



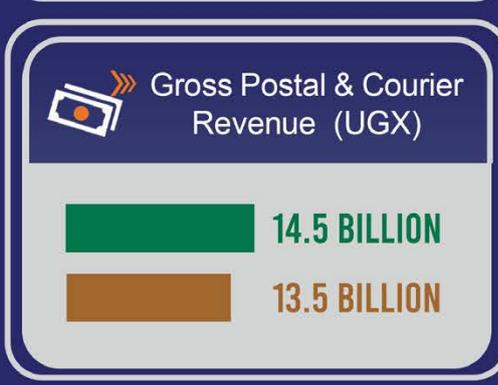
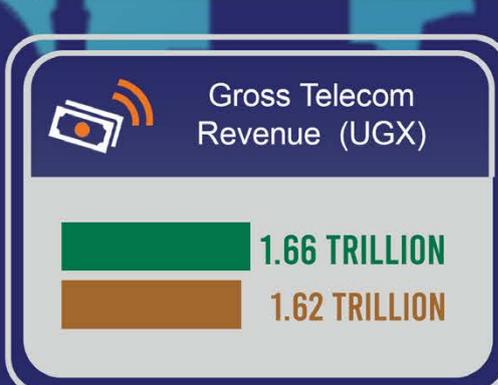
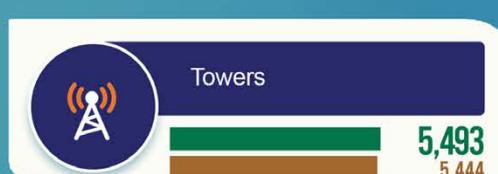
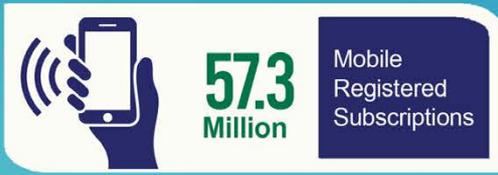
UGANDA
COMMUNICATIONS
COMMISSION



Market Performance Report Q4 2025 (Oct - Dec 2025)



Industry Snapshot December 2025



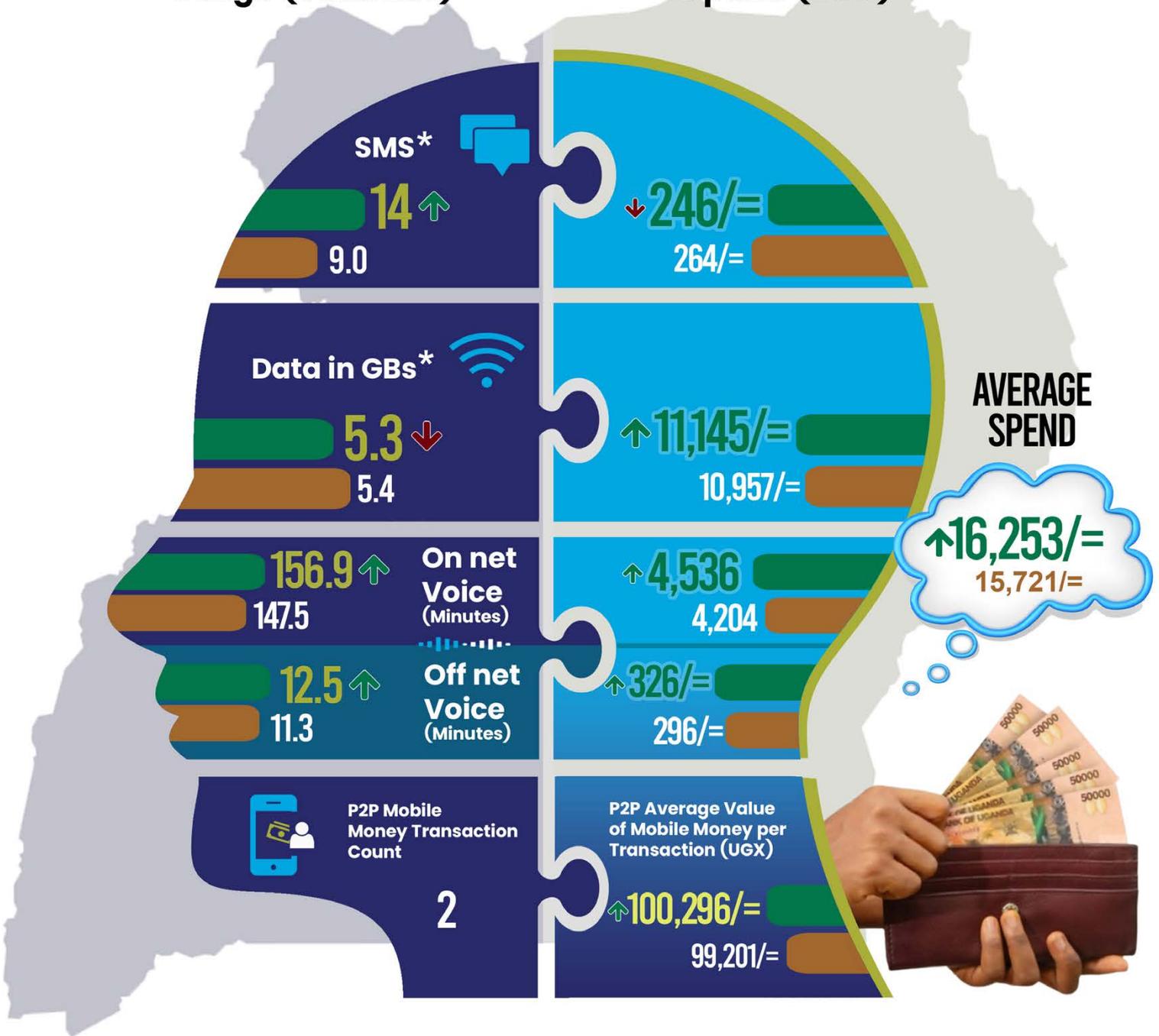
Q4 2025

Q3 2025

December 2025 Average User Profile

Average Monthly Service Usage (Volumes)

Monthly Service Usage Spend (UGX)



● Q4 2025

● Q3 2025



UGANDA COMMUNICATIONS COMMISSION



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

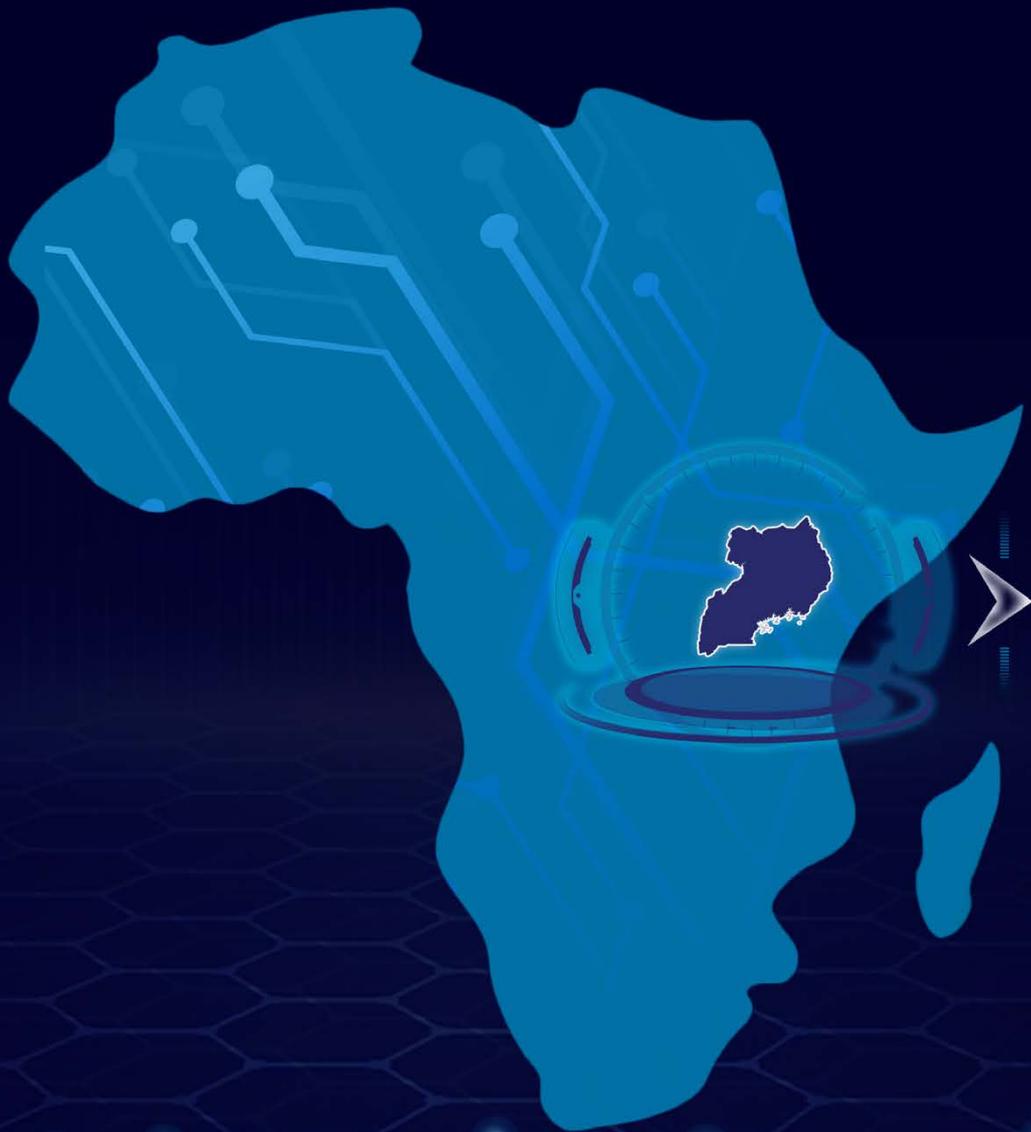
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Introduction

This is a review of the industry performance, trends, and key developments for the fourth quarter of 2025, starting October to December 2025. The report covers:

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

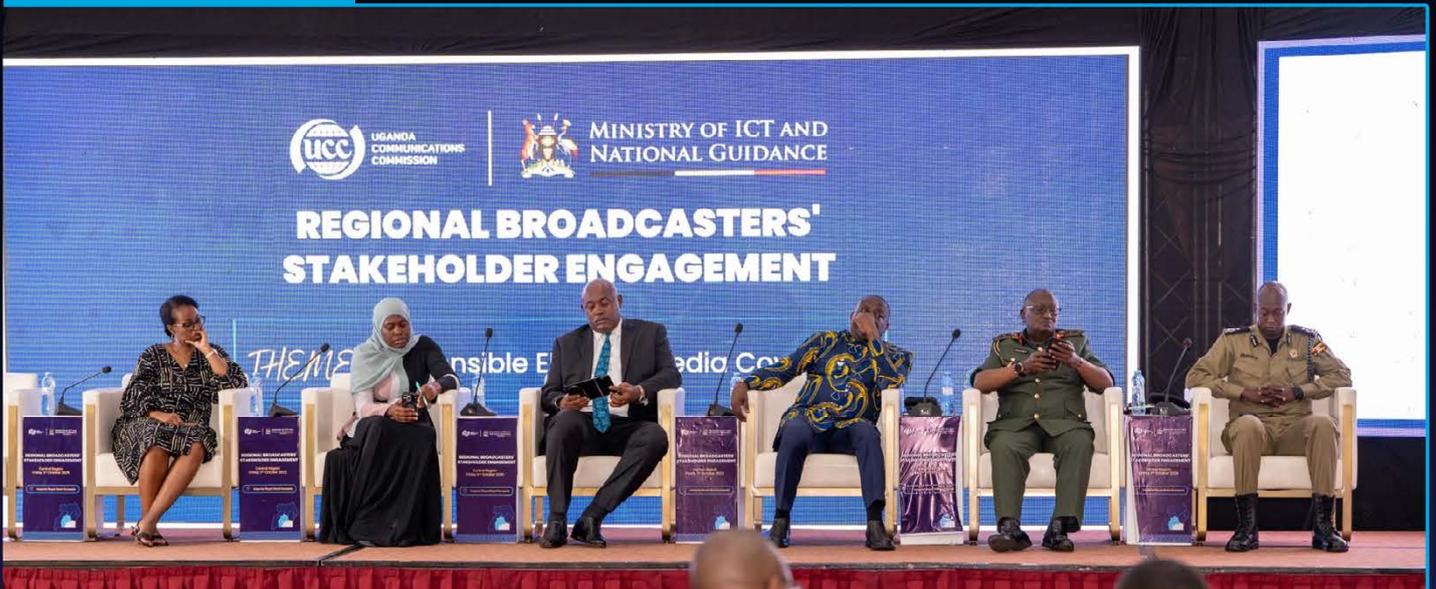
Domestic Highlights



Key Headlines (Oct - Dec 2025)

3rd Oct 2025

UCC warns media on biased election coverage



UCC strongly warned media houses at the Central Regional Broadcasters' Stakeholders Engagement on "Responsible Election Media Coverage". UCC promised tougher rules for fair election reporting to stop misinformation on digital and traditional platforms. Leaders from National Association of Broadcasters – NAB Uganda, including Board Chair Kin Kariisa and Executive Chair Innocent Nahabwe, voiced concerns about media ownership, Electoral Commission voter education, and government access to balanced coverage, whilst praising UCC's guidance on media coverage of the 2026 elections.



Key Headlines Ctd..(Oct - Dec 2025)

Oct - Dec 2025

UCC Wins Five Regulatory Awards



UCC excelled across multiple categories of awards in Q4 2025, securing five major honours that affirmed its leadership in regulation, public service, and stakeholder engagement. UCC won Best Exhibitor in the Regulatory category at the UMA Trade Show, and triple honours at the National Quality Awards including Most Outstanding Government Agency, Executive Director of the Year for Hon. Nyombi Thembo, and Public Relations Officer of the Year for Ibrahim Bbossa. UCC also won the Best Regulatory Body at the KACITA Quality Awards, reflecting its commitment to excellence in digital transformation, consumer protection, and economic facilitation.

Awards won (October - December 2025)



10th October

Best Exhibitor Award
UMA Trade Show



3rd December

Executive Director of the Year
National Quality Awards



3rd December

Public Relations Officer of the Year
National Quality Awards



3rd December

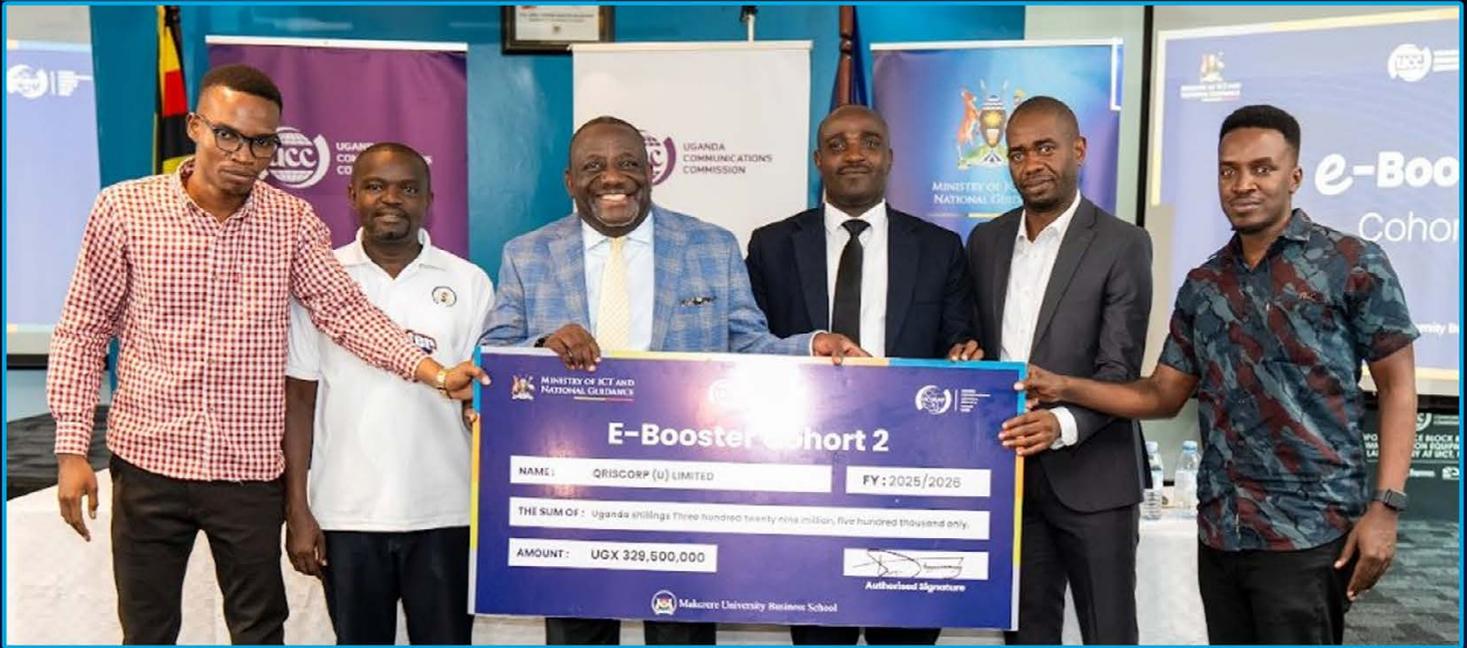
Most Outstanding Government
Agency - National Quality Awards



5th December

Best Regulatory Body
KACITA Quality Awards

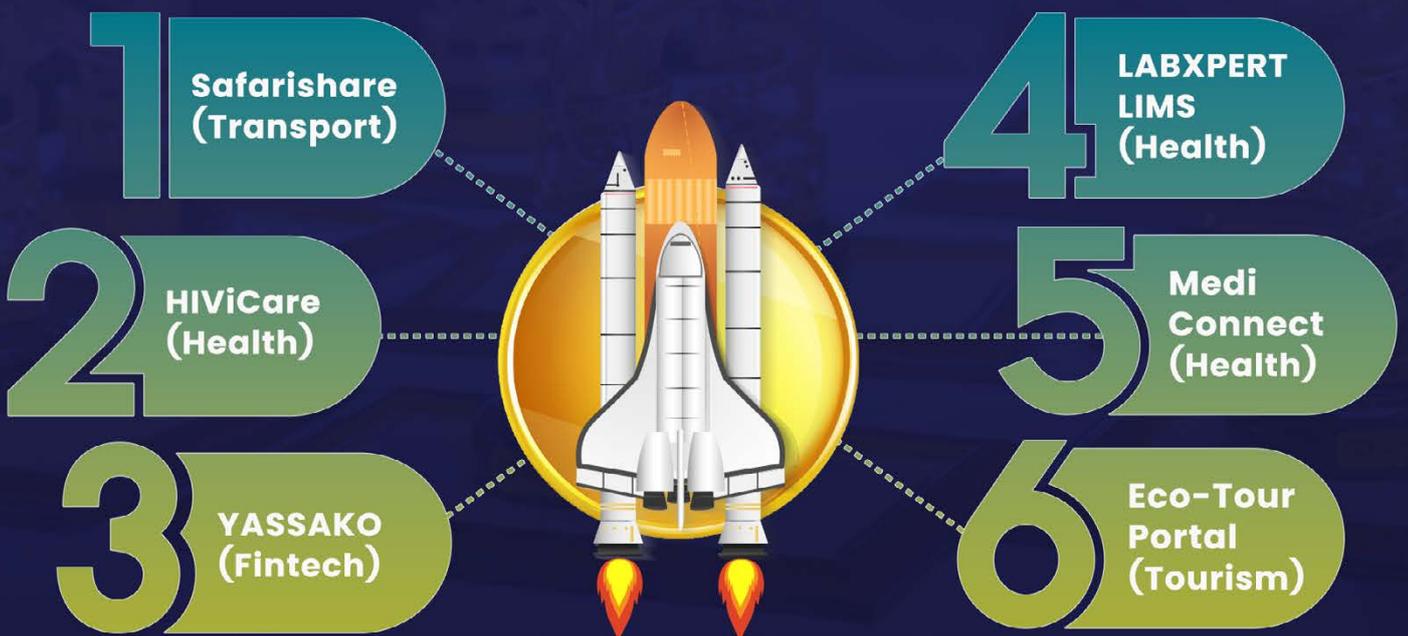




UCC/UCUSAF Launch eBooster Cohort 2

On 13th November 2025, UCC/UCUSAF in partnership with Makerere University Business School, launched eBooster Cohort 2, witnessed by Executive Director Hon. Nyombi Thembo and UCUSAF Director James Beronda. Six innovators were selected to develop digital solutions for underserved communities: Safarishare for smart carpooling, HIViCare for HIV prevention, YASSAKO for energy access, LABXPRT LIMS for laboratory management, MediConnect for healthcare coordination, and e-Business Eco-Tour Portal for tourism MSMEs.

eBooster Cohort 2 Beneficiaries



Oct - Dec 2025



UCC/UCUSAF skills 1,008

1,008 individuals were skilled across nine underserved districts, Kapchorwa (117), Kumi (121), Manafwa (100), Kiryandongo (118), Kisoro (115), Kazo (116), Moroto (108), Kotido (108), and Nakapiripirit (105), in practical digital skills focused on ICT and multimedia content creation using smartphones. The training covered phone-based storytelling, shooting, editing, and production processes to empower authentic community narratives and foster creative expression.

2nd - 3rd October 2025



9th National Conference on Communications (NCC 2025)

UCC in partnership with ISBAT University and Gulu University hosted the 9th NCC convening over 300 delegates from government, academia, industry, civil society, and innovation ecosystems under the theme "Harnessing Digital Innovation to Power Sustainable Local Solutions for Uganda's Development Goals."

2nd - 10th October 2025



UCC participates in UMA Trade Show

UCC set up a stall where it collaborated with the Bank of Uganda to campaign against digital financial fraud under the Beera Steady/Tonfera initiative, while also educating visitors on the dangers of ICT e-waste and the importance of safe disposal. UCC won the Best Exhibitor award in the Ministries, Departments, and Agencies/Regulatory category.

8th October 2025



UCC launches Central Equipment Identity Register

UCC launched the Central Equipment Identity Register system to disable stolen or counterfeit mobile devices across national networks. The platform integrated with international databases to monitor SIM registration and detect fraudulent activities such as IMEI cloning, strengthening regulatory oversight and enhancing public security.

10th October 2025



UCC pledges support for creatives at Next Creaa launch

UCC's Director of Economic Regulation, Content and Consumer Affairs, Julianne Mweheire pledged support for the initiative, which aimed to empower creators and generate up to 1.5 million jobs. She highlighted UCC's complementary efforts, including the Content Development Support Programme, the 70% local content quota, regional production equipment, the Uganda Film Festival, and copyright enforcement.

14th October 2025



UCC launches ICT E-Waste Collection Project

On International E-Waste Day, UCC launched the ICT E-Waste Collection Project to promote responsible management of electronic waste in homes, schools, and offices. Ag. ED Susan Wegoye, emphasised that UCC's role extends to ensuring ICT growth aligns with national goals for environmental protection and technology use.

24th October 2025



UCC hosts final Business Clinic with UgaTunes and AfroMobile

UCC partnered with UgaTunes and AfroMobile to host the final Business Clinic in Kampala, concluding a nationwide series for the creative sector. UCC provided training to help artists navigate digital distribution and rights management, reinforcing its commitment to turning creative work into sustainable digital businesses.

3rd November 2025



UCC participates in Digital Africa Summit

UCC, led by ED Hon. Nyombi Thembo, participated in the Digital Africa Summit Uganda 2025 aimed at bringing together policymakers, industry leaders, and innovators to explore how digitalisation can drive inclusion, entrepreneurship, and economic growth across Africa. Hon. Nyombi Thembo noted that targeted reforms could add 4 million connections, 1.79 million jobs, and UGX 14.6 trillion to GDP by 2030.

4th November 2025



UCC hosts National Final of 3rd Cyber Stars Competition

Through Uganda Computer Emergency Response Team (CERT), UCC hosted the National Final of the 3rd Cyber Stars Competition, welcoming over 60 students from 19 universities. The event enhanced cybersecurity skills, raised awareness, and fostered talent development in line with Uganda's Digital Transformation agenda and National Cybersecurity Strategy.

6th November 2025



UCC Launches Investment Study Validation Workshop

UCC assessed investment needs across telecommunications, broadcasting, and postal sectors, identifying USD 280 million for 95% 4G coverage, USD 8–43 million for digital broadcasting, and USD 45–90 million for postal transformation. An Investment Profile was submitted to the Uganda Investment Authority and MoICT&NG.

7th November 2025



UCC participates in SPICE Project Closing Event

UCC, represented by Geoffrey Sengendo, participated in the SPICE Project closing event on 6th November 2025 at MCI Media Hub in Kabalagala, Kampala. UCC commended the French Embassy and six partners for empowering young creatives in music, animation, gaming, heritage, and audiovisual production through skills in financial management, governance, and entrepreneurial sustainability.

10th November 2025



Ultimate University Quiz Season 2

UCC partnered with the Bank of Uganda and Vision Group for the Ultimate University Quiz Season 3 Grand Finale at New Vision's head office in Kampala. Acting Director Corporate Affairs Emmanuel Muyomba congratulated Vision Group on three seasons that showcase university students' intellectual talent, critical thinking, and communication skills, whilst promoting internet safety, digital engagement, e-commerce, AI, and fintech.

2nd - 6th December 2025



Debate Series 2025 Grand Finale

UCC, in partnership with Debate Institute Africa, held the Grand Finale of the Debate Series 2025 at Greenhill Academy, Kampala. The event engaged 145 top students from 45 schools, generated 5,247 youth ideas on digital safety and related topics, featured site visits to ICT facilities, and reached approximately 677,000 viewers through broadcast and digital platforms. Greenhill Academy won the overall title.

3rd December 2025



UCC hosts Telecom Tax Regime Validation Workshop

UCC convened a validation workshop on the telecom sub-sector tax regime, reviewing findings on how taxes on data, devices, and infrastructure affected affordability and sector growth. Stakeholders such as government officials, operators, financial institutions, consumer groups, and researchers refined recommendations for balanced policies to support digital inclusion and investment.

11th December 2025



UCC participates in Ongea Digital Creators Summit

UCC, represented by Executive Director Hon. Nyombi Thembo, participated in the inaugural Stanbic Ongea Digital Creators Summit in Kampala. The event addressed affordable data, policy support, business formalisation, and monetisation opportunities for creators, with UCC emphasising ethical practices and warning against cybercrimes.

17–18th December 2025



UCC participates in Uganda Media Week

UCC took part in the 7th Uganda Media Week at Four Points by Sheraton, Kampala. Director of Corporate Affairs Fred Otunnu highlighted the importance of independent journalism and constructive dialogue between regulators and media on ethical reporting, press freedom, and compliance ahead of the 2026 elections.

18th December 2025



UCC partners on Content Moderation Symposium

UCC partnered with H&G Advocates for the Content Moderation Symposium at Four Points by Sheraton, Kampala. Executive Director Hon. Nyombi Thembo delivered remarks on the transformative role of digital platforms and AI tools, stressing ethical moderation, responsible influence, and enforcement of the Computer Misuse Act 2022 to protect information integrity and public trust.

28th December 2025



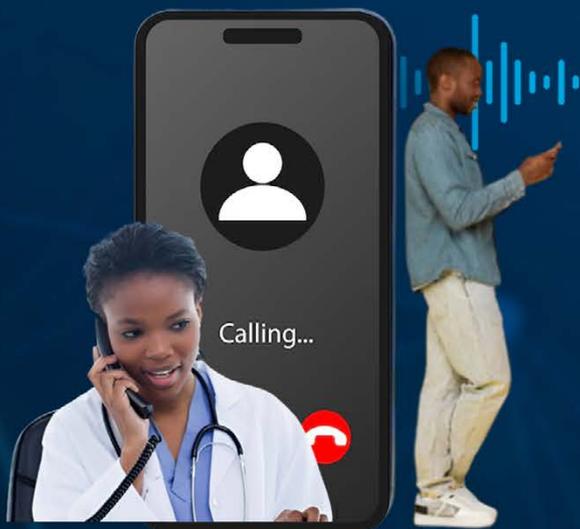
UCC participates in Nile Excellence Awards

UCC, represented by Ibrahim Bbossa, participated in the inaugural Nile Excellence Annual Awards in Tororo, Eastern Uganda. Ibrahim Bbossa noted that talent thrives beyond urban centres, celebrating regional creatives who prioritise integrity, culture, and community impact. Serving also as Guest of Honour, he encouraged youth to pursue diverse creative and entrepreneurial pathways beyond technology to tackle regional unemployment and foster inclusive innovation.

Service Access and Subscriptions



Q4 2025 Subscriptions



47.1 Million

Active Mobile Subscriptions

296 Thousand

Fixed Line Subscriptions

Devices and Terminals



6.1 Million
Basic Phones



32.2 Million
Feature Phones



20 Million
Smart Phones

Active Subscriptions



36.3 Million
Mobile Money

18.5 Million
Mobile Internet

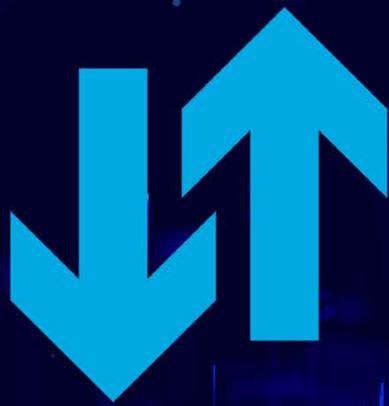
229 Thousand
Fixed Internet

Social Media Subscriptions

As of December 2025



Traffic and Usage



Q4 2025 Traffic



**2.48
Billion**

Mobile Money
Transactions



**332.4
Million**

GigaBytes (GBs)
Downloaded



**18.4
Billion**

USSD
Sessions



**21.1
Billion**

Domestic On
Net Minutes



**1.8
Billion**

Domestic Off
Net Minutes



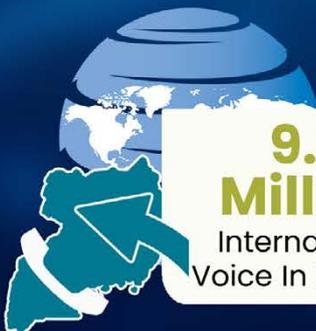
**187.3
Million**

One Net Area
(ONA) In Minutes



**38.2
Million**

One Net Area
(ONA) Out



**9.6
Million**

International
Voice In Minutes

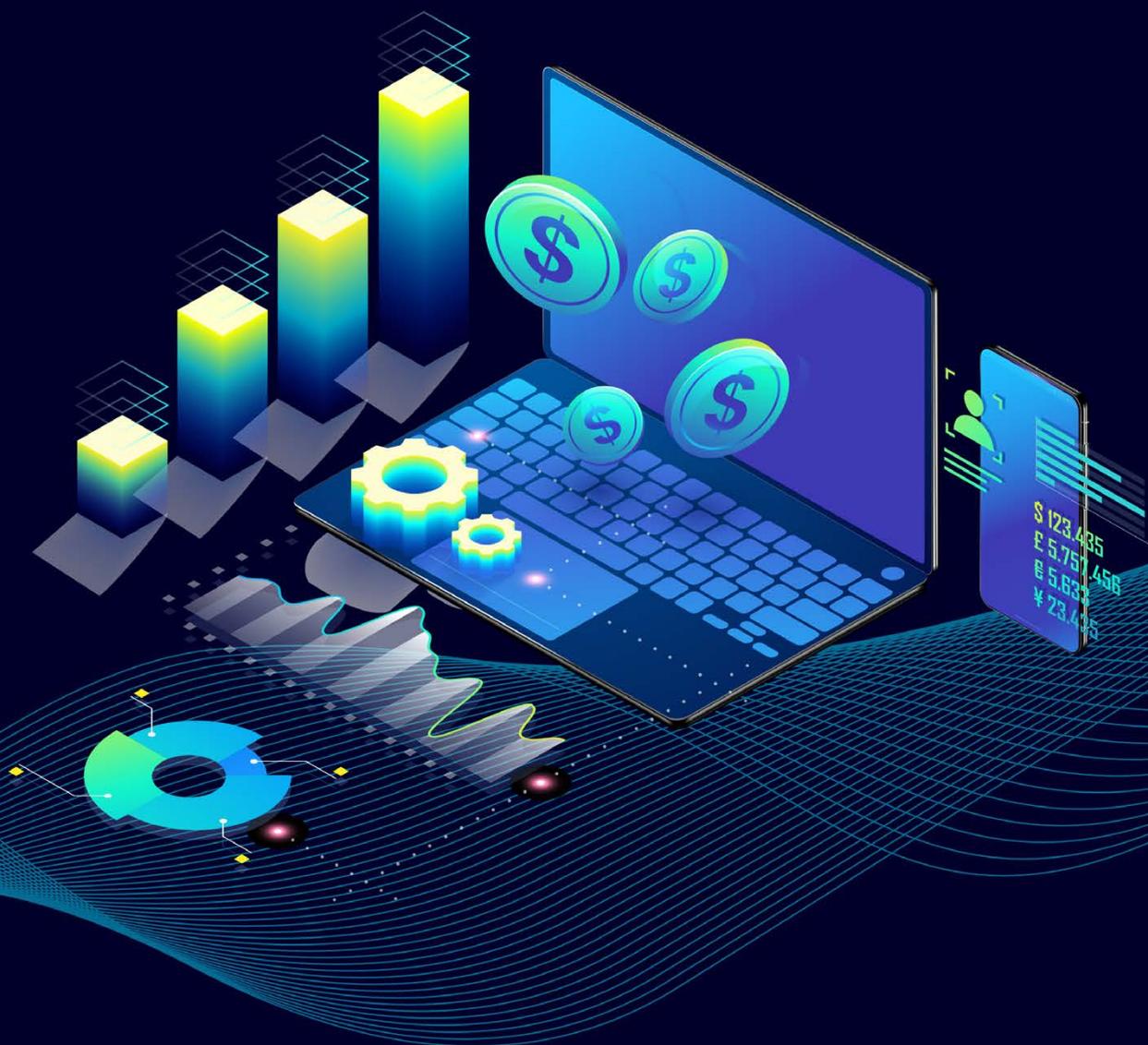


**6.8
Million**

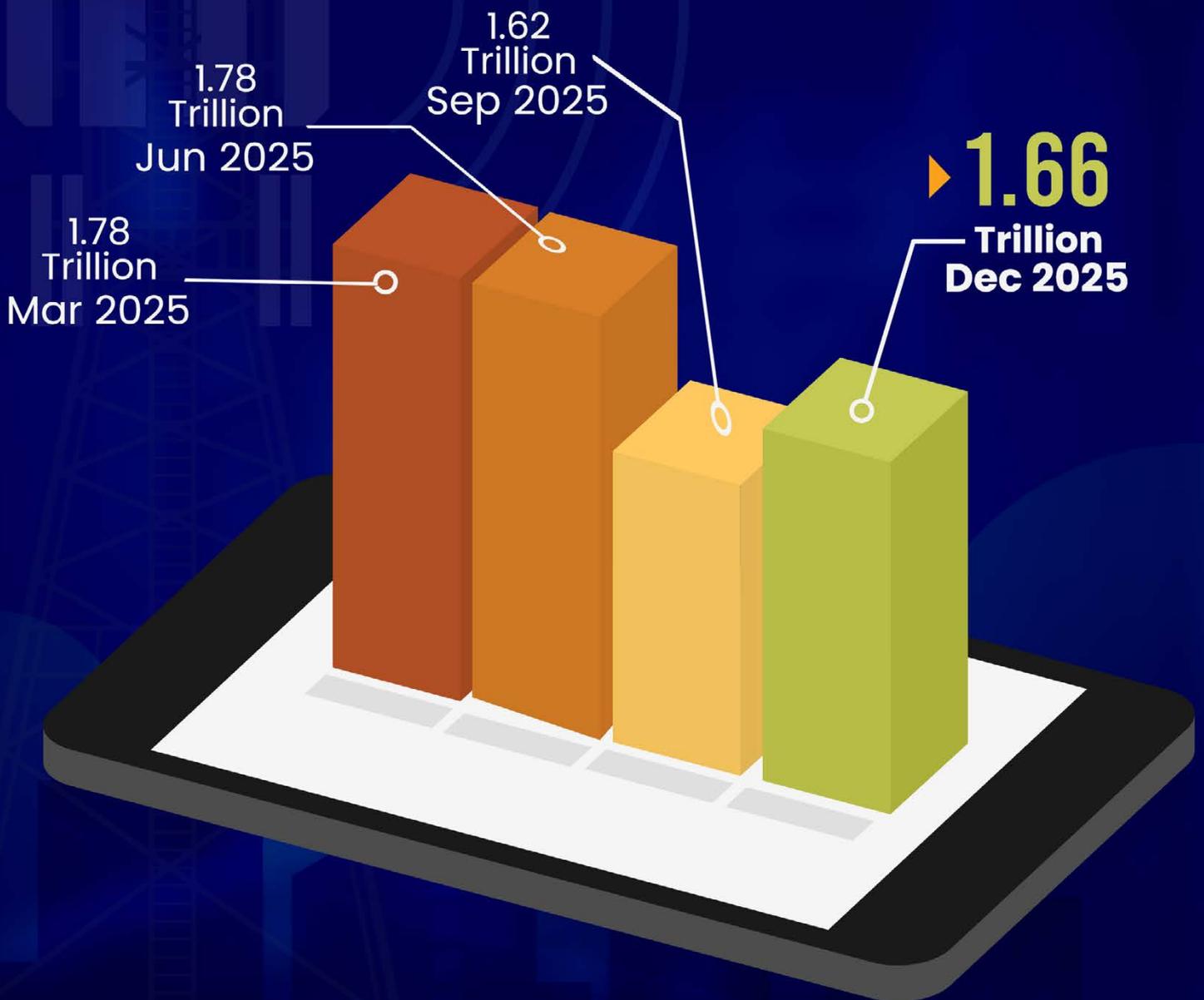
International
Voice Out Minutes



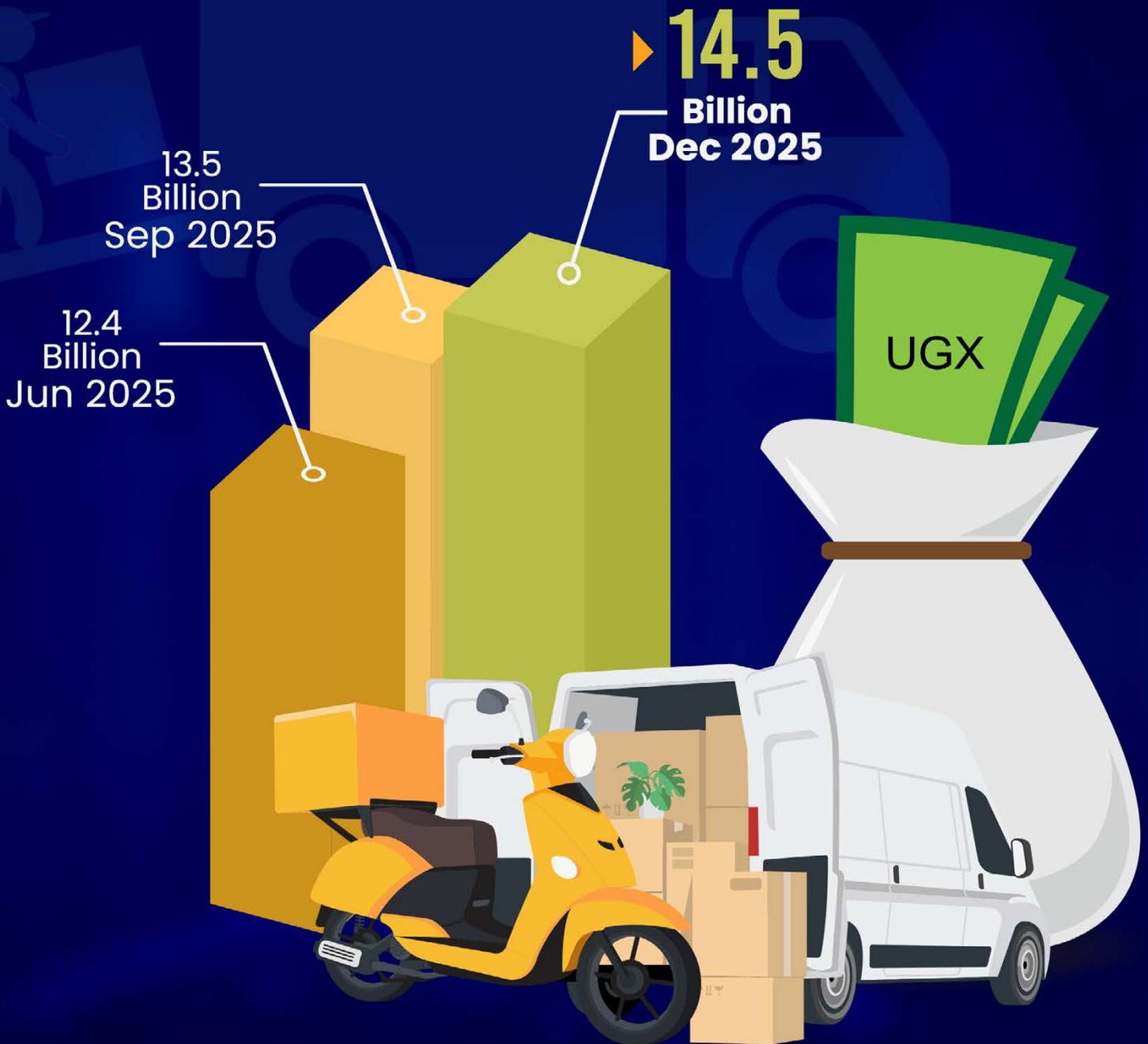
Financial Performance



Q4 2025 Telecom Revenue



Q4 2025 Postal & Courier Revenue



Postal and Courier Sector Highlights



Q4 2025 Postal and Courier Headlines

15-17 Oct 2025

UCC hosts Fourth EACO Post and Logistics Forum



UCC hosted the Fourth Annual EACO Post and Logistics Forum in Kampala, attracting 131 participants to discuss digital transformation and e-commerce in the postal sector. The forum, organized by the East African Communications Organisation (EACO), operated under the theme: *“Elevating Excellence: Enhancing Post and Logistics for Customer and Supplier Satisfaction”*. Some of the key priorities highlighted were investing in digital transformation to enhance efficiency and customer experience, updating policy and regulatory frameworks to support innovation and fair competition, and strengthening institutional capacity and investment for national operators.

22-31 Oct 2025

World Postal Day in Arua City



UCC collaborated with Posta Uganda to mark World Post Day in Arua City through engaging community activities. Build-up events on 22nd – 23rd October 2025 featured interactive radio talk shows and community dialogues to raise public awareness of the postal sector, culminating in a workshop on 31st October 2025 at Heritage Courts Hotel.

Q4 2025 Postal and Courier Overview

Postal Traffic (Mails)

23,755

East Africa
Inbound



11,892

East Africa
Outbound



3,381

Express Mail Service
(EMS) Outbound



423,297

Total Mails
Delivered
Country-wide



235,012

Rest of the World
Inbound

2,450

Express Mail Service
(EMS) Inbound



164,785

Rest of the World
Outbound



Courier Traffic (Parcels)

Posta Uganda
(National
Postal
Operator)



Total Items
Delivered Countrywide

50,189

Domestic
Couriers



Total Items
Delivered Countrywide

673,494

International
Couriers



Total Items
Delivered Countrywide

31,347

Regional
Couriers



Total Items
Delivered Countrywide

8,678

Inter-City
Couriers



Total Items
Delivered Countrywide

113,343

Total Items
Delivered
Countrywide



877,051

Broadcast and Multimedia



Q4 2025 Broadcasting Overview

Country Mapping for The Pay-TV market in Uganda



- DStv Satellite** | Country Wide
- zuku Satellite** | Country Wide
- azamTV Satellite** | Country Wide
- StarTimes Satellite** | Country Wide

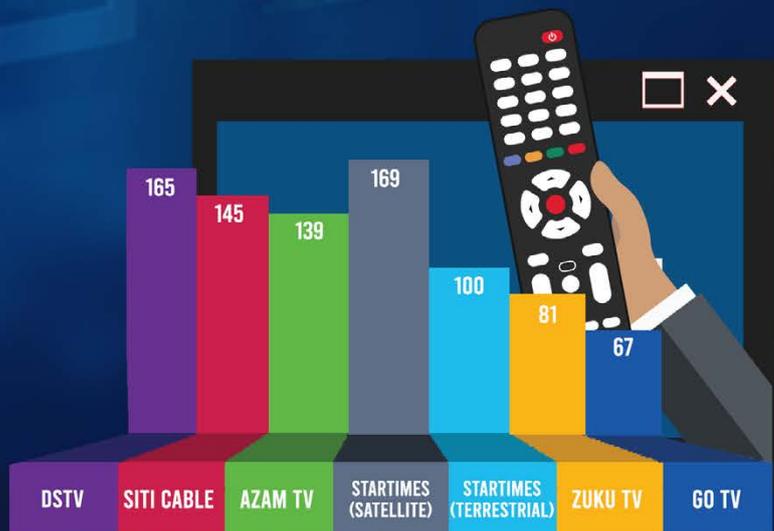
- StarTimes Terrestrial** | Kampala, Wakiso, Mpigi, Masaka, Mbarara, Fortportal, Jinja, Mukono, Kalangala, Luweero, Gulu and Mbale
- GOtv Terrestrial** | Kampala, Jinja, Iganga, Mbale, Lira, Gulu, Arua, Kasese, Mbarara, Masaka and Wakiso
- SIMBA TV Cable** | Kampala & Jinja

PAY TV (DECEMBER 2025)

1.1
Million
Subscribers



Channels Offered

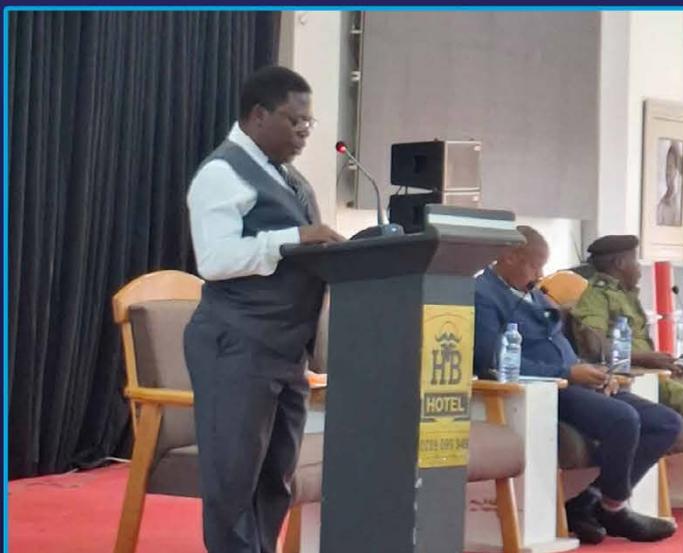


6th – 19th Dec 2025

UCC Engages 152 Broadcasting Stakeholders on Election Coverage



On 6th December 2025, UCC in partnership with the Ministry of ICT and National Guidance, held a dialogue with 67 broadcasters and key stakeholders in Kassanda District, followed by another on 19 December 2025 in Hoima City that drew 85 participants from Uganda's broadcasting sector, for a combined reach of 152 media owners, security officers, and local government officials. The meetings focused on election coverage guidelines and best practices ahead of the 2026 general elections, emphasising media responsibility through compliance with relevant laws, regulations, and professional ethics; balanced, fact-based reporting; impartiality; and responsible journalism to empower voters and strengthen democracy. These engagements underscore UCC's commitment to an informed electorate, where the power of the ballot rests on accurate information, and earned commendation from regional leaders for sensitising stakeholders countrywide.



Kassanda District



48 media representatives and stakeholders

37 security stakeholders and regulators

Hoima City



58 media representatives and stakeholders

9 security stakeholders and regulators

Film and Cinema



Key Headlines (Oct - Dec 2025)

24th Oct 2025

UCC-supported film “Unheard”, Wins at BFF 2025



“Unheard”, directed by Joseph Ken Ssebagala and produced by Polly Kamukama, triumphed at the Bantu Film Festival in Gaborone, Botswana, securing awards for Best Feature Film, Best Director, and Best Writer. UCC played a central role by providing financial backing through its Content Development Support Programme (CDSP), an initiative aimed at nurturing local audio-visual talent and elevating Ugandan stories internationally.

16th Dec 2025

“Karamoja” Triumphs at REFFA Awards 2025



At the REFFA Awards 2025 gala in Accra, Ghana, on 13 December 2025, Uganda celebrated major wins. Eleanor Nabwiso's “Karamoja”, supported by UCC's CDSP, took Best Film in African Language and Best Costume Design for its authentic storytelling. Andrew Ahuura earned Best Sound Design for the Nigerian film 3 Cold Dishes. These achievements highlight Uganda's rising cinematic talent and cross-border collaboration on the African stage.

3rd Oct 2025



Consultative Meeting on Film Production License and Permits

UCC hosted a consultative meeting on the 2019 film production licence and permit regulations, attended by 44 participants in person and 20 online, including key UCC officials. Participants raised concerns over high fees in dollars, and lack of clarity on licences versus permits, calling for reductions to Ugandan shillings, streamlined processes, clearer guidelines, and improved coordination. UCC committed to reviewing feedback and scheduling follow-up consultations.

20th October 2025



RFC 2026 kicks off Sensitization of Creatives in 20 Districts

Under the Regional Film Competition (RFC 2026), UCC engaged and sensitised more than 800 film stakeholders across 20 districts in submissions and productions. Since its launch in 2022, RFC has worked to diversify Ugandan film content, grow local audiences, and strengthen connections between creators across all four regions of the country. The Central region recorded the highest turnout among the four regions.

25th October 2025



UCC rolls out a video series on Copyright in the Digital Age

UCC launched an informative video series titled "Copyright in the Digital Age – What It Means and Why It Matters", aimed at raising awareness among creators, broadcasters, media professionals, and the public. The series explains essential copyright concepts, including the illegality of using someone else's work for commercial gain without permission, the core rights of creatives, and the necessity for copyright authorization to broadcasters.

31st Oct 2025



UCC opens submissions for the 4th Regional Film Competitions

UCC launched RFC 2026 under the theme "Transformation: The Power of Local Stories". Filmmakers were invited to submit short works limited to 35 minutes or less across categories, including short films, animation, documentaries, and TV dramas, with entries accepted online through the FilmFreeway platform. The submission deadline was set for December 31, 2025 and will feature district-based training sessions, public screenings, jury evaluations, and regional award galas.

11th Nov - 25th Nov



UCC Cinema Van Screenings Energise Regional Film Workshops

On 11 November 2025, UCC's cinema van screened Karamoja at Mbale Sports Club after creative engagements that promoted local storytelling. On 17 November, it showed Unheard for free at Kabale Central Market parking yard from 6:30 PM to 8:00 PM and at Mpanga Secondary School in Fort Portal, tying into a youth filmmaking workshop. On 25 November, it screened Karamoja by Eleanor Nabwiso in Masaka City. All screenings aimed to promote the uptake of local content in the film industry.

1st December 2025



UCC opens Submissions for the 13th Uganda Film Festival

UCC launched the call for submissions for the 13th Uganda Film Festival (UFF 2026), following the 12th edition's record 360+ entries, receiving 331 submissions across categories led by Local Short Film (121 entries, 36.60%), Local Feature Documentary (62, 18.70%), and Local Feature Film (38, 11.70%). The deadline for submissions was set for 31st December 2025 on FilmFreeway, highlighting its pivotal role in nurturing talent, and fostering a thriving creative economy through structured support and visibility.

INTERNATIONAL AWARD WINNERS



Offshoot (2023)

Genre: Crime
Director: Steve Ayeny
Award: Best Narrative
Feature DIFF25 -
Cape Verde



The Visit (2025)

Genre: Drama
Director: Serunjogi
Sirage
Award: Best Short
Film (East Africa)
DIFF25 - Cape Verde



Where Is the Head (2024)

Genre: Drama
Director: Tyaba
Charles
Award: Award Winner
DIFF25 - Cape Verde



Fatal (2025)

Genre: Drama
Director: Achura E.
Fredrick
Award: Best Original
Song UNIMA25 -
Nigeria



Fatal (2025)

Genre: Drama
Director: Achura E.
Fredrick
Award: Best
Supporting Female
Actor - Sharon
Kanaalo UNIMA25



Karamoja (2023)

Genre: Drama
Director:
Mathew Nabwiso
Award: Best African
Language Film
REFFA25 - Ghana



Karamoja (2023)

Genre: Drama
Director:
Mathew Nabwiso
Award: Best Costume
Design REFFA25 -
Ghana



Present Past (2024)

Genre: Drama
Director: N. Salma
Bynes
Award: Best Feature
Award ATIFF 2025 -
Online/Global



DIFF25: DjarFogo International Film Festival 2025

UNIMA25: Universal Movie Awards 2025

REFFA25: Regal Film Festival & Awards 2025

ATIFF25: Asian Talent International Film Festival 2025

INTERNATIONAL AWARD WINNERS



Memories of Love Returned (2023)

Genre: Documentary
Director:
Ntare Guma M. M
Award: Visionary
Award KCFYS25 –
Kenya



Memories of Love Returned (2023)

Genre: Documentary
Director:
Ntare Guma M. M
Award: Best Feature
Film (Non Fiction)
KCFYS25 – Kenya



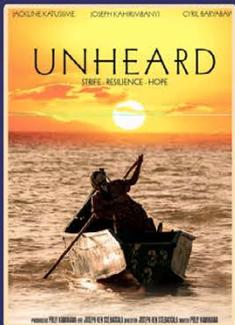
Memories of Love Returned (2023)

Genre: Documentary
Director:
Ntare Guma M. M
Award: Best
Documentary Film
MAAFF25 – Rwanda



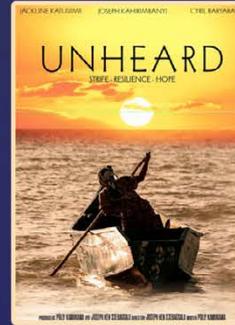
The House Girl (2023)

Genre: Comedy
Director:
Mpiima Johnson
Award: Special
Recognition Award
MOPIFF25 – Global



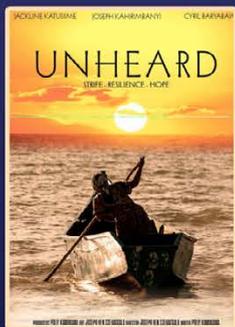
Unheard (2023)

Genre: Drama
Director:
Joseph K. Ssebaggala
Award: Best Feature
Film BFFA25 –
Botswana



Unheard (2023)

Genre: Drama
Director:
Joseph K.
Ssebaggala
Award: Best Director
BFFA25 – Botswana



Unheard (2023)

Genre: Drama
Director:
Joseph K.
Ssebaggala
Award: Best Writer –
Polly Kamukama,
BFFA25 – Botswana



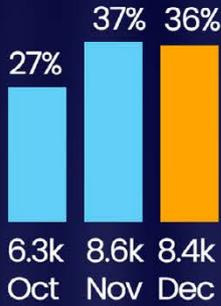
KCFYS25: Kilifi Creek Festival & YORA Summit 2025

MAAFF25: Mashariki African Film Festival 2025

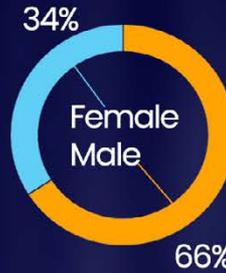
MOPIFF25: Motion Pictures International Film Festival 2025

BFFA25: Bantu Film Festival Awards 2025

CINEMA ATTENDANCE OCT - DEC 2025

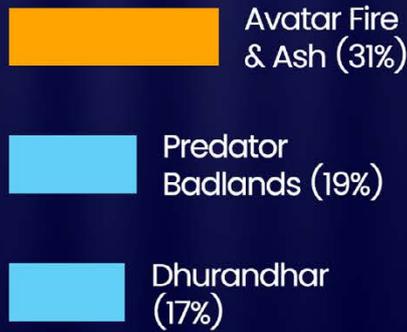


 **36%**
of cinema tickets were sold in Dec 2025



 **66%**
of cinema attendees were male.

Most Popular Movie



Most Popular Day



Saturday 24%
Sunday 20%
Monday 16%





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