

UGANDA BUREAU OF STATISTICS



OIL AND GAS INVESTMENT STATISTICS

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PREFACE



The Uganda Bureau of Statistics (UBOS) has embarked on production of Oil and Gas Investment Statistics. The statistics monitors developments in the Estimated and Final Investments within the Oil and Gas sub-sector.

This follows the discovery of commercially viable quantities of Oil and Gas deposits in the country and the subsequent licensing of several firms to undertake the Exploration and Production activities.

These activities attract huge investments which needed to be captured in Uganda's National Accounts. Oil and Gas Investment Statistics is compiled in accordance with the International Standard Industrial Classification (ISIC) Rev. 4 manual covering establishments engaged under the Mining and Quarrying subclass 0610, 0620, 0910 and 0990. The Statistical Unit of Oil and Gas Investments is the Licensee.

Oil and Gas Investment Statistics is important for economic analysis and policy making because it provides insight into the various types and amounts of investments being made. The statistics are vital in the compilation of National Accounts and provides a picture of how investments in the Oil and Gas sector will change in the short, medium and long term.

The Bureau wishes to inform the users of the report that the information therein only includes the total Investments in the Oil and Gas Sector. The report does not provide information on how the proceeds of the investment is used and shared as this is beyond the mandate of the institution.

The publication of this report has been made possible by the cooperation of business establishments and regulators engaged in the Oil and Gas sub-sector. The Bureau takes this opportunity to appreciate all those that provided information during this important undertaking. It is our sincere hope that the findings in this report will be useful in supporting the development of the Oil and Gas Sub-sector.

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ABBREVIATIONS AND ACRYNOYMS

BoU	Bank of Uganda
CEO	Chief Executive Officer
FDI	Foreign Direct Investment
FID	Final Investment Decision
GDP	Gross Domestic Product
HoD	Head of Department
ISIC	International Standard Industrial Classification of Economic Activities
MoFPED	Ministry of Finance Planning and Economic Development
NDP	National Development Plan
NGL	Natural Gas Liquids
NSD	National Supplier Database
OGISS	Oil and Gas Investment Statistics Survey
PSA	Petroleum Sharing Agreement
QHSE	Quality Health Safety
тт	Technical Team
UBOS	Uganda Bureau of Statistics
UIA	Uganda Investment Authority
USD	United States Dollars

GLOSSARY

Allowances are employee monthly entitlements. These are monthly allowances that do not vary from month to month. Examples include fixed food and housing allowances.

Buildings and constructions (Manufacturing, Mining and Quarrying): Manufacturing plants, workshops, storehouses, office buildings, social welfare installations (not houses), docks, silos, mines, quarries, roads, foundations, tunnels, dams, power lines, pipelines etc. except major repairs and reconstruction projects are also to be included.

Cars and other means of transport: All types of vehicles, industrial railways, cranes and other means of transport.

Company Cost: These are cost that the Oil company meets outside the licence e.g. Corporate social responsibility.

Delivery point: The point at which petroleum passes through the intake valve of the pipeline, vessel, vehicle or craft at a terminal or refinery in Uganda. (EDP Act 2013)

Development area: An area constituted by a block or blocks which, following a ccommercial discovery of petroleum, has been delineated for production according to the terms of the petroleum agreement.

Development: The planning, placement, construction and installation of facilities needed for production of petroleum.

Discovery area: A block or blocks in an exploration area comprising the geological feature as outlined by the relevant geological or geophysical data in which a discovery is located.

Discovery: Establishment through drilling of a well the presence of petroleum not previously known to exist, and which is recoverable at the surface in a flow which can be measured by petroleum industry methods.

Downstream: The oil and gas industry value chain is usually divided into three major stages: upstream, midstream and downstream. The Downstream interacts with consumers through products such as gasoline or petrol, kerosene, jet fuel, diesel oil, heating oil, fuel oils, lubricants, waxes, asphalt, natural gas, and liquefied petroleum gas (LPG) as well as hundreds of petrochemicals.

Drilling: Perforation of the earth's surface for purposes of making a discovery, establishing the extent of a discovery or production of the discovered petroleum.

Enterprise: The smallest combination of legal units that is an organisational unit producing goods or services and that benefits from a certain degree of autonomy in decision making.

Estimated Investments: Acquisitions that the establishment plans to make throughout the present quarter and in the short and medium run.

Exploration area: An area constituted by a block or blocks that are, or can be, subject to a petroleum exploration license.

Exploration: Undertaking of activities, whether on land or water, for the purpose of discovering petroleum and includes geological, geophysical and geochemical surveys, and drilling of wells for the purpose of making a discovery and its appraisal;

Facility:

(a) Any structure, device or other associated installations or infrastructure including pipelines, valve stations, pump stations, compressor stations and equipment constructed, placed or used in order to carry out petroleum activities;

(b) Any stationary vessel, vehicle or craft use for drilling or support of ongoing petroleum activities; and

(c) Any vessel, vehicle or craft for transportation of petroleum in bulk when connected to a facility for loading of petroleum.

Field: A geological structure or feature which hosts one or more reservoirs from which petroleum production may be commercially undertaken through a defined set of facilities.

Field development plan: The field development plan referred to in section 71.

Final investment decision (FID): FID is the point in the capital project planning process when the decision to make major financial commitments is taken. At the FID point, major equipment orders are placed, and contracts are signed.

Final investments: Acquisitions that the establishment has made throughout the previous quarter. The concept of final investments does not necessarily imply that the acquired material is put to use.

Flaring: Combustion of hydrocarbons without the application of the resulting heat or gases for any useful purpose.

Gas venting: The release of gas to the atmosphere.

Graticulation: The division of the earth's surface into blocks for petroleum activities.

In-kind payments: Any form of reimbursements, including for expenses incurred by an employee in the course of his employment and productivity incentive payments. Contributions payable by the employer to any pension or provident fund, including any contributions made on the employee's behalf and gratuity payable on discharge, retrenchment or retirement of the foreign employee.

Investment: All acquisitions of new fixed assets with a lifetime of more than one year. The acquisitions must be reported in the period they are made even if they are not being paid for or activated in the accounts.

License issued under this Act: An official document that gives you permission to own, do or use something provided for under the relevant law (Act of Parliament), usually after you have paid money and/or taken a test.

Licensee: A person to whom a license is granted.

Machinery: All types of permanent mechanical and electrical equipment, i.e. machinery (including industrial furnaces), transformers, computers (hardware and software), instruments and parts (including installation) plus tools that have a lifetime of several years.

Midstream: segment of the oil and a gas value chain that involves the transportation (by pipeline, rail, barge, oil tanker or truck), storage and wholesale marketing of crude or refined petroleum products. Pipelines and other transport systems can be used to move crude oil from production sites to refineries and deliver the various refined products to downstream distributors. Natural gas pipeline networks aggregate gas from natural gas purification plants and deliver it to downstream customers, such as local utilities.

National content: The development of local skills, oil and gas technology transfer and use of local manpower and local manufacturing. For a more practical definition, one could say that National content is building a workforce that is skilled and building a competitive supplier base (Oil and Gas, 2010).

Natural gas: All petroleum which is in a gaseous state at 15^oC at atmospheric pressure, including wet gas, dry gas and residue gas remaining after the recovery of liquid hydrocarbons.

Oil terminal: An industrial facility for the storage of oil and/or petrochemical products and from which these products are usually transported to end users or further storage facilities. It typically has tankage, either above ground or underground, and gantries (framework) for the discharge of products into road tankers or other vehicles (such as barges) or pipelines. **Operator:** A licensee or any other entity executing on behalf of one or several licensees, the day-to-day management of petroleum activities.

Petroleum:

(a) Any naturally occurring hydrocarbons, whether in gaseous, liquid or solid state; or(b) Any naturally occurring mixture of hydrocarbons, whether in a gaseous, liquid or solid state; or

(c) Any naturally occurring mixture of one or more hydrocarbons, (whether in a gaseous, liquid or solid State and any other substances) including any petroleum as defined by paragraph (a), (b) or this paragraph.

Pipeline Transportation: A method in which liquid, gaseous, or solid products are moved over long distances through pipelines. It is used mainly for conveying natural gas, petroleum products. The movement of crude Oil from the Oil Wells to the either the CPF or export Hub.

Reservoir: A naturally occurring accumulation of petroleum in a geological unit limited by rock characteristics, structural or stratigraphic boundaries, contact surface between petroleum and water in the formation, or a combination of these, so that all the petroleum comprised in the geological unit is in pressure communication through liquid or gas.

Salary: Payment that does not vary from month to month, regardless of employee or company performance and regardless of whether the employee takes medical or personal leave. Fixed monthly salary does not include variable allowances, overtime payment, bonus, commission or annual wage supplements.

Shutdown and removal also includes permanent shutdown (plugging) of wells. In the annual statistics, these costs were only collected for fields which were actually shut down. As of 2013 these costs are also collected for all active fields, since permanent shut down of wells may be performed while the field is still in production. Thus, these types of costs are now collected by a larger population than before the revision. Hence, the figures for removal and shutdown before and after 2013 are not comparable. However, it may also be the case that costs related to shut down of wells which were not reported as shut down and removal before 2013 may have been included as production drilling investments under the category production.

Wages: Fixed regular payment, typically paid on a daily or weekly basis, made by an employer to an employee, especially to a manual or unskilled worker. It's also de-

fined as payment usually of money for labour or services usually according to contract and on an hourly, daily, or piecework basis.

Upstream: Segment of the oil and a gas value chain that comprises of the exploration, development and production activities.

Waste: Any matter prescribed to be waste and any matter whether liquid, solid, gaseous or radioactive which is discharged, emitted or released to the environment in such a volume, composition or manner as to cause an alteration of the environment.

EXECUTIVE SUMMARY

The Uganda Bureau of Statistics (UBOS) has been collecting quarterly Oil and Gas Investment Statistics since 2016. The main objective of the report was to provide information on current and anticipated investments in the Oil and Gas sub-sector. This information will be used by different stakeholders in the Oil and Gas sub-sector to shape the decision making through providing accurate and reliable statistics that support policy formulation processes.

The report targeted all establishments engaged in activities that are classified under Mining and Quarrying subclass 0610, 0620, 0910, 0920 (ISIC Rev.4) and have Exploration and Production licenses issued by the Ministry of Energy and Mineral Development.

The report therefore presents findings related to Estimated, Final Investments and National Content (Benefits into the economy) within the Oil and Gas sub-sector. These constitute contract expenditures incurred with petroleum activities conducted and classified under: Exploration, development, operating expenses, Service costs and General and Administrative Expenses.

The combined/summation of total investment expenditure by Oil and Gas exploration and producing companies provides a more comprehensive presentation of final and planned investments for oil and gas, manufacturing, mining and quarrying and electricity supply.

Annual Investment

- There was an annual increment in Investment by 57.6 percent in 2023 compared to 2022. This was due to total Investment increasing from 1,241.4 to 1,956.9 million USD. This investment was a result of the Final Investment Decision (FID) that was taken in February 2022.
- In 2021, total investments increased to 547.6 million USD from 139.6 million USD in 2020, which represents a sharp rise of about 292.2 percent; which was partly an impact of the negotiation and signing of the key commercial agreements for East African Crude Oil Pipeline (EACOP) together with entry of Uganda National Oil Company (UNOC) into the Production Sharing Agreements in April 2021.

Quarterly Total Investment up to Q4 2023

- From 2017 to Q2 2021 the quarterly total investment in the Oil and Gas sector in Uganda was on average 80 million USD. However, from Q3 2021 there was a drastic percentage change in Total Investment of 187.6 percent compared to Q2 2021.
- The total quarterly Investment in Q4 2023 increased by 39.3 percent compared to the Investment level in Q3 2023. The Total quarterly Investment in Q4 2023 was 672 million USD.

Annual Investment by Cost Category

- After appraisal of several Oil and Gas discoveries in 2013 and 2014, the project activities transitioned from exploration and appraisal to planning for the development of these discoveries. This was the reason why investment in exploration activities dropped and remained low from 2018-2022.
- In the period 2018-2023, investment in Field Development took centre stage with oil companies investing over 90 percent in this area than other cost categories. However, during 2023, oil companies invested more in Development contributing up to 99.9 percent of the expenditure.

Annual Expenditure on Exploration Activities

- Under exploration, oil companies invested their monies in Direct Exploration Costs, General Administration, Services and National content.
- From 1998 up to 2002, investment in exploration was gradually increasing until 2002 when it hit a maximum of 19.5 million USD. Then investment in Exploration temporarily dwindled to its lowest in 2006.
- From 2007, there was increased investment in exploration which reached a maximum in 2008 at 50.0 million USD.

Annual Expenditure on Field Development Activities

In 2021, there was 517.5 percent increment in investment in the Oil and Gas Sector compared Development Expenditure 2020. There was a total of 1,232 million USD in Field Development in 2023. This in-vestment was inclusive of Direct Field Development, supporting services and General Management and administration. xiii | Page Oil and Gas Investment Report - 2023 This was 68.9 percentage increment compared to investment in 2022 where investment in Field Development was 729 million USD

Annual Expenditure on Production

During the period under review, there were no investment in production activities. This is only natural since no Oil field has entered the production phase yet. However, a total of nine active production licenses have so far been issued to the Joint venture of three international oil companies. , as shown Table 3. It is envisaged that commercial Production of Oil and Gas will be achieved after 2025.

Quarterly Total Investments

- Total Quarterly Investment during Q4 in 2023 increased by 39 percent compared to Q3 of 2023. This was higher than the 15.8 percent increment from Q2 in the same year.
- There was a consistent increment in all the quarters of 2023 save for Q4 which had a higher rate.
- Generally, from 2017 to Q3 in 2021, the total Quarterly investment was always below USD 100 million every Quarter.

Value of National Content in million USD

- From 2017 to 2020, the average value retained in terms of National Content (Locally spend within the year from procurements, salaries including taxes and training) was about 24.8 million USD.
- In 2021, there was a drastic increase in the total value retained in terms of National content to 376.3 million USD. The value of National Content climaxed in 2022 to 925.4 Million USD.

Annual Employment in the Oil and Gas sub-sector 2017-2023

- In 2021, the number of employees increased to 5,046, showing a huge percentage increase of 1902.4 percent compared to the number of employees in 2020.
- In 2022, the number of employees increased by 111.1 percent compared to the number of employees in 2021. This was as a result of the number of

employees increasing to a total of 10,651 employees in the Oil and Gas Exploration Sector in Uganda.

 Employment rate slowed down in 2023 compared to 2022, though overall number of persons employed has continuously kept increasing reaching 13,067 individuals in 2023.

Composition of Oil and Gas Workers by sex

- Generally, the percentage of males was higher than females for any particular year. The highest percentage of female workers was recorded in 2020 at 42.9 percent
- In 2022, the percentage of Males was 82.1 percent while females were only 17.9 percent of the workers. In 2023, the percentage female workers dropped further down to 16.6 percent.

Employment by Nationality as at 31st December 2023

- Ugandans constituted 94 percent of employees in the Oil and Gas Sector in 2022 and later reduced to 90 percent in 2023.
- In 2023, the number of employees in the Oil and Gas companies increased from 10,651 to 13,067 employees.

Number and Value of Oil and Gas contracts awarded

- The overall Value of contracts awarded in the sector increased by 173.5 percent in 2022 as compared to 2021. Similarly, the value of contracts awarded to Ugandan companies increased by 8,465 percent in 2021 as compared to 2020 (from USD 13 Million to USD 1,149 Million).
- The highest value of the contracts was recorded in 2022 at 3,289 million USD; of which a paltry 17.6 percent of the value was awarded to Ugandan companies.

Businesses in National Supplier Database (NSD)

In 2018, there were 1752 companies in NSD showing a net Addition: 1,239 companies joined the NSD. While in 2019, there was a net Decrease of 151 fewer companies. This decrease was due to more companies failing to renew

their registration than new companies entering due to various economic reasons.

 In 2019 and 2022, the total number of businesses were 1601 and 2,400 after a net exit of 151 and 302 respectively. This led to percentage reduction of 8.6 and 11.2 in from the 2018 and 2021 totals.

In 2023 there was significant growth in the total number of companies to 2,941 after a net addition of 547 companies. This showed a percentage increase of 22.8% compared to 2022.

Capacity Development (Building)

In 2018, there were 9 civil servants trained in the management of Oil and Gas resources.

In 2021, there were 76 staff in government and Local government whose skills were enhanced in the various areas of Oil and Gas. This was 81.1 percent increment compared to the number trained in 2021.

Cost of training conducted by Oil and Gas Companies

- In 2017, the total cost of training was USD 242,898 which was increased to USD 730,145 in 2018, which was a 200 percent increment.
- In 2021, the amount resources spent on trainings increased significantly by slightly over 258 percent, which further rose by 236 percent in 2022.

Estimated Investments Vs Actual Investments in the Oil and Gas Sector

From 2017 to 2021, the actual investment expenditure was always higher than the estimated (Budgeted). The greatest deviation was by 85.1 percent in 2019. The least deviation was in 2022 when the actual expenditure was just 0.09 percent more the estimates for the year. In 2023, the actual investment expenditure deviated by 32.3 percent from what was estimated.



CHAPTER ONE: OIL & GAS INVESTMENT STATISTICS 1.1 Introduction

Uganda discovered commercially viable oil deposits in the Albertine Graben region in 2006 and has since embarked on establishing effective management procedures to promote growth and development for the country. By the end of 2013, Uganda's Petroleum Initially In Place (PIIP) were estimated by the Ugandan Petroleum Exploration and Production Department to be 6.5 billion barrels with a technically recoverable reserves of between 1.4 to 1.6 billion barrels, which were expected to yield at least US\$ 1 - 2.5 billion per year for 25 years once commercial oil production commences.

To exploit these resources, large investments will be required for further exploration, development and extraction. In addition, government will invest in the necessary physical infrastructure (NDPIII 2010/11- 2014/15).

However, sustainable exploitation of the petroleum resources in a timely manner is a major development challenge that this programme must address as envisaged in Third National Development Plan (NDPIII) 2020/21 – 2024/25. This is caused by specific challenges including:

- Inadequate infrastructure to support the development of oil and gas resources;
- Un-harmonized legal and regulatory framework;
- Protracted negotiation for the Final Investment Decision (FID) between government and the International Oil Companies (IOCs);
- Land acquisition issues (high costs, cultural issues);
- Limited human and institutional capacity to support oil and gas operations;
- Unnecessary delays to grant approvals by relevant government agencies (ESIAs, water permits);
- Limited private-led investment in the oil and gas industry;
- Limited refined petroleum storage infrastructure;
- Low Liquified Petroleum Gas (LPG)uptake and
- Unpreparedness to tap the local content potential.

Since oil exploration began, the Government of Uganda has undertaken several initiatives to address these challenges along the Oil and Gas Value Chain. Key milestones include the following years:

- Promoted the prospectivity of the sedimentary basins in Uganda leading to the first commercial discovery in 2006.
- Appraisal of the discovered oil fields between 2007-2016 to establish methods for optimally producing oil and gas.
- Putting in place a National Oil and Gas Policy for Uganda in February 2008
- Entry of TotalEnergies E&P Uganda B.V. and CNOOC Uganda Limited in 2011
- Grant of production licence for the Kingfisher oil field in February 2012
- Passing of the Petroleum laws in 2013 and attendant regulations in 2016
- Signing an MoU between Government and the licensed oil companies on commercialization of the country's oil and gas resources in February 2014
- Establishing the most optimal route for exporting crude oil from the Albertine Graben to the East African Coast between 2015-2017
- Establishing the PAU and UNOC in October 2015 to regulate and handle the State's commercial interests in the country's oil and gas sector respectively.
- Grant of petroleum production licences for the oil fields in Tilenga project in Exploration Area 1 and Exploration Area 2 in August 2016.
- Upgrade of 700kms critical roads infrastructure that started in 2018
- Signing of the Inter-Governmental Agreement between Uganda and Tanzania for the development of a crude oil export pipeline in May 2017.
- Entry of Oranto Petroleum and Armour Energy in 2017.
- Conclusion of the Front-End Engineering and Design (FEED) studies for the Kingfisher, EACOP and Tilenga projects in Nov 2017, February 2018 & May 2018, respectively.

- Issuance of the Environment and Social Impact Assessment (ESIA) Certificates for the Tilenga, Kingfisher and EACOP projects in April 2019, March and December 2020, respectively.
- Land Acquisition (10,000 project affected persons); started in 2016 through rigorous and extensive Resettlement Action Planning and implementation; 100% complete for Kingfisher, 100% for Tilenga, 99% for EACOP.
- Negotiation and signing of the Host Government Agreement, the Tariff and Transportation Agreement, and the Shareholders Agreement for EACOP together with entry of UNOC into the Production Sharing Agreements in April 2021.
- Passing of the legislation for operationalization of the EACOP in December 2021 - the EACOP (Special Provisions) Act 2021, the Public Finance Management (Amendment) Act 2021, and the Income Tax (Amendment) (No.2) Act 2021.
- Announcement of the Final Investment Decision in February 2022

Monitoring these activities through reliable statistics is essential for assessing performance and informing policy decisions.

The Oil and Gas Investment statistics, therefore, monitors the development in Estimated and Final investments within the Oil and Gas sub-sector. These investments constitute contract expenditures incurred within the petroleum activities conducted. The expenditures are classified under (i) Exploration, development, operating expenses; (ii) Service costs; and (iii) General and Administrative Expenses.

Furthermore, the survey also seeks to identify benefits that accrue from the activities of the oil and gas industry to the citizens of the country (National content), in terms of employment opportunities, trainings, awarding contracts, skill development and technology transfer among others.

The combined/summation of total investment expenditure by Oil and Gas exploration and producing companies will provide a more comprehensive presentation of final and planned investments for oil and gas, manufacturing, mining and quarrying and electricity supply. Internal users include DMES in compilation of **National Accounts** while External users include the mass media, banks and financial institutions as well as public institutions such as the Ministry of Finance, Planning and Economic Development (MoFPED), the Uganda Investment Authority (UIA) and the Bank of Uganda (BoU).

Oil and Gas investors look for economic indicators to help them understand future movements in the petroleum industry. Just like in commodity markets, petroleum oil and natural gas companies' future estimated investments are sensitive to inventory levels, among others. They are also important for Government planning purposes.

1.1.1 Objective of Oil and Gas Investment Statistics

The key objective of Oil and Gas Investment Statistics is to provide information on current and future anticipated investments in the Oil and Gas sub-sector. This information will be used by different stakeholders in the Oil and Gas sub-sector to shape the decision making through providing accurate and reliable statistics that support policy formulation processes. Specifically, the report will:

- Be used to highlight the Oil and Gas sub-sector contribution to the economy, integrating the macroeconomic modelling and micro simulation.
- Give a picture of how the investment in Oil and Gas sector will develop in the short- and medium-term.

1.1.2 Justification

The proper management of Oil and Gas Investment statistics benefits Uganda in its quest for achieving the eradication of extreme poverty and achievement of the Vision 2040. The benefits include the following among others:

- Oil and Gas will contribute to economic growth and development of the country. Therefore, a proper statistical accountability will provide policy makers with tools to measure of economic progress as well as make informed decisions.
- The understanding of Oil and Gas sub-sector will lead to a better understanding of other auxiliary statistics. The discussions on Oil and Gas by default leads to discussions of support services activities to Oil and Gas, business registers, national participation, employment, National Accounts, population patterns, migration of people and animals, among others.

1.2 Methodology

1.2.1 Introduction

The section discusses data sources, scope and coverage, survey design, survey instruments, survey organisation. In addition, data collection techniques and instruments, data editing and estimation methods used, including method used for quality and control and monitoring techniques used.

1.2.2 Data Sources

All active licensed enterprises or investment enterprises within the Extraction of crude oil (0610), Extraction of natural gas (0620), Support activities for petroleum and natural gas extraction (09910) and Support activities for other mining and quarrying activities (0990) were interviewed.

1.2.3 Scope & Coverage

The survey covered various services from mining and quarrying activities as classified in the ISIC, Rev 4¹, section B, division 06 and 09 for only establishments licensed within the country. The activities include:

- a. Extraction of Crude Petroleum
- b. Extraction of Natural Gas
- c. Mining Support activities for Petroleum Extraction
- d. Support activities for Natural Gas extraction
- e. Support activities for other mining and quarrying activities

1.2.4 Survey Design

The survey was designed to provide National Estimates for the country as a whole. Figures for accrued and estimated investments in the oil and gas activity were collected for a number of goods and services. The investments contained in the extraction of crude oil and natural gas, and support activities for extraction of petroleum and natural gas and were divided into investments for exploration, development and Production activities.

1.2.5 Data collection Instruments

The data collection instruments involved the following documents:

¹ **ISIC Rev. 4** is a standard classification of economic activities arranged so that entities can be classified according to the activity they carry out. In addition, the **Revision 4** of **ISIC** has improved comparability with other regional activity classifications in use around the world.

- a. The Oil and Gas Investment Statistics Quarterly Questionnaire
- b. The Oil and Gas Investment Statistics User Manual for Data Collection
- c. A Concept Note for the Oil and Gas Investment Statistics
- d. A Monograph for Oil and Gas Investment Statistics
- e. Metadata for Oil and Gas Investment Statistics

1.2.6 Survey Organisation

Teams comprising of field supervisors and interviewers were constituted to implement survey field activities. The teams underwent training with the focus of generating the competencies in practical questionnaire administration. The UBOS Senior Staff coordinated and supervised survey field activities for quality control purposes and for ensuring compliance with set field practices. Field staff were also trained on how to interact and build rapport with respondents to gather the relevant information.

1.2.7 Data Collection methods

The information on investments was collected by the trained field interviewers using a paper questionnaire that was administered to the licensed² Oils and Gas Exploration companies operating in Uganda. The required data was collected on a quarterly basis. The questionnaire was designed in accordance with the survey objectives and anticipated data to be collected.

1.2.8 Field Organisation

Field Organisation plays a crucial structural role as the main link between those who seek data (survey organisers) and those who have data (respondents). The impact of Field organisation on data quality is so important that planners of surveys and censuses usually take a lot of time planning and ensuring that it is implemented well to the extent possible. Its main objective is to effectively oversee the field data collection operations of a survey/census.

These operations include but are not limited to:

- Data collection;
- Field editing on the filled questionnaires.
- Control of flow of information from the field to the headquarters and, if necessary, follow-up of any questionnaires that require going back to the field for mandatory corrections; and
- Overall coordination of all other functions associated with field work.

² Licensed by the Petroleum Authority of Uganda

1.2.9 Field supervision and reporting

A great deal of emphasis was placed on data quality throughout the exercise, from planning to questionnaire design, training, supervision, data entry, validation and cleaning/editing.

1.2.10 Data Processing

Data processing is, generally, "the collection and manipulation of items of data to produce meaningful information".

Data processing involved various processes, including:

- Validation Ensuring that supplied data is correct and relevant
- Sorting "arranging items in some sequence and/or in different sets"
- Summarization reducing detail data to its main points
- Aggregation combining multiple pieces of data
- Analysis the "collection, organisation, analysis, interpretation and presentation of data"
- Reporting list detail or summary data or computed information
- Classification separates data into various categories

The electronic data processing method was deployed. All the filled-in questionnaires were entered into the already prepared Excel spread sheet where already prepared formulas have been designed and linked up with the data to produce the needed tables.

1.2.11 Report Writing

The report writing process was spearheaded by the Technical Team (TT) of the Department, which was composed of the staff that had been on the project during implementation. This staff comprised of the HoD Production and Environment Statistics (PES), the Principal Statistician for Industry and Infrastructure Statistics, the Senior Statistician Energy and Infrastructure and Statistician- Energy and Minerals Statistics. Th report was further reviewed by stakeholders for accuracy and completeness.

1.2.12 Dissemination

It is important that statistical data and information are widely disseminated and made readily accessible after it has been processed and analysed. As per UBOS dissemination policy, different media such as the UBOS Annual abstract, the UBOS Website and the Quarterly Press Releases will be used to disseminate the data and information in the report.

1.2.13 Quality Control, Monitoring and Evaluation Plan

Once the returns were received in the office, scrutiny and editing of the data contained in them followed. Any errors and omissions found called for more correspondence or telephone calls in an attempt to obtain complete and correctly filled up returns which are then placed in files and passed on for data entry. After verification, edited data were entered into Ms Excel Sheets where they are processed and, after, the tables are produced.



CHAPTER TWO: REPORT FINDINGS

2.1 Introduction.

This chapter presents the findings on both the Annual and Quarterly Investments, incurred by all the licensed companies in 2023. It also provides information on the extent of National content and the estimated investments.

2.2 Annual Investment

The annual Investment in 2023 increased by 57.6 percent compared to the Investment level in 2022; from 1,241.4 million USD to 1,956.9 Million USD. The total investments increased from 139.6 million USD in 2020 to 547.6 million USD in 2021, which represents a sharp rise of about 292.2 percent. This was partly the impact of the signing of the key commercial agreements for EACOP together with entry of UNOC into the Production Sharing Agreements in April 2021. There after the rate of increment dropped to 126.7 Percent in 2022, when the total investment was 1241.4 million USD as shown in Figure 1 below.



Figure 1: Annual Investments and %age Changes on Investments from 2017 to 2023.

2.3 Quarterly Total Investment

Overall, the guarterly total investment in the Oil and Gas sector in Uganda was on average 80 million USD from Q2 2017 to Q2 2021. Findings further showed that there was a noticeable progressive increment in total quarterly investment in Q3 investment in 2021 with a drastic percentage change in Total Investment of 187.6 percent compared to Q2 2021.

In 2021, there were no Exploration, field development and Oil and Gas Production.

sharp

2020.

The total quarterly Investment in Q4 2023 increased by 39.3 percent compared to the Investment level in Q3 2023. The Total guarterly Investment in Q4 2023 was 672 million USD. The trend in investment from Q2 2021 to Q4 2023 depicts likelihood continuous increment in total quarterly investment in subsequent quarters as seen by the continuous upward trend in the figure below.



Figure 2: Total Quarterly Changes in Investments from Q2 2017 to Q4 2023.

Source: Uganda Bureau of Statistics

2.4 Annual Investment by Cost Category

The Oil and Gas Investment undertaken by companies in the upstream sub sector is majorly in the activities of Exploration, Development and Production. Therefore, it is very important to disaggregate the oil and gas investment statistics under upstream sub sector into those three above listed cost categories as discussed below.

In the preliminary years of Oil and Gas sector in Uganda, investment was mainly in exploration activities. After a number of Oil and Gas discoveries were appraised in 2013-2014, the project activities transitioned from exploration and appraisal to planning for the development of these discoveries. This is why the exploration activity dropped and remained low from 2018-2022.

In the last six years, (2018-2023) investment in Development took centre stage with oil companies investing over 90 percent in Development than other cost categories. In 2023, investment in Development was the highest contributing 99.9 percent of the expenditure as shown in Table 1 below.

		•••				
Year	2018	2019	2020	2021	2022	2023
Exploration	2	5	1	6	9	1.62
%age	0.75	2.15	0.55	1.09	0.72	0.08
Development	265	229	182	545	1,239	1,955.23
%age	99.25	98.28	100.00	99.09	99.36	99.92
Production	0	0	0	0	0	0
Total	267	233	182	550	1,247	1,956.85

Table 1: Annual Investment by Cost Category

Source: Petroleum Authority of Uganda

2.4.1 Annual Expenditure on Exploration Activities

Under exploration, oil companies invested in Direct Exploration Costs, General Administration, Services and National content. From 1998 up to 2002, investment in exploration was gradually increasing until 2002 when it hit a maximum of 19.5 million USD. Then investment in Exploration temporarily dwindled to its lowest in 2006. However, in 2007 there was increased investment in exploration which reached a maximum in 2008 at 50.0 million USD. Thereon, there has generally been minimal investment in Exploration activities with no investments from 2013 to 2017. However, there was increment in Investment in Exploration from 2018, as seen in Figure 3 be-



Source: Uganda Bureau of Statistics

2.4.2 Annual Expenditure on Field Development Activities

Prior to 2020, there was minimal investment in Field Development which kept dwindling in a range below 200 million USD. Most of these were mainly geared toward preliminary stages in development. However, from 2021, there was 517.5 percent increment in investment in the Oil and Gas Sector compared Development Expenditure 2020. There was a total of 1,232 million USD in Field Development in 2023. This investment was inclusive of Direct Field Development, supporting services and General Management and administration. This was 68.9 percentage increment compared to investment in 2022 where investment in Field Development was 729 million USD as shown in Figure 4 below.





Source: UBOS

2.4.3 Annual Expenditure on Mid-stream Activities

Midstream activities in petroleum industry involve the transportation, storage, and wholesale marketing of oil and gas. These set of activities bridge the gap between the developments upstream like exploration and drilling and downstream activities of retailing of Oil and Gas products. Midstream activities in Uganda include the development of the East African Crude Oil Pipeline (EACOP) and investment in construction of the Refinery.

Development in the mid-stream annually was below 150 million USD till 2020 when there was a 39.7 percentage drop in mid-stream developments. In the years preceding 2020, there was a gradual increment in investments in midstream which rose to 129.6 million USD in 2019 when there was 59.4 percentage change compared to 2018 investments in Mid-stream.

From 2021, there was a sustained increase in in mid-stream activities. In 2023, total investment in mid-stream was 723 million USD which was 41.8 percent more compared to investment in mid-stream in 2022. Though the rate of growth in 2022 was about 200 percent compared to that in 2021, there was increased investment in mid-stream though at a slower rate compared to rate of growth in 2022 as seen in Figure 5 below.



Source: UBOS

2.4.4 Annual Expenditure on Production

During this period under review, there were no investment in production activities. This is only natural since no Oil field has entered the production phase yet. However, a total of nine active production licenses have so far been issued to a joint venture of three international oil companies (namely TotalEnergies E&P Uganda, CNOOC Uganda Limited and Uganda National Oil Company) as shown Table 2. It is envisaged that Production of Oil and Gas will be achieved in 2025.

No	Name of Oil Company	Exploration	License
NO.		Area	Period
1	Total Energies E&P Uganda b.v	Tilenga	25 years
	China National Offshore Oil Corporation Uganda (CNOOC)		
2	Limited	Kingfisher1	25 years
3	Oranto Petroleum Limited	Ngassa Shallow	N/A
4	Oranto Petroleum Limited	Ngassa Deep	N/A
5	Armour Energy Uganda Limited	Kanywataaba	N/A
6	Uganda National Oil company (UNOC)	Kasurubani	N/A
7	DGR Global	Turaco	N/A
	Total	9	

Table 2: Summary of Active Production Licenses Issued by duration in 2023

2.5 Total Quarterly Investment by Cost Category

2.5.1 Total Quarterly investments in Exploration activities

Oil and Gas Exploration is an Upstream activity typically includes activities including seismic studies to locate existence of economically viable hydrocarbon deposits in the earth's crust. Total guarterly investment by cost category showed that the highest exploration expenses were incurred during Q2 of 2019 then USD 1.68 million was invested in exploration activities. Thereafter, the exploration activities declined with reduced investments in the subsequent years; though Q1 and Q3 2021, there were significant on 0.79 and 1.18 million USD invested in Exploration respectively. However, in Q4 2023, there was a slight increment of 42.8 percent investment in exploration given by USD 0.48 million invested in exploration.



Figure 6: Total Quarterly investment on exploration activities Q1 2017 to Q4 of 2023

Source: Petroleum Authority of Uganda

From 2017 and much earlier up to Q2 2021, there was modest quarterly investment in Field Development Activities on average of 54.2 million USD. The Field Investment was mainly in Direct Field Development, Services and General & Administration. There are a few spikes in rates change in Field development activities in Q1 2019 followed by a sharp rise in the following Quarter two.

From 2006, when Oil and Gas exploration begun in Uganda, Oil and Gas companies had not embarked in activities of Field development till Q4 of 2021. Preliminary Investment in Field development started much earlier, However, in Q3 of 2021 after

^{2.5.2} Quarterly Expenditure on Field Development Activities

signing of the key commercial agreements, the amount of Investment increased by 190.1 percent. That is from 101.7 million USD in Q4 2021 to 238.9 million USD in Q1 2022. Though there were some drops in the rate of increment in the Investment in Field development in Q2 and Q4 in 2022, there was general consistent growth in the amount of investment in Field Development up to Q4 2023. In Q4 2023, there was USD 671.5 Million invested in Field Development alone showing a growth rate of 39.3 percent as shown in the figure below.





Source: Petroleum Authority of Uganda

The Field Development activities in an Oil and Gas Field are the set of activities undertaken to prepare oil fields in anticipation of production of Oil and Gas. These are done after ascertaining the economic viability of the fields.

In Uganda, there was a modest investment in the Field Development in the years preceding 2021. Investment in Field development was just shy of USD 100 Million. It was in Q3 2021 when went over to USD 107.7 million. From Q4 2021, Quarterly Investment in Field increased tremendously by 190.1 percent. This as a result of investment increasing from USD 101.7 million to USD 295.1 million. Thereafter, there has been nearly quarterly increments every quarter up USD 671.5 million in Q4 2023, which was a 39.3 percent increment compared to Q3 2023. Compared to Q1 2017, the quarterly investment in Q4 2023 was nearly 14-fold and is bound to continue increasing in the subsequent quarters.

2.5.3 Quarterly Expenditure on Mid-stream (Refinery and Pipeline)

In the quarters preceding Q4 2021, there was an average of 28 million USD quarterly investments in the Midstream activities. With a few spikes in investment in Q1 2018 and Q1 2021 when there were percentage changes of 51.7 percent and 117.8 percent respectively. Though there was a notable depression investment in Q1 2020 when there was on 19.6 million USD invested in Midstream causing a depression 39.7 percentage.

However, from Q1 2022, there was increased investment in Midstream causing 200 percent change in investment. This was due 127.5 million USD in midstream activities compared to 42.6 million USD in Q1 2021. From Q1 2023, the trend in investment shows continuous percentage growth in midstream activities; with 287 million USD invested in Q4 2023; which was a 47.9 percentage increase compared to Q3 2023.



Source: Petroleum Authority of Uganda

2.5.4 Quarterly Investment Expenditure on Production

During this reporting period, there was no production of oil and gas, therefore investment related to production activities have not started.

2.6 Estimated Investments

Oil is an economically and strategically crucial resource for many nations due to its basis for a lot of the energy consumed by the World population. Oil and Gas Investors look for specific economic indicators to help them understand future movements in the petroleum industry. Like any commodity market, oil and gas companies and petroleum prices (for the physical and futures markets) are sensitive to inventory levels, production, global demand, interest rate policies and aggregate economic figures such as the Gross Domestic Product (GDP).

Oil and Gas Exploration and Production companies make estimates for future investments for both short term and long projects. As a result, most Government, Private and Oil and Gas Investors among others look out for opportunities to invest in Oil and Gas related activities due to the high returns envisaged. One area that they look out for are Estimated Investments that Oil companies project. These anticipated estimated expenditures are a good source of:

- Anticipated sources of employment for the unemployed
- Anticipated good revenue sources for the tax authority
- Anticipated good contract suppliers for goods and services in the sector
- Anticipated source of Capital mobilizations through the purchase of commodity-based oil Exchange-Traded Funds (ETFs).
- Can be used to evaluate budget and work plan performance

2.6.1 Estimated Investment during the year

In 2023, the findings show that there was an increment in Estimates in projected Expenditure by 20.3 percent compared to the 2022 estimates, from US\$ 1,230.5 Million dollars to US\$ 1,479.7 Million dollars. Further analysis show that the estimates were mainly projected to be made in Field development activities. It also showed that most oil companies had made estimates for Exploration but not for Production, EACOP and Refinery activities as shown in Table 3.

Cost Categories	2017	2018	2019	2020	2021	2022	2023	
Exploration	-	0.58	6.24	2.03	4.69	6.81	16.80	
Development	217.58	194.78	102.06	77.70	422.29	1,223.68	1,462.92	
EACOP	-	-	-	-	-	-	-	
Refinery	-	-	-	-	-	-	-	
TOTAL	217.58	195.37	108.29	79.72	426.99	1,230.49	1,479.71	
%age Changes		-10.2	-44.6	-26.4	435.6	188.2	20.3	

Table 3: Total Yearly Budget Estimates, M	Aillion US\$ 2017 to 2023
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2.6.2 Comparison of Estimated against Actual Investment in Oil and Gas Sector

In comparison to the actual investments during the period, the data showed that generally actual expenditure in Investment was always higher that the estimates made each year.

From 2017 to 2021, the actual investment expenditure was always higher than the estimated (Budgeted). The greatest deviation was by 85.1 percent in 2019. The least deviation was in 2022 when the actual expenditure was just 0.9 percent more than the estimates for the year. In 2023, the actual investment expenditure deviated by 32.3 percent from what was estimated. Whereas there was a deviation of 0.9 percent in 2022 compared to the estimated level of investment amounting to US\$ 1230.5 million. The findings also showed in 2021, there was a 28.3 percent deviation in actual expenditure compared to estimated expenditure of US\$ 427 million as shown in Figure 9 below.







CHAPTER THREE: NATIONAL CONTENT

National Content in Oil and Gas sector is a concept that seeks to define value that Oil and Gas brings to the national economy beyond the direct benefits and revenues that government use to create a sustainable and inclusive economic growth, or it is a concept that seeks to retain the value that Oil and Gas Industry brings, beyond the direct revenues generated by the industry.

Projects can create shared value by generating growing economic opportunities related to their workforce, local supply chain and surrounding communities in ways that also support their bottom line. Therefore, Ugandan National content strategy is aimed at maximizing the use of Ugandan expertise, goods and services.

These are benefits that accrue from the activities of the oil and gas industry for the benefit of the citizens of the country. As the multi-national companies continue to invest in the Oil and Gas sector, they continue to directly or indirectly contribute to the economy in various ways. i.e. employment opportunities, trainings, awarding contracts, skill development, and technology transfer among others.

From 2017 to 2020, the average annual value retained in terms of National Content (*local spend within the year from procurements, salaries including taxes and training*) was about 24.8 million USD. However, in 2021 there was a drastic increase in the total value retained in terms of National content from 20 million USD to 376.3 million USD. This was attributed to mainly with signing of the key commercial agreements in 2021 and taking the Final Investment Decision (FID) between Government of Uganda and the Multi- National Companies to further invest in the Petroleum Resources in the country in 2022. With the substantial increase in the overall total investment, there was a considerable increase in the value retained in terms of National content.

Consequently, there was 1784 percent increase in in the value retained in terms of National content. Though in the subsequent years, the total value retained in terms of National content dropped, it remained significantly higher than it was before the taking of FID. This is mostly attributed to further investment in the sector requiring highly technical and experienced staff which may not easily found in the country. The total value retained in terms of National content by December 2023 was US\$ 214.9 million showing a drop of 76.8 percent from 2022 as shown by the figure below.

Figure 10: Value Retained in terms of National Content in million USD



Source: Petroleum Authority of Uganda

3.1 Annual Employment in the Oil and Gas sub-sector 2017-2023

This section provides information relating to employment in Oil and Gas sector in the country. Employment within the Oil and Gas sub-sector comprises of an aggregate of job opportunities at the licensee level and with contractors at Tier 1, Tier 2 and Tier 3 in the sector. The data is collected at end of the year and provides information related to job opportunity, nationality regardless of the level of the occupations, sex of the labourer.

The Uganda National content strategy is aimed at maximizing the use of Ugandan expertise. Therefore, this sub-section provides information on employment of Ugandans in the oil and gas sector.

The findings show that between 2021 to 2023 over 90 percent Ugandans were employed in the Oil and gas sector. However, in 2019 only 69 percent Ugandans were employed, and this was the lowest percentage recorded in the last seven years.

In 2021, the number of employees increased to 5046, showing a huge percentage increase of 1902.4 percent compared to the number of employees in 2020. In 2022, the number of employees increased by 111.1 percent compared to the number of employees in 2021. This was as a result of the number of employees increasing to a total of 10,651 employees in the Oil and Gas Sector in Uganda. However, the employment rate slowed down in 2023 compared to 2022 though overall number of

persons employed has continuously increased reaching 13,067 individuals in 2023 as shown by the Table below.

	2017	2018	2019	2020	2021	2022	2023
Directly Employed	201	215	193	178	477	804	1018
%age	85.9	64.6	52.0	70.6	9.5	7.5	7.8
Contractors & Subcon-	33	118	178	74	4569	9847	12049
%age	14.1	35.4	48.0	29.4	90.5	92.5	92.2
Total	234	333	371	252	5046	10651	13067
%age Change		42.3	11.4	-32.1	1902.4	111.1	22.6

Table 4: Number of Employees in the Q4 2016 - 2023

Source: Petroleum Authority of Uganda

3.2 Composition of Oil and Gas Workers by sex

From 2017, the percentage of males in the work force was reducing. The least was in 2020 when the percentage of males was 57.1 percent. Though, generally the percentage of males was always higher than females for any particular year. In 2017, 34.6 percent of worker in Oil and Gas were females. This percentage kept gradually increasing and closing up with the percentage of male in the workforce in 2020, when the females were 42.9percent.

However, the difference in the composition begun to widen again in 2021. In 2022, the percentage of Males was 82.1 percent while females were only 17.9 percent of the workers. In 2023, the percentage female workers dropped further down to 16.6 percent and that for males increased to 83.4 percent; widening the gap between males and female employees as seen in the Figure below.



Source: Petroleum Authority of Uganda

3.3 Employment by Occupation and by Nationality as of December 2023

Table below shows the distribution of employment occupations by Nationality from 2018 to 2023. The analysis showed that 94 percent of employees were Ugandans in 2022; which reduced to 90 percent in 2023. It was observed that the overall number 89.9% of total of employees decreased in 2020. However, in 2021, the number of employees in the were Ugandan Oil and Gas companies increased drastically by 1902 percent from 252 persons to 5,046 employee which eventually soared to 10,651 employees in 2022 as shown in the Table 4 below

	Table 0. Employment by Natio	manty nom 20					
		2018	2019	2020	2021	2022	2023
,	Ugandans	246	254	219	4723	9988	11752
tlv	%age Composition	74%	68%	87%	94 %	94%	89.9
employed	Non-Ugandans	87	117	33	323	663	1315
	%age Composition	26%	32%	13%	6%	6%	10.1
	Total	333	371	252	5046	10651	13067
	%age Change	42.31%	11.41%	-32.08%	1902.38%	111.08%	22.7

Table 5: Employment by Nationality from 2018 - 2023

Source: Petroleum Authority of Uganda 3.4 Employment under Licensees

As of 31st

Dec. 2023,

employees

Nationals

The figure below presents employment by nationality of the Oil and Gas workers directly hired by the Licensees in Tier 1. In the years preceding 2022, the number of the nationals employed directly by the Oil and gas companies was more that expatriates. However, from 2023 the number of Ugandans was smaller than expatriates. The total number of employees has progressively been increasing. There were 234 employees in all the Licensees in the Oil and Gas Sector in Uganda. This increased to 333 employees in 2018 which was a 42 percent increment. However, there was a slump in the total number in 2020 when there was a net reduction by 32.1 percent of employees. There on, the total number has consistently been increasing up to 1018 directly employees which was a 26.6 percent increment compared to number of employees in 2022 as seen I Appendix Table F.

In 2017, there were 234 employees directly employed by licensees. Amongst the employees, there were 208 Ugandans amongst them constituting 88.9 percent of the workforce and only 26 expatriates constituting 11.1 percent. The percentage of Ugandans kept gradually dwindling up to 2022 when the composition was 72.5 and 27.5 percent for nationals and Expatriates respectively. In 2023, amongst the 1018 directly employed workers by Licensees, expatriates were 32.3 percent and Ugandans were 67.7 percent. The proportion of Ugandans in the workforce steady decreasing while the proportion of Expatriates is steadily growing as shown in the Figure 13 below.



Figure 12: Direct employment by Licensees by Nationality

3.6 Expenditure on National content

National content in the oil and gas sector in Uganda broadly focuses on involving participation of citizen in the sector. This is achieved through Training and building capacity for citizens, Technology transfer, Employment and Service provision as listed below:

List of goods and services to be provided by Ugandan companies, Ugandan citizens and registered entities:

(a) Transportation.

(b) Security.

(c) Foods and beverages.

activities with 10.1%

As of 31st

Dec. 2020, female

employees dominated

the support

service

(d) Hotel accommodation and catering.

- (e) Human resource management.
- (f) Office supplies.
- (g) Fuel supply.
- (h) Land surveying.
- (i) Clearing and forwarding.
- (j) Crane hire.
- (k) Locally available construction materials.
- (I) Civil works.
- (m) Supply of locally available drilling and production materials.

Source: Petroleum Authority of Uganda

- (n) Environment studies and impact assessment.
- (o) Communications and information technology services.
- (p) Waste management, where possible

3.7 Number of Oil and Gas contracts awarded by Nationality

From 2017 to 2020, the number of contracts on the Oil and Gas Sector was steadily reducing. In 2017, there were 735 contracts won by companies, 534 were awarded to Ugandan Companies. This was 72.7 percent of the awarded that year. In 2020, the number of contracts was the least, only 413 were available, 90 percent of these were won by Uganda companies and 9.9 percent was awarded to foreign companies.

However, from 2021, the number of Contracts began to increase. There were 553 Contracts awarded, which was an increase of 33.9 percent increment compared to the number of contracts in 2020. Ugandan companies won 94.9 percent of these contracts. In 2022, the number of contracts soared by 68.2 percent and 88.2 percent of these contracts in 2022 were won by local companies in Uganda as shown in the Table 6 below.

	2017	2018	2019	2020	2021	2022	2023
Foreign Companies	201	54	55	41	28	110	132
%age Composition	27.3	7.8	8.6	9.9	5.1	11.8	15.4
Ugandan Companies	534	637	583	372	525	820	720
%age Composition	72.7	92.2	91.4	90.1	94.9	88.2	84.5
Total	735	691	638	413	553	930	852
%age Change		-6	-7.7	-35.3	33.9	68.2	-8.4

Table 6: Contracts in Oil and Gas Sector

Source: Petroleum Authority of Uganda

3.8 Value of contracts awarded by Nationality

Table 7 presents statistics on the overall value of contracts awarded in the sector and those awarded to Ugandan and foreign companies from 2017-2023. Overall, the value of contracts awarded registered an increase of 173.5 percent in 2022 as compared to 2021 (from USD 1,203 Mn in 2021 to 3,289 Mn 2022). Similarly, the value of contracts awarded to Ugandan companies increased by 95.5 percent in 2021 as compared to 2020 (from USD 12.98 Mn to USD 1,149 Mn). This was attributed to the increment in Field development expenditure and also to National content in the field development and investment preparation production cost activity categories. However, there was a drop 84.7 percent in 2023 compared to the overall value of contracts awarded in 2022.

	2017	2018	2019	2020	2021	2022	2023					
Foreign Companies	50.96	15.45	1.14	1.07	53.75	2,709.03	243.4					
%age	74.4	35.5	5.3	7.6	4.5	82.4	48.5					
Ugandan Companies	17.52	28.1	20.24	12.98	1,148.86	579.98	257.8					
%age	25.6	64.5	94.7	92.4	95.5	17.6	51.4					
Total Value	68	44	21	14	1,203	3,289	501.2					
%age Changes		-36.4	-50.9	-34.3	8,465.60	173.5	-84.7					

Table 7: Value of contracts awarded in Million USD, from 2017 to 2023 by nationality

Source: Petroleum Authority of Uganda

3.9 Companies registered in National Supplier Database (NSD)

Analysis of the number of businesses in the National Supplier Database, it was found that in 2018, there were 1,752 companies registered in NSD. This included a net addition of 1,239 companies. Whereas in 2019, there was a net change of 151 fewer companies. This was due to more companies failing to renew than new companies registering. While in 2022, the net change in the number of businesses in NSD was 302 fewer companies (a net exit). This reduction represented an 11.2% decrease from the 2021 figure. However, In 2023, there was a significant resurgence net change 547 more companies (a net increase) which was increment represented a 22.8% rise compared to 2022. This breakdown provides clarity on the year-to-year changes and the overall trend in company registrations in the NSD for the Oil and Gas sector.





The Companies on the NSD are in the 17 economic major sectors. From 2019 to 2023, following some sectors have the largest number of Companies on the National Supplier Database: Manufacturing, Construction, Professional, Scientific and Technical Activities and Other Service Activities. In 2023, the Companies in

Source: Petroleum Authority of Uganda

Construction sector consituted 16.1 percent followed by those in Professional, Scientific and Technical Activities making 15.6 percent, then Manufacturing 13.4 percent and Other Service Activities 9.9 percent as shown in the Appendix E.

3.10 Capacity Development (Building) of Ugandans

The companies participating in the development of the Oil and Gas resources design programmes for capacity building of the civil servants, workers and communities in the management of the petroleum resources. The purpose of which is to develop and strengthen the managerial skills in the Oil and Gas economy.

In 2018, there were nine civil servants trained in the management of Oil and Gas resources. This number has over the years increased steadily. In 2021, there were seventy-six staff in government and Local government whose skills were enhanced in the various areas of Oil and Gas. This was 81.1 percent increment compared to the number trained in 2021. This capacity development is undertaken either within the country where there is capacity to do so available or abroad when there are specialised skills to be passed to civil servants.



Figure 14: Training conducted by Oil and Gas Companies

3.11 Cost of training conducted by Oil and Gas Companies

The cost of training and enlightening citizens on the importance and management of the Oil and resources in Uganda has been changing over time depending on the field activity at a particular time. Generally, there has been a noticeable increment in the cost in conducting out these activities.

Source: Petroleum Authority of Uganda

In 2017, the total cost of training was USD 242,898. which was increased to USD: 730,145 in 2018 reflecting 200 percent increase. The number of resources allocated for trainings dwindled to its lowest in 2020 only when then only USD 666,985 was allocated for the exercise. However, from 2021 the amount resources spent on trainings increased significantly by over 258 percent. This figure further rose by 236 percent in 2022, to USD 8.05 Million dollars. In 2023, resources allocated for training only increased by 1.7 percent as shown in the table below. All these trainings were funded to build local capacity to manage the anticipated Oil and Gas resources in the nearest future.

	ganaane						
	2017	2018	2019	2020	2021	2022	2023
Public Officers	-	321,320	218,135	378,572	561,173	1,672,280	709,668
Annual %ages Licensees and Contractors	- 242,898	44.0 185,363	28.9 232,060	56.8 145,359	23.5 305,727	20.8 4,715,684	8.7 6,000,629
Annual %ages Other Ugandans	100.0 -	25.4 223,462	30.8 303,825	21.8 143,054	12.8 1,523,579	58.6 1,657,533	73.3 1,470,831
Annual %ages	-	30.6	40.3	21.4	63.7	20.6	18.0
Total Cost	242,898	730,145	754,020	666,985	2,390,479	8,045,497	8,181,128
%age Changes		200.6	3.3	(11.5)	258.4	236.6	1.7

Table 8: Categories of Ugandans Trained

CHAPTER FOUR SUMMARY, CHALLENGES, CONCLUSION AND RECOMMENDATIONS 4.1 Summary of findings

The main finding of the report include:

- The total Annual Investment in 2023 increased by 57.6 percent compared to the Investment in 2022. Total investment increased 1,241.4 million dollars to 1,956.9 million dollars in the reporting period. This increment in investment is attributed to the signing of the Final Investment Decision (FID) by the Government of Uganda and the licensed production companies in February 2022. This means, therefore, that companies is making more investment in preparation for production to start in 2025.
- A total of 1,018 workers were employed directly by the Licensees in the Oil and Gas sub-sector in 2023. There were 329 Ugandans constituting 32.3 percent and Expatriated were 67.7 percent of the work force. It has been noted that as the investment moves closer to production phase, the percentage of Ugandan workers directly employed by Licensees is dropping (from 88.9% in 2017 to 32.3 percent in 2023) while the proportion on Expatriated in increasing (from 11.1% in 2017 to 67.7 % in 2023).
- Generally, the percentage of males in the workforce was always higher than females for any particular year. In 2017, 34.6 percent of worker in Oil and Gas were females. This percentage kept gradually increasing and closing up with the percentage of male in the workforce in 2020, when the females were 42.9percent.
- In 2023, the percentage female workers dropped further down to 16.6 percent and that for males increased to 83.4 percent; widening the gap between males and female employees
- It was noticed that from 2017 to 2021, the actual investment expenditure was always higher than the estimated (Budgeted). The greatest deviation was by 85.1 percent in 2019. In 2023, the actual investment expenditure deviated by 32.3 percent from what was estimated. Whereas there was a deviation of 0.9 percent in 2022 compared to the estimated level of investment amounting to USD 1,230.5 million.

• In the last 7 years, the value of contracts awarded to Ugandan companies stood at 1.7 billion US dollars.

4.2 Challenges

The challenges faced in collecting and analysing data for Uganda's Oil and Gas Sector report highlight several critical areas for improvement:

Timeliness: Consistency in data submission is essential, yet data often arrived two quarters late instead of on a quarterly basis. This delay hampers timely analysis and responsiveness.

Data Access: The sophisticated nature of the Oil and Gas industry creates challenges in data accessibility. Some companies were unresponsive, failing to provide requested data despite multiple follow-ups, even though they understand the value of such data for sectoral insights.

Scope Limitations: The data collection focused only on Tier 1 licensees, leaving gaps in understanding the broader participation of Ugandans in the sector. This limited scope prevents comprehensive insights into the extent of Ugandan involvement, both direct and indirect.

Data Set Discrepancies: The Uganda Bureau of Statistics (UBOS) used an internally developed questionnaire for data collection. However, inconsistencies were noted when comparing these data sets with similar datasets from other government agencies, suggesting a need for harmonization across reporting bodies.

Addressing these issues would strengthen the accuracy and comprehensiveness of future reports, ultimately supporting better-informed policy and strategic decisions in Uganda's Oil and Gas Sector.

4.3 Conclusions

The recent report on Uganda's Oil and Gas Sector reveals a significant post-Final Investment Decision (FID) surge, with the investment rate peaking at an impressive 292.2% in 2022. By 2023, investment totalled over USD 1.96 billion, leading to a massive 1902% increase in employment within the sector. Notably, 94% of these employees were Ugandans, highlighting a strong push for local labour integration. However, despite this high percentage of Ugandan workers, there is a concerning trend: the share of Ugandan employees has steadily dropped to 67.7% while expatriate staff increased to 32.7%.

The gender composition within the workforce has also shifted. In 2020, employment was more balanced with 57.1% male and 42.9% female employees. However, the employment gap widened after investment increased in 2021, resulting in an imbalance by 2023, with 83.4% male and only 16.6% female representation.

In terms of national content, Ugandan companies constitute a notable 84.5% of those participating in the sector, with 720 companies out of 852 actively involved. However, their contracts account for just 51.4% of the total contract value for goods and services. This gap suggests that, while Ugandan companies are prevalent, the economic impact they gain from these contracts is limited compared to foreign entities.

Given these insights, the report recommends that the government enhance efforts to equip Ugandans and local companies with skills and competencies in the Oil and Gas Sector. This would ensure that more of the benefits from these resources remain within Uganda. Furthermore, while the investment growth is promising, its benefits have been largely confined to regions directly hosting development projects. Accelerating the final stages toward actual oil and gas production could create more tangible, GDP-boosting benefits for the wider Ugandan population.

4.4 Recommendations

- To increase on the response rates, there is need for more public sensitisation and awareness creation to emphasize the importance and objectives of Oil and Gas Statistics. Further, there is need for more stakeholder engagement and training to improve on the accuracy of the data provided.
- There is need to enhance staff capacity to develop data collection instruments and analytical skills for the Midstream, Downstream and National/National content sub-sectors for Oil and Gas Statistics for better reporting in the sector.
- There is need for a joint capacity building in data management and reporting for players involved in Oil and Gas value chain.
- There is need to build synergies among the key players in the Oil and Gas sector in the country.

APPENDICES

Appendix Table A: Annual Oil and Gas Investment Statistics (USD:000,000)

Cost category (USD:000,000,)	2017	2018	2019	2020	2021	2022	2023
Exploration	0.10	0.85	3.77	0.79	2.99	1.87	1.62
Development	155.07	156.14	67.00	60.62	374.32	729.48	1,232.23
Production	-	-	-	-	-	-	-
EACOP	72.03	109.28	129.65	28.21	120.31	500.00	723.00
Refinery	-	-	-	50.00	50.00	10.00	-
Total	227.20	266.27	200.42	139.62	547.62	1,241.35	1,956.85
Percentage Change		17.20	-24.73	-30.33	292.22	126.68	57.64

Appendix Table B: Quarterly Oil and Gas Investment Statistics (USD:000,000)

Cost cat	egory (USD:000,000)	Exploration	Development	Production	EACOP	Refinery	Total
2017	Q1	0.02	31.58	0.00	18.01	0.00	49.61
	Q2	0.02	36.65	0.00	18.01	0.00	54.69
	Q3	0.02	36.11	0.00	18.01	0.00	54.14
	Q4	0.02	50.73	0.00	18.01	0.00	68.76
2018	Q1	0.21	45.35	0.00	27.32	0.00	72.89
	Q2	0.21	35.21	0.00	27.32	0.00	62.74
	Q3	0.21	31.63	0.00	27.32	0.00	59.17
	Q4	0.21	43.94	0.00	27.32	0.00	71.48
2019	Q1	0.55	0.00	0.00	32.41	0.00	32.96
	Q2	1.68	22.73	0.00	32.41	0.00	56.82
	Q3	0.96	24.34	0.00	32.41	0.00	57.72
	Q4	0.58	19.93	0.00	32.41	0.00	52.93
2020	Q1	0.06	11.45	0.00	7.05	12.50	31.07
	Q2	0.11	9.32	0.00	7.05	12.50	28.99
	Q3	0.12	11.42	0.00	7.05	12.50	31.09
	Q4	0.50	28.43	0.00	7.05	12.50	48.48

Cost ca	tegory (USD:000,000)	Exploration	Development	Production	EACOP	Refinery	Total
2021	Q1	0.79	17.74	0.00	30.08	12.50	61.10
	Q2	0.18	44.92	0.00	30.08	12.50	87.68
	Q3	1.18	59.13	0.00	30.08	12.50	102.89
	Q4	0.84	252.53	0.00	30.08	12.50	295.94
2022	Q1	0.51	111.43	0.00	125.00	2.50	239.44
	Q2	0.45	213.86	0.00	125.00	2.50	341.80
	Q3	0.47	155.66	0.00	125.00	2.50	283.63
	Q4	0.45	248.53	0.00	125.00	2.50	376.48
2023	Q1	0.52	282.70	0.00	101.00	0.00	384.22
	Q2	0.28	276.85	0.00	141.00	0.00	418.14
	Q3	0.33	288.19	0.00	194.00	0.00	482.53
	Q4	0.48	384.48	0.00	287.00	0.00	671.96

Appendix Table C: Annual Estimated Budget and Actual Investment (Million USD)

	Explo	ration	Field Dev	elopment	То	Fotal .			
	Estimated Budget	Actual Expenditure	Estimated Budget	Actual Expenditure	Estimated Budget	Actual Expenditure	Percentage Deviation (%)		
2017	0	0.1	217.58	227.1	217.58	227.2	4.4		
2018	0.99	1.14	194.38	265.05	195.37	266.19	36.2		
2019	6.24	3.77	102.06	196.65	108.3	200.42	85.1		
2020	2.03	0.79	77.7	138.83	79.73	139.62	75.1		
2021	4.69	2.99	422.29	544.62	426.98	547.61	28.3		
2022	6.81	1.87	1,223.68	1,239.48	1230.49	1241.35	0.9		
2023	16.8	1.62	1,463	1,956	1479.8	1957.62	32.3		

Appendix Table D: National Content Values by different indicators

Indicators	Total	2017	2018	2019	2020	2021	2022	2023
National Content Value (USD)	1,666,777,703	24,161,277	24,740,917	30,245,035	19,971,991	376,332,988	925,440,781	214,884,714
Use of Locally Available Goods								
No. of contracts awarded	4,812	735	691	638	413	553	930	852
Number of Contracts awarded to Ugandan Compa- nies	4,191	534	637	583	372	525	820	720
Number of Contracts awarded to communities	107	9	16	14	13	16	16	23
Percentage of Contracts to Ugandan Suppliers (%)	87.1	72.7	92.2	91.4	90.1	94.9	88.2	84.5
Value of contracts awarded	5,140,245,828	68,482,059	43,547,583	21,375,661	14,044,212	1,202,611,845	3,289,008,713	501,175,754
Value of contracts awarded to Ugandan Companies	2,065,468,298	17,521,133	28,100,850	20,240,453	12,978,949	1,148,860,403	579,980,919	257,785,592
Value of Contracts to Ugandan Suppliers (%)	40.2	25.6	64.5	94.7	92.4	95.5	17.6	51.4
Value of contracts awarded to Communities	16,514,043	7,199	154,053	153,731	97,333	633,198	1,308,639	14,159,890
Total Number of Companies Tier 1	697	325	257	236	121	194	322	189
Number of Ugandan Companies Tier 1	551	197	228	192	101	186	293	156
Total Number of Companies Tier 2	1,693							1,693
Number of Ugandan Companies Tier 2	1,631							1,631
Number of Community suppliers	56	6	12	10	9	16	7	13

Indicators	2017	2018	2019	2020	2021	2022	2023
Number of Companies Registered in National Supplier Data Base (cumulative)	513	1,752	1,601	1,967	2,702	2,400	2,947
Number of Ugandan Companies in National Supplier Data Base (cumulative)	378	1,237	1,142	1,385	1,958	1,866	2,343
Number of Foreign Companies in National Supplier Data Base (cumulative)	135	515	459	582	744	534	604
Sectors registered in National Supplier Data Base (NSD)							
Agriculture, Forestry and Fishing			23	30	45	49	59
Mining and Quarrying			72	83	99	75	87
Manufacturing			189	232	297	320	393
Electricity, Gas, Steam and Air Conditioning Supply			34	40	59	62	87
Water Supply; Sewerage, Waste Management and Remediation Activities			27	35	51	44	47
Construction			220	273	405	392	474
Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles			71	85	117	127	184
Transportation and Storage			144	163	234	174	201
Accommodation and Food Service Activities			49	70	113	97	117
Information and Communication			107	132	167	129	183
Financial and Insurance Activities			41	49	70	63	61
Real Estate Activities			19	32	45	50	48
Professional, Scientific and Technical Activities			290	364	489	376	459
Administrative and Support Service Activities			59	66	80	73	101
Public Administration and Defence; Compulsory Social Security			1	2	3	2	3
Education			24	22	29	23	24
Human Health and Social Work Activities			44	53	84	82	95
Arts, Entertainment and Recreation			1	6	9	9	17
Other Service Activities			185	229	303	246	289
Activities of households as employers; undifferentiated goods- and services- producing activities of households for own use			1	-	1	2	3
Activities of Extraterritorial Organizations and Bodies			-	1	2	5	5
Suppliers in Unspecified sector							10

Appendix Table E: National Supplier Database by Economic Sectors

Appendix Table F: Employment by different Thematic areas

Indicators	Total	2017	2018	2019	2020	2021	2022	2023
Employment								
Total number of persons employed		234	333	371	252	5,046	10,651	13,067
%age Growth			42.3	11.4	-32.1	1902.4	111.1	22.7
Ugandans Employed		208	246	254	219	4,723	9,988	11,752
Expatriates Employed		26	87	117	33	323	663	1,315
Employment under Licensees-Total		234	333	371	252	477	804	1,018
%age Growth			42.3	11.4	-32.1	89.3	68.6	26.6
Ugandans		208	246	254	219	336	583	689
Expatriates		26	87	117	33	141	221	329
Community employment							3,388	4,442
Gender Male (%)		65.38	61.38	61.42	57.08	63.58	82.11	83.37
Gender Female (%)		34.62	38.62	38.58	42.92	36.42	17.89	16.63
Total Spend	377,026,016	20,786,966	33,352,939	48,311,942	19,228,403	22,878,018	59,142,912	173,324,836
Spend on Ugandans	75,404,496	6,813,868	5,853,721	10,571,313	5,488,082	5,656,274	9,808,461	31,212,776

Appendix Table G: Economic Sectors of Businesses in National Supplier Database (NSD)

Economia Soctora	2019		2020		2021		2022		2023	
Economic Sectors	Number	%age								
A-Agriculture, Forestry and Fishing	23	1.4	30	1.5	45	1.7	49	2	59	2
B-Mining and Quarrying	72	4.5	83	4.2	99	3.7	75	3.1	87	3
C-Manufacturing	189	11.8	232	11.8	297	11	320	13.4	393	13.4
D-Electricity, Gas, Steam and Air Conditioning Supply	34	2.1	40	2	59	2.2	62	2.6	87	3
E-Water Supply; Sewerage, Waste Manage- ment and Remediation Activities	27	1.7	35	1.8	51	1.9	44	1.8	47	1.6
F-Construction	220	13.8	273	13.9	405	15	392	16.4	474	16.2
G-Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	71	4.4	85	4.3	117	4.3	127	5.3	184	6.3
H-Transportation and Storage	144	9	163	8.3	234	8.7	174	7.3	201	6.9
I-Accommodation and Food Service Activities	49	3.1	70	3.6	113	4.2	97	4.1	117	4
J-Information and Communication	107	6.7	132	6.7	167	6.2	129	5.4	183	6.2
K-Financial and Insurance Activities	41	2.6	49	2.5	70	2.6	63	2.6	61	2.1
L-Real Estate Activities	19	1.2	32	1.6	45	1.7	50	2.1	48	1.6
M-Professional, Scientific and Technical Activ- ities	290	18.1	364	18.5	489	18.1	376	15.7	459	15.7
N-Administrative and Support Service Activi- ties	59	3.7	66	3.4	80	3	73	3.1	101	3.4
O-Public Administration and Defense; Com- pulsory Social Security	1	0.1	2	0.1	3	0.1	2	0.1	3	0.1
P-Education	24	1.5	22	1.1	29	1.1	23	1	24	0.8
Q-Human Health and Social Work Activities	44	2.8	53	2.7	84	3.1	82	3.4	95	3.2
R-Arts, Entertainment and Recreation	1	0.1	6	0.3	9	0.3	9	0.4	17	0.6
S-Other Service Activities	185	11.6	229	11.6	303	11.2	246	10.3	289	9.9
TOTAL	1600	100	1966	100	2699	100	2393	100	2929	100
Annual %age Change			22.9		37.3		11.3		22.4	0.8

No.	License	License Operator	PSA	Contract Area	License From Date	Expected Ex- piry	License Type	License Periods
1	PL-08/2016	Total E&P Uganda b.v	PSA-01/2004	Contract Area 1	8/30/2016	8/30/2036	Production	25 years
2	PL-07/2016	Total E&P Uganda b.v	PSA-01/2004	Contract Area 1	8/30/2016	8/30/2036	Production	25 years
3	PL-06/2016	Total E&P Uganda b.v	PSA-01/2004	Contract Area 1	8/30/2016	8/30/2036	Production	25 years
4	PL-05/2016	Tullow Uganda Operations Pty Limited	PSA-01/2001	Contract Area 2	8/30/2016	8/30/2036	Production	25 years
5	PL-04/2016	Tullow Uganda Operations Pty Limited	PSA-01/2001	Contract Area 2	8/30/2016	8/30/2036	Production	25 years
6	PL-03/2016	Tullow Uganda Operations Pty Limited	PSA-01/2001	Contract Area 2	8/30/2016	8/30/2036	Production	25 years
7	PL-02/2016	Tullow Uganda Operations Pty Limited	PSA-01/2001	Contract Area 2	8/30/2016	8/30/2036	Production	25 years
8	PL-01/2016	Tullow Uganda Operations Pty Limited	PSA-01/2001	Contract Area 2	8/30/2016	8/30/2036	Production	25 years
9	PL-01/2013	CNOOC Uganda Limited	PSA-02/2004	Contract Area 3A	9/16/2013	16/09/2043	Production	30 years
10	PL-01/20**	Uganda National Oil Company (UNOC)	PSA-01/20**	Kasurubani			Exploration	
11	PL-01/20**	DGR Global	PSA-02/20**	Turaco			Exploration	

Appendix Table H: List of Active Production Licenses Issue to Operators from 2016 to 2022

Source: Petroleum Authority of Uganda

Appendix Table I: Estimates and Actual Investment by Cost Category, Million US\$, 2017 to 2023

Cost Category	2017	2017	2018	2018	2019	2019	2020	2020	2021	2021	2022	2022	2023	2023
	Budget	Actual	Budget	Actual	Budget	Actual								
Exploration	0.00	0.10	0.99	1.14	6.24	3.77	2.03	0.79	4.69	2.99	6.81	1.87	16.80	1.62
Field Development	217.58	227.10	194.38	265.05	102.06	196.65	77.70	138.83	422.29	544.62	1,223.68	1,239.48	1,463	1,956
Production														
Total	217.58	227.20	195.37	266.20	108.29	200.42	79.72	139.62	426.99	547.62	1230.49	1241.35	1,480	1,958

Appendix Table J: Quarterly Estimated Investment by Cost Category, US\$, Million 2017-2022

Cost Catagory	2017	2017	2017	2017	2018	2018	2018	2018	2019	2019	2019	2019	2020	2020
Cost Calegory	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
Exploration	0.02	0.02	0.02	0.02	0.34	0.29	0.38	0.13	0.55	1.68	0.96	0.58	0.06	0.11
Field Development	49.59	54.66	54.11	68.74	72.55	62.45	58.79	71.34	32.41	55.14	56.75	52.34	31	28.88
Production														
Total	49.61	54.69	54.14	68.76	72.89	62.74	59.17	71.48	32.96	56.82	57.72	52.93	31.07	28.99

Source: Petroleum Authority of Uganda

Cost Category	2020	2020	2021	2021	2021	2021	2022	2022	2022	2022	2023	2023	2032	2023
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Exploration	0.12	0.5	0.79	0.18	1.18	0.84	0.51	0.45	0.47	0.45	0.52	0.28	0.33	0.48
Field Development	30.97	47.98	60.31	87.5	101.71	295.1	238.93	341.36	283.16	376.03	383.7	417.9	482.2	671.5
Production														
Total	31.09	48.48	61.1	87.68	102.89	295.94	239.44	341.8	283.63	376.48	384.22	418.18	482.53	671.98

	Exploration	Field Development	Pipeline	Refinery	Annual Investment
1998	0.0	3.0			3.0
1999	0.0	0.2			0.2
2000	0.0	0.3			0.3
2001	0.0	4.1			4.1
2002	0.0	5.0			5.0
2003	0.0	15.1			15.1
2004	0.0	20.0			20.0
2005	0.0	12.0			12.0
2006	0.0	46.0			46.0
2007	0.0	126.0			126.0
2008	0.0	277.9			277.9
2009	0.0	265.9			265.9
2010	0.0	298.5			298.5
2011	0.0	319.5			319.5
2012	0.0	498.0			498.0
2013	0.0	461.3			461.3
2014	0.0	429.9			429.9
2015	0.0	166.6			166.6
2016	0.0	98.5			98.5
2017	0.1	155.1	72.0	0.0	227.2
2018	0.9	156.1	109.3	0.0	266.3
2019	3.8	67.0	129.6	0.0	200.4
2020	0.8	60.6	28.2	50.0	139.6
2021	3.0	374.3	120.3	50.0	547.6
2022	1.9	729.5	500.0	10.0	1241.4
2023	1.6	1232.2	723.0	0.0	1956.8

Appendix Table K: Historical data by Cost Category, US\$, Million 1998-2023

Appendix Table L: Oil and Gas Questionnaire 2023

		CONFIDENTIAL
UGANDA BUREAU OF STATIST	ICS	THE REPUBLIC OF LIGANDA
Oil & Gas Investment Statistics Quarterly Question	onnaire	
Name of the Operator:	This c follow	uestionnaire collects information for the ing periods:
	Accru	Jed expenditure for;
Operator's TIN:	Oct -	Dec, 2023
Purpose of the Survey		
information for monitoring the petroleum sector. This information is used for statistical purposes in describing the structure, behavior and performance of various oil & gas act addition to shaping effective public policy.	• Jan- tivities in • Apri • Cale	Mar 2023 I - Dec 2023 nder year 2024
Authority		
The information is collected under the provisions of the Uganda Bureau of Statistics Act, 19	998.	Please help us to
Confidentiality		monitor economic
The information provided on this form will remain strictly confidential as per the Uganda Burea	au	dovelopment
of Statistics Act, 1998.		development
Help		
For any questions or clarifications, please contact:	Thic c	uestionnaire has been delivered by:
Ine near of Department, Production & Environment Statistics,		destionnalle has been delivered by.
P. O. Box 7186, Kampala.	Interv	iewers Name and Signature
Tel: 256 – 414 – 70600017		
Fax: 256 – 414 – 237553	Telep	hone Contact:
Email: ubos@ubos.org		
Website: www.ubos.org		

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Part 1: Exploration	Sheet 8

GUIDELINES

REQUIRED INFORMATION

The information required to fill out this questionnaire includes;

- 1. General information related to the activities, ownership and employment of the company.
- 2. Accrued investment expenditure incurred by the Operator of each License.
- 3. Estimated expenditure to be incurred by the Operator of each License.

COMPOSITION OF THE QUESTIONNAIRE

The Questionnaire is made up of two major sections; Section 1 and 2.

Section 1

This Section seeks to capture information related to the company as a whole.

It is subdivided into;

Part 1: Location and Contact details

Part 2: Activities of the Business

Part 3: Ownership of the Business

Part 4: General Information on Employment and Staff Costs

All parts of this section are to be filled out by all companies.

Section 2

This section seeks to capture information related to each License held by the company i.e. Exploration and/or Production Licenses.

It is subdivided into;

Part 1: Exploration - This is to be filled out in relation to an Exploration License.

Part 2: Pre development - This is to be filled out in relation to a Production License.

Part 3: Field development - This is to be filled out in relation to a Production License.

Part 4: Production - This is to be filled out in relation to a Production License.

WHO SHOULD COMPLETE THIS QUESTIONNAIRE?

The Managing Director or a designated representative for the Operator of the specified License should fill the questionnaire.

IN NEED OF ASSISTANCE?

Incase you need guidance on how to complete this questionnaire, do not hesitate to contact; The Director Business and Industry Statistics on 0414-706017/0414-706017/0711-706017.

WILL THERE BE ANY FEEDBACK?

Yes. The Survey results will be posted on the following website http://www.ubos.org. These results will be disseminated in aggregated form to ensure confidentiality. This will ensure that inference cannot be made about individual companies.

NOTE:

If you encounter problems, and/or are uncertain of any terms or have questions, please call or email for clarification.

THANK YOU FOR YOUR CONTINUED COOPERATION

SECTION 1

PART 1 : LOCATION PARTICULARS AND CONTACT INFORMATION

Name of the Company:	
District:	
Street name:	
Plot no:	
Name of Respondent:	
Title of Respondent:	
Office contact:	
Email address:	
Date:	
Respondent's Signature:	

PART 2: ACTIVITIES OF THE COMPANY

		ISIC CODE
What is the Main	activity of the Company?	
	activity of the company.	
What are the oth	er (secondary) activities of the company?	
what are the out	ier (secondary) activities of the company?	
1		
2		
•		
3		

Please specify the number of separate establishments / branches covered by this return

If the company has more than one establishment / branch, please give details and show the number of employees in each establishment / branch.

	Name	Main activity	Location District Name	Paid employees (as at the time of the interview)
1				
2				
3				
4				

PART 3: OWNERSHIP OF COMPANY

Please specify the legal ownership of this company

Please specify the current ownership of the company by percentage distribution

(These figures should add up to 100%)

	Percentage owned	Nearest whole number
by Government		
by Nationals	Resident	
	Non-resident	
by Non-nationals	Resident	
	Non-resident	

Please specify the year the company started operating in the country

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by Nationals	Resident	
	Non-resident	
by Non-nationals	Resident	
	Non-resident	

Please specify the year the company started operating in the country

PART 4: GENERAL INFORMATION ON EMPLOYMENT

	Directorate / Division	Section	Nationals			Non-nationals		Sex			Vacant Position
			Permanent	Temporary	Casual	(less than 12	(more than 12	Male	Female	Total	
			1	2	3	4	5	6	7	8	
1	Management	Managing Director / CEO / President									
		Vice President / Director									
2	Administration	Personnel / Human Resource									
		Finance									
		Accounting									
		Legal									
		Information Systems								1	
		Support services									
3	Exploration	Geophysical / Geological									
		Land									
4	Drilling and Production	Drilling Operations									
		Production Operations									
5	Engineering	Engineers									
		Technicians									
		Architects									
6	QHSE										
7	Joint Venture										
	TOTAL										

Please specify the number of persons employed in the company during the period 1st October - 31st December, 2022.

	Code	National Office (000 USD)	Headquater Office (000 USD)		
Gross payments to staff					
Salaries and wages	W111				
Directors' fees & allowances	W112				
Other Cash allowances (including travel allowances)	W1130				
Overtime and bonuses	W1131				
Total Other Cash allowances = (W1130+W1131)	W113				
Total cash payments = (W111+W112+W113)	W11				
Benefits in kind					
Rent paid for housing	W120				
Meals or meal subsidies	W121				
Medical expenses	W122				
Staff welfare costs	W123				
Other Benefits in kind	W124				
Total benefits in kind (w120+w121+w122+w123+w124)	W12				
Social Security					
Contributions to NSSF or other schemes	W130				
Retirement benefit provisions	W131				
Total Social Security = (W130+ W131)	W13				
Overall Cost = (w11+w12+w13)	W1				

Please specify the total cost of staff expenses for the period of 1st October - 31st December, 2023.

Please specify the total company expenses for the period of 1st October- 31st December, 2022 that are not billable to a License.

Please specify the total estimates of company expenses that are not billable to a License for the following periods.

1st Jan - 31st Mar, 2023	000 USD
1st April - 31st Dec, 2023	000 USD
Calendar year 2024	000 USD

000 USD

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