

Home

The Compendium of Diaspora **Investment & Business Opportunities**



Ministry of Foreign Affairs



*Empowered lives.
Resilient nations.*

Message from the Minister of Foreign Affairs



The theme for Uganda's Golden Jubilee celebration lays emphasis on socio-economic transformation of the country. Inevitably, realization of this aspiration requires a multi-pronged approach focusing not only on the key sector priorities, but also harnessing opportunities from untapped potential and resources

There is no doubt that Ugandan Diaspora will be a central part of this effort. Over the years, there has been an increasing role and importance of the Diaspora to our country's development. The Government is cognizant of this role, and is making deliberate attempts to maximize the benefits.

Starting with the establishing of the Diaspora services Division in the Ministry of Foreign Affairs, we have now come up with this Compendium of Investment and Business Opportunities. Working closely with Uganda Investment Authority, we believe that this is yet another important step towards consolidating the gains made thus far with the Diaspora resources mobilization for national development.

I invite you to take keen interest in this Compendium, which provides details on the investment and tax regime in the country, as well as potential investment and business opportunities. We are ready to provide all necessary support within our means, and look forward to continued contribution by our Diaspora to the country's development.

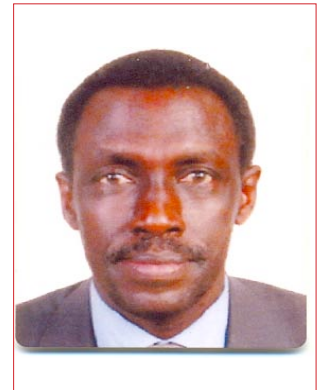
For God and my Country

Sam K. Kuteesa

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Minister of Foreign Affairs

Message from the Permanent Secretary Ministry of Foreign Affairs



The Government of the Republic of Uganda has long recognized the positive role played by Ugandans living abroad in the social and economic development of the country. It is clear that the contribution to national development by the Diaspora can only grow in the years ahead as the Government puts in place an environment that will better facilitate these efforts.

This Compendium, showcases to Ugandans living abroad a catalogue of business opportunities that exist in Uganda. The Compendium is well designed with a sectoral approach. More importantly, it provides indicative investment costs that should help guide the business decisions of our Diaspora. I therefore, commend this Compendium to our Diaspora and I have no doubt that it will provide the information that is vital to increase Diaspora investment in Uganda.

I would like to once again reiterate the commitment of the Ministry of Foreign Affairs to support our Diaspora, to lead productive and dignified lives in their host countries abroad as well as in participating in the political, social and economic development of Uganda.

I wish you the very best investment and business opportunities in Uganda.

A handwritten signature in black ink, appearing to read 'James Mugume'. The signature is written in a cursive style with some stylized flourishes.

Amb. James Mugume
PERMANENT SECRETARY /MINISTRY OF FOREIGN AFFAIRES

Message from the Country Director, UNDP-Uganda



Contribution to the national development processes is a key responsibility of all the citizens of the country. Government of Uganda in this regard has taken key steps to engage with its Diaspora with a view to enhance their contribution to the national development processes. Increasingly and in recognition of the changing global economic realities, governments have to harness all available resources from within and outside of their countries to accelerate the achievement of National Development goals and the attainment of the Millennium Development Goals.

It is within this context that the Government of Uganda instituted innovations methods and tools for incorporating the Diaspora in outlining investment opportunities within Uganda aimed at mobilizing the great untapped investment potential that the Diaspora represents. It is within this context that the Ministry of Foreign Affairs has partnered with key national institutions like the Ministry of Foreign Affairs, Uganda Investment Authority, the Bank of Uganda and UNDP to develop the necessary institutional frameworks that can support effective Diaspora investment engagement in its national development planning.

Through this engagement, a national Investment Compendium of viable opportunities has been outlined as a key document that aims to provide comprehensive information on the investment opportunities in Uganda. The Investment Compendium will ensure that Ugandans in the Diaspora are aware of the opportunities that exist in Uganda for high value investment, the process of undertaking such investment and their contribution to the attainment of the Goals of Vision 2040 of transforming the Uganda into a middle-income country in the next 15 years.

Ministry of Foreign Affairs and Bank of Uganda are also contributing to the efforts of increasing the investment potential through developing appropriate policies and the necessary financial instruments (like the Diaspora Bond) associated with the effective engagement of the Diaspora.

I commend the efforts of the Uganda Investment Authority in leading this seminal piece of work, the Bank of Uganda for the excellent technical guidance to the process and the Ministry of Foreign Affairs for their leadership.

A handwritten signature in black ink, appearing to read 'Lebogang Motlana', with a large, sweeping flourish at the end.

Lebogang Motlana
COUNTRY DIRECTOR, UNITED NATIONS DEVELOPMENT PROGRAMME, UGANDA

Foreword by the Executive Director Uganda Investment Authority



I am pleased to present this Compendium, which will provide guidance for potential Diaspora investment and also be used to promote Uganda as a preferred investment destination in Africa.

This Document has been developed to give you a definite direction and focus on a Diaspora investments attraction strategy, which promotes and facilitates latent investment and technology transfer by the Diaspora.

A brief overview of the business climate in Uganda is provided with profiles of 17 sectors and a summary of market conditions, key demand drivers, a snapshot of investment opportunities as well as over 200 business ideas. Each Chapter, in this publication attempts to give information on specific aspects of investment in Uganda and provides a starting point for prospective investment from the Diaspora.

It provides summarized information on tax regimes, incentives and regulatory aspects that have a bearing on investment inflows. It also covers some legal, administrative and compliance aspects to the larger East African Community. In addition, investment and trade procedures are being simplified. There is also harmonization to cover the greater East African regional market and other countries.

I believe that for a growing and booming economy, propelled by investment, a comprehensive guide is the core of facilitating these investment inflows successfully. Furthermore, in the past decade, there have been growing Ugandan Diaspora investments and remittances, which have generated keen investment interest at home.

I compliment Uganda Investment Authority's Investment Promotion Division, the Diaspora Desk of Ministry of Foreign Affairs and United Nations Development Program in Uganda on this valuable and timely publication, which I am sure, will prove useful to the Ugandan Diaspora and other readers.

A handwritten signature in blue ink that reads "- Sebbowa". The signature is written in a cursive, slightly stylized font.

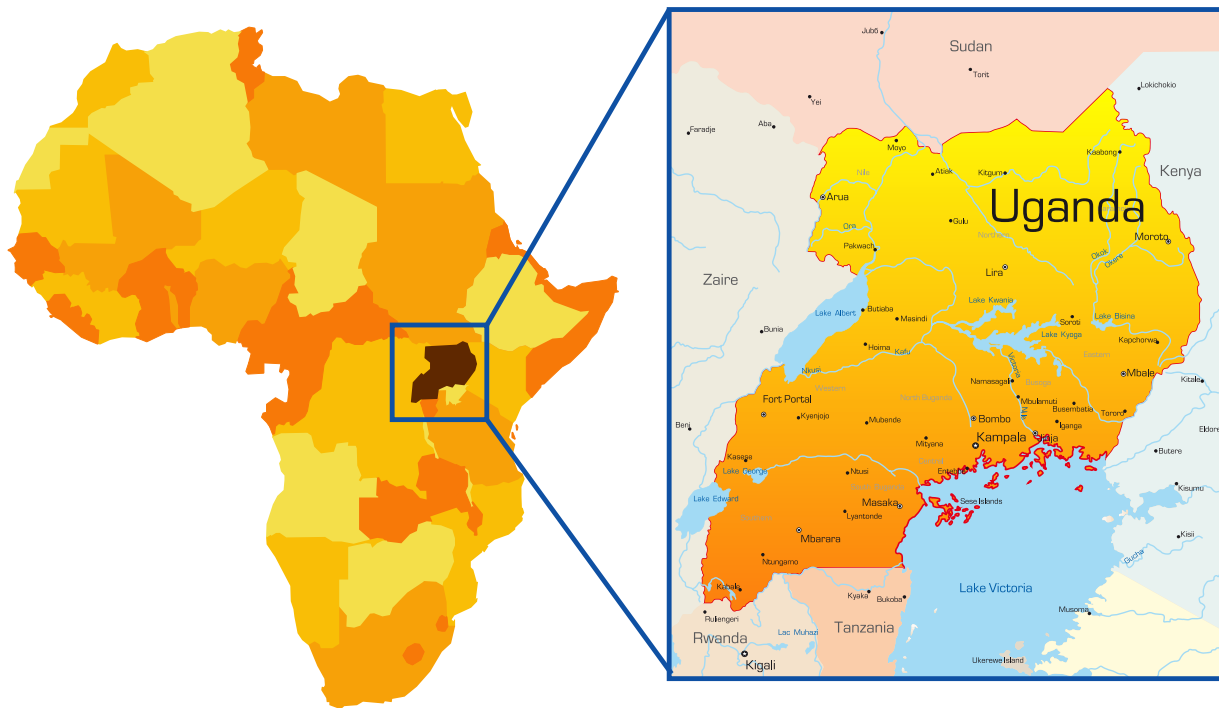
Eng. Dr Frank B. Sebbowa
Executive Director Uganda Investment Authority

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1.1 Uganda – Key Features and their Economic Implications

Map 1: Uganda’s Geographical Position



Source: Uganda Investment Authority

1.1.1 Area

Uganda is located in the Eastern part of Africa, in the centre of the Great Lakes region, providing easy access to markets in Eastern and Southern Africa. Key information about Uganda is presented in form of geographical indicators below.

Geographical Indicators

| | |
|-----------------------------|---------------------------|
| Latitude | 4°12’N & 1°29’S |
| Longitude | 29°34’E & 35°0’E |
| Altitude (minimum ASL) | 620 metres |
| (Maximum ASL) | 5,110 metres |
| Total surface area | 241,550.7 km ² |
| Area under water and swamps | 41,743 km ² |
| Temperature | 16-31°C |
| Rainfall | 700 -2000 mm/year |

1.1.2 Climate

Uganda’s climate is mainly tropical with 2 seasons of both dry and wet weather, able to sustain 2 farming seasons in a year. The northeast of Uganda is semi-arid and therefore drier. Uganda’s location astride the equator and the wonderful weather make it an all year round tourist destination.

1.1.3 Land Use

Approximately 21% of the land is under cultivation, 45% is under woodland and grassland. Approximately 13 % of the land is set aside as national parks, forests, and game reserves.

Uganda’s fertile land is suited for all year round farming of agricultural crops, which can be sold both locally and to export markets.

1.1.4. Demographics

Uganda has a population of 33.4 million (2010). It has an educated, adaptable and trainable labour force which has been growing at a rate of 2.9% per annum. The World Labour Flexibility index ranks Uganda at par with the USA - number 1, translated to mean that Uganda has the most flexible labour

market in the world. A comparative analysis of Uganda’s demographic indicators with those of Sub-Saharan Africa and low income countries is highlighted in Table 1 below.

Table 1: Comparative Analysis of Uganda’s Demographic Indicators with Sub-Saharan Africa and Low Income Countries

| | Uganda | Sub-Saharan Africa | Low-income |
|--|--------|--------------------|------------|
| Population, mid-year (millions) | 33.4 | 853 | 796 |
| GNI per capita (Atlas method, US\$) | 500 | 1,176 | 528 |
| Average annual growth, 2004-10 | | | |
| Population (%) | 3.2 | 2.5 | 2.1 |
| Labour force (%) | 2.9 | 2.8 | 2.6 |
| Urban population (% of total population) | 13 | 37 | 28 |

Source: World Bank

The official language is English. However, Swahili is the official language in the East African Community.

Credit: Photo/Newvision





Credit: Photo/Newvision

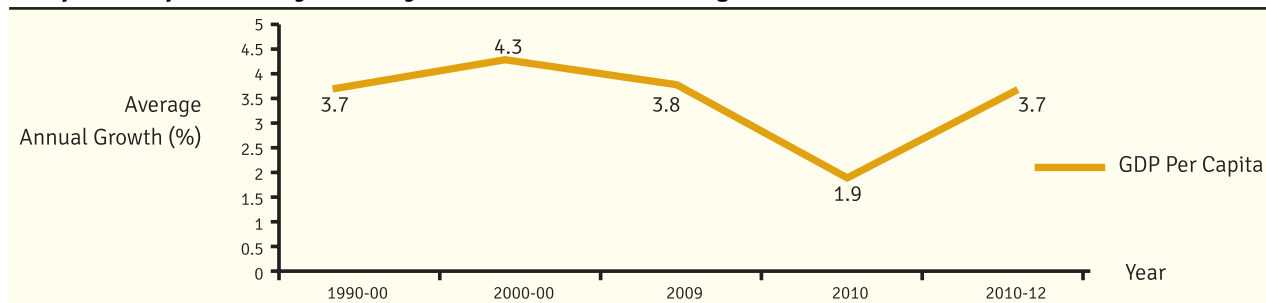
1.2 The Ugandan Economy

1.2.1 Size and Structure of the Economy

Uganda's economy is made up of the Agriculture 24.2%; Industry 25.5%; and Services 50.3% sectors. The Agricultural sector includes Fisheries, Animal Husbandry, Dairy, and Crop sub-sectors. While the Industrial sector includes Manufacturing, Construction, and Electricity Supply sub-sectors; the Services sector is made up of Wholesale and

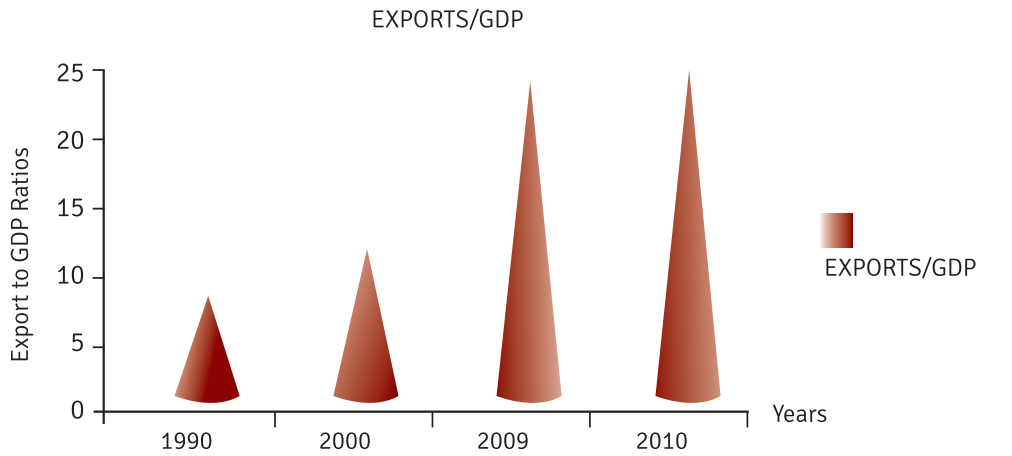
Retail trade, Telecommunications, Hotels and Restaurants, Transport and Communications and Tourism sub sectors. Uganda has sustained economic growth at an average rate of 7% per annum. The economic trends are summarized in the graphs below.

Graph 1: Graphical Analysis of Key Economic Ratios And Long-Term Trends



Source: World Bank

Graph 2: Graphical Analysis of Export Trends



Source: World Bank

Graph 3: Graphical Analysis of Gross Domestic Product Trends



Source: World Bank

1.2.2 Macro-economic Policy framework

Uganda has a good macro-economic policy framework. The key aspects of this macro-economic policy framework includes;

- (a) Foreign Exchange liberalisation
- (b) Privatisation
- (c) Public Private Partnerships

1.2.3 Medium Term Development Plan Priorities

Uganda's vision is to have "A transformed Ugandan society from a peasant to a modern and prosperous country within 30 years". This implies changing from a predominantly peasant low income to a middle income country within 30 years. It is envisaged that Uganda will graduate to the middle income segment by 2017.

2.0 REGULATORY FRAMEWORK

2.1 Business Registration

In Uganda, a business can be set up by a sole trader / individual, in partnership, private or public limited liability companies.

Registering a Company

Companies are registered at the Uganda Registration Services Bureau (URSB). To register a Company, applicants must submit a draft Memorandum and Articles of Association to URBS. Once approved, a Certificate of Incorporation will be issued.

There is no minimum capital requirement to establish a Company. Stamp Duty of 0.5% is paid on the Nominal Value of the Company's Share Capital. The overall cost of registering a company is about US\$165,000 - excluding stamp duty. It takes only 4 working days to register a company. Diaspora can make use of Uganda Investment Authority's free One Stop Shop facility to facilitate this process.

Registering your Investment in Uganda

It is mandatory for foreign investors to obtain an investment license from Uganda Investment Authority (UIA), before setting up a business here. However, it is not mandatory for Ugandans to

obtain an investment license from UIA. The license costs nothing and there are benefits as the UIA can facilitate business by using its established network of contacts.

Steps to register your investment with UIA

1. Register your company at the Uganda Registration Services Bureau to obtain a Certificate of Incorporation.
2. Apply for an investment license with UIA using Form 1; attach a Certificate of Incorporation plus a brief Business Plan. Normal processing time for an investment license is between 2-5 working days.
3. Secure secondary clearances. Certain sectors require secondary licenses e.g. for mining, petroleum, transport, banking, telecommunications. UIA will assist you to secure these licenses within reasonable time and also help you obtain suitable industrial land and work permits for your expatriate staff. Utilities like water, telephone, and electricity can easily be secured from relevant offices.

2.2 Taxation

Tax Registration

It is mandatory to register your business with Uganda Revenue Authority (URA), upon commencement of business. Unincorporated bodies and individuals are expected to file a Preliminary Enquiry Form with the nearest URA office.

For companies, the following are also required:

- Completed Internal Revenue Company application Form, IR (CO);

- Memorandum and Articles of Association;
- Names and addresses of Directors and Shareholders; and
- Copies of vending agreement (if an already established business has been purchased).

Once the above process has been completed, and upon receipt of a file number, the investor can apply for a Tax Identification Number (TIN) from URA by completing TIN application forms

Structure

The Uganda Tax System can be summarised within Six (6) major Elements.

- Individual and Corporate income tax,
- Value added tax (VAT) on goods and services,
- Import and Excise duties, and
- Stamp duty.
- Pay As You Earn (PAYE).
- Rental Tax

Taxes are collected by self-assessment and by withholding tax on payments to residents and non-residents. Penalties and interest are charged for non-compliance and late payment of taxes.

The Uganda Revenue Authority is the overall Government agency mandated to assess, collect specified tax revenue, administer and enforce laws relating to such revenue.

Corporate and Individual Income Tax

Tax rates are governed by the Income Tax Act, July 2012. The rates are subject to change on amendment of Tax legislation. All registered business organizations are under obligation to send a provisional return of income to the URA for any year of income.

Pay as You Earn (PAYE) Tax

An Employer is obliged to withhold and account for income tax on employees' remuneration and benefits (the PAYE system).

Computation of PAYE

PAYE is calculated and remitted to the URA on a monthly basis. Computation is as follows:

Table 2: The Income Tax Rates Applicable To Resident Individuals

| Monthly Chargeable Income | PAYE Monthly Tax Rates |
|---|--|
| Less or equal to 235,000 | NIL |
| Exceeding Shs. 235,000 but not exceeding Shs. 335,000 | 10% of the amount by which chargeable income exceeds Shs.235,000 per month. |
| Exceeding Shs. 335,000 but not exceeding Shs. 410,000 | Shs. 10,000 + 20% of the amount by which chargeable income exceeding Shs. 335,000 |
| More than Shs. 410,000 | (a) UShs.25,000 + 30% of the amount by which chargeable income exceeding Shs. 410,000; and (b) Where the chargeable income of an individual exceeds Ushs.10,000,000 (ten million) per month, an additional 10% charged on the amount by which chargeable income exceeds 10,000,000 per month. |

Source: URA

Table 3: The Income Tax Rates Applicable To Non-Resident Individuals

| Monthly Chargeable Income | PAYE Monthly Tax Rates |
|--|--|
| Not exceeding Ushs. 335,000 pm | 10% |
| Exceeding Shs. 335,000 but not exceeding Shs. 410,000 pm | 10% of the amount by which chargeable income exceeds Shs.235,000pm. |
| Exceeding Shs. 335,000 but not exceeding Shs. 410,000 | Shs. 33,500 + 20% of the amount by which chargeable income exceeding Shs. 335,000 |
| More than Shs. 410,000 | (c) UShs.48,500 + 30% of the amount by which chargeable income exceeding Shs. 410,000; and (d) Where the chargeable income of an individual exceeds Ushs.10,000,000 pm, an additional 10% charged on the amount by which chargeable income exceeds 10,000,000 pm. |

Source: URA

Table 4: Tax on Rental Income

| | |
|------------------------------|--|
| Individual Rental Income Tax | Rate of Tax 20%. Computed at 80% of Gross Rent after allowing a threshold of Shs 2,820,000 |
|------------------------------|--|

Source: URA

Table 5: Tax on Corporate Income

| Corporate Income Tax Structure | Rate of Tax |
|--------------------------------|-------------|
| Resident Companies | 30% |
| Non Resident Companies | 30% |
| Mining Companies | 25 – 45% |

Source: URA

Withholding Tax Structure

Withholding taxes are a form of income tax deducted at source by one entity upon making a payment to another entity. In Uganda, there are three categories of withholding tax, the most significant of which is PAYE; others are withholding tax on payments and earnings other than employment earnings as well as withholding tax on imports.

This tax is deducted by receivers of services provided by contractors together with suppliers of goods and on goods imported at CIF. It is reimbursable at the end of the financial year on the presentation of the customs receipt. A summary of withholding taxes payable appears below:

Table 6: Summary of Withholding Taxes in Uganda

| Payment | Resident (%) | Non Resident |
|----------------------------------|--------------|--------------|
| Management and Professional Fees | 6 | 15 |
| Royalties | 0 | 15 |
| Rent or use of property | 15 | 15 |
| Dividends | 15 | 15 |
| Interest | 15 | 15 |
| Imported goods | 6 | 6 |
| Domestic local works | 6 | 6 |
| Natural resources payments | 0 | 15 |
| Pension/ Annuity | 15 | 0 |

Source: URA

Table 7: Other Taxes

| Tax | Taxation Rate |
|--------------------------------|--|
| Tax on Commercial Transactions | 6% of Gross Payment |
| Tax on Professional Services | 6% of Gross Payment |
| Tax on Imports | 6% of Custom of Gross Custom Value of Goods Imported |
| Dividends/Interest | 15% of Gross Payment |
| Non Residents | 15% of Gross Payment |
| Shipping & Aircrafts | 2% of Gross Payment |

Source: URA

Capital Allowances

If you buy an asset, for example, a car, tools, machinery or other equipment for use in your business, you cannot deduct your expenditure on that asset from your trading profits. Instead, you may be able to claim a capital allowance for that expenditure.

Capital Allowances are also available for certain building-related capital expenditure. The aim is to give tax relief for deduction in value of qualifying assets that you buy and own for business use.

Table 8: Summary of Capital Deductions under the Income Tax 1997

| Type of Allowance | Rate and Conditions |
|--|---|
| Start-up Costs | 25% on Actual cost per annum for 4 years |
| Depreciation | <p>Granted on Cost base incurred.</p> <ul style="list-style-type: none"> • 40% - Class 1, Computers and Data handling equipment • 35% - Class 2, Light automobiles, construction and earth moving equipment • 30% - Class 3, Heavy automobiles including specialised trucks and machinery used in farming manufacturing and mining. • 20% - Class 4, all other depreciable assets. • 20% Farm works • 20% Horticulture • Varies over useful life – Intangible Assets with ascertainable useful life. |
| Initial Allowance granted in first year of use | 50% on cost base of plant & machinery. Industries located in prescribed areas: Kampala, Entebbe, Namanve, Jinja and Njeru. |
| Initial Allowance granted in first year of use | 75% on cost base of plant & machinery. Industries located outside prescribed areas. |
| Initial Allowance granted in first year of use of an Industrial Building | 20% on cost base of the industrial building. |
| Scientific Research | 100% on actual cost of scientific research incurred. |
| Training Expenditure | 100% on actual cost of training incurred. |
| Mineral Exploration | 100% on actual expenditure cost incurred on mineral testing and exploration. |
| Deductable annual Industrial Buildings Allowance | 5% on cost base net of initial deduction on a straight line basis. |

Source: URA

Value Added Tax (VAT)

VAT is governed by the Value Tax Act 1996. The VAT rate on goods and services is 18%. There are zero rated and exempt supplies.

Stamp Duty

Stamp Duty is an indirect tax levied on the commercial transactions listed below:

Table 9: Schedule of Stamp Duty is an in

| Transaction | Stamp Duty |
|--|---|
| Company Incorporation or increase of share capital | 0.5% of share capital |
| Transfer of stock or marketable securities | 1% of the value of stock or securities |
| Transfer of immovable property | 1% of property value |
| Lease | 1% of value of lease |
| Debenture or mortgage | 0.5% of amount of the debenture or mortgage |

Source: URA

Excise Duty and Import Duty

Excise duty and import duty are levied on different categories of products. The applicable rates of duty per product are spelt out in the Finance Bill Harmonized Tariff Code.

Tax and Regulatory Institutional Arrangements In Uganda

1. Sector Tribunal Institutional Arrangements

- Tax Tribunal, Electricity Tribunal, Insurance Tribunal

2. Sector Regulatory Authorities

- Uganda Communication Commission
- Civil Aviation Authority
- Coffee Development Authority
- Cotton Development Authority
- Electricity Regulatory Authority
- Uganda Investment Authority
- National Information Technology Authority
- Uganda Revenue Authority
- National Forestry Authority
- Retirement Benefits Authority
- National Environment Management Authority
- Dairy Development Authority.

3. The Judicial Institutional Structure for Commercial Justice – Commercial Court

Business Registration and Secondary Licensing Arrangements

It is a requirement for secondary licences to be obtained in specific sectors for example; Health, Mining, Agriculture, Fisheries, Environment and Education. These can be obtained from the sector ministries and agencies.

Tax Objections and Appeals

A taxpayer dissatisfied with a tax assessment can lodge an objection with the Commissioner of Income Tax who is required to review the assessment. If the taxpayer is not satisfied with the review, the investor can appeal to the Tax Appeals Tribunal. The Tribunal is a specialist tax tribunal that deals with disputes between the URA and taxpayers. In case one is not satisfied with the tribunal ruling, one can appeal to the High court.

Labour Regulations

Employment is governed by the Employment Act 2006. There is no minimum wage yet.

2.3 Investment Incentive Regime

The Uganda government offers a fair incentives package that provides generous capital recovery terms, especially if your project will entail significant investment in plant and machinery and you're likely to yield profits over the longer term. Information and the details can be obtained at Uganda Investment Authority.

2.3.1 Sector Specific Incentives

Sector specific incentives are available in the following sectors: Tourism, Agriculture, ICT (Business Processing Outsourcing), Renewable Energy (Solar, Wind, Geothermal and Rural electrification), Education, Health, etc. For further information please consult UIA.

A Diaspora incentives regime is being developed as part of the Diaspora Policy.

The UIA One-stop-shop

The Uganda Investment Authority One Stop Shop is a free service set up in partnership with Uganda Revenue Authority, Immigration Department, and Uganda Registration Bureau Service to facilitate investors who come via UIA with:

- Company registration
- Tax information, rights incentives and obligations, registration with Uganda Revenue Authority, clearance of machinery and equipment.
- Immigration and issue of work permits where required



Credit: Photo/Newvision

3.0 SECTOR PROFILES

3.1 Agriculture

3.1.1 Sector Size and Structure

Agriculture is a core sector of Uganda's economy. It contributed about 23% of GDP at current prices in 2011. Agricultural exports accounted for 48.5% of total exports in 2012. The sector provides the basis for growth in other sectors such as manufacturing and services.

About 60 percent of Uganda's population is engaged in agriculture, forestry and fishing. Agriculture has grown at an average rate of 2.8% per year in the last 8 years. It presents immense opportunities for growth in other sectors like manufacturing especially agro-processing.

It is for these reasons that the sector has been given priority in the national development plan.

The Agricultural sector is structured along the following lines:

i. Traditional Cash Crops:

include coffee, cotton, tea, cocoa, tobacco, sugarcane

ii. Non-traditional Cash Crops:

include; Maize, Rice, Beans, Soya Beans, palms, and Horticultural produce. The cash crops subsector accounted for 9% of agricultural value added products and grew by 16.2 % in FY2011/12.

iii. Livestock sub-sector:

The Livestock Census (UBOS 2008) indicated that the national cattle herd is estimated at 11.4 million, 12.5 million goats, 3.4 million sheep, 3.2 million

pigs and 37.4 million poultry birds. The Census also showed that livestock numbers had increased across all animal types: cattle, sheep, goats, poultry and others. But livestock production levels could only meet half of the domestic and regional demand. Growth in the sector has been achieved as a result of a favourable macroeconomic environment, policy and institutional reforms including liberalisation of the sub-sector.

iv. **Fishing**

The fishing subsector accounted for 3.1 % of GDP at current prices in the 2011/12 financial year.. 20% of Uganda's surface area is covered by water. The country has enormous potential for fresh water fisheries and aquaculture production. Uganda's fisheries resources are diverse in aquatic ecosystems and in fish species bio-diversity.

3.1.2 Players in the Sector

The agricultural sector is fragmented and dominated by small farmers most of whom combine subsistence farming with cash crop and livestock farming. Most farmers own land individually except in parts of Northern Uganda where pastoralists land is owned communally. Farming is gradually becoming mechanised although the bulk of cultivation is still done by hand or cattle driven ox ploughs.

Large / Commercial scale farming of cash crops is found in parts of the Central, South and South Western parts of Uganda. There are commercial plantations of tea, palms, rice, and sugarcane. Coffee and banana plantations tend to be small although in some parts of the South West, there are some commercial scale banana plantations that supply produce to Kampala and other urban centres.

Livestock farming is on a small scale; by small farmers too, although of recent commercial ranches are gradually beginning to increase in parts of the South West.

Commercial fishing is still rare. Small scale fish mongers catch fish from Uganda's lakes and rivers and sell it. Increasingly, fish processing plants are

being set up to process and pack frozen fish for export. There are investment opportunities involving developing commercial fishing fleets, processing plants and fish farms.

Statutory Institutions

Ministry of Agriculture, Animal Industry and Fisheries (MAAIF). There are eight semi autonomous bodies which report to the Ministry for policy guidance. These are:

- National Agricultural Research Organisation (NARO);
- National Agricultural Advisory Services (NAADS) for delivery of advisory services;
- National Animal Genetic Resource Centre and Data Bank (NAGRC&DB) for animal genetic development;
- Coordinating Office for the Control of Trypanosomiasis in Uganda (COCTU) ;
- Dairy Development Authority (DDA) for promotion of Dairy development;
- Uganda Coffee Development Authority (UCDA) for promotion of coffee development;
- Cotton Development Organisation (CDO) for promotion of cotton development;
- Plan for Modernisation of Agriculture Secretariat (PMA)

3.1.3 Demand Drivers and resource base factors

Demand drivers

Demand for agricultural produce is driven by:

- Local, Regional and Global population growth
- Urbanisation
- International demand for organic agricultural commodities
- Changing dietary needs
- Demand for bio fuels
- Rise in per capita income

- Demand for ethical products
- Food purchases by humanitarian organisations like World Food Programme
- Government policy to improve the sector.

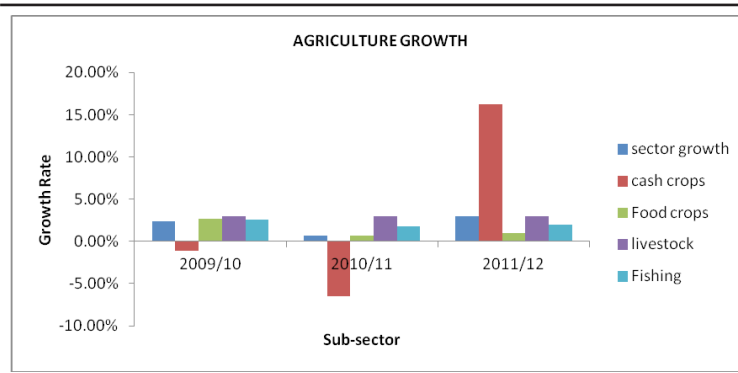
Resource Base Factors

Uganda is endowed with:

- Fertile soils
- All year round sunshine with moderate temperatures
- Sufficient rainfall
- Many lakes and rivers with sizeable stocks of aquatic life and
- Its surrounded by neighbouring countries that are not able to produce enough food to feed their populations.

3.1.4 Key Trends

Graph 4: Agriculture Growth Trends



Source: UBOS Statistical Abstract 2012

3.1.5 Investment and Business Opportunities

Investment opportunities exist in Primary production, Value addition and Services in the agriculture sector.

Primary Production

- Commercial farming opportunities exist in traditional and non-traditional cash crops targeting local, regional and international markets; apiculture development; and sericulture development
- Horticulture
- Commercial fish farming
- Poultry farming
- Animal husbandary farming
- Green house farming for seasonal commodities like vegetables fruits and flowers so they are available all year round.

Value Addition

Food Processing: Coffee roasting and grinding plants; grain processing; fish and beef canning, tomato paste, fruit juice extraction; Natural fibre processing; instant coffee processing. Butter and cheese production, yoghurt, milk curds, UHT milk; hides and skin processing; honey processing; bees wax; silk textiles; production of animal feeds, as well as fertilizers; making pasta out of maize; manufacture of cooking oil from nuts and maize; hatcheries

Services

- Storage facilities for grain, milk, coffee.
- Transport management and logistics.
- Packaging
- Setting up abattoirs in different parts of the country
- Commodity brokerage
- Agricultural Institutional financing
- Advisory services for both crops and animals
- Farm implements, inputs and machinery
- Irrigation
- Veterinary and plant medicine

3.1.6 Sector Specific Licensing Requirements

(Refer to Appendix 3)

3.1.7 Sector Specific Incentives

These are provided in manufacturing and agro-processing sub-sectors

3.1.8 Useful Addresses and Contacts

Ministry of Agriculture, Animal Industry and Fisheries,
Plot 5, Kyadondo Road.
Block A, Legacy Towers, Nakasero
P.O. Box 34518
Kampala, Uganda

Tel:256-414-4531411
Fax; 256 414 255183
General Email: ps@agriculture.go.ug
Website: <http://www.agriculture.go.ug>



Credit: Photo/Newvision

3.2 Forestry

3.2.1 Size and Structure

Forests and woodlands cover approximately 4.9 million hectares in Uganda, about 24% of the total land area. The vast majority of this is woodland (19%), while the rest is tropical moist forest (5%) and forest. In 2011, Forestry contribution to GDP was 3%. The sector offers employment in the formal and informal sectors.

The National Forestry Authority (NFA), estimates the present employment of the forest-based activities in the formal sector at approximately 100,000 man years distributed by main activities as follows (Man-years are based on 260 working days per year)

| | |
|---|--------|
| 1) Fuel wood and charcoal production | 89,150 |
| 2) Industrial Plantation establishment and management | 10,000 |
| 3) Forest industry (including harvesting) | 1,800 |
| 4) Non-wood (Rattan, beekeeping) | 200 |
| 5) Institutions | 2,200 |
| 6) Consultancy services in the Sector | 1,500 |

Source: National Forest Authority

There are 698 (1,266,000 hectares) gazetted forest reserves. In addition, 730,000 hectares are located in national parks and game reserves. The majority of the reserves are less than 1,000 hectares. Of the total gazetted forest reserves, 506 are Central Forest Reserves (CFR) and 192 Local Forest Reserves (LFR). The central forest reserves, which account for 30 per cent of the national forest cover, are managed by NFA and Uganda Wildlife Authority (UWA) while the Local forest reserves are managed by Local Governments.

Besides the publicly managed forest reserves, there is a growing number of privately owned commercial forests.

Forest Species

Uganda is endowed with various tree species that provide all the desired categories of timber. The most common are the hard wood species. Other exotic tree species are being introduced.

The total forest reserve area is estimated at 1,277,684 hectares, of which 99.6 % is under the Central Forest Reserves while 0.4% is on Local Forest Reserves. Uganda offers six (6) principal indigenous/natural forest reserves for harvesting with hard wood species such as Chlorophora excelsa, Celtis, Maesopsis eminii, Entandrophragma, Cynometra alexandrii, Lova brownii, and Newtonia buchanani.

Table 10: Principal Forest Reserves, Location and Sizes

| Reserves | Location | Area (Sq. km) |
|---------------------|---------------------|---------------|
| Budongo | Masindi | 793 |
| Bugoma | Hoima | 365 |
| Kalinzu-Maramagambo | Bushenyi/ Rukungiri | 580 |
| Kasyoha-Kitomi | Bushenyi/ Mbarara | 399 |
| Mabira | Buikwe | 306 |
| Sango Bay | Rakai | 151 |

Source: National Biomass Study Forestry Regulatory Authority

Current structure of Players in the Sector Policy, Legal and Regulatory Framework

The governing law for the sector is the National Forestry and Tree Planting Act 2003. It subdivides the sector into five different forest managers namely; National Forest Authority (NFA) to manage the Central Forest Reserves, the District Forestry Services responsible for the Local Government Forests/Local Forest Reserves, Community Forests managed by the community and Forests on private land by the private land owners. The Act also established a Forest Inspection Division (Forestry Sector Support Department) to provide supportive back-up to both the NFA and District Forest Services.

3.2.2 Demand Drivers and Resource Base Factors

Demand Drivers

- Government policy to encourage tree planting
- Population growth
- Use of firewood and charcoal
- Growing local regional and international market for forest products

Resource Base factors

- Fertile soils
- Sufficient rainfall

Biomass Energy requirements

The contribution of forestry to national energy demands is mostly expressed through woody biomass use by households and institutions for heating purposes. In addition to its contribution to ecological and energy concerns, forestry also supports forestry-related commercial products and services. These include timber products, ecotourism, arts & crafts, bee products, herbal medicine and rattan-cane. There is very little information to indicate trends in these products and services.

Projections of domestic demand for timber show a requirement of over 1million cubic meters of round wood by 2025. The market for timber products is mainly local and the export market for round wood timber is restricted in order to avoid depleting the indigenous forests. However, timber based products such as furniture can be exported.

Eco-tourism

which is based on forest biodiversity is becoming a market niche for Uganda.

General purpose timber:

The main requirement in Uganda is general purpose timber for construction and furniture making. Species like pine are very suitable for these markets and could eventually replace much of the hardwood timber.

3.2.3 Investment and Business Opportunities

Value Addition

The Sector offers numerous opportunities in areas such as:

- Timber and non timber processing
- Manufacture of high quality furniture/wood products
- Sawmilling
- Paper and printing as well as packaging.
- Saw dust for furniture
- Wood treatment

Primary production

There are also opportunities in afforestation and reafforestation especially of forest medicinal trees and craft material. Examples:

- Developing tree nurseries of pure tree seedlings and seed multiplication
- Trees for construction purposes.
- Poles for power transmission and distribution
- Eco-tourism
- Apiculture
- Herbal medicines al herbs

3.2.4 Investment trends in the sector

Investment in the sector has registered steady increase in both plantation and value addition activities.

There are several on-going forestry projects some of which include:

- New Forests Company Ltd, a sustainable modern forestry company has planted the first phase of 6,500hectares at Namasa Central Forest Reserves in Mubende District.
- Busoga Forest Company Ltd: This is engaged in commercial forest plantation in Bukaleba Forest Reserve in Mayuge District.
- Global Woods (U) Ltd: A reforestation project in Kikondwa forest Reserve in Kiboga District.

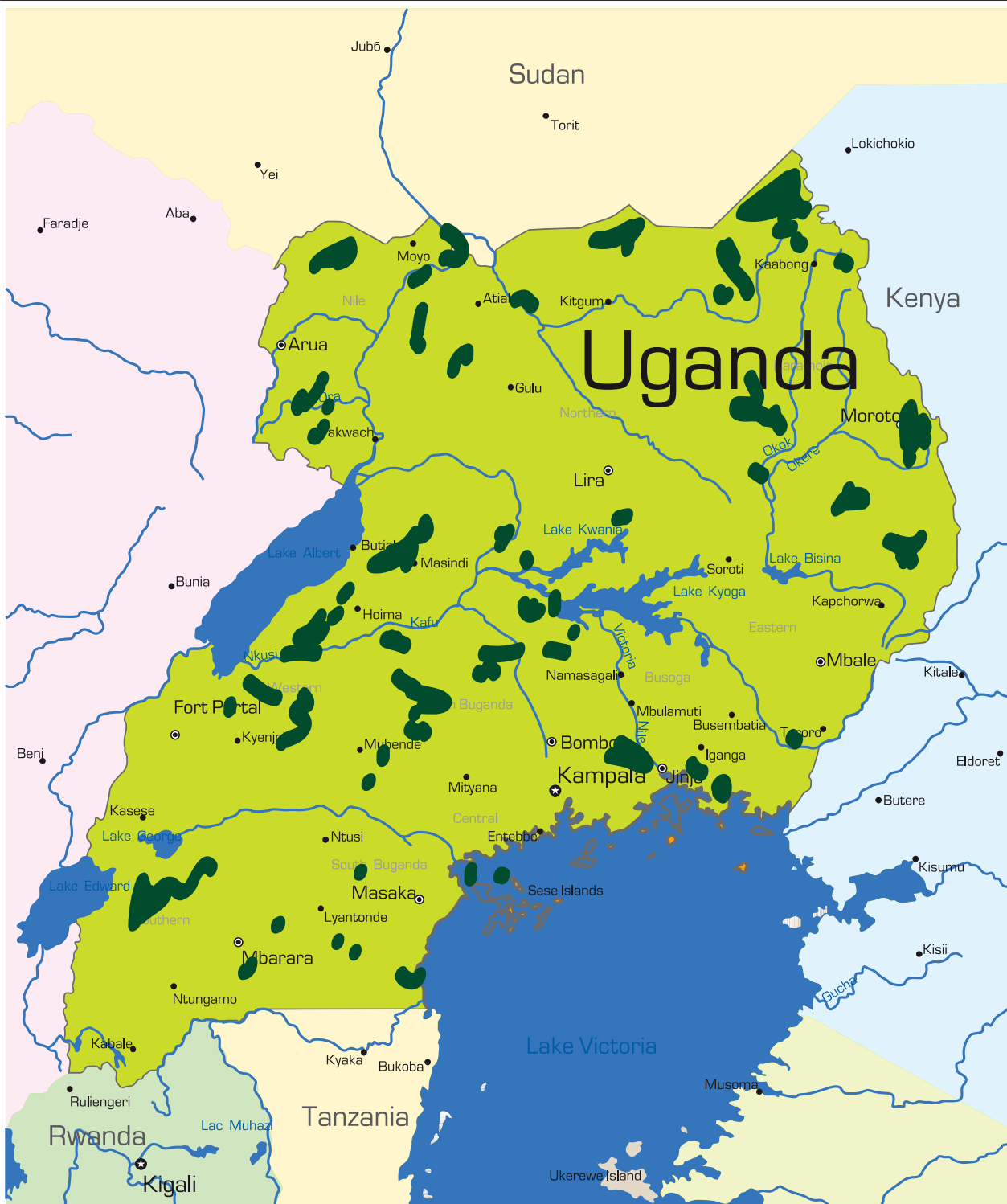
Sector Licensing Requirements

(Refer to Appendix 3)

Table 11: Useful Addresses and Contacts

| | | | |
|---|--|-----|---|
| 1 | Uganda Investment Authority P.O. Box 7418 Kampala, Uganda Tel: +256-414-301000 Fax:+256-414342903 Email: info@ugandainvest.go.ug www.ugandainvest.go.ug | 5 | Uganda Registration Services Bureau (URSB) Plot 5 George Street 4th Floor Georgian House General: +256-41-235915/233219 Fax:+256-414-250712 256-414-345727 P.O. Box 6848, Kampala Email: ursb@ursb.go.ug Website.WWW.ursb@ursb.go.ug |
| 2 | National Forestry Authority 10/20 Spring Road, Nakawa Tel: +256-312-264035/6, 414-230365/6 Fax:+256-414-230369 Email: info@nfa.org www.nfa.ug | 6 | Saw Log Grant Scheme Plot 92 Luthuli Avenue, Bugolobi Kampala Tel: +256312265332/3 Email: info@sawlog.ug Website: www.sawlog.ug |
| 3 | Uganda Manufacturers Association (UMA) Lugogo Show Grounds P.O. Box 6966 Kampala Tel: +256-414220285 Email: information@uma.co.ug Website: www.uma.co.ug | 7 | National Forestry Resources Research Institute P.O. Box 1752, Kampala Tel: 256-41-255164 Fax: 256-41-255165 Email. foridir@infocom.co.ug |
| 4 | Uganda Revenue Authority Headquarters: Nakawa Industrial Area Postal: P.O. Box 7279, Kampala Uganda General line: +256-41-334000/1-10 Email: prte@ura.go.ug Website: www.ura.go.ug | 8 | National Research Organization (NARO), Forestry Research Institute (FORI) P.O. Box 1752, Kampala Tel: +256-414-255163/255164 Fax: +256-414255165 Email: dgnaro@infocom.ug Website: www.naro.go.ug |
| 5 | National Environmental Management Authority (NEMA) NEMA HOUSE, Plot 17/19/21 Jinja Road P O Box 22255 Kampala - Uganda Tel: 256-414-251064/5/8 Email: info@nemaug.org; URL:http://www.nemaug.org | 10. | Uganda Wildlife Authority Plot 7 Kira Road, Kamwokya P.O. Box 3530, Kampala Uganda Tel: +256-41-346287, 346288, 355000 Fax: +256-41-346291 Email: uwa@uwa.or.ug Website: www.uwa.or.ug |

Map 2: Forest Reserves in Uganda



LEGEND: Forest Reserves

Source: Uganda Forestry Authority



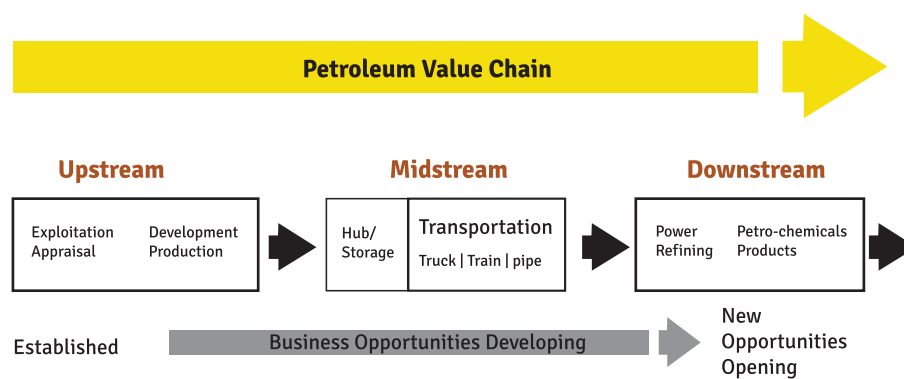
Credit: Photo/Newvision

3.3 Oil and Gas Sector

3.3.1 Size and Structure

The upstream oil potential capacity defined in terms of reserves is currently estimated at 3.5 billion Barrels of Oil as of June 2012, with most of it concentrated in the Albertine Graben. The oil reserves are likely to increase since exploration is on-going.

Illustration1: Structure



Current Structure Of Players In The Sector

Upstream:

Government

The sector is regulated by the Petroleum Production and Exploration Department under the Ministry of Energy and Mineral Development.

Exploration Companies

The major players: Tullow Uganda Operations Limited, TOTAL E&P and China National Oil Offshore Corporation (CNOOC) are partners in developing discovered reserves. The developments open gates for possible US \$10billion investments in the sector.

Midstream: (Transportation and refining)

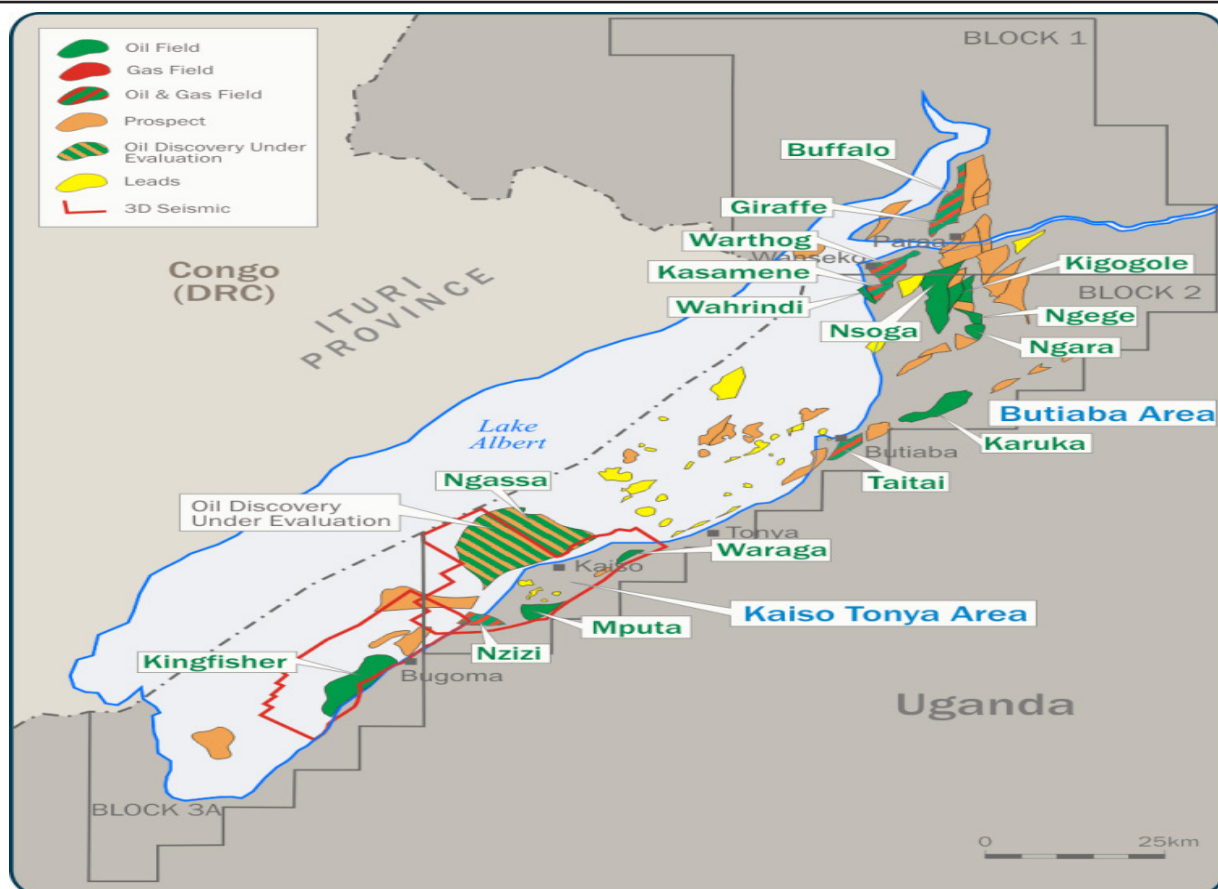
The government has plans of building a refinery in a move aimed at adding value to the crude oil, boosting employment for the locals and creating opportunities for local entrepreneurs to provide services.

Downstream: Distribution and marketing

Currently, the nation meets all its petroleum needs with imports now standing at 847,603 cubic meters, and estimated at US\$ 320 million per annum. This constitutes about 8 per cent of total national imports and represents slightly above 20 per cent of total export earnings.

Petroleum products include Premium Motor Spirit (PMS), Automotive Gas Oil (AGO), Bulk Illuminating Kerosene (BIK), Aviation Fuel, Fuel Oil (FO) and Liquefied Petroleum Gas (LPG) and other products including Lubricants and Bitumen are imported into the country. The average annual growth of petroleum consumption stands at about 5 per cent of GDP.

Map 3: Oil Discoveries In Uganda



Source: Uganda Investment Authority

3.3.2 Demand Drivers and Resource Based Factors

Demand Drivers

- Economic growth in Uganda
- Global economic growth
- Increased consumer incomes and affluence
- Purchase and use of individual and family cars
- Population growth
- Education and affluence

Resource Base Factors

- The discovery of oil paves way for the development of commercial oil production of Uganda.
- Uganda and the region import all its oil and petroleum products. Oil is a major economic driver.
- Population growth and urbanization.
- The need to supplement its own hydro-electric power.
- There is need for petroleum by-products like tar/bitumen road for construction, fertilizers for the agricultural sector, insecticides, Jet A1 for aviation and many others.
- Transport and Distribution

3.3.3 Key Trends

Projections

Table 12: Oil Production Projections

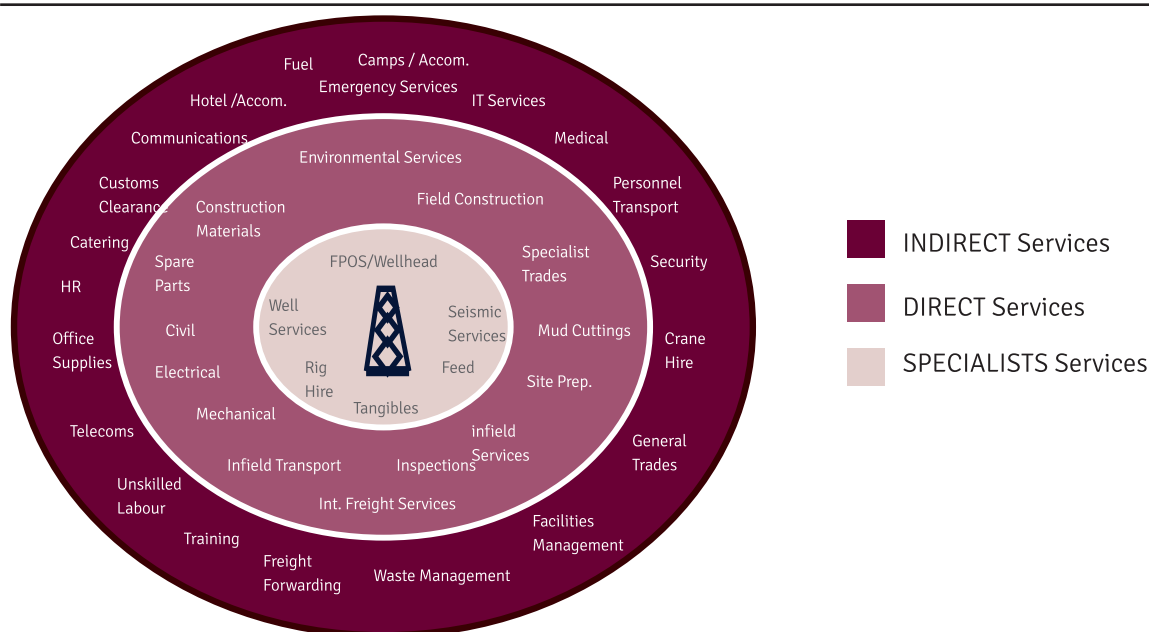
| | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
|--------------------------------------|-----------|-----------|-----------|------------|-----------|-----------|
| Barrels per day('000's) | 200 | 250 | 300 | 350 | 300 | 280 |
| Barrels per year - 365 days ('000's) | 73,000 | 91,250 | 109,500 | 127,750 | 109,500 | 102,200 |
| Oil value per day('000's) | | | | | | |
| US 80 dollars per barrel('000's) | 16,000 | 20,000 | 24,000 | 25,000 | 24,000 | 22,400 |
| US 60 dollars per barrel('000's) | 12,000 | 15,000 | 18,000 | 21,000 | 18,000 | 16,800 |
| Oil value per year ('000's) | | | | | | |
| At US 80 dollars per barrel('000's) | 5,840,000 | 7,300,000 | 8,760,000 | 10,220,000 | 8,760,000 | 8,176,000 |
| At US 60 dollars per barrel('000's) | 4,380,000 | 5,475,000 | 6,570,000 | 7,665,000 | 6,570,000 | 6,132,000 |
| Government Revenue per day | | | | | | |
| US 80 dollars per barrel ('000's) | 6,400 | 8,000 | 9,600 | 11,200 | 9,600 | 8,900 |
| US 60 dollars per barrel ('000's) | 4,800 | 6,000 | 7,200 | 8,400 | 7,200 | 6,720 |
| Government revenue per year | | | | | | |
| At US 80 dollars per barrel ('000's) | 2,336,000 | 2,920,000 | 3,504,000 | 4,088,000 | 3,504,000 | 3,270,400 |
| At US 60 dollars per barrel ('000's) | 1,752,000 | 2,190,000 | 2,628,000 | 3,066,000 | 2,628,000 | 2,175,800 |

Source: Economic Policy Research Center (EPRC)

3.3.4 Investment Opportunities

The Diagram below summarises the investment opportunities in the Oil and Gas sector.

Potential Investment/Business Opportunities In The Oil And Gas Sector



Source: Tullow Uganda

Specific Sector Licensing Requirements

The oil and Gas sector is highly regulated. Licensing requirements can be obtained from the Petroleum Exploration and Production Department. (Refer to Appendix 3)

3.3.5 Useful Addresses and Contacts

Petroleum Exploration and Production Department (PEPD),
Plot 21-29 Johnston Road,
P. O. Box 9, Entebbe.
T: +256 414 320714
F: +256 414 320437
communications@petroleum.go.ug

Ministry of Energy and Mineral Development
Plot 29/33 Kampala Road
Amber House
P.O. Box 7270 Kampala
Tel + 256 414 232987
www.energyandminerals.go.ug

Uganda Chamber of Mines & Petroleum
3rd Floor Amber House
Plot 29/33 Kampala Road
P.O. Box 71797 Kampala
info@ucmp.ug
events@ucmp.ug
www.ucmp.ug/



Credit: UNDP Photo

3.4 Energy Sector

3.4.1 Size and Structure

The total energy consumption in Uganda is estimated at over 5 million tons of oil of which 93% is derived from biomass (wood/ charcoal and agricultural residue); electricity and oil products constitute 7%. Uganda generates its own electric power from Nalubaale, Bujjagali, Kilembe, Mpanga, Nyangaki, Bugoye hydropower stations, and thermal stations.

The energy consumption pattern shows that residential related activities account for 70.3 % of total use. The rest is accounted for by commercial use (13.6 %), Industrial use (10.7%), transport use (5%) and other uses (0.4%).

Most of the energy consumed for residential activities is woody biomass energy, which cannot be used in industries in its raw form. The low level of access to electricity energy, high tariff and low generation capacity explains why the majority of Ugandans use woody biomass energy as a source of fuel.

Although, the consumption of electricity per capita is low, Uganda has an estimated hydropower potential of (over 4,500MW), biomass co-generation (1,650 MW), geothermal (450MW), peat power (800MW), high solar power and fossil fuel thermal potential as well as a high nuclear energy potential. Exploitation of these potentials will massively

reduce the deficit with time. Uganda exports some of the generated power to neighbouring Kenya, Tanzania and Rwanda. The total exports to these three countries are expected to be more than 180MW in the near future.

Energy sources available in Uganda include fuel wood, charcoal, bagasse, petroleum products and electricity (hydro and thermal).

Biomass Energy

The contribution of forestry to national energy demands is mostly expressed through woody biomass use by households and institutions for heating purposes.

Petroleum Energy

Petroleum products include Premium Motor Spirit (PMS), Automotive Gas Oil (AGO), Bulk Illuminating Kerosene (BIK), Aviation Fuel, Fuel Oil (FO) and Liquefied Petroleum Gas (LPG). All these petroleum products are imported. Petroleum is also used to generate thermal energy.

Geothermal Energy

There are a number of sites identified in western Uganda with potential for generation of geothermal

energy. These include; Katwe-Kikorongo, Burunga and Kibiro in the Albertine Graben in western Uganda. However, these are yet to be exploited.

Wind Energy

There are a number of sites in northern and north eastern as well as the central region of Uganda with potential for generation of wind energy. These include; Karamoja and Lake Victoria islands. However, these are yet to be exploited.

Solar Energy

Uganda's location astride the equator presents immense potential for generation of solar energy.

Hydro Energy

This is the major source of energy in Uganda. It is mainly used for industrial and commercial purposes.

The total installed capacity of electric power plants that feed into the national grid increased by 5.6 % from 539 Mega Watts (MW) in 2010 to 569MW in 2011 following the commissioning of the Bujagali Hydro power project in 2012, the capacity now stands at 819 MW.

3.4.2 Status of Economic Activities in the Sector

Biomass

The total nominal value for consumption of charcoal and firewood in 2009/10 was estimated to be Shs 409.1 billion. This source of energy is used in many households country-wide. This subsector is highly fragmented and dominated by small producers and families. Charcoal is made by individuals who sell it locally or to small traders who then move it on to towns and cities.

Petroleum and Its Products

Petroleum and petroleum products are used for transport. Products for transport include; Premium Motor Spirit (PMS), Automotive Gas Oil (AGO) and Aviation Fuel (Jet A1). Other products like Kerosene (BIK), gas, lubricants and bitumen are used for cooking, lighting, building and road construction. Currently, all petroleum products are imported into the country.

Electricity

The predominant sources of electricity are thermal and hydro. The total installed capacity of electric power plants that feed into the national grid increased by 5.6 % from 539 Mega Watts (MW) in 2010 to 569MW in 2011.

Table 13: Installed Capacity and Actual Generation of Power Connected to the National Grid

| Type of Power | Installed power capacity | Actual power Generation | Remarks |
|-------------------|---|----------------------------------|---|
| Hydropower | 659MW | 390-450MW | 180MW (Nalubaale HPP) 200MW (Kiira HPP) 28.84MW (Mini -HPP) Bujjagali 250MW |
| Biomass Potential | Power 26MW(17 MW) connected to the Grid | 26MW(17MW) connected to the Grid | Kakira (18MW) but to grid (12 MW), Kinyara (8MW) but to Grid 5 (MW) |
| Thermal power | 170MW | 170MW | Namanve (50MW), Kiira (50MW) & Tororo (20MW) |

Source: National Development Plan 2012

3.4.3 Demand Drivers And Resource Base Factors

Demand Drivers

- Population growth and rapid urbanization
- Industrialisation.
- Power demand in the region.
- Increased wealth in the rural communities.

Resource base factors

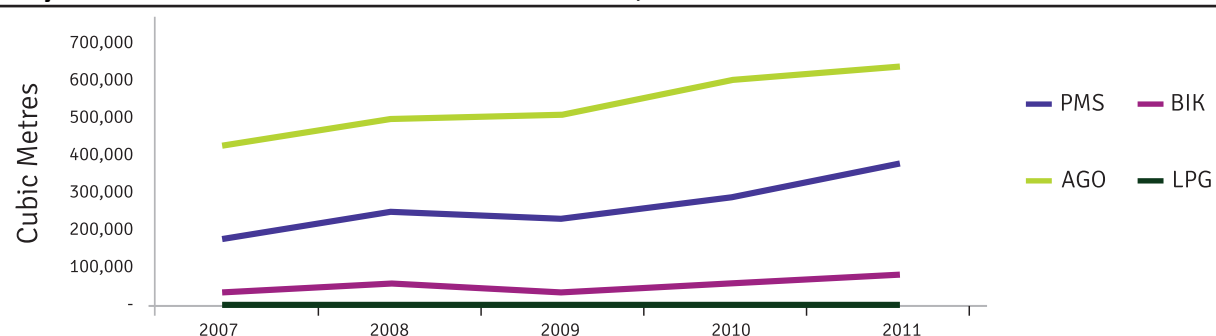
- Natural rivers and waterfalls for hydropower generation.
- All year round sunshine, which can be harvested for solar energy.
- Oil and gas deposits.
- Geothermal resources.
- Natural forests for biomass.
- Uranium deposits.

3.4.4 Key Trends

Petroleum Products

The main petroleum products volumes monitored for their contribution to the economy, are Premium Motor Spirit (PMS), Bulk Illuminating Kerosene (BIK) and Automotive Gas Oil (AGO). Graph 6, below shows that the volumes of PMS imports increased by 17 % between 2010 and 2011 while BIK imports decreased by 6%. However, AGO import volume did not show any significant change between 2010 and 2011.

Graph 6: Sales of Selected Petroleum Products, 2007- 2011

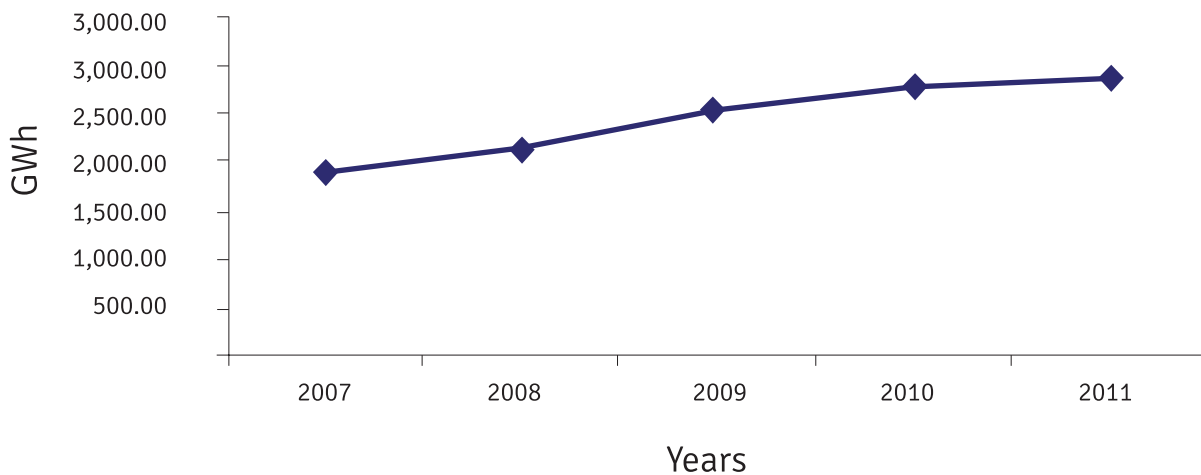


Source: UBOS Statistical Abstract 2012

Electricity

Electricity purchases by Uganda Electricity Transmission Company Limited (UETCL) from the main hydro and thermal plants that supply power to the main grid increased by 2.6 % from 2,819 GWh in 2010 to 2,891 GWh in 2011.

Graph 7: Trend of Electricity Purchases 2007 - 2011



Source: UBOS Statistical Abstract 2012

Number of live customers by tariff category, 2007 – 2011

There was a notable increase of 29.7 % in the Street lighting category in 2011 compared to previous years, that had registered persistent declines. Similarly, the number of live customers in the General Tariff category also increased by 29.6 % in 2011 compared to 2010.

(its repetition)3.4.5 Investment and Business Opportunities

Hydro

- Development of mini-hydropower stations. More than 50 mini-hydro power sites with a combined potential of 210MW have so far been identified.
- Public Private Partnerships, consulting and engineering sub contracts.
- Power transmission and distribution.

Thermal

- Development of 450 MW of electricity by tapping into geothermal resources in the rift valley.

Solar

- Assembling and marketing of solar units.
- Tapping the sun to generate solar power. Solar panels and related accessories are VAT exempt.
- Investing in local solar power grids to supply rural - urban locations as a business.

Biomass

Sugar factories use sugarcane waste (bagasse) to generate electricity. There has also been progressive adoption of utilisation of biomass for generation of energy. This has been done in form of bio-gas units for households and educational institutions. The increasing population and volume of garbage generated present opportunities for power generation.

Designing, constructing, sales and service support of biomass plants out of crop residues and livestock waste. Manufacturing and marketing of Charcoal Briquettes to replace the use of firewood and charcoal, which are hazardous to the environment in the long run.

Technologies, Equipment And Contract Services

Opportunities exist in providing supporting technologies, equipment and consultancy in the implementation of potential projects that can be developed from the various energy sources outlined above.

Sector Specific Licensing Requirements

Necessary licences can be obtained from various government ministries and agencies, some of

which include Ministry of Energy and Mineral Development, Electricity Regulatory Authority, National Forestry Authority and National Environment Management Authority. (Refer to Appendix 3)

Sector Specific Incentives for Investors

Sector specific incentives can be obtained from the Income Tax Act.

3.4.6 Useful Addresses and Contacts

Sector Ministry:
Ministry of Energy and Mineral Development.
P.O. Box 7270 Kampala, Uganda.
Tel: 256-414-234733
Email: psmemd@energy.go.ug.
Website: <http://www.energyandminerals.go.ug>

Sector Regulatory Agency:
Electricity Regulatory Authority
ERA House, Plot 15 Shimoni Road Nakasero,
P.O. Box 10332 Kampala, Uganda
Tel: 256-414-341 852/646, 256-312-200166
Email: info@era.or.ug

Rural Electrification:
Rural Electrification Agency
Plot 1 Pilkington Road
10th Floor, Worker's House
P.O Box 7317, Kampala, Uganda
Tel: 256-312-264095/264103/4/5
Fax: 256-414-346013
email: rea@rea.or.ug, Website: www.rea.or.ug

Credit: Photo/Newvision





Credit: Photo/Newvision

3.5 Transport Sector

3.5.1 Size and Structure

The Transport sector is complementary to other sectors namely; Agriculture, Forestry, Tourism, Mining, Oil and Gas, Manufacturing, Housing development and Information and Communication Technology.

The sector has two subsectors, transport infrastructure and transport services. In Uganda, the existing transport services include but are not limited to road, air, railway, and water..The transport service sub sector contributed 2.5% of GDP, equivalent to Shs1, 248 billion at current prices in 2011/12 financial year.

Air transport and support services contributed 0.7% of GDP equivalent to Shs332 billion in 2011/12 financial year.

Road Transport infrastructure:

The total national road network is estimated at 78,100 km of which 4 per cent is paved. The length of paved roads increased from 3,112 kilometres in 2010 to 3,264 kilometres in 2011. The Government of Uganda has placed high priority on development and maintenance of road infrastructure in the next 10 years.

Road Transport services:

Include Passenger Service Vehicles (PSV), which consists of buses and mini buses; privately owned cars, cargo vehicles, motorcycles (Boda Bodas) used to transport passengers; bicycles and to a limited extent donkeys. Government intends to put in place a high volume public transport system to manage traffic levels in the country.

Air Transport infrastructure:

Air transport is playing an increasing role in the promotion of tourism and in regional integration. In addition, since the country relies on the sea route to Mombasa for international trade, air transport is an alternative transport system especially in the transportation of perishable products.

In terms of infrastructure, Entebbe International Airport is currently the main functional entry and exit point into the country. There are also aerodromes (airfields) in Uganda namely: Arua, Gulu, Soroti, Pakuba, Kidepo Mbarara, Masindi, Jinja, Lira, Moroto, Kisoro and Kasese, which have been designated as exit points to handle cross border air traffic within the region. There are 60 licensed airfields but only 30 are in use.

Rail Transport infrastructure:

Currently, there are 321 km of functional rail network covering the main line from Malaba-Kampala route (251km), the Port Bell-Kampala link (9 km) and the Tororo-Mbale line (61km). The increasing export and import cargo volumes are creating a significant investment potential in railway transport.

Water Transport infrastructure:

18 per cent of Uganda's surface area consists of lakes, rivers or swamps. The principal lake and river system includes Lakes; Victoria, Kyoga, Albert and George, together with River Kagera, the River Nile.

Currently, both motorized and non motorized vessels ply the above lakes and rivers. Some water routes are served by wagon ferries while others are served by road bridge vehicle ferries. The wagon ferry routes are Port Bell - Mwanza and Port Bell-Kisumu, which also connect to the rail network. There are seven bridge vehicle ferries including three on Lake Victoria, two on Victoria Nile, one on Lake Albert and one on Albert Nile.

3.5.2 Status of Economic Activities

Uganda has enjoyed sustained economic growth over the last ten years, rising tourist numbers, growing population and new discoveries of minerals

including oil that have overstretched and put pressure on the existing transport infrastructure. This has created opportunities for investment in infrastructure maintenance and development; as well as investment in new and improved fleets of vehicles, rail wagons, aircrafts and boats.

Lake Victoria the biggest water body in the region presents connectivity among the three regional countries as one market.

National Roads

The Government of Uganda plans to improve the stock and quality of road infrastructure, which involves upgrading specific national roads from gravel to class I and II bitumen standard. The target is to:

- Upgrade national roads (from 15 per cent (3,050km) to 21 per cent (4,105km) by 2015)
- Reconstruct or rehabilitate sections of national roads
- create dual carriage roads in specific sections of national roads to improve their capacity
- Upgrade specific district roads to national roads
- To maintain national roads in good condition
- To meet these targets the Government intends to adopt a Public Private Partnership arrangement.

Railways

The government of Uganda plans to increase the volume of passenger and freight cargo conveyed on the rail network. The plan involves: rehabilitating the existing rail network and to increase the haulage capacity; reconstruction of Kampala-Kasese and Tororo-Pakwach railway lines and some sections of Malaba-Kampala railway line; construction of a standard gauge rail system connecting Kampala to Malaba with future connectivity to other parts of the country. It also plans to overhaul and revitalize the operations of the national rail system to increase haulage on the existing rail system; and to procure additional passenger and cargo locomotives.. The railway system is expected to provide cost effective transport system for both passengers and cargo.

Air Transport

Air transport is a growing mode of transport, over the period 1997 to 2007, total air passenger and cargo traffic increased by 102 per cent and 137 per cent, respectively. Increase in economic activity has created demand for additional air transport services. Passenger traffic is overwhelmingly dominated by international passengers. In 2007, international passengers accounted for 97 per cent of total passenger traffic. The percentage is even higher for international cargo traffic, which virtually accounted for all total cargo traffic in 2007. The government has planned interventions to improve air transport, some of which include:

- Upgrading Entebbe airport to class A standards.
- Completing the on-going upgrade of Arua airfield and upgrade Kasese, Soroti, Pakuba and Kidepo airfields to exit ports.
- Modernizing and expanding the meteorological services' infrastructure.
- Revising existing Public Private Partnership opportunities to allow other players on regional flight routes to and from Entebbe besides air Uganda.
- Entering into Public Private Partnerships to increase the domestic flights to various parts of the country.
- To acquire land and gazette future airfields.

Water Transport

Uganda's waterways have the potential to provide the cheapest mode of transport in comparison to road, air and rail. Government, currently, plans to increase the volume of passenger traffic and cargo freight by marine transport.

Planned interventions include:

- Conducting hydrographical surveys to map navigable routes on Lake Victoria and other lakes;
- Rehabilitating the two Ugandan wagon ferries and replace the MV Kabalega;
- Rehabilitating port infrastructure at Port Bell, Jinja and Butiaba. These activities will create investment opportunities for private investors.

3.5.3 Demand Drivers and Resource Base factors

Demand Drivers

- The increased economic activities have put pressure on existing transport infrastructure.
- Growing tourist numbers have led to an increase in demand for road, air, marine and rail transport.
- Discovery of oil and other minerals requires improved transport infrastructure to facilitate exploitation of these resources.
- Increased urbanization demands an efficient transport network.
- Increased industrialization lends to increased movement of export and import goods.
- Increased cross border trade rates call for increased demand for provision of efficient means of transport to enhance transport of people and goods.
- Regional integration.

Resource Base Factors

- Rivers and Lakes to develop waterways
- Oil refinery by product bitumen used to make roads
- Granite and other rocks used to make tarmac
- Civil Engineering Universities that churn out engineers able to build and maintain roads and other transport infrastructure

3.5.4 Key Trends

Road Transport

The road transport sector has over the years recorded tremendous growth in the number of vehicles registered.

Newly registered motor vehicles

The table below shows that, although the number of registered vehicles on roads increased between 2007 and 2008, this trend reversed in 2009 with a

1.2 % decrease in newly registered vehicles. The number of newly registered vehicles then increased slightly by 1.8 % in 2010 and further by 18.2 % in 2011 as indicated in the Table below.

Table 14: Newly Registered Motor Vehicles, 2007-2011

| Category | 2007 | 2008 | 2009 | 2010 | 2011 |
|------------------|--------|---------|---------|---------|---------|
| Newly Registered | 79,312 | 105,595 | 104,384 | 106,224 | 125,518 |
| % Change | 28.71 | 33.14 | -1.15 | 1.76 | 18.16 |

Source: URA

Air Transport

Table 13 below shows the commercial traffic at Entebbe International Airport for both International and domestic flights increased from 19200 in 2006 to 24,506 in 2011. The number of international landed passengers increased from 252,432 to 551,904 over the same period. The table below shows an annual growth rate of 5.1 % between 2010 and 2011 in passenger air transport for both domestic and International travels.

Table 15: Commercial Traffic at Entebbe International Airport, 2006 – 2011

| Mode of Traffic | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | Annual Change (%) |
|----------------------------------|---------|---------|---------|---------|---------|---------|-------------------|
| Commercial Aircraft Movement No. | 19,200 | 22,000 | 23,847 | 21,619 | 23,320 | 24,506 | 5.09 |
| Over Flight at Entebbe (No.) | 6,291 | 6,713 | 8,391 | 8,694 | 9,574 | 12,142 | 26.82 |
| Passengers International | | | | | | | |
| Landed No. | 252,432 | 396,079 | 470,397 | 468,899 | 518,791 | 551,904 | 6.38 |
| Embarked No. | 254,606 | 392,695 | 465,787 | 460,153 | 504,646 | 533,705 | 5.76 |
| Passengers Domestic | | | | | | | |
| Landed No. | 18,458 | 13,703 | 12,205 | 9,188 | 6,004 | 4,832 | -19.52 |
| Embarked No. | 17,692 | 12,196 | 10,867 | 8,721 | 5,875 | 4,676 | -20.41 |
| Freight Cargo | | | | | | | |
| Imports Tonnes | 13,236 | 22,881 | 21,298 | 19,917 | 21,344 | 20,662 | -3.20 |
| Exports Tonnes | 35,075 | 40,837 | 37,695 | 32,726 | 27,753 | 27,973 | 0.79 |

Source: Civil Aviation Authority

3.5.5 Opportunities

Infrastructure

1. Water transport infrastructure
2. Investment in water transport and entertainment vessels.
3. Investment in transport infrastructure bonds.

Services

4. Air transportation
5. Cargo transportation
6. Transport logistics and management firms.
7. Construction of road networks through Public Private Partnerships.
8. Public transport systems.
9. Road construction rehabilitation and maintenance services.
10. Training and Capacity building in road construction and maintenance; maintenance and handling of heavy trucks and equipment.
11. Investment in Road management systems.
12. Investment in local domestic air transport network and systems.

Sector Specific Licensing Requirements

Transport is licensed and regulated. Specific requirements vary by subsector with transport. These can be obtained from the Ministry of Works and Transport. (Refer to Appendix 3)

Sector Specific Incentives for Investors

Please Contact:

- Transport Licensing Board
- Uganda National Roads Authority (UNRA)
- Uganda Revenue Authority (URA)
- Civil Aviation Authority (CAA)
- Ministry of Works and Transport

3.5.6 Useful addresses and contacts

Uganda Bureau of Statistics (UBOS)
Plot 9 Colville Street
Statistics House
Tel: 256-414-706000
Email: ubos@ubos.org
Website: www.ubos.org

Uganda National Roads Authority (UNRA)
Plot 5 Lourdel Road –Nakasero
Tel: 256-312-233100/414-318000
Email: roadinfo@unra.go.ug
– <http://www.unra.go.ug>
Ministry of Work and Transport:
Plot 4/6 Airport Road Entebbe
Tel: 256-414-320101/9
mowt@works.go.ug;
<http://www.work.go.ug>



Credit: Photo/Newvision

3.6 Social Sector

3.6.1 Population

Population size and growth:

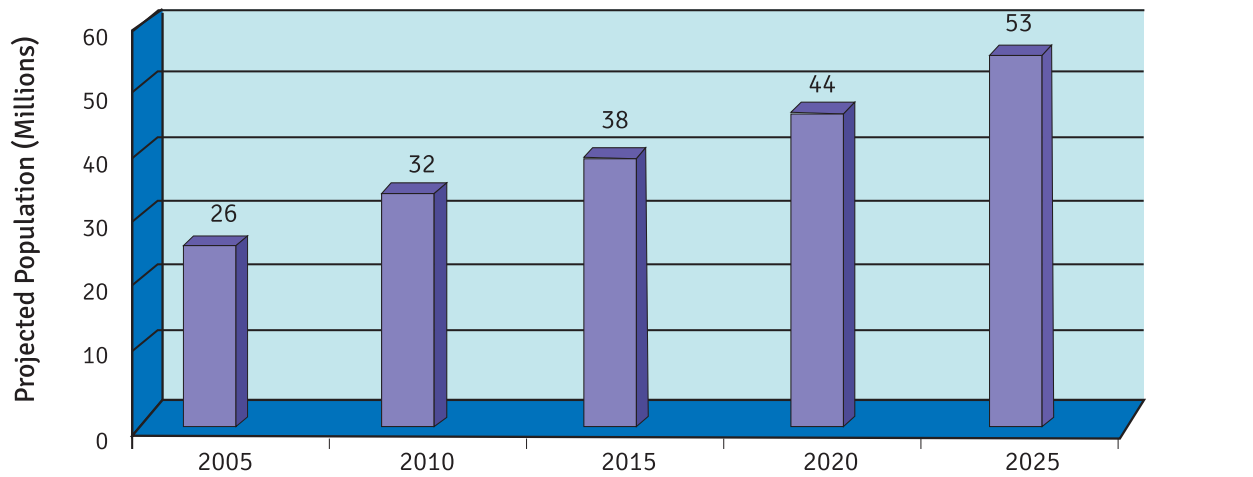
| | |
|-----------------------|---------------------------|
| Uganda's population | 34.6 million (July 2011). |
| Annual growth rate | 3.4% |
| Below 20 years of age | 70% |
| Females | 52% |
| Male | 48% |
| Urbanisation trends | 5.6% per annum |

Capacity building:

| | |
|---------------------|-------------|
| Enrolment (Primary) | 8.4 million |
| Secondary | 1.2 million |
| Tertiary | 140,000 |
| Higher institutions | 197,000 |

Source: UBOS Statistical Abstract 2012

Graph 7: Projected Population Growth 2005 -2025



Source: National Housing and Construction Company

3.6.2 Labour and Employment

Projected labour force in 2020

| | |
|--|-------------|
| The labour force participation rate with more males than females (meaning) | 82% |
| Combined unemployment and underemployment | 14 per cent |
| Average monthly income (2011) | 384,000 Ugx |
| Unemployment rate | 4.2% |

Activity status of the workforce

| | |
|-----------------|-------|
| Self employed | 76.4% |
| Paid employment | 23.6% |

Sector of Employment

| | |
|---------------------------------|-------|
| Agriculture, mining & quarrying | 66% |
| Services | 27.9% |
| Manufacturing | 6% |

Source: UBOS Statistical Abstract 2012

3.6.3 Demand Drivers

1. Enrolment in the universities producing high numbers of graduates that do not commensurate with the demand of labour supply in the market.
2. Population increase in an unemployed labour force
3. Poverty and unemployment
4. Increased number of tertiary institutions
5. Mismatch between the acquired skills and the required skills by various employers round the country.
6. High fertility rated at 5.4 which is expected to increase to 6 by 2014/2015
7. Rural urban migration
8. Positive work ethics

3.6.4 Key Trends

The Ugandan economy faces the particular challenge of needing to absorb 392,000 new entrants into the labour market each year (Ministry of Gender, Labour Social and development 2010). The latest data, released in the Uganda National Household Survey 2009/10 (UBOS 2010) indicates that the labour force growth has further accelerated to reach an annual rate of 4.7%. The employment to population ratio defined as total employment of the population aged 14-64 years as a percentage of the total population in the same age group is estimated to have increased from nearly 70% in 2005/6 to about 75% in 2009/2010 (UBOS 2010).

3.6.5 Opportunities

1. Private sector participation in investment in vocation education and training.
2. Exploitation of the financial incentives established by the Government to promote self-employment for the youth i.e. micro credit financial institutions.
3. Supply of equipment and materials to vocational education and training institutions.
4. Investment in specialized academies e.g. sports and creative art academies.
5. Exploit grants for non-formal skills development on an apprenticeship basis by Small and Medium Enterprises (SMEs)
6. Investment in entertainment centres, entertainment houses, concert halls, and in management of choirs, bands and entertainment groups.
7. Establishment of private social incubators for the purpose of development of entrepreneurial skills and business and social counselling.
8. Investment in social rehabilitation centres for alcoholics, drug addicts and sex workers.
9. Investment in Labour Market Information System (LMIS), recruitment centres and job exchange programmes.
10. Investment in social network clubs i.e. dating agencies, star call centres and blogging.
11. Homes for the elderly

Sector Specific Licensing Requirements

The Ministry of Gender, Labour and Social Development as well as Ministry of Ethics and Integrity are responsible for secondary licensing. (Refer to Appendix 3)

3.6.6 Useful Addresses and Contacts

| | |
|---|---|
| Uganda Bureau of Statistics (UBOS) Plot 9 Colville Street Statistics House Tel: 256-414-706000 Email: ubos@ubos.org Website: www.ubos.org http://www.ubos.org | Ministry of Gender, Labour and Social Development: Plot 2 Lumumba Avenue Simbamanyo House Tel: 256-414-347854/5 Email ps@mglsd.go.ug; Website http://mglsd.go.ug |
|---|---|



Credit: shutterstock

3.7 Mining Sector

3.7.1 Size and Structure

Uganda's mining sector is at an early stage of development. Uganda, currently, produces a number of minerals valued at almost Ushs.180 billion per year?. In terms of output value the most produced minerals as of end of 2010 were: Limestone, Cobalt, Wolfram, Tin, Kaolin and Pozzolana. Its contribution to GDP is small but has been steadily growing as the table below shows.

Table 16: GDP by economic activity at current prices (Shs in Billions); Shs, fiscal year

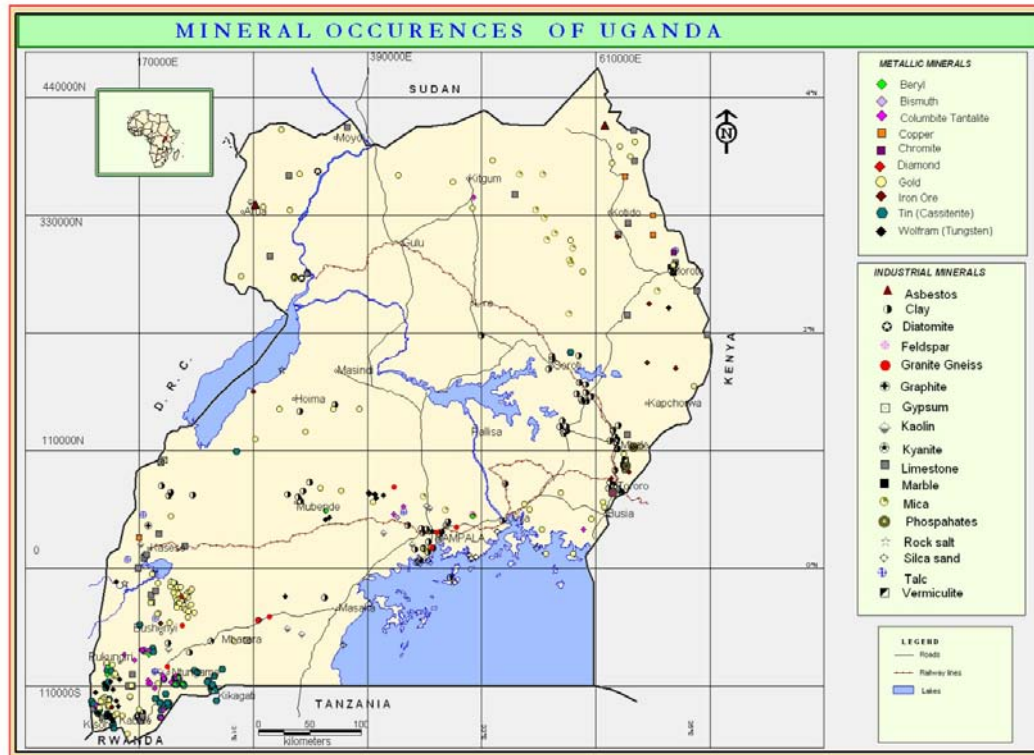
| Year | 2007/2008 | 2008/2009 | 2009/2010 | 2010/2011 | 2011/2012 |
|--------------------|-----------|-----------|-----------|-----------|-----------|
| Mining & quarrying | 73 | 81 | 106 | 134 | 180 |

Source: UBOS Statistical Abstract 2012

The airborne geophysical survey, done in estimates that there are over 27 types of minerals in significant commercial viable reserves.

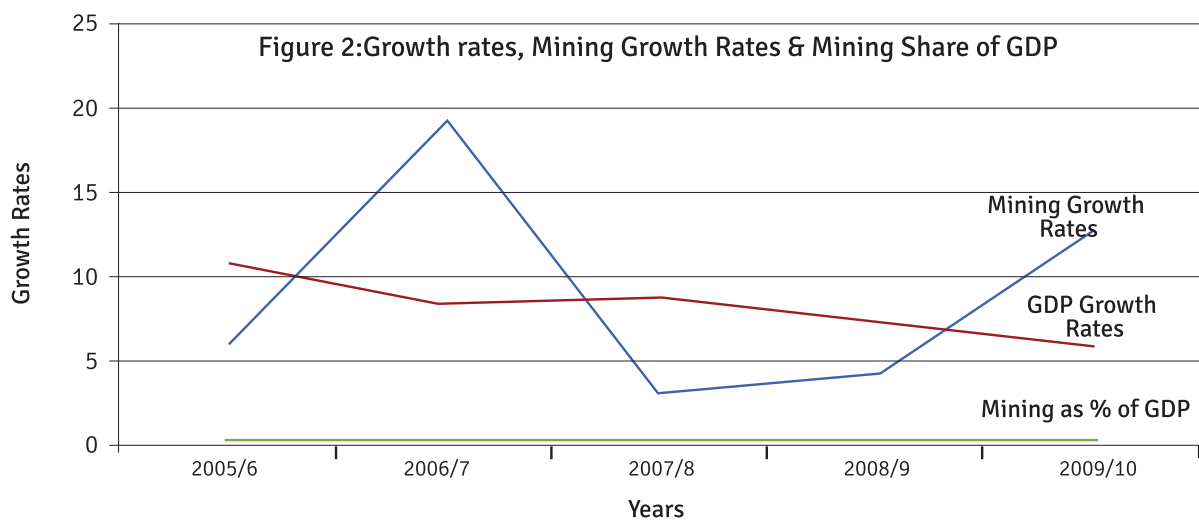
The country-wide distribution of mineral deposits is presented in the Map of Uganda below.

Map 4: Distribution Of Mineral Deposits



Source: Ministry of Energy and Mineral Development

Graph 8: Statistical Analysis of Growth of Mining Activity Vis-a-vie GDP Growth



3.7.2 Status Of Economic Activity In The Sector

There are three main categories of activities in the mining sector:

(i) Large scale, formal mining;

This is practiced by big companies like Tororo Cement Ltd, Hima Cement, Kilembe and Katwe Salt mines.. All mining activities big or small operate under leases for a specified period of time. The operations are somewhat mechanized, but also rely highly on local, manual labour.

Although companies holding mining leases may be considered “large scale” in Uganda (both in terms of the legal framework and relative scale of activities), internationally these activities are considered to be comparatively small operations. As a simple comparison of “scale”, large scale mines around the World are increasingly processing ore at rates of up to 100,000 tonnes per day, while the extraction rate on some Uganda mining leases is on the order of 1,200 tonnes per day

(ii) Exploration;

Most active exploration in Uganda involves smaller Ugandan and/or foreign venture capital funded companies that are working at a much smaller scale. Although an exploration license provides neither the right to buy or mine minerals, a number of these companies are reportedly buying from artisanal miners.

Many other companies seem to be speculators, holding exploration licenses with the intent of selling them to larger exploration investors. In addition to these companies, in Uganda (as in most countries), companies holding licenses to mine are also exploring with the intent of extending their mine life (by proving more reserves) or identifying new resources for development.

(iii) Artisanal and small scale mining (ASM);

Across Uganda, almost 200,000 Ugandan women and men use basic tools (like pick axes, hammers, shovels etc) to extract a wide range of minerals. These activities are predominantly informally organized, un-mechanized and often characterized by hazardous working conditions, lack of planning and issues related to child labour, poor health conditions and gender inequalities.

Since artisanal and small scale mining is largely informal and unlicensed (and in many cases undertaken seasonally to supplement agricultural livelihoods), contributions to mineral production and local economies are rarely captured by official statistics and men and women miners are often invisible to the mainstream or, in some cases, regarded as criminals.

Consequently, they rarely receive adequate, if any, support to formalize and improve their activities in order to realize full development potential. In most countries where ASM is taking place, miners face major challenges in formalizing and licensing their activities, largely due to challenges related to bureaucracy, cost, and literacy, among others. Exploration companies often use the presence of artisanal miners as an indication of mineral potential and, therefore, availability of “free” areas for licensing poses an additional challenge.

Each of the above groups is subject to different licensing provisions under the mining legislation.

Table 17: Mineral Type Production Volume In Tonnes

| | 2004 | 2005 | 2006 | 2007 |
|---------------------|-------------|-------------|-------------|-------------|
| Limestone | 4,28,775.90 | 5,40,755.60 | 4,25,610.70 | 4,47,462.80 |
| Pozzolan Materials | 1,34,643.97 | 1,38,932.70 | 2,13,639.90 | 2,80,522.30 |
| Vermiculite | 2,688.00 | 2,574.00 | 3,512.00 | 3,269.00 |
| Colombite/Tantalite | 0.38 | 0.3 | 0.1 | 0.1 |
| Cobalt | 459 | 637.8 | 689.2 | 636.3 |
| Gold | 1.5 | 0.05 | 0.02 | 0.03 |
| Gypsum | 181.2 | 285.3 | 121.2 | 168.2 |
| Lead (Galena) | - | - | 46 | 38 |
| Wolfram | 79.9 | 45.1 | 94.8 | 107.9 |
| Kaolin | 537 | 55 | - | 8,152.20 |
| Iron ore | - | 208.5 | - | 366 |
| Syenitic aggregates | - | 4,519.00 | 6,080.00 | 8,994.20 |
| Total | 5,67,366.85 | 6,88,013.35 | 6,49,793.92 | 7,49,717.03 |

Source: Ministry Of Energy And Mineral Development Annual Report 2008

Table 18: Mineral Exports, 2004-2007

| Mineral Type | Value UGX Millions | | | |
|---------------------|--------------------|--------|-----------|------------|
| | 2004 | 2005 | 2006 | 2007 |
| Limestone | 2.03 | 0.8 | 1,451.84 | 309.67 |
| Columbite/Tantalite | 0 | 0.75 | 0 | 62.85 |
| Cobalt | 2.7 | 11.04 | 9,183.63 | 21,196.94 |
| Gold | 151.88 | 164.14 | 219.34 | 131,566.99 |
| Lead (Galena) | 0 | 0 | 76.46 | 6.06 |
| Wolfram | 0.04 | 5.6 | 88.3 | 63.15 |
| Diamond | 0 | 56.94 | 71.243 | 43.5 |
| Tourmaline | 0 | 0 | 3.7 | 45.02 |
| Tin | 0.01 | 0 | 8.63 | 0 |
| Sapphire | 0 | 0 | 0.87 | 0 |
| Rubbies | 0 | 0 | 1.74 | 0 |
| Copper | 0.12 | 0 | 0 | 52.95 |
| Total | 156.78 | 239.27 | 11,105.75 | 153,347.15 |

Source: Ministry of energy and mineral development Annual report 2008

Current Structure of players in the sector

At the beginning of 2010, a total of 611 mineral prospecting and exploration licenses were issued. Of these, 99 were Prospecting Licenses (PL), 66 Exploration Licenses (EL), 32 Location Licenses (LL), 33 Mineral Dealers Licenses (MDL), 2 Blasters Certificates (BL) and 2 Goldsmith's Licenses (GL), while 15 Exploration (ELs), and 5 Location Licenses (LLs) were renewed.

Prospecting is performed under licence by individuals, companies and sometimes government to discover minerals.

- Exploration is performed under licence to establish availability of viable quantities of minerals. This stage involves more capital to perform detailed geological surveys including diamond drilling to ascertain mineral concentration and volumes.
- Commercial mining is performed under a mining lease. At present limestone is mined on a commercial / large scale and used to make cement. The main players are Lafarge, locally known as Hima Cement and Tororo Cement Ltd. Hima Cement mines limestone mainly from Kasese and Kamwenge. Tororo Cement Ltd mines limestone from Karamoja.
- Mining leases for phosphates, gold and Iron Ore have been issued for mines at Tororo, Tira, in Busia District, Kisita in Mubende district and Ntungamo.
- Location licences are issued to mainly individuals and communities operating at a very small un mechanised scale.
- There many unlicensed individuals mining gold as artisan miners spread across several parts of the country in Karamoja, Bude – Kitodha in Namayingo, and Buhweju.

3.7.3 Demand Drivers and Resource Base Factors

Demand Drivers

- Demand for industrial minerals such as copper and Iron Ore is driven by global economic growth. Sustained growth in China and India is the main cause of increased demand for industrial minerals. Coltan, a mineral found in several locations across Uganda is used in making mobile phones and electronic devices. Demand for Coltan is fuelled by the demand for mobile phones.
- Gold is held in reserve by governments. The global economic crisis has led to an increase in demand for Gold as governments stockpile it to boost their reserves instead of holding currencies like the US \$ and Euro.
- High demand for precious stones, rare minerals including Gold and Diamonds is driven by increase in the personal wealth of individuals who use the gems as jewels.
- Cultures in some parts of the world require gifts in form of precious stones like diamonds or gold jewellery
- Uganda's conducive investment climate in terms of human resources, friendly tax regimes, physical resources like land and financial resources among others.
- Favourable export markets within and outside the East African countries.

Resource Base Factors

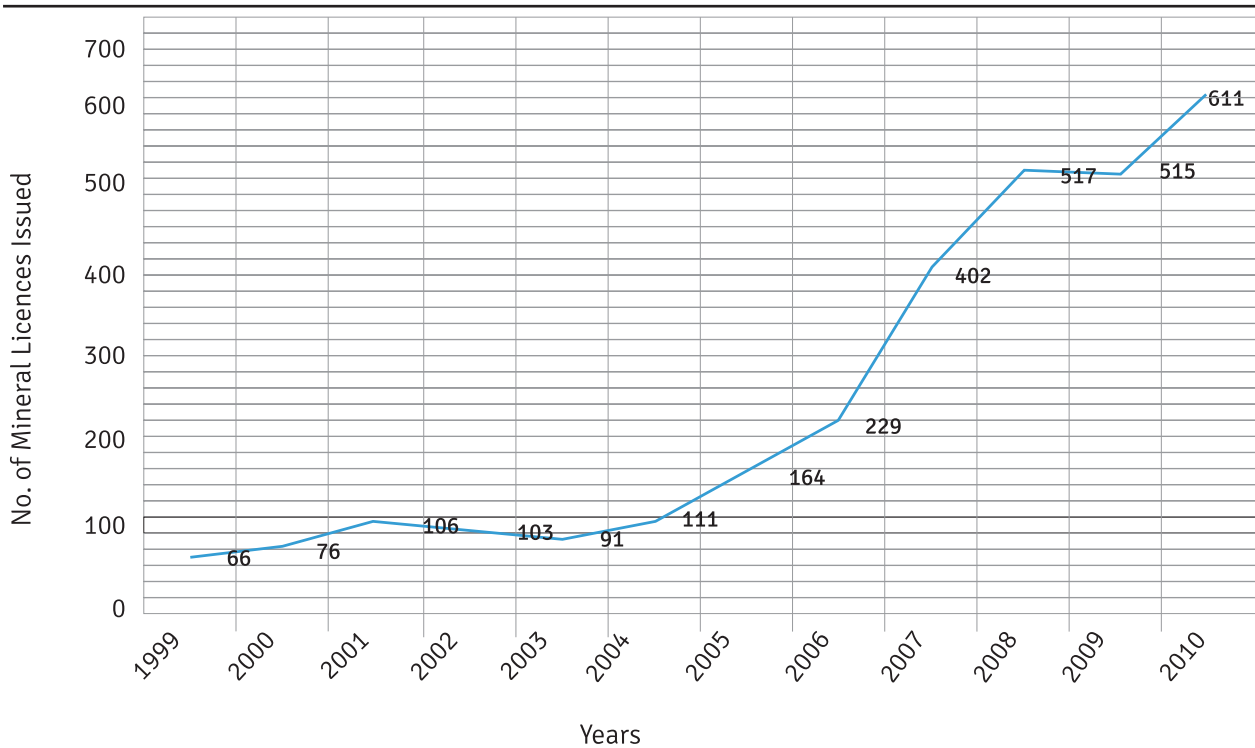
- Uganda has an abundant mineral resources base that has not yet been fully commercially exploited.

3.7.4 Key Trends

The Government of Uganda has identified the development of the country’s mineral resources as a major economic priority and has put in place an extensive plan to bring this to fruition. Investment in mineral exploration is projected to increase from the current US\$3 million to over US\$50 million annually over the next five years. It is projected that the industry will be the major driver in employment creation and GDP growth over time. In addition, the lifeline industries will spur growth in the manufacturing, infrastructure development, agriculture and ICT industries.

Figure 1, below shows the trend of licenses issued between 1999 and 2010 where the numbers grew from 66 licenses in 1999 to 611 in 2010. an impressive growth.

Figure 1: Distribution Of Mineral Deposits



Source: Ministry of Energy and Mineral Development

3.7.5 Investment and Business Opportunities

Prospecting

- Mineral prospecting

Exploration

- Mineral exploration

Value Addition

- Production of gold, copper, Iron & steel, and fertilizers
- Production of columbium and tantalum for export
- Cement manufacturing for local consumption and export
- Mining and use of Uranium for electricity generation
- Cutting and polishing stone (like granite, marble and quartzite)
- Making ventilation bricks, tiles, charcoal stoves and other ceramics
- Carving stone (like marble) into candle holders, sculptures, ashtrays and other products.
- Jewellery production

Mine Development & exploitation

- Mechanized mining
- Establishment of mineral processing plants
- Mining of Coltan for export
- Quarry development
- Revival and operation of Kilembe Copper Mines and processing plants under Public Private Partnership

Sector Specific Licensing Requirements

These are available from the Department of Geological Surveys and Mining of the Ministry of Energy and Mineral Development. (Refer to Appendix 3)

Sector Specific Incentives for Investors

- A minimum of 25% and a maximum of 45% VRIT depending on the level of profitability.
- Duty free importation of mining plant and equipment with Value Added Tax (VAT) deferment facilities.
- Investment protection under the Multilateral Investment Guarantee Agency (MIGA)
- Mineral exploration expenditures are expensed 100%
- Import taxes such as customs duty for all mining equipment is zero-rate
- There is externalisation of dividends and profits
- Generous depreciation allowance at 30% for all depreciable mining assets

3.7.6 Useful Addresses and Contacts

Ministry of Energy & Mineral Development, Amber House
P. O. Box 7270, Kampala - UGANDA
Tel: +256 41 4234733
Fax: +256 41 4234732
E-mail: psmemd@energy.go.ug
Website: www.energyandminerals.go.ug
(Policy and Legislation oversight)

Head Department of Geology Makerere University
P.O. Box 7062, Kampala
Tel.+256-414-541258
Fax. +256-414-541258/531061
Email: geology@sci.mak.ac.ug
Licensing and granting of mineral rights

Head Department of Geology Makerere University
P.O. Box 7062, Kampala
Tel.+256-414-541258
Email: geology@sci.mak.ac.ug

Department of Geological Survey and Mines of Uganda
Plot 21-29, Johnstone Road
P.O. Box 9, Entebbe / Uganda
Tel +256 414 320656/312 262902
Email: minerals@infocom.co.ug
Email : dgsm@minerals.go.ug
www.uganda-mining.go.ug

Uganda Metal Industries Association (UMIDA)
P.O. Box 8752, Kampala
Tel. +256-752-694567
Fax:+256-414-530277
(Licensing and granting of mineral rights)



Credit: shutterstock

3.8 Water and Sanitation

3.8.1 Size and structure

The water and sanitation sector has been under serious consideration since 2000. The Current investment plan is expected to cover the period 2000-2015. Between 2009/10 and 2010/11, the water produced by National Water and Sewerage Corporation (NWSC) increased from 70.5 to 77.7 million cubic meters.

Metered water

NWSC is the main provider of metered water in Uganda with the total capacity of 318, 842 m³ per day. It operates in 23 towns, 19 of which have water treatment works. The share of households with access to improved water sources has improved significantly over recent years, from 62.2% in 2002/3 to 73.8% in 2010/11. In order to ensure continued increases in access to quality water and

sanitation, government is making more capital investment in a range of water schemes. However, half of the districts are still below the national average of 63% access. Water coverage in 130 sub-counties out of 1,024 is below 39%.

Unmetered Water

The Directorate of Water Development (DWD) also supplies water especially in the rural areas and small towns through the provision of boreholes. Over the years, there has been a general increase in the amount of water supplied by DWD. In 2009/10, DWD supplied about 3.6 million cubic metres and in 2010/11, it supplied 3.9 million cubic metres registering an increment of 11 %. It is worth noting that the amount of water supplied to small towns has tripled since 2006/07. Close to 19 million

people live in rural areas, which are served by about 16,000 point sources and small, rural piped systems. According to a recent (World Bank report, 2011), most of the population relies on agriculture and safe water supplies that are limited.

Sanitation

Pit latrine coverage is used as a proxy measure of access to appropriate sanitation facilities. The Latrine Coverage at national level has continued to improve for the last five years. In 2010/11 it was 71 % compared to 59 % recorded in 2006/07, however, it is still way below the required national levels.

Key Players within Sector

- Ministry of Water and Environment
- National Water and sewerage Corporation
- Non Governmental Organisations (NGO's) including Water Aid
- Private sector – highly fragmented.

3.8.2 Demand Drivers and Resource Based Factors

Demand Drivers

- Increasing population.
- Regional demand from neighbouring countries including South Sudan.
- Long droughts and unpredictable weather patterns. The government cannot sufficiently promote water harvesting systems or provide irrigation equipment like small water pumping machines. This ushers in the need for irrigation schemes, hence increasing the demand for water sources.
- Urbanization too raises the demand for water and sanitation.
- The need for renovation or replacement of water and sewerage systems

Resource Base Factors

- Plenty of fresh water resources
- Universities and colleges able to produce technicians and engineers to support the sector.

3.8.3 Investment Opportunities

1. Public Private Partnerships in providing piped water.
2. Private consortium to provide water and sewerage services.
3. Public Private Partnerships in the construction of water dams and reservoirs.
4. Investment in the production, bottling and distribution of natural mineral water. Management services and systems for the sector.
5. Manufacturers and suppliers of purifiers and other inputs.
6. Establishment of capacity building to cater for this specific area.
7. Irrigation schemes
8. Manufacture, sale and distribution of water equipment

Sector Specific Licensing Requirements

(Refer to Appendix 3)

Sector Specific Incentives for Investors

N/A

Useful Addresses and Contacts

Ministry of Water & Environment
P.O. Box 20026 Kampala – Uganda
Plot 21/28 Port Bell Road-Luzira
Tel: 256-414-505942/414-505945

Email: mwe@mwe.go.ug
<http://www.mwe.go.ug>

National Environmental Management Authority (NEMA)
NEMA HOUSE, Plot 17/19/21 Jinja Road
P O Box 22255 Kampala - Uganda
Tel: 256-414-251064/5/8
Email: info@nemaug.org;
URL:<http://www.nemaug.org>



Credit: Photo/Newvision

3.9 Health Sector

3.9.1 Size and Structure

Health units in Uganda are classified into hospitals, health centres IV, III and II. Their number has been increasing in recent years. In 2011, the total number of health units increased by 11.9% to 4,981.

The number of health units categorized under private for profit ownership increased by (43.9%) to 436 units.

Hospitals in Uganda are categorised as Referral, Regional and General Hospitals and were 143 in number in 2011. Of these, 2 were referral, 12 were regional and the rest general hospitals. In 2011, Government owned the highest percentage of hospitals in the entire country and its share stood at 46% followed by Private Not for Profit at 43% and 11% was Private for Profit.

The World Health Organization (WHO) observes that Uganda's doctor-to-patient ratio is low, there is high morbidity and mortality that are attributed to preventable, communicable diseases e.g. malaria, HIV/AIDS and diarrheal diseases, with women and children bearing a disproportionate amount of the burden of disease.

Figures from the ministry of Health show that malaria alone kills 320 Ugandans daily.

In addition, to healthcare units described above, Uganda has thousands of private medical clinics and pharmacies scattered across the country.

3.9.2 Demand Drivers

- Raising consumer incomes and corresponding ability to purchase healthcare.
- Inadequate health services and after care.
- Increased population.
- Low doctor to patient ratio.
- Increased need for specialized health and after care services.
- Extended life expectancy
- Emergence of advanced medical treatments and technologies.
- Changing dietary needs.
- More people seeking medical services. In 2010/11, there were 34.9 million Out Patient Department visits as compared to 36.8 million visits in 2009/10, thus posting an average OPD per capita utilisation of 1.0 %
- Increased use of health insurance services.
- New innovations in the health sector including drug discoveries.
- Use of herbal remedies
- Government policies to improve the sector encouraging people to visit medical facilities
- Increasing level of public awareness of health issues

Key Trends

There has been a general improvement in mortality levels over time. Mortality Rate (IMR) and Under Five Mortality over the period 1995 to 2011. The IMR declined from 97 to 54 deaths per 1,000 live births between 1995 and 2011, while the under five mortality declined from 162 to 90 deaths per 1,000 live births over the same period.

3.9.3 Investment Opportunities

1. Investment in specialized hospitals and clinics.
2. Nursing and care homes.
3. Infrastructure development
 - Under Public Private Partnerships (build own operate and transfer-BOOT and Build operate and transfer -BOT models).
 - Medical equipment leasing
 - Pharmaceutical and medical equipment research and marketing
 - Medical specialist exchange programs
 - Medical information technology
 - Tele-medicine
 - Health care financing and management
 - Medical training
 - Natural chemotherapy research
 - Clinical research
4. Processing medical sundries and surgical equipment manufacturing
5. Manufacture of diagnostic materials, reagents and equipment.
6. Manufacturing packaging materials and raw materials
7. Setting up of diagnostic equipment and materials.
8. Manufacturing of human vaccines
9. Pharmaceutical plant
10. Supply of medical, dental and other medicines.
11. Air ambulance
12. Disposal services

Sector Specific Licensing Requirements

Health is a regulated sector. Refer to the Ministry of Health and the East African Community General exemption 5th schedule. (Refer to Appendix 3)

Sector Specific Incentives for Investors

- Government provides subsidies amounting to 20% of the total revenue for the private not-for-profit practitioners.

3.9.4 Useful Addresses and Contacts

Ministry of Health,
P.O. Box 7272 Kampala Uganda
Plot 6 Lourdel Rd, Nakasero;
Tel: 256-414-340874 /231563 /9,
PS' Office: 256-414-340872
Email: info@health.go.ug

Website - <http://health.go.ug>

National Drug Authority
P. O. Box 23096 Kampala, Uganda
Secretariat Office,
46/48 Lumumba Avenue.
Tel (+256) 41 255665 / 347391/2
Fax. (+256) 41 255758
Email: ndaug@nda.or.ug
www.nda.or.ug/

Pharmaceutical Society of Uganda
Plot 22 Tufnell Drive, Kamwokya Kampala
P.O. Box 3774, Kampala, Uganda.
Tel:256-414-348796
Email:psupc@psu.or.ug



Credit: Photo/Newvision

3.10 Information, Communication and Technology Sector

3.10.1 Size and Structure

The Ugandan ICT market is growing at a cumulative annual growth rate (CAGR) of above 25%. This double digit growth has been registered over the last 5 years since 2008. The sector is mainly comprised of; provision of voice and data communication services, ICT training, website development and maintenance, business process outsourcing as well as custom software development. This upward trend is expected to continue as long as new players join the market.

The bulk of investment expenditure has been in the roll out of mobile broadband solutions and other Internet related infrastructure. Investment in the sector is expected to grow in the near future as the new service providers expand their networks coupled with the expenditure for the 3rd phase of

the national backbone infrastructure network. Due to its cross-cutting nature, the ICT sector plays a very big role in employment, job creation and quality/efficiency in other services delivery. For decades, the ICT sector in Uganda has been revolving around the Telecommunications, Postal and Broadcasting services.

The sector has now grown at a phenomenal rate especially in the areas of mobile devices, computer applications, information processing, storage and dissemination (Broadcasting and Internet Points of Presence at district levels) as well as m-finance, e-finance, global connectivity and online trade. The posts and telecommunications services activities accounts for more than 3.3 per cent of GDP.

3.10.2 Key Features of the Sector and Trends

Market penetration

Sector dynamism is a result of Uganda's good ICT legal and regulatory framework, a stable macroeconomic environment and economic reforms pursued since the early 1990s. The telecommunications sub-sector, formerly dominated by a single national operator, has been progressively liberalised over the last 10 years.

Fixed-line and DSL penetration is low but has seen a renaissance recently on the back of wireless local loop (WLL) rollouts, prepaid services and an increasing demand for broadband access. Table 19 below shows the estimated market services penetration rates in Uganda's telecommunications sector as of end of 2011.

Table 19: Telecommunications statistics 2007- 2011

| Service | 2007 | 2008 | 2009 | 2010 | 2011 |
|----------------------------------|-----------|-----------|-----------|------------|------------|
| Mobile subscribers | 5,163,414 | 8,554,864 | 9,383,734 | 12,828,264 | 16,696,992 |
| Telephone traffic ('000 minutes) | 3,004,738 | 4,268,705 | 7,146,567 | 10,037,722 | 13,028,046 |
| Payphones | 27,999 | 52,515 | 94,896 | 104,385 | n.a |
| Mobile cellular operators | 3 | 4 | 6 | 6 | 6 |
| Private FM Radio stations | 195 | 220 | 228 | 238 | 263 |
| Private Analogue TV stations | 41 | 50 | 55 | 55 | 64 |
| Major postal operator | 1 | 1 | 1 | 1 | 1 |
| Courier services operators | 20 | 21 | 29 | 30 | 35 |

Source: UBOS Statistical Abstract 2012

The cost of international bandwidth has been reduced dramatically following the landing of the first international submarine cables on the East African coast in 2009/10. Uganda is now connected. This has caused a spur in growth of capacity with the international bandwidth by 5-fold.

Economic Activities in the Sector

Revenue drivers

The mobile market accounts for 63% of the telecom revenue followed by the fixed line segment.

Telecom Revenue Distribution

Revenues as well as Value Added Services:

The entry of new operators has resulted in the emergence of a whole sale infrastructure market as new entrants adopt the infrastructure leasing approach to the market entry.

Market penetration for voice is currently at 33.5% with population coverage of close to 100%. Mobile subscriptions account for more than 90% of new connections (figure 8) whereas, fixed wireless terminals account for more than 60% of the total fixed lines.

3.10.3 Demand Drivers

- A liberalized and well regulated ICT Market, which has created a conducive environment for private sector investment
- Increased demand for banking services
- Increased literacy
- Young growing population
- Positive government policies

E-readiness of the Ugandan society

allows for the development of various technology services directed to local, regional and global markets. These include investments in high bandwidth infrastructure, fibre optic connectivity, and countrywide submarine backhaul trunks.

Communications Infrastructure

The government is implementing the National Data Transmission Backbone Infrastructure and e-Government Infrastructure (NBI/EGI) project for high speed communications. This entails laying of Fibre Optic Cables and installation of related equipment, which include switches, optical transmission equipment, data communication equipment, fixed network equipment, video

equipment, computers, servers, training and services. This fibre optic cable is linked to the submarine cables at Mombasa.

Latent local market Potential:

70% of the Ugandan population is below 20 years of age.

Low cost of operational licenses:

Uganda has the lowest ICT licensing and services regimes in Africa.

A highly skilled labour force

with good training background.

E-government infrastructure (EGI)

The deployment of the e-government platform increases the transparency of government activities, enables departments to share public data and enhance inter-departmental coordination, reduces government administration costs, and generally improves work efficiency.

3.10.4 Players and Key Trends in the Sector

Communications Technology

The ICT regulation policy advocates for a technology neutral approach and currently, there are many networking elements at play in Uganda.

Table 20: Technology Platforms of Service Providers

| Technology Platform | | Service Providers |
|---------------------|----------------------------------|---|
| 1 | 3G, GPRS and CDMA | UTL, MTN, Airtel, Warid, Orange Uganda Limited |
| 2 | Fibre and DSL | UTL, MTN, Kampala Siti Cable, Infocom, Roke Telecom |
| 3 | ISDN and Leased Lines | UTL, MTN |
| 4 | VSAT | Afsat Communications (U) Ltd, UTL, MTN, Africa Online Ltd, Maisha Networks Uganda |
| 5 | Other Wireless (Including Wimax) | Foris Telecom (in), Datanet, Infocom, Nomad Communications (Tangerine), TMP (Broadband Company), All Telecoms |

Source: Uganda Communication Commission

3.10.5 Investment and Business Opportunities

1. Business Process Outsourcing (BPO) and Knowledge Process Outsourcing (KPO)
 2. ICT Technology Parks: these will boost the development of BPO Incubation and Innovation systems.
 3. E-Commerce & M-Commerce Solutions and B2B solutions.
 4. Software Development.
 5. Software Testing & Assurance.
 6. Data Integration.
 7. Data Warehousing and Data Management.
 8. Integrated Solutions Planning
 9. Hardware Equipment Assemble.
 10. Multimedia Development and Music.
 11. Internet Applications.
 12. E-Translation Services.
 13. Rural Communications.
 14. Broadband Service Provision.
 15. Software Solutions for Financial Sector.
 16. Network Computing /Management software.
 17. Intranet Internet & Extranet Applications.
 18. Professional Solutions for Manufacturing Industry. IT Education and Specialized Training and
 19. Information Security and Management.
 20. Setting up IT virtual zones
 21. Website support and maintenance
 22. Search Engine Optimisation
 23. Uganda government through NITA-U is inviting Ugandans in Diaspora to participate in ICT projects listed under:
 - Set up and operationalise an E-Justice system aimed at automating the Uganda Justice system starting with the Commercial Courts. Government is looking for investment, set up and operation.
 - Establishment and operation of District Information Business Centers across Uganda. The centers will be used by members of the public providing access to Internet and document processing services.
 - Set up and operationalise an E-Cabinet system, which will serve as a database and communication portal.
 - Cabinet sensitization and ICT training. The provider will enter into a contract to supply trainers to train Cabinet, and top Government officials across all Ministries, Departments and Agencies.
 - Set up and operate a Messaging and Collaboration communication system for Government mail, Voice over Internet Protocol (VoIP) and document sharing.
 - Government IT Help Desk. The infrastructure is already set up. Contractor will supply Technical knowledge, and IT support staff.
 - Operation of a government call centre. The infrastructure has already been set up by government. The operator will supply services to government under contract.
- Creation of a National Data Bank to collect and store government data. The project is to be funded through a Public Private Initiative (PPI).
 - Establishment and operation of an E-Government academy, which will be used to train civil servants and other public sector workers.
 - Government Inter Operability framework project to link and enable IT systems across government ministries and departments to communicate with each other. This project will be funded through PPI.

Sector Specific Licensing Requirements

(Refer to Appendix 3)

3.10.6 Incentives

Specific Sector Related Incentives

Reduced taxes and tax waivers on computer and their accessories.
Free land in UIA industrial parks.

3.10.7 Useful Addresses and Contacts

| | |
|--|--|
| <p>Ministry of Information and Communications Technology 4th Floor Social Security House Jinja Road PO Box 7817 Kampala Uganda Tel: 256-414-236262 Email: webmaster@ict.go.ug http://www.ict.go.ug</p> | <p>Uganda Communications Commission Plot 42-44 Spring Road Bugolobi P.O.BOX 7376, Kampala, Uganda. Next to National Forestry Authority Tel: +256 414 339000/ 312 339000 Fax: +256 414 348832 Email: ucc@ucc.co.ug . Website :www.ucc.co.ug</p> |
| <p>National Information and Communications Authority Uganda (NITA-U). Palm Courts Plot 7A Rotary Avenue (Lugogo Bypass) Website:: www.nita.go.ug Tel: +256 414 705720, +256 414 705710 Fax: +256 414 251 775</p> | |



Credit: Photo/Newvision

3.11 Education

3.11.1 Size and Structure

Education is a top priority sector of the Government of Uganda. It is regarded as an engine for the acquisition and development of skills required in order to promote sustainable development.

A number of policy developments have been achieved in the sector, notable among them is the liberalization of education allowing private sector participation. This has transformed education services into a regional export.

Uganda has institutionalized Universal Primary Education (UPE) and Universal Secondary Education (USE) to narrow and eventually eliminate the literacy and gender gap. This strategy has increased the Net Enrolment Ratio (NER) to 91%.

The structure of Uganda's Education System

Uganda follows the 7-4-2-3 year education system. The structure also offers a number of options for those who find it difficult to go straight at each of these transition points.

The Size of the Sector

Table 21: Education Institutions in Uganda, Enrolment and Staffing

| | 2,005 | 2,006 | 2,007 | 2,008 | 2,009 | 2,010 |
|---------------------------------------|---------|---------|---------|-----------|-----------|-----------|
| Name of Institution | | | | | | |
| Primary Schools | 13,576 | 14,385 | 14,728 | 15,962 | 17,127 | 17,865 |
| Secondary Schools | 1,961 | 2,286 | 2,644 | 2,908 | 3,149 | 3,234 |
| PTCs (former TTCs) | 45 | 45 | 45 | | | |
| Technical Schools & Institutions | 62 | 62 | 62 | | | 5 |
| NTCs | 10 | 10 | 10 | 10 | 8 | 7 |
| UTCs | 5 | 5 | 5 | 5 | 6 | |
| UCCs (Private) & Government | 5 | 5 | 5 | 46 | 48 | |
| Universities (Government) | 5 | 5 | 5 | 5 | 5 | 7 |
| Universities (Private) | 13 | 14 | 14 | 17 | 19 | 25 |
| Number of Teachers, Tutors, Lecturers | | | | | | |
| Primary Schools ('000) | 145 | 150 | 152 | 159 | 168 | 172 |
| Secondary Schools | 37,607 | 42,673 | 50,767 | 57,007 | 65,045 | 62,921 |
| PTCs (former TTCs) | n.a | 1,310 | 995 | | | |
| Technical Schools & Institutions | n.a | n.a | 915 | | | |
| NTCs | 369 | 372 | 328 | | 289 | |
| UTCs | 38 | 134 | 127 | | 127 | |
| UCCs | 167 | 167 | 173 | | 1,076 | |
| Universities (Government) | 1,778 | 1,729 | 1,388 | | 2,092 | |
| Universities (Private) | 819 | 872 | 807 | | 1,835 | |
| Student Enrolment | | | | | | |
| Primary Schools ('000) | 7,224 | 7,362 | 7,537 | 7,964 | 8,297 | 8,374 |
| Secondary Schools | 728,393 | 814,087 | 954,328 | 1,088,744 | 1,194,454 | 1,226,000 |
| PTCs (former TTCs) | n.a | 19,447 | 18,343 | | | |
| Technical Schools & Institutions | n.a | 13,417 | 11,219 | | | 3,250 |
| NTCs | 15,494 | 15,807 | 12,192 | | 10,997 | 7,842 |
| UTCs | 985 | 1,069 | 1,110 | | 1,980 | 3,250 |
| UCCs | 3,462 | 3,574 | 3,557 | | 18,181 | 5,556 |
| Universities (Government) | 44,928 | 47,178 | 36,323 | 42,976 | 53,845 | 74,729 |
| Universities (Private) | 12,216 | 18,034 | 38,210 | 40,111 | 53,883 | 65,340 |

Source: UBOS Statistical Abstract 2012

3.11.2 Key Features of the Sector

Competitiveness of the Uganda's Education Sector

Uganda's education sector is the most competitive within the Great Lakes region. It is renowned for its:

- Quality of education: this is high at all levels and has progressively improved overtime.
- Excellent curricula and demand driven unique courses.
- Competitive and affordable maintenance and tuition fees.
- Use of English as a medium of instruction/teachings at all levels.
- A welcoming culture.
- Ugandan teachers/instructors are knowledgeable of the training needs of the region.

Workforce Skills and Availability of Special Skills

The education sector is resourced with immense skills at various levels. As of 2009, at the primary education level, there were 168,000 teachers with various qualifications: Doctorate degrees (20);

Masters' degrees (125); Postgraduate Diplomas (123); Graduates 2,496 etc.

These numbers have increased steadily from the 2006 levels to match the quality parameters. For instance, in 2006, there were 1,627 graduates teaching in primary schools and only 9 PhD and 73 masters' degree teachers respectively at this level. At the secondary level, as of 2006, there were 42,673 teachers with various qualifications but by end of 2009, the number had shot up to 65,045 teachers, an increase of almost 35% in a space of 3 years.

At the tertiary level as at end of 2009, there were over 7,000 academic staff comprising of both full-time and part-time lecturers with various skills, qualifications and disciplines.

The categories of academic attainment were as follows: PhD (815); Masters degrees (2,901); Bachelors (1,240); Postgraduate Diplomas (224); Diplomas (703), among others. Most of the training institutions have own staff development programmes to cope with the ever increasing number of students so as to maintain the quality standards of student/lecturer ratios. Government also has a number of training programmes with development partners in critical areas of the economy where the various tertiary institutions can benefit from in order to upgrade their staff skills and numbers.

3.11.3 Key Players in the Sector

Table 22: Government, Private and Community

| Type of Ownership | Number of Universities and other Tertiary institutions | | Number of Secondary schools | | Number of other Post-Primary Schools | | Number of Primary schools | | Number of Pre-primary school | |
|-------------------|--|---------------|-----------------------------|---------------|--------------------------------------|---------------|---------------------------|---------------|------------------------------|---------------|
| | No | % | No | % | No | % | No | % | No | % |
| Public | 53 | 34.2% | 807 | 34.7% | 101 | 87.1% | 11,643 | 81.0% | 15 | 2.1% |
| Private | 102 | 65.8% | 1,064 | 45.7% | 5 | 4.3% | 1,877 | 13.1% | 490 | 68.3% |
| Community | 0 | 0.0% | 455 | 19.6% | 10 | 8.6% | 854 | 5.9% | 212 | 29.6% |
| Total | 155 | 100.0% | 2,326 | 100.0% | 116 | 100.0% | 14,374 | 100.0% | 717 | 100.0% |

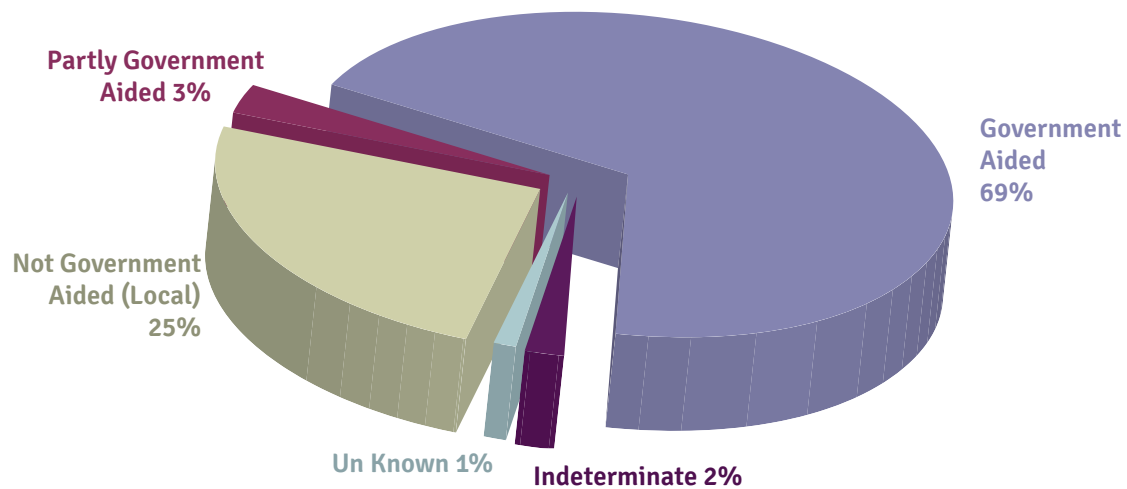
Source: The State of Higher Education A survey of Uganda's higher institution of learning, Uganda education statistics abstract

3.11.4 Status of the Sector at Various Educational Levels

The Universal Primary Education (UPE) Policy

Universal Primary Education (UPE) was implemented with effect from 1997, to broaden access to primary education, largely through reducing the costs involved. The primary school enrolment, which was about 3.1 million in 1996 rose to 5.2 million in 1997, an increase of about 68%. Since then, the number of schools and teachers has progressively increased over the years. Between 2005 and 2009, there was an increase of 3,551 schools representing about 21% increase or an average increase of 710 schools per year.

Figure 2: Primary Schools by Funding Source



Source: Statistical Abstract, 2010 (UBOS)

Of the 17,127 primary schools registered by the Ministry of Education as of December 2009, about 72% were owned by government, which is a drop by almost 10% from 2006 when government owned schools accounted for 81%. This is an indication that the private sector involvement since 2006 has intensified. Correspondingly, school ownership by the community has also decreased from 11% in 2006 to 5% as of 2009.

Overall, government still has greater control at this level of education owing to its policy of enabling all school going age children at this level to be in school. In terms of funding at this level, government is also shouldering a bigger percentage of schools whereby in 2009, it was providing funding to 69%

of the schools (11,800 schools) as well as partial support to another 3% of schools (i.e. 491 schools), a reduction by 74 schools from 2006. Figure 2, gives a diagrammatic presentation of the level of government support to schools by end of year 2009.

Secondary Education

This level has witnessed unprecedented growth rates by over 19% over the last 5 years in the enrolment of students, but is yet to attain the necessary capacity to cope with the large numbers of primary school leavers. Table 3 below shows the key indicators at secondary education level where the enrolment increased from 728,393 in 2005 to 1,194,454 students at end of 2009.

The tremendous increase is attributable to the introduction of universal secondary education in 2007. As of 2010, a total of 264,635 candidates sat the Uganda Certificate of Education Examinations (UCE), with 104,000 of them registering under the Universal Secondary Education scheme.

However, it is still seen that during the academic year 2010, there were 519,246 pupils who sat primary seven leaving examinations vying for about 300,000 places available at the next level of senior one. This indicates that if all candidates sitting their primary leaving examinations manage to qualify for the next level of education, then only 57% of them can be absorbed for secondary education, which calls for additional investments at this level by both government and the private sector.

Of the 3,149 secondary schools registered by the Ministry of Education as of December 2009, 69% were owned by others (i.e. the private sector and the community). Government owned only about 31% but in terms of funding, 24% of the schools were wholly supported by government. The introduction of Universal Secondary Education (USE) has increased the numbers of pupils leaving the primary level presenting a need for establishment of more secondary schools.

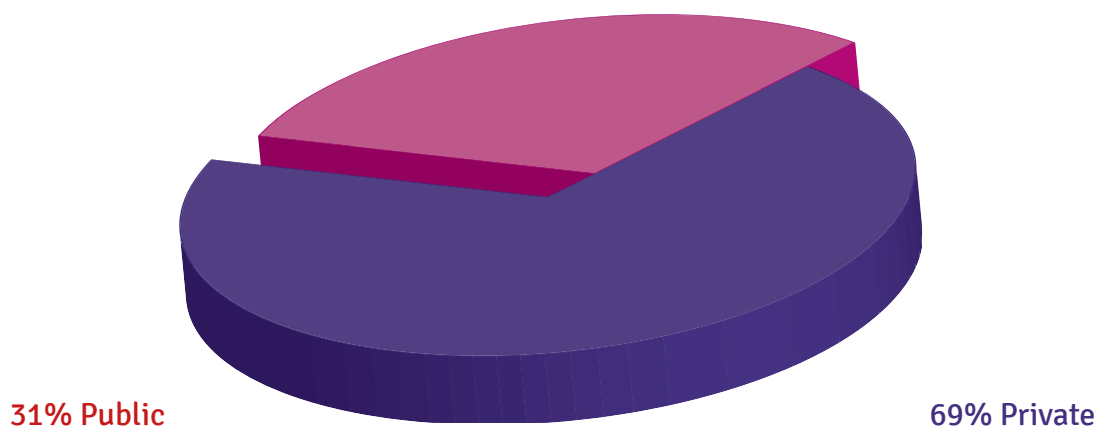
Tertiary Education

There are a number of education pathways at this level, with various categories of institutions that absorb students after senior six. These include; universities and their affiliates (currently 32 in number); teacher colleges (numbering 9); technical colleges; health colleges; management and social development institutions; business colleges; theological colleges; hotel and tourism training institutes; media and communications training centres; agricultural, forestry and fisheries colleges; meteorology; and aeronautical schools, among others.

In total, enrolment at tertiary level was 196,570 students as at 2011 with universities accounting for 71% of this total. Of the total university enrolment of 107,729, Makerere University alone accounted for 24%. It is also interesting to note that a lot of foreign students from neighbouring countries are attending tertiary education in Uganda and these accounted for 9% of total enrolment at various universities during the same period.

Figure 4 shows the share of universities by ownership type where presently the private sector owns about 69% of the total university establishments in Uganda and the public sector accounts for only 31%. This trend of private investment dominance in tertiary education is expected to grow overtime.

Figure 2: Share of Tertiary Education by Ownership



Source: Statistical Abstract, 2010 (UBOS)

Vocational Education Training Policy

Currently, government policy on technical education and Vocational Education Training (VET) aims at:

- Introducing changes necessary to create a favourable environment for industrial training and improvement in the effectiveness and efficiency in public training
- Provision of training by employers and the private sector
- Changing negative attitudes towards technical and vocational education
- Integrating technical and business/or entrepreneurial skills to enable students to enter self-employment
- Provision of at least one vocational secondary school in every district; and Introduction of vocational curriculum in primary and secondary schools.

The Business, Technical, Vocational Education and Training (BTVET) Strategy with the theme “Skilling Uganda” has been developed and funded to support vocational education and training over a 10-year period. It has a big component of non-formal education and work-based training among others. It has a national dimension with few public institutions in place to implement it. Private sector participation will be crucial in achieving the objectives of the strategy.

3.11.5 Investment Opportunities

- Investment opportunities occur at any level of the 7-4-2-3 education system
- Special needs schools
- International schools
- Technical and Vocational institutions
- In-Service Specialized Training Programmes
- Universities and tertiary institutions
- Community schools

- Talent schools e.g. dance and drama.
- Supplying goods and services to the education sector
- Hostels
- Management and ICT Skills Development institutions
- Investment in Centres of Excellence, specialized Academies and sports facilities

3.11.6 Sector Specific Licensing Requirements

Licensing is needed for all subsectors below:

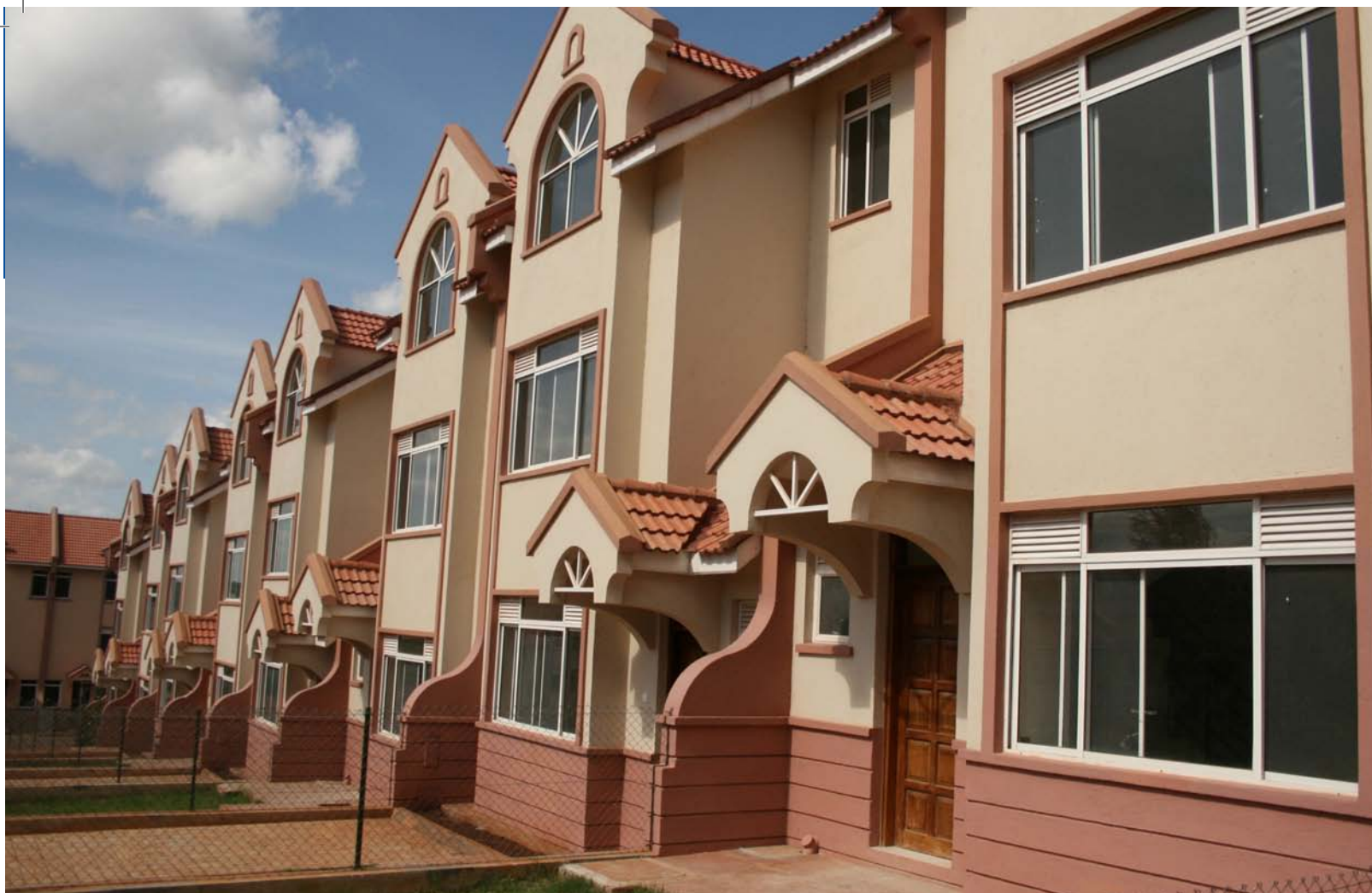
- Primary, Secondary Education and BTVET- Ministry of Education and Sports
- University and Tertiary Education – The National Council for Higher Education (Refer to Appendix 3)

Sector Specific Incentives for Investors

Education services are not subject to Value Added Taxes (VAT)

3.11.7 Useful Contacts for Institutions

| | |
|--|--|
| <p>For Investment Licensing: Uganda Investment Authority, P.O. Box 7418, Kampala, Uganda Tel. +256-41-4301000 Fax +256-41-4342903 Email: info@ugandainvest.com www.ugandainvest.com</p> | <p>For Regulatory Licensing Ministry of Education and Sports Plot 9-10, Parliament Avenue, Embassy House and Development House, P.O. Box 7063, Kampala, Uganda Tel. +256-41-4234451/4 Fax +256-41-4230437 www.education.go.ug</p> |
| <p>Taxes and Incentives Administration: Uganda Revenue Authority Headquarters: Nakawa Industrial Area, P.O. Box 7279 Kampala, Uganda Gen.lines: +256-41-4334000/1-10 Email: prte@ura.go.ug mgimbo@ugandainvest.com www.ura.go.ug</p> | <p>Business Registration: Uganda Registration Services Bureau Plot # 5, George Street, Amamu House Gen. lines: +256-41-4235915/2332 Fax +256-41-4250712 Official Receiver: +256-41-4345727 P.O. Box 6848 Kampala Email: ursb.go.ug</p> |
| <p>Regulatory Licensing of University/Tertiary National Council for Higher Education Plot 34, Cavers Crescent, P.O. Box 76 Kyambogo, Uganda Tel. +256-41-4285193 Email: NCHE@infocom.co.ug www.nche@go.ug</p> | <p>Curriculum Development National Curriculum Development Centre, Kyambogo P.O. Box 7002, Kampala, Uganda Tel. +256-41-4342715 Fax +256-41-4286145 www.ncdc@go.ug</p> |
| <p>Examination of Non-Higher Education Students Uganda National Examination Board, Ntinda P.O. Box 7066 Kampala, Uganda Tel. +256-41-4285193 Email: uneb@uneb.ac.ug www.uneb@uneb.ac.ug</p> | <p>Uganda National Council for Science and Technology Plot 10, Kampala Road – Uganda House Tel. +256-41-4705500 Fax: +256-41-4250499 Email: uncst@starcom.co.ug www.uncst@go.ug</p> |



Credit: Photo/Newvision

3.12 Housing

3.12.1 Size and Structure

Uganda's current housing stock is estimated at 5.28 million housing units with an average household size of 5 persons. The national occupancy density is estimated at 1.1 households per housing unit.

The sector on average accounts for 7.5 per cent of Uganda's GDP. Its growth is attributed to rapid population growth, increase in disposable income, increase in foreign direct investment, and immigrant remittances.

Table 23: Summary of the Housing Requirements by 2020

| Location | Estimated backlog 2009 Units | Estimated replacement needed Units | Estimated upgrading needed Units | Projected requirements by 2020 Units |
|-------------|------------------------------|------------------------------------|----------------------------------|--------------------------------------|
| Kampala | 82, 184 | 26,299 | 32,874 | 750,791 |
| Other Towns | 92, 730 | 37,092 | 46,365 | 1, 092,318 |
| Rural Areas | 532, 468 | 106,494 | 1,064, 935 | 8,482,889 |
| Nationally | 707, 382 | 169,885 | 1,144,174 | 10, 325,990 |

Source: National Housing and Construction Company

3.12.2 Status of Economic Activity in the Sector

Ugandans are by nature a house owning society. 86.1% of all rural dwellings are owned by families, which reside in them. In urban areas, 57% of all dwellings are rentals. The desire to own ones dwelling, increasing urbanization and population continue to drive business activity in the housing sector. As Kampala gets more congested, there are plans to build new towns and cities to ease that

congestion. The high cost of finance is a major constraint to the sector's growth. The requirements for accessing mortgage finance are so stringent, and therefore, unaffordable by a large section of the population. High interest rates on housing loans (currently above 20%) further limit growth in the sector.

3.12.3 Current Structure of Players in the Sector

The housing sector is dominated by the private sector except for a 49% Government stake in National Housing and Construction Company Ltd, the biggest housing construction company in Uganda. There are very few Real Estate development companies. The bulk of housing is commissioned by private individuals using mainly small building firms and private builders.

Key Players in the sector

The Ministry of Lands, Housing and Urban Development

The Ministry is responsible for issuing National Physical Planning Standards and Guidelines that govern construction of commercial and residential building.

The Land Registry, a department of the Ministry, registers properties and issues land titles. Property transfers are made through the Land Registry.

Some of the Ministry's functions and services are carried out by the local authorities.

Housing Finance Bank Uganda Ltd

The Bank is a pioneer in mortgage lending. Currently it holds 90% market share of mortgaging companies.

Uganda Society of Architects

The Uganda Society of Architects (USA) brings together architects in Uganda to regulate building standards in the construction industry.

Ministry Of Works Central Materials Testing Laboratory

Private Real Estate Development Companies

Private real estate companies include Jomayi, Hossana, Canaan Sites, Heritage Sites, Sema Properties and Zion Construction.

3.12.4 Demand Drivers

Demand Drivers for the Housing Sector:

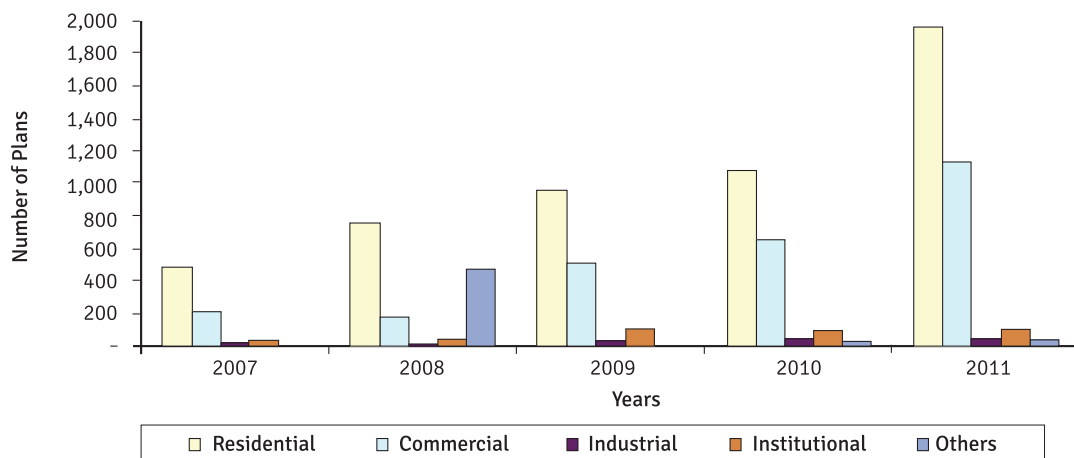
- The boom in the housing sector is the driving force that has pulled many real estate developers into committing huge financial resources to this sector. The challenges in the housing sector include; absence of proper legislation, no housing policy to regulate and accelerate the construction of housing units, but the government is underway with the enactment of such regulations.
- Rapid urbanization and the setting up of new districts and town councils.
- Urban slums are gradually becoming replaced with apartments to cater from the growing urban population
- Standards of living continue to rise in both urban and rural Uganda. That is driving growth in new housing and refurbishment of old ones.
- Rising disposable incomes that have enabled Ugandans to invest in better housing.

- Increase in Foreign Direct Investment (FDI)
- Uganda Diaspora remittances (Personal Transfers)
- Increase in the number of international organisations, foreign missions, non-governmental organisations, international businesses and trade organisations resident in Uganda.

3.12.5 Key Trends

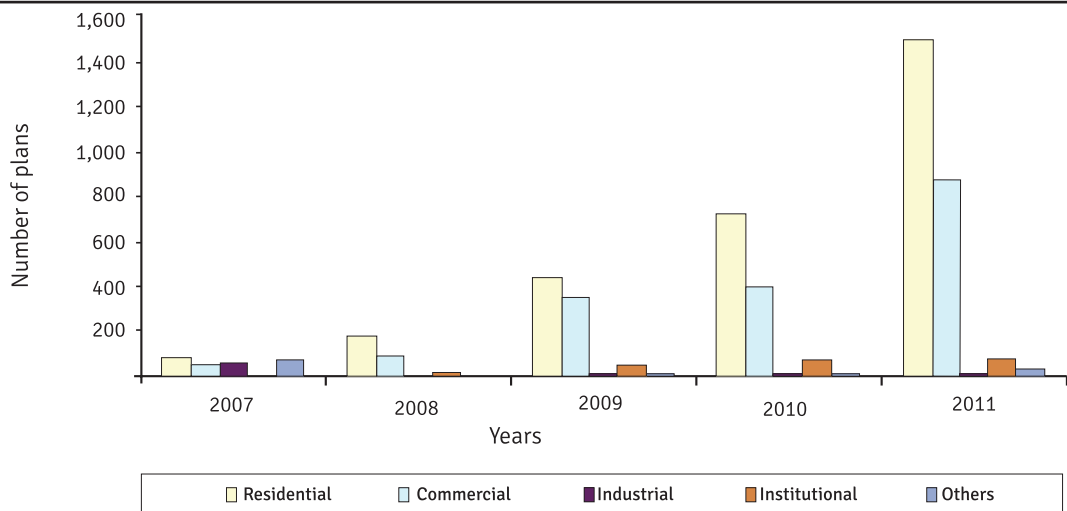
Housing construction activity has more than doubled since 2007 to 2011 as shown in the graph below. The graph shows data from Uganda Bureau of Statistics, based on plans for buildings obtained from across the country from 12 Municipalities, 44 Town Councils and the Divisions of Kampala District. Building Statistics are presented in the categories of Plans Submitted, Plans Approved and Permits Issued.

Graph 10: Plans Submitted, 2007 - 2011



Source: UBOS Statistical Abstract 2012

Graph 11: Plans Approved 2007-2011



Source: UBOS Statistical Abstract 2012

3.12.6 Investment Opportunities

- Low cost housing
- Medium cost housing
- Partnerships with utility companies in provision of infrastructure to real estate projects
- Partnerships with financial institutions to provide housing
- Partnerships with landowners in providing housing estates
- Commercial complexes and shopping areas
- Brick and tile making factories
- Real Estate Agencies
- Development of entertainment centres
- Partnership with local authorities in providing social infrastructure
- Partnerships with capital market resources to provide infrastructure
- Supply of building materials and equipment
- Supply of transport and logistics
- Architectural or engineering services
- Surveying

Specific Licensing Requirements

(Refer to Appendix 3)

Sector Specific Incentives for Investors

N/A

3.12.7 Useful Addresses and Contacts

Ministry of Lands, Housing & Urban Development
Plot 13/15 Parliament Avenue, Century Building
Box 7096 Kampala

Tel: 256-414-342931/373511

E-mail: mlhud@mlhud.go.ug, ps@mlhud.go.ug;
Website – <http://www.mlhud.go.ug>



Credit: Photo/Newvision

3.13 Tourism Sector

3.13.1 Size and Structure

Uganda is endowed with a unique Biodiversity. It has 10 national parks, with a variety of rare animals like the mountain gorillas, and tree climbing lions; shoebill birds and various plant species. Uganda's snow-capped Renoir Mountains are suited for all year-round hiking and mountaineering. It also has the "Source of the Nile", which has become a hub for adventure sports mainly white water rafting, bungee jumping, angling, kayaking and sightseeing.

The most distinctive of Uganda's wildlife assets, are the endangered mountain gorillas, of which 360 out of the 600 total worldwide are in Uganda. Other distinctive tourism attractions include chimpanzees, zebras, giraffe, hot springs, and one of the richest African birding species in the world (having recorded over 1200 bird species, or one sixth of the world's 8000 or so species).

The tourist sector has enjoyed sustained growth over the last 10 years. It is estimated that the tourism sector earned Uganda US\$570 millions in FY2011/12. This is higher than the cash crops sector earnings.

A total of 1,151,356 tourists were registered in 2011 indicating a 21.6% increase from 945,899 in 2010. There was a 36.8% increase in the number of visitors from Europe and a 29% increase in number of visitors from Africa. The majority (52 %) were in the country to visit friends and relatives, followed by those for whom the purpose of visit was not stated (20 %), on businesses (14 %) and on holiday (7 %).

A large number of tourists come by road although the growth in terms of arrivals by air appears to be picking up much faster.

Hotels and Restaurants

Tourists consume a host of goods and services including transport services, hotel, crafts and communication services. Most of the services are provided by the private sector.

The hospitality industry grew by 20.6% in FY2011/12. Lonely Planet has described Uganda as a world top tourist destination for 2012. Hotels and restaurants account for 5 % of the total GDP at current prices.

Graph 12: Contribution of Hotels and Restaurants



Source: UBOS Statistical Abstract 2012

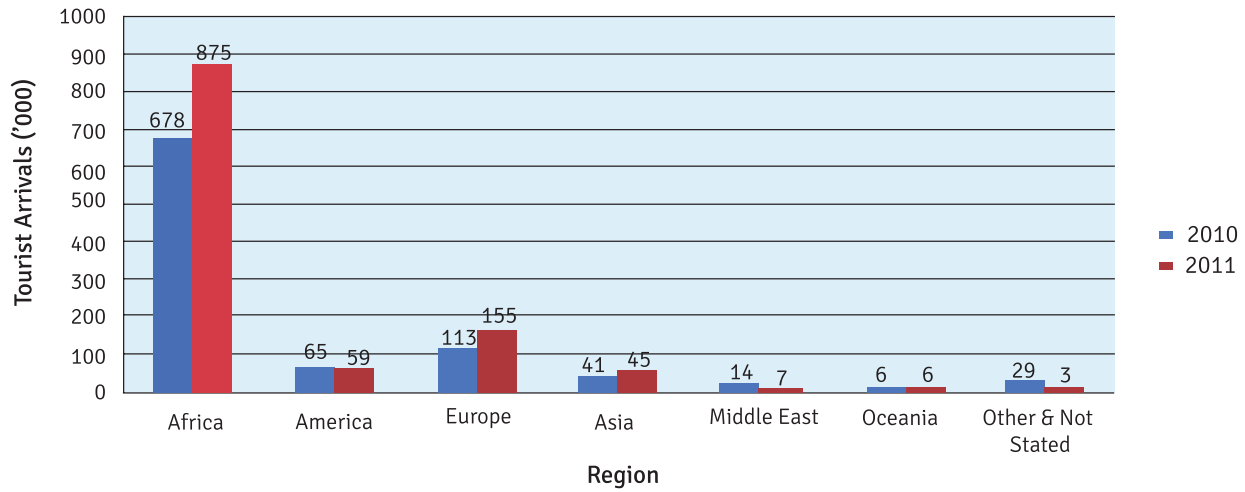
Uganda's current tourist products are nature-based and centred on distinct geographic areas. Several of these are linked to national parks, wildlife reserves, forests reserves or specific attractions, and activities such as white water rafting. The nature of attractions include: Eco-Tourism, Cultural Heritage, Faith-Based Tourism, Community Development Tourism and Meetings, Incentives, Conferences and Events (MICE).

3.13.2 Status of Economic Activities

Tourist Arrivals

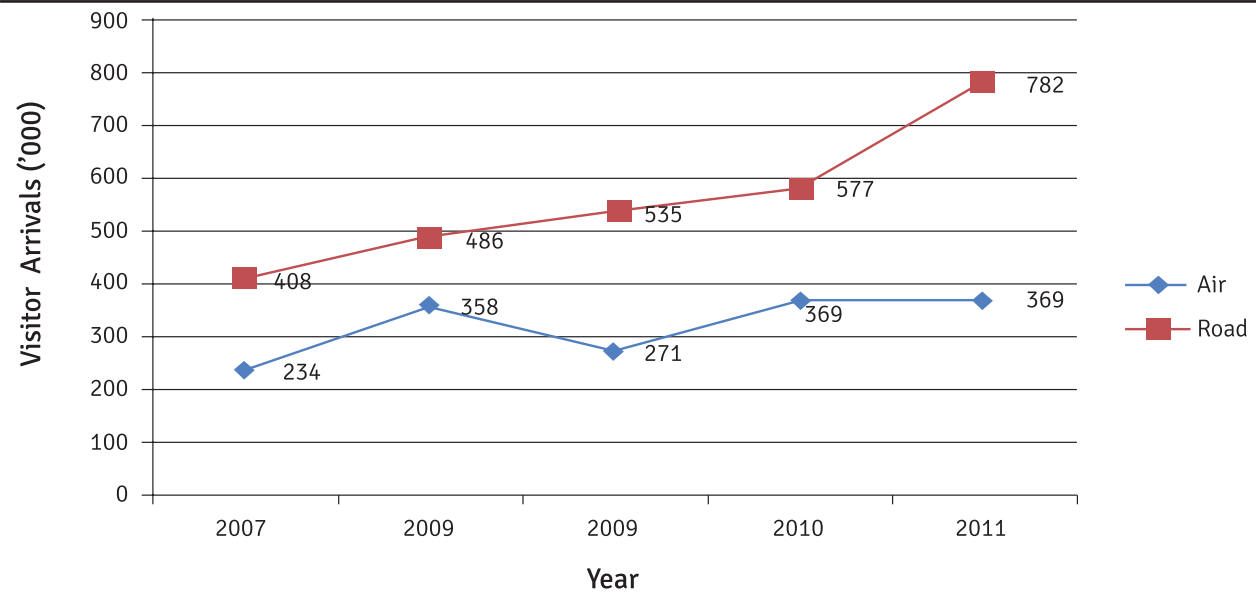
Total tourist arrivals and departures in the country have steadily increased over a 3 year period (2009 – 2011). For the year 2011, they totalled to 1,151,356 compared to 945,899 in 2010 translating to an increment of about 21.6%. The table below shows that the majority of Uganda's tourists came from Africa.

Graph 13: Tourist Arrivals by Region



Source: Uganda Bureau of Statistics

Graph 14: Visitor Arrivals By Mode Of Transport



Source: Uganda Bureau of Statistics

3.13.3 Current Structure of Players In The Sector

Tourism Services

Private sector providers of tourist services are - small and fragmented. There are approximately, 162 tour operators and 155 travel agencies operating in Uganda, of which 143 and 151, respectively, were based in Kampala. Local tour operators and travel agents play a very small role as the main distribution platform for tourism products.

Statutory Institutions:

- The Ministry of Tourism, Wildlife and Heritage
- Uganda Tourist Board (UTB)
- Uganda Wildlife Education Centre (UWEC)
- The Hotel and Tourism Training Institute (HTTI)
- Uganda Wildlife Authority (UWA)
- Hotel Owners and Operators' Association
- Association of Uganda Tour Operators (AUTO)

3.13.4 Demand Drivers And Resource Base Factors:

Demand Drivers

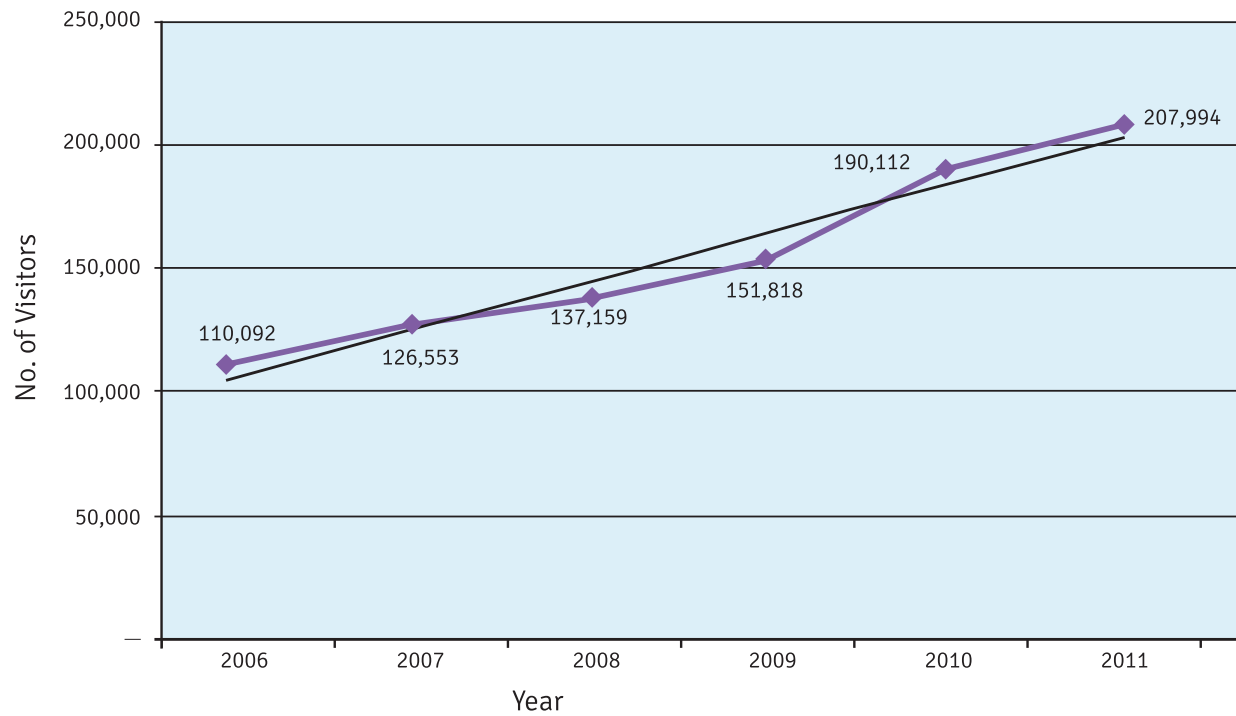
- Uganda is 6-7 hours away from major tourist sources in Western Europe by air
- Ugandans are friendly and welcoming to foreigners
- Uganda is enjoying an era of sustained social political and economic growth
- Uganda has a liberal economy with no currency restrictions.
- Tourists from the European Union can obtain Visas on arrival.
- Government has a proactive policy to promote tourism

Resource Base Factors

- Game reserves
- Forest reserves
- Bird sanctuaries
- Crater lakes with lots of birds
- Rivers with waterfalls
- Fresh water lakes
- Uganda's cuisine
- Uganda's rich and diverse cultures
- Unique Biodiversity
- 10 National Parks
- Snow capped mountains
- Uganda's consistent good weather all year round

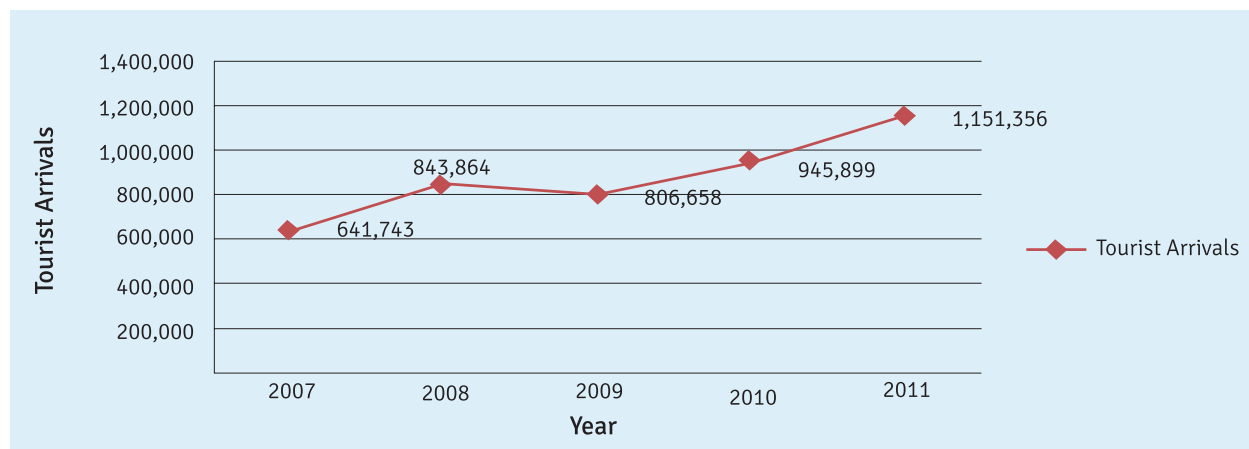
Uganda's beaches with soft sands

Graph 15: Trend of the Total Number of Visitors to National Parks (2007-2011)



Source: Uganda Wildlife Authority

Graph 16: Trend of Total Tourist Arrivals, 2007-2011



Source: Uganda Bureau of Statistics

3.13.5 Key Trends

Tourism expenditure and contribution to Uganda's foreign exchange earnings has more than doubled over the last 6 years as the graph below illustrates.

Graph 17: Tourism Expenditure In The Country



Source: Uganda Bureau of Statistics

3.13.6 Investment Opportunities

There are opportunities to invest in all tourism related subsectors. These include:

- Partnerships and alliances with international tour operators with access and operation in international markets to expand the network for Uganda's tourism sector and also bring best practices in this area.
- Setting up and operating franchised branded 3-4 star international tourist hotels.
- Budget 2-3 star tourist hotels
- Self Drive Car Hire services
- Construction of Time Share Holiday homes and Tourists Resorts
- Developing and running Golf Course and Beachside tourist holiday homes and apartments
- Setting up Eco Tourism sites such as hotels and camping sites.
- Tourist Services to provide travel and tour operator services

- Niche travel related websites and search engines focussed on Uganda and the East Africa regional tourist market.
- Setting up and operating franchised International fast food coffee shops and restaurants brands such as Starbucks, Costa Coffee, McDonalds, Burger King, Kentucky Fried Chicken and Nandos. Entertainment and leisure canters (theatres, cinemas and night life clubs)
- Boating, anglers and water sports on Uganda's rivers and lakes
- High end themed restaurants in Kampala.
- Boat hire services.
- Community based tourism.
- Budget airline services for the tourist sector.
- Cultural Villages.
- Wildlife farms.
- Tourism and hospitality colleges.

Sector Specific Licensing Requirements (Refer to Appendix 3)

Sector Specific Incentives for Investors

- 20% initial allowance granted in 1st year of use of an industrial building.
- 5% industrial building allowance.
- Exemption of international trade taxes on hotel equipment.
- Supply of accommodation in tourist lodges and hotels outside Kampala district are exempt from tax.



Credit: Photo/Newvision

3.13.7 Useful Addresses and Contacts

| | |
|---|--|
| <p>Ministry of Tourism, Wildlife and Heritage P.O Box 7103, Kampala. Floors 3, 4, 5 and 6, Farmers House Plot 6/8, Parliamentary Avenue Tel: +256 41 343947, +256 41 30916 and +256 41 256395, Fax: +256 41 341247 Website: www.tourism.go.ug</p> | <p>Uganda Tourism Board 42 Windsor Crescent, Kololo P.O. Box 7211, Kampala, Uganda. Tel: +256 (414) 342 196/7 Fax: +256 (414) 342 188 Email: utb@tourismuganda.info www.visituganda.com</p> |
| <p>Uganda Wildlife Authority Plot 7 Kira Road, Kamwokya. P.O. Box 3530, Kampala, Uganda. Telephone: +256 414 355000, +256 312 355000 Fax: +256 414 346 291 Email: info@ugandawildlife.org Website: www.ugandawildlife.org</p> | <p>Uganda Wildlife Education Centre P.O Box: 369 Entebbe-Uganda, East Africa Tel: +256 414 320 520, +256 414 322 169/171/172 Fax: +256 414 320 073 E-mail: reservation@uwec.ug, marketing@uwec.ug http://www.uwec.ug</p> |
| <p>Hotel and Tourism Training Institute P.O Box 444, Jinja, Uganda Email: htti_crested@utlonline.co.ug +256 (0)43 121 954 +256 (0)43 121 515</p> | |



Credit: Photo/Newvision

3.14 Trade

3.14.1 Size and Structure

The trade sector comprises of manufacturing, wholesale & retail trade, hotels & restaurants, other business services, exports and imports.

Table 24: Size and structure of the Trade Sector 2011/2012

| Subsector | Contribution to GDP% | Equivalent in Ugx (Billions) |
|--------------------------------|----------------------|------------------------------|
| Manufacturing | 8.4% | 4,130 |
| Wholesalers & retail & repairs | 13.3% | 6,541 |
| Hotels & restaurants | 5% | 2,468 |
| Exports | 20.3% | 9,974 |
| Imports | 37% | 18,179 |
| Other business services | 1.5% | 755 |

Source: UBOS Abstract 2012

Economic Activity in the Sector

Manufacturing sub sector:

The sector is still small but diverse in terms of its composition. Food processing makes up 40% of all manufacturing; drinks and tobacco 20%; chemicals, paint, soap and foam products 9.7%.

Wholesale and Retail Trade:

Uganda has a buoyant and growing wholesale and retail sector but it is still highly fragmented.

Hotels & Restaurants:

This subsector has enjoyed sustained growth fuelled by a growing economy and increasing tourist numbers.

Imports

In 2011, the total imports bill stood at US \$ 5,684.8 million, of which, formal imports accounted for US \$5,630.9 million. Informal imports were estimated at US \$ 53.9 million.

The overall imports expenditure rose by 20.2 % in 2011 compared to an increase of 9.0 % in 2010. Although, the formal imports bill increased over two consecutive years (2010 and 2011) informal imports maintained a stable decline of 18.9 % in the same period. In 2011, Petroleum and petroleum products still took the highest import bill of US\$ 1,288.4 million accounting for 22.9 % of the expenditure on imports. This was followed by road vehicles at US \$499.7 million (8.9 %), telecommunication instruments US\$ 343.4 million (6.1 %) and iron and steel valued at US \$ 271.0 million (4.8 %).

Exports

Traditional Exports

- Coffee
- Cotton
- Tea
- Tobacco
- Timber
- Hides and skins
- Minerals (gold)

Non-Traditional Exports

- Fish and fish products
- Cellular telephones
- Animal fats
- Vegetable fats and oils
- Cement
- Horticulture
- Apiculture
- Food stuffs

3.14.2 Direction of Trade

The Common Market for Eastern and Southern Africa (COMESA) regional bloc is the main destination for Uganda's exports. The EU bloc ranks second, followed by the Asian continent, and then the Middle East.

The main trading partners within the Asian continent were India, China and Japan whose market shares stood at 16.3%, 9.2% and 5.7% respectively in 2011. The African continent ranks second, with an import expenditure of US \$ 1,148.3 million in 2011 and accounting for 20.2% of the total imports.

3.14.3 Current Structure Of Players In The Sector

Manufacturing:

The manufacturing sub-sector is characterized by Small and Medium Enterprises (SMEs), which account for over 90% of the sub-sector. 39% of these are agro-based industries. Large industries include: Madhivani and Mehta sugar factories; Uganda Breweries; Nile Breweries; Hima Cement and British American Tobacco plant.

The majority of these are owned by families or individuals. Multinational companies in Uganda's manufacturing sector include British American Tobacco - Tobacco; SAB Miller and Diageo - Drinks; and Lafarge - Cement and aggregates.

Table 25: Export Incentives

1. Foreign Exchange Liberalization

The foreign exchange regime is fully liberalized and exporters are entitled to retain 100% of their foreign exchange earnings accruing from their export transactions. - Contact Bank of Uganda or any commercial bank for details

2. Duty and VAT exemptions

There are no taxes charged on exports (zero rated). This is meant to reduce costs for the exporters and to make exports from Uganda more competitive - Refer to Uganda Revenue Authority

3. Market Access

The Government of Uganda strongly supports global economic integration as it increases volume of trade as well as offers other economic opportunities. Because of our membership, Uganda's exports qualify for preferential tariff rates in COMESA, EAC. In addition Ugandan products enter the European Union and USA markets duty and quota free under the Cotonou Agreement (ACP – EU) and the African Growth and Opportunity Act (AGOA) initiatives respectively. - For details refer to Trade Agreements Page

4. Value Added Tax (VAT) on Exports

All exports of goods and services are zero rated for VAT. However, exporters are required to be VAT registered. This enables them to re-claim VAT expended on all inputs used in the process of producing and processing exports. - Contact Uganda Revenue Authority

5. Duty Drawback

The rationale for duty drawback is to enable manufacturers and other exporters to compete in foreign markets without the handicap of including costs of imported inputs in the final export price, the duty paid on imported inputs. This allows exports to draw back up to 100% duties paid on materials inputs imported to produce for export. - Contact Uganda Revenue Authority

6. Manufacturing under Bond

This scheme allows manufacturers to seek custom license to hold and use imported raw materials intended for manufacture for export in secured places without payment of taxes. It makes available working capital, which would have been tied up through paying duties immediately after importation. - Contact Uganda Revenue Authority

7. Others

Other incentives are available under the Investment Code as administered under the Income Tax Act 1997, by Uganda Revenue Authority for export oriented investment projects. - Contact Uganda Revenue Authority.

Source: Uganda Export Promotions Council

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7. Others

Other incentives are available under the Investment Code as administered under the Income Tax Act 1997, by Uganda Revenue Authority for export oriented investment projects. - Contact Uganda Revenue Authority

Source: Uganda Export Promotions Council

3.14.4 Institutional Structures

- Ministry of Trade, Industry & Cooperatives (MTIC)
- Uganda National Bureau of Standards (UNBS)
- Uganda Industrial Research Institute (UIRI)
- Management Training and Advisory Centre
- Uganda Integrated Programme of UNIDO
- Uganda Cleaner Production Centre (UCPC)
- Uganda Commodity Exchange (UCE)
- Uganda National Chamber of Commerce and Industry
- Kampala City Traders Association (Kacita)
- Uganda National Bureau of Standards (UNBS)
- Faculty of Food Science and Technology, Makerere University
- Uganda Export Promotion Board

3.14.5 Demand Drivers And Resource Base Factors

- Good market based macroeconomic policies.
- Improving infrastructure and energy supply.
- Uganda's economy continues to enjoy sustained economic growth at rates averaging 7% plus over the last 10 years. That has fuelled demand for manufactured goods, and imports of raw materials.
- Growing population that has increased the size of the local market fuelling demand for wholesale and retail related trade.
- Increased manufacturing has resulted in opportunity to export manufactured products to regional markets.
- Free trade and reduced of tariff and non tariff barriers.
- Regional integration and free movement of goods and services bringing together a population of over 135 million people as a market.

3.14.6 Key Trends

Overall, imports have been increasing faster than exports resulting into a wider trade imbalance. Uganda pursues a strategy of value addition to her agricultural products. With regional harmonization, Ugandan products can access regional markets without facing stiff tariffs. The country has also secured market access for a number of her products through bilateral trade preference schemes and double trade treaties.

Sector Specific License Requirements

(Refer to Appendix 3)

3.14.7 Investment and Business Opportunities

There exist investment trade and business opportunities in:

- Value addition (Agro-processing)
- Import-substitution manufacturing
- Contract manufacturing targeted at export markets
- Retail chains targeting niche markets include supermarkets and consumer goods; building materials.
- Show rooms
- Distribution Centres
- Warehousing
- Transport and logistics
- Packaging
- Bulk-breaking and assembly
- Clearing and forwarding services
- Support professional services; marketing, branding, marketing, distribution and insurance.
- Trade with neighbouring countries to take advantage of free trade opportunities in the East African Community and COMESA.
- E-commerce to target customers within Uganda and across the world

3.14.8 Useful Web links and Contacts

Uganda Integrated Programme of UNIDO
Head office of UNIDO Operation in Uganda
Plot 11 Yusuf Lule Road Nakasero.
P.O.BOX 7184, Kampala, Uganda
Mobile 256-759-711-711
Tel: 256-312-338-100
Web site: www.unido.org

Management Training and Advisory Centre.
Plot M175, 4.5km, Jinja Road, Nakawa Head office.
P.O.BOX 4655, Kampala, Uganda.
Tel: 256-221011/213
Fax: 256-41-223-853
Email info@mtac.ac.ug
Web site: www.mtac.ac.ug

Minister of Trade, Industry and Cooperatives
Plot 618, Parliamentary Avenue
P.O.BOX 7103, Kampala
Tel: +256-414 314 268/0414 314
Fax: +256-414-341247
<http://www.mtic.go.ug/>

Uganda Cleaner Production Centre
Plot 42A Mukabya Road
P.O.BOX 34644, Kampala, Uganda.
Tel: 256-41-287938/958
Fax: 256-41-287940/286767
Email: ucpc@ucpc.co.ug
Web site: <http://www.ucpc.co.ug>

Uganda National Chamber of commerce & Industry (UNCCI), Plot 1A, Kiira Road. Mulago Kampala, Uganda
Tel: +256(0)75350, 3035
Fax: +256 (0)414230310/ 312266324
email: info@chamberuganda.com
URL. <http://www.chamberuganda.com>

Uganda National Bureau of Standards
Plot M217 Nakawa Industrial Area
P.O. Box 6329 Kampala
Tel.: +256-414-505995, +256-414-222369
0800133133 Toll Free 0800133133
Fax: +256-414-286123
Email: info@unbs.go.ug

Uganda Commodity Exchange Ltd.
Plot 4 Jinja Road,
Social Security House,1st Floor, Northern Wing,
P. O. Box 35998, Kampala, Uganda.
Tel: +256 31 262922; Fax: +256 31 2262951
E-mail: uce@uce.co.ug This e-mail address is being
protected from spambots. You need JavaScript
enabled to view it
Website: www.uce.co.ug

Uganda Industrial Research Institute (UIRI)
Plot 424 Mukabya Road
P.O.BOX 7086 Kampala
Nakawa Industrial Area
Tel:256-414-286245
Fax:256-41-286695
Email: info@mtac.ac.ug
<http://www.uiri.org>

Uganda Export Promotion Board (UEPB)
5th Floor Conrad Plaza Plot 22 Entebbe Road
P.O.BOX 5045, Kampala, Uganda.
Tel: 256-414-230250/230233
Fax: 256-414-259779
Email:uepc@starcom.co.ug
<http://www.ugandaexportsonline.com>

Kampala City Trader's Association (KACITA)
16B Market Street Nakasero, Opp. Platinum House
Ro Kampala, Uganda
Tel: 031-3200401, 031-2200400

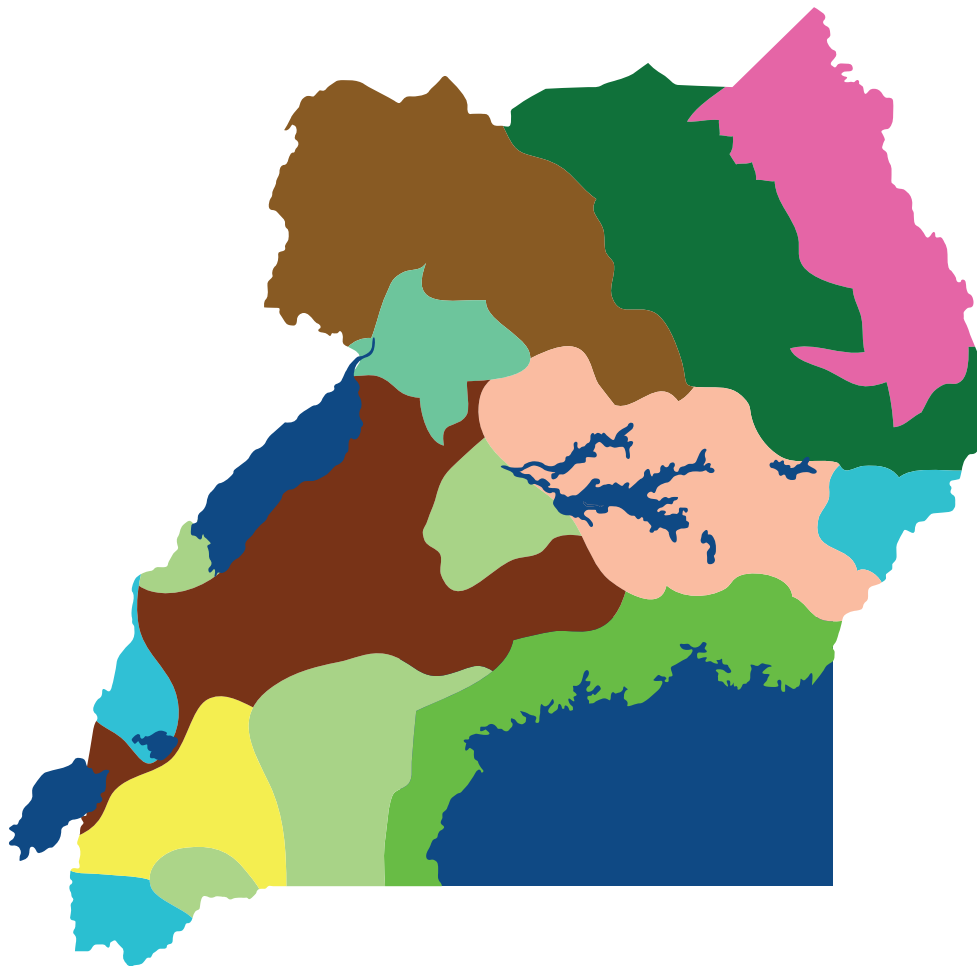
Credit: Photo/Newvision



4.0 REGIONAL PROFILES

4.1 Agricultural Production Zones in Uganda

Map of Agricultural Production Zones



Legend

- | | |
|-----------------------------------|-----------------------------------|
| Highland Ranges | North Western Savannah Grasslands |
| Kyoga Plains | ParaSavannah |
| Lake Victoria Crescent | Pastoral Rangelands |
| North Eastern Drylands | South Western Farmlands |
| North Eastern Savannah Grasslands | Western Savannah Grasslands |

4.2 Description Of The Agricultural Production Zones And Selected Enterprises

| Zone | Districts | Climate | Other characteristics | Enterprises |
|------|--|--|---|---|
| 1 | <ol style="list-style-type: none"> 1. Moroto 2. Northern Kotido 3. Eastern Kitgum | <ul style="list-style-type: none"> • Average rainfall of 745 mm with high variability, from about 600 mm over the north and north-eastern parts to about 1000 mm over the southern and western parts. • One rainy season of about 5½ months, from • April to early September with the main peak in July/August and a secondary peak in May. One long dry season of about 6 months from October to March. Most dry months from December to February. • Evaporation exceeds rainfall by a factor of over 10 during the driest months, December to February. During the rainy season evaporation is slightly more than rainfall. • Temperature ranges 12.5 – 32.5 °C • Altitude ranges from 351 – 1,524 m ASL | <ul style="list-style-type: none"> • Generally flat with isolated hills • Abundance of land still abundant in this zone • Shifting cultivation is practiced • Soils are moderate to poor • There is largely subsistence farming and • pastoral activities • There are no natural open water bodies • Area is semi arid • Poor underdeveloped infrastructure • Ongoing programmes include NUSAF, KDA and WFP • Civil strife and cattle rustling | <ol style="list-style-type: none"> 1. Gum Arabica 2. Sesame seed 3. Apiculture 4. Goats/Skins 5. Beef cattle/Hides 6. Ostriches 7. Sunflower |

| Zone | Districts | Climate | Other characteristics | Enterprises |
|------|--|--|---|--|
| 2 | <ol style="list-style-type: none"> 1. Pader 2. Kitgum 3. Eastern Lira 4. Katakwi 5. Northern Sironko 6. Northern Kapchorwa 7. Nakapiripirit 8. Southern Kotido | <ul style="list-style-type: none"> • Average rainfall of 1197 mm with moderate variability, from about 1000 mm over the north and north-eastern parts to about 1300 mm over western and southern parts • One rainy season of about 7 months, from April to late October with the main peak in July/August and a secondary peak in May. • One long dry season of about 4 months from mid-November to late March. Driest months are from December to February. • Evaporation exceeds rainfall by a factor of over 10 during the driest months, December to February. • During the rainy months, May; July and August rainfall is slightly more than evaporation • Temperature ranges from 15 - 32.5 °C • Altitude ranges from 975 - 1,524 m ASL | <ul style="list-style-type: none"> • Generally flat with isolated hills • Land is available but mainly in communal ownership • Shifting cultivation is practiced • Soils are moderate to poor • Wide wetlands with potential for irrigation • Farming is mainly communal and • predominantly subsistence with emerging • commercial farms • There is communal labour for cultivation • There is moderate to high literacy • Moderate infrastructure development • Area suffers from low incidental strife • Programmes include NUSAF, Olweny Rice Scheme, and VODP | <ol style="list-style-type: none"> 1. Apiculture 2. Beef cattle/ Hides 3. Goats/Skins 4. Sesame Seeds 5. Cassava 6. Pulses 7. Sunflower |

| Zone | Districts | Climate | Other characteristics | Enterprises |
|------|---|--|---|---|
| 4 | <ol style="list-style-type: none"> 1. Eastern Nebbi 2. South-Western Gulu 3. Western Masindi | <ul style="list-style-type: none"> • Average rainfall of 1259 mm with high variability, from about 800 within the Lake Albert basin to about 1500 mm over the western parts • Mainly one rainy season of about 8 months, from late March to late November with the main peak from August to October and a secondary peak in April/ May. • One long dry season of about 3½ months, from December to about mid March. • Driest months December to February. Evaporation exceeds rainfall by a factor of about 6 during the • Driest months from December to March. • During the rainy season, July to October, evaporation exceeds rainfall. • Temperature ranges from 17.5 – 32.5 °C • Altitude ranges from 351 – 1,341 m ABL | <ul style="list-style-type: none"> • Largely parkland with potential for livestock ranching. • Generally flat with undulating hills • Good to moderate soils • Moderate literacy levels • Largely peaceful but with influx of refugees • Infrastructure is moderate to poor • There is a possibility of block farming on a large scale in the short term due to the IDPs • Land available in this zone and hence there is high potential for increased production • Have advantage of cross border trade with DR Congo • On-going programmes are NUSAF. • Northwest Smallholder Agric project, UWA Programme | <ol style="list-style-type: none"> 1. Spices 2. Fisheries 3. Cassava 4. Apiculture 5. Beef cattle/Hides 6. Goats/Skins 7. Cotton |

| Zone | Districts | Climate | Other characteristics | Enterprises |
|------|--|--|---|--|
| 5 | 1. Kayunga 2. Kamuli 3. Iganga 4. Northern Bugiri 5. Tororo 6. Northern Busia 7. Southern Mbale 8. Pallisa 9. KumiSoroti 10. Kaberamaido 11.1 Southern Lira 12. Southern Apac | <ul style="list-style-type: none"> • Average rainfall range of 1215 mm -1328 mm • Two rainy seasons in the southern part with the main season from March to May with peak in April and secondary season from August to November with a peak in October/November. • Main dry season December to February, secondary dry season is June and July. • Evaporation exceeds rainfall by a factor of about 3 during the dry months of December to February. • During the main rainy season rainfall is greater and or about equal to evaporation. • Virtually one rainy season in the northern part from March to November, with the main peak in April/May and a secondary peak in August/September. • One dry season December to about mid March. • Evaporation exceeds rainfall by a factor of about 8 during the dry months December to February. • During the main rainy season rainfall is greater and or about equal to evaporation • Temperature ranges from 15 – 32.5 °C • Altitude ranges from 914 – 1,800 m ASL | <ul style="list-style-type: none"> • Land flat and swampy • Soils are poor to moderate • Small-scale subsistence mainly annual crops with some pastoralist • Some commercial farms • Moderate to low literacy levels • Fairly well endowed with resources • Stable geo-politically • Land is available for commercial • farming • Ongoing programmes include • NAADS and many others | 1. Fisheries 2. Apiculture 3. Maize 4. Pulses 5. Beef cattle 6. Cassava 7. Goats |

| Zone | Districts | Climate | Other characteristics | Enterprises |
|------|---|--|--|---|
| 6 | <ol style="list-style-type: none"> 1. Kampala 2. Mukono 3. Wakiso 4. Eastern Mpigi 5. Eastern Masaka 6. Eastern Rakai 7. Kalangala 8. Jinja 9. Mayuge 10. Southern Bugiri 11. Southern Busia | <ul style="list-style-type: none"> • Average rainfall of 1,200 to 1,450 mm • Two rainy seasons in the eastern part of the zone with the main season from March to May with peak in April and secondary season from August to November with a modest peak in October/November. • Main dry season December to February, secondary dry season is June to September. • Evaporation exceeds rainfall by a factor of about 2 during the dry months, December to February. • During the peak of the rainy seasons rainfall is greater and or equal to evaporation • Two rainy seasons in the western part of the zone with the main season March to May with peak in April and secondary season October to December with a peak in November. • Main dry season for June to September, secondary dry season is January and February. • Evaporation exceeds rainfall by a factor of about 3 during the dry months, June to August. • During the main rainy season rainfall is greater and or equal to evaporation. • Temperature ranges from 15 – 30 °C • Altitude ranges from 1,000 – 1,800 m ABL | <ul style="list-style-type: none"> • Hilly and flat with wetland and forested areas • Soils are good to moderate • Small medium and large-scale intensive farming with potential for commercial production • Infrastructure generally good. • Prospects for processing zones and warehousing • Entrepreneurship skills are fairly well developed. • Skilled labour is readily available • Service providers available • Attitudes positive and open to new • technology • Literacy levels fairly high • Generally well endowed with resources • Stable and mostly cosmopolitan with high • potential for urban farming • Land is generally available through sale • Lots of private investment opportunities • High potential for irrigation • Higher migrant labour available • Water for industry available • Most ongoing programmes are present here | <ol style="list-style-type: none"> 1. Robusta coffee 2. Fisheries 3. Spices 4. Floriculture 5. Horticulture⁷ 6. Vanilla 7. Cocoa 8. Dairy cattle |

| Zone | Districts | Climate | Other characteristics | Enterprises |
|------|--|--|---|--|
| 7 | <ol style="list-style-type: none"> 1. Hoima 2. Kiboga 3. Southern Luwero 4. Mubende 5. Kibaale 6. Kyenjojo 7. Kabarole 8. Kamwenge 9. Southern Kasese | <ul style="list-style-type: none"> • Average rainfall of 1,270 mm with high variability, from about 800 over eastern L. Albert parts to about 1400mm over the western parts. • Two rainy seasons, main season from August to November with peak in October and secondary season March to May with peak in April. • Main, dry season from December to about mid March secondary dry season is June to July. • Evaporation exceeds rainfall by a factor of up to 5 during the dry months. During the rainy months, rainfall is greater or equal to evaporation. • Temperature range from 15 – 30 °C • Altitude ranges from 621 – 1,585 m ASL | <ul style="list-style-type: none"> • Soils are generally good to moderate • Land available for agriculture and under utilized • Small to large scale farming but majority are smallholder • Out-grower systems existing • Infrastructure moderately developed • Land ownership disputes in some parts • Ongoing programmes include NAADS, DDSP, Fisheries • Development Project | <ol style="list-style-type: none"> 1. Robusta coffee 2. Tea 3. Apiculture 4. Maize 5. Bananas (Brewing) 6. Beans 7. Beef cattle/Hides |

| Zone | Districts | Climate | Other characteristics | Enterprises |
|------|--|--|--|---|
| 8 | <ol style="list-style-type: none"> 1. Eastern Masindi 2. Nakasongola 3. Northern Luwero 4. Central Kiboga 5. Southern Mubende 6. Western Mpigi 7. Western Masaka 8. Western Rakai 9. Sembabule 10. Eastern Mbarara 11. Southern Ntungamo 12. Northern Bundibugyo | <ul style="list-style-type: none"> • Average rainfall range of 915 to 1021 mm • Two rainy seasons, main season from March to May with peak in April and secondary season in September to December with a modest peak in November. • Main dry season June to August, secondary dry season is January to February. • Evaporation exceeds rainfall by a factor of about 6 during the dry months in June to August. During the main rainy months, April and May rainfall equals evaporation • Temperature ranges from 12.5 – 30°C • Altitude ranges from 129 – 1,524 m ASL | <ul style="list-style-type: none"> • Rolling hills with some flat areas • Soils are moderate to poor • Mainly small holders with a lot of communal grazing • Agro pastoral practices • Low literacy level • Absentee landlords with squatter population • Infrastructure and marketing systems are poor to moderate • National Livestock Productivity Improvement Project (NLPIP) is an on-going programme | <ol style="list-style-type: none"> 1. Beef cattle 2. Dairy cattle 3. Goats 4. Spices (Bird's eye chillies) 5. Apiculture 6. Citrus 7. Pineapples |

| Zone | Districts | Climate | Other characteristics | Enterprises |
|------|--|--|---|--|
| 9 | <ol style="list-style-type: none"> 1. Western Mbarara 2. Bushenyi 3. Northern Ntungamo 4. Rukungiri 5. Northern Kanungu | <ul style="list-style-type: none"> • Average rainfall range of 1,120 – 1,223 mm • High variability, lowest about 800 mm Kasese Rift Valley, highest over slopes of Rwenzori mountains, over 1500mm • Two rainy seasons, main season from August to November with peak in September to November and secondary season in March to May with peak in April. • For Mubende and Luwero the main season is March to May with a peak in April and the Secondary season from October to December with a peak in November. • Evaporation exceeds rainfall by a factor of about 5 during the dry months from December to March. • During the rainy months of March, and August to • November rainfall exceeds evaporation. • Main dry season is from December to late March, secondary dry season is June to August. • Temperature ranges from 12.5 – 30°C • Altitude ranges from 129 – 1,524 m ASL | <ul style="list-style-type: none"> • Shortage of land and land • fragmentation in some parts of the • zone • Largely small to medium scale • intensive farming • Potential for block farming e.g. in • Kasese • Moderate literacy rate • Relatively well organized and • moderately endowed • Infrastructure and marketing systems • are fairly well developed • Farmers’ entrepreneurial skills are well • developed • Attitudes towards farming are good • Ongoing programmes include NAADS, • Area-based Agricultural Programme, • IFAD, FDP | <ol style="list-style-type: none"> 1. Robusta coffee 2. Tea 3. Dairy /Hides 4. Fisheries 5. Bananas (Dessert) 6. Vanilla 7. Tobacco |

| Zone | Districts | Climate | Other characteristics | Enterprises |
|------|--|---|--|---|
| 10 | <ol style="list-style-type: none"> 1. Northern Mbale 2. Southern Sironko 3. Southern Kapchorwa 4. Southern Kanungu 5. Kabale 6. Kisoro 7. Northern Kasese 8. Southern Bundibugyo | <ul style="list-style-type: none"> • Rainfall usually more than 1400 mm • Two main rainy seasons from September to December for the Kabale, Kisoro and Kasese region • One long rainy season from March to October with peak in April and Secondary peak in August for Northern Mbale, Southern Sironko, Southern Kapchorwa • Temperature ranges from 7.5 – 27.5 °C • Altitude ranges from 1,299 – 3,962 m ASL | <ul style="list-style-type: none"> • Soils are mostly young volcanic and are rich in nutrients • Mountainous high altitude areas • Cultivated land is highly fragmented • with small plots covering terraced hillsides • Infrastructure is poor largely due to the terrain • Entrepreneurial skills fairly developed • Stable geo-politically • Ongoing programmes include NAADS, Agro Forestry, African Highlands initiatives, AFRICARE, IUCN, CARE | <ol style="list-style-type: none"> 1. Arabica Coffee 2. Passion fruit 3. Vanilla 4. Dairy / Hides 5. Spices (Cardamom, White/Black pepper,) 6. Maize 7. Irish potatoes |

Source: Ministry of Agriculture Animal Industry & Fisheries

4.3 Tourism Regional Profiles

National Parks



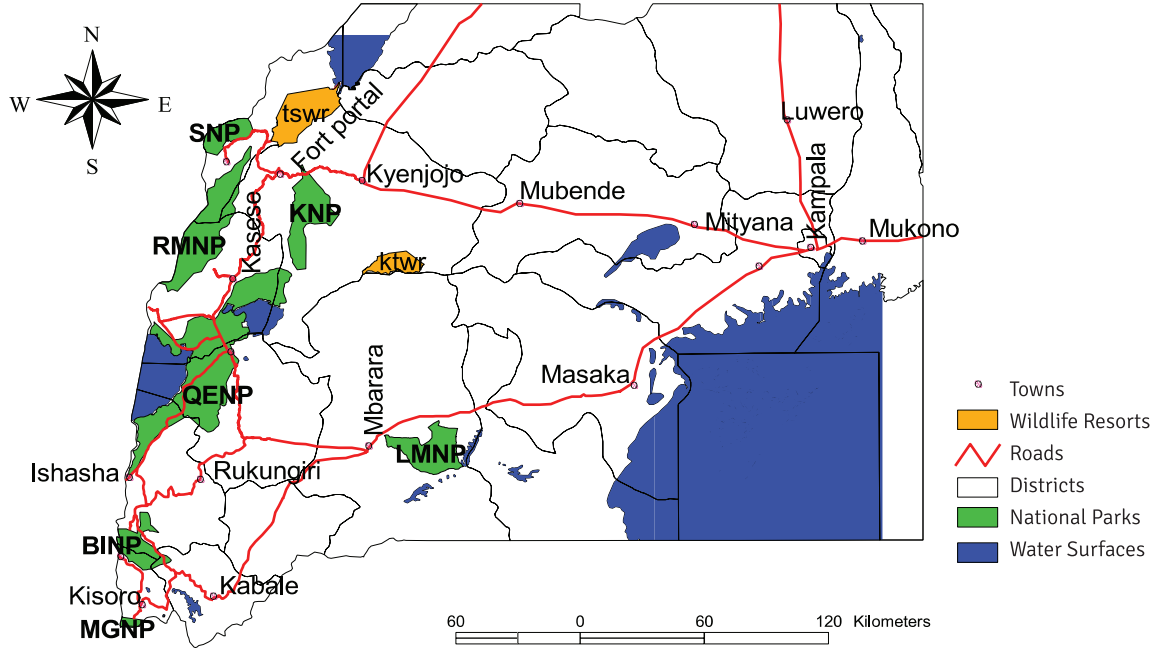
Source: Uganda Investment Authority

Uganda Wildlife Authority Protected Areas



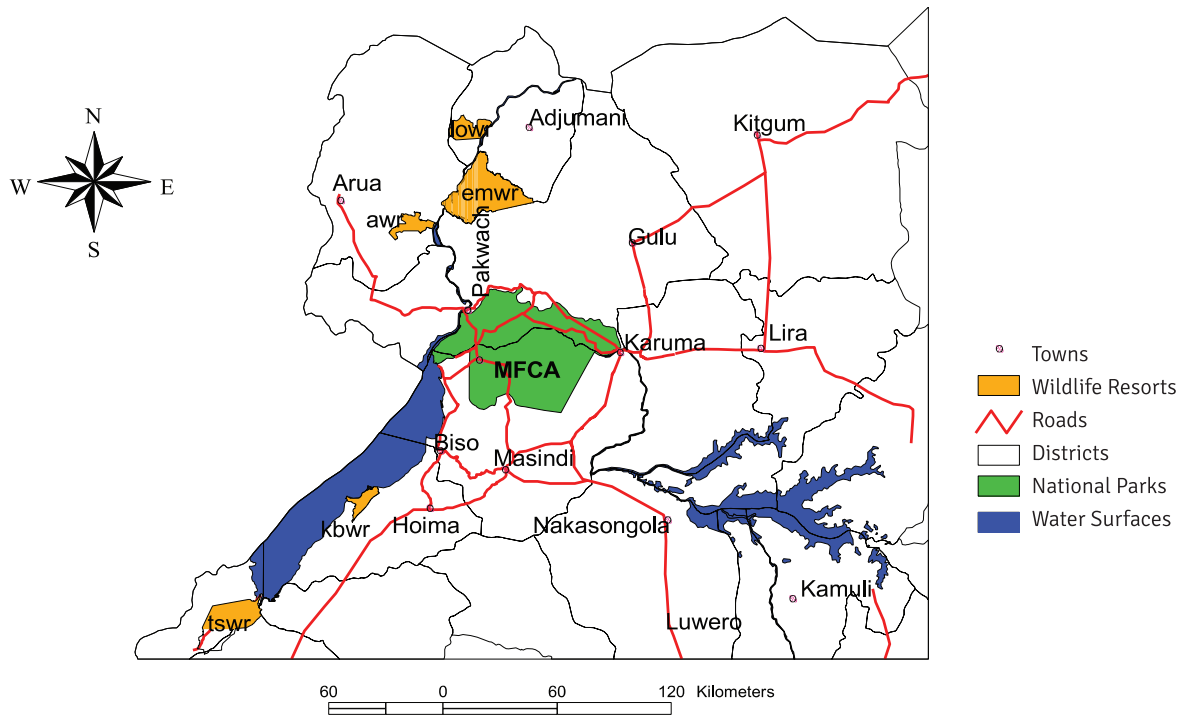
Source: UIA

National Parks and Wildlife Reserves in Central and Western Uganda



Source: Uganda Investment Authority

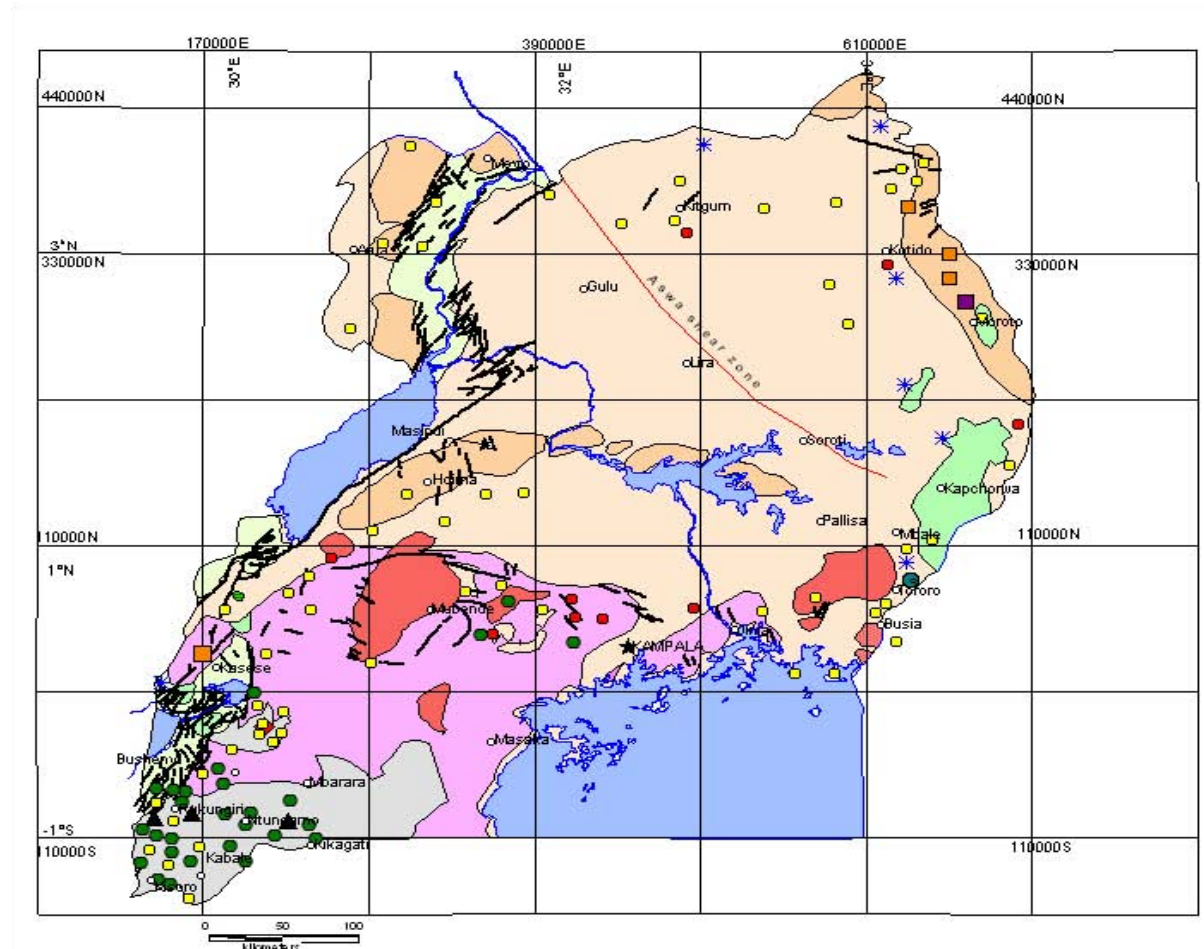
National Parks and Wildlife Reserves in Northern Uganda



Source: Uganda Investment Authority

4.4 Geological Profiles

General Geology and Mineral occurrence Map of Uganda

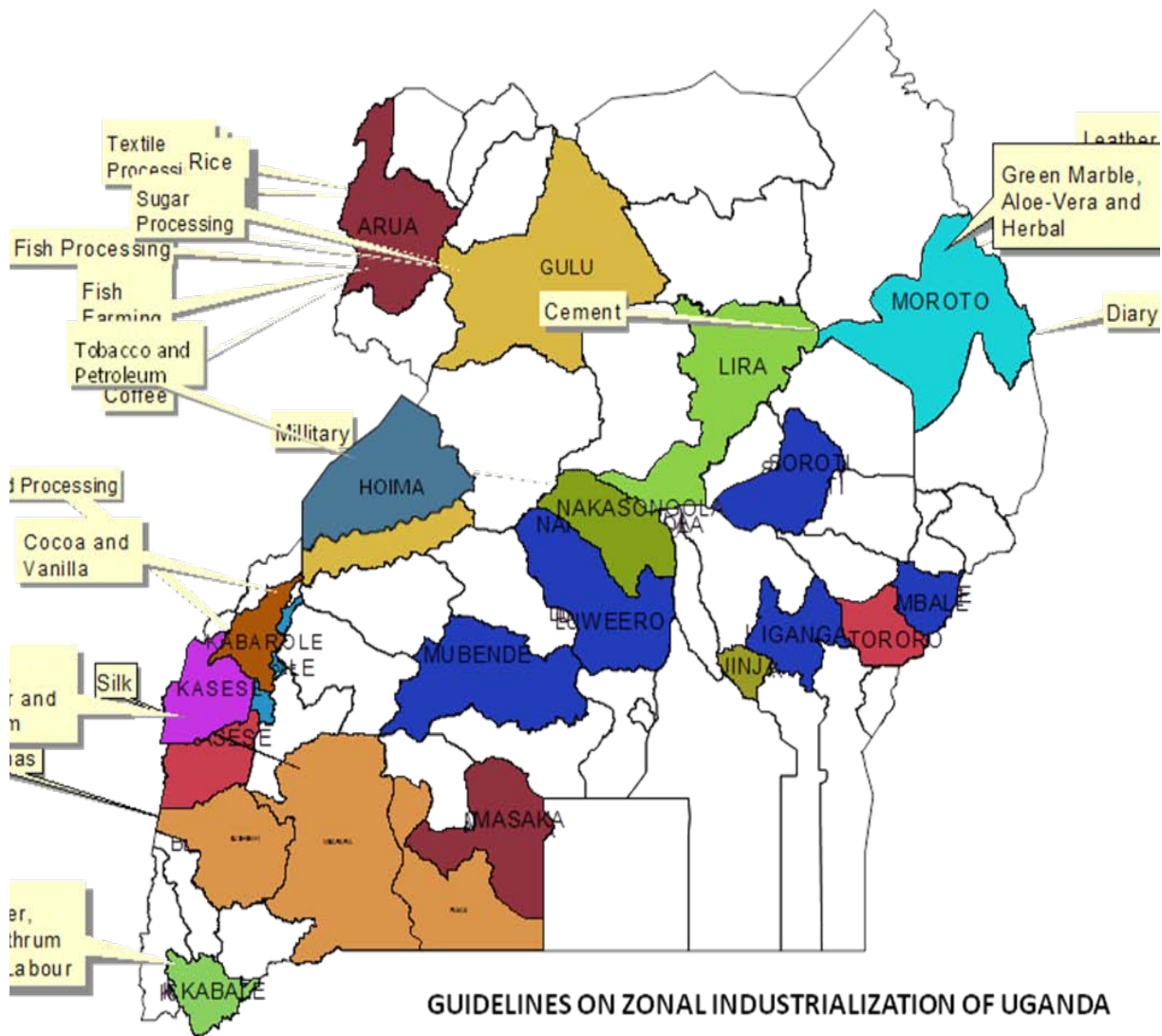


| LEGEND | | | |
|-----------------|---|--|-------------------------|
| GEOLOGY | | | |
| | Pleistocene to recent sediments | | |
| | Recent to Tertiary sediments | | |
| | Proterozoic | | |
| | Folded Proterozoic | | |
| | Proterozoic metamorphosed Sediments | | |
| | Archean (?) basement Granulite and gneiss | | |
| | Intrusive granite | | |
| | Faults | | |
| MINERALS | | | |
| | Gold | | Chromite |
| | Copper, Cobalt | | Pegmatites |
| | Tin, Tungsten | | Phosphates, Rare earths |
| | Columbite-tantalite, Beryl | | Diamonds |
| | Carbonatites | | |

Source: Uganda Investment Authority

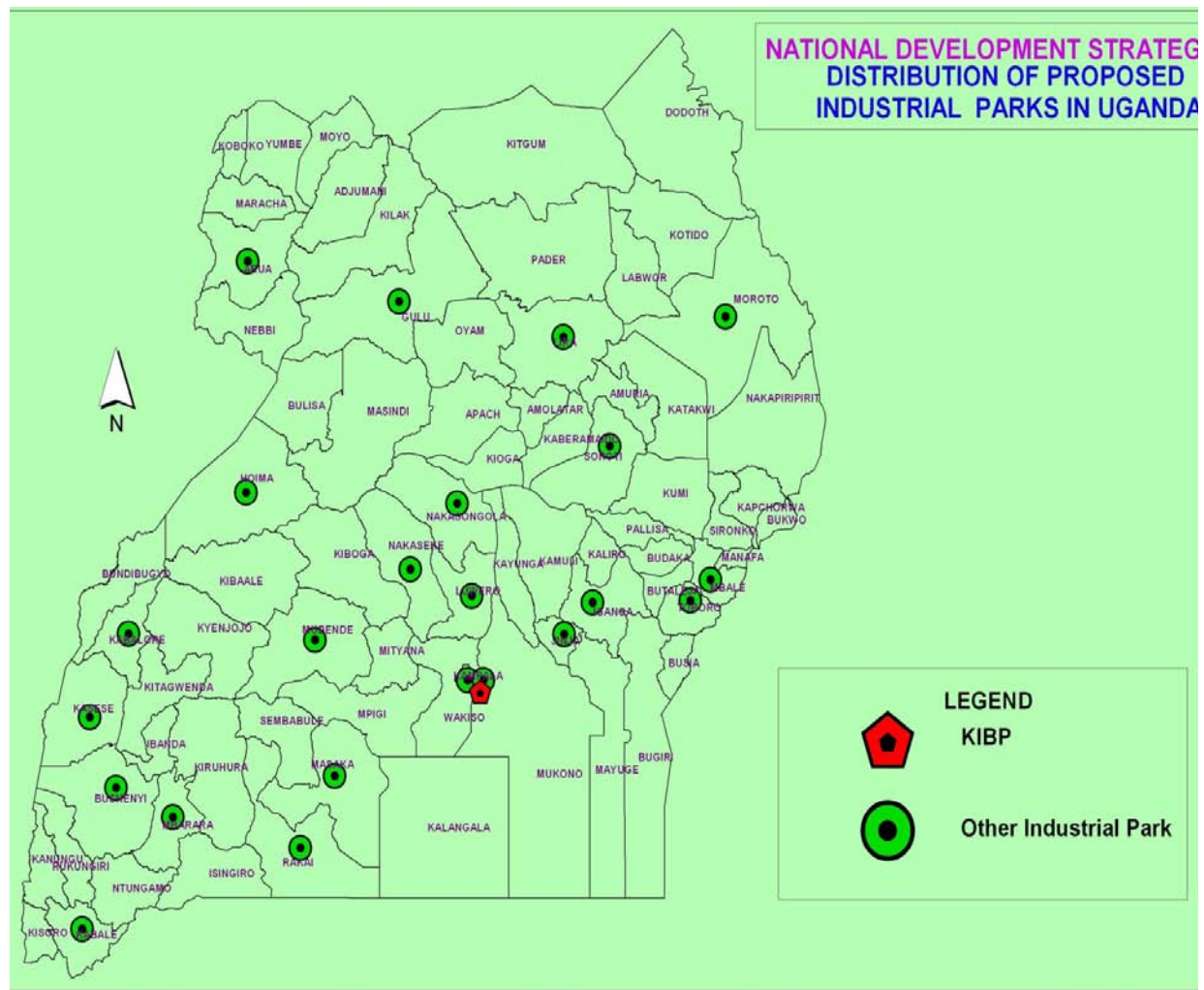
4.5 Industrialisation Zones of Uganda

Guidelines on Zonal Industrialization



Source: UIA

Distribution of Proposed Industrial Parks in Uganda



Source: Uganda Investment Authority

Appendices

Appendix 1:

Contacts for Uganda's Ministry of Foreign Affairs and Diplomatic Missions Abroad

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Ugandan Consulate in Lusaka, Zambia
P.O. Box 33557 Lusaka, Zambia

+260-1 226078
+260-1227 916/8212462

Appendix 2:

Contacts for Banks, Lawyers, Insurance and Freight Forwarders

Banks

Standard Chartered Bank Uganda Ltd
Plot 5 Speke Road
Kampala Uganda
P.O.Box 7111

+256-414 342 875
+256 414 258211

Email: scb@ug.standardchartered.com
Website: www.standardchartered.com

ABC Capital Bank (U) Limited
Colline House, Kampala
P.O. Box 21091
Plot 4 Pilkington Road

+256 414 345 200
+256 414 258 310

e-mail: abc@abccapitalbank.com

Bank of Africa – Uganda Limited
P.O Box 2750
Plot 45, Jinja Road
Kampala

+256-414 230 439
+256-414 302 001

E-mail: boa@boa-uganda.com
Website: www.boa-uganda.com

Barclays Bank of
Uganda Limited
P.O Box 2971
Kampala
Barclays House
Plot 4 Hannington Road

+256-141 231 839
+ 256-312 218 300/317

E-mail: Barclays.Uganda@barclays.com

Cairo International
Bank Ltd
P.O Box 7052
Kampala
Plot 30 Kampala Road

+256-414 230 141
+256-414 230 137

E-mail: cibug@infocom.co.ug

Bank of Baroda (U)Limited
P.O Box 7197Kampala
Plot 18, Kampala Road

+256-414 232 783
+256-414 230 781

Website: www.bankofbaroda.com

Centenary Rural Development Bank Limited
P.O Box 1892 Kampala
Plot 7 Entebbe Road

+256 414 251 273
+256-414 232 393

Website: www.centenarybank.com

Citibank Uganda Limited
P.O Box 7505 Kampala
Plot 4 Ternan Avenue
Centre Court

+256-414 340 624
+256-414 305 500

Website: www.citigroup.com

Crane Bank Limited
P.O Box 22572 Kampala
Plot 38 Kampala Road
Crane Chambers

+256-414 231 578
+256-414 341 414/+256-414 345

cranebank@cranebanklimited.com

Diamond Trust Bank Uganda Limited
Plot 17/19 Kampala Rd

Diamond Trust Building,
P.O Box 7155 Kampala

+256-414 342 286
+256-414 259 331/2/3

e-mail: dtbu@spacentuganda.com

Ecobank Uganda limited
P.O Box 7155 Kampala
Plot 4 Parliament Building

+256-312 266 079
+256-312 266 078/+256-414 231 840

Website:www.ecobank.com
e-mail: ecobankug@ecobank.com

Equity Bank Uganda Limited
P.O.Box 10184 Kampala
Plot 390 Muteesa 1Katwe Road

+256-312 262 437
+256-414 531 377

Website: www.equitybank.co.ug

Fina Bank Uganda Ltd.
P.O. Box 7323 Kampala
Plot 7 Buganda Road

+256-414-233-838256-414-237-305

E-mail:banking@finabank.com

Housing Finance Bank
Limited. P.O Box 1539 Kampala
Plot 25 Kampala Road

+256-414 341 429
+256-414 259 651/2

e-mail: hfcu@housingfinance.co.ug

KCB Bank Uganda,
Limited. P.O. Box 7399 Kampala

+256-414 345 751
+256-417 118 200

Website: www.kcbbankgroup.com

National Bank of Commerce (U) Ltd
P.O Box 23232 Kampala
Plot 13A Parliament
Avenue Cargen House

+256-414-347-700/2/3/4

e-mail: nbc@africaonline.co.ug
e-mail: nbc-kble@utlonline.co.ug

Orient Bank Limited
Orient Plaza Plot 6/6A,
Kampala Rd
P.O Box 3072, Kampala

+256-414-348 039
+256-414-236-012/3/4/5

Website: www.orient-bank.com
e-mail: mail@orient-bank.com

Stanbic Bank Uganda Limited Crested Towers,
Short Tower, Plot 17 Hannington Road
P.O Box 7131 Kampala

+256-414 231 116/256-414 230 068
+256-312 224 111/256-312 224 600

Website: www.stanbic.com

Tropical Bank Limited
Plot 27 Kampala Road
P.O Box 9485
Kampala

+256-312 264 494/256-312 261 962
+256-414 313 100

e-mail: admin@trobank.com

Website: www.trobank.com

United Bank for Africa (Uganda) Limited
Spear House 2nd floor
Plot 22 Jinja Road
P.O. Box 7396 Kampala

+256-417 715 122/+256-417 715 100

Website: www.ubagroup.com

Bank of India (Uganda) Ltd Plot 37, Jinja Road,
Kampala,
P.O. Box 7332, Kampala

+256 (0)414 341 880

+256 (0)313 400,

Email: BOI.Uganda@bankofindia.co.in

Website: <http://www.bankofindia.co.in>

Lawyers

Uganda Law Society
Plot 5A Acacia Avenue
P.O. Box 426 Kampala, Uganda

+256 414 342431

+256 414 342424

E-mail: uls@uls.or.ug

Insurance

Uganda Insurers Association
Insurers House Plot 24A,
Acacia Avenue, Kololo,
P.O. Box 8912 Kampala Uganda

+256 414 500944

+256 414 230469/+256 414 500945/6

Freight Forwarders

Uganda Freight Forwarders Association
Secretariat
P.O. Box 28904, Kampala Uganda, Postal Building
1st Floor, Suite 6B
Plot 65/75 Yusuf Lule Road

+Fax: 256 414 231696 +256 41 234958,

+256 772 589433,

E-mail: info@ugandafreightforwarders.net

uffasecretary@yahoo.co.uk

agnes@ugandafreightforwarders.net

Appendix 3: Sector Licensing Requirements

| SECTOR | ISSUING AUTHORITY | LICENSE |
|-------------|---------------------------------|--|
| Agriculture | Cotton Development Organisation | Export Registration Certificate registration for dealing in seed cotton registration for dealing in cotton seed registration for dealing in lint cotton registration for exporting lint registration for operating a ginnery |
| | Diary Development Authority | License for Freezer operators Importers and exporters of dairy equipments Importers and exporters of milk and milk products Importers and exporters of starter culture and stabilisers Large processor of milk and milk products Milk Transporter License for Cooler operators Registration certificate for a company controlling a store used or intended to be used for storage of milk and milk products Small scale processors |
| | Department of Fisheries | Fish processing control Fees (license) for fish processing factories Fishing control permit - citizen Fishing vessel license - large water bodies Fishing vessel license - small water bodies Fishing vessel license - swamps, rivers & dams Fishing vessel license for non citizen License for containerized vessels carrying fish (5 - 10 tones) License for containerized vessels carrying fish (over 10 tones) License for containerized vessels carrying fish (under 5 tones) License for Trucks carrying fish (5 -10 tones) License for Trucks carrying fish (5 tonnes) License for Trucks carrying fish (over 10 tonnes) License to engage in artisanal processing of fish or for fish mongers License to engage in large scale artisanal fish processing of fish MAWS License to fishnet manufacturing factories/ importer |
| | | Authorization for the importation of fish and fish products Fish seed production certificate Fish breeding permit Certificate for importation of live fish into Uganda Fish transfer permit Certificate for aquaculture inputs(fish seed,fertilizers,hormones and antibiotics) Risk assessment/approval of products and technology Registration of beach management unit(BMU) License for fisher or dealer in fish Fish sanitary certificate Approval of authorized land site Approval of independent ice suppliers to fish industry License for the manufacture, sale and importation of fishing appliances Permit for recreational fishing |

| SECTOR | ISSUING AUTHORITY | LICENSE |
|----------|---|--|
| | Department of Livestock and Entomology | Buyer's licence-Hides & Skin Export-buyer's licence-Hides and Skins Movement Permit-Hides & Skins Permit to export in any manner or place Veterinary Health Certificate |
| | Ministry of Agriculture, Animal Industry and Fisheries (MAAIF) Livestock commissioners | Cattle export license Cattle Traders permit |
| | Ministry of Agriculture, Animal Industry and Fisheries (MAAIF) | Registration of agricultural chemicals Registration of fumigator of agricultural chemical or commercial applicator Tobacco buying license Registration of premises Sugar export license Registration of tobacco activity Declaration of tobacco growing area Authorization for distribution of tobacco seed Registration of tobacco grower |
| | Uganda Coffee Development Authority | Export License International Coffee Organisation (ICO) Certificate Quality Certificate Processor License (1 huller) Processor License (2 hullers) Processor License (3 hullers) Processor License (4 hullers) |
| | National Animal Genetic Resources Centre and Data Bank | Registration of animal genetic resources and related activities License to import or export animal breeds |
| Forestry | National Forestry Authority | License to use or work in a central forest reserve (CFR) Tree farming license in central forest reserve (CFR) |
| Taxation | Uganda Revenue Authority | Returns to regional commissioner of customs and excise |

| SECTOR | ISSUING AUTHORITY | LICENSE |
|---------------------------|---|---|
| Education and Skills | National Council for Higher Education | Charter-University Permit for the letter of interim authority Provisional License-Tertiary Provisional License-University Grant of charter and accreditation Permit to establish constituent colleges and affiliation to a private university Grant of certificate of classification and registration. Accreditation of institutions and their academic and professional programmes. Change of name of institution |
| Energy, Mining, Oil & Gas | Atomic Energy Council | Authorisation to sell, transfer, loan or lease radiation source Certificate of Compliance or Acceptance for a building Certificate of Compliance or Acceptance of a new modified radiation device or radiation premises Import/ export permits License authorizing administration of ionizing radiation to persons License authorizing an engineer or technician to install, service or maintain irradiation device or radioactive material License to dispose of radioactive materials License to import/export radioactive materials or device License to possess or use radioactive materials or devices License to sell, loan or deal with radioactive material or radiation devices Permit to modify radiation devices, material or premises Radiation Premises License Transport Permit |
| | Department of Geological Surveys | Prospecting License Exploration License Location License Mineral Dealers License Mining Lease Environmental Impact Assessment / Environmental Audits Goldsmith's License Permit to export minerals Permit to import minerals |
| | Department of Energy | Petroleum Construction Permit Petroleum Operating License Underground Tank License |
| | Ministry of Energy & Mineral Development | Petroleum Exploration and Production license Production Sharing Agreement |
| | Petroleum Exploration and Production Department | Consent to abandon or suspend a well Consent to Drill |

| SECTOR | ISSUING AUTHORITY | LICENSE |
|--------|--|--|
| | Petroleum Supply Department | Exportation License Importation License License to store petroleum products Retail License Transportation License Wholesale License |
| Health | Allied Professionals Council | Annual practicing license License to operate a private allied health unit (City& Municipal) License to operate a private allied health unit (Town & Rural) Professional Registration Certificate |
| | National Drug Authority | Export licence Approval of drugs & drug combinations |
| | Occupational Safety & Health Department | Certificate of registration Examination report |
| | Uganda Medical & Dental Practitioner's Council | Annual practicing license Certificate of good standing Full registration certificate Health unit operating License Inspection fee for any new in patient health unit Period inspection-for registered min patient health unit up to 200 beds Registration fee for new Health Unit (I/P & O/P) Health unit operating License 3 above 500 beds) city Health unit operating License 4 above but 51-200 beds) trading centre Health unit operating License In patient health units(city) Health unit operating License (Day Care Clinic) City Health unit operating License (Day Care Clinic) Municipality Health unit operating License 3 above 500 beds) municipal Health unit operating License 3 above 500 beds) rural Health unit operating License 3 above 500 beds) trading Health unit operating License 3 above but 201-500 beds) City Health unit operating License 3 above but 201-500 beds) municipal Health unit operating License 3 above but 201-500 beds) rural Health unit operating License 3 above but 201-500beds) trading centre Health unit operating License 3 above but 51-200 beds) City Health unit operating License 3 above but 51-200 beds) rural Health unit operating License 3 above but 51-200 beds) trading centre Health unit operating License 3 above but 51-200 beds)municipal Health unit operating License 4 above 500 beds) city Health unit operating License 4 above but 201-500 beds) City Health unit operating License 4 above but 201-500 beds) municipal Health unit operating License 4 above but 201-500 beds) rural Health unit operating License 4 above but 201-500beds) trading centre |
| | Uganda Nurses and Midwives Council | Private domiciliary clinic Private nursing health unit special license-nurse's health unit |

| SECTOR | ISSUING AUTHORITY | LICENSE |
|--------------------------------------|--|---|
| ICT | | Subscription broadcasting TV- (Pilot Projects) DTT TV- Commercial Free to Air |
| | National Information Technology Authority in Uganda (NITA-U) | License for business process outsourcing (BPO) operators License for certification authorities (CA/service providers) License for E-waste management companies License for information Technology Training in Uganda License for IT service providers - Hardware & soft ware suppliers/ developers -IT hardware assembly |
| | Uganda Broadcasting Council | Broadcasting license License to install television and radio station Registration of television and radio stations Registration of video and cinematograph operators Television dealer's license Television viewer's license Theatre license |
| | Uganda Communications Commission | Approval of telecommunications systems and equipment Construction permit (station) Construction permits (telecommunication system) Designation of Public operator Domestic Courier Operator License Equipment authorization / approval of radio communication equipment frequency spectrum use International Courier Operator License National Postal Operator Postal license Public Infrastructure provider license - Public Service Provider License radio communications license Regional Courier Operator License telecommunications license |
| Social Sector | Employment /Labour Department | Licence of operation to private employment agency (category A) Licence of operation to private employment agency (category B) Local Recruitment permit within Uganda Recruitment permit |
| | Ministry of Internal Affairs | certificate of permanent residence Entry permit work permit class B work permit class C-miners work permit class D-Business & Trade work permit class E-Manufacturers work permit class F-Professionals work permit class G- |
| Professional & Consulting Businesses | Architects Registration Board | Annual Subscription fee Individual Practicing Certificate-Architects Registration Certificate-Architects Temporary registration-Architects |
| | Chief Registrar of High Court | Advocates practicing certificate Court Bailiffs license |

| SECTOR | ISSUING AUTHORITY | LICENSE |
|---------|---|---|
| | Engineers Registration Board | Engineers Registration Certificate Engineers temporary Registration Certificate |
| | Institute of Certified Public Accountants of Uganda | Annual Subscription fee Certificate of practice Enrolment to ICPA-U. License of Practice-associate accountant Registration of a certified public accountant of Uganda (CPA(U)) |
| | Nursing & Midwifery Council | Private practice license-Nurses & Midwives Registration of a Nurse or Midwife |
| | Pharmacy Board | Certificate of registration-pharmacist |
| | Surveyors Registration Board | Practicing certificate Registration Certificate Temporary registration-surveyor |
| | The Law Council | Admission & Enrolment of advocates Special practising certificate |
| | Uganda Law Society | CLE compliance certificate (identity card Uganda law society) CLE compliance certificate (subscription East African society subscription) CLE compliance certificate (subscription Uganda law society) |
| | Uganda Medical and Dental Practitioners Council | continuing Medical Education Certificate private practice license Medical officers provisional registration certificate- non-Ugandans provisional registration certificate-Ugandans temporary registration- private Sector temporary registration-public Sector |
| Tourism | Department of Industry and Technology | Certificate of Approval |
| | Department of Museums | Excavation permit |
| | Tourism, Wildlife & Heritage | Export & Import permits (Trophy, live animals, meat, plant parts and other specimen eg blood, hair, urine for endangered species) Tourist agents license Class E Wildlife use right Class F Wildlife use right Environmental Impact Assessment Hotel license Hotel Manager's License Professional hunters license Professional Trappers license Tour Facility License Tourist Development Levy Travel Agents, Tour Operators and Tour guides License |
| Trade | Industrial Licensing Board | Industrial License |
| | Bank of Uganda | Certificate of Remittance |

| SECTOR | ISSUING AUTHORITY | LICENSE |
|--------|---|---|
| | Ministry of Trade Industry and Cooperatives | External Trade Act Cap 88 Extension License Grant of exclusive license Hire purchase License Hours of sale of liquor Import License Native liquor brewing license Native liquor shop license Night Club Liquor License Off license Refined spirits license Ship & Train License Special Liquor license Spirituos liquor license Temporary disposal license-Liquor Auction Liquor license Bar license Casual brewing native liquor license Certificate of Origin Club liquor license Entertainment License Export License |
| | Registrar of Cooperative Societies | Certificate of registration |
| | Local and Urban Authorities | Liquor License under the Liquor Act Cap 93 |
| | Uganda Commodity Exchange | Commodity grader license Commodity weigher license Commodity sampler license Warehouse keeper license |
| | Uganda Cooperative Alliances Ltd | Contributory Provident Fund Approval Investment of funds approval Primary Society Registration Probationary Society Registration Registering Amendment of Byelaws Registration of Charges |
| | Uganda Export Promotion Board | levy on designated exports Membership Registration Certificate Preferential certificate of origin |
| | Uganda Investment Authority | Certificate of approval to externalize funds Certificate of Incentives Investment license Registration of agreement for the transfer of foreign technology or expertise Entry permit |
| | Uganda National Bureau of Standards | ISO Management System Certificate Permit for distinctive mark to complying commodities Quality Mark Standard Mark certificate |

| SECTOR | ISSUING AUTHORITY | LICENSE |
|-----------------------|-------------------------------------|---|
| | Uganda National Bureau of Standards | Copyright in a literary, musical or artistic work - section 7 Copyright in works of Government and international bodies - section 6 License contracts Licenses of right Non-exclusive license Patent registration Registration of a company incorporated outside Uganda Registration of a prospectus Registration of Charges Registration of resolutions Stamp duty Statement in lieu of prospectus Trademark Registration User license Utility Certificate |
| | Uganda National Bureau of Standards | Compulsory licenses Copyright by reference to country of first publication -section 5 Copyright by virtue of nationality or residence - section 4 Copyright in a broadcast - section 10 Copyright in a cinematograph film - section 8 |
| | Uganda Revenue Authority | Authorisation to export goods for outward processing Boarding Station permit Bonded Warehouse/ manufacture under bond license Certificate of Clearance Customs Agency License Grant of Transire Transit goods license-license for vehicles conveying goods under customs control Warehouse License |
| Transport & Logistics | Civil Aviation Authority | Aerodrome Certificate Aerodrome license Aerodrome construction permit |
| | Civil Aviation Authority | Approved Maintenance Organisation Permit Approved Maintenance programme Approved Training Organisation Permit Cabin crew member certificate Catering Operator Security Programme certification Certificate of Airworthiness Certificate of aircraft registration Certificate of fitness for flight Commercial pilot license Designated Airport Service Charge Examiner Certificate Designated Medical Examiner Certificate |

| SECTOR | ISSUING AUTHORITY | LICENSE |
|-----------|------------------------------|--|
| | Civil Aviation Authority | Export certificate of airworthiness Flight engineer license Flight operations officers license Flight radio telephone operator license Ground instructor license Maintenance organisation certificate Noise certificate Parachute jumping authorisation Parachute operations certificate Private Pilot License Radio telephone operator rating Regulated Agent Security Programme Certification Restricted certificate of air worthiness Rotor craft external load operator certificate Special flight permit Student pilot license |
| Transport | Uganda Railways Corporation | Port Rates |
| | National Road Safety Council | Dealer's plates and dealer's vehicle licence Driving Permit Driving school license Instructor's licence Learner driving permit Motor vehicle licence Motor Vehicle registration |

| SECTOR | ISSUING AUTHORITY | LICENSE |
|--------------------|---|---|
| | Transport Licensing Board | <p>Inland water Transport Vehicles (cars)</p> <p>Motorcycle (Boda-Boda)License</p> <p>Owner's Transport Vehicle Permit (10 tons less than 30 tons)</p> <p>Owner's Transport Vehicle Permit (2 tons Less than 5 tons)</p> <p>Owner's Transport Vehicle Permit (5 tons less than 10 tons)</p> <p>Owner's Transport Vehicle Permit (Above 30 tons)</p> <p>Owner's Transport Vehicle Permit (Less than 2 tons)</p> <p>Permission to suspend an operator's license</p> <p>Private motor Omnibus operator's license</p> <p>Public Omnibus operator's license (Public Service Vehicles-PSV) (Buses 40 Passengers and Above)</p> <p>Public Omnibus operator's license (Public Service Vehicles-PSV) (Country Taxi 5-7 passengers)</p> <p>Public Omnibus operator's license (Public Service Vehicles-PSV) (M/ Buses 20-39 Passengers)</p> <p>Public Omnibus operator's license (Public Service Vehicles-PSV) (M/ Buses 7-19 Passengers)</p> <p>Rental -Vehicle operator's license (Public Service Vehicles-PSV Rental & Tourist over 40 passengers)</p> <p>Rental -Vehicle operator's license (Public Service Vehicles-PSV) Rental & Tourist 7 passengers)</p> <p>Rental -Vehicle operator's license (Public Service Vehicles-PSV) Rental & Tourist Above 20-40 passengers)</p> <p>Rental -Vehicle operator's license (Public Service Vehicles-PSV) Rental & Tourist Above 7-20 passengers)</p> <p>Short term license</p> <p>Certificate of registration</p> <p>Declaration of eligibility</p> <p>Certificate of sea worthiness</p> <p>Registration of alteration of vessel</p> <p>Provisional certificate where vessel is reregistered</p> <p>Re-registration on change of ownership</p> <p>Certificate of Amendment</p> <p>Certificate of deregistration of vessel</p> <p>Declaration of transfer</p> <p>Registration of transfer</p> <p>Transmission of ownership</p> <p>Authorization for holder of a foreign certificate of competency</p> <p>Certification for rating crew</p> |
| Water & Sanitation | Directorate of Water Resources Management | <p>Dredging licence</p> <p>Drilling permit</p> <p>Ease certificate</p> <p>Ground water abstraction permit</p> <p>Hydraulic construction permit</p> <p>Surface water abstraction permit</p> <p>Wastewater discharge permit</p> <p>Construction permit</p> |

| SECTOR | ISSUING AUTHORITY | LICENSE |
|------------------|--|---|
| | National Environmental Management Authority | Environmental Impact Assessment License for noise in excess of permissible noise levels License for transportation and storage of waste License to own or operate a water treatment plant or disposal site Pollution license Wetland resource use permit |
| Manufacturing | Ministry of Trade, Industry and Cooperatives | Approval of construction Certificate of Examination of Steam Boiler Certificate of exemption Certificate of Registration of a Work Place Notification of use of a hoist or lift Notification of use of mechanical power Report of examination of a steam receiver Report of examination of an Air receiver |
| Local Government | Kampala City Council | Building permit Demolition certificate Enguli Manufacturers Jaggery license Fish License Food Permit |
| | Kampala City Council | Local service tax Lorries & Trucks Markets Occupation permit Outdoor advertisement Passport fee Refuse Fees Stage plays and public entertainment Street parking Taxi Parks Trading License-Agencies-Grade I Trading License-Agencies-Grade II Trading License-Apartments-Grade I Trading License-Apartments-Grade II Trading License-ATM machines-Grade I Trading License-ATM machines-Grade II Trading License-Auctioneers/ bailiffs/ court brokers-Grade I Trading License-Auctioneers/ bailiffs/ court brokers-Grade II Trading License-Auditors/ Accountants/ Tax consultants-Grade I Trading License-Auditors/ Accountants/ Tax consultants-Grade II Trading License-Bakery-Grade I Trading License-Bakery-Grade II Trading License-Banks-Grade I Trading License-Banks-Grade II Trading License-Bar/ pub/ inn-Grade I Trading License-Bar/pub/inn-Grade II |

| SECTOR | ISSUING AUTHORITY | LICENSE |
|--------|----------------------|--|
| | Kampala City Council | Trading License-Boutique/ beauty salon-Grade I Trading License-Boutique/ beauty salon-Grade II Trading License-Brick/ Block/ Concrete products workshop-Grade I Trading License-Brick/ Block/ Concrete products workshop-Grade II Trading License-Business consultants-Grade I Trading License-Business consultants-Grade II Trading License-Butchery-Grade I Trading License-Butchery-Grade II Trading License-Car special hire services-Grade I Trading License-Car special hire services-Grade II Trading License-Car washing Bay-Grade I Liquor license |

| SECTOR | ISSUING AUTHORITY | LICENSE |
|--------|----------------------|---|
| | Kampala City Council | Trading License-Clearing & forwarding-Grade I Trading License-Clearing & forwarding-Grade II Trading License-Clinics-Grade I Trading License-Clinics-Grade II Trading License-Commission agent-Grade I Trading License-Commission agent-Grade II Trading License-Construction Company-Grade I Trading License-Construction Company-Grade II Trading License-Cottage industry-Grade I Trading License-Cottage industry-Grade II Trading License-Day Care Centre-Grade I Trading License-Day Care Centre-Grade II Trading License-Decorators-Grade I Trading License-Decorators-Grade II Trading License-Dobi-Grade I Trading License-Dobi-Grade II Trading License-Driving School-Grade I Trading License-Driving School-Grade II Trading License-Drug store-Grade I Trading License-Drug store-Grade II Trading License-Dry cleaner (large)-Grade I Trading License-Dry cleaner(large)-Grade II Trading License-Duplicate license fee-Grade I Trading License-Duplicate license fee-Grade II Trading License-Eating house-Grade I Trading License-Eating house-Grade II Trading License-Engravers-Grade I Trading License-Engravers-Grade II Trading License-Entertainment venue/ theatre/ disco/ hall/ video hall-Grade I Trading License-Entertainment venue/ theatre/ disco/ hall/ video hall-Grade II Trading License-Events management companies-Grade I Trading License-Events management companies-Grade II Trading License-Events managers-Grade I Trading License-Events managers-Grade II Trading License-Flower selling (florist)-Grade I Trading License-Flower selling (florist)-Grade II Trading License-Foreign exchange bureau-Grade I Trading License-Cleaning Services firm-Grade II |

| SECTOR | ISSUING AUTHORITY | LICENSE |
|--------|----------------------|---|
| | Kampala City Council | Trading License-Grinding Mills-Grade II Trading License-Grocery-Grade I Trading License-Grocery-Grade II Trading License-Guest house-Grade I Trading License-Guest house-Grade II Trading License-Hawkers-Grade I Trading License-Hawkers-Grade II Trading License-Herbal/ local medicine-Grade I Trading License-Herbal/local medicine-Grade II Trading License-Hostel (less than 50 rooms)-Grade I Trading License-Hostel (less than 50 rooms)-Grade II Trading License-Hostels(100 rooms or more)-Grade I Trading License-Hostels(100 rooms or more)-Grade II Trading License-Hostels(more than 50 rooms but less than 100)-Grade I Trading License-Hostels(more than 50 rooms but less than 100)-Grade II Trading License-Hotel business(hotel with 3 stars & above)-Grade I Trading License-Hotel business(hotel with 3 stars & above)-Grade II Trading License-Hotel business(hotel with less than 3 stars-Grade I Trading License-Hotel business(hotel with less than 3 stars-Grade II Trading License-Imaging company-Grade I Trading License-Imaging company-Grade II Trading License-Insurance Company-Grade I Trading License-Insurance Company-Grade II Trading License-Internet café-Grade I Trading License-Internet café-Grade II Trading License-Investigation-Grade I Trading License-Investigation-Grade II Trading License-IT solutions-Grade I Trading License-IT solutions-Grade II Trading License-Kiosk-Grade I Trading License-Kiosk-Grade II Trading License-Legal firms-Grade I Trading License-Legal firms-Grade II Trading License-Lodges(20 rooms and above)-Grade I Trading License-Lodges(20roomsandabove)-GradeII Trading License-Grinding Mills-Grade I |

| SECTOR | ISSUING AUTHORITY | LICENSE |
|--------|----------------------|--|
| | Kampala City Council | Trading License-Motor Vehicle Garage-Grade II Trading License-Night club-Grade I Trading License-Night club-Grade II Trading License-Nursery school-Grade I Trading License-Nursery school-Grade II Trading License-Nursing home-Grade I Trading License-Nursing home-Grade II Trading License-Office-Grade I Trading License-Office-Grade II Trading License-Other service/repair workshops-Grade I Trading License-Other service/repair workshops-Grade II Trading License-Pharmacy-Grade I Trading License-Pharmacy-Grade II Trading License-Photo Booth-Grade I Trading License-Photo Booth-Grade II Trading License-Pool table-Grade I Trading License-Pool table-Grade II Trading License-Power generation-Grade I Trading License-Power generation-Grade II Trading License-Printing and Publishing firm-Grade I Trading License-Printing and Publishing firm-Grade II Trading License-Private car park-Grade I Trading License-Private car park-Grade II |
| | Kampala City Council | Trading License-Maternity home-Grade I Trading License-Maternity home-Grade II Trading License-Members Club-Grade I Trading License-Members Club-Grade II Trading License-Metal Workshop-Grade I Trading License-Metal Workshop-Grade II Trading License-Mineral dealers-Grade I Trading License-Mineral dealers-Grade II Trading License-Mobile network services providers-Grade I Trading License-Mobile network services providers-Grade II Trading License-Money lending & savings Institution-Grade I Trading License-Money lending & savings Institution-Grade II |

| SECTOR | ISSUING AUTHORITY | LICENSE |
|--------|----------------------|---|
| | Kampala City Council | Trading License-Private public toilets and bath rooms-Grade I Trading License-Private public toilets and bath rooms-Grade II Trading License-Private Secondary School-Grade I Trading License-Private Secondary School-Grade II Trading License-Private University-Grade I Trading License-Private University-Grade II Trading License-Radio station-Grade I Trading License-Radio station-Grade II Trading License-Restaurant-Grade I Trading License-Restaurant-Grade II Trading License-Retailers Grade I Trading License-Satelite connection-Grade I Trading License-Satelite connection-Grade II Trading License-Scrap dealers-Grade I Trading License-Scrap dealers-Grade II Trading License-Security firm-Grade I Trading License-Security firm-Grade II Trading License-Security/ investigations companies-Grade I Trading License-Security/ investigations companies-Grade II Trading License-Showroom-Grade I Trading License-Showroom-Grade II Trading License-Slot machines-Grade I Trading License-Slot machines-Grade II Trading License-Small cottage industry-Grade I Trading License-Small cottage industry-Grade II Trading License-Supermarket-Grade I Trading License-Supermarket-Grade II Trading License-Surveyors/ engineers/ valuers/ architects-Grade I Trading License-Surveyors/ engineers/ valuers/ architects-Grade II Trading License-Tertiary Institution-Grade I Trading License-Tertiary Institution-Grade II Trading License-Transfer of license fee-Grade I Trading License-Transfer of license fee-Grade II Trading License-Transporters-Grade I Trading License-Transporters-Grade II Trading License-Travel & tour agent-Grade I |
| | Kampala City Council | Trading License-Travel & tour agent-Grade II Trading License-Private primary school-Grade II |

Source: Ministry of Finance, Planning & Economic Development

Uganda Investment Authority
Plot 22B Lumumba Avenue ,
TWED Plaza
P.O. Box 7418 Kampala, Uganda

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Fax: +256-414-342 903
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www.ugandainvest.go.ug