
Status of the Communications Market September 2007



The Sector at a glance – Sept 2007

	June - 07	Sept - 07
PIP + PSP Licensees	4	9
PSP - Voice and Data Only Licensees	10	7
PSP - Capacity Resale Licensees	4	5
Fixed Lines	154,383	162,263
Mobile cellular subscribers	3,575,263	4,195,278
Tele density	13.3	15.5
Payphones	21,475	24,030

Licensed Telecom Operators .

PIP + PSP Licensees	<ul style="list-style-type: none">nWARID Telecom Uganda,nHiTs U Limited,nInfocomn Africa on LinenAfsat Communications U LtdnI – Tel LtdnDatanet.Com LLCnAnupam GlobalSoft U LtdnTMP Uganda Ltd
PSP (Voice and Data) + Capacity resale	<ul style="list-style-type: none">nSatellite Communications networknInternational Telecom Limited
Capacity Resale Only	<ul style="list-style-type: none">nTalk teleKom solutions Limitedn Roke Investment Internationaln Mo Telecom International LimitednYo Uganda LtdnFastcom Limited

Telecom Operators ...

PSP Voice
and Data
Only

- n Kampala Siti Cable Ltd,
- n Nomad Com Ltd,
- n Multi Choice Uganda Ltd,
- n Link U Wireless,
- n Bukasa Telecom Intl Ltd,
- n RCS Ltd,
- n Kanodiko Systems Ltd,

Telecom operators

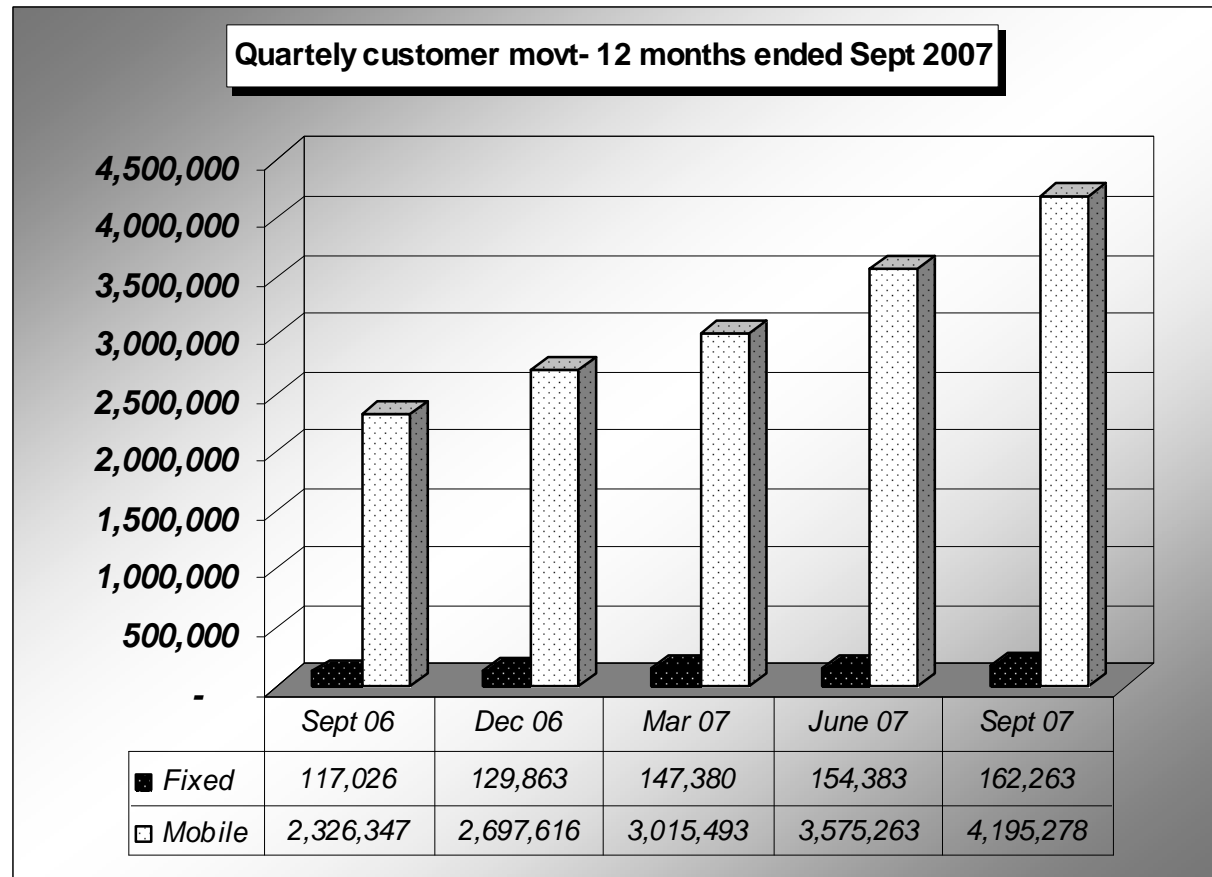
National Telecommunications Licensees	<ul style="list-style-type: none">n MTN U Ltdn Uganda Telecom Ltd
Cellular Telecommunications Operator	Celtel Uganda Ltd

Telephony- Voice Market- Sept 2007

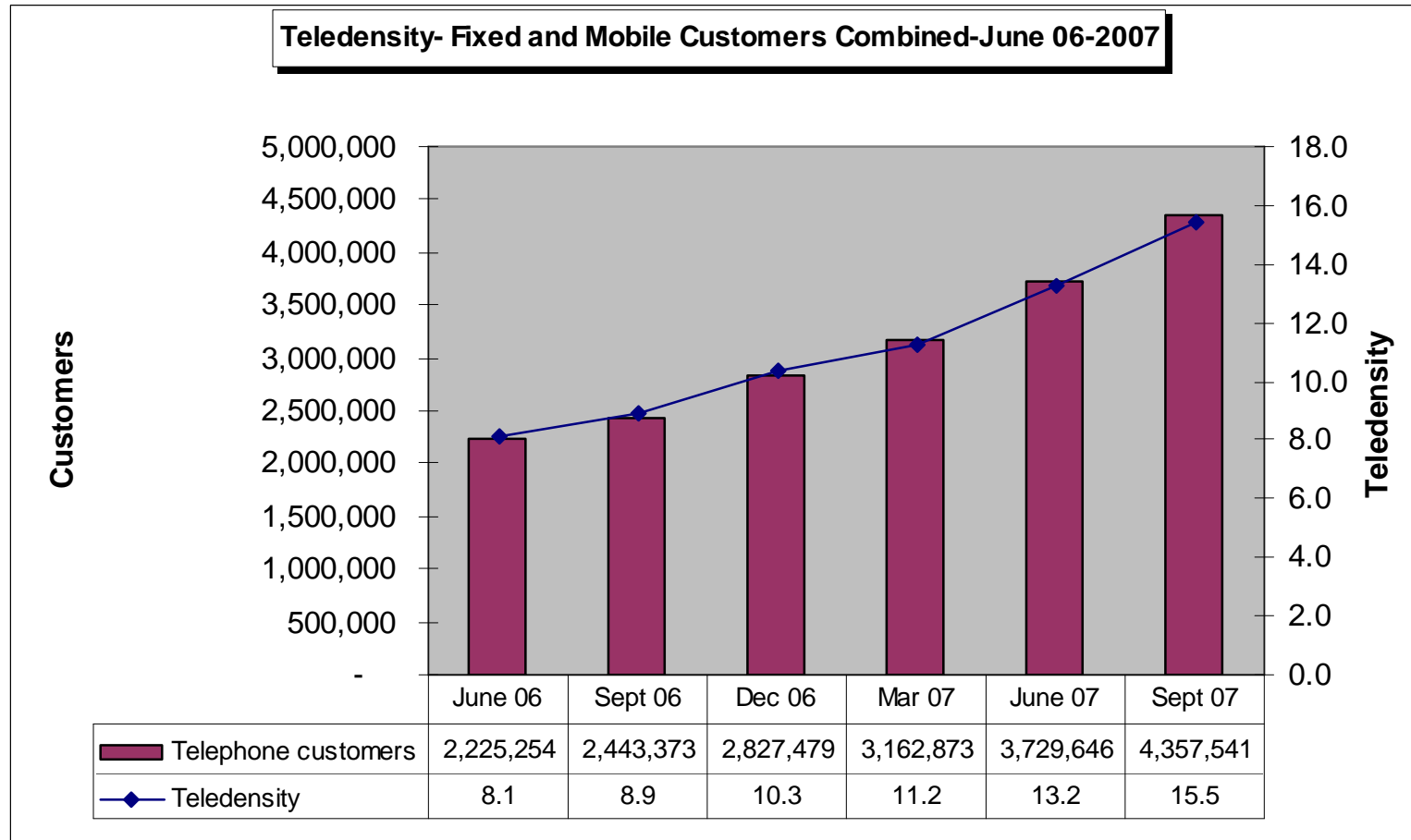
Number
Customers- Sept
2007

Mobile Voice:
4,195,278

Fixed customers:
162,263

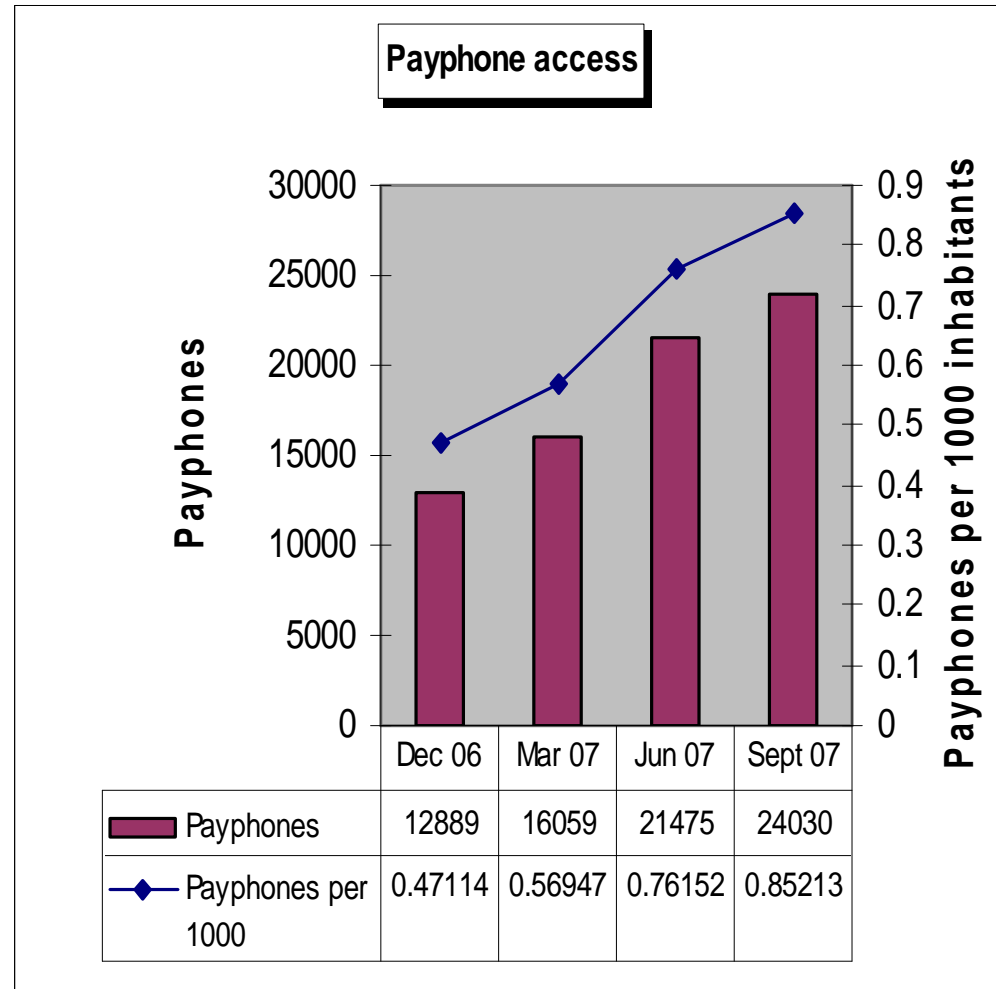


Telephone Penetration



Telephony- Voice Market

- n Pay phones- September 2007 installed by operators (3) and excludes phone kiosks set up by private businesses.



Telephony- Voice Market

Voice Traffic (combined for fixed and mobile)
July - Sept 2007

n Domestic traffic

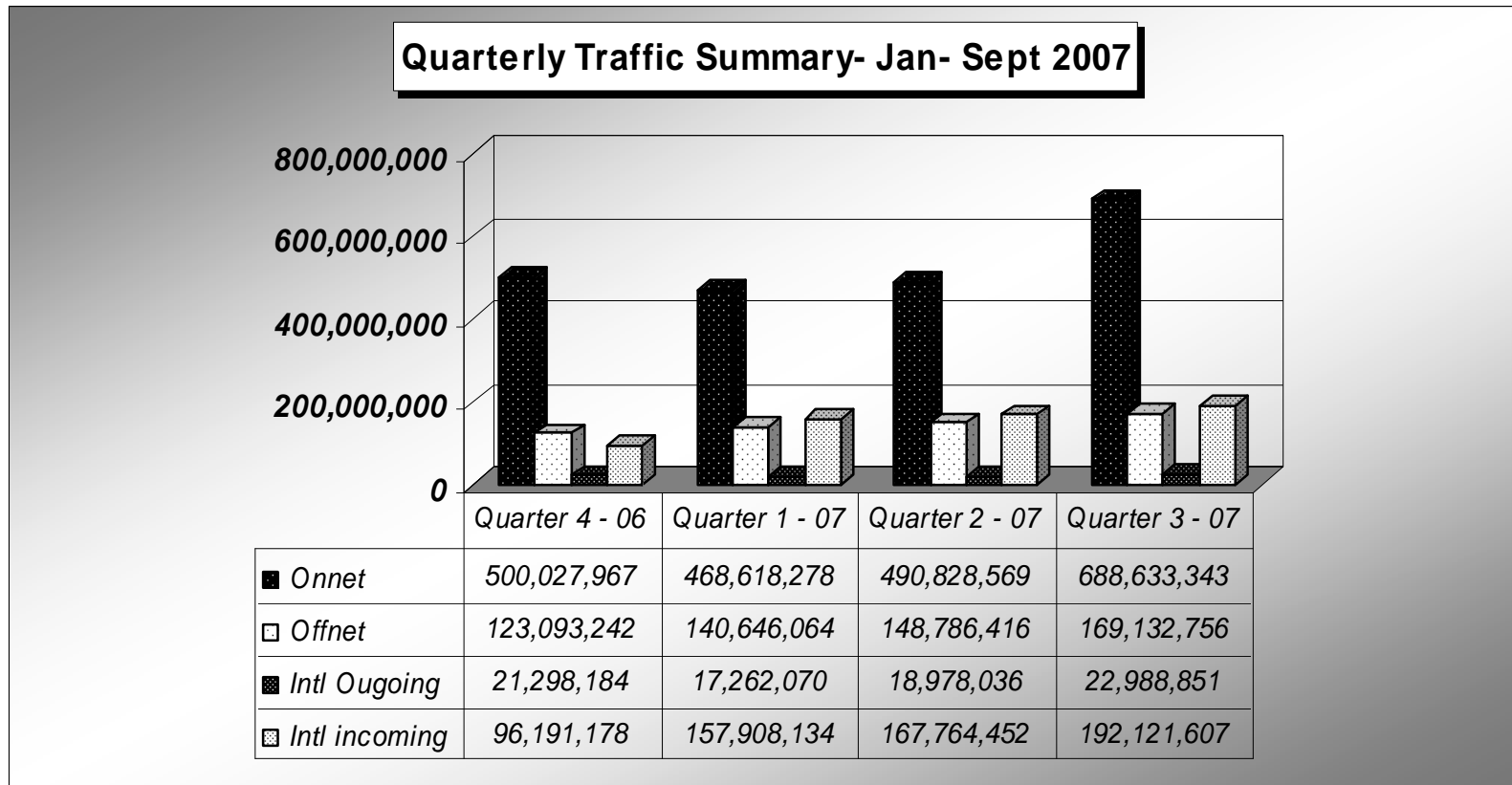
- n Total On net traffic = 688,633,343 minutes
- n Total Off net traffic = 169,132,756 minutes

n International traffic

- n Incoming international traffic = 192,121,607 minutes
- n Outgoing international traffic = 22,988,851 minutes

Telephony- Voice Market

Quarterly Telephone Traffic



Telephony- Voice Market

Tariffs September 2007

n Mobile- Average 1 minute call Peak

- n On net tariffs – UGX 430
- n Off net tariffs – UGX 500
- n International tariffs – UGX 700

n <http://www.ucc.co.ug/prepaidMobileTariffs.pdf>

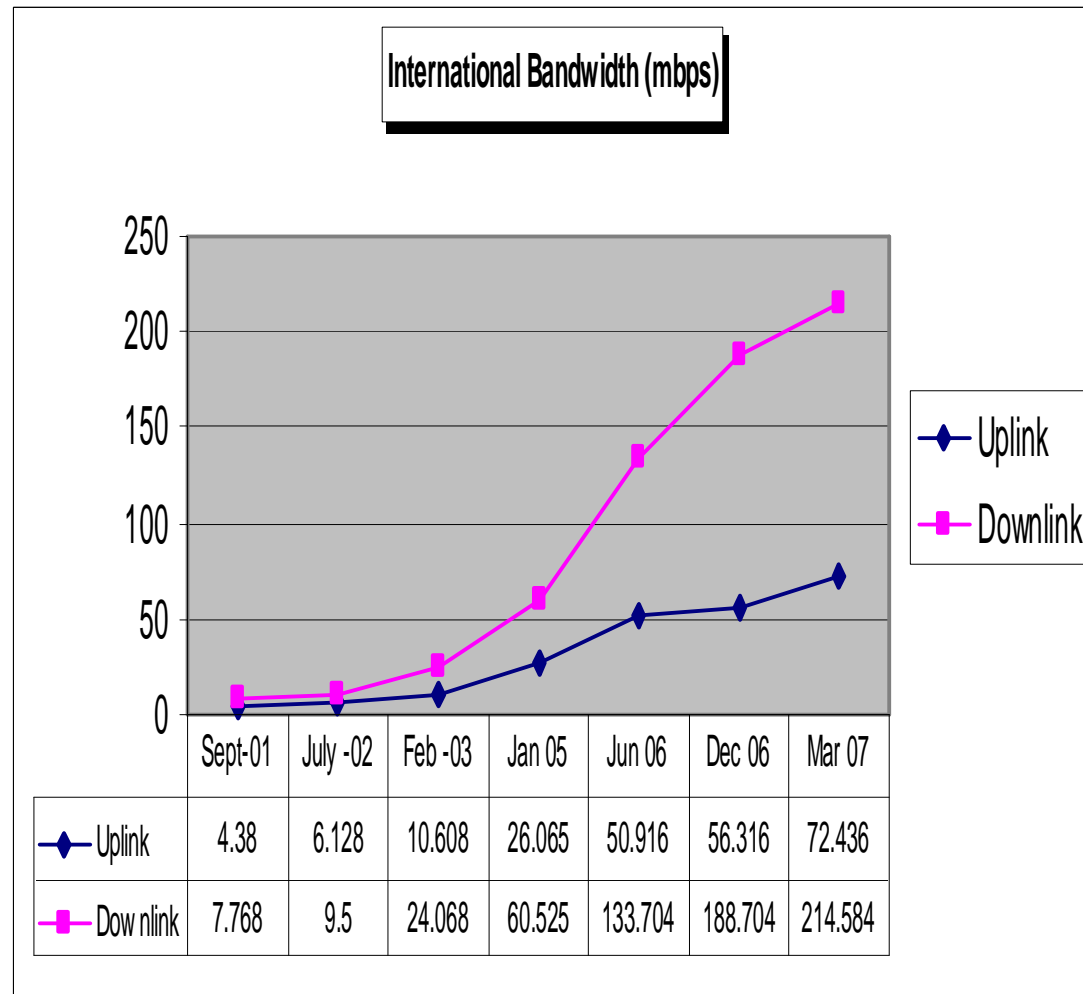
n <http://www.ucc.co.ug/internetTariffs.pdf>

n <http://www.ucc.co.ug/fixedLineTariffs.pdf>

Telephony- Data

International Bandwidth.

- q Uplink: 72.43 Mbps
- q Down link: 214.58 Mbps
- n 900 Kms of fiber optic (private and public own) laid



Post and Courier Market

Regional and Intn. Operators; September 2007

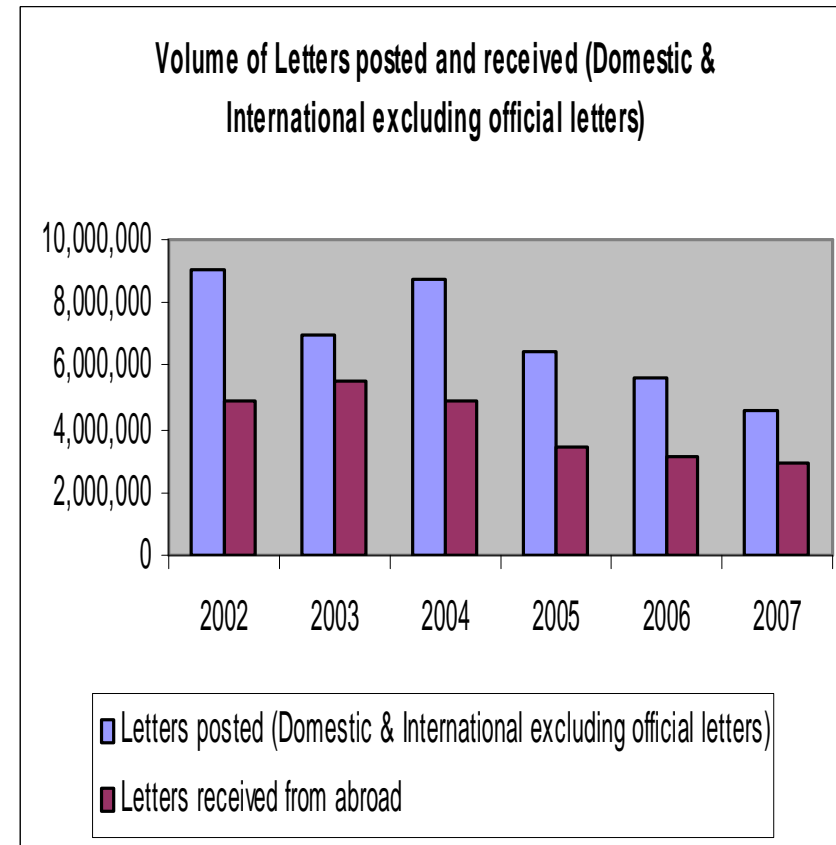
Major Postal Operator	<ul style="list-style-type: none">n Uganda Post Ltd
International Couriers	<ul style="list-style-type: none">n DHL Intl Uganda Ltdn Daks Couriers Ltdn Skynet World Wide Expressn East African Courier Ltd (Fedex)n Mitchell Cotts U Ltd
Regional Couriers	<ul style="list-style-type: none">n Akamba Public Road Servicen Nation Carriers Uganda Ltdn Scandinavian Express Uganda Ltdn Standard Expressn Gateway Bus Services Ltdn Regional Coach Services Ltd

National Operators

<h2>Domestic Courier service Providers</h2>	<ul style="list-style-type: none">n ELMA Express Delivery Ltdn Yellow Pages Express Ltdn Express Network Ltdn Ultimate Security Ltdn Planet Courier Servicesn Fast Flight Expressn Victoria Insglass Ltd
---	--

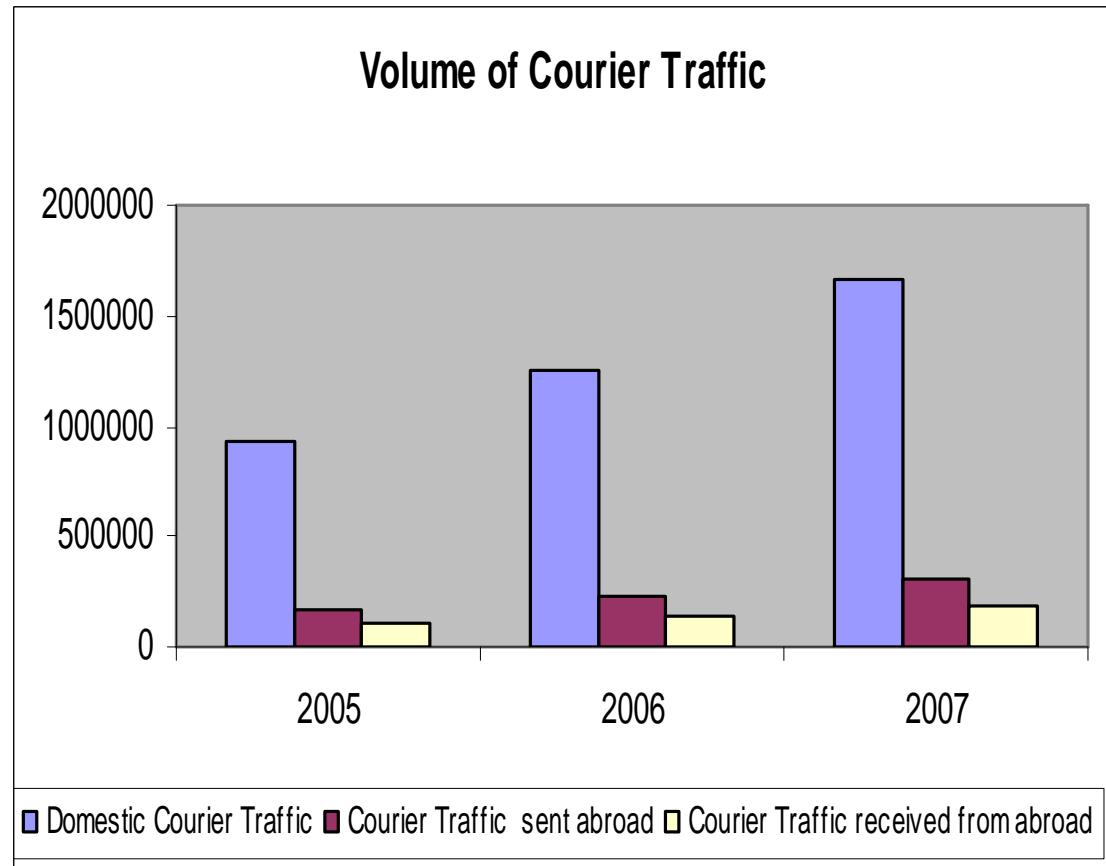
Post and Courier Market

- n Volume of traffic is measured by the number of letters, parcels and registered items.
- n There has been a gradual decline in volume of letter posted and received domestically and abroad
- n For FY 06/07 the average decline was by 12%
- n Competition from new services such as internet and mobile messaging accounts for such declines



Post and Courier Market

- n Parcels and registered mail have however continued to register increased growth
- n For the FY 2006/07, volume of parcels, domestic and international grew by 33%
- n Increased activity in the international market accounts for the growth



Broadcasting- Sept 07

Licensed Radio stations	Operational	153
	Non operational	35
Licensed TV	Operational	25
	Non Operational	5