



# **ECOTOURISM SECTOR STRATEGY, 2006-2008**



January 2006

**Ministry of Tourism, Trade and Industry/United Nations Conference on Trade  
& Development (UNCTAD) Export Development Programme  
Implemented by UEPB**



**UGANDA EXPORT PROMOTION BOARD**

- Compiled by:** The Uganda BioTrade Programme Unit, Uganda Export Promotion Board
- Supervised by:** Ministry of Tourism, Trade and Industry (MTTI)
- With Distance Guidance from:** BioTrade Facilitation Programme/UNCTAD and the International Trade Centre (ITC)
- Background:** The Ecotourism strategy is designed within the framework of the Uganda BioTrade Programme whose overall objective is to promote trade and investment in biodiversity based industries and services, with due consideration of the ecological, social and economic factors. A process approach was applied to the development of the strategy, with stakeholder input and a sector assessment study. The Eco-tourism sector is one of the four selected by the Uganda BioTrade Programme for attention in the 2006-2010 based on the sector strategy here developed, and all activities shall be undertaken in co-operation with the public and private sectors, and civil society.

**Cover picture:** Hartebeest in Murchison Falls National Park

## Table of Contents

<b>Table of Contents</b>		ii
<b>List of Acronyms</b>		iii
<b>1. INTRODUCTION</b>		<b>1</b>
1.1 The Uganda BioTrade Programme		1
<b>2. THE ECOTOURISM SECTOR IN UGANDA</b>		<b>2</b>
2.1 Sector findings		2
2.2 Private Sector participation		4
<b>3. THE ECOTOURISM STRATEGY</b>		<b>4</b>
3.1 Strategy Objective		4
3.2 Strategy Plan		4
3.3 Strategy Implementation		6
<b>Box 1</b>	Factors that influenced the decision for eco-tourism	1
<b>Box 2</b>	Issues influencing sector development in Uganda	3
<b>Table 1</b>	Update on sector developments related to issues raised	6
<b>Annex 1</b>	Ecotourism Value Chain Analysis (VCA) Outcomes	9
<b>Annex 2</b>	Key recommendations from the ecotourism sector study	15

## List of acronyms

ADB	=	African Development Bank
AUTO	=	Association of Uganda Tour Operators
BAR	=	Board of Airline Representatives
CAA	=	Civil Aviation Authority
CBO	=	Community Based Organisation
CBD	=	Convention on Biological Diversity
COBATI	=	Community Based Tourism Initiatives
CPAI	=	Community Protected Area Initiatives
EAC	=	East African Community
EADB	=	East African Development Bank
HCAU	=	Hotel and Caterers Association of Uganda
ITFC	=	Institute of Tropical Forest Conservation
MAAIF	=	Ministry of Agriculture, Animal Industry and Fisheries
MENR	=	Ministry of Energy and Natural Resources
MES	=	Ministry of Education and Sports
MFPED	=	Ministry of Finance, Planning and Economic Development
MJCA	=	Ministry of Justice and Constitutional Affairs
MTTI	=	Ministry of Trade, Tourism and Industry
MUBFS	=	Makerere University Biological Field Station
MUIENR	=	Makerere University Institute of Environment and Natural Resources
MWHC	=	Ministry of Works, Housing and Communication
NAADS	=	National Agricultural Advisory Services
NARO	=	National Agriculture Research Organisation
NEMA	=	National Environment Management Authority
NGO	=	Non-Governmental Organisation
PAMSU	=	Protected Areas Management and Sustainable Use
PMA	=	Plan for the Modernisation of Agriculture
PSFU	=	Private Sector Foundation Unit
RAMSAR	=	The Ramsar Convention — Convention on Wetlands of International Importance
SCOPE	=	Strengthening Competitiveness in Private Enterprise
SNV	=	Netherlands Development Organisation
UBTP	=	Uganda BioTrade Programme
UCOTA	=	Uganda Community Tourism Association
UEPB	=	Uganda Export Promotion Board
UGSTDP	=	Uganda Sustainable Tourism Development Project
UHOA	=	Uganda Hotel Operators Association
UHTI	=	Uganda Hotel Training Institute
UIA	=	Uganda Investment Authority
UIE	=	Uganda Institute of Ecology
UMA	=	Uganda Manufacturers Association
UNCTAD	=	United Nations Conference on Trade and Development
URA	=	Uganda Revenue Authority
UTA	=	Uganda Tourism Association
UTB	=	Uganda Tourist Board
USAID	=	United States Agency for International Development
UWA	=	Uganda Wildlife Authority
UWTI	=	Uganda Wildlife Training Institute
VCA	=	Value Chain Analysis

## 1.0 INTRODUCTION

Tourism is changing rapidly as nature, heritage and recreational destinations become more important, and as conventional tourism is forced to meet tougher environmental requirements. This has presented a challenge to government and private enterprise to develop new approaches to the tourism market.

The term Ecotourism was coined by Lascurain 1983 to describe traveller preferences i.e travel to relatively undisturbed areas — nature based — with an emphasis on education. The concept has been further described by IUCN and others, but the gist of it all is that *ecotourism refers to travel to destinations where the flora, fauna, and cultural heritage are the primary attractions*. Ecotourism is considered the fastest growing market in the tourism industry (World Tourism Organisation 2005) with an annual growth rate of 5% worldwide and representing 6% of the world gross domestic product, 11.4% of all consumer spending.

Source: Sustainable Tourism Info-Sheets 2005

### 1.1 The Uganda BioTrade Programme

The Uganda BioTrade Programme was introduced through Uganda Export Promotion Board in 2003 with funding support from UNCTAD. The programme responds to UEPB's export diversification strategy whose overall objective is to identify high value non traditional products for export. The programme was designed based on a pre-assessment study completed in 2004 whose aim was to assess the level of trade in biodiversity in Uganda, the related legislative framework and the actors active in the sector. The study outcome was positive indicating a high entrepreneurial activity in over 10 sectors, available market opportunities, supportive legislation and the existence of institutional frameworks that could be supported to develop biotrade in Uganda.

The challenges evident during the study included among others, the informal and small businesses that predominated the sector, sector invisibility to policy makers and therefore not included in the country's strategic exports, statistics and other national support programmes, uncoordinated activity and absence of networking systems, low technology levels among the entrepreneurs, unsustainable harvesting methods and thereby degrading the resource base, etc.

The study process was guided by UNCTAD's BioTrade Facilitation Programme and a National Task Force with representation from 10 key stakeholder agencies. The study proposed a national programme framework, and this has since been adopted to guide the development of the biotrade activity in Uganda. Four product groups were selected and prioritised for attention and these include natural ingredients, wildlife trade, carbon trade and ecotourism. For each of the selected sectors, a product profile is prepared and stakeholders identified and invited to a Value Chain Analysis Workshop. The process may be complimented by a sector assessment, all resulting into a sector strategy.

Eco-tourism is one of the entrepreneurial activities mentioned in the National Biotrade Pre-assessment study 2004 as a "bio-service", i.e those activities related to the transformation and commercialisation of the eco-systems (wetlands, forest, open water, etc) by enterprises and communities. The decision to select eco-tourism as a viable sector for biotrade is influenced by the following factors.

#### **Box 1: Factors that influenced the decision for eco-tourism**

- The demonstrable private sector and community interest and commitment to eco-tourism as a trade activity
- Uganda's tourism is primarily nature based
- Contribution of tourism to export earnings, poverty alleviation, employment creation, etc
- Limited development assistance to address micro-level issues such as enterprise development, increased benefit sharing among key actors, etc
- Existence of complimentary development assistance e.g Uganda Sustainable Tourism Development Programme, Protected Areas Management Unit, Strengthening Competitive Private Enterprise, etc
- Interest of Government in sustainable tourism development as a strategy for poverty alleviation - even when there aren't sufficient resources to operationalise this
- A favourable legislative and policy climate for eco-tourism: e.g national frameworks such as Tourism Policy for Uganda, the National Biodiversity Strategy, Forest & Tree Planting Act, Land Act and Uganda's ratification of international conventions such as CBD and RAMSAR

BioTrade refers to those activities of collection/production, transformation, and commercialisation of goods and services derived from native biodiversity (genetic resources, species and ecosystems), under criteria of environmental, social and economic sustainability.

Key among the issues of significance to the Uganda BioTrade Programme is the aspect of transformation and commercialisation of the goods and services, thereby raising the following questions:

- Is the issue of sustainability considered?
- Are the actors motivated enough to utilise the resource sustainably for the present and future generations?
- Are the benefits from the biodiversity based activity equitably shared
- Does the activity contribute to poverty alleviation

## 2.0 THE ECOTOURISM SECTOR IN UGANDA

Tourism plays a key role in leveraging Uganda's export earnings as demonstrated in 2004 statistics with tourism accounting for 45% of the value of service exports i.e USD 316.6m, positioning the sector as key to national development. Based on the positive developments in the sector, a national policy framework was designed in 2003 to respond to the challenges of poverty eradication, increased need for foreign investment, issues of quality and standardisation of tourism, and also to consider social, ecological, and economic factors. Ecological factors are further emphasised in Section 3.2 of the policy:

*“Develop tourism in a sustainable manner, focusing on Agenda 21 issues...Nature is the main attraction and tourism development shall be planned so as to encourage nature friendly product developments.”*

On the social front, involvement of the communities is echoed in the Policy's Strategic Principles i.e Section 6.0, and this is further reinforced in the statement below:

*“Successful tourism must benefit local populations economically and culturally to give them incentives to protect the natural resources which create the attraction. Strategies must be economically feasible if private investors are to support the projects.”* — EcoTourism International.

Botswana is among the few countries in the world with an Ecotourism National Strategy whose overriding objective is to

*“Create an environment in which all elements of tourism development planning and management — from the regulatory framework to vocational training, data collection to grading/accreditation — facilitate, promote and reward the adoption of ecotourism ‘best practices’ by all those involved in the industry.”*

Ecotourism in Botswana is used to benchmark the conventional tourism activity.

## 2.1 Uganda's Key Findings

Through the UNCTAD/BTFP approaches of product selection, mapping, and assessment, information was generated on the ecotourism sector in Uganda with direct input from the stakeholders. This included information on the key actors, current developments, barriers to the development of ecotourism and proposed solutions to these. Annex 1 of this document is a tabulated summary of the issues, possible causes, solutions and responsible parties, while Annex 2 is a summary of the recommendations from the assessment.

## **Box 2: Issues influencing development of eco-tourism in Uganda**

- ❑ **Limited Technical Capacities:** This refers to technical expertise for management of facilities and attractions and related operations such as tours.
- ❑ **Inadequate infrastructure:** In terms of number of facilities, the poor road networks, inadequate flight carriers for international and domestic routes.
- ❑ **Grading and standardisation:** The Government's continual failure to implement the hotel grading system has raised concern. Regional grading standards were developed, but these are yet to be translated into the Act before being adopted at national level. Absence of standards for tourism operations i.e Tour Vehicles, solid waste disposal, etc was cited.
- ❑ **Financing:** Enterprises are unable to access affordable financing and attract foreign investment. This is attributed to low prioritisation in national development, and the low return on investment that has made the sector unattractive to investors.
- ❑ **High operational costs:** Attributed to unfavourable tax regimes, lack of reliable food supplies and low return on investment
- ❑ **Limited market:** This refers to low tourism inflows and absence of the domestic market. Insufficient marketing of Uganda's tourism potential also contributes to the situation
- ❑ **No pricing policy for tourism services:** This has resulted into lack of uniformity in prices issues to tourists
- ❑ **Private Sector development:** Not sufficient support has been rendered to private sector in regard to improving efficiencies and operations towards being competitive and direct support to marketing and promotion. Uganda Tourism Board is mandated to do this, but these are poorly funded by Government
- ❑ **Community participation:** Direct participation in tourism activities is still lacking among this category of stakeholders. This is of concern because the communities are the custodians of the natural resources on which most of the tourism activity is based and therefore should be motivated to conserve this. Protected Area managers have attempted this through the collaborative management arrangement, but potential still exists for further participation and equitable sharing of benefits.
- ❑ **Travel Advisories:** This in most cases results from the poor security situation, epidemics and natural disasters. The issue of a poor image of the country overseas also related, compounded by factors such as corruption — issues regularly publicised by international media and thereby creating the negative image
- ❑ **Insecurity in high tourism areas:** This has continued to profile the country as unsafe and there by subjected to travel advisories
- ❑ **Stakeholder Interaction:** Limited opportunities for stakeholder interface or interaction especially between private sector and public sector
- ❑ **Representation at the EAC level:** Uganda's issues related to tourism are not effectively communicated at regional level
- ❑ **Advocacy for sector developments:** Until recently, this was not possible. The Uganda Travel Association is a private sector apex body that has taken up this responsibility
- ❑ **Product Diversification:** There is over reliance on traditional attractions. Product development has not been given due attention, while planned attractions have not been implemented due to funding constraints
- ❑ **Regulation of sector activities:** No regulatory and monitoring mechanism exists especially in regard to licensing tour operations. This is a set back as the sector is flooded with unserious operators with no formal business setting
- ❑ **Government commitment:** This is lacking as demonstrated by the inability to adequately fund key agencies such as Uganda Tourism Board. The districts are also not supported to develop tourism projects, yet the potential lies in such geographic areas
- ❑ **Public appreciation of value of tourism:** This applies not only to the communities, but also the policy makers. This inability to appreciate the benefits results into low prioritisation of the sector in national planning processes, and degradation of the environment

## 2.2 Private sector participation

Government to tourism sector development may be considered minimal thereby leaving the private sector (pre-dominant actors) to maximise benefits while supporting the growth of the sector i.e “Private sector led growth”. The statement is not taken lightly by the private sector as demonstrated at the VCA stakeholder workshop, “economic feasibility” is the norm among the companies and not sector development.

The tourism sector is among the few in the country with an organised and structured private sector. The Uganda Tourism Association is the umbrella association of tourism associations, with a current membership of 8<sup>1</sup> associations with a further downstream membership pool of 300-plus companies. The UTA is the key engine for growth in the sector and has attracted both donor and Government support to strengthen their activities. Of interest is the diversity of membership, which is a typical representation of the Value Chain.

## 3.0 ECOTOURISM STRATEGY FOR UGANDA

The strategy is designed in light of the current national and international developments, the stakeholder participatory activities and the recommendations arising from the sector assessment (find these attached as Annex 2).

### 3.1 Strategy Objective

To transform and present Uganda’s nature-based tourism activities as ecotourism favoured products and services, acceptable to national and international markets, with due consideration of the ecological and social dimensions while ensuring the economic viability of the enterprises therein.

### 3.2 Strategic Plan

1. To integrate ecotourism into the national development agenda and priorities

- Develop an ecotourism policy and strategic plan
- Conduct study on the social, economic and ecological impact of eco-tourism
- Develop mechanisms to disaggregate tourism data and capture more information on the needs and aspirations of eco-tourism visitors

**Expected Outcome:** *Ecotourism development translated into policy and mechanisms established to ensure a conducive environment for its development*

2. To incorporate the element of sustainability in Uganda’s tourism activity

- Monitor that the tourism activities do not exceed the carrying capacities of the host areas/ecosystems
- Promote the conservation of entire local ecosystems, not just individual species, vistas or sites
- Provide host communities with an incentive to conserve the natural and cultural resources upon which the tourism activity depends

**Expected Outcome:** *Sustainability principles incorporated in all nature based tourism activity*

3. Facilitate the development of a pricing policy for eco-tourism services with due consideration of the costs and benefits accruing, and ensure its application to all projects (i.e within Protected Areas and outside).

**Expected Outcome:** *A pricing policy for eco-system based services designed*

4. To carry out a feasibility assessment of community ownership and management of ecotourism facilities.

**Expected Outcome:** *Community ownership and management of eco-tourism activities reviewed and incentives designed to promote sustainability*

5. To facilitate the development of economically-viable and effectively managed ecotourism enterprises

---

1. Association of Uganda Tour Operators (AUTO), Board of Airline Representatives (BAR), Hotel & Catering Ass. of Uganda (HCAU), The Uganda Ass. Of Travel Agents (TUGATA), Uganda Ass. Of Air Operators (UAAO), Uganda Ass. Of Tourism Training Institutions (UATTI), Uganda Community Tourism Ass. (UCOTA), Uganda Safari Guides Ass. (USAGA), District Tourism Associations (DTAs)

- Facilitate improved access to finance for prospective ecotourism operators with economically-viable business plans.
- Develop the requisite business planning, management and technical expertise among existing and prospective ecotourism operators.
- Improve ecotourism operators' access to information and expert advice

**Expected Outcome:** *Private sector strengthened*

6. To promote marketing initiatives that support the sustainable development and diversification of the tourism industry in Uganda.

- Promote the geographical diversification of Uganda's tourism through the concept of sustainability
- Strengthen inter-sectoral linkages between mutually reinforcing sectors such as wildlife, to maximise the value of Uganda's natural resources, while promoting eco-tourism through the operationalisation of wild use rights as specified in the Wildlife Act
- Support product diversification and cost efficiency through collaborative marketing and promotional activity
- Build a strong image of Uganda as an ecotourism destination through branding based on sustainability concepts
- Provide stakeholders with up-to-date, high quality data regarding changes in market demand/characteristics

**Expected Outcome:** *Tourism product diversification and identification of new attractions based on principles of sustainability and enhancement of the national image as an eco-tourism destination*

7. To enhance understanding of the concept of ecotourism among all stakeholder groups, and to raise awareness of the costs, benefits, opportunities and implications of ecotourism development for each.

- To carry on audience-specific awareness raising activities for Tourists/visitors, and Ugandans

**Expected Outcome:** *Increased understanding of the concept of eco-tourism as a business and increased visibility of the developments on the ground to visitors*

8. To facilitate the development of tourism infrastructure that minimises negative impacts, maximises the benefits of ecotourism, and is sensitive to target market expectations.

**Expected Outcome:** *Tourism infrastructure development activities integrate environmental concerns and is sensitive to target market requirements*

9. To review existing tax regimes to accommodate incentives for ecotourism development at all levels of the value chain

**Expected Outcome:** *Tax regimes reviewed to accommodate ecotourism development*

10. To design specific mechanisms to enhance domestic marketing

**Expected Outcome:** *Marketing strategies designed for domestic tourism promotion and marketing*

11. To promote consistently high quality ecotourism standards throughout the country's tourism industry in line with international target market expectations.

- To facilitate the development of guidelines, standards and certification mechanisms for the ecotourism sector
- Encourage and reward adherence to ecotourism best practices by tourism enterprises in Uganda.

**Expected Outcome:** *Ecotourism standards developed and adopted by companies and communities*

12. To facilitate the development of Uganda's ecotourism industry through enhanced networks and interaction among the key sector players, e.g research institutions, universities, private sector associations, public agencies, NGOs, etc.

- Establish a forum to air views related to ecotourism and instill mechanisms to address these
- Ensure that non-tourism development activities do not undermine ecotourism development strategies
- Promote and facilitate the development of mutually-beneficial relationships within and between actors in the Value Chain

**Expected Outcome:** *Networking forums such as internet based, workshops, bulletins, etc operational*

### 3.3 Strategy Implementation

Critical to the implementation of the strategy are factors that may influence the process by way of facilitation, committed participation, stakeholder interest, etc. Ecotourism development in Uganda may be regarded as “young” as reflected in the sector assessment report prepared by the Biotrade Programme. The document provides an overview of developments at policy level, current projects, private sector and community activity, etc. It is therefore of paramount importance that these constitute a strategic entry to strategy implementation.

#### ● Government Initiatives

The Ministry of Tourism, Trade and Industry (MTTI) is the public institution mandated to regulate the tourism activity through selected departments and parastatal agencies such as UWA and UTB.

The Ministry is also implementing tourism projects funded by the EU and the World Bank title Uganda Sustainable Tourism Development Programme (USTDP) and Protected Areas management Unit (PAMSU) respectively. At bilateral level, USAID is implementing the Strengthening Competitive Private Enterprise (SCOPE) to support tourism promotion and marketing. The specific developments are highlighted in Table 1.

**Table 1: Update on sector developments in relation to the issues**

Issue	Developments	Responsibility
a <b>Training</b>	<ul style="list-style-type: none"> <li>- Expansion of HTTI Training facility in plan</li> <li>- Finalisation and adoption of Training Curriculum shall assure quality products</li> <li>- Training conducted for tour operators on basic enterprise management</li> </ul>	<ul style="list-style-type: none"> <li>HTTI</li> <li>HTTI/MTTI</li> <li>UGSTDP</li> </ul>
b <b>Grading of Accommodation</b>	<ul style="list-style-type: none"> <li>- Regional standard exists, pending translation into an Act</li> <li>- National standard pending translation into a Bill</li> </ul>	<ul style="list-style-type: none"> <li>MTTI</li> <li>MTTI</li> </ul>
c <b>Financing</b>	<ul style="list-style-type: none"> <li>- Development fund to be generated through a planned ‘Levy’.</li> <li>- The funds to support training, marketing and district activities</li> </ul>	<ul style="list-style-type: none"> <li>MTTI/UTB</li> </ul>
d <b>Infrastructure</b>	<ul style="list-style-type: none"> <li>- Maintenance of all road networks in Protected Areas with funding from World Bank</li> <li>- Trunk Roads through National Parks maintained by Ministry of Works, Housing &amp; Communication</li> <li>- Air transport has registered developments e.g KLM new flight, increase in seats by KQ</li> <li>- Development of new camps in Kidepo National Park, Ishasha and Lake Mburo National Park</li> <li>- Serena Hotel Chain is looking for concessions outside Kampala</li> </ul>	<ul style="list-style-type: none"> <li>PAMSU/UWA/MTTI</li> <li>PAMSU/MWHC</li> </ul>

Issue	Developments	Responsibility
e Tax Exemptions	<ul style="list-style-type: none"> <li>- Issue was raised by UTA, PSFU and MFPEP and is being handled</li> <li>- A study is planned on tax related issues in the sector to support the decision making process on tax exemption</li> </ul>	UTA/PSFU  UGSTDP
f Marketing & Promotion	<ul style="list-style-type: none"> <li>- The "tourism levy" to support promotion and marketing functions of UTB</li> <li>- Rehabilitation of national image and international marketing activities e.g CNN advert</li> </ul>	MTTI/UTB  UGSTDP, SCOPE, TERP, MTTI
g Private sector Strengthening	<ul style="list-style-type: none"> <li>- UTA is planned for restructuring to accommodate the increased demand for private sector support</li> <li>- UTA and AUTO have benefited from selected donor support</li> </ul>	UTA/UGSTDP  UGSTDP
h Community participation	<ul style="list-style-type: none"> <li>- On-going efforts such as UCOTA and selected support by SNV have been registered</li> </ul>	UGSTDP, SNV, UCOTA
i Travel Advisories	<ul style="list-style-type: none"> <li>- There is evidence of tourists that have ignored travel advisories and visited the country</li> </ul>	
j Implementation of Planned Attractions	<ul style="list-style-type: none"> <li>- UWA has opened up concessions and is encouraging the transformation of private land to more sustainable practices</li> <li>- Investor Guides being developed for the UWA concessions</li> </ul>	UWA  UGSTDP/UWA
k District participation	<ul style="list-style-type: none"> <li>- District Tourism Plans developed in 10 districts with support from the World Bank</li> </ul>	PAMSU
l Representation at EAC	<ul style="list-style-type: none"> <li>- PAMSU plans to support this</li> </ul>	PAMSU/MTTI

Besides MTTI and its related projects, the Government's technical departments of environment should be co-opted, such as Ministry of Lands Water and Environment, National Forestry Authority, and Uganda Wildlife Education Centre. These not only represent management of public owned ecotourism sites, but also possess the capacity to influence the decision making processes and therefore the development of the sector.

The Uganda National Bureau of Standards (UNBS) was proposed for standards development and related issues. These shall be co-opted and consulted accordingly. Cleaner Production Centre of UNIDO also housed at the UNBS complex was also proposed as an active actor for enterprise development and improving efficiencies.

Social aspects such as culture shall in addition be addressed within the context of community activities. Of relevance therefore is the Ministry of Gender, Labour and Social Development.

#### ● The Private Sector

The private sector shall be the primary drivers in the implementation of the strategy owing to the following strengths:

- Central role to the promotion and marketing functions (both domestic and international), in light of their flexibility and ability to monitor and take advantage of opportunities in the market place

- Ability to influence the planning and development of attractions both in Protected Areas and on private land.
- Ability to relate easily with actors along the chain i.e Government, communities and between themselves. This is a strong factor in developing and strengthening the value chain
- Increased sector organisation as demonstrated by the presence of UTA

The strategy requires co-operation with sector associations such as UTA and tour operator associations and companies. It is, however, critical that only credible companies are selected and below are some of the criterion:

- i. Established and credible in the local market (association with UTA is an added advantage)
- ii. Already working with local partners
- iii. International contacts
- iv. Applying some knowledge of sustainability and respectability for the environment

#### ● **Development Partners**

Co-operation areas shall be defined jointly with running development projects such as UGSTDP, SCOPE, PAMSU for ecotourism development. NGOs shall be categorised among the development partners, and organisations such as SNV have demonstrated interest in supporting the sector.

Effort shall be made to compliment the current projects to avoid duplication of activities, and portray synergies for sustainable development.

#### ● **Communities**

Communities with running tourism projects based on biodiversity and those in areas with potential for development of ecotourism projects shall be considered. Areas for consideration should demonstrate richness in biodiversity on public or private lands.

It is crucial that partnerships and cooperation with other actors along the chain, i.e Protected Areas management, tour operators, NGOs such as Ngamba Islands, etc is maximised. Community associations such as UCOTA and COBATI shall be co-opted for strategy implementation.

## Annex 1: ECO-TOURISM VALUE CHAIN ANALYSIS (VCA) OUTCOMES - UGANDA

### 1. Accommodation and Food

Issues	Causes	Solutions	Possible Actors	Existing Actions
Training	<ul style="list-style-type: none"> <li>Limited skilled personnel</li> <li>Lack of exposure</li> <li>No standards currently</li> <li>Few facilities</li> </ul>	<ul style="list-style-type: none"> <li>Encourage private sector involvement</li> <li>Skill transfer</li> <li>Finalise curriculum &amp; implement it</li> <li>Encourage students</li> </ul>	<ul style="list-style-type: none"> <li>MTTI</li> <li>MES</li> <li>Development partners</li> <li>UHOA</li> <li>HCAU</li> </ul>	<ul style="list-style-type: none"> <li>HTTI in Jinja created in 1990, legalised in 1994 and in process of expanding</li> <li>Curriculum for tourism training developed with inputs from PAMSU and UGSTD and awaiting approval by MES</li> <li>PAMSU and UGSTD organised training once for some enterprises in enterprise management</li> </ul>
Limited quality facilities & quantity	<ul style="list-style-type: none"> <li>Poor investment incentives</li> <li>High cost of investment</li> <li>Limited market</li> <li>Poor infrastructure/ security</li> <li>Limited exposure</li> </ul>	<ul style="list-style-type: none"> <li>Enforce standards</li> <li>Create incentives</li> <li>Sensitise and build capacity</li> <li>Attract investors</li> </ul>	<ul style="list-style-type: none"> <li>MTTI</li> <li>URA</li> <li>UIA</li> <li>UHOA</li> <li>HCAU</li> </ul>	<ul style="list-style-type: none"> <li>Development of new camps in Kidepo National Park, Ishasha and Lake Mburo National Park</li> <li>Serena Hotel chain looking for concessions outside Kampala</li> </ul>
No grading system	<ul style="list-style-type: none"> <li>Limited funding</li> <li>Bureaucracy</li> <li>Limited market/ exposure</li> <li>Resource limitations</li> </ul>	<ul style="list-style-type: none"> <li>Finalise &amp; implement grading system</li> <li>Build capacity and sensitise stakeholders</li> <li>Strengthen regulatory capacity</li> </ul>	<ul style="list-style-type: none"> <li>MTTI/UTB</li> <li>MJCA</li> <li>UHOA</li> <li>HCAU</li> <li>Private sector</li> </ul>	<ul style="list-style-type: none"> <li>Standard criteria agreed upon by EAC</li> <li>Grading system developed in draft Bill but awaits approval of the Bill into Act</li> </ul>
Poor infrastructure	<ul style="list-style-type: none"> <li>Government priority</li> <li>Poor maintenance</li> <li>Insecurity</li> </ul>	<ul style="list-style-type: none"> <li>Lobby government</li> <li>Explore alternative energy resources and give incentives</li> <li>Lobby private sector</li> </ul>	<ul style="list-style-type: none"> <li>MTTI</li> <li>MWHC</li> <li>MUIENR</li> <li>UHOA</li> <li>HCAU</li> <li>Private sector</li> <li>Development partners</li> </ul>	<ul style="list-style-type: none"> <li>PAMSU and EU have supported road opening and maintenance in the national parks</li> <li>Road maintenance equipment procured for UWA by PAMSU and EU</li> <li>Local government maintaining feeder roads</li> </ul>
Access to affordable financing	<ul style="list-style-type: none"> <li>Poor development financing strategy</li> <li>Not a priority sector</li> </ul>	<ul style="list-style-type: none"> <li>Lobby for review</li> <li>Create awareness to policy makers and financiers</li> <li>Create levy and trust fund</li> <li>Venture capitalists</li> </ul>	<ul style="list-style-type: none"> <li>MTTI</li> <li>MFPED</li> <li>Financial Institutions</li> </ul>	
High cost of inputs	<ul style="list-style-type: none"> <li>Taxes</li> <li>Logistical constraints</li> <li>Low domestic industrial base</li> </ul>	<ul style="list-style-type: none"> <li>Tax incentives</li> <li>Regional co-operation</li> <li>Promote manufacturing</li> </ul>	<ul style="list-style-type: none"> <li>MFPED</li> <li>MTTI</li> <li>UMA</li> <li>URA/UIA</li> </ul>	<ul style="list-style-type: none"> <li>Initial discussion by PSFU and UTA was held with MFPED to address tax issues</li> </ul>
Limited market	<ul style="list-style-type: none"> <li>Focus on foreign market</li> <li>Limited awareness</li> <li>Poverty/low income</li> <li>Limited resources for marketing</li> </ul>	<ul style="list-style-type: none"> <li>Promote domestic tourism</li> <li>Channel more resources into marketing</li> <li>Training, capacity building</li> <li>Product development</li> </ul>	<ul style="list-style-type: none"> <li>UTB</li> <li>UWA</li> <li>UCOTA</li> <li>COBATI</li> <li>Tour operators</li> <li>Private sector</li> </ul>	
Unreliable supply of fresh foods	<ul style="list-style-type: none"> <li>Subsistence farming</li> <li>Storage</li> <li>Awareness</li> <li>Technical knowledge</li> </ul>	<ul style="list-style-type: none"> <li>Build capacity</li> <li>Create awareness</li> </ul>	<ul style="list-style-type: none"> <li>NAAD</li> <li>PMA</li> <li>NGOs</li> </ul>	

## 2. Transportation

Issues	Causes	Solutions	Possible Actors	Existing Actions
Cost/Pricing	<ul style="list-style-type: none"> <li>• High importation costs</li> <li>• Tourism is not zero rated: Duty 25%; VAT 18%; Withholding tax 6%</li> <li>• Fuel</li> <li>• Maintenance fee is high</li> <li>• Poor roads - on tourist routes</li> <li>• High loan costs - not security (26%)</li> <li>• Distance from a port</li> </ul>	<ul style="list-style-type: none"> <li>• Liaise with the tax policy unit</li> <li>• Tourism industry to be zero-rated</li> <li>• Negotiate on fuel</li> <li>• Use vehicles with alternative fuel e.g. natural gas/alcohol</li> <li>• Develop collective group services</li> <li>• Work smarter, Work together</li> <li>• Follow up on government promises to improve roads</li> <li>• Access to finance - loans</li> <li>• Negotiate better rates for loans</li> <li>• Access development finance (1-5%)</li> <li>• Reinstigate incentives for tour vehicles using existing players</li> <li>• Enhance the understanding of the industry</li> <li>• Create a pool of vehicles</li> </ul>	<ul style="list-style-type: none"> <li>• MFPED</li> <li>• MWHC</li> <li>• MTTI</li> <li>• AUTO creating group services e.g. mechanics/auto services, fuel company etc</li> <li>• Linkages with banks e.g. ADB/EADB</li> </ul>	<ul style="list-style-type: none"> <li>• Lobbying to MFPED spearheaded by PSFU and UTA</li> </ul>
Private Sector Development	<ul style="list-style-type: none"> <li>• Volunteerism</li> <li>• Fragmentation</li> <li>• Low payment levels</li> <li>• Conflict of interest</li> </ul>	<ul style="list-style-type: none"> <li>• Strengthening private sector by organising a paid secret</li> <li>• Discussions with employers/employees</li> <li>• Development of group services</li> <li>• Take over some licensing activities</li> </ul>	<ul style="list-style-type: none"> <li>• MTTI</li> <li>• Development partners</li> <li>• AUTO</li> </ul>	<ul style="list-style-type: none"> <li>• UGSTDP has in the past embarked on strengthening private sector organisations</li> </ul>
Training	<ul style="list-style-type: none"> <li>• Lack of available training programmes</li> <li>• Expensive training/trainers</li> <li>• Lack of Commitment/ motivation</li> <li>• Analysis of requirements</li> </ul>	<ul style="list-style-type: none"> <li>• Explore and adapt best case practices</li> <li>• Birding, general (flora/fauna) safari</li> <li>• 4 x4 off road</li> <li>• First Aid</li> <li>• Customer care</li> <li>• Mechanics (basic)</li> <li>• Fleet management</li> <li>• Boat drivers</li> <li>• Development of training manuals for private sector use</li> <li>• Costing vehicle/boat use</li> <li>• Recycle training</li> </ul>	<ul style="list-style-type: none"> <li>• Individual drivers</li> <li>• AUTO members</li> <li>• Bird guides association</li> <li>• Trainers</li> </ul>	
Taxation	<ul style="list-style-type: none"> <li>• Tourism is not zero rated: Duty 25%; VAT 18%; Withholding tax 6%</li> <li>• High fuel tax</li> <li>• Low level of incentives that lead to low level of investment</li> </ul>	<ul style="list-style-type: none"> <li>• Refer to cost/pricing solutions above</li> <li>• Create investment incentives</li> <li>• Offer special treatment to tourism</li> </ul>	<ul style="list-style-type: none"> <li>• MFPED</li> <li>• MWHC</li> <li>• MTTI</li> <li>• AUTO</li> </ul>	<ul style="list-style-type: none"> <li>• Efforts initiated under PSFU and UTA with MFPED to address taxes</li> </ul>

<b>Issues</b>	<b>Causes</b>	<b>Solutions</b>	<b>Possible Actors</b>	<b>Existing Actions</b>
Standards	<ul style="list-style-type: none"> <li>● No consistent application of standards</li> <li>● No standards for tourism vehicles</li> </ul>	<ul style="list-style-type: none"> <li>● Create a set of standards for tourism vehicles based on International criteria</li> </ul>	<ul style="list-style-type: none"> <li>● MTTI</li> <li>● MWHC</li> <li>● AUTO</li> </ul>	
Financing /Insurance	<ul style="list-style-type: none"> <li>● Lack of access to finance</li> <li>● High interest rates</li> <li>● Insurance cost high</li> <li>● Vehicles not security</li> <li>● Banks do not understand tourism</li> <li>● High cost of leasing</li> </ul>	<ul style="list-style-type: none"> <li>● Create a rapport with the banks and explain the sector</li> <li>● Negotiate low interest rates</li> <li>● Create group services</li> </ul>	<ul style="list-style-type: none"> <li>● MFPED</li> <li>● Bank Associations</li> <li>● AUTO</li> <li>● Insurance Associations</li> </ul>	<ul style="list-style-type: none"> <li>● Development trust proposed under the Bill awaiting approval by Parliament.</li> <li>● Portion of the funds to come from license fees</li> </ul>
Infrastructure	<ul style="list-style-type: none"> <li>● Tourism routes not a priority/not in the agenda</li> <li>● Government not fulfilling promises</li> <li>● Lack of maintenance</li> <li>● Sub-standard products for roads</li> <li>● Corruption</li> </ul>	<ul style="list-style-type: none"> <li>● Reduce corruption - support polices</li> <li>● Enhance advocacy activities to make tourism a priority</li> <li>● Hold Government accountable</li> </ul>	<ul style="list-style-type: none"> <li>● MWHC</li> <li>● MFPED</li> <li>● AUTO</li> <li>● Development partners</li> </ul>	<ul style="list-style-type: none"> <li>● PAMSU and EU been supporting road opening and maintenance in the national parks</li> <li>● Local governments been maintaining feeder roads</li> </ul>
Community	<ul style="list-style-type: none"> <li>● Lack of training on transportation repair</li> </ul>	<ul style="list-style-type: none"> <li>● Offer training on vehicle repair/ maintenance</li> </ul>	<ul style="list-style-type: none"> <li>● UCOTA</li> <li>● Mechanic training Institutes</li> </ul>	
Air Transport	<ul style="list-style-type: none"> <li>● Monopoly of carrier within Africa</li> <li>● Not enough seats available as we share with Kenya (Nairobi)</li> <li>● High fuel prices</li> <li>● Security fees and fuel surcharges</li> <li>● Landing fees</li> <li>● ENHAS services too high</li> <li>● High visa fees US \$ 30</li> <li>● High airport departure fees US \$ 40</li> <li>● Airport infrastructure inadequate</li> <li>● Not enough domestic aircraft</li> </ul>	<ul style="list-style-type: none"> <li>● Encourage additional seat to Uganda</li> <li>● Evaluate fees</li> <li>● Provide better services</li> <li>● Decrease airport departure tax</li> <li>● Leasing of aircraft</li> <li>● Aviation training</li> </ul>	<ul style="list-style-type: none"> <li>● BAR</li> <li>● CAA</li> <li>● MWHC</li> <li>● MTTI</li> <li>● Private Sector</li> <li>● Aviation schools</li> </ul>	<ul style="list-style-type: none"> <li>● KLM offered 660 new seats per week starting November 1st, 2005</li> <li>● Kenya Airways has also increased on the number of seats</li> </ul>

### 3. Tour Operators

Issues	Causes	Solutions	Possible Actors	Existing Actions
Travel advisory services	<ul style="list-style-type: none"> <li>● Health: disease/ epidemics</li> </ul>	<ul style="list-style-type: none"> <li>● Dialogue</li> <li>● Communication/marketing</li> <li>● Peaceful negotiation</li> </ul>	<ul style="list-style-type: none"> <li>● Government</li> <li>● Private sector</li> <li>● Embassies</li> <li>● NGOs</li> </ul>	
Image and Insecurity	<ul style="list-style-type: none"> <li>● Lack of up-to-date information/ Misinformation</li> </ul>	<ul style="list-style-type: none"> <li>● Lobbying</li> <li>● Improve security</li> </ul>	<ul style="list-style-type: none"> <li>● UTB</li> <li>● Private sector</li> <li>● Media</li> <li>● Government</li> <li>● Communities</li> <li>● Warring factions</li> </ul>	<ul style="list-style-type: none"> <li>● UGSTDP been helping to rehabilitate image on international scene</li> <li>● UTB shares information through its website, visituganda.com</li> <li>● Sharing information through MTTI through its website www.mtti-tourism.co.ug</li> </ul>
Pricing /Taxation	<ul style="list-style-type: none"> <li>● Government policy</li> <li>● Market forces</li> </ul>	<ul style="list-style-type: none"> <li>● Training and capacity building</li> </ul>	<ul style="list-style-type: none"> <li>● Private sector/ Government (tourism committee)</li> </ul>	
Marketing	<ul style="list-style-type: none"> <li>● Lack of maturity in the industry</li> </ul>	<ul style="list-style-type: none"> <li>● Create a trust fund levy</li> </ul>	<ul style="list-style-type: none"> <li>● MTTI+UTB</li> <li>● UWA</li> <li>● Private sector</li> <li>● Donors</li> </ul>	<ul style="list-style-type: none"> <li>● Companies using the UTB website www.visituganda.com</li> <li>● Some companies are using their own websites</li> </ul>
Sector players interaction	<ul style="list-style-type: none"> <li>● Lack of commitment by public and private sector</li> </ul>	<ul style="list-style-type: none"> <li>● Create awareness</li> <li>● Raise priority</li> </ul>	<ul style="list-style-type: none"> <li>● MTTI</li> <li>● MFPED</li> <li>● UTB</li> <li>● PSFU</li> </ul>	
Poor representation at EAC	<ul style="list-style-type: none"> <li>● Lack of knowledge</li> </ul>	<ul style="list-style-type: none"> <li>● Re-focus investment policy to tourism</li> </ul>	<ul style="list-style-type: none"> <li>Government</li> <li>● UIA</li> <li>● Private sector</li> </ul>	
Advocacy	<ul style="list-style-type: none"> <li>● Lack of skills to advocate</li> </ul>	<ul style="list-style-type: none"> <li>● Train in advocacy</li> </ul>	<ul style="list-style-type: none"> <li>● MTTI + UTB</li> <li>● Private Sector</li> </ul>	
Infrastructure	<ul style="list-style-type: none"> <li>● Lack of resources</li> <li>● Poor planning and resource allocation</li> </ul>		<ul style="list-style-type: none"> <li>● Government</li> <li>● Donors</li> </ul>	
Standards				
Product development	<ul style="list-style-type: none"> <li>● Lack of a data base</li> </ul>	<ul style="list-style-type: none"> <li>● Product research and advice</li> </ul>	<ul style="list-style-type: none"> <li>● Government</li> <li>● Private sector</li> <li>● UIA</li> </ul>	
Licensing	<ul style="list-style-type: none"> <li>● Lack of monitoring</li> </ul>	<ul style="list-style-type: none"> <li>● Licensing, regulation</li> </ul>	<ul style="list-style-type: none"> <li>MTTI + UTB</li> <li>● Private Sector</li> </ul>	
Implementation	<ul style="list-style-type: none"> <li>● Lack of commitment</li> <li>● Government/Private sector</li> </ul>	<ul style="list-style-type: none"> <li>● Create awareness</li> <li>● Raise priority</li> </ul>	<ul style="list-style-type: none"> <li>● Media</li> <li>● Private sector</li> </ul>	

#### 4. Attractions and Activities

Issues	Causes	Solutions	Possible Actors	Existing Actions
Travel advisory	<ul style="list-style-type: none"> <li>● Insecurity</li> <li>● Natural disasters</li> <li>● Political Intrigue</li> </ul>	<ul style="list-style-type: none"> <li>● Timely removal of advisories</li> <li>● Disaster preparedness &amp; management plans</li> </ul>	<ul style="list-style-type: none"> <li>● Prime minister's office</li> <li>● Development partners</li> <li>● Dialogue</li> </ul>	
Image	<ul style="list-style-type: none"> <li>● Insecurity</li> <li>● Limited knowledge</li> <li>● One commodity destination (Mountain Gorilla)</li> </ul>	<ul style="list-style-type: none"> <li>● Remove insecurity</li> <li>● Advertise/publish</li> <li>● Diversify product range</li> <li>● Use Internet/media</li> </ul>	<ul style="list-style-type: none"> <li>● Central government</li> <li>● MTTI</li> <li>● UTB</li> </ul>	<ul style="list-style-type: none"> <li>● Information placed on UWA, UTB websites and once on CNN</li> <li>● UGSTDP has been helping with the rehabilitation of the image in International market</li> </ul>
Infrastructure	<ul style="list-style-type: none"> <li>● Poor infrastructure development</li> </ul>	<ul style="list-style-type: none"> <li>● Have better road, air, accommodation, communication facilities</li> </ul>	<ul style="list-style-type: none"> <li>● MWHC</li> <li>● UWA</li> <li>● District local governments</li> <li>● Communities</li> </ul>	<ul style="list-style-type: none"> <li>● PAMSU and EU have been supporting road opening and maintenance in the protected areas</li> <li>● Feeder roads been to these attractions been maintained by local governments</li> </ul>
Implementation of planned attractions	<ul style="list-style-type: none"> <li>● Lack of resources</li> <li>● Lack of skilled personnel</li> <li>● Interdepartmental wrangles</li> </ul>	<ul style="list-style-type: none"> <li>● Prioritisation of resource funding</li> <li>● Training</li> <li>● Harmonise departmental roles</li> </ul>	<ul style="list-style-type: none"> <li>● Development partners</li> <li>● NGOs/CBOs</li> <li>● Central &amp; local governments</li> <li>● Communities</li> </ul>	<ul style="list-style-type: none"> <li>● PAMSU and EU supported UWA to develop guidelines and offer concessions that are beneficial</li> <li>● UWA has made arrangements to do this through concessions to the private sector</li> </ul>
Product development	<ul style="list-style-type: none"> <li>● Lack of diversification</li> <li>● Over reliance on traditional attractions</li> <li>● Lack of research on alternatives</li> </ul>	<ul style="list-style-type: none"> <li>● Diversify</li> <li>● Encourage research into demand driven alternatives</li> </ul>	<ul style="list-style-type: none"> <li>● UWA</li> <li>● NEMA</li> <li>● MUIENR</li> <li>● UIE</li> <li>● MUBFS</li> <li>● ITFC</li> <li>● NARO</li> </ul>	
Community involvement	<ul style="list-style-type: none"> <li>● Lack of awareness of value</li> <li>● Lack of empowerment</li> <li>● Traditional beliefs &amp; culture</li> </ul>	<ul style="list-style-type: none"> <li>● Sensitisation</li> <li>● Awareness creation</li> <li>● Empowerment</li> <li>● Equitable sharing of benefits</li> </ul>	<ul style="list-style-type: none"> <li>● UWA</li> <li>● District local governments</li> <li>● Private investors</li> <li>● Central government</li> <li>● CBOs/CPAIs</li> </ul>	<ul style="list-style-type: none"> <li>● Strategy for community empowerment has been developed from collaborations between SNV, UCOTA and UGSTDP</li> </ul>
Private sector development	<ul style="list-style-type: none"> <li>● Low return on investments</li> <li>● Lack of clear guidelines</li> <li>● Cumbersome procedures</li> </ul>	<ul style="list-style-type: none"> <li>● Clear guidelines</li> <li>● Simplified procedures</li> <li>● Attractive financing</li> </ul>	<ul style="list-style-type: none"> <li>● NEMA</li> <li>● MTTI</li> <li>● UWA</li> <li>● PSFU</li> </ul>	<ul style="list-style-type: none"> <li>● UGSTDP has been supporting strengthening of UTA, AUTO, BAR, Bird Guides Association</li> </ul>

<b>Issues</b>	<b>Causes</b>	<b>Solutions</b>	<b>Possible Actors</b>	<b>Existing Actions</b>
Standards	<ul style="list-style-type: none"> <li>● Absence of standards for accommodation, solid waste disposal etc</li> <li>● Lack of zoning</li> <li>● Institutional ambiguity (Government/districts/Local councils)</li> </ul>	<ul style="list-style-type: none"> <li>● Develop standards</li> <li>● Enforcement of existing standards</li> <li>● Zoning</li> </ul>	<ul style="list-style-type: none"> <li>● UWA</li> <li>● NEMA</li> <li>● PSF</li> <li>● MTTI</li> <li>● Town &amp; Country planning boards</li> <li>● Local governments through by laws and ordinances</li> </ul>	<ul style="list-style-type: none"> <li>● Criteria for standard already developed in the draft Bill awaiting approval by Parliament</li> </ul>
Training	<ul style="list-style-type: none"> <li>● Inadequate training for tour guides/hospitality industry /interpretation/product knowledge</li> <li>● Financial limitation</li> </ul>	<ul style="list-style-type: none"> <li>● Training of entrepreneurs</li> <li>● Training of trainers</li> <li>● Refresher courses</li> <li>● Training be financed</li> <li>● Appropriate remuneration</li> </ul>	<ul style="list-style-type: none"> <li>● UWTI</li> <li>● UHTI - Jinja</li> <li>● MUBFS</li> <li>● ITFC</li> <li>● Licensed private training institutions</li> <li>● NGOs</li> </ul>	<ul style="list-style-type: none"> <li>● Initial training for enterprises was undertaken by PAMSU and UGSTDP-</li> <li>● Curriculum for tourism sector developed based on that for HTTI and is awaiting approval by MES</li> </ul>
Financing	<ul style="list-style-type: none"> <li>● Low priority in government budget allocation</li> <li>● Lack of support to districts</li> <li>● Low in priority for government and so for development partners</li> </ul>	<ul style="list-style-type: none"> <li>● Prioritised in government budget</li> <li>● Active environment and natural resource sector in sector wide action plan</li> </ul>	<ul style="list-style-type: none"> <li>● MFPED</li> <li>● MWLE</li> <li>● MAAIF</li> <li>● MTTI</li> <li>● Local Governments</li> <li>● Development partners</li> <li>● International NGOs</li> </ul>	
Taxation	<ul style="list-style-type: none"> <li>● Over taxation e.g. VAT</li> <li>● Prioritisation</li> </ul>	<ul style="list-style-type: none"> <li>● Review tax regulation on sector</li> </ul>	<ul style="list-style-type: none"> <li>● MFPED</li> <li>● URA</li> <li>● Parliament</li> </ul>	<ul style="list-style-type: none"> <li>● Initial effort made by PSFU and AUTO to MFPED for the whole tourism sector</li> </ul>
Pricing	<ul style="list-style-type: none"> <li>● Not reflective on total costs</li> <li>● Monopolistic position</li> <li>● No regulatory authority</li> <li>● Unrealistic price expectation</li> </ul>	<ul style="list-style-type: none"> <li>● Price regulation</li> <li>● Encourage more entrants to stimulate competition</li> </ul>	<ul style="list-style-type: none"> <li>● UTB</li> <li>● MTTI</li> <li>● UWA</li> <li>● UEPB</li> <li>● UCOTA</li> </ul>	
Marketing	<ul style="list-style-type: none"> <li>● Not targeting right markets</li> <li>● Under funding</li> <li>● Lack of aggressive marketing</li> </ul>	<ul style="list-style-type: none"> <li>● Target marketing</li> <li>● Diversified range of products-</li> <li>● Appropriate packaging/branding</li> </ul>	<ul style="list-style-type: none"> <li>● UTB</li> <li>● MTTI</li> <li>● UEPB</li> <li>● AUTO</li> </ul>	<ul style="list-style-type: none"> <li>● UGSTDP developed marketing strategy for sector from 2004 to 2008</li> <li>● PAMSU helped districts of Kanungu, Kisoro, Kasese, Kabarole that are adjacent to protected areas develop district tourism plans. Target is 10 districts</li> </ul>

## **ANNEX 2: GENERAL RECOMMENDATIONS RESULTING FROM THE ECOTOURISM ASSESSMENT STUDY**

1. Need to develop an ecotourism policy and strategic plan and then form a national ecotourism society with the guidance of The International Ecotourism Society to encourage and properly develop ecotourism opportunities.
2. Need to inventory and develop the attractions outside the protected areas.
3. Urgent need to carry out an analysis of the prices the providers of ecotourism attractions charge.
4. Need to carry out a comprehensive analysis of the profitability of ecotourism and ensure that the prices the private operators charge do not include significant amounts of windfall profits which would impair the international and regional competitiveness of Uganda's ecotourism industry.
5. Need to promote community-based ecotourism, including the ability of communities to become lessors of ecotourism attractions and as joint venture partners with the private sector in ecotourism businesses.
6. Need to put in place additional standards and certifications to help guide the development of the ecotourism industry in Uganda.
7. Need to develop a better characterisation of the ecotourism market and to align the market features to the preferences of visitors. Equally important is the issue of ecotourism branding.
8. Need to profile the characteristics of the ecotourism visitors coming to Uganda. This will help in designing the right products for the visitors.
9. As a means of market diversification, the promotion of the operationalisation of the wildlife use rights provided for in the Wildlife Act, particularly wildlife farming and ranching, could lead to the diversification of ecotourism products.
10. The tax regime for the ecotourism regime has been flagged as an important issue by private operators. The reasons advanced to have ecotourism zero-rated however, are not evidence-based. There is, therefore, a need to carry out a study on the efficiency of the existing taxation regime.
11. No comprehensive analysis of the economic impact of ecotourism in Uganda. Yet, such an analysis would be extremely informative for the purposes of informed policy making. Using macroeconomic models such as the Social Accounting Matrix (SAM) the economic significance of ecotourism in Uganda can and should be estimated.
12. The ecotourism industry if well planned can enhance the realisation of domestic value. Otherwise industry characteristics indicate potential for loss of value through leakages. How much leakage there is in the present Ugandan ecotourism industry is unknown. There is, therefore, a need to carry out an analysis of the pattern and magnitude of leakages so as to take efficient corrective measures.