

The Profit 2007 Regional Investment Conference in Kampala, Uganda is a component of the ProInvest programme which is a common initiative of the European Commission (EC) and institutions from the ACP states (Africa, the Caribbean and the Pacific).

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The authors accept sole responsibility for the profile which does not necessarily reflect the views of the organizers: ProInvest, the Centre for the Development of Enterprise (CDE), the European Investment Bank (EIB), the African Union (AU) and the Common Market for Eastern and Southern Africa (COMESA).

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1. BUSINESS OVERVIEW

1.1 Key Economic Indicators

Table 1 shows the recent trend for selected key economic indicators using the most up-to-date available information. More general country information is provided in the websites referred to in Section 5.0 at the end of this report.

Table 1: Key Economic Indicators 2002-06

	2002	2003	2004	2005	2006
Population (mn.)	25.965	26.869	27.821	28.816	29.854
Population Growth (%)	3.40	3.50	3.50	3.60	3.60
GDP (US\$ bn. at current prices)	5.835	6.243	6.824	8.729	9.403
GDP per capita (US\$ at current prices)	225	232	245	303	315
GDP growth at constant prices (%)	6.90	4.40	5.70	6.00	5.50
Current account balance (US\$ mn.)	(285)	(359)	(68)	(137)	(467)
Inflation Rate (%)	-2.00	5.70	5.00	8.00	6.70
Exchange Rate: annual average Ugandan shillings to US\$	1,797.6	1,963.7	1,810.3	1,780.7	1,834.9

Sources: COMTRADE, World Development Indicators, Oanda.com

1.2 Economic Context

In 2006, total Gross Domestic Product (GDP) amounted to some US\$9.4 billion at current market prices. Over the past five years from 2002, real GDP growth has been relatively strong varying between 4.4 percent and 6.9 percent per year. Whilst GDP increased by over 60 percent at current market prices between 2002 and 2006, GDP per capita only increased by 40 percent because of the relatively high rate of population growth at around 3.5 per cent.

The GDP's composition is led by the services sector accounting for an estimated 49 percent in 2006, followed by agriculture with 29 percent and industry with 22 percent.

In late 2005, the International Monetary Fund (IMF) provided 100 percent relief on all debt incurred by Uganda to the IMF before January 2005 that remained outstanding. This totalled about \$109 million.

The international donor community has played a significant role in Uganda's development over the last twenty years. According to the OECD statistics, it received almost \$2 billion in development assistance in both 2004 and 2005. Bilateral aid accounted for about 55 percent of total, with the US being the major contributor with \$225 million on average in each of these two years. Among the multilateral agencies, the World Bank's IDA provided an annual average of \$344 million during the same period, followed by the EU with \$103 million.

1.3 Population and Labour Force

The population was estimated at almost 30 million in 2006 with an overall population density of about 126 persons per km². The total labour force is estimated at approximately 13.76 million persons in 2006, with 82 percent engaged in the agriculture, 13 per cent in services and five per cent in industry.

1.4 General Institutional and Regulatory Framework

In 1995, the Government restored the legal system to one based on English common law and customary law.

In addition, the Government has set up a 'one-stop shop' for investors (see Section 4.1.2 below). Fiscal incentives have been revised to attract foreign investment and new regulations allow for tax breaks and mutual agreements to avoid double taxation.

Land tenure

There are 4 major land regimes in Uganda:

- Customary Land Tenure: over 80 percent of land in Uganda is held on customary tenure system.
- Freehold Land Tenure: very little land is held under freehold tenure in Uganda. Freehold is the premier mode of private land ownership under English law. Transactions involving freehold land are governed by the Registration of Titles Act.
- Mailo Land Tenure: land held under mailo tenure is confined to Buganda (Central Uganda). Essentially feudal in character, the mailo tenure system recognises occupancy by tenants (locally called Kibanja holders), whose relationship with their overlords is now governed by the provisions of the Land Act.
- Leasehold Tenure: the leasehold applies to every tenure regime whether customary, freehold or mailo. The leasehold transactions, being essentially contractual, allow parties to define the terms and conditions of access in such a manner as to suit their reciprocal land use needs.

According to the Land Act (1998), foreign investors (self or company) are not allowed to buy land outright, but can lease land for up to 99 years. However, companies with local shareholding participation of 50% or more can buy land outright but the transactions must follow the nature on the land tenure.

1.5 Local Skills Base

Unemployment is high in Uganda and labour is plentiful and inexpensive. However, the labour force is relatively unskilled and on-the-job training is essential.

The Hotel Training and Tourism Institute (HTTI) provides training for hotel and catering staff. Makerere University Business School (MUBS) training and degree awards in tourism and hospitality.

1.6 Infrastructure Services

1.6.1 International access

Air

Entebbe International Airport (EBB) is located some 40km south-west of Kampala.

International air services are provided, amongst others, by Air Tanzania (Dar Es Salaam) British Airways (London-Heathrow) Brussels Airlines (Brussels, Nairobi) Eagle Air (Dar Es Salaam) East African Airlines (Kisangani, Kinshasa) EgyptAir (Cairo) Emirates (Dubai, Nairobi) Ethiopian Airlines (Addis Ababa, Lilongwe) Kenya Airways (Nairobi) KLM Royal Dutch Airlines (Amsterdam) Rwandair Express (Kigali) Royal Daisy Airlines (Juba) South African Airways (Johannesburg) Sudan Airways (Khartoum) Precision Air (Mwanza, Kilimanjaro/Arusha) and Victoria International Airways (Nairobi, Juba, Johannesburg).

The former national carrier, Uganda Airways, is no longer in operation.

Water

Boat services operate on Lake Victoria between Kampala and Mwanza in Tanzania.

Land

There are connections with all neighbouring countries, although borders are not always open. There is a daily bus service between Kampala and Arusha, Dar es Salaam and Nairobi. Uganda Railways do not operate passenger services at present.

1.6.2 Internal transport

Air

Eagle Air and United Airlines offer flights from Entebbe to most major towns. Charter flights are also available.

Water

Local boat services link Entebbe to the Ssesse Islands.

Road

The road network extends over 28,332km. The roads are of variable quality and radiate from Kampala, although the network is sparse in the north. There are still some army and police check points.

1.6.3 Telecommunications

Telephone: IDD is available to and from principal cities and towns. The country code is 256. Service for local calls is unreliable.

Mobile: coverage extends to all major cities and towns and international roaming agreements exist with international mobile phone companies.

Internet: there are internet cafes in Kampala and most large towns.

2. TOURISM SECTOR

The trend in international visitor arrivals has been strongly upward in recent years, with the number increasing from 193,000 in 2000 to 512,000 in 2004 (but falling back somewhat to 468,000 in 2005).

2.1 Product Offer

The distinctive attraction of Uganda as a tourist destination arises out of the variety and abundance of its game stock and its unspoilt scenic beauty. With terrain ranging from the open savannah to impenetrable mountain rain forest and the vast expanse of Lake Victoria, Uganda offers an interesting contrast to the wide East African plains.

The focus of Uganda's tourism drive in recent years has been the rare mountain gorilla. This has been very successful, with the demand for viewing permits currently far in excess of existing supply. The response of Government has been to initiate the development and promotion of alternative tourism products, including avi-tourism (bird watching), sport fishing, boating, game viewing, walking and trekking, mountaineering and white water rafting.

Main Attractions

People and Culture

Situated at the geographical heart of Africa, Uganda has long been a cultural melting pot, as evidenced by the 30-plus different indigenous languages and an equally diverse cultural mosaic of music, art and handicrafts.

National Parks

A network of ten national parks and several other protected areas offers visitors the opportunity to experience Uganda's biodiversity and varied eco-systems:

- Murchison Falls National Park: the country's largest protected area whose palm-studded grassland supports dense wildlife populations. Launch trips are available along the Nile below the spectacular waterfall;
- Rwenzori Mountains National Park encompass the eastern slopes of the mountains which are a world-class hiking and mountaineering destination;
- Queen Elizabeth National Park: the lush savannah offers prime grazing to buffalo, elephant and antelope and has a checklist of 600-plus bird species;
- Bwindi Impenetrable Forest National Park, best known for its gorilla tracking, but it also provides refuge for elephant, chimpanzee, monkeys and antelope;
- Mgahinga National Park: here mountain gorillas also form the main attraction;
- Semliki National Park is of special interest to ornithologists;
- Kibale National Park hosts a population of more than 1,000 chimpanzees as well as half-a-dozen readily observed monkey species;
- Lake Mburo National Park: this is the closest savannah reserve to Kampala;
- Mount Elgon National Park (on the Kenya border) presents a range of Afro-montane forest, grassland and moorland habitats for hikers and climbers; and
- Kidepo Valley National Park: located in the far north-east, this remote, wild and little-visited park provides refuge to a long list of dry-country species not found elsewhere in the country, including cheetah.

Gorillas and Primates

Uganda's star attraction is the endangered mountain gorilla, the bulkiest of living primates, fewer than 700 individuals survive, divided between Bwindi National Park and the Virunga Mountains. Within Uganda, five habituated gorilla troops – four in Bwindi and one in Mgahinga National Park - can be visited by a total of 30 tourists daily. Chimpanzee communities have been habituated for tourism at Kibale Forest, Budongo Forest, Queen Elizabeth National Park's Kyambura Gorge and on Ngamba Island in Lake Victoria. Monkeys are also exceptionally well represented in Uganda, especially at Kibale Forest, Mgahinga National Park and Murchison Falls.

Source of the Nile

The source of the Nile - identified by Speke as a small waterfall flowing northwards out of Lake Victoria - now lies submerged beneath the Owen Falls Dam at Jinja.

Lakes and Ssesse Islands

Roughly one-quarter of Uganda's surface area consists of wetlands, including marshy expanse of Lake Kyoga, the north-western third of Lake Victoria and the scenic Lakes Albert and Edward which border the Democratic Republic of Congo. Lake Bunyonyi is one of Uganda's most rapidly developing wetland destinations as well as the cluster of 200 crater lakes that extends northward from Queen Elizabeth National Park to Fort Portal. Several forest-fringed lakes in the vicinity of Kibale Forest have been developed as community-based eco-tourism projects.

The 84 islands - some large and dotted with local fishing villages, others small and uninhabited - of the Ssesse Archipelago make an ideal retreat after a long safari. They also offer good opportunities for bird watching and fishing for Nile Perch.

Bird watching

Transitional to the East African savannah and the western rainforests, Uganda is Africa's most complete bird watching destination, with more than 1,000 recorded species. Key sites include Bwindi National Park; Queen Elizabeth National Park; Semliki National Park; Mabamba Swamp, near Entebbe; the community-run guided trail through Bigodi Wetland, near Kibale; Murchison Falls National Park; and Lake Bisina in eastern Uganda.

Eco-tourism

The Uganda Forest Department has set up several forest eco-tourism projects at rainforest sites on popular tourist routes around the country. Camping facilities or traditional African bandas are available to accommodate travellers.

Adventure

Uganda is fast developing as a destination for adventure tourism. Bujagali Falls, which lies downstream of the Source of the Nile, is the launching point for a commercial white-water rafting route that ranks as one of most thrilling but also one of the safest in the world. Other activities at Bujagali include kayaking, mountain biking, quad-biking and a new 44 metre-high bungee jump from a cliff above the Nile. Uganda also offers some of Africa's top hiking and climbing possibilities in the Rwenzori Mountains, Mount Elgon and the Virunga Mountains. There is excellent fishing in numerous inland waters and the opportunity for sport fishing at Murchison Falls National Park.

Cities and towns

Kampala, the capital, is set among hills with fine modern architecture, tree-lined avenues, cathedrals, mosques and palaces of the old Kingdom of Buganda, and the Uganda Museum. The Kabaka Tombs are on Kasubi Hill. *Jinja*, the second-largest town, lies on the shores of Lake Victoria, at the Source of the Nile. There is a lively Saturday market. *Entebbe* is the main gateway to Uganda for air travellers. It has fine botanical gardens and a lakeside beach, although bathing is not advisable because of the danger of bilharzia. *Fort Portal* is a good base for exploring the Ruwenzori Mountains, while *Kisoro* is the starting point for climbing Mounts Muhavura and Mgahinga.

2.2 Accommodation

Almost 80 percent of the accommodation of tourist standard is concentrated in and around Kampala, with the bulk of the remainder - around 430 beds - distributed among the various up-country tourist zones. Outside of the capital, most national parks and other tourist hubs are serviced by at least one upmarket lodge. Average annual occupancy levels at the leading hotels are over 60 percent and are expected to rise even higher with the increasing numbers of tourist arrivals. The largest hotel is the Sheraton Kampala with 264 rooms. Serena Hotel Group acquired Nile Hotel International in January 2004 for a 30-year lease on condition that it invests a minimum of \$15 million in upgrading.

2.3 Market Trends

2.3.1 Visitor arrivals

The estimated number of foreign visitors was 468,000 in 2005, of which an estimated 76 percent were from other African countries (particularly Kenya) and the remaining 24 percent from other countries (particularly the United Kingdom and the United States). Arrivals from Europe represented 13 percent of the total in 2003.

Table 2: International tourist arrivals, 1995-2005

	1995	2001	2002	2003	2004	2005*
International tourist arrivals	159,899	205,287	254,212	304,656	512,000	468,000
of which						
Africa	102,129	149,907	192,278	233,043
Other Regions	57,770	55,380	61,934	71,613
- <i>United Kingdom</i>	14,124	13,626	15,168	17,176		
- <i>United States</i>	7,598	10,550	11,923	13,176		
- <i>Rest of World</i>	36,048	31,204	34,843	41,261		

* estimate

Sources: Ministry of Tourism, Trade and Industry and World Tourism Organisation

Purpose of visit

Leisure visitors are estimated to account for approximately 20 percent of the total.

Mode of transport

In 2005, over 54 percent of arrivals in the country were by land (mainly from Kenya). The remaining 46 percent arrived by air.

2.3.2 Visitor expenditure

In 2005, international tourism receipts amounted to an estimated \$355 million, compared with \$266 million in 2004, \$184 million in 2003 and \$165 million in 2000. This compares with total export earnings from coffee, tea and other products of approximately \$962 million in 2006.

2.4 Institutional Arrangements

The overall planning and development of Uganda's tourism industry is the responsibility of the Ministry of Tourism, Trade and Industry. The main responsibility for tourism promotion lies with the Uganda Tourist Board (UTB).

The main industry associations established by the private sector to promote business and also to develop professionalism in the tourism industry, are the Uganda Tourist association (UTA), the Hotel and Catering Association of Uganda (HCAU), the Association of Uganda Tour Operators (AUTO), the Uganda Association of Tourism Training Institutions (UATTI), the Private Sector Foundation (PSF) and the Uganda Association of Travel Agents (TUGATA).

The Uganda Wildlife Authority (UWA) for the conservation and management of Uganda's wildlife and protected areas.

2.5 Future Outlook

Uganda's travel and tourism economy is expected by WTTC to grow by 6.1 percent in 2007 and by 4.8 percent per annum, in real terms, between 2008 and 2017.

Inbound international tourism is expected to maintain the recent upward trend. Regional tourism is also expected to register a marked increase as a result of enhanced regional economic integration through the East African Community (EAC) and the Common Market for Eastern and Southern Africa (COMESA).

3. INVESTMENT OPPORTUNITIES IN TOURISM

Uganda offers an exceptional opportunity for investors. Located almost in the centre of the African market, it is already the preferred home of several leading global corporations and international Organisations. It is one of the fastest growing economies and one of the most liberal countries for foreign investment in Africa. Because the country's economy is still young, the potential and the choice of investment opportunities are much wider for the prospective investor than would be the case in more developed economies.

Reasons for investing in Uganda's tourism sector include

- Uganda has untapped potential in the form of eco-tourism, bird life, contrasting scenery and substantial game populations;
- Uganda's tourism resources are modestly exploited and less commercialised than competing destinations giving the tourist a true African safari without the disruption of too many other tourists;
- The competition among players in the sector is less intense than in other countries; and
- Uganda, with its unique attractions, can be marketed both as a long-haul destination or as part of a regional package including other East African countries.

3.1 Investment Sectors

In line with Uganda's changed tourism focus, the type of investment opportunities that exist have more to do with the new (rather than existing) tourism products that the country offers. The available investment opportunities - identified in the UIA's Tourism Profile – include, but are not limited to, the following:

Tour Operators

There are many opportunities for new and innovative tour operators who have international contacts and are able to market Uganda internationally as a new destination based on the special attractions currently being promoted by the Uganda Tourist Board. These include: adventure holidays; sport fishing; eco-tourism; and avi-tourism (bird watching).

Water sports and other related activities

Opportunities exist to take advantage of Uganda's considerable water bodies including the launch of luxury boat cruises on Lake Albert and Lake Victoria. Currently, this is an area that is still largely unexploited. Water sports such as white water rafting, skiing, boat racing, etc. are also potential opportunities.

Accommodation

In the 3-5 star hotel categories, there is a significant bed capacity deficit. Given the present and expected growth in demand, there is need for new tourist accommodation, both in the main cities and towns and in and around the various national parks and reserves. Opportunities also exist in the serviced apartments sector, especially in Kampala.

Conferences and Incentive Travel

Uganda is presently constrained by a lack of adequate conference facilities, both in terms of accommodation and also in terms of event and exhibition facilities. The Nile Hotel International Conference Centre is the only existing large facility (with accommodation for up to 1,700 delegates in the main room). Other hotels and lodges can offer smaller facilities. The opportunities for investors in this area include the establishment of world-class accommodation and exhibition facilities that can attract major international conferences and events, and the establishment of event planning companies to organize such events.

National Park Concessions

There are still a number of opportunities to secure long-term concessions in Uganda's national parks, either through the rehabilitation of existing facilities or through the construction of new facilities in both the old and newly designated parks. More information on the status of concessions may be obtained from the Uganda Wildlife Authority.

Joint Ventures

UIA maintains a database of local and foreign companies seeking joint ventures in tourism and other sectors.

4. INVESTMENT ENVIRONMENT

4.1 Investment Framework

4.1.1 Government policy

The Uganda Government's economic strategy is to modernize the economy through relying on markets and the efforts of entrepreneurs as the basis for efficient and productive economic activity. Government's major role in Uganda's private sector driven economy is mainly to provide the necessary legal policy and physical infrastructure for private investment to flourish. This strategy, endorsed by the World Bank, other donors and the private sector, is already showing results as witnessed by the country's strong economic performance in the last ten years.

Established in 1991, the Investment Code aims at providing conditions that are favourable for investment. The Code provides for certain incentives to investors. The Code allows foreign investors to invest in all fields except those, which compromise national security and ownership of land. Foreign investors may, however, lease land for up to 99 years. Foreign investors can also participate in joint ventures involving the outright purchase of agricultural land. For such cases, Ugandans must hold the majority stake. Aside from this, Uganda imposes no limitations whatsoever, on foreign investors. Full 100 percent foreign ownership of investments in the country is allowed. Foreign investors are also free to bring in and take their capital out of Uganda with no restrictions.

4.1.2 Investment agencies

The Uganda Investment Authority (UIA) is a one-stop facilitator for investors, mandated by an Act of Parliament (1991) to attract, promote and facilitate investment in Uganda. UIA assists investors to expediently implement their business plans and serves as the first and most comprehensive point of contact for investors in Uganda. In addition, UIA continually advises Government on the best practice policies regarding investment in Uganda as a whole.

UIA offers the following services to investors:

- Providing first-hand information on investment opportunities in Uganda;
- Promoting Uganda as an investment location for investors;
- Helping investors to implement their project ideas through professional advice and assistance in locating relevant project support services;
- Helping investors to secure secondary licences and approvals;
- Arranging contacts for investors and organizing itineraries for visiting foreign missions within the country;
- Assisting investors in seeking joint venture partners and funding;
- Ensuring protection for intellectual property and trade secrets where technology transfer is involved; and
- Reviewing and making policy recommendations to government about investment.

4.1.3 Investment guarantees

Uganda is a member of the Multilateral Investment Guarantee Agency (MIGA) which protects investors against non-commercial risks.

4.2 Investment Incentives

Uganda's fiscal incentive package provides for generous capital recovery terms, particularly for investors whose projects entail significant investment in plant and machinery and whose investments are medium/long term. The incentives package provides generous capital recovery terms, particularly for investors whose projects entail significant investment in plant and machinery and whose investments are likely to yield profits over the longer term.

The rights and incentives package includes:

- Zero rate of tax on imports of plant, machinery and equipment;
- 7% import duty on specialised tourist vehicles
- VAT deferral facility for plant, machinery and specialised tourist vehicles;
- Guaranteed repatriation of profits and dividends;
- Guarantee against non-commercial risks through the Multilateral Investment Guarantee Agency (MIGA);
- Up to 100% foreign ownership of investments allowed;
- Capital allowances of 50% on plant and machinery for projects located in Kampala, Entebbe, Namanve, Jinja and Njeru. Outside these areas the deductible allowance is 75%. The initial allowance on hotel and industrial buildings is 20%;
- Start-up costs spread over the first four years at 25% per annum;
- 100% allowance on scientific research expenditure and training expenditure also deductible once from the company's income;
- A deductible annual allowance on depreciable assets under the declining balance method, varying from 40% for computers and data handling equipment to 5% for industrial buildings hotels and hospitals;
- A nominal corporate tax rate of 30% which is amongst the lowest in Africa; and
- Duty drawback/refund for exporters.

Enhanced incentives are available in Export Zones (such as the World Bank-supported Kampala Industrial and Business Park), including (provisional) a ten year corporation tax holiday; duty exemption on raw materials, plant and machinery and other inputs; stamp duty exemption; duty draw back to apply on input of goods from domestic tariff area; no export tax; exemption of withholding tax on interest on external loans; and dividends repatriated to get relief from double taxation.

4.3 Access to Finance

The Bank of Uganda (BOU) is the country's central bank.

4.3.1 Commercial banks

The main commercial banks include: Allied International Bank; Bank of Baroda; Barclays Bank; Cairo International Bank; Centenary Bank; Citibank; Crane Bank; Diamond Trust Bank; Dfcu Bank; National Bank of Commerce; Nile Bank; Orient Bank; Stanbic Bank; Standard Chartered Bank and Tropical Bank.

The Development Finance Company of Uganda group is a consumer bank, mortgage bank, development finance bank and commercial bank in Uganda. The East African Development Bank (EADB) also provides development finance in Uganda, Kenya and Tanzania.

4.3.2 International Financial Institutions

Uganda, as a signatory to the agreement between African, Caribbean and Pacific nations (ACP) and the European Union, known as the Cotonou Agreement, has access to the facilities of the European Investment Bank (EIB).

As a member of the World Bank, the facilities of the International Finance Corporation (IFC) would also be available for projects in Uganda. Other potential development finance sources include the African Development Bank (AfDB), the Development Bank of Southern Africa (DBSA), the East African Development Bank (EADB), the Industrial Development Corporation of South Africa Ltd (IDC) and the New Partnership for Africa's Development (NEPAD).

4.3.3 Transfer of Capital and Profits

Foreign investors with established businesses in Uganda can readily make payments overseas. Payments for imports and service related charges can also be made at the commercial banks without any prior approval. Similarly, dividend and capital payments are allowed subject to the tax laws of the country.

4.4 Residential and Work Visas

All visitors require valid passports, return tickets and sufficient funds for their stay in Uganda. Countries whose nationals do not require visas include all EU countries, most Commonwealth countries and the United States. The Directorate of Immigration is responsible for issuing of work permits. The Directorate's policy requires any investor seeking a key post work permit to invest at least \$100,000 before they will be considered. The UIA will always help eligible companies with a recommendation to acquire work permits for their directors and expatriate employees. However, the ultimate decision to issue the permit rests with the Directorate of Immigration.

4.5 Technical and Promotional Assistance

Generic tourism promotion is undertaken by the Uganda Tourist Board. This function has traditionally been directed through international trade shows where UTB joins with the private sector in promoting Uganda as a destination.

Uganda is a member of the East African Community (EAC) which is the regional intergovernmental organisation of the Republics of Burundi, Kenya, Rwanda, Uganda and Tanzania and aims at widening and deepening co-operation among the partner states in political, economic and social fields for their mutual benefit. The regional co-operation and integration envisaged in the EAC is broad-based, covering tourism and wildlife management as well as trade, investments, industrial development; monetary and fiscal affairs; infrastructure and services; human resources, health, etc.

5. LIST OF KEY CONTACTS

Ministry of Tourism, Trade and Industry

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Useful Websites

- **Ministry of Tourism, Trade and Industry.**
www.mtti.go.ug
- **Uganda Tourist Board**
www.visituganda.com
- **East African Community:** website contains useful profiles on EAC member states: www.eac.int
- **The British Broadcasting Corporation (BBC):** full profiles provide an instant guide to history, politics and economic background of countries and territories, and background on key institutions. http://news.bbc.co.uk/2/hi/country_profiles/default.stm