



IGAD

SUSTAINABLE TOURISM MASTER PLAN 2024-2034





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STMP 2024-2034

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The formulation process of the STMP 2024-2034 was spearheaded by Rayviscic Mutinda, under the direct supervision of Geoffrey Manyara and guidance by Zacharia Kingori (IGAD) and Emelang Leteane, Head of Sub-Regional Initiatives of SRO-EA. Mama Keita, the Director of SRO-EA, and Osman Babikir, the IGAD Director of Economic Cooperation and Regional Integration, provided overall leadership for the process. Their commitment to the timely delivery of the STMP is commendable and highly appreciated.

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The formulation of the Sustainable Tourism Master Plan (2024-2034) was extensively consultative, drawing valuable inputs from a wide array of tourism stakeholders, including representatives from the public sector, private sector, academia, and civil society. IGAD and UNECA express their sincere gratitude to all the esteemed tourism stakeholders for the constructive criticism, insights, information, and advice have been instrumental in shaping this Master Plan.

FOREWORD



The Intergovernmental Authority on Development (IGAD) region holds immense tourism potential, positioning it to become a significant income generator and a key provider of employment opportunities. With its rich and diverse tourism assets, each IGAD member country offers unique experiences, from ancient archaeological sites and vibrant cultural festivals to diverse wildlife and breathtaking landscapes. As the cradle of mankind, the region boasts a heritage that should attract global attention. However, despite its vast potential, the region's share of global and continental tourist arrivals does not yet reflect this comparative advantage.

Nevertheless, tourism remains a vital economic pillar for most IGAD Member States, significantly contributing to GDP and job creation. This success is largely due to the region's socio-economic reforms and the dedicated efforts of its Member States, as evidenced by national and regional strategies and plans. Recognizing the importance of tourism, the IGAD Secretariat, through the IGAD Regional Strategy 2021-2025, has prioritized the competitive and sustainable development of the tourism sector. Increased investment in tourism is anticipated, which will further enhance its contribution to regional economic growth.

The IGAD Secretariat has developed the regional Sustainable Tourism Master Plan (STMP) 2024-2034 as a framework for sustainable tourism development in the region, aiming to promote socio-economic growth, alleviate poverty, and foster regional integration. Drawing on national, regional, continental, and global socio-economic development frameworks, the STMP 2024-2034 aspires to transform the IGAD region into an integrated, globally competitive, and sustainable tourism destination. It marks a significant milestone in the systematic development of IGAD tourism.

The successful implementation and monitoring of the STMP 2024-2034 will require strong involvement and commitment from Member States, the private sector, civil society, communities, and development partners. It is essential to recognize that there are no quick solutions, and the IGAD region must take decisive action now for tourism to become a significant industry in its development agenda, as envisioned in the IGAD Vision 2050.

Lastly, I would like to extend my deepest gratitude to the United Nations Economic Commission for Africa (UNECA), through their Sub-Regional Office for Eastern Africa, for the financial and technical assistance provided to the IGAD Secretariat for the preparation of the STMP 2024-2034. I also extend my sincere gratitude to all stakeholders who contributed in various ways to the successful development of this Master Plan. The IGAD Secretariat remains committed to supporting all efforts toward its successful implementation.

H.E. Workneh Gebeyehu (Ph.D.)
IGAD Executive Secretary



Executive Summary



EXECUTIVE SUMMARY

The IGAD region boasts a wealth of diverse tourism resources, with each country offering unique tourism experiences, ranging from ancient archaeological sites and vibrant cultural festivals to diverse wildlife and stunning landscapes. These diverse offerings make the region a compelling destination for travellers seeking authentic cultural experiences, adventure, and natural beauty. As the region further develops its tourism infrastructure and promotes cross-border initiatives, it is poised to become an increasingly sought-after destination for global travellers. With such resource base, the tourism industry remains a key economic pillar for the majority of IGAD Member States, significantly contributing to GDP and employment generation.

Despite this, the region's share of global and continental tourism arrivals does not reflect its comparative advantage. This fact informed the need, ten years ago, to formulate a regional tourism development framework – the Sustainable Tourism Master Plan (STMP) (2013-2033) – aimed at guiding sustainable tourism development across IGAD Member States. As the STMP 2013-2023 period concludes, the successes and shortcomings encountered offer valuable lessons for the formulation of the STMP 2024-2034.

VISION OF THE STMP 2024-2024

Anchored on a number of regional, continental and global socio-economic development frameworks, the STMP 2024-2034 seeks to position the IGAD region as a cohesive, globally competitive, and sustainable tourist destination.

AIM AND OBJECTIVES OF THE IGAD STMP 2024-2034

The primary aim of the STMP is to provide IGAD Member States with a regional framework for sustainable tourism development, contributing to socio-economic development, poverty alleviation and to promoting regional integration. Specifically, the STMP 2024-2034 seeks to achieve five objectives:

1. Identify strategic areas of cooperation in tourism development among the IGAD Member States
2. Identify appropriate strategies and actions that can enhance the competitiveness of individual IGAD Member States and, subsequently, the IGAD region as a global tourism destination.
3. Provide a detailed roadmap for the implementation of the STMP strategic actions.

4. Develop an efficient coordination mechanism for tourism development within the IGAD region.
5. Formulate a resource mobilization plan to ensure sustainable financing of the STMP priority programmes.

GUIDING PRINCIPLES OF THE STMP 2024-2034

The STMP adopts a stakeholder-led tourism planning and development approach that integrates decision-making with other economic sectors and incorporates the perspectives of key stakeholders, including government, private sector, academia, civil society and local communities. While designed to be goal-oriented rather than reactionary, the STMP is also adaptable to changes in both the internal and external tourism environment.

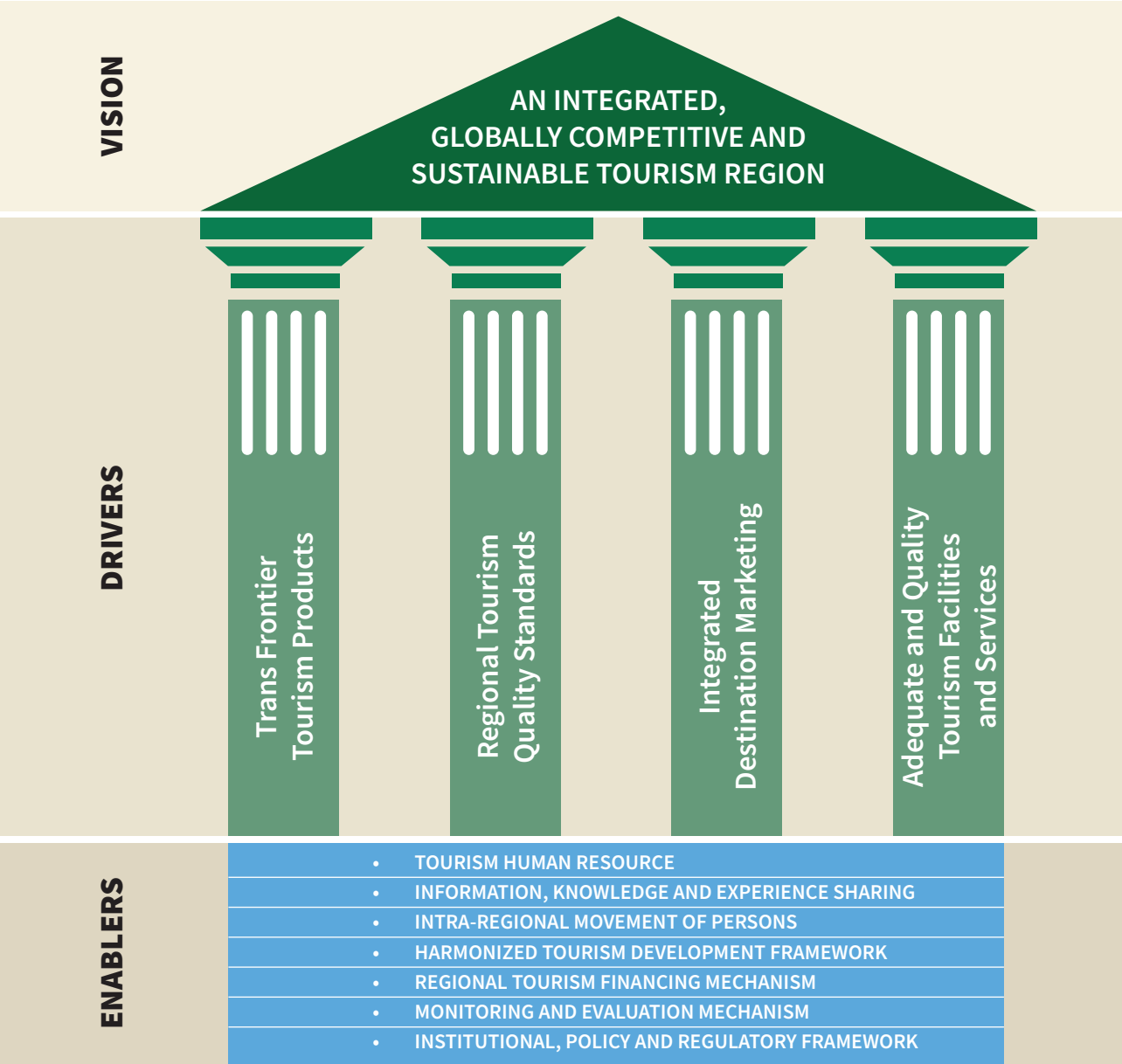
The formulation of the IGAD STMP 2024-2034 will be guided by the following principles:

1. The STMP should facilitate deeper regional integration within the IGAD region, aligning with IGAD's mission and broader goals to enhance collaboration and mutual benefits among Member States
2. The Master Plan should articulate a clear and compelling vision for tourism development in the IGAD region, and outline strategic interventions to achieve this shared vision
3. The STMP should strengthen the competitiveness of the IGAD region as a premier tourist region through targeted strategies that enhance attractiveness and market positioning
4. Tourism development strategies should be harmonized with the wider national, regional, continental, and international tourism and related sectoral initiatives to ensure coherence and maximize impact
5. The Master Plan should promote the principles of interdependence and mutual interest among IGAD Member States
6. The STMP should enhance local capacity for tourism development by implementing policies that support skills training, access to funding and markets, and integration into the tourism value chain.
7. The STMP should provide avenues to deepen partnerships in tourism development between the public and private sectors, development partners, and civil society
8. The development of tourism in the IGAD region should pursue an integrated approach with specific focus on developing and optimizing its value chain and creating policy-convergence and synergies with relevant economic sectors.



IGAD STMP 2024-2034 STRATEGIC DIRECTION

To realize the Vision of the IGAD STMP 2024-2034, it will be necessary to focus on key priority intervention areas that guarantee competitiveness and serve as key frameworks for sustainable and long-term tourism growth. In this context, the STMP will focus on four drivers of competitiveness and seven enablers, as provided in the Strategic Map below:



Each pillar is presented as a priority area and supported with appropriate strategic objective and actions.

STMP 2024-2034 PRIORITY AREAS, STRATEGIC OBJECTIVES AND STRATEGIC ACTIONS

PRIORITY AREA	STRATEGIC OBJECTIVES	STRATEGIC ACTIONS
PRIORITY AREA 1: TRANS-BOUNDARY TOURIST PRODUCTS	Develop integrated tourism products across the different IGAD Member Countries	Map potential flagship trans-boundary tourism products
		Formulate product development plans for trans-boundary products
		Implement flagship transborder tourist product development plans
PRIORITY AREA 2: REGIONAL TOURISM QUALITY STANDARDS	Establish uniform quality standards for the tourism sector across the IGAD region to enhance service consistency, improve visitor experiences, and promote regional competitiveness.	Develop unified quality standards for the tourism industry
		Create a Regional Quality Standards Certification Programme
PRIORITY AREA 3: TOURISM PROMOTION AND MARKETING	Market and promote the IGAD Member States as competitive destinations for both regional and international visitors	Formulate a regional tourism marketing strategy
		Pursue a unified promotional effort in the international marketplace
		Create a destination marketing strategy for the IGAD regional Market
		Develop a Destination Management System and a Tourism Portal
PRIORITY AREA 4: PROMOTING TOURISM INVESTMENT IN THE REGION	Promote the IGAD region as an attractive investment destination for tourism investors	Prepare a joint Tourism Investment Promotion Strategy for the IGAD Member States
		Promote opportunities for tourism investment in the region
PRIORITY AREA 5: TOURISM HUMAN RESOURCE DEVELOPMENT	Overall Strategic Objective: To guarantee that each IGAD Member State has adequate and qualified human resource at all levels of the tourism sector, including business operations and management, destination policy, development and management, as well as research and academia.	
	Sub-objective 1: Bridge the short-term HR needs for the tourism sector.	Formulate and implement a short-term HR Development Strategy for the tourism industry IGAD Region
		Promote intra-regional labour mobility to bridge the short-term HR deficit in the Member countries
		Establish intra-regional apprenticeship programme
	Sub-objective 2: Develop Sustainable supply of globally competitive human resource for the tourism sector in IGAD	Harmonize tourism training and certification amongst IGAD Member States
		Establish centres of excellence in tourism training across the region



PRIORITY AREA	STRATEGIC OBJECTIVES	STRATEGIC ACTIONS
PRIORITY AREA 6: INTRA-REGIONAL MOVEMENT OF PERSONS, GOODS AND SERVICES IN THE TOURISM SECTOR	To facilitate unhindered movement of persons, goods and services within the tourism sector within the IGAD region.	Adopt favourable visa regimes
		Review and align air transport policies with tourism development strategy
		Promote uptake of the IGAD Protocol of Free Movement of Persons
		Ensure safe passage across all trans frontier highways
		Promote intra-regional trade in goods and services required for the tourism sector across its value chain.
PRIORITY AREA 7: INFORMATION, KNOWLEDGE AND EXPERIENCE SHARING	To facilitate sharing of information, knowledge and experiences among IGAD Members States for tourism development	Establish an integrated tourism statistics system at regional level
		Establish a regional framework for sharing experiences in tourism development
PRIORITY AREA 8: FORMULATE A TOURISM DEVELOPMENT GUIDE	Strategic Objective: Provide the IGAD region with a tourism development framework to enable harmonized planning and development.	Develop a tourism development guide to enable harmonized planning and development of the sector.
PRIORITY AREA 9: TOURISM DEVELOPMENT FINANCING	Ensure sustainable financing of the IGAD STMP 2024-2034	Estimate the resource requirements for each STMP 2024-2034 Priority Programmes
		Map potential sources of financing for each priority areas
		Implement resource mobilization strategies

STMP IMPLEMENTATION AND MONITORING FRAMEWORK

The STMP 2024-2034 provides a 10-year implementation matrix divided into three phases, a monitoring and evaluation framework, and an institutional arrangement specifying the roles and responsibilities of various institutions involved in implementing this regional framework.

ESTIMATED BUDGET

The estimated cost of implementing the STMP is USD 97,100,000, which includes provisions for Monitoring and Evaluation. This amount is distributed as below

	PRIORITY AREA	EST. BUDGET ('000 USD)
1	Trans-Boundary Tourist Products	50,200
2	Regional Tourism Quality Standards	8,200
3	Tourism Promotion and Marketing	8,500
4	Promotion of Tourism Investment in The Region	8,100
5	Tourism Human Resource Development	10,000
6	Intra-Regional Movement of Persons, Goods and Services in the Tourism Sector	9,500
7	Information, Knowledge and Experience Sharing	700
8	Formulation of a Tourism Development Guide	100
9	Tourism Development Financing	1,500
10	Monitoring and Evaluation:	
	a) End of Mid Term Implementation (2)	200
	b) End Term Evaluation	100
	TOTAL	97'100



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LIST OF ACRONYMS AND ABBREVIATIONS

AfCFTA	African Continental Free Trade Area	NGO	Non-Governmental Organisation
AfDB	African Development Bank	NMR	Neonatal Mortality Rate
AIGF	Afghanistan Investment Guarantee Facility	NTOs	National Tourism Organisations
ASEAN	Association of Southeast Asian Nations	NTPBs	National Tourism Professional Boards
AU	African Union	OVis	Objectively Verifiable Indicators
AUC	African Union Commission	PAP	Priority Action Plan
AVOI	African Visa Openness Index	PIDA	Programme for Infrastructure Development in Africa
CCSTP	Common Competency Standards for Tourism Professionals	SAATM	Single African Air Transport Market
CEWARN	Conflict Early Warning and Response Mechanism	SADC	Southern Africa Development Community
COMESA	Common Market for Eastern and Southern Africa	SRO-EA	Sub-Regional Office for Eastern Africa
COVID	Corona Virus Disease	STMP	Sustainable Tourism Master Plan
DMO	Destination Management Organization	THRPMC	Tourism Human Resource Professional Monitoring Committee
DMS	Destination Management Systems	ToT	Training of Trainers
DRM	Domestic Resource Mobilization	TPSA	Tourism Private Sector Alliance
EAC	East African Community	TRM&EC	Tourism Resourcing, Monitoring and Evaluation Committee
ETA	Electronic Travel Authorization	TSA	Tourism Satellite Account
EU	European Union	TTCI	Travel and Tourism Competitiveness Index
FDI	Foreign Direct Investment	TVET	Technical and Vocational Education and Training
FTYIP	First Ten-Year Implementation Plan	UNECA	United Nations Economic Commission for Africa
GDP	Gross Domestic Product	UNESCO	United Nations Educational Scientific and Cultural Organisation
GHACOF	Greater Horn of Africa Climate Outlook Forum Climate Prediction	UNWTO	United Nations World Tourism Organisation
HIV	Human Immunodeficiency Virus	USD	United States Dollar
HR	Human Resource		
ICPAC	IGAD Climate Prediction and Applications Centre		
ICT	Information and Communication Technology		
IGAD	Inter-governmental Authority on Development		
ILO	The International Labour Organisation		
IPoA	Implementation Plan of Action		
KUC	Kenya Utalii College		
LAPSSET	Lamu Port-South Sudan-Ethiopia-Transport		
MICE	Meetings Incentives Conferences and Exhibitions		
NEPAD	New Partnership for Africa's Development		



01

Introduction

INTRODUCTION

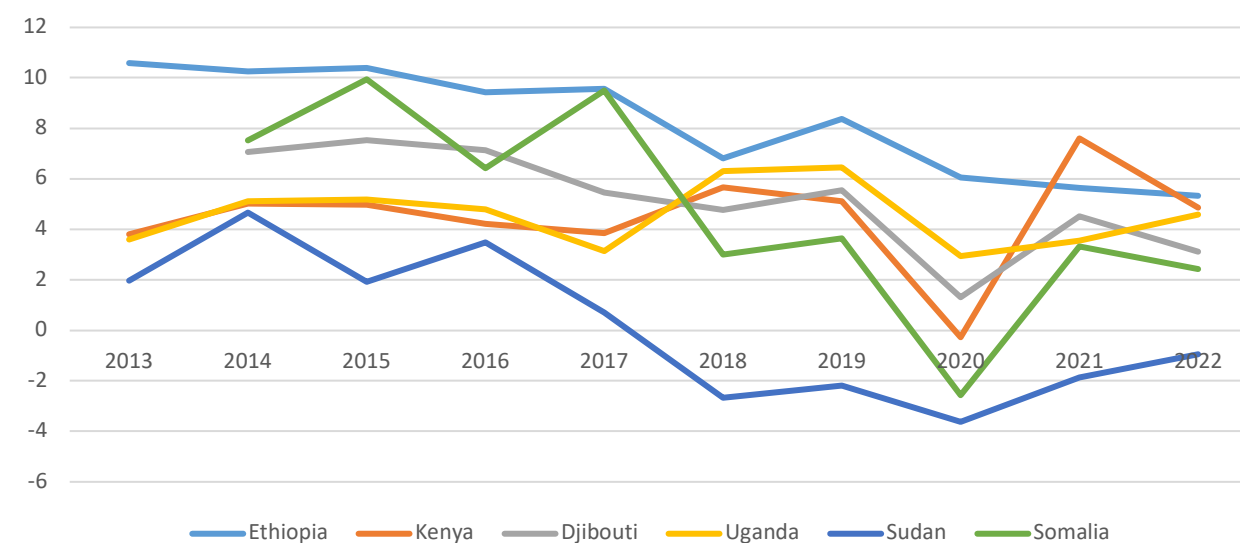
1.1 BACKGROUND

The Intergovernmental Authority on Development (IGAD) region comprises eight countries: Djibouti, Eritrea, Ethiopia, Kenya, Somalia, South Sudan, Sudan and Uganda.

The region is characterized by a diverse and dynamic economy encompassing a wide range of sectors, including agriculture, energy, trade, and tourism. As a regional economic community in the Eastern Africa region, IGAD Member States work together to promote sustainable economic growth, improve infrastructure, and foster cooperation in various economic activities. The region's economy is also influenced by factors such as natural resource endowments, economic policies, and regional integration efforts, all of which contribute to shaping the economic landscape of the IGAD countries.

As illustrated in the Figure 1.1 below, which depicts the economic performance of IGAD Member States from 2013 to 2022, the region demonstrates varying growth rates in real GDP among its Member States. Notably, while some countries experienced consistent growth over the years, others encountered periods of fluctuation and even negative growth. These fluctuations may be attributed to various factors such as political instability, economic policies, and external influences. It's evident that the economic landscape of the region is diverse and complex. The figure below shows a trend in economic growth for IGAD region 2013-2023.

FIGURE 1.1: IGAD Member States Economic Growth- % Rate of Change of Real GDP



Source: World Bank Database (2013-2023)

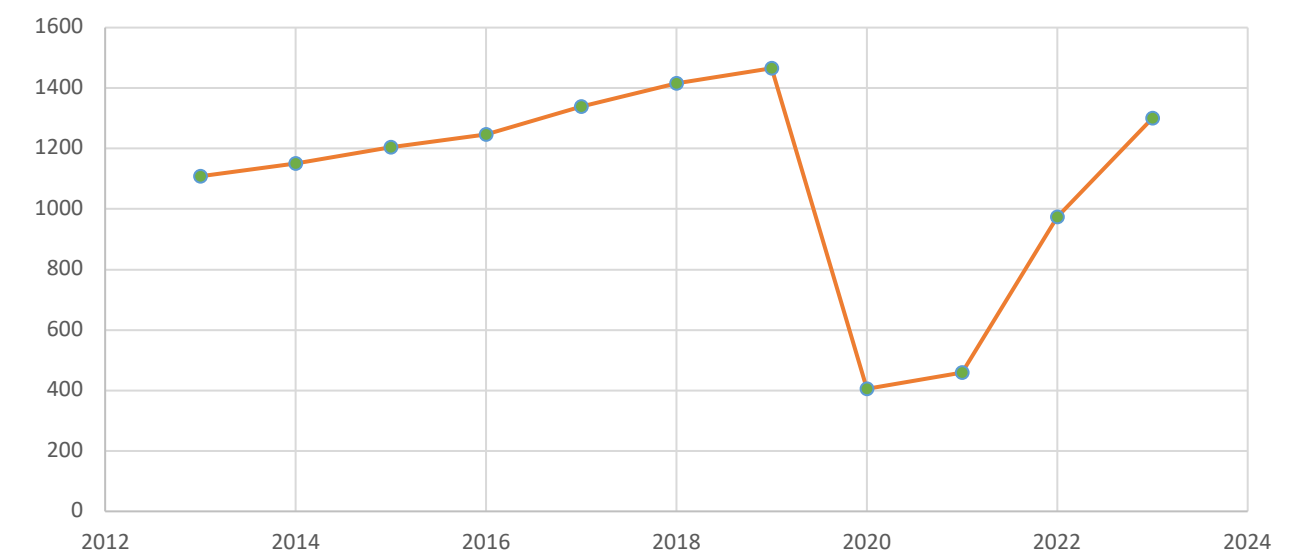
1.2 OVERVIEW OF TOURISM TRENDS IN THE IGAD REGION

1.2.1 Global overview

Despite occasional shocks, international tourism has demonstrated high levels of resilience, quickly rebounding after major global setbacks. For instance, prior to COVID-19, international tourism arrivals were on an upward trajectory, rising from 1108.58 million international tourist arrivals in 2013, steadily increasing annually to reach 1464.65 million arrivals in 2019. The industry however experienced a significant decline in 2020 with only 406.3 million arrivals, due to the impact of the global COVID-19 pandemic on international travel.

The figures started to recover in 2021, reaching 459.38 million arrivals, and then showed a dramatic increase in 2022 to 974.69 million, indicating a strong rebound in international tourism. This positive trend continued into 2023, with 1300.11 million arrivals.

FIGURE 1.2: Global International Tourist Arrivals (Millions)



Source: UNWTO database, 2012- 2024

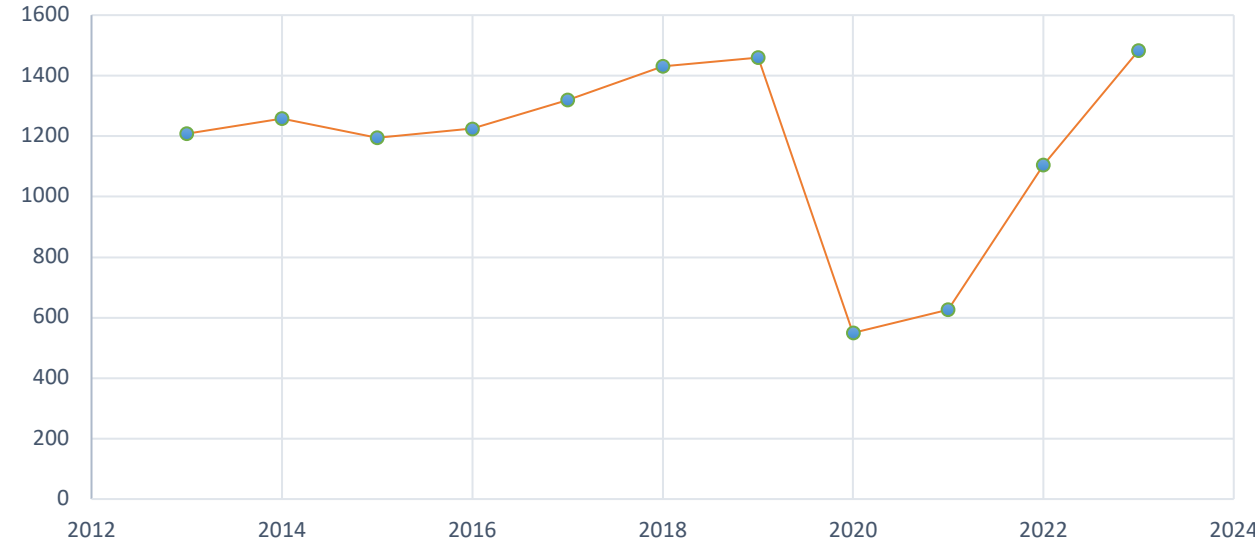
International Tourism Receipts

The international tourism receipts trend chart shows the revenue generated by international tourism globally from 2013 to 2019. However, there was a significant drop in 2020, with receipts dropping to USD 549.2 billion compared to USD 1.5 trillion in 2019, due to the impact of the COVID-19 pandemic on global travel. The



figures started to recover in 2021, reaching USD 626.9 billion, and continued to increase in the following years, reaching USD 1482.5 billion in 2023. This recovery suggests a positive trend in international tourism receipts following the challenges faced in 2020.

FIGURE 1.3: Global International Tourism Receipts 2012-2023 (USD Billions)

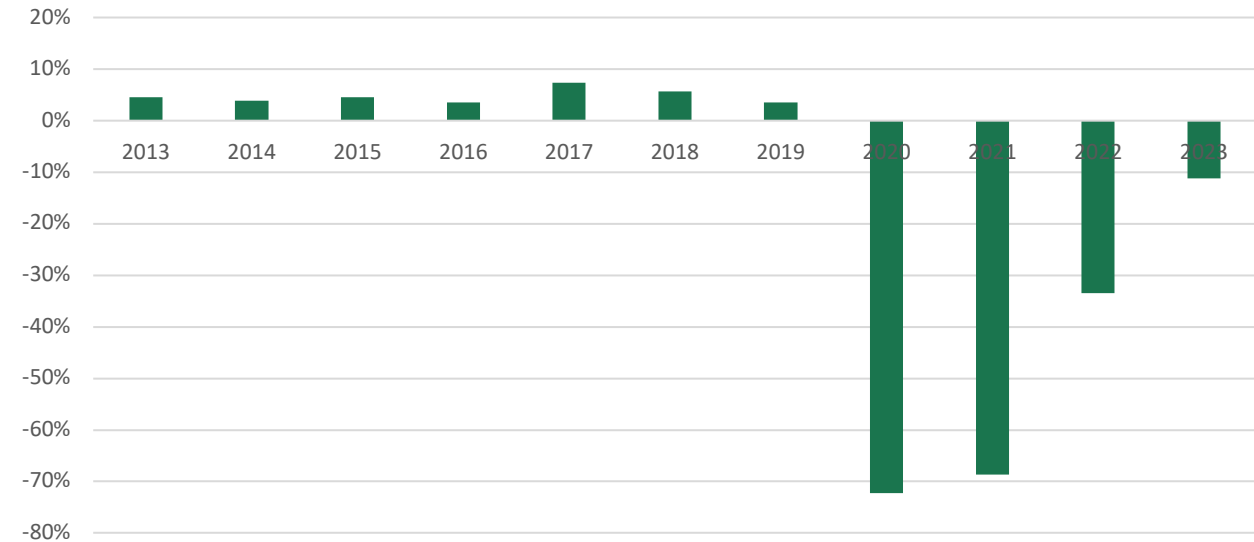


Source: UNWTO database, 2012- 2024

Global recovery of the tourism industry from COVID-19 impact

As indicated above, the global tourism industry experienced a significant downturn in 2020, with a sharp decline recording a percentage change of -72.30 per cent, compared to 2019. However, the trend chart below indicates signs of recovery as the industry begun to rebound significantly in 2022 and 2023, with percentage changes of -11.20 per cent from 2019. This suggests a gradual improvement in the global tourism sector, indicating a positive trajectory for the industry. The recovery highlights the resilience of tourism sector and the gradual overcoming of the unprecedented challenges posed by the pandemic. It also signifies renewed confidence among travellers in international tourism.

FIGURE 1.4: Global Tourism Recovery from COVID-19 (Change over 2019 percentage)



Source: UNWTO database, 2012-2024

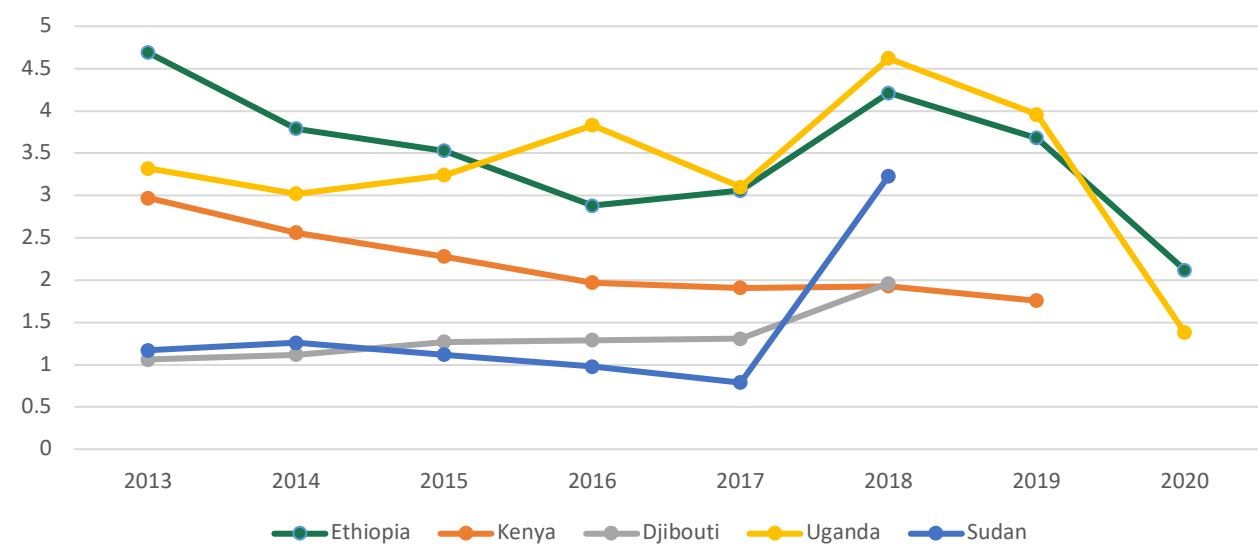
1.3. REGIONAL TOURISM TRENDS IN THE IGAD REGION

The IGAD region is rich with diverse tourism resources with each country offering unique tourism experiences, ranging from ancient archaeological sites and vibrant cultural festivals to diverse wildlife and stunning landscapes. The diverse offerings in the region make it a compelling destination for travellers seeking authentic cultural experiences, adventure, and natural beauty. As the region further develops its tourism infrastructure and promotes cross-border initiatives, it is poised to become an increasingly sought-after destination for global travellers.

With such resource base, the tourism industry has remained a key economic pillar for the majority of the Member States making a significant contribution to the GDP and employment generation as attested in the figure that shows the contribution of tourism to the GDP of different IGAD Member States from 2013-2020.



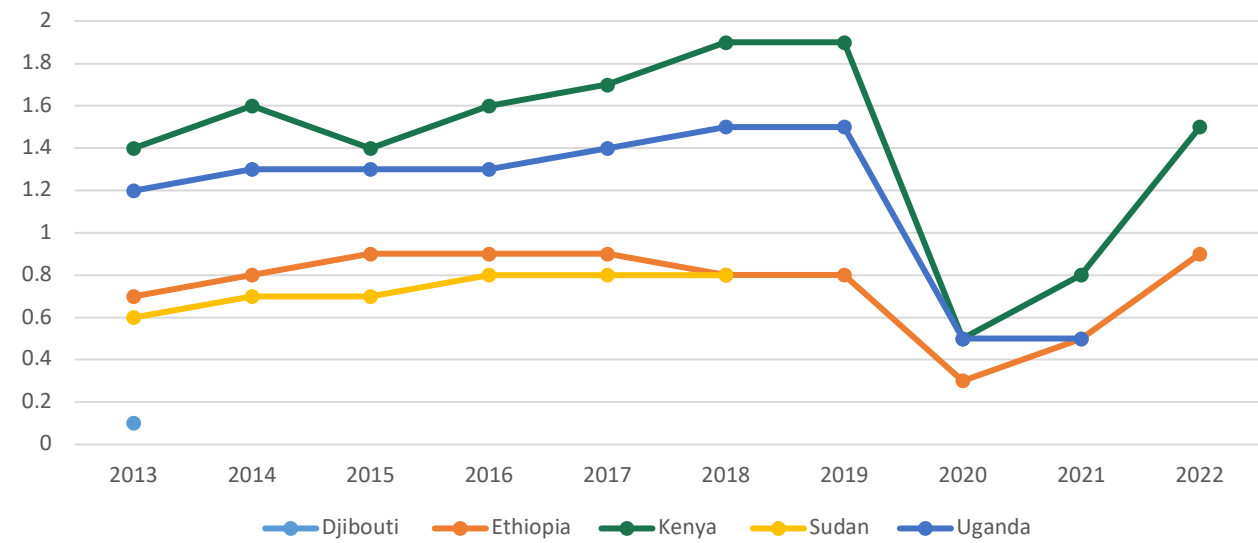
FIGURE 1.5: Contribution of Tourism to the GDP of IGAD Member States (Revenue % of GDP)



Source: World bank Database, 2013-2024

Nonetheless, the region has over the years recorded varying trends in international tourism arrivals for the Member States as can be seen in the figure below.

FIGURE 1.6: Tourism Arrivals Trends 2013-2022 ('000)

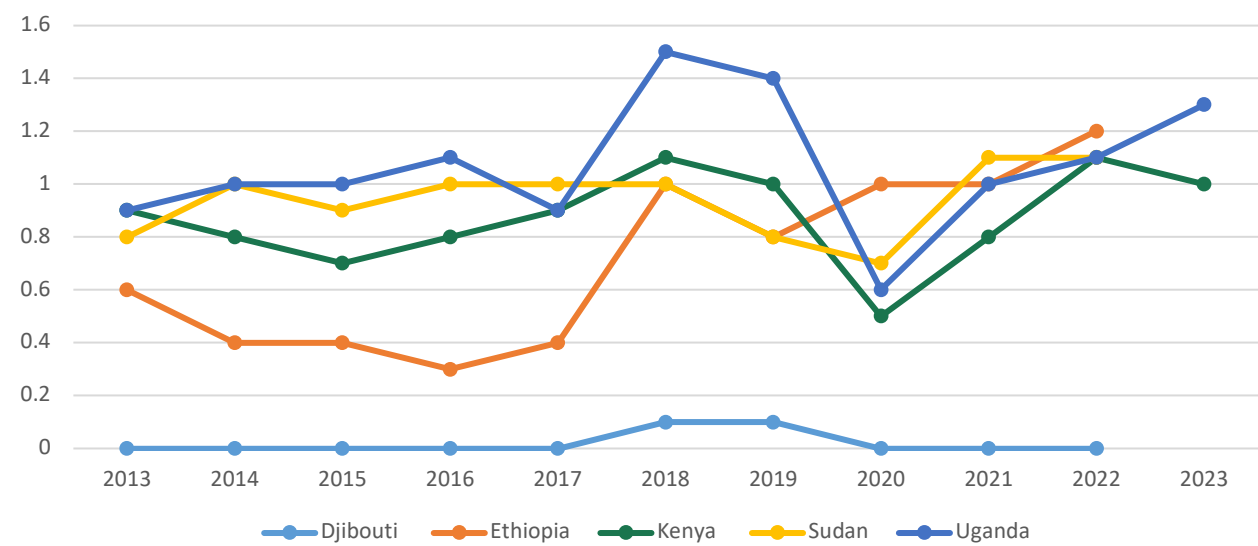


Source: UNWTO Database, 2013-2024

It is notable that Ethiopia and Kenya experienced consistent growth in international tourist arrivals from 2013 to 2019 while the numbers of Djibouti and Sudan have fluctuated over the years. There is a significant decline in 2020, which can be attributed to the impacts of COVID- 19 in the region. However, the region is undergoing recovery and notable increase in numbers from the 2020 can be seen.

In terms of tourism receipts, average annual international tourism receipts for IGAD Member States from 2013 to 2023 has fluctuated during this period. On a country-level, there was a notable increase in tourism receipts for Ethiopia, Uganda and Kenya between 2018-2018, and a massive drop in 2020 due to COVID-19. The region is however, gradually recovering with the tourism revenues increasing as the number of tourism arrivals increase.

FIGURE 1.7: International Tourism Receipts Trends for IGAD Countries 2013-2022 (USD Billion)



Source: World Bank Database, 2013-2024



02

IGAD Region
Tourism
Competitiveness
Diagnostics



2.1 INTRODUCTION

As noted, tourism continues to be a priority sector in virtually all the IGAD Member States. This fact notwithstanding, it is important to diagnose the state of competitiveness of the tourism sector within the region with a view to identifying areas of intervention. This diagnostic report is presented below.

2.1.1 Enabling Environment

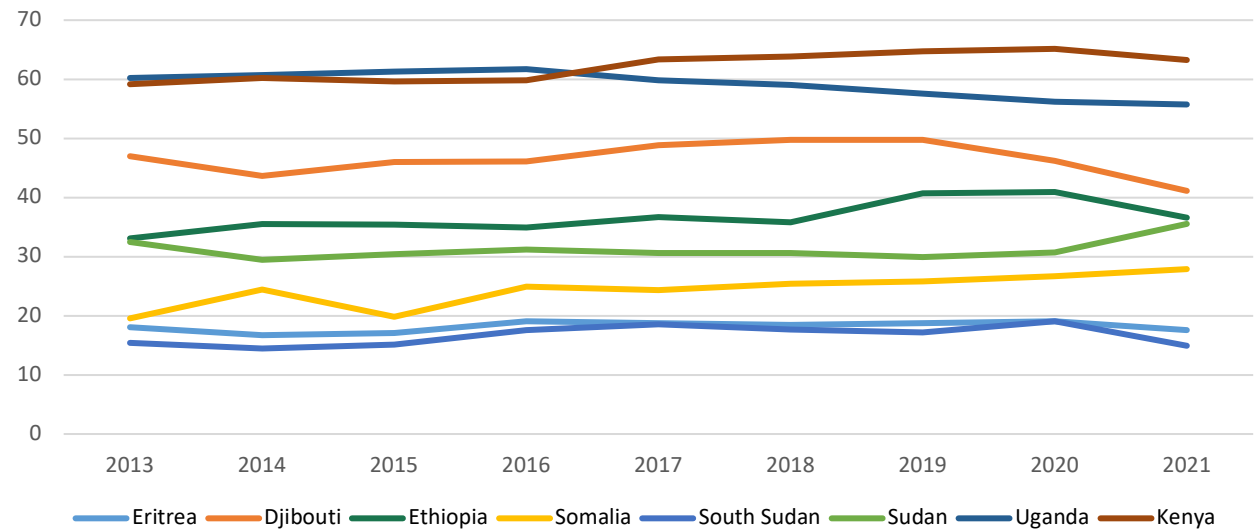
The enabling environment is a crucial factor in determining the competitiveness of the tourism industry in the IGAD region. This includes political stability, safety and security, and ease of doing business. Each country within the region has its unique enabling environment, and some have made significant progress in improving their business environment, such as Kenya. However, other countries, such as Somalia, are still facing political instability and security challenges. According to the African Development Bank, Kenya has made significant progress in improving political stability, safety and security, and the ease of doing business¹

The enabling environment for tourism development in the IGAD region varies widely. Countries like Uganda and Ethiopia benefit from relative political stability and peace, which positively affects tourism. Conversely, nations such as Somalia and South Sudan are still grappling with political instability and insecurity, which hinder tourism growth. This disparity underscores the need for countries in the region to work together to promote peace and security, fostering a favourable environment for tourism development. For instance, Ethiopia's significant strides in promoting peace and security in the region have contributed to the growth of its tourism sector.

2.1.2 Business Environment:

Business environment captures the extent to which a country's policy environment is conducive to commercial activities. According to the World Bank, an economy's ease of doing business score is measured on a scale from zero to 100, where zero represents the lowest performance and 100 represents the best. The figure below illustrates the ease of doing business for IGAD Member States. As of 2021, Kenya ranked top among IGAD Member States with a score of 63.2, followed by Uganda with a score of 55.7. Eritrea and South Sudan are ranked last, with scores of 17.6 and 14.9 respectively.²

FIGURE 2.1: IGAD Region Ease of Doing Business



Source: World Bank Database, 2013- 2024

2.1.3 Safety and Security

Safety and security are critical factors in determining the success of a country's travel and Tourism sector. More than any other economic activity, the success or failure of a tourist destination depends on its ability to provide a safe and secure environment for visitors. Governance based on the rule of law can significantly lower political risk, thereby enhancing stability, which is crucial for attracting investment.

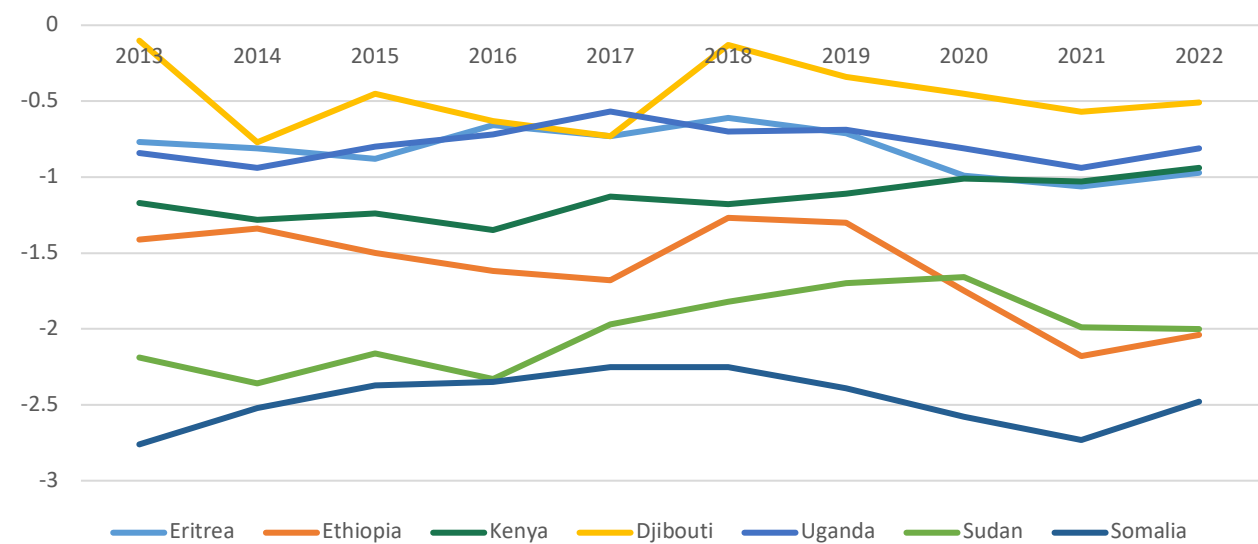
The IGAD region is generally regarded as highly volatile and risky in terms of safety and security. As presented in the Figure 2.2 below, the Political Stability Index, countries like Sudan and Somalia have experienced significant political instability and social unrest in recent years, leading to a low political risk score. On the other hand, Djibouti has maintained a relatively stable government and a strong rule of law, leading to a higher political risk score. However, it is important to note that the overall stability of IGAD Member States improved as of 2022.

¹ African Development Bank. (2019). Kenya Economic Outlook

² https://prosperitydata360.worldbank.org/en/indicator/QOG+BD+iiag_be



FIGURE 2.2: Political Stability Index of IGAD Countries



Source: World Bank³

2.1.4 Health and Hygiene

Healthcare infrastructure, accessibility and health security plays a key role in the success of the tourism industry boosting the traveller’s confidence in a destination. COVID-19 demonstrated how important a country’s healthcare system is when it comes to mitigating the impact of pandemics and ensuring safe travel conditions, and workforce availability and resilience. Generally, if tourists or sector employees do become ill, the country’s health sector must be able to ensure that they are properly cared for, as measured by the availability of and access to physicians, hospital beds and general healthcare services. Moreover, access to safe drinking water and sanitation is important for the comfort and health of travellers and locals alike.

Most IGAD Member States are low-middle-income countries with low health service coverage, and high mortality and morbidity rates. The health burden within the IGAD region disproportionately manifests across the countries. For instance, South Sudan, recorded the region’s highest neonatal mortality rate (NMR) of 40 in 2020 and the highest HIV incidence of 1.37 in 2020. Somalia ranked second in NMR and TB incidence, recording 37 per 1,000 live births and 259 per 100,000 populations, respectively.

3 <https://databank.worldbank.org/source/worldwide-governance-indicators/Series/PV.EST>

TABLE 2.1: IGAD Health Indicators

Country	Neonatal mortality rate, 2020 (Per 1,000 live births)	Incidence of HIV per 1,000 uninfected adults, 2020	Tuberculosis incidence per 100,000 population, 2020	Universal Health Coverage Index, 2019 (0-100)	Share of children who have had two doses of the measles vaccine (MCV2), 2021 ⁵⁷
Djibouti	30	0.13	224	48	48
Eritrea	18	0.07	81	50	85
Ethiopia	27	0.12	132	38	46
Kenya	20	0.72	259	56	57
Somalia	37	0.02	259	27	-
South Sudan	40	1.37	232	32	-
Sudan	27	0.09	63	44	63
Uganda	19	0.95	196	50	-

Source: IGAD Annual Report, 2022

2.1.5 Human Resources and Labour Market

High-quality human resources in an economy ensure that the sector has access to the collaborators it needs. The prevailing literacy rates and by extension, numeracy skills are critical to the formation of human capital in any given industry or economy. In this regard, though changing, the persistently low literacy and numeracy rates in the IGAD region can be regarded as a major obstacle for tourism development as the success of the industry is heavily dependent upon the availability of relevant skills and knowledge. Human resources is an important factor that affect the competitiveness of the tourism industry.

Unfortunately, the IGAD region still faces significant challenges in this regard, with many countries lacking the necessary skills and training programmes to develop a competent and professional workforce. Addressing this challenge requires a coordinated effort between governments, the private sector, and educational institutions. Nonetheless, individual countries have initiated measures to address this challenge. For example, Ethiopia has a large and growing tourism industry, but it faces challenges in terms of skilled labour and workforce development. To address these challenges, the Ethiopian government has launched various initiatives to develop the skills of the tourism workforce, including training programmes and vocational education.⁴

4 Ethiopian Tourism Organization (2021).



Similarly, South Sudan has a nascent tourism industry, and it faces challenges in terms of developing a skilled workforce. To address these challenges, the government has launched various initiatives to promote education and vocational training⁵. It is informative to note that the IGAD region has had an aspiration of a coordinated regional action plan to address the human resource deficiency for the tourism sector as espoused in the STMP 2013-2023.

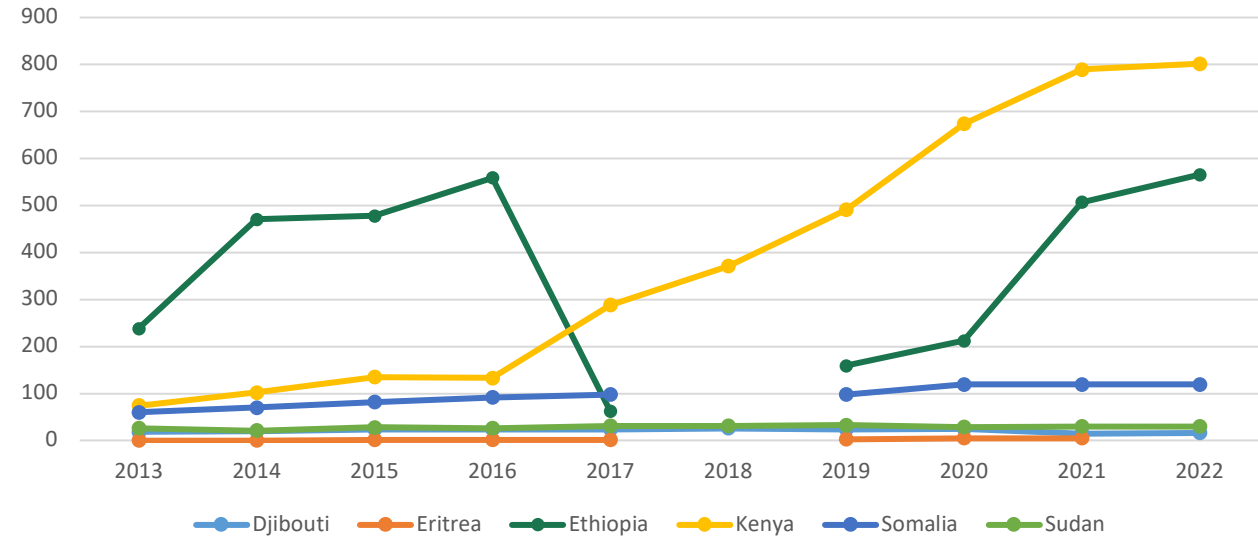
2.1.6 ICT Readiness

The significance of ICT in the tourism industry cannot be overstated given the increasing importance of the online environment for the distribution and promotion of the travel and tourism products. ICT infrastructure encompasses penetration rates through the internet, telephone lines and broadband, which provide a sense of the society's online activity. It also includes a specific measure of the extent to which the internet is used by businesses in carrying out transactions in the economy.

Access to good technology not only raises tourism competitiveness by increasing attractiveness of the destination as a comfortable destination to high-end tourists but also raises the attractiveness of the destination as an investment location for tourism investors whose capital finances supply expansion in the tourism sector.

Figure 2.3 shows the number of broadband internet subscribers, in thousands, for various countries in East Africa from 2013 to 2022. Over the years, Ethiopia and Kenya have consistently shown steady growth in broadband internet subscribers, with both countries experiencing significant increases from 2013 to 2022. Ethiopia's subscriber count grew from 238 thousand in 2013 to 566 thousand in 2022, while Kenya's count grew from 74 thousand to 801 thousand during the same period. Other countries, such as Djibouti, Eritrea, Somalia, and Sudan, also witnessed varying degrees of growth in their subscriber numbers, despite fluctuations in some years.

FIGURE 2.3: Broadband Internet Subscribers ('000)



Source: International Telecommunication Union

2.2. PRIORITIZATION OF TRAVEL AND TOURISM

Prioritization involves the development of policies and strategies that focus on tourism as a key driver of economic growth. Within the IGAD region, there is a growing recognition of tourism as a significant driver of economic growth and development. While each member state has its own priorities, there is an increasing trend towards regional cooperation to promote tourism. Key priorities include improving infrastructure – such as roads, airports, and railways – to enhance connectivity, collaborative marketing efforts to promote the region as a tourist destination, and streamlining visa procedures and regulations.

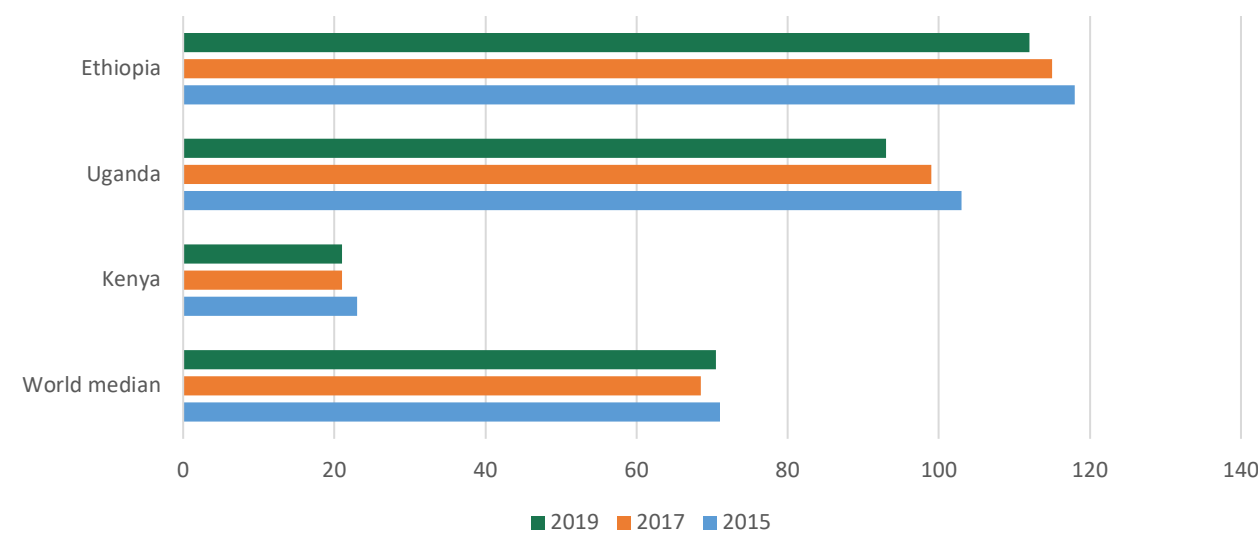
Other priorities include diversifying tourism products, investing in human capital through training programmes, engaging local communities in tourism development, and promoting sustainable tourism practices. In Ethiopia for instance, the country's ten-year Tourism Master Plan (2015-2025) demonstrates the government prioritization of the tourism sector, focusing on the development of new tourist destinations, improving the quality of tourism services, and creating a favourable investment climate for the private sector to invest in the tourism industry.

Figure 2.4 below indicates the IGAD Member States ranking based on the prioritization for tourism compared to the World Median between 2015 and 2019. Kenya consistently ranked highest, ranking at 21st position in 2019 followed by Uganda at 93rd position and Ethiopia came third at 112th position. Kenya, Uganda and Ethiopia have demonstrated a steady improvement in prioritizing tourism.

⁵ South Sudan Ministry of Tourism, Wildlife and Antiquities (2021).



FIGURE 2.4: Prioritization of Tourism for IGAD Member States (Compared against World median)



Source: World Economic Forum

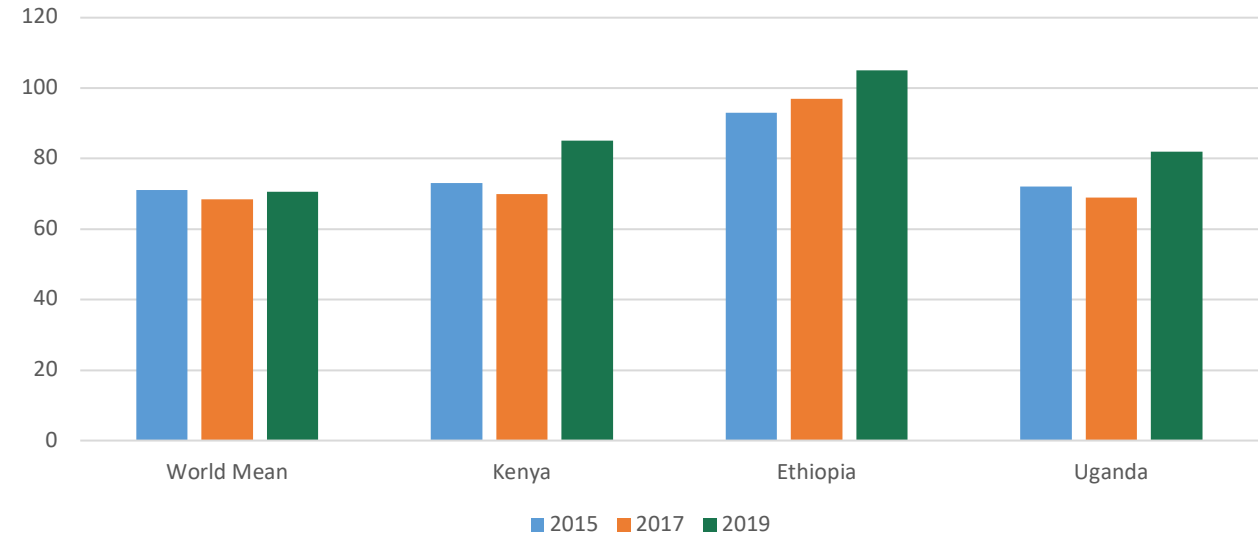
Through these efforts, IGAD Member States aim to leverage tourism for economic growth, job creation, poverty reduction, and regional integration.

2.2.1 International openness

Developing the tourism sector internationally requires a certain degree of openness and travel facilitation. International openness involves factors such as the number of bilateral air service agreements a government has entered into, which affects the availability of air connections to the country; and the number of regional trade agreements in force, which indicates the extent to which it is possible to provide world-class tourism services.

Figure 2.5 below shows the ranking of IGAD Member States against the World Median for international openness as provided by World Economic Forum Tourism and Travel Competitive Index 2015-2019. Uganda was ranked 82nd position in 2019, Kenya 85th position and Ethiopia ranked third among the IGAD Member States at 105th position.

FIGURE 2.5: IGAD Member States International Openness ranking



Source: World Economic Forum

Other parameters used to assess the level of International Openness for IGAD Member States include financial openness, bilateral air agreements, and Visa openness Index.

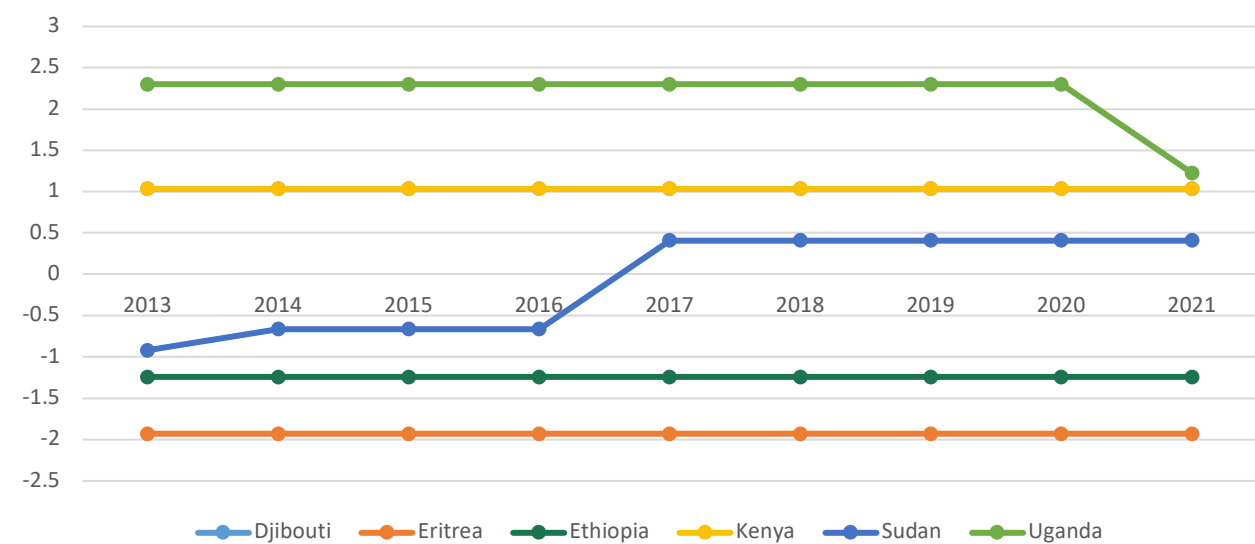
a) Financial Openness

Financial openness, measured as the free flow of capital, is important for cross-border trade and investment in travel and tourism services. The index measures the degree of openness of a country's financial sector to international trade and investment. Positive values indicate a high degree of financial openness, while negative values suggest a more closed financial sector.

As observed, Uganda and Kenya have consistently posted positive scores since 2013, indicating a relatively high level of financial openness. On the other hand, Eritrea and Ethiopia have consistently reported negative scores, suggesting a more closed financial sector.



FIGURE 2.6: Financial Openness trend for IGAD Member States (Index points)



Source: Chinn-Ito Index⁶

b) Bilateral air service agreements

Key to promoting the tourism industry is international air service openness. Bilateral air service agreements define the level and extent of collaboration between countries - in terms of routes airlines can operate, the cities that can be served within, between and beyond the bilateral partners, the number of flights that can be operated or passengers that can be carried between the bilateral partners, the number of airlines the bilateral partners can nominate to operate services and the ownership criteria airlines must meet to be designated under the bilateral agreement. In this regard, the IGAD region remains relative non-competitive despite of existence in majority of Member States of tourism policies, plans and strategies that would essentially entail integration of international air travel facilitation. The data below shows the number of Bilateral Air Service Agreement (BASAs) among IGAD Member States as of July 2024.

TABLE 2.2: IGAD Member States BASAs (2024)

RANK	MEMBER STATE	NO. OF BASAS
	Kenya	31
	Ethiopia	22
	Uganda	14
	Sudan	14
	Somalia	4
	Djibouti	4
	South Sudan	2
	Eritrea	0

Source: ICAO World Air Services Agreements

Further, out of the 34⁷ African countries that have signed the Single African Air Transport Market (SAATM), only two IGAD Member States have done so, i.e. Kenya and Ethiopia. It is informative to note that SAATM is aimed towards creating a single unified air transport market in Africa, liberalize civil aviation and drive the continent's economic integration agenda, and by extension, boosting intra-Africa trade and tourism as a result.

c) Visa Openness Index

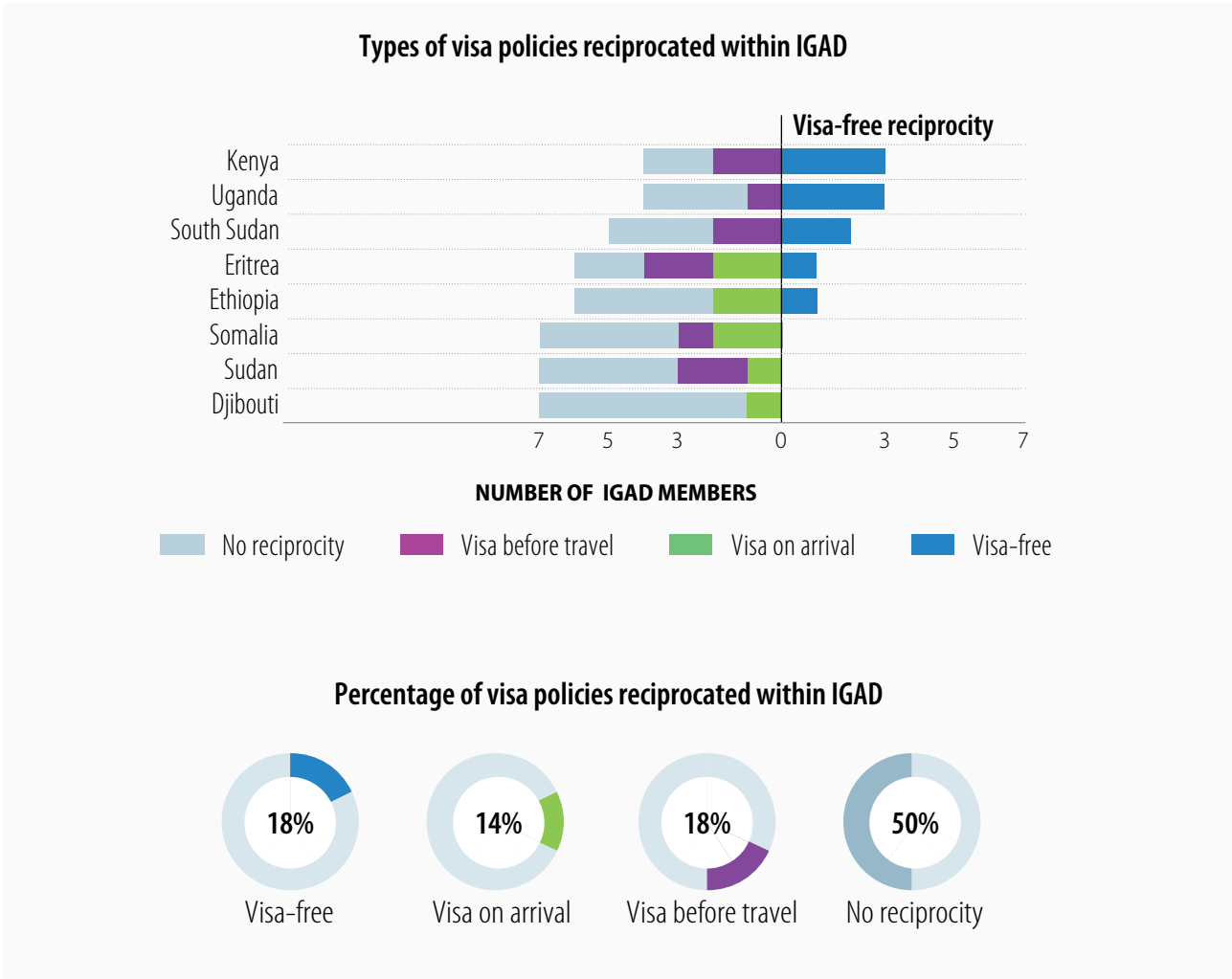
The IGAD region continues to be one of the least open regions in Africa. As per the African Visa Openness Index (AVOI), the region ranked sixth out of the eight Regional Economic Communities in 2023. According to AVOI's score rankings, Djibouti, Somali and Ethiopia were ranked among the top 20 in the Average ranking. Kenya, Uganda, South Sudan, Eritrea and Sudan were ranked below the IGAD average of 0.411 in terms of their Visa Openness performance.

⁶ The Chinn-Ito index (KAOPEN) is an index measuring a country's degree of capital account openness (<https://knoema.com/NBERCIFOI2017/the-chinn-ito-financial-openness-index>)

⁷ Source: IATA Data



FIGURE 2.7: IGAD Visa openness Index

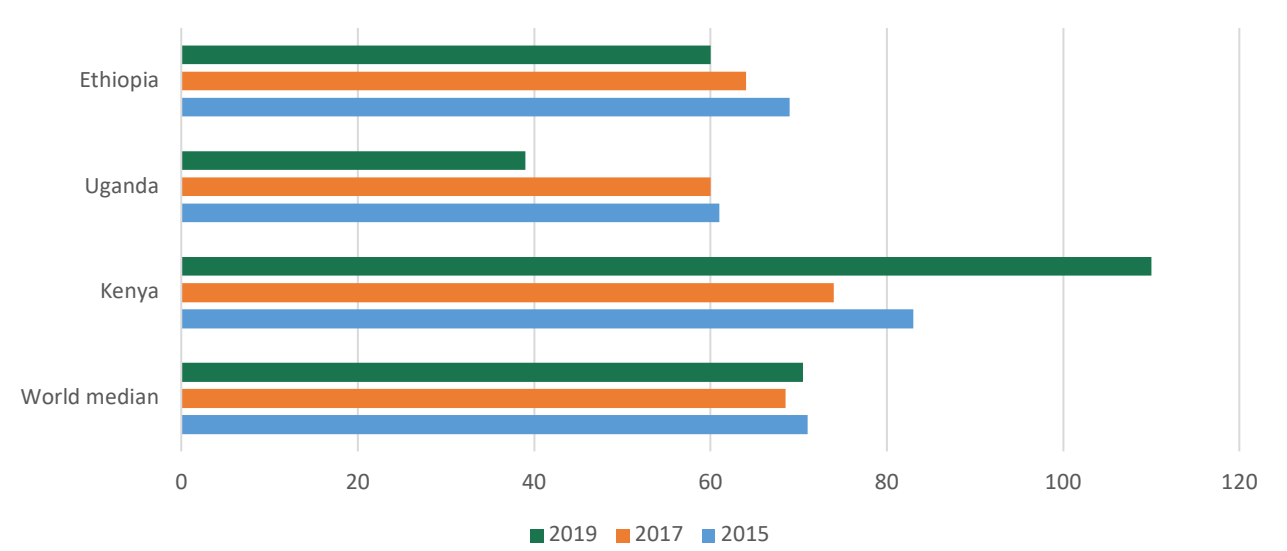


Source: African Development Bank Group (2023)

2.2.2 Price competitiveness

Price competitiveness demonstrates how costly it is to travel or invest in a country. Lower costs related to travel in a country increase its attractiveness for many travellers as well as making its tourism sector more appealing to investors. Price competitiveness ideally denotes a country's ability to offer competitive prices for tourism services. When price competitiveness ranking is compared against World median, Uganda was ranked first among the IGAD Member States in 2019 at 39th position an improvement from 60th position in 2017. In the same year 2019, Ethiopia ranked 60th position and Kenya came third at 110th position. This means that among the IGAD member systems Uganda has the highest price competitiveness for tourism followed by Ethiopia.

FIGURE 2.8: Price Competitiveness in the IGAD Region



Source: World Economic Forum Database

2.3 INFRASTRUCTURE

The infrastructure in the IGAD region is a crucial factor in determining the competitiveness of the tourism industry. Over the years, a number of Member States have made significant steps in improving the quality of infrastructure. For example, Djibouti has made significant progress in improving its infrastructure, including the construction of a new airport and seaport. It is important to note that IGAD Member States stand to benefit from the Programme for Infrastructure Development in Africa (PIDA), a strategic continental initiative aimed at addressing the infrastructure deficit in Africa focuses on regional infrastructure development to promote socio-economic development and integration across the continent.

In the IGAD region, the implementation of PIDA has involved the coordination of efforts to develop key infrastructure such as transport networks, energy, water, and ICT. This aims to improve connectivity and boost trade and economic growth within the IGAD Member States. The approval of construction of the LAPSSET railway for Ethiopia, Kenya and South Sudan, among other ongoing infrastructure projects, such as construction of roads, Fibre Optic cables and upgrading of border posts in IGAD Member States, are some of the ways the region is benefiting from the PIDA programme.



2.3.1 Air Transport Infrastructure

Air connectivity is essential for travellers’ ease of access to and from countries, as well as movement within many countries. In this pillar, we measure international and domestic air route capacity and quality, using indicators such as available seat kilometres, the number of operating airlines and the efficiency of air transport services. The extent to which a country’s airports are integrated into the global air transport network is also measured.

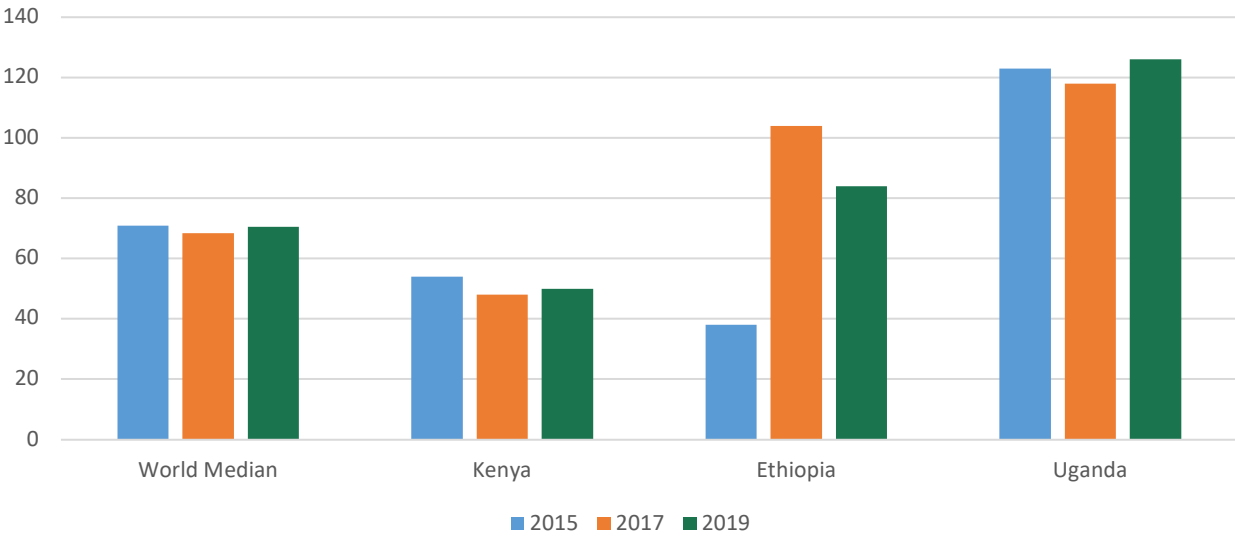
According to UNWTO, over 960 million tourists travelled internationally in 2022, more than doubled in 2021. IATA reported that airlines carried 3.4 billion passengers in 2022 compared to the 2.2 billion realized in 2021. Africa received 46.6 million international tourists, generating USD 31.6 billion. Airlines in the continent carried 67 million passengers, representing a 55.8 per cent growth compared to the previous year. In terms of capacity, the average Passenger Load Factor recorded in Africa for 2022 was 71.6 per cent, a 10.6 per cent increase compared to 2021. This is 7 per cent less than the global average.

The quality of air transport infrastructure is gauged based on several factors: the quantity of air transport, indicated by the available seat kilometres for both international and domestic flights, the number of departures, airport density, the number of operating airlines, the quality of the air transport infrastructure both for domestic and international flights and international air transport network. The majority of tourists visit the IGAD region by air, and therefore, air transport infrastructure is crucial for the development of the tourism industry.

Ethiopia and Kenya have made significant investments in their air transport infrastructure, with modern airports and expanding fleets of commercial airlines. Ethiopia has invested heavily in its air transport infrastructure, with a state-of-the-art airport in Addis Ababa and a growing fleet of Ethiopian Airlines planes. This has helped to facilitate trade and tourism within the region and beyond.

According the World Economic Forum ranking against the World Median, Kenya ranked 50th in 2019 in terms of the quality of air transport infrastructure as shown in the figure below. Ethiopia ranked 84th position while Uganda ranked 126th in 2019⁸.

FIGURE 2.9: Ranking for Air Transport Infrastructure Quality in IGAD Member States



Source: World Economic Forum

2.3.2 Road Infrastructure

Ground transport plays an important role in the tourism system of any given destination, complementing air transport by providing access to the various tourist activities and attractions. Road transport constitutes the most commonly utilised mode of ground transport in terms of facilitating access to and from destinations. Consequently, the quality of road transport and road density (measured in kilometres of road per 100 square kilometres of land) are key factors in destination competitiveness.

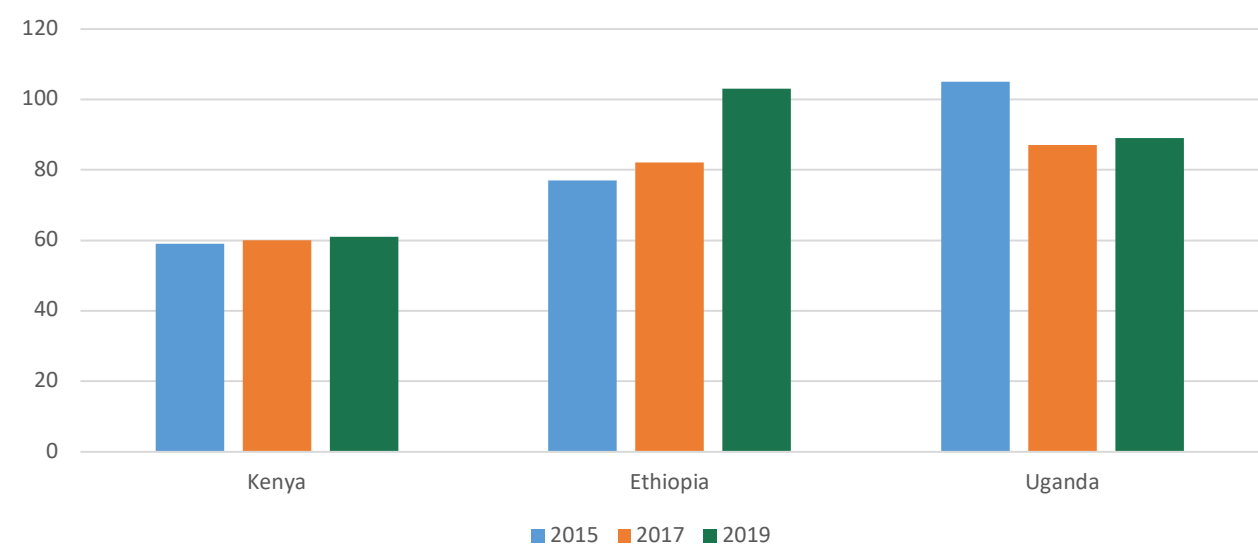
The figure below shows the ranking of IGAD Member States for the quality of Road transport infrastructure, based on the WEF 2023 data for the Tourism and Travel Competitiveness Index. The values are compared against the World Median. As of 2019, Kenya was ranked 61st position, Uganda 89th and Ethiopia 103rd.⁹

⁸ <https://prosperitydata360.worldbank.org/en/indicator/WEF+TTCI+EOSQ061>

⁹ <https://prosperitydata360.worldbank.org/en/dataset/WEF+TTCI>



FIGURE 2.10: Quality of Road Infrastructure for IGAD Member States



Source: World Economic Forum

The prevailing road conditions, densities and networks within IGAD Member States and the region as a whole are generally poor and inadequate, with better conditions confined to urban areas, mostly the capital cities. In terms cross-border road network, while there are roads connecting the Member States – such as the route from Djibouti to Assab in Eritrea and onward to Dikhil for access to Ethiopia, or part of the Trans-East African Highway linking Nairobi and Addis Ababa via Moyale – the condition of these roads is mostly substandard. Travel often requires the use of rugged vehicles.

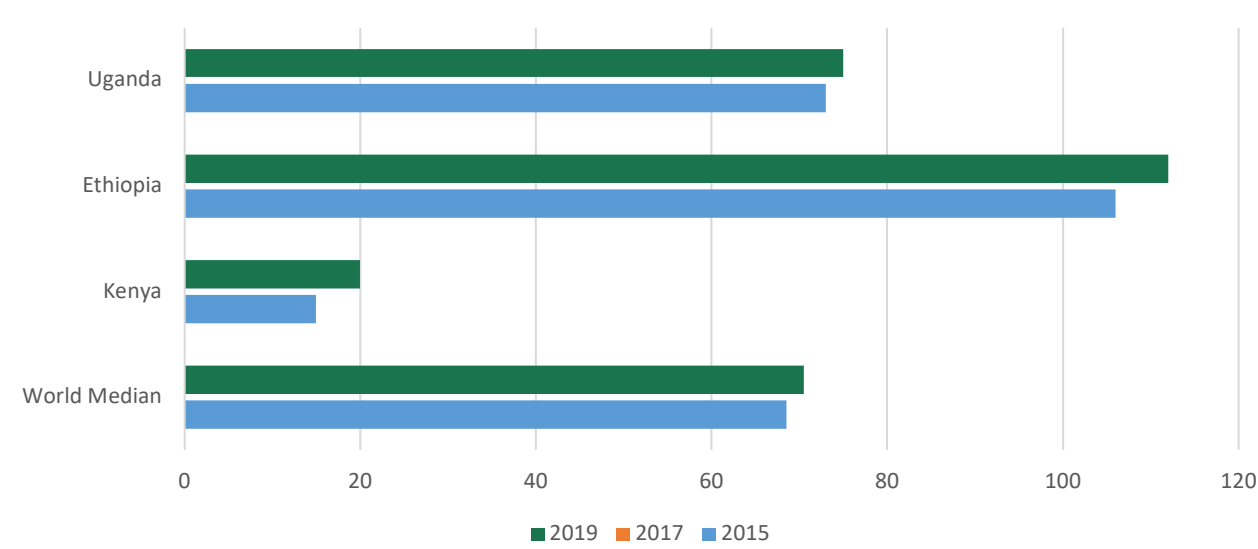
2.3.3 Tourist Service Infrastructure

The availability of sufficient accommodation, resort and leisure facilities can provide a significant advantage for IGAD tourism economy. The success of any tourism destination is dependent, to a large degree, on the quality of the facilities and services infrastructure available to the tourists. These can be categorized into

- Primary tourist facilities and services: Accommodation (hotels), restaurants, and travel and tour services.
- Secondary tourist facilities and services: Shopping, recreation, entertainment and visitor information services.
- Tertiary tourist facilities and services: Health services and care, emergency and safety services, financial services and personal services.

As shown in the figure 2.11, Tourism and Travel Competitiveness Index (TTCI) ranked Kenya 20th in terms of quality of tourism infrastructure in 2019, compared to the World Median. In the same year, Uganda was ranked 75th and Ethiopia 112th.

FIGURE 2.11: IGAD Member States Ranking for Quality of Tourism Infrastructure



Source: World Economic Forum

The tourism business environment in the IGAD region is expected to experience significant growth in the coming years, as evidenced by the hotel pipeline report for 2024. The report indicates that several new hotels and resorts are set to open in the region, which is expected to boost the tourism sector even further. One of the key drivers of this growth is the increasing interest in the region by international investors, who are attracted by the area's natural beauty, diverse cultural offerings, and growing infrastructure.

According to the Hotel Chain Development Pipeline report 2024 by the W Hospitality Group, East Africa, that hosts six of the IGAD Member States, ranks second in pipeline rooms, after West Africa, accounting 28 per cent of the total. In the overall ranking, Ethiopia is positioned fourth, while Kenya is ranked seventh. IGAD countries featured in the pipeline include Djibouti, Ethiopia, Kenya, South Sudan, Sudan and Uganda leaving out Eritrea and Somali as per Hotel Pipeline Report, 2024¹⁰.

¹⁰ W-Hospitality Hotel Pipeline Report 2024.



TABLE 2.12: Hotel Chain Development Pipelines in Africa 2024 Countries with Hotel Chain Pipeline Deals

NORTH AFRICA	SOUTHERN AND INDIAN OCEAN	WEST AFRICA	EAST AFRICA	CENTRAL AFRICA
Algeria	Angola	Benin Congo	Djibouti	Cameroon
Egypt	Botswana	Burkina Faso	Ethiopia	Chad
Morocco	Madagascar	Cape Verde	Kenya	Congo
Tunisia	Malawi	Cote d'Ivoire	Rwanda	Democratic Republic of Congo
	Mauritius	Ghana	South Sudan	Gabon
	Malawi	Guinea	Tanzania	
	Mozambique	Liberia	Uganda	
	Namibia	Mauritania		
	Seychelles	Niger		
	South Africa	Nigeria		
	Zambia	Senegal		
	Zimbabwe	Sierra Leone		
		The Gambia		
		Togo		

Source: W Hospitality Group, 2024

In conclusion, the IGAD region has made progress in improving its infrastructure, particularly in air transport, ground and port infrastructure, and tourist service facilities. However, there remains room for improvement in these areas. Overall, the IGAD region has the potential to become a major tourism destination in the world, but it will require continued efforts to improve infrastructure and address the challenges facing the industry.

2.4 TRAVEL AND TOURISM DEMAND DRIVERS

Travel and tourism demand drivers in the IGAD region are diverse, with wildlife, historical sites, and beaches being the major attractions. However, to attract a broader range of tourists, countries in the region need to diversify their tourism products and services.

2.4.1 Natural resources and Cultural Resources

The natural resources are evaluated based on the landscape, natural parks, and the diversity of wildlife. Countries possessing rich natural resources are more likely to



attract tourists. The IGAD region is rich in natural and cultural tourism resources that make it an attractive destination for travellers from all over the world. These resources include diverse landscapes, wildlife, cultural heritage sites, and traditional practices. In terms of natural tourism resources, the IGAD region is home to a vast range of landscapes, from deserts and savannahs to mountain ranges and tropical forests. The region is also home to a variety of wildlife, including elephants, lions, giraffes, and many species of birds. These natural resources attract visitors who are interested in experiencing the natural beauty of the region.

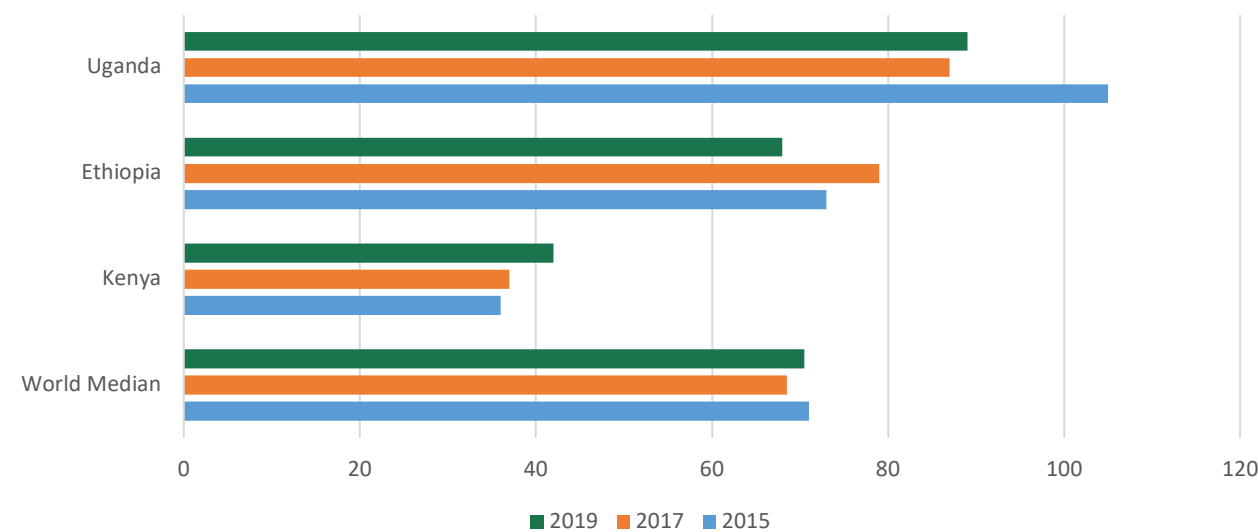
In addition to natural tourism resources, the IGAD region has a rich cultural heritage that is also a significant draw for visitors. The region is home to a diverse range of cultures, including the Maasai, Samburu, and Turkana in Kenya, the Oromo and Amhara in Ethiopia, and the Dinka and Nuer in South Sudan. These cultures have unique traditions, including music, dance, and storytelling, which provide visitors with a glimpse into the region’s rich cultural heritage.

There are also numerous cultural heritage sites in the region that attract visitors interested in history and archaeology. These sites include ancient ruins, such as the Aksumite Kingdom in Ethiopia, the archaeological sites of the Meroe Kingdom in Sudan, and the Lalibela Rock-Hewn Churches in Ethiopia. These sites provide visitors with an opportunity to learn about the region’s rich history and cultural heritage.

The figure below shows the ranking of IGAD Member States on the basis of their natural and cultural resources compared against the World Median. As of 2019, Kenya was ranked first among IGAD Member States at 42nd position globally followed by Ethiopia at 68th position while Uganda ranked 89th position.



FIGURE 2.13: IGAD Member States cultural and Natural Resources ranking



Source: World Economic Forum

Tourism authorities in the IGAD region are working to promote these natural and cultural tourism resources to attract more visitors and boost economic growth. This includes developing infrastructure to support tourism, such as airports, roads, and hotels, as well as promoting sustainable tourism practices to protect the environment and local communities. IGAD natural and Cultural resources provide opportunities for visitors to experience the region’s natural beauty, cultural heritage, and traditional practices. As efforts continue to promote responsible tourism practices, the region is poised to become a significant player in the global tourism industry

2.4.2 Non-Leisure Resources

Non-leisure Resources Index focus on measuring the extent and attractiveness of factors that drive business and non-leisure travel. One of the key factors in driving business travel is the presence of major multinational corporations. These companies often have a significant travel budget and require their employees to travel frequently for business purposes. Additionally, cities that are highly integrated into the global economy are also important indicators of potential business travel. These cities often have strong transportation links and a developed infrastructure that can support business needs. Another important factor in driving non-leisure travel is academic travel. The number and quality of universities in a country can play a significant role in attracting academic travel.

Countries with strong academic institutions and research facilities are often able to attract academic conferences, seminars, and other events. This can also have a positive impact on the local economy, as attendees often stay in hotels and eat at local restaurants during their visit. Finally, online searches related to business, academic and medical travel could provide a useful insight into the global interest in a country’s non-leisure resources.

2.5 TRAVEL AND TOURISM SUSTAINABILITY

Travel and tourism sustainability is a critical aspect of tourism development in the IGAD region. The region is vulnerable to climate change thus underscoring the need for countries to adopt sustainable tourism practices that mitigate the impact of tourism on the environment (WEF, 2022). This includes promoting eco-tourism, conservation of wildlife and natural resources, and minimizing carbon emissions from tourism activities. The following sections analyse the state of travel and tourism sustainability.

2.5.1 Environmental Sustainability

The sustainability of an economy’s natural environment, protection of its natural resources, and readiness for climate change is vital. Environmental sustainability policies and factors play a vital role in ensuring a country’s future attractiveness as a destination, as an attractive location for tourism relies heavily on the natural environment. The status of a country’s environment can be determined by analysing factors such as water stress, marine and air pollution, loss of forest cover, and the degree of extinction risk for species.

“To improve the governance of natural resources, there must be deliberate efforts to safeguard biodiversity and ensure that resource extraction is done sustainably and equitably, inclusive of communities, indigenous people, and human rights, especially in ecologically sensitive areas where threats to biodiversity and habitat destruction are very high.”

— Africa Development Bank Group, 2023

2.5.2 Socio-economic Resilience and Conditions

Social economic resilience and conditions are important factors that can have a significant impact on the tourism industry in the IGAD region. Poverty, unemployment, and inadequate infrastructure are some of the challenges that need to be addressed in order to ensure the long-term viability of the industry.

To enhance employment outcomes, improve employee productivity and create a larger and higher-quality labour pool, it is essential to address gender equality, inclusion of a diverse workforce, greater workers' rights, and the reduction of the number of young adults not in education, employment or training. The region has consistently demonstrated gender disparities in employment, with a higher number of males in the working age population despite having more females overall. According to the International Labour Organisation (ILO) report, unemployment rate within the IGAD region was 26.3 per cent in 2017, disaggregated as 36.4 per cent for women and 22.1 per cent for men. The disparity in employment is even more manifest across the age categories, with the highest unemployment recorded for the youth (73 per cent). At a country level, Openness of bilateral Air Service Agreements in Uganda for instance, unemployment is a major issue, with an estimated 9.2 per cent of the population being unemployed. To address this issue, the Ugandan government has implemented a number of initiatives to promote tourism as a means of creating job opportunities and generating income for local communities. For example, the Uganda Tourism Board has launched the Tourism for All programme, which aims to promote inclusive tourism and create job opportunities for people with disabilities. These initiatives have helped to create job opportunities and promote social and economic resilience in the tourism industry.

Levels of poverty remains a key concern in the IGAD region. In Ethiopia for example, poverty is a major issue, with an estimated 24 per cent of the population living below the poverty line as highlighted by World Bank report of 2021. To address this issue however, the Ethiopian government has implemented a number of initiatives to promote economic growth and create job opportunities, such as the growth and transformation Plan, which aims to promote sustainable development and reduce poverty. These initiatives have had a positive impact on the tourism industry, as they have helped to create job opportunities and improve the quality of services provided to tourists.



2.5.3 Travel and Tourism Demand Pressure and Impact

The travel and tourism industry is inherently interconnected with its environment and community.. Unplanned tourism development can cause destinations to exceed their capacity, resulting in overcrowding, harm to natural and cultural resources, pressure on infrastructure, increased housing costs, and reduced quality of life for local residents. If these issues are not addressed, they may lead to a backlash against tourism by residents, reduced visitor satisfaction, and decreased overall attractiveness of the destination, all of which have a negative impact on the development of the travel and tourism industry.

The IGAD region has seen a significant increase in travel and tourism demand in recent years. This growth can be attributed to a variety of factors, including increased mobility, improved infrastructure, and a growing middle class in many countries in the region. Uncontrolled growth in the tourism industry can result in destinations becoming overcrowded, causing damage to natural and cultural resources, straining infrastructure, and driving up housing prices. These issues can lead to a decreased quality of life for local residents. If not dealt with, these problems may provoke a negative response from the community toward tourism, resulting in decreased visitor satisfaction and reduced overall attractiveness of the destination, ultimately affecting the development of the travel and tourism sector¹¹.

Furthermore, the influx of tourists has put significant strain on infrastructure, including transportation systems, water and sanitation facilities, and energy infrastructure. While tourism can bring economic benefits to the region, it is crucial to ensure that these benefits are distributed fairly and do not have a negative impact on local communities. This includes ensuring that local people have access to jobs and business opportunities created by tourism and that their cultural and social values are respected.

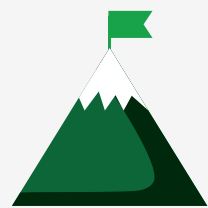
¹¹ World Economic Forum Report 2021-2022

2.6 SUMMARY OF SWOT ANALYSIS



STRENGTHS

- Diverse environmental resources
- IGAD region boasts a rich variety and density of wildlife, along with historically significant cities.
- Rich and varied culinary tradition, ideal for the development of gastronomy tourism.
- Rich culture and heritage with historic sites, vibrant festivals, events, celebrations, and an array of arts and crafts
- Relatively well-established air connectivity and strong trade relations with key source markets in Europe, North America, and the Middle East.
- Already existing successful tourism destinations within the region, such as Uganda, Ethiopia and Kenya, which can serve as benchmarks for the region.
- Recognized need for regional integration, supported by established institutional frameworks and programmes under the IGAD.
- Fast growing domestic and regional markets



OPPORTUNITIES

- Acknowledgement of trans-boundary tourism activities as an effective vehicle for regional integration
- A growing and youthful population providing an enduring pool of human resource
- A fast-growing middle-income class with high propensity for travel
- Untapped natural and cultural resources within the region with potential for development of niche tourism products such as cruise tourism, culture-based tourism, sports, business, conference and health tourism products
- Increased internal and external investor' interest in a number of tourism sectors including the hospitality sector
- Existence of an elaborative plan of action to develop continent-wide infrastructure through the PIDA including the African Integrated High Speed Train Network, the African Open Skies, ICT penetration, and Regional electricity generation
- Existence of a continental integration and development framework i.e. the AU Agenda 2063 with key aspirations of interest to tourism including: regional integration, good governance, peace and security, removal of barriers for intra-regional movement, enhanced intra-regional trade through a continental Free Trade Area, among others.
- The disintermediation effect of ICTs providing cost-effective access to markets.
- Regional joint efforts to address key challenges to safety and security
- Emerging new markets including intra-IGAD, African market, and Asia- China markets

WEAKNESSES



- Challenges in safeguarding cultural heritage, including issues such as poaching, inadequate protection, human encroachment as well as deforestation and habitat loss.
- Economic loss through leakages especially in international tourism due to limited linkages between different sectors.
- Limited and underdeveloped tourism offerings.
- Shortage of skilled personnel for the tourism industry in a number of Member States
- Inadequate investment in high-quality hotel infrastructure and related facilities.
- Poor quality and unsafe ground transportation infrastructure
- Dependence on external markets, with insufficient attention to regional and domestic markets.
- Strong influence of external travel intermediaries on foreign markets and pricing.
 - Cross-border restrictions on labour and people mobility.
 - Challenging air transport environment including high flight costs, limited and low-quality airport infrastructure, insufficient qualified human resources, limited connectivity, and lack of transit facilities, safety concerns, low penetration of low-cost carriers, and a restrictive and uncompetitive regulatory environment.
 - Limited coordination in policies between the tourism sector and supporting sectors such as industry, trade, aviation, and immigration.
 - Absence of an effective well-coordinated regional institutional framework to drive tourism sector development.
 - Uncompetitive business environment characterized by high costs, unclear regulatory and fiscal environment, and corruption.
 - Limited capabilities for tourism disaster and crisis preparedness and management.



THREATS



- Health related issues including cases of disease outbreaks and epidemics,
 - Negative impacts of ICTs on Africa's tourism including the associated costs and effect on changing tourism consumer behaviour and preferences
- Insecurity concerns arising from cases of terrorism, civil war, political tensions, and ethnic tensions and conflicts among others,
- Security-related travel advisories from among the main tourism generating countries
- Impacts of turbulent global economic environment including financial crises and fluctuating energy prices
- Negative global environmental conditions particularly, the effects of climate change and unfavourable mitigation policies.
- Strong competition from emerging and established destinations and regions.



2.7 SUMMARY OF STRATEGIC ISSUES FOR THE IGAD STMP 2024-2034

Given the foregoing analysis, a number of priority intervention areas are necessary to guarantee competitiveness and which would serve as key frameworks for sustainable and long-term tourism growth in the IGAD region.

First, a conducive policy, regulatory and institutional framework is essential for sustainable tourism development in the IGAD region. This is key in ensuring formulation of a regional tourism development framework; easing the barriers to visitor movement within the region; and enhancing destination access by promoting Air Service Agreements and Open Sky policies.

Second, tourism product development is an integral part of the industry's competitiveness and should be sustainable and product-led, as opposed to being market-led as is usually the case in the region. In this regard, a regional STMP should provide a framework for tourism product development. Though the onus of national tourism product development rests upon Member States, key actions for this priority area include:

- Developing tourism related products focusing on quality and sustainability, regional and local community integration and industry involvement to gain maximum economic benefit.
- Enhancing the capacity to strengthen and integrate tourism product development throughout the region.
- Packaging the tourism products to reflect both national and regional identities.
- Creating new products/areas to entice and target new visitors to the destination.
- Improving the performance of existing products and enhancing visitors' experience.

Third and deeply interlinked with tourism product development, is destination marketing, a vital part of destination development. It is envisaged that destination marketing within the IGAD region should be geared towards facilitating the achievement of national tourism policies and plans, which should be coordinated within the regional tourism master plan. In addition, whereas Member States will be encouraged to develop their own strategic marketing plans, these should nonetheless be within the context of the regional goal of building up on the uniqueness of each State to complement the wider IGAD destination with a view to enhancing comparative advantage.

Fourth, appropriate skills and knowledge are essential towards creating human capital, which in turn is critical in ensuring the competitiveness of the tourism industry. In order to ensure a sustained human resource pool in the tourism sector, the following actions are necessary: is standardizing tourism training, promoting continuous capacity development of all persons working within the tourism sector



to promote efficiency and equip them with up-to-date skills and knowledge, formulating appropriate policies and legislation that encourage labour mobility across the region, and establishing centres of excellence in tourism training across the region.

Fifth, provision of a safe and secure environment is a critical success factor for tourism development. As already observed, this is a major challenge facing the IGAD region as a whole due to the prevailing perception of insecurity and political instability given the historical and current evidence of both inter and intra-state conflicts. Important to note, issues relating to safety and security manifest themselves beyond national borders, there is therefore urgent need for concerted regional efforts towards the provision of a safe and secure environment for tourism development.

Sixth, destination competitiveness greatly relies on the availability and quality of the prevailing tourism infrastructure. Whereas, previously national governments played a key role in the provision of such infrastructure owing to the underdeveloped private sectors, increasingly private-public partnerships are preferred. This is indeed a major challenge facing the majority of IGAD Member States. Consequently, the main actions identified for this priority area include creating a conducive environment to encourage investments in tourism infrastructure; creating awareness on the potential opportunities for tourism infrastructure investment; and mobilisation of resources to support tourism infrastructure development.



Seventh, physical infrastructure is essential for tourism development. Provision of such infrastructure, for instance, roads, rail, seaports and airports, electricity, ICT, water and waste disposal systems, can in turn play an important role in encouraging investment in tourism infrastructure. Though the responsibility of developing such infrastructure rests upon the governments of IGAD Member States, this should be done in line with the on-going national and intra-regional. Nonetheless, such initiatives should not be used as the only basis for tourism development, but rather, tourism development initiatives should also serve as an incentive to expand the national and regional infrastructure networks amongst IGAD Member States. infrastructure development initiatives. Key actions identified in this context include: promoting the creation of an enabling transport environment for easy access to tourism products; promoting the development of a regional spatial plan to optimise the development and utilisation of infrastructure facilities and services; facilitating the creation of an enabling transport environment for easy access to tourism products; and strengthening of ICT infrastructure relevant to tourism destination areas.

Lastly, tourism development significantly relies upon and can provide motivation for the conservation of both natural and cultural heritage by enhancing the intrinsic ecological values of biodiversity and socio-cultural and economic development through the sustainable exploitation of such resources in the IGAD region. Given the symbiotic relationship between the industry and these resources, it is important that any negative impacts that could accrue from tourism development be minimised. Whilst the onus of conserving such resources rests upon IGAD Member States, it will be necessary for IGAD, in conjunction with relevant authorities, to oversee the conservation of cross-border resources. Accordingly, therefore, key actions identified for this priority area include promoting land-use planning in tourism priority areas to enhance biodiversity conservation; promoting the development of tourism practices that support conservation principles; and development of guidelines for cultural-based tourism development and cultural heritage conservation.

The above strategic issues cut across what is in the sole mandate of a Member State and what can be shared between the IGAD Member States. In this regard, the STMP 2024-2034 proposes

1. Preparation of a guiding framework for tourism development and
2. Formulation of a regional framework for cooperation in tourism development.



03

The IGAD
Sustainable
Tourism
Master Plan
2024-2034



3.1 RATIONALE FOR THE IGAD STMP 2024-2034

This Sustainable Tourism Master Plan is being developed following the recommendations of the consultative meeting on the IGAD STMP (2013-2023) that was held in Mombasa, Kenya between 24th and 27th October 2023 followed by a virtual meeting of the IGAD Member States STMP focal point officers held on the 18th of March 2024. During these two meetings, tourism stakeholders drawn from IGAD Member States underscored the need for cooperation in enhancing tourism development among the Member States. In this regard, the meetings resolved that a common regional tourism development framework be formulated to guide Member States in planning and developing their individual tourism industries and secondly, that areas where Member States could cooperate in developing their tourism sector be identified and a strategic framework development to guide such cooperation. In doing so, stakeholders noted that this regional Tourism Master Plan be informed by the successes and lessons learnt from the STMP 2013-2023.

The Sustainable Tourism Master Plan (STMP) 2024-2034 is formulated to further the aspirations of the IGAD Mission and objectives, the Protocols on the Free Movement of Persons by both the AU and IGAD, AU/NEPAD Tourism Action Plan, AU Minimum Integration Plan, the AU Agenda 2063 flagship project of ‘making Africa the preferred destination for tourism’, the African Tourism Strategic Framework 2019-2028 (ATSF 2019-2028), the African Continental Free Trade Area (AfCFTA), and the UN Sustainable Development Goals (SDGs) targets in Goals 8, 12 and 17.

3.2 PROCESS OF PREPARING THE STMP 2024-2034

Formulation the Sustainable Tourism Master Plan (2024-2034) for the IGAD region adopted a comprehensive and inclusive process. The process commenced with a stakeholders’ evaluative consultative meeting on the IGAD Sustainable Tourism Master Plan (2013-2023) held in Mombasa, Kenya, from October 24th to 27th, 2024. This meeting evaluated the outcomes of implementation of the outgoing STMP and set the foundation for subsequent activities. A second meeting was held jointly between IGAD Secretariat, focal point officers from IGAD Member States and UNECA on March 18th, 2024. The meeting set forth the agenda and approach for formulating the STMP 2024-2034. This was followed by the appointment of a consultant, to lead the process. An analysis report was prepared capturing the state of affairs on tourism development within IGAD region and the global scene. Further included were views from national level stakeholders that were obtained throughout the month of May 2024 ensuring diverse perspectives were incorporated.

Out of this analysis, key strategic issues and priorities were identified. Possible Strategic Actions and implementation framework were also included in the Analysis Report. The Report was then presented for discussion and adoption

during a second consultative meeting that took place in Diani, Kenya, between 17th to 21st June 2024. The meeting refined the strategies and frameworks and recommended preparation of the draft STMP 2024-2034.

Finally, the draft IGAD Sustainable Tourism Master Plan (2024-2034) was validated in Addis Ababa, Ethiopia, from July 23rd to 25th, 2024. Here, stakeholders from across the region converged to endorse and finalize the comprehensive blueprint aimed at fostering sustainable tourism development within the IGAD Member States. This process ensured that the IGAD Sustainable Tourism Master Plan 2024-2034 was robust, inclusive, and ready for implementation, marking a significant milestone in regional collaboration and sustainable tourism development across the IGAD region.

3.3 UNDERPINNING REGIONAL AND GLOBAL DEVELOPMENT FRAMEWORKS

A number of regional and continental socio-economic development initiatives underpins the formulation of IGAD STMP 2024-2034. Key among such initiatives are discussed below.

The Mission of the IGAD

The mission of IGAD is to assist and complement the efforts of the Member States to achieve, through increased cooperation: food security and environmental protection, peace and security, and economic cooperation and integration in the region. The particular objectives of IGAD that are applicable to this STMP include the following:

1. Promoting joint development strategies and gradually harmonize macroeconomic policies and programmes in the social, technological and scientific fields.
2. Harmonizing policies with regard to trade, customs, transport, communications, agriculture, and natural resources, and promote free movement of goods, services and people within the region.
3. Creating and enabling environment for foreign, cross-border and domestic trade and investments.
4. Initiating and promoting programmes and projects for sustainable development of natural resources and environment protection.
5. Developing and improving a coordinated and complementary infrastructure, in the areas of transport, telecommunications, and energy in the region.
6. Mobilizing resources for the implementation of emergency, short-term, medium-term and long-term programmes within the framework of regional cooperation.



The IGAD Free Movement of Persons Protocol

The IGAD Member State Ministers in charge of Internal Affairs and Labour approved the IGAD Protocol on Free Movement of Persons in 2020. The Protocol is enshrined in the 1996 Agreement Establishing the Intergovernmental Authority on Development (IGAD), Art. 7(a) and Art. 13(o), where the Agreement establishing IGAD calls upon IGAD Member States to deepen regional integration through, among other things, creating a regime of free movement of persons, right of residence, and right of establishment. Today, five IGAD countries have signed the Protocol, namely the Republic of Sudan, the Republic of South Sudan, the Federal Republic of Somalia, and the Federal Democratic Republic of Ethiopia, and the Republic of Uganda.

Free movement of people across Africa and IGAD specifically, represents a powerful boost to economic growth and skills development when people can travel with ease for business, tourism or education. What is more, free movement in the IGAD region can address some of the major challenges that many IGAD labour markets face. It can plug skills gaps while enabling countries to fix skills mismatches in their labour markets. With more people able to move freely, firms can much more easily find the necessary talent and skills that they need. This is critical to driving productivity, which in turn, has an impact on the economic growth of countries. The IGAD STMP 2024-2034 will seek to leverage on these benefits and equally provide an economy rationale for region-wide adoption of the Protocol.

Other relevant IGAD regional initiatives include the Nairobi Declaration on Ending Drought Emergencies in the Horn of Africa (2011), the IGAD Conflict Early Warning and Response Mechanism (2002), Climate Prediction as conducted by the IGAD Climate Prediction and Applications Centre (ICPAC) through the Greater Horn of Africa Climate Outlook Forum Climate Prediction (GHACOF), the Nairobi Protocol on the Prevention, Control and Reduction of Illicit Small Arms and Light Weapons in the Great Lakes Region and the Horn of Africa (2004), and the Protocol on the Prevention, Combating and Eradication of Cattle Rustling in the Eastern Africa Region (2008)

Africa Union Agenda 2063 initiatives

a) ‘Making Africa the preferred destination for tourism’

Agenda 2063 Framework was adopted by the African Union Summit in January 2015. Agenda 2063 is a shared strategic framework for inclusive growth and sustainable development. The Agenda specifically identifies tourism as a key economic sector for the region’s economic transformation and as a driver for continental integration, and as a source sector for Domestic Resource Mobilization (DRM) towards financing implementation of the Agenda 2063. In view of this recognized

potential, the AU Agenda 2063 identifies ‘*making Africa the preferred destination for tourism*’ as one of its flagship projects. The first Ten-Year Implementation Plan (FTYIP 2013-2023) highlights importance of the tourism industry and sets key targets including increasing the industry’s GDP contribution by 100 per cent and doubling of the 2013 intra-regional tourism levels.

b) The AU Protocol on the Free Movement of Persons

Another key initiative under the AU Agenda 2063 is the *AU Protocol on the Free Movement of Persons* that envisions establishment of African Passport and removing visa requirements across the continent. First conceived more than 25 years ago in the 1991 Abuja Treaty, the Free Movement of Persons in Africa, a flagship programme of the African Union’s Agenda 2063, is an aspiration for the continent or a tool for harnessing regional connectedness, integration, broader trade, labour migration or development goals, consistent with the Global Sustainable Goals of the United Nations 2030. The Protocol on Free Movement was adopted at the AU Summit in January 2018. In line with this aspiration, the IGAD STMP 2024-2034 seeks to facilitate intra-regional movement of visitors and labour.

c) The Single African Air Transport Market (SAATM)

Probably one of the most important initiatives under this Agenda is the *Single African Air Transport Market (SAATM)* that seeks to create a single unified air transport market in Africa to advance the liberalization of civil aviation in Africa. It is foreseen that SAATM will ensure aviation plays a major role in connecting Africa, promoting its social, economic and political integration and boosting intra-Africa trade and tourism as a result. The IGAD STMP 2024-2034 seeks to leverage on this initiative and provide a demand-led justification for Member States to participate in the SAATM.

Other key Agenda 2063 aspirations envisaged to be realised within the FTYIP and that are significant to tourism development include:

- Blue/ ocean economy for accelerated economic growth
- Preservation of peace security and stability
- Development of world class infrastructure including communications and infrastructure connectivity through PIDA
- African cultural renaissance
- Africa taking full responsibility for financing her development



d) African Tourism Strategic Framework 2019-2028 (ATSF 2019-2028)

Arising from the targets of FTYIP 2013-2023, the African Union Commission formulated the Tourism Strategic Framework that seeks to provide strategic action plans geared towards development of a competitive, sustainable and integrated tourism industry in Africa. In this context, the ATSF 2019-2028 seeks to pursue three core Strategic Directions:

- i. Develop a globally competitive African Tourism brand
- ii. Ensure that African tourism is sustainable, inclusive and a driver for regional integration
- iii. Formulate an enabling tourism policy, regulatory and institutional framework

Towards advancing IGAD tourism alignment with this regional framework, the STMP 2024-2034 will advance the development of a globally competitive regional tourism by offering diverse and authentic experiences to IGAD residents and visitors alike.

e) The African Continental Free Trade Area (AfCFTA)

The African Continental Free Trade Area was founded in 2018 by the African Continental Free Trade Agreement among 54 of the 55 African Union nations with trade commencing as of 1 January 2021. One of the key Agenda 2063 aspirations, AfCFTA seeks to accelerate intra-African trade and boost Africa's trading position in the global market. On liberalization of trade in services, the AfCFTA identifies tourism as one the seven priority sectors with the rest being logistics and transport, financial services, professional services, energy services, construction, and communications. It is envisioned that the IGAD region will benefit from the AfCFTA Agreement including contribution to greater market access for tourism businesses and operators; economies of scale in production and quality supply of tourism services; better opportunities for networking and complementarity for the tourism industry; reducing tourism services costs; facilitating investment in vital tourism infrastructure; and enhanced collaboration among tourism businesses and operators and their eventual participation in regional tourism value chains¹².

¹² As opined by Desire Loumou, Head of Division Intellectual Property Rights of the AfCFTA Secretariat – Accra – Ghana.



UN Sustainable Development Goals (SDGs)

Adopted during the 70th Session of the UN General Assembly, the 2030 Agenda for Sustainable Development stipulates 17 Sustainable Development Goals (SDGs) that aim to, *inter alia*, - end poverty, protect the planet, and ensure prosperity for all. Within this 2030 Agenda, the significance of the tourism industry as a tool for global sustainable development is clearly highlighted. Whereas tourism can in one way or the other contribute to all the 17 goals as demonstrated by the UNWTO (2015)¹³, the sector's direct contribution is identified in the following three SDGs

- **Goals 8:** on inclusive and sustainable economic growth. Target 8.9 commits Member States to “devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products”.
- **Goal 12:** on sustainable consumption and production (SCP). Specifically, SDG Target 12.b highlights the importance of sustainable tourism as a driver for jobs creation and the promotion of local culture and products
- **Goal 14:** on sustainable use of oceans and marine resources, respectively. In particular, SDG Target 14.7 identifies tourism as one of the tools to “increase the economic benefits to Small Island Developing States (SIDS) and the Least Developed Countries (LDC)” , and
- **Goal 17:** Partnership for the Goals.

The IGAD STMP will play a key role in formulation of sustainability policies at regional level, and more so in mobilizing the travel trade and visitors in promoting sustainable consumption and production, and enhancing relevant partnerships.

¹³ UNWTO (September, 2015). Tourism and the Sustainable Development Goals. Available in <https://www.e-unwto.org/doi/book/10.18111/9789284417254>



The UNWTO ten priorities of the Agenda for Africa

Adopted during the 61st UNWTO Regional Commission for Africa held in Abuja, Nigeria, (4 - 6 June 2018), the UNWTO ten priorities of the Agenda for Africa identifies ten key areas that it would seek to collaborate with Africa in line with the provisions of the UN Sustainable Development Goals. The Ten priorities identified are:

1. Advocating the Brand Africa,
2. Promoting Travel Facilitation (Connectivity / Visa)
3. Strengthening Tourism Statistics Systems
4. Expanding of Capacity Building incl. Training Facilities,
5. Promoting Innovation and Technology
6. Fostering Resilience (Safety and Security, Crisis Communication)
7. Unlocking Growth through Investment Promotion by Public Private Partnerships
8. Empowering Youth and Women through Tourism
9. Advancing the Sustainability Agenda (especially, Biodiversity)
10. Promoting Cultural Heritage

In view of these UNWTO priorities, the IGAD STMP 2024-2034 focus on promoting innovation and technology adoption in tourism, championing destination resilience, advancing the sustainability agenda and promoting niche products within the IGAD Region.

3.3 BUILDING ON THE STMP 2013-2023

The aspiration to develop a competitive and sustainable tourism industry within the IGAD region through an integrated framework was first mooted through the formulation of the first Sustainable Tourism Master Plan (STMP) 2013-2023. The 2013-2023 STMP was guided by the mission, aims, objectives and principles of IGAD and further informed by the Africa Union (AU) Minimum Integration Programme (MIP) Instrument. The Tourism Action Plan Africa 2004 additionally informed the STMP for the New Partnership for Africa's Development (NEPAD).

In line with these frameworks, the main aim of the IGAD STMP 2013-2023 was to provide Member States with a regional framework for sustainable tourism development with a view to contribute to socio-economic development and poverty alleviation and to promote regional integration. The STMP was guided by the following underlying principles:

1. Tourism development should be sustainable providing both inter-generational and intra-generational equity;
2. The Master Plan should provide a vision for tourism development in the region;



3. The master plan should enhance the competitiveness of the IGAD region as tourist destination;
4. Tourism development strategies should be in line with the wider national, regional, continental and international development initiatives and economic development plans; and that
5. Tourism development should be guided by sound research

A number of priority intervention areas were included in the STMP that were considered necessary to guarantee regional competitiveness and which would serve as key frameworks for sustainable and long-term tourism growth. These areas included:

1. Policy and Regulatory Framework
2. Tourism Infrastructure
3. Tourism Product Development
4. Infrastructure Development
5. Tourism Marketing
6. Tourism, Natural and Cultural
7. Human Resource Development
8. Tourist Safety and Security
9. Heritage Conservation
10. Research and Development

Key achievements

The STMP ended in 2023 and an evaluation undertaken across the Member States to ascertain the outcomes of its implementation.

Overall, it was observed that whereas the STMP was largely unknown within the tourism sector in most of the Member States, it had realised a number of successes in its implementation

- The STMP served as a reference document for the formulation of the Ethiopia and Uganda National Tourism Master Plan.
- It resulted in a number of regional integration initiatives different areas of the tourism sector
- Enhanced tourism awareness at the level of communities
- The STMP helped in making travellers more aware of new tourism products and experiences.
- Issues of sustainability have been brought to the fore as many tourism players have adopted and implemented practices to ensure tourism benefits the local community and environment in the long term.

- Member States and private sector have continued to realise the need for supporting regional tourism initiatives. The private sector is increasingly taking up and providing regional tourism packages.
- Businesses are more aware of the importance of Sustainable Tourism Practices in their areas of operations and are sensitive to employing best practices.

The above notwithstanding, a number of bottlenecks were noted that hinder full realization of the IGAD STMP 2013-2023 aspirations. These include

- Lack of commitment from the members of the region. For instance, in poor initiatives to mobilize resources like finance, human capital, (skilled manpower in the sector)
- Incidences of border conflicts and misunderstanding between the neighbouring countries
- Cases of Political instability and/or uncertainty
- Lack of a coordinated approach in tourism development by various stakeholders in tourism. Various countries not fulfilling their part in agreed agreements made that affect tourism directly or indirectly.
- Regional tourism initiatives were not fully implemented due to the continued effect of COVID-19
- Lack of financial support for implementation of the regional Master Plan
- Limited cooperation of the IGAD Member States in the development of Tourism
- Lack of effective implementation mechanism
- Inadequate infrastructure including roads and airports connecting IGAD Member States.
- Most Member States did not fully mainstream the Master Plan in national planning since they were not given guidelines on how that can be done. Hence need to provide guidelines, ensure each member state has a contact person
- There has been limited collaboration in human resource development - training and research institutions have no collaboration platform - hence need to establish a collaboration platform and support a mechanism that facilitates staff and student exchanges, organizing of regional tourism conferences etc.

Lessons learnt from the implementation of STMP 2013-2023

Out of these successes and bottlenecks, a number of lessons can be drawn that would inform the success of a the next STMP for the IGAD region

1. Goodwill from the Governments of Member States is a critical factor in the implementation of the STMP
2. The citizens of the Member States need to identify with IGAD and with each other. Facilitating people movement and activities that would bring the region together is therefore important.
3. Promotion of uptake including awareness campaigns, cascading regional



plans into national level plans, and a clear and sustained communication strategy including information exchange to build trust

4. A country-specific approach to implementation should be the preferred option. This can be benchmarked on the Northern Corridor Infrastructure project that has both internal and external support; and One-Stop Border Project in the EAC,
5. Implementing a regional STMP requires a clear monitoring and evaluation framework
6. A sustainable financing model for implementation of the STMP especially the joint programmes. IGAD should take lead in establishing and supporting such a funding model.
7. Regional approach to disaster/crisis management?

There is therefore need to isolate the programmes that can be implemented jointly and provide a priority map for them. In addition, there should be a Regional Tourism Development Guide that would serve to guide Member States on tourism planning and ensure a harmonised approach in tourism planning within the IGAD region.

3.4 VISION OF THE IGAD STMP 2024-2034

To position the IGAD region as a cohesive, globally competitive, and sustainable tourism destination

3.5 AIM AND OBJECTIVES OF THE IGAD STMP 2024-2034

The main aim of the STMP is to provide IGAD Member States with a regional framework for sustainable tourism development with a view to contributing to socio-economic development, poverty alleviation and to promoting regional integration.

Specifically, the STMP seeks to:

1. Identify strategic areas of cooperation in tourism development among the IGAD Member States
2. Identify appropriate strategies and actions that can enhance the competitiveness of individual IGAD Member States and subsequently the IGAD region as a global tourism destination.
3. Provide a detailed roadmap for the implementation of the STMP strategic actions

4. Develop an efficient coordination mechanism for tourism development within the IGAD region.
5. Formulate a resource mobilization plan to ensure sustainable financing of the STMP priority programmes.

3.6 GUIDING PRINCIPLES OF THE STMP 2024-2034

Generally, the STMP adopts a stakeholder-led tourism planning and development approach that allows linking of the framework for decision-making to other economic sectors, and one that takes on board the views of relevant stakeholders including government, private sector, academia, civil society and local communities. While the STMP is designed to be goal-oriented in nature as opposed to being reactionary, it is also designed to accommodate changes in both the internal and external tourism environment.

The formulation of the IGAD STMP 2024-2034 will be guided by the following principles:

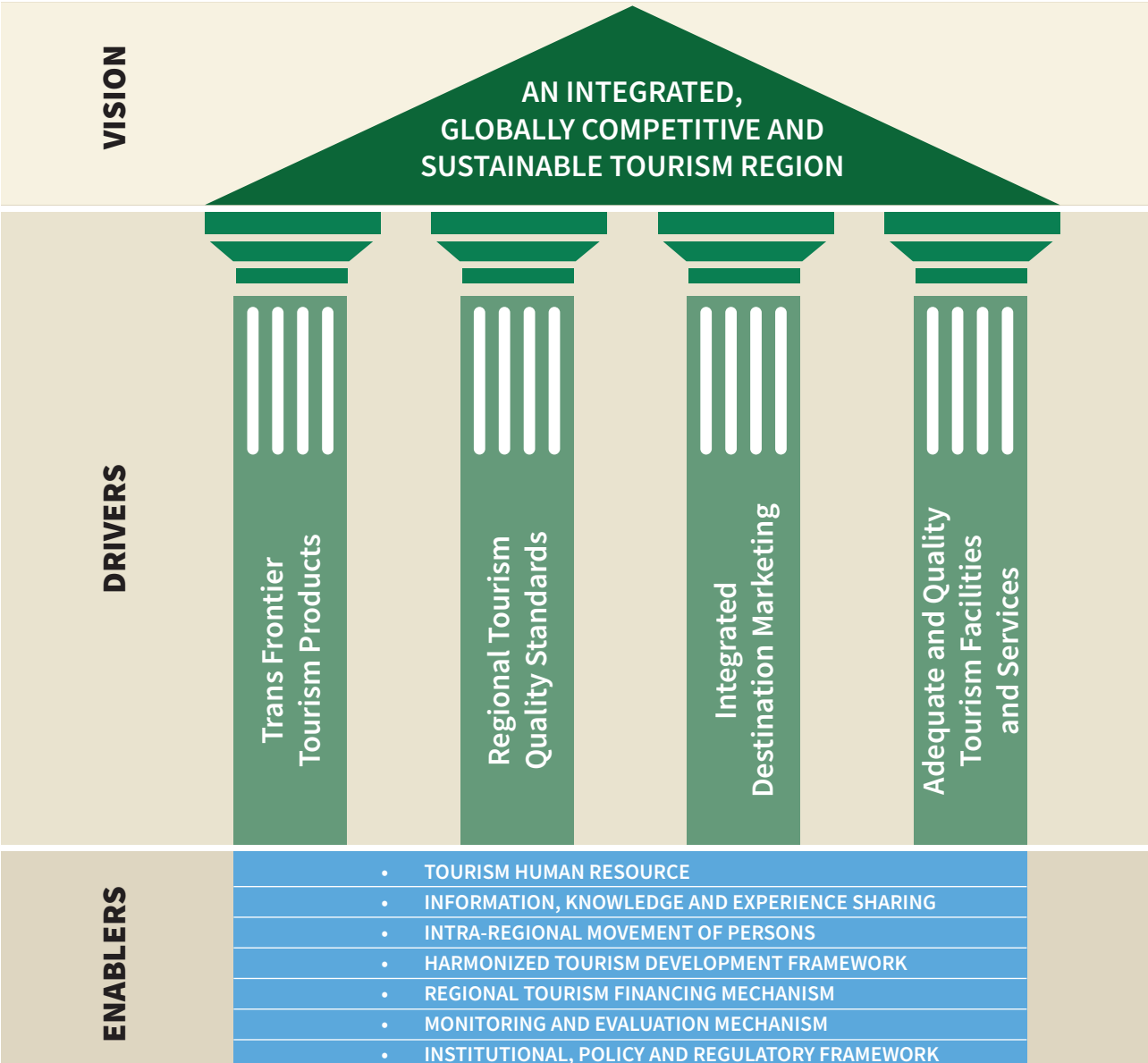
1. The STMP should facilitate deeper regional integration within the IGAD region, aligning with IGAD's mission and broader goals to enhance collaboration and mutual benefits among Member States
2. The Master Plan should articulate a clear and compelling vision for tourism development in the IGAD region, and outline strategic interventions to achieve this shared vision
3. The STMP should strengthen the competitiveness of the IGAD region as a premier tourist region through targeted strategies that enhance attractiveness and market positioning
4. Tourism development strategies should be harmonized with the wider national, regional, continental, and international tourism and related sectoral initiatives to ensure coherence and maximize impact
5. The Master Plan should promote the principles of interdependence and mutual interest among IGAD Member States
6. The STMP should enhance local capacity for tourism development by implementing policies that support skills training, access to funding and markets, and integration into the tourism value chain.
7. The STMP should provide avenues to deepen partnerships in tourism development between the public and private sectors, development partners, and civil society
8. The development of tourism in the IGAD region should pursue an integrated approach with specific focus on developing and optimizing its value chain and creating policy-convergence and synergies with relevant economic sectors.



3.7 IGAD STMP 2024-2034 STRATEGIC DIRECTION

To realize the Vision of the IGAD STMP 2024-2034, it will be necessary to focus on key priority intervention areas essential to guarantee competitiveness and serve as key frameworks for sustainable and long-term tourism growth. In this context, the STMP will focus on Four Drivers of competitiveness and SEVEN enablers as provided in the Strategic Map below:

FIGURE 3.1: IGAD STMP 2024-2034 Strategic Framework



Each of these Pillars is presented below as STMP Priority Area



PRIORITY AREA 1:

DEVELOPMENT OF TRANS-BOUNDARY TOURIST PRODUCTS

Introduction

Numerous opportunities exist for transborder tourist products in the IGAD region including cultural tourism products, wildlife, and marine-based products among others. These products would appeal to respective domestic markets, regional markets and international market alike. Destination development plans will consider the potential for alignment and synergy with regional products and markets. This would call for preparation of development plans with respective partner countries. A good example is SADC region's collaborative programme called *Boundless Southern Africa* which focused on the development and marketing of trans-boundary conservation areas. Such plans were also envisioned in the IGAD region's *Sustainable Tourism Master Plan (2013-2023)* and COMESA's product diversification effort that among others, seeks to develop transboundary tourism packages. Examples abound where such an approach has been used for instance the EU "Napoleon route" and "Wine route", Euro-Asian "Silk Route" among others.

Strategic Objective:

Develop integrated tourism products across the different IGAD Member Countries

Strategic Actions

Specific actions in this programme will thus focus on the following areas

- 1. Map potential transboundary flagship tourism products**
An inventory of all possible flagship transboundary tourism products will be established. Such inventory will provide different categories of tourism products.
- 2. Formulate product development plans for trans-boundary flagship products**
Upon establishment of the potential flagship trans frontier tourism products, product development plans will be formulated clearly identifying the scope of activities, attractions, facilities, routes, infrastructure requirements, zoning requirements, among others. The plans will also project the financial resource requirement and develop an investment promotion proposal.
- 3. Implement transborder tourist product development plans**
Implementation of the transfrontier product development plans will focus on public sector infrastructure development and seed investments, and implementing initiatives to attract private investments.



PRIORITY AREA 2: REGIONAL TOURISM QUALITY STANDARDS

Introduction

An emphasis on service excellence and service standards will be integral towards tourism product development in the region. This will be enhanced through the adoption of international service standards, benchmarks and voluntary certification schemes that address service quality, sustainability as well as service excellence¹⁴. While promoting tourism growth in the region, it is vital to ensure that such growth is based on customer-focused services that are world-class. Further, the promotion of industry products and service standards that are customer-focused will be critical towards enhancing the competitiveness of the region.

Strategic Objective:

Establish uniform quality standards for the tourism sector across the IGAD region to enhance service consistency, improve visitor experiences, and promote regional competitiveness.

Strategic Actions

1. Develop unified quality standards for the tourism industry

To guarantee that tourist facilities meet international service standards, the need for classification of such facilities cannot be gainsaid. To achieve this, a classification criterion, benchmarked on the best global standards will be developed. This tool will have different modules for the different types of hospitality facilities including hotels, guest houses, lodges, and restaurants, among others. It is important to note that such a tool will not only be used for classification purposes, but will also serve as a guide to hospitality investors and facility developers.

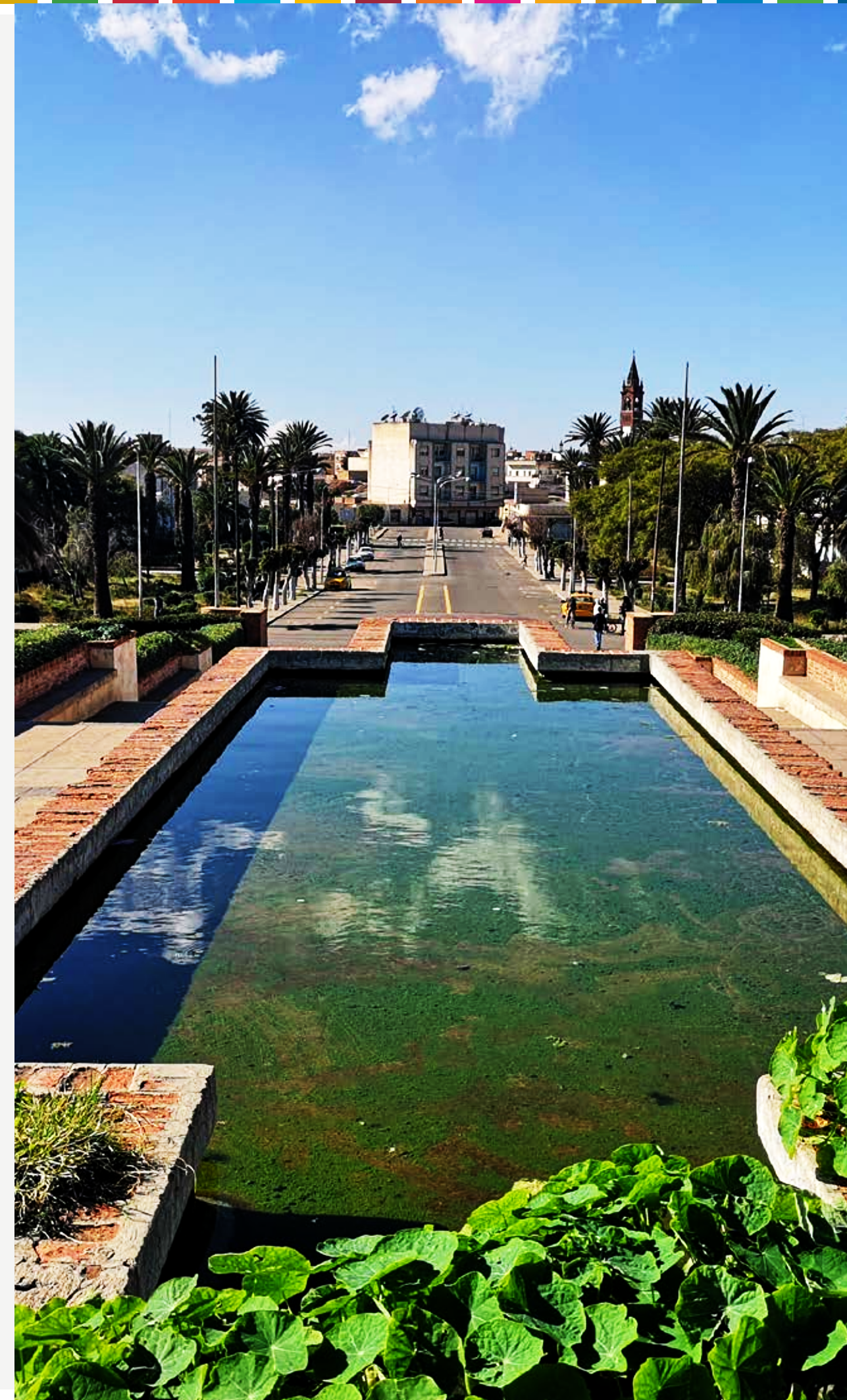
This classification tool will be developed through a multi-stakeholder consultation and be implemented through a multi-stakeholder body at each Member States level bringing together representation from both the public and private sector players with representation from the region.¹⁵

2. Create a Regional Quality Standards Certification Programme

Develop a certification programme that recognizes and rewards tourism businesses and destinations that meet or exceed the quality standards

¹⁴ This will be modelled after such leading approaches as the *Swiss Model for Total Quality Management* (The “Quality Seal of Approval for Swiss Tourism”) and the European Foundation for Quality Management.

¹⁵ Lessons can be drawn from the EAC Hotel Classification system that is currently being implemented within the EAC Member states including four IGAD Member States. IGAD will consider entering into discussion with EAC to assess the possibility of extending the same system into the rest of its Member States



PRIORITY AREA 3: TOURISM PROMOTION AND MARKETING

Introduction

Tourism marketing will be an integral component of destination growth and development. While product development is associated with the creation of attractions or experiences, marketing plays a key role in communicating the value and appeal of the products to would-be consumers and is an essential tool for enhancing destination competitiveness. The main objective from the demand-side is to increase visitor numbers, while from the supply-side, marketing can be instrumental in attracting investors to invest in a range of destination goods and services including accommodation, entertainment, retail and infrastructure, thereby further boosting tourism growth and development. This Priority Area focuses on strategic interventions to market IGAD region as a tourism destination in international and regional markets.

Strategic Objective:

Market and promote the IGAD Member States as competitive destinations for both regional and international visitors

Strategic Actions

- 1. Formulate a regional tourism marketing strategy**
Strategic positioning of the IGAD region as a globally competitive tourism destination will require formulation of a regional tourism marketing strategy. This will focus on international and regional positioning of each Member State and the region in general
- 2. Pursue a unified promotional effort in the international marketplace**
A unified promotional effort in the international marketplace will be adopted within the IGAD region. This will involve coordinating efforts from Member States to market the region as a single destination therefore sharing costs and demonstrating areas of complementarity.
- 3. Create a destination marketing strategy for the IGAD regional Market**
To ensure increased intra-regional travel, there is need to formulate tourism marketing strategies at country level targeting this market. This would be essential to guide development of the regional tourism market and promotion of Member States as destinations for the regional market. This will involve among others,
 - Organizing rotational tourism exhibitions in each Member State,
 - Organizing events geared towards showcasing IGAD region to IGAD residents and



- Promoting initiatives to drive people-to-people interaction and cultural exchanges including sports and cultural events
- 4. Develop a Destination Management System and a Tourism Portal**
ICT-based destination management systems are today a source of competitive advantages for destinations worldwide. A Destination Management Systems (DMS) for the IGAD region will be developed to provide an avenue through which tourism products can be distributed through various channels¹⁶.

A regional DMS will be thus crucial in providing in-depth information of what each country has to offer and encompass issues relating to product management, enquiry management services, visitor relations management, and facilitate bookings.

In addition, the creation of a regional user friendly and informative tourism portal will be needed to ensure provision of comprehensive, reliable, and accessible information on the range of sites, experiences, and resources available to travellers.

¹⁶ Successful case studies include the EU and the ASEAN region where all the member countries display information on their tourism offering in a joint DMS

PRIORITY AREA 4:

PROMOTING TOURISM INVESTMENT IN THE REGION

Introduction

The need for world-class tourism infrastructure remains an urgent need across the IGAD region. As noted in the situational analysis, the IGAD region as a whole is attracting relatively small number of international hotel chains just as an indicator of the tourism FDI. Attracting and retaining tourism investments in the IGAD Member States will therefore be a priority during this STMP. This will be aimed and creating employment and guaranteeing adequate supply of tourism facilities and services. To achieve this, the following Strategic Actions

Strategic Objective:

Promote the IGAD region as an attractive investment destination for tourism investors with a view to enhancing the capacity of the region to offer competitive facilities and services, create employment, and contribute to overall economic development.

Strategic Actions

1. Prepare an Investment Promotion Guide for the IGAD region

To guide the Member States in the promotion of tourism investments, a tourist investment guide will be developed for the IGAD region. This will ensure inventorizing the tourism investment opportunities in each Member State in the different tourism subsectors and product categories.

In addition, the guide will feature

- An indicative investment capital requirements
- Public sector support infrastructure development plan
- Investment incentives

This investment guide will be used an investment promotion tool.

2. Member States adapt the joint Tourism Investment Promotion Guide

The goal of this will be to showcase potential tourism investment opportunities in the region and interest investors to take up the opportunities. Investment promotion events will be organized internationally, regionally and internally to meet potential investors. A keen focus will also be dedicated towards efforts to involve African diaspora in promoting investment in tourism. Ethiopia for instance, has developed initiatives targeting the diaspora, which can also be utilized in investment promotion for the tourism sector.¹⁷

¹⁷ Lessons from initiatives in Nigeria, Kenya, and Afghanistan serve as examples of similar types of mechanisms targeting diaspora investment. The Afghanistan Investment Guarantee Facility (AIGF) is a good example.



PRIORITY AREA 5:

TOURISM HUMAN RESOURCE DEVELOPMENT

Introduction

Human resource development is key to enhancing the competitiveness of any given tourist destination. Given that the tourism industry is largely service oriented, the role of human resources is ever more important. In the IGAD region, there inter-regional variations in the global ranking of literacy levels within the region. The quality and accessibility of training facilities also varies significantly and more efforts is needed to develop sufficient human capital for tourism. Important to note is that when considering the development of human resources for the tourism sector, it is essential that a holistically approach is taken to include those working directly in the industry or private sector, those in the training institutions, and those charged with the responsibility of policy and planning for the sector. Nevertheless, there are opportunities that exist in the region presented by regional integration. This would however require formulation of appropriate policies and legislation that encourage labour mobility across the IGAD region. It would also be appropriate for Member countries to support establishment of centres of excellence and strengthen existing ones in tourism and hospitality training across the region.

This programme area aims at build long-term supply of globally competitive human resource for the sector

Strategic Objective

To guarantee that each IGAD Member State has adequate and qualified and that is sufficiently facilitated human resource at all levels of the tourism sector including business operations and management, destination policy, development and management, and research and academia.

Strategic Actions

Focus of Strategic actions under this priority area will be on

1. Bridging the short-term HR needs for the tourism sector within the IGAD Member States
2. Development of a sustainable supply of globally competitive human resource for the tourism sector.

1. Bridging the short-term HR needs for the tourism sector within the IGAD Member States

This will be achieved through the following measures

a. Formulate a short-term HR Development Strategy for the tourism industry IGAD Region

Noting the existing dire need for qualified human resource among a number of IGAD Member States, there is an urgent need to design a strategy aimed at addressing this need in the short term. In view of this, a short-term HR Development Strategy that would yield results in the short to medium term will be formulated for the IGAD region. This Strategy will

- Undertake Capacity Needs Assessment for the tourism industry within each Member State,
- Identify existing opportunities within the region to address such skills gap both internally and across the region,
- Assessment and Realignment of policy, regulatory and practical interventions necessary to support addressing of the gaps
- Design a HR development action plan
- Implement the short-term HR Development Strategy

b. Promote intra-regional labour mobility to bridge the short-term HR deficit in the Member countries

This will involve strategically encouraging and incentivising professionals from the region and African countries with the necessary skills and knowledge to both work and train the locals. This is a worldwide practice in addressing both the short-term human resource deficits and knowledge transfer. It is important to note that

- This initiative will only be a short-term measure as the concerned Member State put in place measures to develop their tourism HR base.
- Secondly, the scheme would only target those skills and competencies not available within the particular Member State
- The scheme will also require the employing organizations to provide a roadmap on how and when such foreigners will be replaced with locals.

c. Establish intra-regional apprenticeship programme

This will involve establishing and popularise a “Training of Trainers (ToT) programme” that will facilitate creation of opportunities in Member States for trained labour from sister IGAD States to learn on the job before transferring the same skills back to the home country. The International Labour Organisation

(ILO) indeed recommends informal apprenticeship systems¹⁸ in the tourism sector as a way to boost vocational attainment. This could contribute to talent being sustainably available to both large and small-scale tourism enterprises and promote greater youth entrepreneurship in tourism.

The framework will cover all levels of labour including training institutions, public sector, private sector, and tourism civil society.

2. Develop Sustainable supply of globally competitive human resource for the tourism sector in Africa

a. Harmonize tourism training and certification amongst IGAD Member States

Article 65 of the Abuja Treaty advocates for the creation of an environment that encourages capacity building and the use of African skills and human resources in tourism development. There is therefore need to harmonize and promote inclusive tourism training within and across the IGAD countries. Such an endeavour would enhance the practicability of training and its abilities to meet the needs of the industry. This will entail formulation of harmonized tourism training curricula across the IGAD Member States.

b. Establish centres of excellence in tourism training across the region

To ensure the realization of quality training for the industry within the region, it is necessary that model centres of excellence, and capacity building mechanisms benchmarked on the best practices in the world, be established in each of the IGAD Member States. To begin with, necessary policies and legislations should be formulated to allow the IGAD Member States to utilize recognized centres of excellence in the region such as Kenya Utalii College (KUC). It is envisioned that each Member State will establish at least one premier centre of excellence in tourism and hospitality training that will serve as trainer of trainers across the country.

¹⁸ According to ILO (2017b), an informal apprenticeship is a “system by which a young apprentice acquires the skills for a trade or craft in a micro [enterprise] or small enterprise learning and working side by side with an experienced practitioner [...] a training agreement that is embedded in local norms and traditions of a society”.



PRIORITY AREA 6:

INTRA-REGIONAL MOVEMENT OF PERSONS, GOODS AND SERVICES IN THE TOURISM SECTOR

Introduction

The potential benefits of increased movement within the IGAD region and Africa by extension cannot be overstated. This is seen as a catalyst for socio-economic development with potential positive impact on trade, boost tourism, ease demographic pressure in sending countries and increase cultural exchange tourism. In addition to these, evidences from other regions such as the European Union has shown that free movement of persons can address labour markets deficits since firms can much more easily find the necessary talent and skills that they need. This is critical to driving productivity, which, in turn, has an impact on the economic growth of countries. However, free movement of persons in the African region and IGAD in particular is partly stifled by visa hurdles and stringent entry rules, which make it strenuous for citizens to move from one country to the next.

Despite its benefits, free movement also brings its own challenges. Real fears over possible job losses and dampening of wages for local workers in destination countries must be acknowledged. These concerns are especially prevalent in Africa's upper middle-income countries. In addition, while remittances are of significant benefit to countries of origin, concerns over brain drain and the consequent loss of working-age individuals persist. Other significant risks include the potential increase of violent incidents driven by xenophobia as well as the continent's mounting security threats, including those of terrorist groups that cut across borders such as Boko Haram and al-Shabaab. These given, evidence demonstrates that African Regional Economic Communities (RECs) which have already made significant strides on free movement of persons offer useful lessons on how to effectively implement free movement regimes.

To facilitate intra-regional opportunities, a policy framework will be formulated allowing intra-regional movement of people for such a purpose.

Strategic objective

To facilitate unhindered movement of persons, goods and services within the tourism sector within the IGAD region.

Strategic Actions

1. Adopt favourable visa regimes

In addition to measures targeting intra-regional travellers, IGAD Member States would need to formulate appropriate policies and legislations to ensure that the region puts in place measures to enhance travel into the region. While matters of national security take precedence, the process of obtaining visa

for business and leisure tourism requires simplifying and upgrading both operationally and technologically. Possible strategies will include

- i. Visas on arrival and Visa waivers for visitors coming from target source markets.
- ii. Enabling tour operators to pre-arrange visas
- iii. Adoption of Electronic Travel Authorization (ETA) programme (an electronically-stored travel authorization for travel linked to the traveller's passport)
- iv. Adopting common visa schemes within IGAD
- v. Other considerations will include:
 - Visa free travel for visitors travelling in groups
 - Visa free travel during specific months of the year
 - Visa free entry for specific lengths of stay
 - Visa waiver programme for a particular region/ destination within a country
 - Multiple-entry visas to IGAD Member States

2. Review and align air transport policies with tourism development strategy

Noting the significance of the air transportation sector to the growth of the tourism industry, IGAD Member States will need to pursue policy convergence between the two sectors. As a starting point, Member States will review and align air transport sector policies with their tourism development strategy.

Further, for a mutually beneficial outcome for the two sectors within the region, Member States should pursue a tourism and aviation policy trade-off approach. Such policy trade-off should focus on improving efficiency along those tourism value chains linked with air transport. This would improve both the tourism sector's competitiveness and create favourable conditions for more accessible airfares and traffic. In addition, such policy trade-off should be informed by quantifying the costs and benefits of aviation liberalization not only to the airlines and to home country passengers, but also the potential economic benefits from increased inbound tourism.

Specifically, there is need for IGAD Member States to establish bilateral air services agreements with key and emerging global tourist sources markets to facilitate direct flights and to review existing arrangements.

To realise this goal, it would be necessary for the Member States to adopt an 'open-skies policy' as envisaged under the PIDA Priority Action Plan (PAP) for the transport sector¹⁹ and the AU Agenda 2063 Single Air Transport Market for Africa (SATMA). This has worked for other regions like the EU, Schengen, Association of Southeast Asian Nations (ASEAN), South Pacific Island States, the Caribbean Community, and members of the Latin American Civil Aviation

¹⁹ See AU Commission/ AfDB /ECA, 2010:18

Commission. Nonetheless, it is worth noting that, in order to maximise the benefits of such a strategy, IGAD Member States should be encouraged to establish world-class air transport infrastructure.

3. Promote uptake of the IGAD Protocol of Free Movement of Persons

As earlier indicated, free movement of people across the IGAD region represents a powerful boost to economic growth and skills development when people can travel with ease for business, tourism or education. Approved by in 2020, the IGAD Protocol on the Free Movement of Persons calls upon Member States to deepen regional integration through, among other things, creating a regime of free movement of persons, right of residence, and right of establishment. Today, five IGAD countries have signed the Protocol, namely the Republic of Sudan, the Republic of South Sudan, the Federal Republic of Somalia, and the Federal Democratic Republic of Ethiopia, and the Republic of Uganda. Efforts will be dedicated towards getting the rest of Member States sign the Protocol and ensure it is implemented across the region.

4. Ensure safe passage across all trans frontier highways

Road transport forms a key sector in promoting regional tourism. However, within the IGAD region, this aspect is limited by safety concerns, border crossing restrictions and lack of non-enabling insurance policies. These areas will be addressed in this new STMP. In this regard, the region will formulate a “Regional Protocol for Safe and Secure Trans Frontier Highways” stipulating the expectations for a safe and secure highways. The Tool will then be used to identify regional cross-border highways that are safe. Such highways will then be communicated through a regional portal as a guide for cross-border road travellers.

5. Promote intra-regional trade in tourism goods and services

It is worth noting that besides labour, supply of goods and services for the tourism sector in the IGAD region is largely sourced outside the region. In the spirit of regional integration and promotion of mutual interests, the region will seek to increase movement of goods and services.

To start with, mapping of opportunities in and limitations for intra-regional tourism value chains will be undertaken. This will allow identification of interventions, both policy and non-policy, necessary to deepen intra-regional tourism value chains.

A supply directory will be established identifying the existing regional suppliers for tourism products from whom players in the sector within the region can source.



PRIORITY AREA 7: INFORMATION, KNOWLEDGE AND EXPERIENCE SHARING

Introduction

Timely availability of data and information for decision-making has been a key challenge facing the tourism sector in most of developing countries. The IGAD region is not exceptional in this matter. In this respect and given the varied levels of tourism development within the IGAD Member States, it will be essential that Member States share information, knowledge and experience with one another. To achieve this, the following actions will be pursued

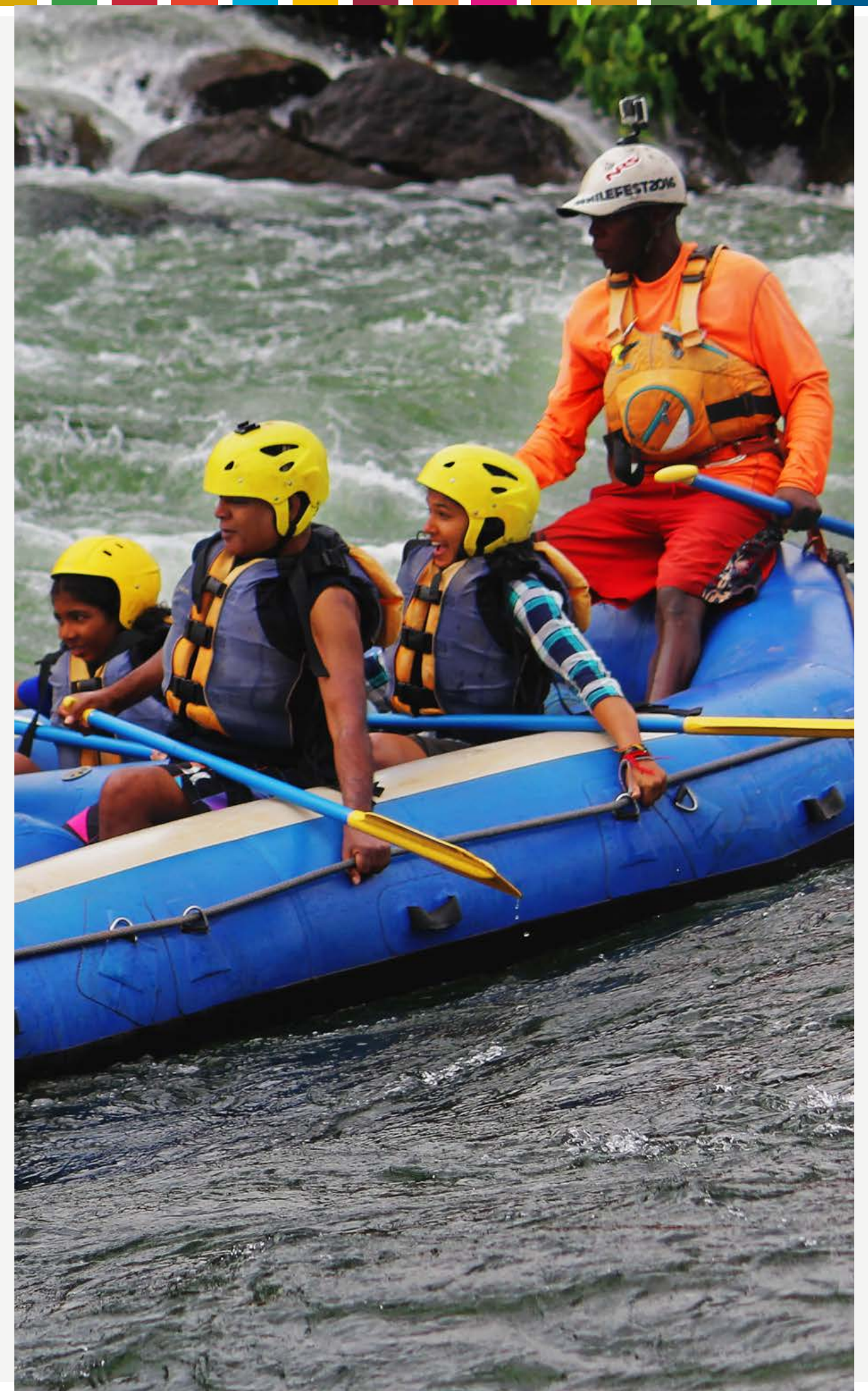
Strategic Objective

To facilitate sharing of information, knowledge and experiences among IGAD Members States for tourism development

Strategic Actions

- 1. Establish an integrated tourism statistics system at regional level**
To ensure collation and analysis of relevant tourism statistics, it is essential that an integrated and harmonized system is developed to provide policy and decision makers with comprehensive, consistent and timely data. This will be aligned with the *IGAD Regional Strategy 2021-2025*²⁰
- 2. Establish a regional framework for sharing experiences in tourism development**
Noting the varied levels of tourism development across the IGAD Member States, it is essential for countries to share experiences with one another. Towards this end, themed annual forums shall be instituted under the leadership of IGAD Secretariat to ensure that Member States get opportunities to share their lessons in tourism development. This will involve public sector, private sector, civil society and the research and academia.

²⁰ <https://igad.igadportal.org/documents/27-statistics-strategy-cover>



PRIORITY AREA 8:

FORMULATE A TOURISM PLANNING AND DEVELOPMENT GUIDE

Introduction

To guide planning and development of a competitive and sustainable tourism across the IGAD Member States, there is need for a harmonized approach. This is essential for a number of reasons including harmonize tourism planning and development approaches in the IGAD region, providing tourism stakeholders in Member States and at the IGAD level, with a framework for monitoring tourism development and measuring outcomes and ultimately, capacity-building tourism stakeholders in the Member States in planning and developing sustainable and competitive tourism, and guiding member states in integrating the STMP into national level tourism policies and planning. In this regard, a Tourism Development Guidebook for the IGAD region will be prepared and availed to the IGAD Member States. The Guide will take a comprehensive approach to planning and developing a tourism sector that is both globally competitive and sustainable. This guide will cover a wide range of topics relating to its planning, development, management and sustainability.

Strategic Objective

Provide the IGAD region with a tourism development toolkit to enable harmonized planning and development.

Key strategic focus areas of the guide

The guide will include,

1. DRIVERS FOR A GLOBALLY COMPETITIVE NATIONAL TOURISM BRAND including,

- i. Quality and Diversified Tourism Product
- ii. Tourism Facilities and Services
- iii. Tourism Promotion and Marketing
- iv. Destination Accessibility and Support Infrastructure
- v. Tourism Human Resource Development

2. FACTORS FOR DEVELOPING SUSTAINABLE AND INCLUSIVE TOURISM.

These will be focused on the UNWTO 12 aims of sustainability in tourism²¹ as anchored in the UNWTO Statistical Framework for *Measuring the Sustainability of Tourism (MST)*²²

- i. Economic viability
- ii. Local prosperity
- iii. Employment, decent work and human capacity
- iv. Social equity
- v. Visitor fulfilment
- vi. Local control
- vii. Community wellbeing
- viii. Cultural richness
- ix. Physical integrity
- x. Biological diversity
- xi. Resource efficiency
- xii. Environmental purity.

3. ENABLERS FOR COMPETITIVE AND SUSTAINABLE TOURISM DEVELOPMENT

- i. Tourism policy, regulatory and institutional framework
- ii. Research and knowledge management
- iii. A framework for financing tourism development
- iv. Coordination mechanism
- v. Monitoring and evaluation framework

²¹ <https://www.globalnature.org/bausteine.net/f/6955/MakingTourismMoreSustainablePart1.pdf?fd=2>

²² <https://www.unwto.org/tourism-statistics/measuring-sustainability-tourism>

PRIORITY AREA 9: TOURISM DEVELOPMENT FINANCING

Introduction

The need for a sustainable funding mechanism for the sector cannot be gainsaid. This is so in view of the need to mobilize funding to support the different programmes necessary for the development of the tourism sector including product development, destination marketing and promotion, development of industry standards, experience sharing and most importantly, human resource development and training. In this regard, a resource mobilization framework with the necessary strategies will be formulated to ensure sustainable funding for the joint tourism development programmes.

Strategic Objective:

To Ensure sustainable financing of the IGAD STMP 2024-2034

Strategic Actions

1. Estimate the resource requirements for each STMP 2024-2034 Priority Programmes

A programme-based financing model will be utilised in the implementation of this STMP. This will involve isolating all the priority activities of the STMP and determining the financing requirements of each activity/programme

2. Map potential sources of financing for each priority areas

Noting that different programme activities may attract interest from diverse sources of financing, potential sources will be mapped and profiled, identifying the approaches for reaching each identified financing source. Such sources would include development partners, Member States, private sector, and well-wishers, including charitable organisations.

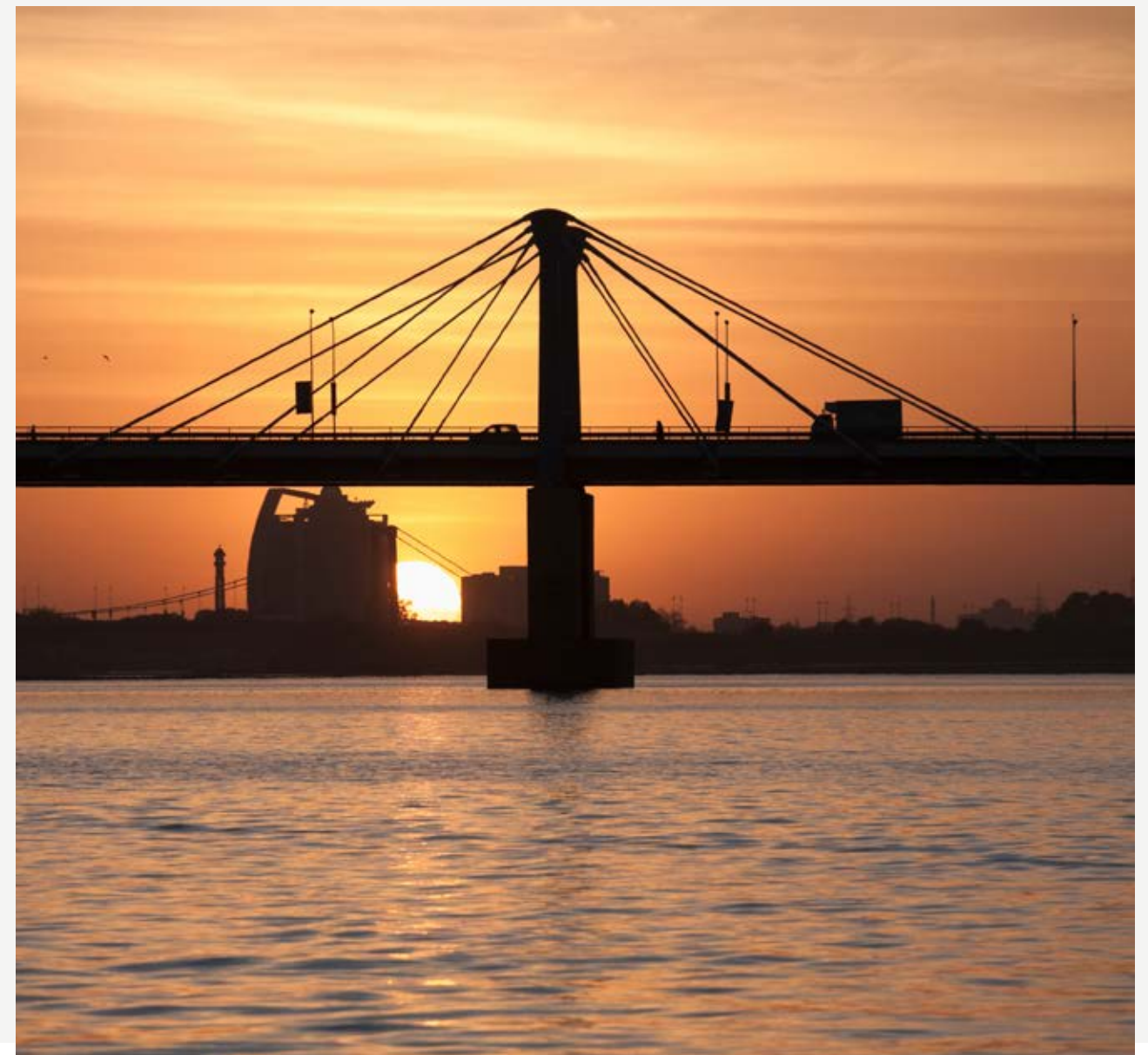
From the Member States, some considerations, among others, could include:

- i. **Member States Contributions:** Allocating a percentage of their tourism development budgets to the IGAD Secretariat for the implementation of the Master Plan activities
- ii. **Joint Funding for Exhibitions:** Member States offering a finance contribution for IGAD to exhibit as one destination at international meetings and tourism exhibitions.
- iii. **Block Fundraising Initiatives:** Fundraising initiatives undertaken as a block to funding agencies like the World Bank etc

- iv. **Creation of Regional Industry-Specific Bodies:** Establishing organizations like the IGAD Hotel Association, to which Member States industry associations can subscribe.
- v. **Joint Marketing and Convention Bidding:** IGAD undertaking joint marketing and bidding for international conventions to benefit member countries. Funding would go to the Secretariat to manage the conference bidding processes.

3. Implement resource mobilization strategies

The identified strategies and approaches will be implemented to ensure the mobilization of the required resources for each STMP programme/activity.





04

STMP
2024-2034
Implementation
Framework



4.1 INTRODUCTION

This Framework outlines the relevant actions to be undertaken within each identified Strategic Priority Area together with the means of verification using Objectively Verifiable Indicators (OVIs). The framework further indicates the institutions bearing primary responsibility and the timeframe within which the strategic actions should have been implemented.

The implementation timeline is divided into three phases: Phase 1 (1-3 years), Phase 2 (4-6 years), and Phase 3 (7-10 years). Such a phased approach will assist in prioritizing programmes and strategic actions, provide an indicative schedule of activities within the STMP implementation period, and establish timelines for both formative and summative evaluations.



4.2 STMP 2024-2034: IMPLEMENTATION FRAMEWORK

STRATEGIC OBJECTIVES	STRATEGIC ACTIONS	OBJECTIVELY VERIFIABLE INDICATORS (OVIS)	PRIMARY RESPONSIBILITY	TIME SCHEDULE AND TARGET: Key: A= 1-3 yrs / B= 4-6 yrs / C= 7-10 yrs			EST. BUDGET ('000 USD)
				A	B	C	
PRIORITY AREA 1: TRANS-BOUNDARY TOURIST PRODUCTS							
Develop integrated tourism products across the different IGAD Member Countries	Map potential flagship trans-boundary tourism products	An inventory of potential flagship transboundary tourism products across IGAD Member States	IGAD	100%			100
	Formulate product development plans for trans-boundary products	Product development plans for each of the identified trans-boundary tourism products are formulated	IGAD/NTOs of Neighbouring Member States	100%			100
	Implement flagship transborder tourist product development plans	Number of potential flagship transborder tourist products developed	NTOs of Neighbouring Member States	20%	40%	40%	50,000
PRIORITY AREA 2: REGIONAL TOURISM QUALITY STANDARDS							
Establish uniform quality standards for the tourism sector across the IGAD region to enhance service consistency, improve visitor experiences, and promote regional competitiveness.	Develop unified quality standards for the tourism industry	Unified quality standards for the tourism industry for IGAD region developed	IGAD Secretariat	100%			100
		Number of IGAD Member States using the unified quality standards for the tourism industry	Member States	3	6	8	8000
	Create a Regional Quality Standards Certification Programme	IGAD Regional Quality Standards Certification Programme is established	IGAD Secretariat	100%			100
		Regional Quality Standards Certification Programme is implemented	Member States	3	6	8	
PRIORITY AREA 3: TOURISM PROMOTION AND MARKETING							
Market and promote the IGAD Member States as competitive destinations for both regional and international visitors	Formulate a regional tourism marketing strategy	A regional tourism marketing strategy formulated	IGAD Secretariat	100%			100
	Pursue a unified promotional effort in the international marketplace	Joint tourism promotional programmes are designed for the international markets	IGAD Secretariat	100%			100
		Joint tourism promotional programmes for international markets are implemented	Member States	20%	40%	40%	
	Create a destination marketing strategy for the IGAD regional Market	A destination marketing strategy for the IGAD intra-regional market is developed for each Member State	IGAD Secretariat	100%			100
		Number of Member States implementing the Intra-regional Destination marketing strategy	Member States	4	6	8	8000
	Develop a Destination Management System and a Tourism Portal	A Destination Management System and a Tourism Portal for IGAD region is developed	IGAD Secretariat	100%			200

STRATEGIC OBJECTIVES	STRATEGIC ACTIONS	OBJECTIVELY VERIFIABLE INDICATORS (OVIS)	PRIMARY RESPONSIBILITY	TIME SCHEDULE AND TARGET: Key: A= 1-3 yrs / B= 4-6 yrs / C= 7-10 yrs			EST. BUDGET ('000 USD)
				A	B	C	
PRIORITY AREA 4: PROMOTING TOURISM INVESTMENT IN THE REGION							
Promote the IGAD region as an attractive investment destination for tourism investors	Prepare an Investment Promotion Guide for the IGAD region	A joint Tourism Investment Promotion Guide for the IGAD region is developed	IGAD Secretariat	100%			100
	Member States adapt the joint Tourism Investment Promotion Guide	Number of the IGAD Member States implementing the joint Tourism Investment Promotion Guides	Member States	4	6	8	8000
PRIORITY AREA 5: TOURISM HUMAN RESOURCE DEVELOPMENT							
Overall Strategic Objective: To guarantee that each IGAD Member State has adequate and qualified human resource at all levels of the tourism sector including business operations and management, destination policy, development and management, and research and academia.							
Sub-objective 1: Bridge the short-term HR needs for the tourism sector.	Formulate and implement a short-term HR Development Strategy for the tourism industry IGAD Region	A short-term HR Development Strategy for the tourism industry IGAD Region is developed	IGAD Secretariat	100%			100
	Promote intra-regional labour mobility to bridge the short-term HR deficit in the Member countries	The short-term HR Development Strategy for the tourism industry in the IGAD Region is implemented in each Member State	Member States	100%			8000
	Establish intra-regional apprenticeship programme	A framework for intra-regional labour mobility is designed	IGAD Secretariat	100%			100
		Number of Member States involved in intra-regional labour mobility	Member States	2	6	8	
Sub-objective 2: Develop Sustainable supply of globally competitive human resource for the tourism sector in IGAD	Harmonize tourism training and certification amongst IGAD Member States	Intra-regional apprenticeship programme is designed	IGAD Secretariat	100%			100
		Number of IGAD Member States participating in the Intra-regional apprenticeship programme	Member States	4	6	8	
	Establishing centres of excellence in tourism training across the region	IGAD minimum curriculum requirements for different careers in hospitality and tourism designed	IGAD Secretariat	100%			100
		Percentage of institutions adopting the IGAD minimum curriculum requirements for different careers in hospitality and tourism	Member States	10%	40%	100%	
	Criteria for Centres of Excellence in tourism training developed for the IGAD region	IGAD Secretariat	100%				100
	Number of IGAD Member States with at least one centre of excellence in tourism training	Member States	3	6	8		1500

STRATEGIC OBJECTIVES	STRATEGIC ACTIONS	OBJECTIVELY VERIFIABLE INDICATORS (OVIS)	PRIMARY RESPONSIBILITY	TIME SCHEDULE AND TARGET: Key: A= 1-3 yrs / B= 4-6 yrs / C= 7-10 yrs			EST. BUDGET ('000 USD)	
				A	B	C		
				PRIORITY AREA 6: INTRA-REGIONAL MOVEMENT OF PERSONS, GOODS AND SERVICES IN THE TOURISM SECTOR				
To facilitate unhindered movement of persons, goods and services within the tourism sector within the IGAD region.	Adopt favourable visa regimes	Visa regimes in each Member State reviewed and recommendations for improving Visa Openness provided	IGAD Secretariat	100%			100	
		Average percentage change in the Visa Openness Index in each IGAD Member States	Member States	25%	25%	25%		
	Review and align air transport policies with tourism development strategy	Air transport policies for each IGAD Member States are reviewed and recommendations for alignment with national and regional tourism development plan	IGAD Secretariat	100%				100
		Percentage of recommendations for aligning air transport policies with national and regional tourism development plans implemented	Member States	10%	50%	100%		
	Promote uptake of the IGAD Protocol of Free Movement of Persons	Number of IGAD Member States who have signed the IGAD Protocol of Free Movement of Persons	Member States	75%	100%		8000	
	Ensure safe passage across all trans frontier highways	IGAD Protocol for Safe and Secure Trans Frontier Highways developed	IGAD Secretariat	100%			100	
		Percentage of IGAD regional Transboundary Highways classified as Safe and Secure.	Member States	50%	100%		1000	
	Promote intra-regional trade in goods and services required for the tourism sector across its value chain.	Value Chain-based mapping of opportunities for intra-regional trade in tourism goods is undertaken and a supply directory established	IGAD Secretariat	100%			200	
	Percentage of change in intra-regional trade in goods and services for the tourism sector across the IGAD region	Member States	25%	25%	75%			

STRATEGIC OBJECTIVES	STRATEGIC ACTIONS	OBJECTIVELY VERIFIABLE INDICATORS (OVIS)	PRIMARY RESPONSIBILITY	TIME SCHEDULE AND TARGET: Key: A= 1-3 yrs / B= 4-6 yrs / C= 7-10 yrs			EST. BUDGET ('000 USD)
				A	B	C	
PRIORITY AREA 7: INFORMATION, KNOWLEDGE AND EXPERIENCE SHARING							
To facilitate sharing of information, knowledge and experiences among IGAD Members States for tourism development	Establish an integrated tourism statistics system at regional level	An integrated tourism statistics system for the IGAD region is formulated	IGAD Secretariat	100%			200
		Number of Member States participating in the joint tourism statistics system	Member States	3	6	8	
	Establish a regional framework for sharing experiences in tourism development	A regional framework for sharing experiences in tourism development is formulated	IGAD Secretariat	100%			500
		Number of IGAD Member States participating in regional forums/events for sharing experiences in tourism development.	Member States	6	8	8	
PRIORITY AREA 8: FORMULATE A TOURISM DEVELOPMENT GUIDE							
Strategic Objective: Provide the IGAD region with a tourism development toolkit to enable harmonized planning and development.	Develop a tourism development guide to enable harmonized planning and development of the sector.	A Regional Tourism Development Guide for IGAD is developed	IGAD Secretariat	100%			100
		Number of national tourism development strategies/plans aligned with the Regional Tourism Development Guide	Member States	3	6	8	
PRIORITY AREA 9: TOURISM DEVELOPMENT FINANCING							
Ensure sustainable financing of the IGAD STMP 2024-2034	Estimate the resource requirements for each STMP 2024-2034 Priority Programmes	Programme-based resource requirements for each STMP 2024-2034 Priority Programme is established	IGAD Secretariat	100%			50
	Map potential sources of financing for each priority areas	A resource mobilization/financing model for the IGAD STMP 2024-2034 is formulated	IGAD Secretariat	100%			
	Implement resource mobilization strategies	Percentage of required resources for STMP 2024-2034 programmes mobilized in line with particular programme timelines	IGAD Secretariat / Member States	100%	100%	100%	1000





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Monitoring and Evaluation Framework



5.1 INTRODUCTION

The monitoring and evaluation (M&E) framework for the STMP 2024-2034 is aimed at reporting on the implementation progress of the strategic action programmes based on a set of stated targets, goals and objectives and indicators as provided in the Implementation Matrix.

The supervision of the design, implementation and monitoring and evaluation of the STMP 2024-2034 will be undertaken at two levels: IGAD Secretariat level and national level. The Member States will be responsible for implementation of national-level projects and those jointly between States. The IGAD Secretariat will oversee implementation of joint projects. The two levels will formulate an Implementation Plan of Action (IPoA) prepared in line with the proposed time lines. These individual IPoA will form monitoring and evaluation tools for each level.

The overall M&E Plan will involve termly evaluation that will be undertaken at the end of each of the three-year implementation cycles (end of year 3 and year 6). This will facilitate identifying lessons and relevant changes to inform implementation of the next phase. An end of term evaluation will be undertaken at the end of year 10 to assess the overall results of implementation of the STMP.

Table 5.1 below provides a summary of the Monitoring and Evaluation framework the STMP 2024-2034.

TABLE 5.1: STMP 2024-2034 Monitoring and Evaluation Plan

	NATURE OF M&E	TIME LINE	EXPECTED OUTPUT	RESPONSIBILITY
1	STMP Implementation Cycle Reviews	End of each implementation cycle (end of year 2027 and 2030)	End of Implementation Cycle Evaluation report providing achievements, challenges, lessons learnt and plan for the next cycle.	NTOs and IGAD Secretariat
2	Final Evaluation	End of the STMP implementation Schedule (by end of year 2034)	Final STMP Evaluation report providing achievements realized, challenges faced, lessons learnt, and the way forward into the next planning cycle.	NTOs and IGAD Secretariat





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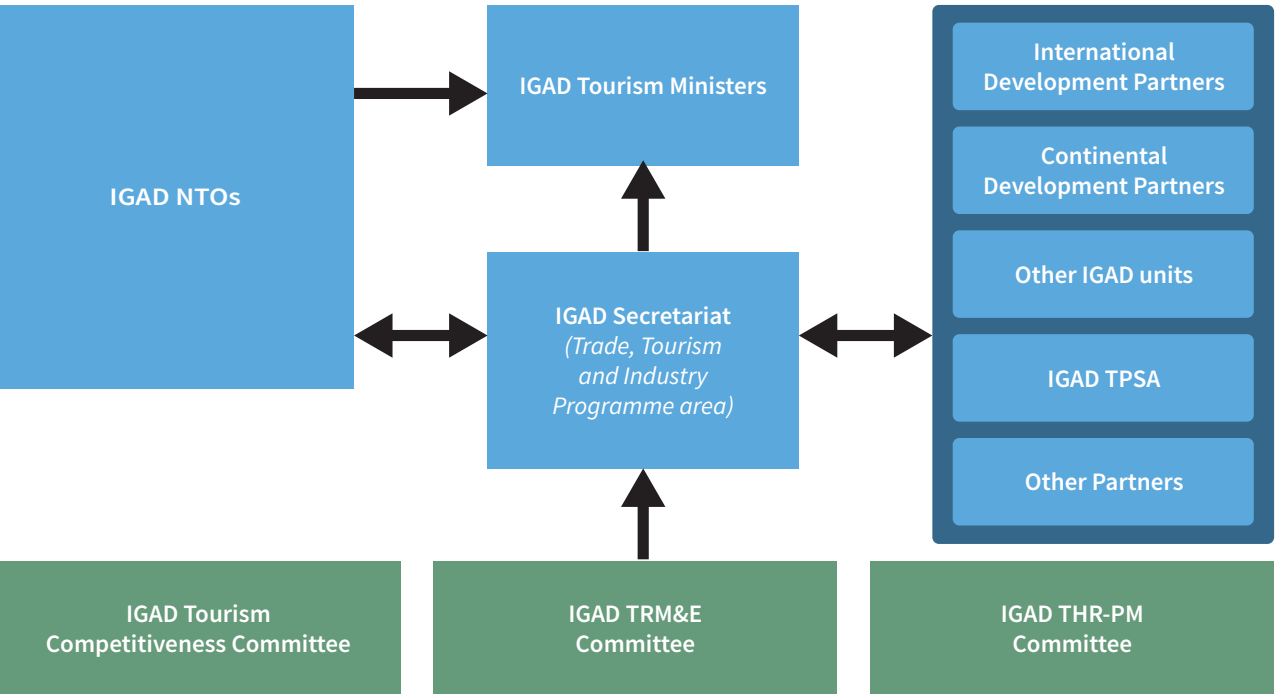
Institutional
arrangement
for the
implementation
of STMP
2024-2034



The implementation of this STMP shall involve regional and national level organs from both public sector and private sector. The STMP 2024-2034 implementation arrangement will be as follows:

1. *The Trade, Tourism and Industry programme area* of the IGAD Secretariat will spearhead implementation of the STMP
2. *The IGAD Tourism Ministers* to provide the policy framework and direction
3. *The IGAD NTOs* to serve as the executing body to implement and monitor the STMP at national level
4. *IGAD Tourism Private Sector Alliance (TPSA)* composed of representation from the tourism private sector associations in the Member States.
5. Three *STMP Implementation Committees* to implement specific STMP programmes:
 - a. *The IGAD Tourism Competitiveness Committee* responsible for the focus areas affecting competitiveness of IGAD Tourism
 - b. *The IGAD Tourism Resourcing, Monitoring and Evaluation Committee* with overall responsibility for securing financial resources to support the implementation of the programmes and projects of the STMP 2024-2034, and undertaking monitoring and evaluation of STMP implementation process.
 - c. *IGAD Tourism Human Resource & Professional Monitoring Committee (THR-PMC)* with overall mandate on professionalism within the IGAD Tourism Sector

FIGURE 6.1 STMP 2024-2034 Institutional Framework



Presented below is the description of the mandate of each of the key organs.

Trade, Tourism and Industry Programme Area of the IGAD Secretariat

The Trade, Tourism and Industry Programme Area of the IGAD Secretariat shall be established to spearhead implementation of the STMP. Specifically, this unit shall be responsible for

1. Establishing the three technical committees in consultation with Member States and relevant IGAD organs.
2. Providing overall oversight for resource mobilization for regional priority tourism programmes
3. Disseminating and promoting STMP for ownership across Member States
4. Coordinating STMP implementation through the established framework within the IGAD structures
5. Overseeing the monitoring and evaluation mechanism
6. Lobbying the governments of Member States on policy dimensions of the STMP through the *IGAD Council of Tourism Ministers*
7. Implementing the STMP programmes specified for IGAD as the regional body

IGAD Sectoral Council of Tourism Ministers

The *Sectoral Council of Tourism Ministers* shall serve as the policy-making body of IGAD on tourism matters. The Council shall consist of the Ministers responsible for tourism of each Member State. The Sectoral Council shall be responsible for

1. Providing policy direction and leadership on the overall implementation of the STMP
2. Lobbying Member State governments to ensure the implementation of the STMP
3. Liaising with IGAD Secretariat on the coordination and oversight of STMP implementation

The National Tourist Organisations (NTOs)

The NTOs in Member States shall be responsible for

1. Aligning national tourism policies and plans with the regional STMP
2. Executing national government's responsibilities for the control, direction and promotion of tourism in line with the STMP.
3. Coordinating the different activities of all the bodies involved in implementation of the STMP at the national level.
4. Disseminating and promoting the STMP at the national level
5. Providing national-level support to the other STMP implementation committees in executing their mandates.



The IGAD Tourism Competitiveness Committee

This Committee shall be established and be responsible for the focus areas affecting competitiveness of IGAD Tourism. Specifically, it shall responsible for the following:

1. Planning, designing and implementing the programmes and projects related to the development of a more conducive tourism investment framework, raising the service skills and quality of tourism human resources, promoting destination and product diversification, raising destination and product quality, and moving to highly focused thematic and experiential destination and product marketing and promotions approaches.
2. Planning, designing and implementing the programmes and projects related to improving and expanding connectivity infrastructure, facilitating cross border travel, and investment in destination infrastructure development
3. Cooperating with the IGAD Tourism Resourcing, Monitoring and Evaluation Committee to ensure timely and successful undertaking of M&E for the relevant STMP projects.

The IGAD Tourism Resourcing, Monitoring and Evaluation Committee

This Committee shall be responsible for:

1. Securing financial resources to support the implementation of the programmes and projects of the STMP 2024-2034
2. Monitoring and evaluation of STMP implementation including design of M&E frameworks and tools
3. Reporting the progress of STMP implementation to the IGAD NTOS and Tourism Ministers with assistance of the IGAD Secretariat

IGAD Tourism Human Resource and Professional Development Monitoring Committee (THRPDMC)

The THRPDMC shall be established with overall mandate on professionalism within the IGAD Tourism Sector and shall have the following responsibilities,

1. To develop the Minimum Curriculum Standards (MCS) and the Common Competency Standards for Tourism Professionals (CCSTP) in the IGAD region,
2. Promote, update, maintain and monitor the uptake of MCS and CCSTP in the IGAD region.
3. Develop the Minimum Standards for Tourism Training Centres of Excellence
4. Create a framework for Mutual Recognition Arrangement (MRA) on Tourism Professionals within the IGAD region
5. Facilitate the exchange of information concerning assessment procedures, criteria, systems, manuals and publications relating to this Arrangement;

6. Develop a framework to facilitate mobility of tourism professionals
7. Provide a platform for exchange of information on best practices in training for tourism professionals and for cooperation and capacity building across IGAD Member States.

The THR-PM Committee shall be composed of representatives of IGAD NTOs and appointed representatives from the National Tourism Professional Boards (NTPBs).

IGAD Tourism Private Sector Alliance (TPSA)

This body will include representatives from the tourism private sector associations in Member States. The key objectives of TPSA will be to:

1. Provide a unified voice for the regional tourism private sector on matters pertaining to regional tourism development, including engagement with the regional bodies, national level public sector and international community.
2. Enhance ethics and standards in the regional tourism industry.
3. Provide a forum for the industry to self-assess its the progress in implementing the STMP.
4. Lobby and constructively engage with governments and other entities on issues critical to the industry.
5. Provide a platform for the regional tourism private sector to share experiences.

NOTE:

To ensure convergence of approach and cross fertilisation of ideas and solutions, the structure of the committees should reflect the participation of convergence partner organisations in the public and private sector rather than only the NTOs. For example, under the IGAD Tourism Competitiveness Committee:

- *Transportation and infrastructure agencies of the Member States and development partners as well as private sector associations shall be encouraged to participate in the design and implementation are encouraged to participate in the discussion of programmes to enhance destination connectivity and infrastructure;*
- *Participation of the private sector through TPSA and other organisations need to be facilitated towards enhancing cooperation programmes relating to product development and marketing; and*
- *Participation of the bilateral and multi-lateral development partners and IGAD dialogue partners need to be encouraged by the IGAD Tourism Resourcing, and Monitoring and Evaluation Committee*



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APPENDIX LIST OF ORGANIZATIONS CONSULTED

REPUBLIC OF DJIBOUTI

- Directorate of Economy and Planning
- Office of the Permanent Secretary, Ministry of Commerce and Tourism
- University of Djibouti
- Air Djibouti
- Civil Aviation Authority
- Kempinski Djibouti hotel
- Young Civilian Sailors' Association
- National Tourism Agency
- Ministry of Economy and Finance in-charge of Industry

FEDERAL DEMOCRATIC REPUBLIC OF ETHIOPIA

- State Minister, Ministry of Tourism
- Oromia Tourism Commission
- Ministry of Tourism
- MICE Development Department, Ministry of Tourism
- Ethiopia Tourism Fund
- Ethiopia Tour Operators Association
- Ethiopia Tourist Guides Professional Association
- Addis Ababa Hotel & Tourism Professionals Association
- Hotel Management Association
- Capital Hotel, Addis Ababa
- Adwa Victory Memorial Museum
- Radisson Blu Hotel, Addis Ababa
- Ethiopia Investment Holdings

REPUBLIC OF UGANDA

- Uganda Tourism Board
- Makerere University
- Tourism Research and Development Centre
- ITER Holidays
- Uganda Association of Travel Agents
- Trade and Tourism at National Planning Authority
- Uganda Museums and Monuments
- Uganda Tourism Association

- Uganda Wildlife Association
- Ministry Tourism Wildlife and Antiquities
- Department of Tourism, Ministry Tourism Wildlife and Antiquities
- Quality Assurance, Ministry Tourism Wildlife and Antiquities
- Wildlife Conservation Department, Ministry Tourism Wildlife and Antiquities
- Uganda Hotel Owners Association
- Uganda Hotel and Tourism Training Institute

REPUBLIC OF SOUTH SUDAN

- Directorate of Tourism, Ministry of Tourism and Wildlife
- Juba City Tourism
- Directorate of Hotels, Ministry of Tourism and Wildlife
- Marketing and Public Relations, Ministry of Tourism and Wildlife
- South Sudan Trade and Investments
- Trade, Economy & Production
- Hotel and Catering Association of Southern Sudan

REPUBLIC OF KENYA

- Kenya Tourism Federation
- Kenya Association of Tour Operators (KATO)
- Kenya Utalii College
- Kenya Tourism Board
- Tourism Research Institute
- Green Africa
- Kenya Coast Tourist Association
- Kenya Association Hotel keepers and Caterers
- Tourism Professionals Association
- University of Kabianga
- Sustainable Travel & Tourism Africa (STTA)
- Tourism Investment and Financing, Ministry of Tourism and Wildlife
- Research and data coordination, Ministry of Tourism and Wildlife, State Department for Tourism
- Tourism Policy Formulation, State Department of Tourism
- Greta University
- Murang'a University of Technology



REPUBLIC OF SOMALIA

IGAD SECRETARIAT

Director, *Economic* Cooperation and Regional *Integration Division*









