



**AFRICA INSTITUTE FOR ENERGY
GOVERNANCE**

RESEARCH BRIEF

“THOSE OIL LIARS! THEY DESTROYED MY BUSINESS!”

Tourism stakeholders' views of Uganda's oil sector



JULY 2025

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EXECUTIVE SUMMARY

Between February and July 2025, Africa Institute for Energy Governance (AFIEGO) conducted community based research to assess the perceptions and attitudes that Ugandan tourism sector stakeholders have towards Uganda's oil and gas industry. Do tourism sector stakeholders believe that the oil industry presents challenges to their livelihoods? If yes, in what way?

What benefits do tourism sector stakeholders believe are conferred by the oil industry on tourism, if any?

Further, what impact has Uganda's oil and gas industry had on micro and small businesses in the tourism sector especially enterprises in oil host districts?

Uganda Investment Authority (UIA) defines a micro business is "an enterprise employing up to four people, with an annual sales/revenue turnover or total assets not exceeding Uganda shillings 10 million". UIA defines small enterprises as businesses that "employ between 5 and 49 [people] and have total assets between UGX 10 million but not exceeding UGX 100 million".

Tourism sector stakeholders are people that work across the tourism value chain. In Uganda's Satellite Tourism Account of 2023, the Uganda Bureau of Statistics (UBOS) identifies these as including tour operators, transport providers, drivers, tour guides, accommodation providers as well as food and beverage service providers. The Centre for Promotion of Imports (2020) also identifies attraction and activity providers as tourism sector stakeholders.

Rationale for research brief

This community based research brief has been produced because tourism is one of the most important economic sectors in Uganda. The sector is one of Uganda's major foreign exchange earners, and makes substantial contributions to the country's Gross Domestic Product (GDP) while offering employment.

Available information shows that in 2024 for instance, the tourism sector earned Uganda UGX 4.8 trillion (approximately USD 1.28 billion), contributing 16% of Uganda's total exports (Ministry of Tourism, Wildlife and Antiquities [MTWA], 2025).

Further, the sector's direct contribution to GDP was 3.2% and employment amounted to 803,000 jobs, approximately 7.2% of total employment in 2024 (MTWA, 2024).

The Government of Uganda (GoU) has big plans for the sector, with the industry being one of the seven priority areas that have been identified under the National Development Plan (NDP) IV to drive a tenfold economic growth by 2029/2030 (Parliament Watch, 2025). The GoU hopes to increase foreign exchange earnings from tourism from USD 1.0 billion in FY2023/2024 to USD 10.0 billion by FY 2029/2030.

Enter oil activities

While the tourism sector which covers nature-based, cultural, religious, dark and other forms of tourism in Uganda is incredibly important, the sector is faced with challenges. Among these is the fact that while nature-based tourism is one of Uganda's most important forms of tourism, oil and gas activities, are ongoing in protected areas.

Worth noting is that nature-based tourism involves "responsible travel to natural areas" (The International Ecotourism Society, Undated).

Murchison Falls National Park (NP) and Queen Elizabeth NP, the two parks that led in visitor numbers between 2020 to 2024 (MTWA, 2025), are subject to oil exploitation activities or threats. Oil exploitation is ongoing in Murchison Falls NP (Totalenergies, 2019), with commercial oil production expected to start from the park by June 2026 (The Independent, 2025).

Further, the GoU has sought to issue an oil exploration license for an oil block covering Queen Elizabeth NP and Lake Edward since 2015 (Musisi, 2016).

Experience from oil producing countries such as Nigeria shows that oil exploitation activities in ecosensitive areas can negatively impact tourism (Anyanwu and Okoroji, 2021). This puts the livelihoods of tourism sector stakeholders at risk. Despite this, the stakeholders in Uganda have engaged in limited efforts to address the risks posed by the oil and gas industry to their livelihoods. Why is this the case? This research brief sought to understand this phenomenon.

Worth noting is that previously, tourism sector stakeholders engaged in campaigns such as Save Murchison Falls from a hydropower dam in 2019 (Murchison Falls National Park, Undated) as well as Save Bugoma Forest Campaign 2020, a campaign aimed at protecting Bugoma forest from oil, land grabbing and sugarcane growing challenges. The campaigns were key to protecting the livelihoods of tourism sector stakeholders.

Purpose of research brief

To assess the perceptions and attitudes of tourism sector stakeholders towards Uganda's oil and gas industry to enhance public awareness on the same, this community based research brief has been produced. The brief documents the following:

- (i) The attitudes that stakeholders in the tourism and travel industry have towards conservation vis-à-vis oil and gas exploitation;
- (ii) The key threats to the tour and travel industry as identified by tourism sector stakeholders;
- (iii) Tourism sector stakeholders' views on the perceived benefits and challenges of Uganda's oil and gas industry; and
- (iv) The impact of Uganda's oil and gas industry on select micro and small tourism sector businesses in oil host districts.

Methodology

This research brief employed a cross-sectional research design and a mixed methods research approach. The research was conceptualised between February and March 2025. Data was collected between April and June 2025 with desktop research, Focus Group Discussions (FGDs) and a structured questionnaire being used to collect data. A total of 66 tourism sector stakeholders participated in the study. These include tour operators, tour guides, travel agents, drivers, hotel workers as well as food and beverage service providers. The data was analysed and this research brief was written and validated between June and July 2025.

Key findings

As earlier indicated, this research brief sought to assess the attitudes that tourism sector stakeholders in Uganda have towards biodiversity conservation. The assessment found that the majority of tourism sector stakeholders that participated in this study are of the view that biodiversity conservation must be prioritised to protect their livelihoods. Of the respondents that participated in the study, 98.1% perceive conservation as very important for their livelihoods, while 1.9% consider it moderately important.

This community based research sought to understand why if the majority of the respondents that participated in this study consider conservation critical for their livelihoods, limited action was being undertaken to address oil risks. The study therefore asked the research participants to identify the key threats to their livelihoods. The following threats were identified: biodiversity destruction which was identified by 22.5% of the respondents, underfunding of tourism by government, which was identified by 17.4% of the respondents, and climate change, which was identified by 16.9% of the respondents.

Some of the other risks that were identified include oil and gas activities, which was identified by 13.5% of the respondents and development of roads in protected areas, which was identified by 8.4% of the respondents.

It could be surmised that tourism sector stakeholders are engaged in limited efforts to address oil risks to their livelihoods as only 13.5% consider oil and gas exploitation a risk to their livelihoods.

Worth noting however is that the oil and gas industry in Uganda remains a big threat to biodiversity conservation (TotalEnergies, 2019). Moreover, the burning of fossil fuels including coal, oil and gas remains the biggest driver of climate change (United Nations, Undated). Furthermore, the oil and gas sector has led to development of infrastructure such as roads, pipelines and others in protected areas including Murchison Falls NP in Uganda (AFIEGO, 2024). If the above oil and gas risks or impacts are combined, then the sector accounts for 61.3% of the key risks that this study's respondents say are faced by the tourism sector.

This study also sought to understand the challenges posed by the oil industry to Uganda's tourism sector as identified by the sector's stakeholders. Risks including construction of oil infrastructure such as roads and pipelines in protected areas, biodiversity destruction, increased poaching and increased demand for accommodation, leading to higher costs for tourists were identified by the tourism sector stakeholders. The construction of oil infrastructure such as roads and pipelines in protected areas was identified as the biggest risk posed by the oil and gas industry to the tourism sector.

The GoU and oil companies operating in the country argue that the oil and gas industry has had a positive impact on the economy, including on local people. They note that in 2024 alone, "5,280 procurements worth US\$ 5.3 billion [were] made, of which 4,511 procurements valued at US\$ 2.1 billion (40%) were awarded to Ugandan companies. Community-based companies received contracts worth US\$ 19 million" (Ssekatawa, 2024).

They also note that by November 30, 2024, "15,169 people were directly employed in the [oil and gas] sector, 90% of whom are Ugandans. This includes 4,773 workers from host communities. Additionally, direct employment has resulted in 34,889 indirect jobs and 100,115 induced jobs" (Ssekatawa, 2024).

Did micro and small businesses in the tourism industry benefit from the above reported investments and jobs? What impact has the oil and gas industry had on micro and small businesses in the tourism sub-sector in Buliisa and Kyotera districts, this community based research asked?

This study found that despite the above-reported economic impact of the oil and gas industry, micro and small business owners in the tourism sector in Buliisa and Kyotera district were struggling, despite oil activities taking place in these districts. During FGDs, the aforementioned stakeholders observed that they had accrued limited to no benefits from the oil and gas industry.

In some instances, moreover, the sector had negatively impacted businesses in the districts, especially in Buliisa. The tourism sector stakeholders that participated in this study observed that compulsory land acquisitions, oil-induced increases in commodity prices, and increased competition had negatively impacted their businesses.

Further, the participants reported that false promises of oil prosperity saw some tourism sector stakeholders diverting their investments to tap into the oil industry, leading to losses. This led to one FGD participant calling GoU officials and oil industry players who promised oil prosperity that did not materialise as “Oil liars who led me to business distress.”

Despite the above, some respondents who participated in this research were hopeful that they could enjoy benefits such as oil-driven improved infrastructural developments that ease business, creating partnerships with the oil industry to promote tourism, and an increase in demand for travel services.

Recommendations

This study’s respondents affirmed that “tourism depends on intact ecosystems. Protecting national parks and biodiversity hotspots is non-negotiable”. Some of the research participants recommend that government and oil companies should not drill for oil in protected areas.

Others recommend enforcement of Environmental Impact Assessments (EIAs), buffer zones, and no-drill areas in or near national parks like Murchison Falls and Queen Elizabeth.

Yet others recommend that the GoU increases funding for the sector, while reducing taxes for enterprises in the tourism industry.



Some of the biodiversity in Murchison Falls NP that attracts tourists; this biodiversity is at risk due to oil activities in the park.

1. INTRODUCTION AND BACKGROUND

The tourism sector in Uganda is incredibly important, generating significant revenue and creating employment. In 2024 for instance, Uganda welcomed 1,371,895 international visitors (Ministry of Tourism, Wildlife and Antiquities [MTWA], 2025), recovering to 89.2% of pre-pandemic levels.

Further, international tourism receipts grew to UGX 4.8 trillion (approximately USD 1.28 billion), up from USD 1.025 billion in 2023, contributing 16% of Uganda's total exports (MTWA, 2025).

Leisure tourism saw an increase, with its share rising from 16% to 19%. Additionally, domestic tourism participation grew by 5.2%, with 2.8 million Ugandans exploring the country's national parks, cultural sites, and other key attractions (MTWA, 2025).

In 2024, the tourism sector's direct contribution to GDP was UGX 6.06 trillion (3.2%) and employment amounted to 803,000 jobs, approximately 7.2% of total employment (MTWA, 2024).

Moreover, tourism investments grew by UGX 7.5 billion (approximately USD 2.1 million), which accounted for 17.2% of the national total.

In addition, according to Uganda's National Development Plan (NDP) IV which was launched by President Yoweri Kaguta Museveni in June 2025 (Parliament of Uganda, 2025), tourism is one of seven priority areas that will be invested in to drive a tenfold growth by 2029/2030 (Parliament Watch, 2025).

Through implementing interventions in the NDP IV, the Government of Uganda (GoU) is seeking to grow Uganda's economy from USD 52.2 billion to USD 158 billion by 2029/2030 (Parliament Watch, 2025). The GoU hopes to increase foreign exchange earnings from tourism from USD 1.0 billion in FY2023/2024 to USD 10.0 billion by FY 2029/2030.

2. PROBLEM STATEMENT

As demonstrated above, tourism is an important economic activity in Uganda. More so, eco-tourism or nature-based tourism that involves "responsible travel to natural areas" (The International Ecotourism Society, Undated) is an important form of tourism in Uganda. Of tourist attractions including national parks, game reserves, wildlife education centers, as well as museums and other cultural sites in the country, national parks, games reserves and wildlife education centres remain some of the most visited (MTWA, Undated).

In particular, Murchison Falls National Park (NP) and Queen Elizabeth NP remain the most visited tourist sites in Uganda, with available information from the MTWA showing that Murchison Falls NP led in visitor numbers between 2020 to 2024 (MTWA, 2025).

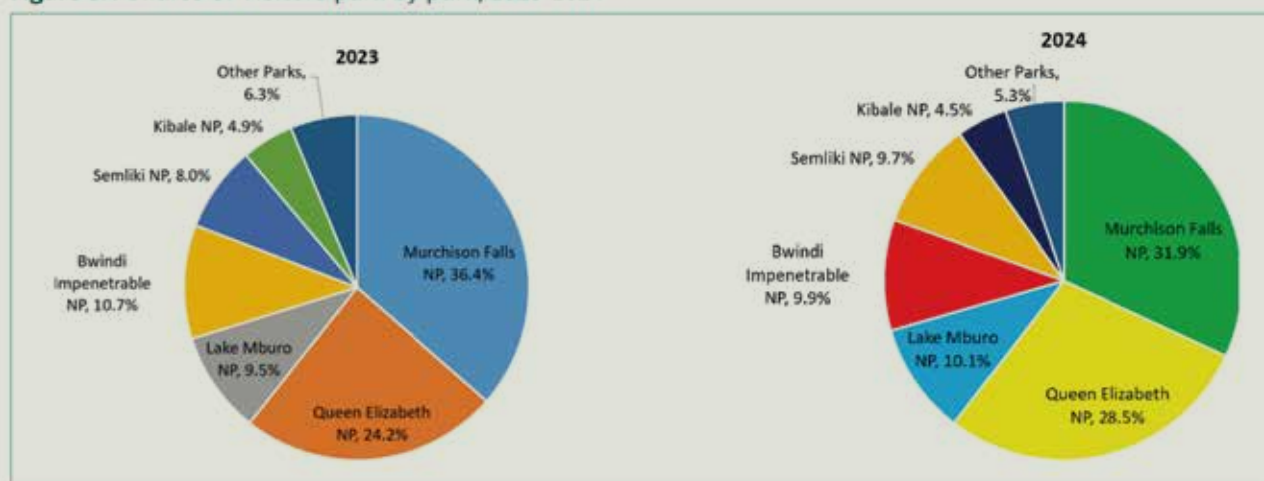
Indeed, in 2024, Murchison Falls NP accounted for 32% of all visitors to national parks, followed by Queen Elizabeth at 29%, Lake Mburo at 10.1%, and Bwindi Impenetrable NP at 9.9% (MTWA, 2025). The above are Uganda's top four parks (MTWA, 2025).

Murchison Falls NP is one of Uganda's top national parks due to its diverse wildlife and iconic waterfall, which is considered the most powerful in the world (Global Conservation, Undated).

Below is a figure that shows visitors to Uganda's national parks between 2023 and 2024.

Figure 1: Visitors to Uganda's national parks in 2023 and 2024

Figure 57: Shares of Visitors park by park, 2023-2024



Source: UWA admin data 2024

Source: MTWA Statistical Abstract 2025; Published in March 2025

While Murchison Falls and Queen Elizabeth national are important tourism sites, they are under pressure from oil exploitation activities. Efforts to extract oil from Murchison Falls NP are underway with infrastructure such as oil rigs, wellpads, flowlines, pipelines and others being developed in the park (AFIEGO, 2024). It is hoped that oil produced from the park will be exported from Uganda beginning in June 2026 (Uganda Radio Network, 2025).

Further, since 2015, the GoU has sought to license oil exploration efforts covering Queen Elizabeth NP (Musisi, 2016). Ngaji oil block, which covers Queen Elizabeth NP and Lake Edward, was put up for oil exploration licensing in 2015. Civil society pressure staved off interest in the block, leading to no company applying for a license for the block.

However, the block was also put up for oil exploration licensing in 2019 (The Independent, 2019) but no company bided for the oil block (Daily Monitor, 2021). Another exploration licensing round is due in 2025 and Ngaji oil block could be put up for licensing as since 2021, government has mulled over re-putting Ngaji oil block up for oil exploration licensing (Musisi, 2021).

Oil exploitation has negative impacts on biodiversity conservation efforts, which puts the tourism sector at risk. If ecotourism sites are degraded, Uganda's tourism earnings and employment in the sector could suffer.

While the above is true, tourism sector stakeholders in Uganda are taking limited action to address the threats presented by oil exploitation activities on their livelihoods. Previously, these stakeholders were involved in campaigns such as Save Murchison Falls (New Vision, 2020) and Save Bugoma Forest Campaign 2020 (Association for Conservation of Bugoma Forest, Undated) to defend their livelihoods from threats posed by a hydropower dam at the Murchison Falls as well as sugarcane growing in Bugoma Central Forest Reserve (CFR).

There is limited empirical evidence to support the public to understand why tourism sector stakeholders are engaged in limited efforts to address the threat of oil exploitation in national parks to their livelihoods.

Further, limited empirical information on the impacts of the oil and gas industry on micro and small businesses in the tourism industry in oil host districts exists. A micro business is “an enterprise employing up to four people, with an annual sales/revenue turnover or total assets not exceeding Uganda shillings 10 million. On the other hand, small enterprises employ between 5 and 49 [people] and have total assets between UGX 10 million but not exceeding UGX 100 million” (Uganda Investment Authority, Undated).

While the above is the case, oil and gas players assert that their activities have had a positive impact on Uganda’s economy (Businge, 2024), including on local businesses (Businge, 2024). To enhance public awareness on tourism stakeholders’ perceptions and attitudes towards Uganda’s oil sector, as well the impact of the oil and gas industry on micro and small enterprises in the tourism industry in oil host districts, this community based research brief has been produced.

3. OBJECTIVES

a. Main objective

The general objective of this research brief therefore is: To assess tourism sector stakeholders’ perceptions and attitudes towards Uganda’s oil sector while analysing the impact of the oil and gas industry on micro and small businesses in the tourism sector in oil host districts.

b. Specific objectives

The specific objectives of the research brief are:

- (v) To assess the attitudes that stakeholders in the tourism industry have towards conservation vis-à-vis oil and gas exploitation;
- (vi) To evaluate the key threats to the tour and travel industry as identified by tourism sector stakeholders;
- (vii) To document tourism sector stakeholders’ views on the perceived benefits and challenges of Uganda’s oil and gas industry; and
- (viii) To analyse the impact of Uganda’s oil and gas industry on select micro and small tourism sector businesses in oil host districts.

4. KEY STAKEHOLDERS: UGANDA’S TOURISM VALUE CHAIN

To assess the above objectives, it is important to understand who the key stakeholders in Uganda’s tourism value chain are. In Uganda’s Tourism Satellite Account of 2023, the Uganda Bureau of Statistics (UBOS) notes that the tourism sector covers some of the following services in Uganda: transportation, accommodation, food and beverages, recreation and entertainment, and travel agencies.

The report, “Analysis of the Tourism Value Chain in Uganda”, that was produced for the Dutch Ministry of Foreign Affairs in 2020, identifies the types of people that work in Uganda’s tour and travel industry as being: tour operators who own and operate tour and travel businesses, transport providers, drivers and tour guides who provide driving and guiding services say in national parks, and accommodation providers who may be hotel owners, AirBnB service providers and others.

Others include food and beverage providers as well as attraction and activity providers who organise activities such as cycling events. Financial service providers also play a key role in Uganda’s tourism industry.

Below is a table that discusses key public and private sector players in Uganda's tourism sector.

Table 1: Tourism stakeholders and the roles they play

Stakeholder	Responsibility
Ministry of Tourism, Wildlife and Antiquities (MTWA)	A government body that is responsible for developing policies, promoting Uganda as a destination, and managing tourism-related resources.
Uganda Wildlife Authority (UWA)	A government agency that manages national parks and wildlife reserves, providing crucial tourism products and services, and wielding considerable power in conservation efforts
Uganda Tourism Board (UTB)	A government agency that promotes and markets Uganda as a tourism destination, works with other stakeholders to develop tourism products, and provides information to potential tourists
Other Ministries (e.g., Finance, Works & Transport, etc)	Government bodies that influence tourism through policies related to infrastructure e.g Uganda Airlines, financing, and other aspects that support the tourism industry
Tour Operators, Drivers and Tour Guides	Private sector players who organise tour and travel packages, directly engaging with tourists and influencing their experiences and perceptions. These players also provide expertise and knowledge about Uganda's natural and cultural attractions.
Hotels and lodges	Private sector players who provide accommodation and amenities, impacting tourist satisfaction and influencing the overall tourism experience
Restaurants and Businesses	Offer food, beverages, and other services to tourists
Local Communities	Benefit directly from tourism through employment, income generation, and access to services. They also have a significant impact on tourism through their cultural practices, traditions, and their ability to support or hinder tourism development.
Traditional Leaders	Often have significant influence within their communities and can play a role in tourism planning and decision-making
International Development Agencies (for example World Bank)	Provide funding, technical expertise, and research on tourism development
NGOs and Foundations	Support community-based tourism, conservation efforts, and other initiatives that benefit the tourism sector
Educational institutions and research bodies	Conduct research on tourism, provide training for tourism professionals, and contribute to the development of knowledge about tourism in Uganda
Civil Society Organisations	Monitor tourism-related issues, advocate for sustainable tourism practices, and provide support to local communities

5. METHODOLOGY

To assess tourism sector stakeholders' perceptions and attitudes towards Uganda's oil sector while analysing the impact of the oil and gas industry on micro and small businesses in oil host districts, this research brief employed a cross-sectional research design.

Further the brief employed a mixed methods research approach with both quantitative and qualitative data collection methods being used. To assess who the key players in the tourism industry are, Key Informant Interviews (KIIs) and desktop research was undertaken in April and May 2025.

Further, to assess the conservation attitudes that tourism stakeholders have, and evaluate the key threats to the tour and travel industry as identified by tourism sector stakeholders, a structured questionnaire was administered in May 2025.

The structured questionnaire was also used to evaluate tourism sector stakeholders' views on the perceived benefits and challenges of Uganda's oil and gas industry.

A total of 52 tourism sector stakeholders including tour operators, tour guides, travel agents, drivers, and hotel workers responded to the structured questionnaire. The sampling strategy that was employed was purposive sampling. The questionnaire was shared with over 306 tourism sector stakeholders, resulting in the aforementioned 52 responses.

The aforementioned respondents were drawn from across Uganda with focus being placed on respondents in the Albertine Graben and at national level. Uganda's oil and gas activities, as well as tourism activities, are concentrated in the Albertine Graben (Ssekatawa, 2024 & National Environment Management Authority, Undated). Most tour operators are also based at national level in Kampala or Entebbe (Centre for the Promotion of Imports, 2020). The above conditions informed the choice of respondents that were purposively sampled.

To analyse the impact of Uganda's oil and gas industry on micro and small businesses in the tourism sector in oil host districts, Focus Group Discussions (FGDs) were conducted with micro and small hotel as well as food and beverage business owners in Buliisa district in the Albertine Graben. The FGDs were conducted with 14 respondents in May 2025. The respondents were purposively sampled because the stakeholders work in the tourism industry and had knowledge of the subject under study.

Buliisa was chosen as the district for study because oil and gas activities including planned extraction, infrastructural developments (Petroleum Authority of Uganda, Undated), and accommodation of oil sector workers (Okello, 2025) among others are highly concentrated in the district.

Further, the district is home to micro and small enterprises that were set up to tap into much-touted oil sector opportunities including in accommodation, as well as provision of food and beverage services (Okello, 2025).

The data that was collected through document review, KIs, and FGDs was analysed between May and June 2025. The findings based on the aforementioned analysis are discussed in section 6 below.



Some micro and small business owners in the tourism sector during an FGD in Buliisa in May 2025

6. FINDINGS

This section outlines key findings including: the attitudes that stakeholders in the tourism and travel industry have towards conservation vis-à-vis oil and gas exploitation, and the key threats to the tour and travel industry as identified by tourism sector stakeholders.

Findings on tourism sector stakeholders' views on the perceived benefits of Uganda's oil and gas industry, and the challenges of Uganda's oil and gas industry to the tourism sector are also discussed in this section.

Further, this section discusses the impact of Uganda's oil and gas industry on select micro and small tourism sector businesses in oil host districts.

6.1. Demographic characteristics of respondents

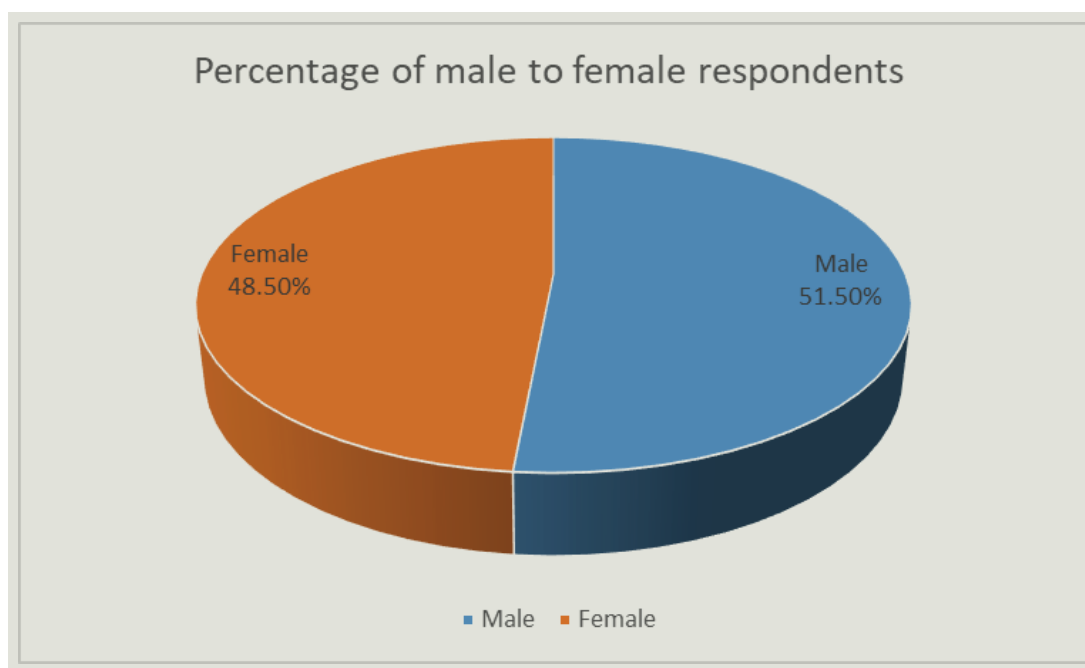
6.1.1. Sex of respondents

As indicated in section 5 of this report, 52 tourism sector stakeholders responded to the structured questionnaire that was used to collect data for this community based research brief. Further, 14 respondents participated in the FGDs that were used to collect data for this brief. This means that a total of 66 tourism sector stakeholders participated in the research.

Of the 52 stakeholders that responded to the structured questionnaire, 60% were male while 40% were female. Further, of the 14 respondents that participated in the FGDs, 21.4% were male while 78.6% were female.

This means that overall, 51.5% of this research's respondents were male while 48.5% were female as can be seen in figure 2 below.

Figure 2: Chart showing the sex of respondents



6.1.2. Age of respondents

Of the respondents that participated in this community based research, the majority, 63.6%, were between the ages of 18 and 35 years, while 36.4% were between 36 and 65 years. None was the above the age of 65 years. Below is a table highlighting the ages of the respondents.

Table 2: Age of respondents

Variable	Category	Frequency (n=52)	Percentage
Age group	18-35years	42	63.6%
	36-65 years	24	36.4%
	65 years and above	0	0.0%

6.2. Tourism associations to which respondents belong

Tourism associations in Uganda serve as essential platforms for collaboration, advocacy, and capacity-building within the sector. They bring together stakeholders such as tour operators, guides, accommodation providers, and other industry players to address challenges, share best practices, and promote sustainable tourism. These associations also play a critical role in lobbying for favorable policies, enhancing service standards, and supporting initiatives that foster biodiversity conservation (Uganda Tourism Board, 2020).

This research sought to understand the associations to which tourism stakeholders belong to better understand where power in the sector is concentrated.

Of the respondents that participated in the study, 28.8% were not affiliated with any tourism association. Among those who were members of associations, 17.3% belonged to the Uganda Safari Guides Association (USAGA), while 15.4% were affiliated with the Association of Uganda Tour Operators (AUTO).

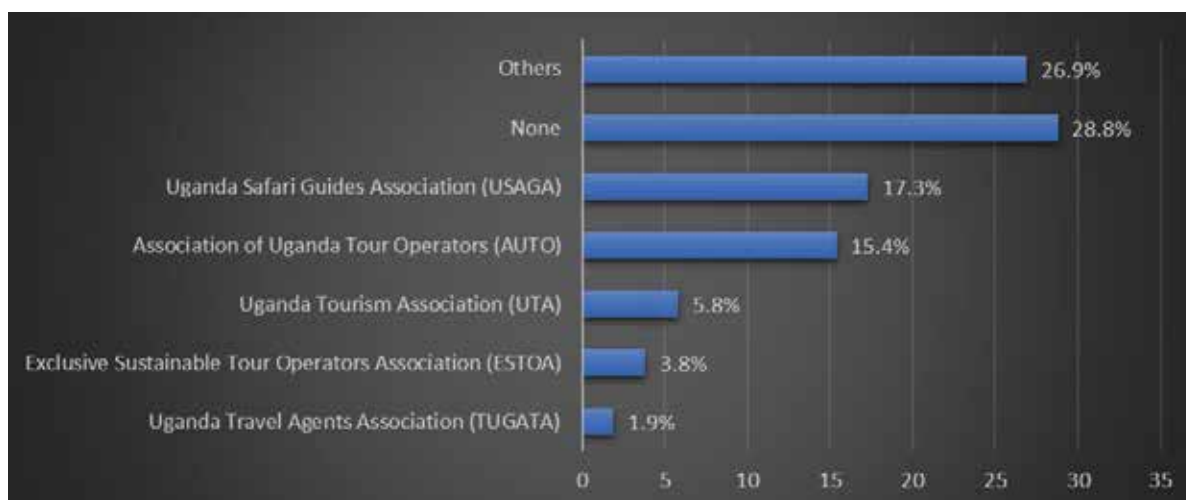
Further, 5.8% were members of the Uganda Tourism Association (UTA), while 3.8% were part of the Exclusive Sustainable Tour Operators Association (ESTOA). Only 1.9% belonged to the Uganda Travel Agents Association (TUGATA) while 26.9% belonged to other associations.

The other associations that the research respondents belonged to include Uganda Hotel Owners' Association, Karamoja Tourism Association, Katwe Eco-Tourism information Centre, Agro-Tourism Association, Tour Guides Forum and others.

While the majority of this community based research brief's respondents did not belong to any tourism industry association, the Centre for the Promotion of Imports (2020) notes that of the around 400 tour operators in Uganda, 80% are licensed members of AUTO.

Below is a graph showing the associations to which this study brief's respondents belong.

Figure 3: Tourism associations to which respondents belong



6.3. Importance of conservation to tourism sector stakeholders

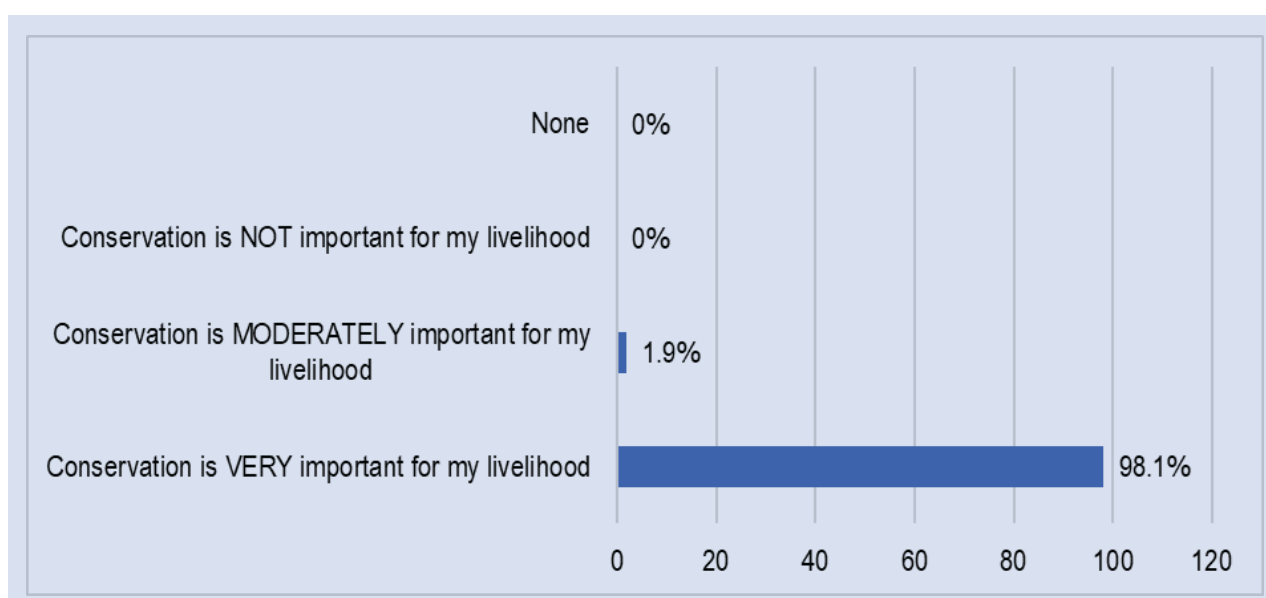
Conservation plays a critical role in sustaining the natural resources and biodiversity that underpin tourism activities, particularly in regions like Uganda, where eco-tourism and wildlife are key attractions. Understanding how stakeholders value conservation shows their commitment to sustainable practices and highlights areas where engagement may need to be strengthened.

This study explored the perceptions and attitudes that tourism sector stakeholders in Uganda have towards environmental conservation.

As shown under figure 3, the majority of respondents, 98.1%, perceive conservation as very important for their livelihoods, while 1.9% considered it moderately important.

This implies that the surveyed tourism operators largely acknowledge the direct link between sustainable environmental practices and the success of tourism activities.

Figure 4: Perceived importance of conservation among tourism sector stakeholders



6.4. Stakeholder perspectives on key threats to tourism industry

The tourism industry in Uganda heavily relies on the conservation of natural resources and biodiversity. However, various challenges threaten its sustainability, ranging from environmental degradation to policy and funding issues.

This study examined the perspectives of tourism sector stakeholders as regards the most significant threats facing the sector.

Of the respondents that participated in the study, the majority, 22.5%, identified biodiversity destruction as the leading threat to tourism, followed by underfunding of the sector by the government. 17.4% of the study's respondents identified this as a threat to the tourism industry.

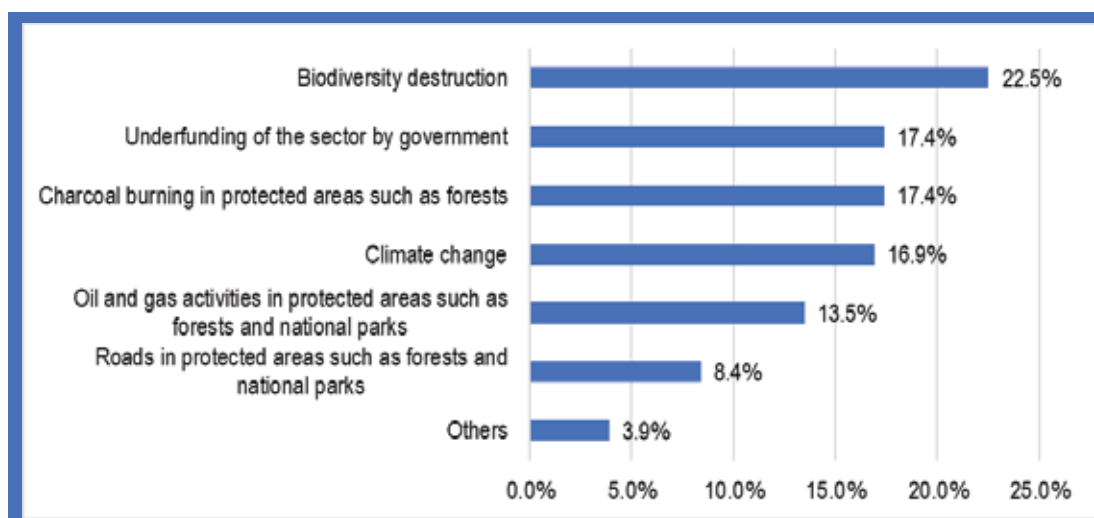
Other threats that were identified include charcoal burning in protected areas (17.4%), climate change (16.9%), oil and gas activities in protected areas (13.5%), as well as the development of roads in protected areas (8.4%).

Worth noting is that the oil and gas industry in Uganda remains a big threat to biodiversity conservation (TotalEnergies, 2019) and the burning of fossil fuels including coal, oil and gas remains the biggest driver of climate change (United Nations, Undated). Furthermore, the sector has led to development of infrastructure such as roads, pipelines and others in protected areas including Murchison Falls NP in Uganda (AFIEGO, 2024).

While only 13.5% the tourism sector stakeholders that participated in this study perceive the oil and gas industry as a threat to the tourism industry, the data shows that 61.3% of the respondents consider the industry and its associated impacts including biodiversity destruction, climate change and the development of infrastructure in protected areas as some of the biggest threats to their livelihoods.

Below is a graphic that shows the perceived threats to tourism identified by the tourism sector stakeholders that participated in this community based study.

Figure 5: Perceived threats to the tourism industry



6.5. Challenges posed by oil industry to Uganda's tourism sector

This community based research examined the challenges that Uganda's oil and gas industry poses to the tourism sector. Consequently, the research asked participants to identify the aforementioned challenges.

An analysis of the data that was collected from the respondents shows that 34.2% of the respondents consider the construction of oil infrastructure, such as roads and pipelines in protected areas as a major threat to tourism livelihoods. The participants noted that the above activities can create noise pollution and fragment natural habitats, forcing animals to move from protected areas and thus affecting livelihoods.

Further, 29.7% of the research respondents noted that the negative impacts on wildlife, habitats, and the environment could deter tourists, leading to a decrease in tourism revenue and employment opportunities for local communities.

In addition, 13.5% of the respondents noted that new roads and infrastructure could make it easier for poachers to access protected areas, negatively impacting wildlife populations and their ability to support tourism.

Furthermore, 12.6% indicated that oil drilling crews and auxiliary activities could increase the demand for accommodation, leading to higher costs for tourists and potentially deterring them. More can be seen in table 3 below.

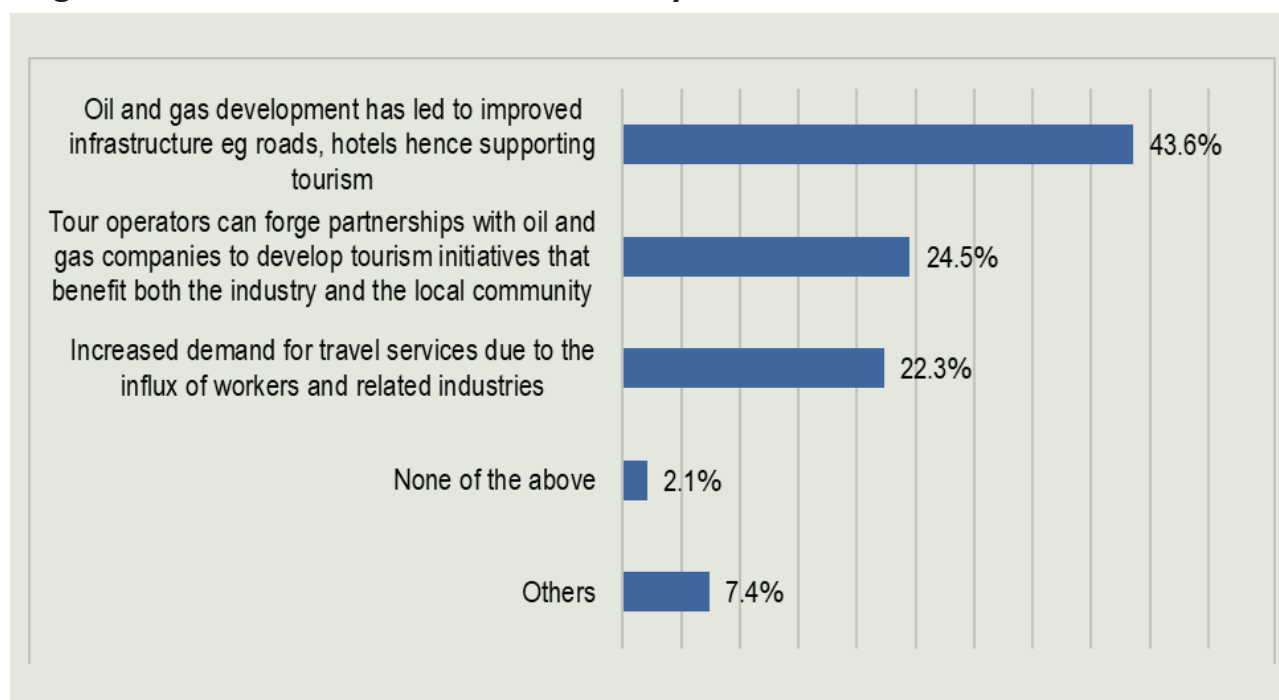
Table 3: Challenges posed by the oil industry to Uganda's tourism sector

Challenge	Percentage
Construction of oil infrastructure, such as roads and pipelines can create noise pollution and fragment natural habitats, forcing animals to move from protected areas, thus affecting my livelihood	34.2%
New roads and infrastructure can make it easier for poachers to access protected areas, negatively impacting wildlife populations and their ability to support tourism	13.5%
Oil drilling crews and auxiliary activities can increase the demand for accommodation, leading to higher costs for tourists and potentially deterring them	12.6%
Negative impacts on wildlife, habitats, and the environment can deter tourists, leading to a decrease in tourism revenue and employment opportunities for local communities	29.7%
None of the above	3.6%
Others	6.3%
	100%

6.6. Opportunities presented by the oil and gas industry to tourism stakeholders

While the tourism sector stakeholders that participated in this study observed that the industry could negatively impact their livelihoods, they noted that it could also offer benefits. Below is a graph highlighting the perceived benefits of the oil and gas industry to the tourism sector in Uganda.

Figure 6: Perceived benefits of the oil industry to the tourism sector



6.7. Experiences of micro and small business owners in the tourism industry

The oil companies operating in Uganda and GoU argue that the oil and gas industry has had a positive impact on the economy, including on local people hosting the country's oil reserves in districts such as Buliisa.

They note that in 2024 alone, "5,280 procurements worth US\$ 5.3 billion [were] made, of which 4,511 procurements valued at US\$ 2.1 billion (40%) were awarded to Ugandan companies. Community-based companies received contracts worth US\$ 19 million" (Ssekatawa, 2024).

Did micro and small businesses in the tourism industry benefit from the above reported investments? What impact has the oil and gas industry had on micro and small businesses in the tourism sector in Buliisa district, this community based research asked?

Worth noting is the fact that "90% of enterprises [in Uganda] are micro with an average of 2.1 employees" (Ministry of Trade and Industry and Cooperatives, 2024). Sectors that have a positive effect should impact micro and small enterprises therefore.

During FGDs that were conducted for this research brief in May 2025, the following were identified as the impact of the oil and gas industry on hotel owners as well as food and beverage service providers in Buliisa district:

- Diversion of hotel owners from the core business of catering to tourists to the oil and gas sector, which led to economic distress;
- Increased competition between local business owners and richer oil workers as well as others, leading to collapsing of some local businesses;
- Influx of oil workers and others leading to increased commodity prices, thereby raising the cost of doing business;
- Failure to avail opportunities for micro business owners;
- Increase in animal-human conflicts, leading to sanitation challenges that affect demand for services such as food; and
- Increase in elephant-human conflicts which could affect biodiversity conservation and therefore tourism among others.

More on the above is discussed further below.

Diversion of hotel owners from core tourism business

The respondents that participated in FGDs for this study observed that oil companies and the GoU had led massive campaigns in Buliisa district, during which they informed community members of economic opportunities in the oil and gas industry.

A male respondent, who is a hotel owner, observed as follows in May 2025, “In 2010, I developed a desire to set up a hotel. Tourists were my target because we neighbor Murchison Falls National Park. I realised my dream when I set up a small hotel. In 2016, those bad liars from the oil sector made a big crusade in Buliisa. They told us, ‘People of Buliisa, build hotels! Workers are coming! They will stay in your hotels!’”

He added, “I borrowed money and expanded my hotel. The crusade by oil companies continued, exciting many. In 2017, Tullow Oil gave me *jaribu* [a sample or trial run] by bringing ten workers to stay at my hotel. They slept there for like two weeks and left! Thereafter, oil activities stalled [due to a tax standoff between government and oil companies].”

The male hotel owner adds, “When the activities resumed, no oil workers came to stay at my hotel till todate. I struggled to pay back the money that I borrowed from two banks to invest in a hotel. The oil sector diverted my mind from tourism! They excited me with promises of money, but they ended up punishing me.”

Available information shows that some hotel owners in the Albertine Graben have raised complaints because as opposed to using their accommodation services, the oil and gas companies including TotalEnergies E&P (U) and China National Offshore Oil Corporation (CNOOC) Uganda Ltd operating in the country are using camps to house their workers.

Okello (2025) observes that Total has “1,000 of the 4,000 planned housing units for workers, all of whom are currently housed within the company’s camp. Similarly, CNOOC, which operates the Kingfisher Development Area in Buhuka, Kikuube District, is constructing around 2,000 housing units. Most of its workers are already staying in these camps.”

Increased competition

In 2019, TotalEnergies observed through the Environmental and Social Impact Assessment (ESIA) report for the Tilenga oil project that the development of oil and gas activities in the Albertine Graben is expected to cause a population influx or in-migration (TotalEnergies, 2019) with this influx leading to impacts such as increased community conflict, loss of sense of place and community, increased crime rate and others (TotalEnergies, 2019).

The company also observed that economic impacts such as economic loss due to damage of assets and injury of animals, job losses, and local price inflation among others (TotalEnergies, 2019) could be seen. While the tourism industry was not explicitly identified as one of those that would suffer the above impacts, the industry stakeholders in Buliisa district report that they are experiencing increased competition, which is affecting the profitability of their businesses.

A female respondent observed as follows during an FGD in Buliisa district in May 2025,

“Rich people have come here to Buliisa. They are investing in businesses such as accommodation, food and beverages. They compete with us the indigenous business owners and because they have more capital, we sometimes fail to compete.”

In relation to increased commodity prices, a female food vendor observed as follows during an FGD in Buliisa in May 2025, “As you can see, we live near Lake Albert. Fish here used to be abundant and cheap. When oil activities started, the population in Buliisa increased. This increased the demand for items such as fish, whose price increased. Fish that we used to buy at UGX 50,000 now costs UGX 90,000. This increase in the price of inputs negatively affected my business.”

Limited opportunities for micro business owners

As earlier indicated in this community based research brief, the oil and gas sector was heralded as one that would add economic value not only to Uganda’s economy at large, but to also the locals that are hosting the oil projects. In 2013, the GoU put in place oil sector laws including the Petroleum (Exploration, Development and Production), Act 2013 and Petroleum (Refining, Conversion, Transmission and Midstream Storage) Act, 2013 through which the oil companies operating in Uganda were mandated to ensure state and national (local) participation in the oil and gas industry.

The laws and their attendant regulations identified 15 goods and services including hotel accommodation and catering, transport, food and beverages, as well as clearing and forwarding among others that were ring-fenced for Ugandans (Stanbic Bank, Undated). The goods and services are supposed to be supplied by Ugandan companies unless they are not available locally.

The GoU and the oil companies operating in the country held awareness raising campaigns, leading to local businesses investing in various sectors. As earlier indicated in this brief, locals in Buliisa and elsewhere invested as well.

Are micro business owners in the tourism industry beneficiaries of Uganda's local content efforts? During an FGD held with tourism sector stakeholders in Buliisa district in May 2025 as well as a community meeting held with community members in Kyotera district during the same month, the stakeholders that participated in this research reported that they were not beneficiaries.

A female beverages vendor observed as follows during an FGD in Buliisa, “I have a refreshments business but those people from the [Tilenga oil project] camp do not buy from me. They do not give opportunities to local businesses to supply them.”

A male hotel owner from Buliisa further observed, “Since oil activities started, I have not received any good thing! In fact, if you move all over Buliisa and speak to business owners, they will tell you that local content is not there. These oil companies have neglected us. They don't use our services.”

The business owners complained that thousands of oil sector workers live in a camp managed by oil companies. The workers rarely leave the camp to buy goods and services from local businesses.

The business owners that participated in this study, who also include local communities that had hoped to supply food to the oil sector, also observed that they had not supplied the sector.

A small-scale farmer from Lusese village in Kyotera district observed as follows in May 2025, “None of us have supplied food to the [EACOP] camp in Ssembabule district.”

Trained but not retained

In relation to the above, the micro and small business owners in the tourism sector from Buliisa district that participated in this study observed that even where they had the requisite skills, having been trained by the oil companies operating in the country, they have not been given the opportunity to supply services to the sector.

A female food service provider said during an FGD, “They found me with a hotel [restaurant] and trained me in catering. I even got two certificates but when I asked to cook and supply the camp, they refused.”

Compulsory land acquisition impacts

To set up infrastructure to enable oil extraction and transportation, the oil companies in Uganda have acquired land in Buliisa and other districts. The total land take for the three main projects under the Lake Albert Development Oil Project including the Tilenga, Kingfisher and East African Crude Oil Pipeline (EACOP) is approximately 4,943 acres (Petroleum Authority of Uganda, Undated).

Of the above, approximately 1,183 acres is being acquired for the Tilenga oil project, which is partly located in Buliisa district.

Micro and small business owners in the district reported that the compulsory land acquisitions had had an impact on their businesses.

A female food service provider observed during a May 2025 FGD, “Animals used to have ample grazing ground. This reduced when land was acquired for the oil project. Today, cows roam in town and they also come to our hotels [restaurants]. They raise sanitation challenges as they leave their waste everywhere. This deters customers from coming to our restaurants.”

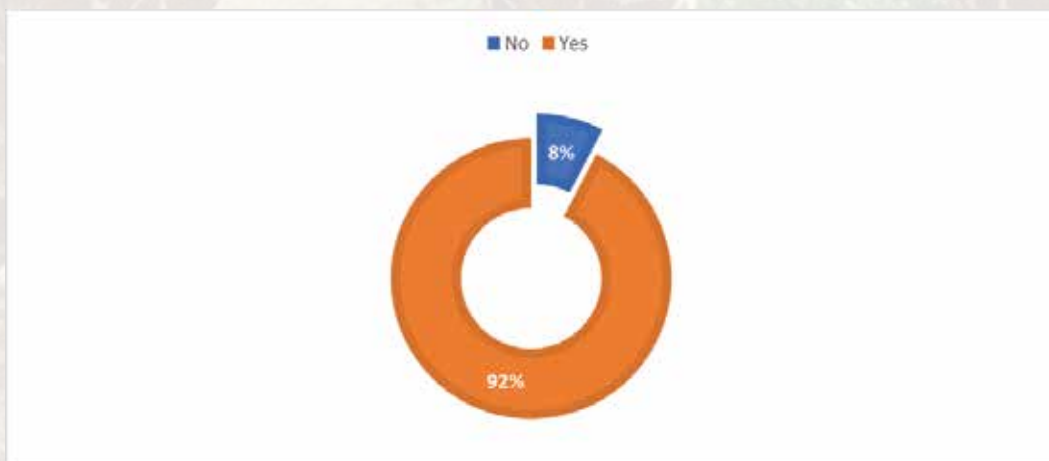
7. GOVERNMENT AND OTHER STAKEHOLDERS ENGAGEMENT

Based on the above challenges, and the risks posed by the oil and gas industry to the tourism sector, the respondents that participated in this study observed that tourism sector stakeholders ought to engage the GoU and oil companies to protect their livelihoods amidst oil and gas activities.

This engagement is seen as critical for addressing the environmental and economic impacts of oil development while ensuring the tourism industry remains resilient and sustainable.

As shown in Figure 7 below, the majority of respondents, 92%, believe that tour operators should actively engage oil sector players and government to protect their livelihoods, while 8% were opposed to this view. This indicates a strong call for proactive dialogue to ensure that the interests of the tourism sector are represented and protected.

Figure 7: Tourism sector stakeholders’ views on whether they should engage government and oil sector players to protect their livelihoods amidst oil activities



8. MESSAGES TO GOVERNMENT AND OIL COMPANIES

This research sought to understand the messages that tourism sector stakeholders would like to share with the GoU and oil companies in their engagements. The messages are shared below:

- Government and oil companies should not drill for oil in protected areas;
 - Enforce Environmental Impact Assessments (EIAs), buffer zones, and no-drill areas in or near national parks like Murchison Falls and Queen Elizabeth;
 - Tourism depends on intact ecosystems. Protecting national parks and biodiversity hotspots is non-negotiable;
 - Conservation should be a number one priority for all tourism sector players in Uganda;
 - Ensure oil activities don't harm tourism infrastructure or increase expenses incurred by tourists;
 - Community involvement in decision making promotes tourism;
 - Community revenue sharing models in tourism activities enhance community conservation efforts;
- and
- Promote responsible tourism practices where local communities are involved to ensure equity among others.



An oil rig in Murchison Falls National Park; some tourism sector stakeholders want national parks to be delegated as no-go areas for oil drilling.

9. CONCLUSION AND RECOMMENDATIONS

Tourism sector stakeholders including tour operators, drivers, guides, hotel owners and workers, food and beverage service providers as well as local communities consider biodiversity conservation as very important for their livelihood.

The stakeholders are concerned about the impacts of oil activities on their livelihoods, observing that the oil and gas industry can cause biodiversity loss, increase poaching, cause price increases in accommodation and have other negative impacts on tourism.

Some tourism sector stakeholders however note that the oil and gas industry can have positive impacts, such as causing improvements in infrastructure, which eases access to tourism sites.

Despite the above belief, FGDs with micro and small business owners in Buliisa district where oil and gas activities are ongoing show that little to no benefits have been accrued by the micro and small tourism sector enterprises. Instead, the businesses have suffered negative impacts ranging from increased commodity prices, increased oil-induced debt amidst limited business opportunities, compulsory land acquisition impacts and others.

The tourism sector stakeholders are of the view that there must be dialogue with the GoU as well as the oil and gas companies operating in Uganda to address the impacts and risks of the oil and gas industry to tourism livelihoods.

Some of the key messages that the stakeholders would share during the dialogue is that there must be no oil drilling in protected areas, and buffer zones that disallow oil activities in protected areas must be established among others.

The respondents that participated in this community based research made the following recommendations:

- (i) Protected areas such as forests, national parks and game reserves,** wetlands, lakes, rivers and others should be no-go areas for any oil and gas activities.
- (ii) In addition, the GoU should support micro and small enterprises** in the tourism sector by providing capital where needs be, and by marketing tourism-related activities.
- (iii) Furthermore, the GoU should increase funding for the tourism sector,** which continues

to face a challenge of under-funding. For instance, during the current financial year (2025/2026), the GoU allocated UGX 430 billion to the sector, which remains below the NDP IV target of UGX 464 billion.

(iv) To create an enabling business environment, the GoU should reduce the taxes on businesses in the tour and travel industry.

(v) In addition, the GoU should engage TotalEnergies to address the oil-induced animal-human conflicts in Buliisa district that are affecting or stand to affect the tourism sector.

(vi) Finally, leaders of associations in the tourism and travel industry should foster independent and tourism sector-led dialogue with the GoU to address the challenges posed by Uganda's oil and gas industry to tour and travel livelihoods. Currently, the dialogues that are held are led by the oil and gas industry, and these allay tourism sector stakeholders' fears while playing up the benefits of the oil and gas industry. The potential negative impacts are downplayed.



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