

# Uganda Telecommunications Report Q3 2016

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## Abstracts

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**BMI View:** We retain a positive outlook of the Ugandan mobile market over the course of our forecast period out to 2020. Low mobile penetration rates and rising subscriber concentration in the urban areas drive our mobile growth forecast. However, intense competition with nine operators active in the market and low incomes ensure that ARPU levels will remain depressed for the foreseeable future. Uganda's plan to implement infrastructure sharing regulations will have a limited impact on the telecoms market, as tower sharing is already common among mobile operators and the country has very limited wireline networks. Nevertheless, we are hopeful that organic subscriber numbers will see some growth in the next five years. Looking forward, the 3G and 4G segment is poised to grow but from a very low baseline.

### Latest Updates & Industry Developments

The mobile market grew to 20.7mn in 2015 for a penetration rate of 53%.

The number of mobile money accounts in Uganda increased to 19.8mn in September 2015. The accounts were up 2.1mn from 17.9mn in September 2014.

The number of mobile money registered users in the country is rising, while bank accounts have remained relatively stable at 5mn, according to Bank of Uganda Deputy Governor Louis Kasekende.

The mandatory mobile registration brought into effect towards the end of 2015 has resulted in a significant decline in the number of connections in H215. MTN lost over 2.5mn connections in Q415 alone. However, signs of recovery are

evident as the operator posted a growth of 695,000 new subscribers in Q116.

MTN recently took a loan of USD114mn from a consortium of international banks to invest in a network infrastructure in the country over the coming years. The company claims to be committed towards rolling out data services that spread across the varied geography of the nation.

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