Economic Commission for Africa
Sub-Regional Office for Eastern Africa (SRO-EA)

Ecotourism in the Intergovernmental Authority on Development (IGAD) Region

An untapped potential with considerable Socio-economic opportunities

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Disclaimer
This report is the result of the analysis of a study commissioned by the United Nations Economic Commission for Africa, Eastern Africa Sub-region Office (UNECASRO-EA) . However, the report does not purport to represent the views or the official policy of the institution or of any SRO-EA member country.

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Acknowledgements

Acronyms

AU	African Union
AUTO	Association of Uganda Tour Operators
EAC	East African Community
EAE	Ecotourism Association of Ethiopia
EK	Ecotourism Kenya
IGAD	Intergovernmental Authority on Development
IYE	International Year of Ecotourism
KATO	Kenya Association of Tour Operators
KECOBAT	Kenya Community Based Tourism
EWCA	Ethiopian Wildlife Conservation Authority
KWS	Kenya Wildlife Services
NEPAD	New Partnership for Africa's Development
NFA	National Forest Authority
ON TD	National Office of Tourism
RECs	Regional Economic Communities
RETOSA	Regional Tourism Organisation of Southern Africa
SADC	Southern African Development Community
TESFA	Tourism in Ethiopia for Sustainable Future Alternatives
UCOTA	Uganda Community Based Tourism Association
UNWTO	United Nations World Tourism Organisation
UTA	Uganda Tourism Association
UWA	Uganda Wildlife Authority

Executive Summary

Ecotourism is an important and rapidly growing "niche market" within the global tourism industry, which offers an opportunity to develop products that can contribute to national environmental conservation, socio-economic and cultural objectives by providing livelihoods for local communities and giving value to the maintenance of local traditions and culture. Intergovernmental Authority on Development (IGAD) member states comprising of Djibouti, Eritrea, Ethiopia, Kenya, Somalia, Sudan and Uganda have supported tourism development and ecotourism is slowly but steadily developing in most member countries.

Given the vast natural, cultural and historical resources in the IGAD region, this study was commissioned by the Sub-regional Office for Eastern Africa (SRO-EA) of the United Nations Economic Commission for Africa (UNECA) to assess the level of ecotourism development in the region and identify how the existing opportunities can be harnessed to attain increased socio-economic development among member states.

Ecotourism, though still a relatively new phenomenon in the IGAD region, is increasingly being recognised by member states as a viable approach for attaining sustainable tourism development. Kenya, Uganda and Ethiopia have undertaken a number of initiatives to promote and strengthen the application of ecotourism principles in the various sections of the tourism industry through private sector and civil society initiatives. The growth of ecotourism is however constrained by limited community involvement, market penetration by tourism operators, product development, financial incentives, a weak policy, legal and regulatory framework and increased environmental degradation.

Despite the above constraints, there are numerous opportunities that can be exploited to enable ecotourism flourish such as unexploited resources that can help diversify ecotourism products, increasing macro and micro economic stability, improving peace and security, and existence of regional bodies such as the African Union (AU), NEPAD, UNECA and IGAD that offer a strong foundation and opportunity to advocate, promote and solicit funding for ecotourism development. However, these opportunities can only be realized if there is strong government support and incentives provided for ecotourism development, peace and security, community and private sector awareness and involvement.

An outline for the formulation of a Tourism Master Plan (TMP) for the IGAD region with ecotourism component has been proposed, highlighting a number of strategic interventions and actions for the development of ecotourism in the region.

1.0 Background to the study

1.1 Objectives of the study

The *Intergovernmental Authority on Development* (IGAD), comprising Djibouti, Eritrea, Ethiopia, Kenya, Somalia, Sudan and Uganda, is one of the recognized eight major Regional Economic Communities (RECs). IGAD Member States are at the low end in tourism development, but the countries have a huge potential for development of ecotourism both singularly and collectively. A number of African countries have developed Tourism Master Plans, with the assistance of the World Tourism Organization (WTO) and development partners, with the view to harnessing the potential presented by the tourism industry, including ecotourism. In 2004, the Tourism Action Plan for the AU/ NEPAD was developed. The objective of the Action Plan is to optimize the role of tourism as an engine and catalyst for economic growth and development in Africa by creating an enabling environment, regional cooperation and advocacy. Recognizing that different RECs and countries in Africa are at different stages of developing their tourism industry, the Action Plan is meant to galvanize national and regional action. Hence, the need and urgency for the IGAD Secretariat to develop a regional IGAD Sustainable Tourism Master Plan drawing from the AU/NEPAD Tourism Master Plan.

The Sub-Regional Office for Eastern Africa (SRO-EA) of the United Nations Economic Commission for Africa (UNECA) commissioned this study as a contribution to IGAD's Secretariat's effort to develop a Tourism Master Plan for the region. The study assessed the level of ecotourism development in the region and identified how the existing opportunities can be realized to attain increased socio-economic development among member states considering their wealth of cultural and natural heritage and resources.

The findings of this study include:

(a) A snap shot on the ecotourism sub-sector in the IGAD region including its levels of contribution to GDP, employment generation, environmental protection, and human and social capital creation;

(b) A growth diagnostics of the sector including an assessment of the constraints to growth (institutions, skills base, infrastructure stock, policy and legal and regulatory framework, financial, market penetration, location, product offer and diversification, name and recognition, competitiveness and level of resilience to external shocks, etc.) and an identification of the imperatives for growth, listing of growth drivers and analysis of (new) opportunities for growth; and finally;

(c) The way forward with policies and strategies design, reform agenda, and a prioritized and targeted framework for action informed by case studies and good practices.

Using a wide range of approaches and methodologies (Appendix 1), the study is articulated as follows:

1. Reviewed literature on ecotourism development, the definition of ecotourism, its difference with other forms of tourism and its contribution to development.
2. Overview of the IGAD region and characteristics of the nature of the tourism industry in the region.
3. The status of ecotourism for individual member states accompanied by a SWOT analysis.
4. Analysis of the constraints to the growth of the ecotourism in the IGAD region.
5. Identification of the opportunities and growth drivers for the development of ecotourism.
6. Recommendations and proposed way forward for development of ecotourism.

1.2 Overview of global tourism development

Tourism is globally recognized as one of the sectors with the greatest potential to contribute to economic development. Over the years, an increasing number of destinations have opened up coupled with an increase in investments in the sector. As a result, tourism has become a key driver for socio-economic progress through the creation and increase of jobs, enterprises, infrastructure development and export revenue earnings. According to the United Nations World Tourism Organization (UNWTO 2010), tourism has become one of the major global export trade categories, ranking fourth after fuels, chemicals and automotive products. In 2009, export income from inbound tourism generated in excess of US$ 1 trillion (about US$ 3 billion per day) and accounted for 30% of the world's exports of commercial services. It also accounted for 6% of the overall export of goods and services, 6 - 7% of all overall jobs (direct and indirect) worldwide and contributed an estimated average of 5% to the global Gross Domestic Product. The industry has witnessed increase in global international arrivals from 683 million (generating US$ 478 billion) in 2000 to 880 million arrivals (generating US$ 852 billion) in 2009, which is a slight decline from 919 million arrivals (generating US$ 941 billion) in 2008, as a result of the global economic recession. The international arrivals are projected to reach nearly 1.6 billion by the year 2020 (UNWTO 2010).

1.3 Overview of Ecotourism development

Ecotourism is an important and rapidly growing "niche market" within the global tourism industry, which offers an opportunity to develop products that can contribute to national environmental conservation, socio-economic and cultural objectives by providing livelihoods for local communities and giving value to the maintenance of local traditions and culture. Although it has been difficult to calculate the size and growth rate of ecotourism, a range of estimates indicate that it has become the fastest growing sub-sector of the tourism industry. During the 1990s, the annual growth in demand for ecotourism was said to range from 10 to 34%, while in 2004, the UNWTO estimated that ecotourism and nature tourism were growing three times faster than conventional tourism industry as a whole. In 2005, the International Tourism Network also rated ecotourism as one of the fastest growing sub-sectors in the tourism industry, with an annual growth rate of 5% worldwide, representing 6% of the world Gross Domestic

Product and 11.4% of all consumers spending (Honey 2008). Ecotourism activities have been expanding rapidly over the past decades worldwide and further growth is expected in the future (UNWTO 2002). With an estimated worldwide annual growth rate of 10-15%, ecotourism is expected to grow faster than other form of traditional tourism which seems to have reached a saturation point (such as sun and sand resort tourism).

The importance of ecotourism as a key factor for economic development has increasingly been recognized by various governments and organizations over the years. The United Nations declared 2002 as the UN International Year of Ecotourism (IYE) and a world ecotourism summit was held in Quebec, Canada. The Quebec Declaration recognized ecotourism for providing a leadership role in advancing sustainable practices within the tourism industry by: increasing economic and social benefits for host communities, actively contributing to the conservation of natural resources and the cultural integrity of host communities, and by increasing awareness of travellers towards the conservation of natural and cultural heritage (Quebec Ecotourism Declaration 2002). Globally, a number of countries have embraced ecotourism and a growing number of nationally based and regional ecotourism societies have emerged in Kenya, Zanzibar, Laos, Pakistan, Australia, Italy, France, Japan, Ecuador, Mexico, Indonesia, Sir Lanka, Brazil and the Caribbean (Honey 2008).

1.3.1 Ecotourism: Search for an operational definition

The origins of the term ecotourism are entirely not clear but it appears to have first been used by Hetzer (1965) who identified four pillars or principles of responsible travel as follows: minimizing environmental impacts, respecting host cultures, maximizing the benefits to the local people and maximizing tourist satisfaction (Blamey 2001). Much has been written about ecotourism, but there is little consensus about its meaning, due to the many forms in which ecotourism activities are offered by a large and wide variety of operators, and practiced by an even larger array of tourists (UNWTO 2002).

Although the term ecotourism took shape and became popular in the 1970s and mid-1980s it remained vague due to lack of a clear definition. A number of authors and organizations have, however, formulated definitions to describe ecotourism. The first formal definition is generally credited to Caballos-Lascurain (1987) who defined ecotourism as travelling to relatively undisturbed or uncontaminated natural areas with the specific objective of studying, admiring and enjoying the scenery and its wild plants and animals, as well as any existing cultural manifestations (both past and present) found in an area (Blamey 2001).

Honey (1999) described ecotourism as travel to fragile, pristine, and usually protected areas that strive to be low impact and (usually) small scale. It helps educate the traveller, provides funds for conservation, directly benefits the economic development and political empowerment of local communities, and fosters respect for different cultures and for human rights. Fennell (1999) defined ecotourism as "a sustainable form of natural resource-based tourism that focuses primarily on experiencing and learning about nature, and which is ethically managed to be low-impact, non-consumptive, and locally oriented

in terms of control, benefits, and scale". It typically occurs in natural areas, and it is expected to contribute to the conservation or preservation of such areas.

The International Ecotourism Society (TIES) defined ecotourism as responsible travel to natural areas that conserves the environment and improves the well being of local people (TIES 2010). According to IUCN, ecotourism is environmentally responsible travel and visitation to relatively undisturbed natural areas in order to enjoy and appreciate nature while promoting conservation (Caballos-Lascurain 1996). The Green Globe 21 (2010) has adopted Australia's definition of ecotourism as ecologically sustainable tourism with a primary focus on experiencing natural areas that fosters environmental and cultural understanding, appreciation and conservation. Despite the endless debate over definitions of ecotourism and the many uses and misuses to which the term ecotourism is put, the concept remains valuable (Buckley 2009). The common denominator is that ecotourism is concerned with travel by environmentally conscious visitors to interact and enjoy nature while imparting economic benefits to the local community and contributing to environmental conservation at the destination. While definitions can be useful, what is more important is the appropriateness and quality of action taken by various stakeholders (WWF 2001). Over the years focus has therefore shifted to identifying the principles that can guide the operationalisation of ecotourism rather than how it is defined academically.

Wight (1993) identified the following key principles of ecotourism:

- It should not degrade the resource upon which it is based and should be developed in an environmentally sound manner. For instance, there should be boardwalks in forests to avoid trampling.
- It should provide long-term benefits to the environment (sustainable resource management), local communities (employment, improved incomes, education, etc), and the country (revenue, foreign exchange, improved services and infrastructure).
- It should provide for maximum visitor satisfaction as well as meet visitor expectations.
- It should provide opportunities for educating stakeholders on the environment and the value of ecotourism and conservation.
- It should promote good understanding and partnership between the various stakeholders i.e. government, NGOs (especially conservationists and donors), tourists, tour operators, local communities. Such partnership should provide an enabling system for sustainable development and nature conservation.
- It should promote moral and ethical responsibilities, good behaviours and attitudes towards the natural and cultural environment by all stakeholders.

TIES (2010) identified a number of principles to be followed by those who implement and participate in ecotourism activities as:

- Minimize impact by visitors through effective interpretation.
- Build environmental and cultural awareness and respect.
- Provide positive experiences for both visitors and hosts.

- Provide direct financial benefits for conservation.
- Provide financial benefits and empowerment for local people.
- Raise sensitivity to host countries' political, environmental, and social climate.

1.3.2 Ecotourism Vs other forms of tourism

While over the last decade there has been considerable progress in deepening the practices of ecotourism, it still remains far too common (Honey 2008) and it is frequently classified with and equated to other forms of tourism such as "sustainable", "responsible", "nature", "green", "low impact", 'geo", "adventure" tourism among others. This complicated the picture and created confusion to the tourism industry and the public in general.

Although ecotourism may share some of its aspects with other forms of tourism, it should be viewed as distinct from the other categories of tourism (Table 1.1). When properly understood, ecotourism goes further by striving to respect and benefit protected areas as well as the people living around or on the land (Honey 2008).

Table 1.1: Categories of tourism

Category of Tourism	Description
Nature tourism	Travelling to unspoiled places to experience and enjoy nature. It involves moderate and safe forms of exercise such as hiking, biking, sailing and camping.
Wildlife tourism	Travelling where the main attraction is to watch animals, birds and fish in their native habitats.
Adventure tourism	Nature tourism which requires physical skill and endurance (rope climbing, deep-sea diving, bicycling, water rafting or kayaking) and involves a degree of risk taking, often in little-charted terrain.
Alternative tourism	Tourism with a small or specialist market, or product that is distinct from mainstream or mass tourism.
Green tourism	An early term essentially synonymous with ecotourism, but never very well defined.
Cultural tourism	Tourism that focuses on exposing or introducing tourists to different local cultures.
Outdoor tourism	All forms of tourism that take place outdoors including high-impact and consumptive tourism such as motorized vehicles, hunting etc.
Sustainable tourism	Sustainable tourism is "envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems" (UNWTO 1988).

Source: Honey (2008) and Buckley (2009).

A clear distinction should be made between the concepts of ecotourism and sustainable tourism (Figure 1). The term ecotourism refers to a sub-sector within the tourism industry that focuses on minimising environmental and cultural consequences, contributes to conservation, community projects and environmental education. On the other hand sustainability principles apply to all types of tourism activities, operations, establishments and projects, including conventional and alternative forms (UNWTO 2002).

Figure 1.1: Position of ecotourism within the tourism spectrum (Adapted from Diamantis 1998).
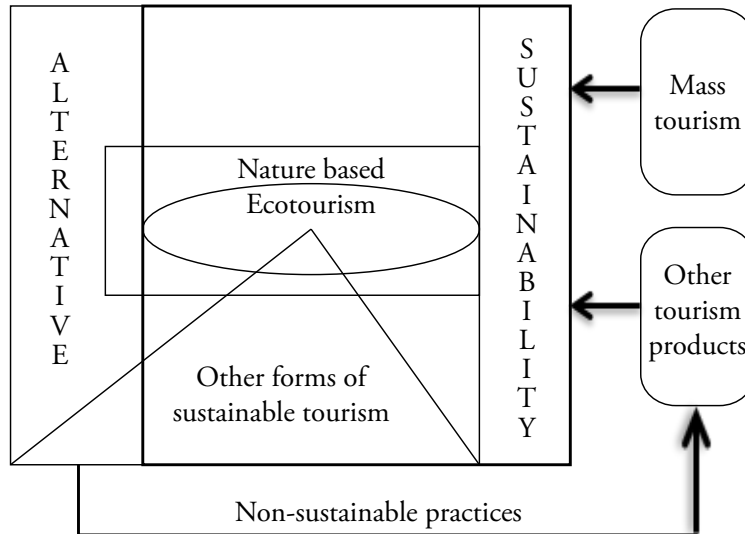
1.3.3 Contribution of Ecotourism to Development

Around the world, ecotourism has been hailed as a tool for economic development and environmental protection because it contributes to funding conservation and scientific research, protecting fragile and pristine ecosystems, mitigating climate change impacts, benefiting rural communities, promoting development in poor countries, enhancing ecological and cultural sensitivity, instilling environmental awareness and a social conscience in the travel industry, satisfying and educating the discriminating tourist, and building world peace (Honey 2008).

In countries where ecotourism is fast developing such as in Costa Rica (Box 1.1), it has helped increase tourist spending, linkages and multiplier effects within the mainstream tourism industry (Figure 1.2). Local communities have started benefiting from activities such as working as rangers, tour guides, environmental interpreters or camping staff in these same areas and creating local businesses focusing on transport, providing food, crafts and entertainment for foreign tourists. The case study presented in Box 1.1 is aimed at drawing lessons from Costa Rica's experience in developing ecotourism as a vehicle for economic development and nature conservation.

Box 1.1: Case Study of Ecotourism and Development in Costa Rica

Costa Rica is a small Central American nation that has gained an international reputation as a leader in environmental conservation and developed a system of national parks and other protected areas which now cover a quarter of the country's land area. Costa Rica's unique rainforest attracts tourists from all over the world. Costa Rica has been generating a trade surplus on the basis of earnings from tourism and has become the country's most important foreign exchange earner. The growth of ecotourism in Costa Rica has been greatly facilitated by the presence of institutions such as the Costa Rican Institute of Tourism (ICT), the Organization for Tropical Studies (OTS) and the National Institute for Biodiversity (INBio) which have helped to create Costa Rica's image abroad. Other factors that work in Costa Rica's favour include the presence of a peaceful democratic government, political neutrality, a good climate, a large proportion of educated middle class, a central location close to its largest market, North America, and a complete range of environment-based stakeholders intimately connected with the ecotourism industry. Costa Rica is benefiting because of product differentiation, education and provision of adventure sport activities. As a result of the initiatives described above, over the last 20 years tourism and ecotourism in particular has become a big export earner for Costa Rica. Tourism receipts grew from US$431 million in 1992 to US$1,551 million in 2005. The number of tourist arrivals increased from 811,000 in 1997 to 1,113,000 in 2002, 45.8 per cent from Canada and 37.9 per cent from the USA. ICT estimates that tourist spending per international tourist was US$971 in 1999. Average rent retention in Costa Rica from tourists has been 40 per cent which has resulted in increased income and infrastructure improvements. The non-economic benefits of this activity include ideas exchange and training opportunities. In ecologic terms, the increased area of land set aside for national parks is a huge gene pool of the more than 500,000 species that inhabit it. They aim to have forests harvested in a controlled, sustainable fashion in support of the tourist, chemical, pharmaceutical and genetic industries. These measures will be seen to be successful if they result in raising both gross domestic product and forest cover, while reducing lake and river siltation, reef destruction and fishery depletion. It is however too early to assess these long-term goals. Analysis of the Costa Rica experience using the eco-sustainable framework shows that, with the goal identified, and a strong broad local-based input into ecotourist strategies, policies can be designed to promote both economic and ecology-based sustainable ecotourism that address short-sightedness such as damage to the environment, high risk strategies and imperfect information. However, Costa Rica has faced challenges in developing tourism and ecotourism. Increased reliance on market mechanisms for the funding of forests has left small landholders and peasants without much state support by way of credit, budget and trust funds specifically allocated for their use. Although community participation in the planning process is an essential element in ecotourism, some decisions affecting communities have been made by bureaucrats with little or no understanding of the impact of the decision on the community. Tourism in Costa Rica has resulted in increasing levels of sex tourism which is a threat to the local communities' social and cultural structure.

Adapted from Courvisanos and Jain (2006).

The United Nations has recognised ecotourism as an instrument to help realize the Millennium Development Goals (especially goal 1 – eradicating extreme poverty and goal 8 – environmental sustainability) in developing countries, since it encourages nature conservation, helps yield demand push, that eventually fosters local development, creates employment, and helps reduce poverty. Unfortunately, there has been little systematic effort to gather data worldwide on ecotourism as a sub-sector distinct from other forms of tourism (Honey 2008). This has therefore resulted in lack of accurate data on the contribution of ecotourism to economic development, environmental conservation and social development of the communities where it is practiced.

Figure 1.2: Conceptualised linkages and leakages in a tourism industry (Adapted from Meyer 2007).
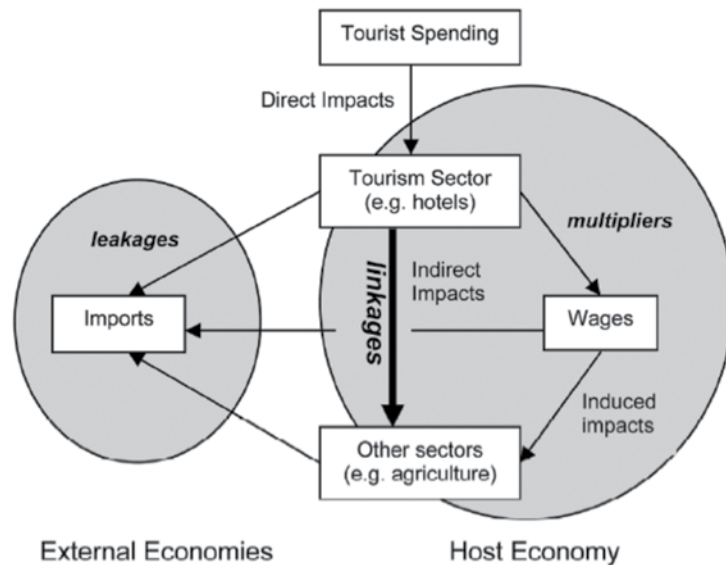
Although ecotourism has been marketed as a win-win solution for the third world, the environment, the tourist and the travel industry, close examination shows a much more complex reality (Honey 2008). Ecotourism is not a panacea for all development challenges faced by countries especially in the developing world. If not efficiently planned and managed, the ecotourism industry can create downturns to the sustainability of local environment and to living conditions of local populations. Development of ecotourism opens doors for a wide range of investors to reach more remote environments (forests, coastal and marine areas) and communities that were previously not visited. When poorly planned, unregulated, and over hyped, ecotourism, like mass tourism or even traditional nature tourism, can bring not only marginal financial benefits but also serious environmental and social consequences. The term "eco-terrorism" has been coined up

by some groups to describe the growth of high-impact tourism in natural areas (Honey 2008).

While countries – especially developing ones - are embracing ecotourism, there is a need for mechanisms to help avoid the problem of "greenwashing"[1]. Majority of enterprises that refer to themselves as ecotourism actors, do so to take advantage of the natural environment as a key part of the tourism product, with no suggestion of how they would help to conserve the natural environment. For most tourism marketers, almost any form of nature-based tourism is advertised as ecotourism, irrespective of environmental management, education or conservation (Buckley 2009). As a result most of what is marketed as ecotourism is simply conventional mass tourism wrapped in a thin veneer of 'green' visits within conventional packages (Honey 2008). Seychelles is one of countries' that has been able to substantially develop ecotourism and put in place a framework with mechanisms to avoid any potential negative impacts (Box 1.2). Seychelles provides good practices from which the IGAD countries can learn from.

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1   Greenwashing is when a business or destination presents itself as an ecotourism establishment when in reality it does not comply with the generally accepted standards and principles of ecotourism

2.0 Ecotourism in the IGAD region

2.1 Overview of the IGAD region

The Intergovernmental Authority on Development (IGAD), comprising Djibouti, Eritrea, Ethiopia, Kenya, Somalia, Sudan and Uganda (Figure 2.1), is one of the recognized eight major Regional Economic Communities (RECs) bringing together the Eastern African Countries.

Figure 2.1: The IGAD Political Boundaries and Partner States

The IGAD vision is based on the determination of its member states to pool their considerable natural endowments and human resources together through suitable and practical arrangements with the view to:

- Tackling the present and future challenges in promoting sustained economic growth among the member states more effectively and efficiently;
- Expanding co-operation among IGAD member states so that the region may play its proper role in regional and continental integration; and
- Enabling the region to interact and compete in the global economy on an equal footing.

The IGAD, with vast natural, cultural and historical resource has decided to develop a regional IGAD Tourism Master Plan (TMP) to guide the development of the tourism industry with specific emphasis on ecotourism) drawing from the AU/NEPAD Tourism Master Plan and from other RECs that have been implementing regional tourism initiatives over the years. Recognizing that member states are at different stages of developing the

tourism industry, the IGAD TMP is meant to galvanize and harmonize national and regional actions.

The IGAD region covers an area of 5.209 million km² (approximately 3.8% of the world's total area), with an estimated total population of 207 million in 2008, an average population density of 54 persons per km² and an estimated average GDP per capita of US$ 722 (UNdata 2010).

Table 2.1: Summary of IGAD Demographic and Economic Characteristics based on 2008 data

Country	Area (km2)	Population	Population density	GDP (million US$)	GDP Per Capita (US$)
Djibouti	23,200	849,000	36.6	981	1155.5
Ethiopia	1,104,300	80,713,000	73.1	25,727	318.7
Eritrea	117,600	4,927,000	41.9	1476	299.5
Kenya	580,367	38,765,000	66.8	30,552	788.1
Somalia	637,657	8,926,000	14.0	2660	298.0
Sudan	2,505,813	41,348,000	16.5	70,276	1699.6
Uganda	241,038	31,657,000	131.3	15,829	500.0
Total	5,209,975	207,185,000	380.2	147501	5059.4

Source: UNdata (2010)

2.1.1 Overview of tourism in IGAD region

The IGAD region is endowed with a rich diversity of cultures and peoples, geographic features and biodiversity. Member states have a variety of tourism attractions, a number of which are based in conservation areas and others found outside protected areas (Box 2.1 and Appendix 3). Unfortunately, most tourism potentials have not been fully exploited despite member state governments increasingly recognising the potential of tourism as a vehicle for nature conservation and economic development.

Box 2.1: Summary of conservation areas in IGAD member states

Ethiopia

- 9 National Parks (20,819 km^2)
- 8 UNESCO World Heritage sites
- 2 UNESCO Biosphere Reserves

Sudan

- 6 National Parks (60,370 km^2)
- 19 Game reserves (35,500 km^2)
- 5 UNESCO World Heritage sites
- 2 UNESCO Biosphere Reserves

Uganda

- 10 National Parks (11,037 km^2)
- 12 Wildlife Reserves
- 13 wildlife Sanctuaries
- 5 Community Wildlife Areas
- 3 UNESCO World Heritage Sites
- 2 UNESCO Biosphere Reserves

Kenya

- 23 National Parks (30,348.29 km^2)
- 28 National Reserves (16,478.40 km^2)
- 6 Marine National Reserves   (706,000 km^2)
- 4 Marine Parks   (70.09 km^2)
- 4 National Sanctuaries (71.34 km^2)
- 4 UNESCO World Heritage sites
- 6 UNESCO Biosphere Reserves

Djibouti

- 3 National Parks

Somalia

- 3 National Parks

Note: Details in Appendix 3

Over the years member states have placed more emphasis on marketing and improving the image of their countries as tourism destinations. As a result the number of international tourists has increased in each member state (Figure 2.2) and the tourism industry has bright future development prospects.

Figure 2.2: International Tourist Arrivals from selected IGAD member states
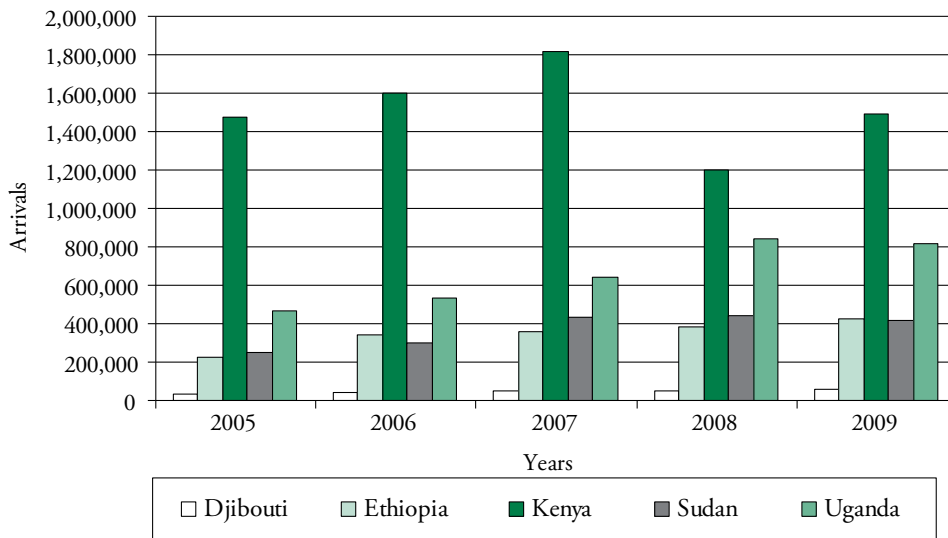
Source: Member states Ministry of Tourism statistics, UNWTO and UNdata (2010).

The variations in tourist arrivals across member states are mainly as a result of the different stages of tourism development. Kenya and Uganda, which have a relatively better developed tourism industry and have engaged in tourism for a relatively longer time, attract a higher number of international tourists than the other member states.

Despite the varying levels of tourism development, all countries in the region (apart from Somalia and Eritrea where data are not readily available) have recorded a steady growth in the number of international tourist arrivals. The number of tourist arrivals in Ethiopia and Djibouti more than doubled from 184,078 in 2004 to 422,870 in 2009 and from 26,300 visitors in 2004 to 58,000 visitors in 2009 respectively. In general, the growth trend in arrivals indicates that the region has the capacity to become a popular destination in Africa for tourists if the industry is properly planned, coordinated and managed.

In most countries, a large percentage of tourism arrivals are from the African region and especially neighbouring countries. For example, in Uganda, statistics for 2009 indicate that 30.6% of international arrivals were from Kenya alone. In the case of Ethiopia, tourists originating from within Africa accounted for 40% of the total arrivals, the majority of whom were from Kenya, Sudan Nigeria and Djibouti. This suggests the need for regional efforts such as through IGAD, to develop the regional tourism market which has been neglected by member states yet there is a high potential.

The increasing international tourist arrivals in the region have corresponded with increased receipts from the tourism industry as indicated in Figure 2.3.

Figure 2.3: Tourism Receipts (USD in Millions) from selected IGAD member states
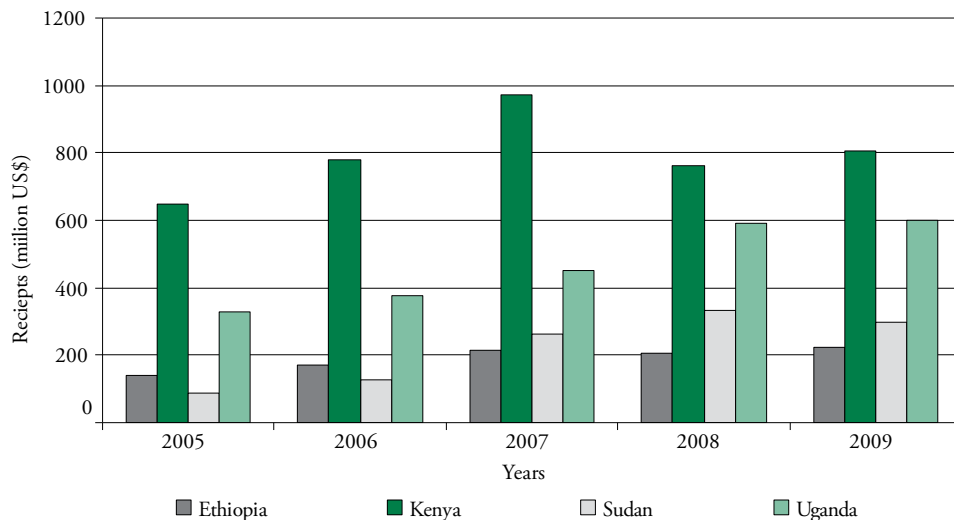
Source: Member States Ministry of Tourism statistics, UNWTO (2010).

Figure 2.3 indicates a steady increase in revenue generated by the tourism industry to the economies of the respective member states. The 2008 statistics show that in Uganda tourism contributed 9.2% to GDP while in Kenya it accounted for 10.8% of the GDP (and this is projected to increase to 15% by 2020). In Ethiopia, tourism on average contributes 0.96% to GDP and with an annual tourism revenue growth rate of 19.5% (2005 to 2008) and contribution to GDP is expected to increase. The tourism industry also significantly contributes to the economy by creating employment opportunities either directly or indirectly. However, for most of the countries, this data is either inaccurately collected or not collected at all. In Uganda the available data shows that in 2008 tourism and the travel industry contributed 7.4% of total employment in the country by creating 420,000 jobs.

In general the contribution of the tourism industry to the economy of member states has not been accurately recorded due to lack of a comprehensive and specialised system to collect tourism data. Tourist arrival statistics are mainly collected from major entry points (especially airports) and in some cases not capturing arrivals through all boarder ports. More so member countries use different tourist entry form formats which means the statistics collected can not be accurately compared. Domestic tourism (movements and expenditure) statistics are largely not captured in most member countries, therefore the contribution of tourism to the economy is not fully known. Tourism being a cross-sector industry has always faced a challenge, not only in the IGAD region but world wide, of accurately and efficiently collecting tourism statistics. As a result the role and contribution of tourism to socioeconomic development has been largely underestimated especially in developing countries were collection of statistics for all other economic sectors is not fully

efficient. To over come this UNWTO developed the Tourism Satellite Account (TSA) system which has not yet been adopted by IGAD member states apart from Kenya that is piloting its implementation.

Based on the findings from interviews with officials in ministries designated to handle tourism activities from member states where the study was conducted, it is realised that there are limited IGAD regional efforts to develop and tap into the international and regional tourism market. Member countries are promoting and developing their respective tourism industries independent of each other, apart from Kenya and Uganda, who under the East African Community (EAC) have started on a joint promotion and marketing campaign together with other EAC member states. Djibouti and Ethiopia also signed an agreement to enhance cooperation and development of tourism among the two countries. In general, in order for the tourism industry to benefit under the IGAD regional framework, there is need for regional strategies to market, develop and improve the tourism image of the region in order to tap into the regional and international markets.

2.2 Ecotourism Growth Diagnostics in IGAD region

Although a number of initiatives have been started in Africa to promote tourism, limited attention has been given to ecotourism and as a result, it has not yet been fully embraced by most destinations and countries. In the IGAD region, ecotourism is still a relatively new phenomenon, especially in countries whose tourism industry is still in the early stages of development. However, ecotourism is increasingly being recognised by member states as a viable approach of attaining sustainable tourism development. Kenya, Uganda and Ethiopia have undertaken a number of initiatives to promote and strengthen the application of ecotourism principles in the various sections of the tourism industry through private sector and civil society initiatives.

2.2.1 Policy, Legal and Regulatory framework for Ecotourism development among IGAD member states

Tourism development in the IGAD region is guided by national policies and laws together with international conventions, most of which have been ratified by the member states - which include; Convention on International Trade in Endangered Species (CITIES) 1973, Ramsar Convention on Wetlands of International Importance (1971), Convention on Conservation of Migratory Species (CMS) 1983, and Convention on Biological Diversity (CBD) 1992 among others.

The development and management of the tourism industry in member states is mainly guided by national policy and regulatory instruments (Box 2.2). Some of the instruments are not necessarily from the tourism industry since it cuts across various government sectors. Important to note is the fact that, no country has formulated a policy or put in place a regulatory framework specifically for ecotourism.

Although some sections of the tourism policies do explicitly refer to ecotourism (Box 2.3) the provisions are very few and are not sufficient to foster the development of ecotourism. However, it should be noted that as much as the policies do not fully cater for ecotourism, they refer to guidelines and strategies that can provide a foundation on which to eventually design and formulate ecotourism specific regulatory frameworks.

The tourism policy goals and objectives of Kenya, Uganda and Ethiopia, though formulated in different countries, they address key aspects of economic benefits, environmental protection and cultural preservation, which also form the major components of the ecotourism principles. The key aspects addressed in the tourism policy objectives of the three countries are;

(a)   Economic Benefits
- Achieve national recognition of tourism as a priority growth sector and with substantial contribution to GDP, employment and foreign exchange earnings.
- Maximise tourism revenues by increasing tourist arrivals, length of stay and daily expenditure.
- Distribute revenue earnings from tourism widely especially through wider community involvement.
- Contribute to raising human standards of living and livelihoods of the communities through job creation and poverty reduction.
- Enhance linkages between tourism and other economic sectors to stimulate multiplier effects and reduce leakages.

(b)   Environmental Conservation
- Encourage the development nature friendly tourism products through responsible and sustainable environmental practices.
- Ensure coordination between different various conservation programmes and government agencies.
- Provide mechanism of re-investment of tourism revenues in protection of natural resources.
- Promote awareness among all tourism stakeholders on environmental management issues.

(c)   Cultural Preservation
- Put emphasis on development of cultural tourism based on rich culture and history.
- Develop and maintain cultural attractions such as monuments, historical sites, museums and performing art for tourism.
- Preserve and manage the rich cultural and natural heritage for the benefit of domestic and foreign tourists and for future generations.
- Encourage the further development of a national identity and the maintenance of pride in authentic national and local culture.
- Support development and marketing of handicrafts to show case culture and also provide rural economic benefit sharing.
- Protect local cultural and social values from negative influences of tourism.

However the above economic, environmental and cultural aspects are mainly considered under the general sustainable tourism paradigm, which can not full take care of the ecotourism specific principles. Where as sustainability principles can be applied to all types of tourism activities, operations, establishments and projects (including conventional and alternative forms of tourism), ecotourism principles mainly apply to a specific segment within the tourism industry which is mainly formed of, but not limited to, small tourism establishments with low impact activities and operations (UNWTO 2002).

Despite the absence of ecotourism regulatory frameworks, some member states, through civil society organisations like Ecotourism Kenya (Box 2.4), have developed guidelines which various players in the sector can follow to integrate ecotourism principles within their operations. Ecotourism Kenya has gone a step further by introducing an eco-rating scheme as means of evaluating the performance of ecotourism destinations in the country.

Some few tourism operators (camps, lodges, hotels and tour companies) as part of their Corporate Social Responsibility (CSR) are contributing to conservation of nature, helping communities to pay school fees for the disadvantaged children, contributing funds to construct schools or health centres and involving the community members in a number of tourism activities like tour guiding.

Apart from the private sector, governments through national wildlife and forestry conservation agencies such as UWA and NFA (Uganda), KWS (Kenya) and EWCA (Ethiopia) have come up with ecotourism guidelines for those interested in investing and operating tourism facilities within the protected areas. However, the guidelines that have been developed are isolated, ad hoc and mostly based on individual organisations initiatives. Ecotourism therefore still lacks a solid national policy and legal framework for it to thrive. More so there are no harmonised national or regional ecotourism guidelines that can help promote and develop the ecotourism sub-sector in the region.

As part of its initiatives Ecotourism Kenya has of recent launched a drive of expanding its activities (especially the eco-rating scheme) to the East African region. Such initiative offers a spring board to encourage and launch regional ecotourism associations that can eventually encourage further involvement and support from governments of member states. IGAD region can draw lessons from other RECs where a number of regional ecotourism initiatives have been ongoing.

Further more, the existing member states policy and regulatory frameworks are silent about the promotion of research in ecotourism. Most policy documents mostly refer to wildlife and tourist market research. Most government research departments concentrate on collecting tourism statistics on visitor arrivals, departures, expenditure and hotel occupancy. Less emphasis is given to aspects such as ecotourism product development, eco-marketing and eco-tourist visitor satisfaction among others. Although institutions of higher learning (such as universities) and consulting firms do conduct a number of researches in ecotourism, there are no formal mechanisms through which the research outputs feed into the government system to inform tourism policy formulation, implementation and review.

Similarly there is no eco-marketing framework in place to position individual member states and the region in general as an ecotourism destination. The official tourism websites (either of the Tourism ministries or Tourism marketing boards) none of the countries explicitly portrays and markets itself as an ecotourism destination – not even Kenya which has achieved substantial progress in advancing and implementing ecotourism principles. Most of the websites refer to cultural tourism, historical tourism, community tourism, and wildlife tourism – which essential do not necessary equate to ecotourism.

2.2.2 Country Specific Ecotourism Diagnostics and SWOT analysis

As earlier noted various countries do not collect statistics that are specific to ecotourism, therefore the ecotourism diagnostics are mainly based on overall tourism performance for each country, which has correlated and analysed in relation to the general ecotourism principles. The following four IGAD member States have been analyzed against this background: Ethiopia, Kenya, Djibouti and Uganda.

2.2.2.1 Ethiopia: Ecotourism Diagnostic

Ethiopia is one of the fast emerging tourism destinations in the region offering a variety of tourist attractions and products. In 2008 the country received 383,399 international visitors, a 7.1% increase from 357,841 visitors received in 2007. The sector generated US$ 204 million in 2008.

With more world heritage historic sites than any country in Sub Saharan Africa (SSA), Ethiopia has diverse and rich historical routes in the northern part of the country which pass through major sites such as Axum, Gondar, Lalibela among others. This takes the tourists through a history of legendary rulers, fabulous kingdoms and ancient mysteries some dating back as far as 4.8 million years ago. This experience is enhanced by the existence of an approximate population of 80 million with over 80 ethnic groups, each with unique customs, traditions and values. With a total area of 1.1 million square kilometres, Ethiopia has a variety of natural attractions. The country has a contrasting landscape ranging from the rugged Siemen Mountains (4620 meters above sea level) to the Denakil depression (120 meters below sea level) and a number of rift valley lakes and rivers – including the Blue Nile. With nine national parks, Ethiopia has a variety of birds and wild animals including endemic species such as the mountain fox at Siemens.

Most of the tourism in Ethiopia is characterised by mainstream tourism accommodation facilities and services providers mainly tour companies which take visitors to various parts of the country. Although no specific regulatory framework has been put in place by government to develop ecotourism, it is slowly but steadily taking root especially with private sector initiatives. Ecotourism Association of Ethiopia (EAE) has been at the forefront on promoting and developing ecotourism in the Country. EAE brings together over 30 private companies ranging from five star hotels, tour operators to small lodge operators, with a mission to create high standard eco-destinations and facilities that contribute to alleviation of poverty, upgrading of human resources, promoting Ethiopia's rich cultural heritage and conserving environmental resources.

Table 2.2: Ethiopia Ecotourism SWOT analysis

Strengths	Weaknesses
• Diverse natural tourism resources – wildlife conserved in 9 National parks • Novelty - many of destinations not visited or fully visited especially in the South • Preserved rich and diverse cultures/traditions – over 80 ethnic groups • Diverse, unique and globally significant sites - 8 UNESCO World Heritage sites, 2 UNESCO Biosphere Reserves • Existence of Ecotourism Association of Ethiopia (EAE) • Increasing private sector investment in ecotourism sub-sector – especially in eco-lodges • Private companies venturing into offering eco-products such as birding e.g. Nurgi Birding Ethiopia tour company • Willingness of individual private companies to embrace ecotourism principles • Hospitable and friendly people	• Increasing encroachment on conservation areas • Limited community awareness about ecotourism • Poor image of region as an ecotourism – past political instability • Limited mobilisation of community to engage in ecotourism • Existing policies and regulatory frameworks not explicit on ecotourism • Limited government support and funding to ecotourism initiatives • No specific data collected and statistics compiled on ecotourism (arrivals, contribution to conservation, employment etc) • Poor quality service provision – untrained and poorly skilled tour guides to enhance tourist education • No formal mechanisms of benefits sharing with and leakages reduction from the communities • Lack of specific ecotourism investment strategies and guidelines • Limited involvement of domestic tourists in ecotourism
Opportunities	**Threats**
• Strengthening and building capacity of EAE to perform its roles, have more members and establish an eco-rating scheme • Strengthening tourist education and interpretation centres especially at various historical sites • Diversify ecotourism products e.g. conserve and develop health spas at hot springs such as at Chirimit hot spring. • Promote development of ecotourism in south of Ethiopia which as rich natural and cultural resources • Strengthening and building capacity for existing institutions to promote ecotourism (Ministry of Culture and Tourism – MoCT and Ethiopian Wildlife Conservation Authority - EWCA) • Government developing ecotourism strategies and guidelines in collaboration with EAE • Many untapped ecotourism resources and opportunities (wide investment options – water, cultural, historical, landscape based • Limited sector competition in ecotourism ventures/products - 'quicker' investment returns • Ecotourism marketing through existing general tourism marketing campaigns by MCT • Mobilise and empower community to develop or co-manage ecotourism projects	• International terrorism • Insecurity within some neighbouring countries • Global financial depression • High competition from developed ecotourism destinations e.g in Egypt • Negative travel advisories • Negative image of country - perceived as a region of famine, hunger and suffering

2.2.2.2 Kenya: Ecotourism Diagnostic

Kenya has a diverse natural environment and unique heritage. The country boosts of numerous attractions ranging from pristine beaches along the coast, snow-capped mountain to varied landscapes of the rift valley, lake basins, forest and vast savannah beaming with wildlife to cultural diversity. Of all the countries in the IGAD region, Kenya receives the highest number of international tourists and generates the highest amount of revenue from tourism. In 2009, the country received 1.4 million visitors who generated US$ 808 million.

In the region, Kenya has had the longest experience in the development and promotion of ecotourism. After the country experiencing the negative impacts of uncontrolled tourism development characterised by unplanned development of tourism facilities such as beach hotels, increased degradation of natural resources and hostility of the community towards protected areas, the government as far back as early 1970s, began to put in place measures to reverse the situation. Among the measures was a strategy of ensuring that the communities living near protected areas financially benefit from the parks and tourism as a means to not only motive them conserve the environment, but also improve on their socio-economic status. This measure was implemented by government putting several reserves, including Masai Mara and Amboseli National park under the control of local county councils which began receiving revenue from both entrance fees, hotels and other tourism facilities (Honey 2008). Through the group ranch approach, some communities have given up part of their grazing land for conservation and in partnership with the private sector engaged in tourism business ventures. Over the years these approaches have been broadened to encompass environmental and culturally sensitive tourism that helps to educate visitors and local community members – forming the foundation of ecotourism development in Kenya. Despite the development of tourism in Kenya, there has is no specific legal framework to guide and regulate ecotourism development.

To further enhance, strengthen and sustain the development of a 'responsible' tourism industry, civil society together formed Ecotourism Kenya in 1996. Through collaboration with various stakeholders Ecotourism Kenya has over the years played a significant role in promoting and advocating for ecotourism in the country.

Table 2.3: Kenya Ecotourism SWOT analysis

Strengths	Weaknesses
• Relatively developed tourism industry (compared to other IGAD member states) • Diverse tourism attractions that have been developed for ecotourism – especially through the group ranch model e.g the Il Ngwesi group ranch run by the Maasai • Unique and globally significant sites - 4 UNESCO World Heritage sites, 6 UNESCO Biosphere Reserves • Existence of an umbrella ecotourism association – Ecotourism Kenya (EK) • Ecotourism guidelines already developed for tourism operators by EK • An operational eco-rating scheme – with over 50 eco-rated tourism establishments • Existence of umbrella community tourism association - KECOBAT • Community Based Tourism guidelines developed by government to ensure increased community involvement and benefits sharing from tourism • Existence of higher education tourism and hospitality training institutions – e.g. Utaali College • Piloting the TSA system • Private Sector-Community partnership in ecotourism development	• Limited marketing of Kenya as an ecotourism destination despite development of various ecotourism destinations • Perception of Kenya as mass tourism destination - especially coastal areas • Limited funding from government to promote ecotourism ventures • Tourist harassment – especially at beaches where they are herded and restricted by operators • No specific data collected and statistics compiled on ecotourism (arrivals, contribution to conservation, employment etc) • Limited product/service quality control and standards at ecotourism destinations • No formal/legal mechanisms in place to ensure benefits sharing between community and private operators • Lack of formal regulatory framework to guard against leakages of benefits from the communities • No data collected and statistics compiled specifically on ecotourism (arrivals, contribution to conservation, employment etc) • Limited involvement of domestic tourists in ecotourism
Opportunities	**Threats**
• Re-branding Kenya as an ecotourism destination • Strengthening private-public-community partnership in ecotourism development • Having more tourism organisations join EK and be eco-rated • Ensuring the TSA captures ecotourism related information/data • Opportunity of Ecotourism marketing through existing tourism marketing campaigns by KTB • Giving priority to ecotourism enterprises through existing tourism funding mechanisms – such as Kenya Tourism Development Corporation and Kenya Tourism Trust Fund • Enhancing ecotourism research and training in learning institutions • Potential for ecotourism product diversification – e.g in agro-tourism, cruise tourism • Development of national ecotourism strategic plan	• Poor image - Kenya perceived as insecure and unsafe – especially after terrorism bombings in Nairobi and Mombasa and post election violence in 2008 – resulted in arrivals declining to 1.2 million tourists in 2008 from 1.8 million tourists in 2007 • Insecurity within some neighbouring countries • Piracy in Indian Ocean • Changes in global financial situation • High competition from more developed ecotourism destinations – e.g South Africa • Negative travel advisories

2.2.2.3 Djibouti : Ecotourism Diagnostic

Djibouti is the smallest country in the IGAD region with a total size of 23,200 square Kilometres and with an approximate population of 849,000 people. Despite being a small country, it offers a variety of tourism activities which include deep-sea diving, whale watching and sport fishing in the Gulf of Tadjourah and around numerous islands. It also offers nature and geological explorations in the largely inhabited hinterland. Although the tourism industry is at its infancy stage of development it is rapidly developing. International tourist arrivals have nearly tripled from 20,100 in the year 2000 to 58,425 tourists in 2009. This progress is attributed to the aggressive tourism marketing and promotion carried out by the National Office of Tourism of Djibouti (ONTD), which has helped improve the image of the country, which had for long been perceived as insecure destination with nothing to offer to the tourists.

Ecotourism is a relatively new concept to most tourism operators and there is no ecotourism association in the country. Although ecotourism is not explicitly emphasized, government recognises that the country has a fragile marine and semi arid environment which can easily be damaged by the increasing number of tourists. As a result, the ONTD has put in place guidelines for tour operators and it regulates the number of tourists engaging activities, such as deep-sea diving and whale watching along its shores. It regularly monitors the marine tourism hotspots to ensure that foreign tour operators do not sneak in with undeclared tourist ships. On the other hand, the government is also striving to ensure that tourism development not only contributes to improving the quality of life of the population but also contributes to the socio-cultural enrichment of its peoples.

Table 2.4: Djibouti Ecotourism SWOT analysis

Strengths	Weaknesses
• Novelty of country – many destinations are less visited or even not visited yet – provide authentic experience to tourists • Quality beaches and tourism activities - deep sea diving, sport fishing • Rich and diverse marine wildlife • Steadily developing and active private sector • Small scale- low impact accommodation establishments – e.g in Tadjourah, Obock • Strong diplomatic ties with various countries such as France (48% of tourists are from France) and Gulf states (17% tourists are from Gulf states) • Few investors in ecotourism sub-sector – limited competition	• Limited regulatory framework for tourism development • Limited tourism industry awareness about ecotourism principles and practices • No explicit guidelines for ecotourism development and investment • Limited skilled tourism human resource to support ecotourism establishments • Limited statistics compiled on tourism - no data collected on contribution of tourism (arrivals, contribution to conservation, employment etc) in general and ecotourism in particular • Limited community awareness and participation in tourism • No formal mechanisms of benefits sharing between communities and tourism establishments • Lack of an umbrella ecotourism association • Tourist harassment/nagging – by beggars, vendors selling merchandise

Opportunities	Threats
• Young and small tourism industry – makes introduction of ecotourism much easier • Increasing government support to tourism – particular emphasis needed on ecotourism • Increasing private sector interest and investment in sector – need to get them interested in ecotourism ventures • Many untapped ecotourism opportunities e.g cultural tourism, cruise tourism • High ecotourism investment options– sector not fully developed • Marketing Djibouti as an ecotourism destination in existing tourism marketing campaigns by ONTD • Ability to attract few low impact - high end tourists from Gulf States as opposed to mass tourism	• Poor image of country as a tourism destination – perceived insecure • Fragile semi-arid environment – susceptible global environmental and climate change • Insecurity in neighbouring countries • High competition from developed ecotourism destinations e.g in Egypt • Negative travel advisories

2.2.2.4 Uganda : Ecotourism Diagnostic

The strength of Uganda as a tourism destination lies in the diverse and unspoilt wilderness areas that are home to a variety of plants and animals. The country has a variety of landscapes ranging from arid savannas to swamps, lakes, high mountains and tropical forests which are famous for their many regionally endemic bird and primate species including the highly endangered mountain gorilla in Bwindi National Park. The country also has unique mix of cultures and traditions which are a result of great ethnic migrations that have taken place over the past few hundred years. After years of political instability in the 1970s and 80s, the tourism industry has steadily developed with international arrivals increasing to 468,000 in 2005 to 844,000 in 2008.

Uganda has over the years promoted low impact tourism by encouraging and adopting ecotourism principles. Through the Tourism Policy (2003) the government focuses on ensuring sustainable use of tourism resources, minimising negative environmental impacts, impacts, empowering communities through district tourism associations to appreciate the value of natural and cultural resources, to engage and benefit from tourism development. Although Uganda does not have an ecotourism association, it over the years built mechanisms in its institutions to steer the development and promotion of ecotourism values in the industry. Ecotourism guidelines and principles have been formulated and implemented in protected areas across the country by Uganda Wildlife Authority (UWA) and National Forest Authority (NFA). Through government efforts, the communities around National Parks and Forest Reserves have been mobilised into Community Protected Area Institutions (CPI's) through which they are engaged in decision making, environmental conservation and revenue sharing programmes. Some communities especially near National Parks have established ecotourism projects such as, community wetland conservancies, community rest camps, crafts centres and cultural entertainment groups. Despite the lack of a regulatory framework, individual private sector players have established a number of tourism sites (lodges, resorts) based on ecotourism principles.

Table 2.5: Uganda: Ecotourism SWOT analysis

Strengths	Weaknesses
• High diversity of unspoiled wildlife and natural attractions • Novelty of destinations – many places not yet fully visited or even visited at all • Unique and globally significant sites - 3 UNESCO World Heritage sites, 2 UNESCO Biosphere Reserves • Existing ecotourism guidelines in protected areas - developed by NFA and UWA • Ecotourism investment guidelines developed and investment priority areas identified in conservation areas by UWA • Mechanisms in place to ensure communities benefit from tourism – 20% of gate collections in protected areas are give to surrounding communities for investment in communal projects • Existence of umbrella community tourism association - UCOTA • Increasing private sector investment and involvement in ecotourism sub-sector – especially in eco-lodges • Existence of higher education tourism training institutions – where ecotourism is taught • Hospitable and friendly people – low levels of tourist harassment	• Existing policies and regulatory frameworks not fully enforced to explicitly cater for ecotourism • Limited funding from government to promote ecotourism ventures • Lack of an umbrella ecotourism association • No data collected and statistics compiled specifically on ecotourism (arrivals, contribution to conservation, employment etc) • Limited marketing of Uganda as an ecotourism destination • Increasing environmental degradation outside protected areas • Limited community awareness about and involvement in ecotourism • Lack of quality control and standards in the existing ecotourism destinations • Inadequate tourism information and database – to cover all sectors of tourism • Limited involvement of domestic tourists in ecotourism
Opportunities	**Threats**
• Many untapped ecotourism opportunities – beach and marine eco-resorts, agro-tourism, health and spa tourism • high investment options– ecotourism sub-sector not fully developed • Formation of an umbrella ecotourism association • Establish an eco-rating scheme for existing eco-destinations – especially eco-lodges • Ecotourism marketing through existing general tourism marketing campaigns by UTB • Development of national ecotourism strategic plan • Emphasis of ecotourism research and training in tourism training institutions • Mobilise and empower community to develop or co-manage ecotourism projects	• International terrorism • Changes in global financial situation • High competition from other destinations e.g South Africa • Disease spread – such as Ebola, Avian flu • Negative travel advisories • Poor image of region as an ecotourism destination - political instability in some parts of the country

Important to note is that although member states have tourism regulatory frameworks and high opportunities for ecotourism development, none of them have an ecotourism specific policy or strategy. None of the states have a streamlined mechanism to collect ecotourism specific statistics, separate from the general tourism statistics. This therefore implies that it is not possible to accurately aggregate the contribution of ecotourism either

to socio economic development or conservation in general. Equally important to note is that, there is no regional framework under which the existing private sector and civil society ecotourism initiatives are brought together. As a result ecotourism destinations and associations have continued to operate independently. The IGAD framework offers an opportunity to coordinate existing efforts and have harmonised regional ecotourism initiatives.

3.1   Constraints to growth of Ecotourism in IGAD region

In order to ensure logical and better understanding, the constraints affecting the ecotourism growth in the IGAD region are categorised and discussed under the following sub themes

3.1.1 Weak Policy, legal and regulatory framework

Although some member states have invested in formulation of policies, laws and guidelines to enable the development of tourism a number of private operators, community and civil society organisations feel that most of them are not being enforced and implemented by government. Some argue that if the exiting laws and policies were to be fully implemented, then ecotourism would automatically develop even without any additional legislation. Lack of implementation has been attributed to limited government will, support and recognition of tourism as a priority sector which needs equal attention and funding, or even more, compared to sectors like agriculture and industrialisation.

Tourism which is a cross-sectoral industry composed of several stakeholder groups, (ranging from craft makers to five star hotel owners - who in most cases have varying interests and goals) is constrained by a poor or non existent stakeholder coordination mechanism. The public institutions and ministries charged with the responsibility of regulating, marketing and managing of the tourism industry are in most cases incapacitated by limited financial and human resources. On the other hand although private sector, civil society and community umbrella stakeholder associations exist (such as KATO, KATA, ETOA, KECOBAT, UCOTA, AUTO, UTA, EK, EAE), they are fragmented, their membership is still limited, and they lack adequate funding. This situation limits the capacity of even the few existing ecotourism associations to monitor, guide and drive the sector forward.

Furthermore, institutional capacity, both in public and private sector is still inadequate to effectively propel the development of tourism in general and ecotourism in particular. Policies and laws within government sectors and across member states are not harmonised which has resulted in: degradation of natural resources (including transboundary resources); neglect of cultural and historic heritage; increase in human-wildlife conflicts; and long cumbersome visitor entry formalities - even for visitors from within the member states. Such a situation has not provided a conducive environment in which ecotourism can thrive.

Weak implementation of laws, limited coordination and inadequate institutional capacity have translated into tourism management gaps that have encouraged leakages from the tourism industry which in turn limit multiplier effects (Meyer 2007). The local

communities are the category of stakeholders that have mainly been negatively affected by increased leakages and reduced multiplier effects. They have ended up not benefiting from tourism since there is no formal mechanism in place to involve them and ensure equitable sharing of benefits and opportunities. As a result most communities have maintained a negative perception about tourism and they remain apprehensive to all forms of tourism including ecotourism.

3.1.2 Low level of community involvement

In all member states, the level of community involvement in tourism is still very low. Communities often lack awareness of the tourism resources in their area and are unable to appreciate ecotourism as a potential vehicle for developing their area. The local government leadership has not been skilled and empowered to guide community involvement in tourism in general and ecotourism in particular. Communication and collaboration between communities, national and umbrella organisations are still inadequate. Some communities are sceptical to be engaged in tourism, based on existing wildlife-human conflicts and previous experience of failed community based tourism projects. This has resulted in not only limited community participation in ecotourism investment, management and development but also limited share of tourism revenues generated from resources found in their areas.

3.1.3 Market penetration

Globally, tourism in becoming more competitive and therefore requires destinations to be better organised, planned and managed in order to penetrate new markets. This is especially so in ecotourism where the visitors are usually more informed and demand for authentic products and learning experiences. However, most member states lack aggressive eco-marketing strategies to be able to penetrate the international market that is highly competitive and the domestic market which has not yet been tapped into. There is limited innovative ecotourism product development which has resulted in regional countries offering similar or nearly similar products hence competing amongst themselves and reducing their comparative advantage in the market.

More so, the region is negatively perceived in the international market as an ecotourism destination due to the actual and perceived unstable political, safety and security situations, coupled with disease, famine and poverty issues. This situation has curtailed any efforts by countries to penetrate new markets since international tourists are very 'sensitive' to negative travel advisories issued by governments in the source markets especially in America, Europe parts of Asia and Australia.

On the other hand, there has been limited attention given to penetrating the domestic and regional ecotourism market. Most marketing and product development has been oriented to the 'western' world market ignoring the interests and potential of the market at 'home' which, in most cases, is not aware of the benefits of engaging in ecotourism.

3.1.4 Limited product development and diversification

As noted above, there is still limited tourism product development especially in the ecotourism section. Most products are still wildlife based mainly relying on wildlife/ nature safaris, in the case of Kenya Uganda and Sudan, on historical tourism in Ethiopia and marine tourism in Djibouti. Inadequate efforts and funds have been dedicated to innovation and market research with a view of diversifying ecotourism products that would increase the competitiveness of the individual member states and the region in general.

3.1.5 Limited financial incentives

Most member states governments have provided some incentives to the tourism industry (such as tax holidays, tax waivers on tour cars, and access to funding) but they are still low compared to those offered to other sectors like manufacturing industries. Important to note is that existing incentives do not specifically target ecotourism, which in most requires long term funding since the establishments are small and the pay back period is longer compared to 'conventional main stream' tourism investment. Financial institutions, such as banks and insurance companies, in order to minimize financial risk mainly target short term urban property markets and mainstream tourism investments. This approach neglects many ecotourism enterprises, which are considered 'high risk' since they are often in rural locations, using local building material (most ecotourism lodges use grass, poles and timber), and in some cases managed together with the indigenous community who are considered none professionals.

3.1.6 Inadequate research and skills base

Although each member state has at least a tourism training institution, research and skills development in tourism and ecotourism in particular is still limited. Most institutions do not give high priority to tourism research hence more attention is given to tourism teaching. On the other hand governments and research organisations do not prioritise the funding of research in field of tourism.

Skilled human resource at the various levels in the tourism industry remains low mainly because of limited government support in enhancing tourism training in public institutions. Few private organisations have invested in tourism and hospitality training because it is more specialised and expensive compared to other mainstream education disciplines. Even where the human resource has been trained, it is poor quality in most cases due to unregulated training institutions, poor training standards, and lack of a professional and practical oriented curriculum. This in turn negatively affects the quality of service and visitor satisfaction which is counter productive to the development and promotion of ecotourism.

3.1.7 Inadequate infrastructure stock

The region faces a severe infrastructure deficit not only in terms of quantity but also quality. The deficit involves presence of many poor and below standard roads, water, sanitation, power, telecommunications and air transport systems. This constraint is even more severe for ecotourism destinations which are mostly found in rural and inaccessible areas where authentic natural and cultural resources can only be found. The few existing infrastructure in rural areas are usually deteriorated and in most cases near collapse. This limits the competitiveness of the member states and region in general to attract eco-tourists in comparison to other destinations in Africa and beyond.

As a result of the above constraints, member states and the region suffers from a weak, poorly coordinated, less competitive, poorly funded, inefficiently planned and managed tourism industry which is very vulnerable to external shocks caused by socio-economic changes in the tourist source markets. In order for ecotourism to take root in the region, the above constraints have to systematically be addressed at local, regional, national and sub regional levels.

3.1.8 Environmental degradation

Owing to the high population growth rate and high incidence of poverty, there is increased unsustainable utilisation of natural resources such as forests (deforestation), soils (loss of fertility and soil erosion), rangelands (overgrazing) and marine resources (pollution and over harvesting of resources). This has created pressure on protected areas from the surrounding communities which view them as the only unspoilt resource areas to sustain their livelihoods. Eritrea, Uganda and Sudan are among the countries with severe land degradation (IGAD 2009). This situation has been compounded by climate change which is characterised by drought, floods and increased temperatures. More so, due to lack of zoning and proper land use planning, in some cases development of unplanned tourism facilities and activities have resulted in negative environmental impacts, destroying the very resources that sustain the tourism industry. Environmental degradation therefore pauses direct threat to the development of ecotourism which mainly relies on the natural environment attractions and products.

4.0 Opportunities for growth of Ecotourism in IGAD region

Despite the above constraints and challenges faced by ecotourism in the IGAD region, there are numerous opportunities that can be exploited to enable ecotourism flourish in the region, as discussed below:

1. Ecotourism is increasingly becoming a popular form of responsible travel, especially with increasing environmental conservation awareness and concern about global warming and climate change. The IGAD countries have many unexploited resources that can be developed to tap into this growing market. Most parts of the region are not yet heavily visited and some not even visited at all by tourists. This means most areas have a high potential to offer authentic and memorable ecotourism experiences - if well planned and managed.

2. The region already has a number of ecotourism initiatives that have operated over the years and contributed to the development and promotion of ecotourism in some member states. Efforts and experience of organisations such as Ecotourism Kenya (EK), Ecotourism Association of Ethiopia (EAE), and UNESCO's Biosphere Reserves programme all the provide an enormous opportunity for other countries and the region to develop ecotourism. These associations have developed ecotourism guidelines, codes of conduct, training materials and even implemented an eco-rating scheme as in the case of Ecotourism Kenya. They have also worked with and supported a number of ecotourism sites from which other countries can learn, not only from their success but also from their mistakes. Emphasis should be placed on increasing supporting ecotourism Small and Medium Enterprises (SME's) which can immensely contribute to increased multiplier effects, reduce leakages and help minimise human-wildlife and land use conflicts.

3. There is a high potential of developing attractive and diversified ecotourism products when linkages between tourism and other sectors is strengthened. This offers opportunities for member stares developing products where they have a high comparative advantage such as: Ethiopia (Culture & heritage, nature based – wild coffee, wildlife, faith based tourism); Djibouti (marine – scuba diving, Geological, culture & heritage); Kenya (wildlife – safari, culture & heritage); Uganda (nature – mountain gorillas, chimpanzees, Culture & heritage) among others.

4. Member states are steadily attaining macro and micro economic stability which is being reinforced by gains made in peace and security. This offers an opportunity for the region to attract ecotourism investment from within and outside the region. The current under development of the ecotourism sub-sector in the region offers a short term advantage in that there is less competition, which increases the chances of investors in the sector to easily break even in a relatively short time. There are a number of potential areas in which ecotourism investment can be made in collaboration with the community (indicated in Box 4.1) once adequate research and development is carried out on each prospective area.

Box 4.1: Potential areas of Ecotourism investment in IGAD

- Wilderness Luxury tented camps
- Forest eco-lodges with related facilities such as canopy walks
- House boats and cruise launches on rivers and lakes in the region
- Health spas in hot spring areas
- Sport fishing with related facilities
- Beach eco-resorts
- Walking safaris/nature walks in wilderness
- White water rafting and related water based sports
- Private wildlife reserves /game ranches
- Agro-tourism with related facilities
- Avi-tourism with the related facilities
- Faith based tourism
- Stop over eco-facilities en-route to attractions or national parks along major tourism circuits
- Mountaineering and related supporting facilities
- Cultural museums and cultural interpretation centres
- Historical sites and interpretation centres
- Field based ecotourism training centres that can be used by tourists, researchers and students
- Internal and regional transport services to national parks and other destinations

5. As earlier noted most member states receive a relatively high number of their international visitors from within the region and other neighbouring countries. This offers an opportunity for the region to target the regional ecotourism market by designing and marketing ecotourism products that meet the needs and interests of regional tourists. Existence of transboundary resources such as national parks, forests, mountains, rift valleys and rivers provide great potential of attracting eco-tourists across national borders and enhancing regional tourism development initiatives. Domestic tourism market, which is also not fully tapped into, should be targeted to promote domestic ecotourism travelling.

6. The existing regional bodies such as AU, NEPAD, UNECA and IGAD offer a strong foundation and opportunity to advocate promote and solicit for funding of ecotourism among member states. The already existing tourism frameworks, such as the AU/ NEPAD Tourism Action Plan, should be embraced by governments to help nurture ecotourism and the tourism industry in general. This can be achieved by involving all IGAD structures (Assembly of Heads of Governments, Council of Ministers, Committee of Ambassadors and the Secretariat) in the ecotourism development drive. When planning and implementing various development programmes, various coordinating units and programmes at the IGAD secretariat should be encouraged to ensure they provide a favourable environment for ecotourism development.

5.0 Ecotourism Growth Drivers

In order for the above opportunities to be tapped into, the following key success factors must be in place for the ecotourism promotion and development to take place. The major ecotourism growth drivers include:

1. Government support. Governments play a very critical role in the planning, monitoring, regulation and resource allocation to the tourism industry. Therefore government recognition, will and support are vital for ecotourism to succeed. Public-Private Partnerships especially in SME's should be encouraged to foster development tourism development.

2. Community awareness and involvement. To develop authentic and unique ecotourism that contributes to socio-economic development, community members and leaders have to be fully involved in the investment, management and sharing of not only the benefits but also the opportunities ecotourism has to offer. This can only be achieved if the communities are able to identify the potentials in their areas and are aware of their rights and obligations when engaging in ecotourism projects.

3. Private sector awareness and involvement. Tourism is increasingly private sector led. Therefore the success of ecotourism will depend on the level of awareness, commitment and involvement of the private sector since they are largely the ones to invest, manage and market the sector.

4. Incentives for ecotourism. Unlike the conventional mainstream tourism, ecotourism, for example investment in an eco-lodge, tend to have a longer investment pay-back period compared to a hotel or guest house in an urban area. It also involves investment in renewable energy, eco friendly waste management, training the local community among others which are all expensive ventures. Therefore for ecotourism to succeed specific incentives in form of financial incentives, eco-ratings, eco-awards, rewards and general recognition for their efforts should be put in place.

5. Ecotourism research and development. There is need for specific research to guide and inform ecotourism product development, visitor satisfaction, marketing, formulation of guidelines and codes of conduct.

6. Ecotourism statistics. Coupled with research, specific sets of statistics have to be collected to inform investment, planning and management of ecotourism. Currently, data is generally collected on few aspects such as tourist arrivals, hotel bed occupancy and in some instances tourist expenditure.

7. Domestic and regional ecotourism markets In order for tourism to sustainably develop and remain resilient to external shocks, domestic and regional tourists should be oriented to participate in various sub sectors of the industry such as ecotourism. Member states should encourage, sensitise and empower citizens within their countries to not only travel within their countries and region, but get involved in activities that support, advocate and encourage practising of ecotourism principles.

8. Peace and Security. Countries should closely work together to ensure situations that can result in destabilising peace and security in the region are avoided or quickly resolved. This includes working together to avert external threats like piracy on the Indian Ocean.

9.   <u>Coordination of all stakeholders</u> in the region to fully play their roles as indicated in Box 5.1 below.

Box 5.1: Ecotourism stakeholder roles

Government

- Planning, policy and industry coordination, regulation and monitoring with specific reference to ecotourism
- Improvement and provision of infrastructure in areas with ecotourism resources and potentials
- Ensure conservation of natural and cultural resources
- Enhance training, research and collection of data/statistics on ecotourism
- Carry out ecotourism promotion and marketing through national tourism marketing boards

Private sector

- Forging partnerships with CBOs engaged in ecotourism
- Contribute to institutional capacity building in ecotourism
- Ecotourism product development & service quality assurance
- Human resource support – training and upgrading with bias in ecotourism
- Engage community in co-owning and managing ecotourism enterprises
- Carry out ecotourism promotion and marketing

Academic and research institutions

- Design ecotourism curriculum for various educational levels
- Teach and train human resource in ecotourism
- Carry out research in ecotourism
- Disseminate and publish research ecotourism findings
- Contribute to setting up and managing of an ecotourism database

Communities

- Organise themselves into viable community organisations
- Identify potential ecotourism resources, attractions and services
- Exploit opportunities for ecotourism financing and training
- Seek and enter into partnership with established private sector players
- Actively participate in decision making with respect to ecotourism development
- Civil Society Organisations/NGO's
- Support overall ecotourism policy objectives
- Participate in ecotourism strategy implementation
- Play active advocacy role for ecotourism
- Continued assisting community based tourism – education and training
- Support and provide technical assistance to communities
- Attract donor funding to communities with ecotourism projects
- Support community based tourism organisations like UCOTA, KECOBAT to champion the ecotourism drive
- Formulate and popularise ecotourism codes of conduct
- Sensitise tourism operators on ecotourism practices and principles
- Contribute to development of ecotourism through funding, volunteering, advocacy

6.0 Recommendations and way forward for Ecotourism Development in IGAD region

6.1 Recommendations

6.1.1 Government ecotourism prioritization

Governments of IGAD member states need to recognise and prioritise the ecotourism sub-sector given its potential contribution not only to socio-economic development but also for its positive spin-off contributions such as reinforcement of peace and stability in the region. Therefore there is need for increased government will, support and funding for ecotourism sub-sector, to ensure a favourable operational and regulatory environment. This will enable tourism industry reforms, encourage inter-sector linkages, and enable full implementation of existing laws and policies. Priority should also be given to increasing accessibility (airports, roads, communication) of areas with a high ecotourism potential.

6.1.2 Policy, Legal and Regulatory frameworks

The existing tourism policy, legal and regulatory frameworks of member states should be harmonised to ensure that the principles and concerns of ecotourism are explicitly articulated. Emphasis should be placed on ensuring Public-Private Partnerships (PPP) on a win-win basis through:

- Establishing policy mechanisms to promote formation, licensing and accreditation of tourism associations.
- Enactment of conducive sustainable tourism legislation in consultation with private sector.
- Ensure representation of stakeholders (especially private sector) on government policy formulation bodies to give input on tourism industry needs and gaps.
- Establish a consultative forum (both at national and Intergovernmental level) between government and key tourism stakeholders.
- Supporting local entrepreneurs to invest in medium and large scale sustainable tourism businesses.

Specific emphasis should also be placed on developing regional ecotourism guidelines and regulations with focus on streamlining:

- Requirements for investment in ecotourism and the conditions you should fulfill before establishing an ecotourism destination or provide services to eco-tourists.
- Codes of conduct for eco-destinations and service providers.
- Involvement of communities in ecotourism ventures – especially in Small and Medium Enterprises (SMEs).
- Benefits and opportunities sharing mechanisms for those involved in ecotourism especially the community.

- Sensitisation of all stakeholders on the principles, benefits potential and 'dangers' of ecotourism.
- Monitoring and evaluation of tourism developments by institutions both at a national and regional (IGAD) level.
- Enhance e-tourism through the application of ICT in sustainable tourism management and development.

6.1.3 Planning, development and marketing of ecotourism

IGAD, with support from regional organisations such as UNECA, need to form a regional tourism council or committee composed of national tourism authorities/boards, private sector umbrella organisations, umbrella community and civil society organisations, and tourism training institutions. This regional council or committee which should place specific emphasis on ecotourism and tasked to:

- Coordinate the harmonisation of tourism policies and laws in member states relating to ecotourism.
- Encourage and strengthen inter-regional cooperation between government institutions on matters relating to ecotourism.
- Strengthen existing regional conservation and tourism networks such as UNESCO Biosphere Reserves.
- Increase the competitiveness of the ecotourism sub-sector and popularise it by marketing it as a *niche* product.
- Promote joint regional and cross-border ecotourism marketing and product packaging.
- Establish clear sustainable and ecotourism performance indicators.
- Develop ecotourism branding mechanisms – for instance encouraging establishment of more international recognized UNESCO biosphere reserves among member states.
- Encourage all member states to form umbrella ecotourism associations.
- Guide ecotourism product innovations and development as a drive to product diversification.
- Encourage and promote domestic and intraregional ecotourism travel through incentives, sensitisation and marketing.
- Develop regional ecotourism standards and codes of conduct.
- Monitor and regulate tourism training quality and standards – ensure ecotourism is substantially covered in curriculum.
- Implement the Tourism Satellite Accounts (TSA) system to ensure accurate and harmonised data collection, not only on tourism in general but also on ecotourism in particular.
- Develop regional ICT based ecotourism information system and establish ecotourism interpretation centres.
- Encourage coopetition[2] rather than competition among member states and tourism operators engaged in ecotourism in the region.

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2   Coopetition is a term describing a situation where companies despite competing against each other

- Enhance conservation and management of resources – especially transboundary resources.

For lessons and experiences reference can be made to existing regional bodies such as 'Regional Tourism Organisation of Southern Africa' (RETOSA) under Southern Africa Development Community (SADC) and the East Africa Tourism Council under the East African Cooperation (EAC).

6.1.4 Research and Development

In order for ecotourism to develop in the region, priority and funding should be given to research and development in the field of ecotourism. There is urgent need for research in ecotourism on market intelligence, product development, customer satisfaction, policy implications, information flow and sharing among others. To achieve this, an Ecotourism Research Network should be established to link up tourism research and training institutions, out of which centres of excellence should be identified and supported in each member state. Existing institutions such as Utaali College in Kenya and Hotel and Tourism Training Institute in Uganda should be supported and developed to serve as an IGAD regional hospitality centres of excellence. More so incentives should be provided to the private sector to establish tourism training facilities and institutions which should not only focus on skills development but also on research. A regional ecotourism database should be developed to disseminate participatory generated information and data through publications and an on-line ecotourism information system. This information should be packaged and accurately communicated to various target groups depending on their information needs.

6.1.5 Community empowerment

IGAD should work in strong collaboration with umbrella community organisations in member states such as UCOTA in Uganda, KECOBAT in Kenya and NGO's such as TESFA in Ethiopia. These and other associations should eventually form a regional community tourism association with mandate to:

- Sensitise, train and empower community leaders in ecotourism management skills.
- Stimulate local entrepreneurship through human resource capacity building, availing financial resources and using the 'incubator' approach to encourage indigenous initiatives.
- Encourage private sector-community ecotourism investment and management partnerships.
- Develop guidelines for communities on how to engage private investors in management of community ecotourism enterprises.
- Encourage small and medium scale community ecotourism enterprises e.g. craft making groups, performing arts groups.

cooperate to achieve common business objectives

- Empower communities to participate in decision making at all levels of tourism development.
- Put in place mechanisms to preserve, maintain and restore authentic culture to avoid cultural commercialisation of communities who engage in tourism.

6.1.6 Financial incentives and funding for ecotourism initiatives

Specific incentives and funding mechanisms should be put in place by government to promote ecotourism initiatives in the region, otherwise investors will continue opting for conventional mainstream tourism enterprises. When governments are providing incentives to the tourism industry, priority should be given to ecotourism operators, who, depending on the prevailing circumstances, should benefit from capital and operating cost reduction incentives such as; tax holidays, reduction or deferrals, low interest loans, interest rebates, training grants, land donations or leasebacks, equity participation (where government becomes an equity investor by buying shares in the project) and collateral guarantee.

However, a mechanism should be put in place where the incentives are offered based on ecotourism performance criterion with a points/units cumulative system. In other words, an enterprise qualifies for more incentives based on its performance with regard to implementing a range ecotourism principles and practices. This will help make the incentive system more competitive and efficient, unlike in some instances where it has been abused by some operators who want to unfairly benefit when general or blanket incentives are offered to the tourism industry. More so, incentives should be provided for stakeholders to encourage proper record keeping, data collection and submission.

Apart from incentives, both the public and private sector need to design strategies to attract capital inflow from financing institutions like banks and through Foreign Direst Investment (FDI) in the tourism industry. This can be achieved by governments either setting up intervention measures to encourage banks finance tourism projects, or by government directly mobilising the finances. For instance in Kenya, the government through a joint initiative with European Union (EU) established the Tourism Trust Fund (TTF) in 2001 and has since then funded 48 projects covering a broad spectrum of communities and various facets of the tourism industry. Such model of funding can be replicated at a regional level with specific emphasis given to supporting community and small and medium scale ecotourism enterprises.

Increased investment in sustainable tourism and in ecotourism in particular should be triggered by:

- Governments prioritising and main streaming sustainable tourism in their investment policies.
- Creating a conducive local investment environment by eliminating risk factors.
- Increasing tourism infrastructure development.
- Improving political environment, security, law and order.
- Ensure a clear and transparent tax and incentives system.
- Have longer licensing timelines to allow recouping of investments.
- Establish an investment protection and dispute settlement mechanism.

6.1.7 Environmental conservation

Existing policy and regulatory frameworks need to be strengthened to ensure that the natural resources are not depleted by the increasing population among member states. Measures should be put in place to ensure that other sectors such as crop growing, livestock farming and tourism itself do not develop at the expense of nature conservation. Environmental management mechanisms and tools such as Environmental Impact Assessments (EIA), Environmental Auditing (EA), carrying capacity, Limits of Acceptable Change (LAC), Visitor Impact Management (VIM) among others should be applied to avoid negative environmental impacts. Specific focus should be given to climate change mitigating and adaptation strategies.

6.2 Way forward

In order for the IGAD region to tap into the existing tourism and ecotourism potential, a Tourism Master Plan (TMP) could be formulated for sustainable tourism with focus on ecotourism.

However, a more detailed and comprehensive study on ecotourism is required to include a higher number and categories of stakeholders in the tourism industry. More country field visits (covering all member states), consultations and secondary data collection processes would need to be conducted to ensure that all views and opinions of all stakeholders are captured and later reflected in the master plan. A feedback mechanism should be in-built in this process to ensure that all stakeholders' views are taken into consideration. Extensive consultations are very important since member states are at different stages of tourism development and there is need for validation of the findings at various levels.

As the Tourism Master Plan is devised, linkages should be drawn to the other studies that have been carried out on tourism in the African region and studies carried out on ecotourism in other areas. There should be a deliberate effort to draw lessons from countries that have over the years been engaged in developing ecotourism, such as the Seychelles, South Africa, Costa Rica, Brazil, France, and Australia among others. Experiences should also be drawn from RECs (such as SADC and EAC) that have put in place mechanisms to promote tourism as a vehicle for development. National and International ecotourism organisations, such as the International Ecotourism Society (TIES), French Ecotourism Association, the *Ecotourism Society* of *Seychelles* (TESS), among others, also have a wide range of experiences and challenges to learn from.

6.2.1 Content to populate IGAD Tourism Master Plan

The IGAD Tourism Master Plan (TMP) would provide an integrated approach to achieve specific regional objectives in the ecotourism sub-sector. It would contribute towards producing a more distinctive image of member states and the region as a whole as an ecotourism destination contributing towards community development, enhancing educational experiences, enhancing environmental conservation as well as regional integration. The master plan would therefore make provisions for the formulation of an ecotourism strategic plan for the region that would include policy components for member states.

The proposed outline for the TMP could revolve around the following blocks:

1. Situational analysis

    The TMP would enable the conducting of an in-depth situation analysis on the existing and potential ecotourism resources, products and market. The existing policy legal and regulatory frameworks, marketing and promotion approaches, human resource development programmes, research and development, would be further analysed for consistence with ecotourism principles and practices. This will provide a clearer picture of the existing planning and management gaps that may inhibit the development of the ecotourism within in tourism industry

2. Strategic interventions and actions

    Strategic interventions on sustainable tourism could be part of the TMP such as:

    *   Creating an enabling sustainable tourism regulatory framework.
    *   Strengthening institutional capacity, organisation and coordination of sustainable and ecotourism activities and stakeholders.
    *   Promoting and marketing of ecotourism as a specific 'niche' market.
    *   Ensuring quality in ecotourism education, training and human resource development.
    *   Promoting sustainable and ecotourism research and development initiatives.
    *   Ecotourism product development and quality assurance.
    *   Ecotourism investment and infrastructure development.
    *   Engaging the indigenous communities in the planning and management of ecotourism enterprises in their areas.

3. Master plan implementation

    While designing mechanisms through which the TMP would be implemented, specific reference could be given to:

    *   Categorising sustainable tourism and identifying stakeholders ranging from National Tourism Organisations, to private sector to small scale community tourism enterprises.
    *   Assigning roles and responsibilities to each of the stakeholder groups based on their interests, capacities and resources.

- Designing implementation work /activity plan and timeline/road map – achievement of positive results from ecotourism may require intensive sensitisation since it is a relatively new sector. Therefore implementation time line should take into consideration the uniqueness of ecotourism.

4. Ecotourism Master plan monitoring and evaluation

In order to avoid 'greenwashing' and the related negative impacts that can result from unsustainable tourism, there is need for specific strategies and mechanisms that should include in the TMP. These would include visitor management strategies, carrying capacity thresholds, visitor and investor codes of conduct, eco-rating and performance audit bench marks among others. Roles of stakeholders in monitoring and evaluation of ecotourism establishments should clearly be spelt out especially for the communities.

5. Financial planning

As earlier indicated in section 3.1.5 sustainable and ecotourism enterprises are constrained by lack of funding since it is considered by financial institutions as high-risk business. Therefore, the TMP could put in place mechanisms to help identify and mobilise financial resources from organisations, institutions, and governments which are committed to investing in ecotourism – it is increasingly being referred to as 'green-capital'. A specialised financial audit and accountability system would be designed for resources mobilised and disbursed in ecotourism ventures.

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Appendix 1 - Approach and Methodology of the study

In order to attain a snap shot of the ecotourism sub-sector in the IGAD region, the study carried out data collection using both primary and secondary methods. Visits were made to Kenya, Ethiopia, Uganda and Djibouti (including the IGAD headquarters), between November 2010 and January 2011.

During the visits in-depth interviews were held with a variety of tourism stakeholders in the respective countries. These included officials from Ministry of Tourism, private sector operators (lodge owners, tour and travel operators) leaders of tourism umbrella organisations, leaders of Community Tourism Organisations, members of civil society organisations and officials from Regional institutions such as IGAD and EAC. Where face-to- face interviews were not possible online semi-structured interview questions were emailed to the respondents.

Field visits were also made to some tourism destinations where informal interviews and discussion were held with some tourists and destination managers/supervisors about the trend, impacts and challenges in tourism industry. During these visits observations were physically made to determine existence of eco-practices such as proper waste management, environment conservation practices and involvement of the local community.

In order to complement the data collected from respondents, literature was reviewed from a number of reports, surveys and publications of government institutions, civil society organisations, community organisations, national umbrella organisations and private sector operators. Official websites of these organisations together with those of international organisations (such as UNWTO, UNdata, and International Ecotourism society) were visited and a lot of information gathered (see References).

Appendix 2 - International Tourist Arrivals from selected IGAD member states

Country	2005	2006	2007	2008	2009
Djibouti	30,250	39,500	48,700	53,600	58,425
Ethiopia	227,398	339,026	357,841	383,399	422,870*
Kenya	1,479,000	1,600,700	1,816,800	1,203,200	1,490,400
Sudan	246,000	-	436,000	441,000	420,000
Uganda	468,000	536,000	642,000	844,000	817,000

Source: Member states ministry of tourism statistics
* Estimates

Tourism Receipts (USD) from selected IGAD member states (Million US $)

Country	2005	2006	2007	2008	2009*
Ethiopia	139	170	214	205	225
Kenya	647	779	972	762	808
Sudan+	89	126	262	331	299
Uganda	327	375	449	590	600

Appendix 3 - Tourism conservation areas and attractions in IGAD member states

Country	National Parks	UNESCO sites	Other features
Ethiopia	• Abidjatta-Shalla • Awash • Bale Mountains • Gambela • Mago • Nechisar • Omo • Semien Mountains • Yangudi Rassa	Heritage Sites • Axum's Obelisks • Hadar (where the skeleton of Lucy was discovered) • Monolithic Churches of Lalibela • The Castles of Gondar • Tia's carved standing stones • The Omo Valley • The Semien National Park • The walled city o f Harar Biosphere Reserves • Kafa • Yayu	• Blue Nile • Mountains -
Sudan	• Dinder • Bandingilo • Boma • Lantoto • Shambe • Southern	Heritage Sites • Gabel Barkal • 5 archaeological sites of Napatan Region Biosphere Reserves • Dinder • Random	• Confluence of Blue and White • Beaches along the Red Sea
Uganda	• Bwindi Impenetrable • Kibale • Kidepo Valley • Lake Mburo • Mgahinga Gorilla • Mount Elgon • Murchison Falls • Queen Elizabeth • Rwenzori Mountains • Semuliki	Heritage Sites • Bwindi Impenetrable National Park • Rwenzori Mountains National Park • Kasubi Tombs of Buganda Kings Biosphere Reserves • Queen Elizabeth • Mount Elgon	• Source of river Nile • Mountains – Rwenzori, Elgon, Muhavura
Djibouti	• Day Forest • Djibouti National Park • Yoboki		Scenic beaches along Red Sea coastline

Country	National Parks	UNESCO sites	Other features
Kenya	• Aberdare • Amboseli • Arabuko Sokoke • Central Island • Chyulu Hills • Hell's Gate • Kisite-Mpunguti Marine • Lake Nakuru • Malka Mari • Malindi Marine • Marsabit • Meru • Mombasa Marine Park • Mount Elgon • Mount Kenya • Mount Longonot • Nairobi • Ol Donyo Sabuk • Ruma • Saiwa Swamp • Sibiloi • Tsavo (East and West sections) • Watamu Marine	Heritage Sites • Lake Turkana National Park • Lamu Old Town • Mt. Kenya National Park • Sacred Mjikenda Kaya forests Biosphere Reserves • Mount Kenya • Mount Kulal • Malindi-Watamu • Kiunga • Amboseli • Mount Elgon	
Somalia	• Lag Badana • Jilib • Hobyo grasslands and shrublands • Daallo Mountain		