

TOURISM DEVELOPMENT IN UGANDA



A ROADMAP FOR THE EMBASSY OF THE KINGDOM OF THE NETHERLANDS IN UGANDA

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1. Introduction

Especially when taking its size into account, Uganda is probably the most naturally diverse country in Africa. Whereas Kidepo Valley National Park could convincingly form the setting for future The Lion King sequels, Bwindi Impenetrable Forest could be the same for 'Gorillas in the Mist' or 'Tarzan'. When enjoying a walk on the shores of Lake Bunyonyi, it is hard to believe that on just a few hours' drive lions and leopards compete for prey. When rafting the white-water rapids of the River Nile in Jinja, one needs a very flexible imagination to realize that on less than a days' drive, large herds of cattle roam the arid lands of Karamoja in search of water. In addition to its natural riches, Uganda's population is highly proficient in English and among the most welcoming in the world. With 56 indigenous ethnic groups, Uganda is also extremely diverse in culture. Given these assets, many visitors to Uganda feel they are experiencing Africa at its finest. It would therefore make sense to expect Uganda as to be flooded with tourists.

Nevertheless, the country is not yet known as a prime safari destination, especially when comparing the country to its neighbours Kenya and Tanzania. Nor has it successfully built a Rwanda-like transformational narrative of being a country that has left its troubled past behind in exchange for a bright future. In fact, to the average visitor of holiday fairs in faraway countries, Uganda unfortunately is often still the country of Idi Amin horrors, Kony 2012 and anti-gay laws.

The tourism sector in Uganda is still one in its infancy and is relatively small: 121st out of 185 in absolute size and 128th in relative size¹. Only in 2013, the Ugandan government embraced tourism as a priority sector in need of significant investments². Ever since, the sector is growing significantly. The total contribution of the sector to Uganda's GDP was 7,3% in 2017, but it is expected to have risen in 2018 with 6,0%. In 2019, Uganda is considered the 12th fastest growing tourism destination worldwide³. Uganda is also one of the youngest countries in the world and its current population of 36 million is rapidly growing. The total population figure is likely to reach over a 100 million people by 2050. Tourism could form a significant source of employment for this growing nation.

While Uganda's tourism sector is visibly growing, there is still a long way to go for it to reach its full potential. The sector is lacking in competitiveness: the Travel & Tourism Competitiveness Report 2017⁴ of the World Economic Forum ranked Uganda 106th out of 136 countries included. The country underperforms on topics such as ICT Readiness (119th), Human Resources and Labour Market (115th), Health & Hygiene (130th) Air Transport Infrastructure (121st) and Ground and Port Infrastructure (117th). Other than that, the sector is characterized by underfunding, poor branding and marketing services, low level of skills development, inadequate policy and planning mechanisms, low levels of product development, lack of a robust and comprehensive conservation program and limited quality assurance.

¹ The World Travel & Tourism Council. [Travel & Tourism Economic Impact 2018 Uganda](#).

² Vision 2040, launched in 2013. <http://npa.go.ug/wp-content/themes/npatheme/documents/vision2040.pdf>

³ <https://www.busiweek.com/uganda-named-in-top-10-improved-tourism-destinations/>

⁴ <https://www.weforum.org/reports/the-travel-tourism-competitiveness-report-2017>

Uganda offers plenty of natural and cultural splendour. Winston Churchill was probably right in coining it the Pearl of Africa - and so is the Uganda Tourism Board (UTB) in echoing this phrase time and again. But its tourism sector is currently not living up to its potential. To change this around, increased collaboration with and involvement of the private sector is essential. A roadmap for (private sector led) tourism development in Uganda would be a key step in this direction. The roadmap should guide and invite companies, regulatory and coordinating bodies and supporting funders and governments to engage themselves in concrete interventions promoting (sustainable) tourism development in Uganda. Therefore, the Embassy of the Kingdom of the Netherlands in Uganda (EKN) and the Netherlands Enterprise Agency (RVO) have invited EyeOpenerWorks (EOW) to develop such a roadmap, through a process of stakeholder consultation.

This effort is supporting the ambition of the Netherlands in general (and EKN specifically) to strengthen its bilateral cooperation with Uganda, in which the focus, parallel to the desired development of Uganda, gradually changes from aid to a broader, mutually benefiting, political, and economic and trade relationship.⁵ Uganda has a stable macroeconomic policy and a favourable medium term economic outlook. Economic growth in the coming years is expected to be at around 6%. The business climate is slowly improving and it is expected that bilateral trade will increase, with Uganda having a trade surplus with the Netherlands. In this light, the Netherlands' Multi Annual Country Strategy (MACS) 2019 - 2022 for Uganda aims to contribute to the continued development of a stable and democratic Uganda, through - among others - an enhanced trade and investment relationship. This roadmap will provide recommendations on how to enhance this relationship through interventions that both positively contribute to the development of the sector and are in line with the priorities set-out in the MACS.

To develop the roadmap, between January 31 and August 12, 2019, a team of three EOW researchers carried out a desk study and has engaged representatives of 38 tourism stakeholders in Uganda through one group discussion/workshop and thirty individual interviews. Kindly see annex 1 for an overview of all stakeholders involved, and annex 2 for the references to all sources used during the desk study. This report summarizes the most important findings of this process in five main chapters: 1) a SWOT analysis of Tourism in Uganda, 2) Identified priority areas of intervention, 3) Suggested strategic interventions and implementing organizations, 4) Support through other donors/funders, and 5) A suggested roadmap for engagement of the Dutch, especially RVO and CBI.

2. SWOT analysis

The desk study and interview sessions have informed a SWOT analysis that elaborates on the strengths, weaknesses, opportunities and threats for the tourism sector in Uganda. A summarized version of the SWOT can be found on the following two pages, highlighting the top 5 factors for each element, starting with the most significant. The more elaborate and extensive version of the SWOT, containing all factors identified and a short narrative for each of them, can be found in annex 3.

⁵ Royal Netherlands Embassy in Uganda, [Multi-Annual Country Strategy 2019 - 2022](#)

Strengths	Weaknesses
<ol style="list-style-type: none"> 1. <i>Presence of both mountain gorillas and savanna animals</i> Besides DRC and Rwanda, there are no other countries with mountain gorillas. And in comparison to those two, Uganda has much more to offer in terms of conventional safari wildlife, such as lions, elephants, zebras, giraffes and leopards. 2. <i>Natural Diversity</i> From the chilly mountainous lakes of the southwest to the hot and arid zones of Karamoja: Uganda is extremely rich in landscapes, climates, animals and plants. 3. <i>Peacefulness, relative safety for tourists and absence of violence</i> Even though many people still think of the horrors of Idi Amin or the LRA era, Uganda is largely a peaceful country. 4. <i>Relatively small distances between destinations</i> Uganda is relatively modest in size, as it's comparable to the UK. With Kampala (as well as Entebbe airport) located somehow in the middle, it is conveniently located. Now that the roads have significantly improved over the last few years, every single destination is reachable by road from Kampala within a day, albeit a long one. 5. <i>English proficiency</i> The many local languages aside, English is widespread throughout the country. In 2017, Uganda was named by the World Linguistic Society as Africa's best in English speaking. English is the language per se for the Ugandan tourism industry and it is sometimes more difficult to find people who don't speak English than the other way around. However, misunderstanding the Ugandan accent may lead to some funny situations. 	<ol style="list-style-type: none"> 1. <i>Overreliance on the presence of gorillas</i> The Ugandan tourism sector relies on the presence of mountain gorillas. As other national parks and wildlife reserves are partly financed by the gorilla revenues, the sector depends on the stream of tourists visiting the gorillas. Although the number of gorillas is rising, their situation remains a precarious, especially with the instability in Eastern DRC just a stone's throw away. 2. <i>Inadequate marketing of the country (unfavourable reputation)</i> Both Uganda as a whole, as well as individual products are poorly marketed. The responsibility for tourism destination marketing lies within the mandate of UTB, which until now has failed to engage in effective marketing up to date. In the 2013 Uganda Development Masterplan mentions: "The country faces a poor destination image (...). Uganda's tourism brand is weak, lacks a clear identity and is barely recognized outside her borders." 3. <i>Lack of skills/quality human resources</i> The Ugandan tourism sector lacks qualified human resources, both for low-level jobs as well as management positions. In interviews with stakeholders, unprofessional attitudes and lack of customer care are mentioned as important issues on lower levels, whereas disloyalty, corruption and a lack of various technical skills are mentioned for the management level. 4. <i>Poor road conditions on strategic stretches</i> Although many roads have significantly improved over the last few years, some roads toward important tourist destinations are still in bad condition. Particularly the southern access road to Bwindi NP is in bad shape. Especially since Bwindi's gorillas are crucial to the economy, it can have large implications when tourist movements toward the park is blocked for several days because of landslides during rainy season. Also, the roads connecting Murchison Falls to Fort Portal are in bad shape, while linking two of the most important tourist destinations. Finally, the road linking Kitgum to Kidepo is important for the development of the latter as a prime tourist destination, but is still in very poor condition. 5. <i>Lack of proper (mid-range) accommodation</i> Near many national parks, particularly Kidepo NP, there is a lack of proper accommodation to live up to the rising number of tourists. Especially the midrange sector (of \$50-100 per night, according to standards the Ministry of Tourism) is under capacitated and value for money is considered poor.

Opportunities	Threats
<ol style="list-style-type: none"> 1. <i>Persisting overall growth of various tourism figures</i> Tourism is growing: worldwide, in Africa and in Uganda specifically. These growing numbers includes, among others: the overall number of visitors, employment possibilities and share of the GDP. This growth is not expected to slow down anytime soon. 2. <i>Recognition of Uganda as a must-visit tourism destination in international media</i> Uganda's tourist potential is receiving increased international recognition. Already in 2012, Lonely Planet picked Uganda as the best country to visit, and now other important media have also focused on Uganda. In 2017, CNN mentioned Kidepo NP as the third best park in Africa, while also in 2017, Rough Guides called Uganda the fourth best place to visit. 3. <i>Improving road conditions throughout the country</i> Over the last few years, Ugandan roads have improved significantly. Paved and well-maintained roads now link Kampala to most of the major cities and tourist destination in Uganda. Quite symbolic, it is now possible to reach Kidepo Valley NP and other parts of Karamoja within a day (although a long one). 4. <i>Eastern Loop itinerary development</i> As an alternative to Uganda's western tourism loop, which follows Entebbe, Lake Mburo, Lake Bunyonyi, Bwindi, Queen Elizabeth, Kibale Forest and Fort Portal, an eastern loop is emerging, which roughly follows Jinja, Sipi Falls, Kidepo, Murchison Falls. At the time of writing, this itinerary cannot compete with the western loop in terms of accommodation, food and product development. As Uganda currently relies largely on the western loop, developing the eastern loop is promising. As tourist numbers rise, there are a lot of opportunities. 5. <i>Growth of adventure and cultural tourism</i> Adventure tourism is the fastest growing niche in the world, according to a study of UNWTO and the Adventure Travel Trade Association (ATTA). Although the report based these conclusions on numbers in Europe, North America and South America, it is safe to say that adventure tourism is rapidly growing in Africa as well. Uganda has great potential for this market, as there are possibilities for white water rafting, hiking, mountain biking and many other outdoor sports. 	<ol style="list-style-type: none"> 1. <i>External threats to safety and health (Ebola, abductions)</i> In June 2019 the Ebola outbreak in DRC reached Uganda again as, at the time of writing, three cases of Ebola have been registered in Kasese district. Uganda has had a long time to prepare for the outbreak to reach Uganda, and has gained experience in dealing with the virus both in 2000-2001, 2007-2008 and 2012. However, it does pose a threat to the sector, regardless of whether it will spread widely or not. 2. <i>Deforestation, habitat destruction and the effects of climate change</i> Deforestation, habitat destruction and climate change pose a significant threat to the precarious ecosystems of Uganda, both in and outside the protected areas. As tourism in Uganda is focused on nature, the effects of climate change, deforestation and habitat destruction on tourism will be tremendous. 3. <i>Pressures related to population growth</i> While the Ugandan population consists of 36 million at the moment, it may reach 55 million by 2025 and it is expected to reach 100 million by 2050. Uganda has the fourth youngest population in the world, with a median age of only 15.9. At this moment, most Ugandans are small-scale farmers or rely on their food production. This poses a severe threat to the tourism sector, as the population is likely to demand a larger share of the land area for farmland, leading to less room for national parks and increasing human-wildlife conflicts and illegal encroachment. 4. <i>The exploration of oil reserves in protected areas</i> In the last decade Uganda's oil reserves have been explored and exploitation is underway. However, most of these reserves are in or nearby national parks, particularly Murchison Falls and Kabwoya Wildlife Reserve. The drilling and placing of an oil pipeline has the potential to dangerously impact the ecosystems of these parks. 5. <i>Fierce competition of Kenya, Tanzania and Rwanda</i> Uganda borders Kenya, Tanzania and Rwanda: countries that pose severe competition to Uganda as a tourism destination. Rather than on their tourist potential, these countries outperform Uganda particularly in their marketing strategy, product development and branding. The Ugandan tourism sector is much younger than the ones in Kenya and Tanzania, partly because of the political turmoil in the 1970s and 80s.

In addition to these factors for the tourism sector in Uganda in general, a number of strengths, weaknesses, opportunities and threats can be identified that more specifically relate to the involvement of the Netherlands in this area. The most significant factors in this regard are presented in the below overview.

<i>Strengths</i>	<i>Weaknesses</i>
<ol style="list-style-type: none"> 1. Presence of <i>various private sector players</i> in Ugandan tourism with <i>Dutch roots and links</i>. They all have expressed commitment to help develop the sector to such an extent that goes beyond their immediate benefit. 2. Many of these Dutch private sector players in Uganda have made <i>great contributions to developing the sector</i>, by - among others - developing mid-range accommodation, introducing a quality self-drive holiday concept and promoting Uganda as a travel destination 3. Many of the Dutch private sector players active in the Ugandan tourism sector are familiar with <i>CSR principles and practices</i> and are (relatively) keen to adhere to them. 	<ol style="list-style-type: none"> 1. <i>Weak presence of Uganda</i> in the mainstream tourism market in the Netherlands. Countries like Kenya or Tanzania are still the more obvious safari destinations in East Africa. 2. Internationally, <i>the Netherlands have not been a front runner</i> in the field of hospitality. Some other European countries have a longer tradition and more expertise in hospitality in - especially - upmarket segments.
<i>Opportunities</i>	<i>Threats</i>
<ol style="list-style-type: none"> 1. Willingness among Dutch tourists to enjoy <i>more adventurous, off-the-beaten track forms of tourism</i>. As such, they are easily motivated to make use of relatively new services and tourism products. 2. The availability of expertise and experience with interventions that can help to make the tourism sector more <i>sustainable</i>, particularly when it comes to transportation and logistics. 3. The current <i>aid & trade</i> agenda of the Dutch government, wherein the private sector plays an important role in the development agenda. The Dutch government has deployed various instruments that can assist in boosting the tourism sector through private sector development. 4. The Dutch tourism sector is <i>tech-savvy</i>. Several Dutch service providers could help Ugandan partners to boost their capacity in this regard. 	<ol style="list-style-type: none"> 1. Some of the difficulties that come with investing in Uganda, such as the <i>bureaucracies and the expensive work permits</i> have led to frustration and lack of enthusiasm for more investment among various Dutch investors and private sector players. 2. Dutch private sector players are <i>frustrated by the lack of interest</i> they perceive at the Ministry of Tourism and Wildlife, and UTB to really drive the development of the sector effectively. Particularly the lack of effective marketing of Uganda as a destination and the heavy taxes pose a threat to their willingness to support sector development initiatives. 3. Increased consciousness among Dutch travellers when it comes to plane holidays. Many people in the Netherlands <i>are inclined to fly less</i>, which - in the long term - could affect the demand for holidays in Uganda.

3. Priority areas

Tourism development

Over the years it has proven to be quite a challenge to translate an elaborate (SWOT) analysis of tourism in Uganda into a tangible and focused action plan that supports the development of the sector. The first National Development Plan (2010/11 - 2014/15) for Tourism was built around a list of 16 strategies and no less than 76 interventions.⁶

In the Uganda National Tourism Sector Development Plan (2015/16 - 2019/20)⁷, which is built around the aspirations of the National Development Plan II, this list is further narrowed down to five priority areas. Since this plan is still the most recent government planning document, and the document that provides most focus in terms of strategic themes, we have used this list of five to group and prioritize the different strategic interventions harvested during the consultations with all involved stakeholders. This resulted in the following list of areas, starting with the area most frequently mentioned as a priority and ending with the area most frequently mentioned as a priority.

1. Human Resources Development
2. Tourism Product Development
3. Marketing and promotion
4. Tourism Management and Regulation
5. Natural and Cultural Heritage Conservation

The order presented above does not imply that the area of ‘Natural and Cultural Heritage Conservation’ is not regarded as a relevant area of intervention for the involved stakeholders, but it does signify that it is not the first theme that comes to their mind when creating a roadmap for (private-sector led) tourism development in Uganda.

Sustainable Trade and Investment

The Dutch sustainable trade and investment ambition for Uganda is to create entry opportunities for Dutch companies, to support already present Dutch companies to expand their business and to strengthen local SME’s to increase their access to affordable financing and make them potentially interesting partners to Dutch businesses. Sustainability and Corporate Social Responsibility are integral part of this ambition.

In this light, the Dutch government will focus on only a limited number of issues hampering both Dutch and Ugandan SME’s doing business in Uganda. The Dutch government believes the limited resources should not be spread too thinly, to increase our chances of addressing these issues successfully, and has therefore prioritized the following themes:

- Enhancing Dutch-Ugandan Trade and Investment
- Strengthening local SME to become investment-ready partners for Dutch companies
- Improving the business climate for Dutch and Ugandan companies
- Enhancing Corporate Social Responsibility among (Dutch) companies

These themes will be taken into consideration when further defining a roadmap for Dutch engagement in chapter six.

⁶ Spenceley, Dr. A. (2018)

⁷ Ministry of Tourism, Wildlife and Antiquities (2015)

4. Strategic interventions

In the interviews and group discussion participants were not only invited to identify priority areas for tourism development, but they were also challenged to concretize these priorities into strategic interventions. These strategic interventions could be initiatives that are/were already ongoing, but also actions that are still to be initiated.

Some observations that were noted during this exercise:

- Most of the involved stakeholders came up with their list of priority themes and challenges quite easily, coming up with examples of tangible strategic interventions was more of a challenge to many of them, and providing examples of ongoing, successful initiatives proved to be even harder. This has resulted in an overview of suggested strategic interventions, where which most of them will require further operationalization before moving on to the stages of planning and implementation.
- Many of the involved stakeholders appear to be very pragmatic/responsive when discussing potential strategic interventions. They are open to develop, participate in or even lead an intervention, but often do not yet have very specific plans of actions or proposals for these interventions that can easily be shared.
- In the cases where more tangible strategic interventions were mentioned (e.g. building the capacity of UHTTI, current investment options in national parks identified by UWA, prioritized 'tourism roads' by UNRA) it has been a challenge to get access to more specific information about these suggested actions. The websites of the institutions mentioned do not provide more details and follow-up emails and calls to respondents often remained unanswered.
- Most of the relevant government institutions involved in tourism (MoTWA, UTB, UWA) have developed more detailed action plans, but are structurally underfunded. They welcome any type of support that supports the actualization of their agenda.
- The majority of the involved stakeholders is based in Uganda and operates from Uganda. The dominant perspective on (private sector led) tourism development in this study is therefore the Ugandan perspective. Little attention has been paid to a comparison of these perspectives with those of representatives that could speak on behalf of the international clients/markets and their demands.
- The tourism industry in Uganda is public sector led and private sector driven. In the view of many of the private sector representatives however, a large part of the initiatives undertaken by the public sector to 'lead' the industry how yielded little result. In their suggested strategic interventions, they therefore tend to favour private sector-led initiatives over public sector coordinated alternatives.

An overview of all suggested strategic interventions, clustered per priority area, can be found in Annex 4. On the following page, for each of the areas, three key strategic interventions are highlighted. These interventions have been prioritized based on a number of criteria including the number of times they were mentioned by various stakeholders, their potential impact on the sector, and their feasibility (a.o. availability of one or more capable potential partner(s) able and willing to lead implementation). On the subsequent pages more information is provided for each priority strategic intervention, consisting of a brief introduction, the expected impact and suggested implementing partners.

Overview of key strategic interventions per priority area

1. Human Resources Development

- In-service training for current tourism professionals, e.g. hospitality staff, lodge managers, driver guides, site guides, tour consultants
- Capacity building of existing training institutions (quality curricula and ToTs)
- Update Directorate Industrial Training's (DIT) Assessment and Training Packages

2. Tourism Product Development

- Incubation support to develop innovative tourism products (cultural tourism, adventure & sports tourism, coffee tourism)
- Develop infrastructure (e.g. roads) to improve transport to and within national parks and touristic hotspots
- Promote the development of proper (mid-range) accommodation in strategic national parks and touristic hotspots

3. Marketing and promotion

- Brand activation of Uganda 'The Pearl of Africa', incl. digital/online strategy
- Improve online presence and marketing of private sector players
- Creating market linkages (trade missions / trade show participation)

4. Tourism Management and Regulation

- Sustainability certification
- Capacity building of tour operators (operational management, budgeting, etc.)
- Inception of a national tourism coordination platform to convene relevant government institutions and key private sector bodies

5. Natural and Cultural Heritage Conservation

- Promote investment in identified investment opportunities in national parks, such as lodging, canopy walks, ziplining, kayaking, etc.
- Invest in non-commercial tourism facilities in the park (visitor centres, trails, fencing)
- Promote usage of solar appliances at hotels, lodges and transport providers

1. Human Resources Development

1.1. *In-service training for current tourism professionals (continuous professional dev.)*

The Ugandan tourism and hospitality sector already employs a large amount of people that often have few alternatives for employment. However, many of these employees are poorly skilled, earn little and have no prospects for career-making. Yet there is a high demand for skilled labour in the sector. That is why skills development may not only help unemployed people to find a job, it can as well support people already working in the sector to get jobs on a higher level. In addition, it is instrumental for the quality of service provided in the sector and as such, the competitiveness of Uganda's tourism sector at large. Short, targeted in-service training programs are suggested to build the capacity of hospitality staff, hotel and lodge managers, driver-guides, site-guides, and tour consultants, among others. In these programs it is suggested to pay special attention to women and youth, since they often experience additional challenges when building a career in tourism and hospitality. Training topics that should be addressed include customer service, foreign languages, conservation, product and market knowledge, product development, (online) marketing and (financial) management. For part of the in-service training it can be worthwhile to look at the various regional private sector-led tourism platforms and training initiatives that have emerged over the past years, since certain training needs are very context specific. The idea of making use of mobile training centres (as also mentioned in the Tourism Development Masterplan) could very well fit with this regional approach, offering quality short-term courses at properly equipped facilities.

Impact: Employees in Ugandan tourism and hospitality businesses improve their own skills level and - at the same time - the competitiveness of the sector.

Implementing partners: UTA (and its members), EOW, PUM, Rwenzori Tourism Academy, Karamoja Tourism Academy, Sebei Tourism Development Platform, Safarisharing.com

1.2. *Capacity building of existing training institutions (quality curricula and ToTs)*

Based a report from 2013⁸, Uganda has 32 institutions conducting tourism and hospitality education and training. Of these, nine are public institutions and 23 are run by the private sector. Private sector players generally rank the quality of the courses at these institutions as poor. They work with curricula that are outdated, do not reflect sector needs and put an emphasis on theory. Next to this they often lack suitably educated and prepared training staff to deliver international standard teaching and learning. A capacity building program for these training institutions that would focus on developing quality curricula and teaching aids, complemented with a training of trainers to improve didactical skills of teaching staff could make a difference in this regard.

Impact: Ugandan institutions conducting tourism and hospitality courses improve their level of training, which positively impacts the skills level of their graduates.

Implementing partners: UTB, UTA, HTTI Jinja, DIT, Mango Tree, EOW, PUM, private sector

⁸ UNDP, Assessment of the Tourism Human Resource Capacity in Uganda, 2013

1.3. Update Directorate Industrial Training's Assessment and Training Packages

In Uganda, the Directorate of Industrial Training (DIT) is the quality assurance body for any Business, Technical Vocational, Education Training (BTJET) programme. Among others, DIT develops occupational standards and awards certificates that acknowledge individuals for attaining a certain skill. However, the occupational standards and Assessment and Training Packages (ATPs) that are used by DIT to assess tourism and hospitality related programs are all outdated. Updating them would improve the relevance of DIT certificates and boost the recognition of marketable skills.

Impact: improved relevance of the Ugandan certification mechanism for tourism and hospitality related skills.

Implementing partners: MoTWA, DIT, UTB, UTA, private sector

2. Tourism Product Development

2.1. Incubation support to develop innovative tourism products

Tourism products are a combination of what tourists do on site and the services they use. The Ugandan tourism sector is lacking proper product development, which results in overdependency on those tourism products that are well-developed: visiting the gorillas, going for a game drive in the savannah parks or rafting in Jinja. A wider range of high-quality tourism products would be beneficial to the entire sector. Tourism product development should reflect the unique attributes of the destination and have the support of the host community. Also, it should be different from competitors and be of enough scale to make a significant economic contribution. Concepts that have been mentioned as tourism products with potential added value in the sector include cultural tourism (Karamoja, Sebei, Ankole), adventure & sports tourism (running, cycling, hiking, motorbike tours), and coffee tourism. Several initiatives and companies have emerged in these niches, but many of them struggle with initial fundraising, the legal set-up, building the product marketing the offer and increasing its visibility. An incubation program for selected entrepreneurs could support them in overcoming these challenges.

Impact: A higher number of well-developed tourism products, improving diversification of the tourism landscape and the competitiveness of the sector.

Implementing partners: UTA, Gorilla Highlands, Kara Tunga, Home of Friends Guesthouse, Matoke Tours, Red Dirt Mountainbike Centre, Safarisharing.com, UG-MOTOBIKE, EOW, PUM

2.2. Develop infrastructure (roads) to improve transport to and within national parks

Good roads are important for tourism, especially in Uganda, since they are the major means of transport used. Unfortunately, many important roads are still of low quality, affecting the tourist experience. Insufficient quality of transport within the country is still one of the main causes of dissatisfaction cited by international tourists visiting Uganda. In Uganda, roads outside of the park areas that facilitate access to and between

parks and other tourist sites are a responsibility of the Uganda National Roads Authority. Within the protected areas the Uganda Wildlife Authority is responsible for most of the infrastructure. Both UNRA and UWA have identified a number of ‘priority tourism roads’ that urgently need improvement (e.g. to and around Kidepo Valley National Park, around Bwindi Impenetrable Forest, and around Mgahinga National Park). Supporting the upgrade of these sections would benefit the sector at large.

Impact: An improved visitor experience of tourists visiting Uganda, enjoying an integrated comprehensive circuit around the country.

Implementing partners: UWA, UNRA, MoFPED, MoTW

2.3. Promote the development of proper (mid-range) accommodation at strategic spots

Accurate and comprehensive information about accommodation options throughout Uganda is lacking, but most of the respondents in our roadmap development process state that a shortage of proper accommodation is affecting the growth of tourism in and around strategic national parks and touristic hotspots. Especially rooms in the mid-range segment are lacking. Uganda is relatively well covered with accommodation at the high-end, and also with plenty rooms in the lower end/budget bracket, but mid-market, value-for-money accommodation options are limited. When Uganda aims to compete successfully with its neighbours, a full range of accommodation options should be available to the market throughout the country. One of the main obstacles that keep investors (both Ugandan and foreign) from developing proper accommodation is the access to, and cost of finance. According to the World Bank, the lending interest rate in Uganda was reported at 21.28 % in 2017. Such rates make it very hard for investors to attract the capital required for the development of accommodation. Funds that are able and willing to invest in the development of hotels and lodges in Uganda at more favourable rates could make a big difference in this regard.

Impact: Availability of a variety of accommodation options throughout the country, allowing Uganda as a destination to cater for different market segments.

Implementing partners: UHOA, UWA, UTB, private sector (Matoke Tours, Kara Tunga)

3. Marketing and promotion

3.1. Brand activation of Uganda ‘The Pearl of Africa’, incl. digital/online strategy

The advertising of Uganda as a brand to international markets has been lacking. Many potential tourists still look at Uganda as a country of war and dictatorial leadership. Up to now, UTB - as the official government organization with the responsibility to market all tourism products and services in the country - has failed to rub off this negative image. Its new leadership however - appointed early 2019 - has great ambitions in this regard. Using the “Pearl of Africa” catchphrase as a central component, UTB is currently developing a proper brand and package to market Uganda as a tourism destination. After developing the brand, there’s need for brand activation, a mix of marketing activities aimed at building an emotional connection between the brand and the potential tourist. The planning and implementation of this mix could benefit from some external support,

especially the online and social media component. UTBs social media channels are showing relatively low levels of activity and engagement is low.

Impact: An improved and activated tourism brand for Uganda, receiving recognition outside the country and creating an appeal to potential visitors.

Implementing partners: UTB, UTA, private sector

3.2. Improve online presence and marketing of private sector players

According to ADI (Adobe Digital Insights) travel industry market research in 2019⁹, 41% of the business and 60% of leisure travel arrangements are nowadays made online. Unfortunately, the presence of Ugandan tour operators and the Ugandan tourism industry at large is weak. This goes for their own homepages, their social media channels and for review and booking sites. They often don't function well, are badly written, outdated and in many cases not secure. In addition, the content presented often does not appeal to an international market. Most players themselves lack the capacity to improve their online presence. In intervention that supports Ugandan tourism companies to improve their online presence would therefore be welcomed by a number of stakeholders. Part of this effort could be channelled through the regional private sector-led tourism platforms/clusters that have started marketing initiatives to promote tourism in their respective areas.

Impact: Improved online presence of Ugandan tourism companies, allowing them to compete with service providers from other destinations and grow their business.

Implementing partners: UTA, Gorilla Highlands, Kara Tunga, STDP, EOW, PUM

3.3. Creating market linkages (trade missions / trade show participation)

Extensive marketing and promotion are needed to create awareness about Uganda's tourism products around the world. Trade fairs and exhibitions can be a very effective means in this regard. On many fairs however, Uganda is often only represented through individual international tour agencies. UTB limits its participation to only a few international trade fairs and exhibitions each year and for smaller tour operators inadequate funding and limited capacity provide challenges to their presence. A number of stakeholders plea for the Dutch government to play a role in ensuring that Uganda is adequately represented at all the relevant trade fairs in the Netherlands. This could be promoted through the provision of matching grants for interested tour operators and an induction program for trade fair participants. Intraservice BV, the official coordinator of the Vakantiebeurs in the Netherlands, can be a strategic partner in this regard. They have a solid track record of providing assistance before, during and after the fair for various international delegations.

Impact: Improved visibility of Uganda at trade fairs and exhibitions, boosting the number of leads towards potential tourists/customers.

Implementing partners: UTB, UTA, AUTO

⁹ <https://medium.com/swlh/top-10-travel-industry-trends-in-2019-d43d157de7b9>

4. Tourism Management and Regulation

4.1. *Sustainability certification*

Awareness and adoption of proper sustainable practices within the Ugandan tourism sector are generally low. Various private sector driven programs assess the sustainability of practices within tourism companies (hotels, tour operators), and play an important role in awareness-raising and sensitization. In 2019, the Association of Ugandan Tour Operators has started a collaboration with Travelife in this regard. Travelife is a training, management and certification initiative, developed by the travel industry, that works with travel businesses around the world to help them improve their social, economic and environmental impacts. If it becomes easier for Ugandan tourism companies to get access to information regarding initiatives like Travelife they will be more likely to adopting sustainable practices. A series of workshops and training sessions on sustainable practices and sustainable certification for hotels, tour operators could create an effective steppingstone in this regard.

Impact: Increased awareness and adoption of proper sustainable practices among Ugandan hotels and tour operators.

Implementing partners: UTA, UHOA, AUTO, private sector

4.2. *Capacity building of tour operators (operational management, budgeting, etc.)*

Tour operators play an important role in the tourism value chain in Uganda. However, despite being important drivers in the sector, many tour operators face challenges especially related to weak human resources capacity. Capacity building needs among tour operators and travel agencies include training in product development, operational management, computer reservation systems, budgeting and financial management. Both the Association of Uganda Tour Operators (AUTO) and Safari Sharing, the first front-to-end ecommerce platform in the African safari industry have expressed interest in initiating a programme to address these needs.

Impact: Improved capacity and organizational efficacy among Ugandan tour operators

Implementing partners: AUTO, Safari Sharing

4.3. *Inception of a national tourism coordination platform*

Many different (semi-)public institutions and private sector players have a say in guiding the tourism sector in Uganda. From a government perspective these include the Ministry of Tourism, Wildlife and Antiquities, Uganda Tourism Board (UTB), Uganda Wildlife Authority (UWA), the National Forestry Authority (NFA), the Uganda Investment Authority (UIA), Ministry of Education and Sports (MoES), Ministry of Works (MoW), the Civil Aviation Authority, the Ministry of Health (MoH), the Ministry of Finance, Planning & Economic Development (MoFPED), the Ministry of Trade, Industry and Cooperatives (MoTIC), the Uganda Police Force (UPF), the Uganda National Road Authority (UNRA) and the Uganda Bureau of Standards (UBS). There is lack of a clear mechanism and an effective platform for these stakeholders (and private sector representatives) to meet and coordinate their actions. This especially becomes clear at moments of crisis (such as the kidnapping of an

American tourist in Queen Elizabeth N.P. early 2019). Several stakeholders therefore call for the inception of a national tourism coordination platform that meets regularly and convenes relevant government institutions and key private sector bodies.

Impact: Tourism-related information spreads effectively to relevant stakeholders and cases of crisis are managed adequately.

Implementing partners: MoTWA, UTB

5. Natural and Cultural Heritage Conservation

5.1. *Promote investment in identified investment opportunities in national parks*

To support the growing tourism industry, to provide better customer services within the parks, and to raise funds for conservation UWA has identified opportunities for investment in services, products and infrastructure and accommodation facilities. There are opportunities for development of new ecotourism products and services, within and outside the national parks, by the private sector or through public-private partnerships. These include, among others, the development of lodges, luxury tented camps and cottages, nature walks, walking safaris in wilderness areas and the volcanic craters, canopy walkways, hot springs baths, and mountaineering packages for Rwenzori, Elgon and Mgahinga Mountains.

Impact: Improved customer experience within the parks, resulting in a more sustainable revenue stream for UWA's conservation work.

Implementing partners: UWA, private sector

5.2. *Invest in non-commercial tourism facilities in the park*

In many of the parks within Uganda there is a need to improve the non-commercial facilities such as the trails, fencing and visitor centres. Within the parks there is general lack of useful information about both the protected area itself and the facilities and services that can be found within its boundaries. The opportunity to provide orientation and information, as well as a focus for the sale of crafts, food, beverages and souvenirs to visitors is generally not utilized. Support to UWA to develop these non-commercial tourism facilities would enhance the experience of tourists visiting Uganda's national parks and support nature conservation.

Impact: Improved customer experience within the parks, resulting in a more sustainable revenue stream for UWA's conservation work.

Implementing partners: UWA

5.3. *Promote usage of solar appliances*

Many tourist lodges and hotels are off-grid and rely on generators or other non-sustainable sources of power. Solar power systems have the potential to cover a large share of the power needs of hotels and safari lodges but are investment heavy. An intervention that would (partly) subsidize the start-up costs of solar systems and

appliances can speed up the transition of off-grid lodges and hotels to renewable energy sources. The same is suggested for transport providers and supporting them in the transition from vehicles consuming fossil fuels to electric transport options. The latter can especially be worthwhile to explore at some of the strategic tourism hotspots and national parks.

Impact: A growing number of hotels, lodges and transport providers make use of renewable energy sources to power their business.

Implementing partners: UTA, private sector, SolarNow, RoadTrip Uganda

5. Other donors/funders

In order to assess where a Dutch contribution would add most value in actualizing a roadmap for (private sector led) tourism development in Uganda, from a perspective of donor coherence and complementarity it is important to analyse the efforts and contributions of other international funders in this playing field. The following page provides an overview of the donors and the related initiatives that we were able to identify, clustered per priority theme. More information about each initiative - when available - can be found in annex 6.

Kindly note that this is merely a first attempt to create an overview of efforts and contributions of other international funders in this field in Uganda. It is based on information that the EOW team has been able to find online, through our desk study and through references of the engaged stakeholders. It serves to provide an impression of the engagement of other donors and funders but does not claim to be fully complete - covering all external support to tourism development in Uganda.

A complicating factor in this regard is the fact that many interventions of international funders do not specifically target tourism but are set-up as more general actions that wherein tourism is only one of several sectors of engagement. Actions like the Skills Development Fund, U-LEARN II and the Competitiveness and Enterprise Development Project are examples of such interventions. Most likely several other more general interventions that are open to tourism could be included in this overview, but team has only mentioned those more general interventions if specifically referred to by one of the stakeholders involved.

Lastly, the agenda of nature conservation in Uganda is driven by a variety of civil society organisations, including the Worldwide Fund for Nature (WWF Uganda), EcoTrust, Nature Uganda (NU), Wildlife Clubs of Uganda (WCU), Uganda Wildlife Society (UWS), Wildlife Conservation Society (WCS), Uganda Conservation Foundation (UCF), Africa Wildlife Foundation (AWF), International Gorilla Conservation Program (IGCP), The Gorilla Organization (GO), Jane Goodall Institute (JGI), Ngamba Chimpanzee Sanctuary and Wildlife Conservation Trust (CSWCT), and Rhino Fund Uganda. The team has noted their presence, but not looked into their work more in detail, because none of their actions was mentioned in our stakeholder consultations.

Overview of contributions of other donors/funders related to tourism development in Uganda per priority area

Donor/funder	Project title	Implementing agencies	Status
<i>1. Human Resources Development</i>			
Booking Cares	Ukarimu - setting the standard for hospitality training	Mango Tree, EOW	Ongoing
European Union Trust Fund	Skills Development Fund - Northern Uganda / Kiryandongo	ENABEL	Ongoing
Irish Aid	Skills Development Fund - Karamoja	ENABEL	Ongoing
the Belgian Government	Skills Development Fund - Albertine / Rwenzori	ENABEL	Ongoing
MasterCard Foundation	U-LEARN II	SwissContact	Ongoing
Ministry of Gender, Labour & Social Development	Apprenticeship program in, among others, tourism	MoLGSD, other Ministries	Ongoing
USAID	'HIV AIDS awareness and prevention program'	RTI, UHOA	Completed
World Bank	Skills Development Facility	PSFU, MoFPED	Ongoing
World Bank	Re-development and upgrading of the Uganda Hotel and Tourism Training Institute and Crested Crane Hotel	UHTTI, MoTWA	Ongoing
<i>2. Tourism Product Development</i>			
USAID	STAR	USFS International, UWA	Ongoing
UNDP	Innovation Challenge Award	Private sector	Completed
European Union	Green Economy Investment Fund for SMEs	UDB	In preparation
<i>3. Marketing and promotion</i>			
World Bank	Competitiveness and Enterprise Development Project	PSFU, private sector	Ongoing
<i>4. Tourism Management and Regulation</i>			
DFID, TradeMark East Africa	Strategic plan development for tourism associations	UTA	Completed
DFID, World Bank	Uganda Tourism Status Report	MoTWA, UBOS	Completed
European Union	Greening the Tourism Sector in Uganda	Fundacion Gaiker, UTA	Ongoing
NOREC	Community Based Tourism Businesses Support Programme	UCOTA	Closing
UNDP	Improving Policies and Regulations to Support Development of Markets in Tourism	MoTWA	Completed
World Bank	Capacity building support	MoTWA	Ongoing
<i>5. Natural and Cultural Heritage Conservation</i>			
the Chinese Embassy	Donation of laptops to UWA	UWA	Completed
European Union	Support of the Protection of Historical Buildings in Kampala, Jinja and Entebbe	Cross-Cultural Foundation	Completed
USAID	Uganda Tourism for Biodiversity Program	African Wildlife Foundation	Completed

6. A roadmap for Dutch engagement

When further analysing the overview of key strategic interventions presented in chapter five from a perspective of Dutch engagement, two questions are key: 1) ‘Via which interventions could a Dutch contribution add most value to the development of tourism in Uganda?’, and 2) ‘How do these interventions relate to the Dutch priority themes and strategies for Sustainable Trade and Investment as described in the Netherlands’ Multi Annual Country Strategy (MACS) 2019 - 2022 for Uganda?’.

The Dutch agenda for Sustainable Trade and Investment in Uganda

In line with the time horizon of the Sustainable Development Goals, the long term goal of The Netherlands and is to support Uganda towards inclusive, effective and sustainable governance and development, which improves the prospects for all Ugandans and which is heading towards middle-income status, while playing a stabilizing role in the region. From a Trade and Investment perspective this implies increasing Dutch-Ugandan investments and trade that is socially and environmentally responsible and contributing to inclusive growth. The Embassy of the Kingdom of the Netherlands (EKN) therefore aims *to enhance the Dutch-Ugandan Trade and Investment, to strengthen local SME’s to become investment and technology-ready and potential partners for Dutch companies and to improve the business climate for Dutch and Ugandan companies*. Furthermore, EKN, together with other partners *strives to enhance corporate social responsibility*. In all this, EKN focuses on priority sectors that present business and investment opportunities for the Dutch. One of these priority sectors is tourism.

Key actors

For a translation of the Dutch agenda for Sustainable Trade and Investment in Uganda into specific interventions for the tourism and hospitality sector - next to all the relevant Ugandan stakeholders mentioned in the previous chapters - it is important to take three following actors into account: 1) Dutch-owned or Dutch-linked private sector in tourism, 2) The Netherlands Enterprise Agency (RVO), and 3) Centre for the Promotion of Imports from developing countries (CBI).

Dutch-owned or Dutch-linked private sector in tourism

Several tourism companies in Uganda are Dutch owned or have a Dutch link. They range from accommodation providers and bike-rental companies to tour operators and training providers and include the likes of Banda Island, Nile It, BikeVentures, Charlie’s Travels, EyeOpenerWorks, Home of Friends Guesthouse, ICU Guesthouse, Kara Tunga, Kazinga Tours, Mango Tree, Matoke Tours, Red Dirt Mountainbike Centre, Roadtrip Uganda, Safarisharing.com, Swanair Travel and UG-MOTOBIKE. These businesses are not organized in one separate entity, but many of them are active members of NUTIP and/or one of the relevant private sector associations. There is a strong interest among most of them to be involved in one or several of the key strategic interventions mentioned in this report, and a few have even indicated to be willing to lead the implementation of certain actions.

The Netherlands Enterprise Agency (RVO)

RVO stimulates entrepreneurs in sustainable, agricultural, innovative and international business. It aims to improve opportunities for entrepreneurs, strengthen their position and

help them realise their international ambitions with funding, networking, know-how and compliance with laws and regulations. RVO runs several programmes and has different funds and grant schemes available to support various business initiatives. These funds and grant schemes include the Dutch Good Growth Fund (DGGF), Develop2Build (D2B), Development Related Infrastructure Investment Vehicle (DRIVE), Partners for International Business (PIB), and PSD Apps (e.g. and Impact Cluster).

Centre for the Promotion of Imports from developing countries (CBI)

CBI is a specific part of the Netherlands Enterprise Agency, funded by the Netherlands Ministry of Foreign Affairs. The mission of CBI is to connect Small and Medium Sized Enterprises (SMEs) in developing countries to the European market and thereby contribute to sustainable and inclusive economic growth. CBI does so by implementing 3-5-year projects in a specific export value chain (VC) in a specific county, focusing on seizing opportunities for exports to Europe and tackling obstacles that hamper or hinder these exports. CBI projects are integrated, meaning they involve both SME exporters and the export enabling environment.

Currently CBI is exploring the possibilities of initiating a project aimed at strengthening tourism in Uganda. Given the expertise of CBI, when looking into a tourism related project, the focus of the organization in most cases has been on Tour Operators (TOs) as the linking pins in the value chain. The purpose of a possible future CBI project in Uganda would therefore be to support 15-25 Ugandan TOs, as well as actors in the supporting institutional environment (public and/or private organizations), in offering a more diversified and sustainable tourism product that fits European demand.

Core themes would be:

- Developing a more diversified Ugandan tourism product offer to attract higher numbers of European travellers.
- Improving the efficient organization of the sector and levels of trust between stakeholders.
- Improving the tourism product and reduce CSR risks in the value chain.

Priority interventions

After an analysis of the key strategic interventions suggested by involved stakeholders, EKN's priority themes and strategies for Sustainable Trade and Investment, and the interests of the most relevant Dutch actors, the following nine priority interventions are suggested to shape the roadmap for Dutch involvement in tourism development in Uganda:

1. In-service training program
2. Impact cluster product development
3. Capacity building of Ugandan tour-operators (incl. trade missions)
4. Joint infrastructure development
5. Activation of Uganda tourism brand
6. Curriculum development for training providers
7. Sustainability certification for tour operators
8. Tourism sector coordination and promotion
9. Promotion of Dutch investment in tourism

On the following pages these suggested nine priority interventions will be highlighted, using the following headers to describe them in more detail: introduction, expected results, tourism development field(s), implementing agencies, supporting Dutch actor/program, related intermediate outcome Sustainable Trade and Investment, related indicators.

1. In-service training program

Introduction: a national in-service training program will support people already working in the tourism sector to improve their competence and to access jobs on a higher level. This is instrumental for the quality of service provided in the sector and as such, the competitiveness of Uganda's tourism sector at large. As part of the program short, targeted in-service training programs will build the capacity of hospitality staff, hotel and lodge managers, driver-guides, and site-guides, and tour consultants, among others. Training topics that could be addressed include customer service, foreign languages, conservation, product and market knowledge, product development, (online) marketing and (financial) management.

Expected results: improved competence and performance of employees in Dutch and Ugandan tourism and hospitality businesses, leading to higher turnover and more jobs.

Tourism development field(s): Human Resources Development

Implementing agencies: UTA, supported by People1st, BUAS, EOW, PUM, private sector

Supporting Dutch actor/program: RVO (PSD Toolkit)

Related intermediate outcome(s) EKN MACS: Dutch-Ugandan Trade and Investment enhanced, Local SME strengthened to become investment and technology-ready potential partners for Dutch companies

Related indicators EKN: # of jobs created by the Dutch private sector in Uganda, # of jobs supported

2. Impact cluster tourism product development

Introduction: The Ugandan tourism sector is lacking proper product development, which results in overdependency on visiting the gorillas, going for a game drive in the savannah parks or rafting in Jinja. Developing a wider range of high-quality tourism products would be beneficial to the entire sector. Dutch companies have often been at the forefront of developing concepts with added value to the sector such as adventure & sports tourism (running, cycling, hiking, motorbike tours), cultural tourism (Karamoja, Sebei), and innovative booking systems. An impact cluster will enable them to further boost the development of these concepts, which will positively impact their business, but also the sector at large.

Expected results: a higher number of well-developed tourism products, improving diversification of the tourism landscape and the competitiveness of the sector, stronger involvement of Dutch companies in niche tourism markets in Uganda.

Tourism development field(s): Tourism Product Development

Implementing agencies: From Coach To Coach, Kara Tunga, Matoke Tours, Red Dirt Mountainbike, Roadtrip Africa, Safarisharing.com, UG-MOTOBIKE, supported by EOW, PUM

Supporting Dutch actor/program: RVO (Impact Cluster)

Related intermediate outcome(s) EKN MACS: Dutch-Ugandan Trade and Investment enhanced, Local SME strengthened to become investment and technology-ready potential partners for Dutch companies

Related indicators EKN: the size of total Dutch volume and diversity of Dutch business in Uganda, # of jobs created by the Dutch private sector in Uganda, # of jobs supported

3. Capacity building of Ugandan tour-operators (incl. trade missions)

Introduction: Tour operators play an important role in the tourism value chain in Uganda. A CBI program will enhance their capacity in product development, marketing and sales and operational management, to enable them to bring more visitors to the country. Besides training sessions in Uganda, this process could also include joint visits to relevant trade fairs, like ITB, WTM, de Vakantiebeurs or regional events.

Expected results: improved organizational efficacy among Ugandan tour operators, more visitors coming to Uganda from Europe in general and the Netherlands specifically

Tourism development field(s): Marketing and promotion, Human Resources Development

Implementing agencies: AUTO

Supporting Dutch actor/program: CBI

Related intermediate outcome(s) EKN MACS: Dutch-Ugandan Trade and Investment enhanced, Local SME strengthened to become investment and technology-ready potential partners for Dutch companies

Related indicators EKN: the size of total Dutch volume and diversity of Dutch business in Uganda, # of jobs supported

4. Joint infrastructure development

Introduction: In Uganda, roads that facilitate access to and between parks and other tourist sites are a responsibility of the Uganda National Roads Authority (UNRA). Within the protected areas the Uganda Wildlife Authority is responsible for most of the infrastructure. Both UNRA and UWA have identified a number of 'priority tourism roads' that urgently need improvement. Dutch companies like Road Rapid can offer valuable support to such improvements, either hired by UNRA or UWA directly or supported by instruments like DRIVE and D2B. EKN is perfectly positioned to play a matchmaking and catalysing role in such a process.

Expected results: improved accessibility of tourist sites, an enhanced visitor experience, and more involvement of Dutch companies in infrastructure development in Uganda

Tourism development field(s): Tourism Product Development

Implementing agencies: UNRA, MoFPED, UWA, Road Rapid

Supporting Dutch actor/program: RVO (DRIVE, D2B)

Related intermediate outcome(s) EKN MACS: Dutch-Ugandan Trade and Investment enhanced, Improved business climate for Dutch and Ugandan companies

Related indicators EKN: the size of total Dutch volume and diversity of Dutch business in Uganda, # of supported Dutch interventions in the local business environment for private sector development, # of projects that can be developed and tendered based on value for money principles

5. Activation of Uganda tourism brand

Introduction: Using the “Pearl of Africa” catchphrase as a central component, UTB is currently developing a brand and package to market Uganda as a tourism destination. After developing the brand, there’s need for brand activation, a mix of marketing activities. The planning and implementation of this mix, and especially the online and social media component, could benefit from some external support. Based on experiences in other countries, CBI is in a good position to provide advice and guidance in this regard, specifically on topics like digital marketing, website development, social media strategy and stakeholder database development.

Expected results: an improved and activated tourism brand for Uganda, receiving recognition outside the country and creating an appeal to potential visitors, leading to more people annually visiting the country and an increased number of jobs.

Tourism development field(s): Marketing and promotion

Implementing agencies: UTB, UTA, supported by private sector

Supporting Dutch actor/program: CBI

Related intermediate outcome(s) EKN MACS: Local SME strengthened to become investment and technology-ready potential partners for Dutch companies

Related indicators EKN: # of jobs supported

6. Curriculum development for training providers

Introduction: The quality of tourism and hospitality education and training is generally ranked as poor. Course providers work with curricula that are outdated, do not reflect sector needs and put an emphasis on theory. This project would work with relevant Ugandan training providers supported by Dutch experts to develop quality curricula and teaching aids, complemented with a training of trainers to improve didactical skills of selected teaching staff.

Expected results: Ugandan institutions conducting tourism and hospitality courses improve their level of training, which positively impacts the skills level of their graduates, and improved competence and performance of employees in Dutch and Ugandan tourism and hospitality businesses, leading to higher turnover and more jobs

Tourism development field(s): Human Resources Development

Implementing agencies: UTA, USAGA, UHOA, Rwenzori Tourism Academy, Karamoja Tourism Academy, supported Mango Tree, EOW, PUM, BUAS

Supporting Dutch actor/program: CBI

Related intermediate outcome(s) EKN MACS: Dutch-Ugandan Trade and Investment enhanced, Local SME strengthened to become investment and technology-ready potential partners for Dutch companies

Related indicators EKN: # of jobs created by the Dutch private sector in Uganda, # of jobs supported

7. Sustainability certification for tour operators

Introduction: In 2019, the Association of Ugandan Tour Operations has started a collaboration with Travelife. Travelife is a training, management and certification initiative, developed by the travel industry, that works with travel businesses around the

world to help them improve their social, economic and environmental impacts. If it becomes easier for Ugandan tourism companies to get access to information regarding such initiatives they will be more likely to adopt sustainable practices. A series of workshops and training sessions on sustainable practices and sustainable certification for tour operators could create an effective steppingstone in this regard.

Expected results: Increased awareness and adoption of proper sustainable practices among Ugandan hotels and tour operators.

Tourism development field(s): Tourism Management and Regulation

Implementing agencies: AUTO, Travelife

Supporting Dutch actor/program: CBI

Related intermediate outcome(s) EKN MACS: Corporate Social Responsibility among (Dutch) companies enhanced

Related indicators EKN: # of Dutch companies with increased awareness and integration of international standards for CSR

8. Tourism sector coordination and promotion

Introduction: Many different (semi-)public institutions and private sector players have a say in guiding the tourism sector in Uganda. There is lack of a clear mechanism and an effective platform for these stakeholders (and private sector representatives) to meet and coordinate their actions. By supporting national tourism events that convene relevant government institutions and key private sector bodies, such as the celebration of the international day of tourism, EKN enhances sector coordination and ensures a recurring entry point to address bottlenecks in the business climate regarding tourism, which could include certain laws, regulations, or policy plans.

Expected results: tourism-related information spreads effectively to relevant stakeholders, access to a platform to address bottlenecks in the business climate regarding tourism

Tourism development field(s): Tourism Management and Regulation

Implementing agencies: MoTWA, UTB

Supporting Dutch actor/program: EKN

Related intermediate outcome(s) EKN MACS: Improved business climate for Dutch and Ugandan companies

Related indicators EKN: # of supported Dutch interventions in the local business environment for private sector development

9. Promotion of Dutch investment in tourism

Introduction: One of the main obstacles that keep investors (both Ugandan and Dutch) from investing in tourism and developing proper accommodation for instance is the access to, and cost of finance. The high interest rates make it very hard for investors to start new projects in the sector. Funds that are able and willing to invest in tourism related projects in Uganda at more favourable rates can make a big difference in this regard. In order to boost this, EKN could promote tourism as an interesting sector for investment among funds managed by the Dutch government, such as DGGF and its subsidiary local funds.

Expected results: improved access to finance for investors in tourism (both Ugandan and Dutch), increased level of investment in accommodation and tourism activities

Tourism development field(s): Tourism Product Development

Implementing agencies: private sector, BID Network, local funds (lungo, XSML)

Supporting Dutch actor/program: EKN, RVO (DGGF)

Related intermediate outcome(s) EKN MACS: Dutch-Ugandan Trade and Investment enhanced, Local SME strengthened to become investment and technology-ready potential partners for Dutch companies

Related indicators EKN: the size of total Dutch volume and diversity of Dutch business in Uganda, # of jobs created by the Dutch private sector in Uganda, # of jobs supported

Annex 1 - Consulted stakeholders

<i>Private sector</i>	<i>(semi) Public</i>
Association of Uganda Tour Operators (AUTO)	Centre for the Promotion of Imports (CBI)
Banda Island / Nile It	Delegation of the European Union to Uganda
BikeVentures	ENABEL
Charlie's Travels	Embassy of Belgium
EyeOpenerWorks	Embassy of Ireland
Gorilla Highlands	Embassy of the Kingdom of the Netherlands
Home of Friends Guesthouse	Hospitality and Tourism Sector Skill Council
ICU Guesthouse	Ministry of Finance, Planning & Economic Dev.
Kara Tunga	Ministry of Tourism, Wildlife and Antiquities
Karamoja Tourism Academy	Private Sector Foundation Uganda (PSFU)
Kazinga Tours	PUM
Mango Tree	The Netherlands Enterprise Agency (RVO)
Matoke Tours	The World Bank
Red Dirt Mountainbike Centre	Uganda National Roads Authority (UNRA)
Roadtrip Uganda	Uganda Tourism Board (UTB)
Rwenzori Tourism Academy	Uganda Wildlife Authority (UWA)
Safarisharing.com	
Swanair Travel	
Travelife	
Uganda Hotel Owners Association (UHOA)	
Uganda Safari Guides Association (USAGA)	
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Annex 3 - Elaborate SWOT analysis

<i>Strengths</i>	<i>Weaknesses</i>
<ul style="list-style-type: none"> - Natural diversity: variety in landscapes, climates, animals and plants - Comfortable weather conditions - Presence of both mountain gorillas and savanna animals - Cultural diversity - The welcoming and friendly nature of Ugandan people - English as a national language - Possibilities for adventure tourism: hiking, rafting, mountain biking, etc. - Peacefulness, relatively safe for tourists/absence of violence - Absence of overcrowding of tourists - Relatively small distances between destinations - Price competitiveness (low labour and transport costs) - Performance of the Uganda Wildlife Authority (UWA) - Private sector is organized in associations - Revenues (such as park fees) being shared with local communities 	<ul style="list-style-type: none"> - Overreliance on the presence of gorillas - Lack of cultural landmarks of international significance - Unfavourable reputation of Uganda as a whole - Inadequate marketing of the country as a tourist destination - Lack of competitiveness of the sector - Lack of skills/quality human resources, few possibilities for skilling - Mismatch between offered at training institutions and the workplace - Unwillingness of private sector players to invest in skills development - Vulnerability of staff to exploitation - Lack of skilled personnel for management positions - Expensive work permits for expatriate staff - Lack of career-making prospects in the sector - Unfavourable image of tourism sector as a place to work in - Limited resources at responsible agencies and sector associations - Lack of adequate data, quality assurance and measurement - Small percentage of visitors for leisure purposes - Lodges are often not very beneficial to the local communities - Lack of community compensation structures for human-wildlife conflicts - Corruption in society and government institutions - The 20% of park fees that is supposed to go to the local communities often does not reach the poor communities - Road conditions on strategic stretches - Kigali Airport being closer to the mountain gorillas of than Entebbe - Absence of proper accommodation near certain national parks - Lack of coordination in the tourism sector - Uganda having an LGBT-unfriendly reputation - Lack of proper public transport - Lack of electricity, phone coverage and running water near N.P.s - Weak online presence of the Ugandan tourism sector

<i>Opportunities</i>	<i>Threats</i>
<ul style="list-style-type: none"> - Persisting overall growth of various tourism figures - Recognition of Uganda as a must-visit tourism destination in international media (Lonely Planet, CNN, the Guardian, etc.) - Potential for both high end, mid-range and low-end tourism - Growing contribution of the sector to GDP and employment levels - Spill-over effect: other sectors start benefiting - Recognition of potential of MICE tourism (Meetings, conferences, incentives and exhibitions) - Domestic tourism - Improved road conditions throughout the country - Development initiatives are undertaken by the private sector - Uganda is located near other growth markets, such as Rwanda, Kenya and Tanzania - Growing numbers of wildlife in most national parks - The adventure tourism market is growing rapidly worldwide and has a lot of potential in Uganda - Potential for hiking on various mountains, spread all over the country - Lodge development near several parks - The reopening of Uganda Airlines - The African Union exploring possibilities for visa-free travelling - International hotel chains move to Uganda - Potential for coffee tourism as an emerging niche market - Eastern Loop itinerary development - Regional tourism integration - Interest from development partners and investors to support tourism development 	<ul style="list-style-type: none"> - Climate change, deforestation and habitat destruction - Pressure related to population growth - Fierce competition of Kenya, Tanzania and Rwanda as tourist destinations - Proximity to failed states and conflict areas (South Sudan, DRC) - External threats to safety and health (terrorism, Ebola outbreak) - Overreliance of tourism in Uganda on proper wildlife management - Poaching and animal-trafficking - The exploitation of oil reserves in protected areas - The potential development of a hydro-power dam at Murchison Falls - Invasive species destroying the environment, particularly in Queen Elizabeth National Park - Environmental pollution and lack of environmental awareness - Lack of protection of cultural heritage sites - The potential merge of UWA with the Ministry of Tourism - Data on tourism becomes outdated quickly - Fraudulent tour operators - The Isimba Dam and Bujagali Hydropower Dam impacting the rafting industry

STRENGTHS

Natural Diversity

From the chilly mountainous lakes of the southwest to the hot and arid zones of Karamoja: Uganda is extremely rich in landscapes, climates, animals and plants.

Comfortable weather conditions

Uganda has comfortable weather conditions for most visitors. It has two rainy seasons and two dry ones, and although there is a huge variation within the country, it is safe to say that in most parts of the country it rarely exceeds 32 degrees Celsius and hardly drops below 18 degrees Celsius.

Presence of both mountain gorillas and savanna animals

Besides DRC and Rwanda, there are no other countries with mountain gorillas. And in comparison to those two, Uganda has much more to offer in terms of conventional safari wildlife, such as lions, elephants, zebras, giraffes and leopards.

Cultural diversity

With 56 indigenous ethnic groups and 45 living languages, Uganda is an extremely diverse country in terms of culture. It lies on the border of the Bantu and Nilotic language families and most Ugandans take pride of their ethnic identity.

Welcoming people

Uganda is widely known among tourists and expats for its welcoming people. In a 2017 [InterNations survey](#) among expats worldwide, Uganda was considered the most welcoming country. According to the InterNations report, 57% of expats in Uganda gave 'general friendliness' the best possible rating (the global average was 26%).

English proficiency

The many local languages aside, English is widespread throughout the country. In 2017, Uganda was named by the World Linguistic Society as Africa's [best in English speaking](#). English is the language per se for the Ugandan tourism industry and it is sometimes more difficult to find people who don't speak English than the other way around. However, misunderstanding the Ugandan accent may lead to some funny situations.

Possibilities for adventure tourism

Uganda has huge potential in terms of adventure tourism, a niche that is [growing exponentially worldwide](#). The Rwenzori Mountains and Mount Elgon, and plenty of other mountains provide great possibilities for trekking, while the white-water rapids of the Nile near Jinja provides spectacular possibilities for rafting and kayaking. The country also offers possibilities for thrill seekers, including mountain biking and bungee jumping.

Peacefulness, relative safety for tourists and absence of violence

Even though many people still think of the horrors of Idi Amin or the LRA era, Uganda is largely a peaceful country.

Absence of overcrowding of tourists

Uganda still offers an off-the-beaten track feel, compared to other countries, which largely has to do with the density of tourists per km² in the game parks, which is just about 10% of that of Kenya or South Africa ([English & Ahebwa 2018](#)).

Relatively small distances between destinations

Uganda is relatively modest in size, as it's comparable to the UK. With Kampala (as well as Entebbe airport) located somehow in the middle, it is conveniently located. Now that the roads have significantly improved

over the last few years, every single destination is reachable by road from Kampala within a day, albeit a long one.

Price competitiveness (low labour and transport costs)

In comparison to many other countries, both inside and outside Africa, Uganda can be cheap, especially in terms of labour and transport costs. Especially unskilled labour is cheap, although this has negative consequences for the quality of service provision in the sector, as employees are often unmotivated.

Performance of the Uganda Wildlife Authority (UWA)

UWA operates autonomously and has been praised for its performance: “There are numerous examples of how it has responded in a timely fashion to address human-wildlife conflicts and introduced new policies. There is a general consensus that UWA is doing a good job ([English & Ahebwa 2018](#)).”

Private sector is organized in effective associations

Within the Ugandan tourism sector, the private sector is organized in associations. From various directions, these associations have been mentioned as effective in representing the private sector. These associations include the Association of Uganda Tour Operators ([AUTO](#)), the Uganda Hotel Owners’ Association ([UHOA](#)), the Uganda Safari Guides Association ([USAGA](#)), the Uganda Association of Travel Agents ([UGATA](#)), the Uganda Community Tourism Association ([UCOTA](#)) and the umbrella organization of these associations: the Uganda Tourism Association ([UTA](#)).

Revenues (such as park fees) being shared with local communities

In order to let the neighbouring communities benefit from tourism and to decrease the attractiveness of engaging in poaching, 20% of the park go to these communities. This should be considered a praiseworthy policy (yet, as we shall see, the practical execution is not ideal.)

WEAKNESSES

Overreliance on the presence of gorillas

The Ugandan tourism sector relies on the presence of mountain gorillas, as the permits provide a larger share of the revenue. As other national parks and wildlife reserves are financed by the gorilla revenues, the sector depends on the stream of tourists visiting the gorillas. Although the number of gorillas is rising, it remains a precarious situation, especially with the instability of Eastern DRC just a stone's throw away.

Lack of material cultural and historical landmarks of international significance

Despite Uganda's huge cultural diversity, it lacks the cultural and historical landmarks that attract large numbers of tourists. Various tombs, palaces and rock painting sites are visited by tourists, but as a sideshow at most. These are not the reasons why tourists come to Uganda.

Unfavourable reputation of Uganda as a whole

Uganda still has an unfavourable reputation outside of Africa. Many potential tourists still associate Uganda with the violence of Idi Amin and the LRA era and will therefore opt for a different country. The story of Uganda as a country of tremendous terror has not yet been replaced by an appealing story of optimism. The 2019 abduction of an American woman in Queen Elizabeth National Park is likely to damage the already mediocre image of Uganda.

Inadequate marketing of the country as a tourist destination

This is the case for Uganda as a whole as well as inadequate marketing of individual products. The responsibility for tourism destination marketing lies within the mandate of UTB, which until now has failed to engage in effective marketing up to date. In the 2013 Uganda Development Masterplan mentions: "The country faces a poor destination image (...). Uganda's tourism brand is weak, lacks a clear identity and is barely recognized outside her borders." However, as some positions have replaced, some interviewees are now relatively optimistic about UTB. As of late June, we heard about UTB's new efforts to enforce licensing upon tourism companies, which is promising as it would increase the quality offered.

Lack of competitiveness of the sector

[The Travel & Tourism Competitiveness Report 2017](#) of the World Economic Forum ranked Uganda 106th out of 136 countries included. The country underperforms on topics such as ICT Readiness (119th), Human Resources and Labour Market (115th), Health & Hygiene (130th) Air Transport Infrastructure (121st) and Ground and Port Infrastructure (117th). Uganda scores lower than countries such as Kenya (80th), Tanzania (91st) and Rwanda (97th). On a more positive note, Uganda did climb the ranks as it was 114th out of a 141 in 2015.

Lack of skills/quality human resources and few possibilities for skilling

The Ugandan tourism sector is known for its lack of qualified human resources, both for low-level jobs as well as management positions. In interviews with stakeholders, unprofessional attitudes and lack of customer care are mentioned as important issues on lower levels, whereas disloyalty, corruption and a lack of various technical skills are mentioned for the management level.

Mismatch between offer at training institutions and what is needed in the workplace

As most training institutions are too theoretical and do not fit the needs of the private sector, there are hardly any credible training institutions, both for people who are new to the sector (pre-service) as well as for upskilling current employees (in-service). Particularly the Uganda Hospitality and Tourism Training Institute (UTTHI) is unpopular among private sector players, as one of the interviewees said "For me UTTHI is not option A, nor B, nor C. In fact, for me it isn't even option Z!"

Unwillingness of many private sector players to invest in skills development

Due to the perceived lack of loyalty among Ugandan employees in the sector, many hotels, safari lodges and restaurants are unwilling to invest large amounts of money in skills development in their staff, as they believe the chance of them being offered a better deal somewhere else after they have received training is high. While it may be way too blunt as many exceptions are there, we believe this is more often the case on local-owned, cheaper places. The benefits of investing in high-quality staff is thus not always clear.

Vulnerability of staff to exploitation

Staff working in hospitality is vulnerable for exploitation, including low wages, long working hours and other poor working conditions, sexual harassment, etc. A lot of employment is informal in nature and hardly anyone has joined labour unions. There are hardly any effective labour regulations to protect them from exploitation. Many employees are not aware of their rights and may lose their jobs if they speak out against wrongdoings.

Lack of skilled personnel for management positions

Most private actors in the sector struggle to find Ugandans who have the ambitions, as well as the right attitude and skills to work in management positions. The reputation of Ugandans for those positions is bad, as they are often considered unreliable (as many prefer to be self-employed). That is why most private actors hire Kenyan, South African or Indian managers, which is a costly endeavour.

Expensive work permits for expatriate staff

At \$2,500 per year, work permits for expatriate staff form a serious investment. In addition, the first \$1,500 is non-refundable, which makes arraigning a work permit a risky endeavour. Many interviewees have mentioned the work permit policy a serious obstacle for improving the quality of their services.

Lack of career-making prospects in the sector

In the sector, American Dream-like stories are rare. As possibilities for upskilling are limited especially in terms of work-based learning, it is difficult to make a career in the sector and social mobility is limited.

Unfavourable image of tourism sector as a place to work in

For most Ugandans tourism and hospitality is not a sector they value highly. They associate working in the sector with lack of career marking possibilities, poor working conditions and low salaries. For many students, it is therefore considered a last resort. However, some experts believe this image is changing into a more positive one.

Limited availability of resources

Reading strategic plans by the Ministry of Tourism, UTB and other institutions with a mandate of developing the sector can sometimes be a bit tragic exercise: due to limited funds many of these plans will never come into practice, regardless of their ambitious nature. There are plenty of initiatives in the sector that need an investment or two, and so, the central question is which potential intervention is most effective.

Lack of adequate data, quality assurance and measurement

Because of a lack of funds at the Ministry, up-to-date and adequate data, quality assurance and measurement are lacking throughout the sector. As a result, many interventions are based on outdated data, or gut feeling.

Small percentage of visitors for leisure purposes

Of the 1,4 million visitors that are reported in 2017, only a small amount is here for leisure purposes: a mere 281,000, which is roughly 20% ([English & Ahebwa 2018](#)). Yet it is this group of visitors that is normally associated with tourism. It is also the group of visitors who spent most money in the country. In Kenya and Tanzania, leisure tourists form 75% of the total arrivals ([English & Ahebwa 2018](#)).

Lodges often provide modest benefits to the local communities

In Uganda, local communities do not necessarily benefit a lot from living near tourist lodges. Food and low-end human resources can be sources from the local communities, yet it is often difficult for these communities to live up to the needs of these lodges. Especially when it comes to enabling local communities to live up to the standards, tourist lodges often lack the capacity to do so and require the collaboration of public institutions or NGOs ([English & Ahebwa 2018](#)).

Lack of community compensation structures for human-wildlife conflicts

Although it has been in the pipeline for long, no law has been passed to ensure appropriate compensation for human-wildlife conflicts, including both wildlife destruction of crops as well as attacks to humans or livestock. As a result, local communities often perceive the vicinity of national parks a disadvantage.

Corruption in society and government institutions

On Transparency International's 2018 [Corruption Perception Index](#), Uganda ranks 149th out of 180. Rwanda (48th) Tanzania (99th) and Kenya (144th) all score better. This goes to show that corruption is perceived to be widespread throughout all levels of Ugandan society. This has severe consequences on governance, transparency and quality assurance within the sector as well as on the experience of Uganda as a tourist destination.

Practical implementations of the 20% policy

For many years, local communities have been allocated 20% of the revenues of park receipts. Yet, in order to receive those funds, the local communities need to come up with appropriate project proposals. Consequently, the budget is often partially disbursed at most. In addition, as the funds are sent to local governments, there is a risk of the money ending up in the pockets of local elites ([English & Ahebwa 2018](#)).

Road conditions on strategic stretches

Although many roads have significantly improved over the last few years, some roads toward important tourist destinations are still in bad condition. Particularly the southern access road to Bwindi NP is in bad shape and as Bwindi's gorillas are crucial to the economy, it can have large implications when tourist movements toward the park is blocked for several days because of landslides during rainy season. Also, the roads connecting Murchison Falls to Fort Portal are in bad shape, while linking two of the most important tourist destinations. Finally, the road linking Kitgum to Kidepo is important for the development of the latter as a prime tourist destination but is still lacking in quality.

Proximity of Kigali International Airport to the gorillas

As Kigali is closer to the gorillas of Bwindi NP (as well as those in Rwanda's Volcanoes NP) than the airport of Entebbe, it poses fierce competition. Some have opted for an additional international airport in Western Uganda, but according to [English & Ahebwa \(2018\)](#) it would only be beneficial for leisure tourists, who again, form only a small share of the arrivals.

Absence of proper accommodation near certain national parks

Near many national parks, particularly Kidepo NP, there is a lack of proper accommodation to live up to the rising number of tourists. Especially in the midrange sector (of \$50-100 per night, according to standards the Ministry of Tourism) there is under capacity and the value for money is considered bad.

Lack of coordination in the tourism sector

Many different (semi-)public institutions play a role in guiding the tourism sector in Uganda. These include the Ministry of Tourism, Wildlife and Antiquities, Uganda Tourism Board (UTB), Uganda Wildlife Authority (UWA), the National Forestry Authority (NFA), the Uganda Investment Authority (UIA), Ministry of Education and Sports (MOES), Ministry of Works, the Civil Aviation Authority, the Ministry of Health, the Ministry of Finance, Planning & Economic Development, the Ministry of Trade, Industry and Cooperatives, the Uganda Police Force, and the Uganda National Road Authority (UNRA). There is lack of a clear mechanism and an

effective platform for these stakeholders (and private sector representatives) to meet and coordinate their actions. This especially becomes clear at moments of crisis (such as the kidnapping of an American tourist in Queen Elizabeth N.P. early 2019).

Uganda having an LGBT-unfriendly reputation

Uganda's controversial Anti-Homosexuality Act of 2014 received a lot of attention in media worldwide. While tourists may not experience much of it, Uganda can still be considered a LGBT-unfriendly country. The act has been ruled invalid on procedural grounds. Although no data exists, Uganda's explicit disapproval of homosexuality can be expected to have led to negative effects on tourism numbers.

Lack of proper public transport

Uganda's options for public transport range from non-existent to below-par. Trains do not exist, while big long-distance busses and smaller matatus are notoriously dangerous, overcrowded and unreliable. In combination with the road conditions and congestion (particularly within Kampala and towards Jinja) make travelling by public transport an experience that will only be appreciated by the most adventurous of travellers.

Lack of electricity, phone coverage and running water near various national parks

In and near various national parks, electricity must come from generators or solar panels, pipe water is absent and phone coverage can be unreliable. As a result, covering these issues form a large expense for accommodation providers and restaurants, increasing the already high costs of doing business.

Weak online presence of the Ugandan tourism sector

The Ugandan tourism sector, including both government institutes and private companies, overall has a weak online presence - although there are exceptions of course. Most websites do not live up to the standards of what (Western) tourists expect: they do not work well, they are badly written or outdated, or they are not secure. Social media use is also sloppy in general. While having a solid online presence can for a huge boost, and while there is plenty of IT and creative talent in Uganda, the potential remains untapped in the tourism sector.

OPPORTUNITIES

Persisting overall growth of various tourism figures

Tourism is growing: worldwide, in Africa and in Uganda specifically. These growing numbers includes, among others: the overall number of visitors, employment possibilities and share of the GDP. This growth is not expected to slow down anytime soon.

Recognition of Uganda as a must-visit tourism destination in international media

Uganda's tourist potential is receiving increased international recognition. Already in 2012, Lonely Planet picked Uganda as [the best country to visit](#), and now other important media have also focused on Uganda. In 2017, CNN mentioned Kidepo NP as [the third best park](#) in Africa, while also in 2017, Rough Guides called Uganda [the fourth best place to visit](#).

Potential for both high end, mid-range and low-end tourism

With its natural beauty and potential for adventure tourists Uganda has things to offer for tourists with all types of budgets, from high end to low end, from birder to backpacker. It can be visited in groups, yet with its friendly and English-speaking population, it is attractive for independent travellers as well.

Growing contribution of the sector to GDP and employment levels

The tourism sector has a growing contribution to Uganda's GDP and more and more Ugandans are finding a job in the sector. According to the [World Travel & Tourism Council](#) the total contribution of the Tourism & Travel sector to Uganda's GDP was 7,3% in 2017, but it is expected to have risen in 2018 with 6,0%. In 2019, Uganda's tourism sector is [the 12th fastest grower](#). Uganda was Although Uganda's tourism sector may still be small (121st out of 185 in absolute size and 128th in relative size), it is growing quickly as it is 33rd in short-term and 24th in long-term growth.

Spill-over effect: other sectors start benefiting

Tourism is a sector that is tightly linked to other sectors. Tourists can boost the economy by spending money in local shops, local communities may benefit from the increased rule of law in tourist areas or by the physical infrastructure that is created to attract more tourists. As tourism flourishes in times of stability, investments in tourism tend to add to the overall stability of the country. In other words: many others may benefit from investments in the tourism sector. Yet, how this spill-over effect exactly works and how large the effect is, remains unclear as it a complex topic and no reliable data seems to exist.

Recognition of potential of MICE tourism

The MICE niche (meetings, incentives, conventions and exhibitions) is increasingly being recognized as an alternative form of tourism with its own potential. To serve this niche, there are plans to build a convention centre that can host many more visitors than the existing conference halls. At the time of writing, there is neither clear estimation of the existing size of the MICE niche nor its potential.

Domestic tourism is on a rise

With the growth of the middleclass, domestic tourism is rising. Domestic tourism cannot compete with international tourism yet and will not be able to do so in the foreseeable future. However, it does form an interesting niche market that is worth exploring, especially because it can temper shocks in the international tourism market. Moreover, domestic tourists form a large share of the clientele for cultural heritage sites.

Improved road conditions throughout the country

Over the last few years, Ugandan roads have improved significantly. Paved and well-maintained roads now link Kampala to most of the major cities and tourist destination in Uganda. Quite symbolic, it is now possible to reach Kidepo Valley NP and other parts of Karamoja within a day (although a long one).

Development initiatives undertaken by the private sector

To boost the sector, a number of development initiatives has been taken up by private sector players, both as individual companies as well as more collaborative efforts. [Gorilla Highlands](#), [Discover Karamoja](#), the Sebei Tourism Development platform and the [Mihingo Conservation Foundation](#) are only a few examples in this regard. Several other hotels and lodges (e.g. Nature Lodges, Murchison River Lodge) have developed quality internal training programs to prepare applicants, often with very little educational background or experience, for a job in the sector. Building upon these experiences, [Booking Cares](#) is now investing in [Ukarimu](#), the first open-source curriculum for hospitality training in East Africa, initiated by Mango Tree Educational Enterprises and EyeOpenerWorks.

Uganda is located near other growth markets

East Africa is going through a period of steady economic growth and regional integration is high on the agenda. Countries such as Rwanda, Kenya and Tanzania are Uganda's biggest competitor for attracting tourists, yet regional integration has its perks: it will become easier to combine trips to several of the countries.

Growing numbers of wildlife in most national parks

According to the Uganda Wildlife Authority (UWA) [most large animals are on a rise](#). Since 1999 several species of animals have more than doubled in number. These include elephants, buffalos and giraffes. The number of mountain gorillas [is also steadily rising](#).

Growth of adventure tourism

Adventure tourism is the fastest growing niche in the world, according to [a study of UNWTO and the Adventure Travel Trade Association \(ATTA\)](#). Although the report based these conclusions on numbers in Europe, North America and South America, it is safe to say that adventure tourism is rapidly growing in Africa as well. Uganda has great potential for this market, as there are possibilities for white water rafting, hiking, mountain biking and many other outdoor sports.

Potential for hiking on various mountains

With the Rwenzori mountains, Uganda possesses the world's only snowy mountain range on the equator, yet its tourist potential is not yet fully utilized. Other mountains, such as Mt. Elgon, the Virunga's and various mountains in Karamoja also have the potential to attract more visitors than they currently have.

Development of new lodges near several parks

As there is under capacity near several national parks, particularly in the mid-range market, several lodges are now being built, including lodges near Kidepo NP and Kibale Forest NP - increasing the total available number of beds significantly. However, many lodges are built in locations where the demand is not as high, which often leads to very low occupancy rates.

The reopening of Uganda Airlines

In May 2019, Uganda Airlines reopened, after having been out of operation for many years. As one of the target populations [consists of tourists](#), the reopening may form an opportunity for the tourism sector. However, this should not be overestimated as tourists won't be visiting the country just because it has its own airline. Time will tell whether Uganda Airlines actually becomes a success as [many experts are sceptical](#).

The African Union exploring possibilities for visa-free travelling

Currently, the African Union is exploring possibilities to introduce [visa-free travelling throughout the continent for all Africans](#). It has been in the pipeline for long, [but delays are common](#) and it is unsure if and when the policy will come into being. What is clear, is that for Pan African tourism it will form an opportunity.

International hotel chains move to Uganda

While big international hotel chains such as Sheraton and Marriott were already present in Uganda, [Hilton has now also announced to open up a hotel in Kampala](#), and [Latitude](#) - an international chain of boutique hotels - has just opened up a hotel in Kampala. These chains respond to a growing demand in the high-end market and could be anticipating a growing demand in this segment because of the emerging oil industry.

Potential for coffee tourism as an emerging niche market

During interviews, one of the most mentioned niche markets with a high potential in Uganda is [coffee tourism](#). Coffee tourism in the hilly parts of Western Uganda and the slopes of Mt. Elgon has been promoted by means of [a symposium in 2018](#) and is on a rise.

Eastern Loop itinerary development

As an alternative to Uganda's western tourism loop, which follows Entebbe, Lake Mburo, Lake Bunyonyi, Bwindi, Queen Elizabeth, Kibale Forest and Fort Portal, an eastern loop is emerging, which roughly follows Jinja, Sipi Falls, Kidepo, Murchison Falls. At the time of writing, this itinerary cannot compete with the western loop in terms of accommodation, food and product development. As Uganda currently relies largely on the western loop, developing the eastern loop is promising. As tourist numbers rise, there are a lot of opportunities.

Regional tourism integration

On an international level, the East African Community is working [towards the integration and development of the sector](#) in all its member states. Efforts include the introduction of the East Africa Tourist Visa (of which Uganda is currently not benefiting to the fullest, [according to some](#)).

Interest from development partners and investors to support tourism development

Whereas tourism has long been seen as the domain of the private sector and the government only, it is now increasingly been recognized as a potential economic driver by civil society and Western donors. Development organizations are more and more interested in sustainable tourism development by means of collaboration with the private sector and public institutions.

More and more foreign investors discover the Ugandan tourism sector, including private investors as well as foreign governments and donor organizations. These investors consider the sector to have a sound return on investment, financially, socially or both.

THREATS

Deforestation, habitat destruction and the effects of climate change

Deforestation, habitat destruction and climate change pose a significant threat to the precarious ecosystems of Uganda, both in and outside the protected areas. As tourism in Uganda is focused on nature, the effects of climate change, deforestation and habitat destruction on tourism will be tremendous.

Pressure related to population growth

While the population consists of 36 million at the moment, [it may reach 55 million by 2025](#) and it is [expected to reach 100 million by 2050](#). Uganda has the fourth youngest population in the world, [with a median age of only 15.9](#). At this moment, most Ugandans are small-scale farmers or rely on their food production. This poses a severe threat to the tourism sector, as the population is likely to demand a larger share of the land area for farmland, leading to less room for national parks and increasing human-wildlife conflicts and illegal encroachment.

Fierce competition of Kenya, Tanzania and Rwanda as tourist destinations

Uganda borders Kenya, Tanzania and Rwanda: countries that pose severe competition to Uganda as a tourism destination. Rather than on their tourist potential, these countries outperform Uganda particularly in their marketing strategy, product development and branding. The Ugandan tourism sector is much younger than the ones in Kenya and Tanzania, partly because of the political turmoil in the 1970s and 80s.

Proximity to failed states and conflict areas

Located next to failed states such as South Sudan and DRC, Uganda may suffer from their political instability. Although you could say that in a way Uganda has benefitted from the conflicts (for example through development aid in return for welcoming refugees), the tourism sector certainly has not. Its proximity to these countries alone may deter potential visitors from booking a trip.

External threats to safety and health

Tourism numbers are largely influenced by uncontrollable external factors such as terrorist violence and health epidemics. In tourism, the presence of such risks alone can already have dramatic effects.

On April 2, 2019 for instance, an American tourist and her driver were abducted in Queen Elizabeth National Park. She was released after a ransom has been paid. Although it has been a one-off occurrence as it is not common to abduct tourists, the negative publicity is likely to have an impact on tourism numbers in Uganda in 2019.

Also, in June 2019 the Ebola outbreak in DRC reached Uganda again. Three cases of Ebola were registered in Kasese district. Uganda has had a long time to prepare for the outbreak to reach Uganda, and [has gained experience](#) in dealing with the virus both in 2000-2001, 2007-2008 and 2012. The outbreak in DRC poses a threat to the sector, regardless of whether it will spread widely or not.

Overreliance of tourism in Uganda on proper wildlife management

At this moment, Uganda's tourism sector relies to a large extent on the presence of wildlife - mountain gorillas in particular. As mentioned before, at this moment proper wildlife management is in place. However, the precious ecosystems in the national parks can easily be affected by external factors, including bad management, climate change, poaching and introducing invasive species, population pressures and many others. It may be naïve to just assume that the key attractions of Uganda will always be there.

Poaching and animal-trafficking

Similar to most countries in Africa, poaching and animal-trafficking pose a threat to the ecosystems, national economy and the tourist sector. According to UWA, [Uganda could lose up to 10% of its GDP if it doesn't control poaching in and outside park boundaries](#), as it would have a huge effect on tourism arrivals.

The exploration of oil reserves in protected areas

In the last decade Uganda's oil reserves have been explored and exploitation is underway. However, most of these reserves are located in or nearby national parks, particularly Murchison Falls and Kabwoya Wildlife Reserve. The drilling and placing of an oil pipeline has the potential to dangerously impact the ecosystems of these parks.

The potential development of a hydro-power dam at Murchison Falls N.P.

As of June 2019, ambitions to build a hydro dam near Murchison Falls [has caused a lot of unrest](#) within the tourist sector and among environmentalists, as this will have tremendous effects on Murchison Falls National Park.

Invasive species destroying the environment

Invasive species can destroy an ecosystem, which has become strikingly visible in Lake Victoria, where the Nile perch was introduced in the 1950s. Nowadays, particularly in Queen Elizabeth National Park [invasive plant species pose a real threat to the ecosystem](#). UWA is putting a lot of effort in getting rid of these problems, but it is costly and requires a lot of efforts.

Environmental pollution and lack of environmental awareness

Pollution of the environment is a problem all over Uganda, and this hits Ugandan tourism twofold: it threatens the precarious ecosystems for which the country is famous, and it is considered a major annoyance among many tourists. Effective policies to decrease environmental pollution are also not yet in place, as for example the ban on polythene bags (known as caveras) [has been discussed for many years](#), but is still not successfully implemented.

Lack of protection of cultural heritage sites

Many of the cultural heritage sites in Uganda are managed improperly or found in an abandoned state. The Uganda Tourism Development Master Plan 2014-24 mentions: "the current law on Museums and Monuments is, therefore, weak, especially on issues of penalty for vandalizing cultural sites and monuments, preventing illicit trafficking of antiques and encroachment on land of cultural assets."

The potential merge of UWA and the Ministry of Tourism

Plans have been made to merge UWA and the Ministry of Tourism, but according to [English & Ahebwa \(2018:9\)](#) this is likely to "undermine the effectiveness and jeopardize the wildlife resources which underpin the whole sector. While there is undoubtedly duplication of some functions between UWA, UTB, UWEC and the Ministry, it would be important to conduct a study of the options for rationalization before committing to one particular solution."

Data on tourism becomes outdated quickly

As the Ugandan tourism sector has grown rapidly over the last few years and proper research is costly, data on the sector becomes outdated quickly. The risk is that recent developments get unnoticed and that new strategies and plans are based on yesterday's findings. Of course, this risk is always there, regardless of the context. Yet in Uganda, where funding possibilities are small and the bureaucracy is huge, it is an even bigger risk.

Fraudulent tour operators

Although most tour operators are organized in the Association of Ugandan Tour Operators (AUTO), not all of them are and many cannot guarantee the quality they ought to have. Even more of an issue is the rise of [fraudulent tour operators](#) who exploit and deceive tourists, the local communities or other companies. These operators harm the reputation of Uganda as a tourist destination. Luckily, UTB is currently making efforts to enforce licensing for quality assurance.

The Isimba Dam and Bujagali Hydropower Dam impacting the rafting industry

The Bujagali falls, close to where Lake Victoria enters the Nile near Jinja, have been mentioned one of the best places in the world to do white water rafting and kayaking. Until recently at least, as the installation of [the Isimba Dam](#) has affected [the white water rafting and kayaking experience](#). To the local tourism companies, it feels like a déjà vu as the launch of the Bujagali Hydropower Dam back in 2012 already had quite an impact.

Annex 4 - Full overview of suggested strategic interventions

1. Human Resources Development

Finished and existing interventions

- World Bank is investing in upgrading the hard and soft infrastructure of the Uganda Hotel and Tourism Training Institute in Jinja
- NOREC exchange program - providing exposure to Ugandan participants through and opportunity to interact with people of diverse backgrounds from all over the world
- Swiss Contact, Local Skills Development for Youth (LSDY) project in Mbale, development of needs-oriented vocational education and training in culinary skills, accounting, management and hospitality, among others
- Ukarimu, the first quality open-source curriculum for hospitality skills training in East Africa, developed by Mango Tree Educational Enterprises and EyeOpenerWorks
- The UHOA apprenticeship program, a program that offers a selected number of youths the opportunity to learn on the job with Ugandan hotels and lodges
- The Rwenzori Tourism Academy, a hospitality training program initiated by Matoke Tours, RENA Foundation and EyeOpenerWorks, in collaboration with 10 hotels and lodges in/around Fort Portal
- The Karamoja Tourism Academy, a tourism training program initiated by Kara Tunga, skilling Karimojong youth in hospitality, tour guiding, and arts & crafts production
- The Skills Development Facility implemented by Private Sector Foundation Uganda (PSFU) is a facility for support to employer-led short-term training and recognition of prior learning as well as increased access to internships for TVET students.
- The Pilot Skills Development Fund, managed by ENABEL with the support of the Belgian Government, the European Union Trust Fund and Irish Aid aims to empower public & private partners to collaborate on innovative approaches to skills development for youth, women and girls.
- The Hospitality and Tourism Sector Skill Council, supported by ENABEL consists of 14 representatives of various industry groups, and strives to steer and guide the skilling agenda in Uganda for hospitality and tourism related professions.
- The Akilah Institute is a non-profit college for women in Kigali, Rwanda, offering three-year diplomas in entrepreneurship, and hospitality management, among others. Akilah is currently exploring how they can potentially expand their program to Uganda.
- Existing training and capacity building programs of national tourism associations, including USAGA

Suggested and planned actions

- Updating and harmonization of curriculum (private sector + DIT/Ministry)
- Specific training for all various kinds of tourism professionals, e.g. tour consultants, drivers, guides, and security personnel (private sector associations, but also individual companies - Matoke Tours, Safari Sharing, etc.)
- Language training for guides

- Basic training for all stakeholders, incl. government instances on hospitality and how to treat tourists
- Promote/roll-out the Ukarimu curriculum to improve hospitality skills
- Develop quality curricula and educational tools for other courses (guides / USAGA, tour consultants, lodge managers, chefs, etc.)
- ToT for current trainers of tourism & hospitality training institutions
- Link with international centres of excellence, such as NHTV, hotel schools, etc.
- Make Uganda more accessible through hospitality by providing training to key individuals
- Update Directorate Industrial Training’s Assessment and Training Packages (Ministry)

2. Tourism Product Development

Finished and existing interventions

- Tour of Karamoja: there is an initiative by Kara Tunga that brings in bicycles to do rides around Moroto and encourage road travel across the terrain. The Tour of Karamoja is a mountain biking event that reaches far and wide in the marketing of cultural tourism.
- Cycling holiday development (Red Dirt, Ultimate Cycling, etc.)

Suggested and planned actions

- MICE development
- Coffee and tea tourism development
- Historical tourism development
- Cultural tourism development
- Sports & Leisure tourism development
- Events tourism (parties, music festivals, etc.)
- Marine tourism development
- Develop infrastructure (e.g. roads) to improve transport to national parks and touristic hotspots (UNRA, UWA)
- Promote the development of proper (mid-range) accommodation in strategic national parks and touristic hotspots
- Promote access to capital for - green - tourism related ventures, such as hotels and lodges (EU)

3. Marketing and promotion

Finished and existing interventions

- PSFU / World Bank: matching grant for marketing and promotion on national and international platforms
- TradeMark East Africa: courses in strategic plan development, online marketing, tour packaging for private sector associations (UTA, AUTO, UCOTA, etc.)
- UTB trade missions / representation at The World Travel Market (WTM), the New York Times Travel Show, and the Internationale Tourismus Börse (ITB) Berlin

Suggested and planned actions

- National brand development (UTB)
- Brand activation, incl. digital/online strategy (UTB + private sector)
- Improve regional branding and marketing capacity (UTB + regional tourism clusters)
- Strengthening corporate branding/marketing (private sector)
- Trade missions / trade show participation (private sector)
- Developing specific promotional packages for specific target groups, e.g. domestic market, youth, ‘Meetings, Incentives, Conferences, and Exhibitions (MICE), etc.
- Using special days on the calendar as days for joint action, such as World Tourism Day (Ministry?)
- Promotional/familiarization trips for tour operators

4. Tourism Management and Regulation

Finished and existing interventions

- Assessment and certification standards have been developed for hotels, this process has been coordinated by UTB. Funds for a national rollout are lacking.
- Travelife certification by Travelife Foundation, in collaboration with AUTO

Suggested and planned actions

- Development of assessment and certification standards for guides, drivers, restaurants, tour operators, travel agents, training institutes, etc. (UTB)
- Tourism data information management system (Ministry? UTB?)
- The inception of a national tourism coordination platform to convene the - at least - seven government institutions and key private sector bodies that have an interest in the sector (UTB)
- Training of inspectors and assessors (UTB)
- Roll-out/activation of certification systems (UTB and private sector)
- Legal training/workshop for tour operators, on e.g. licenses, insurances, tax, regulations, etc. (potentially linked to app safari-sharing)
- Lobby for discounts on importing tourism-related materials, such as bicycles
- Create a platform for the exchange of tourism related information
- Revive/strengthen regional tourism cluster model (UTB? Bottom-up?)
- Strengthen the organizational capacity of private sector associations

5. Natural and Cultural Heritage Conservation

Finished and existing interventions

- Bio Diversity Fund has supported the Human Wildlife Conflict Resilience project in Masindi which aimed at preserving and ensuring natural resource management. The initiative included setting up compensation schemes for damage caused by the wildlife in Western Uganda on the community’s agricultural produce.

- The USAID/ STAR program aims at helping Ugandans to reconcile the tension between natural resource conservation, environmental protection and economic development among several stakeholders in the Albertine region.
- Several initiatives related to the eradication of invasive species, human wildlife conflict and the protection and translocation of animals (UWA)

Suggested and planned actions

- Promote investment in identified investment opportunities in the national parks, such as lodging, canopy walks, ziplining, kayaking, etc. (UWA + private sector)
- Feasibility studies on identified investment opportunities in the national parks (UWA)
- Invest in tourism facilities in the park (visitor centres, fencing, roads)
- Further development of environmental conservation trainings (UWA, USAGA)
- Introduction of an environmental certificate for lodges, tour companies etc.
- Organize cultural heritage trainings and classes in school
- Awareness raising about conservational practices and tools in lodges (waste management, elimination of plastics, solar energy, etc.)
- Introduction of electric (potentially solar) powered safaris vehicles (private sector)

Annex 6 - Other donors/funders, more detailed information

1. Human Resources Development

Booking Cares - [Ukarimu, setting the standard for quality tourism and hospitality training](#)

Ukarimu, is the first open-source curriculum for hospitality training in East Africa, initiated by Mango Tree Educational Enterprises and EyeOpenerWorks, and supported by Booking Cares. Ukarimu is a collective effort created by a dedicated team of education, training and tourism professionals. The word itself is the Swahili word for “hospitality”. The curriculum aims to support programs that have an interest in preparing quality staff to enter the tourism industry.

European Union Trust Fund - [Skills Development Fund - Northern Uganda / Kiryandongo](#)

The Skills Development fund for Northern Uganda and Kiryandongo aims at enhancing livelihoods and skills relevant to the labour market for youth, women, and girls of the refugees and host communities through vocational training and entrepreneurship support in all refugee hosting district in Northern-Uganda and Kiryandongo. The fund targets 70% refugees and 30% host communities.

Basket volume: 2,600,000 € from 2016-2020

Priority sectors: Short-term relevant training in skills required by the local economy in and around the refugee settlements.

Irish Aid - [Skills Development Fund - Karamoja](#)

The fund aims at enhancing the quality of skills development to make it responsive to livelihood market needs in the Karamoja region in line with the skilling Uganda reforms. The fund aims to directly support 70% Karamojong and 30% non-Karamojong, of whom at least 80% will be youth aged 15-35 and 30% will be women and girls.

Basket volume: 1,190,000 € for 2016-2020

Priority sectors:

- Construction: roofing, electricity, painting, tiling, metal works/fabrication, carpentry, garden design
- Transport (tractor mechanics, metal welding, driving, tyre repairing, blacksmiths, and artisan fitting)
- Water (plumbing, irrigation-, solar technicians, water pump mechanics, water pump attendants)
- Energy (biogas masonry, bio gas technicians, local stove artisans)
- Agriculture (Climate-Smart Agriculture-, forest-, seed technicians, nursery bed works)
- Livestock (laboratory attendants, animal health technicians)
- Tourism (tour guides, hospitality)

the Belgian Government - [Skills Development Fund - Albertine / Rwenzori](#)

The Skills Development Fund for Albertine-Rwenzori wants at least 80% youth (including 30% women and girls) to benefit, while emphasizing the local emerging economy in the oil and gas

sector, infrastructure, construction, and sewage maintenance. The fund is implemented in the districts of Hoima, Kabarole, Kasese and Masindi.

Basket volume: 2,000,000 € for 2016-2020

Priority sectors:

- Civil Engineering (brick making and concrete practice, carpentry and joinery, masonry, plumbing, steel fixing, plastering, painting and decoration, scaffolding)
- Mechanical and electrical engineering (motor vehicle mechanics, fitting, welding, and electricity)
- Hospitality industry (tourism, accommodation, and catering)

MasterCard Foundation - [U-LEARN II](#)

The U-LEARN Project targets economically, socially and academically disadvantaged youth between the ages of 18 and 24 years from families living below or slightly above the national poverty line of \$1.90 a day. It is implemented in 14 districts in the Mwanza and Mara regions of Tanzania and 11 districts in the Central, East and Western regions of Uganda. The project focuses on three broad sectors. These are agri-business, building and construction and tourism and hospitality. These sectors are fast growing and require more locally skilled personnel to meet demand and enhance growth.

The project is guided by a unique youth and market-driven learning group model. Youth, particularly young women, are engaged in all aspects of the project, including design, implementation, and management. SwissContact acts as a market facilitator; building capacity within local institutions to deliver relevant training, business, and employment services to the youth. Through learning groups, SwissContact offers a holistic package including technical and vocational skills training, business support services, market access and linkages, social and healthy living skills training, and financial service support.

Uganda Ministry of Gender, Labour and Social Development (MoLGSD) - Apprenticeship program

Unemployment and low labour productivity are major development challenges in Uganda. Although young people attend formal education with the hope to be employed and be productive, the job market in both public and private sectors is very restricted to take up the number of graduates churned out annually.

In view of the above, the Ministry of Gender, Labour and Social Development, together with other Government Ministries, Departments and Agencies and Private Sector has designed an Apprenticeship and Graduate Volunteer Scheme. This initiative will help to bridge the skills gap among school drop-out and leavers, and also give an opportunity to young people with no prior learning to acquire skills. The initiative will fast track apprenticeship in hotels, hospitality and tourism, manufacturing, construction, agro-processing, renewable energy, oil and gas among others.

USAID - 'HIV AIDS awareness and prevention program'

Mentioned in an interview with UHOA.

World Bank - [Skills Development Facility](#)

The Skills Development Facility (SDF) is part of the \$100 million Uganda Skills Development Project (USDP), which is a Government of Uganda Project funded by the World Bank, implemented by the Private Sector Foundation Uganda. The SDF aims at promoting employer-led short-term training in order to address prevailing skills imbalances and shortages in Uganda. An important element of the initiative is to facilitate collaboration between training providers and industry to promote demand driven skills development with special attention to innovative modes of training.

The fund is implemented through a Grant Facility mechanism that is co-financed by the private sector through a matching grant contribution, and support-training activities that lead to improved productivity and competitiveness in the formal and informal sectors. The facility is a 5-year project that supports short-term employer-led training and recognition of prior learning as well as increased access to internships for Technical and Vocational Education Training (TVET) students.

World Bank- [Re-development and upgrading of the Uganda Hotel and Tourism Training Institute](#)

The World Bank has provided a loan to the Government of Uganda to upgrade UHTTI into a three-star modern and an international hotel and training institute, that will include training kitchens, training restaurants, language laboratories, hotel bedrooms and other training facilities.

2. Tourism Product Development

USAID - [STAR](#)

USAID-STAR through the US Forest Service International Program (USFS) provided technical assistance to UWA to improve trails and recreational facilities in three national parks, Mgahinga, Queen Elizabeth, and Rwenzori Mountains. USFS International Programme consultant John Near, a Protected Area Manager from the Tongass National Forest in Alaska with extensive experience in trail and facility management surveyed 48Km of trails. Trail surveys were carried out with the help of UWA guides and ranger trainees.

UNDP - [Innovation Challenge Award](#)

UNDP Uganda initiated an Innovation Challenge Call for “Scaling-up inclusive business models in support of Uganda as a preferred sustainable and inclusive tourism destination with a tourism sector that creates opportunities for all“. This Innovation Challenge Call aimed to support the scale-up of inclusive business solutions, by addressing key business level barriers through targeted funding and/or targeted technical assistance.

UNDP has supported five inclusive businesses to scale-up operations, leading to a clear positive impact on the target beneficiaries and advancement towards Uganda as a preferred sustainable and inclusive tourism destination with a tourism sector that creates opportunities for all.

European Union - Green Economy Investment Fund for SMEs

In preparation, mentioned in an interview with EU.

3. Marketing and promotion

World Bank - [Competitiveness and Enterprise Development Project](#)

The development objective of the Competitiveness and Enterprise Development Project for Uganda is to improve the competitiveness of enterprises by providing support for: (i) the implementation of business environment reforms, including land administration reform; and (ii) the development of priority productive and service sectors.

The project has several components and one of them has been tourism competitiveness development. The goal of this component is to provide support to the tourism sector through strengthening public and private sector stakeholders and their collaboration to develop a competitive tourism offering.

4. Tourism Management and Regulation

DFID, TradeMark East Africa - [Strategic plan development for tourism associations](#)

In Uganda, tourism is increasingly becoming a key source of livelihood and pride, helping to support families, local economies and build communities throughout the country. TradeMark East Africa has been very passionate about supporting this key sector.

Results achieved include:

- Implementation of the Single Tourist Visa that has seen 4447 tourists applying for the Single Tourist Visa in 2016;
- Development of 4 tourism products for marketing including: Namugongo Shrine son et lumiere; Uganda National Museum Indigenous dinner; Uganda Rwenzori Cultural Trail; and Interpretation Capacity Building for Birding.
- Development of strategic plans with relevant private sector associations.

DFID, World Bank - [Uganda Tourism Status Report](#)

The Ministry of Tourism, Wildlife and Antiquities (MTWA), in partnership with The World Bank and DFID has launched a report on the status of the Tourism Industry in Uganda. The report contained survey findings that targeted high-spending foreign tourists, especially the nature and other tourists who respond well to government policies to strengthen the tourism sector.

European Union - [Greening the Tourism Sector in Uganda](#)

The project Greening the Tourism Sector in Uganda (which is financed under Switch Africa Green phase 2) will support tens of MSMEs from Uganda's tourism accommodation sector in getting prepared to apply for the ISO14001 Environmental Management System certification and/or the Eco-Mark Africa ecolabel (or another ecolabel like Travelife). The intervention will consist (amongst others) in getting the selected MSMEs prepared, not in financing their adoption of SCP (Sustainable Consumption and Production) practises and actual applications.

The project is implemented by the Spanish organisation FUNDACION GAIKER with 2 Ugandan apex organisations as partners: UTA and UCOTA.

NOREC - [Community Based Tourism Businesses Support Programme](#)

Exchange programme between umbrella organisations for community tourism in Uganda, Kenya and Tanzania. The aim is to develop and assist community-based tourism enterprises through the work of umbrella organisations for community tourism in Uganda, Kenya and Tanzania.

UNDP - [Improving Policies and Regulations to Support Development of Markets in Tourism](#)

Tourism has become a key sector for Uganda's economic growth especially as the number of visitors to the country and their expenditure while here increases. To ensure long term benefits to the country and its economy, the Government of Uganda with support from UNDP has been working to improve the existing policies and regulations on tourism. The Improving Policies and Regulations to Support Development of Markets in Tourism project has provided support for:

- The revision of the National Tourism Policy (2003) so that it is well aligned with the National Development Plan priorities while taking into account the current national and global tourism context;
- Preparation of the National Tourism Strategy and Master Plan;
- Development of regulations that will operationalise the Tourism Act (2008). This is expected to contribute to significant improvements in the legal and policy environment in the tourism industry which will enhance the performance and growth of the tourism sector.

World Bank - Capacity building support

Mentioned in an interview with World Bank.

5. Natural and Cultural Heritage Conservation

the Chinese Embassy - [Donation of laptops to UWA](#)

Uganda Wildlife Authority on June 11, 2019 received 8 computers (4 laptops and 4 desktops) from the Chinese Embassy in Uganda to boost the organizations conservation efforts. The computers were handed over by the Deputy Ambassador of China to Uganda Mr Chen Huixin to the Minister of Tourism, Wildlife and Antiquities Prof. Ephraim Kamuntu at the Ministry Headquarters.

European Union - [Support of the Protection of Historical Buildings in Kampala, Jinja and Entebbe](#)

The purpose of the project is to document, establish an inventory, raise awareness and advocate for the protection of the many beautiful buildings located in the three targeted cities, and eventually for their restoration/rehabilitation.

For the first step of the process in documentation, two European facilitators - a freelance photographer specialized in interiors and an architect specialized in documentation and planning for conservation of heritage buildings - have animated the workshop. Trial field works have been carried out at the Bulange, the seat of the Buganda kingdom, at Mengo Primary School and at the Namirembe Cathedral.

USAID - [Uganda Tourism for Biodiversity Program](#)

In an effort to involve communities in solving human-wildlife conflict (HWC) around Murchison Falls Protected Area (MFPA), the USAID/Uganda Tourism for Biodiversity Program, implemented by African Wildlife Foundation (AWF), has invested US\$11,000 in partnership with the Uganda Wildlife Authority (UWA) to develop a Community Wildlife Scouts program, including providing equipment worth over \$2,800. The equipment, which includes garden gloves, buckets, nose-masks, vuvuzella, bells, whistles, hoes, pick axes, spades, gumboots, raincoats, torches, and water bottles, was handed over to 122 wildlife scouts, most of whom are youth, who underwent a two day training in problem animal management with an emphasis on elephants.