



Economic Commission for Africa



Economic Policy Research Center

Pro-Poor Growth Strategies in Africa

**Tourism: A Viable Option for
Pro-Poor Growth in Africa?**

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Note of the Author

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Introduction

Evidence shows that growth alone is not sufficient to stop the marginalization of Africa and to improve the standards of living of its inhabitants. What is necessary for poverty reduction is a strategy of pro-poor growth in which economic growth is combined with reductions in inequality.

From the analysis of the tourism industry and through the evidence shown by case studies conducted by various institutions in the last few years, it seems clear that tourism has great potentialities for poverty reduction purposes.

As an industry, it is labor-intensive; it is less vulnerable than traditional sectors; it is non-cyclical; it has a catalytic effect on the rest of the economy; it has lower barriers to entry and creates better and more gender concerned jobs than most sectors. More important: being built on natural and cultural assets and consumed onsite, it can reach the poor in rural areas where poverty is harsher. Nevertheless, tourism development is fraught with problems, and the constraints that limit its progress in Africa are evident and not easy to overcome.

To fully assess the potentialities of tourism for pro-poor growth, it is necessary to go beyond the economic benefits and the socio-cultural impacts of the industry in destination countries, and focus also on people's livelihoods, the issues of distribution, and how poverty concerns could be embedded into mainstream tourism policy making.

This paper aims at presenting a review of the major works undertaken on tourism and poverty in Africa, providing some critiques and suggestions for future progress, in order to sensitize the development community and African governments on the potentialities that tourism may offer for pro-poor growth, if correctly channeled in the right direction.

Some data on tourism in developing countries, and specifically in Africa, will be presented to provide a background on the sector in poor countries. Then, the paper will quickly switch to the core of its objectives: determine if tourism is a viable option for pro-poor growth in Africa.

First, an analysis of the industry will highlight its potentialities for poverty reduction; secondly, some of the major documents and initiatives concerning tourism policy and poverty will be listed, with a more detailed study on selected African countries. An own study on African PRSPs offers a proof of the scarce inclusion of tourism in national poverty plans.

A large section is dedicated to pro-poor tourism, a new approach that aims at unlocking opportunities for the poor through tourism development. Various case studies of PPT in Africa are then taken into consideration to supply some interesting data on the applicability of poverty concerns in tourism.

Besides, a tentative way forward to strengthen the binomial tourism & poverty is depicted using the framework offered by NEPAD. Finally, some conclusions are drawn.

Overview

Tourism in developing countries

Tourism can make a substantial contribution to the economic and social development of many developing countries. Tab. 1 provides some data on tourism in LDCs.

Table 1
Tourism in Least Developed Countries

International Tourist Arrivals in LDCs ('000)	1990 2,921	2000 5,106	Increase % 74.8
Average value per tourist of tourist expenditure (US\$) (World Average US\$670)	1990 350	2000 508	Increase % 45.3%
Travel¹ as share of total trade in services and total goods and services	As % of Services 70.6		As % of Goods & Services 5.3
Merchandise exports in LDCs	Rank Fuels: 1 Manufactures: 2 Tourism: 3	Total value in US\$ million Fuels: 2316 Manufactures: 720 Tourism: 335	Tourism and Merchandise Exports Growth '90-'00 (%) Fuels: 1,444 Manufactures: 217 Tourism: 47
Note: Unless where indicated, all data refer to 2000 Data: WTO/OMT from World Bank Indicators. UNECA elaboration.			

Tourism is significant – i.e. more than 2% of GDP or 5% of export (DFID) – in 11 of the 12 poorest countries, in almost half the low-income countries and almost all the lower-middle income countries.

International tourist arrivals in the developing world account for nearly one third of the global total. Although the share of LDCs in the global tourism market is less than 1%, the

¹ Figures relate to the credit component of the Travel item in the Balance of Payments as percentage of items on “Services” and “Goods and Services” in the countries of reference.

growth in the 90s has been more rapid than in the rest of the world (Christie and Crompton, 2001).

In a study conducted by WTO/OMT and UNCTAD in 2001, among the 28 LDCs for which it was feasible and adequate to calculate tourism as a proportion of GDP, in 16 countries tourism accounted for more than 2% of GDP, and in 8 of those 16 for more than 5% of GDP, up to the 57.7% of Maldives. 22 out of 28 saw significant increases in tourism revenues in the 90s, and 15 of them saw the revenues in current dollar increase by more than 100% in that decade. Sierra Leone, Guinea, Equatorial Guinea, Burundi, Senegal, and Togo recorded a decrease in tourist revenues, probably due to the political instability in those areas.

If petroleum exports are excluded, tourism is the first source of foreign exchange earnings in the 49 LDCs, accounting for 16.2% (1998) of their total non-oil export receipts, 39% more than cotton and 82% more than textile. In over one third of LDCs tourism ranks among the top three sources of foreign exchange earnings, and it is the first source in 7 of them.

Tourism significantly contributed for the graduation from LDC status of Botswana, being a major factor for income growth, economic diversification and social status improvements, and it is the leading sector in Vanuatu, Samoa, Maldives and Cape Verde, all considered for graduation since 1994 (Encontre, 2001).

Looking at the data of tourism market in Africa (Tab.2), the first consideration that comes to mind is related to the great potentialities, to a good extent untapped, that this industry can offer for the socio-economic development of the continent.

Table 2
Tourism In Africa

International Tourist Arrivals (million)			Growth Rate %		Global Tourism Market Share % (Arrivals)			International Tourism Receipts (US\$ billion)			Tourism as share of total exports %	
1995	2000	2001	'99/'00	'00/'01	1995	2000	2001	1995	2000	2001	Africa	World
20.2	27.2	28.4	3.7	4.3	3.6	3.9	4.1	7.3	10.8	11.7	7.18	6.63

Source: World Tourism Organization, 2002

The strength of African tourism lies fore and foremost in its cultural and environmental resources, and in the diversity and authenticity of its products. Ancient cultures, unique natural parks, unspoiled beaches, and the fascination that the African continent still exerts on the imagination of tourists, are the elements on which the competitive advantage of African tourism is based (see Appendix II on the Characteristics of tourism in Africa).

For the results so far achieved, tourism has been Africa's unsung success. This silent success can be converted into one of the strongholds of Africa's future development.

The impact of tourism on African economies

World Travel and Tourism Council (WTTC) forecasted tourism to produce 7.5% of total employment in Sub-Saharan Africa in the next decade. Likewise, investment in the sector is estimated to grow at 5% annually, where today already accounts for 11.7% of total investment in SSA, or US\$6.1 billion (WTTC, 1999).

Several economic sectors in Africa, such as agriculture and mining, have suffered adverse shocks in the past, due to internal factors like environmental degradation and fragile ecosystems, and external factors such as lack of access to agricultural markets and deteriorating terms of trade of African agricultural exports (ERA, 2002). Nevertheless, tourism appears to be relatively less vulnerable than other sectors.

In Africa more than anywhere else, tourism is built on natural and cultural resources, which are usually among the few assets owned by the poor. Thus, tourism contributes to reduce vulnerability to shocks, especially through the enhancement of that very resource base on which it is built and that constitutes the assets that belong to African countries and to the poor sections of African population, increasing economic diversification of African economies, and reducing their marginalisation in the global scenario.

Tourism is one of the main sources of foreign exchange for the majority of African countries. Tourism is significant (over 2% of GDP or 5% of exports) in 27 African Countries. In a study on tourism in Africa (English in World Bank, 2001), net foreign exchange earnings range from 50% of gross expenditures to as much as 90% in more advanced economies.

Notwithstanding, developing countries, and LDCs in particular, have to cope with a series of problems that impinge on the growth of their tourism industries. We can divide them into structural constraints and shock factors.

Structural constraints

1. Lack of infrastructures
2. Unskilled human capital
3. Leakages
4. Poor linkages

Shock factors

1. Environmental factors
2. Political instability and other safety issues
3. Economic factors

Appendix II contains a detailed review of these major constraints and problems.

If tourism is to become a major option for African development, it is compulsory to analyze its potentialities for poverty reduction purposes.

The pro-poor possibilities of tourism are a policy option of some interest in the economic development of Africa. Poverty reduction through pro-poor tourism can be significant: pro-poor strategies appear able to tilt the industry, at the margin, to expand opportunities, and they have potential for wide application across the sector if included into tourism development strategies of governments and business.

The next sections are dedicated to this argument, and will attempt to answer to some important questions: Can tourism be pro-poor? How? What does the evidence teach us about pro-poor tourism strategies in Africa? Which are the possible areas of intervention and at which level? What the expected outcome?

Tourism And Poverty: Can Tourism Be Pro-Poor?

Pro-Poor Growth For Africa's Development

Most African countries' recent growth trends appear to be above 3%, with positive implications for poverty reduction (ERA 2002; UNECA). Nevertheless, some unresolved issues still indicate that the road towards the achievement of the Millennium Development Goals is long and tortuous:

- A glaringly penalizing debt burden, although in decline;
- A performance gap in the production and management systems;
- Conflicts, political instability and social turmoil;
- The effects of the HIV/AIDS pandemic;
- Low levels of education, poor health status and high fertility rates that afflict the population;
- Gender and ethnic discrimination that acerbate inequality;
- Worsening terms of trade and declining international prices for primary commodities exported abroad;
- An insufficient growth of per capita income, +1.9% in 2001, a clear symptom that reflects the scarce growth in productivity, caused in turn by poor resource management and a lack of technological progress.

Indeed, there has been a substantial and often worsening of poverty in Africa, and comparisons with poverty indicators from other developing regions indicate that poverty is becoming Africanized. Close to 50% of the population of Sub-Saharan Africa lives on less than US\$1 per day (World Development Indicators, 2001). How to tackle this dramatic situation?

Evidence shows that growth alone is not sufficient to stop the marginalization of the continent and to improve the standard of living of its inhabitants (Ravallion and Datt, 1999; Eastwood and Lipton, 2001; Kakwani and Pernia, 2000; Asea, 2002). Although some corrections are needed, stabilization and structural adjustment programmes and poverty reduction strategy frameworks such as PRSPs and the E-HIPC Initiative, will benefit Africa in the medium-long term through better economic performance but they will not be sufficient (ERA 2002; UNECA).

What is necessary for poverty reduction is a strategy of pro-poor growth in which economic growth is combined with reductions in inequality. Pro-poor growth is defined as "one that enables the poor to actively participate in and significantly benefit from economic activity" (Kakwani and Pernia, 2001).

This implies a growth path that is labor intensive and is concentrated in rural areas, i.e. a growth that targets the poorest amongst the population.

Can tourism be pro-poor? An analysis of the industry

This section will try to shed lights on the characteristics of the tourism industry in order to help to answer the overarching question of the paper: can tourism contribute to poverty alleviation?

Relevant features of the tourism industry are divided into positive, negative and controversial, in relation to their potential for poverty reduction.

Positive Features

Labor intensive

Tourism is labor intensive, with on average two employees per hotel room in developing countries (Christie and Crompton, 2001). Another study (WTO in Page, 1999) on data from the hotel sector, shows that tourism is more labor intensive in low labor cost countries. On average, the number of employees per room is 3.3 in Africa, 0.5 in Europe, and 1.7 in Asia, with South Asia aligned with African levels.

Next table compares labor intensity in tourism with other economic sectors in various developing countries. A labor-intensive sector would contribute more to employment than to GDP, with an average above the unit. In these specific cases, tourism gets close to unity. Unfortunately there are no country specific data for Africa other than RSA.

Table 3
Comparison of the labor intensity of tourism to other sectors using
Employment: Output ratios (EOR)

	Indonesia	Philippines	Republic of South Africa	Thailand
Tourism	0.74	0.97	0.84	0.93
Manufacturing	0.51	0.43	0.58	0.57
All non-agric.	0.67	0.72	0.54	0.67
Agriculture	2.75	2.07	9.70	3.67

Note. EOR: sector's %contribution to employment/sector's %contribution to GDP
Source: Page, 1999; p.99.

Three additional points are to be explored.

First of all, the general conditions of work brought about by tourism are healthier and safer than, for example, manufacturing and agriculture. Secondly, tourism employs a high proportion of women (see next point).

Besides the direct jobs created within the tourism sector, both at the investment stage (construction, manufacturing, etc), as well as for the labor required to run tourism establishments, indirect jobs are generated through outsourcing of certain services and small-scale enterprises, especially in agriculture, food processing, transport, distribution, and various light manufacturing industries (de Kadt, 1979). In addition, the linkages with the informal sector are strong: just consider the handicrafts sold by street vendors anywhere in the world.

Gender sensitivity

Although an accurate case specific analysis is necessary to appraise which kinds of jobs women have access to, since they are often excluded from managerial positions, roughly 46% of the workforce in tourism are women, with a great variation among countries, between 2% and 80% (where tourism is a mature sector women usually account for 50% of the tourism workforce) (UNED-UK, 1999).

Customers come to product

Unlike other economic activities, the customer comes to product, reducing the dependency from external factors, even if a certain amount of goods and services are usually imported from abroad to guarantee the proper functioning of the industry. Transaction costs also decrease because of that.

Multiplier effect

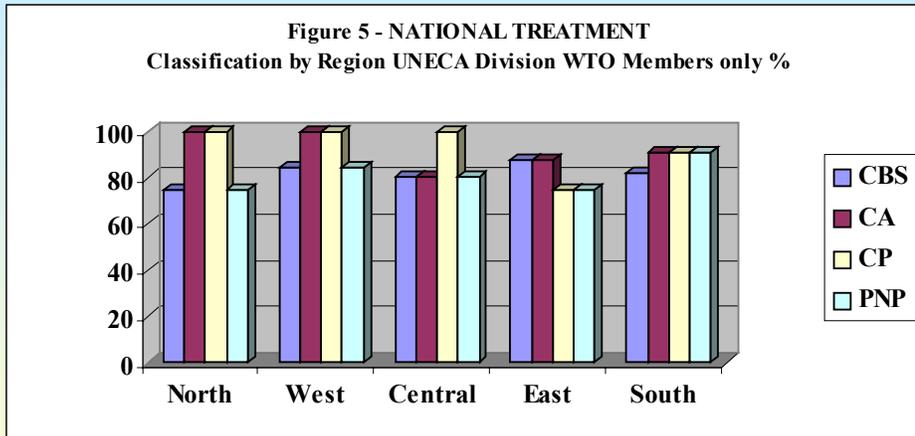
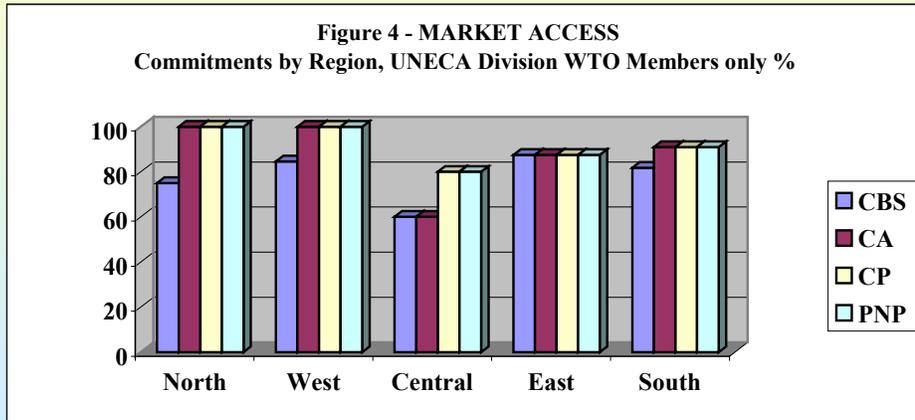
The multiplier effect of tourism spending is an interesting element of the industry itself. The possible “flow-through” or catalytic effect across the economy in terms of production and employment is high because of the links that tourism activities habitually have with local small producers as well as with the informal sector. The multiplier effect of tourism may be high or low according to some factors like the size of local economy (the bigger the local economy, the higher the positive effect that tourism will have on other sectors), the propensity of tourists to buy imported goods & services (the higher this propensity, the lower the effect on the local economy), and the propensity of residents to save money (the higher, the lower the circulation of money and therefore the multiplier effect of tourism on the economy) (UNESCAP, 2001).

Low barriers to entry

Barriers to entry are lower in tourism than in other traditional sectors: tourism does not suffer that kind of tariff and non-tariff barriers that agriculture does. It is instead a quite liberalized sector affected from other sort of constraints. In terms of commitments under the GATS, 120 WTO/OMC Members have made commitments, more than in any other sector. Nonetheless, the complete liberalization of the industry is far from being achieved, even at the level of the limited classification W/120 (Box.1 and Appendix II).

**Box 1
Tourism in Africa and the Multilateral Trading System**

Figure 4 &5 show the level of commitments made in the tourism sector by African WTO Members under the GATS:



See Appendix II, pag.52, for a more complete analysis of Tourism under GATS.

To attain efficiency in the service sector, and therefore in tourism too, it is not sufficient to overcome trade barriers, while a reform programme has at least three important dimensions (Mattoo, 2000): the introduction of competition, allowing a change in ownership (from public to private, or national to foreign hands), and instituting an appropriate domestic regulatory framework. For what concern competition, the major constraints affecting tourism lies in the presence of transnational companies in the tourism economy that benefit from economies of scale and exclusive access and knowledge: in tourism marketing (e.g. Global Distribution Systems for bookings are owned by few companies in OECD countries), in the accommodation sector (e.g. big hotel groups accounting for huge slices of the total bed capacity in single countries), in terms of bargain powers (e.g. big tour operators versus destination countries in need of generating foreign currency revenues), in the transport sector (e.g. airlines deciding frequency and routes for landlocked countries and small island states according to their passenger volumes breakevens and companies strategies).

Change in ownership, on the contrary, is not a relevant problem since private companies largely run the sector; and where government structures were in place, they have been widely privatized because of the inefficiency of state-owned tourism facilities.

A sound domestic regulatory framework is a major factor to foster tourism development for many reasons:

- To reduce anticompetitive practices and increase efficiency. E.g. in the airlines sector.
- To create an enabling environment for investment, both domestic and foreign. E.g. facilitating the ownership of land and the access to finance for private investors.
- To clarify issues such as licensing and qualification requirements for professionals (under GATS, mode 4, Presence of Natural Persons).

Tourism is based on natural and cultural resources

Probably the most relevant aspect of tourism for the current study is that it is largely based on natural and cultural resources that are plentiful in developing countries, conferring them a comparative advantage in the industry and making tourism a real option for poverty alleviation in poor areas. One good example is the Historical Route in Ethiopia, which brings tourists to some of the poorest areas of the country, like Lalibela in the north, home of the world famous churches carved in stone. Currently, no study assesses the distribution of benefits and costs among people who live in Lalibela: how many families benefit from tourism, as tourist guides, selling handicrafts, renting mules, working in the accommodation sector, or through the reinvestment in health and education of part of the tourism receipts earned by local authorities in the form of taxes and fees.

Resiliency

Data on the global tourism market reaction after the terrorist's attack in New York are a proof that the industry may recover from external shocks more rapidly than once thought.

Box 2

A quick turn from decline to stability: African tourism after 9/11

One of the characteristics of tourism is its capacity to recover from external shocks. This is probably due to the lack of product substitution and because the customer comes to the product to satisfy demand for leisure activities. In the September 11 aftermath, tourism figures sharply dropped. Morocco, after a promising 8% rise in the period January to August, lost 6.9% in October 2001, 22% in November and only 1.6% in December. Taken individually, African countries reacted differently to the outcome of September 11 events. In some way the immediate effect was mitigated over time, but this has to be qualified by the origin of tourism inflows as well as of the destination countries. For instance, Europeans have resumed travel much quicker than their North American counterparts. Accordingly, South Africa had a drop of 1.9% in 2001 due to its high dependence on long haul USA market. Generally, those African countries that depended heavily on US outbound travel experienced a greater impact on their tourism industry from the September 11 events, than those that were less depended on the U.S.A market. The crisis of the tourism industry in the Moslem world following these events also impacted negatively on the global industry.

Data Source: WTO, 2002.

Controversial Features

Elasticity

The upward trend in growth of the global tourism market is explicable with the high-income elasticity of the tourism product, which benefits both from the constant economic growth in the originating markets and by the low maturity of the product. Recent studies (see Maloney and Montes Rojas, 2001, for a review; Page, 1999) have assessed income elasticity for tourism between 1 and 2: tourism is still a luxury good, but qualifications are necessary between tourist originating countries, type of tourism products (leisure, business, visiting friends and relatives, others), and tourism niches (ecotourism, cultural tourism, adventure tourism, beach resort tourism, religious tourism, etc).

In general, wide improvements in welfare in western countries, which are the main generators of international tourists, together with an increasing diversification of tourism products

offered, and a drop in airfares – the main vehicle of international tourism - have all contributed to expand the potential demand market for tourism, hence easing its status of luxurious product.

Volatility

Tourism is considered to be a volatile industry. Political instability and safety issues are major areas of concern for every country willing to invest in tourism. In addition, changes in tourists' tastes influence the choice of product and destination. Movements in real exchange rates and wages affect prices and profits (Page, 1999): the effect will be higher on prices in large economies, because of the higher percentage of goods and services produced within the countries, while in smaller ones the consequences will be felt more on profits.

Even taking into accounts these factors, tourism appears to be relatively less volatile than other sectors. Tourism has generally a non-cyclical nature, not depending on rainy seasons or international markets as the export of agricultural products and other commodities. Traditional sectors are more volatile than tourism.

Besides, in many export sectors countries depend from their markets of reference while with tourism they are in a position to manage what happens in their own territory.

Substitution

Moreover, there are no substituting products for tourism, although the substitution effect is very high among destination countries and different tourism products. From the latter point comes the fierce competition on price, service quality and information.

Low capital intensive

Tourism is considered a low capital-intensive industry. The high number of small companies should confirm this point, contributing to include tourism among those industries with low barrier to entry. Few elements will help to put the situation in the right perspective.

Tourism is more capital intensive than once thought, even though there are huge differences in the entity of investment required according to the form of tourism development. If the tourism activity itself may entail a limited amount of investment and be small scale, tourism to thrive necessitate investment in other sectors, such as infrastructures, that notoriously are more demanding in terms of resource requirements. That is one of the reasons, but not only, why the role of governments is crucial, in planning, in providing basic services and in fostering public-private partnerships in key areas for tourism.

Negative Features

Verticalization

Tourism companies, such as hotel groups, airlines, or tour operators, have become increasingly transnational, through vertical and horizontal integration that virtually cut off small tourist operators, putting pressure on destination countries, mainly in developing countries, such as Small Island Developing States and landlocked countries (Lea, 1988).

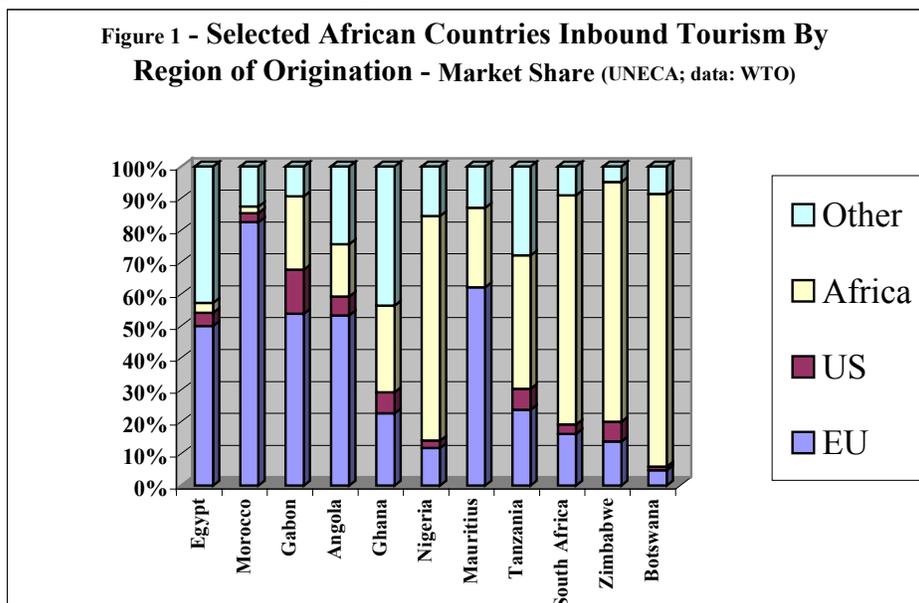
Seasonality

Tourism suffers of seasonality (peak, middle and off seasons). There is incompatibility between a high variance of cash flows with poor people's financial requirements.

Dependency from origination markets

The majority of international tourists, or at least the more affluent, come from Europe and US. Economic downturns in the originating markets affect their outbound tourist flows and as a consequence inbound tourist flows in destination countries.

This phenomenon takes quite a different bend in Africa due to the considerable number of regional tourists: although international tourists produce higher expenditure per capita, regional flows are even more important in some African countries.



Market trends

Market trends in tourism are highly variable in nature, and a destination that attracts tourists today may rapidly lose its advantage tomorrow. Hence, the great investments in promotion and marketing.

Effects of political and social instability

Political stability and good governance are undoubtedly two prerequisites for a thriving tourism industry. Political instability, wars, and ethnic violence, have afflicted many African countries during the last decades, and slowed or disrupted their tourism industry. Angola and Mozambique are only now starting to exploit their territories for tourism. Zimbabwe, from being one of the top African destinations with more than two million visitors a year, has now registered a dramatic 44% drop in tourism receipts in the first half of 2002, US\$24.1 million against US\$43.3 million in the same period of 2001, due to its internal economic, social and political instability (Zimbabwe Tourism Authority, 2002). The negative trend of tourism in Zimbabwe started in 1999, and continued in the next two following years, with a widespread effect on the whole national economy (ERA, 2002).

Countries like Kenya, where tourism was once thriving, becoming in 1991 the first foreign exchange earning sector, have paid a heavy price because of poor governance. Crime and corruption reflect a bad image abroad; poor planning resulted with congestion in key areas; the political situation has surely increased concerns among tourists (Kareithi, 2003).

Environmental, social and economic impacts

Table 4
Tourism Negative Impacts

Environmental impacts: consume of water resources, use of local resources, land degradation, air pollution and noise, solid waste and littering, sewage, aesthetic pollution, construction activities, marina development, deforestation, alteration of ecosystems, contribution to climate change.
Socio-cultural impacts: commodification, standardization, loss of authenticity, culture clashes, social stress, crime generation, child labor, sex tourism
Economic impacts: leakage, increase in prices, infrastructure costs, economic dependency, seasonality.
<i>Source:</i> UNEP Tourism website.

Any form of tourism development provokes, to some extent, some environmental, social and economic impacts in the destination area. Clearly, some forms have greater impacts than others. A list of some of these impacts is provided by UNEP in Tab.4.

A potential area of study concerns the application of Contingent Valuation Methods (CVM) to tourist areas, such as national parks but not exclusively, to determine the willingness to pay (WTP) of tourists, for instance to access protected areas. Two possible applications are:

- a. Comparative study on the WTP of international, regional, and domestic tourists
- b. Comparative study on WTP in developed countries and in developing countries for similar attractions.

The aim is to allow developing countries to retain a higher value added of tourism receipts, increasing and differentiating prices where possible, while optimizing the conservation of the resource base (see Adamson and Castillo, ?).

Leakages

“Leakage is the process whereby part of the foreign exchange earnings generated by tourism, rather than being retained by tourist-receiving countries, is either retained by tourist-generating countries or repatriated to them” in various forms (Diaz, 2001; pag. 168). UNCTAD (2001) highlights the following sources of leakages:

- Repatriation of profits;
- Imported skills, expatriate labor;
- Imported commodities and services;
- Imported technology and capital goods;
- Increased oil imports;
- Advertising and marketing efforts abroad;
- Transporting tourists to the destination country.

Leakages can be divided in internal, external and invisible, each of them producing specific outflows of foreign exchange. According to the few data available, the average leakage for developing countries varies from 10-20% in diversified economies, to 40-50% in smaller economies, with peak of 75%, like in The Gambia. Although these data are useful to give an idea of this phenomenon, their reliability is to be verified.

A certain level of leakages is inevitable, because some goods and services serve as inputs for the tourism activities. Besides, overseas marketing is an essential part of the tourism product and should not be considered as a leakage. What is important is to define what level of leakage is appropriate for a specific country, according to its level of development and economic structure, its national policy objectives, and the type of tourism development. This is possible carrying out a cost-opportunity study that will establish a “leakage break-even point”, and calculating the value added in tourism per each country, measured as tourism income per

tourist arrival (Y_t/A_t). Increasing the value added offset the effects of leakage by incrementing the residual earnings of a country (Perez Ducy-de Cuello, 2001). More important is how to turn leakages into linkages, and this is what needs to be worked out.

Tourism policy for poverty alleviation purposes

In 1999, the United Nations General Assembly and the Commission on Sustainable Development indicated, among the priorities for tourism and sustainable development, “to maximize the potential of tourism for eradicating poverty by developing appropriate strategies in cooperation with all major groups, and indigenous and local communities” (UNCSD, 1999). More recently, the importance of tourism for socio-economic development especially in developing countries and island states have being given prominence in a book by UNEP, “Tourism and Local Agenda 21”, follow-up of the 1996 “Agenda 21 for the Travel and Tourism Industry (WTO/OMT, WTTC and the Earth Council), that focuses on the role that local authorities can play at a destination level to promote a form of tourism more equitable, and environmentally and socially concerned (UNEP & ICLEI, 2003). The latter document, despite outlines the significance of tourism for development, for instance in bringing down unemployment and as an integrating activity to agriculture, as in the case study of the island of Marie-Galante in the French Caribbean, is not centered on poverty reduction.

Most of the policies in the 90s were focused more on the environmental aspects of tourism, while development considerations were left out or received less attention. In the late part of the decade development issues gained ground. In particular, the positive and negative impacts of tourism activities on local communities started to be included in policy documents, codes, principles and standards. The UNEP’s “Principles on Implementation of Sustainable Tourism” (UNEP, 1999) and WTO/OMT’s “Global Codes of Ethics” (WTO/OMT, 1999) both entailed programmes, activities and standards that aimed at increasing the benefits for host countries and communities. Many of the codes of conduct, guidelines, standards and certifications developed by the industry reflected this change, but still, poverty was not the core element and the driving force behind them (see study by Roe et al, 2003 – PPT Working Papers).

In 2001, the Canary Islands Declaration on Tourism in LDCs (UNLDC III, 2001a) indicated tourism development as “an avenue to increase participation in the global economy, alleviate poverty, and achieve socio-economic development for all the people of these countries”, as part of the actions to undertake to make progress towards poverty eradication, peace and development in LDCs (UNLDC III, 2001c). The link between tourism and poverty, that had seen the first corner stone placed at the UNCSD in 1999, began to be institutionalized in the decade (’98-’08) dedicated to the fight of poverty in the world.

Merely the first steps have been taken, not only to see the application of such ideas, but also a comprehensive institutional effort towards poverty reduction through tourism development that would lead to the manufacture of an effective strategy/plan of action at different levels: international, national, and local.

To date at a national level in Africa tourism has been scarcely included in poverty reduction policies. In part, because of the limited application of tourism policy frameworks around the continent: only a minority of African countries have effective Tourism Master Plans, due to the secondary role often reserved to tourism. Undoubtedly, the insufficient knowledge on the potentialities of tourism for wealth creation and redistribution in poor areas has also played a role.

In addition, governments may have lacked the incentives to introduce policies and reforms in a non-priority sector, unless where evidence of significant growth of tourism and its tangible benefits on national economy have been clearly registered. In similar situations, it is more effective for governments to stress the evidence produced by some best practice cases, and from these identify systemic problems and formulate objectives that eventually would be amended or extended to other areas through policy and reforms, rather than directly proceed to institutional policy and reforms.

The South African Government has possibly been the more active in developing an array of initiatives that, from the “White Paper on the Development and Promotion of Tourism” in 1996, through the 1997 report “Tourism in GEAR” (Growth, Employment, and Redistribution), and the “Responsible Tourism Guidelines” in 2002, have promoted the role of tourism not only as one of the top five economic contributors, but as well as an engine of growth for local communities and in particular for “historically disadvantaged individuals” (HDIs)². Since then, a series of government programmes have encouraged the inclusion of poverty concerns in tourism policy. The most important is the Poverty Relief Programme of the Department of Environmental Affairs and Tourism (DEAT, 2001) that seeks to alleviate poverty in South Africa’s poorest communities through the creation of long-term sustainable work opportunities. In the tourism sector, it seeks to increase the tourism potentials by creating new facilities or infrastructures, and assisting local communities in producing and delivering better quality tourism services. Tourism Infrastructure Projects have included roads, information centers, walking paths, park fencing, among the others; Tourism Product Development varies from cultural villages, museums, accommodation, and craft manufactures.

DEAT’s Poverty Relief Programme prioritizes areas and projects on the basis of social conditions (like unemployment, underdevelopment and neglect), emerging

² Definition in the Constitution of the Republic of South Africa, 1996

market trends and national tourism strategy. Some of the initiatives are (DEAT, 2001):

- Spatial Development Initiatives, that aim at unlocking the inherent, under utilized economic development potential of certain locations, such as the Lubombo SDI and the Wild Coast SDI;
- Priority Areas for Tourism Infrastructure Investments (PATIIs), that are areas with high tourism development potentials;
- World Heritage Sites, like Robben Island and Ukahlamba-Drakensberg;
- National Parks and reserves;
- Transfrontier Conservation Areas, such as Kgalagadi and Gaza-Kruger-Gonarezhou;
- Wetlands of international importance.

Other relevant government and parastatal programmes in South Africa are (Spenceley and Seiff, 2003):

- Tourism Enterprise Programme (TEP): provides technical assistance to new entrants in the tourism sector;
- Tourism Learnerships and National Qualifications (NQ): offers learning and workplace experiences to HDIs;
- Responsible Tourism Manual, Responsible Tourism in Destinations conference, Fair Trade in Tourism South Africa (FTTSA): they are all initiatives aiming at promoting best practices in tourism that work better for visitors, local communities and business;
- The Community Public Private Partnership Programme (CPLPP) of the National Department of Trade and Industry encourage partnerships between the state, the business sector, and local communities, in particular in rural areas, through the facilitation of investments. CPLPP promotes “environments suitable for the development of commercial joint ventures by developing guidelines, frameworks, and other support materials relevant to the South African Region” (CPLPP website, 2003). One of the focus areas is tourism: at present, 5 projects are being developed in a range of tourism opportunities, all of them seeking for joint venture partnerships between the different stakeholders, with the goal of producing spin-offs for future development and poverty alleviation, while being commercially viable.

A further confirmation of the scant inclusion of tourism in poverty policies at national level is offered by Table 5, which lists and ranks the relevance that tourism as a sector receives in African countries’ PRSPs and I-PRSPs.

Table 5
Tourism In African Countries' PRSPS &I-PRSPS

RANKING OF TOURISM				
Relevance of tourism for poverty alleviation according to the nature of its inclusion in national PRSPs and I-PRSPs: 1 - Tourism is indicated as a major sector for pro-poor growth and poverty reduction 2 - Tourism is included in the sectoral plan 3 - Tourism is scarcely mentioned 4 - Tourism is not mentioned				
Country	Status	Year	Rank	Relevance of tourism in countries' I-PRSPs or PRSPs.
BENIN	PRSP	2002	2	Tourism is important for foreign exchange generation (2 nd after fishing). The objective is to encourage tourism development and improve the infrastructures.
BURKINA FASO	PRSP	2000, 2001, 2002	2	Tourism related to artistic events. Potential products to be developed: Sea-Sahel and specialized tours
CAMEROON	I-PRSP	2000	3	Tourism is mentioned among the "other sectors" that can contribute to growth.
CAPE VERDE	I-PRSP	2002	2	Tourism is the most dynamic sector to bring growth and integrate the country in the world economic system.
CENTRAL AFRICAN REP.	I-PRSP	2000	3	Tourism is scarcely mentioned among the sectors of interest that create employment and income.
CHAD	I-PRSP	2000	4	Tourism is not mentioned.
CONGO, DR	I-PRSP	2002	4	Tourism is not mentioned
COTE D'IVOIRE	I-PRSP	2002	2	Tourism is included among the Strengths and Assets for poverty reduction and growth policies, although its pro-poor growth potentials are not enlisted.
ETHIOPIA	PRSP	2002	2	Tourism is important for its foreign exchange earning capacity. It has been included among the private sector and export development.
The GAMBIA	I-PRSP	2000	2	Tourism is one of the three major sectors for foreign currency earnings. NOTE: tourism is scarcely considered in the study.
GHANA	PRSP	2003	2	Tourism is the third sector for foreign currency earnings, and an important one for employment generation, also due to its multiplier effect on the rest of the economy. Also mentioned is the capability of tourism to generate employment in areas where the poor live.

GUINEA	I-PRSP	2000	1	Tourism is among the growth-oriented, income-generating sectors. It can also produce valuable results for poverty reduction at a local level. NOTE: the policies and strategies required are not extensively treated in the paper.
GUINEA BISSAU	I-PRSP	2000	3	Tourism is with agriculture, fisheries and forestry resources, the main source of growth.
KENYA	I-PRSP	2000	2	Tourism is considered one of the key sectors to revive economic growth.
LESOTHO	I-PRSP	2000	1	Tourism is considered an important sector for foreign exchange and employment generation, but also to offer new alternative livelihood opportunities to some local communities.
MADAGASCAR	I-PRSP	2000	2	Tourism is among the high-growth sectors, although under-exploited, and the first source of foreign currency. NOTE: not extensively treated.
MALAWI	PRSP	2002	1	Tourism is recognized among the sectors that can contribute to poverty reduction especially in rural areas, as a source of pro-poor growth.
MALI	PRSP	2003	3	Although scarcely mentioned, tourism potential for poverty reduction in the Timbuktu region is acknowledged.
MAURITANIA	PRSP	2000, 2002	2	Together with fishing and mining, tourism is among the export sectors whose potentials should be fully developed.
MOZAMBIQUE	PRSP	2001, 2003	2	Tourism is included among complementary activities. Its importance lies mainly in raising incomes of local producers.
NIGER	PRSP	2002	2	Tourism is among the sectors with strong growth and employment generation potentials.
RWANDA	PRSP	2002	2	Tourism appears in the private sector development section, as a potential earning of foreign currency, as it was before 1994.
SAO TOME & PRINCIPE	I-PRSP	2000	2	(Full text not available) Tourism is important to promote job creation.
SENEGAL	PRSP	2002	2	It is important to preserve and develop tourism potential, since it is the second sector for foreign exchange earnings.
SIERRA LEONE	I-PRSP	2001	3	Tourism is among the sectors that can contribute to the revival of the economy.
TANZANIA	PRSP	2000, 2001, 2003	1/2	The Government is exploring ways for making the tourist sector more pro-poor. NOTE: the strategy is not well explicated

UGANDA	PRSP	2000, 2001, 2002	3	Poverty Eradication Action Plan: Expenditure on tourism promotion may be considered.
ZAMBIA	PRSP	2002	1	The vital role of tourism for economic growth and to create opportunities for the poor, especially in rural areas, is acknowledged. Together with agriculture, tourism is planned to play a vital role in diversifying Zambia's economy. Around 5% of PRSP Budget is allocated for tourism. NOTE: a whole chapter is dedicated to tourism.
Data: Countries' PRSPs and I-PRSPs. UNECA study.				

Only Zambia, Malawi, Guinea and Lesotho, and to some extent Tanzania, give relevance to tourism for poverty reduction purposes in their PRSPs. Other 15 countries embrace tourism in their sectoral plans, mainly as a foreign exchange earner or employment generator, and more broadly as a source of economic growth, but they do not mention its possible contribution in creating opportunities for the poor. In the remnant countries' PRSPs and I-PRSPs tourism is scarcely mentioned (6) or not at all (2). This despite the increasing importance of tourism in developing countries and in Africa, and the aim of PRSPs of promoting growth to reduce poverty.

There is a lack of consideration and information about how tourism could contribute to produce outcomes that directly benefit the poor, to shift away from just the growth of the industry or its contribution to macroeconomic indicators.

Some of these critiques are directly referable to PRSPs themselves: "sector policies remain usually poorly aligned and inconsistent with mutually agreed priorities identified in PRSPs" (Nwuke, 2003; UNECA). Besides, if the role of the private sector for stimulating growth has been generally acknowledged, private sector's representatives are not involved enough in the participatory process (World Bank, 2002) and this, together with a sectoral analysis that in some cases is not robust enough or not extended to the whole spectrum of sectoral opportunities available, bring to a shallow exploration of the private sector potentialities for poverty reduction.

The inclusion, or better, a more extensive consideration of tourism in national PRSPs, would definitely link the sector to poverty reduction, with an immediate effect of concentrating efforts on designing and implementing policies and poverty strategies ad hoc for the characteristics of the industry, enhancing thus the positive effects on the poor, especially in rural areas.

Table 5 also shows how weak tourism ministers are politically. It is very difficult for them to compete with sectors that occupy a higher ranking in the governments' priorities.

The next paragraph will cover some relevant case studies in Africa where tourism has had an impact on poverty.

Pro-Poor Tourism in Africa

“Pro-Poor Tourism (PPT) is not a specific product or sector of tourism, but an approach. PPT strategies aim to unlock opportunities for the poor – whether for economic gain, other livelihood benefits, or participation in decision-making”
(Ashley et al, 2001).

The PPT approach has been developed by the Pro Poor Tourism Partnership, a collaborative research initiative by ODI (Overseas Development Institute), IIED (International Institute for Environment and Development) and ICRT (International Center for Responsible Tourism). Its goal is to bring poverty reduction at the heart of the tourism agenda, taking advantage of the nature of the industry, its relevance in developing countries, and the positive impacts that can have on poor people and their livelihoods.

During the last 4-5 years, a series of case studies on tourism and poverty have been conducted around the world; if we include the work done by ODI and ODI with Fair Trade in Tourism (the Sustainable Livelihoods Working Paper Series), case studies on tourism and poverty cover countries from Africa (Uganda, Namibia, The Gambia, South Africa, Kenya) to South America (St Lucia, Ecuador), from Asia (Nepal, India, Indonesia, Philippines, Vietnam) to Europe (Czech Republic). Most of these studies (Tab.6 reports the African studies) are related to tourism development at a community level, mainly in poor rural areas, but not exclusively.

PPT put the livelihoods of the people at the center, therefore their livelihood activities (such as livestock, agriculture, renewable natural resources harvesting, employment, small enterprise), strategies (like cope with drought, diversification/minimization of risk, maintain liquidity and flexibility), and their priorities - what people really want for themselves (Ashley, 2000).

Table 6
PPT Case Studies in Africa

Case Study	Country & Organization	PPT Initiative
Wilderness Safari: Rocktail Bay and Ndumu Lodge.	Maputaland, South Africa Org> private tour operator	Contractual relationship between a tour operator, a community and a state conservation agency to develop up-market tourism lodges, support local employment and other community-based initiatives.
Makulele; Manyeleti.	Northern Province, South Africa Org> SA Government and Development Bank of Southern Africa	Government tourism development strategies within the Spatial Development Initiative and the Community Public Private Partnership Programme, aiming at combining investment support and infrastructure development with empowerment objectives.
Coral Divers	KwaZulu Natal, South Africa Org> private diving operation	Formal (employment) and informal (employment, outsourcing, craftworks, etc) relationship between private operator and neighbor Tribal Authority.
Jackalberry Lodge	Limpopo, South Africa Org> private safari operation	(Little) formal and informal relationship between the private management of the game reserve, and the neighbor community.
Phinda Resources Reserve	KwaZulu Natal, South Africa Org> private safari operation	Active relationship between the game reserve operator and the three neighboring communities, involved beyond employment, in health, educational and entrepreneurial initiatives.
Sabi Sabi Private Game Reserve	Mpumalanga, South Africa Org> private consortium of local landowners; safari operation	The neighbor community has in the game reserve, overseen by a consortium of local landowners, the main source of employment.
Sun City	North West Province, South Africa Org> casino and golf resort	The golf and casino resort is the main source of income for the neighbor community.
Namibia Community Based Tourism Association	Namibia Org> Domestic NGO: NACOBTA	Technical support (technical assistance, finance, marketing, training) to community tourism enterprises. Lobbying and advocacy with government and private sector on behalf of

(NACOBTA)		community tourism enterprises. Facilitation of community-private sector partnerships.
Uganda Community Tourism Association	Uganda Org> Domestic NGO: UCOTA	Technical support (technical assistance, finance, marketing, training) to community tourism enterprises. Lobbying and advocacy with government and private sector on behalf of community tourism enterprises.
Narok District	Rift Valley, Kenya Org>Local communities and individuals	Strategies employed by locals to cope with tourism decline in the region.
The Gambia	The Gambia Org> DFID Tourism Challenge Fund and ASSET (Association of Small Scale Enterprises in Tourism)	Improve linkages between formal and informal sector.
<i>Source:</i> PPT Working 2000. UNECA elaboration		

Relying on the evidence collected from the above case studies, we attempt to list some of the advantages and disadvantages of such an approach.

Advantages of PPT for poverty reduction purposes

❶ PPT focuses on poverty

PPT differs from other forms or concepts of tourism because it has poverty reduction as the prime goal (Ashley et al, 2001). It differs from sustainable tourism, whose main thrust is on environmental sustainability. The environment is a component of PPT because it is a critical resource base for the poor, but its protection and conservation are not the overarching goal. Similar, sustainable tourism is frequently, and sometimes wrongly, categorized as alternative tourism: ecotourism, rural tourism, community based tourism, adventure tourism, cultural tourism, etc. But the PPT approach is applicable also to large-scale forms of tourism, or mass tourism: the Sun City case study demonstrates how a resort of that kind can produce benefits for the poor.

PPT is different from community based tourism (CBT): although local communities are often an important component of PPT, PPT goes beyond them, because it aims at unlocking opportunities for the poor, no matter at what level - local, national, or sovranational - and no matter what strategies are necessary; while in CBT the community is always the final stakeholder.

Equally, PPT has elements in common with rural tourism, but it is a wider concept than the latter, because: a) it can be brought forward also in urban areas; b) rural tourism mainly aims at creating employment and income opportunities for local people, while PPT embrace a bigger range of costs and benefits.

Concentrating on poverty, PPT strategies are measured according to the positive and negative impacts that the poor endure (see Tab.7).

Table 7
PPT Survey to follow-up research carried out in 2000-01
Assessment of the impacts that tourism has on poor people

<u>Questionnaire distributed to authors and implementers of PPT case studies.</u>		
Question: has the research led you to:		
1. Give more importance to these impacts?		
2. Increase the effort you make to achieve them?		
	Importance Increased %	Implementation changed %
Aggregate, collective income	58.3	25.0
Wage income for individual employees	33.3	25.0
Casual income, micro-enterprise earnings	41.6	25.0
Distribution of benefits	58.3	16.6
Human capital (skills, education, health)	75.0	33.3
Physical capital (infrastructures, etc)	41.6	25.0
Financial capital (credit and collective investment)	41.6	25.0
Social capital and community organizations	50.0	33.3
Access to natural capital (land, water, etc)	41.6	33.3
Access to information	75.0	25.0
Influence over the policy context	41.6	16.6
Access to market opportunities & livelihood options	66.6	33.3
Cultural values	41.6	8.3
Optimism, pride and participation	25.0	8.3
Exposure to risk and exploitation	41.6	16.6
Source: Meyer, 2003		

❶ PPT embraces the multifaceted dimensions of poverty

Poverty encompasses not only material deprivation, but also low achievements in education and health, vulnerability and exposure to risk, voicelessness and powerlessness (World Bank, 2001). This definition from the World Development Report 2001, if already entails the assets on which the poor draw upon – human, social, financial, natural and physical capital – could be even more centered on people if, as described by the sustainable livelihood approach developed by DFID, explicitly put people’s livelihoods at the core, to strengthen the complex range of capabilities, assets, strategies and activities on which the poor depend on (Norton and Foster, 2001 for DFID).

Such a comprehensive and people oriented conception of poverty drives PPT initiatives. The positive impact of tourism on poor people’s livelihoods is not only economic, but differs in nature, and can include empowerment, decreasing vulnerability, preservation of culture, physical security and more. To maximize the positive impacts and minimize the negative ones, what counts is what the poor believe it matters for them, which can vary: petty cash, employment compatible with agriculture or grazing, fencing against animal intrusion, more dignifying ways of making a life than hawking, general education, access to basic health services, and so on. The same concept applies to some negative impacts that may not look severe from an outsider’s perspective, but cause great problems to fragile and risk-prone communities, e.g. tension between members or competition on scarce resources like land and water.

PPT seeks to tackle poverty in its multidimension, including:

Economic strategies of PPT concentrated on economic benefits: expansion of business opportunities and employment opportunities, and enhancement of collective benefits.

Strategies focused on non-economic impacts: capacity building, training, empowerment; mitigation of the environmental impacts of tourism on the poor; addressing of social and cultural impacts of tourism.

Strategies focused on policy/process reform: building more supportive policy and planning frameworks; promoting participation; bringing the private sector into pro-poor partnerships (Ashley et al, 2001).

Tab.8 lists some of the impacts that PPT strategies have on local people and their livelihoods, based on the elaboration of PPT case studies.

Table 8
Impacts of Pro-Poor Tourism Strategies on Local People and their Livelihoods

Positive Impacts	Negative Impacts
Creation of jobs	Concentration of job creation among the better-off
Capacity building: General education, training and skill transfers e.g. funding for local schools, training of artisans, etc; technical assistance and business advise: e.g. assistance in tender processes; institutional capacity building	Intra-community tension
Outsourcing: Local provision of services; consumption of local food and agricultural products	Pressure on natural resources
Empowerment: Joint planning and implementation of tourism products; focus on women; creation of local business associations	Failure to meet expectations
Access to grants, loans and credit for micro and small enterprises	Incompatibility with existing livelihoods: crop and stock losses
Donors' and government's funds availability	Reduced access for the use of natural resources in the area
Development of complementary tourism enterprises: e.g. craft initiatives and cultural displays	Problems with wildlife in the reserves not compensated
Financial earnings: Better wages; casual earnings (crafts, supplying of food, etc); communal income (Lease fees paid by private operators; dividends; percentage on turnover shared by staff	
Land restitution and increase security over land by catalyzing support for land claims	
Infrastructure development: Sanitation (e.g. malaria control, health standards, etc), schools, telecommunication, roads, power, drinking water, etc	
Reduced vulnerability to external shocks (through market access)	
Non-financial benefits: Medical aid, pension fund, housing, meals, gratuities from guests	
Support to Small, Medium and Micro enterprises	
Source: PPT Working Papers 2001-2003. UNECA elaboration.	

❶ PPT is relevant to pro-poor growth

Using the data collected by case studies in Africa, Asia and South America, the contribution of PPT to pro-poor growth can be measured as follow (framework from Ashley et al, 2001; pag.38):

Increasing demand for goods and services of the poor

Although big discrepancies may occur from location to location, tourism, if targeted on the poor, may foster employment and produce financial revenues that would directly benefit them (see Tab.9).

Table 9
Level of local employment
From selected South African case studies

	Proportion permanent staff employed locally	Proportion of wage bill going to locals	Direct and indirect beneficiaries (estimate) N. Individuals	Proportion of men & women employed
Coral Divers	64%	~45%	259-296	49% M; 51% F
Jackalberry	32%	Unknown. But 68.3% of staff were HDI ³ earning 41.7% of wage bill	91-104	71%M; 29% F (excluding farm employees is 57% M; 43% F)
Phinda	~80%	70-75%	1,400-1,600	60% M; 40% F
Sabi Sabi	76%	70%	980-1,120	54% M; 46% F
Sun City	66%	35%	9,296-10,624	55% M; 45% F
Source: Spenceley and Seif, 2003				

Reducing costs of basic needs

Tourism development may induce an increase of prices, especially for land and housing. On the other hand, it can reduce the cost of some services that have become more easily avail-

³ HDI: Historically Disadvantaged individuals. Constitution of the Republic of South Africa, 1996.

able, and can reduce transaction costs thank to infrastructure development. Benefits are higher if poor are considered a priori during planning and strategy formulation and before any investment is undertaken, e.g. settlement of the sewage system in a destination area.

More evidence is required, in particular on the positive effects, while the negative ones have already been extensively treated in the bibliography (e.g. from Pacific Islands: Fiji, Hawaii, Philippines and Bali).

Increasing the asset base

Evidence from the case studies show that tourism can increase the asset base of the poor, but many factors may determine the magnitude or even the sign of this contribution, such as: the level of development of the destination country (for instance: the more developed an economy, the lower the leakage); the initial level of inequality among the stakeholders involved; the persistence of non-income poverty, like the lack of education and health induced poverty that may undermine the opportunities of certain categories in tourism activities or cut them off from any benefit; ethnical or social clashes among communities; the role of local elites; the existence of an institutional framework that facilitate the accumulation of assets by the poor; the level of diversification of tourism activities.

Tourism contribution to poor people's assets accumulation is varied:

- Physical capital: tourism can bring roads, schools, clinics, electric power, sewage systems, and other general services required to meet international tourism quality standards, apart from tourism facilities like hotels and restaurants.
- Financial capital: wages, collective income, dividends, outsourcing of services, informal sector earnings, flow through effect benefits, are some of the possible sources of cash that tourism can produce for the poor.
- Human capital: tourism can have an impact on the skills, knowledge, ability to labor and good health that enable people to pursue different livelihood strategies (DFID, 2001). General education, training, stages, contact with other cultures, valorization of traditions, are some of the possible positive effects; sex exploitation, loss of identity, and begging, some of the problems.
- Natural capital: unquestionably tourism produces certain environmental impacts in the destinations, whose entity may be more or less disruptive on the natural resource stocks according to the nature of the environment (a pristine forest will suffer different impacts than a coastal area or a city), the implementation of environmental regulation and standards, the kind and stage of tourism development (ecotourism thrives on natural resources, while mass tourism is less concerned of them), and the environmental awareness of the stakeholders, to list some of the factors. Tourism may also contribute to environmental conservation through the creation of national parks, or the introduction of codes and standards aiming at preserving the resource base on which tourism is built.

Where national parks and reserves have been created, like in Kenya, Tanzania, Uganda, and South Africa, local people have often been ejected and denied access to their traditional lands, rarely compensated from government authorities. There seems to be now an inverse trend towards the compensation of locals in different forms, like money, job opportunities, land rights, partial access to land.

- Social capital: as well for social capital, facts show both a positive and a negative impact of tourism. Tourism activities can create tensions within a community because of the unequal distribution of benefits; tourism can induce the commercialization of traditions or the loss of traditional social nets, very important for the poor to reduce vulnerability in moment of crisis. But case studies, e.g. from Namibia and Uganda, also illustrate the creation of effective formalized groups and associations by and in the interest of the poor, such as NACOBTA and UCOTA. Or, again, the positive effect that tourism has in strengthening the community bondages through responsabilization in tourism management.

Box.3

UCOTA: Uganda Community Tourism Association

UCOTA act as a trade association and network for national Community Based Tourism Enterprises (CBTEs). Its aim is to benefit communities through sustainable tourism projects. At micro level, it provides advice to enterprises (product development, standards, business plans), training (guides, business skills, hand-craft skills), and promotional services (brochures, newsletters); at macro level UCOTA lobby government on tourism on behalf of the communities, and create liaisons with private operators.

Some of the communities included in the UCOTA programme are: Mgahinga, Buhoma, Bwindi, Kibale and Bigodi. Benefits range from training, income, infra-structures, raising pride.

Source: Spenceley et all, 2001

Decreasing exposure to vulnerability and risk

Tourism can contribute to reduce exposure to vulnerability and risk, as we have seen in the previous points. Undoubtedly, it also presents some elements that could increase risk and

vulnerability, such as seasonality, dependency from originating tourism markets, political instability affecting the destination regions' tourist flows, and changeability of market trends. But when tourism enhances the diversification of the sources of poor people's livelihoods, generating for instance non-farm incomes, it lessens the risk of negative shocks, even if increasing diversification does not automatically imply decreasing vulnerability (World Bank, 2001). One example is, like in Kenya, combining farming with curio hawking.

Increased government revenues benefiting the poor

Overall, tourism can indirectly produce benefits for the poor through taxation of revenues, if and only the government is keen to reinvest some money in their favor. Some ad hoc tourism programmes, as in some of the South African cases, entail government plans that direct benefits the poor, e.g. building schools, creating access to medical care, and so on.

Critiques of PPT approach

● Measuring the impacts

Many of the critiques moved to the PPT approach refer to the measurement of its impacts on the poor (Ashley, 2002).

- Difficulties in measuring the impacts of PPT initiatives on the poor: in terms of distribution of these impacts; collection of good data; scarce attention on impacts above the local level.
- The results from the case studies are biased towards positive impacts, although this could be also due to the encouraging involvement of PPT initiatives.
- The methodology does not provide guidance on how to analyze and interpret the information collected

● Bonsai approach

In the case studies, the PPT approach rarely goes beyond the local level. Notwithstanding the PPT definition talks about "strategies", in practice the PPT approach has not been embedded into policy making yet, for instance inside PRSPs or in government programmes, even though there are some exceptions. Like the sustainable livelihoods approach, from which it partially takes inspiration, PPT is by and large limited to a community level.

Tourism programmes specific for poverty reduction cannot be limited to local level, or otherwise they risk to be reduced also in the impact. For instance: some interventions that have a great benefit on the poor, such as those on infrastructures and the financial sector, are traditionally planned at a government level.

❶ Sustainability of the PPT approach.

Are PPT initiatives sustainable in the long run? Are they profitable and viable? Can they be replicated in every developing country?

Tab. 10 synthesizes some of the findings from the PPT case studies, defining sustainability as economic, social and environmental. It is questionable how to define sustainability (whose sustainability?); nevertheless, the strengths and threats listed give an idea of the problems and opportunities that these kinds of initiatives can produce.

Table 10
Sustainability of the PPT Projects
Findings from the case studies

THREATS	STRENGTHS
Economic Sustainability	
Slow growth of local businesses	Low staff turnover of locals
Low equity sharing: e.g. scarce distribution of communal incomes	Participatory process: increasing competent participation of the communities in the tourism activities
Lack of market opportunities	Production of income for all the stakeholders involved
Lack of investment capital	Planning gains: e.g. introduction of socio-economic criteria
Lack of credibility towards private investors	Increasing attractiveness at the eye of “development concerned” tourists
Lack of business and management skills	Strengthening and improvement of the small-medium enterprises network
Risk to frighten the investors off with the whole PPT process: e.g. high requirements, introduction of socio-economic criteria seen as a cost, etc	Empowerment of the communities through formalization of associations and their increasing support to tourism development in the area
Area not taken off as a tourism destination (low tourist numbers)	Strengthening of local economy through income diversification and creation of more investment opportunities
Lodges making a loss	
Dependency from donors’ financial assistance	
Uncertainty over land rights and reform	
High transaction costs of PPT	
Benefits are slow, compared to dense population in the area	
Limited resource base: high needs and low	

resources, lack of funding, etc.	
Lack of facilities to guarantee quality service (advance bookings, service delivery, etc)	
Lack of links with international tour operators	
Lack of capacity in tourism research (identification of markets and products)	
Commercial sustainability: scarce attractiveness and quality of the product	
Remoteness of certain locations: may prove difficult to attract tourists; distance from main resource markets	
Poor regulatory framework that increases the costs paid by the informal sector (e.g. bribes, fines) and disincentives to invest in PPT	
Social Sustainability	
Exclusion of the poorest	Planning gains: e.g. socio-economic criteria
Increasing role of the local elites	Increasing poor people's basic understanding of tourism
Tension among the community members	Increasing awareness of PPT by tourists
Dependency on donors' assistance and external expertise	Protection and evaluation of local cultures and traditions
Commercialization of local cultures	Increase contact and communication with the external world
Dependency on tourism	Enhanced cohesion within the community
Unrealistic expectations that lead to loss of interest	
Environmental Sustainability	
Lack of conservation authorities cooperation for tourism development	Environmental education
Pressure on natural resources (water use, littering, etc)	Natural resource management activities
	Sensitization of communities, tourist and private sector on environmental issues
Source: PPT Working Papers 2001-2003. UNECA elaboration.	

● **Involvement of the private sector**

Investors must perceive PPT initiatives as a commercial viable option. PPT has undeniably some characteristics that not only contribute to benefit the poor, but constitute an asset also for the private sector. The problem here is how to communicate these features to potential investors in a way that “speak their language”. The key to business language is quantification of PPT features in money terms, if you want. Hence:

- The support provided by governments and donors during PPT projects is quantifiable in money (assessments, courses, assistance to the community, policies, etc) and time saved by private investors.
- A whole new generation of tourists is very sensitive to “development concerned” tourism products, and PPT should be marketed to these potential customers that form a real market niche.
- The participatory process of PPT tourism creates an enabling environment for investment, because reduce tensions and help gathering together stakeholders with different knowledge and competences.
- Locals benefit from enhanced human skills; the private sector benefits from a better quality of tourism services offered.

The Way Forward

Tourism in NEPAD

Where then to intervene, and how, to make tourism a better option to bring socio-economic development in Africa and directly benefit the poor?

A useful framework is offered by NEPAD, the New Partnership for Africa's Development, the latest strategic plan to foster Africa's economic growth. African economies, because of their dependence on primary production and resource-based sectors and their narrow export bases, require production diversification to reduce their vulnerability. Africa's natural resource base is the logical starting point on which value added activities are to be found. The role of governments should be that of facilitators for the activity of the private sector at all levels: formal and informal, small-medium or large scale.

Box 4 Tourism in NEPAD

160. Objectives

- To identify key "anchor" projects at the national and subregional levels, which will generate significant spin-offs and assist in promoting interregional economic integration;
- To develop a regional marketing strategy;
- To develop research capacity in tourism;
- To promote partnerships such as those formed via subregional bodies. Examples include the Regional Tourism Organization of Southern Africa (RETOSA), the ECOWAS and the SADC.

161. Actions

At the African level:

- Forge cooperative partnerships to capture the benefits of shared knowledge, as well as providing a base for other countries for entering into tourist-related activities
- Provide the African people with the capacity to be actively involved in sustainable tourism projects at the community level;
- Prioritize consumer safety and security issues;
- Market African tourism products, especially adventure tourism, ecotourism and cultural tourism;
- Increase regional coordination of tourism initiatives in Africa for the expansion and increased diversity of products;

Maximize the benefits from the strong interregional demand for tourism activities, by developing specialized consumer-targeted marketing campaigns.

Under the Market Access Initiative, tourism, along with agriculture, mining, manufacturing, and services, is one of those sectors highlighted by NEPAD as possible areas of intervention that could produce positive results in terms of diversification and increase participation of Africa in the global economy through export of competitive products.

Tourism though, is not specifically designated as a sector that could generate pro-poor growth. Only one point, to “provide the African people with the capacity to be actively involved in sustainable tourism projects at the community level” touches issues like “empowerment” and “capacity building” that are capital elements of the current poverty discourse. NEPAD is the new paradigm for African development, a driving force that has in the eradication of poverty one of its overarching long-term objectives. The fact that it has been encountering the favor of both the African governments and the development partners constitute a chance that cannot be missed.

How then to incorporate poverty reduction through tourism within NEPAD? What actions are needed?

Where NEPAD could play an important factor, is in putting pressure on African governments to commit themselves for the inclusion of tourism in poverty reduction plans. Tourism is a highly private driven sector, and poverty concerns can only be stimulated by government action.

Some possible areas of intervention are:

- Institutional strengthening.

It includes provision of infrastructures and basic services in poor areas, especially in rural areas. Also promotion of national tourist products abroad, through national tourism boards, and campaign of sensitization towards pro-poor tourism products, such as community based tourism or cultural tourism, and more in general the advertising of the whole destination.

- Human resource development.

To enhance the involvement of the poor in tourism, and at the same time the quality of tourism services, governments have to undertake action for the provision of adequate educational, technical and professional training programmes, the creation of tourism schools, as well as guarantee general education for all.

- Policy formulation for tourism

Tourism has to be integrated into national policies, according to what are the level of development and the objectives of each country. This comprises the creation of condu-

cive legislative and financial frameworks for tourism: a) Legislative: commercial and labor laws, licensing system, immigration and custom procedures (e.g. facilitating the employment of foreign workers, unskilled and skilled, in the tourism industry), property rights, land titling, etc; b) Financial: investment incentives for new companies, trade facilitations, support to SMEs, facilitation of credit access for the poor, integration of the informal sector in the tourism industry, etc

Tourism planning is equally important, whereas only a minority of African countries has adopted Tourism Master Plans, and even fewer of them entail poverty issues. Tourism would develop sustainably only if its complex needs and impacts are embedded into countries' policies and economic and physical planning frameworks.

● Extending participation

Local communities are frequently the first to experience the positive and negative impacts of tourism: their active involvement in tourism is compulsory if its benefits and costs are to be equally shared by all. A true participatory approach is highly recommended on the basis of the promising results produced in various developing countries. Besides, the donor community has to be sensitized about the potentialities for development of tourism.

To achieve these goals, successful pilot projects and national tourism programmes centered on the poor are critical.

● Public-private partnership.

Public-private partnerships have already demonstrated their commercial viability as long as their relevance in development terms (e.g. CPPP programmes in South Africa). Principally where the poor have difficulties to access the tourism market, as in remote and rural areas, governments are bound to play a vital role as a trait d'union between the private sector and the local communities in promoting self-benefiting partnerships in tourism.

● Introduction of tourism standards and guidelines.

Standards range from a great variety of documents. To name some: codes of conduct, such as the WTO's Global Codes of Ethics for Tourism for the safety and security of tourists and to promote sustainable tourism development in the region; principles, like UNEP's Principles on Implementation of Sustainable Tourism, which addresses governments to integrate sustainable tourism into national development strategies; award schemes and certification, like WTTC's Green Globe and ISO 14001, for the safeguard of environmental and cultural resources; benchmarks, like DEAT's Responsible Tourism Guidelines, which invite companies to develop tourism management plan that entail social, economic, and environmental issues.

Some of these standards are widely in place, other for the most part have not been implemented. Further, poverty concerns have been largely left out: beyond employment and participation, other significant issues for the poor, like infrastructure development, require being included (see Roe et al, 2003).

● Fostering domestic tourism.

Domestic tourism is often overseen, despite case studies show that has a greater impact on the informal sector, hence on the poor, than international tourism.

● Gender sensitive programmes.

Women are among the poorest. The tourism industry employs a higher percentage of women than many other sectors, but not always jobs accessible by women are of the same standards than men's. Gender sensitive programmes must be implemented at national and local level.

● Facilitating market access for the poor.

Lack of business skills, low educational levels, scarce access to financial resources, demanding regulations, inexistence of facilities, incapacity to exit deep poverty situations, poor health conditions, political instability, social exclusion, are just some of the reasons why poor have not access to the tourism market.

● Poverty goals in tourism policy.

Poverty needs to find a stable place in each country's Statement of Tourism Development objectives, followed by feasible implementation strategies.

These barriers are not always easily torn down, but governments' function is decisive to move some steps forward towards a more equitable participation in tourism by all the stakeholders involved.

Let's not forget though, that the role of governments is that of facilitator: the tourism sector must be government led, private sector driven and locally oriented.

Using the framework offered by NEPAD and the existing, and hopefully strengthened, national and regional tourism bodies, regional cooperation in tourism may provide some solutions for the problems suffered by African tourism, both enhancing the role of the private sector and the effective involvement of governments and, most of all, truly benefiting the poor. Regional cooperation in tourism is a vital step to speed up the regional economic integration process in Africa but also to increase the competitiveness and visibility of African tourism abroad and better exploit the potentialities of regional and domestic tourism (see Box.2).

Indirectly, the poor would benefit from some of the following initiatives:

● Joint promotion and marketing strategy.

The Caribbean Tourism Organization (CTO) represents a successful case of joint regional promotion and marketing of tourism. Joint promotion helps to integrate resources in activities such as: identification of tourism wholesalers, use of regional marketing mix strategies to identify tourism niches, negotiations with tourist operators (with increasing market power), access to Computerized Reservation Systems (CRS), knowledge sharing on weaknesses and strengths of national distribution sectors (setting up a regional information system), promotion of multideestination tourism products, etc.

● Development of multiple tourism destination programs

To face, especially for long haul markets as the Africans' (except Northern Africa), the increasing requests by international tourists of different, combined, tourism products. Among the most successful destinations in Africa are those that have been able to depict themselves as multideestination countries capable of offering different typologies of tourism products, from beach resort to safari, combining natural and cultural features, adventure with relax in idyllic locations. Statistics show that nowadays many of the tourists who visit Africa tend to go for a "holiday mix": for instance in Kenya, where safaris in the Masaai Mara are followed by few days of rest in Mombasa; or in Tanzania, where a trip that starts in Serengeti and Ngorongoro often finishes in Zanzibar; or a journey from the Atlas Mountain, through the desert, ending on the beaches of Morocco. Where a country is not endowed with such a variety of distinctive locations, regional cooperation may come to rescue.

Today visa formalities, border hitches, scarce collaboration between governments, poor national tourism boards, lack of planning, create an insurmountable obstacle. Tomorrow we can envisage to see regional tourism bodies coordinate and facilitate intra-regional tourism, particularly between landlocked countries and those that have open access to sea. For example: Zimbabwe and Mozambique; DRC with Angola; Mali with Senegal. What is important is the product mix and the marketing strategy behind it.

● Conservation and preservation programs for natural and cultural resources.

The Okavango Upper Zambezi International Tourism Spatial Development Initiative (OUZIT) is an integrated tourism development strategy aimed at establishing a comprehensive tourism and resource development zone in SADC (SADC, 2001).

Box 5
Regional Tourism Cooperation in Southern Africa

● **Regional tourism development planning**

The 14 countries that form SADC have adopted since 1995 a regional approach to tourism development. Two main bodies compose the organizational structure: the Tourism Coordination Unit (TCU), based in Mauritius and responsible for the overall coordination of tourism development in SADC, and the Regional Tourism Organization of Southern Africa (RETOSA). Main aims of RETOSA are:

- To market and promote the SADC region in partnership with the public and private sectors of the Member states, together with the respective national tourism organizations.
- To facilitate, encourage and assist in the development of tourism in the region.
- To support the involvement of communities, in particular rural communities, in tourism activities.

Some of the main projects under study or implementation are:

- UNIVISA System, a common visa for all SADC countries. Due to some misunderstandings on the issue of visa exemption and UNIVISA, a new project proposal is being prepared.
- OUZIT. OUZIT is expected to create that critical mass, in terms of demands and volumes, for transport services and tourism and park facilities that would justify and attract investment in the area, mostly in air transport and related logistics services.
- NEPAD. NEPAD “represents an interesting opportunity to come up with appropriate project proposals in tourism...” (SADC,2002). A working paper on NEPAD has been commissioned.
- Development of Cruise tourism in SADC.
- Special WTO Programme for SSA.
- Global Code of Ethics for Tourism
- GATS – Trade in Tourism Services

Despite the promises, RETOSA has partially failed the expectations, mainly to market the region’s attractive tourism product. In 2002 it survived an attempt from SADC Council of Ministers to dissolve it that instead turned into a revival of its mandate. NEPAD and some key anchor projects, like OUZIT, were indicated as important opportunities to revive RETOSA and make it more responsive to regional needs in promoting tourism.

Includes physical and programme development of attractions, service facilities, transportation, promotion-information for tourists (Gunn, 2002).

- Tourism facilitation

For instance, on customs and visa issues and currency regulation. The UNIVISA System in the SADC region envisages a common visa for all SADC Members (not implemented yet) to ease border controls on tourists.

- Common transportation system policies

E.g. regional air transport policies in the Greater Mekong subregion in Asia, improve the connections between countries in the area and increase the multidimension of the tourism product of the region (ESCAP, 2001).

- Regional standards and classifications of tourism facilities

E.g. WTO Hotel classification standards for Africa and WTO Interregional harmonization of hotel classification criteria.

- Enhancing cultural and economic understanding

Through the increasing of international contacts and exchanges, both at a tourist, corporate and government level.

Conclusions

The main quest of this paper was to provide some elements to support or discard the use of tourism for pro-poor growth policies and strategies in Africa.

An analysis of the industry, several case studies, a critical presentation of relevant definitions and approaches, and some tentative suggestions, have been taken into consideration to try to find a sound answer.

The answer is a conditional “yes”: the tourism sector has some features that raise considerable hope about the positive results that it could produce in terms of poverty reduction if steadily put on African states’ development agenda, with the support of their development partners, and an active role of the private sector. Results to a certain extent already verified and acknowledged on the field.

But conditionality is of rigor.

Firstly, because tourism development is fraught with problems partially unresolved: constraints that developing countries encounter when they want to participate in the travel and leisure market (lack of infrastructures and skills, verticalization of the industry, high leakages and low linkages); problems inherent to the nature of the industry itself (dependency on originating countries, change of trends, seasonality); impacts caused by tourism activities in destination regions (environmental, social, and economic impacts).

Secondly, because the pro-poor tourism approach, or if you want, the inclusion of tourism within those sectors prioritized in national development policies for poverty reduction purposes, apart from rare exceptions has not been tested yet other than at a local level. In terms of policy and strategy, the road ahead is still long and not deprived of obstacles.

Nevertheless, there are signs that induce optimism and call for a strengthening of the efforts in favor of tourism.

The tourism industry is in constant growth in developing countries, being less volatile and with fewer barriers to entry than once thought; tourism is labor-intensive, it employs more women than traditional sectors; it largely involves the informal sector, and it is present in rural and remote areas where poverty is more eradicated. Most of all: tourism is built on natural and cultural assets owned by the poor.

Recently, the work done on tourism and poverty by some institutions like DFID, WTO/OMT, UNCTAD, World Bank, ESCAP, the South African DEAT, and others, in terms of elaboration of documents, field projects, and implementation of policies, has produced evidence that seems to confirm it.

Of the possible channels to advocate this role for tourism in Africa, NEPAD holds a privileged position due to its current prominence in the development discourse, and for the impact that NEPAD can have at regional level, in a continent where tourism flows are highly regionalized and tourism resources need to be shared between countries if better results are to be achieved.

Appendix I

The Impact of Tourism on World Economy

Travel and tourism is one of the fast growing industries in the world, with an average growth rate of inbound tourism between 1985-1995 of 5.6% and of 3.4% between 1995-2000, and an estimated growth for the next two decades, 2000-2020, of 4.3% (WTO). International tourism receipts touched US\$463 billion in 2001 (WTO, 2002), and the World Travel and Tourism Industry (WTTC) forecast that in 2003 the total impact of Travel and Tourism Industry (T&T Industry) on global economy will be of US\$1,280 billion, equivalent to 3.7% of total GDP, and will produce more than 67 million jobs, representing 2.6% of total Employment. If we take into consideration the Travel and Tourism Economy (T&T Economy⁴), the impact on world economy grows considerably (see box 1; WTTC, 2003). Some of these data should be treated carefully to both avoid self-praising from the industry itself and easy miscalculation of the real impact on the economy due to the multi-sectoral nature of tourism.

International tourist arrivals, which in 2001 were recorded in around 692 million units, are forecasted to grow up to 1 billion in 2010, and above 1.5 billion in 2020 (WTO, 2002). Unfortunately the majority of the statistics excludes domestic tourism, even though domestic arrivals highly exceed international flows.

Box 6

WTTC Forecasts For The Tourism Economy

- 194 million jobs in 2003, representing 7.6% of total Employment, which by 2013 should rise to 247 million jobs, or 8.4% of total employment. Annualized real growth rate for next decade: 2.2%.
- US\$3,526 billion of GDP, equivalent to 10.2 of total GDP (forecasted to be 10.8% of GDP in 2013). Annualized real growth rate '03-'13: 3.6%.
- US\$1,009.9 billion of exports, services and merchandise, or 11.2% of total Exports (11.4% in 2013).
- US\$686 billion of Capital Investment, or 9.6% of total investment (10.1% in 2013). Annualized real growth rate '03-'13: 4.3%.
- US\$224 billion of Government Expenditures, or 3.9% share.

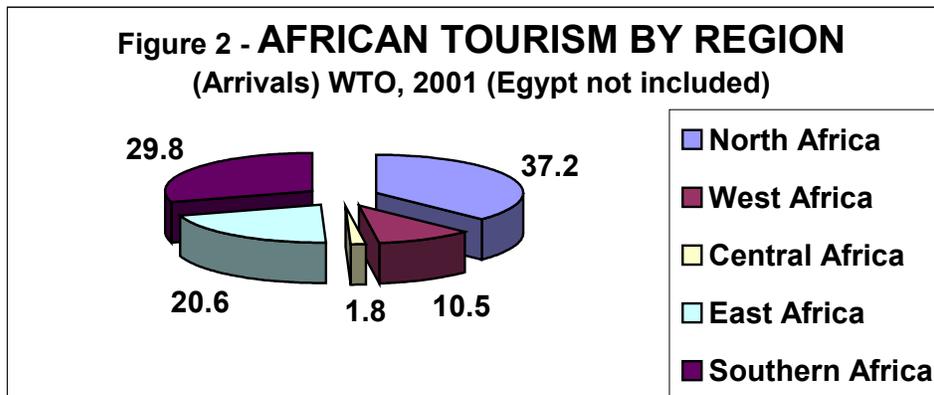
Source: WTTC.

⁴ Travel and Tourism Industry: "all the establishments whose principal productive activity is a tourism characteristic productive activity" (System of Tourism Statistics, WTO/OMT), that include a wide range of activities, such as hotels and restaurants, travel agencies and tour operators, transport services (air, road, water and railway), cultural, sport and recreational services. While Travel and Tourism Industry captures the explicitly defined production-side 'industry' equivalent, direct impact only, for comparison with other industries, the Travel and Tourism Economy captures the broader 'economy-wide' impact, direct and indirect, including also industry suppliers, government agencies, manufacturing and construction of capital goods and exported goods used in T&T, and supplied commodities.

The industry has suffered some setbacks in the last couple of years, slowing down its growth pace. The great exploit of 2000 (+6.8% in international arrivals) and the already deteriorating economic conditions in the major economies, contributed to produce these figures. The main factor though, has been the consequences on international travel of the September 11 terrorist attack in New York and more recently of the war in Iraq. Albeit the data on the impact of the latter conflict are not yet available, tourism has proved to be quite a resilient economy: international tourist arrivals, after falling by 0.5% in 2001, quickly resumed to a 3% growth in 2002.

Appendix II

The characteristics of tourism in Africa



International tourism in Africa is characterized by a strong polarization, with the northwestern and southeastern countries receiving the greater part of the arrivals (see Tab.11). Three countries alone, South Africa, Morocco and Tunisia, account for 54.63% (WTO, 2001) of all the arrivals in the region; if Egypt is added to the lot (usually in statistics falling into the Middle East region), the percentage raise to 60.66%.

Tab.11 TOURISM IN AFRICA: Receipts and growth								
	International Tourism Receipts (US\$ billion)			World Market Share % (Receipts)		Growth Rate %		Receipts Annual Growth Rate % '00/'95
	1995	2000	2001	1995	2001	00/'99	01/'00	00/'95
AFRICA	8.1	10.8	11.7	2.0	2.5	2.7	8.8	5.9
North Africa	2.7	3.7	4.2	0.7	0.9	3.6	15.6	5.9
West Africa	0.7	1.1	1.2	0.2		1.8	12.7	8.4
Central Africa	0.1	0.1		0.0		0.0		6.6
Eastern Africa	1.9	2.6	2.7	0.5	0.6	-0.3	6.1	5.9
Southern Africa	2.6	3.4		0.6		4.6		5.0

Source: WTO, 2002

Approximately 95% of all arrivals are concentrated in 20 of the 53 African countries.

As for the originating markets, the greatest numbers of international tourists are intraregional: in 2001 Africans counted for 40% of all international tourist arrivals in the continent, followed by Europe (36%), by far the first market of reference outside the continent, Middle East (4%), Americas (4%), and Asia and the Pacific (3%; not specified, 13%) (WTO, 2002b). If we include domestic tourism, 75% of all arrivals are generated within Africa; the scale of domestic tourism in Africa is one important and often overlooked feature. One of the potentialities of African tourism is to develop sustainable flows through increased expenditure per tourist, rather than increasing volume of tourism flows. Domestic and intraregional tourism generally creates a low-spending tourist and hence interregional tourism is the target market for the African states.

For example, Zimbabwe has 67% of arrivals coming from within Africa and 33% from outside, earning an average of US\$ 67 per person; in Mauritius on the contrary, only 25% of tourists come from Africa, while 67% are affluent Europeans, whom, as an average per person, spend US\$ 947.

The tourism product

Roughly 60% of international tourists who visit Africa are leisure tourists (holidays, leisure and recreation), 15% are business tourists and 25% come for visiting relatives, religious purposes, health, or other reasons (classified as “other purpose of visit”).

The main tourism products in Africa, despite there are not precise statistics on the matter, are:

- Resort tourism: sun, sea and sand are the assets that attract the highest numbers of tourists. Leading regions are Northern Africa and the Indian Ocean Islands (Mauritius and Seychelles above all).
- Adventure tourism: wildlife tourism is one of the oldest typologies of tourism in the continent (once only in the form of safaris). This niche, although profitable, has become a mature product, forcing the tourist operators to redirect towards other niches within adventure tourism that today are in the rise, such as diving, trekking, extreme sports, etc. Leading regions are Eastern and Southern Africa.
- Business tourism: it is in constant growth, 7.3% in the decade '90-'00. It represents a feasible option where infrastructures like convention centers and IT services have been created and major events/fairs hosted, because in average business tourists are bigger spenders than other kinds of visitors. Morocco for instance, has invested in this direction, hosting several cultural festivals and events; in Ethiopia, where Addis Ababa is home of many embassies and development organizations, nearly half of the tourists come for business purposes.

-
- Cultural tourism: despite having a long tradition in Africa (e.g. in Egypt), today cultural tourism represents a choice for a raising number of countries: for its potential as a small scale community based tourism experience that distribute costs and benefits of tourism among the various stakeholders in a more equitably manner; for its reliance on existing domestic assets as key factors on which build to create a real comparative advantage, through the production and marketing of distinctive, authentic products; for the capacity of generating financial resources for cultural heritage protection.
 - Eco-tourism: it is the fastest growing tourism product in the world, and Africa, for its natural endowments, constitutes an obvious destination, as in countries like Uganda, Rwanda, Tanzania, and Kenya.
 - Cruise tourism: in constant growth (around 9 million tourists worldwide in 2000; WTO). According to SADC RETOSA, the Indian Ocean represents a potential area of expansion for this niche.
 - “African roots” tourism: increasing numbers of Africans living abroad are returning home for holidays, visiting relatives and discovering their roots. A potential huge market for the years to come is that of Afro-Americans keen to visit their native countries (Africa Travel Association).

The tourism industry in Africa

The tourism industry in Africa is characterized by a large number of small and medium-sized tourism enterprises (SMEs) that in many cases lack the financial and human resources necessary to provide a qualitative product. In a considerable number of countries, though, few foreign companies, such as hotel groups and vertically integrated tour operators, control the international tourism market: e.g. in The Gambia, where 41.1% of tourists come from the UK and are in the hands and judgment of UK based tour operators (Goodwin and Bah, 2003).

The dilemma lies between opening national markets to foreign operators or restricting the activities of the latter in favor of national companies. Overall, if we consider the commitments undertaken by African countries in tourism under the General Agreement on Trade in Services (GATS), the sector is fairly liberalized: 39 out of 41 African WTO Members have made commitments; nonetheless only 7 have committed in all the four tourism sub-sectors and 13 in three subsectors, leaving significant room for manoeuvre in the current negotiations.

Box 7
Tourism in Africa and the Multilateral Trading System

Both in market access – that guarantee a certain level of access to domestic market for foreign companies – and national treatment – that, in services, guarantee an equal treatment for nationals and foreigners, specific commitments have been taken.

The Modes of Supply under which trade in services are classified are:

- Cross-border supply (CBS) (e.g. internet booking of tourism holiday on a foreign operator website);
- Consumption abroad (CA) (e.g. the consumption of tourism services by foreign tourists, from restaurants to accommodation and so on);
- Commercial presence (CP) (when tourism services are provided by foreign firms, such as hotel chains, established in the country);
- Presence of Natural Persons (PNP) (e.g. services provided by foreign tourism consultants or foreign workers).

The assumption is that a higher level of liberalization should lead to greater tourism receipts (see Box.1). That seems to be the case of Southern African countries. Nevertheless, the level of commitments by region is not always consistent with the total tourism receipts. In West Africa, for instance, the high liberalization of the tourism sector does not reflect the scarce receipts received by international tourists. Some of the reasons could be addressed to various causes, such as: the scarce tourism marketing that the region enjoys, compared to others, like Eastern or Southern African destinations; the social and political instability in some of its countries (e.g. Sierra Leone); the high rate of leakage that some tourist products imply, like charter operations, as those sold in Gambia, where leakage of up to 77% was estimated (Mowforth and Munt, 1999); the severe lack of infrastructures and tourism superstructures in West Africa; a poor regulatory frameworks for investments; and more in general, the widespread poverty in most of these countries: Cote D'Ivoire, Senegal, Benin, Gambia, Guinea, Mali, Guinea-Bissau, Burkina Faso, Niger and Sierra Leone, fall among the 20 poorest countries in the world (Human Development Index; UNDP, 2001).

The liberalization of the tourism sector is not an automatic receipt for success in the sector, while instead a necessary precondition for fostering tourism development.

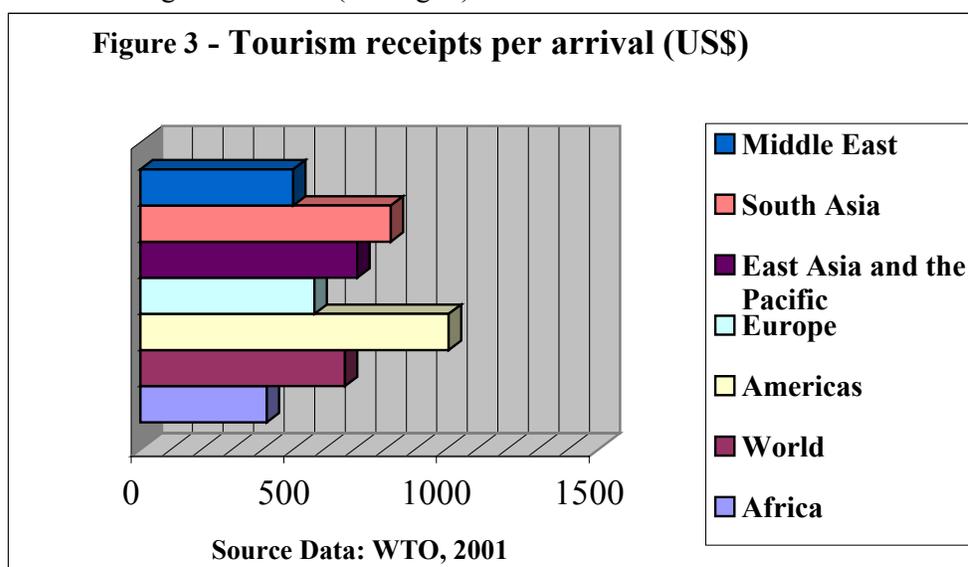
Source: Gauci, Gerosa and Mwalwanda, UNECA study (2002).

However, the presence of foreign operators is essential to guarantee adequate inflows of resources through FDI, for enhancing the quality of tourism products offered, and for giving African destinations a chance to get a light spot in the global tourism market, as the experience in Northern Africa shows.

African Tourism Performance

Arrivals and Receipts

Between 1990 and 2000 tourism in Africa has grown at an annual rate of 6.2%, well above the world average of 4.3%. In 2001, tourism receipts totaled US\$ 11.7 billion. Still, this represents only a mere 2.5% of global tourism receipts, where the arrivals total 4% of world inbound tourism; these figures show the marginal position of Africa in the global tourism market, and also the lowest income per tourist of all world regions, US\$414 against a world average of US\$670 (see Fig. 3)



9/11

2001 has been a difficult year for tourism, although less than expected, with a decrease in receipts at a world level of 2.6% and 0.6% in arrivals. The great exploit of the previous record year and the already deteriorating economic conditions in the major economies, contributed to produce these figures. The main factor though, was the consequences on international travel of the September 11 terrorist attack in New York. Nevertheless, Africa's performance has been substantial with an 8.1% growth in arrivals in the first eight months of the year, partly counterbalanced by a 3.5% decrease in the last four months of 2001. Overall, arrivals grew 4.3% and receipts 8.8%.

The reasons of this performance are multifold:

-
- Africa's overall GDP is estimated to have increased to 4.3% in 2001 (ECA, 2002); that had a positive effect on the very important flows of intraregional tourism.
 - Less dependency from interregional markets than other regions; Northern African countries are the ones that suffered the highest number of cancellations because of their limited intraregional traffic (less than 10% of total), but they quickly resumed normal levels.
 - Ability of tourism sector to recover from external shocks.

Nevertheless, terrorism, probably as much as internal conflicts and political unrest, can constitute a serious problems for the years to come. In the last decades Africa has already suffered from "bad publicity" transmitted from one country to the others, up to a point where a problem in one specific state caused a drop in tourist arrivals in the entire region or the whole continent. The risk today is a form of "pre-emptive warnings", as we have been experiencing in Kenya today after the second war in Iraq, where Western countries' Foreign Offices advised their citizens to avoid a destination considered under the threat of a terrorist attack. It is also true that after 9/11 some African countries, like South Africa, look safer if compared to other destinations, such as in the Middle East or in Asia.

Constraints and problems that affect African tourism development

Many are the problems that constraint African tourism development.

● Lack of Infrastructures

Inadequate infrastructures are one of the biggest constraints for tourism growth in developing countries. These can be general infrastructures, such as transportation, water supply, energy, waste disposal, telecommunication, or tourist typical facilities, like accommodation, restaurants, tourist offices, and tertiary tourist facilities, like health, financial and emergency services. Lack of financial resources and poor institutional and domestic frameworks are among the main factors that affect infrastructure development. However, it is essential to say that infrastructure development can vary according to the kind of tourism development – beach resort tourism requires more infrastructures than trekking tours – and the national policy objectives of a country (that are in turn interrelated with its level of development).

Most African countries lack those necessary infrastructures, in particular transports (to guarantee the access to the destination, but also to reduce costs and keep a destination competitive on the international markets), health services (to guarantee the safety of tourists), telecommunications (to market the tourism products), general services (water supply, waste treatment, and power; to guarantee tourists' basic needs) and education services (to train local people).

For what concerned tourism sovrastuctures, several countries have increased their tourism capacity in 2001, like Angola, Ghana, Mozambique, Mauritius, Seychelles, Guinea, and Chad (WTO, 2002). But overall, accommodation infrastructures need to be upgraded in numbers and quality. The problems here are related to: the lack of financial resources; the characteristic of African tourism that is low in volume and scattered on a vast territory, making difficult to justify large investments such as big hotels; the presence, although decreasing, of government owned hotels, inefficient and poorly managed; an inadequate regulatory framework for land ownership, titling and zoning policies, creating problems for possible investors; scarce ad hoc programs for subsidizing tourism development; poorly trained personnel, in particular managers.

● **Air Transport**

Air transport accounts for 51% of total arrivals to Africa (WTO, 2000), outpacing roads (37%), water (7.3%), and rail (less than 1%).

Air transport is to a great deal regulated by bilateral agreements between states that hardly want to renegotiate them in favor of open sky agreements that would allow both national and foreign competition, questioning the monopoly position of national flagships, as it is the case in few African states. The majority of African states, though, don't have national airlines that can compete in the international arena – few exceptions are South African, Kenyan and Ethiopian airlines – or don't have any at all.

As a consequence, when the presence of foreign airlines is allowed, they often benefit from an oligopolistic position, which creates inefficiency in the sector, through high fares, insufficient numbers of scheduled flights, limited coverage of national territories and a dominant contractual position that allows them to take arbitrary decisions that can affect badly the destination country: the latest example is the interruption of British Airways and Lufthansa flights to Nairobi due to terrorist alerts. The direct effects on tourism are higher prices to reach the African destinations compared to competing regions, such as South Asia and the Caribbean, as well as the exclusion of some destinations from the main tourist routes because not considered attractive in terms of volumes and profits. The regions more affected are Western and Central Africa (one recent, significant case, being the bankruptcy of Air Afrique), but the current international affairs constitute a threat especially for Eastern Africa.

● **Health, safety and security issues**

Political instability and safety issues are some of the principal causes for the marginal share of tourism owned by developing countries, and LDCs more specifically. Civil wars in D.R.C., Angola, Sierra Leone and Sudan; political unrest in Zimbabwe; ethnic clashes in Rwanda and Burundi; full fledged war between Ethiopia and Eritrea; dictatorial regimes in Myanmar and Afghanistan; kidnapping of tourists in Yemen; and currently the negative effects of terrorism, all have affected inbound tourism.

Africa lacks also the necessary health infrastructures and hygiene standards required from international visitors; besides, it is home of some endemic diseases, situation worsen by the spreading of the HIV infection throughout the continent. If some typologies of tourists, like backpackers or adventure tourists, are not too deterred by the scarcity of health services, it is undeniable that others, such as resort tourists or middle-aged cultural tourists, often prefer to opt for destinations that can offer those kind of facilities.

● **Lack of financial resources**

Has seen for accommodation and infrastructures services, national financial sectors are usually unable to provide the necessary resources for tourism development. It is not only a problem of availability of funds but also of adequacy to the specific financial needs of the tourism sector, which are strictly related to factors such as seasonality and longer times for investment returns than in other industries. Yet based on a study of 46 hotel projects, by the International Finance Corporation, the economic rate of return has tended to be approximately 60% higher than the financial rate of return because of the multiplier effect, also called “flow-through” effect, of tourism on ancillary activities.

FDI represent a critical font of financial resources for tourism. Although the sector is more liberalized than others, poor domestic regulatory frameworks, as mentioned before, may increase the costs and obstacles for investing in Africa, sometimes penalizing the foreign participation in tourism projects. Property rights and land titling regulations are pre-requisite to attract large investors (World Bank, 2001).

Foreign investors perceive the risk to set up tourism activities in Africa higher than other regions in the world, for many reasons: political instability, inadequate business environment, limited size of domestic markets, cultural factors, lack of infrastructures, lack of tourism policies and planning, scarce promotion of African tourism abroad, poor image abroad (Brown, 2000).

Donors’ financial contribution to African tourism is only marginal, compared to other sectors but also regions, as for instance in Central and South America where the Inter American Development Bank (IDB) and the Inter American Investment Corporation (part of IDB Group) have invested more than US\$ 1 billion in tourism projects since the 70s. In Africa, international development assistance in tourism has mainly come from the World Bank Group through the Multilateral Investment Guarantee Agency (MIGA; e.g. in Tanzania) and the International Finance Corporation (IFC; e.g. in South Africa, Tanzania and Botswana), the UK Department for International Development (DFID; e.g. in South Africa and Namibia), the European Union (EU; e.g. in Kenya), SNV (the Netherlands Development Organization; e.g. in Uganda, Tanzania, Botswana, Cameroon, Niger, and Benin) the German GTZ (the German Technical Cooperation Agency; e.g. in Central African Republic and Tanzania), the United

States Agency for International Development (USAID; e.g. in Ghana and Southern Africa, Greater Limpopo Region), NORAD (the Norwegian Agency for Development Cooperation; e.g. in West Africa with the Slave Route project) and United Nations Development Programme (UNDP; e.g. in South Africa, Malawi and Ghana).

❶ **Poor Marketing, Promotion and Research capacity in Tourism**

Marketing and promotion of tourism must become a major part of national policies and planning activities. Very few African countries are properly promoted abroad: Egypt, Kenya, Tunisia, Morocco, South Africa, Mauritius and Seychelles are some of the exceptions. Marketing African tourism does not only mean being present on the right promotion circuits in Europe or Northern America, something that most of the time African destinations lack, but also to possess a research capacity in tourism that would allow a correct targeting of potential tourists, a right positioning amid the various tourism niches, and the proper use of the most effective promotion means.

Box 8

Tourism Satellite Account-A Methodological necessity

The United Nations in 1993 called on countries to develop a National satellite account to provide a credible measure of tourism's contribution to a national economy. The fundamental structure of the TSA is based on the general balance existing within an economy between the demand of goods and services generated by tourism and their supply.

Thus the TSA can provide:

- Macroeconomic aggregates to describe the size and economic importance of tourism;
- Detailed production accounts of the tourism industries;
- Basic information required for the development of models of the economic impact of tourism.

The benefits accruing to users of TSA is the computation of flow-through effects and the detailed data necessary for planning purposes. Its utility for African countries cannot be underemphasized if tourism has to be developed further, not as an ad-hoc economic activity but as an economic activity in its own right.

Source: OECD,2001 "Towards Satellite Account: Recommended Methodological Framework"

Some outdated research, management and promotional practices need to be reviewed, and new ones taken on board, such as the use of internet promotion, a higher participation in fairs and exhibitions, and the adoption of the Tourism Satellite Account, as only Egypt, Tunisia, Morocco and Seychelles have so far been doing albeit at different stages of implementation.

❶ **Poor quality of the tourism services**

One of the prime reasons of complaints from international tourists visiting Africa is the poor quality of tourism services.

The low level of general education and the lack of training facilities specific for the tourism sector, contribute to produce skill shortages, notwithstanding the abundance of labor force. Expatriates often cover most of the managerial positions in tourism, contributing to increase income leakage (UNCTAD and WTO, 2001). Besides, the scarce confidence with western business practices and tourists' needs negatively affect the quality of tourism services, reducing the competitiveness of the destination.

On one side, it is compulsory to introduce best practices and common principles in satisfying quality standards, taking into account not only the market requirements (what the customers want), but also cultural issues (national practices and way of life of each destination) (Dowell, 2000).

❷ **Leakages and linkages**

Reduce the leakages of profits outside African states and increase the linkages with the local economy must be an imperative priority for African policy makers to increment the positive impact that tourism can have on economic growth.

In many African countries local players are scarcely involved in the tourism production and distribution processes, limiting their activities only to one or two activities and not to the whole process. Growing levels of leakage have been registered in Uganda, Burkina Faso, Sierra Leone, Madagascar and Sao Tome and Principe (UNCTAD, 2001). Leakages can be managed through ad hoc leakage policies that take into account a country's economic possibilities and best tourism options.

Promoting intersectoral linkages, on one side would increase the multiplier effect of tourism on the economy, and on the other would reduce the leakages. Unfortunately, the economies of most developing countries suffer from supply constraints and scarce diversification that limit tourism activities and/or force tourist operators to import goods and outsource services from outside of the country.

The development of strong linkages with the local economy, both formal and informal sectors, small to large scale, would enhance the benefits retained locally.

❸ **Protection of the resource basis**

The natural and cultural resource basis, on which African tourism thrives, needs to be safeguarded. A growing number of countries are introducing ecotourism policies, certifications

and labeling systems to safeguard their natural resources (Morocco, Ghana, Senegal, Angola, Ethiopia, Kenya, Tanzania, Namibia, South Africa) and several others now actively promote “green” tourism. Local populations must be more and more involved in the tourism activity, both making them part of the economic benefits of tourism, as with the Zimbabwean CAMPFIRE and the Namibian NACOBTA programs, and protecting their traditions and lifestyles, such as in Uganda with the Heritage Trails Initiative (DFID, 2003) and in Kenya with the Masaai (Berger, 1996).

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