

EEEGL

ENTERPRISE ENVIRONMENT AND EQUITY IN THE VIRUNGA LANDSCAPE OF THE GREAT LAKES

ENTERPRISE NETWORK MAPPING STUDY IN SOUTH WEST UGANDA

Habib Tibrichu



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Program Contacts

EEEGL Regional Coordination Office

Regional Programme Coordinator
EEEGL Programme
CARE INTERNATIONAL
Kachiru, Kigali B.P. 550
Kigali, Rwanda
Tel: + 250 58 31 47/ 48/ 49

IGCP

International Gorilla Conservation Programme (IGCP)
|AWF, FFI & WWF)
Off UMUGANDA BOULEVARD
Opp. the Office of the General Prosecutor
P.O. Box 931, Kigali, RWANDA
Tel: +250 580465 | (fax) +250 580466

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ACRONYMS

EEEGL	Enterprise, Environment, & Equity in the Virunga Landscape of the Great Lakes
BDS	Business Development Services
NRM	National Resource Management
ENM	Enterprise Network Mapping
NGO	Non Governmental Organization
CSO	Community Based Organization
VSLA	Village Savings and Loans Association
DRC	Democratic Republic of Congo
IGCP	International Gorilla Conservation Programme
NAADS	National Agricultural Advisory Services
CBDG	Creative Business Development Group
UNADA	Uganda National Agro input Dealers Association
TOR	Terms of Reference
UBL	Uganda Breweries Limited
SSA	Sub sector Analysis
AAS	Agricultural Advisory Services
ISFG	Integrated Support to Farmers Groups
OGS	Out grower Scheme
PFA	Prosperity for All
HACCP	Hazard Analysis Critical Control Points
UNBS	Uganda National Bureau of Standards
UIRI	Uganda Industrial Research Institute
PMA	Plan for Modernization of Agriculture
NARO	National Agricultural Research Organization
ICT	Information Communication Technology
MTTI	Ministry of Tourism Trade and Industry
KACOFA	Kapchorwa Commercial Farmers Association
Kg	Kilogram
APEP	Agricultural Productivity Enhancement Program
USAID	United States Agency for International Development
MTRC	Mushroom Training and Resource Centre

EXECUTIVE SUMMARY

This is an Enterprise Networking Mapping (ENM) Study review report prepared by Independent Consultant. EEEGL Uganda carried out ENM study in April 2008 as part of its process to identify potential enterprise development opportunities, and this ENM study report has been reviewed by the Consultant. The consultant was sub contracted to review the ENM study report and provide appropriate recommendations including identification of other necessary information as specified in the terms of reference.

This ENM study review report has been done in a highly participatory manner involving key stakeholders in the three target districts of Kabale, Kisoro, and Kanungu. The review report is comprised of background, rationale of the assignment, the scope and methodology. Field study review findings, lessons and recommendations on the potential enterprises identified, conclusion and recommendations. The information in this report was collected and analyzed through literature review and by consulting key stakeholders in the three districts of Kabale, Kisoro and Kanungu.

The review mission identified some gaps in the study report, which included inadequate information on the current enterprises that the local communities living adjacent to the protected area are engaged in and possible geographical coverage of potential enterprises and including lack of information on estimated number of households in the target project area. The report has not adequately provided information on the possible lessons that the EEEGL project should take into consideration in the process of facilitating enterprise based interventions. Finally, the report did not adequately provide information on the stakeholder's views and interest especially on the final recommended enterprises (i.e. Barley, Irish potatoes, beekeeping and Mushrooms) and the process of validation of these enterprise opportunities with stakeholders in the target project areas (i.e. sub counties bordering the parks). These gaps have been closed in this report while other gaps may exist, the timing of the assignment could not allow further investigation and literature review to close these gaps.

The report validated the information in the ENM study and further consulted stakeholders, which finally resulted into the identification of the following enterprises.

Enterprise	Kabale	Kisoro	Kanungu
Beekeeping	√	√	√
Irish Potato	√	√	-
Climbing Beans	√	√	-
Sorghum	√	√	-
Goat	√	-	√
Piggery	√	-	√
Coffee	-	-	√
Tea	-	-	√
Barley	√	-	√
Mushrooms	-	√	√

Source: Stakeholder Consultation and validation

The last two enterprises are on their infant stage of development but the local communities have high desire for the enterprises owing to their benefits.

The consultant visited UIRI, UNBS, Supermarkets, NAADS, and Uganda Breweries to assess enterprise development opportunities and the report contain the detailed findings on the activities and enterprise development opportunities.

Major lessons identified included sustainability issues, commercialization of the enterprise activities, value chain integrating the poor, resistance to change, building capacity of demand and supply side, and enterprise infrastructure.

In conclusion, therefore ENM study report reviewed by the Consultant contains major field findings on potential enterprises. However, during the review process, the Consultant identified gaps in the ENM study report as outlined above and therefore appropriate information has been collected from the stakeholders mainly living adjacent to the protected areas by the Consultant to fill these gaps. The potential enterprises have been identified through consultation with local community as outlined above and the next process is to review the ENM study review report to facilitate the enterprise screening process. The project management team should therefore review the recommendations of this report to facilitate the process of selecting 2 - 3 enterprise promising options. The lessons identified in this report can be useful in the process of selecting potential enterprises and in designing interventions.

INTRODUCTION AND BACKGROUND

Introduction

This is a report has been prepared in accordance with the requirements of the terms of reference prepared by CARE International in Uganda. This report is part of fulfillment of the project implementation plan under the key result area of Ecotourism and other enterprise activities that support sustainable NRM and conflict sensitive programs. The report is comprised of background, rationale of the assignment, the scope, and methodology. It further covered major areas such as comments on the ENM study report, field study findings, lessons and recommendations on the potential enterprises, conclusion and recommendation. The information in this report was collected and analyzed through literature review and by consulting key stakeholders such as local government agencies at all levels, traders, corporate companies, producer organizations and the rural farmers in the three districts of Kabale, Kisoro and Kanungu.

Background

This review report on the Enterprise Network Mapping study carried out in April 2008. The study is a property of Enterprise, Environment, and Equity in the Virunga Landscape of the Great Lakes (EEEEGL) – CARE International project. This project targets the Virunga Landscape in trans-boundary region of Rwanda, Uganda and DRC. The region is densely populated, mountainous area where livelihoods of local people are largely dependent on agricultural production and natural resource management (NRM). At the heart of this landscape are the natural forests of the Virunga Volcanoes that lie on the borders of the Rwanda, Uganda and Democratic Republic of Congo (DRC).

In Uganda, the region is constrained by number of factors. These include; poaching, crop damage by wildlife. Another source of conflict is increased access to bamboo and water resources within the park. In addition, the poor management of swamps/marshlands by the local community is another big challenge in the area.

EEEEGL is implementing the program based on the four major result areas or themes. Theses include; enterprise development, participatory resource management, Community empowerment, and Trans-boundary collaboration and learning. This assignment puts emphasis on enterprise development as means of improving livelihood in the project area through promotion of market linked value chain approach.

Under the enterprise development, EEEEEGL is expected to support community-based enterprise beyond ecotourism. The project is supposed to employ value chain approach that emphasizes the creation of market linkages between poor micro-entrepreneurs in the informal sector, and the formal private sector from production to the final market.

In the context of this program, the key criteria for selecting enterprise opportunity is potential to generate benefits to local communities, including marginalized and vulnerable groups, and potential to support sustainable NRM either by adding value to resources that can be legally and sustainably be harvested from protected areas, or by providing alternatives to the use of natural resources that are currently being exploited.

The Consultant started by reviewing the current ENM study report done in April 2008, which broadly scopes out all significant opportunities in the three districts and hence identified study gaps and provided recommendations to improve the study as outlined below.

Purpose of the Assignment

This study report has been prepared to meet the following objective:

- To review and identify gaps in the ENM study prepared on April 2008
- Carry out rapid assessment of enterprise opportunities identified by consulting different stakeholders in the three districts.
- To identify enterprise development opportunities in Kampala by consulting selected institutions.
- To provide recommendations to address the identified gaps
- Provide guidance to the project team on enterprise selection and facilitate enterprise selection workshop

Scope of Work

The study has covered three districts of Kabale, Kisoro, and Kanungu inclusive of 12 Sub counties/26 parishes detailed in the study. The study also covered interviews held with major stakeholders including Government Agencies, Cooperatives, Associations, Commercial Farmers, Input Suppliers, Hotels and restaurants, agro processors, Development Institutions working in the three districts as well as selected institutions in Kampala city.

Methodology

The ENM study review was undertaken by Habib Tibrichu (BDS/Agribusiness Development Specialist/Team Leader), Profile of the Consultant is in See Annex 5 of this report. The Consultant was supported by Beda, EEEGL Project Manager, Geoffrey, Environment Coordinator, EEEGL Project, Olive Busengye, Administrative Officer, CBDG and Helen Ninsiima, EEEGL Enterprise Development Coordinator. The Consultant carried out consultation in Kabale, Kisoro, and Kanungu from 17th November 2008 through 28th November 2008. Traveled to Kampala on 28th November 2008 and met with selected institutions in Kampala and Jinja. In Kabale, the Consultant reviewed the ENM study and discussed the preliminary findings with the project management team. The Consultant the project management team developed the work schedule for the field visits (see Annex 6). A detailed schedule with names and contact details stakeholders interviewed is provided in Annex 6. Preliminary field findings were discussed with the project manager on 27th November 2008 including the enterprise selection workshop program that was planned follow. Methodology used included literature review (see Annex 8- references consulted); focus roundtable meetings, face to face interview with informants, physical observations and inspections. The information provided in this report has been summarized from primary and secondary data collected and analyzed.

STUDY FINDINGS

Review and Comments on ENM Study

Approach and methodology

The enterprise scoping approach and methodology resulted into collection of important baseline information of the economic development activities in all the three districts. It has identified relevant information of NRM factors and challenges, government policy framework, strategic partners, important statistics on the actors from different industries, specific analysis of different enterprises based on opportunities, gaps, and areas of interventions, infrastructure, production, and profitability. The mapping report finally recommended four strategic enterprises – Barley, Beekeeping, Irish potato, and Mushrooms. However, the report does not clearly describe the process through which different enterprises identified and mapped were dropped out of the potential enterprise list.

Relevancy of the report content

The content of the report has almost all the relevant data needed to screen and select appropriate enterprises in the three districts. The Consultant identified some gaps which included inadequate information on the current enterprises that the local communities living adjacent to the protected area are engaged in and possible geographical coverage of potential enterprises and including lack of information on estimated number of households in the target project area. The report has not adequately provided information on the possible lessons that the EEEGL project should take into consideration in the process of facilitating enterprise based interventions. Finally, the report did not adequately provide information on the stakeholder's views and interest especially on the final recommended enterprises (i.e. Barley, Irish potatoes, beekeeping and Mushrooms) and the process of validation of these enterprise opportunities with stakeholders in the target project areas (i.e. sub counties bordering the parks). However, the gap that needs to be addressed is to assemble this relevant information so that it provides systematic information based on value chain framework to stakeholders, which shall be useful during the enterprise selection phase. Secondly, the need to relate the information collected from stakeholders and literature to the selection criteria in order to facilitate the stakeholders during screening and selection of 2-3 best enterprises. It should be noted that one of rationale for undertaking enterprise mapping is to collect relevant information on different enterprises in order to make informed decisions on potential enterprises that the project can support.

Strategy to address the gaps

As a strategy to close the above gaps in the ENM Study report. The Consultant proposed and agreed with management team on the following accomplishments during the assignments.

- Validate the findings of the ENM study report with large number of stakeholders at sub county and parish levels. The feedback from the different stakeholders can help to inform and enrich the content of the report especially regarding statistical data, enterprise specific value chain infrastructure and current status, enterprise linkages, local government and development partners interest, financial services issues, enterprise specific actors, and enterprise coverage.
- Develop enterprise overview using value chain approach in relation to the selection criteria if more relevant information needed can be accessed from the stakeholders. The enterprise framework was developed using already available information in the ENM study report. Only those potential enterprises that have been identified by ENM study report and others that might have been identified by stakeholders during the validation exercise in the three districts.
- The Consultant also facilitated the validation exercise by holding roundtable meetings with stakeholders in order to map the potential enterprises by parish, sub county and finally arrive a district level. This information shall help the project to build the foundation for networks with local

institutions and partners that can help the project during the implementation to sustain value chain activity beyond the life of the project.

Field Assessment and Stakeholder Consultation Findings

Kabale district

Kabale district lies in the South West of the Republic of Uganda. It lies between 29°45' and 30° 15' East longitude and 1° 00' and 1° 29' south of latitude. It borders with the Districts of Kisoro to the West, Rukungiri to the North, Ntungamo to the East and the Republic of Rwanda to the South. The district consists of Ndorwa, Rubanda and Rukiga as the three (3) rural counties and Kabale Municipality as the only urban area. The district has a high population of 458,318 from 2002 Population and Housing census results with sex ratio of 86 males to 100 females. The population living in the Municipality is 45,892 and the remaining 91% of the total population stay in the rural area.

Agriculture is the main occupation of the population with 82% producing at subsistence level and the rest on semi commercial agriculture. The main crops grown are maize, Irish potatoes, sweet potatoes, bananas, beans, tobacco, Arabic Coffee, Fruits, Pyrethrum, Peas, Sorghum, Finger millet, Wheat and vegetables. The main cash crops are **Wheat, Sorghum, Tobacco, Vegetables, Beans, Peas and Irish potatoes**. Pyrethrum, Mushrooms and temperate fruits are being developed as cash crops.

Industrial activity is still limited in the district. There are small-scale industries involved in processing agricultural products mainly wheat, maize, sorghum, bananas and pineapple for Banapo wine and honey. Other small-scale industries include bakeries, milk cooling plants, metal fabrications, saw milling, woodwork, handicrafts, brick making, tea packing, Agro processing, Ceramics /pottery, Milk processing (Yogurt) / Cheese and pasteurization, Bakeries, Tailoring, Tie and Dye, Photography, Shoe making (foot wear), Beer Brewing, Carpentry & Joinery. Others are Timber planing, Stone Quarrying, Pyrethrum processing, Honey processing, Soap making, Mining (Wolfram, Tin & Iron ore Lava ash), Printing, Hair dressing, Black Smith, Welding & Metal fabrication, Charcoal Burning, Concrete /Block making, Electrical Engineering, Transport Industry, Petrol station operation, Vegetable farming, Motor/Bicycle repair Garages, Recording Studio, Saw milling, Plumbing, Wine Making and tourism.

The population density is 281.1 persons per sq. km and has an average household size of 4.8 persons, 95,071 households and a growth rate of 0.8. The rural counties are divided into 17 sub-counties, 106 parishes which are further divided into 1,299 villages/cells. The municipality has three Divisions with 12 wards and 75 villages. Of the 17 sub counties only 2 are located adjacent to the protected area (Ikumba and Muko) with a total of 6 parishes (comprised of Kitojo, Mushanje, Nyamabale, Kashasha, Kiyebe, and Kara). Enterprise development opportunities were assessed and validated in the two sub counties and selected parishes (See Annex 3.1 – Kabale enterprise opportunity validation). Through rapid consultative process with the stakeholders i.e. local government administrators, farmer representatives, processors, and commercial farmers, nine potential enterprises were identified. These are enterprises that the local population is already engaged in and they employ over 95% of the local population in these parishes. These included:

1. Mobile phone business
2. Sorghum
3. Climbing beans
4. Sweet potatoes
5. Irish Potatoes
6. Livestock – Goat and piggery
7. Beekeeping
8. Avocado
9. Tree Planting

The Consultant was able to perform relative It should be noted that mobile phone business is a supporting activity in all the enterprises identified above, and sweet potato is grown for mainly for home consumption for food security. Avocado is a new enterprise being supported by NAADS. The above enterprises were further prioritized using the attractiveness matrix and the following priority enterprises were identified.

Rankings of “high”, “medium”, and “low” on each of the 10 enterprises identified above with key informants and stakeholders. A “high” rating in a specific enterprise assessment meant that local community have invested resources and the local community has high interest in the enterprise and it has high return on investment and shorter pay back period; “medium” meant that the local community has invested some resources, and has some interest but the return on investment is low and takes long time, and a “low” meant that no significant investment and has extremely low return on investment. See the table below.

Using this methodology, ranking for these potential enterprises was done as shown in the summarized matrix below in table 1.

Table 1: List of Potential Enterprises – Kabale District

High	Medium	Low
Irish Potato	Avocado	-
Sorghum	Tree Planting	-
Beekeeping	-	-
Livestock –Goat and Piggery	-	-
Climbing Beans	-	-
Barley	-	-

The distribution of the Population and Percentage of Households Involved by Parish

PARISH	No of HH	Pop	Irish Potato	Sorghum	Beekeeping	Livestock	Barley	Beans
Kitojo	848	4040	90%	80%	20%	60%	-	70%
Mushanje	84	3639	90%	80%	30%	60%	-	80%
Nyamabale	1106	5228	90%	75%	25%	65%	-	65%
Kashasha	108	4788	90%	80%	30%	55%	70%	70%
Kiyebe	709	3149	90%	70%	20%	60%	-	80%
Kara	1244	6244	95%	70%	30%	60%	20%	80%
Total	4,099	27,088						

Source: Consultation with stakeholders

Kisoro District

Kisoro is a district in south-western Uganda. Like other Ugandan districts, it is named after its 'chief town'. It is located at a corner of the country that borders Rwanda and the Democratic republic of Congo. The projected 2007 mid year population of the district is 236,600. Of these, 105300 are male and 131300 are female. **Kisoro** is known for beekeeping. Kisoro District is located in the South Western Uganda and borders Democratic Republic of Congo (DRC) and Rwanda. The District is inhabited by Bafumbira, Bakiga and Batwa. Kisoro is home to Muhabura Volcanic Mountains and the rare Mountain Gorillas.

Over 89 % of the population in the District depends entirely on subsistence farming. The rest of the population depends on employment income (5% 2002 Census), business enterprise (2% 2002 Census), cottage industry (0.1% 2002 census), property income (0.2% 2002 census), family support (3.4% 2002 census) and other occupations (0.6% 2002 census). Generally the average household income is very low especially in the rural areas. Farming is the basic industry there and mixed farming is the largest type of farming. Irish potatoes are the leading cash injector followed closely by beans, maize, sorghum (for making local brew) and sweet potatoes. Of late, onions and a host of other vegetables have been introduced.

The District has 13 Sub-Counties and one Town Council. There are 34 rural Parishes, 2 town wards and 389 villages. In Kisoro district, EEEGL is targeting to support local community in five sub counties with a total 6 parishes, which are located adjacent to the protected area. These include: Bukimbiri sub county (Remera), Kirundo sub county (Rubuguri), Nyabwishenya (Nteko), Nyarusiza (Rukongi, and Gitenderi), and Muramba (Gisozi).

Enterprise development opportunities were assessed and validated in the five sub counties and selected parishes (See Annex 3.3 – Kisoro enterprise opportunity validation). Through rapid consultative process with the stakeholder's i.e. local government administrators, farmer representatives, processors, and commercial farmers, 7 potential enterprises were identified. These are enterprises that the local population is already engaged in and they employ over 95% of the local population in these parishes. These included:

1. Irish Potato
2. Climbing beans
3. Maize
4. Sorghum
5. Sweet potato
6. Beekeeping
7. Mushrooms
8. *Community tourism*
9. *Transport –Passenger and Cargo*
10. *Market Vending*

Note: Transport and market vending activities are integrated part of any of any value chain and there shall be integrated into any of the above enterprises once selected. On community tourism, EEEGL and other partners are already supporting development activities under the ecotourism component to support community tourism initiatives.

The Consultant was able to perform relative rankings of “high”, “medium”, and “low” on each of the 10 enterprises identified above with key informants and stakeholders. A “high” rating in a specific enterprise assessment meant that local community have invested resources and the local community has high interest in the enterprise and it has high return on investment and shorter pay back period; “medium” meant that the local community has invested some resources, and has some interest but the return on investment is low and takes long time, and a “low” meant that no significant investment and has extremely low return on investment. See the table below.

Using this methodology, ranking for these potential enterprises was done as shown in the summarized matrix below in table 2.

Table 2: List of Potential Enterprises – Kisoro District

High	Medium	Low
Irish Potato	Maize	-
Climbing beans	Sweet potato	-
Beekeeping	-	-
Sorghum	-	-
Mushrooms	-	-
	-	-

The distribution of the Population and Percentage of Households Involved by Parish

PARISH	No of HH	Pop	Irish Potato	Beans	Beekeeping	Sorghum	Mushroom
Remera	1503	7,565	90%	65%	40%	70%	30%
Rubuguri	1899	9,155	80%	70%	60%	60%	10%
Nteko	1457	6,916	90%	80%	50%	65%	30%
Rukongi	1217	5,394	70%	80%	35%	55%	20%
Gitenderi	1,403	6,155	70%	60%	30%	75%	10%
Gisozi	1,795	7,027	70%	70%	45%	60%	30%
Total	9,274	42,212					

Source: Consultation with stakeholders

Kanungu District

The economy of Kanungu district is comprised of 96% Agricultural activities, 2.1% Commerce, 0.1% Tourism, 0.3% Industry, 1.0% Service and 0.5% Unemployed people. Agricultural activities is further subdivided into 96.9% crop farming, 3.4% livestock and 0.7% other agricultural activities. Kanungu District is located in south western Uganda between 29° 50'E and 0°45'S of the Equator, bordering the Districts of Rukungiri in the north and east, Kabale in southeast, Kisoro in the south and the Democratic Republic of Congo in the west.

Population for Kanungu district has increased from 118,658 in 1980 to 160,708 in 1991 and then 204,732 in 2002 and 226,100 in 2007 according to census results respectively. The district contributes 0.8 percent of the total population in the whole country. Population has been growing at an average rate of 2.1 percent for the last three decades compared to the national growth rate of 3.3 percent. Over this period of 22 years since 1980 there has been an increase of 75 percent. The average population density is 184 persons per square kilometer of land area. The population density of the sub counties varied between 120 persons per square kilometer for Rugyeo Sub County to 349 persons per square kilometer for Mpungu Sub County.

The Kanungu district is divided into 11 sub counties with 57 parishes of which 14 parishes are located adjacent to the protected area. These include: Kayonza sub county (Mukono, Bujengwe, Karangara, Ntungamo), Kirima sub county (Bushura, Rubimbwa, Rutugunda), Town Council (Southern Ward), Rutenga (Kinaba, Muramba), and Mpungu (Ngara, Mpungu, Burema, Muramba).

Enterprise development opportunities were assessed and validated in the five sub counties and selected parishes (See Annex 3.3 – Kanungu enterprise opportunity validation). Through rapid consultative process with the stakeholder's i.e. local government administrators, farmer representatives, processors, and commercial farmers, 7 potential enterprises were identified. These are enterprises that the local population is already engaged in and they employ over 95% of the local population in these parishes. These included:

1. Tea
2. Coffee
3. Beekeeping
4. Goat
5. Piggery
6. *Barley – pilot project with high potential*
7. *Mushrooms – New investment opportunities for low income people*

It should be noted that the local community are also engaged in other farming activities, which include among others banana, cassava, maize, peas, Irish potatoes, sweet potatoes, and millet. These crops are grown mainly for household food consumption and they are grown at each household. Tree planting is another opportunity in selected parishes. Many these crops are grown in limited quantities by the community living at the boundary of the protected area. This is because of the wild animals attack and destroys many of these crops. The household has resorted to keep the young boys home to protect crops from the wild animals without going to school.

The Consultant was able to perform relative rankings of “high”, “medium”, and “low” on each of the 10 enterprises identified above with key informants and stakeholders.. A “high” rating in a specific enterprise assessment meant that local community have invested resources and the local community has high interest in the enterprise and it has high return on investment and shorter pay back period; “medium” meant that the local community has invested some resources, and has some interest but the return on investment is low and takes long time, and a “low” meant that no significant investment and has extremely low return on investment. See the table 3 below.

Using this methodology, ranking for these potential enterprises was done as shown in the summarized matrix below in table 3.

Table 3: List of Potential Enterprises – Kanungu District

High	Medium	Low
Tea	Barley	-
Coffee	Mushroom	-
Beekeeping	-	-
Goat	-	-
Piggery	-	-
	-	-

The distribution of the Population and Percentage of Households Involved by Parish - Kanungu

PARISH	No of HH	Pop	Average Percentage of HH involved in the enterprise				
			Tea	Coffee	Beekeeping	Goat	Piggery
Mukono	1073	5,495	70%	50%	10%	50%	50%
Bujengwe	952	4,893	70%	50%	10%	50%	50%
Karangara	724	3,636	70%	50%	10%	50%	50%
Ntungamo	1705	8,678	70%	50%	10%	50%	50%
Bushura	744	4,082	70%	60%	30%	60%	-
Rubimbwa	501	2,708	70%	60%	30%	60%	-
Rutugunda	692	3,509	70%	60%	30%	60%	-
Southern Ward	825	4,479	80%	60%	30%	70%	-
Kinaba	1128	5,145	80%	-	20%	60%	-
Muramba	886	4,678	80%	-	20%	60%	-
Ngaara	413	1,884	85%	50%	30%	65%	45%
Mpungu	407	2,063	90%	60%	15%	65%	50%
Buremba	401	2,000	80%	75%	30%	60%	40%
Muramba	432	2,184	80%	70%	25%	65%	55%
Total	10,883	55,434					
District	42,486	229,011					

Source: Consultation with stakeholders

Key Enterprise Opportunities Identified and Validated

Enterprise	Kabale	Kisoro	Kanungu
Beekeeping	√	√	√
Irish Potato	√	√	-
Climbing Beans	√	√	-
Sorghum	√	√	-
Goat	√	-	√
Piggery	√	-	√
Coffee	-	-	√
Tea	-	-	√
Barley	√	-	√
Mushrooms	-	√	√

Source: Stakeholder Consultation and validation

Note: this enterprise mapping represents the distribution of potential enterprises in those parishes bordering the protected area. At the district level the mapping could look different from this perspective.

Beekeeping – is a common enterprise in all parishes as a major economic activity due to the favorable climatic conditions. The number of farmers in the three districts is still low and production is not adequate to meet the ever increasing market demand. The average farm gate price is 3,100 – 3,500 Ushs per kilogram. It is environmental friendly; its promotion can reduce conflict in the protected area by reducing number of local community to search for wild honey in the protected area. The enterprise has already 3 processors in Kisoro district that has establish strong market links with buyers but the available quantity of honey cannot meet the demand. Opportunity for value addition is high, and it has multiplier effects on employment opportunities such as production of harvesting gears, honey by products, impact of bees on pollination, and value chain still weak and disorganized. The market for honey and honey by products is high with a lot of regional trade between Uganda, Rwanda and DR Congo.

Irish Potato – is a vibrant enterprise and highly commercial in nature. It is the most common and highly profitable enterprise in Kabale and Kisoro, with an average farm gate price of 25,000 – 30,000 Ushs per bag. The local seed producers are available in the region and linked to research institutions. The use of chemicals and fertilizers has negative effects on the soil fertility and therefore productivity. According to farmers close to the boundary of the protected area such as at Rubuguri, Nteko, and Gitenderi, they cannot grow crops like Irish potatoes because of the raid and destruction caused by the wild animals. There is fear by farmers that the spraying of the Irish potato farms kills Bees. Bee Specialist interviewed in the region revealed that Bees are highly sensitive animals that once spraying of the chemicals are taking place, the Bees will always keep away from the site but those found collecting Nectar may die. The major effect of spraying is that after spraying and once its effects reduce, the Bees to collect Nectar with chemicals that can containment the honey. The enterprise is very disorganize for example the farmers do not use weighing scales to measure their produce; the associations are weak in terms of governance, and marketing organization, finance. The market for Irish potato is high with a lot of regional trade between Uganda, Rwanda and DR Congo. Agro input supply; capacity building, market organization, and value addition are critical areas that need to be upgraded to increase farmers' income. The domestic market is managed by the middleman, and some of the vibrant local agro traders.

Climbing Beans – this enterprise is both a cash crop and food security crop. It is grown at household level but the farmers operate on individual basis. The marketing system is controlled and managed by middleman and some commercial farmers. It has high regional trade opportunities especially in Rwanda, DR Congo, and South Sudan. Average farm gate price is 800 Ushs per kilogram. There are number of the projects that have promoted this enterprise before including one of CARE project. The organization of the value chain can help

to increase the income of the farmers. Pest and diseases are some of the major constraints. Environmental friendly and grown basically using organic farming practices. Access to improved high yielding seeds is one of the critical challenges facing farmers in increasing productivity. It provides basic food for vulnerable people since it can be grown on small piece of land. Beans are nutritionally rich, especially in protein and iron, along with being a good source of dietary fiber and complex carbohydrates. Given their nutritional quality and high consumption levels, beans make an important contribution to human nutrition, especially for poor consumers. In addition to high quality protein, a single serving (1 cup) of beans provides at least half the recommended daily allowance of folic acid (a B vitamin that is especially important for pregnant women) and 25-30 percent of the daily recommended iron levels. Similarly, the same serving of beans provides 25 percent of the daily requirements of magnesium and copper, and 15 percent of potassium and zinc.

Sorghum – Sorghum is a main staple of people's diet in Kabale and Kisoro. It is consumed in the form of stiff or thin porridges, as a steam-cooked product, such as a beverage. Sorghum is an important staple food crop in southwestern region. It provides an important raw material for mushroom production and for animal feeds. Locally farmers use it for making local brew that has high local market demand. It is an annual grass that varies between 0.5 and 5.0 meters in height, sorghum produces one or several tillers, which emerge initially from the base and later from the stem nodes. The flower is a panicle, usually erect, but sometimes recurved to form a goose neck. The average farm gate price is 700 Ushs per Kilogram. The value chain looks the same with climbing beans.

Livestock – Goat, and pig – these enterprises are common in Kabale and Kanungu. Especially goat has a high local market demand and as well as a regional market especially in DR Congo. The average price for a goat is 70,000 Ushs. The value chain is weak and much disorganized, many farmers operate as individuals and the product is sold in the local market days when the farmers need cash. It is one of the promising enterprises for the local people at the boundary of the protected areas. Local government and Development projects have supported this enterprise by distributing free goats to the local population whose impact cannot be traced. According to the local government officials, the local population has not taken these interventions as commercial activities but rather as free supply of goods and services because of their disadvantaged situation caused by the park. Goats are good because they consume less pasture than cows and yet the local people have limited land. Veterinary services are generally lacking, farmers work individually with not organized market structures. Increasing veterinary services and increased capacity building on entrepreneurship, business management and cultural transformation would increase the opportunity. Pigs has high yield of average of 20 piglets per annum. The local market is high especially in urban areas. Feeding of pigs is a major challenge especially for vulnerable population. There is a need to develop a commercial goat rearing program that can stimulate economic development for the local population instead of provision of handouts that are not sustainable in the long run.

Coffee – is one of the main cash crops for Kanungu. It is grown on commercial basis by smallholder farmers. Coffee promotes peace and harmony at the boundary of the natural parks and provides nectar for the Bees. It is grown under organic conditions. The farmers are fairly organized in small groups and associations. The local processors and traders are drive forces behind the coffee market through their market linkages with large exporters based in Kampala. Last year, Uganda earned about \$257m (sh429b) from coffee exports, out of which \$3.5m (5.8b) was from organic coffee production. The major challenge reducing productivity is the spread of wilt diseases and old coffee trees including post harvest handling. The average farm gate price is 500 – 800 Ushs per kilogram. Strengthening the existing associations and promoting production of quality coffee can enhance farmer's income.

Tea – this is one of the major cash crops in Kanungu. The tea industry is driven by two processors Kayonza tea factory and Kikinzi Development Tea Company, all are tea exporters in Uganda. Tea is grown in Kanungu and partly in Kisoro and Kabale by smallholder farmers. Pesticides are also widely used on tea plantations, creating health concerns not only for workers, but also for tea consumers. Workers often apply pesticides without proper protective masks or clothing, or they may drink from pesticide-tainted streams. However tea

is buffa crop at the boundary of the protected area and NAADS is promoting production of tea in Kanugu to large number of farmers. The average farm gate price per kilogram is 230-250 Ushs. Tea processing also involves use of fuel wood, which is considered not environmental friendly but however, with sustainable use of the fuel wood and planting of trees this enterprise increase economic growth. The major constrain with this enterprise is that new farmers can take long to harvest their first crop (2 ½ years) and it requires investment of money for purchase of fertilizers and chemicals. Strategic intervention geared towards increase productivity per acreage would definitely increase household income of the largest proportion of the population bordering the protected area. The interventions can include capacity building for improving the agronomic practices, promoting the use of organic manure, quality assurance and good post harvesting handling.

Mushrooms - Mushrooms are the only natural fresh vegetable or fruit that contains vitamin D. The market for mushrooms continues to grow due to interest in their culinary, nutritional, and health benefits. They also show potential for use in waste management. However, as fungi, mushrooms have life cycles very different from those of green plants. Small-scale mushroom production represents an opportunity for farmers interested in an additional enterprise and is a specialty option for farmers without much land. Mushrooms contain many essential amino acids; white button mushrooms, for example, contain more protein than kidney beans. Mushroom production in the three districts is driven by the local market demand and the processor – Mushroom Training and Resources centre, which is engaged in production of spawn and processing of fresh mushrooms for the local markets in Kampala and Kabale.

MTRC provides the future to the mushroom value chain. It has been supported by IGCP with drier technology and training. It has capacity to produce 1,800 packets of spawn per annum. It has been producing spawn, supplying to farmers and providing extension services. MTRC buys fresh mushrooms from farmers, process and distribute both fresh and dried to supermarkets and hotels. It is working with 106 farmers in the three districts. MTRC future plans is to integrate its operation to supply ready to plant mushroom tube to selected farmers as out growers and expand on the coverage of the farmers to improve the value chain.

Farmers in Kisoro are growing mushrooms using spawn supplied by MTRC but soon through Japanese Development Agency, the Kisoro local government will establish spawn production centre. The main constraints to farmers is the access to fresh mushroom market on daily basis and equipment needed for post harvesting handling and value addition. Spawn production and supply is low but more challenging situation is the farmers cannot adequately handle the preparation of substrate spawned bags. This call for strengthening capacity of spawn producers to produce ready to plant tubes in order to increase productivity. This initiative must be supported with ready market through forward and backward linkages. However, without this initiative supporting this value chain will only yield short term results with no sustainable impact. The average farmer price is 2,000 -3,000 Ushs per kilogram. The market demand is high mainly driven by households, supermarkets, hotels and restaurants. Regional market for mushrooms also exists especially in Rwanda and DR Congo. It is environmental friendly with exception that the current technology promotes the use of fuel wood. However, through improving the technology for processing and production, this situation can be improved.

Pilot Barley Production

The Consultant visited barley growers in Kashasha parish where the pilot barley growing has been implemented by EEEGL in partnership with local community. Under the Kashasha Barley Farmers Association, farmers managed to grow Barley as a new crop. The association started with 130 farmers of whom 45 were women. The association received on credit Barley seeds from Uganda Breweries through EEEGL CARE project. Each farmer was allowed to access about 20 kg of Barley seeds on credit valued at Ushs 14,000 (@ kg is Ushs 700). The outcome of the pilot included the following key facts.

Of 130 farmers in Kashasha parish only 20 farmers were able to successfully harvest Barley with a total production of 1.5 Mt. The projected production was 8.75 Mt if all the agronomic practices were practiced by the farmers (i.e. 1 kg of seed can produce 35kg of barley grain). However, the average yield was 1 kg produced 16 kg and over 110 farmers failed to harvest or did not plant the Barley seeds. Several factors were attributed to the success or failure of the crop. Those farmers who succeeded participated in the training and were able to plant the crop in the right time. Hence, they practiced some basic agronomic techniques. However, over 70% of those who failed, the major reasons were attributed to lack of participation in the training, failure to follow agronomic practices and planting the barley at a wrong time. The farms were attacked by rats and other pests including monkeys since barley was the nearly the only crop in the season and the bad weather partly contributed. The reasons why many farmers did not attend the training was because of resistance to change and lack of sensitization of the local community on the benefits of the barley. The farm gate price is Ushs 500 charged by the UBL agent and during the time of this field visit, 1.5 Mt of barley had stayed at the store for one and half month waiting for the UBL agent to buy. The access roads to the storage facility are so poor and impossible to pass through during rainy seasons. However, the demand for Barley seeds are on high demand as farmers have seen the outcome of the pilot and secondly Barley has an advantage over sorghum grown by most of the farmers for example 1 kg of barley can yield 35 kg of grains while 1 kg of sorghum can only yield 8 kg. The first harvest has been successfully bulked through the association and more training and extension services are needed to improve on the productivity. The major fear and challenge to many farmers now is the issue of sustainability and reliability of the market.

Further assessment of Barley intervention was carried out in Rutenga Sub County in Kanungu. In this sub county, Barley production is promoted by Rutenga Wheat Farmers Association. This association and its members have had experience in growing Barley in the Sub County. The farmers received training through the support of the Sub County and NAADS. Through the association farmers were able to bulk Barley and supply to Uganda Breweries. During their first harvest, the farmers produced 5 Mt and UBL paid the farmer Ushs 400 per kilogram, the second harvest season was much better and the farmers managed to produce and bulk 15 Mt and UBL increased the farm gate price to Ushs 500. Recently the farmers managed to produce and bulked 45 Mt; UBL got motivated and increased the farm gate price to Ushs 750 per kilogram after signing an agreement with the farmers directly. NAADS has continued to provide technical assistance and advisory services to the farmers. This success story revealed the hinder benefit of the Barley pilot in the region. Barley can be replicated and produce in large volume but only if the breweries can guarantee the market and the processors can provide attractive price per kilogram. The supply of seeds and extension services continues to be reliable and timely. Barley according to the farmers can grow easily with more yields than sorghum with 3 months. The cost of production is low because of less labor intensive, and post harvesting handling is manageable to the farmers.

The market for Barley is available but the major challenge is to meet the specifications of the processors and to sustainable and consistently continue to supply Barley. This enterprise has high potential to increase rural income once the value chain is upgraded to meet the market demands. To upgrade enterprise value chain, the project needs to strengthen the capacity of existing associations and create new farmers groups and association to step up production, develop and implement private sector led extension services and training by building capacity of the providers, facilitating forward market linkages with several processors like Nile breweries, UBL and the brewery in Rwanda.

In summary the above enterprises can be described using the key factors such as market development, products and services, NRM factors and challenges, government policy framework, strategic partners, important statistics on the actors from different industries, specific analysis of different enterprises based on opportunities, gaps, and areas of interventions, infrastructure, production, and profitability.

Kampala Field work

Uganda Breweries Limited (UBL)

Presently UBL is the sole buyer and consumer of the Barley grains in Uganda on large scale and a key stakeholder on the Barley value chain through its forward and backward integration. UBL can buy any quantity of Barley grains so long as the quality requirements conform to the specifications and standards of procurement. Once the farmers decide to plant Barley, they must guarantee supply of quality Barley grains to be sold to UBL at an agreed price. Irrespective of whether there is a bumper or low harvest, the agreed price shall be honored by UBL. It is with hope that this partnership does not develop into a monopoly type of business whereby other potential enterprises are unable to access the Barley from any of the region. The price offers vary depending on the quality, and volume of Barley including the hidden cost of delivery. Well organized group of farmers and consistent in meeting their supply contract requirements are likely to enjoy higher prices than those farmer groups or commercial farmers or agents who are disorganized and unreliable.

A typical example is the Barley production initiative supported by APEP USAID project in selected districts of Kapchorwa, Kasese, and Kaborale. In 2005 B seasons APEP and UBL engaged into a strategic collaboration to promote Barley in these selected districts. Through this initiative 32 demonstration sites were established in Kapchorwa during the season. Each demonstration site was one acre with a high external input package. 2 varieties of seed were planted namely Karne (with seed rate of 40kg/acre) and Sabini (with seed rate of 34kg/acre). 50 kg of DAP and 20 kg of Urea fertilizer rates were applied on each demonstration plot. A total of 550 collaborating farmers of which 272 were females were exposed to the improved production and post-harvest practices through the technology transfer sites. Average yields of 606 kg/acre were obtained from the demonstration sites.

The yields were poor was attributed to poor rains received in 2005B season. About 980 Mt of Barley grain was procured at the end of the season by UBL. During the start of 2006A season, the project was the expanded to western Uganda through Afro-Kai, a private grain trading company providing the link between the farmers and UBL in the districts of Kasese and Kabarole. In Western Uganda an Out growers Scheme (OGS) were established with about 2,035 farmers registered. The OGS in Kapchorwa was maintained with about 1,300 farmers registered. A total of 225,000 kg of seed was distributed for planting in these OGSs. The farmers established approximately 5,000 acres of barley farmers. Farmers signed a contract with KACOFA in Eastern and with Afro Kai in Western Uganda to supply barley grain.

This intervention resulted into production of barley grains. The yields from the demonstrations sites averaged 1,750 kg/acre compared to farmers output of 800 kg/acre. The output for farmers in western Uganda was affected by diseases. The low altitude coupled with high humidity and low temperatures in the region favored the survival of fungal pathogens and the eventual disease outbreak. UBL managed to procure 2,530 Mt of barley grain from all the farmers valued at US\$ 556,480 (Ushs 1.01 billion) at average farm gate price of Ushs 400. UBL imposed penalties on barley that did not meet its quality parameters.

Uganda Industrial Research Institute

Uganda Industrial Research Institute (UIRI) is a parastatal institution under the auspices of the Ministry of Tourism Trade and Industry (MTTI). The mandate of UIRI is to engage in activities that will lead to rapid industrialization of Uganda by identifying appropriate and affordable technologies that will enhance adding value to local products, so that they can be processed for national, regional and international markets. This mandate is achieved through focused research and development and also through designing prototype to help train and develop enterprises.

Under the business incubation centre, UIRI provides business support, modular work premises, mentoring and networking for private enterprises. Among enterprises they have supported include – Kitty enterprises

(processes potatoes into vacuum packed potato chips, Crisps and Flakes it due to operate in February 2009. Other enterprises supported are engaged in meat processing, fruits and vegetables, health supplement, ICT, and matooke. The nature of services offered by UIRI to private businesses include – modular work premises, technical support, business plans, linkage with experts, marketing and publicity, access to information, networking, production facilities – machinery and refrigerators, coaching and mentoring.

UIRI recently started to undertake research into local mushroom varieties. The initial laboratory testing activities have just started but the main factor constraining the product development process is lack of access to fresh quality wild mushrooms, and resources for handling the logistics for the research trails. The objective of UIRI is to develop local mushroom varieties spawn that can be multiplied by private producers. In addition, UIRI will carry out further product development to add value to the mushroom by develop different products suitable for the markets. This product development process is still at infant stage and the willingness to undertake the activity on the part of UIRI is high because the Government has high interest in promoting mushrooms.

On Irish Potato, UIRI has developed Irish potato products such as Crisps, French fry, and potato powder. UIRI has imported machinery for processing of the above products and the installation and the operation of the factory shall be due in February 2008. NARO through its branch in Kachwekano Research institute in Kabale district has developed a new variety of Irish potato suitable for the processing into these products. However, the seed multiplication has not started yet. UIRI shall definitely need the support of organizations to support the backward integration of the processing facility by increasing access improved seeds, provision of extension services, and mobilization of farmers to bulk and supply the factory. The pilot plant will have a capacity of processing 1 ton of Irish potato per day, once it is successful, the plant can be scaled up.

New National Agricultural Advisory Services (NAADS)

The implementation of the new NAADS programme resumed in April 2008 after a Cabinet reviewed the NAADS activities in the country. The President suspended NAADS activities in October 2007 as a result of a number of problems arising from poor procurement processes, lack of accountability, inadequate Local Government capacities and lack of political support at Local Government level. The slow implementation of the other components of the Plan for Modernization of Agriculture (PMA) was also a major challenge. The programme has now been restructured with additional mandates for effective delivery of advisory services to achieve the Prosperity for All.

Under the restructured NAADS, the programme will utilize different categories of Government Extension workers located in each district/ sub county and research institutions for the provision of quality agricultural advisory services (AAS) to farmers. This is important area where EEEGL can collaborate with districts and sub counties to effectively build synergy to support large number of farmers.

Farmers have also been categorized into Demonstration, Lead, Model and Nucleus farmers for better targeting. Different farmers graduate to a higher category at different times which shows levels of successful adoption and implementation. A **Demonstration farmer** is a member of a farmer group who hosts a demonstration or learning site for a selected enterprise on behalf of a group. A **Lead farmer** is an early adopter who has transformed the demo into a standardized production unit and has some resources to upscale the technology. A **Model farmer** on the other hand, has started to commercialize and has potential to generate Ushs 20 million per annum while a **Nucleus farmer** may be involved in processing, value addition or marketing. In exceptional circumstances, a farmer group, association a cooperative society, or limited liability company can host Nucleus farm. This structured farmer levels provides opportunity for EEEGL to facilitate commercial enterprises. For instance a pilot initiative at the district level can be developed together with NAADS and EEEGL to demonstrate the benefits of categorization using value chain approach.

Therefore, NAADS has a big role to play in the implementation of the government Prosperity for All (PFA) programme in Uganda. In line with increasing incomes of the subsistence farmers, NAADS will also ensure that farmers engage in more than one enterprise (Enterprise Mix) to enable them earn more money. Hence many farmers will be gradually shifting from subsistence farming to market-oriented production in the medium term and ultimately to commercial production in the long term. Through the Integrated Support to Farmer Groups (ISFG), NAADS is also providing a revolving fund to the farmers to increase farmers' access to improved seed, better breeds and inputs. Also through Public private Partnerships, farmers will be linked to processing and marketing units along the value chain. This description of the new NAADS programme provides an opportunity for EEEGL to work with NAADS at national and district level in trying to actualize the programme objectives.

Supermarkets

The Consultant visited Shoprite Checkers, Uchumu, and Quality supermarkets to assess the marketing of selected products like honey, mushrooms, and fruits and vegetables. The findings of this assessment were interesting and very valuable. For example, on mushrooms, the supermarkets are selling Oyster type of mushroom locally produced packed in half kilogram at Ushs 3,800 while the importer Oyster and white, brown button from South Africa cost Ushs 12,000 per half kilogram. These imported mushrooms look so tasty, packed in an attractive packaging with good moisture control and fresh. According to the Groceries Manager Shoprite, these imported mushrooms hardly spent more than 2 hours on shelf.

For the case of honey products, there is range of locally produced honey on the shelves. However, Mgahinga honey is the cheapest sold at Ushs 3,650 (500g), and other honey products include Pure Honey Teddy Bear, which cost Ushs 6,600 (230g) a fast moving product in the supermarket, Pure Honey Flora Multi (500g), it costs Ushs 3,875 and Honey Mine (500g), cost Ushs 3,700. Mgahinga honey can also develop 230g honey packed in *a Gorilla like packaging*, which is attractive to customers. All these honey products except Mgahinga honey are certified by UNBS, which helps to build the customer confidence.

According to the supermarkets management, in order to demonstrate to the market that the smallholders have produced a high quality product, they need to introduce mechanisms that will allow each consignment to be traced back to its point of origin. The system should be thorough and transparent enough to highlight all the different processes that the consignment has been exposed to.

The supermarkets carry out due diligence as a process of screening suppliers. The most important aspect of due diligence is record keeping and documentation. It is critical to have good records of all aspects of production and handling such as field spraying records or percentage pack-out and quality. The quality and condition of the product when it arrives at the central sorting site need to be recorded, and this may help solve disputes between the supermarket with suppliers should these arise. It is necessary to indicate who in the organization is responsible for which steps and when important actions are required.

Good records are necessary where traceability is required (of the product from the farm to the market). One of the most common recording systems is to give each individual farmer a number and this is assigned to all transactions relating to this farmer, including each consignment. If necessary the association that the farmer belongs may be assigned an alphabetical letter which can prefix the farmer number.

When the farmer makes a delivery to a central collection or sorting centre of the supermarket, the date of delivery can be used as the batch number, a specific batch number can be used or a combination of date plus number can also be used. The supermarkets prefer not to repack produce as this may increase losses due to damage, so the field packing must be very thorough by farmers or agents.

All the supermarkets interviewed recommended that in order to manage a good assurance system the farmer organizations should have well trained and motivated staff who understand the importance of the system and are committed to ensuring effective implementation.

HACCP (Hazard Analysis Critical Control Points): The main hazards that may affect consumers that are found in fruit and vegetable production, and honey. These hazards are related to marketing such as microbial contamination and pesticide residues on the product. A hazard is any biological or chemical or physical property or condition of food which may cause it to be unsafe for human consumption. All possible sources of hazards should be identified and it is usually necessary to call in experts for this work. Therefore, it is very important for projects like CARE to support the producers to comply with some of the basic minimum requirements of quality standards otherwise marketing through supermarkets becomes meaningless to the growers. UNBS can be useful in helping in developing the quality assurance including the certification.

Some of Standards and Specifications Requirements

The following provides an example of standards that can be used for preparing the produce before delivery to the customer.

- Size. The products will be of uniform size and separate size grades will be packed in separate boxes
- Colour. The produce will be of uniform colour and maturity and the different colour grades will be packed separately.
- Blemish. The products shall be free of all blemishes, bruises or disease scars or signs of damage by pests. Products with minor scars (up to 5% of the surface) will be packed as a separate and lower grade.
- Taste. The varieties of products to be grown will be selected on the basis of taste that is acceptable to the client. Agronomic activities must be implemented so as not to alter the taste characteristics required by the customer.
- Pesticide and Fungicide residues. The products shall be free of all residues and they shall be produced using Integrated Pest Management techniques and all harvest intervals shall be followed.
- Packaging. The products shall be packed in strong, durable, clean (and cleanable) containers that provide full protection to the contents.
- Labelling. The products shall be properly labelled with the name of producer, production area or district, and date.
- The product must have reached the required maturity level. They must have reached the required level of physiological development to enable ripening if this is necessary.
- They must be able to arrive at the supermarket in a satisfactory condition. In all cases the product must be fresh and intact. T
- The product must be sound that is free of disease, rotting or deterioration.
- The product must be clean and free of any visible foreign matter and any foreign smell or taste.
- Presentation: The content of each package must be uniform and contain only the same variety, origin, quality and size.
- Packaging: The packaging must protect the produce properly. The materials used for the packaging must be clean and any cushioning material must be new and must not cause damage to the produce.

Key Lessons

Sustainability of Interventions – Interventions through the value chain approach must be well designed to address issues related to sustainability. Through resources sharing local communities have been provided with goats to supplement their income. However, several households have been reported to have sold off their goats without multiplying them. One of the factors advanced by the key informants is that only one goat is offered for free which does not make any business sense and secondly there is lack of access to veterinary services coupled with limited level of education among the local community. In order to sustain any interventions with this community must emphasis capacity building (training in entrepreneurship, cultural transformation, networking issues, building capacity of local providers, exposure visits and supporting institutions and encouraging the local community to have hope in life) must be addressed

Economic activities – commercialization of enterprise: Local community along the protected areas view themselves as the most disadvantage groups in Uganda and therefore, the development projects and other government initiatives have supported the community to belief in the perception by distributing free goods and services. Lack of emphasis on commercialization for sustainable livelihood sounds remote in many of the interventions in these areas. The strategy to address these factors requires working with selected individuals, groups and associations to demonstrate that things can be done differently and that the benefits can be enormous for the local community in a sustainable manner. Of course there are challenges in implementing commercial service orientation but the factor of commercialization must never be dropped out of the context of any intervention.

Exit strategy: Sustainability means the projects have defined their exit strategy right from the begging. Working with local partners and building capacity of local providers offers exit strategy for the project. The facilitator's role is considered to be temporary in such interventions. Defining an exit strategy upfront clarifies how the facilitating organization will contribute to the sustainability of the program through a planned cessation of involvement in the market.

Project strategic linkages – enterprise linkages and project to project coordination has resulted into duplication of initiatives in the PA. The local government for example provided goats to same community, which has been targeted by BMCT and IGCP including NAADS. Coordination and joint planning to leverage resources can help to address the development challenges in the local community.

Capacity building – Farmers, associations and service providers: Developing markets for Business Services is limited because the willingness to pay and ability to pay is low in these target areas. Building capacity of providers to offer business services and producer organizations to consume commercial services is vital. Using the value chain approach this can be achieved because several programs have failed to implement development activities based on value chain approach. Value chain analysis can also be instrumental in identifying key relationships in a subsector that might be leveraged to support beneficiaries. For example, the facilitator may learn that key wholesalers throughout the region not only serve the nearby towns but also truck fresh produce to a wholesale market in Kampala. The wholesaler may not deal with all the smallholder farmers, although demand for fresh produce exceeds local supply, farmers do not grow the varieties that urban customers want. By working with wholesalers to develop an embedded package of services (providing advice to farmers on crop selection and inputs), the facilitator can help build a mutually beneficial business relationship between the farmers and the buyers.

Resistance to change and deprivation of rights: Some of the people in the local community are unwilling to change their attitude towards promoting economic development. Hence, some of the local community people have refused to accept the importance of the protected area as part of the community development as evidenced in the stakeholder interviews. They view the protected area as a major hindrance to their economic development progress because it has deprived them to develop agriculture as business. This factor is one of the conflict sensitive areas that have hindered agricultural development in these target sub counties especially when it

comes to threats posed by the wild animal rids in the adjacent villages to the park boundary. However, the causes of these resistances to change have been due to the fact that the expectations of the local communities have not been met by the local governments and other development partners. The low level of education among the community members partly contributes to the resistance to change, and finally, the diversion of opinion between what the development facilitators want and the demands of the local community in terms of economic development initiatives partly contributes to the prevailing circumstances.

Further young boys especially don't go school because they are providing security to households to protect food crops from rids by the wild animals such as baboons, and monkeys. Introducing new enterprise that can generate revenue and reduce this pressure could change the livelihood of the new generation to come but because of this imposed circumstances created by prevailing government policy on conservation of natural resources, the future of economic development and growth of these communities will continue to remain backward. The young children with no education in the local community would create manpower gap of competent and skilled personnel. Hence, the rights of the young people are being deprived due to circumstance imposed choice.

Enterprise Infrastructure: The different enterprises identified in the project areas lack basic infrastructure like governance, producer organizations, storage, providers, quality standards, clear supply channels, and value addition units. This shall make implementation of the project based on value chain approach different and expensive to implement. In order to achieve substantial results, the project shall have to facilitate the development of major infrastructure to improve efficiency and effectiveness. This takes time, and requires substantial resources.

Integrating the Poor into Mainstream Markets - Integrating the poor into mainstream markets through the value chain is one of strategic objective of EEEGL project. Poor farm producers of cash crops are hard to be identified but should be integrated into the mainstream markets by increasing sustainable access to productivity - enhancing products and services. Vulnerable people can be identified and targeted. Linking the farmers and farmers groups with the input suppliers is important in creating sustainable commercial relationship. Innovative approaches are needed, which are already lacking in many of the previous interventions as reported by the stakeholders. For instance, the markets serving the poor are often very weak especially local market managed by brokers but, they usually exist.

Kigezi Business Development Services (KBDS I) project funded by CARE Uganda has demonstrated that even in very weak markets, serving the very poor, microenterprises and other community-based businesses can be engaged to sell support products and services to the poor. The Community based Trainers offer a range of services such as honey harvesting services at fee, and hire of spraying pumps at affordable fees to local people in Kabale, Kisoro and Kanungu. Facilitating local partners or private enterprises through promoting market linkages by KBDS I and strengthening these linkages by supporting embedded services through provision of passion fruit seedlings and training as embedded services has started to create BDS market. The project has managed to integrate large number of poor people through the establishment of local collection centers to increase passion fruits, and honey bulking so as for the farmers to access better paying markets unlike the previous market systems managed by brokers or middlemen aimed at cheating the poor. This strategy can be achieved by subsidize large-scale to strengthen their supply chain by incorporating small enterprise suppliers or vulnerable groups through backward integration. This subsidize can be done through matching grants.

STRATEGIC ENTERPRISE SCREENING AND SELECTION

Methodology and Approach

The following is the proposed methodology and approach that can be used in the selection process of 2 -3 suitable enterprises.

Methodology and Approach

- The Consultant shall hold roundtable meetings prior to the workshop with project team from Uganda and Rwanda to discuss comments and observations made by the team on the enterprise mapping study reports.
- Dissemination of the enterprise mapping study reports to the key stakeholders by the project management team as part of stakeholder's literature review and involvement shall be done by the project management team.
- During the workshop, the Consultant shall make a brief presentation on strategic issues related to enterprise development and value chain approach including strategies for integrating the poor into the value chains. Part of the presentation shall include strategic issues on the project facilitation role and BDS practices.
- The workshop participants will be provided with enterprise screening scoring sheets to screen the potential enterprises. The score results from individual respondents shall be compiled by the Consultant and the screened enterprises shall be ranked in accordance with the score results and the final results presented to the workshop participants for the final comments and observations.
- Technical working group shall be established comprised of the Natural Resource Management Experts and project management team to review the best five selected enterprises based on the project objectives and expected results. The findings of the group shall be presented to the workshop participants for further deliberation and final approval of at least 2-3 promising enterprises.
- The findings, comments and recommendations of the workshop shall be prepared and presented as part of the final report.

Selection Process

The following are some of the proposed steps that the stakeholders may incorporate into the enterprise selection process:-

Stage 1: The final enterprise mapping study reports, and enterprise screening sheets shall be disseminated to all the workshop participants to enhance their knowledge on all the major different enterprise options.

Stage 2: The stakeholders shall review the proposed selection criteria with the Consultant during the workshop.

Stage 3: The enterprise mapping study reports shall be reviewed by each invited stakeholder (respondent) prior to the workshop and the respondent shall screen independently the potential enterprises using the enterprise screening sheets provided. The screening shall be done for both Uganda and Rwanda Projects.

Stage 4: The enterprise screening results from each respondent for each country shall be entered into the consolidated enterprise screening sheets for further analysis and ranking. The best five enterprises with best results shall be selected for each country.

Stage 5: The five potential enterprises selected for each country shall further be reviewed by the NRM experts and project team. The comments and observations from the team on the five enterprises shall then be presented to the workshop participants. During this stage, the participants shall be allowed to brainstorm on the comments and observations.

Stage 6: The workshop participants finally using the comments and observations from the technical team shall approval 2-3 suitable enterprises for each of the country project. Building consensus shall be critical at this stage.

Some of the proposed Selection Criteria

No.	Criteria	Description	Score	Max
1.	NRM/Conservation Related Factors	Potential to reduce Human-wildlife conflicts (e.g., buffer crops)	4	20
		Compatibility with sustainable farming systems and lack of risks to increase environmental threats (e.g., invasive species).	4	
		High productivity per land unit	2	
		Create alternative of natural resource base	2	
		Promote soil and water conservation	2	
		Promote energy conservation	2	
		Does not add pressure to PA resources	4	
2.	Market demand and growth potential	Strong effective market demand	3	13
		Availability of ready market	3	
		Unmet demand in the market	3	
		Regional opportunities / dimensions	2	
		Market Characteristics: Growing (size, volumes, price), stable, location and Competitive analysis	2	
3.	Government Strategic interest/ Development partners – support programs are existing to facilitate development	Central and local government have strategic interest in the enterprise (already supporting or intent)	1	2
		Development partners have interest and are already providing assistance through other projects	1	
4.	Community Development and Social Factor	Enterprise can generate employment opportunities for local community	2	16
		Vulnerable people are already engaged in the enterprise	2	
		The enterprise can be adopted easily by the vulnerable people	2	
		Social sustainability: potential for involvement of beneficiaries, social acceptability and availability of suitable process.	2	
		Likely timeframe to achieve impact	2	
		Location: preference to capacity to reach PA neighbors	2	
		Equity: capacity to involve vulnerable groups base don gender, wealth, access to land, marginalization.	2	
		Coherence with national development plans and polices.	2	
5.	Opportunities for linkages	Potential for backward and forward linkages with buyers exist	2	

		Potential buyers have high demand for products but lacks linkages with the producers	2	6
		Enterprise provides vital inputs to other enterprises	2	
6.	Value added Potential	Enterprise has potential for value addition	4	10
		Spin-Offs potential.	2	
		Diversification potential.	2	
		Appropriate simple and affordable technology can be used for value addition	2	
7.	Economic Feasibility	Potential for increased revenues at all levels	4	10
		Potential to generate profit	2	
		Investment cost is affordable for target group	2	
		Availability / stability of human capital, raw materials, processing equipment, packaging, etc	2	
8.	Organization and management potentials	Large number of target beneficiaries operating in the value chain	3	10
		Existing associations, cooperatives, and farmer groups & other SEs	2	
		Enterprise setup clearly defined and developed with some basic value chain infrastructure	3	
		Need for BDS and TA requirements – now and in the future	2	
9.	Enterprise is a going Concern	Enterprise is already practiced by target groups	3	6
		Enterprise exist but operating in small scale	2	
		Enterprise exist but in pilot phase of development	1	
10.	Project Objective and mandate Achievable	Mandate of the project can be achieved such as focus on women, rural poor, sustainable natural resource management.	7	7
		TOTAL		100

CONCLUSION AND RECOMMENDATIONS

During the process of undertaking the review of this mapping exercise numbers of key stakeholders were consulted in order to validate data collected and identify new opportunities (ENM study identified four enterprises – barley, mushroom, Irish potato, and Beekeeping but however, through the review process additional enterprises with high potential has been identified through consultative process such as livestock – goat and pig, coffee, tea, sorghum, and beans. Based on the survey conducted and discussions held with key informants, potential enterprises were identified together with key stakeholders to accelerate the process of selection of 2-3 enterprises. After further clarification and contributions from the stakeholders, the final list of most promising enterprises have been developed which include beekeeping, Irish potato, beans, sorghum, goat, piggery, coffee, tea, barley and mushrooms based on economic uniqueness in the target district. This exercise was important in that, it helped to understand the perception of the market opportunities, understanding the dynamics of existing relationships identify the strong ones and get to know the barriers to better cooperation. Raising market players' awareness of opportunities for value chain collaboration and deepening their understanding of the causes of market failure. Helping to buy-in to project objectives and pave the way for market players' and other stakeholders' involvement in project activities in the different sub - counties and districts. Further it helped to develop contacts and relationships with stakeholders and market players and finally, identifying market champions who would help with project implementation or who early adopters are of market opportunities the project promotion. The next stage is for the project management team to review this report and made necessary adjustments in the ENM study done in April 2008 in order to select 2-3 promising options.

ANNEXES

Annex 1: Terms of Reference

Annex 2: Field Enterprise Assessment Findings

Annex 3: Profile of Consultant

Annex 4: Field work schedule

Annex 5: Map of Kanungu and Kisoro Districts

Annex 6: List of People Consulted

Annex 7: Potential Enterprises Summary

Annex 8: List of References Consulted

Annex 1: Terms of Reference



Terms of references

Task: REVIEW OF ENTERPRISE NETWORK MAPPING RESULTS

1. Background on the activity

The table below summarizes the relevant EEEGL work plan items with regard to enterprise development.

<p>Enterprise</p> <p>1. Ecotourism and other enterprise activities that support sustainable NRM and are conflict sensitive have been developed and promoted, and market access at local, national and regional levels improved.</p>	<p>1.1 Conduct an assessment of local, national, and trans-boundary enterprise opportunities to shortlist 2-3 most promising options per country that will support sustainable NRM.</p>	<p>In its support for community-based enterprise beyond ecotourism, the program will use an approach that emphasizes the creation of market linkages between poor micro-entrepreneurs in the informal sector, and the formal private sector. Key principles of this approach include:</p> <ul style="list-style-type: none"> ⇒ Start with the market and work backwards; ⇒ Formally engage the private sector, e.g. through forward contracts with buyers/suppliers; ⇒ Support establishment of “gateway agencies” that aggregate supply and/or demand; and ⇒ Formalize ownership of production and marketing organizations – making the poor genuine shareholders in the larger business. <p>Applying this approach to agricultural and other natural resource-based products within the target area, the program will aim to identify two to three of the most promising enterprise opportunities in each country. In the context of this program, the is potential to generate benefits to local communities, including marginalized and vulnerable groups, and potential to support sustainable NRM either by adding value to resources that can be legally and sustainably harvested from protected areas, or by providing alternatives to the use of natural resources that are currently being exploited. This process will start with a broad scoping exercise reviewing all significant opportunities based on fieldwork and secondary sources which produce a shortlist of two to three of the most promising options. At this stage we cannot predict which enterprises will be selected, but the list in each country is likely to include some of the following: agricultural commodities (e.g., beans, potatoes, coffee), charcoal and fish (DRC only), honey, and medicinal herbs (where there is a rapidly growing market for remedies that alleviate the symptoms of AIDS). In terms of markets, the program will address local, national, regional, and global markets. Opportunities exist at all levels, but in terms of this program, the regional level clearly has particular potential.</p>
	<p>1.2 In-depth market analysis for short-listed options: reviewing of regulations, availability of raw material and technology, input supply, production capacity, processing and value addition, transportation, analysis of business viability.</p>	<p>The in-depth analysis of short-listed options will use the sub-sector analysis methodology that examines the whole market chain from primary producer to end buyer. This analysis includes reviewing local regulations, availability of raw material and technology, inputs supply, production capacity, processing and value addition, transportation, and business viability and risk assessment. The aim of the analysis is to identify the critical “bottlenecks” and other key constraints that should be the target of program intervention.</p>
	<p>1.3 Support development of most promising</p>	<p>Support for selected enterprises will include:</p> <ul style="list-style-type: none"> ⇒ Collection and dissemination of market information;

<p>enterprises : access to market information, business and marketing capacity building, facilitation of market linkages and contracts, support for production/marketing associations, improved processing to add value etc.</p>	<ul style="list-style-type: none"> ⇒ Technical training in production, harvesting and processing to maximize value addition, and ensure ecological sustainability; ⇒ Capacity building in business and marketing skills; ⇒ Facilitation of market linkages between buyers, producers, and input suppliers; and ⇒ Establishment of new business entities for production/marketing (where appropriate), and guidance in developing forward contracts with buyers, and input suppliers <p>For example with charcoal, (which seems highly likely to be selected as a priority product for DRC based on assessments recently conducted by WWF), program support on the production would include materials and forestry extension services to support on-farm planting of suitable species, and training in more efficient charcoal production techniques that can substantially improve the efficiency of conversion of wood to charcoal. On the marketing , support would include, as a minimum, provision of market information on charcoal prices in major markets (Goma, Gisenyi, Kisoro) and facilitation of market linkages and training in marketing skills to enable producers to achieve a better price. In addition, where there is an opportunity to establish a formal business relationship with charcoal buyers, producers will be assisted to establish a collective business entity that can aggregate supply from many producers and negotiate forward contracts with major buyers.</p>
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Additional references:

1. CARE MMW4TP: PLEASE ALL DOWNLOAD AND READ FROM:
[www.care.ca/downloads/publ/MakingMarketsWork-V1\(wproposals\)E.pdf](http://www.care.ca/downloads/publ/MakingMarketsWork-V1(wproposals)E.pdf)
2. EEEGL prodoc.
3. Minutes of the team meeting, Enterprise development, October 2007
4. TOR Enterprise network mapping.
5. Minutes of the team meeting, Enterprise selection criteria, April 2008.
6. Enterprise network mapping report, DRC
7. Enterprise network mapping report, Uganda
8. Enterprise network mapping report, Rwanda.

Status

- ⇒ The EEEGL team in each country (DRC, Uganda, and Rwanda) has carried out a broad scoping exercise (Enterprise Network Mapping or ENM) to identify at a general level the potential of opportunities for enterprise development relevant to the programme target area and scope of work.
- ⇒ This preliminary reconnaissance was intended to provide a baseline for the subsequent selection of the sub-sectors the project should focus on, as well as for laying the groundwork for sub-sector analyses.
 - a. Enterprise development by EEEGL at the initial stages should not necessarily be limited to NRM priorities or park /biodiversity threat related enterprises, but we should start with casting the net very widely.
 - b. The findings of the ENM will be reviewed later through a process which will analyze and screen enterprise development opportunities based on 4 filters to be further refined through more project work and analysis in other relevant themes:
 - i. NRM relevance

- ii. Equity relevance
 - iii. Business potential and feasibility
 - iv. Availability of programme resources
- ⇒ The results of this work, in terms of identification of enterprise development opportunities and preliminary market research, followed by a selection of 3-4 sectors per country, are to be followed by a sub-sector market analysis of the selected sectors. These SSA should provide the project with clear and detailed entry points to support enterprise development in the sectors and areas of intervention.
- ⇒ The team has also produced a preliminary set of criteria for the selection of enterprises base on the four broad factors recognized above.
- ⇒ In Uganda the programme has also undertaken a pilot trial of a private-community business linkage through a contract farming arrangement for barley production (see report).
- ⇒ In DRC the programme, in view of the context of conflict, general insecurity, lack of food security, and extensive protracted displacement of the population, has shifted the focus of the programme on food security type of interventions.

Objectives of the consultancy

The EEEGL programme seeks the services of a qualified consultant to achieve the following objectives:

1. Complete the enterprise network mapping study in Rwanda (separate TOR) through literature review, meetings with business actors, gateway agencies, BDS agencies, producer organizations, traders, etc.
2. Conduct an external evaluation and review of the enterprise network mapping study carried out in Uganda, with a view to provide advice on the initial enterprise opportunity identification study and priorities to fill major gaps, if any.
3. Deliver a value chain analysis of the mushroom sector in Rwanda (target area for production includes the districts of Musanze, Burera, Nyabihu and Rubavu .
4. Participate and facilitate a workshop to:
 - a. Confirm the selection of priority sectors for farther market analysis in Uganda and Rwanda, based on the findings of the EOM studies.
 - b. Identify and detail the scope of work for follow up actions in terms of sub-sector analysis and BDS assessment and design for the selected sectors in the two countries.

Tasks

1. Enterprise Opportunity mapping study in Rwanda: sub -TOR in annex - 1.
2. Mushroom value chain: sub-TOR in annex-2.
3. Review of CARE Uganda EOP study (attached):
 - a. Review of study report;
 - b. Identification and review of relevant literature (market studies, BDS assessment, etc)
 - c. Meetings with CARE team

- d. Meetings with key players:
 - i. Locally based BDS service providers, Local processors and producer / marketing Associations in Kabale, Kanungu and Kisoro Districts
 - ii. Kampala based stakeholders, e.g. indicatively (list to be updated by the consultant): Uganda Industrial Research Institute, NAADS secretariat, UBL, Uganda National Agro-input Dealers Association, supermarkets
 - e. Output: brief review report with technical recommendations to address identified gaps, including market opportunities for enterprises outside agribusiness sectors.
4. Workshop on enterprise selection:
- a. Participate in and facilitate a workshop involving EEEGL team members and key partners/counterparts
 - b. Support the review of selection criteria for enterprise identified for SSA
 - c. Guide the team to decide on enterprises for further program support in the two countries

Outputs

1. Report on Enterprise Network mapping in Rwanda
2. Report on the mushroom sub-sector analysis in Rwanda
3. Brief report on the review of Uganda ENM study with technical recommendations to address identified gaps.
4. Report of the workshop on enterprise selection showing the list of selected enterprise for program support during project life period.

Timeframe

Task	Time inputs
Desk review	2
Report on Enterprise Network mapping in Rwanda	12
Report on the mushroom sub-sector analysis in Rwanda	10
Brief report on the review of Uganda ENM study with technical recommendations to address identified gaps.	6
Workshop on enterprise selection	3
Reporting	4
	37

Annex 2: Field Assessment District Findings

1. List of Current Enterprises in Kabale District

Enterprise	Sub county: Ikumba and Muko					
	Kitojo	Mushanje	Nyamabale	Kashasha	Kiyebe	Kara
TOURISM						
Hotel & Restaurant	√	X	X	X	X	X
Tour & Travel	√					
Community Tourism	√	X	√	X	√	X
TRANSPORT						
Passenger Transport	√	X	X	√	X	X
Cargo Transport						
TELECOMMUNICATION						
Mobile Phone Business	√	√	√	√	√	√
Internet Café	X	X	X	X	X	X
GENERAL TRADE						
Supermarket	X	X	X	X	X	X
Input Supply	X	√	X	√	X	X
Beauty Saloon	X	X	X	X	X	X
Secretarial Bureau						
Market Vending	√	X	X	X	√	X
CEREALS						
Wheat	X	X	X	X	X	X
Barley	√	X	√	√	X	X
Rice	X	X	X	X	X	X
Maize	X	X	X	X	X	X
Sorghum	√	√	√	√	√	√
PULSES						
Climbing Beans	√	√	√	√	√	√
Groundnuts	X	X	X	X	X	X
Cowpeas	X	X	X	√	√	√
Soya Beans	X	X	X	X	X	X
TUBERS						
Cassava	X	X	X	X	X	X
Sweet Potato	√	√	√	√	√	√
Irish Potato	√	√	√	√	√	√
LIVESTOCK						
Cattle	X	X	X	X	X	X
Goats	√	√	√	√	√	√
Sheep	X	X	X	X	X	X
Poultry	X	X	√	X	X	X
Piggery	√	√	√	√	√	√
Dairy	X	X	X	X	X	X
Rabbit	X	X	X	X	X	X
Beekeeping	√	√	√	√	√	√
Fish farming	X	X	X	X	X	X
HORTICULTURE						
Flowers	X	X	X	X	X	X

Enterprises	Kitojo	Mushanje	Nyamabale	Kashasha	Kiyebe	Kara
Passion Fruits	√	X	X	X	√	X
Pineapples	X	X	X	X	X	X
Apples	X	X	X	X	X	X
Carrots	X	X	X	X	X	X
Cabbages	X	X	X	√	√	√
Tomatoes	X	X	X	X	X	X
Avocado	√	√	√	√	√	X
Mushrooms	X	X	√	X	X	X
SPICES	X	X	X	X	X	X
Garlic	X	X	X	X	X	X
Chili	X	X	X	X	X	X
Onion	X	X	X	X	X	X
OIL SEEDS						
Sunflower/Cauliflowers	X	√	√	√	X	X
OTHERS						
Local Tobacco	X	X	X	X	X	X
Banana	X	X	X	X	X	X
Artemisia	X	X	X	X	X	X
Handicraft	√	X	X	√	X	X
Fuel Wood	√	X	X	X	√	X
Tree Planting	√	√	√	√	√	X
Tea	√	X	X	X	X	X
Pyrethrum	X	X	X	X	X	X
Hides and skins	X	X	X	X	X	X

2. List of Current Enterprises in Kisoro District

Enterprise	Sub county: Bukimbiri, Kirundo, Nyabwishenya, Nyarusiza & Muramba					
	Remera	Rubuguri	Nteko	Rukongi	Gitenderi	Gisozi
TOURISM						
Hotel & Restaurant	X	√	√	X	X	X
Tour & Travel	X	X	X	X	X	X
Community Tourism	√	√	√	√	√	√
TRANSPORT						
Passenger Transport	√	√	√	√	√	√
Cargo Transport	√	√	√	√	√	√
TELECOMMUNICATION						
Mobile Phone Business	√	√	X	X	X	X
Internet Café	X	X	X	X	X	X
GENERAL TRADE						
Supermarket	X	X	X	X	X	X
Input Supply	√	X	X	√	√	√
Beauty Saloon	X	X	X	X	X	X
Secretarial Bureau	X	X	X	X	X	X
Market Vending	√	√	√	√	√	√
CEREALS						
Wheat (local) MINIAGRI	√	X	X	√	√	√
Barley	X	X	X	X	X	X
Rice	X	X	X	X	X	X
Maize	√	√	√	√	√	√
Sorghum	√	√	√	√	√	√
PULSES						
Climbing Beans	√	√	√	√	√	√
Groundnuts	X	X	X	X	X	X
Cowpeas	X	X	X	X	X	X
Soya Beans	X	X	X	X	X	X
TUBERS						
Cassava	X	X	√	X	X	X
Sweet Potato	√	√	√	√	√	√
Irish Potato	√	√	X	√	√	√
LIVESTOCK						
Cattle	X	√	√	X	X	X
Goat	X	√	√	X	X	X
Sheep	X	√	√	X	X	X
Poultry	X	X	X	X	X	X
Piggery	X	X	X	X	X	X
Dairy	X	√	X	X	X	X
Rabbit	X	X	X	X	X	X
Beekeeping	√	√	√	√	√	√
Fish farming	√	√	X	X	X	X
HORTICULTURE						
Flowers	X	X	X	X	X	X

Enterprises	Remera	Rubuguri	Nteko	Rukongi	Gitenderi	Gisozi
Passion Fruit	X	√	√	X	X	X
Pineapple	X	√	X	X	X	X
Apple	X	X	X	X	X	X
Carrot	X	X	X	X	X	X
Cabbage	X	X	X	√	√	√
Tomato	X	X	X	X	X	X
Avocado	X	X	X	X	X	X
Mushroom	√	√	√	√	√	√
SPICES						
Garlic	X	X	X	X	X	X
Chili	X	X	X	X	X	X
Onion	X	X	X	X	X	X
OIL SEEDS						
Sunflower/Cauliflowers	X	X	X	X	X	X
OTHERS						
Local Tobacco	X	X	X	X	X	X
Banana	X	X	X	X	X	X
Artemisia	X	X	X	X	X	X
Handicraft	X	X	√	X	X	X
Fuel Wood	X	√	√	X	X	X
Tree Planting	X	X	X	X	X	X
Tea	X	√	√	X	X	X
Pyrethrum	X	X	X	X	X	X
Hides and skins	X	X	X	X	X	X

3. List of Current Enterprises in Kanugu District

Enterprise	Sub county: Kayonza, Kirima, Town Council, Rutenga, Mpungu													
	Mukono	Bujengwe	Karangara	Ntungamo	Bushura	Rubimbwa	Rutugunda	Southern Ward	Kinaba	Muramba	Ngara	Mpungu	Burema	Muramba
TOURISM														
Hotel & Restaurant	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Tour & Travel	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Community Tourism	X	X	X	X	X	X	X	X	X	X	X	X	X	X
TRANSPORT														
Passenger Transport	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Cargo Transport	X	X	X	X	X	X	X	X	X	X	X	X	X	X
TELECOMMUNICATION														
Mobile Phone Business	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Internet Café	X	X	X	X	X	X	X	X	X	X	X	X	X	X
GENERAL TRADE														
Supermarket	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Input Supply	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Beauty Saloon	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Secretarial Bureau	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Market Vending	X	X	X	X	X	X	X	X	X	X	X	X	X	X
CEREALS														
Wheat (local) MINIAGRI	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Barley	X	X	X	X	X	X	X	X	√	√	X	X	X	X
Rice	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Maize	X	X	X	X	X	X	X	X	X	X	√	X	X	X
Sorghum	X	X	X	X	X	X	X	X	X	X	X	X	X	X
PULSES														
Climbing Beans	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Groundnuts	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Cowpeas	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Soya Beans	X	X	X	X	X	X	X	X	X	X	X	X	X	X

Enterprises	Mukono	Bujengwe	Karangara	Ntungamo	Bushura	Rubimbwa	Rutugunda	Southern Ward	Kinaba	Muramba	Ngara	Mpungu	Burema	Muramba
TUBERS														
Cassava	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Sweet Potato	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Irish Potato	X	X	X	X	X	X	X	X	√	√	√	X	X	X
LIVESTOCK														
Cattle	X	X	X	X	X	X	X	√	X	X	X	X	X	X
Goat	√	√	√	√	√	√	√	√	√	√	√	X	√	√
Sheep	X	X	X	X	X	X	X	X	√	√	X	X	X	X
Poultry	X	X	X	X	√	√	√	X	X	X	X	X	X	X
Piggery	√	√	√	√	X	X	X	√	√	√	√	√	√	√
Dairy	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Rabbit	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Beekeeping	√	√	√	√	√	√	√	√	√	√	√	√	√	√
Fish farming	√	√	√	√	X	X	X	X	X	X	√	√	√	√
HORTICULTURE														
Flowers	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Passion Fruit	X	X	X	X	√	√	√	√	X	X	X	X	X	X
Pineapple	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Apple	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Carrot	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Cabbage	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Tomato	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Avocado	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Mushroom	X	X	X	√	X	X	X	X	X	X	X	X	X	X
SPICES														
Garlic	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Chili	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Onion	X	X	X	X	X	X	X	X	X	X	X	X	X	X
OIL SEEDS														
Sunflower/Cauliflowers	X	X	X	X	X	X	X	X	X	X	X	X	X	X
OTHERS														
Local Tobacco	X	X	X	X	X	X	X	X	X	X	X	X	X	X

Enterprise	Mukono	Bujengwe	Karangara	Ntungamo	Bushura	Rubimbwa	Rutugunda	Southern Ward	Kinaba	Muramba	Ngara	Mpungu	Burema	Muramba
Banana	√	√	√	X	X	X	X	X	X	√	√	√	X	X
Artemisia	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Handicraft	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Coffee	√	√	√	√	√	√	√	√	X	X	√	√	√	√
Fuel Wood	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Tree Planting	X	X	X	X	X	X	X	√	√	√	X	X	X	X
Tea	√	√	√	√	√	√	√	√	√	√	√	√	√	√
Pyrethrum	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Hides and skins	X	X	X	X	X	X	X	X	X	X	X	X	X	X

Annex 3: Profile of Consultant

Habib Tibrichu: Has over 13 years' extensive hand-on skills and experience in designing and implementing BDS projects in Uganda. He has a Diploma in Market Oriented Small Business Development Services, Italy Turin and a post graduate Diploma in Business Management. He has a Bachelors Degree in Public Administration and a certificate in BDS Program Design, Financial Accounting/Taxation, and consultancy development services.

He worked for three years with a World Bank funded Business Uganda Development Scheme (Matching Grant Scheme) under the Private Sector Competitiveness Project and later worked with the USAID funded Support for Private Enterprise Expansion and Development (SPEED) as BDS Specialist. He has designed and implemented a BDS program on MSMEs Consultancy Best Practices in Mbarara and Lira. He carried out socio-economic impact assessment on modern energy use and BDS for Shell Foundation, UK. He developed BDS provider's roster. He designed BDS interventions for Honey, Pyrethrum, Maize, Fish farming, and Coffee sub sectors under the USAID funded Productive Resources Investment for Managing the Environment (PRIME-West).

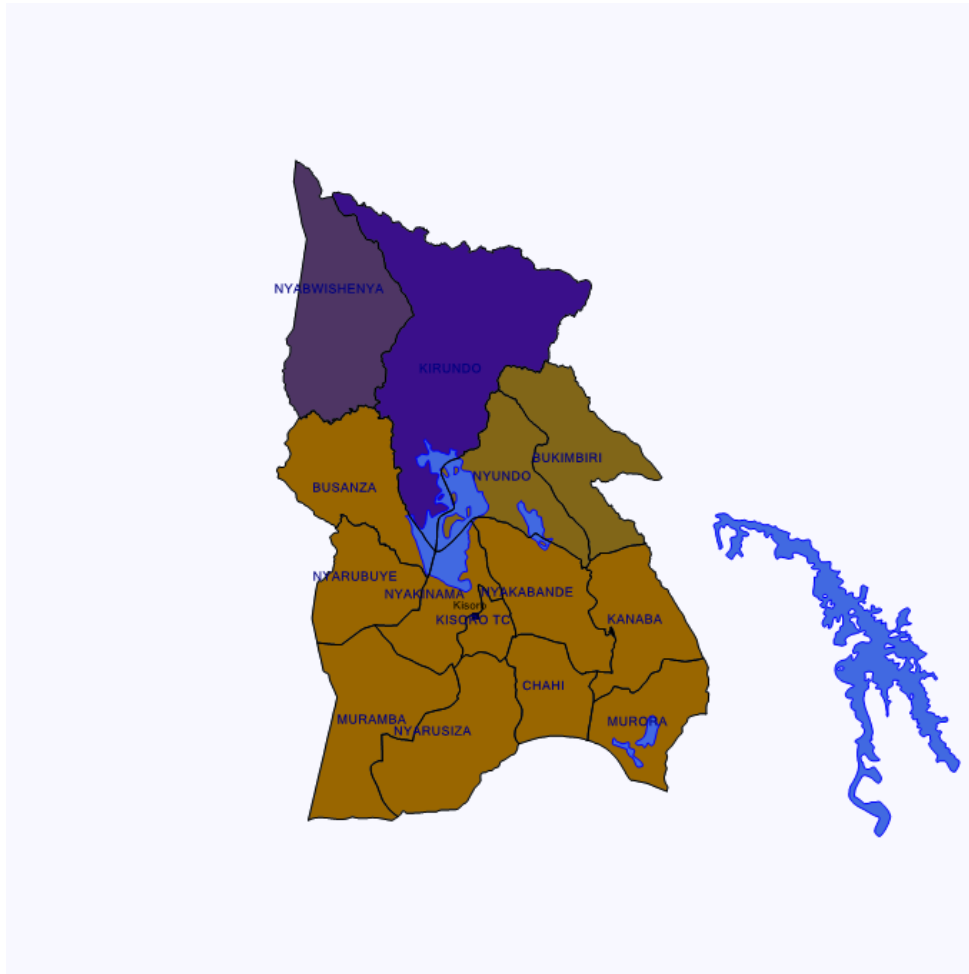
He participated in the design of West Nile Region Development Concept program funded by GTZ and DANIDA. He coordinated Solar PV training program for rural solar technicians in 14 districts in Uganda on behalf of BUDS ERT/PSFU. He developed and implemented on behalf of BUDS ERT/PSFU Productive Energy Use Campaign in West Nile region in partnership with WENRECo. He carried out impact evaluation of a matching grant scheme called SME Competitiveness Facility in Tanzania funded by DANIDA. He provides BDS support services to DANIDA funded ASPS ABDC project on agribusinesses based on framework sub contract to date. He is part of the team of consultants reviewing and re-designing the financial accounting, inventory and procurement systems for Joint Clinical Research Centre (JCRC). The Consultant carried out short term consultancies for CARE international in Uganda in the fields of BDS, mid term review KBDS end of Project Evaluation and sesame project assessment. Coordinated 2 months Export logistics for Midland Holdings Ltd for exports of Maize flour, Maize grains, cooking oil, and Salt to Juba, Southern Sudan. He carried out Consumer Market Survey for Fresh Cuts Ltd on meat products in Kampala, Uganda.

His expertise are in: BDS program design and implementation (Matching Grant, Voucher Program, and Embedded Business Services), monitoring and evaluation, financial planning and management, training, business diagnostic and planning, strategic planning for institutions, solar market development, competitive service providers procurement, human resource management, sub sector analysis and project impact evaluation.

Annex 4: Field Study Schedule

Date	Activity	Place
17/11/2008	Literature Review and Meeting with EEEGL Staff	Kabale Office
18/11/2008	Meeting with relevant district officials in Kabale district and NGOs, private enterprises such as MTRC, UNSPA, local market	Kabale Municipality
19/11/2008	Meeting with different enterprises, farmer groups, and associations / travel to Kisoro	Ikumba and Muko sub counties
20/11/2008	Meeting with relevant district officials of Kisoro district and NGOs, processors, and visit to the local markets	Kisoro town
21/11/2008	Meeting with farmer groups, associations and sub county officials	Nyarusiza, Kirundo, Nyabwishenya
22/11/2008	Travel back to Kabale/ meet with UBL agent in Kabale	Kabale town
23/11/2008	SUNDAY	
24/11/2008	Travel to Kanungu through Rutenga, meet farmer groups, commercial farmers and other actors including sub county and district officials	Rutenga/Kanungu
25/11/2008	Meeting with different enterprise actors including farmer groups, processors and traders	Kirima, Kayonza, Mpungu
26/11/2008	Travel back to Kabale	
27/11/2008	Meet the district officials in Kabale and visit supermarkets	Kabale Town
28/11/2008	Travel to Kampala to meet UIRI, UBL, NAADS, supermarkets etc	Kampala
-	Drafting the Report	Kampala

Kisoro District Map



Annex 6: List of People Consulted

No	Names	Title	Organization	Location	Activity	Telephone
1.	Benda	Project Manager	EEEGL Uganda	Kabale	Project Mgt	0772-358052
2.	Helen	Enterprise Dev't Officer	EEEGL Uganda	Kabale	Project Mgt	
3.	Geoffrey	NRM Officer	EEEGL Uganda	Kable	Project Mgt	
4.	Peace Byandusya	Centre Manager	Mushroom Training & Resource Center	Kabale	Mushroom	0772-658883
5.	Rajas Akatwijuka	NAADS Coordinator	NAADS –Kabale District	Kabale	Local Govt	0772-670508
6.		District Forestry Officer	Kabale Local Government	Kabale	Local Govt	0772-421774
7.	Kasimbazi James	District Agriculture Officer	Kabale Local Government	Kabale	Local Govt	0772-492617
8.	Federica Nshemereirwe	National Project Coordinator	FAO Project on Food Security	Kabale	Project Mgt	0772-387928
9.	Nkavamahanga Samuel	Sub County NAADS Coordinator	Ikumba Sub County, Kabale District	Kabale	Local Govt	0782-994592
10.	Tindimubana	Chairman	UNSPPA	Kabale	Potatoes	0772-657621
11.	Silas M. Turyagyenda	Farmer	Kamuhoko -Nyamabale	Kabale	Mushrooms	0775-729766
12.	Twesiga William	Chairman	Kashasha Barley Farmers Assoc	Kabale	Barley	0774-678664
13.	Edgar	NAADS Coordinator	Kisoro Local Government	Kisoro	NAADS	0702-386284
14.	Nyiramugisha Peace	Farmer	Mushroom Grower	Kisoro	Mushrooms	0782-322654
15.	Niyonzima Jackson	LC III Chairperson	Nyarusiza Sub county	Kisoro	LG	0775-474350
16.	Ngabiramo Kizito	Manager	Kisoro Beekeeping Community	Kisoro	Honey	0782-776729
17.	Komushana Rosemary	Secretary	Kirundo Sub County	Kisoro	LG	0775-776996
18.	Tumusiime Stephan	Farmer	Beekeeper	Kisoro	Honey	0782-329008
19.	Ntawapuhunga Simeo	Farmer	Nushroom Grower	Kisoro	Mushrooms	-
20.	Tiwangye M. Simon	Chairman FF	NAADS Farmers Forum	Kisoro	PO	0703-269544
21.	Mrs. Aweria Mihanda Ngendahimana	LC III Chairperson	Nyabwishenya Sub County	Kisoro	LG	-
22.	Twebaze Alex	District Planner	Kabale District	Kabale	LG	0772-370506
23.	Kobusingye Pamela	Secretary DP	Kabale	Kabale	LG	0782-772970
24.	Yasin Lemeriga	Manager National Metrology Laboratory	Uganda National Bureau of Standards	Kampala	Standards	0772-459605
25.	Rubalema Joseph	Ag. Director Product Development	Uganda Industrial Research Institute	Kampala	Irish Potato	0782-048295

26.	Ms. Deborah Wendiro	Research Officer Micro Biology	Uganda Industrial Research Institute	Kampala	Mushrooms	0712-206335
27.	Murangira James	Manager Micro Biology	Uganda Industrial Research Institute	Kampala	Mushrooms	0712-452697
28.	Dr. Francis Byekwaso	Director	NAADS	Kampala	NAADS	0772-775134
29.	Mainar	Production Manager	Uganda Breweries Ltd	Kampala	Barley	-
30.	Asiimwe Marcel	Group Manager	Kayonza Growers Tea Factory Ltd	Kanungu	Tea	0772-425416
31.	Daniel Ngirabakunzi	Managing Director	Kisoro Honey Producers	Kisoro	Honey	0712-746118
32.	Asiimwe Emmanuel	Sub County Chief	Rutenga	Kanungu	LG	0782-322340
33.	Bernard K.	NAADS Coordinator	Rutenga	Kanungu	LG	0772-692292
34.	Dr. Tumwesigye Aloysius	Ag. Production Coordinator	Kanungu Local Government	Kanungu	LG	0772-283596
35.	Saturday Jackson	Senior Planner	Kanungu Local Government	Kanungu	LG	0772-563737
36.	Kamondo Leonard	Ward Agent	Kanungu Town Council	Kanungu	LG	0773-211175
37.	Galyanga Tom	Production Coordinator	Kirima Sub County	Kanungu	LG	0774-142922
38.	Namara Vincent	Sub County Chief	Kirima Sub County	Kanungu	LG	0782-820354
39.	Kanbwande Sam	LC III	Kayonza Sub County	Kanungu	LG	0772-868762
40.	Kabami Sebasore Robinah	Community Development Officer/ Ag, S/C Chief	Kayonza Sub County	Kanungu	LG	0772-282711
41.	Tumusiime Stephen	Businessman	Rubunguri Sub county	Kisoro	Honey	0782-329008
42.	Kyokunda Grace	Board Member	KEBCO	Kisoro	Honey	0772-394489
43.	Francis	Factory Manager	KEBCO	Kisoro	Honey	0782-615749
44.	Hussein Nimenya	CBT/ Beekeeper	Kisoro	Kisoro	Honey	-
45.	Telesa Gasana	Staff	Wine processor	Kanungu	Processor	0772-619153
46.	Tukesiga Richard	Chairman	Kabale Passion Fruit Traders Ass	Kabale	Traders	-

Annex 7: ENM Study Report

1.0 Introduction:

This report presents results of an enterprise scoping exercise. The first section outlines the rationale, objectives, and methodology. The second section presents the result. This includes the Natural Resource Management issues relevant to enterprise selection, markets and communication infrastructure for facilitating markets, and major findings from interaction with various actors. The third section gives summarized information on a wide range of enterprises generated from the scoping exercise in terms of opportunities, gaps, potential interventions and required infrastructure for enhancing productivity and commercialization. It concludes with proposals regarding shortlist of enterprises for further value chain analysis in line with activity 1.2 of EEEGL project

1.1 Background to the activity

Enterprise, Environment and Equity program addresses the inter-related problems of poverty, conflict, and environmental degradation within the Virunga landscape that lies in the trans-boundary region of Rwanda, Uganda, and the Democratic Republic of Congo (DRC). This is a densely populated, mountainous area where livelihoods of local people are largely dependent on agricultural production. At the heart of this landscape are the natural forests of the Virunga Volcanoes and Bwindi. These forests make a major contribution to local livelihoods, particularly through water catchment and revenue generated from mountain gorilla tourism and associated enterprise. The program is formulated around four major themes, namely enterprise development, participatory natural resource management, community empowerment and trans-boundary collaboration and learning.

Under the enterprise theme the expected result is that:

“Ecotourism and other enterprise activities that support sustainable natural resource management and are conflict sensitive have been developed and promoted and market access at local, national and regional levels improved”

In its support for community-based enterprise beyond ecotourism, the program will use an approach that emphasizes the creation of market linkages between poor micro-entrepreneurs in the informal sector, and the formal private sector. Key principles of this approach include:

- Start with the market and work backwards;
- Formally engage the private sector, e.g. through forward contracts with buyers/suppliers;
- Support establishment of “gateway agencies” that aggregate supply and/or demand; and
- Formalize ownership of production and marketing organizations – making the poor genuine shareholders in the larger business.

Applying this approach to agricultural and other natural resource-based products within the target area, the program planned to identify two to three of the most promising enterprise opportunities in each country. In the context of this program, the key criteria are potential to generate benefits to local communities, including marginalized and vulnerable groups, and potential to support sustainable NRM either by adding value to resources that can be legally and sustainably harvested from protected areas, or by providing alternatives to the use of natural resources that are currently being exploited. Since October 2007, this process started with a broad scoping exercise reviewing all significant opportunities based on fieldwork and secondary sources which produce a shortlist of two to three of the most promising options.

Activity 1.2: In-depth market analysis for short-listed options: reviewing of regulations availability of raw material and technology, inputs supply, production capacity, processing and value addition, transportation, and analysis of business viability. The in-depth analysis of short-listed options will use the sub-sector analysis methodology that examines the whole market chain from primary producer to end buyer. This analysis will include reviewing local regulations, availability of raw material and technology, inputs supply, production capacity, processing and

value addition, transportation, and business viability and risk assessment. The aim of the analysis is to identify the critical “bottlenecks” and other key constraints that should be the target of program intervention.

1.2 Rationale and objectives

The scoping exercise (Enterprise Network Mapping or ENM) was conducted to identify at a general level potential opportunities for enterprise development relevant to the program target and scope of work. This preliminary reconnaissance was intended to provide a baseline for subsequent initial selection of the sub-sectors the project should focus on, as well as laying ground for sub-sector analyses. The big picture sought was to help the program team to better determine what micro-enterprises will work and those that will not in order to provide more informed opinion to the stakeholders and beneficiaries and minimize longer term risk on investment. The results of the ENM are to be reviewed via process that will analyze and screen enterprise development opportunities based on four filters namely, 1) NMR relevance; 2) Equity relevancy, 3) Business potential and feasibility and 4) availability of program resources. These filters were to be further refined through more project work and analysis in other relevant themes.

The specific objectives were:

- a) To improve understanding of project operating environment and map opportunities and resources available for enterprise development
- b) To provide an opportunity to hold wider consultations and disseminate information and increase project visibility.
- c) To better understand who else is out there , what they are doing and what resources they have
- d) To ensure avoidance of duplication, effective use of limited resources and optimizing impact
- e) To support the further scoping and clarification of EEEGL work on enterprise development domain
- f) To assist in better analysis if internal and external capacity

2 Methodology

2.1 Theoretical basis / framework

- The Enterprise Network Mapping process is based on the premise that communities are built on connections and that better connections usually provide better economic opportunities.
- Further postulates that networking will build sustainable communities through improving their interactions internally and externally- using network ties to create economic opportunities.
- Improved connectivity starts with a map- understanding the complex human system communities are embedded in. Net work maps provide a snap short of business environment communities are embedded in and can help identify intervention points, complementary partnerships and linkage opportunities.
- The seemingly disparate actors are often part of clusters- groups that perform similar roles, undertake similar sets of actions or working towards a common and often overarching objective. Therefore, it is useful to group the various actors into collective units or groups.
- Improved connectivity is created through an iterative process of identifying the actors in the network and understanding their core interests. Some of the actors in the network may have converging or overlapping interests by virtue of supplementary or complementary relationships
- The project is then placed as a hub in the network and various actors who may have direct or implied relationship are identified as stakeholders
- The ENM is carried out at the beginning of enterprise development and can be later re-iterated to broaden the scope of analysis and data gathering.
- An important first step in determining economic growth opportunities as well as enterprise and business development niches.

2.2 Methods / tools

The exercise involved gathering information from both primary and secondary sources. Some of documents reviewed were obtained in CARE sub-office library while others were collected from local government agriculture and marketing departments. Review of secondary data and existing sub-sector studies and market assessments was done on a wide range of value chains. Rapid market appraisal was conducted by visiting a few rural markets, stalls constructed under AAMP program, and supermarkets to gain insights to determine what products are on the market. Information on supply sources and competing products was obtained. Informal discussions were held with individuals of various service provider institutions, private business entities, and finally round table discussions with technical teams of three local governments of the project working area. Technical review meetings and workshops organized by other CARE and non - CARE projects were attended and they provided more information. Focus group discussions were also held with beneficiary groups as part of CSO mapping to determine the nature of enterprises they are involved in and the networks and value chain actors they deal with.

3.0 Enterprise network mapping results

3.1 NRM and Policy Context

3.1.1 The natural resource management context for enterprise development.

Food security and economic growth receive consistent attention by government, development and research organizations; however, attention to environmental degradation, and sustaining environmental services stays in the background. The attention to increasing agricultural outputs is often at the expense of sustainability of important agro-ecosystems such as the wet lands that are seasonally drained and cultivated in the project area. The major driving forces leading to unsustainable use of natural resources are increased human population levels, recurrent use of same resources which reduces the capacity to replenish their productivity, restricted livelihood options, and limitation of policies and institutional strategies.

The target area for EEEGL project (i.e Protected areas and neighboring communities) is characterized by rugged terrain and steep hills and mainly remote highlands that are challenged with the following realities:

- Small holdings with high incidents of fragmentation and unstable tenancy regimes (many people are renting land).
- Intensive soil and water losses and associated off-site effects due to agricultural expansion into marginal and hilly areas
- limited investment in conservation measures and maintenance of land cover;
- Nutrient depletion coupled with inability to replenish nutrients and to associated pests and diseases related to soil productivity decline which are affecting major cash and food crop yields
- Habitat destruction which threatens wild species for example encroachment on wetlands, forests and protected area, through burning, and through elimination of micro-habitats within agricultural land
- Depletion of forest ecosystems and tree biodiversity in farm based agro forestry systems, natural forests coupled with weak protection and land tenure policies
- Scarcity and inefficient use of water for agriculture, livestock and other competing uses within mountains themselves and along mountain to low land gradients.
- Human wildlife conflict issues such as crop raiding, poaching and
- Limited ability of livestock to positively contribute to the maintenance of the system is caused by poorly intensified feeding systems, poor link to markets and breakdown of traditional management systems. In some systems this is causing decline of grazing lands and leading to an increased number of conflicts
- Poor public services and infrastructure seriously limiting access to markets and credit

Interplay of these conditions limit the ability to cope, are leading to increased marginalization of park adjacent communities and exacerbating poverty in the project area. The economic conditions and policy environment have not provided the necessary incentive to the highland dwellers to make long term investments in better

management of their resources. The situation is worsened crop raiding in some areas, and increase in HIV and increased need for family labor to seek employment elsewhere.

On a positive note, the trend in decentralization offers the potential to increase the collective voice of poor farmers and could lead to better resource management, improved economies of scale in marketing and increased advocacy for more conducive policies.

The high population density exerts pressure on natural resource management and land productivity. With limited land increased productivity can be achieved through high value enterprises and increase in yields per unit area rather than on increased acreage. The land is being continuously cultivated without adequate rest, leading to declining soil fertility and low yields. Soil fertility management is important for sustainable crop production.

3.1.2 GoU Policy framework

During the recent past, enterprise development has received consistent attention by government development and research. There is substantive emphasis on value chain development and market linkages. The Ugandan agricultural sector has experienced rapid growth in recent years, which is attributed to trade policy reforms, expansion in area of cultivated land and enabling economic and political policies as outlined below.

Development policy framework (PEAP),

The poverty Eradication Action plan (PEAP) is Uganda's national framework against poverty and improving household livelihoods. The purpose of the PEAP is to provide an overarching framework to guide public action to eradicate poverty, defined as low incomes; limited human development and powerlessness. Economic management is one of the pillars of the PEAP where government aims to boost economic growth by the following measures among others: commercialisation of agriculture, with emphasis on value addition; and actions to improve rural access to financial services and to strengthen Small and Medium Enterprises (SME).

Plan for Modernisation of Agriculture (PMA)

The expansion of production and incomes in rural areas is addressed by a number of interventions which are grouped under the Plan for Modernisation of Agriculture (PMA). This plan focuses on agricultural modernization and commercialization by a multi-sectoral approach to addressing the constraints facing agriculture based livelihoods. PMA interventions include research and technology development, advisory services, rural financial services, rural infrastructure and sustainable natural resource management.

National Agricultural Advisory Services (NAADS)

With regard to agricultural extension policy, Under National Agricultural Advisory Services (NAADS) approach, extension services are delivered by private providers who are awarded short term contracts to promote specific enterprises. There is a coordinator at sub-county level who works with local community to identify priorities and manage allocation of contracts. Uganda's agricultural service is undergoing reorganization and reform inter alia in accordance with the aforementioned policy. The NAADS Act requires that for purposes of benefiting from NAADS services, farmer groups have to register with the sub-county and be issued with a certificate of registration.

Access to rural financial services

The Government of Uganda is implementing an initiative with International Fund for Agriculture Development (IFAD) and other development partners to promote better access to agricultural credit for small holders as well as promoting the expansion to rural areas of microfinance services through the Microfinance Outreach Plan (MOP). Implementation of the MOP has been underway since 2003. MOP experiences to date have involved the following problems associated with lending to farmers (Nathan et al. 2004):

- Seasonality: Borrowing for cultivation, repayment after season at the earliest.

- Difficulty of mobilizing farmers' savings
- High costs of credit
- A tendency for among farmers to “refuse strategically to repay”

Rural Development Strategy (RDS) & Integrated Support to Farmer Groups (ISFG)

As part of its PEAP and PMA, the government has developed the Rural Development strategy (RDS) to increase the impact of its agricultural programs. RDS is implemented through the following components among others:

- Provision of support to farmers groups, associations and cooperatives in order to build their capacity;
- Enhancing rural micro-finances provision
- Enhancement of markets access for agricultural produce through active linkage of farmer groups and processors / produce buyers.

The Integrated Support to Farmer Groups is an intervention intended to address the above objectives among others. The ISFG is designed to complement and strengthen activities already being executed by NAADS and is accordingly integrated into NAADS implementation procedures and processes. ISFG funding is intended to:

- Provide services to build capacity of farmer groups to form higher level farmer organizations and enhance their governance; engage in collective input access and output marketing, and promote group savings and credit access and management mechanisms and investment, including mobilizing and managing their own funds in the form of credit or revolving fund.
- Enhancing enterprise development among NAADS farmer groups by providing follow up agricultural advisory services and foundation technology to eligible groups
- Link NAADS farmer groups to Governments plan (MOP) to promote savings and expansion of savings and credit cooperative organizations (SACCOs), savings and credit Associations SCAs and other rural microfinance institutions

ISFG funding is provided as a grant fund to sub-counties from ministry of finance, to be accessed by specific farmer groups. Farmer groups to participate and benefit from ISFG are selected by the sub-county farmers' forum executive committee and approved by the sub-county farmers' forum.

Despite these policies household incomes have remained low. The challenge facing Uganda is to provide the necessary support services to turn the widely dispersed small-scale agriculture into a catalyst for economic development. Small scale agriculture, which supports the livelihoods of majority of the rural poor, is increasingly under pressure to meet market requirements, which demand product quality, volume and continuity of delivery. Therefore, understanding how market functions and how to engage in the market place is a vital skill, that encompasses an ability to identify, quantify and meet the needs wants and desires of consumers who create the market demand. Consequently, the success of the producers depends on the extent to which they adopt new technologies, access new types of information and gain new commodity skills to enable them evaluate and invest in opportunities as they arise. Successful small holders will be those who can produce quality products and find ways of adding value to the those primary products as well as engage in group marketing

The marketing of agricultural commodities is currently essentially a private initiative where the sector plays a dominant role, right from the farm gate to export level. The biggest percentage of food crop sales is handled by middlemen/agents who buy from farmers at farm gate or in rural market centres and bulk it for the big produce traders and exporters. Inevitably, small-scale farmers in most cases, are price takers in the market and their food – security approach, which focuses on increasing production, can depress the market situation even further. The options small farmers have, to confront this adverse market situation are to:

- Improve the competitiveness of their products in local, regional and international markets.
- Achieve economies of scale through collective action for production and marketing.

- Gain access to business development services that improve access to higher – value and / or more competitive markets,
- Diversify into higher value crops and / or livestock that are linked to growth markets.
- Add value to products by changing farming practices to access higher income markets, enhance product quality and incorporate processing activities.
- Enter new types of business agreements such as contract farming.

Despite the policies that government has designed to ensure marketing system meet its function of delivering products to the right consumers, in the right time , space and form, the role of transmission of price and other information signals between producers and consumers by the marketing system is still weak and underdeveloped . This is due to various barriers (physical, social and institutional) that exist, and cause fragmentation and isolation of producers and consumers. As a result market development especially for agricultural produce is still limited in various locations.

3. 2 Stakeholders mapped and findings

a) Government agencies

Organisation	Persons met	Discussion points	Key learnings/ next steps
Kabale District local government	Sunday Mutabazi (District Production Coordinator)	Discussion centred on local government plans and priorities for agricultural commercialization . The district has developed an agricultural enterprise zoning plan to address commercialization through prioritization based on comparative advantage for increased production and ease access to markets. The plan was been developed in the district by analyzing the agro environment and the enterprises in terms of the current production and marketing practices, available opportunities for further development, gaps and the required support.	The plan was in draft form and yet to be presented to the district council for approval. An electronic copy of the plan was shared. The approved plan to be also shared as reference / guide material
	Akatwijuka Rogers (District NAADS Coordinator), Kasimbazi James AAMP coordinator	Discuss enterprises supported by government, key lessons on them and opportunities for commercialization AAMP and NAADS are the two government programs with largest out reach. AAMP started earlier and NAADS is building on it. NAADS is contracting out advisory services AAMP funding is phasing out	The enterprises promoted vary from sub-county to sub-county depending on the farmer beneficiary selection with technical guidance. AAMP has been supporting traditional crops and livestock. Temperate fruits (mainly grapes and apples) have been introduced mainly through NAADS program Plans are under way to introduce tea and establish a factory.
Kanungu District local government	Turiyo Peter (Production Coordinator)	Discussed major agro-based enterprises being promoted and agricultural zoning plans for the district and obtained information on various programs being implemented in the district by government and NGOs . Major government programs in the district are AAMP and NAADS. The former is involved in: <ul style="list-style-type: none"> ➤ rural infrastructure: feeder/ community roads, markets sheds ➤ Community mobilization ➤ Agricultural comercialisation through support to specific crop enterprises , like rice, potatoes and banana management 	The district has developed enterprise zone plans and is planning to focus investment on Coffee, tea and rice major crops Information on advantages and disadvantages of various enterprises was provided (incorporated in section 4 on analysis of enterprises below)
	Kagirehe Lazarus District Commercial Officer	Discussion revolved on the services offered by the commercial office in the district. <ul style="list-style-type: none"> ➤ It provides information on various potential enterprises ➤ market information on prices of various 	

Organisation	Persons met	Discussion points	Key learnings/ next steps
		<p>commodities being sold in various markets</p> <ul style="list-style-type: none"> ➤ Advising farmer groups on farmer institutional issues, savings mobilisation group formation rules and regulations and group constitutions, cooperatives and SACCOs ➤ Supports groups to develop business plans 	
	Turyomurugyendo Bernard District NNADS Coordinator A	Discussed enterprises selected for NAADS support in various sub-counties, their opportunities, gaps and specific technologies being promoted being	
Kisoro District local Government	Bahizi Zachary (District Agriculture and Marketing Coordinator)	Discussion focused on programs and enterprises supported by the district	AAMP has been operating for a couple of years while NAADS is just being introduced. The department is looking forward of coordinated effort between EEEGL activities and those of other NGOs and government programs and avoiding duplication
	Rwakare Justus (Agriculture Officer)	Interaction was mainly to share ideas on feasible pro-poor enterprises and new initiatives of enterprise development in the district.	Proposed mashroom growing for local and export market
National Agricultural Advisory Services NAADS secretariat	Dr Francis Byekwaso Mr Wakikona John	<p>Discussed NAADS broad strategies for enterprise development. One of the components of NAADS program is enterprise development and promotion. NAADS has developed guidelines to standardize and harmonize participatory planning processes for the selection of enterprises for profitable agricultural production across all districts and sub-counties. A participatory matrix scoring and ranking process is suggested for enterprise selection. The positive attributes used are as follows</p> <ul style="list-style-type: none"> • Profitability of the enterprise is high • Availability of markets (size and requirements of market) • Low financial outlay (initial start-up capital needs and other production costs) • Low risk 	<p>NAADS emphasizes value chain development in enterprise development. It has a number of partnerships with private sector for value chain development. The concept of enterprise mix has been adopted to ensure optimum productivity of production units. Farmers are guided to select a combination of enterprises rather than focusing on a single enterprise.</p> <p>EEEEGL is advised to link up with NAADS program in sub-counties in area of operation to ensure harmony, coordination in enterprise development.</p>
Kachwekano Zonal Agricultural Research and Development Institute	Dr William Wegoire Mr Kakwenzire Rogers (Senior Researchers)	<p>Kachwekano Zonal Research and Development Institute is mandated to provide appropriate technologies for the Kigezi Region. It has three stations of Kalengyere, Kachekano and Bugongi, all based Kabale and are working on agricultural production technologies that include, temperate fruits, Irish potatoes and goats. Research activities have been privatized through a competitive grant for prioritized activities not covered by the core research.</p> <p>The institute works in partnership with local government, farmers through groups like UNSPPA and various NGOs operating in the region. Plans are under way for UBL to contract KZARDI to produce certified seed. An MoU is being developed to this effect.</p> <p>Research results were very encouraging both in terms of fit with agro-ecological conditions and economic analysis.</p> <p>Research is sure that barley can do well if farmers get interested and manage it properly by adopting the basic agronomic practices like having good seed bed, line plating and right spacing and seed rate, fertilizer use, weeding and, line plating.</p> <p>Dr Wegoire shared a document on submission of Barley "Genotypes" Karne and Sabin for variety release. The submitting agencies were UBL, FICA and NARO to the Ministry Agriculture, Animal</p>	By virtue of mandate, the research interest will be interested to collaborate with EEEGL on selected enterprises and provide any available information and technologies.

Organisation	Persons met	Discussion points	Key learnings/ next steps
		Industry and Fisheries August 2006. The document has information on barley industry in Uganda, and presents results of formal studies that lead to recommendation of the two varieties above for release.	

b) Private companies / individuals

Organisation	Persons met	Discussion points	Key learnings/ next steps
Kigezi Pride Bakery	Mr.Sam Kasigazi	Has been operating for 2 years . Imports wheat from America through USAID at \$600 per ton (approximately Ushs 1000/ kg) and Rwanda through individual business men at Ushs 650 per / kg. He has a milling plant with capacity of 30 tons per day and the bakery uses 1500kg per day m	The challenge with locally produced wheat is that the quantities produced are small and difficult to collect. Also from America, he gets red winter wheat which has high protein content. However, the varieties from Kalngyere research station are also of good quality. The company is searching for partners to help link with farmers, train farmers in wheat production. The company is capable of buying all the wheat that can be produced from Kabale , Kisoro and Kanungu
Uganda Breweries Limited (UBL)	Joseph Kalule- Production officer UBL Lawrence Miana Production Manager	Discussed UBL demand for barley and strategies to meet the demand UBL's challenges and prospects UBL obtains Barley mainly from Kapchorwa, and Bukwo in Eastern Uganda . These districts have advantage being the nearest point where the crop can be obtained. However there is a problem of lack of transparency on the side of farmer groups The crop has been introduced in Kabarole, and Bundibujjo, and Kabale and Kanungu Districts on pilot basis. In kabarole it has not done because the altitude is not high enough while in Bundibujjo there is insecurity problem. The yield in Kabale and Kanungu are good but the volumes produced are still small and high production inefficiency	UBL would be interested to work with EEEGL to introduce Barley in her area of operation on a pilot basis. EEEGL project manager recommended that UBL takes time and comes down to the region and organize a meeting to review the performance of the pilot work in the system and identify more opportunities
	Betonde Michael- Local Agent for UBL.	UBL supplies treated /certified seed packed in 50kg bags to farmers at a cost of Ushs.750 / kg The seed is supplied together with DAP fertilizer. Each kg of seed requires ½ kg of fertilizer and one kg fertilizer is shs.1200. For beginners, when given seed on credit they return 2kgs for every kg of seed they received on credit. Fertilizer is given on cash basis. However, where soils are good fertilizer may not be necessary. Maturity period of barley is 3 months and farm gate price is shs 400 per kg. Feed back from UBL is that the size and quality of the produce from Kabale region is very good. Transport of the seed from source to farmers in growing areas increases the seed price while transport from producers to buying centres, and ultimately to the breweries reduces the gate price offered to the farmer The company agent finds challenges in purchasing barley as collecting centre are not sufficient, no stores. Monitoring production is difficult because the production areas are scattered across the district and the agent uses a motorcycle. Late release of funds when farmers are ready to sell is a real challenge as they need money to meet immediate needs like school fees. What is more they do not have adequate storage facilities	There intentions to identify more areas for barley growing in order to increase volumes so that the company gets more profits from increased economies of scale. UBL has about 1.5 tons of seed that could be loaned out to interested farmers in EEEGL project working area
Afro-Alpine Pharma	Mr. Zagyenda Fred	Afro-Alpine Pharma limited (AAPL) is a private limited	The company is exploring

Organisation	Persons met	Discussion points	Key learnings/ next steps
ltd (AAPL)	Business Manager	<p>company incorporated in Uganda with a mission to enable Uganda produce world standard, locally grown, affordable anti malarial treatments to distribute in local, regional and international markets within Africa.</p> <p>AAPL is a Ugandan firm that was formed as a joint venture between local and foreign investors who have launched a \$4.2 project for cultivation of Artemisia Annua and extraction of drug artemisinin from its leaves which is used for production of Artemisinin-based Combination Therapy (ACT). ACT is a first line defense against malaria.</p> <p>AAPL is promoting cultivation of Artemisia Annua in Kabale region using out-growers and nucleus farmers. They have an extraction factory already in production It is extracting Artemisinin from dry leaves.</p> <p>AAPL has signed a 3 year agreement with CIPLA one of the four companies qualified by WHO organization to manufacture ACT.</p> <p>Over 11 nursery sites are in use to produce 14 million seedlings of Artemisia for cultivation on 2000 acres using an out-grower scheme. Six hundred out growers have been contracted to produce 1500 tons of dried leaves to give enough raw material for production of 20 million anti malarial treatments</p>	<p>opportunities in other botanical materials and is therefore relevant for EEEGL on its NRM focus for enterprise selection. However, the exploration may take longer than EEEGL project span.</p>
Agro- input suppliers (Kabale Town)	(various)	<p>There are around 13 agro-input suppliers. The services they provide include</p> <ul style="list-style-type: none"> • Selling of agro-chemicals • Trading in seed, fertilizers and pesticides • Provision of advisory services on use of chemicals and other inputs (this is not paid for but the charge is embedded in business as it is a promotional measure for more sales 	<p>It was noted that majority of the people dealing with agro-inputs are not technical. Most of the agro-chemicals sold are mainly for potatoes and vegetables.</p>
Kabana Produce dealers limited	Byamukama Bernard	<p>Deals with whole sale store produce mainly rice, g.nuts and maize flour. Most of the produce is bought from outside Kabale district especially Mbarara, Ibanda and Ntungamo. The maize flour is from as far as east Uganda. Business men and women from Rwanda buy from him. Prices for produce are usually low at the period of harvest and increase reasonably around planting. However, he does not keep stock to wait for price increase. He aims at making profits by selling big volumes in a short time.</p>	
Kabale transporters company	Byamukama Kahororo M G,	<p>Discussions were held on how the transport business works with a focus on lorries. Lorry drives transport products requested by traders and owners of stores. Lorry drives usually have contacts with wholesalers and regional traders operating in Kabale, Kisoro and other districts. They act as agents / middlemen of retailers in the market. They get a list of goods to be brought and driver will get the same from outlets requested.</p>	<p>Some of the store owners especially those dealing with produce have their own trucks. It was noted that market of produce is very dynamic. There is a lot of trade in produce between Rwanda and Uganda. At times produce is sold to Rwanda and when there is scarcity it brought back to Uganda. (this mainly for beans and maize flour.</p>

c) NGOs

Organisation	Persons met	Discussion points	Key learning/ next steps
IGCP	Mark Mwine (Enterprise Development Advisor)	<p>Discussion centred on the enterprises promoted by IGCP. These include honey, Mushrooms, handcrafts, artemisia</p>	<p>Mushroom enterprise was abandoned because there were few farmers involved and the source of seed was far. Artemisia is being promoted as a buffer crop but the marketing is not yet assured</p>
CARE (PEBO)	Patricia Nsiime (Enterprise Development Advisor) & Mugisha	<p>Discussed KBDS enterprise activities and partnerships. KBDS is promoting passion fruits, honey and handcrafts. The partners for these enterprises are African 2000network, KIBECO</p>	<p>During the inception of KBDS, sub-sector studies on honey, passion fruits and handcrafts. Reports on these studies are available.</p>

Organisation	Persons met	Discussion points	Key learning/ next steps
	Doris (M&E Officer)	<p>and Drucilla Balaba respectively. Honey is being promoted in Kisoro, Handcrafts in Kabale and passion fruits in Kabale and Kanungu.</p> <p>Drucilla Balaba vocational Training school is a church based mother's union project. Her mission is to train women in practical skills, knowledge and attitudes for self reliance. The project offers different trainings services in the following areas: Knitting, tailoring and design, crocheting and crafts, handcrafts, cookery and home management</p> <p>Under partnership with CARE KBDS, Drucilla links handcraft producers and consumers in terms of providing market feedback, for the producers and other relevant market information, such as on price, quality, quantity markets among others. They are encouraging women to regard hand craft making as a viable business venture, that can help them improve on their household incomes other than take it as a leisure activity that is hardly carried out for profit making.. The partnership is organizing handcraft makers into a critical mass so as for them to benefit from economies of scale in both production and marketing of their products. The partnership is also promoting formation and strengthening of Village Savings and loans Associations.</p>	
African Highlands Initiative (AHI)	Kamugisha Rick (Site Coordinator)	<p>AHI is an ecoregional research program of ASARECA that focuses on improving livelihoods and reversing natural resource degradation in intensively cultivated highlands of East and Central Africa. It promotes an "integrated natural resource management approach (INRM) where coordination of collaborative and participatory research and development efforts are integrated to improve agricultural production and natural resource management in highland watersheds address the human and institutional factors affecting management, and aim to help construct more conducive development strategies and policies. Target beneficiaries and participants include national and international research organizations, and networks, civil society, organizations, service providers, policy makers local authorities community organizations and farmers.</p> <p>Discussion focused on AHI work on agricultural marketing.</p> <p>AHI has supported formation of marketing committees at parish level. The marketing committees at parish level are comprised of 8 to 9 persons. These committees are in charge of negotiating prices and are facilitated to collect marketing information. This information is put together and aired on local FM radio with using project funds</p> <p>The information channels used for dissemination of market information include:</p> <ul style="list-style-type: none"> ➤ Village information centres. These are equipped with a library, and village phones for linking farmers to markets. ➤ FM radio mainly Voice of Kigezi. The challenge facing this channel is that air time is very expensive hence information is usually provided in short slots <p>KAZARDI also has an FM radio station but its coverage is very limited .</p>	<p>AHI-piloted model of village based marketing committees and information centres to be further explored for feasibility under EEEGL context</p> <p>AHI has started implementing a program called Sub-Saharan challenge program in parts of DRC, Rwanda and Uganda. The program is focusing on</p> <ul style="list-style-type: none"> ➤ natural resource management (nrm) ➤ market linkages ➤ improving productivity. <p><i>There is high chances of overlap in terms of interventions and geographic focus hence a need for liaison with the program to identify synergies and areas of collaboration</i></p> <p>Mr. Chris Opondo is to be contacted for more detail through 0772978237 or c.opondo@cgiar.org</p>

Organisation	Persons met	Discussion points	Key learning/ next steps
		AHI is writing a concept note for soliciting support to KAZARDI to upgrade /boot it.	
CIAT / Africare	Muzira Robert Research Assistant on former soil fertility management project	<p>CIAT worked in partnership with Africare to implement a project titled “Enabling Rural Innovations project”. Under this project, farmers were trained in improved potato management and natural resource management using the Farmer Field Approach. After a couple of years of training when production of potatoes increased, farmers through Nyabyumba United Farmers Association (which evolved over time of engagement with the two organizations were facilitated to do market analysis.</p> <p>After market analysis, farmers selected NANDOS (Kampala based hotel). The hotel gave specific conditions regarding the quality and quantity of potatoes to be supplied by farmers. NANDOS wanted grade A (potatoes not less than 8cm diameter). They wanted the farmer’s association to supply 48 bags each of 100kgs after every 2 weeks. The Association could not meet this demand so they operated other “Farmer run Farmer Field Schools”. In this way the Association increased its membership to 120 farmers. The farmers started used staggered planting to ensure continuous / regular supply. In the wet they plant on hilltops and mid slopes and during dry seasons they plant in valleys where they practice small scale irrigation and in reclaimed wet lands.</p> <p>NARO was involved in research and training of farmers on proper spacing and fertilizer application rate for farmers to meet size specification by NANDOS. Spacing had to be adjusted from 30x70 to 30 x75 cm.</p> <ul style="list-style-type: none"> ➤ The challenges experienced include the following: ➤ Payment terms : NANDOS pays by cheque two weeks after delivery. However, farmers would want cash to solve immediate household problems ➤ Traders from Rwanda mind less about quality and therefore take mixed grades. ➤ Initially NANDOS had no good storage facility and weigh at time of preparing cheeps. Thus moisture losses, and rotting were shifted to the selling farmer. <p><i>These anomalies have been corrected as weighing is done instantly Every year there is renegotiation</i></p> <ul style="list-style-type: none"> ➤ With the increased demand, crop rotation cycle was altered with potatoes being grown more frequently. As a consequence prevalence of pests and diseases particularly bacterial wilt has increased. Where irrigation is practiced, it causes more spread of the pathogens. ➤ Some farmers especially the very poor ones fall out because they could not meet conditions of NANDOS and are selling through other market outlets. Currently a small group called Potato growers Association has registered their business with Kabale district. They buy from other farmers and sell to NANDOS and are building a village bank. 	<p>Robert suggested it would be a good idea to follow this approach of developing active market linkage by having the producers participate in market assessment.</p> <p>One key lesson from this experience is the need to empower producers to “own” their products and negotiate prices rather than being price takers.</p>
Kigezi Private Sector	Muhwezi James	This is a UNDP supported initiative to promote	The centre is interested in partnering with

Organisation	Persons met	Discussion points	Key learning/ next steps
Promotion centre limited	(micro-finance Officer)	<p>private sector service providers in the region. The centre is trying to promote commercial orientation in service market for orienting communities on “the pay for services” concept</p> <p>The mission of the organization is to “provide quality and reliable products, services and necessary skills to stimulate entrepreneurship development through promotion of micro, small and medium enterprises and microfinance institutions on a sustainable basis. The products of the organization include</p> <ul style="list-style-type: none"> ➤ Business management and entrepreneurship training ➤ Micro finance services ➤ Agro-based/ farm business management and technology development and training ➤ Information technology services including faxing, e-mailing / internet surfing 	EEEEGL particularly on promotion of savings and loans associations.
Africa 2000 network-Uganda (A2N-Uganda)	Mr Musime Jimmy Ag. Coordinator	<p>A2N Uganda has been operational in Uganda since 1990. Her vision is “ <i>improved and sustainable livelihoods for smallholder farmer</i>”.</p> <p>Has a mission to alleviate poverty by supporting smallholder farmer groups to undertake initiatives geared towards livelihood improvement and natural resources regeneration and conservation. The objectives of the organization are to</p> <ul style="list-style-type: none"> ➤ Promote the use of sustainable agricultural technologies and practices in harnessing the natural resource ➤ Building capacities of smallholder farmers for ecologically sustainable development ➤ Encourage active participation of men women and youth of all capabilities in development activities. ➤ Empower local communities for leadership and good governance ➤ Build local institutions for collective action in the area of marketing , resource mobilization and advocacy ➤ Strengthen farmers’ entrepreneurial skills for sustainable income generation 	<p>Has partnership with CARE through KBDS project on passion fruit production and marketing and VSLA. It is one of the NGOs with extensive outreach in Uganda in South west Uganda it works in Kabale and Kisoro and has extended to Kanungu under partnership with CARE.</p> <p>Has systems and staff in place and is interested to work with EEEGL on market linkage issues and VSLA.</p>
FAO- trans-boundary food security project	Habtom Asmelash (Regional Coordinator) & Federica Nshemererwe (National Coordinator-Uganda)	<p>The project is beginning to be implemented in Uganda Rwanda and Burundi. The overall development objective of the project is to improve food security and small farmers’ livelihood through commercialization and diversification of farm enterprises. This is to be achieved mainly through identification and promotion of competitive and profitable value chains that will promote market led production.</p>	<p>The project has done enterprise assessment for honey, potatoes, vegetables, fish farming, and dairy. The assessment ended with round table discussions with district based partners. For Kabale district, the enterprises selected are honey and potatoes while for Kisoro, dairy and potatoes were selected.</p> <p>The project team expressed keen interest in collaborating with EEEGL. They promised to share work plans and technical documents.</p>

d) Microfinance institutions

Organisation	Persons met	Discussion points	Key learnings/ next steps
PRIDE Microfinance limited (MDI) – (Kabale branch)	Mufumba Henry	<p>How they operate and the services offered. Offer savings and loan services</p> <ul style="list-style-type: none"> ➤ Opening up a savings account requires a minimum deposit of Ushs 10,000, introduction letter from LC / employer, an identification, and savings card fee of Ushs 3000 ➤ The institution gives three types of loans that is individual loan, group guaranteed loans and salary loans. ➤ The requirements for an individual loan, one should have a business running for at least one year, a savings account with pride, resident within 25 km from the branch, adequate security e.g land, motor vehicle or chattels such as household or business assets and repayment period is 3-12 months ➤ To get a group guaranteed loan, one must be having a running business, have four other business persons in need of a loan, no need for traditional security; attend one hour meeting at the branch, loan size starting from shs. 150,000 to 6,000,000. For a salary loan one must be a full time employee of a reputable institution that has been profiled by PRIDE loan size up to 10,000,000. ➤ Interest rate is 25% p.a for all categories of loans. 	<p>The branch has clients from all over Kabale, and few from Kisoro. PRIDE works under control of Bank of Uganda.</p> <p>Because of business reasons they may not expand / open up branches in Kisoro and Kanungu. The costs of running a branch make it not viable when the level of activity in the area is low and infrastructure is poor.</p>
Promotion of Micro-enterprises for efficient Poverty reduction (PROMIC)- Uganda	Ekinkuhere Frances Promic Coordinator	<p>PROMIC is a church based program initiated by Catholics Women's Bureau in partnership with Foundation of Open- Hand, Swissland Switzerland to enable less privileged women access credit for economic development.</p> <p>It encourages all participating women to regularly save money so as to improve and expand their economic activities. The program has activities in kabala and Kisoro and is planning to extend services to Kanungu</p> <p>The objective of the program is poverty reduction by enabling hundreds of individual poor women to carry out micro-enterprises by provision of credit (loans), pre- investment consultation and entrepreneurial training to inculcate self confidence in them, improve their incomes, promote a culture of savings and thereby attain a better quality of life.</p> <p>Program activities include:</p> <ul style="list-style-type: none"> ➤ Forming / strengthening solidarity groups, skills development in leadership ➤ Encouraging women to participate in development programs ➤ Training in entrepreneurial skills ➤ Providing credit ➤ Promoting savings culture <p>The average loan amount should not be higher than UGX 400,000 in the first year of the program, the maximum is 700,000 for manufacturing activities. The interest rate is 2% per month on a flat rate.</p>	<p>The implementing team picked interest in the VSLA model developed and CARE could partner with PROMIC to scale-up it up</p>
Lyamujungu Cooperative Financial Services limited	Buhazi Stanley Business Manager	<p>It is a saving & credit cooperative organization. It started in 1984 as a group of 16 and registered as a SACCO.</p> <p>The main business is savings and credit for its members.</p> <p>With regard to savings, it offers different products including site saving, fixed savings and target savings</p> <p>They offer varying types of loans;</p> <ul style="list-style-type: none"> ➤ Business / commercial loans ➤ Agricultural loans ➤ Social security loans ➤ Inventory credit loans ➤ Education/ school fees loans 	<p>Inventory Credit (IC) model has been tried in partnership with KADFA and CARE through ISAMI project</p> <p>It was applied on beans. Farmers are demanding IC on sorghum and peas. Others are demanding it on potatoes. However, the challenge is that potatoes are generally difficult to store for a long period</p> <p>Challenge faced by cooperative in delivery of services is long distance for</p>

Organisation	Persons met	Discussion points	Key learnings/ next steps
Uganda Cooperative Alliance ltd.	Kalibala Appolo Kagwa (Coordinator PACE project)	<p>The major objective for its establishment is to enhance productivity of rural community groups. Promoting Area Cooperatives(PACE)project offers the following services:</p> <ul style="list-style-type: none"> ➤ Farmer advisory services, ➤ Marketing services- collective marketing ➤ Training on savings and credit ➤ Enterprise development (potatoes, rice, garlic, bee keeping, paprika) 	UCA, has a partnership with UBL on evaluation of barley enterprise. staff travel.

e) Farmer groups and Associations

Organisation	Persons met	Discussion points	Key learning / next steps
Uganda National Seed Potato Producers Association (UNSPA)	Tindimubona Stephen (chairperson and Mrs Keren Kisizi member)	<p>Uganda National Seed Potato Producers Association (UNSPPA) is a non-profit making organization formed in 1995 with the purpose of promoting the quality and quantity of improved seed potatoes in Uganda. It was registered under the company's Act as a company limited by guarantee not having share capital on 30th October 1997.</p> <p>The Association is open for all farmers' organizations and individuals engaged in seed potato production irrespective of sex. Having started with a membership of 5 hailing from Kabale and Kisoro districts, it was able to expand to 42 members (27 men and 15 women) in 2002 after covering 3 more districts of Mbale, Kapchorwa and Nebbi in the Eastern and North Western Uganda respectively. With the guidance of UNSPPA, members from Eastern and North Western Uganda were able to form their own Associations by 2005 in order to bring services nearer to the people. Consequently, the current membership for Kabale district stands at 18 (13 men and 7 women).</p> <p><i>Broad objective.</i> The main objective of the Association is to improve production and distribution of improved seed potatoes in Uganda.</p> <p><i>Specific objectives.</i></p> <ol style="list-style-type: none"> 1. To unite all individual farmers engaged in seed potato production into one common front that will promote, encourage and safeguard their activities and interests within the country. 2. To improve on the production magnitude and distribution of high quality seed potato, through adoption of improved production technologies, promotion of proper storage facilities, packaging and delivery. 3. To promote farmer-researcher linkage in order to facilitate technology transfer and adoption process from the former to the later and vice versa so as to enhance food security, nutrition and poverty alleviation. 4. To procure genuine agro-inputs for the members as a unit and take advantage of economies of scale. 5. To create a force for soliciting funds and other contributions from the donor community. 6. To publish and distribute books, magazines, periodicals, journals, newsletters and other relevant work that is connected incidental to the potato industry in the country. 	<p>UNSPA is interested in partnering with EEEGL as means to recruit more members and getting market for seed potato in EEEGL project working area</p> <p>Uganda National Seed Potato Producers Association has had close collaboration with Uganda Government and other local organizations with similar objectives such as A2N, NARO, AFRICARE, AHI, AFRENA, and CARE. It also enjoys support from international organizations like CIP, PRAPACE and ASARECA in its endeavours to accomplish its objectives.</p> <p>It has close links with KAZARDI and enjoys technical and material support from as a source of foundation / basic seed.</p>
Uganda Agro-input dealers Association (UNADA)	Mr. Bitarabeho Fred & Mr. Tindimubona Steven (members)	<p>UNADA is a national apex organization for all agro-input dealers in Uganda. It was registered under the NGO statute in 2003. <i>The vision of the association is :</i> <i>" A Uganda where agricultural inputs are available on a sustainable commercial basis in the quantity, quality, time and place desired by farmers.</i> <i>The mission of the association is</i> <i>To strengthen the capacity of its members to serve their</i></p>	<p>UNADA is interested in, and has formed strategic partnerships to advance the interests of its members in various areas. These include</p> <ul style="list-style-type: none"> ➤ Private sector foundation, ➤ The Agricultural

Organisation	Persons met	Discussion points	Key learning / next steps
		<p><i>customers and offer fairly priced, high quality agricultural inputs on a sustainable commercial basis in the in the quantity, quality, time and place desired by farmers.</i></p> <p><i>The aims and objectives include</i></p> <ol style="list-style-type: none"> to represent all agro-input dealers in the country and act as a negotiating body that speaks with one voice to support the interests of all members To provide professional support and networking among agro input dealers, encourage and support the business development of individual members, and promote the exchange of ideas and skills in order to improve services to the farmers. To establish and enforce a code of fair business conduct for members and keep membership informed of legal codes regulating the industry. To actively contribute to the modernization of Uganda's agriculture, and participate in projects aimed at brining development to the agricultural sector <p>Membership is open to men and women who show commitment to the Associations aims and objectives and are willing to abide by the constitution, code of conduct, rules and regulations of the association. There are different categories of membership including full members(Active agro input dealers); Associate members(open to members who have not yet completed training or have not yet started their business; and working partners(this category is open to interested institutions, companies, organizations or businesses involved in related enterprises.</p> <p>Member services are developed to repond to the changing needs of the sector. The services currently offered include skills development, market development, advocacy and policy analysis, market linkages and credit linkages</p> <p>UNADA has instituted a regional structure to enable agro-input dealers from all parts of the country to participate in the association and work together at the regional level on issues of specific interest to the members from that part of the country . Kigezi is one of the recognized regions and includes Kabale, Kanungu, Kisoro Ntugamo and Rukungiri.</p>	<ul style="list-style-type: none"> ➤ Council of Uganda ➤ Uganda Seed trader's Association, ➤ USAID ➤ Rockefeller Foundation, Agricultural Productivity Enhancement (APEP) ➤ Crop Life Uganda <p>EEEEGL can partners with UNADA in developing community based input distribution systems if the selected enterprises warrant it.</p>
Kabale District Farmers' Association (KADFA)	Agambe Giles Business Manager	<p>A decentralised unit under the umbrella of Uganda national Farmers Federation (formally Uganda National Farmers' Association). Has been supported by DANIDA for a long time which slowly cutting down. It is a membership organization offering the following services to its member:</p> <ul style="list-style-type: none"> ➤ Advisory services to farmers on crop agronomy ➤ Market information and linkages ➤ Provision of knowledge and input supplies ➤ Group management and knowledge on collective marketing orientation 	<p>Has partnered with CARE through ISAMI project to promote two business promotion models of inventory credit and warehouse receipt system for beans. KDFFA intends to continue supporting development of the inventory credit system on beans and if extra support is obtained, they apply it to other enterprise. The Association is exploring opportunities for market led agribusiness development in order to develop a fundable proposal for DANIDA funding – Barley has been earmarked as a potential as UBL is providing market for it for farmers in Rubaya and Kacherere through an a local agent.</p> <p><i>As a way forward it was agreed that KDFFA Business Manager looks for more information and develop a concept note. Project Manager EEEGL promised to review and give input on the concept to be submitted to DANIDA</i></p>
Kisoro Bee Keepers Cooperative Society KIBECO (<i>formally</i>)	Tumusime Stephen Centre manager.	Initially supported by an Austrian project, now running through its own revenue and support from CARE through Kigezi Business Development Services Project (KBDS). The society	'The levels of production are still very low. KIBECO is supposed to supply 1,000 jars of 500g of honey

Organisation	Persons met	Discussion points	Key learning / next steps
<i>called Kisoro bee keepers Association)</i>		<p>has a strong membership base of 460 apiary farmers.</p> <p>It is a membership organization offering the following services</p> <ul style="list-style-type: none"> ➤ Facilitating market linkages to its members through its contacts and outlet in Kisoro ➤ Technical know how and quality training and orientation ➤ Advisory support (but less due to funds constraints) <p>More than 80% of honey is sold to shoprite in Kampala. There is competition with the Rwanda and other local market outlets.</p>	<p>per week but are supplying a maximum of 500 jars of 500g per moth to shoprite supermarket.</p> <p>Training of Bee keepers on best practices of bee keeping for increased production is needed.</p> <p>The Center manager was advised to contact the Uganda National Apiculture Development Organisation (TUNADO) for technical support.</p>

4.0 Findings on enterprise development and market related factors:

4.1 Transport and communication

Road and transport

Roads are essential in transporting farmers produce to markets. Transport in the region is greatly hindered by the hilly terrain. The rugged terrain is a major obstacle to the expansion of roads. Some places are hardly accessible by road while most of the available feeder roads become impassable during rainy seasons.

Feeder and community road network link rural farmers to markets. Some attempts to improve the network over the last years has been through interventions of programs like LGDP, AAMP, PMA and NGOs like AFRICARE. These interventions are focused on opening and rehabilitating the feeder roads. These roads will however need to be maintained to have then motor able throughout the year

A number of community roads have been opened and some remote areas which were earlier not accessible by road network are now motorable and vehicles can be seen loading produce. However maintenance of these roads is a big constraint to the district.

Kisoro has an airstrip which facilitates air transport. The 1496m x 30 m runway is grass and in good condition Kabale District is linked to Mbarara and Rwanda by tarmac, the road from Kisoro to Kabale is being under construction (tarmac) while Kanungu is linked to Kabale and Rukungiri by rough murrum roads.

During the mapping exercise,

Electronic Media

The following electronic media services exist in the three districts of EEEGL operation:

- 3 FM Radio stations, Voice Of Kigezi, (VOK) and Kacwekano Multi Media Centre, and Kinkizi FM limited
- 4 Telephone servers, MTN, Celtel, UTL and Warid
- 3 Telecentre hubs, Rubaya, Kacwekano and Kabale KDA Yard
- Several internet houses.
- Radio West based in Mbarara and Uganda Broadcasting Cooperation Radio also cover the area while

The presence of FM radio stations, four telephone providers and 3 tele centre hubs offer opportunities for sourcing and dissemination of information. These services are important channels of agricultural information, communication, and dissemination.

Industry

Industrial activities are very limited in the area, what exists is small scale processing in following commodities; grain milling; bakeries; milk cooling and storage; cheese and yogurt; wine making; honey processing. Others are timber sawing, woodwork and carpentry, building and construction, tourism, hotel and transport services. In Kanungu there are two tea factories operated by private individuals. They process and park tea that is mainly for export market. In Kisoro, Biruga Dairy Industries has a milk processing plant. The plant processes milk and exports pasteurised milk and UHT milk to Rwanda and Burundi. The plant has capacity to handle 14000litres per day. Most of the milk is obtained from Ntungamo and only 400 litres is obtained from Kisoro Dairy farmers on a daily basis. A list of processing facilities available in Kabale is given as annex of the report

Energy supply

About 98.% and 2.% of the house hold use fire wood for cooking and lighting respectively. 97% of the households use paraffin for lighting. Only 4.2% and 0.2% of the households use electricity for lighting and cooking respectively.

This dependence of fuel wood has negative implications on natural resource management.

4.2 AGRICULTURAL PRODUCTION AND MARKETING

Agricultural Production

Agricultural production in the area is the main activity for most of the people, for provision of family food, employment, and income. Agricultural production is comprised of crops, livestock, fish farming and apiary. Crop farming system is on smallholder-fragmented plots of land, while livestock is mainly on free range. Livestock fenced farms are limited to grade animals mainly along valley bottoms. The land holding has been declining with the increasing population and land for agricultural production is limited.

Crops

The production figures show that yields under farmer practices are low but with capacity to increase with use of the available improved production packages, Appendix 1.

The improved production packages include use of

- (a) manure to restore soil fertility,
- (b) high yielding and clean seed,
- (c) pest and disease control measures,
- (d) timely planting, weeding and harvesting.
- (e) Appropriate post harvest handling

Many crop enterprises are grown in the region with varying acreages as shown in annex..... of the report. There are also relatively new crops now being taken up by farmers. These include temperate fruit trees,(apples grapes, pears, peaches) grafted Avocados, passion fruits, Grapes, Mushrooms and flowers, Tea, Artemisia, barley and mulberry for sericulture.

Livestock

The livestock sector is dominated by small numbers of stocks per household, that include, cattle (indigenous and improved), goats, sheep and pigs that often graze on free range. The livestock numbers in the three district of kabala, Kanungu, and Kisoro are shown in Table 2 below.

In most parts of the district, there are very good pastures and favorable climatic conditions for production of good exotic dairy cattle breeds. Kabale is a main source of dairy cattle breeding stocks for many other districts in Uganda. This has sustained dairy farmers in face of the low price of milk. An average of 10,000 lts of milk is collected by the 3 cooling centers a day while the rest of the milk is sold to consumers in town and

rural areas by vendors. All the milk is sold to consumers as raw. The livestock enterprises have potential of increasing productivity under improved management (Appendix 2).

Table 2: Type of livestock and their numbers

TYPE OF LIVESTOCK	NUMBERS		
	Kabale	Kisoro	Kanungu
Cattle	68,022	29,000	30,000
Goats	170,000	40,000	21,260
Sheep	80,000	27,000	3,147
Pigs	12,000	3,000	4,000
Zero grazing units	1,778 units	NA	NA
Donkeys	5	30	NA
Chicken	600,000	5,300	63,000

Source: Uganda Districts information handbook- expanded edition 2007-2008

Other Farm Based and Agricultural Related Activities

There are other farm-based activities that help farmers and communities raise income to supplement earnings from agricultural production. It is estimated that there are 16,506 micro enterprises and 686 small enterprises in Kabale district alone. In the same district, the total number of enterprises is 17,192 employing 28,441 people). The micro enterprises employ 1 – 4 persons while the small enterprise employs 5 - 9 persons (UBOS 2006).

The micro and small enterprises have potential of employing many people, which is an opportunity to provide alternative sources of income and increase investment in the agricultural production. There is however, need for skills development.

Markets and supermarkets :

Markets

Farmers market their produce through a long market chain involving many players and middlemen that make the farm gate price and consumer price significantly different. Some of the products like Irish potatoes, vegetables, dairy and sorghum end up outside the region and across international borders to Rwanda and the Democratic Republic of Congo.

The local buying centres are scattered at convenient locations within the district namely:

- (a) Rural markets
- (b) Trading centres
- (c) Main town markets
- (d) Cooperatives/stores
- (e) Village shops
- (f) On-the-farm buying points

The present marketing outlets include: (a) Daily/weekly rural markets, (b) Middle vendors (c) Agro processors (d) Associations/societies (e) Institutions like schools, hotels, etc

During the enterprise mapping exercise, the following selected markets were visited. Rubuguri market (rural market in Kisoro), Kayonza market (rural market in Kanungu) Karukara and Kagunga (rural markets in Kabale).Kabale Central market . Major observations on these markets are presented in the table below

Market and location	When it operates	Items sold	Comments
Rubuguri Kayonza	Operates every Friday Operates every Thursday	<ul style="list-style-type: none"> ➤ Clothes, old and new from main towns Kabale, Kisoro and Kanungu ➤ Food stuffs (potatoes, sweet potatoes, beans avocados, green vegetables peas, millet meat) ➤ General retail merchandise including exercise s books, soap, salt, paraffin ➤ Handcrafts especially baskets ➤ Clay products (charcoal stoves and pots) 	Most of the food items are bought in small quantities by local people and for substance farming communities, this is reflective of food insecurity.
Karukara Kagunga	Every Tuesday Every Thursday but some items are there daily	<ul style="list-style-type: none"> ➤ As above but also have tobacco and timber products (doors and windows. 	Most of the food stuffs are bought by people from Kabale town Tobacco is bought by traders who mainly take it to Rwanda
Kisoro market	Operates twice a week- Mondays and Thursdays	The market has a variety of materials including clothes, shoes, furniture, household consumable like salt which is sold by women, ropes baskets/ trays made from bamboos and stoves made from clay foodstuffs sold include maize, millet ground nuts and potatoes	

Supermarkets

The number of super markets is on the increase in Uganda. The growth of supermarkets is assumed to present an opportunity for small-scale farmers to participate in this new agri-food marketing system. It is presumed that participation of local producers, who are mostly small holder farmers, could trigger value addition to evolve for many agricultural products. Supermarkets can also link local farmers to export markets.

In Kabale town , there are three main super markets namely Jamaly, royal supermarket, and Kabale shopping centre. Most of the products sold in these supermarkets are from Kampala. It was interesting to note that whereas the region is a major potato producer, the potato crisps in the super markets were from Kampala. There is one individual (Tindimubona S) who has started producing crisps and is selling to secondary schools around Kabale. The common products are honey and diary products namely pasteurized milk, UHT milk, cheese, butter and yoghurt.. Some cheese and yoghurt are made from kabale. Honey is mainly from Kisoro and Bushenyi. Some types of honey marketed include natural honey, and pure honey from Kampala as well as Pearl's pure honey from RECO industries in Kasese. Kisoro and Kanungu towns have one super markets each. These also have crisps from Kampala

4.3 Agro Business Facilities.

Commercial services

- (a) Registered SACCOs only a small proportion are very active
- (b) Registered production and marketing cooperatives
- (c) Microfinance institutions excluding SACCOS
- (d) Traditional/commercial banks
- (e) Group savings and loans associations

All sub counties have already selected and nominated at least one SACCO to be supported under Prosperity for All.

4.4 Linking farmers to Markets and other services

There various efforts to link farmers to market outlets. What has so far been achieved, is that one group of potato farmers is linked to *NANDOS* Fast Food outlet in Kampala for the supply of potatoes and cabbages. Secondary, a warehouse Receipt System arrangement is being tried out with climbing beans. CARE ISAMI is supporting this initiative and 4 stores have already been built. There is also potential for contract production for Artemisia, wheat, barley and tea. Other active linkage being tried on honey by KIBECO to Shoperite in Kampala

4.5 Farmers institutions

The development processes today recognizes the need to empower farmers through strengthening their organizations. Farmers are now being advised to organize themselves in their interest groups to be able to access services.

4.6 Advisory services

There are many institutions and agencies providing agricultural advisory services to the farmers in the region. They include the following;

(a) Government

Government is responsible for providing advisory/agricultural extension service and technical information to farmers, to help them improve the agricultural production. This is done by government extension workers and contracted service providers under NAADS Program.

(b) NGOs

There are a number of NGOs and CBOs implementing development programme in the district in different sub counties. The services of these NGOs and CBOS compliment the districts local government effort in fulfilling her mandate of providing services to the communities. The NGOs include; AFRICA 2000 NETWORK, CARE, KADFA, AHI, WORLD VISION Kigezi Private Sector Promotion Centre Ltd., COU, Heifer Project, Kabale Diocese Social Services and Development , Integrated Rural Development Program (IRDP), Nature Uganda .

c) Private sector

The Private Sector is involved in retail and wholesale produce business, as well as stocking and selling Veterinary drugs and Agro Chemicals.

D) Research services

Kachwekano Zonal Research and Development Institute is mandated to provide appropriate technologies for the Kigezi Region. All its three stations of Kalengyere, Kachekano and Bugongi are based in Kabale and are working on agricultural production technologies that include, temperate fruits, Irish potatoes and goats. Research activities have also been privatized through a competitive grant for prioritized activities not covered by the core research.

4: ANALYSIS OF MAJOR ENTERPRISES IN TERMS OF AVAILABLE OPPORTUNITIES, GAPS, POSSIBLE AREAS FOR INTERVENTION AND THE REQUIRED INFRASTRUCTURE IN INCREASING PRODUCTIVITY AND COMMERCIALIZATION

(a) Crop Enterprises

Enterprises	Available opportunities	Gaps in increasing productivity and commercialisation	Areas for intervention	Required infrastructure
Irish potatoes	Suitable climate and soils, Availability of good seed source, Availability production technologies Ready market in and outside the district High adoption rate Availability of research information	Diseases mainly wilt, Market price fluctuations, Bulky and expensive to transport, Perishable nature of the product Expensive seed and inputs	Value addition and agro processing, Increase of clean seed at farmer level. Improve management to increase quantities. Linkage to markets/ contract production.	Agro processing Bulking centers and stores Contract production Production of basic seed
Beans (climbing)	Tolerant to diseases especially bean root rot. Higher yields than bush bean, Integrates natural resource management, with regard to trees for stakes.	Inadequate seed, Inadequate stakes, Yields sensitive to moisture fluctuations, requires adequate rain, Pests mainly birds and rats.	Seed multiplication Bulking seed Promote tree planting for stake production Research into alternative staking technologies	High yielding varieties-seed. Bulking stores. Stake production
Bananas	Several uses (Beverage, eating, fruit, chips), Local market/ staple food, Perennial system and does not degrade the environment.	Limited sources of elite planting materials, Limited land for expansion, Bulky to transport with no value addition, Perishable nature. Pests and diseases (BBW)	Multiplication of clean planting materials Increase productivity by use of manure Value addition and agro processing	High yielding and disease tolerant varieties Management skills Agro processing
Apples	Good climatic and soil conditions, Market opportunity, Research being conducted in the District, Perennial and conserves soils	Inadequate grafted ready to plant seedlings, Inadequate management knowledge and skills	Support and promote seedling production, Skill enhancement on nursery and orchard management.	Nursery establishment Management skills Agro processing
Passion fruits	Ready market in and outside the District, Perennial system.	Pests and diseases, Knowledge about management, Varieties mixed, clean planting material Limited management skills	Provision of clean seedlings, Management skill training, Value addition and agro processing Research for resistant varieties	Appropriate varieties Nursery establishment Management skills Agro processing
Pineapples	Suitable soils and climate. Semi perennial Local market	Varieties are mixed. Inadequate planting materials Perishable Limited acreage Limited management skills	Value addition and agro processing, Farmers forming marketing associations, Enhancement of production skills.	Elite planting materials Management skills Agro processing
Horticultural Crops	Good soils and climate, Easy to grow, high production per unit area They promote nutrition and good health.	Poor markets and market information, Short shelf life/Perishable.	Market information and linkages Value addition technologies Exploring exports opportunities	Cold chain storage Agro processing Management skills

Enterprises	Available opportunities	Gaps in increasing productivity and commercialisation	Areas for intervention	Required infrastructure
Wheat	Suitable soils and climate, Resident knowledge and skills. Presence of wheat mills and bakeries in the district	Suitable seed varieties, Negative attitude based on post non payment of collected produce by cooperatives Nutrient mining	Suitable seed multiplication/ foundation seed, Popularizing and establishing market linkages. Contract production Use of fertilizers	Clean/ foundation seed Contract production Marketing/bulking centres
Barley	Suitable soils and climate, High market demand from breweries companies, Limited palatability to grazing and wild animals, Availability of suitable varieties High demand from Brewing companies	Limited skills in management, Lack of local supply of seed Weak linkages between farmers and brewing companies Limited awareness about the crop Nutrient mining	Establishment of a local seed system, Popularizing and strengthening market linkage (contract production)	Clean / foundation seed , Contract production , Marketing/ bulking centres
Mushrooms	Utilizes limited space, Production is not Labour intensive, Uses locally available materials like sorghum husks, delicacy.	Seed production inadequacies, Short shelf life, Limited access to markets, Limited Information about utilization Limited management skills	Support seed production techniques, Market information and access, Agro processing and value addition, Popularizes eating of mushrooms by the local communities.	Seed/spawn making Contract production Agro processing
Spices	Potential ready market outside the district, Uses small plots of land.	Limited information on production packages, Lack of market information.	Access to production information, Market information and linkages, contract production Packaging and value addition.	Contract production Access to seeds Agro processing
Tree plantations	A lot of demand for poles, wood fuel, timber, charcoal, fodder and stakes for climbing beans. Protect the environment Can do well on non fertile areas like steep slopes	Limited access to appropriate tree species seedlings, Management of on farm trees, Available land far off from roads.	Support and promote tree seedlings production, Train in nursery management skills, Management of trees on farm (extension / advisory service).	Wood preservation equipment Availing wood harvesting equipment
Tea	Suitable soils, Provided soil cover, control of erosion on steep slopes, Has industrial use. Factories are available and there plans to establish more High political support	Distant processing facilities, Poor roads, Inadequate planting materials.	Support the provision of planting materials, Research for high yielding varieties, Training in management skills, .	Establishment of a Factory within reach of the production areas Establishment of nurseries Management skills
Floriculture	Potential market, Suitable soils, Local demand.	Seed availability, Require high investment for green houses, Poor market information and linkages.	Identify investors, Market information and linkages, Training on management skills.	Contract farmers Green/glass houses Management skill
Sericulture	Available market in Bushenyi, Requires limited space.	Lack of access to eggs/ cocoons, Limited knowledge and skills on production, Transport cost for cocoons.	Provision of cocoons, Provision of murry berry cutting for planting, Skill training and management.	Source of cocoons Management skill

(b) Livestock and Fish Farming Enterprises

Enterprises	Available opportunities	Gaps in increasing productivity and commercialisation	Areas for intervention	Required infrastructure
Dairy	Favorable climate, Good pastures, Availability of AI services and good breeds, Experienced farmers.	Prevalence of tick borne diseases, Expensive drugs and poor distribution outlets, Limited land for expansion, Poor market for the milk, Limited value addition to increase shelf life.	Support tick control programmes, Promote value addition/agro processing, Support drugs and inputs distribution outlets in rural areas.	Milk processing and packing Management skill
Zero grazing	Uses small areas, Exploit the available family Labour, Promotes use of manure, Use of biogas.	Tick borne diseases, Inadequate pastures/ forage, Inadequate good high milking breeds. Poor market for the milk	Identify and source better quality breeds, which are high milking	Grade heifers Management skill
Goats	Ready market, Prolific, Hardy and resistant to diseases, Produce good quality manure.	No breeding programme, Good breeds are expensive.	Source improved breeds for multiplication, Skill enhancement in managing improved breeds Develop breeding program	good grade goats
Piggery	Matures quickly, High food converters, use food residues, Market locally available.	Management is poor, they are left to roam on free range , They are prone to diseases especially worms.	Improve on management especially housing and disease control.	Feed processing plants
Poultry	Require small land/ area, Availability of good breeds, Relatively cheap drugs and potential ready market.	Expensive poultry feeds with irregular supply and at times adulterated, Limited knowledge and skills for effective production.	Reliable feed formulation and certification at source and destination, Training in management skills, Market information and linkages.	Hatchery, poultry feeds manufacturing Management skills.
Apiary	There is market for produce and by products, Communities understand the use of and benefits of honey, There is work already going on. High industrial demand for bees wax	Diminishing foraging areas, Low yields, Unavailability of inputs and equipment, Inadequate processing skills,	Skill training in management and agro processing, Technologies for increasing swarms like queen raring	Queen bee rearing Skills in hive making Honey processing units Harvesting gears. Value addition
Fish farming	Market for fish, Uses limited space, Environmentally friendly especially in use on marginal land near wet lands, Availability of 3 private fish fry breeding centers Fish is highly nutritious.	Inadequate /unreliable sources of fish fry, Expensive materials like seine nets, High predation Limited management skills on feeding and water quality management. Limited knowledge on fish preservation.	Support fish fry production Skill enhancement in fish and water management and post harvest handling.	Fish fry centres
Hand crafts	Strong links with tourism. Uganda Community Tourism Association (UCOTA) is facilitating the marketing of handicrafts in Kisoro and Kabale	Lack of tools and equipment seasonality/ scarcity of raw materials Poor quality hence difficulty to meet international market requirements Lack of active product marketing	<ul style="list-style-type: none"> ➤ Training /skills development ➤ Support product development and marketing of handicrafts. ➤ Identification of commercially viable handcraft products 	

5.0 Summary , Conclusions and recommendations for enterprise short listing

It is noted that most of the services is mainly on production, paying little attention to the market value chain to complete the production consumption continuum. Natural resource management especially soil fertility management has also received little attention. Market value chain development and natural resource management need attention for profitable and sustainable agricultural production. The enterprise network mapping found a limited number of initiatives with success stories in linking farmers to markets. This was mainly on honey, potatoes, and handcrafts. Most of the farm produce is sold without undertaking value addition processes such as simple processing, packaging. Also market information services (prices, products, quality and quantity trends and regional differences) were noted to be limited. The market is dominated by private sector

Major opportunities identified:

1. NARO – UBL partnership for barley:

The above partnership has been initiated to promote barley, a product that is on highly demanded by Uganda Breweries limited (UBL). The work being undertaken being links quite well with Market Development Approach being advanced in EEEGL program. Much as the enterprise has only been tried in the region on a small scale, it presents a unique business opportunity for communities around protected areas because of the following attributes:

- Potential to serve as a buffer crop
- Short maturity period farmers harvest and start earning after 3 months
- Does not require a lot of capital investment
- Possibility of contract production because there is strong commitment of the buyer
- Comparative advantage in terms of most favorable agro-ecological conditions and taxes on imported barley and its products
- An agreement is already in place between UBL and KAZARDI for establishing a decentralized seed system

However this enterprise should be considered with extra care. The enterprise network assessment found bad experiences of Pyrethrum and Artemisia, the “golden promises” that have been turned to dust leaving farmers disappointed. These are new enterprises business former collapsed because the sole expatriate investor got financial problems while for the later farmers produced beyond the capacity of the processing company due to poor planning.

2. *Potential for potato value chain development through partnership with Uganda National Seed Potato Producers Association (UNSPPA) , Uganda National Agro-input dealers Association, and various market outlets.*

Potato It is a dominant crop in the project area. It is an income and food security crop in many households. It has an advantage of short growing period and high yielding. Climatic and soil conditions are conducive for its production. Agronomic practices are already known. There established research facilities under KAZARDI and organized seed multiplication scheme by UNSPPA. Market is available at the local and regional level. Several sub-sector studies have been done on it, the most recent one being the one done by the Italian funded Great Lakes Project. Documentation on the analyses is available. There are possibilities of developing strategic partnerships with FAO, KZARDI and Government programs on promotion of the enterprise especially Kabale and Kisoro where the project area is part of the agricultural zones that are planned for potato promotion.

3. *Potential for apiculture*

Apiculture was noted to play a role in nature conservation. The enterprise requires very little start up capital , less labour and does not require a lot of land. It can easily be practiced by men, women youth and disabled persons. The enterprise provides an opportunity for use of scarce resources for benefit of all community members. The enterprise assessment noted that the main bee product that is currently utilized in the region is honey. Locally it is used as an ingredient in drinks and confectionaries, it is also

used as an additive in various medicines and cosmetics. There are other bee products that have not been exploited in the region. The products and their uses are summarized below.

Product	Uses
Propolis	Used in preparation of skin ointments, cough mixtures, other medicinal preparations
Royal jelly	Sole food for the queen bee and very young bee larvae. It is rich in nutrients and therefore a good food supplement
Bee venom	Has therapeutic value and is used by specially trained professionals in the treatment of arthritic and rheumatoid conditions, neurological conditions certain ailments of circulatory system etc.
Bees wax	Used in cosmetics, polishes as a coating on tables and capsules and in creation of artistic and medicinal sculptures

4. Mushroom growing, opportunity for landless

Mushroom enterprise is recommended for further exploration. The enterprise has an advantage of utilizing limited space, it is not labour intensive and most of the materials used in its production are locally available. There is high potential for local and export market. A sub-sector study is needed on this enterprise.

APPENDICES

Appendix 1. ANALYSIS OF CROP ENTERPRISES PRODUCTIVITY AND GROSS MARGINS UNDER FARMERS PRACTICES AND THE AVAILABLE IMPROVED PACKAGES

ENTERPRISE	FARMER PRACTICES			IMPROVED PRACTICES			comments
	Average yields per unit area	selling price sh./kg	Gross output	Average yields per unit	Unit cost	Gross output	
Irish potatoes (ware)	10 t/ha	250	2,500,000	15 t/ha	250	3,750,000	Can have 3 crops per year
Irish potatoes (seed)	10 t/ah	500	5,000,000	15 t/ha	500	7,500,000	Can have 3 crops per year
Beans (bush)	1.5 t/ha	400	600,000	2.5 t/ha	400	1,000,000	Can have 2 crops a year
Beans (climbing)	2.5 t/ha	500	1,250,000	3.0 t/ha	500	1,500,000	Can have 2 crops per year
Sweet potatoes	3.5 t/ha	100	350,000	5 t/ha	100	500,000	
Banana	6.5 t/ha (433 bunches)	2000/bunch	866,000	500 bunches	2300	1,000,000	Harvesting is continuous
Wheat	2.0 t/ha	400	800,000	3.0t/ha	400	1,200,000	Can have 2 crops per year
Sorghum	1.5 t/h	450	675,000	3.0 t/ha	450	1,350,000	Can only have one crop per year
Cabbages	17,500 heads	100/head	1,750,000	17,500	200	3,500,000	Can have 3 crops per year
Carrots	10 t/ha	300	3,000,000	12 t/ha	300	3,600,000	Can have 3 crops per year
Tomatoes	7.5 t/ha	300	2,250,000	8.5 t/ha	200	2,550,000	Can have 3 crops per year
Cauliflowers	17,500 heads	150	2,625,000	17,500 heads	300	3,500,000	Can have 3 crops per year
Passion fruits	4.0 t/ha	500	2,000,000	5 t/ha	500	2,500,000	Can have 3 crops per year
Onions							Can have 3 crops per year
Apples	40,000 fruits	200	8,000,000	50,000 fruits	200	10,000,000	Can have 3 crops per year
Pineapples	17,000 heads/20 tons	100/head	1,700,000	17,000 heads/25 tons	150	2,550,000	
Avocado (grafted)	100 bags/10 t	10,000/bag	1,000,000	500 bags	10,000	5,000,000	Two harvests
Tea (Green leaf)	12 t/ha	200	2,400,000				Harvesting is continuous
Tobacco (Cured leaf)	1.4 t/ha						Two harvests
Artemisia	2.0 t/ha			2.5 t/ha	1,000	2,500,000	Two harvests
Barley	2 t/ha	600	1,200,000	3 t/ha	600	1,800,000	Two harvests

Appendix 2. GROSS MARGINS FOR LIVESTOCK ENTERPRISES UNDER FARMERS AND IMPROVED MANAGEMENT PRACTICES

Enterprise	FARMERS PRACTICES			IMPROVED PACKAGS			
	Average yields per unit	Average price per unit (Shs)	Gross output per year	Average yields per unit	Average price per unit (shs)	Gross output	
Improved cattle Dairy farm (milk)	2,100 liters/animal/year	250	525,000	3,150 liters of milk/animal/year	250	787,500	Milk for 7 months
Improved cattle zero grazing	2,520 liters of milk/year/animal	250	630,00	3,570 liters of milk/animal/year	250	892,500	Milk for 7 months
Indigenous cattle	135 lts milk /year/animal	250	33,750	2.5 lts day/animal	250	750,00	Milk for 4 months
Poultry local (eggs) unit 15 chicken	160 egg/year	200	480,000	180 eggs	200	540,000	
Poultry improved (layers) Unit 100 birds	NA			30,000 eggs/year	120	3,600,000	Productive for 3 years
Poultry improved (broilers) Unit 100 birds				100	5,000	500,000	Four times a year
Goats local Kigezi goat Unit 20 goats	20 kgs LW	30,000	600,000	25 kgs LW	50,000	1,000,000	
Goats improved Unit 10 goats	30 kgs LW	70,000	700,000	50 LW	150,000	1,500,000	Mainly for breeding
Goats improved Unit 10 goats	10 Kids	10,000	100,000	15 kids	15,000	225,000=	1.5 kids/improved goat/year
Pigs improved body weight Unit 10 pigs	30 LW	50,000	500,000	40 LW			
Pigs improved litter size Unit 10 pigs	8 piglets	15,000	3,600,000	12 piglets	15,000	1,800,000	Produces 2.5 times a year
Apiary local hives (unprocessed honey) Unit 15 hives	10 kgs	2,500	375,000				
Apiary KTB Unit 10 hives				20 kgs	2,500	500,000	
Fish farming tilapia 400 sq meter	500g	2,500	2,000,000	800 g	3,000	2,400,000	2 fish/ sq= m 800 fish
Fish farming clalious	800 g	3,000	2,400,000	1.0 kg	4,000	3,200,000	
Fish farming mirror carp	1.0 kg	2,500	2,000,000	2 kgs	3,500		

Appendix 3 Current Market Prices of the selected commodities in Kabale as of 10th December 2007

COMMODITY	AVERAGE WHOLE SALE (UShs)	AVERAGE RETAIL PRICE (UShs)
Milk and its by products		
- Fresh milk	350 per liter	400 per litre
- Yogurt	500 per ½ litre pkt	700 ½ litre pkt
- Cheese	5,000 per ½kg	6,000 per ½ Kg
- Cow ghee	6,000 per kg	7,000 per kg

Fish		
- Fresh (Tilapia)	4,000 per psc of 800 – 1000grms	5,000 per psc
- Dry (semotundu)	2,500 per psc of 500gms	3,000 per psc
- Fresh Mira cup	3,000 per psc of 500- 700gms	4,000 per psc
Vegetables		
- Dry onions	600 per kg	700 per kg
- Garlic	3,500 per kg	4,000 per kg
- Cabbages	200 per head of 1.5 –2kg	300 per head
- Fresh onions	500 per kg	600 per kg
- Carrots	500 per kg	700 per kg
- French beans	1,000 per kg	1,500 per kg
- Hot chili (Eshenda)	500 per kg	1,000 per kg
- Egg plants	400 per kg	500 per kg
- Cauliflowers	250 per head	300 per head
Beans		
- Nambale mixed	900 per kg	1,000 per kg
- Kanyobwa	900 per kg	1,000 per kg
- Local variety mixed	850 per kg	900 per kg
- Climbing (Misingiriro)	900 per kg	1,000 per kg
Irish potatoes (solanum)		
- Ware potatoes	30,000 per bag of 100 kgs	35,000 per bag of 100kgs
- Seed (Improved)	80,000 per bag of 100kgs	100,000 per bag
Honey		
- Processed	7,000 per kg	10,000 per kg
- Un processed	3,500 per kg	7,000 per kg

Annex 5: Current prices of the selected commodities in Kisoro

S/N	Commodity	Quantity	Retail Price	Whole Sale Price	Remarks
1	Vegetables				
(i)	Tomatoes	5 tomatoes	200-500/=		Price range deter by scarcity/plenty
		Basket of 100tomatoes		6,000-7,000/=	Price range deter by scarcity/plenty
		Basket of 75 tomatoes		6,000/=	
(ii)	Onions	6-8 onions	200-500/=		Price range deter by scarcity/plenty

		Fresh			
		100 onions fresh		2,150-4,300/=	Price range deter by scarcity/plenty
		12 dry onions	400-500/=		
		100 onions		4,000-5,000/=	When in plenty
				12,000-13,000/=	When Scarce
(iii)	Carrots	6-7 carrots	400-500/=		During Scarcity
		9-10 carrots	400-500/=		During plenty
		100kgs		20,000/=	Average price
(iv)	Cabbage	Pcs according to size	100-500/=	50-300/=	whole sellers on longer sell in bags to retailers in Kisoro
2	Beans				Profit Margin for retailers is 50/=
(i)	Nambale	1.1kgs	1,200/=	1,050/=	
(ii)	Mixed varieties	1.1kgs	1,300/=	1,250/=	
(iii)	Umwizirahenda	1.1kgs	1,700/=	1,650/=	
(iv)	Nabe 12c- Sugar 31	1.1kgs	1,600-1,700	1,550-1,650/=	
(v)	Umwigondore	1.1kgs	1,300/=	1,250/=	
(vi)	Mushari	1.1kgs	1,700/=	1,650/=	
(vii)	Bwanalensi	1.1kgs	1,300/=	1,250/=	
3	Irish Potatoes	A bag (100kgs)	28,000/=	25,000/=	These prices are market area prices not farm gate.
(i)	Kinigi	Baskets of different sizes	500-5000/=		
(ii)	Petro	Baskets of different sizes	400-4000/=		
(iii)	Sutama	Baskets of different sizes	450-4500/=		
4	Honey(KIBEKO)				
	Buying from farmers	1kg	3,100/=	-	
	Selling	0.5kgs	3,000/=	3,000/=	Whole sale and retail prices are the same because of the shoprte market

: Estimated acreages of major Crop Enterprises; 2003-2005.

Crop Enterprise	Estimated area Planted (Year/ Ha.)		
	Kabale	Kisoro	Kanungu
Irish potatoes (ware)	43,940		
Irish potatoes (seed)	600		
Beans (bush)	45,700		
Beans (climbing)	1,000		
Sweet potatoes	16,405		
Peas	7,950		
Banana	3,500		
Wheat	2,000		
Sorghum	19,470		
Cabbages	2,070		
Carrots	440		
Tomatoes	1,150		
Cauliflowers	524		
Passion fruits	350		
Onions	450		
Apples	150		
Pineapples	450		
Avocado	NA		
Tea	13		
Tobacco	675		
Artemisia	NA		
Coffee Arabica	NA		
Barley	NA		

NA=Not available

Source; Kabale District Local Government planting returns. 2006

Processing facilities

The following processing facilities exist in Kabale District

- | | | |
|-----|---------------------------|-----|
| (a) | Milk cooling plants | 3 |
| (b) | Yoghurt making | 4 |
| (c) | Cheese making | 2 |
| (d) | Bakery and confectionery | 6 |
| (e) | Cereals and grain milling | 112 |
| (f) | Honey processing | 3 |
| (g) | Fruit processing (wine) | 1 |

- (h) Beer brewing
- (i) Grain frying (ground nuts, maize, etc)
- (j) Irish potato processing chrips and seed

Source: *Kabale District agricultural Zoning document*

Annex 8: List of References Consulted

- District Development Plan* – Kanugu Local Government Authority – 2008-2011
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District Development Plan – Kisoro Local Government Authority – 2008-2011
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Enterprise Networking Mapping Report – EEEGL project – April 2008
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