



SUSTAINABLE DEVELOPMENT OF PETROLEUM RESOURCES PROGRAMME

Annual Budget Monitoring Report

Financial Year 2024/25

September 2025

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ABBREVIATIONS AND ACRONYMS

AGI	Above Ground Installation
AGRC	Albertine Graben Refinery Consortium
CNOOC	Chinese National Offshore Oil Corporation
CPF	Central Processing Facility
DP	Directorate of Petroleum
EACOP	East African Crude Oil Pipeline
FEED	Front End Engineering Design
FID	Final Investment Decision
GoU	Government of Uganda
HSE	Health Safety and Environment
IA	Implementation Agreement
IFMS	Integrated Financial Management System
JST	Jinja Storage Terminal
KIP	Kabalega Industrial Park
KST	Kampala Storage Terminal
LPG	Liquefied Petroleum Gas
MDAs	Ministries, Departments and Agencies
MEMD	Ministry of Energy and Mineral Development
MoFPED	Ministry of Finance, Planning and Economic Development
MoJCA	Ministry of Justice and Constitutional Affairs
MLHUD	Ministry of Lands, Housing and Urban Development
MPS	Ministerial Policy Statement
NDP III	Third National Development Plan
NEMA	National Environment Management Authority
NOGTR	National Oil and Gas Talent Register
NPDR	National Petroleum Data Repository
NPP	National Petroleum Policy
NSD	National Supplier Database
NTR	Non-Tax Revenue
PAPs	Project-Affected Persons
PAU	Petroleum Authority of Uganda
PBS	Programme Budgeting System
PIAP	Programme Implementation Action Plan
PIP	Public Investment Plan
PS	Pumping Station
PUF	Polyurethane Foam
QHSSE	Quality Health, Safety, Security and Environment
RAP	Resettlement Action Plan
RMP	Reservoir Management Plan
RTMC	Real-Time Monitoring Centre
SDPR	Sustainable Development of Petroleum Resources
SEA	Strategic Environmental Assessment
SMEs	Small and Medium Enterprises
UDB	Uganda Development Bank
UNBS	Uganda National Bureau of Standards
UNOC	Uganda National Oil Company



FOREWORD

The Government of Uganda outlined strategies, for FY 2024/25, to restore the economy back to the medium-term growth path with the ultimate vision of a self-sustaining, integrated economy. The strategies emphasized accelerating commercial agriculture, fostering industrialization, and expanding both service sectors and digital transformation. Key areas of focus included enhancing market access and leveraging technological advancements to drive economic growth.

The strategic interventions that were prioritized under various programmes included: roads under Integrated Transport and Infrastructure Services; electricity under the Sustainable Energy Development; irrigation under Agro-Industrialization; Industrial parks under Manufacturing; support to medical schools and science-based research and development under Human Capital Development; as well as oil and gas among others.

The Annual programme assessments have been made, and it was established that performance was fairly good. This implies that programmes are on track, but with a lot of improvements required. The challenges noted, are not insurmountable. These monitoring findings form a very important building block upon which programmes can re-strategize for FY 2025/26.

The government has embarked on the 10-fold growth strategy that demands for enhanced efficiency and effectiveness within programmes. We cannot afford to have fair performance scores hence forth, as this will jeopardize the prospects of doubling the economic growth rates in the medium term.

Partick Ocailap
For Permanent Secretary Secretary to the Treasury



EXECUTIVE SUMMARY

The Sustainable Development of Petroleum Resources Programme budget for FY 2024/25 was revised to US\$ 1.006 trillion from US\$ 829 billion to cater for additional equity financing for the East African Crude Oil Pipeline (EACOP). The release was fair, at US\$ 625.62 billion (62.5%), with good absorption, at US\$ 623.01 billion (99.6%), by 30th June 2025.

The overall physical performance of the Sustainable Development of Petroleum Resources Programme was fair, at 69.6%. One of the highlights during FY 2024/25 was the conclusion of financing arrangements for the EACOP with a syndicate of financial institutions. The number of Ugandans directly employed in oil and gas increased by 32% to 17,203, as compared to the previous FY 2023/24, with the overall local participation in upstream and midstream oil and gas activities at 54,954. The non-tax revenue from the oil and gas activities also saw a modest increase of 13% to US\$ 208.09 billion from the previous financial year.

During the NDP III period, oil revenue and sector employment expanded significantly, with jobs surpassing the target. Local content improved through firm registration and contract awards, though both fell short of the NDP III planned targets. The development of the East African Crude Oil Pipeline (EACOP) and the refinery, the NDP III core projects, was, however, not completed as targeted. The EACOP was ongoing at 60%, whereas the refinery had not commenced, pending financial closure. The storage capacity for refined petroleum products also remained unchanged due to delays in developing new terminals.

Under the three sub-programmes in the oil and gas value chain, progress continued towards commercial oil production.

The Upstream Sub-programme performance was fair, at 64.4%. The geological and geophysical data acquisition in the Lake Kyoga basin commenced with the annual target of 100-line km achieved. The exploration of the Moroto Kadam basin resumed after works were earlier suspended due to insecurity in the region. The third licensing round for additional prospective explored areas was pending the development of the third licensing strategy and plan, and thus no new exploration licenses were granted. Poor performance was noted in the equipping of the National Data Petroleum Repository (NDPR) and development of the integrated management systems due to a lack of funding.

Fair progress was observed in the construction of the Central Processing Facilities (CPFs) to fast-track production of the first oil. The overall construction of the CPFs progressed to 60.4% from 39.9% in the previous financial year, but was behind schedule. The development of Tilenga and Kingfisher upstream facilities was at 57% and 69.6%, respectively. Cumulatively, a total of 148 wells (134 at Tilenga, 14 at Kingfisher) out of the targeted 189 (179 at Tilenga, 19 at Kingfisher) for first oil production had been drilled. The Resettlement Action Plan (RAP) for Kingfisher was completed, and in the Tilenga exploration area, RAP was being concluded, with 99.1% of PAPs paid, while all resettlement houses had been completed and handed over.

The laying of the feeder pipeline to transport oil from the Kingfisher CPF to the export hub in Kabalega Industrial Park, Hoima, was completed, while the pipe laying for the feeder pipeline from Buliisa was ongoing, with progress at 67%. The laying and installation of flow lines from the well pads to the CPFs in Kingfisher and Tilenga were ongoing.



The performance of the Midstream Sub-programme was rated fair at 65.9%, with the development of midstream infrastructure progressing at various stages. Financial closure for the debt financing of EACOP was achieved in March 2025, and the partners' 40% equity contribution was fully met. However, due to delays in securing debt financing, the Government of Uganda (GoU) provided cash calls amounting to USD 68 million in the first half of the financial year.

By the reporting period, EACOP construction works had reached 64.1% completion, with 90% of the insulated pipes already delivered. Pipe assembly and welding were ongoing, with over 500 km of the 1,443-km pipeline completed. In addition, works on the six pumping stations designed to boost crude oil pressure, as well as the 15 pipeline yards and main camps for pipe storage and staff accommodation along the EACOP route, were steadily progressing.

Under refinery development, a development partner, Alpha MBM, was acquired for the debt financing worth about USD 2.8 billion (70%), and the Implementation Agreement (IA) was signed on 29th March 2025. The negotiations for the Crude Supply Agreement between the Uganda National Oil Company (UNOC) and its upstream partners (Total Energies and CNOOC) were ongoing, and the Shareholders Agreement negotiations with the partner were also anticipated to begin at the start of FY 2025/26. The second phase of the refinery equity disbursement worth US\$ 140 billion was released during FY 2024/25, bringing the cumulative equity disbursements to US\$ 287.69 billion since FY 2023/24.

Promotion of national participation and local content in oil and gas activities continued to be a priority in the oil and gas sector. More than 1,075 Ugandans were registered on the National Oil and Gas Talent Register to enhance the participation of Ugandans in oil and gas activities. The Ugandans employed directly and indirectly in the sector were 17,203 and 39,567, respectively, by the end of June 2025. This was a 32% increase between June 2024 and June 2025. Ugandan firms also benefitted from 233 (72%) of the 321 contracts awarded during the financial year.

The Downstream Sub-Programme performance was good, at 78.7%. MEMD resumed promotion of Liquefied Petroleum Gas (LPG) as a substitute for charcoal after it stalled during FY 2023/24 due to the low funding allocation. A total of 14,136 cylinder kits (82% of the annual target) were disseminated during FY 2024/25. MEMD monitored downstream petroleum trading operations for quality compliance, and a total of 2,078 retail outlets were inspected, and enforcement was undertaken in 822. The quality compliance levels remained high, at 99.4%, for the 81% average retail coverage inspected.

UNOC also continued importing petroleum products in line with the sole mandate as per the new Petroleum Supply Act. On average, UNOC imported 220 million litres of fuel per month for distribution on the local market during the financial year. However, no funding was provided by the GoU for restocking the Jinja Storage Facility (JST); therefore, the facility was being used for trading rather than as a strategic reserve.

Challenges

- i. The delay in the works of the critical oil infrastructure, especially the Central Processing Facility in the Tilenga area and EACOP, is jeopardising the timeline for the country's first oil production.
- ii. The management of expectations regarding the benefits from the oil and gas sector remains a major challenge, especially in the project areas of the Albertine region.



Conclusion

Petroleum exploration in the Kyoga and Moroto-Kadam basins made fair progress, though no new licenses were issued under the third licensing round. Construction of Central Processing Facilities reached 60% but was behind schedule, while the Kingfisher feeder pipeline to the export hub was completed.

In midstream, financial closure for EACOP was achieved, with progress rising from 13% to 33%, and a Refinery Implementation Agreement was signed. Local participation improved, with Ugandan firms securing 75% of contract value, although the Local Content Fund was not established.

The Jinja Storage Terminal was restocked but remained constrained by funding, while the LPG household cylinder distribution programme resumed, reaching 14,136 kits. Compliance with petroleum product standards was high, at 99.4%. However, delays in data management, the national data repository, and the upstream petroleum laboratory, caused by funding shortfalls, limited performance in key areas.

Recommendation

The Joint Venture Partners should commit more resources to the ongoing key projects and prevent further disruptions to the ongoing EACOP construction due to funding constraints.



CHAPTER 1: BACKGROUND

1.1 Background

The mission of the Ministry of Finance, Planning and Economic Development (MoFPED) is: “To formulate sound economic policies, maximise revenue mobilisation, and ensure efficient allocation and accountability for public resources so as to achieve the most rapid and sustainable economic growth and development”.

MoFPED, through its Budget Monitoring and Accountability Unit (BMAU), tracks the implementation of programmes/projects by observing how values of different financial and physical indicators change over time against stated goals and indicators. BMAU work is aligned with budget execution, accountability, and service delivery.

Commencing in FY 2021/22, the BMAU began undertaking Programme-Based Monitoring to assess performance against targets and outcomes in the Programme Implementation Action Plans (PIAPs)/Ministerial Policy Statements. Semi-annual field monitoring of Government programmes and projects verified fund receipt and expenditure, assessed outputs and outcomes, and evaluated gender and equity compliance in budget execution. The monitoring also reviewed the level of cohesion between sub-programmes, and noted implementation challenges.

The monitoring covered the following programmes: Agro-Industrialisation; Community Mobilisation and Mindset Change; Digital Transformation; Human Capital Development; Innovation, Technology Development and Transfer; Integrated Transport Infrastructure and Services; Manufacturing; Mineral Development; Natural Resources, Environment, Climate Change, Land and Water Management; Public Sector Transformation; Sustainable Development of Petroleum Resources; and Sustainable Energy Development.

This report presents findings from the annual monitoring of selected interventions under the Sustainable Development of Petroleum Resources Programme for the period 1st July 2024 to 30th June 2025.

1.2 Programme Goals and Objectives

The Sustainable Development of Petroleum Resources (SDPR) Programme aims to attain equitable value from petroleum resources and spur economic development in a timely and sustainable manner.

The key programme objectives are to:

- i. Ensure sustainable production and utilisation of the country’s oil and gas resources.
- ii. Strengthen policy, legal and regulatory frameworks as well as the institutional capacity of oil and gas industry.
- iii. Enhance local capacity to participate in oil and gas operations.
- iv. Promote private investment in the oil and gas industry.
- v. Enhance Quality Health, Safety, Security and Environment.
- vi. Improve security of supply of refined petroleum products.



The key expected results include:

- i. Reducing the volume and value of imported petroleum and petroleum products.
- ii. Increasing revenue from the oil and gas industry and its contribution to Gross Domestic Product (GDP).
- iii. Creating more employment opportunities for Ugandans along the petroleum value chain.

1.3 Sub-programmes

The programme is comprised of three sub-programmes, namely:

- i. The Upstream Sub-programme, which covers promotion, licensing, exploration, development and production of oil and gas.
- ii. The Midstream Sub-programme, which includes transportation, refining of oil and conversion of gas.
- iii. The Downstream Sub-programme, which deals with the distribution of petroleum products.

The lead implementing Ministry for the programme is the Ministry of Energy and Mineral Development (MEMD), whereas the Petroleum Authority of Uganda (PAU) and the Uganda National Oil Company (UNOC) are key agencies in implementation. Other key partners in the programme are the Ministry of Finance, Planning and Economic Development (MoFPED), the National Environment Management Authority (NEMA), Uganda National Bureau of Standards (UNBS) and the private Joint Venture Partners (Total Energies, China National Offshore Oil Corporation (CNOOC), the East African Crude Oil Pipeline Company (EACOP)).

1.4 Programme outcomes

The expected outcomes under the Sustainable Development of Petroleum Resources Programme are:

- i. Increased revenue from oil and gas resources.
- ii. Increased contribution of the oil and gas sector to employment.
- iii. Increased contracts awarded to Ugandan firms in the oil and gas value chain.
- iv. Increased private investment in the oil and gas industry.
- v. Improved safety in the oil and gas industry.
- vi. Increased days of security stock levels of refined petroleum products.
- vii. High-quality supply of refined petroleum products.



CHAPTER 2: METHODOLOGY

2.1 Scope

This monitoring report is based on selected interventions in the Sustainable Development of Petroleum Resources Programme covering the three sub-programmes. The interventions and respective outputs reviewed under each sub-programme, Ministry, Department and Agency/(MDAs)/Vote are listed in *Annex I*. Monitoring involved analysis and tracking of inputs, activities, processes, and outputs in the Ministerial Policy Statements (MPSs), annual and quarterly work plans and progress and performance reports of MDAs. A total of 14 interventions were reviewed. The 14 reviewed interventions translated into 83.7% coverage of the projected funding under the MPS allocation.

The selection of interventions to monitor was based on the following criteria:

- 1) Significant contribution to the programme objectives and national priorities.
- 2) Levels of investment and interventions that had a large volume of funds allocated were prioritised .
- 3) Planned outputs whose implementation commenced in the year of review, whether directly financed or not.
- 4) Completed projects to assess beneficiary satisfaction, value for money and intermediate outcomes.

2.2 Data Collection and Analysis

2.2.1 Data Collection

Both qualitative and quantitative methods were used in the monitoring exercise. The physical performance of interventions, planned outputs and intermediate outcomes were assessed by monitoring a range of indicators. The progress reported was linked to the reported expenditure and physical performance.

The monitoring team employed both primary and secondary data collection methods. Secondary data collection methods included:

- i) Literature review of key policy documents, including Ministerial Policy Statements (MPSs) for FY 2024/25; National and Programme Budget Framework Papers; Re-prioritised Programme Implementation Action Plans (PIAPs), quarterly progress reports and work plans for the respective implementing agencies, quarterly performance reports, the Budget Speech, Public Investment Plans, approved estimates of revenue and expenditure, project reports, strategic plans and policy documents.
- ii) Review and analysis of data from the Integrated Financial Management System (IFMS), Programme Budgeting System (PBS), and Quarterly Performance Reports.

Primary data collection methods, on the other hand, included:

- i) Consultations and key informant interviews with institutional heads, and project managers at various implementation levels.
- ii) Field visits to various districts, for primary data collection, from household heads, and service beneficiaries; observation and photography.
- iii) Call-backs in some cases, which were made to triangulate information.

2.2.2 Data Analysis

The data was analysed using both qualitative and quantitative approaches. Qualitative data was examined and classified in terms of constructs, themes or patterns to explain events among the beneficiaries (interpretation analysis), and reflective analysis, where the monitoring teams provided an objective interpretation of the field events.

Quantitative data, on the other hand, was analysed using advanced Excel tools that aided interpretation. Comparative analyses were done using percentages, averages, and cross-tabulations of the outputs/interventions, intermediate outcome indicators and the overall scores. Performance of outputs/interventions and intermediate outcomes was rated in percentages according to the level of achievement against the annual targets. The sub-programme score was determined as the average percentage ratings for the outputs and intermediate outcomes in the ratio of 65%:35%, respectively.

The overall programme performance was the average of the individual sub-programme scores assessed. The performance of the programme and sub-programme was rated based on the criteria in **Table 2.1**. Based on the rating assigned, a BMAU colour-coded system was used to alert the policymakers and implementers to whether the interventions were achieved or had very good performance (green), or good performance (yellow), fair performance (light gold), and poor performance (red).

Table 2.1: Assessment guide to measure performance for FY 2024/25

Score	Performance Rating	Comment
90% and above	Green	Very Good (Achieved at least 90% of outputs and outcomes)
70% – 89%	Yellow	Good (Achieved at least 70% of outputs and outcomes)
50% – 69%	Light Gold	Fair (Achieved at least 50% of outputs and outcomes)
49% and below	Red	Poor (Achieved below 50% of outputs and outcomes)

Source: Author's Compilation

Ethical considerations

Introduction letters from the Permanent Secretary/Secretary to Treasury were issued to the respective MDAs monitored. Consent was sought from all respondents, including programme or project beneficiaries. All information obtained during the budget monitoring exercise was treated with a high degree of confidentiality.

2.3 Limitation

Lack of disaggregated financial information for some of the outputs.

2.4 Structure of the Report

The report is structured into four chapters. These are: 1) Introduction; 2) Methodology; 3) Programme performance; and 4) Conclusion and Recommendations.



CHAPTER 3: PROGRAMME PERFORMANCE

3.1 Overall Programme Performance

Financial Performance

The Sustainable Development of Petroleum Resources Programme budget for FY 2024/25 was revised to US\$ 1.006 trillion from US\$ 829 billion to cater for additional equity financing for the East African Crude Oil Pipeline (EACOP). The release was fair, at US\$ 625.62 billion (62.5%), with good absorption at US\$ 623.01 billion (99.6%) by 30th June 2025.

The Midstream Sub-programme took 80.5% of the programme budget with funds for EACOP cash calls, and equity and debt financing for the oil refinery taking the largest share. The Midstream Sub-programme also had the lowest release, at 53%, due to delays in concluding the financial closure of the oil refinery, which prevented disbursements from kicking off (Table 3.1).

Table 3.1: Financial performance of the Sustainable Petroleum Development Programme by 30th June 2025

Sub-programme	Budget (US\$ billion)	Release (US\$ billion)	Expenditure (US\$ billion)	Release as % of Budget	Expenditure as % of Release
Upstream	175.55	175.17	173.21	99.8	98.9
Midstream	809.80	430.05	429.41	53.1	99.9
Downstream	20.42	20.40	20.39	99.9	100
Total	1,005.78	625.62	623.01	62.2	99.6

Source: Approved Budget Estimates and Q4 Reports FY2024/25

Physical Performance

The overall sector performance was rated fair, at 69.6% (Table 3.2). Outcome performance was assessed as good, while output performance was fair. In terms of outcomes, revenue from oil and gas activities amounted to US\$ 208.09 billion, representing 79% of the annual target, although no new exploration licenses were issued. Under midstream, local firms benefited from 73% of the contracts by number and 75% by contract value. The Ugandans directly employed in the sector also increased by 32%, to 17,203 from the previous financial year. The level of compliance with downstream refined petroleum products was also good, at 99.4%, with a stock level of 10 days.

Over the National Development Plan III period (FY 2020/21 – FY 2024/25), the oil revenue grew from US\$ 62.98 billion to US\$ 208.09 billion, but short of the NDP III target of US\$ 265 billion. As a result of the infrastructural development over the past five years, the number of employees in the sector has expanded significantly. The number of Ugandans employed directly and indirectly in oil and gas rose from 3,400 to 54,954, meeting the NDP III target of 50,000. A total of 2,386 Ugandan firms were also registered (63% of the target) on the National Supplier Database (NSD) as a means to capture local content. Local firms also benefitted from a total of 678 contracts, though this did not meet the 1,035 target. However, there was no significant increase in national storage for refined petroleum products over the period due to a delay in the development of additional storage terminals.

At the annual output level, construction of the upstream facilities for oil production in Tilenga and Kingfisher reached 57% and 69.6% completion, respectively. However, both projects were

behind schedule. Exploration activities aimed at identifying additional petroleum potential in the Kyoga, Albertine and Moroto-Kadam basins showed fair progress.

In the midstream infrastructure segment, construction of EACOP progressed to 33%. Of the total pipeline, 90% (approximately 1,300 km) of the line pipes had been delivered to Tanzania, 58% (832 km) had been coated, and 755 km had been dispatched to the construction sites. The financial closure for EACOP was also reached in March 2025 with a syndicate of financial institutions. The Implementation Agreement for the oil refinery was also signed with the private investor, Alpha MBM, to pave the way for key agreements and financial closure.

Regulatory oversight of downstream activities continued, achieving a compliance rate of 99.4%, with 81% of outlets monitored. Efforts to promote the use of Liquefied Petroleum Gas (LPG) resumed, with a total of 14,136 cylinder kits distributed in various districts.

Table 3.2: Overall Performance of the Sustainable Development of Petroleum Resources Programme

	Sub-programme	Performance (%)	Remark
1	Upstream	64.4	Fair Performance
2	Midstream	65.9	Fair Performance
3	Downstream	78.7	Good Performance
Overall Programme Performance		69.6	Fair Performance

Source: Author's Compilation

3.2 Upstream Sub-Programme

The Upstream Sub-programme covers the promotion, licensing, exploration, development and production of petroleum resources. It also monitors all petroleum upstream operations to ensure the exploitation of the petroleum resource is undertaken in an economically and environmentally conducive manner. The outcomes for the sub-programme include: amount of revenue from the oil and gas sector; level of upstream oil and gas compliance; number of exploration licenses issued; and percentage change in amount of revenue from oil and gas. The implementing agencies are the MEMD, the Petroleum Authority of Uganda (PAU) and Uganda National Oil Company (UNOC).

The planned interventions in the sub-programme for FY 2024/25 that were monitored were:

- Undertake further exploration and ventures of the Albertine Graben and Moroto-Kadam basin.
- Undertake construction and operationalisation of upstream infrastructure projects.
- Construct the Central Processing Facilities (CPFs) for Tilenga and Kingfisher Projects.
- Review and update relevant policies, and harmonise conflicting laws and regulations.
- Establish Quality, Health, Safety, Security and Environment (QHSSE) governance and assurance framework

The overall Upstream Sub-programme performance was fair, at 64.4%, with both outcomes and outputs performing fairly. On outcomes, the target for the level of compliance of upstream operations was met, and the revenue from oil and gas was US\$ 208.09 billion (78.5% of target). No new exploration licenses had been granted because the third licensing round had not commenced. The development of the third licensing strategy to kick-start the round was underway.

Under output performance, the target for data acquisition in the Kyoga basin was met, and petroleum exploration in the Moroto-Kadam basin resumed, albeit with slow progress due to



insecurity in the sub-region. The construction of the Central Processing Facilities (CPFs) in Kingfisher and Tilenga development areas progressed to 60%, but behind schedule. The development of the National Data Petroleum Repository (NDPR) showed fair progress, with works for modern core store, which is one of the five components, being completed.

Performance of the Interventions

The performance of the interventions was fair, at 67.9%. All five monitored interventions performed fairly. The construction of CPFs to fast-track the production of the first oil progressed to 60%, with 155 wells drilled, and exploration activities in Moroto Kadam resumed. The equipping of the petroleum upstream laboratory under MEMD and PAU was still lagging, with only one of the five components completed (Table 3.3).

Table 3.3 Performance of interventions in the Upstream Sub-programme

Intervention	Performance Rating (%)	Remarks
Undertake further exploration and ventures of the Albertine Graben	67.5	Kyoga basin survey performance was good and Moroto-Kadam resumed. The third licensing round was yet to begin.
Undertake construction and operationalisation of infrastructure projects	58.5	The equipping of the NDPR was at 40% progress, with works on two of five components ongoing.
Construct the Central Processing Facilities (CPFs) for Tilenga and Kingfisher projects	68.6	The overall progress of the development of CPFs was at 60%, with a total of 155 of the 457 wells drilled.
Review, update relevant policies, and harmonise conflicting laws and regulations	65	Final draft of the National Petroleum Policy (NPP) implementation plan was developed and the Strategic Environment Assessment (SEA) report was finalised. Upstream standards were not developed.
Establish Quality, Health, Safety, Security and Environment (QHSSE) governance and assurance framework	90	Eleven (11) stakeholder engagements were conducted and four (04) staff training sessions were held.

Source: Author's Compilation

3.2.1 Undertaking further exploration and ventures of the Albertine Graben and Moroto-Kadam Basin

This intervention aims to establish petroleum potential in the country through undertaking exploration activities in the Albertine Graben (Hoima, Masindi, Nwoya, Buliisa), Moroto-Kadam and Lake Kyoga basins. The planned output was new exploration activities undertaken and promotion of the country's petroleum potential, with the following targets:

- Exploration of the frontier basins: The basins included the Moroto-Kadam, Kyoga, Lake Edward-George and Albertine Graben basins. The annual targets were: acquisition of 100 line-km of geophysical data plus geological and geochemical mapping of 100 sq. km in the Moroto-Kadam basin, as well as undertaking sensitisation exercises in the frontier basins (Moroto-Kadam, Lake Kyoga and Hoima); and acquisition of 100 line-km of geophysical data and geological and geochemical mapping of 100sq. km in the Kyoga basin.
- Promotion of the country's petroleum potential through undertaking the third licensing round and development of a speculative survey promotion framework.



- Acquiring specialised equipment and maintaining specialised software packages to aid in the analysis and interpretation of seismic data from explored petroleum reservoirs.

Performance

The performance of the intervention was fair, at 67.5%. The exploration activities showed fair progress, and the preparatory activities for the third licensing round were ongoing.

Exploration of the Frontier Basins

The geological and geophysical data acquisition in the Lake Kyoga basin to ascertain petroleum potential commenced, achieving 133 km of geophysical data and 120 sq. km of geological and geochemical data. The exploration of the Moroto-Kadam basin resumed after works were earlier suspended due to insecurity in the sub-region. In addition, geochemical surveys and source rock evaluations were conducted in the prospective areas of Lakes Edward, George, Albert and Semliki basins to guide further detailed assessment of petroleum potential in the area. Additionally, desk reviews and one field excursion for the Lake Edward-George basin were completed, and a basin resource analysis was underway.

Promotion of Petroleum Potential

Following the conclusion of the second licensing round, the Ministry of Energy and Mineral Development (MEMD) commenced preparatory activities for the launch of the third licensing round. Stakeholder engagements were conducted to inform the development of the third licensing round strategy and plan; however, the strategy had not yet been finalised to initiate the process. Once completed, the strategy will pave the way for the production and distribution of promotional materials for the areas earmarked for licensing and facilitate the prequalification of companies to participate. Consequently, no new exploration licenses were granted during the reporting period.

In addition, MEMD promoted the surveying of unexplored parts of the Albertine Graben to speculative companies, pending reconnaissance survey studies in areas of interest within the already explored regions

Acquisition and Maintenance of Specialised Upstream Equipment

The targets were: purchase of specialised upstream software (PETREL, Geosoft, Geox, PIGI licenses for data analysis) and maintenance of laboratory equipment (Hawk analyser, Gas chromatography).

The procurement process for renewing the software licenses with the service provider, Schlumberger, had not been concluded, pending the resolution of some technical issues. On the other hand, other procurements, such as the maintenance of geophysical laboratory equipment, as well as the acquisition of eight desktop computers and six laptops, were completed.

Other achievements included preparing regulatory reports on petroleum reserve estimates and conducting compliance assessments. The intervention also continued to regulate upstream activities, including the monitoring and review of exploration licenses in the Albertine Graben, such as seismic and well data interpretation for the Kasuruban contract area.



3.2.2 Undertaking construction and operationalisation of infrastructure projects to ease monitoring of upstream activities

The intervention was aimed at establishing the enabling infrastructure to support the upstream petroleum operations. The major goal of the intervention is to establish a National Petroleum Data Repository (NPDR) which will integrate data from MEMD and PAU. The annual outputs for FY 2024/25 were:

- A Petroleum Geoscience Laboratory established.
- A National Petroleum Data Repository (NPDR) developed.

Performance

The performance of the intervention was fair, at 58.5%. The achievements are discussed below:

Petroleum Geoscience Laboratory and Integrated Data Management System Development

The procurement of workstations, desktop computers and laptops was concluded. The consultant to undertake a needs assessment for the laboratory was acquired and other procurements, such as for furniture, also progressed. However, the development of the data management system was not undertaken despite the availability of funds, pending harmonisation of the data management mandate between MEMD and PAU. The procurement of installation of specialised upstream equipment had also not yet begun at the time of reporting.

Development of the National Petroleum Data Repository

The National Petroleum Data Repository (NPDR) consists of five components to be developed and housed at the PAU data centre, namely: Modern core; seismic data tape storage; offsite data backup and disaster recovery; data management hardware and software applications; and Real-Time Monitoring Centre (RTMC).

The annual targets under the output were: Data management hardware and software applications acquired and integrated; 50% completion of the Business Continuity and Disaster Recovery System; and 100% completion of a modern and well equipped store.

The development of the NPDR progressed slightly to 40% by 30th June 2025, from 37% as at the end of the previous financial year. The contract for completion of the development of the modern store, worth US\$ 3.897 billion was awarded, and works were nearing completion.

The contract for the development of the Business Continuity and Disaster Recovery System had been awarded, with all budgeted funds released, and works were at 40% progress, against the targeted 50%.

However, the works under the remaining components of the NDPR, namely seismic data tape storage, data management hardware and software applications, and Real-Time Monitoring Centre (RTMC), were pending. Consequently, the NDPR was not fully operational.



3.2.3 Constructing the Central Processing Facilities for Tilenga and Kingfisher Projects

The development of infrastructure under this intervention includes: well drilling, construction of flow lines connecting the fields (Tilenga¹ and Kingfisher²) to the CPFs, construction of the feeder pipeline from the CPF to the export hub in Kabaale, Hoima, and implementation of a Resettlement Action Plan (RAP) for persons affected by the project infrastructure, as well as construction of other supporting infrastructure, such as temporary and permanent operation support base camps. The CPF consists of a series of tanks and piping systems through which the produced oil and the associated gas will be processed to remove any unwanted mixtures, such as water and sand, before transportation to the export hub in Hoima.

The planned outputs under the intervention for FY 2024/25 were CPFs constructed; RAP for the Kingfisher and Tilenga fields completed; and supporting infrastructure constructed.

Performance

The performance of the intervention was fair, at 68.6%. There was notable progress of the development of the upstream CPFs to 60%. The Tilenga Project had progressed to 57%, while the Kingfisher Project advanced to 69.6%, up from 38.1% and 48.1%, respectively, in the previous financial year. At the time of monitoring, four drilling rigs were in operation – three in the Tilenga area and one in Kingfisher.

More 90 wells (84 at Tilenga, 6 at Kingfisher) were drilled during the financial year, bringing the cumulative total to 155 wells (140 at Tilenga, 15 at Kingfisher) out of the targeted 189 (179 at Tilenga, 19 Kingfisher) for first oil production. The Resettlement Action Plan (RAP) for Kingfisher was completed, and in the Tilenga exploration area, RAP was being concluded with 99.1% of PAPs paid, while all resettlement houses had been completed and handed over.

Tilenga Development Area

The Tilenga has a total of 426 wells drilled at 31 well pads and expected to produce 190,000 barrels per day at peak production over six³ (06) production licenses. The construction of the base camp at the Tilenga industrial site housing the CPF was completed. At the CPF, works at the main pipe rack, LPG plant and gas turbine generator and the operation support base camp were nearing completion. The construction of the permanent and temporary workers' camps was complete.

Overall, three drilling rigs were in operation at the respective well pads. The civil works for the enabling infrastructure at the CPF (industrial area site preparation, access roads, well pads, camps, construction support bases) were completed.

Drilling at a total of nine (09) of the 31 well pads continued to be undertaken, with a total of 140 wells drilled. The overall drilling progress was at 31%, with a total well depth of 205 km of the targeted 586 km. The construction of the surface oil production facilities and piping works for the flow lines had commenced at some of the well pads. The Horizontal Directional Drilling (HDD) at the Nile River crossing (1.86 km) to transport oil from the north of the Nile to the CPF

¹ The Tilenga field, under the Total Energies operation, is located in Nwoya and Buliisa Districts.

² The Kingfisher field, under Chinese National Offshore Oil Company (CNOOC) operation, is located in Kikuube District.

³ Jobi-Rii, Gunya, Ngiri, Kasamene-Wahrindi, Kigogole-Ngara and Nsoga.

was also completed. Additionally, construction works for the feeder pipeline (96 km) for transportation of crude oil from the Tilenga CPF to the export hub in Hoima was ongoing, at 67%, with most of the line pipes delivered.



Ongoing civil and electromechanical works at the Tilenga CPF site in Buliisa

Kingfisher Development Area

One drilling rig was in operation in this development area. A total of 15 wells had been drilled at well pads 2 and 3 by the Chinese National Offshore Oil Corporation (CNOOC) which operates in the Kingfisher development area.

One of the key milestones achieved was the completion of the feeder pipeline from the CPF to the export hub in Kabaale Industrial Park (KIP). Additionally, over 19 km of flow line pipes were being laid from well pads 2 and 3. Significant progress was also observed at the CPF, with the construction of both on-spec and off-spec crude oil storage tanks completed. Erection works for the LPG storage and trucking facilities, in preparation for the anticipated LPG production, were underway.

Other critical infrastructure such as the substation, crude pig receivers, lake water treatment plant, fire suppression system, and the produced water treatment and injection facilities were in advanced stages.

Additionally, the RAP was fully implemented, including the construction of resettlement houses for affected communities in the Kingfisher area and along the feeder pipeline route from the CPF to the export hub in Hoima.



Completed crude oil storage tanks at Kingfisher CPF in Kikuube

3.2.4 Reviewing and update relevant policies, and harmonising conflicting laws and regulations

The intervention aims at harmonising conflicting policies, laws and regulations for effective regulation of oil and gas. The outputs for the FY 2024/25 were: Petroleum Act 2013 updated; National Petroleum Policy (NPP) development completed; NPP implementation plan and M&E framework developed; NPP Strategic Environment Assessment conducted; decommissioning and fiscal metering regulations developed; and ten standards and codes for upstream developed.

Performance

The performance was fair, at 65%. The development of the NPP M&E framework was concluded and the final drafts of the NPP and NPP implementation plan were developed, pending a certificate of financial implication from MoFPED.

The Strategic Environment Assessment (SEA) report was finalised. Preparations for stakeholder consultative engagements on the decommissioning, fiscal metering and allocation regulations were undertaken with the Uganda National Bureau of Standards (UNBS) and PAU.

Discussions to develop upstream codes and standards were ongoing in partnership with UNBS and PAU, and committee meetings to discuss ISO standards were also underway. Other related activities, such as the training of suppliers in various applicable codes, did not progress, pending finalisation of the upstream standards.

3.2.5 Establishing Quality, Health, Safety, Security and Environment governance and assurance framework

The intervention targets having a safe working environment in oil and gas by promoting Quality, Health, Safety, Security and Environment (QHSSE) guidelines.

The outputs for FY 2024/25 were: engagements on QHSSE held with stakeholders undertaken; QHSSE inspections for the production licenses conducted and QHSSE standards developed; trainings undertaken; social compliance assessments undertaken; and health and safety reports produced.



Performance

The performance was good, at 90%. PAU undertook inspection audits of the upstream operations. The targets for safety trainings and inspections of the different oil activities were met. Eleven (11) stakeholder engagements were conducted in the Tilenga and Kingfisher development areas, focusing on environment, health, safety and security management in the oil and gas sector. In addition, four (04) staff training sessions were held to support these initiatives.

There were still cases of non-compliance with the regulatory framework in some key health and safety aspects, highlighting the need for continued regulation. MEMD also reviewed the communication strategy of the Petroleum Department and developed a draft version of the revised strategy.

A detailed performance of the Upstream Sub-programme is highlighted in Table 3.4.

Table 3.4: Performance of the Upstream Sub-programme by 30th June 2025

Outputs Performance								Remarks
Intervention	Output	Financial Performance			Physical Performance			
		Annual Budget (US\$ bn)	% of Budget Received	% of Budget Spent	Annual Target	Cum. Achieved Quantity	Physical Performance (%)	
Undertake further exploration and ventures of the Albertine Graben	Undertake third licensing round and speculative survey promotion framework developed.	1.863	100	100	100	55.0	55	Fair performance
	Geological, geophysical and geochemical data acquisition in the frontier basins (Moroto-Kadam, Kyoga) and basin analysis assessment.	3.400	100	100	100	60.0	60	
	Regulation of petroleum activities conducted.	5.033	100	100	100	75.0	75	
	UNOC upstream operations undertaken	16.571	100	100	100	80.0	80	
Undertake construction and operationalisation of infrastructure projects to ease monitoring of upstream activities	Petroleum Geoscience Laboratory established.	2.000	100	100	100	55.0	55	Fair performance
	Data management hardware and software applications acquired and integrated. 50% completion of the Business Continuity and Disaster Recovery System.	6.777	100	100	100	62.0	62	



Outputs Performance								Remarks
Intervention	Output	Financial Performance			Physical Performance			
		Annual Budget (USh bn)	% of Budget Received	% of Budget Spent	Annual Target	Cum. Achieved Quantity	Physical Performance (%)	
	100% completion of modern and well-equipped store.							
Construct the Central Processing Facilities (CPFs) for Tilenga and Kingfisher Projects	Tilenga and Kingfisher RAP supervised and eight (08) field development reports reviewed.	0.719	100	100.0	35	20.0	57	Fair performance
	FDPs and work programmes reviewed. Upstream facility designs and drilling activities evaluated.	7.159	100	96.4	100	80.0	80	
Review and update relevant policies	National Petroleum Policy (NPP) development completed; NPP implementation plan and M&E framework developed; and NPP strategic environment assessment conducted. Decommissioning and fiscal metering regulations developed. Ten standards and codes for upstream developed.	2.340	100	98.6	100	65.0	65	Fair performance
Establish QHSSE governance and assurance framework	Monitoring undertaken; trainings undertaken; social compliance assessments undertaken; and health and safety reports produced.	4.193	100	100	100	90.0	90	Good Performance
	Total	50.054	100	99.2				
							67.9, Fair output performance	
Outcome Performance								
	Indicator		Annual Target	Achieved	Score	Indicator Performance (%)		



Outputs Performance								Remarks
Intervention	Output	Financial Performance			Physical Performance			
		Annual Budget (USh bn)	% of Budget Received	% of Budget Spent	Annual Target	Cum. Achieved Quantity	Physical Performance (%)	
	Number of exploration licences issued.	5	0	0	0	0.0		
	Level of compliance for the upstream activities.	100	95	95.0	95.0	95.0		
	Revenue from oil and gas.	265	208.1	78.5	78.5	78.5		
	Average Outcome Performance					57.8		
	Overall Sub-programme Performance					64.4		

Source: MEMD and PAU Q4 Reports, Field Findings

Challenges

- Funding constraints affected equipping of the National Petroleum Data Repository and the upstream petroleum laboratory for data analysis and the exploration activities in the various basins.
- The resumption of exploration activities in the Karamoja sub-region delayed due to insecurity, which hindered progress.

Recommendations

- MEMD and PAU should prioritise funding for essential IT infrastructure, software tools and exploration activities to enable better management and regulation of the oil and gas resources.
- MEMD should continue to engage local leadership and security agencies in the Karamoja sub-region to ensure timely completion of exploration activities.

Upstream Sub-Programme Conclusion

The overall sub-programme registered fair performance, at 64.4%, with both fair outcome and output performance. Oil and gas revenues increased, while the development of the third licensing strategy, intended to launch the third licensing round, faced delays; consequently, no new exploration licenses had been issued. Construction of CPFs reached 60%, with additional wells drilled, though behind schedule. A notable achievement was the completion of the feeder pipeline connecting the Kingfisher oilfield to the export hub in the industrial park. Petroleum exploration in the Kyoga basin achieved its target, while that in the Moroto-Kadam basin resumed after earlier suspensions caused by regional insecurity. However, limited funding allocation constrained progress in other critical areas. For example, the development of the national data repository and the petroleum upstream laboratory, remained minimal, with only one of the five components completed.

3.3 Midstream Sub-Programme

The Midstream Sub-programme consists of activities related to transportation, refining of oil and conversion of gas into finished products. The sub-programme also focuses on developing the technical and financial capacity of the Ugandan population in oil and gas as well as promoting investment. The sub-programme outcomes are: number of Ugandans employed in the oil and gas and related industries; level of midstream oil and gas compliance; percentage change in the amount of revenue from oil and gas; and number of contracts awarded to local companies. The planned monitored interventions for FY 2024/25 were:



- i. Undertake construction and operationalisation of midstream infrastructure projects in the Albertine region to ease the movement of goods.
- ii. Capitalise and/or license UNOC to execute its mandate as an investment arm of the Government in the oil and gas industry.
- iii. Operationalise the National Content Policy to enhance local content and national participation in oil and gas.
- iv. Establish an oil and gas incubation fund to promote local entrepreneurship and Small and Medium Enterprises (SMEs).
- v. Implement a strategy for value addition and marketing of goods and services for the oil and gas sector.

The overall Midstream Sub-programme performance was fair, at 65.9%. Performance of outcomes was good, while that of outputs was fair. On outcomes, the number of Ugandans directly employed in oil and gas increased from 13,067 in June 2024 to 17,203 by June 2025, but below the target of 20,000. The number of contracts awarded to local firms was 678, which was 65% of the target. The level of oil and gas compliance for midstream infrastructure operations also improved, but there were still cases of non-compliance with the established regulatory framework and health and safety standards.

At the output level, the performance of midstream infrastructure was fair. One of the highlights was the achievement of financial closure for EACOP in March 2025. The overall progress of EACOP was 64%, with the construction component at 33%. A total of 13 batches (1,300 km) had been delivered in Tanzania and coating of 58% of the pipes was completed. The Implementation Agreement for the development of the refinery was also signed with the private sector partner to pave the way for debt financing. The Government also continued disbursements of the equity funds to the refinery and EACOP. PAU continued registering talents and local firms with the potential to work in oil and gas. In that regard, the number of Ugandans directly employed in the oil and gas sector increased to 17,203, from 13,067 in June 2025. This increase was due to the start of the development phase of oil and gas. However, the progress of the development of the Local Content Fund and a value addition and marketing strategy to support local SMEs was poor. The draft Bill for the Local Content Fund was pending the Attorney General's approval.

Performance of the Interventions

The overall intervention performance was fair, at 57.2%. Five interventions were monitored, with one showing good performance, two being fair, while two were poor. Good performance was observed in the development of national content, whereas the construction of midstream infrastructure outputs, such as EACOP and Kabalega Industrial Park, showed fair performance. On the other hand, poor performance was noted in the establishment of a Local Content Fund to fully support local firms and also in enhancing capacity in local goods and services in oil and gas (**Table 3.5**).

**Table 3.5: Performance of interventions in the Midstream Sub-programme**

Intervention	Performance Rating (%)	Remarks
Undertake construction and operationalization of infrastructure projects in the Albertine region to ease the movement of goods.	56.5	Overall EACOP progress was at 64%. EACOP RAP was nearly complete, while the products pipeline RAP was at 78%.
Capitalise and/or license UNOC to execute its mandate as an investment arm of Government in the oil and gas industry.	69	The EACOP financial closure was achieved in March 2025. The Implementation Agreement with Alpha MBM was signed. Cumulative refinery equity disbursements stood at US\$ 287.69 billion. The development of KIP common infrastructure continued.
Operationalise the National Content Policy to enhance local content and national participation in oil and gas.	85	918 Ugandan companies and 1,175 Ugandans were registered on the NSD and NOGTR, respectively. Directly employed Ugandans stood at 17,203, a 32% increase from previous financial year.
Establish an oil and gas incubation fund to promote local entrepreneurship and SMEs.	37	The principles for the enactment of the Local Content Development Fund were approved and the draft Bill was pending the Attorney General's approval.
Implement a strategy for value addition and marketing of goods and services that will be demanded by the oil and gas sector.	30	Stakeholder engagements on the strategy were held. The procurement of a consultant for the strategy was at bid invitation.

Source: Author's Compilation

3.3.1 Undertaking construction, operationalisation of infrastructure projects in the Albertine region to ease the movement of goods

The intervention aims at the establishment of midstream petroleum infrastructure, including the oil refinery, products pipeline and EACOP for the refining and transportation of oil during production.

The planned outputs for the FY 2024/25 were:

- Pipeline development: Construction of the EACOP pipeline progressed, concluding the acquisition of EACOP, multiproduct pipeline corridors and storage terminal through resettlement activities.
- Refinery Final Investment Decision (FID) achieved, Refinery Commercial Agreements commencing, and construction commenced.
- Feasibility studies on the petrochemical industry and natural gas pipeline undertaken.
- Development of Hoima EACOP offices.

Performance

The intervention performance was fair, at 56.5%. One of the key highlights was securing EACOP debt financing through a syndicate of financial institutions. The EACOP construction works progressed and implementation of the Resettlement Action Plan (RAP) for the pipelines and refinery were at their tail end. The Implementation Agreement was signed with the Refinery Private Sector Partner, Alpha MBM during the financial year. However, works were yet to commence, pending the conclusion of financing closure. The progress for the various outputs was as below:

a) Pipeline Development

MEMD and the Joint Venture Partners were undertaking development of EACOP and the refined product pipelines. EACOP is 1,443 km long, and will transport crude oil from the export hub in Kabaale, Hoima District, in Uganda to Tanga Port in Tanzania, with 80% of the pipeline located in Tanzania. The multi-product pipeline, on the other hand, is 211 km long and will evacuate refined products from the refinery in Hoima to a storage terminal at Namwabula, Mpigi District.

i) East African Crude Oil Pipeline (EACOP)

The EACOP Project spans 1,443 km from Hoima in Uganda to Tanga in Tanzania, with Uganda hosting 296 km of the pipeline. The project also comprises six pumping stations along its length, with two of these stations located in Uganda. The overall progress of EACOP was at 64%, with engineering designs at 94.3%, procurement at 83.8%, and construction works at 33%. The construction of the Above Ground Installations (AGI), a marine storage terminal, solarisation farms and access routes at Tanga, Tanzania, was completed. Manufacturing of the pipeline was also underway in China, and a total of 13 batches (1,300 km) of line pipes were delivered in Dar es Salaam. Coating of the line pipes with polyurethane foam (PUF) for thermal insulation



Ongoing pipe laying work on the EACOP Project

commenced in October 2024 at the plant in Tabora, Tanzania. Cumulatively, a total of 832 km of line pipes were coated, and 755 km of these had already been dispatched to the sites. Since welding commenced in September 2024, a total of 500 km of pipe has been welded, 200 km of pipe field coated with liquid epoxy, and 54 km of pipe successfully lowered into the ground across 13 work spreads.



Pumping Stations



Ongoing civil works at EACOP Pumping Station (PS1) in Kabalega Industrial Park, Hoima District

There are two planned pumped stations in Uganda, out of the total number of six for the entire project. The progress of Pumping Station 1 (PS1) located at the Kabalega industrial site was at 62%, with civil and mechanical installation ongoing at the site. Works Pumping Station 2 (PS2) had achieved 55% overall completion, reflecting notable advancements across key construction components. A total of 1,680 cubic metres of main concrete had been completed, marking a critical milestone in establishing the foundations and structural elements of the station. In

addition, approximately 486 metres of underground piping were successfully installed, supporting the development of core pipeline systems. The National Water and Sewerage Corporation (NWSC) also commenced laying the water supply extension to PS2, with a capacity to deliver up to 120,000 litres of water daily to facilitate ongoing construction activities.

Product Pipeline

The Front End Engineering Design (FEED) studies for the products pipeline were completed, and the land for the storage facilities was fully acquired. The Government was in the process of securing financing for the pipeline construction.

ii) Acquisition of pipeline corridors

The progress of cash compensation for the 30 m corridor for the EACOP pipeline was nearly complete at 99%, and land titling of the acquired land was ongoing. The mop-up process of the remaining 1% was being undertaken, with some cases of family disagreements; thus, there is a need to deposit in escrow accounts while awaiting the dispute resolution. Additionally, all 177 resettlement houses for the vulnerable were completed and handed over to the Project-Affected Persons (PAPs).

The products pipeline RAP showed modest progress to 78%, from 76% in the previous financial year. A total of 3,461, out of 4,337 PAPs, had signed compensation agreements. However, the construction of the resettlement houses had not begun and was behind schedule.

b) Refinery Development

The Refinery Project Framework Agreement expired on 30th June 2023, and the project progressed as a public sector-led project. The Government signed an Implementation Agreement (IA) with Alpha MBM to pave the way for financing, detailed engineering, and construction commencement. Due diligence by the investor was undertaken, and several technical and high-level engagements on the conclusion of the key project documents were held.



c) Development of Natural Gas Pipeline and Petrochemical Industry

Following the Bilateral Agreement between the Governments of Uganda and Tanzania on the development of the natural gas pipeline and joint procurement rules, the technical evaluations were completed, and the report was approved. However, the procurement of a consultant for the pipeline feasibility study was slow, with the draft contract finalised but pending the Solicitor General's approval. The natural gas pipeline from Tanzania to Uganda is expected to support iron ore mineral processing in the Southwestern Region, underscoring the need to fast-track the feasibility study. Similarly, the procurement of a consultant to undertake feasibility studies for the petrochemical industry and the integrated complex for fertilisers at the Kabalega Industrial Park also registered poor progress and remained incomplete at the time of monitoring.

d) Development of Hoima EACOP Offices

In a bid to decentralise midstream functions, land for the Hoima Regional Office was acquired in the previous FY 2023/24. The detailed designs and Bill of Quantities (BoQ) for the offices were finalised. The next stage will be the procurement of a contractor to undertake construction works.

3.3.2 Capitalising and/or licensing Uganda National Oil Company (UNOC) to execute its mandate as an investment arm of the Government in the oil and gas industry

This intervention was aimed at providing equity financing to UNOC to enable it to execute its mandate as an investment arm of the Government in the oil and gas industry through: state participation in production licenses; proposing new petroleum exploration ventures; developing, owning and operating the oil refinery, oil pipelines, storage terminals, and other related facilities.

The planned annual output for FY 2024/25 was the contribution of UNOC's equity to the oil refinery as part of its shareholding to enable carrying out operations, including undertaking of oil refinery pre-FID activities and other supporting activities in the oil and gas sector, and development of Kabalega Industrial Park (KIP).

Performance

The performance was fair, at 69%. One of the key achievements was the conclusion of financial closure for the debt financing of EACOP in March 2025. The 40% EACOP equity contribution by the partners was also completed. However, cash calls worth USD 68 million were made available by the GoU and USD 45 million was paid by UNOC between October and December 2024 due to delays in achieving financial closure.

The Government agreed to a 100% equity financing model, with 40% from the GoU anticipated between USD 1.2 billion and USD 1.6 billion. The second phase of the refinery equity disbursement, worth USh 140 billion, was released during FY 2024/25, bringing the cumulative equity disbursements to USh 287.69 billion since FY 2023/24.

The Implementation Agreement (IA) was also signed with the refinery private sector investor, Alpha MBM, to pave the way for financial closure of the 60% equity financing (USD 2.8 billion) and eventual construction. The negotiations for the Crude Supply Agreement between UNOC and its upstream partners (Total Energies and CNOOC) were ongoing, and the Shareholders Agreement negotiations with the partner were also anticipated to begin at the start of FY 2025/26.

Under the development of the Kabaale Industrial Park (KIP) common infrastructure, the site for the Kabaale power substation was handed over to the Uganda Electricity Transmission Company



Limited (UETCL) in August 2024. By December 2024, levelling works were complete and foundation excavations were underway. The feasibility studies and design for several other infrastructures had also progressed. For example, the detailed design for power reticulation, solar power and geotechnical testing for the finalised road alignments were completed.

The designs for the development of the KIP common infrastructure for access and arterial roads were at 85%, and construction of the KIP site office had not begun as planned. UNOC was also in the process of procuring a consultant to undertake feasibility studies for a petrochemical industry and an integrated fertiliser complex. However, minimal progress had been made since June 2024.

3.3.3 Operationalising the National Content Policy to enhance local content and national participation in oil and gas

The intervention aims at training and registering local SMEs in oil and gas skills. This is to enable them to successfully implement oil and gas contracts to enhance their participation in tendering and delivery of contracts. The planned outputs for FY 2024/25 were:

- i. 800 local companies registered on the National Supplier Database (NSD).
- ii. 800 talents registered on the National Oil and Gas Talent Register (NOGTR) database.
- iii. 18 supplier development workshops conducted.
- iv. 500 enterprises sensitised about bid evaluation.

Performance

The intervention showed good performance, at 85%. Training of the local population in oil and gas and the provision of employment opportunities in the sector continued.

To promote national content, PAU embarked on a process of registering local companies on the National Supplier Database (NSD). The NSD, established in 2017, captures companies with the interest and readiness to supply goods and services in the sector and regulates procurement of goods and services while ensuring prioritisation of local firms.

A total of 918 Ugandan companies were qualified and registered on the NSD. More 321 contracts were awarded, with 72.6% (233) of these given to Ugandan firms, enabling them to benefit from 75% of the total contract value.

To boost local talents, PAU trained and registered talents that can work in oil and gas on the National Oil and Gas Talent Register (NOGTR). The NOGTR captures the talent of individuals who can potentially work in the oil and gas sector, and a total of 1,175 Ugandans (837 males and 338 females) were registered. To boost participation, a total of 20 sensitisation engagements on the NSD and NOGTR were conducted, and 29 supplier development workshops held. Overall, 56,770 Ugandans (17,203 direct and 39,567 indirectly) were employed in the sector. There was growth in direct employment from 13,067 in June 2024 to 17,203 by June 2025, translating into a 32% increase. This indicates the impact of the commencement of the oil and gas development phase on the level of employment.

3.3.4 Establishing an oil and gas incubation fund to promote local entrepreneurship and Small and Medium Enterprises (SMEs)

There has been an increase in the number of local firms ready to participate in oil and gas over the years. However, their level of participation by contract value remains minimal since the sector is capital-intensive and they cannot effectively compete with foreign firms due to the lack of capital, limited by the high interest rates charged by commercial banks. This intervention,

therefore, aims at establishing and operationalising a Local Content Fund to enhance their financial capacity for more participation in the sector. The annual output for FY 2024/25 was the development of the Local Content Development Fund Act.

Performance

The performance was poor, at 37%. The principles for the enactment of the Local Content Development Fund were approved by the Cabinet Secretariat. The draft Bill was pending the Attorney General's approval and then presentation to the First Parliamentary Council for approval.

The Local Content Development Fund is expected to be financed through a 1% levy on awarded goods and services contracts. Held at the Uganda Development Bank (UDB), the fund aims to boost Ugandan firm participation in the oil and gas sector, particularly during the current ongoing development and later operational phases, building on prior training in oil and gas contract management.

3.3.5 Implementing a strategy for value addition and marketing of goods and services for the oil and gas sector

This intervention aims at adding value to the goods supplied, which, in turn, is expected to enhance the financial benefits to the business communities and ensure the sustainability of participation in oil and gas. The output for FY 2024/25 was value addition, and a marketing strategy for oil and gas was developed.

Performance

The performance of the development of the strategy was poor, at 30%. Stakeholder engagements on the strategy were held. MEMD invited bids for the procurement of consultancy services for the development of the strategy, but no response to the invitation had been realised despite the availability. Thus, the zero draft for the value addition and marketing strategy for goods and services was not developed.

A detailed performance of the Midstream Sub-programme is highlighted in Table 3.6.

Table 3.6: Performance of the Midstream Sub-programme by 30th June 2025

Intervention	Output	Financial Performance			Physical Performance			Remarks
		Annual Budget (US\$ bn)	% of Budget Received	% of Budget Spent	Annual Target	Cum. Achieved Quantity	Physical Performance Score (%)	
Undertake the construction and operationalisation of infrastructure projects in the Albertine region to ease the movement of goods.	Supervision of RAP	1.00	98.6	100	24	8.0	34.3	Fair performance
	EACOP and products pipeline RAPs completed. Refinery Commercial Agreements commenced. Feasibility studies on the petrochemical industry undertaken.	13.3	100.0	97.8	3	2.1	68.3	



Intervention	Output	Financial Performance			Physical Performance			Remarks
		Annual Budget (US\$ bn)	% of Budget Received	% of Budget Spent	Annual Target	Cum. Achieved Quantity	Physical Performance Score (%)	
	A feasibility study on the natural gas pipeline undertaken.							
	Refinery FID achieved and construction commenced.	519.73	26.9	100.0	100	18.0	66.8	
Capitalise UNOC to execute its mandate.	UNOC midstream operations	16.57	100.0	100.0	100	69.0	69.0	Fair performance
Operationalise the National Content Policy.	800 Ugandans registered on the NOGTR and 800 locals on the NSD. 200 Ugandan firms benefitted from oil and gas 500 local firms trained.	6.67	100.0	95.0	100	85.0	85.0	Good performance
Establish an oil and gas incubation fund.	Local Content Development Fund Act developed.	0.86	100.0	100.0	100	37.0	37.0	Poor performance
Implement a strategy for value addition and marketing of goods and services.	Value addition and a marketing strategy for oil and gas developed.	0.21	100.0	100.0	100	30.0	30.0	Poor performance
	Total	724.90	47.6	99.8				
Average Output Performance							57.2, Fair output performance	
	Indicator		Annual Target	Achieved	Score	Indicator Performance (%)		
	Level of oil and gas compliance for midstream infrastructure operations		100	95	95.0	95.0		
	Number of contracts awarded to local firms		1,035	678	65.5	65.5		
	Number of Ugandans employed in oil and gas		20,000	17,203	86.0	86.0		
	Average Outcome Performance						82.2	
	Overall Sub-programme Performance						65.9	

Source: MEMD, UNOC and PAU Q4 Reports, Field Findings

Challenges

- i. Delay in reaching timely financial closure by both the GoU and the Joint Venture Partners for the refinery and EACOP slowed down works for most parts of the financial year thus affecting the timeline for the production of the first oil.
- ii. The low financial capacity of the local firms hindered full participation in oil and gas.

Recommendations

- i. The Government and Joint Venture Partners should fast-track construction of the EACOP, given that the financial closure was achieved and also finalised agreement for oil refinery development.
- ii. MEMD needs to fast-track the development of the value-addition strategy for goods and services to improve the financial benefits of the local firms that take part in oil and gas.

Midstream Sub-Programme Conclusion

The overall performance of the Midstream Sub-programme was fair, at 65.9%, with good outcomes and fair output performances. The number of Ugandans employed in the sector increased by 32%. The financial closure of the EACOP was achieved in March 2025, and overall progress was at 64%, with 90% of line pipes delivered and 58% coated. The Implementation Agreement for the refinery was also signed to pave the way for financial closure processes. As midstream infrastructure works began, Ugandan participation in the oil and gas sector increased, and during the financial year, local firms accounted for 72.6% by value of contracts awarded; however, the Local Content Fund to support their financial capacity was yet to be established.

3.4 Downstream Sub-programme

The Downstream Sub-programme deals with the distribution, marketing and sale of refined petroleum products within the country. The sub-programme outcomes are: an adequate stock of petroleum products on the market; and level of compliance with petroleum quality. The three planned interventions were:

- i. Manage and restock Jinja Storage Terminal (JST).
- ii. Develop strategic regional storage terminals for petroleum products.
- iii. Develop standards for storage infrastructure and other facilities.
- iv. Invest in LPG infrastructure.

The overall Downstream Sub-programme performance was good, at 78.7%. The performance of outcomes was good, with a level of compliance at 99.4% and an average number of days of stock levels in the country at 10 days. The outputs performed fairly with the promotion of LPG usage, recording good performance, with a total of 14,136 LPG cylinder kits distributed to various districts countrywide. The objective of operating the Jinja Storage Terminal (JST) as a strategic reserve was not achieved, as it continued to function as a trading facility. Additionally, 81% of targeted retail outlets were monitored, and enforcement actions were carried out in 39% of those monitored.

Performance of the Interventions

The overall intervention output performance was fair, at 67.3% (Table 3.7). Of the four monitored interventions, two showed good performance while two were fair. Good output performance was in the regulation and monitoring of downstream trading activities and the promotion of LPG usage through dissemination of cylinder kits. On the other hand, fair performance was noted in the restocking of the JST and the development of the Kampala Storage Terminal (KST).

**Table 3.7: Performance of interventions under the Downstream Sub-programme**

Intervention	Performance Rating (%)	Remarks
Manage and restock Jinja Storage Terminal.	65.4	UNOC imported 2.67 billion litres of petroleum products with a monthly average of 220 million litres.
Invest in LPG infrastructure.	80	A total of 14,136 cylinder kits were disseminated in various districts countrywide.
Develop standards for storage infrastructure and other facilities.	70.5	81% of fuel outlets were monitored and NTR collected was US\$ 606 million.
Develop strategic regional storage terminals for petroleum products.	53.1	The KST Front End Engineering Design (FEED) was completed and 70 retail outlets were mapped on the GIS.

Source: Author's Compilation

3.4.1 Managing and restocking Jinja Storage Terminal

The intervention is aimed at overseeing the rehabilitation, operation and management of the Jinja Storage Terminal to oil industry standards to ensure the security of petroleum supply. The terminal has a capacity of 30 million⁴ litres and is managed by UNOC. The planned outputs for FY 2024/25 were:

- i. Managing the operations and scaling up trading of the Jinja Storage Terminal (JST).
- ii. Construction of the oil jetty and pipeline connecting JST to Lake Victoria.

Performance

The performance was fair, at 65.4%. Following the enactment of the Petroleum Supply Act, 2023, aimed at giving UNOC the sole mandate to import petroleum products for the country, UNOC continued importing fuel and restocking the Jinja Storage Terminal. UNOC, in partnership with its supplier Vitol Bahrain, imported 2.67 billion litres of petroleum products, with a monthly average of 220 million litres, to meet the country's oil demand.

UNOC also continued to restock the Jinja Storage Terminal, but the stock levels were still below the storage capacity (30 million litres). This was due to low allocation for restocking, and the objective of the JST to act as a strategic reserve was not being met since it was more of a trading rather than a reserve facility.

To ensure security of supply and scale up trading, UNOC concluded feasibility studies for the transportation of petroleum products through the development of an oil jetty pipeline from the terminal to Lake Victoria, with pipeline designs also completed. However, UNOC was yet to secure a funding partner to support the oil jetty development in order to commence construction works. Other key equipment acquired included the pressure vacuum vent for the Premium Motor Spirit (PMS) tank, the fire pump, Automatic Tank Gauges (ATGs), security cable seals and the weighbridge, among others.

3.4.2 Investing in Liquefied Petroleum Gas (LPG)

The intervention aims at promoting the usage of Liquefied Petroleum Gas (LPG) as an alternative source of energy to reduce reliance on biomass. MEMD launched an initiative to procure promotional LPG cylinder kits, which are to be distributed free of charge so that the cost of acquisition can be subsidised for new users.

⁴ 20 million diesel and 10 million petrol.



The planned outputs under this intervention for FY 2024/25 were: 17,295 cylinder kits disseminated; LPG promotional campaigns and communication strategy implemented; and studies for land in Hoima for LPG storage terminal conducted.

Performance

The performance was good, at 80%. The promotion and dissemination of the kits was also rolled out to various districts in the country. These included: Mbarara, Gulu, Mubende, Fort Portal, Masaka, Kumi, Jinja and Nebbi. Furthermore, 12 radio talk shows were conducted as part of the promotional campaigns. A total of 14,136 cylinder kits (82% of the target) were manufactured and disseminated to various households. The land for the LPG terminal in Mukono was also fenced off. However, the studies for the LPG land in Hoima were not undertaken.

3.4.3 Development of standards for storage infrastructure and other facilities

The intervention aims at regulating the quality of petroleum products on the market through monitoring, enforcement and development of standards for regulation. This is implemented by the Petroleum Supply Department in MEMD. The annual planned outputs were: downstream operations monitored and enforcement undertaken; petroleum standards developed; and lake transport of refined petroleum products regulations in place.

Performance

The performance was good, at 70.5%. Monitoring for quality and marker concentration was undertaken in 81% of the retail stations (2,078). The compliance level was at 98.9%. Enforcement was undertaken in 39% of the petroleum retail outlets (822) that were non-compliant, highlighting the need for continued monitoring.

A total of US\$ 606 million, representing 60% of the annual target, was collected as Non-Tax Revenue (NTR) from licensing activities, reflecting a modest increase from US\$ 535 million realised in the previous financial year. To better regulate the downstream trading activities, 16 standards and codes of practice were developed in partnership with the UNBS.

The Ministry of Works and Transport (MoWT) also conducted part of the stakeholder consultations on lake transport regulations; however, the regulations were not finalised due to funding constraints within the lead agency, MoWT.

3.4.4 Developing strategic regional storage terminals for petroleum products

The intervention aims at developing regional storage terminals to ensure an adequate stock of petroleum supply. The planned outputs for FY 2024/25 were: designs for Kampala Storage Terminal (KST) concluded; designs for LPG Land Infrastructure acquired; and GIS mapping of petroleum outlets.

Performance

The performance was fair, at 53.1%. The KST Front End Engineering Design (FEED) was completed. The feasibility studies and engineering designs progressed, with site topographical studies, geotechnical technical investigation and economic studies completed. The development and management of the Kampala Storage Terminal (KST) was also incorporated into the Petroleum Product Supply Agreement signed with Vitol Bahrain. UNOC was still in the process of securing financing for the development of the KST. On the other hand, the finalisation of the LPG infrastructure designs was deferred, pending consultations with partner states to secure



regional alignment. A total of 70 retail outlets were also mapped on the GIS to improve planning and regulation.

The performance of the Downstream Sub-programme is summarised in Table 3.8.

Table 3.8: Performance of the Downstream Sub-programme as at 30th June 2025

Outputs Performance								Remarks
Intervention	Output	Financial Performance			Physical Performance			
		Annual Budget (US\$ bn)	% of Budget Received	% of Budget Spent	Annual Target	Cum. Achieved Quantity	Physical Performance Score (%)	
Restock and manage JST.	Bulk Trading of petroleum products scaled up	3.682	100	100	100	65	65.4	Fair performance
Invest in LPG.	17,295 Cylinder Kits procured and disseminated LPG land fenced	10.260	100	100	100	80	80.0	Good performance
Development of standards for storage infrastructure and other facilities.	1200 downstream operations monitored 600 petroleum retail outlets enforced for compliance 20 petroleum standards developed 80% fuel stations monitored for quality	1.835	100	100	100	71	70.5	Good performance
Develop strategic regional storage terminals for petroleum products.	Consultancy services for master plan for Lake Transport undertaken Petroleum supply Lake Transport regulations in place Land for regional depots acquired	0.475	97.9	100	100	52	53.1	Fair performance
	Total	16.252	99.9	100.0				
Average Output Performance							67.3	Fair
Outcome Performance								
	Indicator		Annual Target	Achieved		Score	Indicator Performance (%)	
	Number of days of stock levels in the country		10	10		100.0	100	
	Level of compliance of refined petroleum products		99%	99.4%		100.4	100	
	Average Outcome Performance						100	
	Overall Sub-programme Performance						78.7	



Source: MEMD and UNOC Q2 Reports, Field Findings

Challenges

- i. UNOC is not able to fully restock the fuel reserves in Jinja to the recommended strategic levels, which is a risk to the country's energy security.
- ii. Delay in securing financing for additional storage terminals is constraining the downstream sub-programme's preparedness for the oil production phase.

Recommendations

- i. MEMD and MoFPED should prioritise funding to the downstream sub-programme and the development of the Kampala Storage Terminal to ensure adequate stock levels of fuel.
- ii. UNOC should hasten the conclusion of the search of a partner to scale up trading at the Jinja Storage Terminal (JST).
- iii. MoFPED and UNOC should fast-track securing financing for the development of storage terminals.

Downstream Sub-Programme Conclusion

The overall performance of the downstream sub-programme was good, at 78.7%. The sub-programme registered good outcomes and fair output performances. The distribution of household LPG cylinder kits resumed, with 14,136 cylinder kits distributed. Restocking of the Jinja Storage Terminal continued but, due to limited funding, the facility functioned more as a trading hub than a strategic reserve. MEMD also continued monitoring and enforcement of petroleum quality at retail outlets. Market compliance stood at 99.4%, though some non-compliance issues persisted, highlighting the need for enhanced surveillance and enforcement of quality standards.



CHAPTER 4: CONCLUSION AND RECOMMENDATION

4.1 Conclusion

The overall petroleum programme performance was fair, at 69.6%. In the Upstream Sub-programme, significant progress was made towards first oil, with 155 of the targeted 189 development wells (82%) drilled. Construction of the Central Processing Facility (CPF) in Tilenga was at 60% progress, while the Kingfisher CPF works had reached 90% completion, but remained behind schedule. The exploration work under the petroleum programme continued, with new activities in the Kyoga basin and resumption in Moroto-Kadam, although the third licensing round for newly explored areas in the Albertine Graben and Moroto-Kadam was delayed pending finalisation of the licensing strategy.

Midstream development recorded mixed performance. A key milestone was financial closure of the EACOP pipeline in March 2025, backed by a syndicate of financial institutions. Construction progressed from 13% in June 2024 to 33% by the time of monitoring, supported by the delivery of 1,300 km of line pipes, of which 832 km were coated with polyurethane foam (PUF). The Implementation Agreement for the planned 60,000 barrels-per-day refinery was signed with private investor Alpha MBM, paving the way for financing and development. However, resettlement activities and financial closure for the products pipeline lagged, slowing overall progress.

The Downstream Sub-programme performed well. UNOC continued restocking the Jinja Storage Terminal to secure fuel supplies and initiated partnerships to expand bulk trading and develop a new storage terminal in Kampala. These measures are essential in preparing for oil production. Additionally, 14,136 LPG kits (82% of the annual target) were distributed to promote clean cooking and LPG adoption in anticipation of future supply from Tilenga and Kingfisher.

Overall, while the Upstream and Midstream Sub-programmes made progress, both remain behind schedule, particularly on critical infrastructure for first oil. By contrast, downstream interventions performed strongly, laying the groundwork for increased petroleum product use. Going forward, the Government and Joint Venture Partners should fast-track completion of midstream infrastructure, especially EACOP and the refinery, while prioritising investment in additional strategic storage facilities and scaling up LPG promotion to strengthen energy security and maximise oil sector benefits.

4.2 Recommendations

- i. The Joint Venture Partners should allocate more resources to the ongoing key projects and prevent further disruptions to the ongoing EACOP construction due to funding constraints.
- ii. MEMD and the Joint Venture Partners should actively engage the project host communities to counter the negative publicity surrounding the project and amicably resolve pending resettlement issues.



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ANNEX

Annex 1: Monitored Interventions, Outputs and Implementing MDAs for FY 2024/25

Sub-Programme	Intervention	Outputs	Implementing MDA
Upstream	Undertake further exploration and ventures of the Albertine Graben.	New exploration activities undertaken in the Albertine region, Moroto-Kadam and Kyoga basins.	MEMD, UNOC
		The third licensing round undertaken.	MEMD
		Specialised equipment and maintain specialised software packages acquired.	PAU, MEMD
		Upstream activities regulated.	PAU
	Undertake construction and operationalisation of infrastructure projects.	Data Repository Centre for the Directorate of Petroleum (DP) and PAU established.	MEMD, PAU
		Integrated data management system developed.	MEMD
	Construct the Central Processing Facilities (CPFs) for Tilenga and Kingfisher Projects.	Kingfisher and Tilenga Projects developed.	MEMD
		Tilenga and Kingfisher RAP and production activities undertaken.	PAU
	Review and update relevant policies; and fast-track harmonisation of conflicting laws and regulations.	Decommissioning and fiscal metres regulations developed; the Petroleum Act 2013 updated; and National Petroleum Policy (NPP) Strategic Environment Assessment conducted.	MEMD
	Establish Quality, Health, Safety, Security and Environment (QHSSE) governance and assurance framework.	QHSSE systems and standards developed and implemented. QHSSE engagements held with stakeholders and inspections for the production licences conducted.	MEMD, PAU
Midstream	Undertake construction and operationalisation of infrastructure projects in the Albertine region to ease the movement of goods.	Products pipeline and storage terminal RAP implemented. Refinery post-FEED conducted. Petrochemical industry development undertaken.	MEMD
		Refinery, products pipeline and Kyakaboga water pipe system RAPs completed.	MEMD, UNOC
		Construction of EACOP and Oil refinery	UNOC
	Capitalise UNOC to execute its mandate as an investment arm of the Government in the oil and gas industry.	Refinery equity contribution made and Kabaale industrial infrastructure developed.	MFPEd
		UNOC midstream operations undertaken.	UNOC
	Operationalise the National Content Policy to enhance local content and national participation in oil and gas.	National Content Policy implemented.	MEMD, PAU
	Establish an oil and gas incubation fund to promote local entrepreneurship and SMEs.	Local Content Development Fund Act developed.	MEMD
	Implement a strategy for value addition and marketing of goods and services for the oil and gas sector.	Value addition and marketing strategy and plan for the oil and gas sector developed.	MEMD
Downstream	Restock and manage Jinja Storage Terminal (JST).	Bulk trading of petroleum products scaled up.	UNOC
	Invest in Liquefied Petroleum Gas (LPG) infrastructure.	Dissemination of LPG cylinder kits.	MEMD



Sub-Programme	Intervention	Outputs	Implementing MDA
	Develop strategic regional storage terminals for petroleum products.	Consultancy services for master plan for lake transport undertaken. Petroleum supply lake transport regulations in place.	MEMD
	Develop standards for storage infrastructure and other facilities.	Downstream operations monitored. Petroleum standards developed. Fuel stations monitored for quality.	MEMD

Source: Author's Compilation



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