

MINISTRY OF TOURISM WILDLIFE AND ANTIQUITIES

**NATIONAL TOURISM SECTOR DEVELOPMENT PLAN
2015/16 – 2019/20**

April 2015

FOREWORD

Tourism is a key driver of Uganda's economy and represents a significant opportunity to the attainment of Uganda Vision 2040. The sector is Uganda's largest services export, having provided direct contribution of US\$ 979 million in 2013, and 2.8% of total employment in Uganda. More growth in the sector is expected over the next five years, thus calling for the development of the Sector Development Plan as a timely intervention and a step in the right direction. This plan is built around the aspirations of the National Development Plan II 2015/16 – 2019/20, and complements the Uganda Tourism Master Plan.

The Tourism Sector Development Plan (TDSP) focuses on unlocking the binding constraints in five priority areas namely; marketing and promotion, human resource development, product development, natural and cultural resource conservation and tourism management and regulation. These priorities emerged out of wide national consultations and are also aligned with the NDPII priorities.

Identified priority projects to be implemented under this plan have been regionalized in order to equitably spread the development of the sector nationally. This is a highly commendable initiative.

I wish to express my sincere gratitude to the National Planning Authority for coordinating the process, the World Bank for funding the TDSP, my Ministry for facilitating the sector co-ordination and the consultants who diligently worked hard to ensure the development of a commendable plan.

I urge all the stakeholders to play their rightful role in ensuring effective and timely execution of their mandate, in order to attain the transformation of Uganda's tourism sector to a level that will bring pride to all Ugandans.



Hon Dr. Maria Mutagamba (MP)

MINISTER OF TOURISM, WILDLIFE AND ANTIQUITIES

Table of Contents

List of Acronyms	v
1.0 Strategic Overview.....	7
1.1 Tourism Sector Vision Statement	7
1.2 Mission of the Ministry of Tourism, Wildlife and Antiquities.....	7
1.3 Mandate of the Ministry of Tourism, Wildlife and Antiquities.....	7
1.4 Legal Framework	8
2.0 Situation Analysis	9
2.1 Tourism Contribution to GDP	9
2.2 Tourism contribution to local economies	10
2.3 Uganda Tourism Demand side competitiveness.....	12
2.4 Competitiveness of tourism investment incentives.....	15
2.5 Summary of challenges and binding constraints for the tourism sector	18
3.0 Strategic objectives	21
4.0 Implementation Framework.....	23
5.0 Monitoring and Evaluation Framework.....	23
6.0 Projected Investment and Plan Financing Mechanism	25
6.1 Basis of expenditure/investment projections	25
6.2 Basis of income/revenue projections to the Sector	26
6.3 Projected Financing Gap 2015/16 – 2019/20.....	27
6.4 Plan Financing Mechanisms	29
6.5 Summary of Total Investment Costs Annualised (US\$).....	30
7.0 Critical Success Factors	30
Bibliography	32
Appendix 1: Strategic Actions and Expected Outcomes	34
Appendix 3: The Tourism Sector Development Work Plan and Budget.....	56
Appendix 4: Monitoring and Evaluation Framework.....	57
a) <i>Marketing and Promotion</i>	57
b) <i>Human Resources Development</i>	63
c) <i>Tourism Management and Regulation</i>	66
d) <i>Logical Framework: Natural and Cultural Heritage Conservation</i>	69

<i>e) Tourism Product Development</i>	71
Appendix 5: The Core Markets of Focus for Uganda.....	75
Appendix 6: Cascading Model for Training of Trainers	79
Appendix 7: List of selected stakeholders consulted.....	80
Appendix 8: Tourism forecasts (arrivals and receipts).....	84
Appendix 9: The Celes International Consulting Team	84

List of Acronyms

4WD	Four Wheel Drive
AUTO	Association of Uganda Tour Operators
AWPs	Annual Work Plans
B & B	Bed and Breakfast
CAA	Civil Aviation Authority
CBOs	Community Based Organisations
CNDPF	Comprehensive National Development Planning Framework
DRC	Democratic Republic of Congo
EAC	East African Community
EIA	Environmental Impact Assessment
FDI	Foreign Direct Investment
GDP	Gross Domestic Product
HRD	Human Resource Department
IBA	Important Bird Area
ICTs	Information and Communication Technologies
IT	Information Technology
LGDPs	Local Government Development Plans
M&E	Monitoring and Evaluation
MDAs	Ministries, Departments and Agencies
MFPED	Ministry of Finance, Planning and Economic Development
MICE	Meetings, Incentives, Conventions and Exhibitions
MoIA	Ministry of Internal Affairs
MoLG	Ministry of Local Government
MTWA	Ministry of Tourism, Wildlife and Antiquities
NCHE	National Council for Higher Education
NDPs	National Development Plans
NEMA	National Environment Management Authority
NFA	National Forestry Authority
NGO	Non-government Organisation
NPA	National Planning Authority
OPM	Office of the Prime Minister
PAs	Protected Areas
SIPs	Sector Investment Plans
SMEs	Small and Medium Size Enterprises
TOTs	Trainers of Trainers
TSDP	Tourism Sector Development Plan
TUGATA	The Uganda Air Travel Agents Association
UBOS	Uganda Bureau of Statistics
UGX	Uganda Shilling
UHOA	Uganda Hotel Owners Association
UIA	Uganda Investment Authority
UICTHP	Uganda Institute of Certified Tourism and Hospitality Professionals
UK	United Kingdom
UMA	Uganda Manufacturers Association
UNAA	Ugandan North American Association
UNWTO	United Nations World Tourism Organisation
USA	United States of America
USAGA	Uganda Safari Guides Association
USDs	United States Dollars

UTA
WHS
WTM

Uganda Tourism Association
World Heritage Site
World Travel Market

1.0 Strategic Overview

The Government of Uganda in 2007 approved the Comprehensive National Development Planning Framework (CNDPF), which provides for the development of a 30 year Vision to be implemented through: Three (3) 10 year plans; six (6) 5 year National Development Plans (NDPs); Sector Investment Plans (SIPs); Local Government Development Plans (LGDPs); Annual Work Plans (AWPs) and budgets. To operationalize this planning framework, Government formulated the Uganda Vision 2040 in 2013 to provide a development path and direction in transforming Uganda from a peasant society into a modern and prosperous country targeting to attain a competitive upper middle income status by 2040. This vision is conceptualized around strengthening the fundamentals of the economy to harness the abundant opportunities around the country. Tourism is one of those core sectors that are currently grossly underexploited yet with potential to lead Uganda's attainment of Vision 2040. This industry is highlighted as one of the key opportunities that are expected to play a major role in the economy and to be a major contributor to GDP by 2040.

The tourism sector has therefore to be well planned, developed and monitored. The Tourism Sector Development Plan is built around the aspirations of National Development Plan II. The plan is consistent with the tourism master plan (2014/15 – 2024/25) by generating specific interventions and budgeted projects that lie on the critical path of tourism development over the period 2015/16 – 2019/20. The plan focuses on five core areas that were identified in the issues paper. These areas are marketing and promotion, human resource development, product development, natural and cultural resource conservation, and tourism management and regulation. There are detailed projects for each of the five core priority areas with detailed work plans and M&E frameworks.

1.1 Tourism Sector Vision Statement

The vision of the tourism sector is *sustainable tourism, wildlife and cultural heritage contributing to the transformation of the Ugandan society from a peasant to a modern and prosperous one.*

1.2 Mission of the Ministry of Tourism, Wildlife and Antiquities

The mission of the ministry is *to develop and promote tourism, conserve and preserve natural resources and cultural heritage for accelerated economic growth and social transformation.*

1.3 Mandate of the Ministry of Tourism, Wildlife and Antiquities

The Government through the Ministry of Tourism, Wildlife and Antiquities (MTWA) has a mandate to provide leadership for the total industry as an economic force in the nation by promoting the tourism, wildlife and heritage resources of Uganda into highly competitive and preferred tourist destination with accelerated sector contribution to the national economy.

1.4 Legal Framework

In executing its mandate, the ministry is guided and regulated by a number of policies, laws, regulations and guidelines. Notable of these are; Constitution of the Republic of Uganda (1995), Tourism policy (2014), Tourism Act (2008), Uganda Wildlife Act (2000), Historical Monuments Act (1967) as well as the Universities and other Tertiary Institutions Act (2001). All these policies and Acts mandate the Ministry of Tourism, Wildlife and Antiquities (MTWA) in conjunction with the sector Agencies to set policy, oversee, monitor and coordinate the tourism sector development.

Specifically the Government's roles are to: (i) formulate medium to long-term tourism policy, plan for tourism development, and regulate tourism activities through legislation, licensing and classification; (ii) monitor performance on quality, safety and targets; (iii) facilitate tourism development by providing the infrastructure, economic, regulatory, fiscal and political environment that encourages investment and orderly growth; and (iv) ensure adequate funding for the marketing of Uganda as an attractive tourist destination.

The tourism sector is guided and supervised by at least seven Government institutions that work closely with a number of private sector institutions spread across the country. The mainstream government institutions in charge of tourism are: Ministry of Tourism, Wildlife and Antiquities, Uganda Tourism Board (UTB), and Uganda Wildlife Authority (UWA). Other government institutions that support tourism are the Uganda Investment Authority (UIA) – for investment promotion, Ministry of Education and Sports (MOES) – for tourism-related training, Ministry of Works and Civil Aviation Authority - for Airline development and regulation, Ministry of Health, Ministry of Works and UNRA - for Tourism Roads.

At the local government level, all district governments are mandated to offer front-end service delivery in all sectors including tourism, however the sector continues to lack effective representation within the local government structures.

Guiding Sector Policy

The Tourism Development is guided by the National Tourism Policy 2014 whose objective is to ensure the delivery of a step-change in the development and functioning of the tourism industry, in order to realize Uganda's great but unexploited potential as a major tourist destination. The Policy emphasizes that by 2024, Uganda should offer a broad and enticing range of tourism products and activities, based on its wealth of natural assets and its rich cultural heritage. The tourism sector should have evolved into a major and sustainable source of revenue and employment across the country, thereby making a substantial contribution towards overall social and economic development. In order to reinforce the aspirations of the tourism policy, the tourism development master plan (2014-2024) identifies the following as 10-year development objectives for tourism in Uganda:

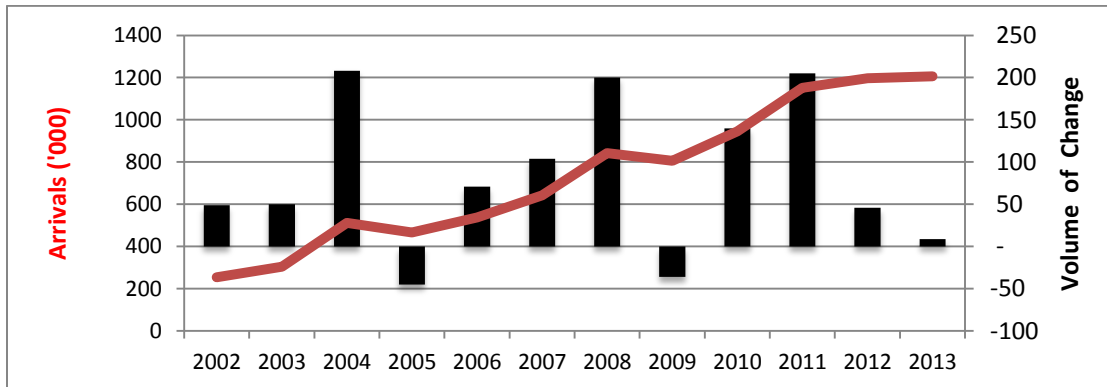
- i. To develop and diversify the tourism products and services
- ii. To develop tourism infrastructure and facilities
- iii. To promote and market the destination in national, regional and international markets
- iv. To develop human resource and institutional capacity for the tourism sector
- v. To enhance regulation, coordination and management of the tourism sector
- vi. To promote community involvement and enterprise development in the tourism economy
- vii. Promote safety and security of tourists and tourism assets
- viii. Promote local, regional and global partnerships for tourism development
- ix. Promoting conservation of natural and cultural heritage resources

2.0 Situation Analysis

2.1 Tourism Contribution to GDP

Uganda Vision 2040 identifies tourism as one of the opportunities that should be harnessed to propel Uganda to a middle-income status. Uganda's inbound visitor numbers have almost constantly grown over the past 20 years to reach 1.206 million visitors in 2013 (7.9% of GDP).

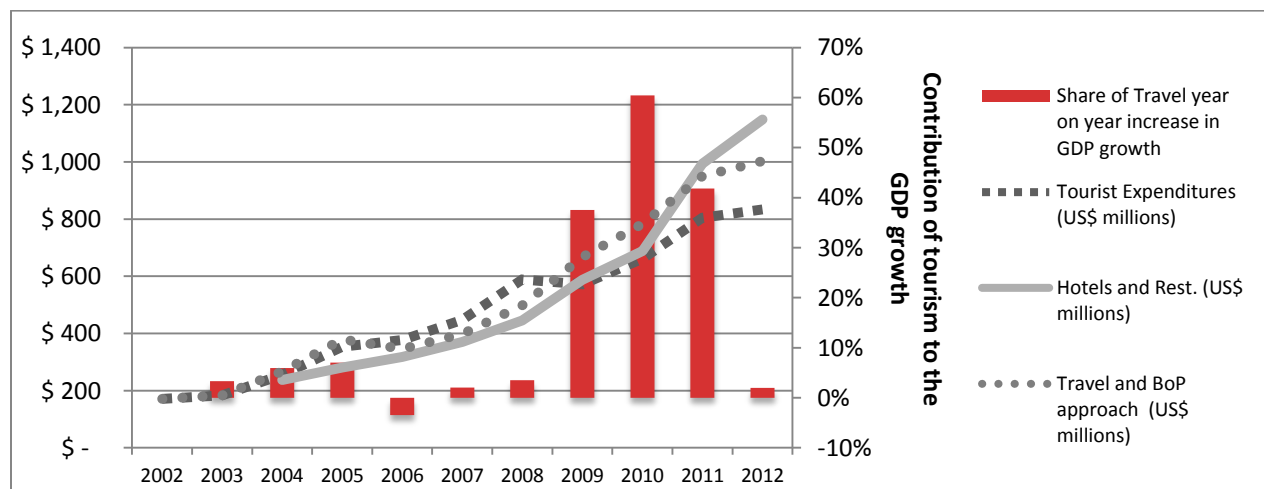
Figure 1: International visitor arrivals to Uganda (2002-2013)



Source: Tourism Issues Paper, 2014

However, after three years of a strong contribution to Gross Domestic Product (GDP) growth (2009-2011), tourism currently follows a sudden and worrisome period of stagnation both in arrivals (a 0.8% increase between 2012 and 2013) and in its contribution to GDP (Figure 2). While incidences of Marburg and Ebola in the Western Uganda and the economic meltdown in the source market countries were identified as responsible for this decline, the numerous recent accolades received by Uganda (Best destination 2012, Kidepo Valley as one of top 10 national parks in Africa, etc.) did not help to mitigate the consequences of the adverse health and world economic environment although tourism growth was sustained in several of Ugandan neighbouring and competitor countries over the same period (e.g. Tanzania, Rwanda).

Figure 2: Contribution of tourism in the balance of payments (2002-2012)



Source: Tourism Issues Paper, 2014

The contribution of tourism to the balance of payments, shows a consistent positive trend for the last 10 years and is indicative of the hotel and Restaurant revenues being higher than international tourist expenditure. This can either be explained by an increase in domestic tourism or an increase in the number of Ugandans going to restaurants and attending conferences in hotels. It also illustrates a two-fold increase in revenues from one of the key segments of the Uganda tourism sector namely the Hotel & Restaurant sub-sector over the past 8 years.

The travel sector is Uganda's largest services export industry, having contributed US\$ 1003 million to Uganda's total export earnings in 2012. According to the Ministry of Tourism, Wildlife and Antiquities, the total impact of the travel and tourism industry went up to US\$ 1,830 million in 2012 (8.8% of GDP and 11% of the services sector). Hotels and restaurants, as defined in the National Account, are making an increasing contribution to GDP growth and also represent a significantly large proportion of the services sector. The data for the year 2009 shows that the hotel and restaurant sector has been more resilient during the financial crisis than the services sector in general. Until 2012, Uganda has experienced a sustained growth in the balance of travel with its average contribution to GDP growth for the last three years at almost 50%, with a peak of 60.5% for the year 2010 (figure 2).

2.2 Tourism contribution to local economies

Tourism presents economic opportunities for regional and remote communities to diversify their livelihoods, generate higher standards of living and create jobs.

Table 1: Number of tourism businesses and employees

	Number of establishments	Number of people
Accommodation and food (2011)	64,602	154,167
<i>Hotel and camping sites</i>	<i>3,876</i>	<i>29,635</i>
<i>Restaurants & Mobile Food</i>	<i>36,413</i>	<i>79,572</i>
<i>Events and other food service</i>	<i>24,313</i>	<i>44,960</i>
Recreation and Personal (2011)	41,766	80,893
Transport (land + air transport) (2011)	445	
Tour Operators (registered) (2013)	113	975
Travel agencies (registered) (2013)	82	
Tour guides (registered) (2013)		325
Community-based enterprises (UCOTA)		2,901
Total		239,261

Source: MTWA and UBOS, 2014

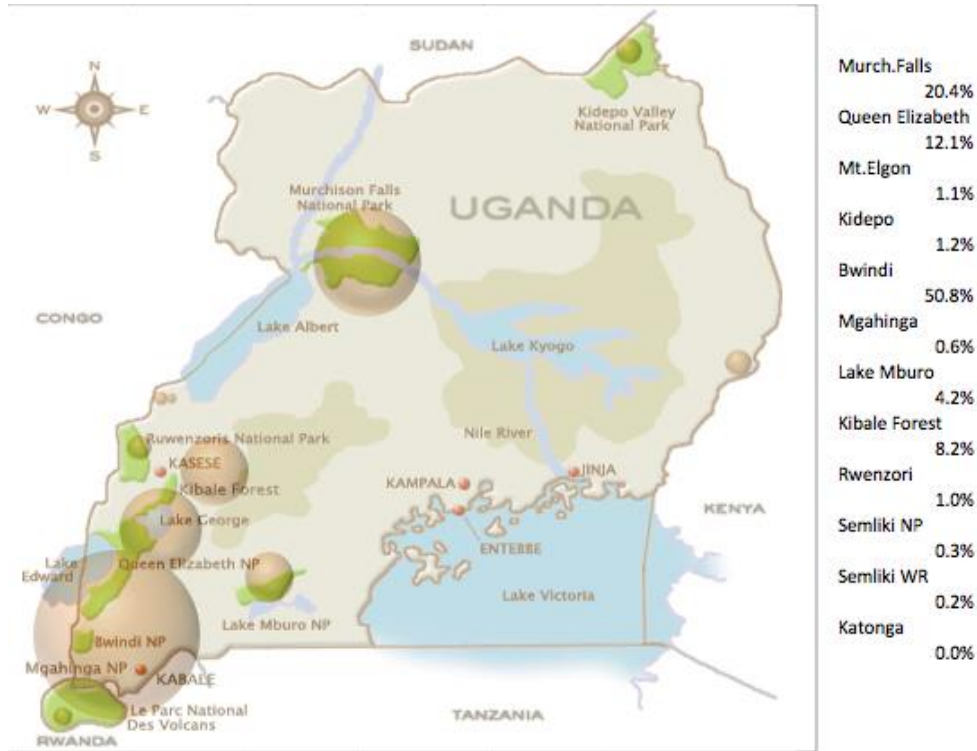
Direct employment in tourism in Uganda reached 191,500 employees in 2014 corresponding to 2.8% of total employment in Uganda. However, cross-aggregate information from several sources about employees in the tourism sector, excluding the transport sub-sector indicates a significant difference with the WTTC figure (+25%). The difference stems from the issue of the definition of the tourism industry that still impedes the evaluation of the sector's impact. It is important to note that tourism benefits close to 3000 people working in community-based enterprises mostly located in the vicinity of national parks which is likely to have a strong impact in terms of poverty reduction.

Currently, a major proportion of leisure tourism expenditures in Uganda is generated in the regions where national parks are located. The case of Bwindi Impenetrable Forest where Gorilla permits cost \$ 600 received more than half of these expenditures (51%)¹. Although Queen Elizabeth National Park has been

¹UWA is planning to raise the price of Gorilla permits to \$600 as from January 2015.

the most visited national park for more than ten years now, Murchison Falls National Park became the main attraction for international leisure visitors in 2013 with 70,798 visitors (UBOS, 2014).

Figure 3: Visitor expenditures to national parks



Source: Tourism Issues Paper, 2014

The progressive improvement of living conditions, and the emergence of a Ugandan middle class, also represents an enormous potential market with numerous opportunities for the regions. The recent survey on domestic tourism in Uganda (2013) shows that this segment constitutes a significant portion of the tourism sector in the local economy.

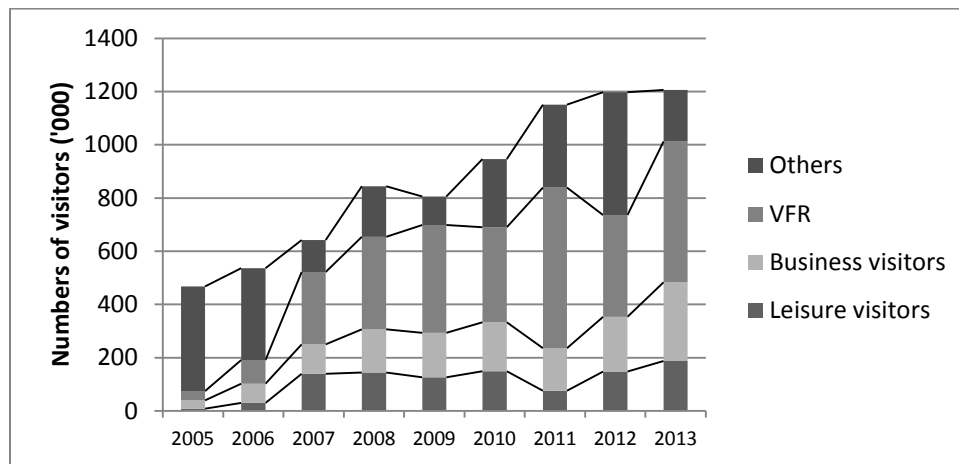
Tourism stimulates the production of goods and services in a wide range of sectors and sub-sectors representing a value chain, e.g. construction, furniture and fittings, agriculture, fisheries, food growing, processing and light manufacturing, healthy water, education, handicrafts, as well as transport, telecommunications and financial services. Within only the following three crafts sectors - wood carving, textiles and clothing, and jewellery - a minimum of 1489 Ugandan youths and women were recorded as being suppliers of products to the tourism sector (ITC, 2011).

Tourism-based industries including hotels and restaurants, and transport and communication, contributed 7.3% and 7.9 % respectively of employment (Mwaura & Ssekitoleko, 2011). By 2011, a total of 15,565 persons were employed in the accommodation sub-sector across the country - excluding accommodation establishments in Kampala and Wakiso districts (MTWA, 2012) - and 14.6 % of total employment (630,830 jobs). The tourism sector contributed 14 % of the total registered businesses in the country (UBOS, 2011) and this presented the sector as second largest after trade (61%). The number of enterprises in the sector increased by 214% in the last decade (UBOS, 2011). For some regions, including national park areas, Fort Portal, Entebbe and Kampala tourism forms a relatively large share of their regional economy.

2.3 Uganda Tourism Demand side competitiveness

For the last 10 years, with an average growth of 16.8% of international arrivals per year (2003-2013), Uganda has successfully begun to capture a very small part of the global tourism growth and flow of international visitors. While the dramatic drop in arrivals of leisure visitors (-49%) for the year 2011 does not seem to be relevant (the number of visits by non-resident foreigners/visitors increased during the same period), leisure visitors however only account for an average of only 15-16% of all international arrivals to Uganda.

Figure 4: Visitors arrivals by category



Source: UBOS

The VFR segment (Visit Friends and Relatives) remains the largest market in the country with 44% of international arrivals in 2013. Africa accounts for 78% of arrivals to Uganda (of which 68% are from neighbouring countries). This is why the majority of the non-resident arrivals use road transport as a mode of travel. The number of non-resident arrivals by road increased from 535,000 to 783,000 during the period 2009-2013². Looking at the market segments and especially the leisure markets, the European (9%) and the American (6%) markets which are two of the highest spending markets accounted for less than one fifth of all international visitor arrivals in 2013 (figure 4).

Furthermore, over 40% of tourists visiting Uganda also visit other African countries on the same trip mainly Kenya (20%), Tanzania (12%), and Rwanda (10%)³. About 20% of all leisure tourists are package tourists. The competitiveness analysis⁴ of the Ugandan Tourism Industry however shows that the reversal in growth trend for the highest spending markets cannot be explained by the economic meltdown in the source market countries. Although Uganda was competitive in some markets (Africa, Americas and Middle East) until 2010, its absorption of these markets was lower than that of its neighbouring countries (table 2).

² Migration and Tourism Statistics 2012-2013, UBOS

³ Economic and statistic analysis of Tourism in Uganda, World Bank

⁴The measurement of competitiveness adopted here is drawn from the work of Khao-Sard and Unthong (2005).

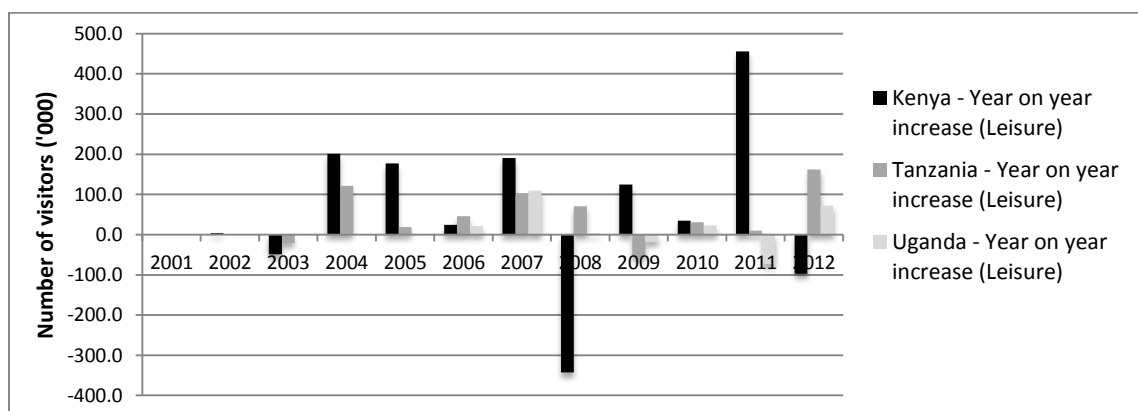
Table 2: Market share for Uganda in key source markets (2008-2012)

Outbound markets	Year	Countries of destination					Trend for Uganda
		Rwanda	Kenya	Tanzania	Zimbabwe	Uganda	
Africa	2008	1.33	0.18	0.77	1.41	1.18	Maintaining market share
	2010	1.33	0.28	0.81	1.41	1.16	
	2012	1.39	0.37	0.72	1.38	1.24	
Americas	2008	0.83	1.32	2.04	0.39	1.14	Losing market share
	2010	0.84	1.38	1.53	0.52	1.17	
	2012	0.46	1.79	1.35	0.46	0.83	
East Asia and the Pacific	2008	0.25	2.20	0.99	0.77	0.42	Lagging opportunity
	2010	0.29	1.92	1.05	0.72	0.57	
	2012	0.31	1.33	1.68	0.84	0.77	
Europe	2008	0.30	2.78	1.31	0.23	0.51	Losing market share
	2010	0.34	2.46	1.32	0.24	0.51	
	2012	0.31	2.14	1.56	0.32	0.46	
Middle East	2008	1.03		2.98	0.12	2.64	Losing market share
	2010	0.92		2.61	0.18	3.36	
	2012	0.11	2.86	1.16	0.04	0.39	
South Asia	2008	2.42		2.32	0.22	1.90	Losing market share
	2010	2.56		2.90	0.21	1.89	
	2012	0.34	2.54	1.34	0.03	0.50	

Source: Tourism Issues Paper, 2014

Additionally, table 2⁵ indicates that Kenya and Tanzania have shown market growth in the key leisure markets (Americas, Europe and Oceania) but Uganda's market absorption rates have been declining for the same markets. Uganda's index of competitiveness in the major markets shows a negative trend from 2008 to 2012. This trend is illustrated in the figure below where the annual increase of leisure tourists to Uganda is the lowest in comparison to Tanzania and Kenya. For the European market alone, this loss⁶ represents about US\$ 50 million per year.

Figure 5: Comparison of Leisure visitors (Kenya, Tanzania, and Uganda: 2001-2012)



Source: UNWTO DATA, 2013

The slow progress in the share of leisure visitors to national parks corroborates the findings of the competitiveness analysis, highlighting market share decline in the region. Such a trend reflects the low

⁵The direction of change in the ratio over the years 2010-2012 and the changes in the absorption rate of the host markets has been examined. The change in the general trend here is defined as the change in the number of outbound visitors from that particular market to competing destinations.

⁶ The loss is calculated using the difference between the CAR and 1 for the European market.

impact of recent marketing strategies. The current low number of commercial flights to national parks, due to low bed capacity, has tended to force visitors to travel by road, making trips time-consuming and less enjoyable. According to Aerolink, an airline serving regional airfields in Uganda, bed capacity is a challenge in Kihhi, Kisoro and Kidepo, which are the destinations that offer a different product as compared to the rest of East Africa. Plans for regular regional flights between Entebbe and the Albertine Rift (in the western part of Uganda) are highly desirable (World Bank, 2012), “yet having an international airport in the Albertine Rift would further reduce travel times and therefore make Uganda more competitive”.

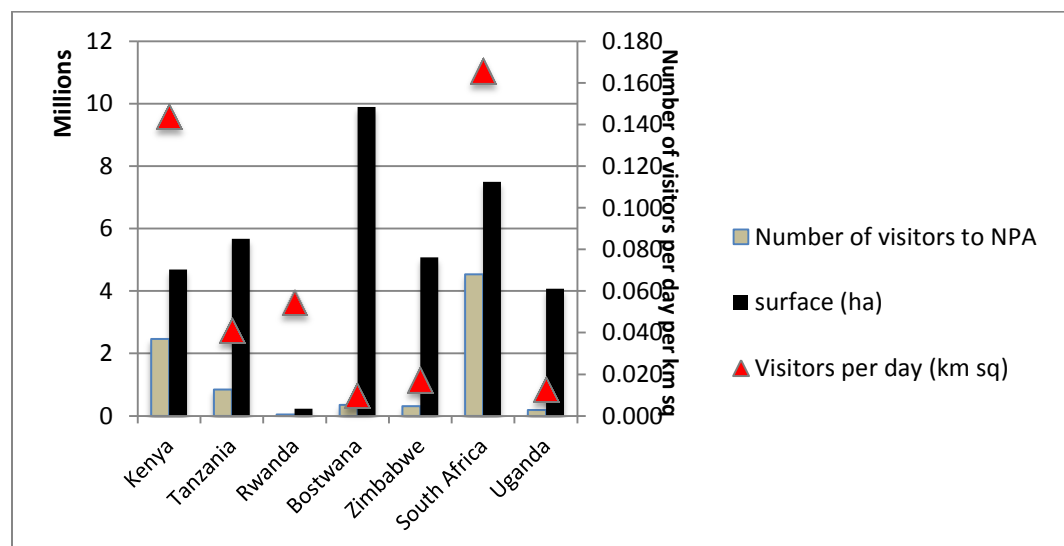
Table 3: Visitors to National Parks (2005-2013)

Visitors (citizens and foreigners) to national parks (000s)	2005	2006	2007	2008	2009	2010	2011	2012	2013
	129.000	110.092	126.553	134.486	151.818	190.112	207.994	182.189	213.950
Non-resident foreigners	32%	42%	42%	39%	40%	39%	39%	45%	47%
Resident foreigners	9%	11%	10%	10%	9%	7%	7%	9%	8%
Resident citizens - EA	13%	15%	19%	18%	20%	21%	21%	24%	24%
Students	26%	22%	22%	28%	28%	30%	30%	21%	20%
Others	20%	11%	7%	5%	3%	3%	3%	1%	1%

Source: Tourism Issues Paper, 2014

The commercial exploitation of the Ugandan national parks is far lower than that of its major competitors. The average number of visitors to Uganda’s NPs per day per square kilometre only represents 7.7% and 8.9% compared to South Africa and Kenya. In other words, South Africa and Kenya receive ten times more visitors per day per square kilometre in their national parks than Uganda.

Figure 6: Commercial exploitation of NPA per sq km (2010)



Source: Tourism Issues Paper, 2014

If the low rate of visitors per day per square kilometre to national parks represents a comparative advantage for Uganda, the country has opportunity to maximise its carrying capacity in the national parks.

Despite gorilla tourism being the single most important asset over which Uganda has an absolute comparative advantage over Kenya and Tanzania, 39,744 gorilla permits remained unsold for the years 2007-2013. This missed opportunity represents a substantial loss of US\$ 19.8 million for the period 2007-2013⁷. The additional lost tourist expenditures, which would have been made if these permits had been sold, amounts to nearly US\$ 60 million dollars over the same period. Besides, the opportunities that other National Park Areas (NPA) offer to the Ugandan economy are not yet being fully harnessed.

In order to improve equitable resource distribution, a share of the entrance fees to national parks (20%) is transferred to local districts through, offering the local population opportunity to submit project proposals. However, limited skills and planning at local district level impede the implementation of projects that would offer better economic and employment alternatives to the local population.

Table 4: Revenue from national park entrance fees shared with communities

Revenue shared with communities	2007	2008	2009	2010	2011
	UGX	UGX	UGX	UGX	UGX 1,089,195,275
	\$ 406,372	\$ 159,775	\$ 191,897	\$ 102,891	\$ 422,945
Approximate available revenue (20%) of NP entrance fees	\$ 2,258,188	\$ 2,334,623	\$ 2,584,448	\$ 3,113,213	\$ 3,413,799
Used amount	18.0%	6.8%	7.4%	3.3%	12.4%

Consequently, only 8.7% of available revenue was used for the years 2007-2011, representing more than \$ 12.4 million of unutilised money originally intended to benefit local communities (table 4).

2.4 Competitiveness of tourism investment incentives

According to the Uganda Bureau of Economic, Energy and Business Affairs, “*strong economic growth, open markets, and abundant natural resources provide good opportunities for knowledgeable investors in Uganda, though significant challenges such as poor infrastructure, high energy and production costs, and corruption can make Uganda a difficult investment climate*”. In 2001, the government created the Uganda Investment Authority (UIA) to assist foreign and domestic investors. Uganda’s potential for larger amounts of FDI in tourism is however still hampered by weak infrastructure, insufficient electricity and high energy costs, and the lack of a skilled workforce. Numerous policies and programmes aimed at improving competitiveness have been implemented over the last fifteen years (CICS II, 2011-2025) including investment incentives offered to investors accompanied with reforms to ease business transactions. A “Business in Development Network Guide to Uganda” is available on the Internet. In a bid to improve Foreign Direct Investment, there is need to ensure better maintenance of the UIA’s Internet Website.

Uganda’s fiscal incentive package for both domestic and foreign investors provides generous capital recovery terms, particularly for medium- and long-term investors whose projects entail significant plant and machinery costs and involve significant training. In Kampala, 50 percent of capital allowances for plant and machinery are deductible from a company’s income on a one-time basis; elsewhere in Uganda, 75 percent of those capital allowances are deductible. 100 percent of training costs are deductible on a one-time basis. A range of annual VAT deferments, deductions, exemptions and depreciation allowances also exist, resulting in investors often paying no tax at all in the first year of their investment, and usually

⁷Considering that a permit costs US\$ 500.

paying substantially less than the 30 percent corporate tax rate in the subsequent years of their investment. The Government also provides a 10-year tax holiday for investors engaged in export-oriented production and, if the investment is located more than 25 kilometres away from Kampala, for agro-processing investors.

The efficiency of the economic incentives can be measured against a set of indicators such as the number of international hotel chains operating in Uganda. The most represented international chains in all four countries are Serena Hotels (19 establishments) and PROTEA (6 establishments), both majorly operating in Southern and Eastern Africa. Kenya has the highest number of rooms by international hotel chains while Tanzania leads in the number of establishments because it has several small high-standard tented camps and lodges located in the Tanzanian Natural Parks. The Ugandan international chain hotels are almost all located in the city of Kampala (and one is at the airport of Entebbe). This limits Ugandan employees' ability to acquire world class hospitality skills.

Table 5: International hotel chains operating in Uganda and neighbouring competitors

Countries	Number of hotels	Number of rooms	Average number of rooms/establishment
Kenya	14	1118	79,9
Rwanda	2	178	89,0
Tanzania	18	438	25,8
Uganda	7	665	95,0

Source: Tourism Issues Paper, 2014

Corruption, tax and business start-up emerge as the top three business environment constraints to competitiveness according to the CICS stakeholders. However some of the improvement made, in particular include the removal of exclusivity rights for National Parks' concessions that were a big impediment to investments and competition (only 11 FDIs, registered in the tourism sector in both 2009 and 2010 when exclusion zones were still applicable). UWA is working on reducing the buffer zone for the Marasa Holdings (Mweya, Paraa and Chobe lodges) to a smaller area.

In 2010, 31 tourism investments were approved, of which 19 were foreign-owned, creating 2,310 jobs. Those investments accounted for 5.1% of all investment made in Uganda and constitute an important increase compared with 2009. In 2014, eight tourism demonstration projects are under development by the MTWA to include Kampala Tourism Circuit, Kampala Exhibition and Conference Complex, Lutoboka Beach Development, Source of the Nile, Nile Adventure Trail, Murchison falls visitors facilities, park visitors centres and Fort portal tourism hubs⁸.

Table 6: Regional competitiveness indicators (average lending rate / cost of energy⁹)

	Kenya	Rwanda	Tanzania	Uganda
2013 Average lending rate (% per annum)	17,1	16,3	13,6	23,7
2012 Average lending rate (% per annum)	n/a	17,5	15,46	26,31

⁸ Constraints faced by tourism investors in Uganda (2014), Uganda Invest

⁹ Uganda's electricity network reaches only 14.64% of the population in 2014, 4% more than in 2010 (energypedia.info)

annum)				
--------	--	--	--	--

Source: CIA World Fact Book

It is also particularly difficult to start a business in Uganda because the average lending rate is the highest of all the EAC partner states, with an average interest rate of over 20% per year.

For the tourism sector, the main impediments to investment and growth include (PSFU, 2010):

- An inadequate and uncompetitive infrastructure (rail, roads, waterways, air);
- Limited supply, reliability, and high cost of power;
- An increasing skills gap and low labour productivity;
- Limited access to affordable finance, the narrow scope of long-term financing, legal and regulatory barriers;
- A narrow tax base that imposes an immense burden on compliant tax payers and;
- Local private sector limitations to participating in public procurement markets.

Additionally, Entebbe Airport charges are higher compared to the neighbouring airports of Kenya and Tanzania. According to the PSFU, this factor is undoubtedly one of the main reasons for the low volume of air traffic at Entebbe.

Table 7: Airport charges for Uganda, Kenya and Tanzania in 2014

2014 - Airport	Landing (US\$/ton)	Example A320 - 73 tons (US\$)	Charge/user (\$US)
ENTEbbe (CAA)	6	443	60
DAR ES SALAAM (TAA)	5	365	40
JOMO KENYATTA – NAIROBI (KAA)	3	219	20 (2010)

Source: National aviation authorities of Kenya, Tanzania and Uganda

2.5 Summary of challenges and binding constraints for the tourism sector

Area	Issues, challenges & constraints
Tourism marketing and promotion	<ul style="list-style-type: none"> • Uganda's performance in the leisure and holiday segment from key markets in America and Europe is declining while that of regional players is rising. The majority of tourists (over 75%) are residents of East Africa who do not visit the protected areas and other tourist attraction sites. • Weak market segmentation and targeted destination marketing for both domestic and inbound markets. Efforts to promote domestic tourism are still ad hoc, without a comprehensive strategy. • Limited market research is being done. • Majority of local Tour operators lack liability insurance which is critical in securing transactions with the outbound tour operators in the source markets • Uganda's brand is not well established and positioned in the desired markets. The brand is weak and barely recognised • Inadequate supply of promotional materials at local governments and other MDAs resulting in very limited awareness of the potential that lies in tourism. • The online marketing strategy for the tourism sector is still weak. • Absence of a national crisis management strategy • Lean marketing team at UTB, limited in skill depth and human capital
Tourism product development	<ul style="list-style-type: none"> • Uganda receives 10 times fewer tourists per square kilometre in the protected areas compared to its major competitors in the region. • Wildlife stocks in most of the PAs are declining due to poaching, climate change effects, human-wildlife conflicts, massive invasion of alien species like Lantana which are not palatable to many wildlife species and does not provide conducive habitat for prey prone species. • The product range is very narrow largely concentrated on wildlife. Uganda's cultural and historical heritage resources are in a latent state while others are being destroyed. • Tourism on Uganda's large water bodies together with diverse avian life is still underdeveloped. This also applies to Uganda's entertainment sector. • Uganda's product is delivered by fragmented service providers who are inefficient and ineffective which ultimately makes the product expensive. • Limited government support for investment in the sector as there are no incentives for people interested in developing specific products • There are no realistic work plans and budgets for tourism product development at the local government level • The sector remains highly centralized, based in Kampala, limiting information sharing to other regions to facilitate opportunity recognition and product development • There is lack of a tourism investment fund specific for regions
Tourism human resource	<ul style="list-style-type: none"> • Low level of tourism skills throughout the national tourism value chain, at managerial, technical, operational and in key

development	<p>supporting functions both in government and private sector.</p> <ul style="list-style-type: none"> • There is limited knowledge of existing inventory of skills by value chain nodes as well as the skills requirements for each value chain actor in the industry. • The tourism sector is dominated by SMEs and family owned businesses employing unskilled family members at low pay thus compromising quality visitor experiences. • There is weak capacity in terms of instructional infrastructure, training manpower and the human capital of the trainers in the available tourism training institutions. • Working conditions are in general poor leading to high labor turn over in the sector. • There is limited investment in skills development of existing workforce in the private sector • Tourism education and training are fragmented across a multiplicity of stakeholders (Ministry of Tourism, Wildlife and antiquities, Ministry of Education and Sports, Ministry of Gender, Labour and Social Development, National Council of Higher Education, Uganda Tourism Board, Education and Training institutions, Tourism Industry Employers).
Tourism management and regulation	
<i>Tourism financing</i>	<ul style="list-style-type: none"> • There is gross underfunding of the tourism sector's core activities compared to the major competing countries as well as the sector's contribution to GDP. As a result of meagre government funding of the sector: <ul style="list-style-type: none"> ○ There is very minimal marketing of the destination ○ Tourism product development is limited ○ There is weak human capital development ○ Conservation efforts are undermined ○ The private sector has no access to affordable credit or subsidized financing, and thus is uncompetitive • The tourism levy which was established by the Tourism Act 2008 has not been implemented.
<i>Tourism statistics</i>	<ul style="list-style-type: none"> • There is absence of reliable, consistent and appropriate statistical information on the tourism sector in Uganda: <ul style="list-style-type: none"> ○ Limited data on the tourism markets which the country is targeting; ○ Lack of statistical significance of existing information and problems in data quality; ○ Inadequate detailed and robust information on the economic impacts of tourism; ○ Limited and unreliable information on tourism and tourism-related businesses; ○ Limited research studies in the sector • Weak enforcement of the regulation with regards to data provision by the tourism service providers
<i>Quality assurance</i>	<ul style="list-style-type: none"> • Weak enforcement of the regulations on quality of facilities in the sector. • Inadequate capacity, human and financial to enforce implementation of quality standards in the sector • Coordination for implementation of quality standards among the different stakeholders is inadequate • There is limited awareness on the quality guidelines and standards by both the public and private sectors.
<i>Coordination, governance and leadership</i>	<ul style="list-style-type: none"> • Tourism management and development is not yet adequately decentralized to the regions. • Tourism management responsibilities are dispersed across many government departments and agencies, leading to overlaps,

	<p>underutilisation of resources, and inefficiencies.</p> <ul style="list-style-type: none"> • Tourism resource management and prioritization at district level is influenced by the district councillors, who are not sensitive to tourism needs due to limited awareness and knowledge of tourism • District Commercial officers are inadequately facilitated to undertake tourism development activities
<i>Infrastructure development</i>	<ul style="list-style-type: none"> • Poor road access to and between some of the key tourist sites • Shortage of affordable quality accommodation capacity in and around National Parks • Inadequate supply of energy, water, ICT in key tourism sites • Lack of well-maintained airstrips close to the main National Parks • Lack of tourist stopover facilities • Single international air access route to destination Uganda (Entebbe) which is a risk to a flourishing industry
<i>Private sector development</i>	<ul style="list-style-type: none"> • There is inadequate private sector institutional and human resource capacity to initiate significant tourism development. • The private sector is fragmented and weak to effectively harness the available tourism potential • The tourism private sector, like in other sectors, is still bedevilled by limited access to affordable credit financing for investment. • Investors in the tourism sector lack adequate technical guidance on investment guidelines for facilities

3.0 Strategic objectives

The objectives to be achieved under this TSDP are outlined per area of strategic priority:

Priority Area One: Tourism marketing and promotion

Over the next five years, Uganda's main marketing objective will focus on core international, regional and domestic markets; and improving destination experience. The main focus will be on leisure and business segments, two markets that are most important to Uganda but where the country has consistently lost market share to the regional competitors. Leisure and business segments involve active choices that can be influenced through marketing, and have a higher economic impact on the economy. The core markets are Europe (UK and Germany) and North America (USA and Canada) because these markets generate the biggest volume of leisure and business tourists to Uganda. The East African region generates more than half of the tourists to Uganda, and segmenting it to target the leisure travellers also remains a priority for Uganda. Finally, the domestic market is a core segment which is growing exponentially and has ability to sustain the sector when there are contractions in the international and regional markets. See appendix 5 for detail on the chosen markets of focus.

Uganda should move to consolidate its position in the core markets. The core marketing objectives are to:

- *Undertake targeted marketing in the core markets and attain annual growth of 10% in arrivals of leisure and business tourists by 2019/20 in these markets.*
- *Develop the domestic market in Uganda by promoting events, festivals, day trips and weekend breaks.*
- *Promote and attain a 15% annual increase in regional leisure and MICE travellers to Uganda's key attraction sites and facilities by 2019/20.*

Priority Area Two: Tourism Human Resource Development

The diversity of tourism activities is indicative of the range of knowledge, skills, and attributes needed by tourism workers and employees of tourism-related industries, professions, and government agencies. The workforce and human resource development for the tourism industry is placed at the centre of this TSDP because competitiveness comes through the people who deliver the tourist services and products.

Tourism education and training shall not be built on the basis of a consultative model only but more on an engaged and participative stakeholder model, involving multi-ministry, industry associations, the private sector and international donor agencies. The approach will ensure partnership engagement in all facets of tourism education - policy, planning, resourcing, design and delivery - in order to meet industry and societal needs. There is also an urgent need to up-skill the officials in the various government agencies and institutions and to fulfil vacant posts. The core human resource development objectives are to:

- *Streamline tourism and hospitality training in Uganda to ensure an improvement in technical training contents and delivery.*
- *Enhance the capacity and skills of in-service personnel in the tourism and hospitality industry*
- *Increase demand for tourism-related job opportunities by highly skilled individuals*

Priority Area Three: Natural and Cultural Resource Conservation

Tourism development in Uganda can only be sustainable to the extent that the natural, historical and cultural heritage resources are conserved. These resources form the bedrock for the sector development and thus must be protected. However, given the current pressures from population growth, alternative economic activities, illicit trade, global warming and other exogenous factors, these resources are significantly affected. Over the next five years, effort will be made to ensure that ongoing efforts to conserve these resources are strengthened, building on partnerships, synergies and strategic alliances with key players. The two main objectives for natural and cultural resource conservation are to:

- *Strengthen the boundaries of protected areas and improve stakeholder engagement to reduce poaching, encroachment and environmental degradation in PAs*
- *Enhance Uganda's cultural heritage conservation and improve its contribution to tourism*

Priority Area Four: Tourism Management and Regulation

The tourism sector is multifaceted involving a number of actors that play different roles. This diversity calls for effective coordination, management and regulation in order to attain sustainability. Since there is a common vision for the sector, there is need for government, private sector and civil society associations to pay attention for regionalization of the sector development, establishment of an efficient tourism information management system, enforcement of quality standards, development of private sector capacity to become competitive, development of appropriate infrastructure and finding sustainable funding mechanisms for the sector. These are among others, the core areas of focus in this tourism sector development plan and the specific objectives are to:

- *Improve tourism sector coordination and management*
- *Develop a sustainable tourism development information management system*
- *Improve tourism and hospitality service delivery for industry competitiveness*
- *Improve tourism infrastructure (roads, air access, electricity, stopovers, water, internet [fiber cables and Wi-Fi blankets], and signage)*
- *Implement a sustainable source of funding for the tourism sector.*

Priority Area Five: Tourism Product Development

Products are the very basis for the existence of tourism and it is recognized that Uganda has a lot of potential for improvement, and development of new tourism products. A tourism product is typically an amalgam of many tourist experiences but in this plan, a product is limited to the things visitors to Uganda can see and do. The objectives of product development are to:

- *Upgrade and redevelop two existing tourism products to enhance tourist experience and economic impact*
- *Develop two new tourism products to enhance tourist experience and economic impact*

4.0 Implementation Framework

The implementation of this sector development plan will be through the existing institutional structures. The overall responsibility for its successful implementation rests with the Ministry of Tourism, Wildlife and Antiquities which provides oversight supervision, policy development and coordination of the sector. The different components of the plan fall within the specific and general mandates of the departments within the ministry as well as the affiliated agencies. Also the various core stakeholders at national and regional levels have been involved in the development of this plan, and should continuously be engaged to play their role in the plan. The agencies, departments and other major stakeholders have been consulted at every stage of developing this plan. Accordingly, activities that fall within the mandate of a given agency will be their direct responsibility; all marketing activities proposed in this plan are to be led by the Uganda Tourism Board, natural resource conservation by UWA and UWEC among others.

To effectively implement this plan, the Ministry will work through its top management committee which brings together all the accounting officers of the various departments and agencies under the ministry. The committee will be charged with ensuring that each actor plays their respective role, and this will be done through regular discussion of progress reports and work plans. Each of these actors will be required to develop a strategic plan and annual work plans that are in line with this plan. The annual budgets and activities of the agencies and departments will be tagged to this plan as a prerequisite for inclusion in the ministerial policy statements and budget for the sector.

Furthermore, civil society organisations and donor agencies that are to implement projects in the sector will all align their activities with this plan.

The Tourism Master Plan Coordination Committee will provide technical oversight and advisory roles to the stakeholders and the top management committee.

To ensure that tourism development cascades to the regions, regional tourism development offices will be established to coordinate tourism development at the local level. These offices will work with all the tourism stakeholders including local governments and clusters to ensure that the sector is well represented in the local government plans and activities of the clusters. These offices will provide the channel through which this plan will reach the grassroots.

It will also be important to build strong public-private partnerships because government alone cannot make every investment proposed in this plan. The investments which generate revenue will be left to the private sector and government role will focus on creating a conducive investment and operational environment for the investors. It is therefore important to strengthen the existing tourism associations to become a strong and equal partners in the implementation of the Plan.

5.0 Monitoring and Evaluation Framework

The overall responsibility for monitoring the implementation of this plan rests with the Ministry of Tourism, Wildlife and Antiquities. To effectively monitor the implementation of activities, a participatory

approach involving all key stakeholders will be adopted. The three major fora to be utilized are: the Top Management Committee at the Ministry of Tourism; the Tourism Sector Working Group; and Regional Tourism Sector Working Group through the tourism clusters. A dedicated budget will be established to facilitate these fora.

Top Management Committee at the Ministry of Tourism, Wildlife and Antiquities

This Committee already exists at the Ministry of Tourism and is composed of heads of the Ministry and its departments, agencies and a representative of the private sector. The Committee is chaired by the Minister of Tourism, Wildlife and Antiquities. The forum will receive, review and approve annual budgets of the MDAs before they are sent to parliament. Once compliance of the MDA annual work plans to this TSDP is attained, a Certificate of Compliance will be issued. The Committee will meet monthly to receive and assess performance monthly reports of the MDAs in regard to the TSDP and their annual work plans.

The Top Management Committee will receive, review and approve all tourism related development projects that are funded by the various development partners. Such projects should always indicate relevancy to the overall five year sector development plan before they are approved for implementation in Uganda.

Tourism Sector Working Group

A tourism sector working group has been re-established by the Ministry of Tourism bringing together all the major sector stakeholders to review the performance of the sector and identify emerging issues on a regular basis. This forum will be chaired by the Permanent Secretary MTWA, and members will include senior representatives of all government departments (including local government) involved in tourism development, regulation and training and related areas. Membership will also include key sector stakeholders from line ministries; the private sector and the development partners. These stakeholders will meet on a quarterly basis to review performance of this TSDP. Therefore, the office of the Permanent Secretary will establish direct communication channels with the actors to facilitate information sharing with the stakeholders. To the extent possible, social media platforms such as Facebook, Twitter and What'sApp should be taken advantage of.

Regional Tourism Sector Working Groups

Owing to inadequate presence of tourism in the regions, five regional tourism development offices will be established during the life of this plan. These offices will mobilize local communities to engage into tourism through use of the tourism development clusters which will bring together all actors from the entire sector value chain; representatives of local governments; and other stakeholders (faith-based, cultural, etc). Therefore, it will be important for the tourism development office to organize quarterly meetings where all these stakeholders meet to discuss progress in implementation of this plan in the region. The office will be empowered to deal with some issues at the local level, but for others of a significant nature, reference will be made to the relevant national office (ministry, UWA, UTB, UWEC, HTTI, etc). This office will be a channel through which information moves up to the top management forum and to the responsible actors.

Progress reporting, reviews and communication results

The Top Management Committee will report quarterly to the office of the Prime Minister on key expenditures, actions, outputs and progress towards outcomes envisioned in this TSDP.

Furthermore, the Ministry of Tourism will compile an annual performance report outlining its performance, the challenges and proposed mitigation measures in relation to this TSDP. This annual performance report will be submitted to the Office of the Prime Minister. The National Planning Authority will provide technical guidance on the structure and frame of the annual report.

Mid-term Evaluation

A mid-term review of the TSDP will be conducted in 2017/18 financial year to assess performance against the objectives and key outputs. The evaluation will be led by the National Planning Authority, and will make recommendations required to achieve the targets and objectives.

Final Evaluation

A final evaluation of this TSDP will be conducted in the last quarter of the planning period. The purpose of this evaluation will be to assess the overall effectiveness of the TSDP against its objectives as well as the objectives of the NDPII. This evaluation will highlight among the many issues important lessons learnt from implementing the plan as well as recommendations for the next planning phase for the sector.

Logical Framework

The primary tool to be used in the monitoring of the implementation of each of the five core priorities of this Plan is a logical framework. This tool will help to establish a logical hierarchy of means by which objectives will be attained; identify potential risks; establish how outputs and outcomes are best monitored and evaluated; present a summary of each priority intervention. The monitoring and evaluation framework to be used for this plan is in appendix 4.

6.0 Projected Investment and Plan Financing Mechanism

6.1 Basis of expenditure/investment projections

Projections for investment expenditure over the planned period was based on a number of factors namely; approved work plans and cost assessments by sector departments and agencies; discussions with accounting officers and technical staff of the MDAs; benchmarking with similar projects in the EAC and elsewhere; estimates from supplier proformas and quotations; discussions with existing investors in the sector and other private sector; anticipated sequencing of investment interventions over the planned period; and lastly provision for inflation and exchange rate variations over the plan period.

Sector agencies and departments provided already approved (by Parliament) work plans with cost estimates of a number of projects and activities to be implemented during the period 2015/16 – 2019/20. Other cost estimates were approved by the Boards of the respective agencies in both their work plans and strategic plans.

Approved cost assessments were received from MTWA, UTB, UWA, the Museum department as well as UIA that formed a basis for a number of projections in this plan. Discussions were also held with accounting officers and relevant technical staff of the ministry and its agencies. The cost information generated was further reinforced by soliciting cost estimates from private sector firms and government agencies dealing in provision of related services, works and goods. For specialized projects and activities

such as cultural centres/villages and protected areas fencing, cost estimates were obtained by benchmarking with similar projects in the EAC and elsewhere. Similarly, discussions were held with existing investors and the Uganda Tourism Think Tank to establish the cost of specific types of investments in and around attraction sites.

With regard to the spread of costs over the plan period, the major determinant was the anticipated sequencing of investment interventions based on existing work plans and detailed discussions with MDAs.

Lastly, based on macroeconomic targets and assumptions in the Budget Framework paper for 2013/14 – 2017/18 which projects both annual headline and core inflation to remain at an annual average of about 7% during the period, and due to the need to take care of the foreign exchange risk component associated with this plan, all cost projections were accordingly adjusted by a factor of 8% from 2015/16.

6.2 Basis of income/revenue projections to the Sector

Given that the Government of Uganda is the major contributor to investment in tourism development and that majority of the interventions still require significant public sector input, revenue estimates to finance the investments contained in this plan were based on the previous approved development expenditure budgets for 2012/13, 2013/14 and 2014/15 together with Medium Term Expenditure Framework (MTEF) development expenditure projections for 2015/16 – 2017/18. In addition to GoU development expenditure allocation, external financing projections in the MTEF projections up to 2018/19 have been used to estimate available public sector financing to support investment activities in the sector.

Approved and projected MTEF Development Expenditure (billion shillings)

Institution	Approved 2012/13	Approved 2013/14	Approved 2014/15	Projected 2015/16	Projected FY 2016/17	Projected 2017/18	Projected 2018/19	Projected 2019/20
Ministry of Tourism Wildlife and Antiquities	2.2	3.0	3.5	8.8	8.8	9.6	13.6	19.4
Uganda Wildlife Authority	9.0	10.0	22.0	3.0	5.0	6.0	7.6	9.5
Uganda Tourism Board	0.0	0.0	0.5	0.6	1.0	1.0	1.3	1.7
Uganda Wildlife Education Centre	0.7	0.7	0.5	0.5	0.4	0.3	0.3	0.2
Hotel and Tourism Training Institute	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Uganda Wildlife Training Institute	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total GoU Development Expenditure	11.9	13.6	26.6	12.9	15.2	16.9	22.8	30.8
External financing		3.091	0.724	0.000	0.000	0.000	0.000	0.000
Total Available public sector financing	11.9	16.691	27.324	12.9	15.2	16.9	22.8	30.8

Source: Budget Framework Paper, 2013/14 – 2017/18 and Forecasts for 2018/19 – 2019/20

The MTEF projections of development allocation available to the sector MDAs show an overall increase in trend from 2015/16-2019/20 of an annual average of 19.7%. However, the largest proportion of this is for MTWA and UWA responsible for policy and sector supervision and coordination as well as conservation respectively with the other agencies responsible for marketing and product development, and human resource development projected to get almost no development allocation between 2015/16 –

2019/20. The MTEF projections also show no external financing expected for the sector during the same period.

With regard to private sector financing of planned interventions, a PPP approach where the private sector contributes to planned activities and investment is expected mainly in human resource development (HRD), product development, tourism marketing and promotion and cultural heritage conservation. In addition, for areas where significant FDI is expected to implement relevant activities but where initial public expenditure is required to develop master plans, no provision has been made for private sector investment in the current estimates.

6.3 Projected Financing Gap 2015/16 – 2019/20

According to the Budget Framework Paper for the period 2013/14 – 2017/18, external resources in the medium term for tourism, trade and industry are USD 3.2 million in 2014/15, USD 1.43 million in 2015/16 while the period 2016/17 to 2018/19 has no committed support. Overall, this expenditure represents less than 0.33% of the overall external resource support to all sectors.

The overview of sector expenditure according to MTEF budget projections for development (excluding recurrent expenditure) is as follows:

Projected financing gap for the Tourism Sector Development Plan (UGX billion)

	2015/16	2016/17	2017/18	2018/19	2019/20
Projected GoU allocation to the Sector	12.9	15.2	16.9	22.8	30.8
Projected external financing	27	27	21	0	0
Total projected public sector financing	39.9	42.2	37.9	22.8	30.8
TSDP Public sector investment requirement	47.1	83.2	77.6	54.9	45.7
Public Sector Financing Gap	7.2	41	39.7	32.1	14.9

Based on the current MTEF estimates which are projected to the year 2019/20, the total financing gap of this plan is UGX134.9 billion. The financing gap is projected at UGX7.2 billion in 2015/16, UGX41 billion in 2016/17, UGX39.7 billion in 2017/18, UGX32.1 billion in 2018/19 and UGX14.9 billion in 2019/20.

The above relate to public sector investment projections and exclude private sector investment interventions required to realise the plan objectives by 2019/20. The private sector investment interventions expected in tourism marketing and promotion, tourism human resource development, tourism product development, tourism management and regulation will be financed from private capital sources or through support from development partners. Total private sector investment required to achieve plan objectives is summarized in the table below:

Projected private sector investment 2015/16 – 2019/20

Priority Area	2015/16	2016/17	2017/18	2018/19	2019/20	Total
Tourism Marketing And Promotion	839,741	956,920	1,119,010	1,208,531	1,305,213	5,429,416
Tourism Human Resource Development	89,900	147,092	238,859	329,648	356,020	1,161,519
Tourism Management and Regulation	200,000	216,000	233,280	251,942	272,098	1,173,320
Tourism Product Development	-	5,141,347	10,522,654	5,652,867	50,000	21,366,868
Grand Total (US\$)	1,129,641	6,461,359	12,113,804	7,442,988	1,983,331	29,131,124
Grand Total (UGX)	3,388,923,600	19,384,078,488	36,341,411,687	22,328,964,622	5,949,993,515	87,393,371,912

6.4 Plan Financing Mechanisms

In discussing the plan financing mechanisms it is important first and foremost to recognize the tourism sector's direct contribution to Uganda's economy as projected by the UNWTO. Based on the income contribution from leisure and business visitors alone which is expected to grow from US\$466 billion in 2014 to US\$876 billion in 2020, and a total income contribution of US\$3.4 billion over the plan period, the sector is expected to be a major contributor to GDP, foreign exchange, employment growth, government revenue as well as poverty reduction. The sector is therefore expected to generate a higher rate of return on investment with planned investments undertaken to grow Leisure and MICE tourism which are the main focus of the plan. It is therefore imperative that GoU allocation to development expenditure within the MTEF is increased substantially as a significant first step to finance the Tourism Sector Development Plan because of the sector's current and projected contribution to the economy.

Therefore, in order to effectively finance planned investments in the sector, and because of the short time available, the MTEF ceiling for 2015/16 needs to be increased by UGX3.66billion and the same amount be raised through external financing as preparations are made to implement the tourism development levy in 2016/17. It will be necessary to raise an additional UGX3.15billion in 2016/17 and UGX0.425 billion in 2017/18 from external financing sources to supplement GoU allocations. As shown in the table below, additional MTEF allocations are expected to continue and end in 2017/18. The main source of financing the plan is expected to be the Tourism Development Levy which should be implemented in 2016/17 and will cover 100% financing of the public sector investment expenditure by 2019/20.

Proposed Plan Financing Mechanism (UGX billion)

	2015/16	2016/17	2017/18	2018/19	2019/20
Projected GoU allocation to the Sector	12.9	15.2	16.9	22.8	30.8
Projected external financing	27	27	21	0	0
Total projected public sector financing	39.9	42.2	37.9	22.8	30.8
TSDP Public sector investment requirement	47.1	83.2	77.6	54.9	45.7
Public Sector Financing Gap	7.2	41	39.7	32.1	14.9
<i>Proposed MTEF adjustment (additional GoU allocation)</i>	<i>3.6</i>	<i>9.35</i>	<i>9.35</i>	<i>0.68</i>	<i>-18.09</i>
<i>Proposed external financing mobilization</i>	<i>3.6</i>	<i>3.15</i>	<i>0.425</i>	<i>0.00</i>	<i>0.00</i>
<i>Revenue contribution from Tourism Development Levy (TDL)</i>	<i>0</i>	<i>28.5</i>	<i>29.925</i>	<i>31.42</i>	<i>32.99</i>

6.5 Summary of Total Investment Costs Annualised (US\$)

Activity	2015/16	2016/17	2017/18	2018/19	2019/20	Total
Public Sector Investment						
Marketing and promotion	3,590,563	3,911,728	3,675,770	3,915,832	4,229,098	19,322,991
Human Resource Development	4,230,100	4,479,308	4,282,773	136,914	147,868	13,276,963
Tourism Management and Regulation	416,667	9,351,950	8,761,296	6,102,692	809,307	25,441,912
Natural and cultural heritage conservation	5,031,325	5,474,097	5,178,688	5,419,823	5,683,017	26,786,951
Product Development	1,000,000	2,008,333	1,621,333	1,048,320	2,976,667	8,654,654
Sub-Total	14,268,654	25,225,416	23,519,860	16,623,581	13,845,957	93,483,470
Monitoring and supervision (10%)	1,426,865	2,522,542	2,351,986	1,662,358	1,384,596	9,348,347
Total Public Sector Investment	15,695,520	27,747,958	25,871,846	18,285,940	15,230,553	102,831,817
Private Sector Investment						
Marketing and promotion	839,741	956,920	1,119,010	1,208,531	1,305,213	5,429,416
Human Resource Development	89,900	147,092	238,859	329,648	356,020	1,161,519
Tourism Management and Regulation	200,000	216,000	233,280	251,942	272,098	1,173,320
Product Development	-	5,141,347	10,522,654	5,652,867	50,000	21,366,868
Total Private Sector Investment	1,129,641	6,461,359	12,113,804	7,442,988	1,983,331	29,131,124
Grand Total (US\$)	11,655,161	29,039,317	33,585,650	25,728,928	17,213,884	117,222,941
Grand Total (UGX)	34,965,483,000	87,117,951,000	100,756,950,000	77,186,784,000	51,641,652,000	351,668,823,000

Note: US\$1 costs UGX3,000

The detailed budget with budgeting assumptions is in appendix 3.

7.0 Critical Success Factors

The success for implementation of this plan will depend on the following critical factors:

- Strong top management commitment in all the core MDAs (MTWA, UTB, UWA, HTTI, UWEC, UWTI) and the private sector. This commitment will translate into realignment of activities to this plan, resource allocation and therefore its follow-up and implementation.

-
- Strengthening the Top Management Coordination Committee to take charge and oversee the implementation of this Sector Development Plan.
 - Sufficient resources, financial, human and others necessary to achieve the objectives set out in this plan. Although the expected impact of this plan is significant, the financial resources it requires annually are estimated at less than 4% of the overall contribution of the tourism sector to Uganda's GDP.
 - Strong political will and commitment to transparency, accountability and results. This will be reflected in budgetary allocations to the sector as well as support for tourism development across all levels of Uganda's political spectrum.

Bibliography

Association of Uganda Tour Operators. (2014). Proposal to Government of Uganda for Provision of Credit Line to Purchase Professional Tour Vehicles . Kampala: AUTO.

Civil Aviation Authority of Uganda (2012) Aeronautical charges schedule effective January 2012

Enterprise Uganda. (2012). Capacity assessment of selected tourism support institutions in Uganda. Kampala: UNDP.

Government of Uganda (2010) Uganda vision 2040: A transformed Ugandan society from a peasant to a modern and prosperous country within 30 years

IFC (2010) Kenya's tourism: polishing the jewel. Finance and private sector development - Africa Region.

IFC (2012) Doing Business 2013 – Economy profile Uganda

Integrated Framework for Trade-related Technical Assistance to least developed countries (2006), Uganda Diagnostic Trade Integration Study, volume 1&2.

Kamuntu E. (2011) Press Briefing on Foreign Direct Investment projected to increase in 2011

Kaosa-ard M. and Unthong A. (2005), Tourism competitiveness in the Greater Mekong Sub-region, Prepared for EuroCHRIE conference, Paris, France.

Mariki S., Hassan S., Maganga S., Modest R. Salehe F. (2011) Wildlife based domestic tourism in Tanzania: Experiences from Northern Tourist circuit, Ethiopian journal of environmental studies and management. Vol. 4 N. 4, 62-73.

Ministry of Finance, Planning and Economic Development (2012), Report on Uganda business licensing reforms vol. 1.

Ministry of Tourism, Trade and Industry. (n.d.). Strategic Investment Plan 2009/10 -2013/14. Kampala.

Ministry of Tourism, Wildlife and Antiquities. (2014). The Integrated Uganda Tourism Master Plan 2014 - 2024 (Draft). Kampala: MTWA.

Ministry of Tourism, Wildlife and Heritage (2012) Annual Performance Report 2011/2012

Ministry of Tourism, Wildlife and Heritage (2012) Sector statistical report.

Moyini K. and Uwimbabazi B. (undated) analysis of the economic significance of Gorilla tourism in Uganda, International conservation Gorilla Program.

Mwaura F. and Ssetikoleko S. (2011) Reviewing Uganda's tourism sector for economic and social upgrading, Capturing the gains.

National Planning Authority. (2010). National Development Plan. Kampala, Uganda.

National Planning Authority. (2013). Uganda Vision 2040. Kampala: The Republic of Uganda.

Neuburger M. and Steinicke E. (2012) Alpine tourism in tropical Africa and sustainable development: Uganda Rwenzori and Mt Kenya as case studies, Journal of sustainable education vol 3

Office of the Auditor General (2011) Annual report of the Auditor General for the year ended 30th June 2010.

Plumptre A. and Roberts C. (2006) Attractions of Queen Elisabeth National Park” Perception about development of a golf course, Wildlife Conservation Society.

Private Sector Platform for Action (2010), A synopsis of key private sector growth challenges and proposals for policy reforms

Sidinga I. (1995) Wildlife based tourism in Kenya : Land use conflicts and government compensation policies over protected areas, the journal of tourism studies, vol. 6, #2. 45-55.

The Republic of Uganda. (2008). The Uganda Tourism Act, 2008. Kampala.

Uganda Bureau of Statistics (2005 - 2012) Statistical Abstracts

Uganda Tourism Board. (2012). Exploratory Study on the Introduction of Tourism Development Levy in Uganda, Final Draft. Kampala: UTB.

Uganda Tourism Board. (2012). Strategic Plan 2012/13 - 2015/16. Kampala: UTB.

Uganda Tourism Board. (2013). ITB Berlin Research Report. Kampala: UTB.

Uganda Wildlife Authority (2000-2012), Annual review reports

Uganda Wildlife Authority (2012) UWA’s financial performance

United Nations Development Programme. (2013). Uganda Domestic Tourism Study. Kampala: UNDP.

United Nations World Tourism Organisation. (2012). Situational Assessment of the Economics of Tourism in the Republic of Uganda. Kampala: UNWTO.

United Nations World Tourism Organisation. (2012). Tourism Highlights. UNWTO.

World Bank. (2012). Uganda Tourism Sector Situation Assessment: Tourism Reawakening . World Bank.

World Bank. (2013). Economic and Statistical Analysis of Tourism in Uganda, Final Draft. World Bank.

World Economic forum (2011-2013) Tourism competitiveness index reports.

World Travel and Tourism Council . (2013). The Travel & Tourism Competitiveness Report: Reducing Barriers to Economic Growth and Job Creation. Geneva: World Economic Forum.

World Wide Fund for Nature. (n.d.). Environmental problems in Uganda. Retrieved October 7, 2014, from http://wwf.panda.org/who_we_are/wwf_offices/uganda/problems_uganda/

Appendix 1: Strategic Actions and Expected Outcomes

Marketing Strategies, Activities and Expected Outcomes

Objective	Strategy	Activities	Expected outcome
<p>To undertake targeted marketing in the core markets and attain annual growth of 10% in arrivals of leisure and business tourists by 2019/20 in these markets.</p>	<ul style="list-style-type: none"> • Engage reputable PR or Advertising agencies to represent Uganda on fulltime basis in the identified core markets. • Undertake systematic market research in international markets to gain deeper understanding of the key variables such as demographics, motivations, tastes and preferences, travel patterns, buying patterns, expenditure patterns to form the basis for market segmentation and PR firm engagement 	<ul style="list-style-type: none"> • Advertise, select and recruit PR/advertising agencies in the UK, Germany, USA and China • Improve access to liability insurance cover among local tour operators to be able to provide confidence in the outbound tour operators and clients • Actively participate in tourism trade fairs, with technical support from the PR/advertising agencies, also focusing on pre-fair activities such as road shows, media presentations, etc • Develop a Uganda Tourism Brand and undertake brand management. • Engage and promote Uganda's tourism among the diaspora through among other activities organizing and celebrating the Pearl of Africa days in various cities across the source markets • Set up a Marketing Advisory Committee to monitor, advise and coordinate marketing activities of UTB, bearing in mind regional representation, key actors and their roles in the sector • Organize FAM trips inviting the most influential journalists and the tour operators that are most likely to feature Uganda in their portfolio of packages, and targeting high impact operators/journalists with clear terms of engagement • Complete the development of the Uganda Tourism Portal with all relevant links and regularly updated. • Develop marketing collaterals (in English, German, Chinese, Russian, French and Latin), a Sales Manual and a Media Kit and distribute these widely to selected travel stakeholders. • Undertake regular market research in key source markets. • Strengthen partnership with faith-based institutions to promote faith-based tourism 	<ul style="list-style-type: none"> • Annual growth of 10% in arrivals of leisure and business tourists by 2019/20 from the UK, Germany, USA, Canada and South Africa. • A fully up to date and functional tourism portal for Uganda • Improved service standards in the tourism sector • Fully developed niche tourism products with fair regional representation

	Constitute a crisis management team and empower it to undertake crisis management activities to counteract negative publicity.	<ul style="list-style-type: none"> • Develop a robust crisis management strategy and implement it • Facilitate training from UNWTO on crisis management, taking advantage of Uganda’s membership to the organization and standard training approaches used by UNWTO. 	<ul style="list-style-type: none"> • Improved Ugandan image even in the wake of emerging crises defined by number of tourist cancellations.
To develop the domestic market in Uganda by promoting events, festivals, day trips and weekend breaks.	<ul style="list-style-type: none"> • Undertake an aggressive media campaign; take key role in organizing events, festivals and domestic tourism products. • Build capacity of UTB marketing team to undertake marketing activities, and establish at least five regional tourism development offices (east, north, central, west and southwest) for information collection, dissemination, quality assurance, cluster development, product development and marketing 	<ul style="list-style-type: none"> • Develop guidelines for creation of tourism clusters and provide both technical and financial support for establishment of tourism clusters in the regions • Develop and implement a calendar of Events and Festivals. • Undertake advertising using web-based platforms (social media, websites and blogs) but also tourism promotions prior to major events in local media (TV, radio, newspapers and magazines) as well as outdoor advertising. • Organise an annual international tourism trade fair in Uganda. • Organise domestic FAM trips with the media to encourage coverage in the electronic media and articles in the published press. • Set up desks or stalls at events that the targeted domestic market segments attend to distribute information and promote events and packages. • Undertake school outreach programs in each of the regions of Uganda to create awareness on the importance of tourism, and trigger formation of school tourism clubs and school tourism trips. • Initiate tourism marketing partnerships with local corporate enterprises to promote the tourism potential of Uganda • Promote investment in mid-range B&B accommodation in Protected areas 	<p>Increase in volume of domestic tourists to protected areas, events, festivals and marine activities directly attributable to UTB efforts</p> <p>Fully functional and active regional tourism clusters developed and supported by UTB</p>
Promote and attain a 15% annual increase in regional leisure and MICE travellers to Uganda’s key attraction sites and facilities by 2019/20.	Strengthen the EAC tourism development partnership initiatives, and aggressively promote Uganda in the region as a viable destination for leisure and MICE visitors.	<ul style="list-style-type: none"> • Undertake promotion of events and festivals of a regional nature, working with stakeholders that already organize these festivals • Create a MICE Bureau in Uganda • Participate in regional tourism trade fairs 	15% annual increase in regional leisure and MICE travellers to Uganda’s key attraction sites and facilities

Human Resource Development Strategies, Activities and Expected Outcomes

Objective	Strategy	Activities	Expected outcome
Streamline tourism and hospitality training in Uganda	<p>Harmonise tourism and hospitality training curriculum in the tertiary training institutions</p> <p>Certify on-job/learning by doing based trainings</p> <p>Strengthen HTTI</p>	<ul style="list-style-type: none"> • Collect, review and improve/harmonise training contents of tourism and hospitality training curriculums of all recognised training institutions at certificate, diploma and degree levels. • Create the Uganda Institute of Certified Tourism and Hospitality Professionals to certify curriculums and practitioners; standardize and harmonise training; ensure quality assurance; and enforce professional ethics • Create on-the-job training modules certified to national accreditation standards • Upgrade the training facilities and institutional capacity of HTTI 	<p>Improved certification system, management and control</p> <p>Appropriate tourism curriculums</p> <p>Increased number and quality of accredited tourism trainings</p> <p>Upgraded HTTI able to produce manpower that meets the industry needs</p>
Enhance the capacity and skills of in-service personnel in the tourism and hospitality industry	Use a cascading model to create a pool of TOTs, and develop tailor-made training courses for the tourism private sector.	<ul style="list-style-type: none"> • Undertake a Training needs assessment in the private sector, taking a value chain approach • Create a critical mass of TOTs to run the tailor-made trainings, coordinated by HTTI • Deliver on-job trainings to the stakeholders to address the identified training needs • Facilitation of internships of students from training institutions • Undertake an HR audit in the ministries, departments and agencies • Undertake “upskilling” of the workforce of both the MoTWA and the National Council for Higher Education (NCHE) to enforce compulsory accreditation and compliance to training standards. 	<p>80 operational TOTs</p> <p>Increased quality of services and products</p> <p>Improved capacity of government officials</p> <p>Acceleration of programs’ implementation</p>
Increase demand for tourism-related job opportunities by highly skilled individuals	<p>Up skilling of the staff in the tourism public sector, including local governments</p> <p>Enhance public awareness and encourage participation in tourism industry</p>	<ul style="list-style-type: none"> • Support long-serving incentive scheme in the sector on PPP arrangement as part of the Pearl of Africa tourism day celebrations • Run a national career awareness drive to enhance the interest in tourism • Generate market exposure for “real” Ugandan Structures (Travel magazine, websites, etc.) 	<p>Enhanced interest in tourism job opportunities</p> <p>Increased awareness in the value of cultural and natural heritage</p>

	Overcome the reservations towards tourism employment by addressing (mis-)perceptions and social/cultural reservations.		Increased number of “pro-tourism activities, events and publications”
--	--	--	---

Natural and Cultural Heritage Conservation Strategies, Activities and Expected Outcomes

Objective	Strategy	Activities	Expected outcome
<i>Strengthen the boundaries of protected areas and improve stakeholder engagement to reduce poaching, encroachment and environmental degradation in PAs</i>	<ul style="list-style-type: none"> Secure the integrity of the protected areas boundaries Improve livelihoods of local communities Address human-wildlife conflicts Restore and maintain healthy Ecosystems 	<ul style="list-style-type: none"> Fence off (electric and live fences) two of the most affected protected areas to control problem animals (QENP and MFNP). Plant boundary marking trees (preferably Eucalyptus) separating PAs and community areas to mark PA boundaries in areas where fencing is not possible or too costly. Redirect utilization of the 20% to directly fund activities in the enterprises that mitigate human wildlife conflicts Build the capacity of local communities through forming CBOs to better receive and manage funding Facilitate and build capacity of communities to start and manage conservation enterprises linked to tourism and other high value crops that mitigate human-wildlife conflicts (e.g tea, pepper, apiculture, etc) Engage with, and build capacity of local governments to protect and conserve historical and cultural heritage resources within their jurisdictions. Finalize amendment of Wildlife Act and enact policies that are fair to allow for community 	<ul style="list-style-type: none"> Human wildlife conflicts reduced and protected areas’ boundaries secured Conservation enterprises managed by local people increased Improved capacities of local communities to access source of funding and to responsibly cope with a changing environment Endorsed policies and sub-decrees aiming to help mitigating human-wildlife conflicts Increased concern on community’s participation in wildlife preservation

		<ul style="list-style-type: none"> compensation in case of • Manage Areas within protected areas that are covered by invasive/ exotic species • Reduce wildlife disease prevalence and contain epidemics in all PAs • Contain illegal activities in all wildlife areas • Minimize negative impacts of oil and gas, hydro power, mining, tourism facilities. • Initiate joint efforts to offer veterinary support outside the PAs. • Undertake Research and Ecological Monitoring in protected areas • Finalise amendment of Wildlife Act and enact policies that are fair to allow for community compensation in case of loss of life and property • Undertake rolling out and implementation of the cashless smart card system in the protected areas. 	<ul style="list-style-type: none"> • Fair Community compensation arrangements rolled out • -Invasive species in PAs eliminated • Increase in species population due to reduction in illegal activities and mortalities • Availability of timely, sufficient and updated wildlife and ecosystem data in Uganda • Fully operational cashless system at protected areas entry points.
	Safeguarding historical and cultural heritage through tourism	<ul style="list-style-type: none"> • Profile and map existing and potential cultural and historical heritage resources in Uganda • Engage with, and build capacity of local governments to protect and conserve historical and cultural heritage resources within their jurisdictions for socio-economic purposes. 	<ul style="list-style-type: none"> • A detailed report and map of existing and potential cultural and historical heritage resources in Uganda. • Historical and cultural heritage resources in districts identified and protected
Objective 2: Enhance Uganda’s cultural heritage conservation and improve its contribution to tourism		<ul style="list-style-type: none"> • Undertake modernization of the National Museum in Kampala 	Modern Uganda National Museum
		<ul style="list-style-type: none"> • Establish 3 Regional Museums (Mbarara, Fort Portal and Arua) 	Increased conservation of cultural resources in the

			regional museums
		<ul style="list-style-type: none"> • Develop 8 Heritage Sites in in Eastern, Central, Western and Northern Uganda regions, and have them gazetted as UNESCO world heritage sites. 	Improved cultural heritage sites on the tentative list of UNESCO world heritage sites

Tourism Management and Regulation Strategies, Activities and Expected Outcomes

Objective	Strategy	Activities	Expected outcome
Improve tourism sector coordination and management	Adopt the best option for coordinating and managing the tourism sector	<ul style="list-style-type: none"> • Undertake a feasibility study on the options for managing and coordinating the tourism MDAs • Implement the recommendations of the tourism sector coordination and management feasibility study. 	Improved utilization of tourism sector resources
Regionalize tourism development, promotion and management	Establish at least five regional tourism development offices (east, north, central, west and southwest) for information collection dissemination, quality assurance, cluster development, product development and marketing	<ul style="list-style-type: none"> • Engage concerned stakeholders to provide office space for establishment of the regional tourism offices • Furnishing and equipping regional tourism development offices. • Support quarterly regional tourism forums coordinated by the regional tourism offices and the tourism the clusters. 	5 established regional tourism development offices
Establish a sustainable tourism development observatory for regular, reliable and consistent tourism data collection, analysis, and dissemination to stakeholders	Partner with reputable research institutions to build capacity and undertake demand driven tourism research studies	<ul style="list-style-type: none"> • Set up a tourism observatory at the reputable research institution to collect and disseminate tourism information on a regular basis. • Build the capacity of tourism stakeholders to capture and manage tourism related data. • Develop a sustainability plan for the tourism observatory • Conduct quarterly surveys to collect data for three years to establish a reliable database to act as a building block for future national tourism data collection and management. 	Tourism information updated and disseminated on a regular basis
Improve tourism and hospitality service delivery for industry competitiveness	<ol style="list-style-type: none"> 1. Strengthen quality assurance and standards for tourism facilities 2. Strengthen the private sector umbrella association by partly supporting to implement its strategic plan 	<ul style="list-style-type: none"> • Undertake classification, certification and licensing of tourism facilities and operators along the entire value chain • Undertake training of one additional cohort of 50 assessors • Undertake awareness and sensitization campaigns for standards and certification to enhance compliance • Build capacity in local authorities to enforce quality assurance • Facilitate formation and development of tourism clusters. • Facilitate the setting up of a fully-fledged UTA 	<p>Pro-active private sector umbrella association able to build capacity of its members</p> <p>Improved capacity to evaluate and to reach high quality standards</p> <p>Improved working conditions in</p>

		<p>secretariat to handle all technical and administrative activities of the association to be able to implement its strategic plan</p> <ul style="list-style-type: none"> Facilitate the setting up of a fully-fledged UTA secretariat to handle all technical and administrative activities of the association to be able to implement its strategic plan 	tourism and tourism related activities
<p>Improve tourism infrastructure (roads, air access, electricity, stopovers, water, internet [fiber cables and Wi-Fi blankets], and signage)</p>	<p>Lobby and advocate for infrastructure development in sector, ensuring that the line MDAs prioritise tourism infrastructure in their plans and activities</p> <p>Work on the roads and airstrips within the protected areas</p>	<ul style="list-style-type: none"> Liaise with relevant MDAs to prioritise/include tourism roads, and provide tourism support infrastructure in key tourism zones Undertake feasibility study for reintroduction of the Uganda airlines carrier Establish fiber cables; Wifi infrastructure (e.g. fiber cables and wifi blankets) in strategic tourist areas Resurface and maintain four airstrips at Pakuba, Chobe, Kidepo, Kasese. Install security screening machines at airstrips to enhance security of travelers. 	Improved access to tourism attractions and facilities
<p>Implement a sustainable source of funding for the tourism sector.</p>	<p>Adopt the recommendations of the feasibility study on the introduction of the tourism development levy in Uganda</p>	<ul style="list-style-type: none"> Undertake tourism levy implementation by the Uganda Revenue Authority to generate estimated US\$9.5 million per year in additional revenue for the sector in 2016/17. Secure a credit line to avail low cost financing to the tourism private sector to facilitate acquisition of specialized tourist transport vehicles. 	<p>Increased financial resources for sustainable development of tourism in Uganda</p> <p>Enhanced ability to meet budget requirements of the sector MDAs</p>

Appendix 2: Detailed Product Descriptions

Product one: Upgrading and Redeveloping the Source of the Nile

Product Name	Upgrade and redevelop the Source of the Nile site into a world-class visitor attraction
Product description	To effectively cover the Source of the Nile and its environs, the project proposes that the Source of the Nile development area is extended from the Jinja Wildlife Sanctuary area to include present Njeru Town Council, the area between the River Nile and the Kayunga and Bujagali roads up to the Itanda Falls and with supportive investments around Jinja Municipality
Objectives of the product	<p>To re-design and develop the Jinja source of the Nile into a modern attraction site with potential to spur employment, foreign exchange earnings and local area investment.</p> <p>To use the developed source of the Nile to direct tourist traffic further east by igniting development of new cultural, natural and historical heritage products.</p>
Benefit to the tourists/expected tourist experience	Redeveloping the source of the Nile will provide a visitor with more activities, experiences and attractions to enjoy thereby justifying the visit, referrals and instilling a sense of value for money. The proposed redevelopment will enhance conservation of the site and thus ensure enjoyment of the site to future visitors.
Sustainability of the product	<p>Stakeholder capacity to manage the site should be built right from the start through active involvement and participation in planning, development, management of the site, and revenue sharing. Proper dialogue mechanisms and regulations for site management should be designed and enforced to ensure that all actors are bound to promote conservation of the site. The overall policy direction and support of the Ministry of Tourism, Wildlife and Antiquities should lay the ground for utilizing the site on a going concern basis.</p> <p>A wide array of activities and experiences will increase visitor stay and expenditure, thus generating revenue to all concerned stakeholders in the value chain.</p>
Required activities to develop the product	<ul style="list-style-type: none"> • Develop a physical development Master plan for the Source of the Nile • Prepare bankable project profiles for the different investment projects at the Source of the Nile

	<ul style="list-style-type: none"> • Construct a modern information and interpretation center with adequate and well maintained public utilities • Improve informational and directional signage to the Source of the Nile • Build partnerships with the private sector to upgrade and set up quality restaurant and catering facilities at the site • Create a reliable pool of divers and tour guides to provide rescue and quality tour guiding services at the Source of the Nile.
Stakeholder roles	<p><u>Ministry of Tourism, Wildlife and Antiquities</u></p> <ul style="list-style-type: none"> • Provide policy oversight and supervision for all developments at the site • Undertake the feasibility study and development of the physical plan for the source of the Nile development • Coordination of site development activities, including participating in the evaluation and monitoring of developers at the site • Undertake lobbying and advocacy activities at the highest political level in the country <p><u>Uganda Tourism Board</u></p> <ul style="list-style-type: none"> • Lead development of the various products at the site • Marketing and promotion of the source of the Nile and Eastern Uganda tourism products in general. • Enforcement of quality assurance standards for all operators and facilities at the site • Provide awareness campaigns, local capacity building and development of the Busoga Tourism Cluster to harness the benefits accruing from the tourism industry <p><u>Ministry of Environment</u></p> <ul style="list-style-type: none"> • Provide access to the land reserves on the banks of the River to allow for sustainable tourism development • Jointly work with other stakeholders to develop guidelines for sustainable use of the marine and natural resources on the Nile and its catchment areas • Enforce adherence to environmental requirements at the source of Nile <p><u>Private Sector Tourism Associations</u></p> <ul style="list-style-type: none"> • Mobilize members to promote, market and sell the newly developed tourism products at the source of the Nile and beyond

	<ul style="list-style-type: none"> • Undertake investments business enterprises • Liaise with the UTB and other actors to undertake training of the private sector members to adopt best business practices and ensure effective service delivery • Work closely with government to enforce standards and regulation of activities at the source of the Nile <p><u>Local governments</u></p> <ul style="list-style-type: none"> • Provide land for establishment of common interest facilities, as well as investment zones • Mobilise and support the local people to fully participate in tourism in the area as operators, employees, investors, etc • Provide technical and facilitative support to the other actors to fully monitor, supervise and enforce standards for developers and operators at the site • <u>Other line institutions</u> <p>Construct and renovate the necessary infrastructure to improve access to the Source of the Nile</p>
Promotion and marketing of the product	<ul style="list-style-type: none"> • Produce marketing and promotional collaterals and distribute these widely to stakeholders • Produce videos and documentation of the attractions and activities at the site, including operating a full tourism database accessible to visitors and all stakeholders in the sector • Embrace the Source of the Nile into all the marketing activities of Uganda. • Deliver excellent services to spur word of mouth promotion and promotion
Expected benefits	<ul style="list-style-type: none"> • Thousands of jobs at local and national level • Widespread income opportunities across the entire value chain of the product • Environmental and cultural heritage conservation • Increased income to both local and national level governments in form of taxes • High potential for both rural and urban poverty alleviation • Support for development of auxiliary services and sectors such as

	healthcare, banking, insurance, agriculture, construction, manufacturing, trade and commerce, etc
--	--

Product Two: Develop, Brand and Promote the Rwenzori Mountains

Product name	Develop, brand and promote the Rwenzori Mountains as an attractive tourism product
Product description	<p>Rwenzori Mountains (Mountains of the Moon) is a global biodiversity hotspot, providing key ecosystem services- carbon storage, forest resources and water supply. It is the largest mountain range in Africa (120km long /65Km wide) with an altitude range of 1600m to 5109m above Sea Level making it the highest Mountain in Uganda and third in Africa. The highest point (Magharita peak) stands at 5109 meters above sea level. Other Rwenzori ranges with peaks of great significance include; Speke (4890m), Baker (4843m), Gess (4715m), Emin (4797m), Luigi de Savio (4627m) and Alexandria (5,083m). These mountain ranges are unique for they are not volcanic but do rise directly from the rift valley floor.</p> <p>The mountain, gazzeted as a national park is home to diverse vegetation (over 994 recorded plant species); diverse fauna (African elephants, Chimpanzees, Red fronted duikers, Rock hyrax, Rwenzori Leopard, Tree squirrels, over 217 recorded bird species- 17 of which are endemic to the park). The fauna and flora richness, scenic beauty, Glacier lakes, rivers and waterfalls, diverse rock types and snow-capped peaks give the park a unique geographical heritage and biodiversity importance which enabled its declaration into a World Heritage Site (WHS) and an Important Bird Area (IBA). In addition, the Rwenzori Landscape is well endowed with diverse local cultures and traditions.</p>
Objectives of the product	Develop, brand and position Rwenzori Mountains as a viable product with potential to generate visitor traffic and engender local-economic development.
Benefit to the tourists/expected tourist experience	Developing the full potential of the Rwenzori Mountains will provide a visitor with more activities, experiences and attractions to enjoy in Uganda. It will break the monotony on consuming only savannah-based and primate related products.
Sustainability of the product	<ul style="list-style-type: none"> • The product will be sustainable to the extent the actors deliver an excellent service and competitive prices. This will require adequate capacity building, sensitization and active involvement of all major stakeholders. • Partnerships are critical to effective service delivery, and the product should be aggressively marketed by both the government and other stakeholders.
Required activities to develop the product by the tourism sector and other line sectors	<ul style="list-style-type: none"> • Establish and renovate key infrastructure particularly: <ul style="list-style-type: none"> ○ Renovating the Fort Portal - Kasese Road ○ Renovating and upgrading the Kasese airstrip to ease air access to Rwenzori ○ Upgrading/tarmacking the 17 kms of the road to the Rwenzori park gate to ease access. ○ Upgrading/tarmacking the road connecting Kasenda crater lakes to Rwimi for easy linking to Fort Portal-Kasese Road • In partnership with the private sector (for market access and investment), undertake development

of tourism products in the mountains:

- Central Circuit Mountaineering Experience, a 7 day trek from Nyakalengija, Kasese District to the Margharita Peak. Improve quality of accommodation, sanitary conditions, tourist standard infrastructure, communication systems, rescue services, guide professionalism, congestion in the huts and governance system. Also fix the bridges on the trail (John Maate; Bujuku- 3 bridges; Mubuku upper – 2 bridges; Mubuku near Kicuucu – 2 bridges; and Mahoma -1bridge.
- Western Circuit Mountaineering Experience, a trail already piloted by UWA and RRGEA starting from Katebwa in Kabarole District to Margarita peak. Undertake development of tourist infrastructure (water supply, accommodation units, toilet facilities, zip lining routes etc); trail mapping and development; market linkages to tour operators and accommodation facilities; rescue services and facilities; and modern communication systems
- Rwenzori Cultural Heritage trail, a proposed product taking a visitor through historical, cultural sites and monuments related or linked to Rwenzururu Kingdom. The sites to constitute the trail include; the Rwenzuru palace, Bulemba where the first king was buried; Ntandi and Katebwa cultural site in Nyikigumba; King’s burial and coronation sites and palaces in the mountains. The Kyaribakytumba cultural and Kiwa heritage hot springs could all be part of this heritage trail. Establish tourist infrastructure (visitor information centre, craft centers and toilet facilities, etc.); support skills development (e.g. guides in product interpretation, guiding skills, presentation etc); improve visitor management; support the Kingdom to develop an attractive website to sell the product and to take lead role in trail development. Also support a Private- Community Partnership arrangement for development and management of some sites e.g. the Hot springs area into a modern recreation center in Kasese.
- The Karangura Trekking Experience, a well-developed trekking route to Portal Peak from Kabarole side of the Rwenzoris. The trail offers a good view of the Tooro plains, DRC, and Margharita peak. Set up tourist infrastructure (visitor information center, craft center at start point of the trail; toilet facilities, etc.); undertake skills development (e.g. training guides in product interpretation, guiding skills, presentation etc.); improve visitor management; facilitate trail development, profiling/ packaging and mapping.
- The Bularo Recreation Route, a one day route within the existing central circuit, starting from Mihonge gate. Key attractions along the trail include; diversity of bird species, a number of hot springs, lakes and cultural sites. It is a viable route for tourist activities like birding, water based tourism (boating, fishing etc) on lakes especially on Lake

	<p style="text-align: center;">Mahoma, canopy walk as well as cultural tourism.</p> <ul style="list-style-type: none"> • Construct accommodation facilities at the foothills of the mountain, in Kasese and Fort portal towns to accommodate the expected increased visitor traffic. • Undertake capacity building for the local communities, including entrepreneurs and local governments to be able to deliver high quality services to tourists. • Engage into partnerships with good quality local health facilities to provide technical services during emergencies/accidents and provide training to all staff in charge of leading clients into the mountains. Organise exposure/FAM visits to Kilimanjaro, Tanzania for the affected stakeholders for lessons on how to develop the Rwenzori Mountains. • Strengthen the security infrastructure in the mountains • Develop a strategic plan for development of a regional tourism City (Fort Portal) • Encourage/promote private sector investment in a spa/hotel and other wellness facilities around the proposed sites • Develop a Cable car system in the mountain • Develop rescue infrastructure and set up safety equipment
Stakeholder roles	<p><u>Uganda Tourism Board</u></p> <ul style="list-style-type: none"> • Aggressive marketing and promotion of the various products in the Rwenzori Mountains • Awareness campaigns in the communities about tourism and how the community especially the youth can benefit. • Oversee quality assurance among operators and facilities around the Rwenzori Mountains <p><u>Uganda Wildlife Authority</u></p> <ul style="list-style-type: none"> • Continued conservation of the Rwenzori Mountains • Mobilisation and building of conservation capacity for local communities • Provision of security to the tourists • Provision of concessions for investment in facilities such as accommodation in the mountains • Maintenance of trails and roads within the park • Promotion of the Rwenzori alongside other protected areas in Uganda • Oversee quality assurance among service providers in the park <p><u>Development/conservation organisations</u></p> <ul style="list-style-type: none"> • Provide both technical and financial support to plan and put in place necessary tourist infrastructure • Facilitate capacity building to local communities to fully participate in tourism activities • Support initial marketing efforts • Build market linkages between the local communities and other actors in the industry

	<p><u>Ministry of Tourism, wildlife and antiquities</u></p> <ul style="list-style-type: none"> • Support infrastructure development • Undertake advocacy and lobbying of major stakeholders to prioritise the development of the Rwenzori Mountains • Undertake the necessary major studies, and facilitate the development of a grand tourism development plan for the Rwenzori Mountains <p><u>Private sector</u></p> <ul style="list-style-type: none"> • Undertake investment in the product services through either private ventures, concessions or private-community-public partnerships • Undertake marketing of the Rwenzori as a tourism product in general through incorporating it in itineraries <p><u>Community Tourism Associations</u></p> <ul style="list-style-type: none"> • Organize and train communities to offer side products along the trails • Capacity building in form of business skills training so that tourism products are managed better. <p><u>Other line institutions</u></p> <ul style="list-style-type: none"> • Construct and renovate the necessary infrastructure to improve access to Rwenzori Mountain National Park
Promotion and marketing of the product	The product(s) should be integrated within the broader national tourism marketing strategies by UTB, focusing on clear segments and targets that consume such products. Overall however, marketing should be a collective responsibility of all actors involved in the product.
Expected benefits	<ul style="list-style-type: none"> • Greater potential for generating thousands of jobs for the youth and women in the region through direct employment, backward and forward linkages. • Potential for generation of foreign exchange as well as incomes for investors, local people and thus poverty alleviation • Conservation of the rich cultural and biodiversity resources of the mountains

Product Three: Support Establishment of four cultural centres (Masindi, Gulu, Mbale and Kabale)

Product name	Northern Uganda Cultural Centre
Product description	The cultural centres will provide an ambience of lively and dynamic sights, surrounded by small grass thatched roof cottages, making the places into attractive multiple centres. At the centres there will be art exhibitions, traditional dances, cultural days/nights, drama performances, cultural storytelling and poems, performances for different tribes and cultures, presentations on how to make traditional Ugandan handicrafts, arts and crafts workshops (painting, photography, sculpture and carving, creative arts, performing arts).
Objectives of the product	Promote the tangible and intangible heritage of Uganda and Uganda contemporary arts, culture, and its many expressions. Build a hallmark (branding) of the regions positioning their products and services in different markets.
Benefit to the tourists/expected tourist experience	The cultural centres will provide a unique Ugandan (Northern, Eastern and Western) cultural experience, which will involve Food, dances, crafts, history and tribes.
Sustainability of the product	Product development will take a participative approach, involving all key stakeholders, especially local communities, local authorities, the private sector and destination management organisations.
Required activities to develop the product	<ul style="list-style-type: none"> • Avail at least 10 acres of land for the cultural centres by the respective local governments • Construct required facilities at each centre namely; a Boma (live performance facility), a handicraft exhibition facility, traditional cultural huts, demonstration area (for ancient activities), 6 accommodation huts and a local food restaurant. Additionally, the centre will have parking space as well as restrooms.. Each cultural village will cost a projected US\$271,250 • Collect cultural items (using a PPP model) • Undertake capacity building of stakeholder to manage the centres • Marketing and branding of the centres
Stakeholder roles	<u>Tourism Clusters</u>

	<ul style="list-style-type: none"> • Undertake items' collections, planning, and administration of the cultural centres in conjunction with local governments • Promote the cultural centres throughout their activities <p><u>MTWA/Museum</u></p> <ul style="list-style-type: none"> • Support physical planning processes • Aid and guide items collection • Facilitate capacity development <p><u>Local government</u></p> <ul style="list-style-type: none"> • Facilitate Land acquisition • Oversee initial management <p><u>UTB</u></p> <ul style="list-style-type: none"> • Facilitate entire Product development • Integrate the product in Marketing strategy • Promote and brand the product along with already developed products in the regions • Facilitate identification of potential local investors in the centres <p><u>USAGA</u></p> <ul style="list-style-type: none"> • Support Guides training
Promotion and marketing of the product	UTB National and international marketing Campaigns.
Expected benefits	<ul style="list-style-type: none"> • Direct revenue to the local communities that will sell different services and products • Increase tourist flow to the regions will benefit the Hotel and Restaurant sub-sector • The biggest benefits of heritage tourism are diversification of local economies and the preservation of a community's unique character and identity.

Development of Lake Victoria Tourism Circuit

Product name	Development of Lake Victoria Tourism Circuit
Product description	<p>Lake Victoria is the largest freshwater lake in Africa, with a surface area of about 68,800 sq. km shared between Kenya (6%), Uganda (45%) and Tanzania (49%). The catchment area of the lake covers 180,959 km² and 15.9% of this is in Uganda. The lake has both intrinsic and tangible values that include rich biodiversity and its fragile ecosystems among others. Biodiversity combined with the scenic beauty is one of the important contributors to increased tourist arrivals in the country and the investment in the hospitality industry.</p> <p>The Circuit will start from the Uganda Wildlife Education Centre (UWEC) linking to the immediate surrounding attractions (Botanical garden, Lutembe Ramsar site, Mabamba Ramsar site, the airport, and equator) through to Ngamba Island, the numerous scenic islands in the lake up to Jinja, connecting to neighboring countries.</p>
Objectives of the product	Establish Lake Victoria Tourism circuit to enhance tourism activities and experiences around Entebbe for both domestic and regional visitors.
Benefit to the tourists/expected tourist experience	The circuit will compliment and broaden the visitor experience by offering a wide array of well planned, packaged and developed products. The product will be appealing to various segments among the domestic and regional tourists.
Sustainability of the product	Most of the land and attractions in the area are owned by the Buganda Kingdom, different religious institutions and private developers with very little owned by government. Therefore, to succeed all these stakeholders must be involved from the start and must have buy-in which will be a stepping stone for sustainable partnerships, cooperation and harmonized development. The market is readily available, all the supply side stakeholders need to do is to develop the product and government should be supportive throughout the whole process, from planning, development, sensitization, capacity building to marketing and promotion.
Required activities to develop the product	<ul style="list-style-type: none"> • Develop a tourism development master plan, Entebbe - Jinja Lake Victoria Tourism circuit. • Develop bankable projects along the Entebbe-Jinja Lake Victoria Tourism circuit which may include but not limited to:

	<ul style="list-style-type: none"> ○ A leisure cruise Boat that adheres to the required industry (international) standards ○ A floating restaurant with luxurious accommodation and conference facilities. ○ Key infrastructure such as access roads, signage, information boards, a boat pier with sizeable capacity, walking boards, bird observatory towers at Lutembe Ramsar site ○ An information centre at Lutembe Ramsar site ○ Boat trails at Lutembe Ramsar site <ul style="list-style-type: none"> • Undertake investment promotion of the Entebbe-Jinja Lake Victoria tourism circuit <p>Undertake development of the enhanced circuit by investing into and marketing of the various potential products. These products include:</p> <ul style="list-style-type: none"> •
Stakeholder roles	<p><u>Ministry of Tourism, Wildlife and Antiquities/UWEC</u></p> <ul style="list-style-type: none"> • Leading mobilization and sensitization of landlords, local communities, local governments and other actors about the tourism potential of the circuit • Undertake the feasibility study for the proposed circuit • Support development of the circuit development master plan • Support infrastructure development linking the sites • Provide policy oversight and supervision for all developments at the site • Coordination of site development activities, including participating in the evaluation and monitoring of developers at the site • Undertake lobbying and advocacy activities at the highest political level in the country <p><u>Uganda Tourism Board</u></p> <ul style="list-style-type: none"> • Lead development of the various products at the site • Marketing and promotion of the circuit • Enforcement of quality assurance standards for all operators and facilities at the site • Provide awareness campaigns, local capacity building and

	<p>development of the Buganda Tourism Cluster to harness the benefits accruing from the tourism industry</p> <p><u>Ministry of Environment/landlords</u></p> <ul style="list-style-type: none"> • Undertake development of products on their land and/or provide land for such development • Jointly work with other stakeholders to develop guidelines for sustainable use of the marine and natural resources on the lake and its catchment areas • Enforce adherence to environmental requirements <p><u>Private Sector Tourism Associations</u></p> <ul style="list-style-type: none"> • Mobilize members to promote, market and sell the newly developed tourism products on the circuit • Liaise with the UTB and other actors to undertake training of the private sector members in the area to adopt best business practices and ensure effective service delivery • Work closely with government to enforce standards and regulation of activities on the circuit <p><u>Local governments</u></p> <ul style="list-style-type: none"> • Provide land for establishment of common interest facilities, as well as investment zones • Mobilise and support the local people to fully participate in tourism in the area as operators, employees, investors, etc • Provide technical and facilitative support to the other actors to fully monitor, supervise and enforce standards for developers and operators in the area
Promotion and marketing of the product	Marketing of this product will be a primary responsibility for Uganda Tourism Board.
Expected benefits	<ul style="list-style-type: none"> • Increased government revenue, local and central • Promotion of investment and thus spurring local level development • Employment opportunities for local people and Ugandans as a whole • Environmental conservation

Appendix3: The Tourism Sector Development Work Plan and Budget

Refer to excel Sheet

Appendix 4: Monitoring and Evaluation Framework

a) Marketing and Promotion

	Objectively verifiable indicators of achievement	Sources and means of verification	Risks/Assumptions	Overall Responsibility
<i>Objective 1: To undertake targeted marketing in the core markets and attain annual growth of 10% in arrivals of leisure and business tourists by 2019/20 in these markets.</i>	<ul style="list-style-type: none"> • 559,000 inbound leisure and business tourists in 2015/16; • 617,000 in 2016/17; • 677,000 in 2017/18; • 746,000 in 2018/19; • 818, 000 in 2019/20. <p>US\$ 876 million from inbound leisure and business tourists in 2020</p>	Annual statistical reports	<p>Sufficient funding of marketing activities in core markets</p> <p>Improvement in service delivery at the local level to spur word of mouth marketing</p> <p>10% annual growth in leisure and business travellers to Uganda</p>	UTB
Advertise, select and recruit PR/advertising agencies in the UK, Germany, USA and China	4 PR firms hired to represent Uganda in the core markets (UK, Germany, USA and China).	Contracts signed with advertising firms	<p>Engagement of PR firms based on clear terms of reference</p> <p>Ability to provide adequate facilitative support to the PR firms by UTB</p>	UTB
Improve access to liability insurance cover among local tour operators to be able to provide confidence in the outbound tour operators and clients	50% of registered local tour companies with acceptable liability insurance cover	Contracts with insurance firms in source markets or their agencies locally	Availability of sound business management practices among local business operators	UTB
Actively participate in tourism trade fairs, with technical support from the PR/advertising agencies, also focusing on pre-fair activities such as road shows, media presentations, etc	<ul style="list-style-type: none"> • 6 fairs per year in core markets from 2015/16 – 2016/17 • 8 fairs per year in core markets from 2017/18 – 2019/20. • 6 Pearl of Africa Dinners in 	<p>Reports on outcomes and outputs of trade fairs</p> <p>Reports on visitor</p>	<p>Adequate preparations for the trade fairs</p> <p>Strong private sector with adequate</p>	<p>UTB</p> <p>UTA</p>

	Objectively verifiable indicators of achievement	Sources and means of verification	Risks/Assumptions	Overall Responsibility
	<p>core markets from 2015/16 – 2016/17.</p> <ul style="list-style-type: none"> 8 Pearl of Africa dinners in core markets per year from 2017/18 – 2019/20. 	arrivals from core source markets	capacity to conclude deals with outbound operators	
Develop a Uganda Tourism Brand and undertake brand management.	<ul style="list-style-type: none"> One visitor survey to define Uganda Tourism Brand Sample of final Ugandan tourism brand Involvement of key tourism industry associations 	Reports	<p>Availability of funds</p> <p>Sourcing of adept professionals to undertake the exercise</p>	MOTWA/UTB
Engage and promote Uganda’s tourism among the diaspora through among other activities organizing and celebrating the Pearl of Africa days in various cities across the source markets	<ul style="list-style-type: none"> At least 240 Ugandans abroad attend Pearl of Africa dinners per year. <p># of Uganda days celebrated abroad # of Ugandans abroad visiting Ugandan attractions # of tourism investments made by Ugandans in diaspora</p>	<p>Media reports</p> <p>Statistical reports</p> <p>Performance reports</p>	Availability of funds	UTB
Set up a Marketing Advisory Committee to monitor, advise and coordinate marketing activities of UTB, bearing in mind regional representation, key actors and their roles in the sector	Existence of marketing advisory committee regularly working with UTB	Minutes of meetings Reports of committee deliberations	All major stakeholders are represented, including those in the regions	UTB
Organize FAM trips inviting the most influential journalists and the tour operators that are most likely to feature Uganda in their portfolio of packages, and targeting high impact operators/journalists with clear terms of engagement	<ul style="list-style-type: none"> 2 FAM trips organised per year, each involving 10 influential tourism personalities 10 stories written about Uganda in core source markets as a direct result of FAM trips Number of insurance firms in source markets partnering with local insurance firms to provide policies for travellers. 	<p>Copies of stories on Uganda’s tourism in major travel/open media in core source markets</p> <p>Comments about Uganda in major travel blogs</p>	Adequate sourcing of influential travel journalists/media houses, insurance firms and organisation of the FAM trips	UTB

	Objectively verifiable indicators of achievement	Sources and means of verification	Risks/Assumptions	Overall Responsibility
Complete the development of the Uganda Tourism Portal with all relevant links and regularly updated.	An up to date and functional Uganda Tourism Portal, featuring in at least 6 international languages	Uganda Tourism Portal link online	Sourcing of the right portal developer Availability of content for the portal	UTB
Develop marketing collaterals (in English, Germany, Chinese, Russian, French and Latin), a Sales Manual and a Media Kit and distribute these widely to selected travel stakeholders.	<ul style="list-style-type: none"> 60,000 sales manual/media kits developed and printed in 6 international languages 	Reports Copies of collaterals & media kit	Availability of funds	UTB
Undertake regular market research in key source markets.	<ul style="list-style-type: none"> 1 market study in Europe in 2016/17 1 market study in North America in 2016/17 	Reports	Adequate use of modern ICT Availability of funds and skills to undertake market intelligence	UTB
Strengthen partnership with faith-based institutions to promote faith-based tourism	4 MOUs signed with faith-based institutions with clear roles and responsibilities	Copies of MOUs	Sufficient goodwill from faith-based institutions to support tourism initiatives	UTB
Develop a robust crisis management strategy and implement it	<ul style="list-style-type: none"> Copy of Uganda crisis management strategy Existence of crisis management committee 	Performance reports Press releases	Adequate coordination with stakeholders Availability of funds	MTWA/UTB
Facilitate training from UNWTO on crisis management, taking advantage of Uganda's membership to the organization and standard training approaches used by UNWTO.	2 trainings received on crisis management for the crisis management committee	Training report		MTWA
Objective 2: To develop the domestic market in Uganda by promoting events, festivals, day trips and weekend breaks.	<ul style="list-style-type: none"> 20% increase in domestic tourists to attraction sites per year directly attributable to UTB marketing activities 	Surveys on sources of information Statistical reports		UTB

	Objectively verifiable indicators of achievement	Sources and means of verification	Risks/Assumptions	Overall Responsibility
	<ul style="list-style-type: none"> 5 domestic tourism events organised annually by the five regional clusters 			
Develop guidelines for creation of tourism clusters and provide both technical and financial support for establishment of tourism clusters in the regions	<p>5 functional regional clusters created in the regions</p> <p>At least 10 trainings provided to tourism clusters, 2 per cluster</p>	<p>Specific office addresses of tourism clusters in the regions</p> <p>Reports</p>	<p>Political support in the creation of tourism clusters</p> <p>Effective leadership to create internal cohesion</p>	UTB
Develop and implement a calendar of Events and Festivals.	A printed calendar of tourism events annually	<p>Reports</p> <p>Media stories (print & electronic)</p>	<p>Active involvement and participation of tourism clusters and other stakeholders</p> <p>Availability of funds</p>	UTB/MTWA
Undertake advertising using web-based platforms (social media, websites and blogs) but also tourism promotions prior to major events in local media (TV, radio, newspapers and magazines) as well as outdoor advertising.	<p>#of adverts played on TV, radio, newspapers and magazines</p> <p>12 blog articles written about domestic tourism per year, one per month</p> <p>5 functional tourism social media outlets operational in 2015/16</p>	<p>Copies of adverts in the media</p> <p>Copies of articles on blogs and social media outlets</p> <p>Media reports</p> <p>Dedicated web-based platforms for domestic tourism</p>	Availability of dedicated personnel committed to the functioning of the web-based platforms	UTB
Organise an annual international tourism trade fair in Uganda.	An annual tourism trade fair in Uganda with at least 40% of exhibitors coming from outside Uganda	<p>Media reports</p> <p>Post-fair evaluation reports</p>	Active involvement and engagement of key stakeholders	UTB

	Objectively verifiable indicators of achievement	Sources and means of verification	Risks/Assumptions	Overall Responsibility
			Availability of funds	
Organise domestic FAM trips with the media to encourage coverage in the electronic media and articles in the published press.	4 FAM trips organised per year At least 8 media stories/reports about Uganda's tourism as a direct result of FAM trips	Copies of stories on Uganda's tourism in major travel/open media in Uganda	Adequate sourcing of influential travel journalists/media houses and organisation of the FAM trips	UTB
Set up desks or stalls at events that the targeted domestic market segments attend to distribute information and promote events and packages.	5 major local events attended per year for distribution of promotional materials.	Reports		UTB
Undertake school outreach programs in each of the regions of Uganda to create awareness on the importance of tourism, and trigger formation of school tourism clubs and school tourism trips.	100 schools visited per year country-wide, and 100 tourism clubs formed and supported in these schools.	Copies of clips of such talk shows	Availability of funds Regular follow-up and coordination of school outreach program at MTWA	UTB/MTWA/UTA
Initiate tourism marketing partnerships with local corporate enterprises to promote the tourism potential of Uganda	10 MOUs signed and implemented with major corporate firms in Uganda by 2019/20	Copies of MOUs Reports on performance of MOUs	Presentation of corporate entity valence, and a clear brand identity to promote	UTB
Promote investment in mid-range B&B accommodation in Protected areas	12 midrange safari lodges built in 6 Protected areas	Physical visits to established facilities	Availability of adequate effective demand to sustain the investments	
<i>Objective 3: To promote and attain a 15% annual increase in regional leisure and MICE travellers to Uganda's key attraction sites and facilities by 2019/20.</i>	15% annual increase regional leisure and business tourists at Uganda's key tourist attractions & accommodation facilities	Statistical reports		UTB
Undertake promotion of events and festivals of a regional nature, working with stakeholders that already organize these festivals	4 regional tourism events participated into per year	Reports		UTB
Create a MICE Bureau in Uganda	Functional MICE Bureau in	Reports	Sufficient cooperation	UTB

	Objectively verifiable indicators of achievement	Sources and means of verification	Risks/Assumptions	Overall Responsibility
	Uganda	Physical inspection of facility	of private sector	
Participate in regional tourism trade fairs	4 regional tourism trade fairs attended by UTB and the tourism private sector	Reports Media stories	Availability of funds	UTB

b) Human Resources Development

	Objectively verifiable indicators of achievement	Sources and means of verification	Risks and Assumptions	Overall Responsibility
Objective 1: Streamline tourism and hospitality training in Uganda		Annual reports	Performance of Contractors is poor with inadequate inputs	
Collect, review and improve/harmonise training contents of tourism and hospitality training curriculums of all recognised training institutions at certificate, diploma and degree levels.	<p>At least 50 collected training contents / curriculums from 23 institutions at three levels: certificate level, diploma level and degree level (undergraduate)</p> <p>At least 50 reviewed training contents / curriculums with a focus on top 15 diplomas and certificates indicated p77 of MOTWA report (2014)</p> <p>At least 50 improved training contents / curriculums</p>	Report	Performance of Contractors is poor with inadequate program management inputs	UICTHP MOTWA Experts
Create the Uganda Institute of Certified Tourism and Hospitality Professionals to certify curriculums and practitioners; standardize and harmonise training; ensure quality assurance; and enforce professional ethics	Registration of the UICTHP	Certificate of registration	<p>Availability of funds</p> <p>Adequate support of the Institute from stakeholders, including existing professionals.</p>	<p>MOTWA</p> <p>Tourism Alumni associations</p>
Create on-the-job training modules certified to national accreditation standards	One module created for each of the 8 tourism value chain nodes	Copies of modules	Sourcing of the right personnel to develop the modules	MOTWA
Upgrade the training facilities and institutional capacity of HTTI	Modern training facilities and well trained personnel at HTTI	Reports	Implementation of project on time	MOTWA

Objective 2: Enhance the capacity and skills of in-service personnel in the tourism and hospitality industry				
Undertake a Training needs assessment in the private sector, taking a value chain approach	Achieved assessment including a strategy for TOT	Report	Performance of Contractors is good with adequate competencies	MOTWA UICTHP
Create a critical mass of TOTs to run the tailor-made trainings, coordinated by HTTI	50 TOTs trained, 10 for each regional cluster.	Training Reports	Availability of funds Proper coordination of the intervention by HTTI	HTTI UICTHP MOTWA
Deliver on-job trainings to the stakeholders to address the identified training needs	400 workers trained per year starting 2017/18	Training Reports	Ardent cooperation of private sector	Master Trainers UICTHP
Facilitation of internships of students from training institutions	1500 interns trained in the sector per year	Reports		UTA
Undertake an HR audit in the ministries, departments and agencies	50 qualitative interviewees	HR Audit report	Contractors is good with adequate competencies	Experts MOTWA
Undertake “upskilling” of the workforce of both the MoTWA and the National Council for Higher Education (NCHE) to enforce compulsory accreditation and compliance to training standards.	10 organised trainings in each of 8 main nodes of the tourism value chain	Trainings minutes / reports	Low Staff turn-over in private and public sectors	HTTI MOTWA UICTHP
Objective 3: Increase demand for tourism-related job opportunities by highly skilled individuals				
Support long-serving incentive scheme in the sector on PPP arrangement as part of the Pearl of Africa tourism day celebrations	Introduction of long-serving incentive	Report / Statistics on employment characteristics in tourism	Ardent cooperation of private sector	MOTWA
Run a national career awareness drive to enhance the interest in tourism	<ul style="list-style-type: none"> 1 national tourism essay competition per year 12 publications per year of individual profile of tourism 	MOTWA Annual Tourism statistics report	Strong HRD capacity in Tourism Ministry Political support for	MOTWA UTB UWA

	employees in newspapers <ul style="list-style-type: none"> • At least 12 school visits per year by Tourism minister • 2000 printed visitor's expectations booklet 		the intervention	
Generate market exposure for "real" Ugandan Structures (Travel magazine, websites, etc.)	At least 5 publications per year	Travel magazines, websites, newspapers...	Strong HRD capacity in Tourism Ministry	UTB MOTWA

c) Tourism Management and Regulation

	Objectively verifiable indicators of achievement	Sources and means of verification	Risks and Assumptions	Overall Responsibility
<i>Objective 1: Improve tourism sector coordination and management</i>				
Undertake a feasibility study on the options for managing and coordinating the tourism MDAs	Feasibility report with recommendation on best way to manage and coordinate tourism in Uganda	Feasibility study report	Stakeholder commitment	MTWA
Implement the recommendations of the tourism sector coordination and management feasibility study.	2 consensus building workshops and 1 retreat for accounting officers in 2016/17	Annual Reports		MTWA, UWA, UTB, UWEC,
<i>Objective 2: Establish at least five regional tourism development offices (east, north, central, west and southwest) for information collection dissemination, quality assurance, cluster development, product development and marketing</i>	5 fully functional regional tourism development offices At least 5 regional tourism clusters formed 1 tourism sensitisation campaigns undertaken per year			
Engage concerned stakeholders to provide office space for establishment of the regional tourism offices	Office space for regional tourism development office secured at local government administration premises	MOUs Physical inspection reports	Cooperation of the local governments	UTB/MTWA
Furnishing and equipping regional tourism development offices.	5 regional tourism development offices fully equipped and furnished 5 fully functional regional offices	Physical inspection reports	Availability of funding	MTWA/Clusters
Support quarterly regional tourism forums coordinated by the regional tourism offices and the tourism the clusters.	15 quarterly regional tourism forums per year	Reports	Stakeholder commitment	
<i>Objective 3: Establish a sustainable tourism development observatory for regular, reliable and consistent tourism data collection, analysis, and dissemination to stakeholders</i>	Functional Uganda tourism observatory in a reputable research institution	Reports Copies of collaterals & media kit	Availability of funding	UTB
Set up a tourism observatory at the reputable	Reputable institution engaged to	MOU	Availability of	MTWA

	Objectively verifiable indicators of achievement	Sources and means of verification	Risks and Assumptions	Overall Responsibility
research institution to collect and disseminate tourism information on a regular basis.	accommodate tourism observatory		funding	
Build the capacity of tourism stakeholders to capture and manage tourism related data.	160 stakeholders from different institutions trained in data management	Training reports	Availability of funding	MTWA/research Institution
Develop a sustainability plan for the tourism observatory	Sustainability plan developed in year 3 of the plan			
Conduct quarterly surveys to collect data for three years to establish a reliable database to act as a building block for future national tourism data collection and management.		Datasets Tourism statistical reports		
Set up a tourism observatory at the reputable research institution to undertake and disseminate on a regular basis tourism information	1 exit survey conducted per year 1 domestic tourism study conducted per year 1 supply side study conducted per year 1 tourism impact study conducted every two years	Survey reports		
<i>Objective 4: Improve tourism and hospitality service delivery for industry competitiveness</i>				
Undertake classification, certification and licensing of tourism facilities and operators along the entire value chain	90% tourism facilities licensed per year 50% tourism facilities quality assured per year	Performance reports	UTB	
Undertake training of one additional cohort of 50 assessors	50 quality assurance assessors trained	Training reports		
Undertake awareness and sensitization campaigns for standards and certification to enhance compliance	A functional standards and quality assurance grievance mechanism established 1 awareness and sensitisation campaign undertaken per year per region	Awareness and sensitization reports		
Build capacity in local authorities to enforce quality assurance	10 local government officers trained per region per year for two years	Performance reports Training reports		

	Objectively verifiable indicators of achievement	Sources and means of verification	Risks and Assumptions	Overall Responsibility
Facilitate formation and development of tourism clusters.	5 tourism clusters formed and supported country-wide	Reports	Availability of funding	UTB
Facilitate the setting up of a fully-fledged UTA secretariat to handle all technical and administrative activities of the association to be able to implement its strategic plan	A well-coordinated tourism private sector in Uganda Fully functional UTA secretariat Wider membership of UTA	Physical address of UTA secretariat Performance reports	Availability of funding	MTWA/UTB
<i>Objective 5: Improve tourism infrastructure (roads, air access, electricity, stopovers, water, internet [fiber cables and Wi-Fi blankets], and signage)</i>				
Liaise with relevant MDAs to prioritise/include tourism roads, and provide tourism support infrastructure in key tourism zones	80% of tourism roads in need of improvement successfully lobbied and worked upon	Physical roads constructed	Continued prioritisation of infrastructure development by government	MTWA
Undertake feasibility study for reintroduction of the Uganda airlines carrier	Feasibility report on revival of national carrier	Feasibility Report	Adequate political support	MTWA
Establish fiber cables; Wifi infrastructure (e.g. fiber cables and wifi blankets) in strategic tourist areas	100% of major tourist sites connected to functional ICT infrastructure	Reports	Adequate funding	NITA
Resurface and maintain four airstrips at Pakuba, Chobe, Kidepo, Kasese.	4 airstrips resurfaced and maintained in protected areas	Reports Physical airstrips		UWA/CAA
Install security screening machines at airstrips to enhance security of travelers.	At least 4 security screening machines installed at airstrips	Reports		UWA/CAA
<i>Objective 6: Implement a sustainable source of funding for the tourism sector.</i>				
Undertake tourism levy implementation by the Uganda Revenue Authority to generate	Additional US\$9.5 million to the tourism sector per year	Levy receipts	Political and private sector support for levy	UTB/URA/MoFPED

	Objectively verifiable indicators of achievement	Sources and means of verification	Risks and Assumptions	Overall Responsibility
estimated US\$9.5 million per year in additional revenue for the sector in 2016/17.		Levy implementation reports	Effective utilisation of levy proceeds Proper tax business planning	
Secure a credit line to avail low cost financing to the tourism private sector to facilitate acquisition of specialized tourist transport vehicles.	US\$15 million provided as credit facility for private sector in tourism	Reports	Proper management of the credit facility	MTWA

d) Logical Framework: Natural and Cultural Heritage Conservation

Natural and cultural heritage conservation	Objectively verifiable indicators of achievement	Sources and means of verification	Risks and Assumptions	Overall Responsibility
Objective				
<i>Objective 1: Strengthen the boundaries of protected areas and improve stakeholder engagement to reduce poaching, encroachment and environmental degradation in PAs</i>				
Fence off (electric and live fences) two of the most affected protected areas to control problem animals (QENP and MFNP).	420 km of a 3.3 meter high electric fence constructed around MFNP and QENP	Project progress and completion reports	Availability of funds to facilitate the process	UWA, MTWA, Ministry of Finance and support agencies
Plant boundary marking trees (preferably Eucalyptus) separating PAs and community areas to mark PA boundaries in areas where fencing is not possible or too costly.	100,000 trees to be planted each year around PAs	Reports	Availability of funds and seedlings	UWA, NEMA, NFA, Communities and Conservation NGOs
Redirect utilization of the 20% to directly fund activities in the enterprises that mitigate human wildlife conflicts	At least 10 enterprises set by revenue sharing funds	Reports Community acknowledgments	Availability of funds	UWA, MTWA, Parliament
Build the capacity of local communities through	At least 10 CBOs formed	Reports	Availability of	UWA,MTWA,UCOTA,

forming CBOs to better receive and manage funding	and trainings conducted per year per protected area	Community acknowledgments	funds and willing communities	UTA and support agencies
Facilitate and build capacity of communities to start and manage conservation enterprises linked to tourism and other high value crops that mitigate human-wildlife conflicts (e.g tea, pepper, apiculture, etc)	10 trainings conducted per year per protected area	End of task Reports Community acknowledgments	Availability of funds and willingness of communities	UWA,MTWA,UCOTA, UTA and support agencies
Engage with, and build capacity of local governments to protect and conserve historical and cultural heritage resources within their jurisdictions.	10 LGs trained per year	Training reports	Availability of funds	MTWA
Finalize amendment of Wildlife Act and enact policies that are fair to allow for community compensation in case of	An amended Wildlife Act adopted	A new Wildlife Act	Willingness of actors to finalize the process	UWA, MTWA and Parliament
Manage Areas within protected areas that are covered by invasive/ exotic species	50% of invasive species in each affected PA managed by 2019/20	Reports	Availability of funds	UWA, Research Institutions/UWEC
Reduce wildlife disease prevalence and contain epidemics in all PAs	50% of diseases in affected PAs effectively managed	Reports	Effectiveness of applied methods	UWA, Research Institutions/UWEC
Contain illegal activities in all wildlife areas	50% reduction in illicit trade, poaching and PA encroachment by 2019/20	Reports	Availability of funds Stakeholder commitment	UWA
Minimize negative impacts of oil and gas, hydro power, mining, tourism facilities.	100% compliance with EIA recommendations for the investments in the respective sectors by 2019/20	Reports		UWA, NEMA, MTWA, Ministry of Minerals and Natural Resources
Initiate joint efforts to offer veterinary support outside the PAs.				UWA, NAADS

Undertake Research and Ecological Monitoring in protected areas	2 research and monitoring studies successfully conducted	Research and monitoring reports	Availability of funds	UWA, Research Institutions
Undertake rolling out and implementation of the cashless smart card system in the protected areas.	Cashless system fully functional at all entry points of wildlife protected areas	Reports Physical inspections	Timely implementation of intervention	UWA
<i>Objective 2: Enhance Uganda's cultural heritage conservation and improve its contribution to tourism</i>				
Modernize the National Museum in Kampala	A significantly improved national museum in Kampala	Physical inspection Reports	Availability of funds	MTWA
Establish 3 Regional Museums (Mbarara, Fort Portal and Arua)	3 regional museums established			
Develop 8 Heritage Sites in in Eastern, Central, Western and Northern Uganda regions, and have them gazetted as UNESCO world heritage sites.	8 heritage sites developed and submitted to UNESCO for inclusion on tentative list of world heritage sites			

e) Tourism Product Development

	Objectively verifiable indicators of achievement	Sources and means of verification	Risks and Assumptions	Overall Responsibility
<i>Objective 1: Upgrade and redevelop two existing tourism products to enhance tourist experience and economic impact</i>				
Product 1: Upgrade and redevelop the Source of the Nile site into a world-class visitor attraction				
Develop a physical development Master plan for the Source of the Nile	Feasibility study on list of commercially viable products for development at the source of the Nile	Feasibility report Copy of Master plan	Availability of funds Adequate effective	MTWA/UTB

	Objectively verifiable indicators of achievement	Sources and means of verification	Risks and Assumptions	Overall Responsibility
	Physical master plan for development of the Source of the Nile		demand	
Prepare bankable project profiles for the different investment projects at the Source of the Nile	15 investment project profiles developed for opportunities at the Source of the Nile	Copies of investment profiles		
Undertake investment in development of products - the Uganda Railway Heritage Route; Cultural Village; Bird Watching on the Source and Lake Victoria islands; and upgrading marine and land-based recreation.	At 5 new products developed at the Source of the Nile	Reports Visitor comments		
Construct a modern information and interpretation center with adequate and well maintained public utilities	A functional visitor information centre at the Source of the Nile	Reports Physical structure Visitor comments		Jinja Municipality
Improve informational and directional signage to the Source of the Nile	Signage at the source of the Nile	Physical signposts		Jinja Municipality
Build partnerships with the private sector to upgrade and set up quality restaurant and catering facilities at the site	A modern restaurant and catering facility at the Source of the Nile and also at Itanda Falls	Statistical reports	Effective marketing to ensure adequate tourists	UTB
Create a reliable pool of divers and tour guides to provide rescue and quality tour guiding services at the Source of the Nile.	30 divers and 30 tour guides trained and equipped at the Source of the Nile	Training reports		MTWA
Product 2: Develop, brand and promote the Rwenzori Mountains				
Improve Rwenzori Mountain Trails - Central Circuit; Western Circuit; Rwenzori Cultural Heritage trail; Karangura Trail and Bularo trail	5 well developed trails with functional bridges, board walks and ladders, resting and viewing points as well as information centres.			

	Objectively verifiable indicators of achievement	Sources and means of verification	Risks and Assumptions	Overall Responsibility
Construction of budget accommodation facilities on Mahoma trail	1 midrange accommodation of 15 rooms established in the Mountains 6 tents and camps renovated and improved	Reports	Adequate marketing of the Rwenzori to generate demand	UTB
Develop a Cable car system in the mountain	A functional cable car in the Rwenzori mountains	Physical inspections Reports	Availability of funds	MTWA/UWA
Install rescue and safety equipment and facilities in the Rwenzori Mountain National Park	Ambulance, a rescue helicopter and helipad, and communication systems established in the Mountains	Physical inspections Reports	Availability of funds	UWA
Construct a monument at Margareta Peak	Monument at Margareta Peak	Physical inspections	Availability of funds	UWA
Develop a Master Plan for development of a Tourism City in Fort Portal	Master plan for a tourism city in Fort portal	Copy of the plan	Adequate funding	Fort Portal Municipality
Objective 2: Develop two new tourism products to enhance tourist experience and economic impact				
Product 1: Develop four cultural centres/villages (Gulu, Kabale, Hoima and Mbale)				
Construct the cultural village/centre and all other associated facilities using the ppp model	4 cultural centres constructed and fully operational with a live performance facility, a handicraft exhibition facility, traditional cultural huts, demonstration area (for ancient activities), 6 accommodation huts and a local food restaurant. 20% of pro-poor impact of cultural centres on local communities	Physical inspections Reports	Adequate funding	MTWA/Local governments

	Objectively verifiable indicators of achievement	Sources and means of verification	Risks and Assumptions	Overall Responsibility
Undertake capacity building of staff to man the cultural village including guides	At least 50 staff trained to manage and work at the cultural centres	Reports	Adequate funding	MTWA/Local governments
Marketing and branding including website development and FAM trips	Fully functional website for each cultural centre	Reports Google search	Adequate funding	Local governments
Product 2: Development of Lake Victoria Tourism Circuit				
Develop a tourism development master plan, Entebbe - Jinja Lake Victoria Tourism circuit.	Tourism development master plan for Entebbe - Jinja Lake Victoria Tourism circuit developed	Copy of the master plan	Adequate funding	MTWA/UWEC/ KCCA
Develop bankable projects along the Entebbe-Jinja Lake Victoria Tourism circuit	10 bankable project profiles developed for investment in the circuit	Copies of project profiles	Adequate funding	MTWA/UIA
Undertake investment on the Entebbe-Jinja Lake Victoria tourism circuit	10 medium-size to large scale investments developed on the circuit	Physical inspections	Availability of land Cooperation of key landlords	Private sector
Product 3: Undertake investment in mid-range B&B accommodation in Protected areas	12 B&B lodges in six protected areas	Reports Physical inspections	Adequate demand for the services Availability of concessions in prime areas	MTWA/UWA/ U TB/UIA

Appendix 5: The Core Markets of Focus for Uganda

	Tourist arrivals					% change since 2009
	2009	2010	2011	2012	2013	
<i>Austria</i>	897	20,304	13,820	2,132	1,724	92.2
Belgium	2,787	3,629	5,156	5,094	5,050	81.2
Czechoslovakia	425	371	483	383	536	26.1
Denmark'	3,000	3,145	4,159	3,890	3,426	14.2
Finland	730	577	513	642	490	-32.9
France	3,467	3,893	4,437	4,938	4,594	32.5
<i>Germany</i>	6,778	8,650	8,960	11,701	11,070	63.3
Ireland	1,820	2,143	1,663	2,414	1,694	-6.9
Italy	4,567	5,505	5,335	6,732	7,128	56.1
Netherlands	6,017	7,651	8,380	8,275	7,510	24.8
Norway	2,827	2,874	1,877	2,705	2,543	-10.0
Sweden	3,734	4,464	4,308	5,866	5,670	51.8
Switzerland	1,723	2,076	1,056	2,362	2,896	68.1
<i>United Kingdom</i>	35,716	39,171	77,702	42,508	43,009	20.4
Yugoslavia	28	117	13	26	24	-14.3
<i>Canada</i>	6,999	8,353	8,550	10,186	9,729	39.0
USA	37,971	45,856	47,869	55,912	56,766	49.5
<i>China</i>	4,629	5,692	6,971	8,645	10,792	133.1
<i>India</i>	12,946	16,747	19,419	24,849	28,647	121.3
<i>Australia</i>	4,087	4,870	4,827	7,165	7,842	91.9
<i>Russia</i>	613	733	4,535	4,250	3,542	477.8
Total	141,761	186,821	230,033	210,675	214,682	

UBOS, 2014

Core Markets of Focus

Looking at the trend of tourists to Uganda over the last five years, it is clear that the Russian market has registered the biggest growth rate (477.8%), followed by the Chinese (133.3%), Indian (121.3%), Australian (91.9%) and the Austrian (92.2%) markets. In relative terms therefore, these markets represent an opportunity for Uganda because they are growing rapidly without any government investment in these markets. This means that with proper promotion and marketing, there is potential for further growth in these markets.

In absolute terms however, the UK and USA contribute almost half of all the inbound tourists to Uganda and growth in these markets has been only 20% and 50% respectively over the last five years. This small growth, compared to the fast growing segments above, represents a marketing gap (opportunity) because these countries still rank among world's top tourism spenders. In the next five years Uganda needs to consolidate its position in the following core markets:

UK, USA, Germany: These markets are worthy of investment because they rank among the top world tourism spenders; already visit Uganda and their product preferences match the products offered by

Uganda. Thus positioning the unique tourism products represents a strong competitive strength for Uganda in these markets. Uganda should particularly attract wealthier experienced international travelers, between the ages of 40 and 60 whose children (if any) have left home. They typically look for natural beauty and authentic cultural experiences which Uganda is abundantly endowed with. They prefer independent or small group travel, and look for luxury and comfort as part of their experience. Uganda should also attract the adventurous segment made up of younger singles or couples between the ages of 25 and 40 and generally do not have children. These are often young urban professionals earning higher incomes, and already have considerable travel experience. Their desired experience often centers on nature, culture and adventure, aspects that Uganda is well endowed with. While also concerned with issues of safety and comfort, these consumers are driven more by the emotional appeal of a destination and its diversity. Thus with effective marketing, this segment can be attracted to Uganda.

However, note should be made that while outbound tourism numbers from Germany remain consistent, the German economy has relatively suffered from the economic pressures of the Eurozone and exchange rate fluctuations. This is evidenced in functional drivers of travel such as affordability, proximity, allowable holiday time and ease of travel playing a greater role in decision making. This has in turn resulted in more Germans choosing short haul destinations (e.g. Italy, Spain) at the expense of long haul destinations like Uganda. Within this market Uganda can make meaningful strides on three key segments: the backpackers (students who want to travel/explore the world; they follow the backpacker trail and want to meet other youth travellers; have long length of stay; participate in many activities; and adopt independent travel style); the outdoor enthusiasts (individuals above 30 years who are active independent travellers attracted to Uganda's nature/landscapes; they seek to broaden their minds, learn and explore new things); and the organised tours (individuals above 30 years whose travel is typically holiday and are high spenders).

The UK was hit hard by the Global Financial Crisis and the bad publicity made by the Uganda Anti-homosexuality Act (2014). While there are signs of improvement, recovery continues to be slow. This slower-than-expected economic recovery, the weak British Pound and the high UK Air Passenger Duty are continuing to severely affect long haul travel. Uganda annually receives about 40,000 arrivals, making the UK market second only to USA for visitor numbers, however it is unlikely Uganda will see significant growth in visitor arrivals again until the UK economy begins to grow and the currency strengthens. Active boomers, backpackers and business travellers should be the primary segments of focus in this market.

The desire for travel from the US remains strong with outbound travel reaching just under 60 million in 2011. Although high by international standards, this equates to only one fifth of the US population. In recent years, international travellers from the US have become more elusive due to the recession, the H1N1 virus and safety concerns. These factors have caused Americans to travel domestically or nearby in neighboring North American countries (including the Caribbean). For Uganda the US is a top priority market because it is not the largest single source of inbound visitors but the US travellers characteristically spend strongly per night. There are four groups that should be of focus for Uganda: young adventurers (22-35 years, very active, experienced travellers); independent explorers (45-65 year couples, established outdoor enthusiasts, seeking to broaden their minds and connect with people); organised tours (above 65 years, packaged travellers that need to feel safe/comfortable, and want to learn and explore new things while having fun); and business travellers (conferences, NGOs, faith-based and businessmen).

The countries above also have large populations of people of Ugandan descent settled there. For instance, according to the Ugandan North American Association (UNAA), there are 120,000 people of Ugandan descent in the USA and Canada. A 2006 survey in the UK explains that the number of people

of Ugandan ancestry living in the UK are between 180,000 and 350,000, 85% of which live in the London area, and if the descendants of the Ugandan Asian that were expelled by Idi Amin are included, the figure could be as high as 750,000¹⁰. These people have personal links with Uganda depending on when they emigrated. First generation emigrants will return to the mother country mainly to visit friends and relatives and will most likely be accommodated in their homes. They will generally enjoy the same products as their hosts and act like domestic tourists but often with a greater budget to spend on leisure and entertainment. Second and third generation overseas Ugandans will be interested in experiencing as much of the country as they can, based on stories they have heard from their parents, grandparents and relatives and will want to see all the attractions (including the prime products), especially those that relate to their ancestry. The Diaspora is generally fairly easy to reach as they often have associations, newspapers and community facilities and events that can be excellent distribution channels to disseminate information on Uganda, offer packages to visit Uganda and organize functions that involve association members.

Russia, China, Australia, and India

China is currently the world leader in outbound tourism expenditure and this market has grown by over 368% since 2005¹¹. There are millions of Chinese travellers all around the world looking for iconic attractions, business opportunities, culture and holiday, and in 2013 about 10,000 visited Uganda without any marketing in this source market. China and India are Uganda's largest trading partners and promoting the country both for business and leisure tourism in these two countries represents a strong business opportunity. Besides, Uganda enjoys strong historical ties with India, and promoting the business segment in this market would particularly be a good opportunity. High disposable incomes and a willingness to spend on luxury brands and big-ticket items like holidays, as well as an increasingly global mind-set, are driving outbound travel from India. The UNWTO predicts that India will account for 50 million outbound tourists by 2020. With over 28 million passport holders in the country who are potential travellers, the source market for outbound travel is wide and complex because of its size and variety. India's real GDP growth is forecast to average 6.4 per cent a year for 2012-30, making India the fastest-growing large economy in the world during the period.

China's continued economic strength and growing middle-class has generated double digit growth in Chinese visitor arrivals to Uganda in recent years. Chinese tourists overtook Germans as the world's biggest-spending travellers in 2013. International trips by Chinese tourists have reached 83 million annually, up from 10 million in 2000, however only 10 per cent of these trips were to long-haul destinations. The focus should be on actively targeting high value visitors and encouraging them to stay longer and spend more to maximize the value from, and leverage, the arrival growth Uganda is experiencing from China. Uganda will however need to address value issues through ensuring delivery of quality services that meet the standards and expectations of the Chinese consumers.

Furthermore, Australia has a very strong tourism culture and currently 7,800 Australians visit Uganda largely for leisure (55%) and spend more than the other countries per trip (US\$2700 compared to US\$2200 for Europe and America). Globally, Australia ranks among the top 15 outbound tourism spenders and this market has grown tremendously since 2005. The strategy should be to target higher value visitors through a focus on special interest areas such as gorillas, adventure, wildlife, hiking/walking and cycling. The focus should be on Young Adventurers (18-29 years, active, social and seeking adventure); Independent Professionals (Early 30s, seeking break from work and busy lives. High disposable income and enjoy luxury) and Silver Surfers (active older couples, high disposable income, crave for new experiences).

¹⁰ International Organisation for Migration (2006) *Uganda Mapping Exercise*, London

¹¹ UNWTO (2014) World Top Tourism Spenders

The Regional Market

There are two priority segments within the regional market. The first major segment includes European, Asian and American visitors to the neighboring Kenya, Tanzania and Rwanda who seek to track gorillas and other primates, undertake white water rafting, mountain climbing and who seek to see the source of the Nile, the Namugongo Martyrs shrine and many other attractions non-existent in the neighboring countries. The second priority segment are the middle class citizens who are estimated at over 29 million within the EAC region¹². Such a market represents a strong opportunity for Uganda to invest into. Among these people are expatriates with a good disposable income but short on what to do and where to do it from. The diversity of the Ugandan culture, events, festivals, vibrant night life and the adventure tourism opportunities are the hooks that can be used to convince this market to choose Uganda.

The Domestic Market

A recent domestic tourism study by UNDP (2013) reveals that most of the domestic tourists are working class in the private sector (62%) either as employees (34%) or as entrepreneurs (28%). Their net monthly income is often above the national average monthly income. Most of the tourists are young adults, with 71% of them below the age of 30 and single. They travel mostly for purposes of leisure and recreation, business, VFR and education. Domestic tourists spend an average of UGX10,000-50,000 per trip. Most of them prefer beach activities such as swimming, beach games, eating fish, enjoying music and resting in tree sheds with a cool landward breeze. Thus, beaches both in Ssese Islands and on Lake Victoria Shores represent a key hub for domestic tourism in Uganda. These visitors also prefer activities such as going out for a meal; going for entertainment in cinema halls, live concerts and theatres; adventure and wildlife viewing.

The centrality of the domestic market segment is its ability to sustain the industry during low seasons, and when foreign tourists cannot be relied upon especially during difficult times such as financial crises, terror attacks, and disease outbreaks. Within the domestic tourism segment, Uganda should target foreign residents working with missions, NGOs and other organizations; the top 10% of the educated affluent Ugandans; students from primary to University; and the business community largely composed of people with low formal education.

¹² <http://www.theeastafrican.co.ke/news/-/2558/1167238/-/view/printVersion/-/lo5kug/-/index.html>

Appendix 6: Cascading Model for Training of Trainers

The Hotel Training Initiative will attempt to meet the demand of skilled labour for hotels in Uganda. The HTI should facilitate the increase of skilled persons in the hospitality industry. It consists in providing a number of “training of trainers” courses following a cascading model. The program should cooperate with a reputable hospitality Training institute in the field of hotel management.

The program should identify highly experienced Ugandan candidates, having already worked in foreign countries, with qualifications to attend a Training of Trainers course in order to become Master Instructors for the HTI Component:

- Front Office
- Food and Beverage Service
- Food and Beverage Production
- Housekeeping

After the completion of a 8 months instructor course both in HTTI and in the main high-end hotels in Kampala (during low-season), the master instructors will be offered a two years contract to belong to a Mobile Training Unit with the aim to improve competencies of management team in hotels all over Uganda. Upon completion of the training, participants should be:

- Able to independently plan, prepare and conduct training for a group of learners, following the curriculum and materials of the above mentioned Management Institution
- Able to select appropriate training methods for a given learning objective
- Able to plan, prepare and conduct all training sessions in English
- Able to recognize new trends in vocational training and participate in curriculum reviews

Partnerships will then be established with the Uganda Hotels Owners Association to provide free accommodation and meals to the Mobile Training Unit as a compensation for the training costs.

Support to the Uganda National Bureau of Standards can complement these efforts by supporting the development of skills standards and a credible system of skills testing and certification.

Appendix 7: List of selected stakeholders consulted

S/N	Stakeholder Institution	Focal person engaged	Contact
1.	Ministry of Tourism, Wildlife and Antiquities	Hon. Maria Mutagamba	
2.	Ministry of Tourism, Wildlife and Antiquities	Amb. Patrick Mugoya, Permanent Secretary	
3.	Uganda Tourism Association	Herbert Byaruhanga, President	0777912938
4.	Association of Uganda Tour Operators	Gary Seagul, Board Member	
5.	Uganda Safari Guides Association	Herbert Byaruhanga, Chairperson	0777912938
6.	Civil Aviation Authority	Mr. Tom Davis Wasswa Head of Marketing	0752433663
7.	Representative of regional airlines	Mr. Chris Winyi	
8.	Uganda Wildlife Authority	Mr. Stephen Masaba, Tourism and Business development	0754741708
9.	Ministry of Foreign Affairs	Mr. Elly Kamuhangye	
10.	Uganda Tourism Think Tank	Mr. Geoffrey Baluku	0752975961
11.	Turkish Airlines	Mr. Gonza, Marketing Manager	
12.	Eagle Air	Mr. Tony Rubombora, MD	
13.	East African Business Council	Executive Chairman	
14.	Aerolink	Mr. Njoroge, Country Manager Uganda	
15.	Ministry of Finance, Planning and Economic Development	Principal economist (tourism desk)	
16.	Ministry of Tourism, Wildlife and Antiquities	Mrs. Grace M. Aulo, Director Tourism	
17.	Ministry of Tourism, Wildlife and Antiquities	Mr. Rosemary Kobutagi	
18.	Ministry of local government	Mr. James Ogwang, Senior Economist, LGFC	
19.	National Information Technology Authority	James Saaka, ED	
20.	Ministry of Transport and Works	Head of UNRA	
21.	Uganda Tourism Board	Mr. Steven Asimwe, CEO Mr. John Sempebwa, Deputy CEO	
22.	Uganda Hotel Owner's Association	Sylvia Ntabaazi, Executive Secretary	

23.	Ruboni Community, Kasese	Bwabu Thembo Samuel	bwabusamuel@gmail.com
24.	Queen Elizabeth Tour Guide	Muzamilu K. Bisanga	muzamilu@gmail.com
25.	KAFRED	Tinka John	tinkabigodi@gmail.com
26.	Kabarole Tours	Richard Tooro	rtooro@yahoo.com
27.	Rwenzori Ranges Guides And Esctorts Association	Byaruhanga Masereka Israel	Rrgea1@gmail.com
28.	D.C.O Bundibugyo	Musinguzi John	johnmusinguzi@gmail.com
29.	Rwenzori Mountaineering Services	Baluku Stanley	Stanbal2002@yahoo.com rwenzorims@yahoo.co.uk
30.	Warden Tourist/Semuliki National Park	Aggrey Oundo	aggreyoundo@yahoo.com
31.	DID Kabarole	Mugume Kabango	mugumekabango@yahoo.com
32.	UWA-RMNP, Warden Tourism	Gangiriba Robinah	robinahg@yahoo.co.uk
33.	National Planning Authority	Nokrach Chris	chrisnokrach@npa.ug
34.	Kabarole District Local Government	Busobozi Baker	Williams.beckg@gmail.com
35.	Ministry Of Tourism, Wildlife & Antiquities	Alex Asimwe, PPA	alexjessey@tourism.go.ug
36.	District commercial Officer Kapchorwa	Musoke Musobo	mmwoko@yahoo.com 0750551029/0782906612
37.	Environmental Officer KDLG	Ojangole .O. Silvester	ojangulesilvester@gmail.com 0784791495/0750966397
38.	Bishop James Hannington Memorial site Kyando	Rev Canon Thomas Mwandha	mwandhathomas20@gmail.com 0788844940
39.	Jinja Municipal Council Tourism Development Office	Simon Kaita	0782198219
40.	Busoga Tourism Initiative	Mbooli Edwin	0755803899
41.	Mbale DLG	Wiin Wepukuhu	willywepukuhu@yahoo.com 0772464802
42.	NPA	Aaron Warikhe	0774693701

43.	DCO/SOROTI	Ogunia Benjamin	0772372964
44.	DEO/SOROTI	Adutn Goerge	0772682954
45.	DCO/KUMI	Olpot Thomas	0782404990
46.	DFO/KUMI DLG	Okalang Emmanuel	0704132016
47.	GREHTA	Edward Mashade	0702882437
48.	GREHTA	Abbas Wetaaka	0772469415
49.	TORORO DLG.DEO	Gongo John	0752626817
50.	TORORO ALTER DCO	Otia Charles	0781827738
51.	Investor Steru.wywisl.grippe	Qhelaui Wilischat	
52.	Numiga GMBH	Weltgang Nikschat	
53.	Coordinator Eastern Tourism Forum	Aidah Wentungu	0772626714
54.	Sipi falls Community Tour Guiding Office	Cherotwo Winnex	0703126424
55.	Bududa DLG	Musamali Michael	0773904582
56.	Bududa DLG	Wabusani Steven	078286214...
57.	NPA	Aaron Werikhe	0774693761
58.	Kabale University/ Kigezi Tourism Cluster	Ampumuza Christine	0782578752
59.	Uganda Tourism Information Center, Kabale	Seith Byarugaba	0772661854
60.	Nkuringo Community Conservation Development Association	Kanyamunyu Fidelis	0772987576
61.	Ankole Tourism Cluster	Kyokunda Deborah	0779344839
62.	Kisoro District Tourism Officer	Munezero Richard	0772932010
63.	Senior Warden, Tourism , Bwindi Impenetrable National Park	Geoffrey Twinomuhangi	0782319756
64.	Uganda Safari Guides Association, Kabale Regional Representative.	KamusiimeLilian	0777408098
65.	Kabale District Commercial Officer	Bakibayo Charles	0750000199
66.	NPA	NPA	eongora@npa.ug
67.	Rift Valley Resort	Rift Valley Resort	0752522351
68.	Masindi DLG,DCO	Masindi DLG,DCO	Kasofre2yahoo.com 0772559136
69.	Gulu DLG (DCO)	GULU DLG (DCO)	Okumubina2gmail.com
70.	Pacafod-Emin Pasha Coordinator Nebbi	Pacafod-Emin Pasha Coordinator Nebbi	piwangn@yahoo.co.uk

			0782483536
71.	State House	Twesigye Robert	0772333666
72.	Makerere University Business School	Otengei Samson	0782454208
73.	Association of Uganda Tour Operators	Gloria Tumwesigye	0752868686
74.	Kampala Capital City Authority	Ronald Mubiru	0794661418
75.	Bunyoro Tourism Initiative	Apollo John Rwamparo	0779520866
76.	CICS/Ministry of Finance, Planning and Economic Development	Atuhaire Obed	0701456699
77.	Tourism Police	ASP Komuhangi	janeekomuhangi@yahoo.com
78.	Uganda Revenue Authority	Opolot Patrick	pfopolot@ura.go.ug
79.	Uganda Investment Authority	Nasur L. Modester	0781424160
80.	National Planning Authority	Othieno odoi	
81.	Ministry of Tourism, Wildlife and Antiquities	Lyazi Vivian	
82.	Ministry of Tourism, Wildlife and Antiquities	Okiror Steven Fred	
83.	Ministry of Tourism, Wildlife and Antiquities	Ojok Denis Rodney	
84.	WWF	Richard Mwesigwa	
85.	Ministry of Tourism, Wildlife and Antiquities	Tashobya Richard Wanzaarwa	
86.	Ministry of Tourism, Wildlife and Antiquities	Robert Baluku	
87.	Ministry of Tourism, Wildlife and Antiquities	Candia Leone	
88.	Uganda Wildlife Authority	Mr. Engena	
89.	UNDP	Mr. Wilson Kwamya, Leader Growth and Poverty Reduction	
90.	UNDP	Mr. Nicholas Burunde	
91.	UTB	Jackie Kuteesa	

Appendix 8: Tourism forecasts (arrivals and receipts)

Year	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Tourist Arrivals ('000)	467	538	642	842	806	946	1151	1197	1206	1270	1335	1397	1455	1510	1561	1609
	467	538	642	842	806	946	1151	1197	1206	1328	1418	1508	1598	1688	1779	1869
International Receipts (million USD)	354	377	448	589	572	662	805	834	979	975	1,044	1,113	1,182	1,251	1,320	1,388
Leisure visitors ('000)	9	30	140	144	126	149	76	224	188	198	217	237	257	276	296	315
	9	30	140	144	126	149	76	224	188	219	238	258	277	297	317	336
Yearly receipts (million USD)	11	36	170	174	153	180	92	271	228	265	288	312	336	360	383	407
Business visitors ('000)	31	72	110	163	167	184	160	210	296	268	295	322	348	375	401	428
	31	72	110	163	167	184	160	210	296	288	314	341	367	394	421	447
Yearly receipts (million USD)	27	63	96	142	145	160	139	183	258	251	274	297	320	343	366	390

Appendix 9: The Celes International Consulting Team

Expert	Title
Celestine Katongole	Team Leader
Geoffrey Bakunda, PhD	Sector diagnostic and investment planning Specialist
Thomas Frederic, PhD	Tourism Economist and development planning specialist
Wilber M. Ahebwa, PhD	Tourism Development Specialist
Cuthbert Baguma	Tourism Management, Marketing and Standards Specialist
Montgomery Ogwang	Public sector Finance and M&E specialist
Arthur Mugisha, PhD	Tourism Management and Conservation specialist

