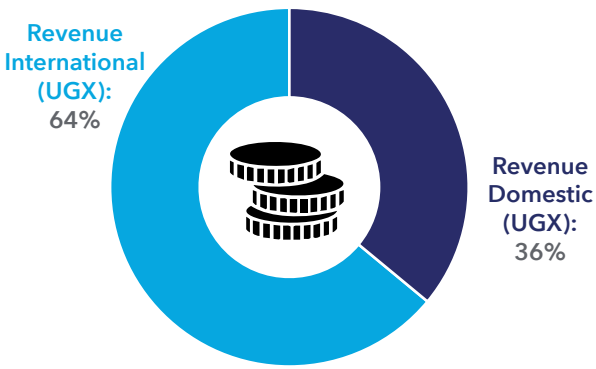


Post and Courier Finance

Table 8 Post and Courier Finance

Revenue Domestic (UGX)	4.8 Billion
Revenue International ((UGX)	8.5 Billion
Total Revenue	**13.3 Billion**

Figure 53 Post and Courier Revenues 2024



Bridging the Infrastructure Access and Usage Gaps

Coverage Gaps

The coverage gap highlights uneven geographic availability of postal and courier services, particularly between urban centres and rural or remote areas. Posta Uganda, the national postal operator, runs over 98 post offices and maintains 70,000+ post office mailboxes, predominantly in urban and peri-urban areas. Private courier companies such as Nation Courier, Vision Couriers, Aramex and DHL Uganda primarily operate in major towns and cities, including Kampala, Jinja, Mbarara, Gulu, Mbarara and Mbale with limited presence in rural districts.

The Commission recently expedited 156 existing pick-up and drop-off points in 51 districts, reflecting a dispersed network of informal and formal access points throughout the country. Informal delivery networks using boda-bodas and taxis fill gaps in rural coverage but lack regulation, consistency, and guaranteed quality.

Access Gaps

The access gap involves barriers such as cost, digital literacy, and awareness that limit the use of existing postal and courier infrastructure. Digital addressing innovations such as e-posta have made postal services more accessible, especially for users without formal physical addresses. However, many Ugandans, particularly in rural areas, face affordability challenges and limited digital access, restricting their use of licensed courier services.

Private courier firms are increasingly adopting digital tracking, mobile payments, and flexible delivery models to enhance access for SMEs and urban customers, but these services remain less accessible to rural populations. The Commission's licensing reforms have increased the number of formally licensed courier operators from 17 to over 40, improving service reliability, but a significant portion of users still rely on informal or unlicensed providers.

Usage Gaps

The usage gap refers to the difference between available infrastructure and actual utilization of postal and courier services. Growth in e-commerce, diaspora remittances, and SME trade is driving increased parcel volumes, yet many consumers still prefer informal delivery due to cost and convenience. Posta Uganda's revenue shows a 64% contribution from international services, indicating heavy reliance on cross-border parcels, while domestic usage is still developing.

Private couriers like Nation Courier report expanding agent networks (over 140 nationwide), offering last-mile and same-day delivery services mostly in urban and peri-urban areas. Despite the rise in licensed operators, unlicensed companies and informal delivery agents remain significant in the domestic courier market, limiting consumer protections and sector growth.

Private courier companies in Uganda are playing a vital role in extending service coverage and introducing innovations such as agent networks, digital tracking, and flexible pricing models. These efforts are gradually reducing coverage, access, and usage gaps, especially for SMEs and rural customers, complementing the extensive but traditionally letter-focused national postal network.

"The Commission's licensing reforms have increased the number of formally licensed courier operators from 17 to over 40, improving service reliability, but a significant portion of users still rely on informal or unlicensed providers."

Key Challenges in Uganda's Post and Courier Sector

Despite significant growth and modernization efforts, Uganda's postal and courier sector continues to face several critical challenges that affect service quality, consumer protection, and market fairness. These key issues require targeted interventions to build a resilient and inclusive postal ecosystem.

Informal and Unlicensed Operators

Several operators of courier companies engage in delivery and logistics activities without holding the necessary postal or courier licenses mandated by the Commission. This creates regulatory grey areas, making it difficult for authorities to monitor, enforce standards, or collect revenue from all market participants. It also undermines the formal sector's efforts to maintain compliance and service quality.
The presence of unlicensed operators dilutes accountability and poses risks to consumers relying on informal or semi-formal delivery channels. Consumers face uncertainty and potential financial loss when services do not deliver on their guarantees or fail to provide transparent complaint resolution mechanisms. Low consumer confidence can deter the use of formal postal and courier services, pushing users toward unregulated alternatives.

Data Exposure and Privacy Concerns

Many private courier companies collect and store personally identifiable information and detailed transaction records without clear sector-specific guidance on data retention, security, and usage. This raises significant privacy risks for customers and exposes operators to potential legal liabilities or data breaches. The lack of a standardized framework for data protection weakens trust and compliance in the sector.

Infrastructure Deficiencies

Uganda's logistics infrastructure remains a critical bottleneck. The country ranked 102nd out of 160 economies in the World Bank's Logistics Performance Indicator in 2018, with particularly low scores for infrastructure (124th) and tracking and tracing capabilities (123rd). The sector's heavy reliance on road transport for over 90% of cargo leads to high freight costs and persistent congestion, while cheaper alternatives like rail and water transport remain largely underutilized. These deficiencies directly impact the speed, cost, and reliability of courier services, especially for last-mile

Digital Divide and Adoption Gap

While Uganda has a growing tech-savvy population and one of the highest mobile money adoption rates in Africa, significant disparities in digital literacy and internet access remain, especially among older adults and residents of rural areas such as Karamoja and parts of Northern Uganda. For instance, while urban areas such as Kampala and Entebbe see widespread use of apps for e-commerce and courier tracking, many rural users still rely on cash transactions and manual booking methods due to limited smartphone penetration and low internet bandwidth.

Traditional postal operators such as Uganda Post Limited have historically been slow to integrate Information and Communication Technologies

(ICTs), partly because of limited competitive pressures, unlike emerging private courier companies like SafeBoda and Jumia Logistics, which leverage mobile apps for real-time parcel tracking and digital payments. This digital divide constrains the reach, efficiency, and user convenience of modern courier services, leaving large segments of the population underserved by technology-driven solutions.

Digital Transformation Roadmap (2023/2024–2027/2028)

Led by the Ministry of ICT and National Guidance, Uganda's Digital Transformation Roadmap outlines the country's journey toward a digitally inclusive society. It focuses on expanding digital infrastructure, including nationwide high-speed broadband, fiber optic networks, and modern data centers, while enhancing e-services such as ePosta for streamlined postal and parcel operations. Strengthening cybersecurity and promoting digital literacy through schools, vocational programs, and community outreach are also central, aiming to bridge the digital divide and enable widespread adoption of technology driven services, including modern courier and postal solutions.

Formalization and Business Environment Reforms

Initiatives such as the Tax Registration and Expansion Program (TREP), Parish Development Model, and the Small Business Recovery Fund are designed to incentivize formalization among SMEs, improve their access to finance, and enhance their skills and market linkages. These programs are crucial for bringing more courier operators into the formal economy.

FILM AND CREATIVES

The Film and Creatives sector is a dynamic and essential component of the modern communications ecosystem, transcending its role as mere entertainment to become a powerful driver of economic growth, cultural identity, and digital innovation.

Film and Creatives Snapshot

Infrastructure

Production Houses

1,213

Film Associations

143

Exhibitors

3,000

Licensed Distributors and Exhibitors

07

Content Development Support Programme

Feature Films

55

TV Drama

15

Animation

07

Short Film

21

Documentaries

15

Uganda Film Festival Awards

Feature Films 77 97

Short Films 106 62

Documentaries 35 31

Animation 20 25

TV Drama 18 23

Student 18 27

East African 29 20

International 59 23

International Film Nominations

55 International Nominations

12 International Awards

2024 2023

Film and Creatives

Audio Visual Infrastructure

The Ugandan film industry, often referred to as Ugawood, has been steadily evolving, showcasing a creative landscape driven by a passion for storytelling and a growing appetite for local narratives. While its formal inception is often attributed to films around the early 2000s, the roots of visual storytelling in Uganda can be traced back earlier, influenced by theatre and later, by the proliferation of video content for public health campaigns.

The industry has seen a significant shift from low-budget, often Do-It-Yourself (DIY) productions, to an increasing focus on higher quality content, partly spurred by latter initiatives such as the Uganda Film Festival organized by the Uganda Communications Commission (UCC) and the emergence of more structured training programs. Despite persistent challenges such as funding limitations and piracy, Ugandan filmmakers continue to carve out their unique space, attracting attention from regional and increasingly, international platforms.

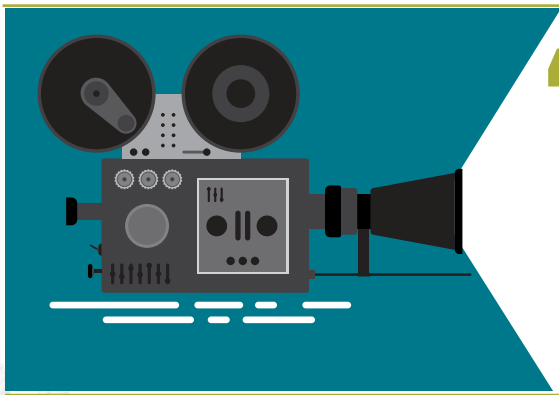
The Ugandan film sector is seeing significant growth, primarily driven by content creators who are passionate about sharing their stories. This growth is fuelling the development of the sector's infrastructure, which is largely an informal, grassroots effort.

Strengthening Uganda's Film Industry through Professional Guilds

The Uganda film industry is supported by a range of specialised guilds that serve as professional collectives for practitioners across various disciplines. These include the National Producers Guild of Uganda (NPGU), the Screenwriters Guild of Uganda (SGU), the Sound Guild, the Actors Guild, the Costume Designers Guild, the Directors Guild, the A.I. and Editors Guild, and the Cinematographers Guild.

While some of these guilds remain informal, they are steadily progressing towards full professionalisation, fostering a more organised and collaborative environment for filmmakers. These guilds offer numerous benefits to Ugandan filmmakers, including advocacy for members' rights, skills development through workshops and training, networking opportunities that encourage collaboration, access to industry resources, and a collective voice to influence policy and standards within the local film ecosystem.

By strengthening these guilds, Uganda's film industry continues to enhance professionalism, artistic quality, and sustainable growth for all creative practitioners involved.



"The Ugandan film industry has seen a significant shift from low-budget, often Do-It-Yourself (DIY) productions, to an increasing focus on higher quality content, partly spurred by latter initiatives such as the Uganda Film Festival organized by the Uganda Communications Commission (UCC) and the emergence of more structured training programs."

The Content Development Support Programme

The UCC has long recognized that beyond showcasing existing talent, active intervention is necessary to foster the creation and financing of local film initiatives. This understanding led to the establishment of the Content Development Support Programme (CDSP), a crucial initiative designed to address the financial and technical gaps faced by Ugandan filmmakers.

The CDSP was born out of the identified need to directly stimulate the production of high-quality audio-visual content in Uganda. It aims to create employment opportunities, generate revenue, facilitate skill acquisition, and ultimately build a robust audience for local content, while also positioning Uganda as a viable filming destination internationally.

The program is structured to ensure sustainability and accountability. The UCC carefully selects project beneficiaries based on clear terms and conditions, not only to encourage worthy winners but also to identify and support applicants who demonstrate a comprehensive understanding of the film ecosystem. A key aspect of this structure is the recoupment model, where beneficiaries are required to refund money to the UCC after generating revenue from their films. This model ensures that successful projects contribute back to the fund, creating a revolving system of support for future local productions.

Emerging from the concerted efforts of the Content Development Support Programme and the overall growth within the industry, Ugandan cinema is increasingly competing and gaining recognition on the international stage. This global performance underscores the growing quality and appeal of Ugandan storytelling, demonstrating the effectiveness of the strategic support initiatives.

Ugandan films and filmmakers are making their mark through nominations and awards at various international festivals and platforms. While the journey is continuous, the presence of Ugandan narratives in global conversations about cinema is a testament to the talent being nurtured within the country.

CDSP Award Categories

	2022	2023	2024
International Film Nominations	40	63	55
International Awards	22	24	23
Award Ratio	55%	38%	41%

Categories CDSP Award Muruals

Year	Category	Applicants	Total
2023	Feature Films	88	159
	TV Drama	39	
	Animation	2	
	Short Films	11	
	Documentaries	19	
2024	Feature Films	55	118
	TV Drama	15	
	Animation	7	
	Short Films	21	
	Documentaries	15	

Film Infrastructure

	2023	2024
Production Houses	1,213	1,213
Film Associations	143	143

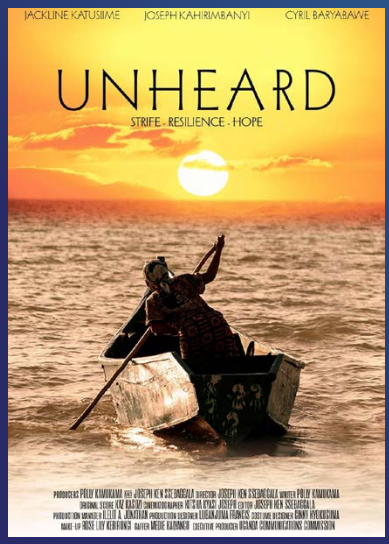
	2023	2024
Exhibitors	474	3,000
Licensed Distributors and Exhibitors	26	32

CDSP Phase II Releases

Karamoja

Release Date:
February 2024

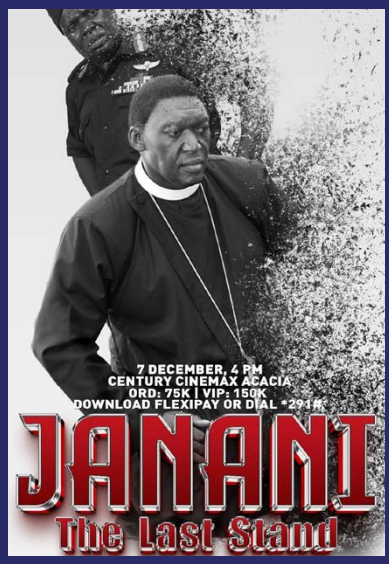
Notable Film Awards:
Winner - African Tough Film Festival (USA), iKON Awards (Uganda), and The Kaduna International Film Festival (Nigeria).



Unheard

Release Date:
August 2024

Notable Film Awards:
Winner - Kalasha Film & Television Festival (Kenya), BSIFF (Ghana), AHRFF (South Africa), AMAA (Nigeria), and AFRIFF (Nigeria)



Janani: The Last Stand

Release Date:
December 2024

Notable Film Awards:
Winner - Best Feature Film and Best Actor (East Africa) at the 2025 Zanzibar International Film Festival (ZIFF).

CDSP II Production Phase

Scenes from the production phase of one of the CDSP II beneficiaries – "Tying the Knot," the television drama. The Content Development Support Programme (CDSP) is designed to address the financial and technical gaps faced by the creative industry.

The Regional Film Competitions

The growth of regional film competitions in Uganda is a direct response to a critical need: to unearth and champion local stories from the grassroots, and to stimulate and tap into the immense talent of filmmakers in upcountry settings where formal film infrastructure and opportunities are largely absent.
Recognizing this gap, the UCC spearheaded the creation of the Regional Film Competition (RFC) to address these very issues, providing a platform for diverse narratives and fostering skill development outside of the traditional urban centers.

As such, the number of submissions in the RFC is experiencing annual growth, emphasising the success of this initiative in reaching previously untapped creative pools. The RFC is a highly competitive endeavor, with participation from all corners of the country, dominated largely by the Central region where the film eco system is largely established.

Uganda Film Festival

The culmination of the year's cinematic endeavors across Uganda is celebrated at the annual Uganda Film Festival (UFF), where the various regional film competition winners and country-level entries are recognized and awarded. More than just an awards ceremony, the UFF has grown into an event that draws a host of participants from across the East African region and internationally. It is now a recognized and significant event within the African film sector, serving as a vital platform for networking, showcasing talent, and fostering collaborations.

The UFF encompasses a diverse series of events designed to uplift and develop the industry. These include extensive film screenings, allowing audiences to engage with the latest Ugandan and regional productions, alongside comprehensive training workshops in film production and content videography. These educational components are crucial for capacity building, equipping emerging and established filmmakers with the skills needed to compete on a global stage.

The 2024 edition of the UFF saw a compelling array of submissions, with short films and documentaries notably dominating the entries. This trend highlights a growing strength in these formats, often serving as powerful vehicles for local storytelling and addressing pertinent societal issues.

Table 9 Regional Film Competitions (2022-2024)

Regional Film Competitions	2022	2023	2024
Northern	10	50	41
Eastern	8	13	14
Central	9	41	47
Western	12	32	24
Totals	**39**	**136**	**126**

Table 10 2024 UFF Winner Categories

Year	2023	2024
Feature Films	97	**77**
Short Films	62	**106**
Documentaries	31	**35**
Animation	25	**20**
TV Drama	23	**18**
Student	27	**18**
East African	20	**29**
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Regional Film Competitions (RFC) 2024

Uganda Film Festival (UFF) 2024

Creative Sector Challenges

The Ugandan film industry presents a compelling paradox: a sector rich with creative energy and a growing audience, yet constrained by foundational systemic challenges. Fueled by captivating local narratives and a public eager for authentic storytelling, the industry has grown. This creative vitality has transcended local boundaries, with filmmakers achieving international acclaim despite operating on very small budgets.

Examples include Isaac Nabwana's "Who Killed Captain Alex?" which garnered global recognition for its unique, low-budget action style, and Loukman Ali's "The Girl in the Yellow Jumper," which was a pioneering Ugandan production to be featured on a major streaming platform like Netflix. This demonstrated capacity for global reach underscores the immense, albeit largely untapped, potential of Ugandan filmmakers to create content that resonates far beyond national borders.

Despite these creative successes, the industry continues to grapple with significant and deeply interconnected challenges. These obstacles are not isolated but rather form a complex, self-reinforcing cycle that stifles growth and professionalization. This report will provide a detailed analysis of four primary hurdles: the profound scarcity of capital for film projects, the nuanced and often difficult-to-navigate government funding mechanisms, the prohibitively high cost of essential filmmaking equipment, and the underdeveloped ecosystem for marketing and distribution.

Financing

The most formidable barrier for Ugandan filmmakers is the consistent lack of adequate funding. The industry suffers from a profound deficit of both public and private investment, forcing creators to operate with limited resources. While other sectors like agriculture and manufacturing can secure credit, the creative arts are widely perceived as a "high-risk" venture by commercial banks and private investors. This perception is reflected in the high cost of credit, with the average lending rate in commercial banks standing at 18 percent.
This prohibitively high cost renders traditional loans an unviable option for the vast majority of filmmakers. The financial sector's hesitation stems from a lack of established frameworks to evaluate the commercial viability of film projects, leading institutions to mitigate perceived risk through high interest rates. This systemic under-valuation of the creative sector as a legitimate business enterprise perpetuates a cycle of undercapitalization and amateurism.

Equipment and the Price Barrier

Beyond the general lack of capital, filmmakers face the specific and acute challenge of acquiring high-quality production equipment. Taxes on essential items are incredibly high. The cost of professional-grade cameras, lighting, sound gear, and editing software represents a formidable financial barrier. An analysis of online retail platforms shows that even mid-range equipment, such as a professional gimbal, can cost well over UGX 2 million, while digital cameras can be priced from hundreds of thousands to several million Ugandan shillings. This financial burden directly impacts the quality of cinematic output and makes it difficult for Ugandan productions to compete with regional and international counterparts that have access to superior technology.

Marketing and distribution

The final, and perhaps most critical, challenge is the profound lack of a formidable and unified film market in Uganda. The industry operates without dedicated distribution companies, forcing filmmakers to take on the complex and costly role of self-distributing their work. This market void leads to severely low box office numbers, with most films earning less than $1,000, a figure "far below the cost of making a film anywhere in the world".
The failure of the market is not due to a lack of audience interest; the public is eager for relatable stories and local films are well received when they can be found. The problem lies in the absence of an accessible infrastructure to connect creators with their audience. Filmmakers face a paradoxical situation where their creative work is appreciated, but they are "underpaid" because the supply chain—a unified digital or physical platform for consumption—is broken.

Piracy

Compounding the distribution challenge is the pervasive threat of piracy and the lack of robust intellectual property protections. Weak copyright laws and ineffective legal frameworks make filmmakers hesitant to release their work on widely accessible platforms. This fear of infringement and revenue loss leads many creators to "shelve their movies after premiering them" or to limit screenings to controlled environments like cinemas and international festivals where their work is more secure. This fear-driven behavior directly exacerbates the distribution problem.
The lack of legal and regulatory protection actively discourages the public release of content, thereby contributing directly to the underutilization of existing channels and the continued absence of a unified home market. This self-imposed limitation on public access, driven by a lack of trust in legal frameworks, becomes a major impediment to the industry's financial growth.

The Ugandan film industry presents a compelling paradox: a sector rich with creative energy and a growing audience, yet constrained by foundational systemic challenges. Fueled by captivating local narratives and a public eager for authentic storytelling, the industry has grown. This creative vitality has transcended local boundaries, with filmmakers achieving international acclaim despite operating on very small budgets.

Navigating Challenges in Film

Alternative funding models

The Uganda Communications Commission (UCC) has made a concerted effort to address the funding gap through its Content Development Support Programme (CDSP). Since its inception in 2020, the program has provided vital financial support, with a notable grant of Shs 1.2 billion awarded to 14 filmmakers in 2023. The initiative is designed to boost production, increase the competitiveness of Ugandan content, and create employment within the audiovisual industry. By focusing on local content that promotes Ugandan culture and tourism, the CDSP represents a crucial step by the government to formalize and support the sector.

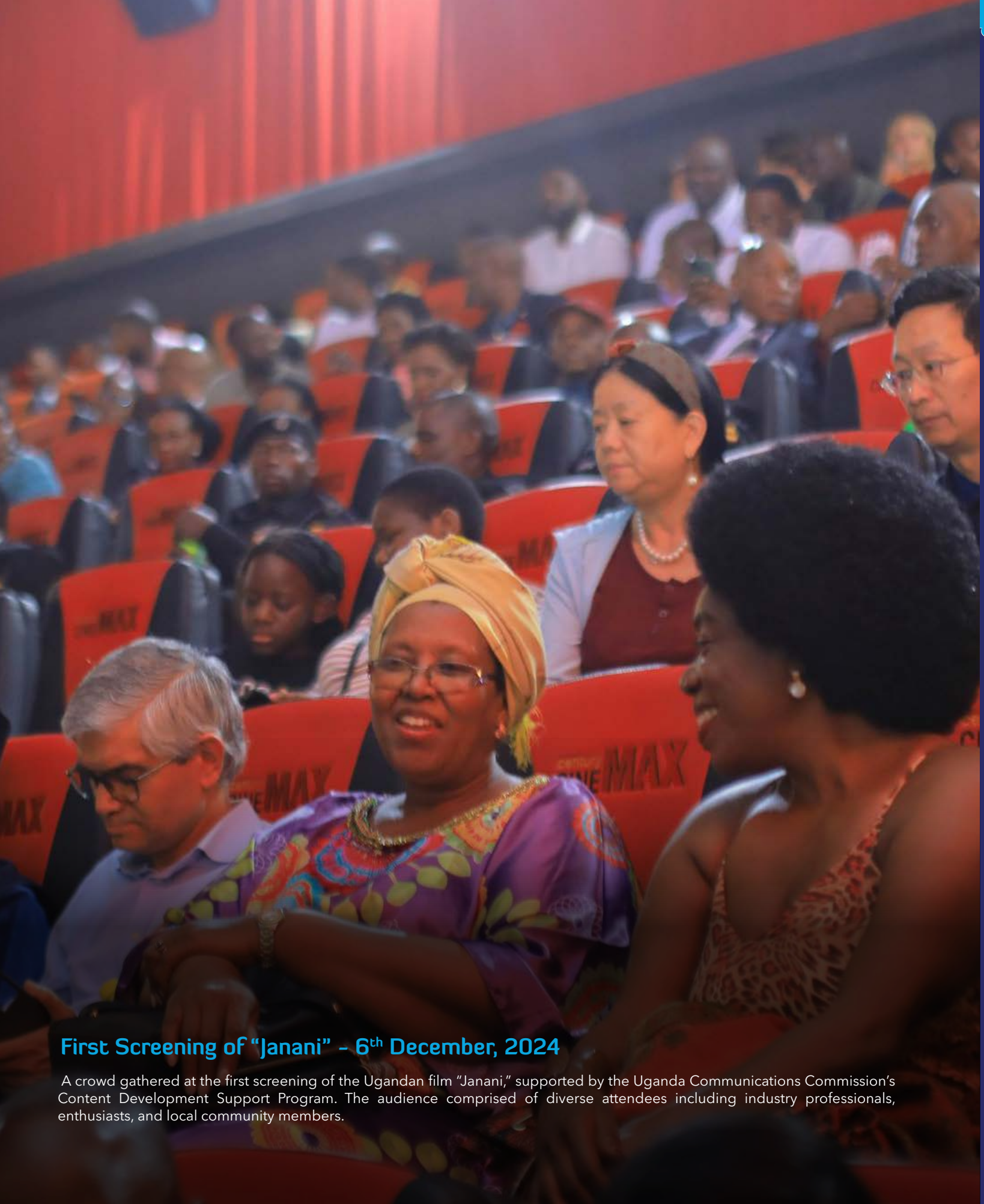
Strengthening the Distribution Ecosystem

The creation of a formidable home market is paramount. The creatives sector has created in itself a centralized, secure digital platform for Ugandan films, similar to the Kibanda Xpress audiovisual platform launched in 2021, but with robust legal protections to combat piracy.

It is also essential to formalize the role of distribution companies to provide filmmakers with professional expertise and global networks, freeing creators to focus on their craft. The Commission has supported its RFC and UFF programme with trainings on logistical and film distribution channels to support the growing sector.

Fostering Collaboration and Capacity

A fundamental shift from individualistic tendencies to collective action is needed to build a sustainable industry. Industry guilds and professional film associations have been strengthened to provide a unified voice and to act as a central hub for training, information sharing, and collective action. The associatins in partnership with the Commission organise workshops on intellectual property law, marketing, and business management.



First Screening of "Janani" – 6th December, 2024

A crowd gathered at the first screening of the Ugandan film "Janani," supported by the Uganda Communications Commission's Content Development Support Program. The audience comprised of diverse attendees including industry professionals, enthusiasts, and local community members.

MULTIMEDIA SERVICES

Multimedia services like broadcast radio and television (TV) continue to form the foundational layer of the communications sector, offering widespread, accessible platforms for information and entertainment to large, often geographically dispersed audiences.

TV, Radio and Pay TV Services

Broadcasting Infrastructure

FM Radio

FM Radio continues to hold its position as Uganda's dominant media platform, largely unconstrained by technological barriers and primarily limited only by access to power. Its widespread accessibility, particularly through basic and feature phones prevalent across the country, further solidifies its relevance in a converging mobile landscape. Radios remain the single biggest source of information in Uganda, reaching approximately 98% of the area landmass of Uganda.

Table 9 International Film Nominations

Total Radio Licenses	FM Licenses	Online Licences
290	284	06

At the end of December 2024, the Uganda Communications Commission issued a total of 290 broadcasting licenses. Of these, 284 were for FM radio stations, while 6 were dedicated to online radio, including platforms.

This contrast underlines the enduring preference for traditional radio consumption among Ugandans, a trend that diverges significantly from the visual media sector where online content is rapidly gaining traction. Despite the rise of digital alternatives, traditional radio remains an indispensable source of information, particularly vital for lower-income and rural populations.

Digital Audio Broadcasting

Uganda's readiness for DAB (Digital Audio Broadcasting) remained at its very nascent stages in 2024 with government focusing on pilot projects and policy formulation during the year. UCC has taken the following exploratory steps towards DAB adoption:

DAB+ pilot project – the pilot project was launched on 28th September 2023, covering greater Kampala within a radius of 60kms from the city center, and was aimed at evaluating the technology market readiness as well as have early appreciation of costs and commercial models for this value chain. A total of 6 radio stations were on boarded for this trial. These radios were KFM, Galaxy FM, XFM, Next Radio, Green Radio and UB Star FM.

UCC is now a member of WorldDAB, signifying commitment to exploring and aligning the global digital radio broadcasting standards and best practices.

Despite these positives, a full national transition to DAB usage faces significant hurdles including:

01 High investment costs for new digital transmitters, multiplexing centers and studio upgrades

02 Slow consumer receiver adoption due to the high cost of dab compatible radio receivers

03 A need for spectrum reforms for dab spectrum allocation licensing and technical standards

04 A need for new investment in dab studio infrastructure

Television - FTAs and Hybrid TV Services

Digital Terrestrial Transmission (DTT) Infrastructure and Hardware

DTT remains a critical component in the broadcast media infrastructure in Uganda. While the initial phase of DTT roll out focused on set top boxes, 2024 has seen noticeable introduction and usage of tuner installed television sets (Integrated Digital Television- IDTV).

These IDTVs negate the need for external decoders, simplifying user experience and making Digital TV more accessible to new TV purchase and therefore a more seamless transition from analog to Digital TV.

On the DTT supply side, the key players in the Ugandan market are;

Signet Uganda

The Designated National DTT Distributor and a subsidiary of the Uganda Broadcasting Corporation – UBC provides transmission services to all licensed Free-to-Air (FTAs). DTT broadcasters operate on common carrier principles. Presently, SIGNET is carrying 51 FTA channels at its Kampala based Multiplexer MUX and 19 transmission sites countrywide.

Star DTV Uganda Limited (StarTimes)

This is a prominent Chinese-owned pay TV operator holding a sizeable Pay TV market share in Uganda. It is largely known for its affordable bouquets and extensive content offerings covering both local and international channels. StarTimes operates a DTT infrastructure service using 7 transmission sites in Gulu, Mbale, Jinja, Kabarole, Mbarara, Masaka and Kampala districts.

Go-TV

As the subsidiary of Multichoice Africa Holdings BV, GoTv targets the DTT markets. It leverages Multichoice Africa Holdings BV using DSTV diverse content library, particularly sports and premium entertainment to offer more affordable packages via DTT.

Direct to Home Transmission

In the Ugandan ICT market, Direct-to-Home (DTH) Transmission plays a significant role in providing television services across the country, leveraging satellite technology to deliver a wide array of channels directly to subscribers' homes, often reaching areas beyond terrestrial broadcast coverage. Key players include:

Star DTV Uganda Limited (Star Sat)

StarSat, part of Star DTV Uganda Limited, is a major DTH provider in Uganda, offering diverse content bouquets via satellite to cater to various consumer preferences.

MultiChoice Africa Holdings BV.

MAH, through its flagship DStv brand, provides DTH services in the Ugandan market, offering a wide range of international and local channels, including premium sports and entertainment.

Azam TV

Originating from Tanzania, Azam's DTH and satellite service competes primarily on price and a strong focus on local content and local

sporting rights. Azam presently carries rights to Tanzanian and Kenyan football leagues, appealing to a segment of the audience keen on regional content.

Zuku TV

The Wananchi Group subsidiary, Zuku TV, offers bundled DTH satellite TV and internet services, providing an integrated solution for consumers seeking both entertainment and connectivity.

Cable Transmission

Kampala Siti Cable

In the cable TV space, Kampala Siti Cable is a notable provider operating primarily within Kampala and Jinja. This provider utilizes Hybrid Fiber-Coaxial (HFC) network technology. HFC networks combine optical fiber for the backbone infrastructure with coaxial cables for the last mile delivery to subscribers' homes. This technology enables Kampala Siti Cable to offer not only multi-channel television services but also high-speed broadband internet, leveraging the robust capacity of fiber optic lines while using existing coaxial infrastructure for cost-effective last-mile distribution.

Free to Air Television

The Free-to-Air (FTA) television landscape holds significant importance from a global policy standpoint, serving as a crucial tool for public information dissemination, education, and cultural preservation without financial barriers.

UCC's role in fostering and regulating this technology and media space is paramount to ensure equitable access to information for all Ugandans. The emergence of FTA in Uganda is a direct outcome of the post-Digital Terrestrial Television (DTT) transition from analog broadcasting, a global shift that necessitated regulatory bodies like UCC to guide their respective nations through this technological adoption.

As of December 2024, Uganda's television broadcasting landscape was characterized by a diverse range of license categories, reflecting the varied operational models of television stations across the country. The total number of licensed Television service providers stands at 68.

Among these, Regional Free to Air (RFTA) licenses are the most numerous. RFTA stations broadcast on a public network, accessible to anyone with appropriate receiving equipment, allowing viewers to access content without incurring subscription fees. The primary provider of this public network in Uganda is "SIGNET."

Table 10 **TV Licensing landscape based on the license categories**

Licence category	Number of TV stations
Regional Free to air (RFTA)	30
Hybrid	28
Online Broadcaster (Multi Stream)	02
Public Infrastructure Provider (PIP)	04
Public Service Provider (PSP) (Multi Stream)	06
Public Service Provider - Landing rights	01
Subscriber Management Service	01

Annual Broadcasters Conference 2024

ABC 2024, held in October 2024, focused on several key issues within the broadcasting sector, including the use of government airtime. Held at the Imperial Royale Hotel in Kampala, the conference addressed matters such as election guidelines and minimum broadcasting standards, alongside the allocation of free airtime for government programming.

PayTV

The narrative of Pay TV in Uganda is one of significant transformation, evolving from a niche, high-cost service for the elite to a more accessible entertainment and information platform for a broader demographic. Over two decades ago, Pay TV was largely synonymous with exclusivity, perceived as luxury only the wealthiest households could afford. The early days saw limited competition, high subscription fees, and often a cumbersome installation process, firmly placing it beyond the reach of the average consumer.

The setup of Pay TV services in Uganda involves a sophisticated infrastructure, spanning from content aggregation to direct viewership. At the core, content providers aggregate a diverse range of programming, including international news, sports, movies, and local content, acquiring broadcasting rights for various channels. This content is then uplinked to satellites or distributed via terrestrial networks.

For satellite-based Pay TV (Direct-to-Home or DTH), the aggregated content is transmitted to satellites orbiting Earth. Subscribers then use a satellite dish to receive these signals, which are then decoded by a set-top box (decoder) connected to their television sets. Terrestrial Pay TV (Digital Terrestrial Television or DTT), on the other hand, utilizes ground-based transmitters, similar to traditional broadcast television, but with digital signals. Viewers in areas covered by these transmitters receive signals via an antenna and a compatible decoder.

Pay TV Subscriptions

The landscape of Pay TV services in Uganda has undergone a significant transformation between January 2024 and December 2024, driven primarily by an increasingly competitive environment and a notable increased access to internet that resulted into a downward shift in internet pricing. This period saw the Uganda Communications Commission (UCC) report a decline in the Pay TV sector, with total subscribers decreasing by 29.5% and active subscribers dropping by a significant 36.3%.

This downward trend in active subscribers is directly correlated with the estimated 58,000 Internet Protocol Television (IPTV) users in the Ugandan market. The reduced cost of internet access has lowered the barrier to entry for these digital alternatives, leading to an emergence of numerous IPTV providers, alongside the rapid proliferation of video streaming services such as YoTV, AfroMobile, Netflix, Showmax, Amazon Prime, YouTube etc. These platforms offer compelling alternatives to traditional Pay TV, with their convenience, affordability, and diverse content offerings proving highly attractive to consumers in Uganda.

Table 11 Number of PAY TV Subscribers

PAY TV Subscribers	2022	2023	2024
Total Subscribers	3.0	3.5	2.5
Active Subscribers	1.6	1.6	1.0
Decoder Activity Ratio	53%	46%	40%

Pay TV Finance and Investment

Revenue

Despite the notable decline in active Pay TV subscribers between December 2023 and December 2024, Uganda's Pay TV sector has demonstrated remarkable resilience and strategic growth, particularly reflected in its financial performance.

The 2023-2024 period observed a positive trend in gross revenue, which increased from UGX 260.54 billion in 2023 to UGX 262.56 billion in 2024. This growth is significant given the decline in active subscribers, highlighting the effectiveness of diversified revenue strategies.

Diversification into Internet Triple Play Services

A primary driver of this revenue growth is the increasing number of operators venturing into "triple play" services. By bundling internet and, in some cases, voice services with traditional broadcast content, Pay TV providers are tapping into new, high-demand revenue streams. This strategy allows them to leverage existing infrastructure and customer relationships to capture a larger share of household spending on communication and entertainment.

Innovative Pricing and Product Bundles

The industry has effectively responded to evolving consumer preferences and economic realities by introducing a wider array of pricing products and packages. This includes:

Solar-powered products:
In rural and off-grid areas, operators have successfully reached a new customer base by offering Pay TV services bundled with solar power solutions. This addresses a critical infrastructure gap, making Pay TV accessible to communities that previously lacked reliable electricity and consequently driving new subscriptions and associated revenues.

Weekly and daily subscription plans:
The introduction of flexible weekly subscription plans (e.g., DStv Compact Shs 37,000, DStv Family Shs 22,000, DStv Access Shs 14,000, and DStv Lumba at Shs 5,000 for 7-day access) has enabled operators to cater to varying income cycles and affordability levels. While individual transactions might be smaller, the cumulative effect of increased accessibility and repeat purchases contributes significantly to overall revenue.

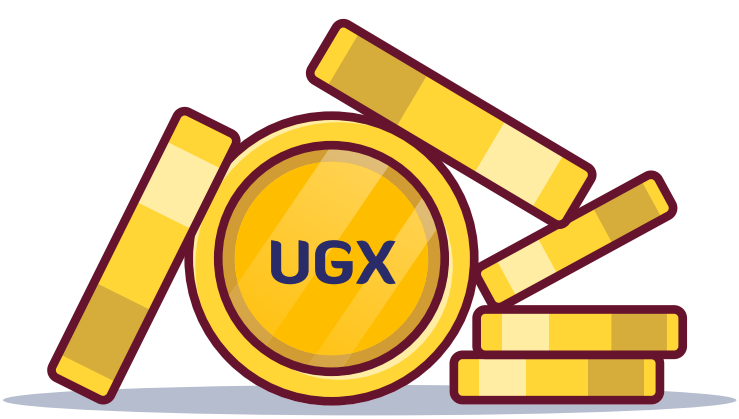
The 2023-2024 period observed a positive trend in gross revenue, which increased from UGX 260.54 billion in 2023 to UGX 262.56 billion in 2024. This growth is significant given the decline in active subscribers, highlighting the effectiveness of diversified revenue strategies.

Investment Trends

The pay industry posted UGX 5.8 billion in capital expenditure from UGX 18.58 billion in 2023 to UGX 5.84 billion in 2024. This shift in investment reflects a change in strategy by Pay TV operators.

01 Strategic Investment for Low-Value Customers: The reduced Capex suggests a potential shift from large-scale infrastructure build-outs to more targeted, efficient investments. A significant portion of current investment is likely focused on acquiring and retaining "low-value" customers, particularly in upcountry settings. This involves continued investment in affordable decoder technologies and innovative delivery mechanisms like solar solutions to reach underserved populations, rather than extensive new network deployments.

02 Driving Demand and Consumption in Public Viewing Areas: Investment is also directed towards fostering Pay TV consumption in communal viewing settings, such as video halls or "bibanda." By supporting these public viewing points, operators aim to expand the overall audience for Pay TV and generate revenue through commercial subscriptions for these venues. The reduced overall Capex also indicated a focus on optimizing existing infrastructure and market penetration through soft initiatives rather than heavy capital-intensive projects.



Tax Contribution

The Pay TV ecosystem in Uganda witnessed a decline in tax contributions, plummeting from UGX 2.40 billion in 2023 to UGX 0.69 billion in 2024.

Uganda's experience with diminishing tax contributions from its Pay TV sector is not an isolated incident; it mirrors a global challenge stemming from the proliferation of unlicensed Internet Protocol Television (IPTV) platforms. These services, often operating outside regulatory frameworks, effectively cannibalize the subscriber bases and revenue streams of legitimate, tax-paying Pay TV operators in various countries worldwide. This has reflected in the following ways;

01 **Revenue Diversion:** Unlicensed IPTV providers offer content, often including premium sports and movies, at significantly lower prices or even for free, as they incur no content acquisition costs or licensing fees. This draws subscribers away from legitimate operators, directly reducing the taxable income of the latter. While legitimate operators like DStv and StarTimes might see some revenue growth from diversified offerings or flexible packages, the core Pay TV subscription base, which contributes substantially to their taxable profits, is eroded.

02 **Evasion of Taxation:** By their very nature, unlicensed IPTV platforms operate in the shadows, evading all forms of local taxes, including corporate income tax, VAT, and licensing fees that legitimate operators are legally bound to pay. This creates an uneven playing field where a growing segment of the market's economic activity generates no tax revenue for the government.

03 **Reduced Profitability for Licensed Operators:** Even if licensed operators manage to maintain or slightly grow gross revenue through diversification, the intense price competition from unlicensed IPTV and the need to invest in new strategies (like weekly plans or bundled services) can compress their profit margins. Since corporate taxes are typically levied on profits, reduced profitability directly translates to lower tax contributions, even if top-line revenue holds steady.

04 **Difficulty in Regulation and Enforcement:** Governments globally struggle to track, regulate, and effectively shut down unlicensed IPTV operations due to their fluid nature, cross-border operations, and reliance on internet infrastructure. This regulatory vacuum allows these platforms to thrive, continuously undermining the tax base of the legitimate industry.

Multimedia Sector Challenges

The dynamic evolution of the ICT landscape, coupled with pre-existing infrastructural and content issues, presents significant challenges across traditional broadcasting and emerging digital platforms:

Unlicensed entities

Interference and unlicensed operations: The traditional FM radio spectrum continues to grapple with interference issues. This arises from technical non-compliance by broadcasters not sticking to allocated frequencies.

Content compliance and ethical breaches

A persistent challenge remains the compliance of broadcasters with national regulatory frameworks such as the Minimum Broadcasting Standards. This includes concerns over the spread of hate speech, misinformation, and non-fact-checked discussions during talk shows, which have inflamed tensions and mislead the public. This is because most broadcasters are currently sourcing their news from social media platforms that lack the element of gatekeeping of information.

Emergence of AI and social media for Content Creation

The rapid advancement of Artificial Intelligence (AI) and the universal nature of social media platforms pose a new threat. These technologies are increasingly capable of generating highly realistic fake content, including deepfakes, which could potentially be disseminated over radio waves or influence content aired on legitimate stations.

Limited national signal distributor coverage

A significant hurdle for free-to-air (FTA) television remains the incomplete national coverage by the National Signal Distributor. This limitation largely stems from infrastructural issues, notably persistent power outages across the country. Frequent and unpredictable blackouts, often attributed to increasing electricity demand, aging infrastructure, and ongoing network upgrades, severely disrupt broadcast transmission and reception, keeping large segments of the population "off air" and hindering the full transition to digital terrestrial television.

Cannibalization by Unlicensed IPTV

The Pay TV sector faces intense pressure from Internet Protocol Television (IPTV) providers both licensed and unlicensed. These platforms offer unauthorized access to premium content, often at significantly lower prices, directly cannibalizing the subscriber base and revenue streams of legitimate, tax-paying Pay TV operators.

Downward shift in internet pricing

The continuous drop in internet pricing acts as a significant catalyst for the increased usage of unlicensed IPTV services. As internet access becomes more affordable and widespread, it lowers the barrier to entry for consumers to access alternative, unregulated online content, further intensifying competition for traditional Pay TV services. However, from the other perspective, IPTV has led to increase in data usage which has translated into more revenues for ISPs and reduced revenues for traditional Pay Tvs.

Multistakeholder approaches in addressing Pay TV challenges

UCC is actively engaged in a multi-faceted approach to address these complex challenges and foster a resilient, compliant, and innovative broadcast market:

Enforcing Content Standards and Redefining Regulatory Frameworks

UCC is enforcing existing content standards in close partnership with the broadcasting industry. This includes taking firm action against instances of hate speech, misinformation, and non-compliance with broadcasting ethics. Concurrently, UCC is undertaking a critical review and redefinition of its regulatory frameworks to ensure they are agile and robust enough to address emerging technologies and market dynamics, thereby enabling broader industry compliance. In realising this, UCC is currently formulating Guidelines for Social Media Use and Online Content. This will improve compliance by broadcasters to the Minimum Broadcasting Standards and other laws.

Addressing AI-Generated Content and Deepfakes

Recognizing the potential threat of AI-generated fake content, UCC has established an AI Taskforce. This team is mandated to develop comprehensive frameworks for the regulation of AI in the communications sector, with a specific focus on combating deepfakes and ensuring content authenticity. Furthermore, UCC actively participates in global forums such as the AI for Good Global Summit, organized by the ITU, to derive key learnings and best practices for content regulation, particularly concerning the ethical and responsible use of AI in broadcasting.

Enhancing Affordability and Fighting Piracy in Pay TV

To counter the impact of unlicensed IPTV and enhance affordability, the UCC is undertaking a costing exercise for Pay TV services. This initiative aims to refine its cost-based pricing models, ensuring that legitimate Pay TV services remain competitive and accessible to a wider range of consumers. Additionally, the UCC is collaborating closely with industry stakeholders, including Pay TV operators and other regulatory agencies such as Uganda Revenue Authority (URA) and the Uganda National Bureau of Standards (UNBS), to combat piracy through enhanced content security measures, public sensitization campaigns on the risks of illegal streaming, and exploration of regulatory solutions to close loopholes that enable piracy.

Improving National Signal Distributor Reach

While directly addressing power outages is beyond the UCC's immediate mandate, the Uganda Communications Commission continues to advocate for reliable power infrastructure and works with relevant utility providers to improve stability. UCC also continues to monitor the progress of the National Signal Distributor in expanding coverage to underserved areas, recognizing that universal access to digital television is crucial for an informed citizenry.

Telecom Companies

S/N	Name of Company	Category of License	Coverage Area
1	Airtel Uganda Limited	NTO	National
2	MTN Uganda Limited	NTO	National
3	Tangerine T/A Lyca Mobile	NTO	National
4	Uganda Telecommunications Corporation Limited	NTO	National
5	Tower Co of Africa	NPIP	National
6	Cloud Core Systems Ltd	NPSP	National
7	Fezatel Limited	RPSP	Central And Eastern
8	Blue Crane Communications Ltd	NPSP	National
9	United Wireless	RPSP	Central And Eastern
10	Hamilton Telecom Ltd	NPSP	National
11	Internet Solutions Uganda Limited	NPSP	National
		RPIP	Central
12	East African Broadband Services	RPSP	Central
13	C-Squared Uganda Limited	RPIP	Central
		NPSP	National
14	Roke Telkom Limited	RPIP	Central And Eastern
		NPSP	National
15	The Bandwidth and Cloud Services Group Limited	NPIP	National
		RPSP	Central
16	Kampala Siti Cable	RPSP	Central
17	Echotel Proprietary Uganda Services	NPSP	National
		RPIP	Central and Western
18	Liquid Intelligent Technologies	NPSP	National
		RPIP	Central and Western
19	Data Net. Com	NPSP	National
		RPIP	Central
20	Gilat Telecom (U) limited	NPSP	National
21	ATC Uganda Ltd	NPIP	National
22	Seacom Uganda Limited	NPSP	National
		RPIP (Central)	Central

Telecom Companies (Ctd)

S/N	Name of Company	Category of License	Coverage Area
23	Sprint Internet Ltd	RPSP	Central
24	The Research and Education Network for Uganda (RENU)	Authorisation to Operate a private Network	National
25	Group Vivendi Africa Uganda Limited	RPSP Central	Central
		RPIP	Central
26	Simbanet Uganda Ltd	RPIP	Western
		RPIP	Central
		NPSP	National
27	Zakom Tech Uganda Ltd	RPSP	Central
28	Cheetahnet Solutions Ltd	RPSP	Eastern
29	Talkio Mobile Ltd	NPSP	National
30	Bayobab Uganda Limited	NPIP	National
		RPSP	Central and Western
31	Airtel Telesonic Uganda Limited	NPIP	National
32	Uganda Electricity Transmission Company Limited	NPIP	National
33	Savannah Fibre Limited	RPSP	Central
		RPIP	Central
34	Ogos-Inno Tech Limited	RPSP CENTRAL	Central
35	Sombha Solutions Store Limited	RPIP Central	Central
		NPSP	National
36	Cedar Green Group Limited	RPSP	central
37	Fast Path Limited T/A Global Path Networks	RPSP	North and Eastern
38	Wananchi Cable Limited	RPSP	Central and Western
		RPIP	Central and Western

Courier Companies

S/N	NAME OF LICENSEE	CATEGORY OF THE LICENSE
1.	Aramex Uganda Ltd	International Courier Services
2.	Boxleo Courier Services SMC Ltd	Domestic Courier Services
3.	Dafric Logistics Ltd	Domestic Courier Services
5.	DHL International (Uganda) Ltd.	International Courier Services
6.	East Man Logistics Ltd	Inter-city Courier Services
7.	eBee Mobility Uganda Ltd	Inter-City Courier Services (Metropolitan)
8.	Group of New Generation Solution (Yellow Bird)	Domestic Courier Services
9.	Freight in Time Uganda Ltd	International Courier Services
10.	Glovo Courier Uganda Ltd	Domestic Courier Services
11.	Hesed Holdings Limited	Domestic Courier Services
12.	Hygiene Couriers ltd	Domestic Courier Services - Intercity
13.	Kwanza Logistics	InterCity Courier Services
14.	Makizto Courier and Logistics Ltd	Domestic Courier Services
15.	Mau Mau Logistics Ltd.	Domestic Courier Services
16.	Minuteman Delivery Services	InterCity Courier Services
17.	Monitor Publications Ltd (Nation Couriers)	Regional (COMESA) Courier Services
18.	Nilestar Tradelink Ltd	Intercity Courier Services
19.	Sail Global Corporation Courier and Logistics	Domestic Courier Services
20.	Speedaf Logistics Uganda Ltd	Domestic Courier Services
21.	Skynet Worldwide Express Ltd	International Courier Services
22.	T.N.T Deliveries Ltd	Domestic Courier Services
23.	Vuka Africa Ltd	International Courier Services
24.	WBPF Consultants Limited	
25.	Zawadi Services LTD	InterCity Courier Services
27.	New Vision Printing and Publishing Co. Limited	Domestic Courier Services
28.	Y.Y Coaches Ltd	InterCity Courier Services
29.	Lechon Ventures Limited	Domestic Courier Services
30.	NFT Mobility Limited	Domestic Courier Services- Intercity (Kampala Metropolitan)
31.	Monitor Publications Limited	Regional Courier

Courier Companies (Ctd)

S/N	NAME OF LICENSEE	CATEGORY OF THE LICENSE
32.	Starline Transport Company Limited	Domestic Courier intercity
33.	Mash Bus Services	Regional Courier
34.	Masterlink Express Uganda Limited	Domestic Courier
35.	The Embassy of the United States of America in Kampala	Diplomatic Post Office
36.	Big Orange Express Courier Ltd	Domestic Courier Services
37.	Market Force Technologies Limited	Intercity Domestic Courier
38.	Mewa Excel Courier Services Limited	Intercity Domestic Courier

Television Stations

No.	Name of Licensee & Call Sign	Call sign	License category
1.	Africa Broadcasting Uganda Ltd	NTV	Hybrid
2.	Africa Broadcasting Uganda Ltd (Spark TV)	Spark TV	Hybrid
3.	Afromobile Media Limited	Afro Mobile	Online Broadcaster
4.	Albayan Media Ltd	YoTV	Online Broadcaster
5.	Auger Revival Ministries	ABS TV	RFTA Central
6.	Azam Media (U) Ltd	Azam TV	PSP Multiple Stream
			PIP
7.	Bethany Women and Family Hospital Ltd	Bethany TV	Hybrid
8.	Bishop Herbert Kuku & Sons Limited	HGH TV	RFTA- Central
9.	Bloom and Bounty Limited (Spirit Tv)	Spirit TV	Hybrid
10.	Bunyoro Television	Bunyoro TV	Hybrid
11.	Delta Television, Ntake Group of Companies	Delta TV	RFTA- Central
12.	Diamond Communications Limited	BBS TV	Hybrid
13.	Embassy Media (Embassy TV)	Embassy TV	RFTA
14.	Encounter Jesus Worldwide Ministries	Breakthrough TV	Hybrid
15.	Excellent Broadcasting Limited	Excel TV	RFTA- Central
16.	Family Television Limited	Family TV	Hybrid
17.	FUFA Media Services Ltd	FUFA TV	Hybrid
18.	Galaxy FM Ltd (Galaxy TV)	Galaxy TV	Hybrid
19.	Go TV Uganda Limited (Go TV)	GOTV	PIP
20.	Green Monday Technologies Limited	Green TV	RFTA- Central
21.	His Kingdom Broadcasting Services.	Kingdom TV	Hybrid
22.	Index Media Ltd (IT TV)	ITTV	RFTA- Central
23.	Kampala Siti Cable	Kampala Siti Cable	PIP
24.	Kana Promotions Uganda Limited	Wakiso TV	RFTA- Central
25.	Kasasa Broadcasting	KBS TV	Hybrid
26.	King of Kings Ministries/ Good News TV	GNTV	Hybrid
27.	King Solomon Network Television Limited	KSTV	Hybrid
28.	Kooki Broadcasting Services	Kooki TV	RFTA-Central
29.	Life Resurrection Church	Life TV	RFTA Central

Television Stations (Ctd)

No.	Name of Licensee & Call Sign	Call sign	License category
31.	Life Way Church of Christ Limited	Worship TV	RFTA- Central
32.	Manifest Fellowship Limited (Manifest Media Tv -MMTv)	MMTV	RFTA- Central
33.	Multichoice Africa Holdings Bv	DSTV	Landing Rights
34.	NBS Television Limited	NBS TV	Hybrid
35.	NBS Television Limited	NBS Sport	Hybrid
36.	New Vision Printing and Publishing Corporation	Wan Luo TV	Hybrid
37.	NYCE media Services (NYCE Tv)	NYCE TV	RFTA
38.	Mutundwe Christian Fellowship	Eternal Life TV	Hybrid
39.	Rite Television Limited	Rite TV	RFTA- Western
40.	RweTV Business Solutions	RWETV	RFTA- Western
41.	Salam Television Limited (Salam TV)	Salam TV	Hybrid
42.	Select For Fun Limited (STV)	STV	Hybrid
43.	SKY TV Limited transfer to Tayari Media	Sky TV	RFTA
44.	Star Times (U) Ltd	Star DTV	PIP
45.	Success Media International	Success TV	RFTA-Central
46.	Tagy Uganda Limited (Formerly Record Tv)	Tagy Television	Hybrid
47.	T-Media Group Ltd	Meta TV	RFTA- Western
48.	Trinity Redemption Evangelistical International Church T/A Trinity Broadcasting Services Limited	TBS TV	RFTA
49.	Tripai Overseas Agency Ltd (GTV)	GTV	RFTA-Central
50.	Urban Village Developers (Glorious TV)	Glorious TV	Hybrid
51.	Westva Company Limited (Hope Channel)	Hope Channel	Hybrid
52.	Zombo Bethany Mechanical Limited (West Nile TV)	West Nile TV	Hybrid
53.	Ark Television Limited	Ark TV	Hybrid
54.	New Vision Printing and Publishing Corporation	Bukedde TV	Hybrid
55.	Impact Media Consortium Limited	Dream TVRFTA	RFTA
56.	Makerere Christian Foundation (Gugudde TV)	Gugudde TV	RFTA
57.	Salt Television Limited	Salt TV	Hybrid
58.	Radio Gamba Nokora Limited	Gamba Nokora TV	Hybrid

Television Stations (Ctd)

No.	Name of Licensee & Call Sign	Call sign	License category
59.	Multichoice Uganda Limited DSTV	Multichoice	Subscriber Management Services
60.	Christian Life Ministries	Now TV	RFTA-Central
61.	Dove Television Limited	Inspire TV	RFTA-Central
62.	The What Network (TWN TV)	TWN TV	RFTA-Central
63.	CRK Planet (Uganda) Limited	CRK TV	RFTA
64.	Sanyuka Television Limited	Sanyuka TV	Hybrid
65.	Tripai Overseas Agency Ltd	GTV	RFTA
66.	Television one Limited	Television one	RFTA -Central

FM Radios

S/N	LOCATION	NAME OF LICENSEE	CALL SIGN	FREQUENCY
1.	Pader	ABC Children's Aid Ltd	Rapa Rackoko	88.3
2.	Kampala	Monitor Publications Limited	K-FM	93.3
3.	Kabale	Abundant Hope services Media Limited	Hope Radio	102.6
4.	Arua	Access Broadcasting Services	AA City Radio	96.3
5.	Gulu	Acholi Community Empowerment Initiative Ltd	ABS FM	106.8
6.	Kyangwali	Action Africa Help	Kyangwali Community Radio	102.6
7.	Mubende	Africa FM Limited	Radio Simba	92.1
8.	Kampala	Africa Bible University	ABC Radio	99.3
9.	Kampala	Africa FM Limited	Radio Simba	97.3
10.	Moroto	Akica FM Radio Limited	Akica FM	104.7
11.	Jinja	Apex Promotions Limited	Apex FM	103.5
12.	Bugiri	Apex Promotions Limited	Eastern Voice	102.3
13.	Moyo	Arua Catholic Diocese	Radio Pacis	104.8
14.	Arua	Arua Catholic Diocese	Radio Pacis	90.9
15.	Arua	Arua Catholic Diocese	Radio Pacis	94.5
16.	Gulu	Arua Catholic Diocese	Radio Pacis	101.4
17.	Kwania	Atedero FM Limited	Atedero FM)	91.8
18.	Moroto	Ateker Moroto FM Ltd	Ateker FM	88.7
19.	Online	Audience Foundation (U) Ltd	Radio Acorn	Online
20.	Adjumani	Aulogo Media Services Ltd	Aulogo FM	107.8
21.	Obongi	Aulogo Media Services Ltd	Aulogo FM (Repeater)	103.8
22.	Mbale	Baptist International Mission of Uganda	Truth Radio	105.3
23.	Gulu	Baptist International Mission of Uganda	Calvary Radio	105.3
24.	Kampala	Best Broadcasting Services Limited	NRG Radio	106.5
25.	Kanungu	Bethel Kael Enterprise Limited	Bethel FM	New
26.	Buliisa	Biiso FM Limited	Biiso FM	97.8
27.	Rukungiri	Boona FM Ltd	Boona FM	91.8
28.	Arua	Born Free Technologies Network	Nile FM	94.1
29.	Kyegegwa	Britop (U) Ltd	Britop FM	98

FM Radios (Ctd)

S/N	LOCATION	NAME OF LICENSEE	CALL SIGN	FREQUENCY
30.	Kampala	Buddu Broadcasting Services Ltd	Buddu FM	95.5
31.	Masaka	Buddu Broadcasting Services Ltd	Buddu FM	98.8
32.	Kakumiro	Bugangaizi East Development Agency	Amazon Radio	97.2
33.	Kampala	Bugisu Cooperative Union LImited	BCU FM	100.6
34.	Bundibugyo	Bumate Trading Company Ltd	Development FM	94.2
35.	Masindi	Bunyoro Broadcasting Services	BBS FM	98.2
36.	Bushenyi	Bushenyi FM Limited	BFM	92.3
37.	Jinja	Busoga Inter district Adventist development Organisation (BIDADO)	Maranatha FM	104.7
38.	Jinja	Busoga One Radio Limited	Busoga one	90.6
39.	Kazo	Capacity Services Limited	Kazo FM	97.8
40.	Masaka	Capital Radio (2015) Ltd	Beat FM	91
41.	Kampala	Capital Radio (2015) Ltd	Beat FM	96.3
42.	Arua	Capital Radio (2015) Ltd	Capital FM	92.7
43.	Fort Portal	Capital Radio (2015) Ltd	Capital FM	89.4
44.	Kampala	Capital Radio (2015) Ltd	Capital FM	91.3
45.	Gulu	Capital Radio (2015) Ltd	Capital FM	96.9
46.	Mbale	Capital Radio (2015) Ltd	Capital FM	90.9
47.	Mbarara	Capital Radio (2015) Ltd	Capital FM	88.7
48.	Kampala	Capital Radio (2015) Ltd	Kiis FM	100.9
49.	Masaka	Central Broadcasting Services	CBS Emandusso Repeater	87.7
50.	Masaka	Central Broadcasting Services	CBS Eyobujjaja repeater	89.9
51.	Kampala	Central Broadcasting Services	CBS Emmandusso	89.2
52.	Kampala	Central Broadcasting Services	CBS Eyobujjaja	88.8
53.	Kampala	Christ FM Limited	Christ FM	91.6
54.	Fort Potal	Christian Life Ministries	Gold FM	93.3
55.	Kampala	Christian Life Ministries	Kampala FM	99.6
56.	Mbarara	Christian Life Ministries	Link FM	107
57.	Kitgum	Christian Life Ministries	Pol FM	100.7

FM Radios (Ctd)

S/N	LOCATION	NAME OF LICENSEE	CALL SIGN	FREQUENCY
58.	Masaka	Christian Life Ministries	Top Radio	96.2
59.	Mbale	Christian Life Ministries	Top Radio	104.9
60.	Iganga	Christian Life Ministries	RFM	91.1
61.	Kampala	Christian Life Ministries	Top Radio	89.6
62.	Online	Creative Radio Solutions	RX Radio	Online
63.	Kitgum	Crown Media Services Uganda Ltd	Crown FM	99.2
64.	Lira	Cue Investments Limited	Q-FM	94.3
65.	Soroti	Delta FM Radio Ltd	Delta FM	97
66.	Kasese	Diocese of Kasese	Kasese Guide Radio	100.5
67.	Kabale	Diocese of Kigezi community Development limited	DOK FM	96.2
68.	Kasese	Diocese of South Rwenzori	Messiah Radio	97.5
69.	Lira	Dokolo FM Limited	Dokolo FM	102.4
70.	Kampala	Dynamic Broadcasting Services	Spirit FM	96.6
71.	Kampala	East Africa Television Limited	East Africa Radio	99
72.	Mbale	Ebenezer Radio 98 Multi-Media Ltd	Ebenezer FM	98
73.	Kotido	EKO FM ltd	Eko FM	91.2
74.	Mbale	Elgon Beverages Limited	Time FM	95
75.	Mbale	Elgon Radio Limited	Elgon Radio	95.4
76.	Kibaale	Emambya FM (U) Radio Ltd	Emambya FM	95.4
77.	Kamwenge	Emburara Safari's Limited	Nyumbani FM	106.2
78.	Karuguuza	Emesco FM Limited	Emesco FM	95.6
79.	Alebtong	Estalup Enterprises Limited	Radio North	89
80.	Kotido	Etoil A Karamoja	Etoil Karamoja FM	92.7
81.	Kampala	Family Broadcasting Network Limited	Family Radio	105.3
82.	Amuru	Favor of God Ministries	Favor FM	104.1
83.	Gulu	Favor of God Ministries	Speak FM	89.5
84.	Kampala	Federation of Uganda Football Association ()	FUFA FM	102.1
85.	Kampala	Galaxy Fm ltd	Galaxy FM	100.2

FM Radios (Ctd)

S/N	LOCATION	NAME OF LICENSEE	CALL SIGN	FREQUENCY
86.	Mbarara	Glory FM Limited	Glory FM	106.7
87.	Kyegegwa	Graceland Rural Development Co. Ltd	Kyaka FM Radio	96.4
88.	Mbarara	Greater Afrikan Radio	Life Radio	98.3
89.	Gomba	Greater Kisozi Uganda Ltd	Gomba FM	104.7
90.	Arua	Here is Life	Voice of Life	100.9
91.	Kabale	Hills FM Ltd	Hills FM	100.4
92.	Kampala	His Kingdom Broadcasting Services	Kingdom Radio FM	93
93.	Hoima	Hoima Liberty Limited	Liberty FM	89
94.	Koboko	Homenet Limited	Spirit FM	104.5
95.	Mbarara	Hope in Christ's Power Ministries Ltd	Mercy FM	105.8
96.	Bugiri	Impact Media Consortium Ltd	Impact FM	92.9
97.	Kampala	Impact Media Consortium Ltd	Impact FM	98.4
98.	Masaka	Impact Media Consortium Ltd	Impact FM	101.5
99.	Mbale	Impact Media Consortium Ltd	Impact FM	103.7
100.	Jinja	Impact Media Consortium Ltd	Impact FM	107.6
101.	Moyo	Independent Baptist Ministries	New Life Radio	99
102.	Hoima	Independent Baptist Ministries	New Life Radio	96.2
103.	Kitgum	Ireene Gleeson Foundation	Mighty Fire	91.5
104.	Mbale	Islamic University in Uganda	IUIU FM	93.1
105.	Kitgum	Jambo Media Services	Jambo FM	90.9
106.	Kampala	Jilak Company Limited	Radio City FM	97
107.	SMC	Jogoo FM (SMC) Limited	Jogoo FM	93.8
108.	Fortportal	Jubilee Radio Uganda Limited	Jubilee Radio	105.6
109.	Nakapiripirit	Kadam Enterprises Ltd	Kadam FM	107.6
110.	Kibale	Kagadi Broadcasting Services	Kagadi Broadcasting Services	93
111.	Kamuli	Kamuli Broadcasting Services	Endhuba FM	105.9
112.	Kiruhura	Kamwe Trading Company Ltd	Kiruhura FM	98.6

FM Radios (Ctd)

S/N	LOCATION	NAME OF LICENSEE	CALL SIGN	FREQUENCY
113.	Kanungu	Kanungu Broadcasting Service	Kanungu Broadcasting Services (KBS)	95.4
114.	Kapchorwa	Kapchorwa Trinity Radio Ltd	Trinity Radio	94.1
115.	Kibaale	Karuguza Development Radio Limited	KDR	100.3
116.	Mbale	Katinvuma Broadcasting and General Limited	Signal FM	88.1
117.	Kabale	Kegi Town Media Ltd	K-Town Radio	101.5
118.	Kiryandongo	Kibanda Poverty Alleviation Fund Limited	Kibanda FM	103.2
119.	Madi	King Solomon Investments(U) Ltd	Voice Of Madi	107.5
120.	Masindi	Kings Broadcasting Services	Voice of Bunyoro	93.6
121.	Rakai	Kooki Broadcasting Services Ltd (Former Kalungu Foundation)	Ekisweko -KBS FM	93
122.	Kabale	Kool FM Ltd	Rubanda Tukore FM	89.3
123.	Tororo	Kuju cuts Ltd	TFM	96.4
124.	Kaberamaido	Kumam Broadcasters Limited	Dwanwa FM	102.9
125.	Kamuli	Kyoga Broadcasting Corporation Ltd	Ssebo FM	106.3
126.	Amolatar	Kyoga Media Services	Kyoga FM	New
127.	Soroti	Kyoga Veritas Radio Limited	Veritas Radio	91.5
128.	Agago	Latom Holdings ltd	Radio Wang Ooh FM	93.3
129.	Pader	Luo FM Limited	Luo FM	92.4
130.	Lwengo	Lwengo Community Farmers Association	Lwengo FM	90.4
131.	Rukungiri	Maendeleo Company Limited	Rukungiri Radio	96.9
132.	Bukedea	Mama Bukedea Investments Ltd	MB FM Radio	102.1
133.	Sembabule	Mbabule FM Ltd	Mbabule	101.1
134.	Mityana	Mboona International Limited	Mboona FM	107.6
135.	Kampala	Metro FM Limited	Metro FM	90.8
136.	Kisoro	Metropolitan International University Limited	Metropolitan FM	90.3
137.	Lira	Mini-Max Enterprise Limited	Voice of Gospel	104.4
138.	Kampala	Monitor Publications Ltd	Dembe FM	90.4
139.	Kisoro	Muhabura Investments Limited	Voice of Muhabura	88.9

FM Radios (Ctd)

S/N	LOCATION	NAME OF LICENSEE	CALL SIGN	FREQUENCY
140.	Mukono	Mukono Broadcasting Services	Mukono FM	89.8
141.	Fort Portal	Mutundwe Christian Fellowship Broadcasting Ministry	MCF Radio	96
142.	Iganga	Mutundwe Christian Fellowship Broadcasting Ministry	MCF Radio	103.9
143.	Kampala	Mutundwe Christian Fellowship Broadcasting Ministry	MCF Radio	98.7
144.	Mubende	Mutundwe Christian Fellowship Broadcasting Ministry	MCF Radio	93.5
145.	Masaka	Mutundwe Christian Fellowship Broadcasting Ministry Ltd	MCF Radio	100.7
146.	Mbarara	Mutundwe Christian Fellowship Broadcasting Ministry Limited	MCF Radio	107.7
147.	Masindi	Mutundwe Christian Fellowship Ministry	MCF	96.9
148.	Mbale	Mutundwe Christian Fellowship Transfer from Gold Radio Mbale	MCF Mbale	95.8
149.	Namayingo	Namayingo Media Services Limited	Namayingo FM	91.7
150.	Kampala	Namirembe Diocesan Development Organization	Namirembe FM	93.9
151.	Mbale	Nawajjo Enterprises Limited	Elgon FM	101.4
152.	Kagadi	New Media Communications Ltd	Paradigm FM	100
153.	Bunyoro Sub-Region	New Vision Printing and Publishing Co. Ltd	Kabalega FM	97.7
154.	Kabale	New Vision Printing and Publishing Co. Ltd	Radio West	94.3
155.	Kampala	New Vision Printing and Publishing Co. Ltd	Radio West	95.2
156.	Arua	New Vision Printing and Publishing Co. Ltd	Arua One FM	88.7
157.	Mbarara	New Vision Printing and Publishing Co. Ltd	Bukedde FM	96.6
158.	Kampala	New Vision Printing and Publishing Co. Ltd	Bukedde FM	100.5
159.	Masaka	New Vision Printing and Publishing Co. Ltd	Bukedde FM	106.8
160.	Soroti	New Vision Printing and Publishing Co. Ltd	Radio Etop	99.4

FM Radios (Ctd)

S/N	LOCATION	NAME OF LICENSEE	CALL SIGN	FREQUENCY
161.	Lira	New Vision Printing and Publishing Co. Ltd	Radio Rupiny	98.1
162.	Fort Portal	New Vision Printing and Publishing Co. Ltd	Radio West	91
163.	Mbarara	New Vision Printing and Publishing Co. Ltd	Radio West	100.2
164.	Masaka	New Vision Printing and Publishing Co. Ltd	Radio West	106.6
165.	Kampala	New Vision Printing and Publishing Co. Ltd	XFM	94.8
166.	Gulu	New Vision Printing and Publishing Co. Ltd	Rupiny FM	95.7
167.	Arua	Next Radio Limited	Next Radio	103.4
168.	Kampala	Next Radio Ltd	Next Radio	106.1
169.	Jinja	Nkabi broadcasting Services	Smart FM	89
170.	Jinja	Nkabi Broadcasting Services	Khodeyo FM	89.4
171.	Gulu	Nora Media Group Ltd	Choice FM	92.1
172.	Gulu	Northern Braodacasting Company	Radio King	90.2
173.	Gulu	Nuff Empires Broadcasting Services Limited	Nwoya One FM	New
174.	Omoro	Omoro FM LTD	Omoro FM	97.3
175.	Mbale	Open Gate FM Ltd	Open Gate FM	103.2
176.	Mbarara	Open Sky Investment Limited	Crooze FM	91.2
177.	Jinja	Operation Phillips Uganda Limited	Operation Phillips FM	92.1
178.	Pakwach	Pakwach FM Ltd	Pakwach FM	100.2
179.	Pallisa	Pallisa FM Ltd	Pallisa FM	94.4
180.	Kampala	Pearl of Africa Radio Limited	Pearl FM	107.9
181.	Kampala	Power Fm Limited	Power FM	104.1

FM Radios (Ctd)

S/N	LOCATION	NAME OF LICENSEE	CALL SIGN	FREQUENCY
182.	Kampala	Prime Radio Limited	Prime Radio	91.9
183.	Masaka	Prime Radio Limited	Prime Radio	94.6
184.	Kampala	Radio 4 Ltd	Radio 4	103.3
185.	Masindi	Radio 7 Ltd	Radio 7	100.7
186.	Masaka	Radio 777 Limited Bukomansimbi Community Radio Ltd	Radio 777 Bukomansimbi FM	102.7
187.	Adjumani	Radio Amani Limited	Amani FM	89.1
188.	Ntungamo	Radio Ankole	Radio Ankole	99.3
189.	Lira	Radio Apac Limited	Shine FM	106.5
190.	Lira	Radio Apac Ltd	Apac FM	92.9
191.	Tororo	Radio East Ltd	East FM	100.2
192.	National	Radio Gamba Nokora Limited	Gamba Nokora Radio	Online
193.	Hoima	Radio Hoima Ltd	Radio Hoima	88.6
194.	Lyantonde	Radio Kaaro FM Ltd	Radio Kaaro	103.8
195.	Kamwenge	Radio Kamwenge FM Ltd	Voice of Kamwenge	87.9
196.	Kiboga	Radio kiboga Limited	Kiboga FM 103.9	103.9
197.	Moroto	Radio Management Services Limited	All Karamoja FM	94.7
198.	Lira	Radio Management Services Limited	Radio Lira	95.3
199.	Hoima	Radio Maria Uganda	Radio Maria	90.7
200.	Kampala	Radio Maria Uganda	Radio Maria	103.7
201.	Moroto	Radio Maria Uganda Association	Radio Maria	105.5
202.	Kabale	Radio Maria Uganda Asociation	Radio Maria	100.8

FM Radios (Ctd)

S/N	LOCATION	NAME OF LICENSEE	CALL SIGN	FREQUENCY
203.	Fort Portal	Radio Maria Uganda Association	Radio Maria	104.6
204.	Gulu	Radio Maria Uganda Association	Radio Maria	91.2
205.	Gulu	Radio Maria Uganda Association	Radio Maria	105.7
206.	Masaka	Radio Maria Uganda Association	Radio Maria	94
207.	Mbale	Radio Maria Uganda Association	Radio Maria	101.8
208.	Mbarara	Radio Maria Uganda Association	Radio Maria	105.4
209.	Nebbi	Radio Maria Uganda Association	Radio Maria	90.5
210.	Mbale	Radio One Limited	Radio One	98.9
211.	Nebbi	Radio Paidha Ltd	Radio Paidha	87.8
212.	Kampala	Radio Sapientia Limited	Radio Sapientia	94.4
213.	Mbale	Radio Two Ltd	Akaboozi Kubiri	104.4
214.	Nebbi	Rainbow Media Corporation	Rainbow FM	88.2
215.	Kampala	Record Radio Network	Record FM	97.7
216.	Mbarara	Revival Radio Ltd	Revival FM	93.2
217.	Lira	Rhino Communications Company Limited	Rhino FM	96.1
218.	Tororo	Rock Mambo Radio Limited	Rock Mambo Radio	106.8
219.	Rukungiri	Rukiga FM Limited	Country Radio	87.6
220.	Ibanda	Rwenzori FM LTD	Rwenzori Eiraka Radio FM	89.7
221.	Fort Portal	Salt FM Limited	Salt FM	90.3
222.	Jinja	Salt FM Limited	Salt FM	98.2
223.	Kampala	Salt FM Limited	Salt FM	107

FM Radios (Ctd)

S/N	LOCATION	NAME OF LICENSEE	CALL SIGN	FREQUENCY
224.	Mbale	Salt FM Limited	Salt FM	102.6
225.	Mbarara	Salt FM Limited	Salt FM	95
226.	Mubende	Salt FM Limited	Salt FM	97.5
227.	Kampala	Sanyu FM 2000 Limited	Sanyu FM	88.2
228.	Kayunga	Sauti Media Services Limited	Sauti FM	105.5
229.	Jinja	Sauti Media Services Ltd	City FM	96
230.	Kasese	Seventh Day ADventist Association Of Uganda	Awr Light FM	102.9
231.	Sheema	Sheema Broadcasting Services Ltd	SBS FM	90.1
232.	Nakaseke	SIBCO Limited	Seke FM	107.8
233.	Mityana	Skynet Radio Limited	Sun FM	96.9
234.	Kyotera	Solo Hites Hotel Limited	Kafo FM	93.6
235.	Kampala	Source Broadcasting Services Ltd	Bob FM	92.7
236.	Hoima	Spice Media Services Ltd	Spice FM	89.9
237.	Kyankwanzi	Ssaza Broadcasting Services Limited	Ssaza FM	New
238.	Kampala	Success Media International	Success FM	104.9
239.	Kabale	Super Station Inc Limited	Super FM	104.5
240.	Kampala	Super Station Inc Limited	Super FM	88.5
241.	Masaka	Tal Deliverance Radio Limited formerly Radio two	Akaboozi Ku Biri (Tal Radio	99.1
242.	Mitoma	Tayari Media Limited (Tayari FM)	Tayari FM	94
243.	Kitgum	Tembo FM Limited	Tembo FM	103.5
244.	Soroti	Teso Broadcasting Services Ltd	TBS	87.6

FM Radios (Ctd)

S/N	LOCATION	NAME OF LICENSEE	CALL SIGN	FREQUENCY
245.	Kyenjojo	The registered Trustees of the Seventh Day Adventist Church	Vine FM	92.4
246.	Bukwo	Torasis General Enterprises Ltd	Radio 9	89.1
247.	Tororo	Tororo Broadcasting Network	Rock City Radio	98.4
248.	Kabale	Transfer from Freedom Radio Limited to Mutundwe Christian Fellowship Broadcasting Ministry Limited	MCF Kabale	94.7
249.	Moyo	TransNile Broadcasting Services Ltd	Madada FM/ TBS FM	98.6
250.	Online	Uganda Martyrs University	UMU-ACE Online Radio	Online
251.	Kampala	Uganda Media Women's Association	MAMA FM	101.7
252.	Wakiso	Uganda National Communication for UNESCO	Tiger FM	102.5
253.	Kibaale	Uganda Rural Development and Training Prog	Kibale-Kagadi CommunityRadio	91.7
254.	Yumbe	UNHCR Representation Office in Uganda	Bidi Bidi FM	95.3
255.	Dokolo	Unipol Media Services Ltd	LBS FM Radio	90.3
256.	Kampala	United Christian Center	Innerman FM	107.5
257.	Lira	Unity Investment Limited	Unity FM	97.7
258.	Mbarara	Vision Empire Limited	Vision Radio	89.1
259.	Ibanda	Vision Empire Limited	Vision Radio	104.2
260.	Kampala	Voice of Africa(Uganda Muslim Supreme Council)	VOA	92.3
261.	Tororo	Voice of Busia Ltd- formerly Radio Veros Ltd	Voice of Busia FM	90.2
262.	Kabale	Voice of Kigezi Uganda Limited	VOK	89.5
263.	Oyam	Voice of Lango Ltd	Voice of Lango	100.4
264.	Lira	Voice of Lango Ltd	Voice of Lango	88
265.	Mayuge	Voice of Mayuge Radio Ltd	Your Voice FM	92.5

FM Radios (Ctd)

S/N	LOCATION	NAME OF LICENSEE	CALL SIGN	FREQUENCY
266.	Soroti	Voice of Teso	VOT	88.4
267.	Fort Portal	Voice of Toro Ltd	Voice of Toro	101
268.	Mubende	Waset Communications Network (Afrika Renaissance) Limited	Tropical FM	88.4
269.	Abim	Woebil Communications Limited	Karibu FM	98.3
270.	Bugwere	Radio Bugwere Limited	Radio Bugwere	97.2
271.	Mbale	Gemuba Limited	Bright fm	97.6
272.	Lira	Lira Diocese Media Limited	Radio Wa	89.8
273.	Mbale	Baitu Group Limited	Radio 9	New
274.	Mbale	Step Broadcasting and Communication	Step FM	99.8
275.	Arua	New Vision Printing and Publishing Co. Ltd	Arua One FM	88.7
276.	Moroto	Heritage FM Radio Limited	Heritage FM	New
277.	Mbarara	British Broadcasting Corporation	BBC World News Service	107.3
278.	Arua	British Broadcasting Corporation	BBC World News Service	99.4
279.	Mbale	British Broadcasting Corporation	BBC World News Service	107.3
280.	Kampala	British Broadcasting Corporation	BBC World News Service	101.3
281.	Kiruhura	Nyabushozi FM Limited	Radio 5	99.7
282.	Kapchorwa	Kingoo Cottages (U) Limited	Kingoo FM	New
283.	Jinja	Kiira FM Limited	Kiira FM	88.6

Online Communication Providers

No.	NAME OF LICENSEE	LICENCE NUMBER
1.	The Observer Media Ltd	UCC/ODC/LA/548/248
2.	Palladium Group Ltd	UCC/ODC/LA/548/252
3.	Sml News Ug Limited	UCC/ODC/LA/548/100M
4.	Global Health Economics Ltd	UCC/ODC/LA/548/250
5.	Post Media Limited	UCC/ODC/LA/548/112S
6.	Community Media Network Uganda	UCC/ODC/LA/548/249
7.	Skyline Media & Management Ltd	UCC/ODC/LA/548/248
8.	Wahon Media Services Ltd	UCC/ODC/LA/548/251
9.	Nile Post News Services Limited	UCC/ODC/LA/548/039
10.	Mk News Link	UCC/ODC/LA/548/114
11.	Discovery Sport Limited	UCC/ODC/LA/548/225
12.	Socent Media	UCC/ODC/LA/548/176
13.	Mulengera Media Ltd	UCC/ODC/LA/548/047
14.	Raising Gabdho Foundation	UCC/ODC/LA/548/238
15.	Kenganda Studios Smc Ltd	UCC/ODC/LA/548/213
16.	Chimp Media Ltd	UCC/ODC/LA/548/057
17.	Trumpet Media	UCC/ODC/LA/548/118
18.	The Uhuru Institute For Social Development	UCC/ODC/LA/548/18
19.	Legacy Pearls Africa Ltd	UCC/ODC/LA/548/180
20.	Civic Space Tv	UCC/ODC/LA/548/231
21.	Apt Communications	UCC/ODC/LA/548/70

Online Communication Providers (Ctd)

No.	NAME OF LICENSEE	LICENCE NUMBER
22.	Accord Communications Limited	UCC/ODC/LA/548/254
23.	Youth For Charity Mission International (Yofochm)	UCC/ODC/LA/548/253
24.	Fort Television	UCC/ODC/LA/548/210
25.	Hive Digital Ltd	UCC/ODC/LA/548/207
26.	Masaka Home Based Medical Services	UCC/ODC/LA/292
27.	Alternative Digitalk	UCC/ODC/LA/548/258
28.	Ramj Publications Group Ltd	UCC/ODC/LA/171
29.	Nalufenya Onnovations Ltd	UCC/ODC/LA/169
30.	Events And Places Africa Ltd	UCC/ODC/LA/548/173
31.	Teso Vibez Digital Ltd	UCC/ODC/LA/548/257
32.	Streamline Consults Ltd	UCC/ODC/LA/121
33.	Obulemu Media Initiated Uganda	UCC/ODC/LA/191

Public Institutions

	Activity	FY 2023/2024	FY 2024/2025	FY 2025/2026
1	Internet Connectivity to Secondary Schools	50	85	145
2	Internet Connectivity to Secondary Schools	54	NA	NA
3	Internet Connectivity to Secondary Schools	90	90	90
4	Internet Connectivity to Secondary Schools	NA	NA	85
5	Internet Connectivity to National Libraries/Public Access Centers	30	30	60
6	Wi-Fi Hotspots	3	NA	9
7	Public Access Centers	30	30	25

Sn.	Activity	FY 2023/2024	FY 2024/2025	FY 2025/2026
11	Device Financing	NA	2,720	4,000
12	Devices to underserved Households	4,650	4,500	4,500
14	School ICT Laboratories	85	60	60
15	ICT Labs Repairs	NA	192	200
16	Primary School Pilots	NA	13	13
17	Support to Regional Innovation Hubs	NA	NA	4

Sn	Activity	FY 2023/2024	FY 2024/2025	FY 2025/2026
1	School ICT Textbooks	NA	NA	30,000
2	Employment creation through Digital empowerment - Youth	2,500	1,500	1,500
3	Community Basic Digital Skilling – Women	2,400	2,500	2,500

Public Institutions (Ctd)

Sn	Activity	FY 2023/2024	FY 2024/2025	FY 2025/2026
4	Community Basic Digital Skilling – Elderly	800	1,000	1,000
5	Community Basic Digital Skilling – Rural communities	5,000	6,000	5,000
6	Digital skilling for farmers	5,000	2,400	2,400
Sn	**Activity**	**FY 2023/2024**	**FY 2024/2025**	**FY 2025/2026**
7	Digital inclusion for PWDs	1,000	1,000	1,000
8	Teacher ICT Retooling	750	1,000	1,000
9	Digital Literacy for SMEs	1,000	1,500	1,500

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