UGANDA COMMUNICATIONS COMMISSION

Connected Uganda 2030

Annual Communications Sector Report 2025



Towards an Inclusive Digital Economy - Advancing Child Online Protection



11th February 2025 - Safer Internet Day 2025

The Uganda Communications Commission (the Commission) organised the national Safer Internet Day at UCC House in Bugolobi under the theme, "Too good to be true? Protecting yourself and others from scams online". The event brought together students from Kampala schools, officials from the Ministry of ICT and National Guidance, and other stakeholders. State Minister for ICT and National Guidance Hon. Godfrey Kabbyanga praised the Commission for its commitment to promoting safer online spaces.





Promoting Safer Online Spaces

Uganda is committed to strengthening child online protection through evidence-based policies, effective partnerships, technology and awareness. By connecting our local experiences with global standards, we can contribute to building a safer digital environment for every child.

UCC Board (2025-2028)



Dr. Charity Basaza Mulenga
Board Chair

Tech Visionary | Academic Leader | Engineer



Mr. Bernard M. Katureebe
Board Member

Legal Powerhouse | Arbitration Specialist | Governance Leader



Hon. S. Namabidde Musisi
Board Member

Public Health Champion | Women's Rights Advocate | Former Legislator



Mr. Stephen D. Kabugu
Board Member

Finance Expert | Risk Strategist | Public Sector Veteran

The new Board, led by Chairperson Dr. Charity Basaza Mulenga, pledged to create "a connected, inclusive and prosperous Uganda" through responsible regulatory oversight.



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ICT Infrastructure Strategist | Government Technocrat | Innovator



Hon. G. W. Nyombi Thembo
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Development Economist | Telecom Policy Architect | Proven Public Servant

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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. Justine Kasule Lumumba
Minister of ICT & National Guidance

Foreword by the Minister of ICT and National Guidance.

The National Resistance Movement (NRM) government has, since 1986, guided this nation through successive phases of economic and social transformation underpinned by a single, enduring conviction: that the prosperity of Uganda must be built by Ugandans, for Ugandans, from the ground up. The 2025 Annual Communications Sector Report affirms, with compelling evidence, that digital technology has become one of the most powerful tools through which this conviction is being realised.

The NRM's ideological framework – anchored in patriotism, pan-Africanism, socio-economic transformation, and democracy, finds direct expression in the data presented in this report. When **47.1 million** Ugandans are actively connected on mobile networks, when **35.6 million** citizens participate in the mobile money economy, and when per capita mobile data consumption now exceeds the African continental average, these are not merely sector statistics. They are indicators of a citizenry becoming progressively more empowered, more economically active, and more able to participate in Uganda's development story.

The NRM's commitment to poverty eradication and wealth creation through the Parish Development Model (PDM) is directly advanced by this report's findings. The distribution of **4,112 tablets** to PDM SACCOs across 72 districts, combined with 80% sustained data bundle utilisation post-subsidy, illustrates how digital connectivity is becoming a critical delivery mechanism for state development interventions at the last mile. Mobile money, contributing more than 5% to Uganda's GDP and recording P2P transaction values of UGX 69.90 trillion in 2025, is operationalising financial inclusion in ways that no brick-and-mortar institution could match.

The ideology of Pan-Africanism, too, is reflected into this report. Uganda's leadership at the Universal Postal Union Council of Administration, our Chairmanship of the ITU-T Study Group 5 Regional Group for Africa, and the expanding One Network Area voice and mobile money corridors with our East African Community partners all speak to a Uganda that is not merely inward-looking but is actively shaping the continental digital agenda.

This report is a testament that we are building towards sustainable, safer Digital spaces for the future generations, our children. Child online protection is not a technical footnote to Uganda's digital transformation agenda, it is one of its defining moral obligations. Children and young people represent more than **52%** of Uganda's population and are among the most active users of internet-connected devices. With this online activity, comes inherent risks and vulnerabilities.

The Commission's Child Online Protection Regulatory Framework identifies the four categories of online risk that children face: Content risks (exposure to violent, sexual or hateful material); Contact risks (grooming, harassment, exploitation); Conduct risks (cyberbullying, doxing, peer harassment); and Contract risks (scams, fraud, in-app purchases, and manipulative dark patterns).

Each of these categories demands a regulatory response, and this government is committed to providing one. This framework comes at a time when the evidence alarming. The 'Disrupting Harm in Uganda' study produced by ECPAT, INTERPOL and UNICEF Innocenti found that 1 in 10 internet-using children aged 12–17 had been offered

money or gifts for sexual images or videos, and that close to 215,000 children had sexual images of themselves shared without consent in a single year. Further, ***a Child Online Survey by the Commission in 2020 found that 1 in 5 Ugandan children had encountered sexual images online, that only 9.1% of parents used parental controls, and that 87% of children accessed the internet from home***, often in their bedrooms, unsupervised. These are not abstract statistics. They are a call to action for every Ugandan household, every school, every operator, and every arm of government.

I commend the Uganda Communications Commission for this comprehensive report and for the regulatory stewardship it represents. I invite all stakeholders, operators, investors, development partners, and citizens, to engage with its findings and join us in accelerating Uganda's journey to a fully inclusive digital economy.





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

Message from the Permanent Secretary

The Third National Development Plan (NDPIII) established digital transformation as a cross-cutting enabler. The Fourth National Development Plan (NDP IV), which defines Uganda's development trajectory through the decade, elevates this further: digital infrastructure, digital services, and the digital economy are no longer supportive instruments, they are primary drivers of GDP growth, employment creation, and public service delivery.

The 2025 Annual Communications Sector Report provides the most comprehensive empirical account to date of how far Uganda has progressed against this agenda, and where the critical gaps remain. The Ministry reads this data not as a retrospective, but as a strategic instrument for planning, resource allocation, and policy refinement.

On infrastructure, the report confirms that the foundational investments are yielding results. Uganda's fiber optic network has more than tripled since 2019, reaching **62,941 kilometers** in 2025, a 32% single-year expansion. The national tower count stands at 5,493, with deliberate deployment in the Eastern region and under the TowerCo of Africa rural build programme. Base stations grew by **14%**, the strongest annual performance in three years. These are the physical foundations on which digital transformation is built, and they are expanding at pace.

While, these interventions have together created the infrastructure conditions for Uganda's digital growth, the same connectivity that empowers Uganda's citizens also exposes its children to online risks that were inconceivable a decade ago.

With **18.5 million** mobile data subscribers in 2025, a significant proportion of whom are minors, the Ministry recognises that connectivity without child safety is an incomplete and irresponsible policy outcome.

We have put in place a Child Online Protection Regulatory Framework to provide the governance architecture to address these gaps. It establishes five regulatory pillars; Legislation Review, Awareness and Capacity Building, Enforcement and Accountability, Proactive Monitoring, and Stakeholder Coordination under which specific, time-bound actions will be implemented and measured.

In the framework, we call upon all relevant Ministries, Departments and Agencies to cooperate with the National Child Online Safety Consortium, a multi-stakeholder body chaired by the UCC including the Ministries of ICT and National Guidance, Education and Sports, Gender, Labour and Social Development, Health, NITA-U, the Uganda Police Force, the Directorate of Public Prosecutions, industry associations, civil society organisations, youth representatives and academic institutions.

In fact, every device distributed under PDM SACCOs, every ICT laboratory installed in secondary schools, and every public access centre connected through the Universal Service Access Fund must now be accompanied by child online safety education, parental awareness materials and appropriate content filtering. The Ministry expects annual compliance reporting and will hold institutions accountable for ensuring that digital access translates into safe, empowering experiences for Uganda's children.

The Ministry therefore extends its gratitude to operators, development partners, and other sector stakeholders for their continued collaboration and commitment to advancing Uganda's digital transformation agenda and promoting safe digital spaces across the country. This report documents these experiences, lessons, and achievements to inform future interventions and build on ongoing efforts toward a digitally sustainable Uganda.



Dr. Charity Basaza Mulenga
Board Chair,
Uganda Communications Commission

Message from the Board Chair

The 2025 Annual Communications Sector Report, which the Board is pleased to present, is both a testament to the sector's dynamism and a measure of the Commission's effectiveness as a development-oriented regulator. The Commission's current Strategic Plan was crafted around a clear conviction: that regulation must be forward-looking, evidence-based, and explicitly oriented toward the welfare of Ugandan consumers and the growth of the national economy. The 2025 data validates that strategic orientation across every domain the Commission oversees.

The Commission's infrastructure stewardship is visible in the numbers. The **32% expansion** of Uganda's fiber network to 62,941 kilometers, the 14% growth in base stations to **8,973**, and the rollout of 53 subsidised tower sites to previously unserved sub-counties under the UCUSAF programme collectively represent a communications infrastructure landscape being actively shaped by regulatory intent not merely by commercial logic. The Commission's market monitoring and licensing frameworks have created the conditions in which operators invest with confidence, and in which new entrants, including satellite providers such as Starlink, seek authorisation to participate.

The Commission's competition regulation work, the market definition and market power assessment, and the comprehensive telecommunications costing study demonstrates a regulator that is investing in the evidentiary and analytical foundations necessary for credible, defensible, and competitively neutral intervention. The resulting regulated wholesale reference prices and Mobile Termination Rate determinations directly influenced the **52% growth** in off-net voice traffic observed in 2025, as cross-network calling became more affordable for consumers. This is regulation working as it should: producing tangible consumer benefits through structural market reform.

The Commission's consumer-facing work is equally important to the Board. Quality of Service monitoring in indoor buildings, border towns, and high-traffic public events has moved UCC beyond passive compliance monitoring toward active, environment-specific performance assessment. The integration of crowdsourced Quality of Experience data is a forward-looking initiative that will give the Commission a real-time, citizen-sourced lens on network performance.

We are pleased to note that 2025 marked the year in which the Commission elevated child online protection from a discrete consumer programme to a formal regulatory priority, institutionalized through a dedicated Child Online Protection Regulatory Framework adopted in June 2026. This Framework draws explicitly on Uganda's own evidence base, the 2020 UCC Child Online Survey.

We endorsed the Framework's governance architecture, including the establishment of a Child Online Protection Steering Committee within UCC and a National Child Online Safety Consortium as the external governance body, in recognition that child protection requires coordinated action across the full spectrum of institutions that touch children's digital lives.

The Board is equally encouraged by the Commission's benchmarking of regional and global best practice. We obtained key learnings from Peer and Aspirational regulatory markets. As such, our Child Online Regulatory Framework positions us firmly among these leading jurisdictions.

I therefore invite you to read this report, which highlights the Commission's progress, key achievements, with a strategic focus on advancing child online protection. We trust that the insights presented will foster continued collaboration and collective action toward creating a safer and more secure digital environment for all children in Uganda.



Hon. Nyombi Thembo
Executive Director, UCC

Message from the Executive Director

The 2025 Annual Communications Sector Report is presented at a moment of genuine consequence for Uganda's digital trajectory. Across the telecommunications, postal, broadcasting, and film sectors, the data confirms a sector in structural transition, moving with increasing velocity toward a data-centric, platform-driven, and digitally inclusive communications ecosystem.

The Uganda Communications Commission's mandate is executed at two intersecting levels: responding to the specific connectivity, access, and quality needs of Ugandan citizens and enterprises; and ensuring that Uganda's regulatory environment, institutional positioning, and policy frameworks are aligned with the global standards, norms, and frameworks that govern international ICT development. The 2025 report reflects both levels of responsibility.

Mobile broadband penetration at **39 per 100 inhabitants** reflects structural constraints relating to device affordability, taxation, household income levels, and data pricing. While some of these factors fall beyond the Commission's direct regulatory mandate, the Commission continues to address areas within its remit through telecommunications costing studies, market regulation, and competition-focused interventions. The completed telecommunications market definition and infrastructure costing studies provide the regulatory foundation for cost-reflective pricing interventions, competitive access regimes, and credible determination of Mobile Termination Rates. These are not administrative exercises, they are the instruments through which the Commission influences the structural economics of the sector. through which the Commission influences the structural economics of the sector.

At the global level, Uganda's engagement with the International Telecommunication Union (ITU) remains central to our regulatory legitimacy and our access to global knowledge and standards. Uganda's Chairmanship of the ITU-T Study Group 5 Regional Group for Africa has given both the continent and Uganda a platform to shape international standards on e-waste management, the circular economy, climate resilience, and electromagnetic compatibility in ICTs. The ITU's Facts and Figures 2025, which we reference extensively in this report, confirms that Uganda's mobile broadband consumption at **5.25 GB** per subscriber per month now exceeds the ITU-reported African average of 3 GB per month, marking a significant milestone in the country's digital development.

Uganda's re-election to the Universal Postal Union Council of Administration for the 2025–2029 cycle, securing **129 votes** and ranking third among African candidates, reflects the credibility the country has earned through consistent, principled participation in global postal governance.

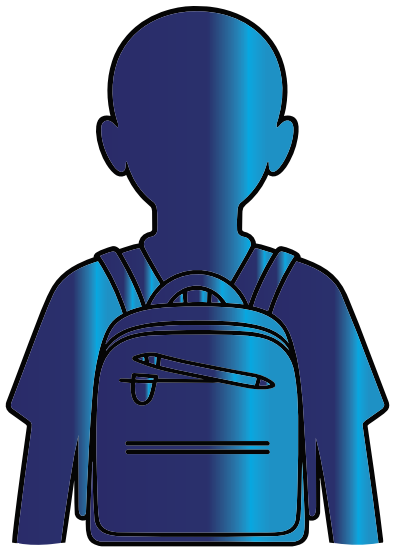
> Mobile broadband penetration at **39 per 100 inhabitants** reflects structural constraints in device affordability and data pricing that the Commission is addressing through its costing and market regulation work.

The Commission's most consequential institutional development of 2025–2026 is the adoption of the **Child Online Protection (COP) Regulatory Framework 2026.** This Framework translates regulatory intent into enforceable obligations. Under the Uganda Communications Act, Cap. 103, the Computer Misuse Act, the Data Protection and Privacy Act, 2019, and the Children Act, Cap. 62, the Commission is mandated to coordinate child online protection across Uganda's digital ecosystem, working collaboratively with government agencies, industry, civil society, and international partners to create a safer online environment for children.

As the communications sector continues to evolve, the Commission remains committed to evidence-based regulation, innovation, consumer protection, and the promotion of a competitive, resilient, and inclusive digital economy. The findings presented in this report provide an objective assessment of the sector's performance while highlighting the opportunities and priorities that will shape Uganda's communications landscape in the years ahead.

I therefore invite policymakers, operators, investors, development partners, researchers, academia, and the wider public to read the 2025 Annual Communications Sector Report. We trust that the analysis and insights contained in this report will support informed decision-making, stimulate constructive dialogue, and strengthen collective efforts to build a secure, inclusive, and globally competitive communications sector that advances Uganda's national development aspirations.

The Commission's most consequential institutional development of 2025–2026 is the adoption of the **Child Online Protection (COP)** Regulatory Framework 2026.





Safeguarding children in a digital economy

As the communications sector continues to evolve, the Commission remains committed to evidence-based regulation, innovation, consumer protection, and the promotion of a competitive, resilient, and inclusive digital economy.



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

Message from the Director Economic Regulation Content and Consumer Affairs

The 2025 Annual Communications Sector Report documents a year of significant market movement across all four communications domains. But behind every market statistic in that report stands a human reality that the Commission can no longer treat as incidental: Uganda's children are now among the most active and most exposed participants in the digital economy. From the perspective of economic regulation, content oversight, and consumer affairs, the most important question is not simply what happened in the market, but what it means for the safety of the youngest Ugandans who inhabit it.

The scale of children's digital immersion is written into the sector's own performance data. Mobile data traffic crossed **one billion gigabytes** annually in 2025, per-subscriber consumption at **5.25 GB per month** now exceeds the African average.

The MTN–Airtel network-sharing agreement of March 2025 and the continued expansion of the UCUSAF tower programme are accelerating rural coverage extending connectivity to communities where children are often the household's most digitally fluent members, yet where parental digital literacy and protective supervision are weakest. Every gigabyte of growth and every new tower is, simultaneously, an expansion of the environment in which Ugandan children learn, socialise, and are placed at risk.

Nowhere is this duality sharper than in the platforms children actually use. TikTok's data traffic **grew 85%** in 2025, reaching **319.67 million gigabytes**, while Snapchat recorded 56% subscriber growth. These are not merely market statistics. They represent platforms that have become deeply embedded in the daily lives of Uganda's young people.

It is against this backdrop that our work in child online protection sits squarely at the intersection of our three core mandates:



- *Economic Regulation*
- *Content Governance*
- *Consumer Affairs*

A child harmed online is a consumer harmed, a content-governance failure, and where platform business models profit from that harm, an economic-regulation concern.

The Commission enters 2026 with a clear conviction: a communications sector that is unsafe for children is not, in any meaningful sense, a successful one. Child online protection is therefore not a constraint on market growth, but a condition of legitimate market growth.

The same evidence-based, consumer-centred regulatory posture that revised Mobile Termination Rates, enabled infrastructure sharing, and sustained a pro-investment broadband environment will now be brought to bear on the design choices, content flows, and accountability gaps that place children at risk.

The market movements of 2025 confirm that Uganda's communications sector responds to regulatory leadership. Our responsibility is to ensure that leadership protects those least able to protect themselves.

It is my pleasure to present to you the Uganda Communications Sector Market Report 2025 which among others presents the market dynamics, service-line performance, consumer trends, and platform-level traffic data that shape our children's digital environment. Readers are encouraged to engage with the Report in full: it documents the telecommunications, data, mobile money, postal and courier, and broadcasting markets whose growth defines both the opportunity and the exposure of Uganda's connected generation. Understanding that market is the first step in protecting the children who now live within it.



A child harmed online is a consumer harmed

The Commission enters 2026 with a clear conviction: a communications sector that is unsafe for children is not, in any meaningful sense, a successful one. Child online protection is therefore not a constraint on market growth, but a condition of legitimate market growth.

Executive Summary

Uganda's Telecommunication, Broadcast, Post and Courier space has yet again posted significant growth in 2025, driven by sustained demand for data services, continued expansion of mobile financial services, record infrastructure investment, and strategic regulatory stewardship across the value chain. Across every market from the tower on the distant hillside to the fiber threading into a Kampala home for the first time, increased online content, from the film winning an award on an international stage to the parcel completing its last-mile journey on the back of a courier boda boda, 2025 was a year that confirmed the sector's position as the most dynamic and consequential in Uganda's economy.

Total telecommunications revenues crossed **UGX 6.8 trillion**, continuing the compound growth trajectory that has characterised the last five years. Data, fintech and voice all posted strong growth during the year, with data now firmly established as the sector's primary revenue engine. Both MTN Uganda and Airtel Uganda delivered strong returns for shareholders on the Uganda Securities Exchange, reflecting investor confidence in the sector's long-term trajectory.

On the infrastructure front, the fiber network grew faster than it ever has, extending well beyond the commercial corridors of Kampala into peri-urban districts, secondary towns, and through government-backed investment into the Northern region where communities in Gulu, Kotido and the Karamoja sub-region are now being connected for the first time. The tower network continued to grow, with the Eastern corridor recording the fastest regional expansion as operators pushed capacity along the Jinja–Tororo–Mbale axis. Perhaps the most strategically significant infrastructure development of the year was the network-sharing agreement signed between MTN Uganda and Airtel Uganda in March 2025. In a sector defined by competition, two of our largest operators chose to cooperate by pooling towers, base stations, fiber and radio access equipment to reduce duplication and extend coverage more efficiently into rural Uganda.

The post and courier sector has navigated its ongoing structural transition with considerable agility. E-commerce is fundamentally reshaping both the post and courier segments, driving demand for faster, more flexible, more urban-focused delivery solutions. Total courier weight handled grew during the year, with outbound volumes growing particularly strongly. Our post and courier traffic is largely driven by robust trade flows along the East African Community corridor, highlighting the critical role of regional integration in sustaining Uganda's logistics economy. Beyond the region, our global business partners in Asia, Europe and the Middle East continue to contribute substantially to international courier volumes, reflecting Uganda's deepening connectivity to global supply chains.

The emergence of digital-native last-mile operators into the formal regulatory framework was a landmark development of 2025. Platforms like Glovo, SafeBoda and Yellow Bird built on smartphones and the boda boda networks that move through Uganda's cities are now captured in our reporting framework for the first time, making visible a layer of delivery activity that was always there but previously not recorded and therefore not measured.

Their inclusion reflects the Commission's commitment to ensuring that regulation evolves with the market it governs, rather than lagging behind it.

The TV and multimedia space continues to present new opportunities and challenges in equal measure. The growth of over-the-top media platforms has created new distribution and consumption channels for content creators and audiences alike, and we welcome the expanding number of Ugandan creators who are licensing and monetising their work on platforms like YouTube and Meta.

This is a development that the Commission views with genuine enthusiasm. It is evidence of a creative economy finding its commercial footing in the digital world. At the same time, we are clear-eyed about the

challenges that OTT growth brings: the erosion of traditional broadcast revenue models, the complexities of regulating platforms that operate across jurisdictions, and the persistent challenge of piracy and child on-line protection concerns, presenting a global concern that Uganda is not insulated from. The defining theme of the 2025 annual report heightens emphasis on child online protection which has emerged as a cornerstone of UCCs regulatory and consumer protection agenda. Its focus mirrors the rapid expansion of digital access across Uganda enabling greater connectivity for education, information and economic participation. These advacements also amplify exposure to online risks for children. The UCC has taken a stand to prioritize strategies that promote the responsible and safe use of these digital platforms.

Uganda's film and creative industries had their finest year on record in 2025. International nominations more than doubled and awards won reached their highest level in the Commission's four-year review period, reflecting the cumulative returns of sustained investment in training, production support, and platform development.

Amidst all of the above, Uganda's Post, Telecom and Multimedia space remains arguably the most vibrant sector in the national economy – sustaining hundreds of thousands of direct and indirect jobs, attracting meaningful new investment annually, and serving as a critical business enabler across agriculture, health, finance, education, government and commerce.

As we look ahead, the Commission does so with a clear sense of what has been achieved and an equally clear sense of what remains to be done. Universal coverage is not yet a reality. The quality of connectivity in rural Uganda has not yet matched the ambitions of the National Broadband Policy. The affordability of broadband services for the lowest-income households remains a work in progress. The regulatory frameworks governing broadcasting and OTT platforms are due for modernisation.

These are the challenges that define the Commission's forward agenda, and the sector's performance in 2025 gives us every confidence that Uganda has the infrastructure, the investment appetite, and the institutional capability to meet them.

ICT remains a foundational pillar and critical enabler of Uganda's socioeconomic transformation and national development, alongside other fundamentals of energy, transport and human resources. 2025 has demonstrated, once again, that this sector delivers on that role – and that the best of what it can offer is still ahead of us.





Industry Highlights

Uganda's communications sector recorded strong and broad-based performance in 2025, affirming its central role as an engine of national economic development, digital inclusion, and social connectivity. This report distils the key findings across the four principal reporting domains of the Annual Communications Sector Report: Telecommunications, Post and Courier, Film and Creative Industries, and Broadcasting and Multimedia Services.

The sector's performance in 2025 was shaped by significant infrastructure investment, regulatory innovation, evolving consumer behaviour, and the accelerating penetration of digital services. Across all domains, 2025 marked a decisive shift from legacy analogue services toward data-centric, digitally enabled ecosystems – a structural transition that presents both commercial opportunities and regulatory responsibilities for the Uganda Communications Commission (UCC).

Telecommunication

Uganda's telecommunications infrastructure grew substantially in 2025, establishing a stronger physical and digital foundation for service delivery nationwide.

Towers

5,493
Towers

$40M
Investment Secured

*The national tower count rose to **5,493**, a **6% year-on-year increase** from 5,204 in 2024, and a cumulative addition of nearly 1,700 towers since 2021.*

Base Stations





*Base stations expanded from 7,879 to **8,973**, a **13.9% increase** and the strongest singleyear growth in the review period.*

Fiber



62,941 KM
Fiber in 2025

*Uganda's fiber network reached **62,941 km** in 2025, a **32% year-on-year increase** from 47,771 km in 2024 and more than triple the 19,709 km recorded in 2019.*

Satellite



Starlink formally applied to the Commission in 2025 for regulatory authorisation to provide satellite internet services in Uganda. This marks the advent of Low Earth Orbit (LEO) satellite connectivity as a potential complement to terrestrial infrastructure, particularly for geographically challenging and commercially unviable areas

Telecommunications Access

All key access indicators registered growth in 2025, confirming continued sector advancement toward the connectivity targets of Uganda's National Broadband Policy, and National Development Programme – NDP IV.

Registered Mobile Subscriptions

50.9 MILLION 2024 → 57.3M 2025

Active Mobile Subscriptions (90-day)

41.6 MILLION 2024 → 47.1M 2025

Mobile Data Subscriptions

15.7 MILLION 2024 → 18.5M 2025



Active Mobile Money (90day)

32.13 MILLION 2024 → 35.6M 2025

Active Mobile Money (30day)

24.59 MILLION 2024 → 26.53M 2025

Mobile Money Agents

0.9 MILLION 2024 → 1.1M 2025

Fixed Line Subscriptions

195,763 2024 → 296,088 2025

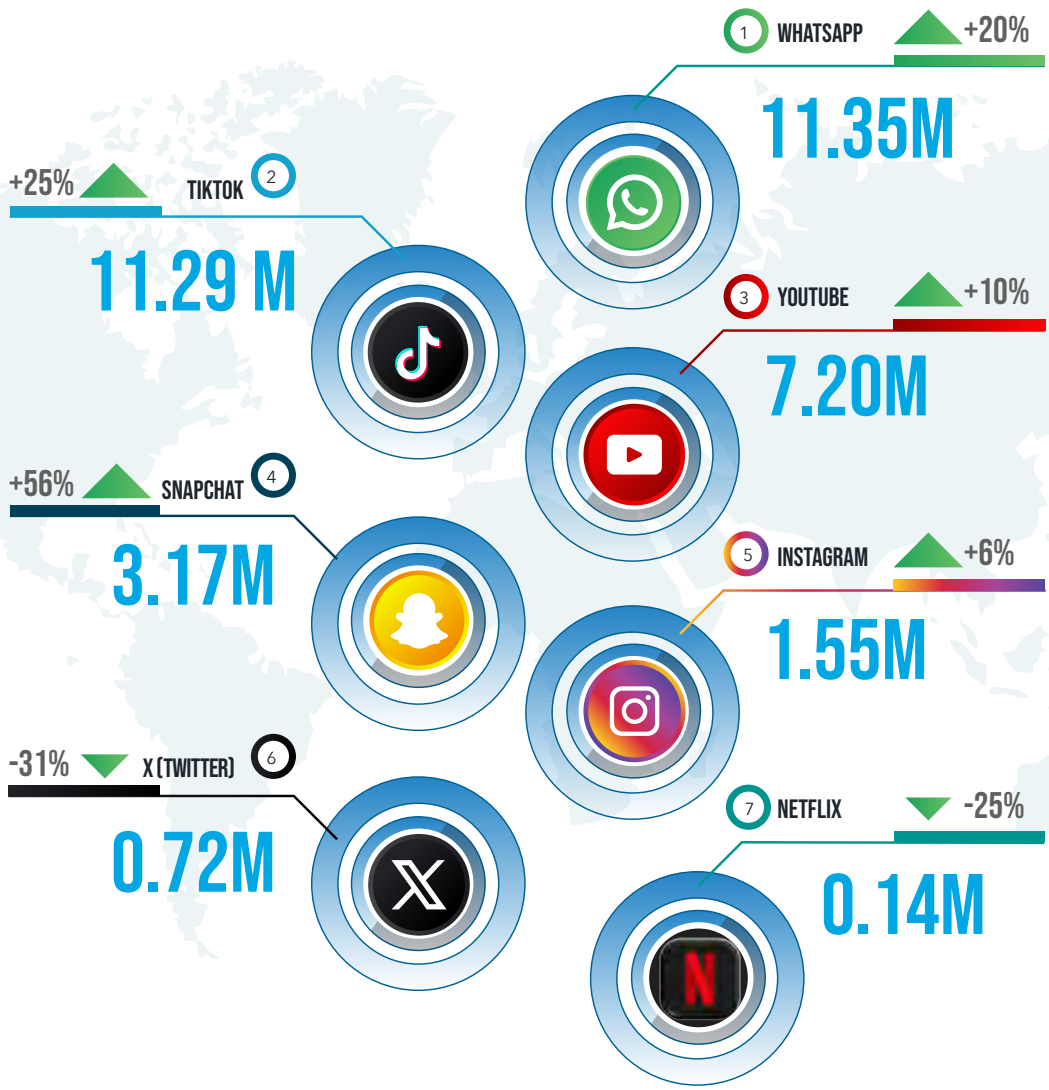
Fixed Internet Subscriptions

106,797 2024 → 228,718 2025

Internet-Capable Devices

44.93 MILLION 2024 → 52.34M 2025

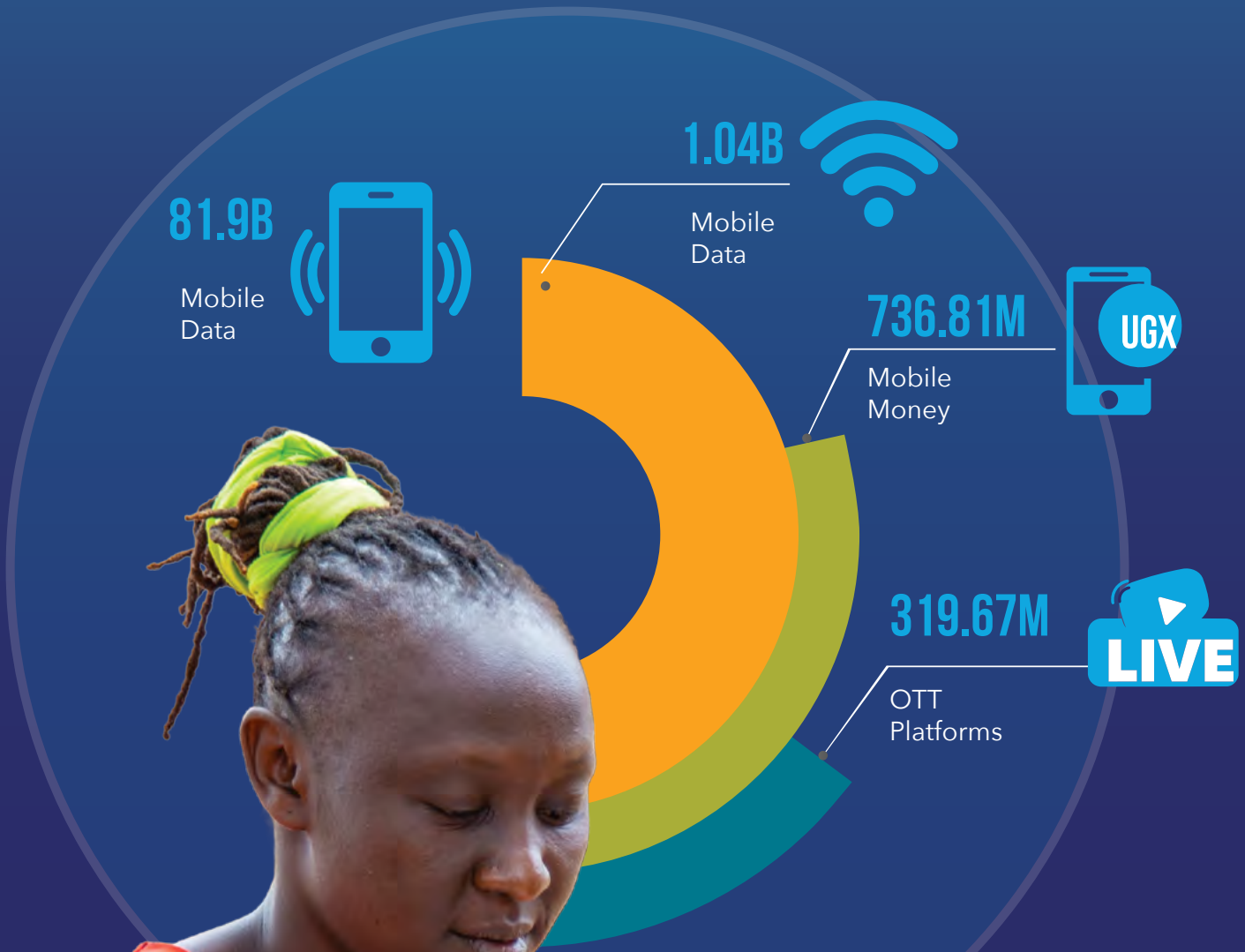
Over-The-Top (OTT) Application Adoption



M Million

Telecommunications usage in 2025 reflects a decisive transition toward data-driven consumption, with strong growth in internet traffic, OTT engagement, and mobile financial transactions.

2025 Traffic



Voice Traffic (Minutes)



Domestic on-net voice traffic grew to **81.9 billion minutes** in 2025 (up 7%), while off-net traffic surged of the 2024 revision of mobile termination rates from UGX 45 to UGX 26 per minute, which improved cross-network call affordability.

Data Traffic (GBs)



Mobile data traffic crossed the one-billion gigabyte threshold for the first time, reaching **1.04 billion GBs** in 2025 – a 28% increase from 815.9 million GBs in 2024. Per-subscriber mobile consumption stands at 63 GB per year (5.25 GB/month)

OTT Traffic (GBs)



OTT platforms account for 42% of total national internet traffic. TikTok leads with **319.67 million GBs** (85% growth) – representing 24% of total traffic – followed by WhatsApp at 135.71 million GBs (50% growth, 10% of traffic) and YouTube at 76.69 million GBs (43% growth, 6% of traffic).

Mobile Money Transactions



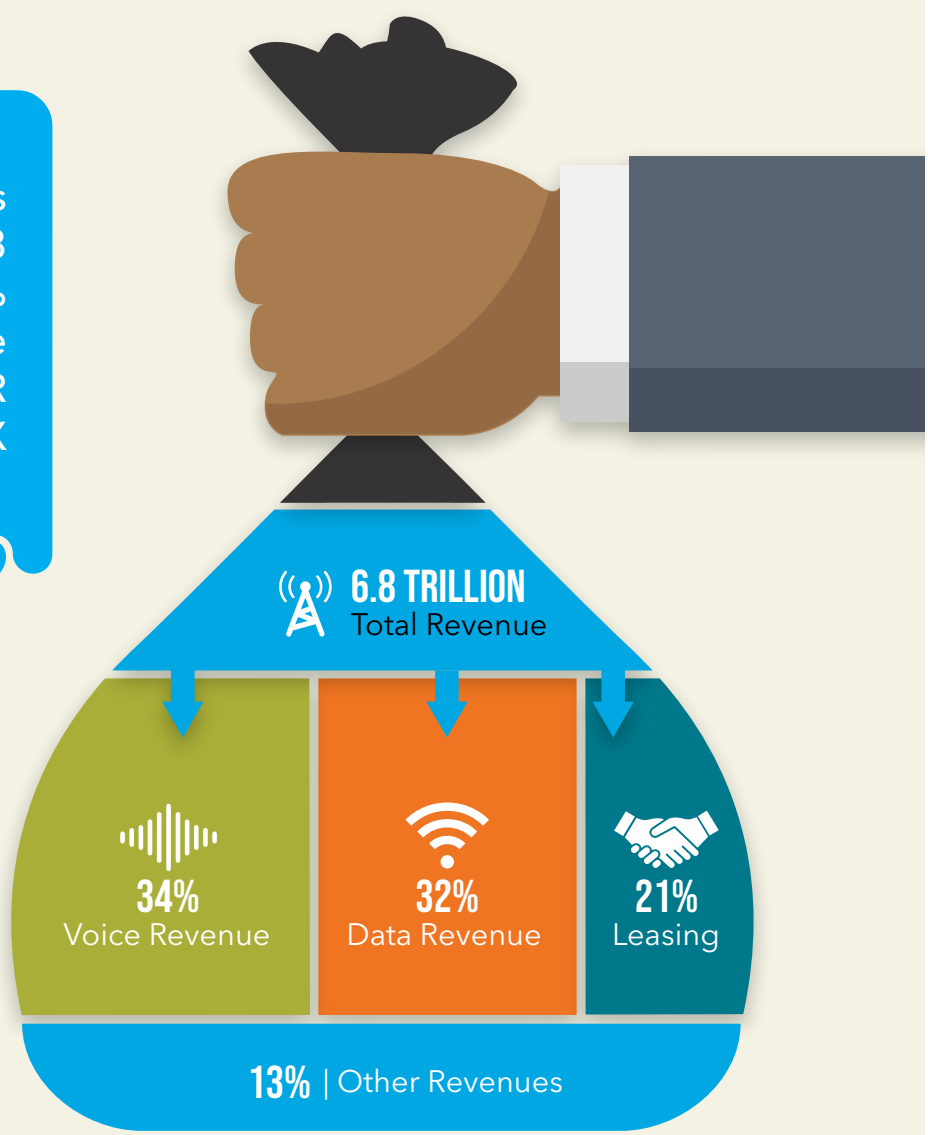
Person-to-person (P2P) mobile money transaction volumes grew 18% to **736.81 million transactions** in 2025, with total value rising 30% to UGX 69.90trillion. Cross-border inflows grew 32% (to 11.0 million transactions) and outflows 34% (to 3.52 million transactions)

Telecommunications Financial Performance

Data revenue emerged as the sector's fastest-growing and structurally most important revenue stream, expanding 27% to UGX 2.166 trillion and now constituting 32% of total revenues – up from 23.7% in 2021. Voice revenue, while still the single largest category at UGX 2.332 trillion (34% of revenues), continues to decline as a relative share. Tower lease revenue grew to UGX 1.166 trillion (five-year CAGR of 37.2%), reflecting the formalisation of passive infrastructure sharing. Data now represents 68.9% of aggregate consumer spend per subscriber, confirming the sector's data-centric transformation.

Both publicly listed MNOs recorded strong share price performance on the Uganda Securities Exchange (USE): MTN Uganda (MTNU) advanced 84.6% over the review period to UGX 470.83, cementing its position as the USE's most capitalized equity at UGX 10.5 trillion; Airtel Uganda (AIRTEL) rose 30.0% to UGX 104.

> Total sector revenues reached UGX 6.8 trillion in 2025 – a 6% year-on-year increase and a five-year CAGR of over 12% from UGX 4.22 trillion in 2021.



Universal Service Access Fund

The Universal Service Access Fund (USAF) delivered broad-based interventions in 2025 across infrastructure, devices, education, digital skilling, and inclusion:

53

Of 64 targeted subsidised tower sites commissioned under the TowerCo of Africa partnership, extending broadband to previously unserved sub-counties.

60

Public Access Centres (PACs) fully established and equipped; internet connectivity sustained across 225+ secondary schools.

4,112

Tablets distributed to PDM SACCO executives across 72 districts, with over 80% of beneficiaries actively utilising data bundles post-subsidy.

60

secondary school ICT laboratories installed; 32 primary schools completed elearning pilots under the DECEDA programme.

1,118

Boda boda riders and 1,008 youth trained in digital literacy across multiple regions; 750 teachers retooled in ICT integration.

1,010

Persons with disabilities received digital skilling and employability training across 28 districts; assistive technologies deployed in four regional centres.

6

E-Booster digital innovation solutions launched across tourism, health, mobility, and energy sectors.



Post and Courier Services

Uganda's post and courier sector demonstrated strong growth in 2025, characterised by a clear structural bifurcation: continued structural decline in traditional letter mail, offset by robust expansion in courier services, domestic last-mile delivery, and cross-border logistics.

Traffic



Total Items Delivered (2025)

~1,426,979

(vs.111,378 in 2024)

2024
2025

Domestic Ordinary Letters

+72.3%

(19,308 to **33,280**)

International Inbound Ordinary

–30%

(180,129 to **126,649**)

EMS Outbound (Exports)

+24%

(7,918 to **9,844**)

Domestic EMS

–53%

(41,723 to **19,509**)
Private courier competition

International Inbound Ordinary

–49%

(154,535 to **79,332**)

Incoming Parcels

+38%

(13,179 to **18,217**)

Outbound Courier Weight

+17.2%

(204,857 to **240,184** kg)

Total courier Weight Handled

+11.6%

(711,062 to **793,360** kg)

Revenue



*Total sector revenue grew **72.6%** from UGX 13.3 billion in 2024 to **UGX 22.9 billion** in 2025, driven by rapid growth in domestic last-mile courier services and sustained international logistics demand.*

Strategic Priorities for the Sector

Five strategic interventions are being prioritized to position Uganda's postal and courier sector competitively:

Digital Transformation

Deployment of real-time tracking, electronic data interchange (EDI), and AI-driven route optimization.

1

Green Logistics

Introduction of electric delivery bicycles in urban centers, contributing to Uganda's green jobs target.

2

Last-mile Expansion

Growth of on-demand and same-day delivery, including bodaboda-based logistics networks and pick-up/drop-off points.

3

Technology Pilots

Exploration of drone and autonomous delivery for hard-to-reach communities.

4

Regulatory Strengthening

Alignment with UPU frameworks, enhanced licensing compliance, and review of the national postal regulatory framework to reflect ecommerce and home delivery trends.

5

International Postal Governance

Uganda was elected to the Universal Postal Union (UPU) Council of Administration for the 2025-2029 cycle during the 28th UPU Congress in Dubai, securing 129 votes and ranking third among 15 African contestants for 11 available African seats. Uganda also holds the position of Assistant Secretary General at the Pan African Postal Union (PAPU). These positions afford Uganda meaningful influence over global postal policy, cross-border ecommerce frameworks, and postal digitalization standards.


















28TH UNIVERSAL POSTAL CONGRESS DUBAI 2025
28e CONGRÈS POSTAL UNIVERSEL DUBAI 2025



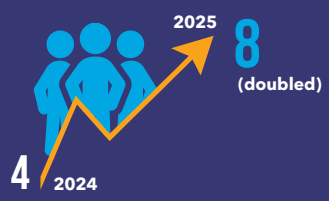

28TH UNIVERSAL POSTAL CONGRESS DUBAI 2025
28e CONGRÈS POSTAL UNIVERSEL DUBAI 2025

Film and Creative Industries

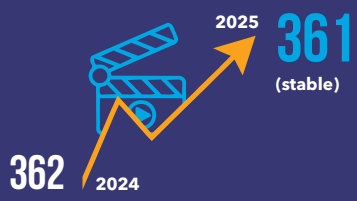
Uganda's film and audiovisual sector demonstrated strong growth in human capital development and international recognition in 2025, underpinned by sustained government investment through the Uganda Communications Commission.

Overview

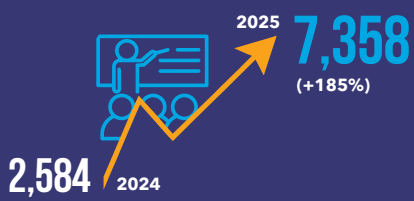
Industry Guilds



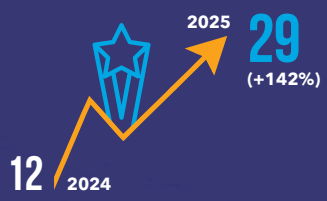
UFF Film Submissions



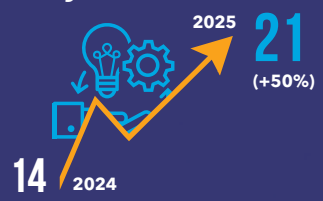
Industry Professionals Trained



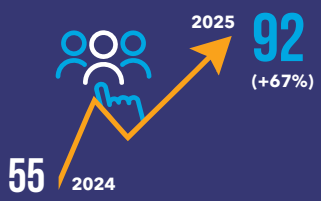
International Awards Won



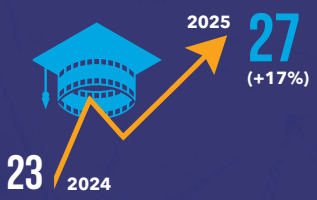
CDSP Supported Projects



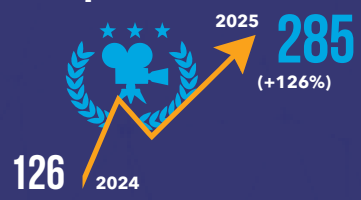
International Nominations



Licensed Film Schools



Regional Film Competition Entries



21
Projects Funded in 2025

Content Development Support Programme (CDSP)

The CDSP, now in its third cohort, supported 21 projects in 2025 — a 50% increase from the 14 supported in 2024.



361 UFF
Submissions

285 RFC
Submissions

Uganda Film Festival & Regional Film Competitions

*The Uganda Film Festival attracted **361 submissions** in 2025, maintaining the broad participation levels of prior years, with notable growth in short films (138 submissions) and documentaries (49 submissions).*

*Regional Film Competition entries **grew 126%** to **285 submissions,** with all four regions recording their highest-ever participation, confirming the RFCs' effectiveness as a decentralized talent development instrument.*

92
Ugandan Projects Nominated in 2025

International Performance

International nominations doubled over four years to 92 in 2025, while awards won rose to 29 – the highest in the four-year review period. This performance reflects cumulative improvements in production quality, storytelling, and technical standards, supported by structured national interventions.

Broadcasting and Multimedia

Uganda's broadcasting sector is navigating a period of platform transition, as traditional radio and television services coexist with, and increasingly compete against, over-the-top internet based content platforms.

Radio



*A total of **121 radio licenses** were active by December 2025 (114 FM, 7 online), compared to 290 in 2024, a reduction driven by regulatory rationalization and market consolidation. Radio remains the most pervasive medium, with 98% countrywide access.*

Television

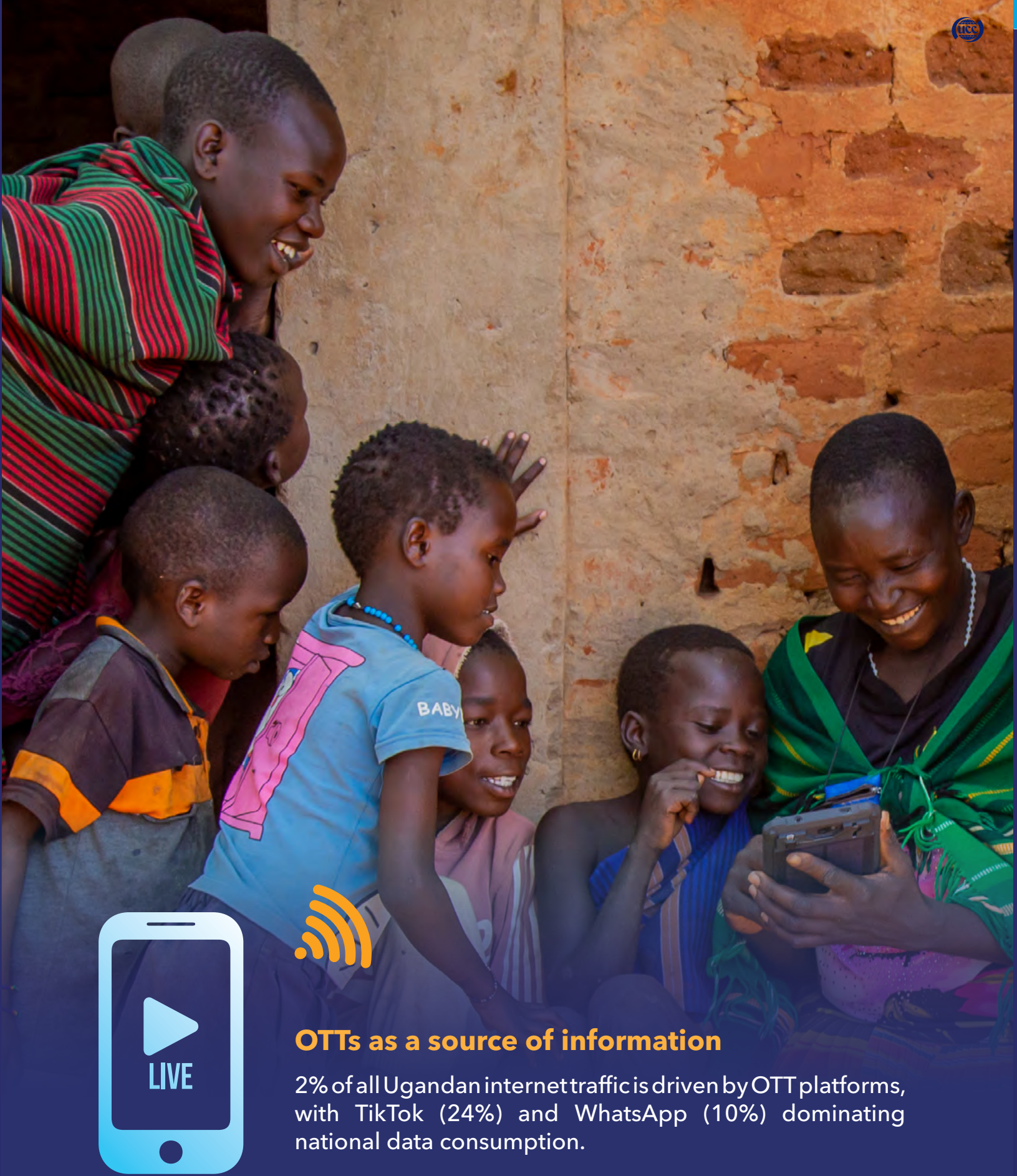


*The UCC had issued **55 television licences** across seven categories as at December 2025. Regional Free-to-Air (RFTA) licences (22 stations) remain the most prevalent, supported by UBC's SIGNET signal distribution network. A decline in total FTA licences from 30 to 22 reflects operator migration to hybrid models and the inability of some operators to sustain carriage fees. Pay TV total subscribers grew marginally by 4.4% to 2,591,846, with active subscribers rising 9.5% to approximately 1.1 million.*

OTT



*TikTok reached **11.3 million subscribers** by Q4 2025 (from 9.3 million in Q3), YouTube 7.0 million, and Snapchat 3.2 million. The convenience, affordability and personalization of OTT services, supported by rising smartphone penetration and expanding mobile data access, is progressively substituting traditional Pay TV consumption, particularly among younger and urban audiences.*



OTTs as a source of information

2% of all Ugandan internet traffic is driven by OTT platforms, with TikTok (24%) and WhatsApp (10%) dominating national data consumption.

Telecommunications

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.



Telecommunications Access Infrastructure

Telecommunications infrastructure is the backbone of mobile communication services. This includes towers, fiber optic cables, satellites, switching centers among others. Infrastructure is the supply-side: it's what operators build and maintain to deliver services. Without adequate infrastructure, telecommunications services access cannot exist.

Towers

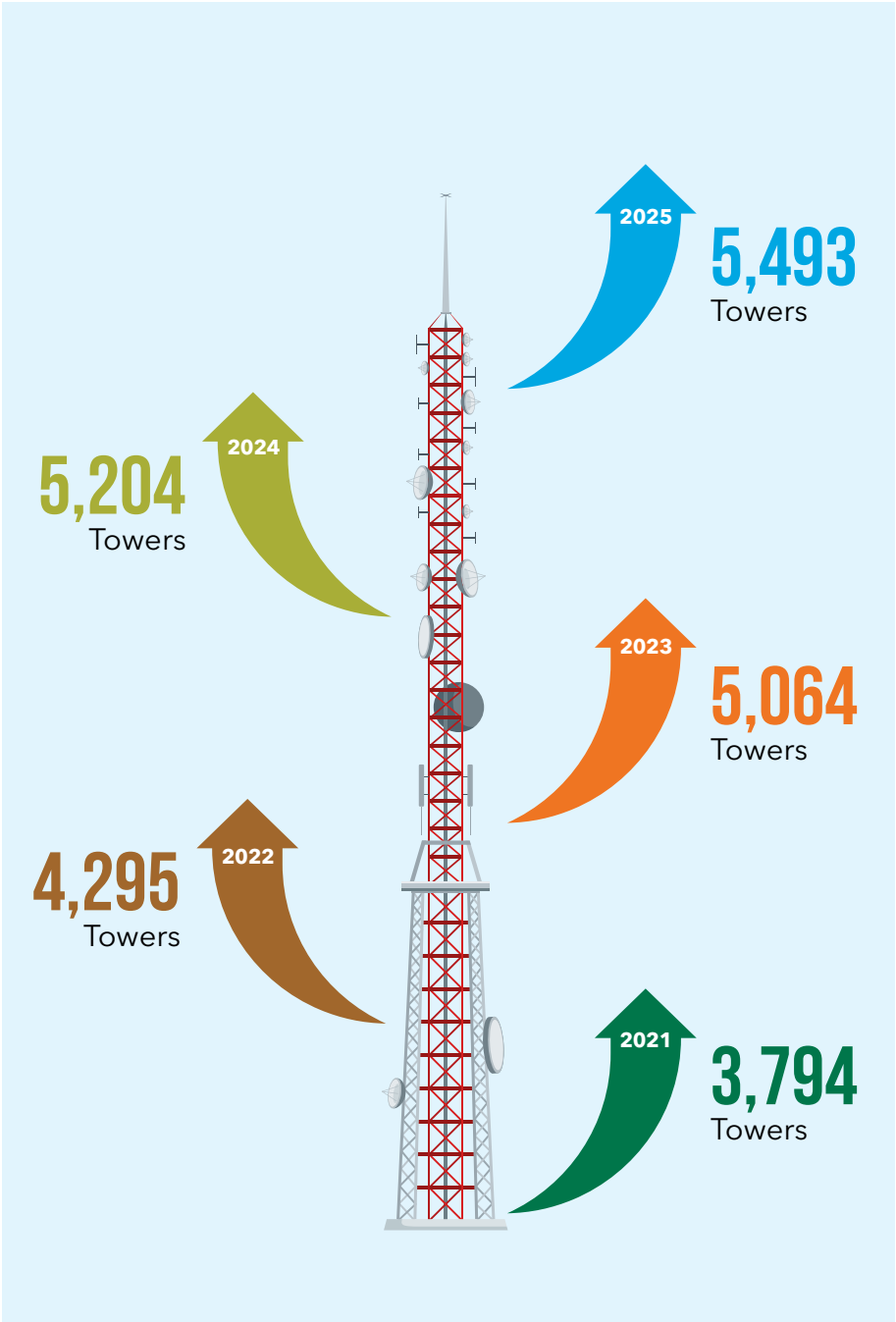
Uganda's telecommunications tower infrastructure continued a growth trajectory in 2025, with the total number of towers rising to 5,493 representing a year-on-year increase of 6% from the 5,204 towers recorded in 2024.

This sustained growth reflects the continued roll-out of mobile network coverage driven by demand for both voice and data services and emphasizes the resilience of Uganda's tower sector against broader macroeconomic trends. The overall count of 5,493 towers in 2025 represents a significant leap from the 3,794 towers recorded in 2021, reflecting a cumulative addition of nearly 1,700 towers over four years.

The period from 2021 to 2023 witnessed the sharpest pace of expansion, with tower count growing by over 1,270 in two years reflecting a period of network densification by Mobile Network Operators (MNOs).

Growth moderated in 2024, before rebounding in 2025 with an addition of 289 towers, signaling a market that is transitioning from rapid build-out to more selective and commercially targeted deployment.

Figure 1 Tower Count, 2021–2025



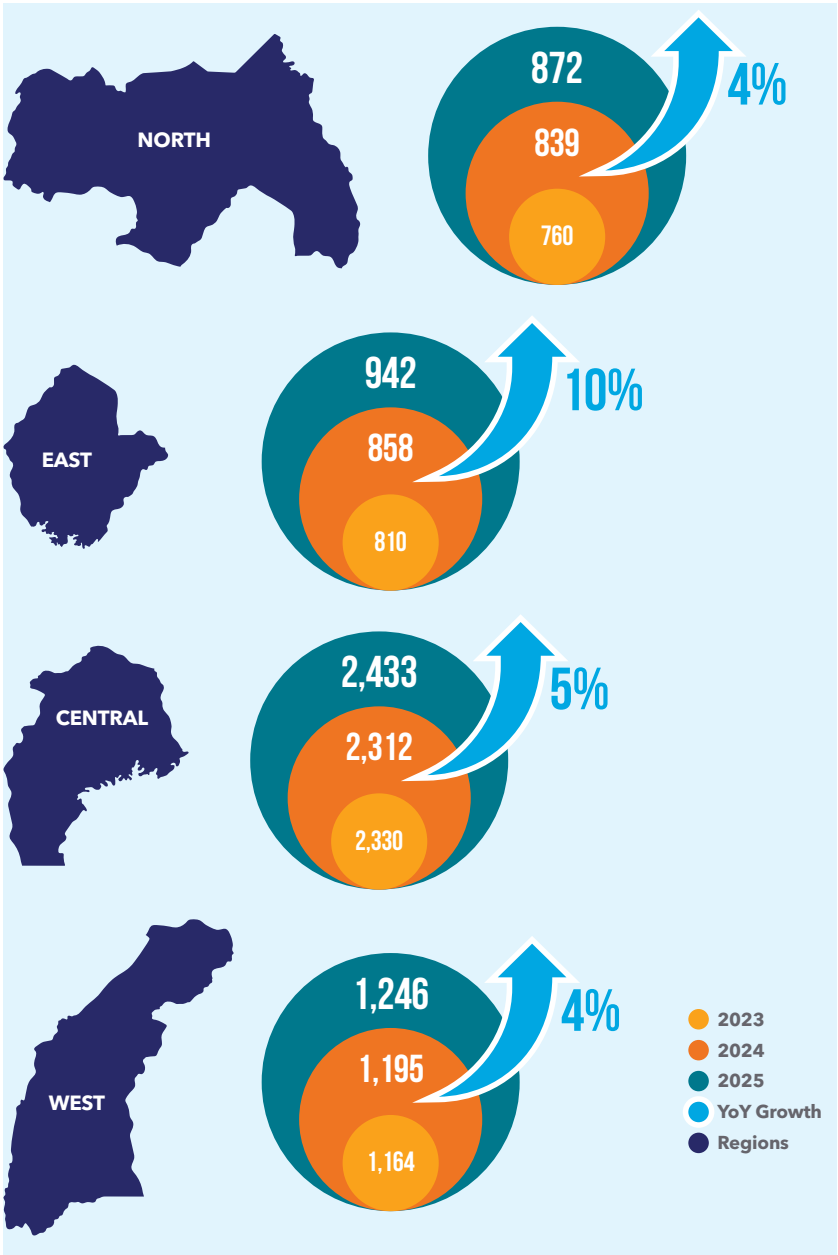
Regional Tower Distribution

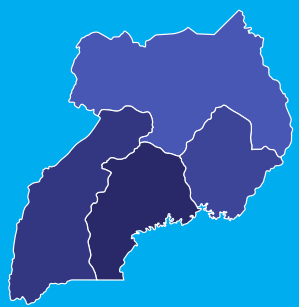
While the aggregate 6% growth figure for 2025 presents a uniform national picture, regional disaggregation reveals contrasting trends in deployment patterns that speak to both market saturation in commercially developed areas and deliberate coverage expansion in underserved regions.

The Central region retains its position as Uganda's most tower-dense zone, accounting for **2,433** of the national totals in 2025 – representing 44% of all towers in the country. This dominance is attributable to the concentration of commercial activity, population density and enterprise demand. Comparable modest growth rates of 4% were recorded in the West and North regions, where tower deployment continues to follow commercial and population corridors.

The most notable regional development in 2025 was the Eastern region, which recorded the highest growth rate at 10% – adding 84 towers to bring the regional total to **942.** This rate significantly outpaces the national aggregate and reflects a clear intent by MNOs to expand network coverage along the Eastern district corridors, including the Jinja-Tororo-Mbale axis and adjacent rural hinterlands.

Figure 2 Regional Tower Distribution, 2023–2025





The Central region retains its position as Uganda's most tower-dense zone, accounting for **2,433** of the national totals in 2025 – representing 44% of all towers in the country.

Market Structure

Uganda's tower sector is characterized by a tower co-location model, with ownership and operations dominated by two principal independent tower companies: American Tower Corporation (ATC Uganda) and TowerCo of Africa Uganda. These two entities collectively account for most of the passive infrastructure on the market, operating as neutral host providers that lease tower space to multiple MNOs on a shared-tenancy basis.

American Tower Corporation (ATC), established its footprint in Uganda through an agreement with MNOs, acquiring approximately 1,000 towers of their anchor infrastructure. ATC has since expanded its Ugandan portfolio significantly, operating under a multi-tenant commercial model that serves MTN, Airtel, and other network operators.

TowerCo of Africa (ToA) Uganda, the second major player, has demonstrated a particularly proactive approach to rural expansion. Since securing USD 40 million in funding in 2024 from European Investment Bank, the TOA has since commenced implementation of its tower build programme particularly in unserved and underserved areas. This investment, to be deployed over two years, is expected to contribute meaningfully to Uganda's national goal of achieving over 90% mobile network coverage.

> Since securing USD 40 million in funding in 2024 from European Investment Bank, the TOA has since commenced implementation of its tower build programme particularly in unserved and underserved areas.



13.9%
Base stations increase
(7,879 - **8,973**)

Base stations

Base stations are the active Radio Access Network (RAN) equipment that transmit and receive wireless signals between mobile devices and the broader telecommunications network. Unlike passive tower infrastructure which provides the physical structures upon which equipment is mounted, base stations represent the active technology layer that determines the quality, capacity and generation of mobile service delivered to end users.

Uganda's base station network registered its strongest year of growth in the review period, expanding from 7,879 base stations in 2024 to **8,973** base stations in 2025, a year-on-year increase of 13.9%.

This growth rate outpaces the 6.0% recorded between 2023 and 2024, when the total grew from 7,432 to 7,879 stations, and signals a decisive step-change in the pace of active network infrastructure deployment across the country.

The 2025 addition of 1,094 base stations represents the largest single-year increment in last three years and reflects the compounding effect of MNO capital investment, the ongoing buildout of 4G coverage in under-connected areas, and the accelerating roll-out of 5G technology in urban and peri-urban centers. For users, this translates into more stable connections, reduced network congestion, improved call quality, and more consistent data speeds particularly in urban and high-demand environments where network performance is critical

Industry Developments

One of the most significant developments within Uganda's base station and active telecommunications network infrastructure landscape in 2025 was the execution of the network-sharing agreement between MTN Group and Airtel Africa in March 2025.

This agreement, covering both Uganda and Nigeria, authorizes the two operators to share network infrastructure including towers, base stations and fiber-optic networks, with the dual objectives of improving cost efficiency and accelerating coverage expansion, particularly in underserved rural areas.

The agreement represents a notable departure from the traditionally adversarial competitive posture of Uganda's two major MNOs and reflects a broader strategic pragmatism emerging across the African telecommunications industry as operators navigate the dual pressures of rising infrastructure costs and the imperative to extend connectivity to low-revenue rural markets.

Among the specific modalities considered under the agreement are Radio Access Network (RAN) sharing, which involves the pooling of active network equipment at individual sites as well as commercial and technical agreements for fiber infrastructure sharing, and the coconstruction of fiber networks where required.



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Backhaul

Fiber Networks

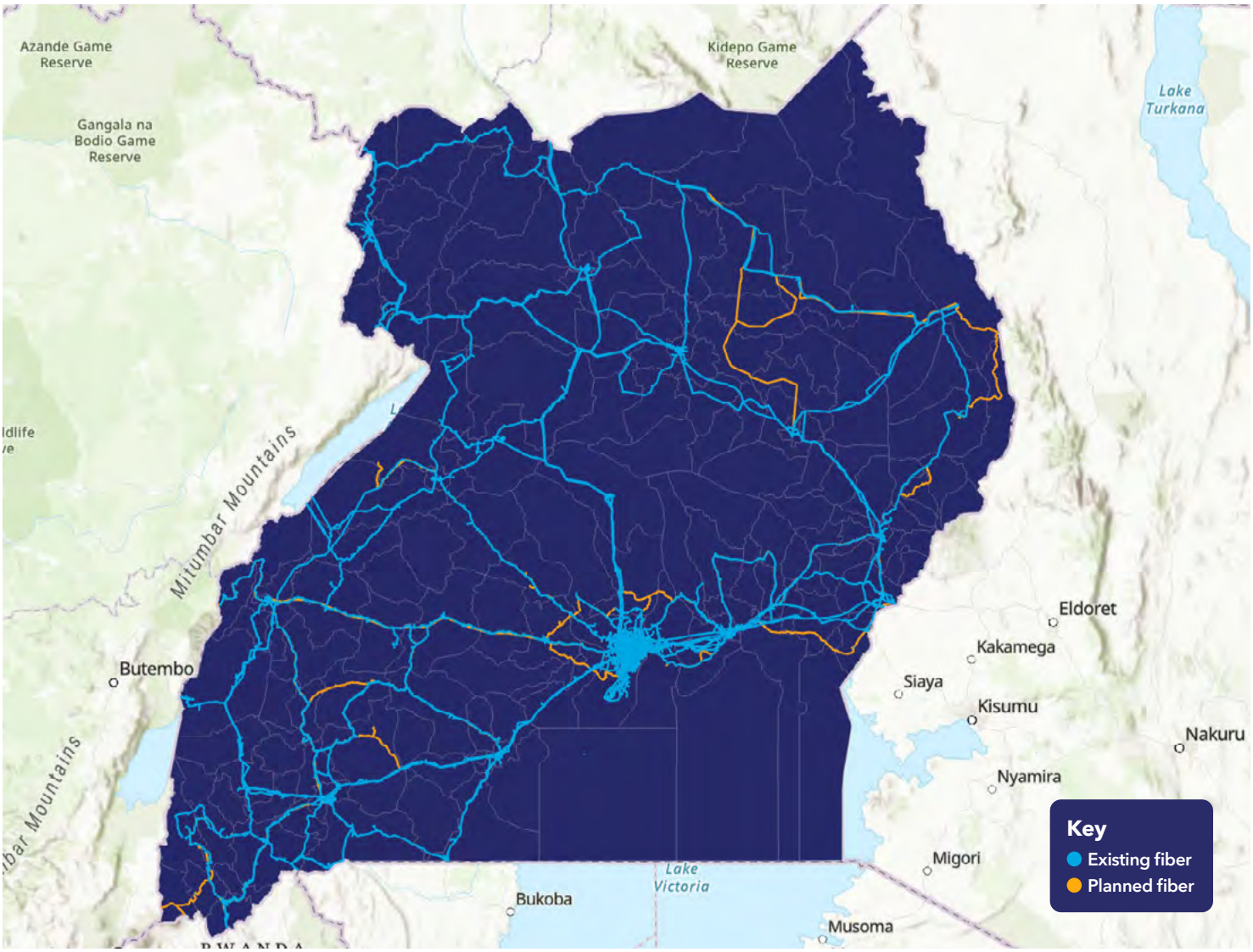
Uganda's fiber optic network recorded its most significant expansion on record in 2025, with total fiber infrastructure reaching 62,941 kilometers, a year-on-year increase of 32% from the 47,771 kilometers recorded in 2024. This performance marks a decisive acceleration in Uganda's transition toward fixed broadband infrastructure and represents the largest single year absolute addition in the sector's history, adding over 15,000 kilometers in twelve months.

62,941 KM

Fiber in 2025

A 32% year-on-year increase from 47,771 km in 2024 and more than triple the 19,709 km recorded in 2019. The Central Region accounts for 63% of deployed fiber (39,716 km).

Figure 3 **Fiber Infrastructure Footprint 2025**



From 19,709 kilometers in 2019, the network has more than tripled in six years, growing by over 43,000 kilometers cumulatively. Whilst growth between 2021 and 2023 was comparatively measured with the network expanding from 28,353 to 33,653 kilometers, the period from 2023 to 2025 saw a major acceleration, adding nearly 30,000 kilometers in two years.

This inflection point reflects the convergence of multiple demand and supply-side drivers, including government backbone infrastructure investments, growing commercial fiber deployment by licensed operators, and a decisive consumer shift from mobile-centric connectivity toward fixed broadband solutions.

Uganda's fiber market in 2025 observed significant business investment, with majority of the Internet Service Providers and Mobile Network Operators repositioning their businesses;

*MTN Uganda, secured a **UGX 370 billion** loan from local financial institutions for network expansion.*

*Group Vivendi Africa (GVA), the African digital infrastructure arm of the French media conglomerate Vivendi, invested **UGX 50 billion** (approximately USD 13.5 million) in laying fiber across Kampala in its initial phase.*

Wananchi Group, the East African fixed broadband provider operating the Zuku consumer brand and Simbanet enterprise brand in Uganda, underwent a transformative ownership change in late 2025.

Kampala Siti Cable, Savannah fiber, Zuku Fiber, Simba Fiber also remain active players in the Kampala metropolitan fiber market, contributing to the densification of the fixed broadband network in urban residential and commercial corridors.

Regional Fiber Distribution

The Central region dominates Uganda's fiber geography, accounting for 39,716 of the national total **62,941 kilometers** in 2025, representing approximately 63% of all deployed fiber. This concentration is a function of both demand-side and supply-side factors. From a demand perspective, the Central region, anchored by Kampala and its growing urban periphery, concentrates the highest density of businesses, public institutions, educational establishments and middle-to-upper income residential households, the primary consumers of fixed broadband services.

Critically, the Central region's fiber network has expanded well beyond the traditional commercially viable core of Kampala's central business district. Fiber deployment is now extending actively into districts such as Wakiso which borders Kampala and hosts a rapidly expanding population of urban workers and emerging enterprises as well as Masaka district to the south-west.

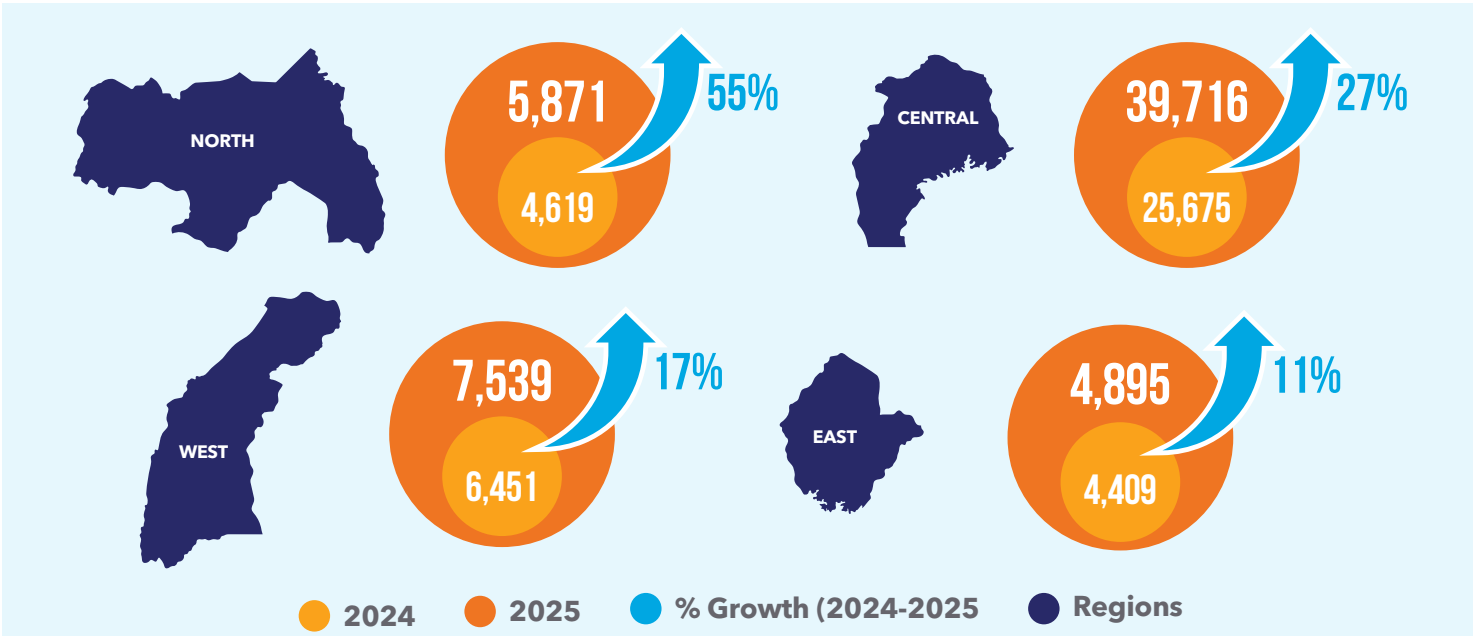
Deployment has been particularly pronounced in town centers along key highway corridors, where population density and commercial activity create sufficiently attractive subscriber acquisition economics.

The Northern region emerged as the second fastest-growing fiber market in 2025, recording a 27% year-on-year increase, growing from 4,619 kilometers in 2024 to 5,871 kilometers in 2025. This trajectory reflects deliberate government intent to extend fiber connectivity to historically underserved areas of northern Uganda.

Of particular significance is the planned extension of the national fiber network to the Kotido district in the Karamoja sub-region, an arid and sparsely populated area that has long lacked reliable telecommunications infrastructure.

The Eastern and Western regions recorded more modest growth at 11% and 17% respectively, reflecting a combination of existing infrastructure constraints and lower population density in rural areas.

Figure 4 Regional Fiber Distribution (km) 2024 - 2025



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Satellite

Uganda stands at the threshold of a significant new phase in its connectivity landscape with the advent of Low Earth Orbit (LEO) satellite internet services. The most prominent and globally recognized of the emerging satellite providers seeking entry into the Ugandan market is Starlink, the satellite internet service developed and operated by Starlink Services LLC, a subsidiary of SpaceX.

Starlink's primary business interest in the Ugandan market centers on the provision of highspeed internet access to underserved and geographically challenging areas where the economics of deploying fiber or mobile tower infrastructure are unattractive to commercial operators.



In 2025, Starlink formally applied to the Commission for the regulatory authorization required for the lawful provision of telecommunications infrastructure services in Uganda.

The UCC's licensing and approval process for satellite operators such as Starlink involves a comprehensive review of the applicant's technical specifications, spectrum allocation requirements, compliance with national security frameworks, and adherence to the provisions of the Uganda Communications Act and related subsidiary legislation.

Telecommunications Access

Telecommunications access refers to the ability of individuals, households, or businesses to obtain and use communication services. It is about whether people are within reach of services and can realistically connect. This includes factors like service subscriptions through Subscriber Identity Modules (SIM) cards, mobile devices, and mobile money subscriptions among others.

Telecommunications access in Uganda continued to grow in 2025, reflecting the cumulative impact of regulatory interventions, infrastructure investments by operators and growing consumer adoption of digital communication services.

All the key access indicators registered growth, affirming the sector's continued advancement towards the connectivity targets in the National Broadband Policy. This performance is indicative of increasing market penetration in both urban and peri-urban areas.

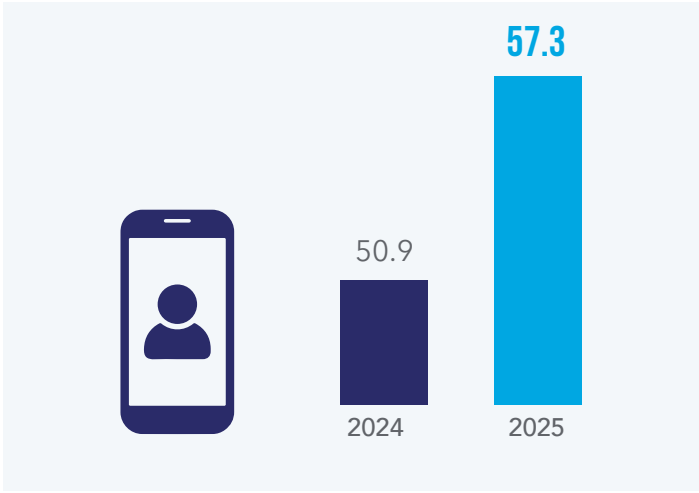
It is worth noting that the growth was recorded, not only in legacy mobile voice and fixed line services, but also in data, digital financial services and emerging digital application layers. This pattern is consistent with a maturing yet still-expanding communications ecosystem.

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Mobile Subscriptions

Registered mobile subscriptions increased from 50.9 million in 2024 to 57.3 million in 2025, representing a year-on-year growth of 12%. This growth reflects both organic subscriber deepening and new subscriber acquisition, supported by expanded network coverage, and intensified operator service distribution across the country.

Figure 5 **Registered Mobile Subscriptions (Millions)**



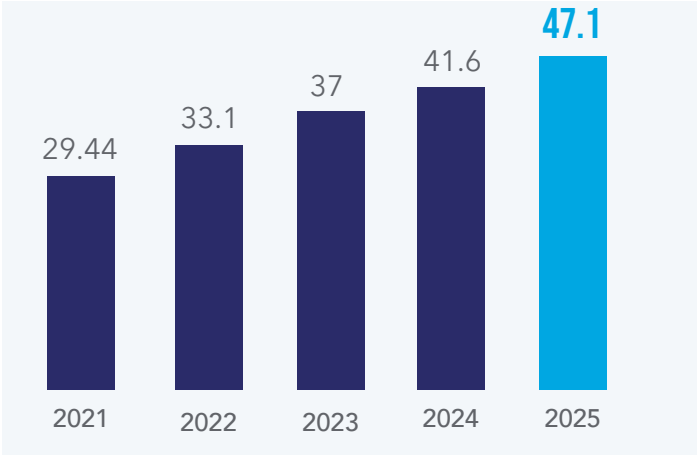
Mobile active subscriptions defined as registered SIM cards that recorded at least one revenue-generating event within a 90-day period, stood at 47.1 million at end-2025, up from 41.6 million in 2024, representing a 13% increase and indicating strengthened productive subscriber engagement.

This growth is attributable, in part, to tariff adjustments particularly in traditional voice and mobile data services, promotional offers by operators, and the expanding ecosystem of services accessible via mobile networks.

Further, Uganda's 13% single-year active subscription growth points to both catch-up demand from previously underserved segments and deepening usage among existing subscribers. Placed in regional context, Uganda's active subscription base translates to approximately 100 subscriptions per 100 inhabitants in 2025, reflecting the prevalence of multi-SIM behavior among Ugandan mobile users.

Further, this is broadly consistent with the African regional average of 92 mobile cellular subscriptions per 100 inhabitants reported by the ITU in 2025, though it is above the African average due to multiple SIM ownership, and still materially below the global average of 112 subscriptions per 100 inhabitants (ITU 2025).

Figure 6 Active Mobile Subscriptions (Millions)



Unique Mobile Subscriptions

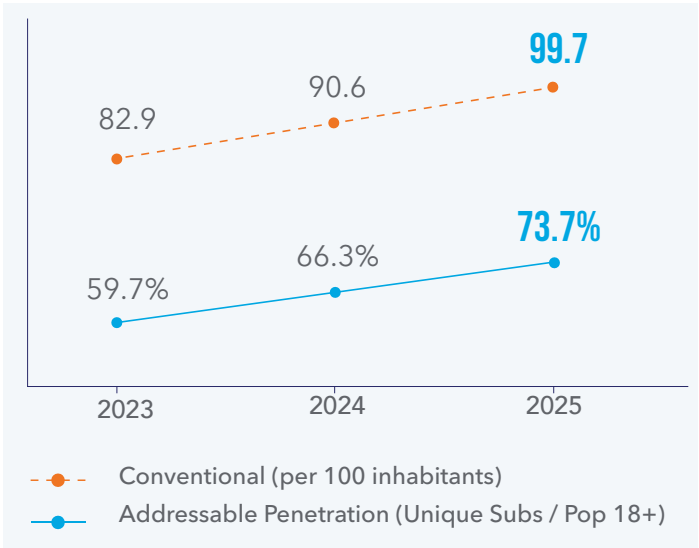
Uganda's headline mobile penetration figure for 2025, 99.7 subscriptions per 100 inhabitants appears, at first reading, to place Uganda's mobile market at near-universal saturation.

By conventional ITU methodology, where total active subscriptions are divided by the full national population and expressed per 100 inhabitants, Uganda's 99.7 implies that virtually every Ugandan already has a mobile connection.

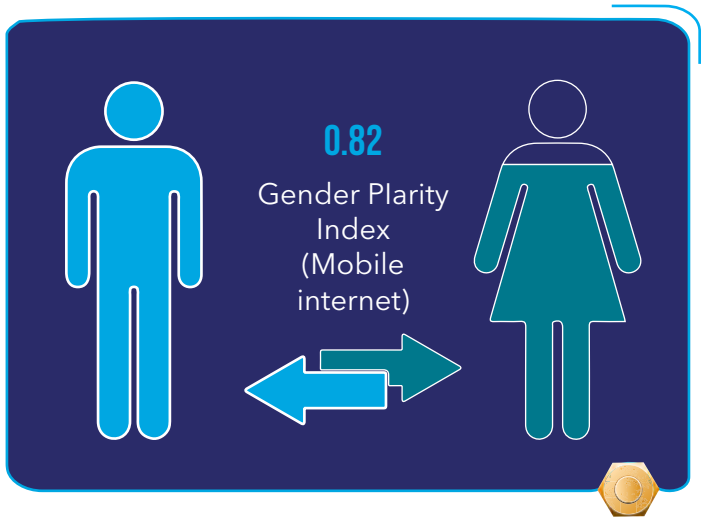
The Commission's preferred framework for assessing the true state of mobile market access is what this report terms 'addressable penetration': the ratio of unique mobile subscribers to the population aged 18 and above, the economically active, legally capable adult population that constitutes the realistic demand base for mobile services.

Since 2023, Uganda's unique mobile access has evolved. In 2023, Uganda's addressable penetration stood at 59.7%. By 2024 it had risen to 66.3%, and by 2025 it reached 73.7%, a 14.0 percentage-point improvement over three years, driven by unique subscriber growth of 14.5% between 2024 and 2025 alone, when 2.14 million new unique subscribers joined Uganda's mobile networks.

Figure 7 Conventional vs Addressable Penetration



Uganda's ITU Gender Plarity Index (GPI) score stood at **0.82** in 2025, up from 0.79 in 2023, meaning that for every ten men using mobile internet, approximately eight women do. A score of 1.0 represents full gender parity. Uganda's improvement to 0.82 is measurable progress, and it places Uganda ahead of the African continental average GPI of 0.79 – a meaningful regional distinction.



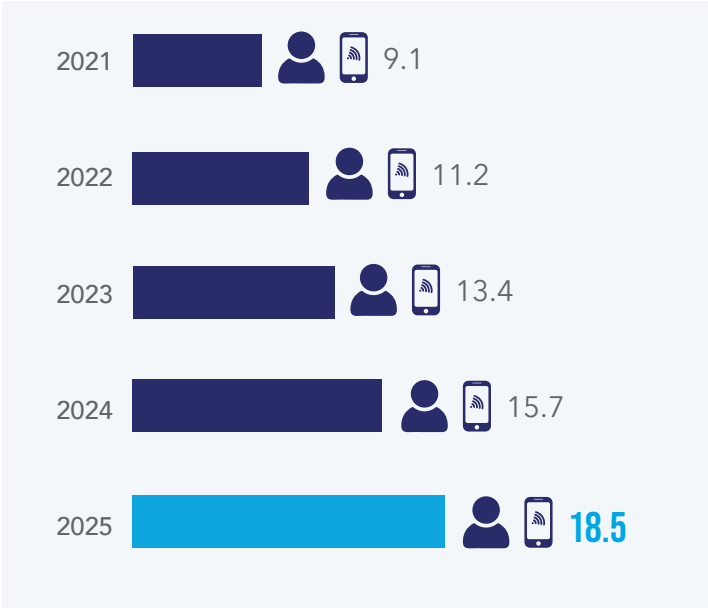
Mobile Data Subscriptions

Mobile data subscriptions grew by 19%, rising from 15.7 million in 2024 to **18.5 million** in 2025. This increase is consistent with growing consumer demand for internet-based services, including social media, e-commerce, and audio-visual streaming services, and reflects an expansion in the proportion of mobile subscribers accessing data services.

In Uganda, the ratio of mobile data subscriptions to total active subscriptions, approximately 39%, indicates that a large portion of active mobile subscribers remain on voice-only or basic data services, reinforcing the need for further mobile data penetration growth, conditioned on improvements in device affordability, data pricing and network quality.

In Uganda, the criterion for classifying an active mobile internet is one who uses atleast 30MB to better reflect meaningful internet usage patterns in today's digital environment.

Figure 8 **Active Mobile Data Subscriptions (Millions)**

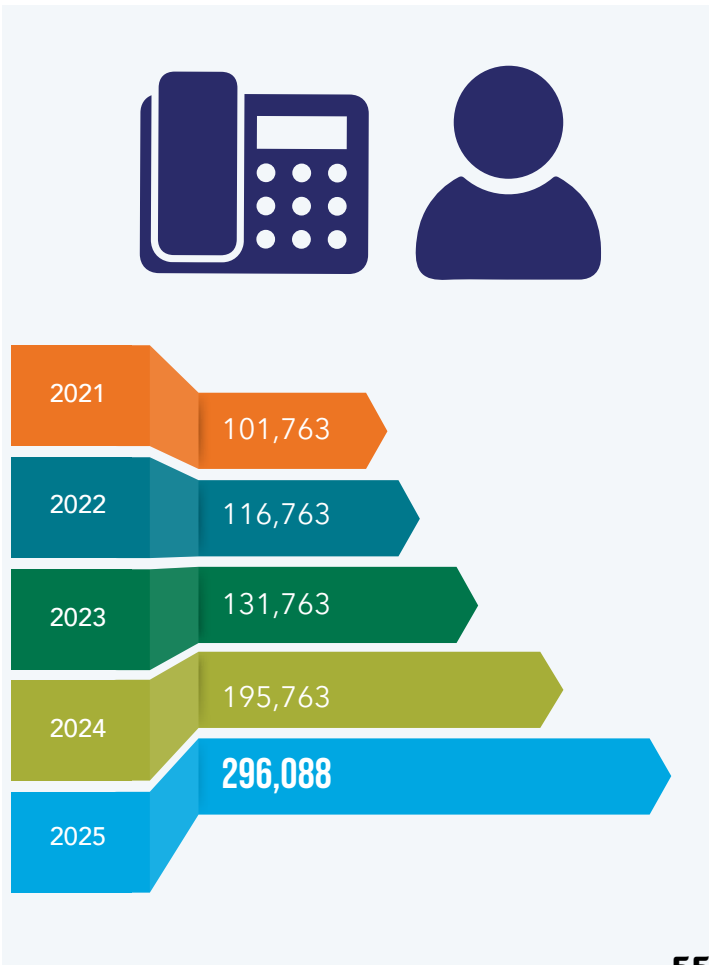


Fixed Line Subscriptions

Fixed line subscriptions recorded an increase from 195,763 subscriptions in 2024 to 296,088 subscriptions in 2025, a year-on-year growth of 51%. This growth is primarily driven by enterprise and institutional demand, where dedicated fixed connectivity is a key business requirement. The stabilization and incremental growth of fixed line subscriptions is an indicator of business connectivity.

Uganda's fixed line density approximately 0.6 per 100 inhabitants is consistent with the lowfixed-connectivity tier observed across comparator countries in the region, highlighting the continued primacy of mobile networks as the dominant access modality.

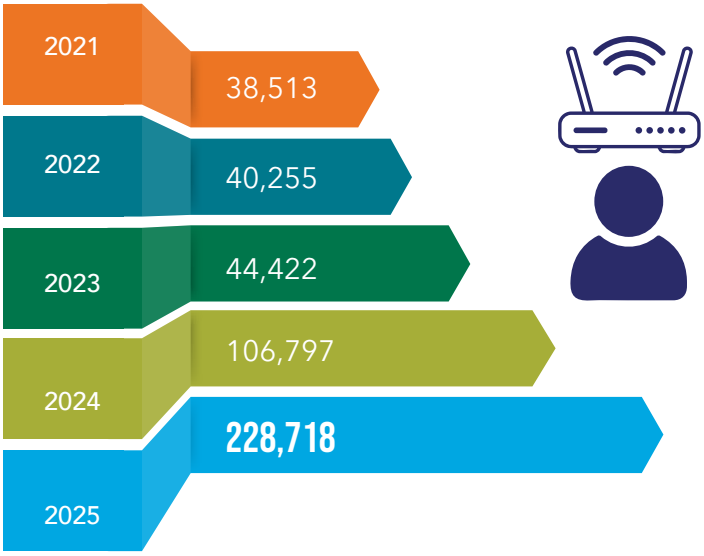
Figure 9 **Fixed Line Subscriptions, 2021-2025**



Fixed Internet Subscriptions

Fixed internet subscriptions including fiber-to-the-home and fiber-to-the-business grew from 106,797 to **228,718 subscriptions**, a year-on-year increase of 114%. This growth is driven by rapid expansion of fiber infrastructure by both established operators and new entrants, with most deployments concentrated in the Central Region and major urban centers.

Figure 10 **Fixed Internet Subscriptions (Thousands)**



> Fixed internet subscriptions' growth is driven by rapid expansion of fiber infrastructure by both established operators and new entrants, with most deployments concentrated in the Central Region and major urban centers.

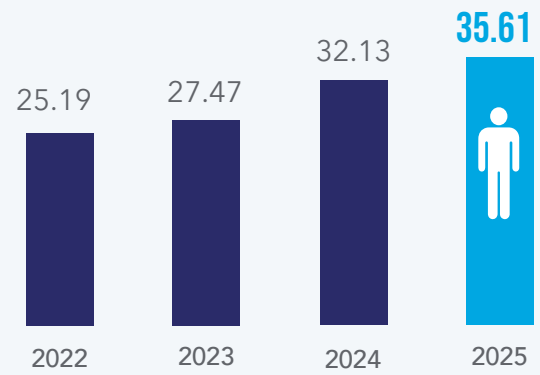


Active Mobile Money Subscriptions

Active Mobile Money Subscriptions (90 Day)

Active mobile money subscriptions–measured over a 90-day activity period–reached 35.6 million in 2025, up from 32.13 million in 2024, representing an 11% increase. This 90-day metric captures users who transact less frequently but on a recurring basis, indicating that mobile money is increasingly embedded in household and informal-sector financial activity.

Figure 11 Active Mobile Money Subscriptions – 90 Day (Millions) 2022-2025

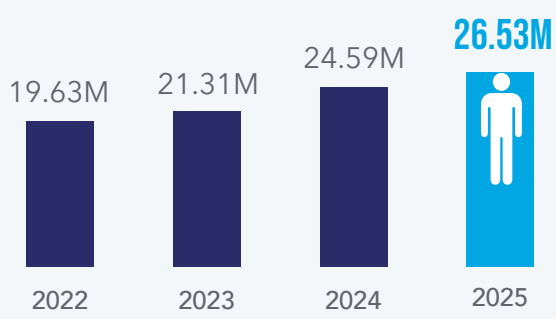


Active Mobile Money Subscriptions (30 Day)

On the 30-day activity measure, mobile money subscriptions increased to 26.53 million in 2025 from 24.59 million in 2024, representing 8% growth, capturing users who transact monthly.

The convergence ratio comparing 30-day to 90-day active users declined slightly to 74.5% in 2025 from 76.5% in 2024, indicating that incremental growth is increasingly driven by lower intensity users.

Figure 12 Active Mobile Money Subscriptions – 30 Day (Millions) – 2022-2025

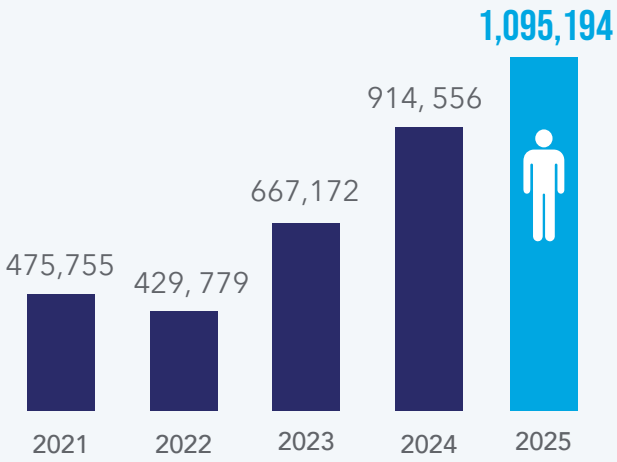


Mobile Money Agents

The mobile money agent network expanded to 1.1 million registered agents in 2025, up from 0.9 million in 2024, representing a 20% increase. Agent density is a determinant of mobile money accessibility, particularly for cash-in and cash-out transactions in areas with limited bank branch presence.

Through partnerships between mobile operators and banks, many agents now offer both mobile money and basic banking services, reducing transaction costs for users. The agentto-subscriber ratio therefore stands at 32 subscriptions per agent.

Figure 13 Count of Mobile Money Agents 2021-2025

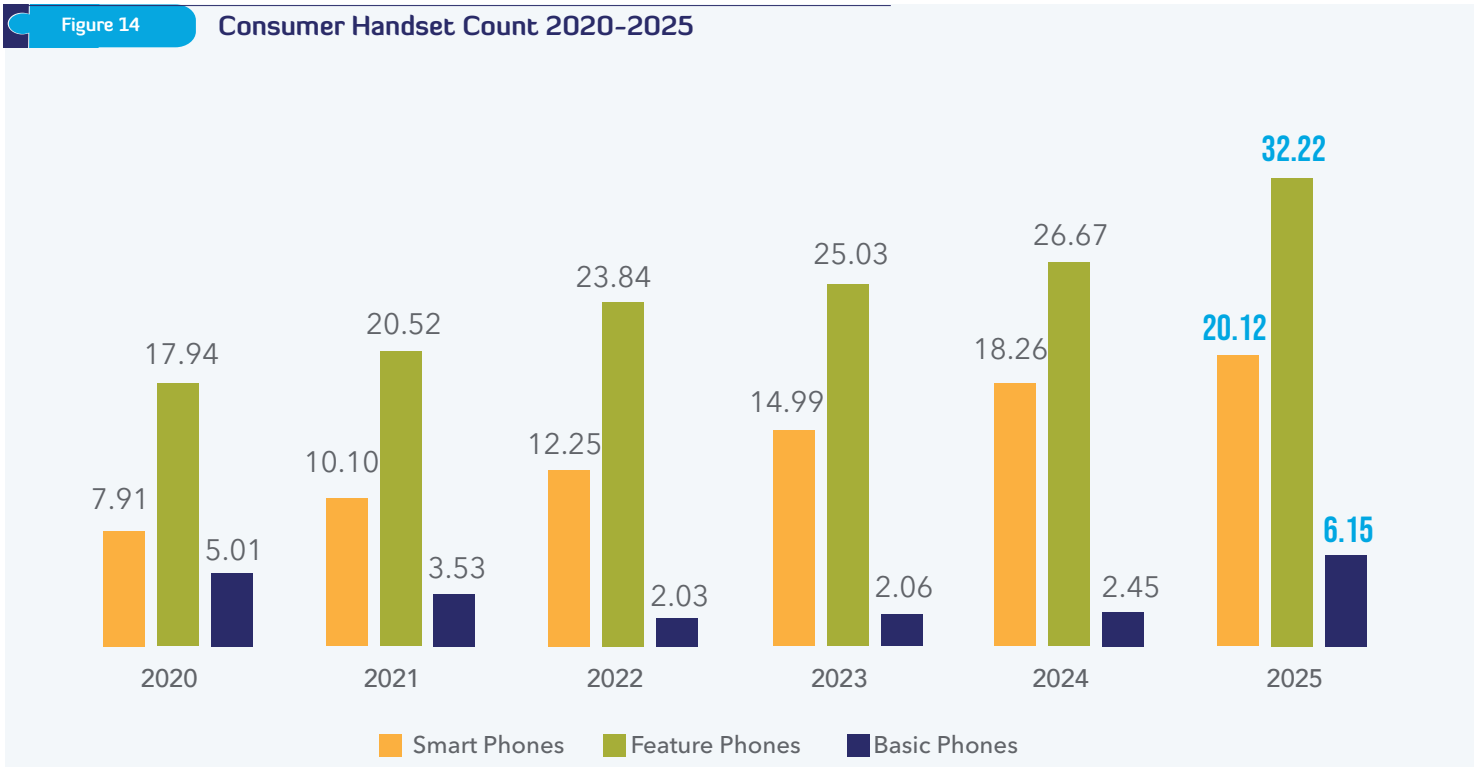


Consumer Devices

The number of internet-capable consumer devices increased to an estimated 52.34 million devices in 2025 from 44.93 million in 2024, approximately 16.5% growth. Smartphones accounted for 38% of the internet-capable devices, with feature phones comprising the remaining 62%.

Uganda's 38% slightly falls short below the 52% average smartphone penetration at continental level and the 75% globally.

Figure 14 **Consumer Handset Count 2020-2025**



Industry Snapshot of Consumer Devices - Dec 2025

20.12M
Smart Phones
Mobile computing platform with an advanced operating system, touchscreen, more sophisticated applications, and full internet connectivity



32.22M
Feature Phones
An improved version of a basic phone with additional features such as: a camera, internet access, storage, and limited applications, but still uses a physical keypad

6.15M
Basic Phones
Makes calls, sends SMS, uses USSD with no internet or apps

M: Millions

Last Mile Over The Top (OTT) Applications

Over-The-Top (OTT) applications are software-based services delivered over Telecommunicationss operator-managed broadband infrastructure without direct operator involvement in service provisioning. Last-mile OTT applications are consumer-facing and include

- Short messaging platforms such as Whatsapp.
- Voice and Video calling applications such as Zoom, and Teams.
- Audio-Visual media platforms including TikTok, SnapChat, Instagram.
- Video Streaming platforms such as Netflix, Hulu among others.

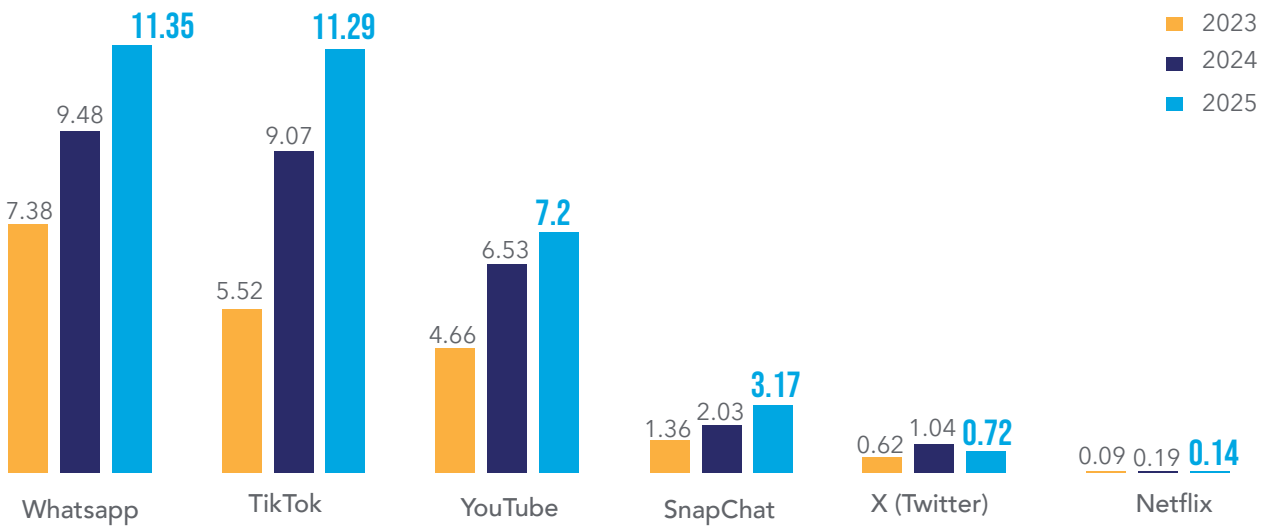
The deployment and active use of last-mile OTT applications in Uganda continued to grow steadily in 2025, driven by increasing mobile and fixed data access, the availability of lowcost social media bundles and the growing popularity of youth-focused audio-visual content streaming platforms.

WhatsApp remained the most widely used OTT platform with 11.35 million users in 2025 (up 20%), driven by its low data consumption, broad utility and integration into everyday communication.

TikTok followed closely at 11.29 million users (up 25%), with its content-recommendation algorithm prioritizing local music, comedy and news content. Snapchat recorded the highest percentage growth at 56%, reaching 3.17 million users.

X (formerly Twitter) and Netflix both declined by 31% and 25% respectively, with X's drop driven by the introduction of monitoring systems that detect and remove fake accounts, and Netflix's decline reflecting fewer viewers per profile as account-sharing tightened and overall access patterns shifted in early 2025.

Figure 15 **Last Mile OTT Application User Count 2023-2025**



Telecommunications Usage

Telecommunications usage in 2025 reflects a continued transition toward data-driven consumption, with strong growth in internet traffic, OTT engagement, and mobile financial transactions, alongside evolving dynamics in traditional voice services.

While voice services remain relevant, particularly within domestic on-net networks, their growth in cross-border voice traffic is increasingly moderated by substitution from internetbased communication platforms. In contrast, data usage continues to accelerate, driven by video streaming, social media engagement, and the expansion of digital services across multiple sectors.

Domestic Voice Service Consumption Patterns

Domestic voice traffic continued to grow, supported by sustained demand for basic communication services, particularly within on-net networks.
Consumption patterns are gradually evolving, with increased cross-network calling influencing traditional voice usage.

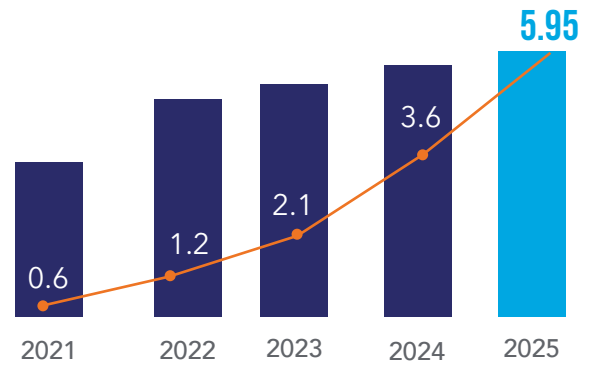
This trend indicates a transition toward a hybrid communication ecosystem, where voice remains essential but is increasingly complemented by internet-based alternatives. For users, this translates into more diverse communication options, with growing flexibility in how they connect across networks and platforms

On-net Voice Traffic

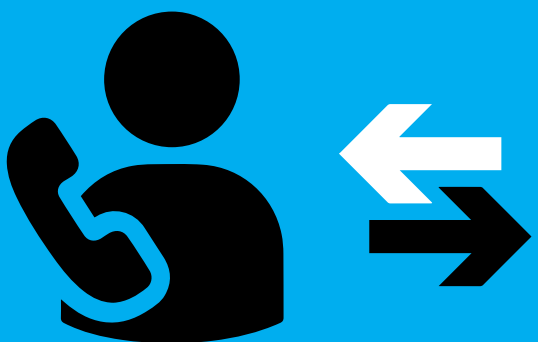
Over the last 5 years, voice traffic continued to grow, with on-net traffic increasing from 64.4 billion minutes in 2021 to 81.9 billion minutes in 2025 (27% growth). Off-net traffic expanded significantly from 0.60 billion minutes to 5.95 billion minutes over the same 5-year period.

The 2025 period observed significant growths particularly for offnet traffic. Offnet traffic grew from 3.9 billion minutes to 6 billion minutes, which is a growth of 52%, compared to the 7% growth observed in the on-net traffic segment that ended 2025 with 81.9 billion minutes.

Figure 16 **Domestic Voice Traffic Trends (Billion Minutes) 2021-2025**



> The sharp rise in off-net traffic reflects improving pricing competitiveness. The revision of mobile termination rates, in 2024 from UGX 45 to UGX 26 per minute, has accelerated crossnetwork calling further.



Data Traffic

Data traffic recorded strong growth across both mobile and fixed networks, driven by increased consumption of video content, social media, and digital services.

The expansion reflects a fundamental shift toward data-intensive usage patterns, supported by rising smartphone penetration and improved network capacity. This trend reflects a fundamental role of data as the primary driver of telecommunications usage.

Mobile Internet Traffic

In 2025, mobile traffic crossed the billion mark with mobile data traffic growing from 815.9 million GBs to **1.04 billion GBs (28% growth).**

Uganda's estimated per-subscription mobile traffic intensity of approximately 5.2 GB per month matches the African average, indicating significant growth in mobile broadband adoption over the last few years. This trend indicates increasing pressure on network infrastructure, particularly in supporting video-heavy and real-time applications, reinforcing the need for continued investment in fiber and high-speed access networks.

Uganda's 63 GB/year (5.25 GB/month) data consumption per subscriber in 2025 positions the country notably above the ITU-reported African average of 3 GB/month (2024).

Figure 17 Mobile Data Traffic Trends (Billion GBs) 2021-2025



In 2025, mobile traffic crossed the billion mark with mobile data traffic growing from 815.9 Million GBs to **1.04 Billion** TBs (28% growth).

Fixed Internet Traffic

Between 2024 and 2025, fixed internet traffic rose from 102.29 million GBs to 314.06 Million GBs, a 207% year-on-year increase, driven by fiber-connected enterprises, institutions and high-consumption households.

By nature, fixed broadband networks carry approximately five times more end-user internet traffic than mobile broadband networks, reflecting the strategic importance of fiber infrastructure for supporting the most data-intensive digital use cases. Uganda's 207% fixed traffic growth signals an emerging structural shift as the fiber subscriber base passes a critical mass threshold. Broadband adoption is slowly shifting from the mobile to premises of residence.

Figure 18 Fixed Data Traffic Trends (Million GBs) 2021-2025



One Network Area (ONA) Voice Traffic)

The One Network Area (ONA) is a regulatory initiative established by the East African Community (EAC). Its core purpose is to eliminate international mobile roaming surcharges and harmonize communication tariffs across member states. Under the ONA framework, cross-border communication (voice calls, SMS, and increasingly data) is treated similarly to domestic traffic, enabling users to "Roam Like at Home." Member states in this framework include Uganda, Kenya, Rwanda, Tanzania, Burundi and South Sudan.

Uganda received 794.4 million ONA incoming minutes and sent 163.6 million ONA outgoing minutes across the four EAC partner states in 2025. The year opened strongly with quarter one volumes peaking in January (75.3M ONA incoming) and February (76.7M), before experiencing a sharp mid-year dip to around 61M minutes per month in May–June. Partial stabilization followed through the second half of the year, with December closing at 67.1M minutes incoming.

The net traffic position shows Uganda as a strong receiver of ONA traffic – incoming volumes are approximately 4.9 times outgoing volumes, driven largely by Kenya's enormous subscriber base sending calls into Uganda.

Incoming and Outgoing ONA Traffic

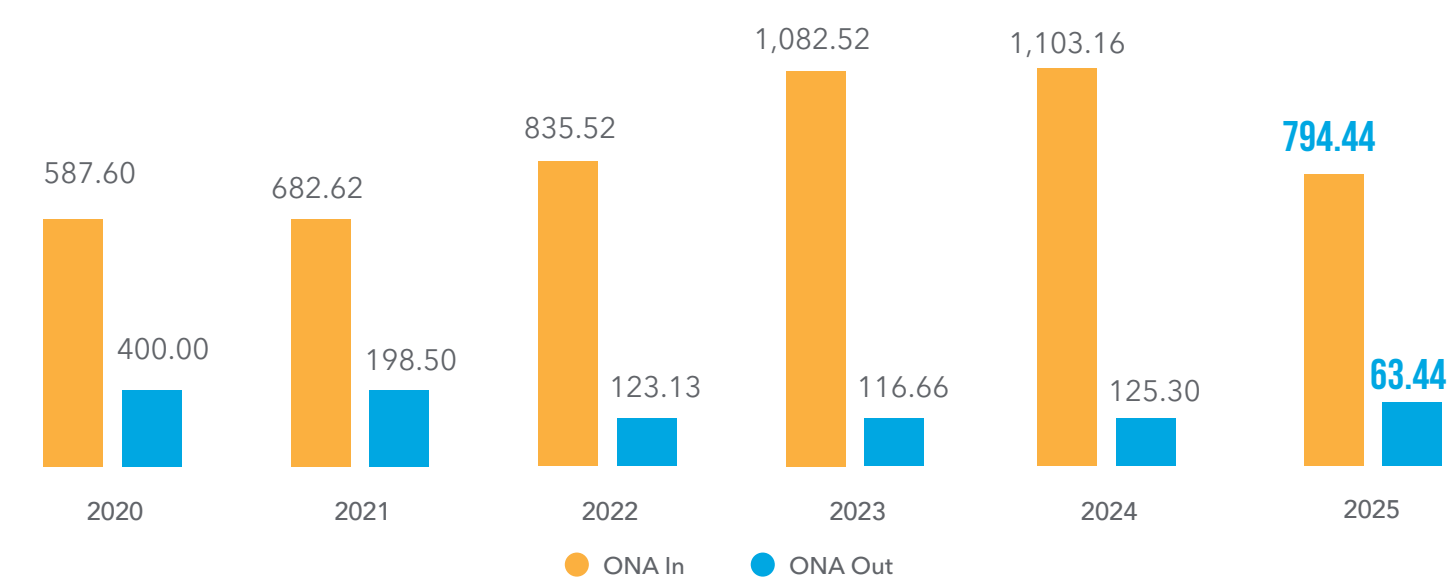
Incoming One Network Area (ONA) traffic increased from 682.62 million minutes in 2021 to a peak of 1,103.16 million minutes in 2024 (62% growth), before moderating to 794.44 million minutes in 2025 (28% decline from peak).

Outgoing ONA traffic, while lower in volume, recovered to 163.44 million minutes in 2025, up from 125.3 million minutes in 2024 (30% growth).

Kenya accounts for 66.3% of all incoming ONA traffic to Uganda – 530.4 million minutes over the full year, averaging 44.2 million minutes per month. This dominance reflects a deep cross-border economic, family, and diaspora ties between Kenya and Uganda, particularly along the Kampala–Nairobi corridor.

Incoming traffic from Tanzania grew consistently across all twelve months rising from 3.64 million in January 2025 to 5.43 million minutes in December 2025, representing a 49% growth.

Figure 19 ONA Voice Traffic (Million Minutes) 2020-2025



International Voice Traffic

Incoming International Voice Traffic

Figure 20 International Incoming Voice Traffic (Million Minutes) 2021-2025

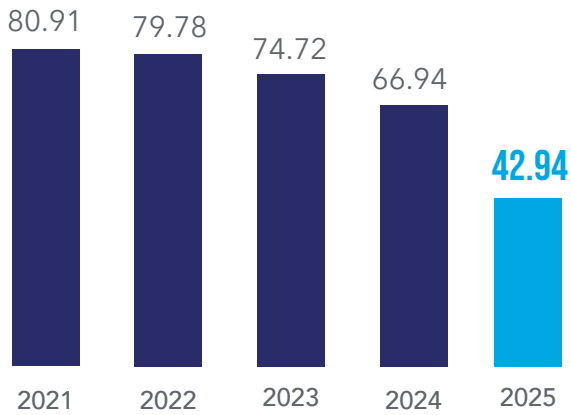
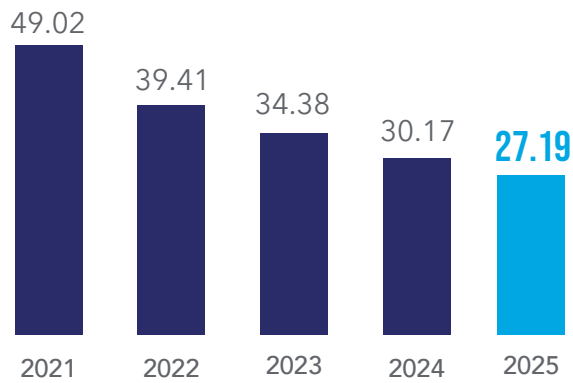


Figure 21 International Outgoing Voice Traffic (Million Minutes) 2021-2025





International voice traffic declined steadily, with incoming traffic falling from 66.9 million minutes in 2024 to **42.94 million** minutes in 2025 (36% decline).

On the other hand, Outgoing international voice traffic fell from 30.17 million minutes in 2024 to **27.19 million minutes** in 2025, a 10% decline, closely mirroring incoming traffic, confirming that OTT substitution is symmetric and broad-based across both call directions.

Worth noting is that conventional international voice traffic has been among the segments most severely affected by OTT substitution, as internet-based calling platforms offer comparable or superior quality at a fraction of the cost. The decline is a global structural feature of market evolution rather than reduced cross-border connectivity.

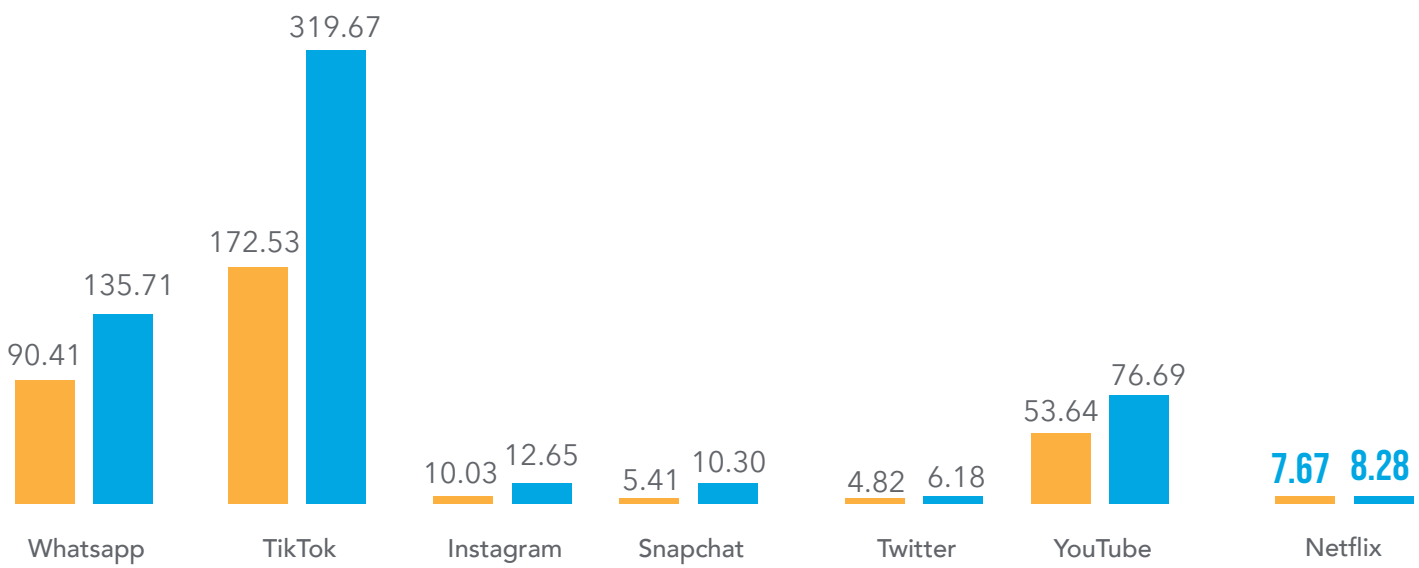
Over-The-Top (OTT) Services

OTT-driven data consumption increased significantly in 2025, with TikTok leading at 319.67 million GBs , nearly doubling from 172.53 million GBs in 2024 (85% growth), followed by WhatsApp at 135.71million GBs (50% growth) and YouTube at 76.69 million GBs (43% growth).

TikTok's outsized traffic footprint relative to its subscriber count nearly matching WhatsApp despite slightly fewer subscribers reflects the inherently data-intensive nature of short-form video content.

On average, 42% of Ugandan internet traffic is driven by OTT platforms, with Whatsapp (10%) and TikTok (24%) dominating the Ugandan internet use. For Uganda's network operators, the concentration of traffic in a small number of video and messaging platforms creates both network management challenges and commercial ortunities through social-mediaspecific data bundle offerings.

Figure 22 Social Media OTT Traffic (Million GBs) 2024-2025





OTT-driven data consumption increased significantly in 2025, with TikTok leading at **319.67 million GBs** , nearly doubling from 172.53 million GBs in 2024 (85% growth), followed by WhatsApp at 135.71million GBs (50% growth) and YouTube at 76.69 million GBs (43% growth).

Unstructured Supplementary Service Delivery - USSD Traffic

Figure 23 USSD Traffic (Billion Sessions) 2021-2025



USSD services remain a critical channel within the telecommunications ecosystem, providing widely accessible, real-time access to essential digital services particularly among users without smartphones or reliable internet connectivity.

In 2025, USSD sessions grew to a tune of 66.6 billion up from 61.5 billion sessions in 2024, reflecting an 8% growth. Their continued usage highlights the enduring importance of lowbandwidth, device-agnostic platforms in supporting inclusive access to mobile-enabled services such as financial transactions, account management and service enquiries.

A significant portion of Uganda's population remains in the basic connectivity tier, where USSD provides a reliable access point bridging the gap between basic mobile connectivity and full digital participation.

Mobile Money Transactions

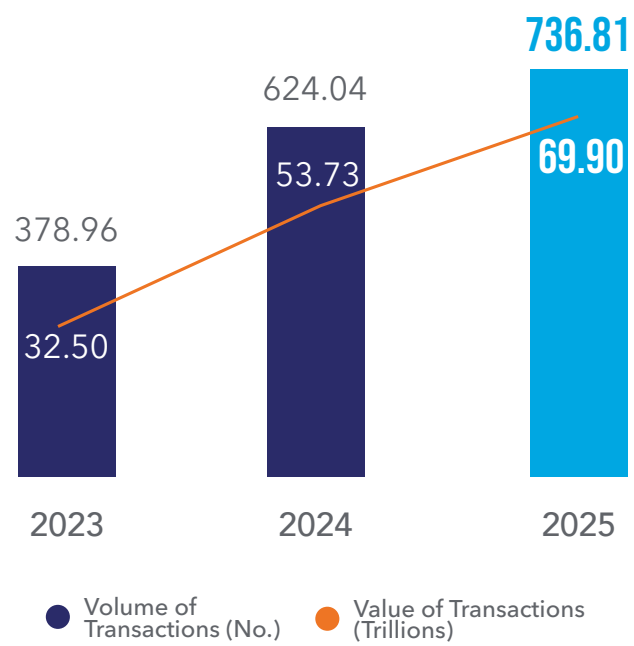
P2P transactions and Values

Peer-to-peer (P2P) transactions remain a core component of mobile money usage, underpinning a significant share of domestic financial flows and everyday monetary exchanges.

Uganda's mobile money sector witnessed a growth in person-to-person (P2P) performance. Within this single year, transaction volumes grew by 18%, rising from 624.04 million in 2024 to 736.81 million in 2025. This growth in usage was accompanied by an even sharper increase in transaction value, which jumped by 30% from Shs 53.73 trillion to Shs 69.90 trillion.

Notably, the average value per transaction rose from Shs 86,094 to Shs 94,863, signaling that users are not only transacting more frequently but are also moving larger sums of money across the digital ecosystem.

Figure 24 P2P Transaction Volumes and Values 2023-2025



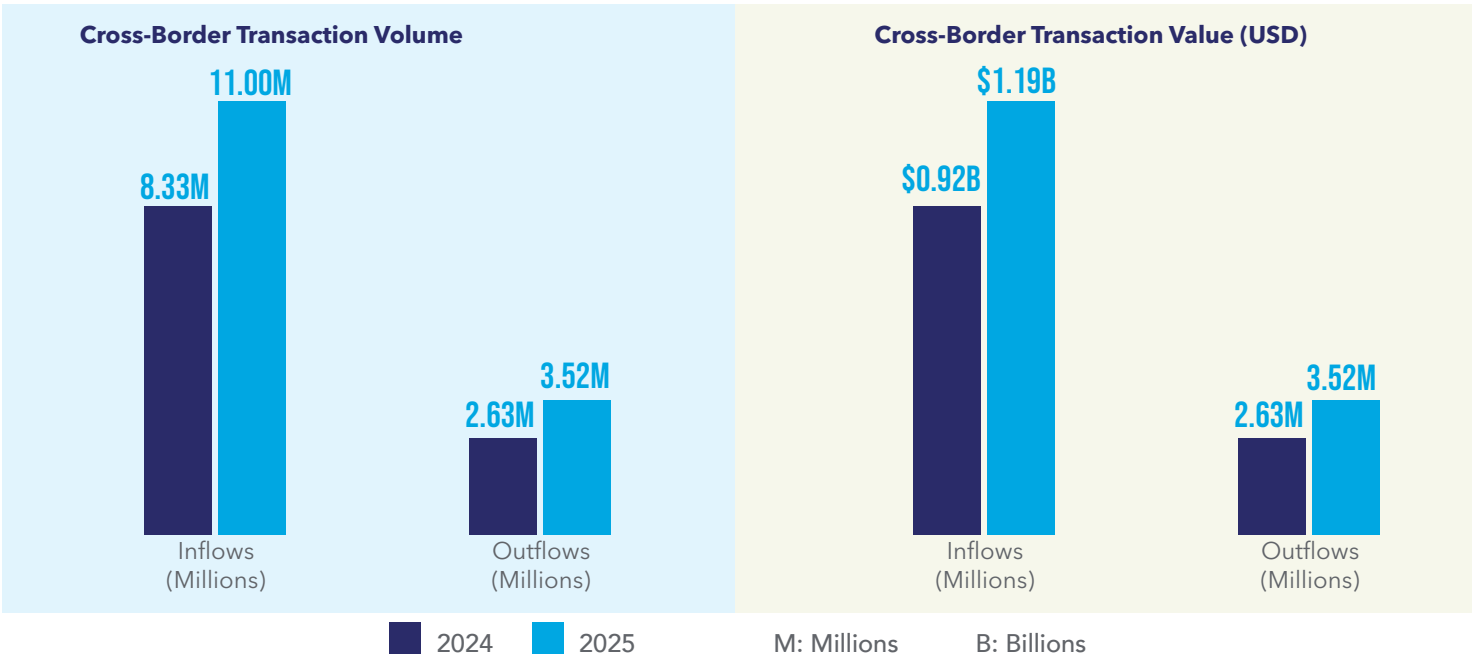
Cross Border Transactions

Average Cross-Border Transaction Value

Cross-border mobile money transactions recorded strong growth in 2025. Inflow volumes increased by 32% (8.33 million to 11.0 million transactions) and outflow volumes rose by 34% (2.63 million to 3.52 million transactions). Transaction values expanded in parallel, with inflows growing by 28% and outflows by 33% respectively.

Despite the strong volumetric and value growth, the average value per transaction declined marginally by 3% for inflows (from USD 111 to USD 108) and by 1% for outflows. This dip is largely attributed to the foreign exchange fluctuations between the dollar and the Uganda shilling in 2025.

Figure 25 Cross Border Transaction Volumes and Values 2024–2025





Cross-border mobile money transactions recorded strong growth in 2025. Inflow volumes increased by 32% (8.33 million to **11.0 million transactions**) and outflow volumes rose by 34% (2.63 million to **3.52 million transactions**). Transaction values expanded in parallel, with inflows growing by 28% and outflows by 33% respectively.

Telecommunications Finance

Uganda's telecommunications sector closed the 2025 calendar year with total operatordeclared revenue of UGX 6.8 trillion, representing a 6% year-on-year growth from UGX 6.5 trillion in 2024. While this growth rate moderated from the double-digit performances of prior years, 15.3% in 2024 and 16.3% in 2022, it reflects structural consolidation in a maturing market where data monetization, infrastructure leasing, and mobile financial services are redefining the sector's financial architecture.

The sector's two publicly listed mobile operators, MTN Uganda (MTNU) and Airtel Uganda (AIRTEL) both recorded significant share price appreciation on the Uganda Securities Exchange (USE) from July 2025 to early 2026. MTN Uganda's share price climbed 84.6% from UGX 255 to UGX 470.83, cementing its status as the USE's most capitalized stock at UGX 10.5 trillion. Airtel Uganda rose 30.0% from UGX 80 to UGX 104 over the same period.

Data revenue emerged as the fastest-growing revenue stream, growing 27% year-on-year to UGX 2.166 trillion and now representing 32% of total sector revenues. Per-subscriber data consumption reached 63 GB per year (5.25 GB/month).



Disabled persons of Soroti sharing the knowledge they learnt from UCC's Annual trainings on ICT for Persons with Disabilities.

Share Price Performance

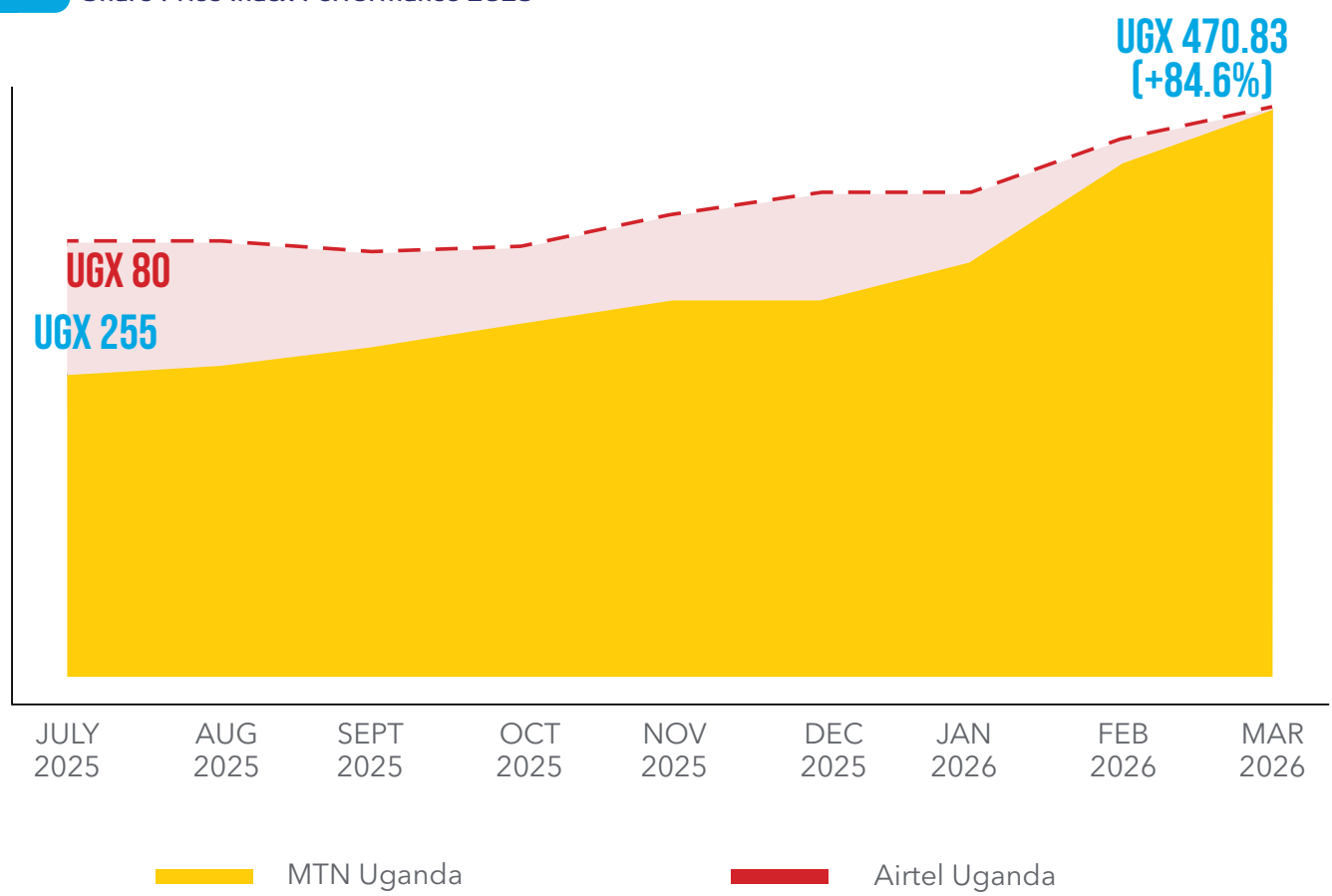
Uganda's telecommunications sector is served by two publicly listed operators on the Uganda Securities Exchange (USE): MTN Uganda Limited (ticker: MTNU), listed since 6 December 2021, and Airtel Uganda Limited (ticker: AIRTEL), listed since 7 November 2023. Both sit within the Mobile telecommunications sector on the exchange.

As at the end of 2025, MTN Uganda was the single most capitalized equity on the USE with a market capitalization of approximately UGX 10.5 trillion, representing 24.3% of the total USE equity market. Airtel Uganda ranks fifth in market capitalization at approximately UGX 3.44 trillion (9.58% of the USE equity market).

MTN Uganda (MTNU) recorded an exceptional rally over the nine-month review period, advancing 84.6% from UGX 255 in July 2025 to UGX 470.83 by March 2026. Momentum accelerated sharply between January and March 2026, coinciding with the publication of MTN Uganda's 2025 annual results.

Airtel Uganda (AIRTEL) demonstrated steadier but positive momentum, rising 30.0% from UGX 80 to UGX 104 over the review period. The USE All Share Index (ALSI) posted a year-todate gain of approximately 21.4% through April 2026, against which MTN Uganda's 84.6% advance represents a substantial outperformance of approximately 63 percentage points.

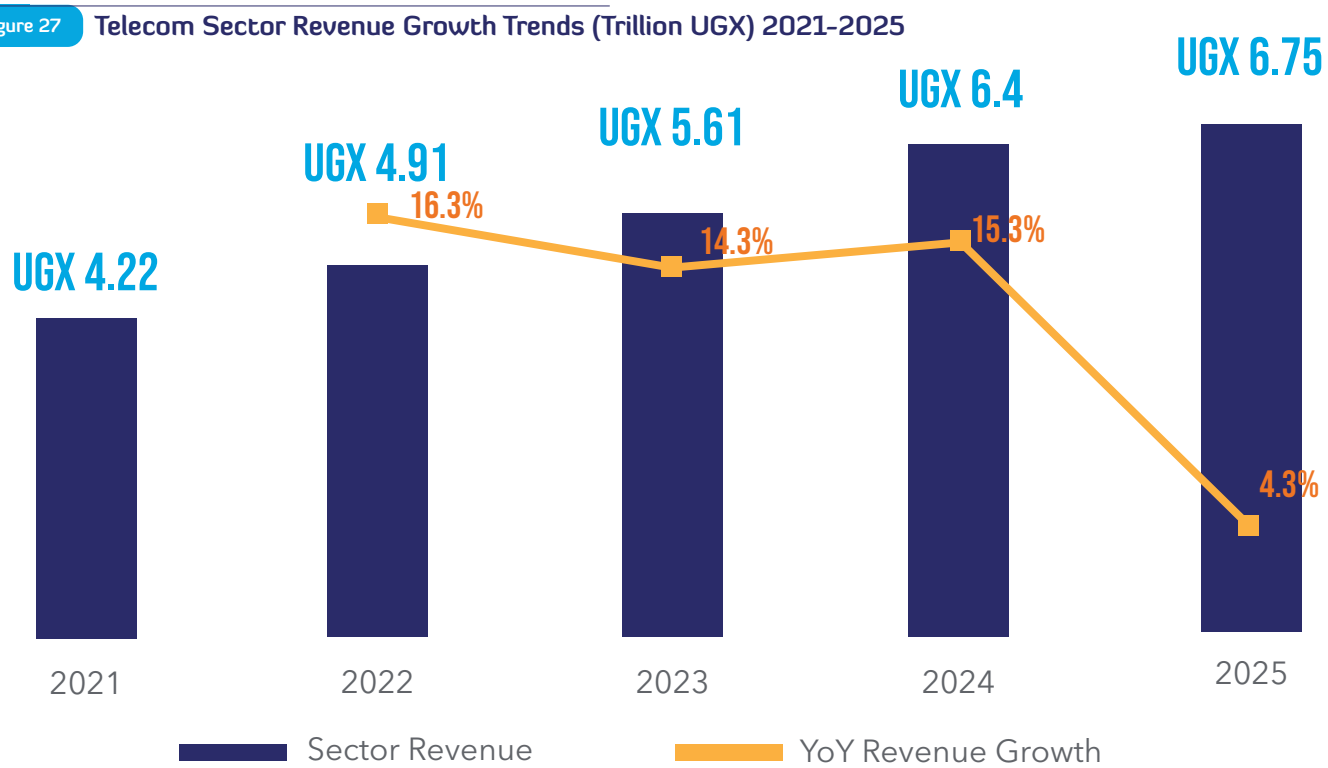
Figure 26 **Share Price Index Performance 2025**



Revenue Performance

Total operator-declared revenues emerging from Mobile Network Operators (MNOs), Internet Service Providers (ISPs), and Mobile Virtual Network Operators (MVNOs) are presented in the figure below.

Figure 27 Telecom Sector Revenue Growth Trends (Trillion UGX) 2021–2025



Sector revenues grew from UGX 4.22 trillion in 2021 to **UGX 6.75 trillion** in 2025, a five-year CAGR of over 12%. The 6% growth rate in 2025 is consistent with GSMA's projected annual mobile revenue growth band of 5–7% for Sub-Saharan Africa through 2030.

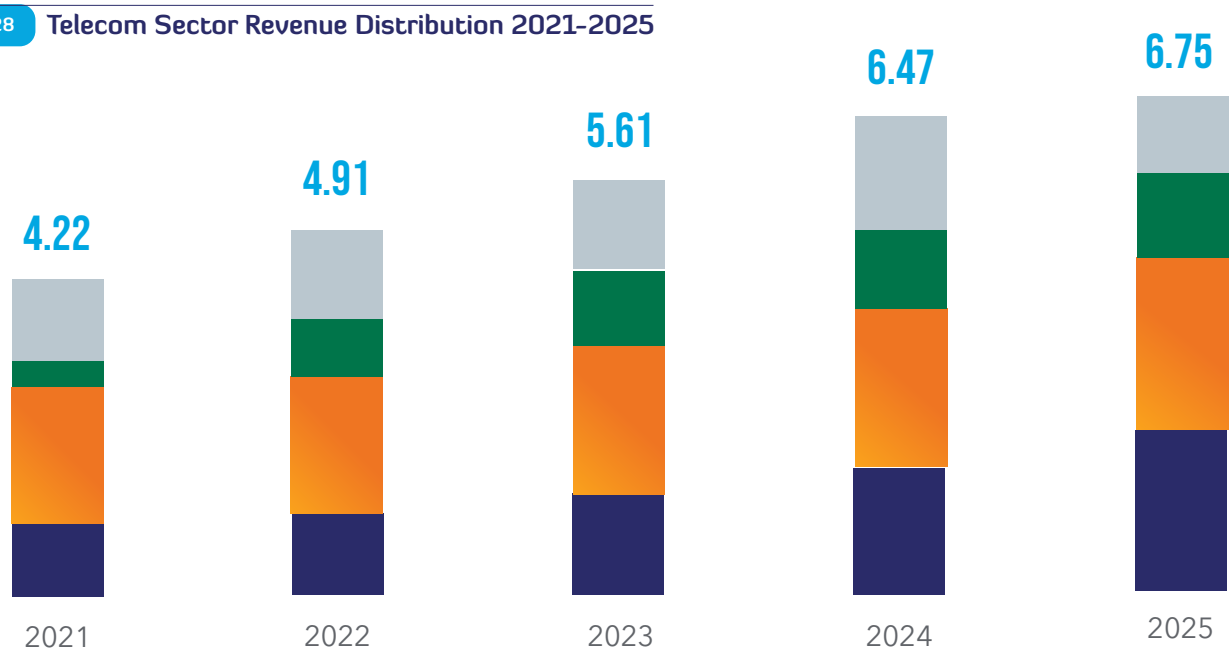
This revenue performance indicates near-saturation in certain urban demographic segments and signaling a shift from subscriber-led to value-led growth.



Telecom Revenue Distribution

The figure below presents the revenue share distribution across the sector's four primary service categories. SMS and other ancillary revenues are estimated as the residual between total sector revenue and the three declared revenue streams.

Figure 28 Telecom Sector Revenue Distribution 2021-2025



Data Revenue – Structural Growth Driver

Data revenue grew from UGX 1.002 trillion in 2021 to UGX 2.166 trillion in 2025, a five-year CAGR of approximately 21.2% and a 27% increase between 2024 and 2025. Data now accounts for 32% of total sector revenues.

Voice Revenue – Largest but Declining in Share

Voice revenue remains the single largest category at UGX 2.332 trillion (34% of sector revenues) in 2025, growing 10% from 2024. However, its relative share declined from 41.9% in 2021 as data monetization accelerates.

Uganda's large prepaid subscriber base of 47 million active subscriptions and relatively limited OTT penetration outside urban centers sustain voice's commercial importance. Further, growth in offnet traffic (+33.0%) signals improving market interconnection and voice service sustainability.

Tower Lease Revenue – Infrastructure Monetisation

Tower lease revenue grew from UGX 0.329 trillion in 2021 to UGX 1.166 trillion in 2025, a five-year CAGR of 37.2%.

This reflects the formalization of passive infrastructure sharing and towerco co-location agreements. The MTN-Airtel network-sharing pact of March 2025 is expected to moderate tower lease revenue growth in subsequent periods as asset duplication is reduced, while simultaneously deepening rural coverage.



23rd April 2025 - Telecom Towers Recognised as Critical Infrastructure

President Museveni committed to designating telecom towers as critical national infrastructure to curb vandalism and improve service reliability. Discussions with officials from the Ministry of ICT & National Guidance, and American Tower Company Uganda (ATC Uganda), emphasised extending electricity to remote tower sites as key to digital inclusion efforts.



Consumer Usage Profile

On-net Voice Traffic (Minutes)

1,956 ➡ 1,833

Offnet Voice Traffic (Minutes)

100 ➡ 133



SMS Volume

209 ⬅ 163

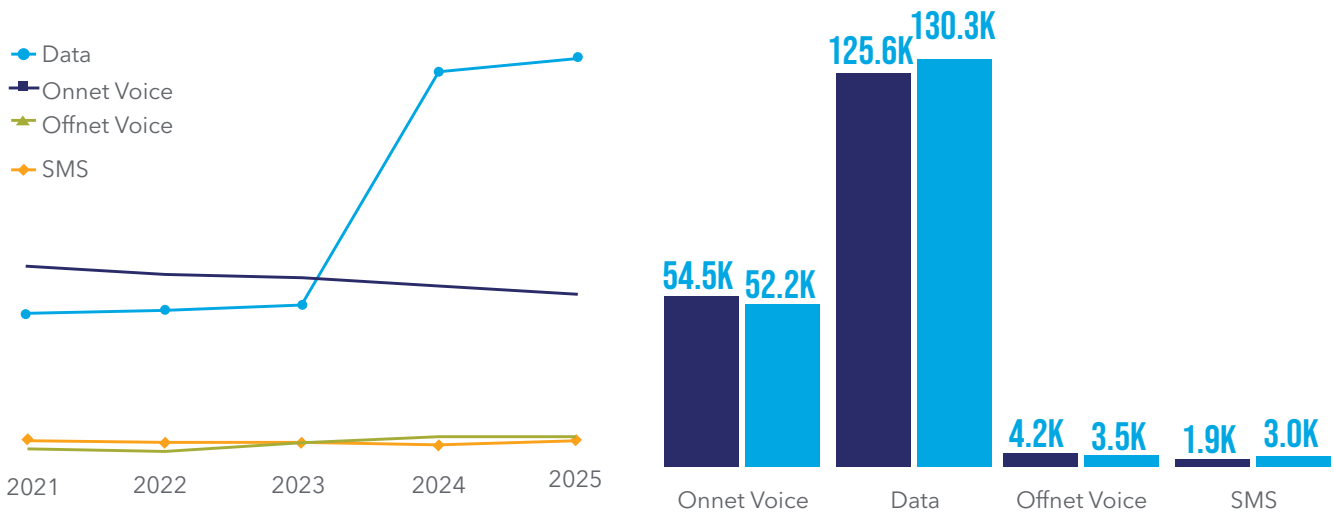
Data Volume (GBs)

58 ➡ 63

● 2024 ● 2025

Consumer Expenditure Profile

Figure 29 **Annual Consumer Service Usage in Mins, GBs, SMSs 2024-2025**



Data Expenditure

Data expenditure grew 3.7% from UGX 125,609 to UGX 130,315 per subscriber in 2025, following the 165.9% growth between 2023 and 2024 driven by pricing restructuring. At approximately USD 35–36 per year at prevailing exchange rates, this remains significant as a share of household income in lower-decile consumer segments.

On-net Voice Expenditure

On-net voice expenditure declined 4.0% from UGX 54,458 to UGX 52,183, consistent with the 6.3% fall in on-net traffic volumes. Despite this decline, it remains the second-largest expenditure category at UGX 52,183 per subscriber annually highlighting traditional voice's enduring role in Uganda's prepaid-dominated market.

Offnet Voice Expenditure

Offnet voice expenditure fell 16.5% from UGX 4,187 to UGX 3,498, despite a 33.0% increase in offnet traffic volumes. This reflects competitive tariff reductions that have lowered the effective per-minute cost of cross-network calls – a positive outcome for consumers.

SMS Expenditure

SMS expenditure reversed its multi-year decline, rising 60.3% from UGX 1,876 to UGX 3,007 per subscriber. This counter-intuitive increase against falling volumes confirms that A2P enterprise messaging is carrying a higher unit premium, consistent with patterns GSMA documents across Sub-Saharan African markets where SMS increasingly functions as a transactional and fintech notification channel.

Aggregate Consumer Spend

Total aggregate consumer expenditure per subscriber grew from UGX 186,130 to UGX 189,003 (+1.5%), a stabilization following the 71.5% jump between 2023 and 2024.

The structure of consumer spend has undergone a fundamental shift: data now represents 68.9% of aggregate consumer spend in 2025, versus approximately 43.6% in 2023, confirming the data-centric transformation of Uganda's telecommunications consumer market.

Child Online Protection in Uganda

81% of Ugandan children use the internet, and that the average child goes online for the first time at 13 years of age. Children access the internet daily or frequently, primarily via smartphones.

Balancing Digital Opportunities with Safety Imperatives

Uganda's communications sector has undergone a period of transformative growth. Mobile networks now extend into communities that were unserved a decade ago, data has become the sector's fastest-growing service, and digital platforms have woven themselves into the daily routines of ordinary households.

Uganda Communications Commission (UCC) market data record mobile data traffic crossing one billion gigabytes in a single year, fixed internet subscriptions growing by 114%, and the average subscriber now consuming 5.25 gigabytes of data each month, a level that exceeds the African average.

Behind these figures lies a demographic reality that changes what they mean. Children account for close to half of Uganda's population. Every gain in coverage, affordability and speed therefore reaches children early, and often reaches them before it reaches the adults responsible for guiding them.

Ensuring Child Online Protection (COP) is consequently not merely a regulatory obligation, but is a national imperative for safeguarding Uganda's future. The Commission continues to lead efforts to create a secure digital environment that maximises the benefits of connectivity while mitigating its risks. This contribution to the annual sector report examines the prevailing market concerns, the Commission's strategic interventions, and practical guidance for parents, schools and leaders in addressing COP challenges.

Market Context and Emerging Concerns

Internet adoption among Ugandan children has grown, as documented in UCC's landmark National Survey on Children's Internet Behaviour. The survey gathered evidence from children aged 6 to 17 years, parents and guardians across 96 districts, and remains a key baseline of how children actually use the internet.

Its central finding is that 81% of Ugandan children use the internet, and that the average child goes online for the first time at 13 years of age. Children access the internet daily or frequently, primarily via smartphones. The home is the dominant access point, followed by schools, with urban–rural and gender disparities. The picture that emerges is that of a generation that is broadly connected, connected young, and connected largely on personal devices that are difficult for adults to observe.





Internet adoption among Ugandan children

As documented in UCC's landmark National Survey on Children's Internet Behaviour. The survey gathered evidence from children aged **6 to 17 years,** parents and guardians across **96 districts,** and remains a key baseline of how children actually use the internet.

Key market concerns include

1. High exposure to risks. Children report encounters with disturbing content, cyberbullying, unwanted sexual solicitations, and interactions with strangers. The 2020 survey found that 50.7% of children had encountered unwanted sexual content online, that is, one in every two children surveyed. Children also reported being treated hurtfully online, sharing personal information without understanding the consequences, and harbouring worries about their privacy, with these concerns particularly pronounced among girls.

2. Inadequate parental mediation. A pronounced gap exists between children's online lives and adult awareness of them. Only 34% of parents were aware of what their children were doing online, and only 9.1% used any form of parental control technology. In other words, roughly 2 in 3 Ugandan children use the internet without informed parental oversight, and more than 9 in 10 households have no technical safeguard in place. Economic pressures and limited digital literacy among some guardians compound the problem.

3. Platform and content proliferation. The rapid growth of social media, gaming, and user-generated content has significantly increased users' exposure to online harms, including hate speech, non-consensual intimate imagery (commonly referred to as "revenge pornography"), online grooming, and commercial exploitation. This trend became even more pronounced in 2025, with data traffic on TikTok increasing by 85% to 319.67 million gigabytes and Snapchat subscriptions growing by 56%. The rapid expansion of these platforms indicates their deep integration into the daily lives of Ugandans, particularly young people. However, because these platforms are owned and operated outside Uganda's jurisdiction, the borderless nature of the internet continues to limit the effectiveness of purely domestic regulatory interventions, necessitating stronger cross-border cooperation and innovative regulatory approaches to safeguard online users.

4. Infrastructure and equity issues. Even as penetration grows, inconsistent service quality, affordability barriers, and the absence of age-appropriate tools at public or shared access points heighten children's vulnerability. Children who rely on borrowed or communal devices are least likely to benefit from parental controls or safety settings. Emerging threats including sextortion, AI-generated content and increasingly convincing online scams and disinformation place further strain on the ecosystem. These concerns mirror global trends, but they are amplified in Uganda by the pace of digital inclusion, which has advanced faster than the safety infrastructure meant to accompany it. Closing that gap is the central purpose of the Commission's work in this area.



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UCC's Strategic Interventions to Mitigate Risks

UCC adopts a multi-pronged approach that answers each of the concerns above through regulation, education, collaboration and innovation:

1. Evidence-based policy and research. The National Survey on Children's Internet Behaviour established Uganda's baseline understanding of children's online experiences and directly shaped the Commission's priorities with emphasis on parental empowerment and sustained public awareness. UCC therefore integrates COP indicators into broader sector performance monitoring and its annual consumer engagements, and is working to refresh the national evidence base so that regulation continues to respond to how children use the internet today rather than how they used it at the time of the original study.

2. Awareness raising and capacity building. Nationwide campaigns delivered through the Communications Consumer Parliament, media partnerships and community outreach educate the public on online risks and safe practices, with tailored messages for children, parents, teachers and the wider public. The Commission's most recent consumer awareness campaign carried child online protection messaging to approximately 4.8 million people, engaged over 80,000 students through school programmes, sensitised more than 508 parents through different forums, and recruited 146 Child Online Protection Student Ambassadors to promote safe internet use among their peers. The campaigns consistently signpost reporting mechanisms, including toll-free lines and CERT channels, so that awareness translates into action.

3. Technical and regulatory measures. UCC's national Computer Emergency Response Team (CERT) works with local and international agencies to monitor and block harmful content, including child sexual abuse material. The Commission advocates for platform accountability, mandatory safety features and accessible parental control tools, and supports the development of locally relevant applications with age-based filtering while recognising that a control tool is only useful if Ugandan parents can find it, afford it and operate it.

4. Multi-stakeholder partnerships. UCC works with the Ministry of ICT and National Guidance, law enforcement agencies, technology companies, non-governmental organisations and regional bodies, in alignment with the International Telecommunication Union (ITU) Child Online Protection Guidelines. This work includes mobilising financing for safety innovations and strengthening the technical capacity of law enforcement to investigate and prosecute online offences against children.

5. Education and skills development. The Commission promotes digital literacy from the school level upward, covering operational skills, critical evaluation of online content, and responsible sharing. It supports teacher training and the integration of online safety into school programmes, on the principle that a child who can recognise a risk is better protected than a child who is merely shielded from it.

Looking ahead, the Commission's priorities are to consolidate these measures within a unified child online protection framework, scale the pilots that have proven effective, and use data from ongoing sector monitoring to adapt to evolving threats, particularly AI-generated content, deepfakes and increasingly sophisticated scams targeting young users.



Collective Responsibility: Roles of Parents, Schools and Leaders

Regulation alone cannot keep children safe online. The survey findings make clear where the greatest practical gains lie, with the adults closest to the child.

COP succeeds through shared accountability, and the following actions are within reach of every household, school and institution.

For Parents and Guardians

1. Engage actively. Talk openly with children about what they do and see online, review device and browsing history together, and agree clear rules on screen time and content. With only a third of parents currently aware of their children's online activities, conversation is the single most valuable intervention available.

2. Supervise and control. Utilising the parental controls already built into phones, browsers and applications, keeping devices in shared family spaces rather than bedrooms, and staying connected to children on the platforms they use.

3. Educate and monitor. Teach children to protect personal information, use strong passwords, and recognise warning signs such as secrecy about online contacts, sudden mood changes, unexplained gifts or airtime, or requests to meet in person. Report suspicions promptly through official channels.

4. Lead by example. Children model adult behaviour. Balanced, respectful and safety-conscious internet use by parents is itself a form of instruction.

For Schools and Educators

1. Curriculum integration. Embed age-appropriate digital safety lessons from primary level, covering cyberbullying prevention, privacy, digital footprints and ethical online conduct.

2. Safe environments. Provide supervised internet access, adopt and publish acceptable use policies, and establish clear reporting protocols. Train staff to identify pupils who may be at risk.

3. Community engagement. Convene parent workshops, establish peer mentoring and student ambassador programmes, and draw on UCC resources and partnerships to support them. Schools are the most efficient point at which to reach both children and their parents.

4. Infrastructure advocacy. Press for secure school networks and affordable devices supplied with safety features enabled by default.





For Leaders in Government, Community, Industry and Policy

1. Policy and legislation. Advance a unified child online protection framework with clear enforcement mechanisms, defined institutional responsibilities and coherent national coordination, replacing the fragmented protections currently spread across several statutes.

2. Investment and innovation. Fund research, locally developed technical solutions and sustained awareness programmes. Industry players should prioritise child-safe design and transparency, building protection into products rather than adding it after harm has occurred.

3. Coordination and enforcement. Strengthen inter-agency collaboration, including with CERT and law enforcement, to ensure rapid response, effective investigation and meaningful support for victims. Community and religious leaders can amplify safety messages through local forums where formal channels have limited reach.

4. Monitoring and adaptation. Track progress through data, evaluate what works, and respond to emerging risks while ensuring that protective measures continue to respect children's rights to education, information and expression.

Child Online Protection is integral to Uganda's digital economy and to the country's sustainable development objectives. The same connectivity that delivers education, opportunity and inclusion also carries risk, and the evidence shows that Ugandan children are encountering that risk today, at scale, and often without an informed adult beside them. Challenges persist, but UCC's ongoing initiatives combined with genuine stakeholder commitment position the nation to harness technology's benefits safely. Parents must prioritise engagement, schools must educate proactively, and leaders must invest strategically.

The Commission urges all Ugandans to participate actively. Report concerns through official channels, advocate for safer platforms and services, and contribute to awareness efforts in your own community. By working together, we can ensure that every Ugandan child explores the digital world with confidence and security.

Expert Perspectives on Child Online Protection in Uganda — an Interview with Dr. Byamah

1. What is the simple understanding of child online safety?

Child Online Safety is about what programs, policies, and tools can be put in place to protect children from dangerous effects of unregulated internet use.

2. What are the most significant child online protection risks currently affecting children in Uganda, and how have these evolved in recent years?

We are living in a digital era which is very useful. However, it can also be dangerous. Children are vulnerable and need to be protected. Scientifically, using internet has four broad categories of risk:

· **Content risk:** This refers to dangerous content in terms of promotion of violence, cyberbullying, inappropriate sex content, among others.

· **Contact risk:** This is in reference to who the children in contact with, and how much time the child spending online.

• **Conduct risk:** This is a category of risk arising out of the conduct of the people communicating with children online

• **Commerce risk:** this arises as a result of promotion of commerce leading to issues such as inappropriate commercial advertising.

3. What are the main drivers of child online safety risks?

The main drivers of these risks include:

· Unlimited available digital spaces: Internet access today is much more pronounced than it was sometime back. This means that children today have much easier access that years before.



· Availability of digital devices: The devices are available and much cheaper than before, making it easier for children to use them and access unsafe content.

· Depth of exposure and breadth of content: The internet space provides so much unfiltered content that can easily be accessed by children with less effort.

4. What are the health effects of communication devices on humans specifically children. Paint for us a picture of the damage?

Unlimited access to internet for children creates bigger demand than normal

· Makes the child want to continuously use internet putting then at risk of addition.

· The children experience sleep problems, withdraw, can become obese and also get detached from other members, etc

5. How effective are Uganda's existing legal and regulatory frameworks in protecting children online, and what key gaps still need to be addressed?

It should be appreciated that Uganda has various laws and regulations is that to some extent try to protect the internet users in general. However, specific laws need to be enacted to address the exposure of children to the digital spaces, and address the 4 risks indicated above: Content, Contact, Conduct, Commerce. The laws must as well speak to parents and guardians who are responsible for these children.

6. What roles should parents, schools, communications service providers, digital platforms, and government agencies play in strengthening child online protection in Uganda?

· For the start, there is need for integrated policies rather than disjointed ones, regarding child online protection.

· There is further need for dedicated budgets by MDAs on research on child online

· All audio-visual spaces should have campaigns dedicated to online use of communication services

· Curriculum must have tailored information for the different age groups

7. What progress has Uganda made in raising public awareness and improving digital literacy among children, parents, and teachers, and what challenges remain?

While the Uganda Communications Commission has made strides in promotion of the safety of an online child, the journey is a long one and needs the involvement of all stakeholders. At the end of the day, every citizen must be aware of the dangers of an online child and work towards their safety.

8. How are emerging technologies such as Artificial Intelligence (AI), social media algorithms, and encrypted messaging platforms changing the child online protection landscape in Uganda?

AI has revolutionised the technological space. While the effects of AI can be negative to a child, there can be a deliberate effort to develop AI models that promote the protection of children.

9. Looking ahead, what are your recommendations for strengthening Uganda's Child Online Protection framework over the next five years to ensure a safer digital environment for children?

I would like to recommend the following in the short to medium term:

· The government and other responsible authorities should build on what is already available to come up with a more responsive framework

· The awareness campaign should aggressively be pursued.

· Authorities should work very closely with schools and parents

· There should be a digital literacy campaign for both parents and children. Specific programs should be designed for both parents/guardians and children.

· Government should look into regulation of the digital space, however uncomfortable it may be.

· There is need for investment in online materials.

Postal and Courier Services

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.

Membership to the Universal Postal Union

Established in 1874 and headquartered in Berne, Switzerland, the Universal Postal Union (UPU) is the world's second oldest United Nations organization after International Telecommunications Union (ITU). With 192 member countries, represented through their respective line Ministries, the Regulators and the National Designated Postal Operators, the UPU serves as the primary forum for cooperation among global postal sector stakeholders.

It plays a central role in maintaining a universal postal network that delivers modern, reliable services, while providing advisory, coordination, and technical assistance. The UPU also sets standards for international mail exchange and develops recommendations aimed at enhancing mail, parcel, and financial services, as well as improving overall service quality. The UPU comprises four key bodies:

The Congress	The supreme authority of the UPU, convening every four years.
The Council of Administration	Ensures continuous UPU operations between Congresses, overseeing activities and addressing regulatory, administrative, legislative, and legal matters.
The Postal Operations Council	Comprising 48 member countries, elected during Congress, it acts as the technical and operational core of the UPU.
The International Bureau	Serving as a secretariat, it provides logistical and technical support to UPU bodies.

The Council of Administration

The Council of Administration (CA) consists of 41 member countries and meets annually at UPU headquarters in Switzerland. The CA ensures the continuity of the Union's work between UPU Congresses by supervising its activities and addressing regulatory, administrative, legislative, and legal matters.

In this regard, the CA approves proposals submitted by the Postal Operations Council (POC) for the adoption of regulations or new procedures pending consideration by the next Congress. Additionally, it is responsible for promoting and coordinating all aspects of technical assistance among member countries.

Uganda Membership to the CA for 2025-2029 Cycle

During the 28th Universal Postal Congress held in Dubai, United Arab Emirates, in September 2025, Uganda was elected to the Universal Postal Union Council of Administration for the 2025–2029 cycle, having previously served during the 2013–2017 and 2017–2021 cycles. Uganda secured 129 votes, ranking third out of 15 African countries that contested for the Council member position. With only 11 seats allocated to Africa (Group V), this strong performance underscores the country's credibility, influence, and commitment to contributing to global postal governance.

Uganda's successful election was anchored on its demonstrated capacity and sustained commitment to advancing the development of the communications sector. At a time when communications infrastructure and services are critical drivers of socio-economic transformation, Uganda's participation in the Council is expected to contribute meaningfully to the strategic direction, development, and continuous improvement of the Union.



Uganda Elected to UPU Council of Administration

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Uganda's Role as a Member of the UPU and Council of Administration (CA)

In Uganda, the designated postal operator is Uganda Post Limited (UPL) while national representation at the UPU is undertaken by the Government of Uganda, coordinated through the Uganda Communications Commission (the Commission) as the sector regulator. This institutional arrangement ensures alignment between policy, regulation, and operational delivery of postal and courier services.

As a member of the CA, Uganda plays a strategic role in shaping global postal policy and representing the interests of developing and landlocked countries. Its engagement has been focused on key reform areas. These areas include advocating for equitable postal remuneration systems; contributing to the Integrated Product Plan (IPP) (modernization of postal services); and promoting stronger mail conveyance and airline partnerships (improved connectivity, reduced transit times, and enhanced affordability).

Through membership and participation, Uganda has contributed practical experience to global discussions on cross-border e-commerce and the digital postal economy, including progress in Electronic Advance Data (EAD) implementation and customs pre-clearance systems. In parallel, Uganda has participated in international initiatives such as Operation African Star, strengthening postal security and consumer protection through joint enforcement against illicit trade.

Uganda's active role in the UPU has translated into tangible national benefits. Through UPU development programmes, such as the Quality-of-Service Fund (QSF), the country has strengthened its postal infrastructure through the purchase of delivery vehicles, security equipment, and Information and Communication Technology (ICT) tools. In addition, the fund has facilitated the enhancement of operational efficiency, service quality, and customer responsiveness through the Global Monitoring System (GMS), International Postal System (IPS), and Global Customer Service System (GCSS).

In the area of trade facilitation, Uganda has leveraged the Postal Customs Declaration System (CDS) to streamline customs clearance and improve cross-border e-commerce. Ongoing efforts to integrate CDS with national customs platforms are expected to further enhance efficiency, transparency, and coordination. These developments have been complemented by broader digital transformation initiatives under the UPU Smart Post Programmes, including digital addressing, e-services, virtual post boxes and global track-and-trace capabilities that have positioned Posta Uganda competitively in the e-commerce ecosystem.

To sustain these reforms, Uganda is currently reviewing its national regulatory framework, drawing on global and regional benchmarks from the UPU and the Pan African Postal Union (PAPU). The review aims to align the sector with emerging trends such as home and last-mile delivery, e-commerce, digitalisation, and evolving market structures.

Regionally, Uganda has reinforced its leadership within Africa through active participation in the PAPU where it holds the position of Assistant Secretary General. These roles have strengthened regional collaboration, policy influence and knowledge sharing while supporting efforts to address common sector challenges and promote regional integration.

Overall, Uganda's membership on the CA enhances international visibility and coordination between the regulator and operator, enabling the country to contribute meaningfully to a more inclusive, efficient, and future-ready global postal system.

Looking Ahead

Uganda is benchmarking and improving its postal services through coordinated engagement at regional, continental, and global levels, mainly via the Pan African Postal Union (PAPU) and the Universal Postal Union (UPU), where it exchanges best practices on postal modernization, e-commerce logistics, digital addressing, and service quality standards.

Domestically, the Commission and Uganda Post Limited (UPL) are driving reforms to transform post offices into integrated logistics and service hubs through ICT-enabled systems, track-and-trace solutions, and expanded service offerings. These efforts are further supported by regulatory strengthening and market competition pressures, with the overall objective of transitioning Uganda's postal sector from traditional mail delivery to a modern, efficient, and digitally driven logistics and e-commerce platform aligned with international best practice.



Post and Courier Access and Usage

The postal and courier sector in Uganda experienced a year of significant activity in 2025, characterized by a sharp divide between traditional mail services and the rapidly expanding domestic courier and e-commerce delivery market. While traditional letter volumes show a long-term structural shift, the total number of items handled across the sector saw substantial growth, driven largely by private courier players and international inbound traffic.

1.4 MILLION
Deliveries

*The total number of items delivered countrywide in 2025 reached approximately **1,426,979 units**. This represents a massive leap compared to the 2024 total of 1,039,105 units. This growth is primarily attributed to the onboarding of digital-native courier services (like Glovo, SafeBoda, and YellowBird) and a more robust reporting framework for international shipments.*

The National Postal Operator (Uganda Post Limited)

Uganda Post Limited (UPL) remains the backbone of the letters or traditional mail category, largely due to its universal service mandate, nationwide physical infrastructure, and its role in handling official, legal, and government correspondence. However, letter volumes declined from 395,309 in 2024 to 285,803 in 2025, representing a significant contraction in demand.

While UPL continues to dominate this segment, the decline underscores a transitional phase rather than a sustainable growth trajectory, consistent with global trends between 2024 and 2025, which show a decisive shift away from letters toward parcels, logistics, and digital communication platforms.

Ordinary Letters (Mail)

Domestic Ordinary Letters

Domestic ordinary letters support the Universal Service Obligation (USO) by providing affordable and accessible communication, especially for underserved populations. The increase from 19,308 to 33,280 represents a 72.4% growth, highlighting rising reliance on this low-cost service and reinforcing its importance in ensuring inclusive access despite broader declines in traditional mail.

This growth is largely driven by public institutions, particularly educational institutions which rely on the service to send items such as certificates, calendars, diaries among others given its affordability and nationwide reach.

Figure 30 Domestic Ordinary Letters

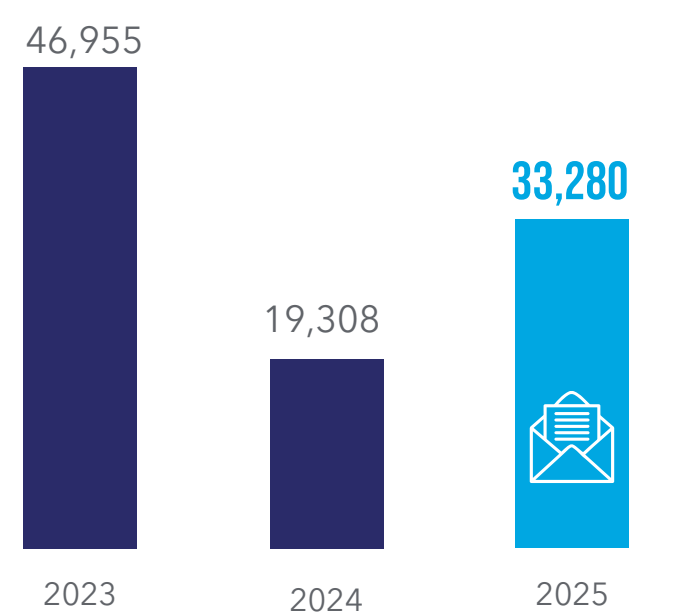
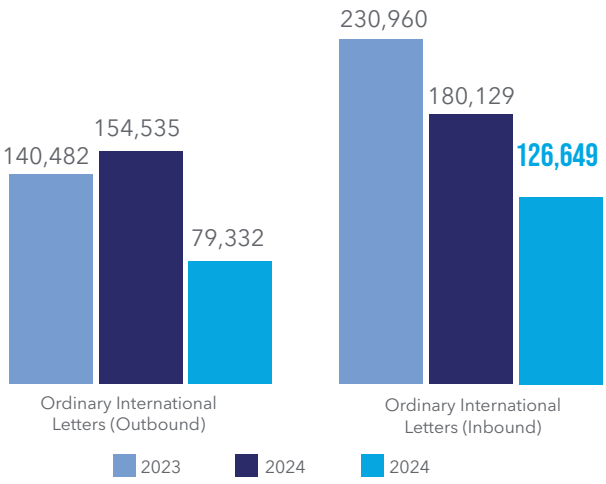


Figure 31 Domestic Ordinary Letters



Ordinary International Letters (Inbound and Outbound)

The data reveals a period of initial growth followed by a sharp decline in the volume of international outgoing mail handled in Uganda. In 2025 the volume plummeted from 154,535 to 79,332, representing 49% decrease from the previous year. This brings the mail volume to its lowest point in the three-year recorded period.

The sharp declines in both outbound (-49%) and inbound (-30%) international ordinary letters are consistent with global postal trends and can be explained by a combination of structural and operational factors.

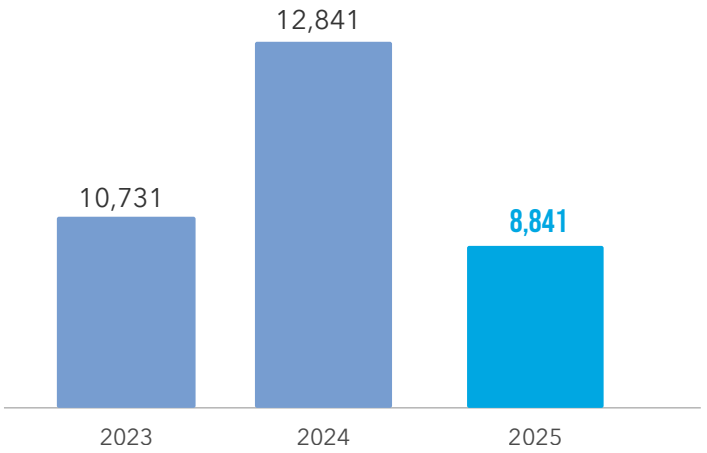
Outbound and Inbound Ordinary Letters Volume

The decline is primarily driven by digital substitution, as traditional international letter mail has been largely replaced by email, messaging platforms, and electronic document sharing for both personal and business communication.

Registered Letters (Mail)

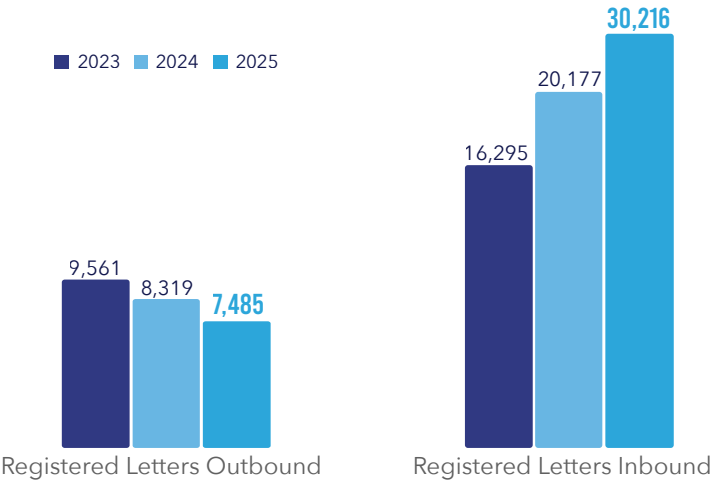
In Uganda, Registered Mail is a premium service often used for the secure transmission of legal documents, land titles, academic transcripts, and official government correspondence. 2.3.1 Registered Mail Domestic

Figure 32 Registered Mail Domestic



Data indicates a significant fluctuation in the volume of domestic registered mail over the three-year period. While 2024 was a year of growth, the service is currently facing a contraction, mostly due to the rapid digitization of the Ugandan administrative and business landscape.

Figure 32 Registered Mail International

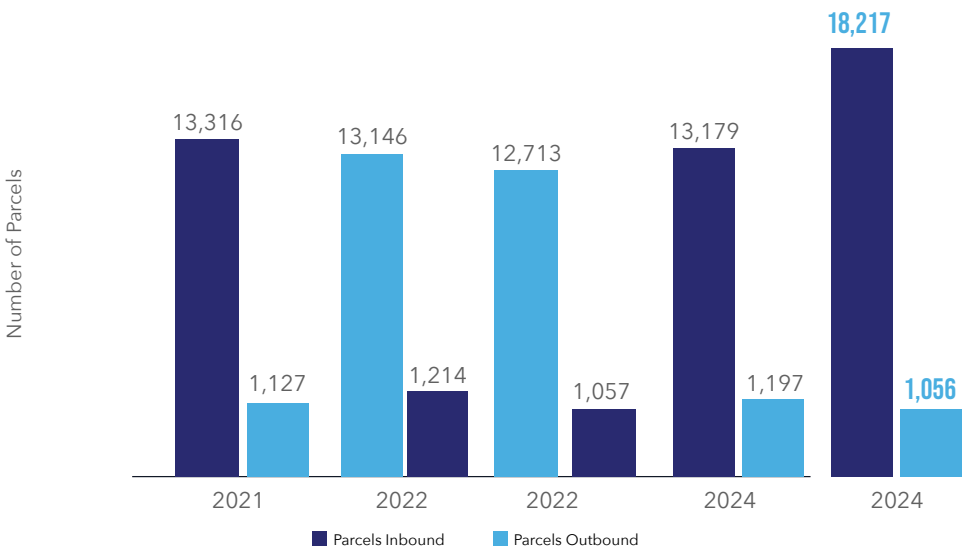


The 10% decline in outbound mail observed in 2025 reflects a structural shift driven by digital transformation and evolving market dynamics.

Inbound mail increased by 49.8% in 2025 as a result of increased reliance on secure and verifiable communication channels for legal and formal transactions in e-commerce ecosystems.

International Parcels

Figure 33 **International Parcels**



> While inbound volumes hit record highs in 2025, outbound volumes decreased from their 2022 and 2024 levels, suggesting a need for further support in the domestic export logistics sector.

The data reveals a logistics landscape heavily dominated by Inbound Parcels, which consistently dwarf Outbound Parcels. While both metrics have seen growth since 2021, the scale of operation for inbound parcels is significantly larger.

Inbound Parcels:

Inbound parcel volumes have shown a general upward trajectory, though with notable periods of fluctuation. Between 2021 and 2024, volumes remained relatively stable, fluctuating slightly between 12,713 and 13,316 units. 2025 saw a massive spike in activity, reaching a peak of 18,217 inbound parcels (38% increase from the previous year).

The substantial rise in inbound parcels, particularly the surge in 2025, likely reflects the growing adoption of international e-commerce platforms by Ugandan consumers.

Outbound Parcels:

Outbound parcels represent a much smaller fraction of total postal activity, typically accounting for less than 10% of the volume of inbound parcels in any given year. Between 2021 and 2024, volumes remained relatively stable, fluctuating between 1,057 and 1,214 units. 2025 saw a slight decline in activity with 1,056 outbound parcels recorded (12% decrease from the previous year).

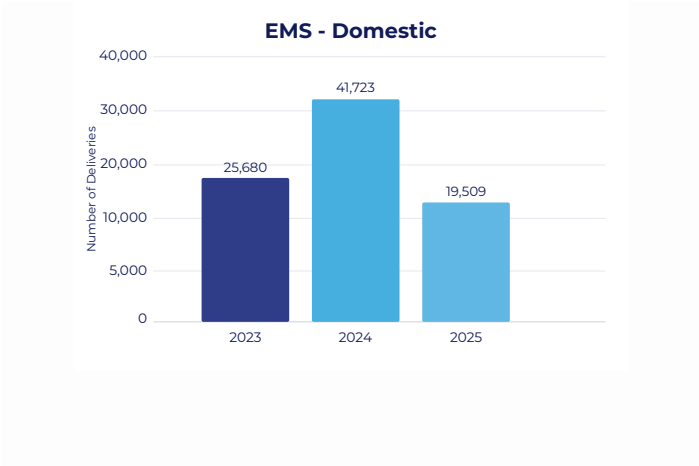
Expedited Mail Services

Expedited Mail Services (EMS) is a global brand that represents the fastest cross-border postal service for documents and merchandise, prioritised over other mail items and adheres to international standards for speed, reliability and security.

Since 2023 EMS in Uganda has experienced a significant volatility in domestic logistics and a steady, positive trajectory for outbound mail.

EMS Domestic

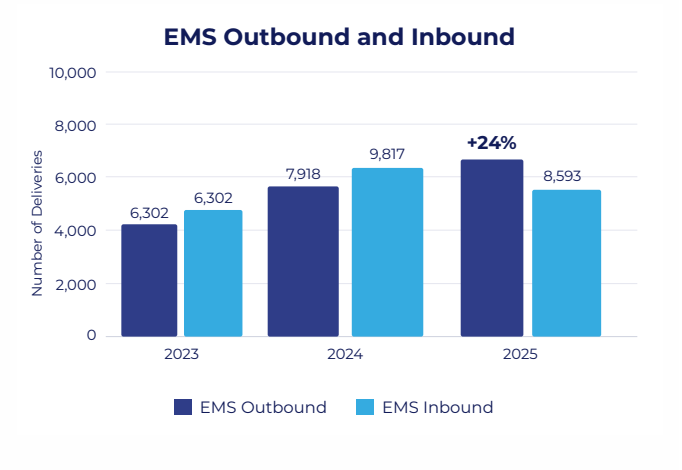
Figure 34 EMS Domestic



In 2025, domestic traffic plummeted from 41,723 to 19,509, which reflects a drop of 53%. This shows a shift toward private couriers who currently cover a bigger percentage of the courier business in Uganda.

EMS international (inbound and Outbound)

Figure 35 EMS International (Inbound And Outbound)



EMS Outbound

The volume of EMS outbound items showed a steady upward trend from 7,918 in 2024 to 9,844 in 2025, an increase of 24%. This consistent growth indicates that Ugandan businesses and individuals are increasingly utilizing EMS for international trade and time-sensitive documentation, even as domestic patterns fluctuate.

EMS Inbound

There was a slight decrease from 9,817 in 2024 to 8,593 in 2025, reflecting a decrease of 12%. This minimal change indicates continued reliance on the formal postal network for inbound expedited shipments.

2.6 Courier Services

The global courier industry is expanding rapidly and is projected to reach approximately USD 782 billion by 2034, largely driven by the growth of e-commerce. In contrast, traditional mail services continue to experience structural declines in letter volumes, as courier services increasingly become the preferred option for parcel delivery due to their greater speed, reliability, and advanced tracking capabilities.

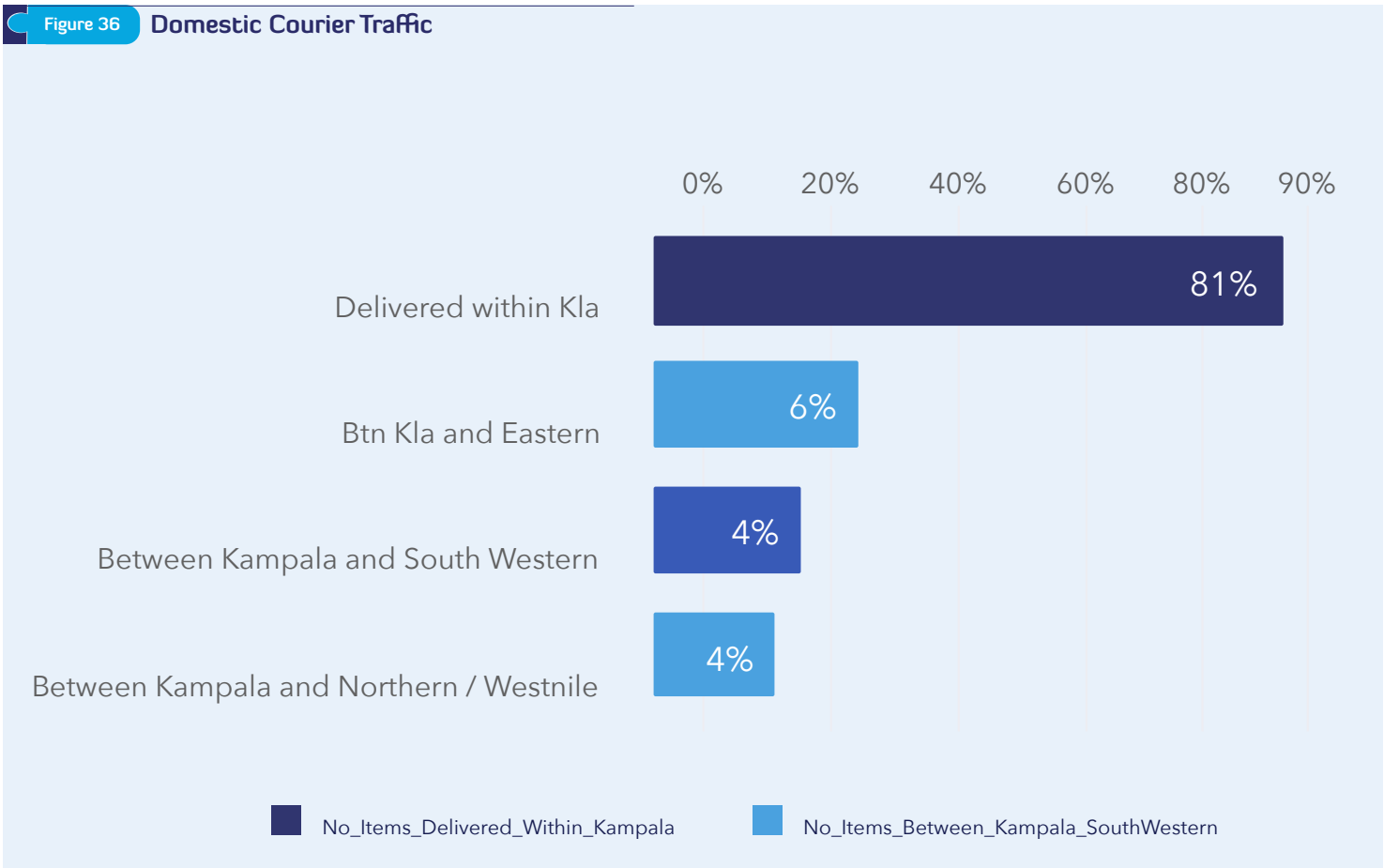
Domestic Courier Traffic

A defining feature of 2025 was the volume contribution from non-traditional courier entities.

SafeBoda & Glovo handled significant domestic volumes, particularly within the Kampala metropolitan area. For instance, SafeBoda saw its monthly volumes grow from 9,584 in July 2025 to over 16,800 by December 2025.

Regarding regional distribution the data shows a heavy concentration of deliveries within Kampala (81%), though there was an increased movement towards Northern/West-Nile and Southwestern regions as logistics networks improve.

Figure 36 **Domestic Courier Traffic**



Expedited Mail Services

From a comparative perspective, countries such as Kenya have moved more aggressively to formalize and digitize domestic courier services. Posta Kenya, for example, has integrated mobile payment systems and digital tracking into its service offering, enabling it to better compete in the evolving logistics landscape.
Source:

International Courier Traffic

International courier traffic remains the highest-value segment of the industry. In the world of logistics, this segment acts as a barometer, a sensitive instrument measuring the pressure and health of Uganda's integration into global trade.
The data reveals a system progressively connected to global supply chains but heavily skewed toward inbound flows, which saw a 38% increase in parcel volumes. This surge is directly linked to the expansion of global e-commerce. However, this "inbound dominance" signals a structural imbalance: Uganda remains a net consumer in the digital economy.

International Inbound Courier Traffic

Inbound courier traffic grew significantly, with parcel volumes increasing by 38% over the review period. This trend reflects the rapid expansion of cross-border e-commerce, which has become a major driver of logistics demand globally (United Nations Conference on Trade and Development, 2023).

Most regions recorded declines, indicating a contraction inbound courier volume. The most significant drop is from East Africa (38,329 to 30,711 representing a 20% decline), which remains the largest source but shows reduced regional trade or consolidation of shipments. Similarly, South America and North America declined by 41% and 5% respectively indicating weakening inflows from distant markets or a shift towards bulk shipping rather than courier channels.

- Asia (19,120 to 25,667; +34%) shows strong growth, reinforcing its position as a key trade partner. This likely reflects Uganda's increasing reliance on Asian e-commerce platforms and imports of low-cost consumer goods.
- Rest of Africa (5,314 to 8,469; +59%) also grew significantly, pointing to strengthening intra-African trade, possibly supported by regional integration efforts and crossborder commerce.
- Europe remains relatively stable (22,173 to 22,765; marginal growth), indicating consistent but mature trade flows.
- Australia, though small in volume, grew, suggesting niche or specialized trade links.

The growth in inbound traffic is closely linked to; increased access to international online marketplaces; rising consumer demand for imported goods; and strong diaspora linkages However, this growth reveals a structural imbalance, with Uganda functioning primarily as a net importer in the courier ecosystem. Outbound volumes remain comparatively low, limiting participation in global value chains.

Operationally, customs clearance processes remain a key bottleneck. According to the World Customs Organization, inefficient border procedures significantly affect delivery timelines in developing markets, reducing competitiveness and customer satisfaction.

Globally, postal operators such as Royal Mail and United States Postal Service have addressed similar challenges through automation, data integration, and international logistics partnerships. In Uganda, improving cross-border efficiency will be critical in sustaining growth in international courier traffic.

International Outbound Courier Traffic

There was a notable decline in Uganda's international outbound courier traffic between 2024 and 2025, with a few markets showing growth.

There was a clear contraction in outbound volumes, particularly to East Africa (35,521 to 22,026; -38%), which remains the dominant destination but experienced the sharpest drop. Declines were also evident in North America (-21%) and Australia (-8%), suggesting reduced demand and/or a shift in how exports are fulfilled to these markets.

Regional performance and shifts

- Europe shows marginal stability/growth (around 19,000+ in both years), indicating sustained trade links, likely tied to formal exports and diaspora-related shipments.
- Asia (6,170 to 7,750; +26%) recorded strong growth, reflecting expanding trade ties and possibly increased re-exports or business linkages.
- Rest of Africa (4,459 to 6,441; +44%) highlights strengthening intra-African trade, consistent with regional integration trends.
- Middle East (2,344 to 4,052; +73%) shows the fastest growth, likely driven by labor export markets and diaspora connections.
- South America also grew, though from a low base, indicating emerging or niche trade routes.

Weight of Courier Items

The evolution of courier item weight provides a more precise indication of how the postal and courier sector is responding to changing economic and consumption patterns. Unlike item volumes, which reflect transaction frequency, weight trends offer insight into the scale, value, and commercial nature of goods moving through the logistics system.

Between 2024 and 2025, the total weight of courier items handled increased from 711,062 to 793,360, representing a growth of 11.6%. This expansion points to a broadening role of courier services in supporting trade and commerce.

Inbound Courier Items

Inbound courier weight increased from 506,205 in 2024 to 553,176 in 2025, representing a 9.3% growth. Inbound traffic remains the largest component of total courier weight, accounting for the majority share of goods handled through the courier network. This reflects the continued flow of goods into the country through courier channels; particularly small parcels associated with international trade and e-commerce. The sustained dominance of inbound weight confirms that courier services continue to play a significant role in supporting the distribution of imported goods within the domestic market.

Outbound Courier Items

Outbound courier weight increased from 204,857 in 2024 to 240,184 in 2025, representing a 17.2% growth. This is the highest growth rate among the three categories and indicates an increase in the volume of goods being sent out of the country through courier channels.

Although outbound weight remains lower than inbound weight in absolute terms, the higher growth rate reflects increased utilization of courier services for outward shipments, including business consignments, documentation, and small-scale exports.

The increase in total courier weight reflects a broadening use of courier services for the movement of goods, particularly parcels. This is consistent with global developments, where postal and courier networks are increasingly driven by parcel logistics rather than traditional mail. The Universal Postal Union (2024) notes that growth in postal sector activity is largely supported by increases in parcel volumes and associated logistics services.

The continued dominance of inbound weight confirms that Uganda remains a net recipient of courier-based shipments, while the stronger growth in outbound weight indicates increased participation in outward logistics flows.

3.0 Postal and Courier Finance

The year 2025 recorded strong expansion in both domestic and international postal and courier service revenues. Overall, total sector revenue increased significantly from UGX 13.29 billion in 2024 to UGX 22.94 billion in 2025, reflecting sustained growth in demand for delivery and logistics services across the country and in international markets.

Domestic revenue registered the most remarkable growth during the period under review. It increased from UGX 4.76 billion in 2024 to UGX 9.27 billion in 2025, representing a 94.7% increase. This sharp rise reflects the rapid development of Uganda's local courier ecosystem, particularly in last-mile delivery services.

The growth was largely driven by the expansion of local e-commerce activity, increased demand for same-day delivery services in urban areas, and improved formalization and reporting within the domestic courier segment.

International revenue continued to be the largest contributor to total sector earnings. It grew from UGX 8.53 billion in 2024 to UGX 13.67 billion in 2025, reflecting a steady growth rate of 60.2%.

International services accounted for 60% of total sector revenue in 2025, highlighting their continued importance in facilitating cross-border trade and linking the local economy to global supply chains. Growth in this segment was supported by increased import and export activity as well as sustained demand for international parcel and courier services.



UCC Executive Director Hon. Nyombi Thembo reminded participants at Uganda's inaugural Postal & Courier Baraza 2025 that couriers are not mere background actors, but the silent engines powering the country's e-commerce growth, effectively linking rural dreams to national markets and economic progress.

Key Financial Drivers

- **Surge in Domestic Activity:**
  Domestic revenue recorded exceptional growth of 94.6% in 2025. This reflects a sharp increase in the uptake of local courier services, driven by the continued formalization of the last-mile delivery ecosystem, rapid growth in ecommerce activity, and increased consumer confidence in local delivery networks. Urban demand for fast and reliable same-day delivery services has further strengthened this segment.

- **Strengthened International Trade:**
  International services remained the dominant revenue contributor, accounting for approximately 60% of total sector earnings in 2025. The 60.3% growth in this segment highlights the continued recovery and expansion of cross-border logistics, supported by rising import and export activity and the growing integration of Ugandan businesses into regional and global supply chains.

- **Expansion of the Digital Economy:**
  Increased digital adoption across businesses and consumers has significantly boosted courier demand. The growth of online retail platforms, social commerce, and digital service delivery has increased the movement of parcels, documents, and goods, reinforcing the role of courier services as an essential enabler of the digital economy.

- **Growth of SMEs and Informal Enterprises:**
  Small and medium-sized enterprises have become key users of courier services, particularly in sectors such as fashion, electronics, agriculture, and pharmaceuticals. The transition of informal businesses into structured operations has widened the customer base and increased recurring delivery volumes.

- **Operational Scale and Service Enhancement:**
  The strong revenue growth relative to shipment volumes suggests improved pricing strategies, service diversification, and a shift toward higher-value deliveries. Operators are increasingly offering premium services such as express delivery, real-time tracking, and integrated logistics solutions, contributing to higher revenue per shipment.

- **Improved Sector Formalization:**
  Enhanced regulatory compliance and increased licensing of courier operators have strengthened revenue capture and improved sector transparency. This has reduced informality in the market, allowing for more accurate reporting and better alignment of industry performance with actual market activity.



Strategic Interventions in the Post Courier Sector in 2025

The courier industry stands at a critical turning point, undergoing significant year-on-year transformation driven by rapid technological advancements, evolving consumer expectations, and shifting global trends. It is important for the industry to recognize emerging developments to secure a competitive edge, optimize operational efficiency, and effectively position themselves within the increasingly dynamic logistics ecosystem.

Recently, the sector continued to play a significant role in supporting trade, financial inclusion, and digital transformation. Notably, 2025 introduced a renewed strategic priority, with greater emphasis on customer satisfaction and overall service experience. Intensifying competition and growing market pressures have increasingly compelled postal and courier operators to prioritize customer satisfaction and strengthen first- and last-mile delivery solutions, which are now critical determinants of customer retention and acquisition. However, gaps remain in infrastructure, service quality, innovation adoption, and environmental sustainability. To address these challenges and position Uganda competitively within the regional and global logistics ecosystem, several strategic interventions have been prioritized.

a) Digital Transformation and Increased Use of Technology

In the rapidly evolving post and parcel landscape, artificial intelligence is increasingly being recognised as a critical enabler of competitiveness rather than a discretionary advantage. As noted by Charles Brewer, CEO of Pos Malaysia, AI is central to driving efficiency through route optimisation, demand forecasting, automation, sorting processes, and enhanced customer journey management, ultimately delivering greater accuracy, speed, and responsiveness in an environment where adaptability defines success.

In Uganda, these global trends are being progressively reflected in ongoing sector modernisation efforts. The country has intensified its adoption of digital technologies within the post and courier sector, with designated operators and licensed courier service providers increasingly deploying real-time tracking systems, electronic data interchange (EDI), and automated tracking and monitoring solutions to improve operational efficiency and service reliability.

In addition, the Government and the Regulator are actively promoting the use of integrated digital platforms that support e-commerce logistics and enable greater interoperability between postal networks and private courier operators. These interventions are designed to enhance end-to-end visibility across the delivery chain, reduce delays, strengthen accountability, and ultimately improve customer satisfaction within Uganda's evolving logistics ecosystem.

b) Sustainability and Green Logistics Initiatives

As the world becomes increasingly mindful of environmental impacts, the shift toward electric vehicles in the courier industry continues to gain momentum. In 2025, electric courier vans and bikes were widely adopted, offering zero-emission alternatives to traditional fuel-powered vehicles. This transition not only aligns with global sustainability goals but also reduces maintenance costs and fuel expenses for courier companies. In line with global commitments to environmental sustainability, Uganda's post and courier sector is progressively adopting eco-friendly practices. Key interventions include the gradual introduction of fuel-efficient and electric delivery bicycles, particularly within urban centres such as Kampala, Entebbe and Mukono towns and the optimisation of delivery routes to reduce delivery times in the congested towns contributing to the NDPV plan to increase the number of green jobs from 210,000 in FY2023/24 to 650,000. These initiatives not only contribute to environmental conservation but also align Uganda's postal

ecosystem with international best practices, enhancing its attractiveness to environmentally conscious partners and customers.

c) Expansion of On-Demand and Last-Mile Delivery Services

The rapid growth of e-commerce in Uganda has driven increased demand for flexible and timely delivery services. In response, courier operators are expanding their offerings to include same-day and next-day delivery solutions, particularly within major urban and periurban areas. Innovations such as pick-up/drop-off points and partnerships with informal delivery networks (including boda-boda riders) are being explored to strengthen last-mile connectivity and timeliness. These approaches are critical in addressing logistical challenges posed by traffic congestion, informal addressing systems, and hard-to-reach rural communities.

d) Enhancement of Customer Experience and Service Quality

Improving customer experience remained a central focus of sector reforms in both 2024 and 2025. Service providers continued to invest in user-friendly digital interfaces, mobile applications, and responsive customer support systems to meet the expectations of a growing digital consumer base.

The Internet of Things (IoT) continues to transform customer experience by providing real-time package tracking and smart notifications. In 2025, IoTenabled devices within the courier industry offered improved shipment monitoring, allowing customers to track the exact location of their parcels and receive alerts on delivery status. This technology not only enhances transparency but also significantly boosts customer satisfaction.

Inaddition, regulatory oversight has been strengthened to ensure compliance with service standards, including delivery timelines, parcel security, and complaint resolution mechanisms. Public awareness initiatives are also being undertaken to educate consumers on their rights and available postal and courier services.

e) Adoption of Emerging Technologies and Innovation Pilots

Uganda is exploring the potential of emerging technologies such as drones and autonomous delivery solutions, particularly for hard-to-reach and underserved areas. While large-scale deployment remains at a pilot stage, these innovations present opportunities to significantly improve service reach, reduce delivery times, and lower operational costs. Collaboration with technology providers, development partners, and innovation hubs is being encouraged to test and scale context-appropriate solutions that address Uganda's unique logistical challenges.

f) Strengthening Institutional and Policy Frameworks

To support sustainable sector growth, Uganda continues to strengthen its regulatory and policy environment. This includes aligning national strategies with international frameworks guided by the Universal Postal Union (UPU), enhancing licensing and compliance mechanisms, and promoting fair competition among operators.

Capacity-building initiatives for sector stakeholders, as well as benchmarking against regional and global best practices, are being prioritised to ensure continuous improvement and resilience of the sector.

The post and courier sector in Uganda is undergoing a transformative shift, underpinned by innovation, policy reform, and growing market demand. By implementing these strategic interventions, Uganda is positioning itself to build a more efficient, inclusive, and sustainable logistics ecosystem that supports national development objectives and regional integration. Continued collaboration between government, regulators, designated operators, and private sector players will be critical in ensuring that the sector fully harnesses emerging opportunities and effectively responds to evolving challenges in 2025 and beyond.



24th April 2025 - UCC Hosts Inaugural Annual Postal and Courier Baraza

The stakeholder engagement event was held under the theme "Safe Hands, Secure Delivery – Use Licensed Operators," bringing together postal and courier operators, regulators, consumers, and partners to discuss industry developments, innovations, e-commerce support, and the critical need for licensing and regulation.

Annual Postal and Courier Baraza 2025











Multimedia and Content

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.

Film and Creatives

Film and Audio-Visual Landscape

Uganda's film and audiovisual industry demonstrated a strong growth in human capital and gradual structural maturation, anchored by a significantly expanded pool of industry professionals and increased government interventions. The sector recorded a substantial rise in the Commission and self-trained professionals, from 2,584 in 2024 to 7,358 in 2025 representing 184% growth.



The industry guilds also doubled from 4 to 8 reflecting improved organization, skills development, and professionalization. Content production registered moderate growth from 545 in 2024 to 605 in 2025, representing 11% increase, driven by national initiatives such as the Uganda Film Festival (UFF), Regional Film Competitions (RFCs), and the Content Development Support Programme (CDSP). Notably the Film Schools grew from 23 in 2024 to 27 in 2025.

Despite the industry facing continued structural constraints, there has been a slight growth in licensed operators such as Distributors, Exhibitors, Production houses and Exhibition premises from 32 in 2024 to 39 in 2025 indicating 21.8%. This highlights the need for deliberate investment in infrastructure, distribution, and exhibition platforms.

Overall, the 2025 industry landscape reflected a dynamic and expanding creative workforce that requires corresponding growth in policy interventions, production capacity, market access, and physical infrastructure to sustain inclusive and long-term sector development.

Content Development Support Programme (CDSP)

The Content Development Support Programme (CDSP) was established by the Commission to provide financial and technical support to Ugandan producers and production companies engaged in the development of film and audiovisual content. The Programme aims to stimulate local content creation, generate employment opportunities within the creative sector, and promote national values through the production of quality and relevant Ugandan content.

2023

159 Applications

4 Supported Projects

352 Cast & Crew

Support by category

Feature Films	2
TV Drama	1
Animation	1

2024

118 Applications

14 Supported Projects

924 Cast & Crew

Support by category

Feature Films	5
TV Drama	3
Animation	1
Short Films	3
Documentaries	2

2025

119 Applications

21 Supported Projects

Support by category

Feature Films	8
TV Drama	2
Animation	2
Short Films	3
Documentaries	6

Following the 3 years of execution, the Commission progressively scaled up support under the Programme through successive cohorts. These projects rose from 4 in 2023 to 14 in 2024 and are currently at 21 in 2025 representing a growth of 250% and 50% respectively.

The growth was enhanced by inclusion of diverse genres that included feature films, documentaries, short films, television dramas and animations. The programme also contributed to job creation within the audiovisual sector by engaging actors, scriptwriters, directors, cinematographers, and extras during project development and production stages. Through this structured intervention, the Commission continues to strengthen professional capacity, support livelihoods, and sustain the growth of Uganda's film/audiovisual industry.

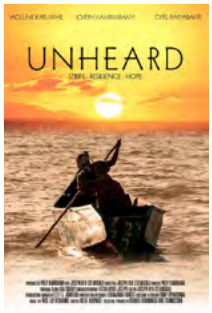


Performance of CDSP Projects

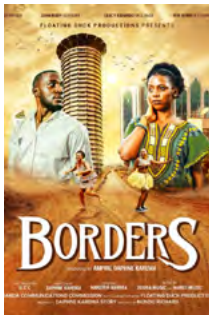
The projects supported under CDSP demonstrated strong performance in terms of critical recognition, nominations, awards and international exposure. Supported productions recorded multiple nominations and awards across different countries and festivals such as Zanzibar Film Festival in Tanzania, Durban International Film Festival in South Africa, Africa Magic Viewers' Choice Awards (AMVCA) in Nigeria, Kalasha TV and Film Festival in Kenya amongst others.
Several projects also achieved international screenings and distribution across broadcasting and digital platforms thereby enhancing visibility of Ugandan content beyond local markets.

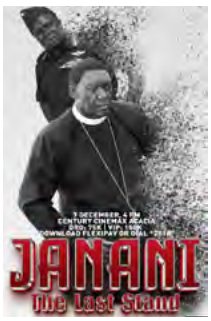
55 NOMINATIONS | 6 AWARDS

In total, the supported projects garnered 55 nominations, 6 awards and 12 international screenings with Unheard and Janani (both feature films) receiving the highest nominations 26 and 15 respectively.













FILM PROJECTS RECOGNITION AND SCREENINGS

Unheard (Feature Film)

26	3	4
Nominations	Awards	International Screenings

Karamoja (Feature Film)

2	2	4
Nominations	Awards	International Screenings

Borders (TV Drama series)

3	4
Nominations	International Screenings

Janani: The Last Stand (Feature Film)

15
Nominations

United to Save the Environment (Animation)

3
Nominations

Falling Out (Short film)

6	1
Nominations	Awards

"United to Save the Environment"- Animation: Nurturing Safe and Responsible Digital Citizens



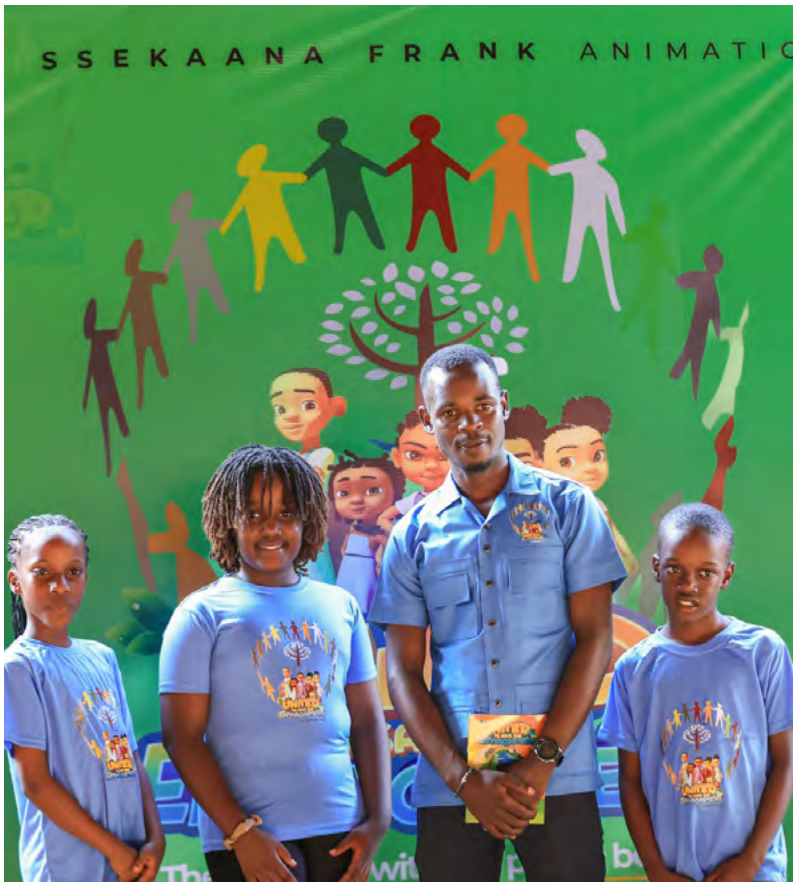
Child online protection is ultimately about creating environments, both physical and digital, where children can learn, grow and participate safely. The United to Save the Environment initiative, supported by the Uganda Communications Commission through the Content Development Support Programme, reflects this approach by using locally produced educational content to build children's knowledge, values and critical thinking skills.

Originally developed as a children's reader and later adapted into an animated series, the project follows Desire, a young girl who works with her friends and family to address environmental challenges in her community. Through engaging storytelling, the animation teaches responsibility, problem-solving, teamwork and positive citizenship in a format children can easily understand and enjoy.

Its relevance to child online protection lies in the wider objective of equipping children with the skills to make informed decisions and contribute positively to society. Just as children need guidance to protect the environment, they also need age-appropriate digital content that helps them navigate online spaces safely, responsibly and confidently. By creating meaningful, educational and culturally relevant content for young audiences, UCC is helping ensure that digital platforms are not only accessible to children, but also beneficial to their development and well-being.

The project also demonstrates the importance of giving children a voice on issues that affect their future. Through storytelling that encourages participation and active learning, United to Save the Environment supports the vision of a safer digital ecosystem where children are not merely consumers of content, but empowered learners and responsible citizens. In this way, the initiative reinforces the 2025 Annual Report theme by showing how quality local content can contribute to child safety, resilience and positive engagement in the digital age.





Originally developed as a children's reader and later adapted into an animated series, the project follows Desire, a young girl who works with her friends and family to address environmental challenges in her community. Through engaging storytelling, the animation teaches responsibility, problem-solving, teamwork and positive citizenship in a format children can easily understand and enjoy.



Uganda Film Festival

PERFORMANCE OF FILM SUBMISSIONS IN 2025

UFF is a flagship platform by the Commission for showcasing and promoting Ugandan audiovisual content and talent. Between 2021 and 2025, UFF has consistently demonstrated strong performance that has attracted a high volume of film submissions across a wide range of categories, including feature films, short films, documentaries, animations, television series, student films, East African, and International entries.

	2021	2022	2023	2024	2025
FEATURE	67	104	97	77	68
SHORT	49	71	62	106	138
DOCUMENTARY	13	16	31	35	49
ANIMATION	7	23	25	20	31
TV SERIES	27	21	23	18	21
STUDENT	25	22	27	18	20
EAST AFRICA	22	10	20	29	19
INTERNATIONAL	13	15	23	59	15
TOTAL	223	282	308	362	361

There has been consistent growth in film/audiovisual submissions from 223 in 2021 to 361 in 2025 reflecting an increment of 61.8%. Notably, the genres with significant growth were short films (181%), documentaries (276%), and animation submissions (342%), reflecting increased participation by emerging filmmakers and greater diversity in storytelling formats. This trend underscores the festival's role in nurturing new talent, encouraging innovation, and broadening creative expression within the local film industry.

Beyond film submissions, the UFF has made substantial contributions to industry development and stakeholder engagement. Over its 12 editions, the festival has brought together more than **150,000** industry players through screenings, training initiatives, exhibitions, and networking platforms.

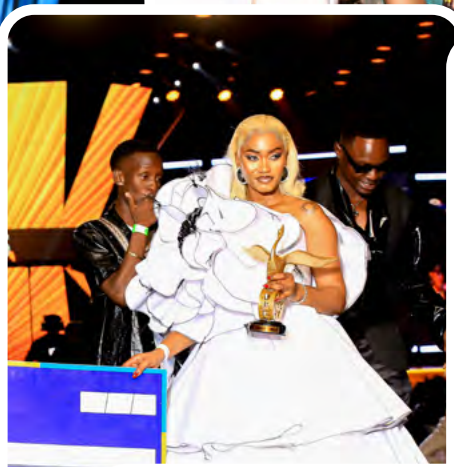
The initiative has strengthened collaboration across government, private sector, and industry stakeholders, while contributing to the growth of professionalism within the audiovisual sector.
On average, the festival attracts over 300 new titles annually, positioning it as a critical driver for content creation, visibility, market access, and audience development.

Uganda Film Festival (UFF) 2025

Beyond film submissions, the UFF has made substantial contributions to industry development and stakeholder engagement. Over its 12 editions, the festival has brought together more than **150,000 industry players** *through screenings, training initiatives, exhibitions, and networking platforms.*











REGIONAL FILM COMPETITIONS (RFC)

RFC IN 2025

The Regional Film Competitions (RFCs) was established in 2022 by the Commission to promote the local Film industry in Uganda, the initiative aims to increase diversity of Ugandan audiovisual content, improve skillset of upcoming film practitioners and build audiences for the Regional Film industry stakeholders.

Figure 36 Performance of RFC from 2022 – 2025

2022	
NORTHERN	10
EASTERN	8
CENTRAL	9
WESTERN	12
TOTAL	39

2023	
NORTHERN	50
EASTERN	13
CENTRAL	41
WESTERN	32
TOTAL	136

2024	
NORTHERN	41
EASTERN	14
CENTRAL	47
WESTERN	24
TOTAL	126

2025	
NORTHERN	54
EASTERN	64
CENTRAL	103
WESTERN	64
TOTAL	285

Over the four-year period from 2022 to 2025, the RFC registered strong and sustained growth in participation across all regions. Total film submissions increased significantly from 39 in 2022 to 285 in 2025, reflecting an increase of 630%. This demonstrates the effectiveness of RFC as a decentralized platform for promoting filmmaking, nurturing regional talent, and expanding access to audiovisual production opportunities.

In 2025, all regions recorded their highest participation levels since the inception of the competitions. The Central Region emerged as the leading contributor with one hundred and three (103) submissions, while both the Eastern and Western Regions registered sixty-four (64) submissions each, indicating improved regional balance and expanded creative activity outside traditional production hubs. The Northern Region also recorded steady growth, registering fifty-four (54) submissions in 2025.

Overall, the performance of the Regional Film Competitions over the four years highlights their critical role in strengthening grassroots participation, promoting regional storytelling, and feeding content into national platforms such as the Uganda Film Festival. The sustained upward trends affirm the RFCs as a key intervention for inclusive industry development, talent discovery, and the long-term growth of Uganda's film and audiovisual sector.

Regional Film Competitions (RFC) 2025

In 2025, all regions recorded their highest participation levels since the inception of the competitions. ***The Central Region emerged as the leading contributor with 103 submissions****, while both the Eastern and Western Regions registered sixty-four (64) submissions each.*



Local Films on the International Scene

Uganda's film industry recorded progressively stronger performance at the international level between 2022 and 2025, as evidenced by growth in both nominations and awards won at international film festivals and platforms. International nominations increased from 40 in 2022 to 92 in 2025, representing an increase of 130% over the four-year period hence signaling improved global visibility and recognition of Ugandan audiovisual content.

Awards won at the international level also demonstrated overall positive performance, rising from 22 awards in 2022 to 29 awards in 2025 representing a moderate increase of 31.8%, despite a temporary decline recorded in 2024. The strong rebound in 2025 reflects improvements in production quality, storytelling depth, and technical standards, as well as increased preparedness of Ugandan productions for international markets.



2022	
NOMINATIONS	40
AWARDS WON	22

2023	
NOMINATIONS	63
AWARDS WON	24

2024	
NOMINATIONS	55
AWARDS WON	12

2025	
NOMINATIONS	92
AWARDS WON	29



Audience Building Program for Local Content

To increase awareness, appreciation, and consumption of local content across different platforms, the Commission established the Audience Building Program to showcase and promote local content. Through this program, several local films have been accorded an opportunity to be screened in Cinemas, Schools, and Community centers which has attracted a lot of audiences to watch Ugandan local stories.

The program indicated an overall improvement in local content reach and financial performance in 2025 compared to 2024. Total attendance rose significantly from 2,241 to 7,201 representing a 221% increase which is attributed to a much broader audience engagement. This growth was driven largely to the schools and community screenings where attendance increased sharply from 800 to 4,410, a 451% rise, highlighting the success of the program beyond traditional cinemas.

The Cinema attendance also recorded growth from 1,441 to 2,791 equivalent to 94% increase, indicating sustained public interest in festival screenings for local films at cinemas. Despite this strong growth I attendance, the number of films screened declined slightly from 47 in 2024 to 41 in 2025, a 13% reduction. This indicates that the local screenings achieved higher audience concentration turnout per screening, rather than relying on a higher volume of screenings.

The Revenue generated increased from UGX. 21.6 million in 2024 to UGX. 40.1 million in 2025, reflecting an increase of 86%. The growth in revenue, alongside the substantial increase in attendance, demonstrates improved commercial performance and stronger public uptake of festival activities and viewership for local films.

2024

TOTAL ATTENDANCE	2241
CINEMA ATTENDANCE	1441
SCHOOLS & COMMUNITY	800
MOVIES SCREENED	47
REVENUE	21,615,000

2024

TOTAL ATTENDANCE	7201
CINEMA ATTENDANCE	2791
SCHOOLS & COMMUNITY	4410
MOVIES SCREENED	41
REVENUE	40,125,000

Capacity Building Programme for Audio-Visual Industry

The Audio-Visual (AV) industry is driven by content creation, distribution and exhibition as well as Government support through various initiatives to strengthen the industry such as CDSP, UFF and RFC. However, the industry still faces limited technical capacity, knowledge of distribution, exhibition and standardization of industry stakeholders' workforce. The Capacity Building Programme aims to empower industry stakeholders through targeted training for skills enhancement, improving professionalization and enabling business sustainability.

The Capacity building initiatives in the film industry recorded steady growth in 2025 with continued investment in skills development and industry empowerment by the Commission. The total attendance in training programmes increased from 2,463 in 2024 to **2,690** in 2025, representing **19% increase**. This growth demonstrates expanding reach of capacity building interventions and the Commission's commitment to strengthening technical skills, knowledge and professional readiness for the creative industry.

	2024	2025
REGIONAL FILM COMPETITION TRAININGS	150	145
UFF CAPACITY BUILDING WORKSHOPS & MASTERCLASSES	1,425	691
CINEARTS DIGITAL SKILLING	500	461
UCC/MULTICHOICE	388	0
SAUTI MEDIA PLUS (OMARI)	0	145
CDSP SUBMISSION CRITERIA	0	40
PAN AFRICAN ACTORS MASTER CLASS	0	140
SENSITISATION ON RFC/UFF/CDSP	0	838
LICENSING SENSITISATION	0	80
SPECIAL ENGAGEMENT (GBENGA AKINNAGBE)	0	150
TOTAL	2,463	2,690



Regional Film Workshops

As part of the Northern Regional Film Competition 2025, UCC held film screenings at Franka's Heart at Gracious Secondary School to engage communities, spark conversations, and inspire the next generation of storytellers.

Broadcasting Services

Uganda's broadcasting sector continues to evolve, with television and radio remaining central to information dissemination and entertainment across the country. As of December 2025, the Commission had issued 55 television licenses across seven distinct license categories. These include Regional Free to Air (RFTA), Hybrid, Online Broadcaster, Public Infrastructure Provider (PIP), Public Service Provider (PSP), Landing Rights, and Subscriber Management Service. It should be noted that some operators hold multiple licenses to accommodate broader operational requirements. With respect to radio, the Commission has issued a total of **121 licences** in different licence categories. These categories include Commercial, Community and Online Data Providers. 3.1 FM Radio.

A total of 121 licences were issued by December 2025, comprising 114 FM and 7 online radio licences, while the remaining 169 operators are still under licence renewal process. With continued improvements in Uganda's internet infrastructure, the number of online data providers is expected to rise as broadcasters seek to extend their reach and diversify platforms. In addition to uptake of online services, the Commission has identified an opportunity in implementing Digital Audio Broadcasting (DAB) and is in the process of rolling it out.

National consultations with key stakeholders have been concluded and a draft licensing framework for Audio Broadcasting infrastructure is already in place. DAB is envisaged to offer numerous benefits to consumers, broadcasters and the government.

To the consumers, DAB will ensure better -quality service that is better sound, better-quality coverage and ability to search for a radio station by name. In respect to the broadcasters, they are guaranteed greater spectrum availability at a reduced cost per channel and longterm cost savings after switch-over from analogue to DAB. To the government, DAB will reallocate wider spectrum that will translate into additional revenues.

Television

License category	2024	2025
REGIONAL FREE TO AIR (RFT)	30	22
HYBRID	28	20
ONLINE BROADCASTER	2	3
PUBLIC INFRASTRUCTURE PROVIDER	4	4
PUBLIC SERVICE PROVIDER	6	3
LANDING RIGHTS	1	1
SUBSCRIBER MANAGEMNET SERVICE	1	1

RFTA licenses were the most prevalent, with 22 stations operating under this category by the end of 2025. These licenses were relatively affordable and largely depend on the public signal distribution network operated by the National Broadcaster Uganda Broadcasting Corporation (UBC) under Signal Network (SIGNET). Nonetheless, there was a decline in the total number of Free to Air licenses compared to the previous year that is from 30 in 2024 to 22 in 2025 representing a decline by 36.3%. This indicates reduced content variety for lower-income households that rely heavily on FTA services.

This decline was occasioned by the migration of some FTA operators from FTA to hybrid to expand their coverage. Secondly other FTA channels were unable to afford operational costs such as channel carriage fees. These have been switched off from different channel carriage platforms.

The limited number of online broadcaster licensees (3) highlights the slow adoption of internet-based television services among local broadcasters, despite the growing centrality of online platforms for content access. This gap may erode the competitiveness and appeal of local television content, particularly among younger and urban audiences.



Protecting Children in the Digital Age

Despite the slow but steady adoption of internet-based television, there is a huge proliferation of online platforms that offer different types of content. This content affects all age groups but most specifically children. Online platforms and applications offer content targeting children but without taking into consideration children's interests. This has affected the children who access this content online and thereby needing special protection from the existing harmful content. Several activities have been initiated to ensure that children online are protected including public awareness of the harms of such content, extending obligation to internet service providers to protect children online and stepping enforcement against online platforms that carry content that is not suitable for children.

Pay TV

Market Movements in 2025

Canal+ Acquisition of MultiChoice Group

One of the most significant transactions in 2025 was the proposed acquisition of MultiChoice Group Limited by Canal+, the parent company of MultiChoice Uganda and GOtv Uganda, both licensed operators in Uganda's pay television market. Because the transaction resulted in an indirect transfer of control of broadcasting licences held in Uganda, it was subject to regulatory review and approval by the Commission, the Common Market for Eastern and Southern Africa (COMESA), and the relevant South African regulatory authorities.

During the regulatory review process, authorities assessed potential competition concerns, particularly those relating to market concentration and control of premium content rights. Subject to the imposed conditions, the transaction is expected to reshape the competitive landscape of Uganda's pay television and audiovisual market while also having broader implications for the sector across the region.

Following the review, the transaction was approved subject to conditions designed to safeguard competition, promote local content development, protect employment, and ensure continued compliance with applicable regulatory requirements.

The acquisition represents a major development in Uganda's audiovisual and pay television sector. Canal+ is one of the world's leading media and entertainment groups, with operations running across more than 70 countries across Africa, Europe, and Asia, and a combined global subscriber base of over 40 million. The company has experience across the audiovisual value chain, including content production, pay television, sports broadcasting, streaming services, content distribution, and digital entertainment platforms.



	2022	2023	2024	2025
TOTAL SUBSCRIBERS	3,054,351	3,520,771	2,481,349	2,591,846
ACTIVE SUBSCRIBERS	1,586,311	1,554,458	1,000,000	1,002,165
DECORDER ACTIVITY RATIO	52%	44%	40%	38.7%

Uganda's Pay TV sector experienced a very slight increase in general subscription, with total subscribers increasing from 2,481,349 in 2024 to **2,591,846** in 2025 representing an increase of 4.5%. Number of active subscribers increased from 1,000,000 in 2024 to **1,002,165** in 2025 representing an increase of 0.21%.

This lack of significant increase is primarily linked to the continuous growth of video streaming services such as TikTok, Instagram, Netflix YouTube, Kibanda Express, Internet Protocol Television (IPTV) amongst others which have become a popular alternative for consumers. The convenience, affordability, and variety offered by these platforms have made them attractive, especially as more Ugandans gain more access to the internet.



Between the seven Pay TV service providers, StarTimes offers the most channels with a total of 171 whereas Zuku offered the least channels with a total of 86. Pay TVs do not offer much of a variety of programming and most of them are not as current as what other Video-On-Demand (VoD) platforms offer. Nowadays, consumers prefer to have the ability to decide what they watch and when they watch it. This is slowly making the traditional linear programming obsolete.

Consumer Protection

Consumer protection remains a central pillar of the communications sector, ensuring that citizens can safely, confidently, and equitably access digital and multimedia services amid rapid technological advancement and evolving risks.

Illegitimate Communications Devices

In fulfilment of its statutory mandate and aligned with international best practice, the Commission launched the SIMU KLEAR initiative to eliminate counterfeit, cloned, and nontype-approved communication devices from the Ugandan market. Powered by the Central Equipment Identity Register (CEIR), the platform integrates Mobile Network Operators' Equipment Identity Registers to detect and block illegitimate devices from accessing communication networks.

In line with this initiative, the Commission continued to promote awareness about the dangers of counterfeit devices through the SIMU Klear campaign. This campaign focused on empowering consumers with knowledge about the risks associated with fake devices including threats to consumer's finances, security and safety while also guided them on how to verify the phone's legitimacy before purchase. The campaign reached over 20 million consumers including traders, women, youth, persons with disabilities and island communities among others.

The campaign highlighted key challenges faced by consumers, including limited access to service centers, mobile money fraud targeting blind users, the need for sign language support, and the high cost of genuine mobile phones. The Commission committed to working with relevant partners to address these concerns and enhance consumer protection for all Ugandans.









On 8th October 2025, the Uganda Communications Commission officially launched the #SIMUKlear system at UCC House in Bugolobi. This groundbreaking initiative, powered by the Central Equipment Identity Register (CEIR), integrates with Mobile Network Operators to verify genuine devices, block counterfeit and cloned phones, deter device theft, and curb fraud.

Empowering Consumers in the Digital Age

On the 15th March 2025, Uganda joined the rest of the world to mark Consumer Rights Day with consumer-focused activities in Luweero District which included interactive forums with students, consumer help camps, road shows, and a town-hall meeting where local leaders and citizens raised real concerns directly to service providers. The Commission leveraged the platform to emphasize the critical role of consumer rights in the digital age, highlighting rights, responsibilities, and innovation. As part of its CSR initiatives, the Commission also unveiled a newly renovated community hall for public use.







Strengthening Consumer Protection Through Digital Safety Engagements

In partnership with the Anti-Fraud Consortium, the Commission amplified consumer voices through community roadshows and edutainment activities aimed at equipping Ugandans with practical digital safety skills.

The Commission also leveraged the Communications Consumer Parliament (CCP), a platform that brings together consumers, service providers, and regulators, to advance consumer awareness. The 15th Communications Consumer Parliament, hosted in Soroti City, featured digital safety awareness sessions for youth, roadshows targeting traders, and engagements with university students, all designed to empower consumers to recognize and avoid online fraud.

The Commission remains committed to protecting consumers and promoting a digitally inclusive Uganda for all.





Fighting Digital Fraud

The Commission in partnership with the Bank of Uganda, conducted radio talk shows across the Western and Northern regions to strengthen consumer protection against digital fraud.

The engagements provided guidance on reversing erroneous transactions, resolving SIM registration challenges, and claiming funds belonging to deceased relatives, helping consumers use digital payment platforms safely and avoid fraudsters.

The Commission continues to expand these awareness campaigns nationwide to ensure consumers are equipped with the knowledge and skills needed to prevent digital fraud.



The talk shows were follow-ups to resolutions made at the Second Digital Financial Services (DFS) Workshop, themed "Fraud in Digital Financial Services", held on 27 June 2025 at the Lake Victoria Serena Hotel, Kigo. UCC reaffirmed its commitment to fostering a secure and resilient digital ecosystem in collaboration with the Bank of Uganda.



Advancing Digital Safety for Children & Youth

The Commission launched the Debate Series as a consumer protection initiative to engage young people on digital safety under the theme, "A Safer Digital Future." The programme reached over 17,800 students through debates and more than 127,000 students through awareness sessions conducted in 100 schools. Combined with social and mass media campaigns, the initiative reached an audience of over 3.5 million people.

The engagements demonstrated strong awareness among students on digital literacy and online safety, while also highlighting concerns about the effects of cyberbullying and hate speech on mental health. To sustain youth engagement, the Commission also introduced a Digital Ambassadors Programme to promote peer-to-peer digital safety advocacy.

Through these initiatives, the Commission continues to strengthen consumer protection by promoting safer online experiences and enhancing youth-focused digital safety measures









Addressing Consumer Concerns Regarding Data Depletion Concerns

In response to public concerns over rapid data depletion, the Commission conducted Regional Consumer Dialogues between August and September 2025 in Rukungiri, Nebbi, Masindi, and Busia, building on earlier engagements held in Kiboga, Tororo, Kotido, and Kitgum.

Held under the theme "Digital Safety, Your Priority," the dialogues provided an interactive platform for consumers, service providers, and the regulator to discuss key sector issues and strengthen consumer awareness and protection. Through town hall meetings, radio talk shows, and social media campaigns, the initiative reached over 10 million consumers nationwide.



Advancing Financial Digital Literacy

The Commission in partnership with the Bank of Uganda, conducted a joint consumer awareness and education campaign during the Uganda Manufacturers Association (UMA) Trade Fair in October 2025. The initiative earned the two institutions the Best Exhibitor Award in the Regulators Category in recognition of their efforts to advance financial digital literacy and consumer protection.

Through direct engagements and digital outreach on platforms such as X and TikTok, consumers were educated on secure digital transactions, responsible use of digital payment platforms, and their rights within the digital economy.

The recognition underscores the impact of partnership-driven consumer awareness initiatives and reaffirms the commitment of the Commission and the Bank of Uganda to strengthening consumer protection in the digital financial ecosystem.



Consumer Complaints Management

Under its consumer protection mandate, the Commission receives, investigates, and facilitates the resolution of consumer complaints. Consumers are encouraged to first seek redress directly from their service providers and only escalate unresolved or unsatisfactorily addressed cases to the Commission.

Complaints may be submitted through multiple channels, including the toll-free call centre (0800 222777), social media platforms such as X, TikTok, and WhatsApp, as well as dedicated email. Consumers may also visit the Commission's regional offices in Mbarara, Mbale, Masindi, and Gulu, or the UCC Headquarters in Kampala for in-person assistance.

Operator	Total
PHONE CALLS	1,551,864
WALKIN	24,284
SOCIAL MEDIA	7,369
EMAIL	6,005

TOTAL COMPLAINTS
1,589,522

RESOLUTION RATE
99%

In 2025, the communications sector registered over 1.58 million complaints, achieving a resolution rate of 99% within 24hours after receipt of a complaint.

Phone calls remained the primary channel of contact, representing 97.6% of all customer interactions, reflecting sustained trust in direct engagement. These outcomes underscore a continued commitment to customer satisfaction and highperformance service delivery.

	2023	2024	2025
NO. OF COMPLAINTS	830,477	933,804	1,589,522
SUBSCRIBER BASE (MILLIONS)	37	41.8	47.5
COMPLAINTS TO SUBSCRIBER RATIO	2.2% (0.022)	2.2% (0.022)	3.3% (0.033)
RESOLUTION RATE	90.2%	96.2%	99%

Over a three-year period, the telecom subscriber base expanded by 28 percent, reflecting sustained market confidence. Concurrently, complaints resolution rates improved from 90% in 2023 to 99% in 2025, indicating faster and more effective response to customer issues.

Complaint volumes increased in 2025, partly due to growth and heightened customer engagement. Investments in systems, infrastructure, and digital channels are underway to further enhance customer experience, strengthen service quality and reduce complaint rates.

Total complaints surged 83% year-on-year, from 758 in 2024 to 1,388 in 2025, this growth was driven overwhelmingly by digital channels indicating a strong shift towards self-service interaction.

Resolution rate improved from 96% to 98%, demonstrating enhanced operational efficiency despite higher volume.



11th March 2025 - Telecommunications CEO-Consumer Forum 2025

The Commission organised the inaugural Telecommunications CEO and Consumer Forum at Mestil Hotel in Kampala. The event brought together telecommunications CEOs, regulators, officials from the Ministry of ICT and National Guidance, consumer advocacy groups, the media and members of the public for an open discussion on quality of service, network coverage, pricing, customer care, data privacy and digital inclusion.



REGULATORY STEWARDSHIP

In 2025, the Uganda Communications Commission (UCC) intensified its regulatory stewardship efforts to promote a more competitive, efficient, and consumer-responsive telecommunications sector.

Telecommunications Market Definition Assessment

A major milestone during the year was the completion of the national Market Definition and Market Power Assessment.

The exercise involved an extensive review of both retail and wholesale communications markets, including mobile services, fixed networks, tower infrastructure, and related wholesale services.

It identified and defined relevant markets, assessed levels of market concentration, and evaluated the existence of Significant Market Power (SMP) across the sector. The assessment drew on market performance data, pricing trends, and stakeholder consultations through industry interviews, which provided practical insights into challenges relating to tower access, wholesale services, spectrum obligations, and licensing costs.

The study findings highlighted a number of competition concerns within the sector including operators holding Significant Market Power in retail mobile services as well as in key wholesale markets, including



1. Dominance in the tower infrastructure market, with concerns raised regarding exclusivity arrangements and limited bargaining power for operators.
2. Call termination markets continue to exhibit monopoly characteristics within individual networks.
3. Establishment of market segments, such as bulk SMS services and parts of the fixed communications market that remain sufficiently competitive

The study recommended evidence-based regulatory measures. These include conducting cost studies in priority wholesale markets such as tower infrastructure, call termination services, roaming and MVNO access.

Overall, the assessment reflects the Commission's evolving and evidence-driven regulatory approach that prioritizes stakeholder engagement, focuses regulatory attention on the most critical market challenges, and seeks to create an enabling environment for innovation, investment, and improved communications services for all Ugandans

The Telecom Infrastructure and Service Costing Assessment

The Commission concluded a telecommunication costing study covering three interrelated streams: infrastructure costing, network costing and retail services costing as a recommendation from the telecommunications market definition and market power assessment study.

It assessed the key drivers of cost and the structure of the market for mobile, fixed and passive infrastructure services. The cost models from the study inform regulatory decision-making and support interventions aimed at improving efficiency, competitiveness, and affordability. Key findings of the study include;



Together, these costing study outputs signal the Commission's commitment to maintaining a predictable, cost-reflective and competitively sustainable regulatory environment so that consumers receive more affordable services.

Numbering Resource Management

In 2025, the Commission continued to strengthen numbering administration in response to its growing demand. This included opening the 300 to 398 USSD short code range, creating additional space for digital services such as mobile banking, e-commerce, and e-government solutions.

New mobile numbering blocks were also assigned to mobile network operators to support subscriber growth and service expansion the assigned blocks in 2025 included:

Mobile numbers

airtel	070,074, 075 0730, 0731
BLUECRANE COMMUNICATIONS	07360, 07361
UTel	071
SAVANNA FIBER LIMITED	0721
HAMILTON TELECOM	0724
tangerine Broadband	0726, 0727
talkio MOBILE	07280
ROKE	07340
MTN	076, 077, 078 0790, 0791, 0792, 0793, 0794

> Uganda Communications Commission continued to strengthen numbering administration by opening the 300 to 398 USSD short code range, creating additional space for digital services such as mobile banking, e-commerce, and e-government solutions.

Fixed Numbers

MTN
03

UTCL
04

AIRTEL
0200, 0201, 0207

INFOCOM LIMITED /LIQUID
0202 40

BLUE CRANE COMMUNICATIONS LIMITED
0202490, 0202491, 0202492, 0202493, 0202494

TALKIO MOBILE LTD
020310, 020311, 020312, 020313, 020314

IWAY AFRICA (U) LIMITED
02032000

ROKE INVESTMENT INTERNATIONAL LIMITED
02050, 02051, 02052, 02053, 02054

HAMILTON TELECOM
02061

SIMBANET
0206300, 0206301, 0206302, 0206303, 0206304

A National Destination Code (NDC) is the group of digits that appears immediately after the country code (+256) or national dialing prefix (0) and identifies the telecommunications operator associated with that number.

Common User Short Codes

***100#**
Customer Service



***112#**
Emergency, Police & SOS



***110#**
Maritime Communication for Safety on Lake Victoria



***196#**
Do-Not-Disturb /Opt-out



***131#**
Check balance



***116#**
Child Helpline



***130#** Recharge ***#**

***197#**
Verification of SIM Card Registration Status



***999#**
Emergency, Police & SOS



Environmental Sustainability in the Communications Sector

Environmental sustainability in the sector is correlated with responsible consumption, resource efficiency, and good infrastructure lifecycle management. During the year, the Commission advanced environmental sustainability initiatives under two broad themes.

The first focused on increasing public confidence in the safety of communications infrastructure, devices, and services. The second focused on strengthening sector sustainability through improved environmental governance, evidence generation, international engagement, and practical interventions.

The initiatives undertaken under both themes have helped strengthen public confidence in the safety of communications infrastructure while also laying the groundwork for stronger sector sustainability oversight, improved waste management practices, deeper alignment with regional and global sustainability processes, and future scale up environmentally responsible approaches across the communications sector.

Increasing Public Confidence in the Safety of Communications Infrastructure, Devices, and Services

To reduce community and stakeholder resistance that continues to slow network rollout, affect service quality, and constrain the expansion of communications services, the Commission pursued a coordinated initiative combining technical guidance with targeted stakeholder engagement. As a central milestone, the Commission developed and disseminated the Guidelines for the Assessment of RF EMF Exposure from Communications Infrastructure and Services, consolidating its assessment practice into a structured national reference framework that promotes consistent assessment methodologies, clarifies stakeholder roles and implementation requirements, and strengthens evidence-based regulatory oversight of infrastructure safety.

This was complemented by awareness and sensitization engagements with prospective host communities and other sector actors, designed to improve public understanding of infrastructure safety and correct common misconceptions. Together, these measures strengthened public trust and fostered a more informed, evidence-based approach to infrastructure deployment, easing resistance, and creating a more enabling environment for continued network expansion.



13th Aug - 14th Oct 2025: E-Waste Management Pilot Launched

UCC, together with the Ministry of ICT&NG and KCCA, launched a six-month e-waste project in Kampala, Mukono, and Wakiso. UCC ED Hon. Nyombi Thembo cited Uganda's low e-waste recycling rate and emphasized the need for responsible disposal and circular economy practices.



Increasing Sector Sustainability

To strengthen environmental sustainability across the communications sector through improved compliance oversight, evidence-based action, practical interventions, and alignment with regional and global sustainability agendas, the Commission undertook the following initiatives.

i) Conducted a study evaluating the carbon and energy footprint of the telecommunications sector.

ii) Contributed to the global agenda on green digital transformation, e-waste, climate action, and circular economy. Notably, Uganda chairs the ITU-T SG5 Regional Group for Africa—a role that has raised Africa's visibility in global standards discussions, encouraged stronger African participation, positioned Uganda as a regional voice on ICT environmental sustainability.

iii) Implemented an ICT e-waste collection pilot across Kampala, Wakiso, and Mukono to test scalable models for collecting and managing e-waste while generating evidence for future scale-up. The pilot tested multiple collection models—fixed points, community-based approaches, and engagement with repairers and wastepreneurs— while promoting digital traceability of e-waste flows.

Quality of Service Monitoring

Quality of Service (QoS) Monitoring remains a critical process for assessing whether consumers receive communication services that are not only available but also usable and dependable, by monitoring QoS in environments that reflect common consumer challenges.

In 2025, UCC conducted targeted QoS monitoring across three demanding environments: indoor urban commercial buildings in Kampala's CBD (including basements), eight border towns (Kyotera, Ntoroko, Zombo, Koboko, Lamwo, Amuru, Busia, and Bukwo), and the CAF CHAN 2025 tournament at Namboole Stadium under high-demand conditions.

The QoS results indicated that;

- i) Performance varied significantly by the environment and operator. In indoor urban buildings, service quality remained a challenge, with interference—often from consumers using their own signal boosters—affecting Airtel, MTN, and Lycamobile, while UTeL showed significant indoor coverage limitations. Longer call setup times were observed across operators, highlighting the need for better in-building solutions and stronger coordination with property owners.

- ii) In border regions, no operator achieved consistent compliance across all areas. MTN and Airtel performed relatively better in some towns, while Lycamobile and UTeL showed notable gaps. Data speeds were sometimes acceptable, but reliability remained weak, with low session success rates, high latency, and packet loss. Involuntary roaming continued to affect service quality in these areas.

- iii) At Namboole during CAF CHAN 2025, MTN demonstrated strong resilience under high traffic, Airtel experienced congestion affecting voice and data, and Lycamobile and UTeL performed poorly due to the absence of dedicated venue infrastructure.

Overall, the findings confirmed that a fast service is not always a good one—reliability matters as much as speed—and that QoS performance must be measured in the real environments where consumers live, work, and move.

The Commission is using these findings to strengthen monitoring and enforcement of QoS obligations, promote in-building solutions, improve spectrum coordination during major events and in border areas, and engage operators on targeted optimisation. It is also exploring crowdsourced Quality of Experience (QoE) data for real-time, location-specific insights and integrating consumer complaints more deliberately into assessments—while addressing wider factors affecting service quality, including infrastructure damage from construction, vandalism and theft, counterfeit devices, unauthorized boosters, and unreliable power supply.

Universal Service Access Fund Management Initiatives



Infrastructure and Connectivity

Implementation of infrastructure interventions progressed steadily during the year, anchored by the continued rollout of subsidized tower sites under the TowerCo of Africa Uganda Limited partnership. By the end of December 2025, 53 out of 64 targeted sites were successfully commissioned and on air with MTN Uganda, significantly extending broadband coverage to previously unserved sub-counties.

In the realm of community access, 60 Public Access Centres (PACs) were fully established and equipped with ten-seater ICT facilities. These centers, installed across both regional districts and the Greater Kampala Metropolitan Area, provide vital shared digital access points for surrounding communities. Internet connectivity was sustained for over 225 secondary schools and was newly activated for 30 PACs under a one-year post-installation service agreement.

These interventions strengthened last-mile connectivity and expanded access to internetenabled services, particularly in rural and commercially unviable areas.

Device Access and Digital Enablement

Efforts to improve access to digital devices were significantly advanced through a major distribution initiative in partnership with the Ministry of Finance, Planning and Economic Development (MoFPED). A total of 4,112 tablets were distributed across 72 districts to support the operations of Parish Development Model (PDM) Savings and Credit Cooperative Organisations (SACCOs). Beneficiaries were supported with six-month data bundles (3GB monthly non-expiry), with monitoring data indicating that over 80 percent of users actively utilize the data bundles and independently sustain connectivity post-subsidy.

Additionally, assistive technology devices were deployed in four regional centers (Mbale, Masaka, Oyam, and Kasese) to support digital access for persons with disabilities.

These interventions enhanced access to digital tools and supported active participation in digital platforms at both individual and community levels.

Education and Institutional ICT Integration

Significant progress was recorded in strengthening ICT integration within the education sector. A total of 60 secondary school ICT laboratories were fully installed and operational by the close of the year, providing learners across the country with access to either grid-powered or solar-powered computing facilities.

E-learning initiatives were concluded in 32 primary schools under the DECEDA pilot project implemented with Nkumba University, while internet connectivity continued to support teaching, research, and collaboration in over 225 secondary schools. Institutional capacity was further enhanced through the operationalization of ICT facilities, including the Jinja Civil Service College laboratory (40 computers) and the equipping of 58 faith-based health facilities with computers and enterprise Wi-Fi to digitize patient records and enable telemedicine.

Digital Skilling and Capacity Development

Digital skilling programmes were implemented across multiple target demographics. During the period, 1,118 boda boda riders were trained in digital and financial literacy under the "Beera Ku Digital" initiative in Mukono and Wakiso districts. Concurrently, 1,008 youth completed digital empowerment training across nine districts in the Eastern, Western, and North-Eastern regions, exceeding the planned target of 900 participants and achieving 36.1 percent female participation against a 30 percent target.



In the education sector, 750 teachers were retooled in ICT integration at anchor schools in Moroto, Fort Portal, and Mbarara, while 1,190 headteachers were sensitized across six regional workshops conducted in partnership with RENU and Cyber Schools Technology Solutions.

Digital Services and Innovation

Support to digital innovation was advanced through the operationalization of the E-Booster programme (Cohort 2). Six winning digital solutions spanning tourism, health, mobility, and energy sectors were launched and are currently under incubation with assigned grant managers.

In the creative sector, over 1,000 performing artists and creatives were trained in digital content distribution and commercialization in partnership with Ugatunes.



The training culminated in workshops across Gulu, Jinja, Masaka, Mbarara, and Kampala, supporting the onboarding of local talent onto a locally developed online distribution platform.

These efforts contributed to promoting innovation and expanding economic opportunities within the digital ecosystem.

Financial Inclusion and Digital Transactions

Mobile-enabled financial services continued to expand, supported by the integration of ICT tools within the Parish Development Model framework. The distribution of tablets to PDM SACCO executives has enhanced the efficiency of credit operations within the PDM Information System (PDMIS). Increased adoption and sustained usage of mobile money and data services among beneficiaries reflect growing reliance on mobile platforms for financial and administrative interactions.

These developments contributed to enhancing financial inclusion and supporting participation in both domestic and regional economic activities.

Inclusion and Targeted Interventions

Targeted interventions were implemented to support inclusive access to ICTs for marginalized groups. During the period, 1,010 persons with disabilities received digital skilling and employability training across 28 districts, while the National PWD Digital Observatory was upgraded with enhanced accessibility features and an AI-powered chatbot. The observatory now hosts profiles for over 110,000 individuals, enabling better targeting and policy planning.

Assistive technologies were deployed in four regional centers, improving access to digital services for persons with disabilities. These efforts contributed to reducing access barriers and promoting equitable participation in the digital ecosystem.





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