



United Nations  
Economic Commission for Africa

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## **21<sup>st</sup> Intergovernmental Committee of Experts**

### **Transformative Growth in Eastern Africa: *Catalysts and Constraints***

Venue: Moroni, Union of Comoros

Dates: 7-9<sup>th</sup> November 2017.

### **Policies to Enhance the Competitiveness of the Tourism Sector**

## I. Background

The tourism sector is a mainstay of the regional economy in Eastern Africa. Valued at over USD 22.2 billion, and with an average share of GDP of 13.6%, it is estimated that 6.3 million people are employed in the sector (about 13.3% of the total workforce). These facts notwithstanding, when compared to the rest of the world, tourism development has been sluggish despite the immense opportunities that exist. This could be attributed to the general lack competitiveness across the continent (with a few exceptions<sup>1</sup>) that has meant that Africa, and more particularly the region, is not able to realise its full tourism potential. In fact, a study on Africa's tourism competitiveness suggests that given the increased global competition, failure to address issues related to destination competitiveness in a *proactive and innovative manner* could have serious implications for the sector in future.<sup>2</sup>

The World Economic Forum's (WEF) Travel and Tourism Competitiveness Index (TTCI) which is published biennially provides a tool with which to gauge the competitiveness of tourism industry in Africa. The TTCI measures *the set of factors and policies that enable the sustainable development of the travel and tourism sector, which in turn contributes to the development and competitiveness of the country*<sup>3</sup>. The table below shows the ranking for select Eastern Africa Member States since 2007.

**TTCI Ranking for Select EA Countries 2007-2017**

	2007 (out of 124)	2011 (out of 139)	2015 (out of 141)	2017 (out of 136)
Burundi	123	137	135	134
DRC	-	-	-	133
Ethiopia	117	122	118	116
Kenya	98	103	78	80
Madagascar	112	127	121	121
Rwanda	-	102	98	97
Seychelles	-	-	54	-
Tanzania	80	110	93	91
Uganda	101	115	114	106

Source: WEF TTCI 2007-2017

<sup>1</sup> There are few countries in the continent that have very competitive tourism sectors

<sup>2</sup> Heath, E (2002). Towards a Model to Enhance Africa's Tourism Competitiveness. *Journal of Public Administration*. 37 (3) 327-353

<sup>3</sup> The index comprises four sub-indices i.e. Enabling Environment, Policy and Enabling Conditions, Infrastructure and Natural and Cultural Resources. The sub-indices further comprise a set of pillars (14 in total) each with a specific set of indicators (90 in total). See WEF 2015 Travel and Tourism Competitiveness Index

From the table above, it is evidently clear that there are serious competitive concerns and countries do not appear to be significantly improving their respective rankings. The generally low rankings of Eastern African countries are attributable to a number of issues including, security-related concerns, lack of skills, poor standards, infrastructure issues and lack of a conducive policy environment. The prevailing scenario in the region could, therefore, be attributed to the possibility that the rest of world is doing more to address the competitiveness-related issues or that there are not enough concerted efforts in the region to address these issues or perhaps a combination of both. Regardless of whichever holds true, it is crucial that urgent measures are put in place so that the region is able to maximise opportunities emerging from tourism development, given the immense opportunities that exist.

A major challenge to addressing the competitiveness issue has been the general lack of prioritisation of the tourism sector amongst Member States. In fact, very few countries have fully fledged tourism ministries, while in others, tourism has been combined with other sectors<sup>4</sup>. This has, therefore, meant that the appropriate attention has not always been accorded to the sector, despite the fact in some countries tourism is a key a driver of both economic growth and development. Hence, whereas the rest of the world, especially the emerging destinations of Asia and Middle East, continue to invest heavily in their respective tourism sectors, which has greatly improved their competitiveness, this has generally not been the case in the region.

## II. Objectives of the Session

On the basis of the foregoing, the main issues to be discussed in this session will include:

- **Prioritisation of the tourism sector in Eastern Africa** - as highlighted above, this will be crucial for the success of any efforts to address the competitiveness issue in Africa. The discussions will focus on the key issues impeding the prioritisation of the sector with a view to proposing recommendations that could be adopted at the national, regional and continental level in line AU Agenda 2063.
- **Identification of key competitiveness issues** - this will be necessary to enable the identification and ranking of key challenges at the national, regional and continental levels. For instance, issues relating to security may require regional and/or continental reflection, whereas issues relating to product development may require a national approach.

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<sup>4</sup> Mostly transport and natural resources or as a department/directorate under a parent ministry.

- **Mapping of key competitiveness issues** - following the identification of and ranking of key issues, it will be necessary that these are mapped within the region given that priorities may have geographical dynamics in the sense that some issues may be unique to some countries or group of countries.
- **Exploration of potential interventions** - in line with the above, potential interventions at national and regional levels will also be discussed. This will enable a debate on the best way forward to addressing the competitiveness issue in the region from which key recommendations could be derived that could form the basis for a potential strategy.

### III. Participation

The session will gather experts from Eastern African countries, as well as representatives of the private sector, civil society organizations, and other relevant institutions. For further information and clarification, you may wish to contact the following UNECA/SRO-EA focal point for the session: Mr. Geoffrey Manyara, Email: [manyara@un.org](mailto:manyara@un.org);

### IV. Provisional programme

**11:15 – 13:00** Panel on Policies to Enhance the Competitiveness of the Tourism Sector

**Presentation by Geoffrey Manyara** – An Overview of Tourism  
Competitiveness in Eastern Africa

**Panellists:**

Carmen Nibigira – Private Sector Perspective

Joseph Rwanshote – IGAD Perspective

Jacinta Nzioka – Kenya Country Perspective

Sissay Getachew – Ethiopia Country Perspective

Ousman Abdi – Djibouti Country Perspective

## References

1. Sustainable Tourism Master Plan for the IGAD Region:

[https://www.uneca.org/sites/default/files/PublicationFiles/uneca\\_stmp2013.pdf](https://www.uneca.org/sites/default/files/PublicationFiles/uneca_stmp2013.pdf)

2. Sustainable Tourism Master Plan for the Federal Democratic Republic of Ethiopia:

<https://www.uneca.org/publications/%EF%BF%BCsustainable-tourism-master-plan>

3. African Union Agenda 2063 First Ten Year Implementation Plan 2014-2023:

<http://www.un.org/en/africa/osaa/pdf/au/agenda2063-first10yearimplementation.pdf>

4. World Economic Forum Travel and Tourism Competitiveness Index 2007 – 2017:

<https://www.weforum.org/reports>

5. World Travel and Tourism Council: <https://www.wttc.org/research/>

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