

Uganda Telecommunications Report Q4 2016

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Abstracts

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BMI View: Operators continue to make investments in advanced data networks. However, MFS is likely to remain the primary VAS in the mobile market as traction in the take-up of advanced mobile data services remains slow. Notwithstanding, low mobile penetration, which we forecast at 57% in 2016 and inactive Sims in the market are both indicative of organic subscriber growth opportunities in underserved high Capex/low margin regions. Should operators pursue this, the mobile market may see positive net subscriber addition. We believe enterprise subscriptions will continue to drive moderate growth in the fixed voice market. Low spending power and limited access to devices will, however, continue to keep broadband penetration low and the pay TV market will experience growth constraints in 2016 deriving from single digit inflation in the market.

Latest Updates & Industry Developments

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

The number of mobile money accounts in Uganda increased to 18.93mn in March 2016. The accounts were down 56,000 from 18.99mn in March 2015.

The mandatory mobile registration brought into effect towards end-2015 resulted in a significant decline in the number of connections in H215. MTN lost over 2.5mn connections in Q415 alone. However, signs of a recovery are evident as the operator posted growth of 695,000 subscribers in Q116.

MTN took a loan of USD114mn from a consortium of international banks to invest in a network infrastructure in the country. The company claims to be

committed to` rolling out data services that spread across the varied geography of the nation.

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