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Promoting the Culture Sector through Job Creation and Small Enterprise Development in SADC Countries:

The Ethno-tourism Industry

by

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Foreword

This research report is part of a set of five studies commissioned by the ILO in the framework of the project "Small enterprise development and job creation in the culture sector in the SADC region". This project was funded by the Ford Foundation and implemented by the InFocus Programme on Boosting Employment through Small EnterprisE Development (IFP/SEED). This project explores the possibility that the promotion of cultural entrepreneurship that harnesses local talents, skills and heritage may be especially resistant to the competitive pressures of globalization and may provide innovative possibilities for boosting incomes and generating quality employment in a sector that is normally overlooked by policy-makers or addressed with piecemeal and traditional approaches.

IFP/SEED's work in the area of Market Access is based on the premise that small enterprises can only grow and become competitive economic ventures when they have clear and well-developed channels for selling their outputs. The lack of adequate markets for the consumption of cultural goods and services is frequently identified as a major obstacle to the development of a truly vibrant and economically viable culture sector. This finding is highlighted repeatedly in these SADC region studies. The use of a value chain analysis, adapted to the culture sector, has been a particularly effective tool in these studies to identify strengths and weaknesses and help inform policy recommendations for bolstering the weaker "links" in this chain. The partnership forged between the Ford Foundation and the ILO for this project aims to marry the concerns of the Education, Media, Arts and Culture division of the Ford Foundation with the ILO's tools and approach for creating more and better jobs for men and women, in order to transform the culture sector into a sustainable form of job creation and income generation for developing countries.

Over the past 15-20 years, a majority of both developing and industrialized countries have initiated policies and programmes aimed at promoting the micro, small and medium enterprises in view of their important job creating potential. Support has been directed toward the major sectors of the economy, yet the economic potential of local artistic talents and a nation's cultural heritage has been largely untapped.

Although the presence of cultural activities may be perceived to be widespread, the development of the culture sector is rarely treated as a serious economic venture and few practitioners are actually able to make a living solely based upon their artistic trade. Few examples exist where government policies have given systematic and strategic business support to this sector. As a result, the culture sector in most developing countries plays a much more limited role – as a source of jobs, revenues and foreign exchange – than in industrialized countries where it contributes to a significant proportion of gross national product, indicating the need to promote what might be called "cultural entrepreneurship" among developing country artists. Furthermore, limited data exist and the true scale and dimension of local cultural activities are generally not well documented. In particular, few culture sector studies have been undertaken in Southern Africa.

For this reason, original field research was commissioned by the ILO to provide more detailed information and case studies of culture enterprises in the SADC region, with an eye toward providing policy prescriptions that would help ameliorate the major constraints preventing the growth of small enterprises. Five studies were conducted in the following cultural areas: crafts and visual arts; music; performing arts and dance; TV and film; and ethno-tourism. These five studies have been published as SEED Working Papers and readers may find various studies from this set to be of interest.

The present study assesses the ethno-tourism sector in the Southern African Developing Countries (SADC) region, especially regarding its potential for employment and wealth creation through small and medium enterprises (SMEs). Ethno-tourism is defined as a specialized type of cultural tourism and for the purposes of this study is defined as any excursion which focuses on the works of man rather than nature, and attempts to give the tourist an understanding of the lifestyles of local people. The ethno-tourism industry is a poorly developed industry because of its rapid recent growth and the entry of new inexperienced players. In the SADC region most aspects of the industry tend to be controlled by the tour operators, which is a feature of a developing industry. Domestic and regional tourists constitute an insignificant proportion of the consumers of the ethno-tourism product, while most consumers are targeted via international travel agents, international travel shows, the Internet or locally through retail sales outlets.

This study identifies the primary opportunities and strengths of ethno-tourism for the SADC region to include the fact that numbers of tourists are set to increase, and ethno-tourism is an increasingly popular form of specialized tourism. Nevertheless, it must be remembered that tourism is an extremely unpredictable and sensitive industry that is strongly influenced by visitor perceptions of safety in the host country as well as in neighbouring countries. It should also be mentioned that ethno-tourism operators often lack the business skills to ensure that they obtain a fair share of the tourist spending. The SADC region has an enormous diversity of ethnic groups and the region has a captive audience, drawn by other natural heritage features. The ethno-tourism sector is diverse, with many options for development (e.g. village tours, village accommodation, food, traditional dance and music etc). The ethno-tourism industry is dependent upon indigenous knowledge and values. Small-scale developments require very little capital investment and technological input. The industry can generate revenues rapidly and the cost of creating employment in this sector is lower than in other industries. Ethno-tourism is ideally suited to community–based tourism ventures and there is potential for smart partnerships with established entrepreneurs. Local ownership of ethno-tourism products is easy to achieve and provides a boost for the local economy. Small and medium-scale ethno-tourism products are usually booked and paid-for locally, thereby reducing the drain of capital from local countries and communities.

The lack of effective protection of the intellectual property rights of local artists is another crucial issue in this sector, and local practicing artists are generally unaware of the implications raised by their mastery of specific know-how and use of traditional practices and designs. In this regard, these studies have benefited from a collaboration with the Director, Mr. Guriqbal Singh Jaiya, Small and Medium-sized Enterprises Division of the World Intellectual Property Organization (WIPO), (http://www.wipo.int/sme). Comments on intellectual property related to ethno-tourism were added in the text, as well as Annexes 5 and 6.

Mr. Steven Bolnick, the author of this study, is an ethnographic tour operator in Victoria Falls, Zimbabwe and can be contacted by email at: untamed@mweb.co.zw. Ms. Anne Posthuma, Senior Specialist, Small Enterprise Development, IFP/SEED was the Project Coordinator responsible for backstopping this project. Ms. Avril Joffe was the Consultant and Project Advisor who oversaw the development of these studies. The internal reader for this study was Mr. Carlos Maldonado, Senior Specialist in Community-based Tourism in Latin America (REDTURS), IFP/SEED. It should be noted that the views presented in this document are those of the author and do not necessarily reflect the views of the ILO or its constituents.

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Executive summary

The aim of this study is to understand the workings and dynamics of the ethno-tourism sector in the Southern African Development Community (SADC), so as to increase its potential for employment and income creation through small and medium enterprises (SMEs).

Ethno-tourism is a specialized type of cultural tourism and for the purposes of this study is defined as *any excursion which focuses on the works of humans rather than nature, and attempts to give the tourist an understanding of the lifestyles of local people.* In the SADC region, the ethno-tourism industry is poorly developed because of its rapid recent growth and the entry of new, inexperienced players. It is important to recognize that growth trends in ethno-tourism are linked to trends in the tourism industry. The tourism industry has experienced tremendous growth in recent years and is predicted to continue growing rapidly. Cultural tourism has grown more rapidly than other sectors of the tourism industry. However, these optimistic trends must be tempered by awareness that tourism is an extremely sensitive industry that is rapidly influenced by outside forces.

The ethno-tourism sector makes the following important contributions on various levels to the countries and local communities in the SADC region, including: employment generation; income generation; strengthening of cultural values; bridging cultural and national boundaries; promoting micro, small and medium enterprise development; growth of ancillary industries; capacity building; community development; and empowerment of local and indigenous communities.

Several core aspects of ethno-tourism in the SADC region are discussed in this report. The main features can be highlighted as follows:

■ Ethno-tourism shows a continuum of economic scale of operation from non-commercial through small-scale with donor assistance and small-scale commercial to large-scale commercial ethno-tourism.

■ The abovementioned continuum is paralleled by a continuum of authenticity, with small-scale commercial ventures revolving around genuine functioning villages and the largest enterprises tending to be spectacular reconstructions and portrayals of traditional ethnic features.

■ Most aspects of the industry tend to be controlled by the tour operators.

■ Domestic and regional tourists constitute an insignificant proportion of the consumers of the ethno-tourism product. Most consumers of single-day products are more affluent international tourists older than 35 years. Younger, less affluent tourists are more likely to participate in home-stays in a traditional village or community.

■ Consumers are targeted via international travel agents, international travel shows, the Internet or locally through retail sales outlets.

Key legislative issues examined in this report are mentioned below:

■ Every country in the SADC region has a national tourism body responsible for enforcing tourism-related legislation, collecting taxes and marketing.

- Every country in the SADC region has legislative requirements for entry into the tourism industry. South Africa and Namibia are considering relaxing these entry requirements in order to facilitate historically underprivileged groups to enter the industry.

- South Africa and Namibia have expressed strong support for the tourism industry and have promised legislation that will facilitate historically underprivileged groups.

The main opportunities and strengths enjoyed by the ethno-tourism industry in the SADC region are summarized below:

- tourism numbers are predicted to increase;

- ethno-tourism is an increasingly popular form of specialized tourism;

- the SADC region has a huge diversity of ethnic groups;

- the region has a captive audience, drawn by other natural heritage features;

- the ethno-tourism sector is diverse, with many options for development (e.g. village tours, village accommodation, food, traditional dance and music etc.);

- the industry is dependent upon indigenous knowledge and values;

- small-scale developments require very little capital investment and technological input;

- the industry can generate revenues rapidly;

- the cost of creating employment in this sector is lower than in other industries;

- ethno-tourism is ideally suited to community-based tourism ventures;

- there is potential for smart partnerships with established entrepreneurs;

- local ownership of ethno-tourism products is easy to achieve and provides a boost for the local economy;

- small- and medium-scale ethno-tourism products are usually booked and paid-for locally, thereby reducing the drain of capital from local countries and communities.

The following threats and weaknesses in the ethno-tourism industry in the SADC region must be borne in mind when formulating policy and interventions to support this industry:

- tourism is an extremely unpredictable and sensitive industry; it is strongly influenced by visitor perceptions of safety in the host country as well as in neighbouring countries;

- ethno-tourism operators often lack the business skills to ensure that they obtain a fair share of the tourist spending;

- players in the delivery of ethno-tourism products often lack communication and hospitality skills;

- players have inadequate market awareness;

- tour operators exploit villagers;

- the development of a product often occurs without adequate skill transfer;

- legislative instruments often inhibit the growth of the industry at present;

- the development of ethno-tourism may conflict with other livelihood activities of the local community;

- the intellectual property of local indigenous communities runs the risk of being exploited unfairly;

- foreign companies dominate the small, individual and community-based actors in this industry;

- cultural stereotyping and sensationalism are frequently practised;

- ethno-tourism often provides a sporadic source of income;

- there is a lack of reliable statistics on this industry at the local and regional level.

Based on the findings in this research report, the following interventions to promote the ethno-tourism sector are proposed:

- provide hospitality training;

- provide business skills training;

- relax legislative entry requirements;

- increase and refine marketing strategies and skills;

- develop a regional ethno-tourism route;

- encourage inclusion of value-added products;

- facilitate regional networking;

- develop capacity in ideally situated communities.

1. Introduction[1]

1.1 Background

The focus of this research is the cultural and creative industries in the South African Development Community (SADC), with the aim of understanding the workings and dynamics of the sector so as to increase its potential for employment and wealth creation through the development of small and medium enterprises (SMEs). It has been estimated that SMEs represent over 90 per cent of enterprises in most countries, worldwide. They are the driving force behind a large number of innovations and contribute to the growth of the national economy through employment creation, investments and exports. Despite the importance of SMEs for the vitality of the economy and the potential offered by the intellectual property (IP) system for enhancing SMEs competitiveness, SMEs often underutilize the IP system,[2] as this report shows.

This project considers five cultural sectors: (i) performing arts and dance; (ii) visual arts and crafts; (iii) film and TV; (iv) music; and (v) ethno-tourism. This study deals specifically with the ethno-tourism sector in the SADC region.

The ethno-tourism sector has existed for many years in the subregion – for example, the "Craft Village" in Victoria Falls has been functioning for the past 34 years. However, as a result of the general increase in tourist travel in more recent years and particularly the increase in specialized tourism, ethno-tourism is currently experiencing a surge in interest both from entrepreneurs supplying the product and tourist demand for it. Political change in southern Africa has also made the SADC countries more accessible and attractive to tourists and has thus encouraged tourist growth in the region. Although a historically old sector, it is a poorly developed industry because of rapid recent growth and the entry of new, inexperienced players.

Ethno-tourism plays an important role in preserving cultural values and identifying traditions. It also provides employment and education. In the SADC region ethno-tourism takes several distinct forms. These are: (i) the tours to traditional villages that enhance the subsistence economy of those operating the tour; (ii) more formalized tours to genuine villages and into townships, organized by tour operators and operated on a profit basis; and (iii) reconstructed villages.

1.2 Definition

The definition of "the creative industries" adopted by the United Kingdom's creative industries task force is "… those activities which have their origin in individual

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[1] The ILO would like to acknowledge the collaboration of the World Intellectual Property Organization (WIPO) in providing comments to this text, as well as adding Annexes 4 and 5, that provide detailed information concerning intellectual property (IP) considerations and implications related to the ethno-tourism sector in this report.

[2] WIPO's programme of activities for SMEs aims to encourage a more effective use of the intellectual property system by SMEs worldwide. The programme seeks to raise awareness of the relevance of intellectual property for small business and promotes initiatives to make the IP system more accessible, less cumbersome and more affordable for SMEs. See Annexes 5 and 6 of this report for a more detailed discussion of these issues. Also visit http://www.wipo.int/sme/en/index.html for more information on WIPO and SMEs.

creativity, skill and talent, and which have a potential for wealth and job creation through the generation and exploitation of intellectual property". In addition to the more readily recognized "creative industries" (performing arts, for example), this definition included broader cultural and closely related sectors such as heritage, museums, galleries and tourism. The definition is not entirely satisfactory because: (i) there is no consensus about the definition of heritage; and (ii) tourism is not always cultural nor is its economic base generally dependent upon the exploitation of intellectual property. Box 1 looks at how traditional know-how or goods can be protected by a "trademark" of geographical indications to help maintain the economic value of local products.

The issue is further complicated because even within the tourism industry, terms describing several distinct activities are regularly conflated. The sector under consideration in this study is ethno-tourism which is regularly interchanged with other descriptors such as "eco-tourism", "cultural-tourism", "community-based tourism", "heritage tourism", "pro-poor tourism" and "sustainable tourism".

For the purposes of this study, these terms are understood in the following context:

– *Eco-tourism* is "responsible travel to natural areas that conserves the environment and sustains the well-being of local people".[3] Note that this definition does not specifically refer to any interaction with local people. It merely requires that the travel must contribute to the well-being of the local population. Eco-tourism is therefore not ethno-tourism.

– *Community-based tourism* is any tourism activity that is operated partially or totally by a local community and which benefits that community. This activity need not be cultural in nature.

> **Key issue:** Community-based tourism is an extremely important area to consider in terms of potential for employment creation and income generation as well as the formation of SMEs, however it does not fall within the ambit of this study. It is a sector that urgently requires further study. In southern Africa, in particular, many impoverished communities have tenure over resources that have enormous tourism potential, but do not have the other ingredients (skills, finance, marketing, etc.) with which to develop this potential.

– *Pro-poor tourism* is defined as tourism that generates net benefits for the poor. These benefits may be economic but they may also be social, environmental or cultural. Pro-poor tourism does not refer specifically to cultural or ethnic tourism.

– *Cultural tourism* is a broad term encompassing ethno-tourism, anthropological tourism, food and drink, historical tourism, arts-festival tourism, museums and heritage sites. Cultural tourism is not a new concept. According to the literature, as far back as the 16th century the sons of nobility were sent on European tours to experience the remains of classical antiquity. This became so widespread that by the 18th century this traditional cultural tourism had become known as the Grand Tour.[4]

The NWHO points out that cultural and natural heritage often overlap; issues relevant to one type of tourism can be relevant to another.[5] They define "Cultural

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[3] Statement on the United Nations International Year of Ecotourism, adopted by the Board of Directors and advisors of the International Ecotourism Society (TIES), 6 Jan. 2001.

[4] *Icomos Newsletter*, No. 6, 1996.

[5] The Nordic World Heritage Office. 1999. "Sustainable tourism and cultural heritage".

Heritage Tourism" as "travel concerned with experiencing cultural environments, including landscapes, the visual and performing arts, and special lifestyles, values, traditions and events".

– *Anthropological tourism* focuses on vanishing lifestyles that lie within the living memory of various indigenous groups. Anthropological tourism may be considered to be ethno-tourism. For example, in Namibia and South Africa, some tourism focuses on the lifestyle of the San people ("the Bushmen"). Because this lifestyle is vanishing, such tourism could be classified as "anthropological tourism" but also clearly falls within the definition of "ethno-tourism". The same can be said for tourism that focuses upon a past era of an indigenous culture, such as the numerous establishments that portray Zulu life as it was in the 1800s.

– *Historical tourism* focuses on the history of a society and may involve tours of museums, churches, monuments or heritage sites. It is often a very narrowly defined niche market. An excellent example of this is the so-called "battle-field tour" offered in Kwazulu-Natal.

– *Ethno-tourism:* This is a narrow term describing any excursion, which focuses on the works of humans rather than nature, and attempts to give the tourist an understanding of the lifestyles of local people. This has also been referred to as "indigenous tourism".[6] The unique local or national dishes and drinks of an area are often a defining expression of national or local culture.[7] Food and drink can form the substance of a dedicated form of tourism (e.g. the Oktoberfest in Germany) or more often it can be an important component of ethno-tourism. In this study, food and drink are considered a component of ethno-tourism.

> **Key issue:** Cultural or arts festivals clearly exhibit the overlap that exists between the different sectors included in this study, for example, the Grahamstown Arts Festival, the Harare International Festival of the Arts (HIFA), the Livingstone Festival, music festivals. These are conspicuous products of the creative sector and generate employment and income but they are also powerful magnets for tourists and, therefore, generate additional employment for those involved in the tourism and related sectors.

1.3   Methodology

The research methodology used in this study included face-to-face interviews, telephone or email interviews, web site and literature searches. Interviews were conducted with players at all stages of the creation of the cultural tourism product. The information obtained in this manner was analysed using the Landry Value Chain Model as described in section 2. This document provides an overview of the status of the cultural tourism sector in the SADC countries and offers some suggestions for enhancing the functioning of this sector in the study area.

1.4   Importance of the ethno-tourism sector

Ethno-tourism makes an important contribution in terms of income and employment generation and, in addition to these material inputs, contributes in more subtle, cultural ways.

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[6] Kingsley Holgate: personal communication.

[7] Kingsley Holgate: personal communication.

1.4.1 Cultural identity

Southern Africa has experienced rapid urbanization over a relatively short period of time. As a result, many youths are first-generation urban products. Urbanization has been accompanied by strong western influences. There has been no transition from the traditional lifestyle to the current urban lifestyle. Consequently cultural identities and values have been eroded. During interviews, a repeated theme was the need to rekindle interest in traditional culture, particularly amongst youth.

1.4.2 Other sectors in the creative industries

One of the strongest draw-cards to ethno-tourism products is traditional dance and song [8] and as a result this sector provides an important platform for musicians and dancers. The ethno-tourism sector is also inseparably connected with crafts and the visual arts. Almost all ethno-tourism ventures offer locally made or purchased crafts for sale as a value added attraction to tourists and an additional income generator for the ethno-tourism players. Box 1 summarizes how small-scale producers can use trademarks to protect cultural heritage products. Cultural theatre is also a tourist attraction, and is offered by at least one cultural village within the study area (Shangana Village, located five kilometres from Hazyview, in South Africa). [9]

Box 1. Trademarks

A trademark is a marketing tool used to support a company's claim that its products or services are authentic or distinctive compared with similar products or services. It usually consists of a distinctive design, word, or series of words, usually placed on the product label. This mark does not have to be new in itself, but its application to a specific type of product or service must be. As long as registered trademarks are periodically renewed protection is without time limit.

In a larger sense, trademarks promote initiative and enterprise worldwide by rewarding the owners of trademarks with recognition and financial profit. Trademark protection also hinders the efforts of unfair competitors, such as counterfeiters, who use similar distinctive signs to market inferior or different products or services. The system enables people with skill and enterprise to produce and market goods and services in the fairest possible conditions, thereby facilitating international trade.

Cultural heritage and trademarks

In many countries, such as the United States of America, Canada, Australia, Peru and South Africa, traditional handicrafts and artworks are highly marketable products that can be a lucrative source of income for traditional communities. Some customers are attracted by the ethnic origins of such products and may be willing to pay extra when they are convinced of their authenticity. Therefore, trademarks could have a useful role to play, especially those groups and communities that are concerned about reproductions falsely attributed to such groups or communities.

A kind of trademark that exists in the laws of some countries is the certification trademark. Certification marks can be used by small-scale producers to guarantee to customers that goods are genuine in some way or another. Certification marks indicate that the claims made by the traders have been authenticated by an organization independent of the individual or company making or selling the product. This is likely to be a regional trade association that has registered its own collective mark. In the United States, the Intertribal Agriculture Council licences use of its annually renewable 'Made by American Indians' mark for the promotion of agricultural or other Indian-made products that have been produced and/or processed by enrolled members of recognized tribes. Trademarks, labelling and also independent certification are used in India for marketing Darjeeling Tea, for example.

Traditional villages have also been used as the sets for film, documentary and advertising productions. The converse is also true in one highly visible example –

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[8] Kingsley Holgate: personal communication.

[9] www.shangana.co.za .

Shakaland – constructed as accurately as possible as the set for the movie "Shaka Zulu" and subsequently converted into one of the most successful ethno-tourism attractions in Africa.

1.4.3 A bridge across cultural divides

Ethno-tourism involves the display of a local indigenous culture and lifestyle to visitors from a different culture and lifestyle. This is achieved through personal interaction and, therefore, facilitates cross-cultural communication and education. As a result, it builds greater understanding and tolerance of different cultures.

In South Africa, for example, some ethno-tourism facilities exhibit different cultures from within the subregion. The employees at these re-created villages originate from their respective geographical region and come from different cultural and linguistic backgrounds. Such recreated multi-cultural facilities foster understanding and tolerance between different cultures from within the southern African subregion.

1.4.4 Acquisition of skills

Ethno-tourism focuses on local traditions and lifestyles and is dependent upon the inherited knowledge and skills of the local people. This sector, therefore, provides a unique opportunity for the local people to enter the mainstream tourism industry and obtain additional skills.

1.4.5 Income distribution

Income generated through ethno-tourism is often channelled into community development activities such as education, health, provision of water, or purchase of community grinding mills. Where community income is well managed, it can be very valuable and provide for community needs that would not otherwise be met.

1.4.6 Institutional capacity building

Where communities are involved, ethno-tourism can be an important focal point around which community cohesion may be enhanced and community organizations can be strengthened.

1.4.7 Access to information

Limited access to information is a common characteristic of poverty especially for those located in remote rural areas.[10] In several case studies, enhanced access to information together with increased communication and external contact were cited as positive benefits of tourism.

1.4.8 Local job creation

In many instances ethno-tourism creates employment at or close to people's homes. This minimizes domestic disruption and reduces urban migration.

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[10] C. Ashley; D. Roe; and H. Goodwin. 2001. *Pro-Poor Tourism Report No. 1*. ODI, IIED and CRT (London).

1.5 Global trends

The majority of tourists originate from the western world. Since they are the main consumers, interested in witnessing or learning about a culture different from their own, it follows that ethno-tourism occurs mainly in cultures that are not western. South America is conspicuous for its ethno-tourism venues, mainly because of its close proximity to a large and wealthy tourism market in North America.

Ethno-tourism can be expected to follow the general trends in the tourism industry. The World Tourism Organization (WTO) estimates that there were more than 635 million international travellers in 1998 and they spent more than US$439 billion. It predicts that international tourist arrivals will grow by an average of 4.3 per cent per annum until 2017. This growth has been predicted at a rate of 6 per cent per annum for countries in the southern hemisphere.[11] Over the same period, international receipts from these tourists are predicted to climb by 6.7 per cent per annum.[12] An ILO report notes, however, that the global economic downturn and a growing sense of insecurity among many travellers have led to a decline and job loss in the world tourism sector, especially since September 2001.[13] These trends indicate that international tourism levels may fluctuate more than may have been originally predicted, and highlight the need for specialized tourism, such as ethno-tourism in the SADC region, to adopt targeted marketing strategies to reach potential consumers.

Tourism in Africa offers good growth potential. According to the WTO, despite the fact that the volume of international tourism arrivals in Africa increased during the 1980s and 1990s, this still lags behind other regions of the world, accounting for only 3.57 per cent of the world's total in 1993, as seen in table 1.1. This relatively poor performance is due to factors such as lack of sufficient air and road transport infrastructure, and the necessary financial means to invest in the hospitality and accommodation sector, which reflects the difficulties faced in introducing tourism development policies (WTO, 1995:38).

The growth of international tourism in Africa is constrained by financial factors, such as the high cost of promoting African destinations overseas. A key strategy is to raise the average expenditure per tourist, but this requires high investments to upgrade infrastructure and facilities. The growth of tourism could help raise earnings – the contribution of tourism to Africa's total export earnings was 10.4 per cent in 1993.

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[11] ECOTOURISM. "Paradise gained, or paradise lost?" Panos media briefing No. 14 (Jan. 1995)

[12] www.ecotourism.org/textfiles/stats.txt

[13] See the publication "The Impact of the 2001-2002 Crisis on the Hotel and Tourism Industry", Jan. 2003, available from the ILO and on the ILO web site.

Table 1.1.   International tourist arrivals and receipts in Africa, 1970-93

Year	Arrivals (in thousands)	Change (in %)	Share of total world arrivals (in %)	Receipts (US$ millions)	Change (in %)	Share of total world receipts (in %)
1970	2 407	–	1.45	400	–	2.23
1975	4 654	93.35	2.09	1 127	181.75	2.77
1980	7 337	57.63	2.55	2 711	140.55	2.62
1985	9 706	32.29	2.94	2 601	–4.06	2.24
1986	9 341	–3.76	2.74	2 970	14.19	2.11
1987	9 833	5.27	2.68	3 797	27.85	2.20
1988	12 940	31.60	3.22	4 601	21.71	2.31
1989	13 770	6.41	3.19	4 454	–3.19	2.09
1990	14 993	8.88	3.27	5 238	17.60	2.03
1991	15 842	5.66	3.47	4 830	–7.79	1.85
1992	17 552	10.79	3.64	5 855	21.22	1.98
1993	17 875	1.84	3.57	6 364	8.69	1.96

Source: World Trade Organization, 1995.

For the SADC region, the challenge to increase tourism demand remains an important challenge. North African countries receive more than half the total number of visitors to the African region. From the SADC region, South Africa is the leading tourism country, thanks to its developed hotel industry and efficient internal and international transport systems, as well as its policies to promote tourism. Mauritius is a good example of a country that has specialised successfully in up-market and high-revenue beach tourism, while still managing to protect its natural environment.

Tourism flows between African countries are still very weak and this is a contributing factor to the slow development of tourism in that continent, although this trend shows some signs of reversing. Some relevant findings in this regard include:

■   During the period from 1983–1993, visitor arrivals in Kenya grew by 45 per cent. Kenya's tourism industry generates one-third of that country's foreign exchange earnings. [14]

■   In a 1994 study of North American travel consumers, it was found that 77 per cent have previously taken a vacation that involved nature, outdoor adventure or learning about another culture. [15]

■   A study in the United States showed that, over a three-year period, there was an increase from 18 million to 31 million tourists from Europe and Japan who pursued culture and nature as part of their holiday itinerary in the United States. [16]

[14]   Kingsley Holgate: personal communication.

[15]   Kingsley Holgate: personal communication.

- According to the World Wide Fund for Nature, US$55 billion was earned through tourism by developing countries in 1988. [17]

- Approximately 20 per cent of international tourist arrivals are to developing countries and eco-tourism (including ethno-tourism) is the fastest growing sector of the tourism industry, with an estimated growth rate in 1995 of 10 to 15 per cent per annum. [18]

- In 1997, the WTO estimated that 37 per cent of all travel itineraries had a cultural element and estimated an increase of 15 per cent by the turn of the century. [19]

- Tourism contributes 7 per cent of world exports and is growing faster than exports in general, but not as fast as manufactured exports. It is more labour-intensive than manufacturing, but less so than agriculture. [20]

- The international consumer profile for cultural tourists indicates that they are middle-aged, well educated and interested in enhancing both their educational and personal growth. In order to cater to these consumers, a number of countries traditionally perceived as "beach and scenery" destinations have begun to diversify their tourism products to include a cultural aspect. When Australia adopted such a strategy in 1993, an additional US$9.4 million was generated by this sector for the national economy. [21]

- New Zealand, Canada, the United States and Australia are generally recognized as having the world's most advanced policy and support mechanisms for the development of indigenous peoples' cultural tourism projects. [22]

In New Zealand, the Maori Arts and Crafts Institute has been credited with saving the Maori wood-carving tradition from extinction. This institute is a non-profit organization that finances its activities from tourist revenues. In 1995, tourism generated NZ$500 million in the geographical region in which the Maori Arts and Crafts Institute is situated and it was estimated that until the year 2005, ethno-tourism in this region will grow by between 9 per cent and 11 per cent. [23]

In Canada, a professional agency has been established to help finance ethno-tourism ventures in such a way as to ensure that they are primarily owned by the custodians of

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[16] Mafisa. *Culture, tourism and the spatial development initiatives: Opportunities to promote investment, jobs and peoples' livelihoods,* prepared for the Department of Arts, Culture, Science and Technology (1999).

[17] ECOTOURISM, op. cit.

[18] C. Ashley; D. Roe; and H. Goodwin. *Pro-poor tourism strategies: Making tourism work for the poor – A review of experience*, Pro-Poor Tourism Report No. 1 (ODI, IIED and CRT, London, 2001).

[19] www.ecotourism.org/textfiles/stats.txt .

[20] S. Page in *Development Research Insights*, No. 33, ODI (London, June 2000).

[21] www.ecotourism.org/textfiles/stats.txt .

[22] www.ecotourism.org/textfiles/stats.txt .

[23] ECOTOURISM, op. cit.

the heritage that is being commercially exploited. The agency provides advice on authentic aboriginal culture, advice on how to safeguard fragile eco-systems and economic advice. [24] Various tertiary educational institutions have established links with ethno-tourism projects and provide research, technological and expertise support for them. It is believed that these kinds of support are essential for aboriginal communities in order to ensure that these ethno-tourism projects receive the financial, planning and research backing that will help create the conditions to offset the supposed negative aspects of cultural tourism.

1.6 Regional trends

While ethno-tourism in the SADC region is perceived to be a sector with growth potential and while there is a general increase in interest in this type of tourism, there has also been a decrease in tourism numbers in recent years. Ethno-tourism trends follow the general tourism trends for the region. As a result of the political instability in Zimbabwe that began in 2000, the 1999-2000 floods in Mozambique and Mpumulanga, the violent deaths of tourists in Capriivi in 2000 and the perception of criminal danger in South Africa, tourist visitor arrivals to the region have declined. About 20 per cent of Mauritian exports are from tourism but only about 6 per cent in Zimbabwe and South Africa. [25]

1.7 Globalization and ethno-tourism

It has been suggested that tourism has led the globalization process in the areas of transportation, communications and financial systems. Many criticisms have been levelled at the trend of globalization and the upsurge in world tourism and their perceived negative impacts upon local indigenous communities. [26] Some of these issues are relevant to the ethno-tourism sector in the SADC region and, therefore (although they may be mentioned elsewhere in this document), warrant further consideration here.

■ Tourism's potential benefits have not been to the advantage of indigenous peoples.

This claim is generally not accurate for the ethno-tourism industry in the SADC region. Ethno-tourism has provided employment and generated income for players in the subregion. It has also provided training and skills transfer. However, in some instances indigenous people have been exploited and have not received adequate compensation for their contributions. One clear example is the case of the San people in Namibia (see box 9 in section 5.7).

■ Indigenous people have not been invited to participate adequately in the formulation of tourism policies that affect them.

For the SADC region, this is an accurate generalization. In some exceptional instances, private tour operators have consulted widely with indigenous people about the benefits and costs of tours in their area as well as about content of the tours. In several SADC countries (notably Namibia), there is an emerging sensitivity to the need for

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[24] ECOTOURISM, op. cit.

[25] S. Page in *Development Research Insights*, No. 33, ODI (London, June 2000).

[26] L. Pera and D. McLaren. "Globalization, tourism and indigenous peoples: What you should know about the world's largest 'industry", The Rethinking Tourism Project MN US (1999).

participation by indigenous people in tourism policy. Annex 1 reviews Namibia as a country with marked potential for the development of the ethno-tourism sector.

- Globalization and mass tourism have resulted in the commodification of peoples and cultures. "A people's culture is put on display on postcards, promotional literature and even their own homes when tourists arrive."

This criticism is true, but it fails to recognize that some degree of commodification is necessary for marketing. If ethno-tourism is to make positive contributions, it must be marketed. It is not possible to sell a tour if no one knows about it.

- Tourists' quest for authenticity can lead to a distortion of the local culture for the enjoyment of tourists; culture is reduced to just another product to be traded.

It needs to be accepted that if a tour is sold, then that tour is a product. It has been shown quite clearly that the most viable way to preserve culture is to give it a commercial value.[27] One of the distinctive positive features of ethno-tourism is that it is dependent upon indigenous skills which the local people typically possess. Not only does the sector benefit from these skills, but also often enhances them, as they are utilized as a part of the income-generating potential of this sector.

- Mass tourism introduces a consumer culture into communities whose societies and values may not be based on the economic power of the individual.

This may be true for other more remote indigenous cultures, but for most communities in the SADC region, entry into the consumer economy is an inevitable result of development in those countries. For example, it is interesting to note that in the Amazonian communities, efforts to keep visitor numbers very low in order to minimize cultural intrusion have conflicted with the local people's desire to increase visitor numbers so as to increase revenues.[28]

- The elimination of barriers to trade will lead to the growth of a tourist monoculture around the world.

The same people who raise this issue are also concerned that tourists' demands for authenticity will commodify traditional lifestyles. This is a contradiction. Demand for authenticity amongst a large variety of cultures cannot lead to uniformity of product. Indeed, the demand by tourists for authenticity and the demand for the ethno-tourism product are the very forces that may best serve to preserve cultural heritages.

- The forces of globalization tend to favour more dominant world cultures and to undermine other cultures. Nations, regions and people must have rights to preserve their cultures from erosion by the dominant consumer culture.

Ethno-tourism creates a demand for indigenous cultures by dominant cultures and is therefore a powerful force for the preservation of indigenous culture.

- Protection of intellectual property rights. Bio-piracy often happens under the guise of eco-tourism and ethno-tourism.

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[27] Mafisa, op. cit.

[28] ECOTOURISM, op. cit.

Bio-piracy involves the exploitation of indigenous biological resources by outside parties without indigenous traditional custodians deriving any benefit – a serious problem for developing countries. Similarly, intellectual property is often exploited. A recent example in Canada involved the commercial development of a medical drug whose herbal ingredients and traditional knowledge originated in Zimbabwe. In the ethno-tourism context, this relates to traditional knowledge systems that are appropriated and commercially exploited. These may be knowledge systems related to use of the biological resources, as box 2 outlines.

Box 2. Intellectual property and traditional knowledge

The intellectual property (IP) system is dynamic, characterized by its ability to evolve and adapt. Current technological advances, especially in information technology or biotechnology, as well as the evolution of society itself, necessarily call for constant re-evaluation of this system. Changes rarely take place without first being discussed - and often disputed - at national and international levels.

"Traditional knowledge" itself has a number of different subsets, some of them designated by expressions such as "indigenous knowledge," "folklore," "traditional medicinal knowledge" and others. Contrary to a common perception, traditional knowledge is not necessarily ancient. It is evolving all the time, a process of periodic, even daily creation as individuals and communities take up the challenges presented by their social and physical environment. In many ways therefore, traditional knowledge is actually contemporary knowledge. Traditional knowledge is embedded in traditional knowledge systems, which each community has developed and maintained in its local context. The commercial and other advantages deriving from that use could give rise to intellectual property questions that could in turn be multiplied by international trade, communications and cultural exchange.

The emergence of a global information society in recent years, characterized by the advent of modern information technologies, has also given rise to increasing awareness of traditional knowledge. The role of IP in the protection of traditional knowledge is currently being considered in several of these policy contexts, in addition to discussions taking place in IP circles.

The World Intellectual Property Organization's (WIPO) past work in this area dates from 1978 and focused mainly on expressions of folklore. Three meetings of experts were convened jointly by WIPO and the United Nations Educational, Scientific, and Cultural Organization (UNESCO) which led to the adoption in 1982 of the Model Provisions for the National Laws on the Protection of Expressions of Folklore Against Illicit Exploitation and other Prejudicial Actions (the "Model Provisions").

More recently, in 1998 and 1999, WIPO also undertook a series of nine fact-finding missions (FFMs) to identify and explore the intellectual property needs and expectations of the holders of indigenous knowledge and innovations, in order to promote the contribution of the intellectual property system to their social, cultural and economic development. These missions were intended to enable the study of current approaches to, and future possibilities for, the protection of the intellectual property rights (IPR) of holders of indigenous knowledge, innovations and culture. From the FFMs, WIPO learned that traditional knowledge is a rich and diverse source of creativity and innovation. It further revealed that traditional knowledge systems are frameworks for continuing creativity and innovation in most fields of technology, ranging from traditional medicine and agricultural practices to music, design, and the graphic and plastic arts. WIPO also learnt that the intellectual property (IP) issues related to traditional knowledge cut across the conventional branches of intellectual property law, such as copyright and industrial property. In general, the FFMs showed the richness and diversity of traditional knowledge on a global scale, both in terms of its inherent creativity and as potential subject matter for IP protection.*

In 1998–99, four regional consultations on the protection of expressions of folklore were held. Each of the four regional consultations adopted Resolutions or Recommendations which include proposals for future work addressed to WIPO and UNESCO, on the one hand, and to national governments of the respective regions on the other. The recommendations unanimously specify four activities for further work in this field, namely, (i) the provision of legal and technical assistance on the protection of folklore; (ii) specialized training in identification, documentation, conservation and dissemination of folklore; (iii) the provision of necessary financial resources to relevant national and regional centres and institutions; and (iv) the development of a effective international regime for the protection of expressions of folklore.

At the 26th session for the General Assembly of the Member States of WIPO, held in Geneva in 2000, the Member States established an Intergovernmental Committee on Intellectual Property and Genetic Resources, Traditional Knowledge and Folklore for the purposes of discussions on these subjects. The Intergovernmental Committee is open to all Member States of WIPO. As is usual in WIPO bodies, relevant intergovernmental

There is no evidence in the SADC countries of a "conspiracy" to use ethno-tourism or eco-tourism as a guise for bio-piracy or intellectual property appropriation. Furthermore, developed countries have been involved in successful lobbying for international treatises regarding royalties for indigenous biological and intellectual property that has been successfully marketed internationally.

■ Large-scale tourism has a tendency to dominate a whole regional economic base. Tourism destroys local means of livelihood and can destroy local industries through the build-up of transportation, communications and economic infrastructure.

No doubt this is a concern in areas where tourism impacts on a healthy traditional economy that has never previously experienced interference. Most of the SADC countries have a colonial history that impacted upon the indigenous people and resulted in their occupying marginal land and being disenfranchised from the economy. In these countries, improvements in transportation, communication and economic infrastructure represent an improvement in life-style and opportunity for entrepreneurial emergence.

■ Although tourism is said to be the world's largest employer, the jobs created often do not provide an adequate living wage or job security with benefits. They are often not jobs in which people can develop skills.

In the SADC region, there are examples in which the above is correct (as box 9 in section 5.7 shows in the case of the Namibian San people). Elsewhere, however, ethno-tourism has provided secure employment with benefits and competitive wages, as this report will show.

In conclusion, a realistic approach is required to understand and deal with the impacts of globalization and tourism on indigenous people. The expansion of tourism into poor areas is inevitable. Rather than question the desirability of tourism, strategies can be adopted to ensure that growth in tourism results in benefits for indigenous people and the poor and that negative impacts are minimized. Research has shown that already growth in tourism provides definite benefits to the poor and that these most often outweigh the costs. Furthermore, greatly increased benefits to the poor are possible if pro-poor tourism strategies are adopted. [29]

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[29] Ashley, Roe, and Goodwin, op. cit.

2. Overview of the value chain in the ethno-tourism sector

2.1 General

This study employs Charles Landry's modified value chain model for analysis of the ethno-tourism industry.[30] This model allows the sector to be divided into its major components in order to facilitate analysis and gain an understanding of the distribution of economic value in the production process in this sector, as well as identification of the weak links in the production process. A generalized value chain for the ethno-tourism sector is described below. The relative strengths in the five segments of the value chain according to each of the SADC countries are described in Annex 4.

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[30] International Labour Organization: Terms of Reference for research study into SMEs and the creative industry in five Southern African countries (Oct. 2000).

2.2 A generalized view of the Landry value chain for the ethno-tourism sector – How it works

Figure 2.1.   Diagram of the sector according to the Landry value chain

1. Beginnings
Recognition of the potential for the product
An environment conducive to tourism
Quantity of tourists, quality of tourists
Availability of a cultural resource
People skilled in delivery of this resource

5. Audience feedback
Response of the consumers to the product
Direct comment from the consumers to the
players involved in delivery. Consumer
questionnaires
Consumers report-back to the booking
agent
Articles in travel journals and travel guides

2. Production
Design of the tour
Tour content
Identification of the players responsible for
delivery training of these players

3. Circulation
Marketing of the product
Transfer of clients to the product

4. Delivery mechanisms
Ticket sales
Presentation of the tour

Beginnings

"Beginnings" refers to the prevailing social, political and economic conditions, which create the cultural milieu or context in which the industry operates. In the ethno-tourism sector, "beginnings" refers to the recognition of the potential for the product. This requires an environment conducive to tourism, in terms of quantity of tourists, quality of tourists (i.e. do they fit the profile for ethno-tourists?) and availability of a cultural resource, as well as people skilled in delivery of this resource.

Production

Production refers to the process whereby the product is created. In the context of ethno-tourism, this involves the design of the tour and decisions regarding tour content. It also involves identification of the players responsible for delivery of the tour and training of these players.

Circulation

Circulation refers to the means by which the public is informed about the product. This involves the marketing of the product and transfer of clients to the product. Marketing involves many activities, such as direct visits to travel and tour agents, attending travel shows and posting web sites. Physical delivery of the consumers to the point of delivery is also considered to be an important part of the circulation link.

Delivery mechanism

The delivery mechanism allows the audience to witness the product. This involves ticket sales as well as presentation of the tour itself.

Audience reception

Audience reception in this context refers to the response of the consumers to the product. In the ethno-tourism sector, consumer response is ascertained in several ways. Most often there is direct comment from the consumers to the players involved in delivery. Some companies request that consumers complete a questionnaire, which enquires about their perceptions regarding the quality and content of the tour. Consumers often report-back to the agent who booked the tour expressing their responses to the tour. Travel journalists also publicize consumer responses in travel journals and travel guides.

Audience reception and feedback influence the beginnings. Positive feedback entrenches the production of the tour, whereas negative feedback requires that the product be altered to accommodate the wishes of the consumer. Similarly, changes in consumer profile might be reflected in a change in audience reception and would influence future product content.

3. Players in the ethno-tourism sector: The value chain in the SADC region

3.1 General

The value chain of this sector appears to be consistent throughout the SADC subregion. The value chain is more influenced by the scale and aims of the particular enterprise than by the country in which it occurs. There exists a continuum from non-commercial (e.g. museums) to small-, medium and large-scale entrepreneurial firms, over to the purely commercial enterprises. In parallel with these economic features is a trend of authenticity, with the smallest scale commercial ventures tending toward complete authenticity and the largest enterprises generally being spectacular reconstructions and portrayals of traditional ethnic features.

> **Key issue:** There is a tendency to place value judgement on authentic and reconstructed villages. Many people are scornful of recreated villages, describing them as inaccurate and "a farce", while functioning villages are perceived to have greater authenticity and value. This is a fallacious perception. Recreated villages play an important role in education and can be just as authentic as a functioning village if they are accurately represented. The recreated village Shakaland is a good example in its accurate representation of a past lifestyle of the Zulu nation. It can be compared to a museum, depicting something no longer in existence. It is in fact a vibrant, economically viable repository of heritage.

In general terms, the key players in the ethno-tourism value chain are the tour operators or lodge owners (depending on the product), who control the beginnings and the production of the product. Production is sometimes shared with local villagers (in the case of genuine village tours). Circulation is most often also controlled by the tour operator, with some responsibility going either to outside specialists or to affiliated companies. The sales component of the delivery link is often shared by several players. While the tour operator may make direct sales, these are more often managed by specialized retailers of tourism products, such as travel agents and travel consultants. The tour operator also sometimes controls delivery of the audience to the product. Otherwise, this service is left to other players such as taxis, other tour operators or the consumers themselves. The tour operator also often conducts assessments of audience consumption.

Ethno-tourism is most prevalent and successful in South Africa and Namibia. South Africa is conspicuous for several of its economically successful and sensational ethnic recreations, which include accommodation, dance, music, theatrical and gastronomic experiences. While cultural tourism is not yet very well established in Namibia, where it does exist, there is a greater degree of community involvement than in South Africa. Furthermore, Namibia has well-organized NGO support as well as a commitment from government to support community-based tourism initiatives.

Zimbabwe and Zambia are also important players. Annex 2 reviews Zimbabwe as a country with potential for the development of the ethno-tourism sector. At present the players in Zimbabwe and Zambia are mainly medium to small-scale and the emphasis is on shared community involvement with the tour operator. Botswana and Mozambique are conspicuous by their relatively weak representation in this sector. Mozambique's poor performance can be understood in terms of their poor tourism numbers as a result of years of civil war. As tourism numbers increase, the potential in this sector should be recognized and exploited. Botswana has been slow to exploit this potentially lucrative sector, however, there is clearly awareness of and interest in the potential of ethno-tourism. For example, a few enterprises in the ethno-tourism sector have started up recently in Botswana.

3.2   The value chain in the region

Figure 3.1   Who does what?

1. **Beginnings**
Tour operators, entrepreneurs,
advisors

5. **Audience feedback**
Questionnaires, **d**irect client feedback,
travel journalists, awards

2. **Production**
 Tour operators, entrepreneurs, guides,
community, advisers, coordinators

3. **Circulation**
Tour operators, marketing
companies, travel shows

4. **Delivery mechanisms**
Guides, villagers
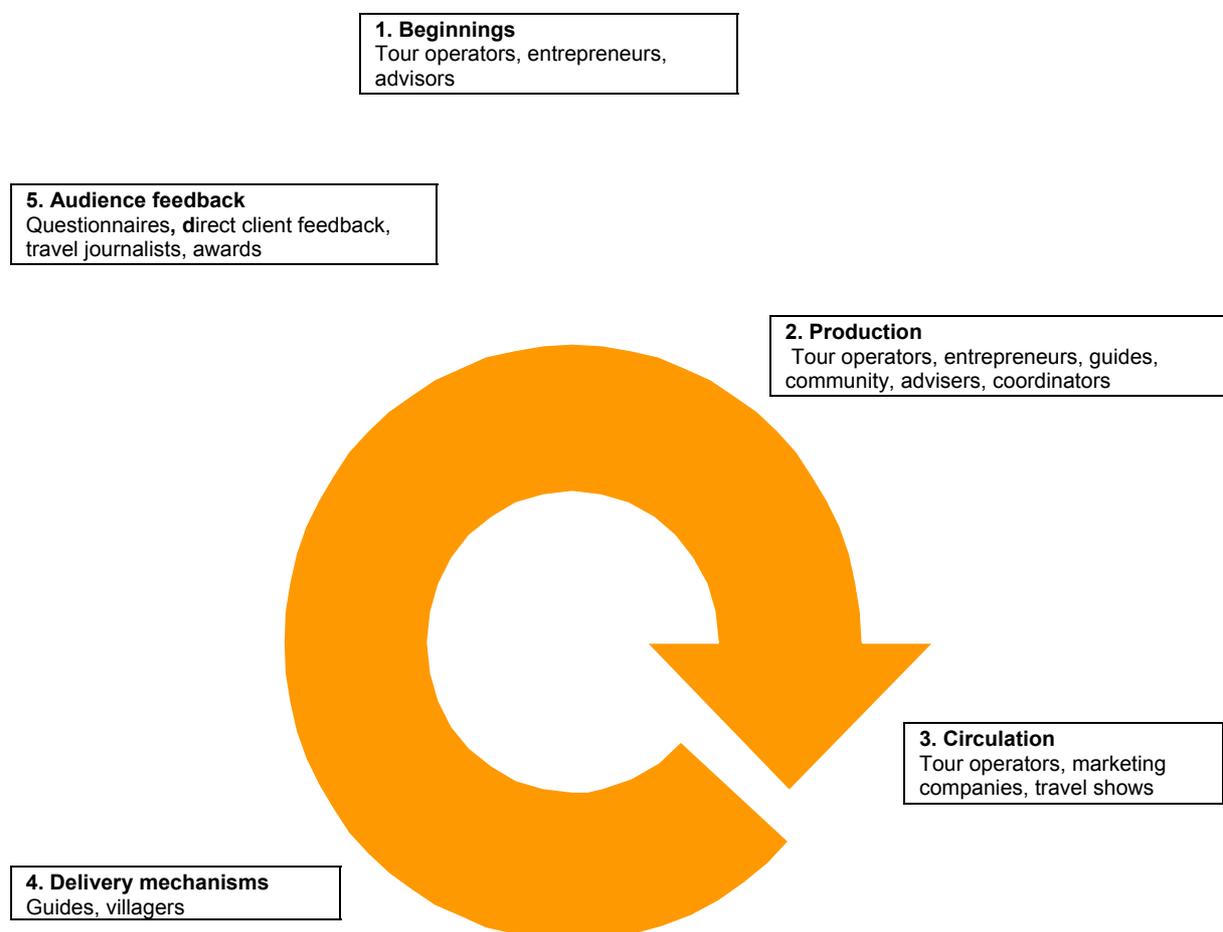
3.2.1 Beginnings

Prerequisites for the beginnings of ethno-tourism are a vibrant tourism industry, an entrepreneurial vision and a cultural heritage that is unique and interesting. All of the countries in the region under study have interesting cultural heritage suitable for ethno-tourism, but tourist visitor numbers vary for different countries as well as for different regions within each country. The protracted civil war in Mozambique has severely curtailed tourism, with the result that cultural tourism is not evident. Although Botswana has had a thriving tourism industry for the past 20 years, cultural tourism has not yet emerged as a significant component of the Botswana tourism industry. This is because tourism in Botswana has focused very narrowly on wildlife and ecology.

In the SADC region, the players responsible for beginnings are entrepreneurs, government and non-governmental advisors and coordinators. The particular players depend upon the scale and motivation of the project. Ethno-tourism initiatives that are

part of a development agenda are often initiated by government or NGO advisors, whereas private commercial operations are usually started by entrepreneurs.

Box 3. Tour operator encourages the local community to build ethno-tourism product in Zambia

Robin Pope Safaris operates in the South Luangwa National Park. Some guests on these safaris expressed a desire to learn more about the lifestyle of the local people. As a result, the enterprise assisted the local community to establish an ethno-tourism product. RPS now only conducts marketing on behalf of the village. In this case, RPS was responsible for the beginnings and participated in production of the product but does not benefit from income generated.

Key issue: To a large extent, tourism in the SADC countries revolves around wilderness areas. With population growth there has been increasing conflict between wilderness and surrounding rural populations. Several ethno-tourism products have been initiated by individuals and organizations involved with conservation, in an effort to provide local people with a viable income and an alternative to the exploitation of natural resources. One example is the Kwazulu-Natal Wildlife Community Conservation project. The mandate of this body is the conservation of biodiversity in the Hluhluwe – Umfolozi Park. In order to minimize exploitation of the natural resources in this area by neighbouring communities, KZN Wildlife has initiated three ethno-tourism projects in the area.

3.2.2 Production

In the SADC region, production is generally, but not always, performed by those responsible for the beginnings segment of the value chain. For example, Kaya Lendaba is a cultural village situated on a South African farm called Shamwari, which is a multi-faceted tourist attraction. The property is privately owned and offers game drives, game walks, lodges for accommodation, a wildlife orphanage and a curio shop in addition to the cultural experience at Kaya Lendaba. The cultural village was initially perceived as a value-added product to the other core tourist attractions and beginnings can be attributed to the landowner. However, production of the ethno-tourism product was entirely the responsibility of the manager of Kaya Lendaba.

3.2.3 Circulation

Marketing of ethno-tourism products takes many forms in the SADC region. These range from local marketing to making retail agents aware of the product, to attending international travel shows. Some of the main marketing strategies are considered below. Local marketing involves marketing to local tour operators and retail travel outlets. National marketing involves marketing to tour operators and retail outlets in more distant parts of the country. This is especially important in countries with several regions that attract tourists. International marketing involves making international retailers aware of the product and may involve direct international marketing where visits are made to important agents in key countries or it may involve attending international travel shows. With the growth of electronic communication, web sites have become an important international marketing tool. Smaller companies will rely on only local marketing, done by a player who is also responsible for other links in the value chain. This person will perform several roles, overseeing different links in the value chain such as marketing, transport and delivery. However, for larger operations, a dedicated marketing specialist will be employed within the company to perform this role and this person will exploit several different marketing tools. In the largest operations, marketing may be completely outsourced to a specialist travel-marketing agency. In South Africa, a recently arrived NGO called "Fair Trade in Tourism" is offering marketing assistance for tourism activities of disadvantaged communities and population groups.

Circulation also involves the physical transporting of the audience to the site of the ethno-tourism product. In the region, the same players who handle production may do this, or other tour operators who utilize the ethno-tourism product may do it. In the case of smaller operations, the tour operator who was responsible for beginnings and production will often also handle the transport of clients to the site. In the case of larger operations, outside tour operators will bring their own clients to the site. In the latter case, the ethno-tourism product will be produced by specialists who manage the cultural aspect (beginnings, production and delivery) while circulation is handled by retailers.

3.2.4 Delivery mechanisms

Where the tour is conducted in an existing genuine village, local inhabitants, who may have been selected and trained by the tour operator, usually conduct the tours. In some cases the tour of an authentic village is conducted by the tour operator's own employees. In reconstructed villages, the employees of the owner of the product conduct the tours.

3.2.5 Audience reception and feedback

Audience feedback is critical for quality assessment and strongly influences all the other links in the value chain. Production and delivery are clearly influenced by audience feedback. However circulation strategies will also be directed by audience feedback. Audience response to ethno-tourism products is often immediate and direct and takes the form of comments to those involved in the delivery or circulation of the product. Some operators request that consumers complete a product assessment form. This provides accurate and prompt feedback to the operator. Tourist guide-books (such as *The Rough Guide* or *Lonely Planet*), travel magazines (such as *Getaway* and *Out There*) and travel supplements all serve to publicize audience perceptions of a particular product.

3.3 Domination of the value chain by a single player

The ethno-tourism value chain in the SADC region is dominated by the tour operators. The domination of the value chain by a single player is a feature of a developing industry. While cultural tourism is not a new concept, the industry has grown rapidly in a short period of time, and continues to grow, therefore exhibiting features of a developing industry.

For maximal generation of employment in an industry, specialization should exist in each link of the value chain, thereby incorporating more players. It has been suggested that, in order to create more employment in the ethno-tourism industry, interventions should be made to minimize the role of tour operators. This is ill-advised for the following reasons:

■ many of the tour operators in the industry are already working to empower local communities;

■ existing tour operators may be interested in forming partnerships with emerging entrepreneurs who possess valuable resources or skills;

- the existing tour operators set an important benchmark for quality, which must be met by emerging competitors;

- tour operators are an established body with knowledge and skills in the industry. they are an ideal entity with which to work in developing specialized skills relevant to the industry and in improving and growing the industry to accommodate new entrants;

- established tour operators invest a great deal in marketing ethno-tourism, thereby increasing awareness of this type of tourism;

- established tour operators have existing links with the international tourism industry, which is a vital but difficult market to enter;

- the phenomenon of dominance of the value chain by a single sector will change as the industry grows. so growth of the industry is a priority for diversification in the value chain;

- in some instances, the monopoly of the value chain is related to absence of players with suitable skills to occupy various links in the chain. provision of business skills and access to capital may result in the emergence of successful enterprises to play roles in various links in the value chain; and

- as more players assume roles in the value chain, the current tour operators will channel business to the new players.

Several of these positive aspects are showcased in box 3.

3.4 Market for products

The market for ethno-tourism products is composed almost always of tourists only. The consumer profile can be further narrowed to international tourists, since domestic and regional tourists show very little interest in cultural tourism. There is no apparent gender bias in the market, but tourists tend to be more mature (35 years and older) and more affluent. The exception to this is for home-stays in genuine villages, which tend to attract younger, less affluent tourists.

Significant exceptions to the tourist-only profile of ethno-tourism consumers also exist, most notably at Lesedi, the well-known, recreated cultural village in South Africa. This facility discovered that by broadening its client base to include local consumers, it was able to make the operation more economically viable. However a slightly different product had to be created in order for it to attract the local consumer and Lesedi Village therefore offers corporate team-building exercises and workshop facilities at their ethno-tourism destination.

3.5 Legislative issues

There is legislation in all SADC countries regarding licensing of tour companies and guides. This has an impact on ethno-tourism. At certain levels, this sector does not require large capital investment or acquired skills and, except for legislative requirements, is therefore relatively easy to enter. The major obstacle to entry for entrepreneurs is often their inability to meet the minimum legislated entry requirements. South Africa has taken steps to facilitate disadvantaged players by giving a two-year grace period to new entrants before licensing must be completed. Namibia is currently

also considering adopting a similar policy. Some encouraging examples of forward steps are noted below.

In Namibia, "The Ministry of Environment and Tourism (MET) has introduced a Community Tourism Policy and is in the process of redrafting its national tourism policy that will hopefully stress support for community involvement in and benefit from tourism." [31]

Despite this very positive attitude, the ethno-tourism sector faces a unique legislative challenge in Namibia relating to access to land. In this country, almost all community-based tourism takes place in the communal areas of the country. Here, jurisdiction over land is handled by the traditional authorities, but use of land for any business purpose requires a "Permission to Occupy" (PTO) Certificate from the Central Government. It is disagreement over the "ownership" of these lands and coordination of issuing bodies that requires legal intervention. Without a PTO no business or venture can obtain permission to operate.

In addition, the Government is currently looking at introducing new legislation that will require all tourism enterprises to register with the Ministry and comply with certain minimum standards. Within the community-based tourism sector itself, the NGO "NACOBTA" (Namibian Community-based Tourism Association) is already looking at introducing its own minimum standards.

In an attempt to redress historical imbalances and develop some remote rural areas, the South African Government has launched its Spatial Development Initiative (SDI). Amongst the industries proposed for these development areas are several tourism and ethno-tourism concerns. The SDI protocol requires companies investing in the SDI to employ local people.

Legal issues pertaining to tourism in Zimbabwe are covered by its Tourism Act of 1996, which serves to establish the Zimbabwean Tourism Authority and describe its functions. These functions include the promotion of Zimbabwe as a tourist destination, development of marketing skills and initiatives within the tourism industry, promotion of high standards in the industry via establishment of standards, training and human resource development, registration and grading of tourism facilities, market research and a tourism database. The Act also makes provision for the establishment of a Tourism Fund and the imposition of tourism levies in order to sustain this fund. South Africa and Namibia also impose tourism levies to support their respective tourism parastatals.

3.6   Location and agglomeration

The ethno-tourism industry exhibits clear spatial arrangements but the patterns are distinct for different categories of ethno-tourism. Recreated villages are capital-intensive because of building and labour costs and depend on large volumes of visitors for commercial survival. For this reason, geographic location of these enterprises is the single most important consideration for their success. These establishments must be situated close to or on the travel route of a regular market source of tourists. There is therefore clear agglomeration of related industries such as the hotel industry, the tour industry, the restaurant and catering industry and other tourism industries.

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[31] A. Davidson: personal communication (2001).

Tours to authentic villages are by definition usually more remote from cities or tourist attractions (township tours are exceptional in this respect). However, in order to attract sufficient clientele and make the tour affordable and logistically practical, these products must be located close enough to the source of the market. In these cases, a different sort of agglomeration is apparent. Villagers selling crafts are attracted to these tours and develop a mutually beneficial symbiosis with the tour operator: the craft sellers add value to the village tour by making it more attractive and the tour operator benefits the craft sellers by bringing them a dedicated audience.

Township tours exemplify a combination of the two models mentioned above. These tours occur within a major tourist city and so benefit from the ready access to consumers. The same sort of agglomeration is evident here as is evident for recreated villages. Township tours occur in association with tour operators, transport providers and accommodation providers. In addition, these tours attract and support local crafters and smaller accommodation providers.

3.7   Stakeholder bodies in the region

In the smaller-scale operations utilizing authentic villages as a destination, the community is the most important stakeholder. Often there will be a central body (trust/committee) that is involved in some links of the chain and that manages benefits that accrue to the community in general. In other cases, the community stakeholder is more specific, involving another community entity such as a school or clinic, or it may be an individual who provides a venue or is partly involved in production.

Box 4. How one stakeholder is benefiting from ethno-tourism in South Africa

Golden originates from the Eastern Cape. He has worked in the mines, as a gardener, and as a curio vendor. He now makes artificial flowers from cola cans. Although he is extremely talented, he was not able to market his product until Enver Malley from Grassroute Tours met him and included him in Grassroute's "Beyond the rainbow curtain" ethno- tour. Now not only do tourists on the tour purchase his flowers, but the resulting exposure has made him famous and he has an enormous market for his flowers, such that his earnings may now supersede those of the tour company. This is an exceptionally successful example of stakeholder benefit from ethno-tourism.

The clustering that characterizes this industry creates many peripheral beneficiaries who then develop an interest in the maintenance and growth of the industry. As box 4 illustrates, these include craft sellers who are dependent upon ethno-tourism visitors for their market.

In some areas, the rural councils are stakeholders or are trying to become stakeholders. There is strong resistance to their involvement in Zimbabwe and Zambia, where the key players do not believe that the rural councils will provide any benefit, while they will definitely incur additional costs and impose regulations. Others see the rural councils' proposed regulations as a potential positive development, as it may: (i) control quality; (ii) protect rural communities from exploitation; and (iii) regulate pirate/illegal operators. [32]

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[32] T. Chuma: personal communication (2001).

3.8   Developmental and social issues

■   Community benefits

As noted above, the ethno-tourism industry has many stakeholders beyond the key players. In many instances, entire communities benefit from this activity via community trusts or committees. These trusts decide on how best to use income generated by ethno-tourism in order to benefit the community at large. Examples include improvements to schools; building, stocking or staffing health clinics; improvements to community water resources; fencing community properties; spraying against malarial vectors and purchasing.

■   Employment generation and skills transfer

In some instances, the establishment of a tourism product in a community provides not only employment but also opportunity for transfer of skills that may be universally applicable. The skills required for hosting and communicating with foreign tourists are valuable skills for employment in many sectors of the hospitality industry. Similarly, an individual who acquires a driver's licence for transporting clients to an ethno-tourist facility has an improved opportunity for finding employment as a driver in other industries.

■   Strengthening of traditional cultural values

Some ethno-tourism ventures have resulted in increased awareness and pride in a culture from within the community, and a return to traditional values. All the SADC countries have experienced enormous urbanization within a very short period of time – often within one generation. This has resulted in rapid loss of cultural knowledge and values. Ethno-tourism serves as a catalyst to renew cultural knowledge. Many youth have begun to take an interest in their own cultural history. Through ethno-tourism, as box 5 shows, what is of interest to foreign visitors can heighten awareness and pride in what previously had no value for local or urban youth in the host country.

Box 5. Hosting foreign visitors: Urban youth rediscover their cultural roots

Kaya Lendaba is a successful ethno-tourism venture situated 75 kilometres from Port Elizabeth in South Africa. The product consists of a re-created village depicting the three major ethnic groups in South Africa – Xhosa, Zulu and Sotho. Huts have been built in the styles characteristic of each of these ethnic groups. The tour includes discussion about the traditional greetings, ceremonies, cuisine and cultural values of each group. Tours are conducted by youths between the ages of 18 and 25 years. These youths come from different parts of the country but are all urban, unemployed and working in order to raise money to continue their studies. Asked for their comments on the value of this ethno-tourism product, they unanimously agreed that through working at Kaya Lendaba, they had rediscovered their cultural roots and had developed a new-found respect for their heritage. They said that it had helped them to benefit from positive features of both the modern urban and the traditional lifestyles.

■   Bridge across cultural and national boundaries

Ethno-tourism allows for cultural exchange between host and visitor. This personal interaction broadens perspectives, destroys stereotypes and increases respect for different cultures, among both host and visitor.

■   Income generation

One of ethno-tourism's greatest advantages is its ability to generate income. Significantly, much of this income is valuable foreign currency. In addition to revenue earned by communities directly through ethno-tourism, established tours often attract donations for community projects.

- **Micro-, small and medium enterprise development**

The ethno-tourism sector lends itself to the development of smaller enterprises. For smaller-scale authentic ethno-tourism, the product involves displaying indigenous culture in a genuine functioning household or village, which already exists. Therefore, for the key delivery link in the value chain, skills are intrinsic and investment requirements are minimal. This feature allows entry by small-scale entrepreneurs.

- **Community development**

Many ethno-tourism projects have a community-based component and therefore may benefit the broader community. The management of income generated by and for these communities requires the creation of community bodies, which must represent the wishes of the community as a whole. The development of the ethno-tourism product and the management of community benefits are foci around which the community can develop unity.

- **Gender neutral**

Many of the links in the ethno-tourism value chain are conventional economic activities, which share the historical gender biases characteristic of those industries. These include marketing, sales and production. However, delivery of the product involves display and explanation of domestic and cultural features and the rapid recent growth of this industry has not yet established stereotyped gender roles. At present, the industry appears to have equal numbers of women and men involved in delivery aspects of the product. However, there is a bias in some areas towards men conducting the interpretation and communication with visitors that can be traced to a traditionally greater access to primary education for boys than girls. As a result, the older women in some rural communities do not speak English, whereas their male counterparts do.

In three case studies of pro-poor tourism enterprises, it was found that a high proportion of the employees in these establishments were women. However, the same study concluded that women face greater difficulty than men do in entering small businesses and in participating in community-based organizations.[33]

- **Agglomeration and secondary employment opportunities**

The ethno-tourism sector creates a niche for the development of related secondary income-generating activities such as crafts, dance, music and theatre. It also creates employment in the industries that service the sector. These industries are listed below. Cultural tourism venues, for example, have been used for film and advertising sets as well as venues for corporate workshops and team-building exercises.

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[33] Ashley, Roe and Goodwin, op. cit.

■ Secondary industries

The ethno-tourism sector supports a large number of secondary industries. Tourists who participate in cultural tours require refreshments in the form of drinks, snacks and sometimes meals. Retailers, wholesale drink distributors and catering companies provide these services.

The venues for ethno-tours are very lucrative points of sale for crafts. Since the crafts are perceived as a cultural and ethnic product and the buyers are a captive market seeking unique souvenirs, the craft sector is a secondary industry that benefits greatly from association with ethno-tourism. Related to this issue, box 6 summarizes how small and medium entrepreneurs can increase marketability by applying industrial design protection, a relatively simple and inexpensive way to develop and protect traditional handicrafts.

Box 6. Industrial design: A mechanism to protect traditional handicrafts

Industrial design makes an article attractive and appealing; it adds to the commercial value of a product and increases its marketability. An industrial design is the ornamental or aesthetic aspect of an article produced by the industry or handicraft. These ornamental aspects may be constituted by elements which are three-dimensional (the shape of the article) or two-dimensional (lines, designs, colours) but must not be dictated solely or essentially by technical or functional considerations. Industrial designs are applied to a wide variety of products of industry and handicraft: from technical and medical instruments to watches, jewellery, and other luxury items; from house wares and electrical appliances to vehicles and architectural structures; from textile designs to leisure goods. To be eligible for industrial property protection in a country, industrial designs must be original or novel and must be registered in a government office (this is usually the same office that grants patents and trademarks). Different countries have varying definitions of what is "novel", as well as variations in the registration process itself. Generally, "new" means that no identical or very similar design is known to have existed before. Once a design is registered, a registration certificate is issued. Following that, the term of protection is generally five years, with the possibility of further periods of renewal up to, in most cases, 15 years. However, certain countries provide also for the protection of unregistered industrial designs. Thus, traditional crafts in principle receive industrial design protection.

When an industrial design is protected, the owner – the person or entity that has registered the design – is assured an exclusive right against unauthorized copying or imitation of the design by third parties. This helps to ensure a fair return on investment. An effective system of protection also benefits consumers and the public at large, by promoting fair competition and honest trade practices, encouraging creativity, and fostering more aesthetically attractive products. Industrial designs can be relatively simple and inexpensive to develop and protect. They are reasonably accessible to small and medium-sized enterprises as well as to individual artists and crafters, in both industrialized and developing countries.

In some countries, some types of industrial design are also protected as works of art (works of art being objects of copyright protection). In certain countries, there may be an overlap between industrial design and copyright protection. Under certain circumstances, a design can also be protected by an unfair competition law.

The main International Agreements on Industrial Designs are the Paris Convention for the Protection of Industrial Property, 1883 and the Hague Agreement Concerning the International Deposit of Industrial Designs, 1925.* These are both WIPO-administered treaties. In addition, the TRIPS Agreement also contains provisions on industrial designs.**

* See Geneva Act (1999) of the Hague Agreement Concerning the International Registrations of Industrial Designs, Adopted by the Diplomatic Conference on 2 July, 1999. **Part II, Section 4, Article 25 of the Trade-Related Aspects of Intellectual Property Rights Agreement.

Some of the larger recreated cultural villages in South Africa offer overnight accommodation to their visitors. These operations have found it most practical and economically viable to subcontract this aspect to professional hotel management teams.

Almost all ethno-tourism requires visitors to be conveyed to the tour itself and this involves motor vehicles. The motor industry is an important secondary industry upon which ethno-tourism depends. The taxi industry is often also an important secondary

industry, but has been involved in direct sales and piracy in some areas and therefore may compete directly with the primary ethno-tourism industry.

3.9   Coordinating bodies in the region

■   The only regional coordinating body with an agenda that includes ethno-tourism is RETOSA – the Regional Tourism Association of Southern Africa. This organization is answerable to a board of directors composed of two representatives from each of the 14 SADC countries. With one representative from the private sector and the other from the public sector, RETOSA claims to represent the tourism interests of both these sectors in all of the SADC countries. Established in 1997, RETOSA's role is to market the region as a tourist destination.

■   There are a large number of national coordinating bodies. Many of these are associate national members of RETOSA in either the public or private sector, while others are independent NGOs.

■   Fair Trade in Tourism South Africa (FTTSA)

Although not restricted to ethno-tourism, this NGO has recently opened an office in South Africa. It is an independent, non-profit programme of the IUCN (World Conservation Union), which aims for fair trade in the tourism industry. This means involving disadvantaged communities and population groups in tourism, obtaining a fair share for those involved in the tourism industry, ensuring respect for human rights, culture and environment (both by host and visitor) and transparency throughout the tourism industry.

■   Namibian Community-based Tourism Association (NACOBTA)

NACOBTA is a non-profit membership organization that supports communities in their efforts to develop tourism enterprises in Namibia. NACOBTA offers the following services to its members: training, business advice, marketing, funding, advocacy and a booking and information system.

■   Federation of Namibian Tourism Associations (FENATA)

FENATA is the private sector representative body for tourism operators in Namibia. It is represented at RETOSA.

■   Hotel and Tourism Association of Botswana (HATAB)

HATAB is the private sector representative body for tourism operators in Botswana. It is represented at RETOSA.

■   Zimbabwe Council for Tourism (ZCT)

The ZCT is the private sector representative body for tourism operators in Zimbabwe. It is represented at RETOSA.

■   Zimbabwe Association of Tour and Safari Operators (ZATSO)

ZATSO is a private sector organization affiliated to the ZCT and representing only the tour and safari operators but not other sectors of the Zimbabwean tourism industry (e.g. hotels, boat owners, etc.)

■   Zimbabwe Tourism Authority (ZTA)

The ZTA is a Zimbabwean Government appointed authority answerable to the Minister of Environment and Tourism. The primary functions of the ZTA are to market Zimbabwe as a tourism destination, to register tourism facilities and to collect tourism levies.

■ Working Group of Indigenous Minorities in Southern Africa (WIMSA)

The WIMSA is based in Namibia and works exclusively with the San people or Bushmen. They provide lobbying and legal advice and technical advice to communities in all aspects, but particularly in the development and management of tourism ventures.

■ ZIMHOST

ZIMHOST is an independent Zimbabwean body that trains players in the tourism industry to develop better hospitality skills, with the aim of improving Zimbabwe's tourism image abroad.

3.10 Government's obligation to support the ethno-tourism industry

Section 1.3 of this report observed that the ethno-tourism sector has intrinsic importance beyond its ability to generate income and provide employment. "Culture and cultural heritage are crucial to people's identity, self-respect and dignity." Ethno-tourism creates an environment in which cultural heritage can be dynamic, in which the youth can inherit their oral traditions and cultural values in spite of the rapid urbanization and fragmentation of social fabric that accompanies it. For these reasons, governments and donors in the region should play a more active role in supporting ethno-tourism and other forms of cultural tourism. This should take the form of investment in museums and in facilitating networking between ethno-tourism ventures and those museums. Valuable ethno-tourism ventures that make a significant cultural contribution, but are not economically viable, should be eligible for subsidies. Box 7 provides an example of an historically valuable site whose relative inaccessibility to tourists impedes its ethno-tourism earning power.

Box 7. Historical value versus economic viability

Mwinji Cultural Village in Zimbabwe is so remotely situated that only the most dedicated and interested tourists manage to reach the village. As a result, it is not economically viable but is of enormous cultural value. The village, 250 kilometres from Victoria Falls, is believed to be where King Lobengula sheltered during his escape after the fall of his kingdom in Bulawayo. History has it that this last King of the Matabele people was hosted by the local Tonga Chief, Pashu and then took refuge in a nearby cave. In addition, the village hosts several annual cultural events including a Tonga funeral memorial service, a rain-making ceremony, a healing ceremony, a male rites-of-passage ceremony and a cultural festival.

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4. Opportunities and initiatives

4.1 Global context

Statistics provided elsewhere in this report illustrate that tourism numbers are clearly expected to increase and that cultural tourism is a form of specialized tourism currently favoured by consumers.

4.2 Regional context

Ethno-tourism is an increasingly popular form of specialized tourism. Southern Africa has a huge diversity of ethnic groups and a captive audience drawn by other natural heritage features. The opportunities for developing this sector are great. Political change in southern Africa has made the SADC countries more easily accessible and more attractive to tourists. The ethno-tourism sector is diverse and all specialized market options must be considered. These include: village tours; village accommodation; and portrayal of ethnic examples of other creative activities (dance, music, theatre/story-telling, etc.).

Cultural tourism has several features that make it extremely attractive for the SADC region:

■ it is dependent upon indigenous knowledge and values and so does not require specialized training for the delivery of the product;

■ micro and small-scale ethno-tourism operations are dependent upon existing infrastructure. Thus, they often require very little capital investment but have the potential to generate revenues rapidly; and

■ it provides employment opportunities and the cost of creating jobs is far less than in other sectors. [34]

Ethno-tourism is a sector that is ideally suited for community-based tourism:

■ many impoverished communities are situated close to important tourism attractions and possess a resource in the form of their ethnic heritage;

■ with some training, business skills and marketing assistance, these communities could provide employment opportunities to their members, as well as generate revenue for the community as a whole;

■ there is potential here for "smart-partnerships", with established entrepreneurs who can provide assets and skills that the community may not possess;

■ ethno-tourism requires skills that are relatively easily learned and resources that are mostly readily available;

■ ethno-tourism ventures are often small-scale and sometimes based on a family business. Facilities and infrastructure are therefore simpler and less expensive than

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[34] Mafisa, op. cit.

those required for mass tourism. These features make ethno-tourism an ideal venture for entrepreneurs with limited financial resources; and

■ local ownership of such ventures provides a boost for local economies. Small and medium-scale ethno-tourism products are usually booked and paid for locally, reducing the capital drain from local countries and communities that often characterizes tourism products.

RETOSA is a potentially powerful marketing tool for ethno-tourism in the subregion. This organization is well represented by both the private and public sectors of every SADC country and is mandated with the task of marketing the SADC countries as a tourist destination.

There are a few large corporations and transnational companies involved in ethno-tourism and community-based tourism in the region. These enterprises have access to large amounts of capital, as well as business skills. Invariably they have expressed a willingness to assist small emergent entrepreneurs, either through a genuine interest or in order to gain political and social kudos or to facilitate their marketing image. In some cases (e.g. Shakaland), these enterprises have already been instrumental in assisting the establishment and marketing of smaller-scale enterprises by locally emerging players. These large companies are traditionally perceived as a threat to emerging enterprises, but in the case of ethno-tourism, which operates on a different scale of investment, these companies should be viewed as potential opportunities for training and shared marketing.

4.3   Specific-country context

■ South Africa

South Africa, the tourism giant of the subregion, receives the greatest volume of tourists of all the SADC countries. The country has excellent communications and transport infrastructure as well as a strong international marketing presence. The South African Government has expressed support for entrepreneurs in the tourism industry who have been historically handicapped through South Africa's apartheid past. The country possesses many tourist attractions and ethno-tourism is yet another product that can add value to the South African tourism industry. For example, the Zulu nation is internationally known through the heritage left by Shaka, as well as literature and films made about Shaka. Similarly, the Xhosa nation has become simultaneously familiar and intriguing to foreign visitors through the repute of Nelson Mandela. Often, tourists are motivated to visit South Africa because it is a newly independent democracy; many have followed the history of the liberation struggle and are familiar with the pivotal role that the city of Soweto played. All these ethnic features in South Africa highlight a potential for ethno-tourism. In varying degrees, entrepreneurial initiatives have already explored these opportunities.

■ Zimbabwe

Until recently Zimbabwe had a very strong tourism industry and education system. It has a very good transport infrastructure and relatively good communications infrastructure. In spite of these developments most of the population have close links to their rural roots. As a result, many people have traditional knowledge but are also capable of communicating this knowledge to foreign visitors.

A Zimbabwean case study

Baobab Cultural Tours is based in Victoria Falls, Zimbabwe. Baobab Cultural Tours has been operating for six years in conjunction with the Monde Village community, which is the closest rural village to the tourist destination of Victoria Falls. Baobab Cultural Tours recognized the market potential for ethno-tourism and also had a clear policy of community participation and involvement. After obtaining grass-roots support for the venture from the community, Baobab Cultural Tours helped the community draw up a deed of trust and open a bank account. They entered into a verbal agreement whereby the Monde Development Trust would earn a royalty on every tourist who came to the village. A local guide was appointed who, together with Baobab Cultural Tours, helped design the tour and decide on content.

Baobab Cultural Tours then advertised the Monde Village Tour locally, regionally and internationally using various media including personal visits, brochure distribution, electronic mail, international travel shows, travel magazine advertising, web site, etc.

The tour was then sold both directly by Baobab Cultural Tours as well as by various travel agents and sales points. Baobab Cultural Tours took responsibility for collecting tourist consumers and transferring them to the Monde Village, where a local guide guided them.

Baobab Cultural Tours maintained quality control via questionnaires to tourists as well as by accompanying the tours.

In the six years since its inception, the major changes have involved:

- increasing community involvement and benefits by making the Monde Development Trust a shareholder in Baobab Cultural Tours;

- the directors of Baobab Cultural Tours have become trustees on the Monde Development Trust;

- appointing and training (in-house) new guides from the village, as a result of the original guide stealing large amounts of money from the village.

Baobab Cultural Tours explains its success in terms of its geographical location close to an international tourism attraction (the Victoria Falls), which provides a "captive market". Accelerating interest in different ethnic cultures is another contributing factor. The authenticity of the product is considered a draw-card – this is a common response and particularly pertinent in that the most economically successful ethno-tourism ventures are not authentic.)

Its weaknesses are perceived as a lack of regulation and lack of commitment by the village, resulting in rampant piracy and competition, which does not benefit the community.

Political instability in Zimbabwe in particular and in the subregion in general is perceived as the major threat to the industry, since the industry is dependent on foreign leisure arrivals and is therefore extremely sensitive to negative publicity.

As is apparent from the observations presented above, the key players in this industry throughout southern Africa are the tour operators and lodge-owners. They invariably control the beginnings and the production links of the value chain. Very often they also control circulation, delivery and audience consumption.

The tour operators and lodge-owners wield the greatest control in the value chain because they are involved in the greatest number of links. They are also invariably the go-between for the production link and the circulation link (if they do not control both of these).

■ Malawi

While Malawi has a well-established tourism industry, this has always been based upon beach and lake leisure holidays. Ethno-tourism has begun very recently in Malawi. There are a few examples of private sector initiatives and the Government is strongly supportive of growth of this sector. The private sector initiatives are varied and include village visits, traditional-style accommodation and cultural museums.

As part of the Government's objective to diversify the country's tourism product, it is actively promoting the sector by developing cultural villages in each of the three districts in the country. Each cultural village will depict the lifestyle of the unique ethnic group indigenous to that district. While the Government has undertaken to finance construction of these villages, a representative cites lack of funding as a constraint to this development.

Some of the lakeside hotels have entered into agreements with local villagers, whereby cultural troupes come to the hotels in order to entertain guests with traditional cultural performances.

■ Zambia

Zambia has a rapidly growing tourism sector. There are already several established ethno-tourism enterprises. As tourism grows there will be potential for more. Zambia has the greatest ethnic diversity of all the countries in the SADC region, providing a large variety for different examples of ethno-tourism.

■ Namibia

Namibia has an excellent road and communications infrastructure and a healthy tourism industry. It is also home to two well-known cultures that have a long uninterrupted history and a strong, well-maintained cultural identity. These are the Himba and San peoples. The greatest opportunity that Namibia has is the commitment of its Government to encourage tourism, to ensure that participation is accessible to all of the population and that the benefits from tourism are widely spread. To this end, the Namibian Government is committed to assisting historically disadvantaged communities and is working closely with a large array of NGOs involved with tourism.

■ Tanzania

Tanzania has a healthy and growing tourism industry. There are two established ethno-tourism ventures, but there is room for more. Some of the players in the industry express frustration at what they perceive as mixed messages from the Department of National Parks regarding cultural tourism, at times encouraging and at other times discouraging private sector involvement in ethno-tourism.

Informal examples of cultural tourism arise where private sector tour operators lease land from communities. These operators often afford their tourist clients the opportunity to spend time with the local fishers or in the local market or village. For these purposes a local guide is employed on an ad hoc basis. This is perceived as part of the lease agreement and a few spin-off benefits do accrue to those few who obtain

employment or rent out their boats to tourists. However, there is no attempt at skills transfer.

- Botswana

Botswana is a popular tourist destination and has an intriguing cultural heritage. The tourism in this country is very narrowly focused on wildlife and this influences the tourist profile. The presence in the country of San people, many of who still practice the "old ways" is an opportunity to initiate a form of ethno-tourism that is attractive to the tourist profile, in combining interpretation of the San culture with practical tracking, hunting and gathering experiences.

5.   Impediments to growth

5.1   Negative tourist perceptions

Because ethno-tourism is a sector of the tourism industry, the same pressures influence it. Most important in southern Africa is the influence of political change and international perceptions of visitor safety. Internal instability in one country can have a major impact on visitor numbers to neighbouring countries, although sometimes these links are more closely related to marketing relationships and consumer nationality profile than to geographical proximity. For example, war and unrest in Mozambique have had a serious negative impact on tourism in that country, but have not greatly affected neighbouring Zimbabwe and South Africa. This is because they have different target markets related to their respective colonial histories and official languages. In contrast, influences that decrease tourism numbers in either South Africa or Zimbabwe (e.g. published crime statistics or bomb-blasts in RSA and the political crisis in Zimbabwe) have dramatic effects on tourist visits to both countries, because both have English as an official language and both have the same target market for tourists.

5.2   Leakage of foreign capital

Although there is no doubt that ethno-tourism generates important revenue for developing countries, there is definite loss of cash to foreign and local tour companies, as box 8 shows. Ethno-tourism operators often lack the business skills and experience to ensure that they obtain a fair share of the tourist spending.

Box 8. Loss of tourist spending to foreign and regional tour companies

"Mauritius … is heavily import-dependent whilst tourism in Zimbabwe and South Africa relies very largely on local supplies. About 10 per cent of spending goes to the foreign agent and around 40 per cent to the airline (often national). Of the rest, almost all is local in South Africa and Zimbabwe, with about one third going abroad in Mauritius."

5.3   Quality control and grace periods

The issue of quality control raises an important dichotomy. Minimum entry requirements are a stumbling block to entrepreneurs and it is generally accepted that entrepreneurs from historically disadvantaged backgrounds deserve a grace period in order to comply with these requirements and standards. Conversely it is recognized that a prerequisite for growth in the industry is strict quality control. The concept of a grace period is a compromise that insists upon high standards but allows a grace period before these standards are achieved. The danger here is that without adequate monitoring to ensure that emerging businesses are achieving the minimum requirements within the stipulated time frame, industry standards will drop to unacceptable levels, with a negative impact on growth and development of the sector.

5.4   Exploitation of villagers by tour operators

There are numerous instances of tour operators conducting tours into authentic villages without conveying any benefit to the community. Alternatively some operators compensate an individual in the village for assisting with a tour rather than the entire village.

The very real threat here is that the villagers will become disillusioned by this exploitation and may resist any future tourism venture that could benefit them.

5.5   Exploitation of cultural property

In many instances, one of which is illustrated in box 9, an entrepreneur has recognized the market potential of a culture that is not his/her own and has exploited that resource without appropriate benefits accruing to the owners.

5.6   Tourism without skills transfer

In many instances, ethno-tourism is conducted by parties that are not part of the culture being portrayed. This results in inaccurate interpretation and portrayal with associated poor quality and consumer dissatisfaction.

It also makes the enterprise unsustainable in the long-term, since the owners of the resource do not possess any of the skills required to provide the associated commodity. They are entirely dependent upon those producing and delivering the product. So if these players withdraw, the product is lost although the owners of the resource that enables the product are still present.

5.7   Inhibitory legislative instruments

All countries in the SADC region have requirements for registration of tourism facilities as well as licensing of tour operators. While the function of these legislative instruments is intended to maintain standards in the industry, their effect is often to inhibit the emergence of new entrepreneurs. In developing countries, the prerequisites for registration or licensing are often too stringent or too costly for emerging entrepreneurs – particularly those from disadvantaged backgrounds. [35]

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[35] Nyaruwata, Shepherd: personal communication (2001).

Box 9. Exploiting the intellectual property of indigenous people

Historically, in Namibia many of the San people were farm labourers. With the boom in tourism, many farms were converted to guest lodges and game farms. The presence of foreign guests created a demand for seeing "Bushmen". The San farm labourers therefore became involved in tourism – exhibiting their traditional crafts, music and culture. On some farms there was also rock-art and the San labourers conducted tours to these art works. They were thus burdened with two jobs – tourism as well as their normal farm work, without being adequately compensated. Many of these farms have an excellent tourism infrastructure but the San play no role in deciding on the tour input. They are not partners and are perceived as farm labour.

On one particular farm a contract was drafted by WIMSA, recognizing the Bushmen as owners of the intellectual property that was being marketed and promising to compensate them accordingly.

This contract stipulated:

- guaranteed living space;

- good salary and working conditions (better than those for farm labouring);

- guarantee that families could move with employees and live together with them in a mock-village;

- guaranteed additional income of 5 per cent of bed levy (N$5 – 6 000/month) to invest in development for remote families as well as in future independent tourism developments for security of selves.

This worked well until management of the operation changed and the San were again required both to cater for tourism and also work as farm labour. In addition, the lodge owner reneged on paying the agreed bed levy. The matter is now going to court for arbitration. It remains a clear example of how the intellectual property of indigenous people may be exploited.

Some SADC member countries have attempted to remove the registration obstacle. South Africa, for example, has recently introduced a grace period for licensing and registration of tourism facilities and guides. These bodies have a two-year period during which they may operate without the required licences. Within this period they must have raised the required licensing capital and achieved the minimum standards required by law.

In Zimbabwe, the Tourism Act of 1996 makes provision for the registering officer to register a tourist facility without the prescribed requirements for registration being complied with. However the same Act does not make provision for the licensing of individuals who have not met the prescribed requirements.

5.8　Conflicts with other livelihood activities

The demands on the time of local guides of ethno-tourism products can result in their neglecting other important productive activities such as agriculture.[36] This generalization, as is apparent from the opinion expressed in box 10, does not hold universally true.

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[36] C. Ashley; C. Boyd; H. Goodwin. *Pro-poor tourism: Putting poverty at the heart of the tourism agenda,* ODI Natural Resource Perspectives, No. 51 (London, 2000)

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**Box 10. Multi-jobbing. A Zimbabwean combines agricultural work with
ethno-tourism and wood carving**

Bishop Ncube has been guiding the Monde Village Tour in Zimbabwe for almost 12 months. He explains that the soils in his home area are extremely poor and can only produce sufficient food for subsistence. There is no surplus for generation of cash. He is therefore involved in two additional income-generating activities apart from agriculture. The first is carving wooden curios for sale to tourists and the second is conducting guided tours of his village. Three jobs in one day? He says there is no conflict of time between these three jobs. The guide work is shared with another guide with whom he alternates tours. This provides flexibility when necessary so that they can exchange duty hours. During the ploughing season there is no conflict with village tours, because ploughing begins at 04h00 and finishes by 07h00. The tour only begins at 08h45.

He would like to guide tourists full time if there was sufficient volume of tourists to make this a viable and consistent source of income.

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5.9 Domination of ownership of tourism products by foreign firms

In some countries foreign companies dominate the tourism industry in general. This results in decreased benefits for local people through employment of foreigners and repatriation of profits. Examples of this scenario are seen in Kenya, where foreign ownership of tourism companies exceeds local ownership. In Mauritius, South Africa and Zimbabwe two or three local companies dominate the industry, with some regional investment. [37]

Large transnational companies have a tendency to expand by absorbing existing small enterprises. This is often accompanied by transferring the players from the absorbed enterprise to other parts of the transnational company, with the result that local talent is lost.

Transnational companies have positive aspects as well. Their access to capital affords them greater marketing leverage, thus increasing awareness of the sector. Since lack of awareness of the sector has been identified as a weakness, this is a positive contribution.

5.10 Dependency upon foreign economies

One impact of globalization is that all national economies are increasingly inter-related. The tourism industry is particularly susceptible to downturns in the world's major economies. These result in decreased disposable capital in the countries of origin and therefore decreased tourism numbers to host countries.

5.11 Stereotyping and sensationalism

Internationally there is concern amongst critics of ethno-tourism that it subverts heritage and reduces it to trivialized entertainment, as box 11 shows. Supporters counter this argument with the many beneficial impacts obtained, including revitalizing cultural interest, income generation and employment creation. A Maori parliamentarian of the

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[37] ibid.

early twentieth century summed up this attitude in a single sentence. Referring to the Maori culture he said, "We need to learn to sell it or lose it".[38]

Box 11.   Ethno-tourism from the critics' perspective

"Global tourism threatens indigenous knowledge and intellectual property rights, our technologies, religions, sacred sites, social structures and relationships, wildlife, ecosystems, economies and basic rights to informed understanding; reducing indigenous peoples to simply another consumer product that is quickly becoming exhaustible."

Source: Pera, L and D. McLaren (1999) Globalization, Tourism and Indigenous Peoples: What you should know about the world's largest "industry" The Rethinking Tourism Project MN USA.

5.12   Sporadic income

Income in the ethno-tourism industry can be sporadic for many of the links in the value chain. In most of the SADC countries, tourism is seasonal, resulting in peaks and troughs in business with associated fluctuations in income. Some of the players in the value chain may have other sources of income that assist them during the lean times. Tour operators, for example, may offer several different products. Although the quiet periods affect all of their products, the cumulative income is sufficient for them to sustain their businesses until the following peak season.

For other, specialized players, it is more difficult. Guides, for example, are greatly affected by the sporadic nature of the industry. They, and other players, are only employed as and when they are required. While this benefits the tour operators, it renders their employees more susceptible to the vagaries of the industry.

Its sporadic income-generating nature also prevents some guides from working solely in the ethno-tourism industry. In order to minimize risk many of these players, particularly local villagers, maintain (or need to maintain) another source of income or subsistence.

5.13   Lack of reliable statistics

Reliable information regarding the magnitude of the market is absolutely essential for any meaningful planning. At time of writing, South Africa is the only country in the study area that has reliable visitor statistics. It should be noted that these statistics are for tourist arrivals in general and are not specific to ethno-tourism. They do however provide a broad framework from which to devise strategy.

Namibia has a cohesive tourism industry with strong government support and participation but in spite of this they do not have useful national tourism arrival statistics. However the NGO NACOBTA (The Namibian Community-based Tourism Association) has educated estimates for tourism consumption of NACOBTA products as well as specific consumption of NACOBTA ethno-tourism products. In addition, Martin Webb Bowen, chairperson of FENATA (Federation of Namibian Tourism Associations) indicated that obtaining accurate visitor statistics is a priority of his organization as well as of the government tourism organizations.

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[38] Mafisa, op. cit.

While the ZTA (Zimbabwean Tourism Authority) provides visitor statistics, the players in the tourism industry in Zimbabwe are sceptical regarding the accuracy of these figures.

5.14   Weak coordinating bodies

The Regional Tourism Organization of Southern Africa (RETOSA) has a very important role to play in marketing the SADC region as a tourism destination. Several of the proposed interventions suggested later in this report rely heavily upon the participation of RETOSA because of its suitable structure to fulfill the proposed functions. However there is scepticism amongst industry players regarding the efficiency of this body and its ability to play a significant role. This concern is borne out by the fact that of 17 email enquiries sent to RETOSA members in ten SADC countries, only a single reply was received. In some cases email addresses had changed but were still on the database of the RETOSA head office. This does not augur well for the proposed interventions that involve this organization. Furthermore, 65 per cent of Zimbabwean tour operators responded that they had "never heard of RETOSA". Clearly this body, which is mandated with marketing the SADC region, needs to be conducting some publicity to its own constituency. This does not augur well for the proposed interventions that involve this organization. Furthermore, 65 per cent of Zimbabwean tour operators responded that they had "never heard of RETOSA". Clearly this body, which is mandated with marketing the SADC region, needs to be conducting some publicity to its own constituency.

6.   Recommendations

6.1   Hospitality training

Almost all of the interviewees consulted for this study mentioned that those involved in the delivery of the ethno-tourism product were naturally talented or inherited their relevant knowledge base. As a result, it would appear that there is no indication for skills-training in terms of information. However, since the tourism industry is a hospitality industry and most of the guides are unfamiliar with this aspect, hospitality training is strongly indicated. Zimbabwe, for example, already has the highly acclaimed ZIMHOST course. Interviewees from other countries have expressed interest in learning more about this course. RETOSA should coordinate regional training by ZIMHOST trainers for other SADC countries. This would develop a reputation of hospitality for the entire SADC region and make it a more attractive tourist destination. The ethno-tourism sector would benefit in two ways from this training. First, players in the sector would benefit directly from the training and their products would therefore improve. Also the training for players in other forms of tourism would benefit tourism in general and result in an increase in tourism volume to the region. This would have the effect of increasing numbers of tourists participating in ethno-tourism products

6.2   Marketing

Most of those interviewed expressed the need for increased marketing of the cultural tourism product. A general sentiment is that the consumer "does not understand the product" and thus is less likely to participate in ethno-tourism. There is a definite need to educate overseas retailers as well as consumers about what ethno-tourism is – and of its value.

The organs for initiating this process are already established and simply need to be coordinated into a dedicated ethno-tourism focus. RETOSA is the designated marketing body for the SADC region and should be mandated with the task of educating the market regarding the value of ethno-tourism. The National Tourism Boards (all members of RETOSA) should be enlisted for assistance in marketing.

Several web sites could also be used to further this aim. Tourism Concern and ACTSA are two UK-based organizations dedicated to encouraging community-based and fair-trade tourism. They both have web sites that advertise tourism products which achieve their minimum criteria.

Recently, the NGO Fair Trade in Tourism South Africa opened offices in Johannesburg, South Africa and one of its aims is to assist underprivileged or impoverished communities with marketing for their tourism products. The Namibian Community-based Tourism Association has a similar commitment to Namibian communities.

6.3   Business skills training

The people most likely to emerge as entrepreneurs in the micro- and small-enterprise arena are the poor and historically disadvantaged who, often, do not possess the business skills required to initiate and operate a business. The ILO already has

modules for training business skills. These should be made accessible to aspirant entrepreneurs in the ethno-tourism industry.

6.4   Quality control

Products with poor quality will not sell well and will damage the image of the sector in general. It is essential to have a set of standards, which must be monitored. The private sector tour operators should be involved in specifying standards. Accreditation and monitoring of products should be the responsibility of a dedicated industry body.

6.5   Private sector alliances

Quality control is critical in tourism ventures. Poor quality operations not only fail, but also have a negative impact on perceptions of the industry in general. The established private sector tour operators and players have experience in this area. It is important to draw on this expertise for training of new entrants into the industry and for product development.

6.6   A regional tourist theme route

Consideration should be given to establishing a regional tourism route that would benefit all of the SADC countries. RETOSA is ideally placed as an organization to design, market and coordinate this route. The World Tourism Organization has been actively involved in designing and marketing two successful regional tours that could be used as models.

(a)   The Silk Road model was launched in 1994 and its aim is to use tourism as a medium to revitalize the ancient highways used by Marco Polo and the traders that succeeded him. The Silk Road stretches 12,000 kilometres from Asia to Europe and incorporates 16 countries.

(b)   The Slave Route model was initiated in 1995 and aims to boost cultural tourism to western African nations. The immediate goals of this project include restoration of monuments, improving history museums and joint marketing.

The WTO is available to assist with expert advice and will also source funding for such projects.

Because of the tremendous cultural diversity found in the SADC countries a dedicated cultural route or combined bio-diversity/cultural circuit should be considered. However, the proposed SADC route need not necessarily focus exclusively on cultural tourism – an increase in tourism resulting from increased marketing of the region will result in a spin-off increase in the consumption of cultural tourism.

6.7   An ethno-tourism specific regional coordinating body

While ethno-tourism shares many features in common with other forms of tourism, it also has unique obstacles and characteristics. It would be beneficial to all (existing as well as aspirant) players to have an industry body dedicated to ethno-tourism. The role of this body should be:

(i)   to raise awareness of the consumers regarding ethno-tourism;

(ii)   to market member products;

(iii)   provide accreditation and monitor standards of members; and

(iv)   to liaise with government regarding relevant legislation. This body would also lobby RETOSA for a greater share of the regional tourism marketing effort.

6.8   Encourage diversification

Consideration should be given to the diverse ways of attracting regional/local business. The example of Lesedi Cultural Village in South Africa illustrates important lessons:

(i)   the value of being able to change management policy in order to benefit from market opportunities; and

(ii)   the need to diversify the product in order to broaden the consumer profile.

Lesedi Cultural Village had developed a narrowly defined product consisting purely of a reconstructed rendition of cultural villages depicting five ethnic groups. Tours were offered twice per day at specified times only. The enterprise struggled from the outset and was experiencing serious financial difficulties five years after its inception. New management assumed control and encouraged diversification, including sumptuous traditional meals and, most importantly, developed new products that catered to the domestic corporate market. As a result of this diversification, the Lesedi Cultural Village appears to now be a viable concern.

6.9   Protect intellectual property rights

The oral traditions and culture of a people belong to those people and benefits derived from sale or display of this intellectual property should accrue to them. However, outsiders tend most often to exploit intellectual cultural property. This property may be general cultural history or unique ethnic heritage. It may also include specifics such as traditional medicines which may be of benefit to broader society but may also earn large amounts of money. Often those whose intellectual property is being exploited are rural, uneducated people who are naïve regarding economics and their personal rights.

There is a strong need for legislative policy to protect the intellectual property of ethnic groups in the subregion.

6.10 Incorporate pro-poor tourism strategies into tourist development policy

Both Namibia and South Africa have attempted to incorporate some pro-poor strategies into tourism policy. Criticism has been leveled at South Africa for attempting to alleviate poverty through facilitating large businesses and requiring them to provide employment and benefits for the poor (a concept known as 'planning gain'), rather than empowering the poor directly. In spite of their very clear pro-poor tourism stance, the Namibian Government has been criticized for slow implementation of policy. Namibia and South Africa need to revisit their respective pro-poor strategies for tourism and ensure that these are adequate and that delivery is occurring at a satisfactory pace. Other countries in the SADC region need to urgently examine their tourism policies and consider how they can best incorporate the needs of the poor and facilitate their entry into the tourism industry.

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- www.world-tourism.org

- www.planeta.com

- www.tourismconcern.org.uk

- www.shangana.co.za

- www.iwwn.com.na/namtour/ (for draft policy on tourism in Namibia)

- www.adventuretravel.com

- www.unesco.org/development/highlights/decade/tourism

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Annex 1

Namibia – A country with marked potential for development of the ethno-tourism sector

(1) Primary existing strengths

- Strong tourism infrastructure

- Strong tourism presence

- Marketing

- Committed government support

- Well-developed NGO support

- Government-NGO-industry cooperation

- Commitment to development of industry

- Commitment to developing community-based projects

- Political stability

(2) Primary existing weaknesses

- Ethno-tourism currently not well represented

- Decline in tourism

- Lack of relevant statistics

- Legislative obstacles: (i) entry requirements; and (ii) permission to occupy permit requirements

(3) Links of value chain to be targeted and suggested interventions.

- Beginnings

    (a) Increase awareness of the potential of the product in Namibia.

    Tour operators and communities need to be made aware of the commercial potential of their own cultural resources.

    (b) Identify potential locations and players.

    The critical factors that influence the success or failure of an ethno-tourism venture are the location of the venture and the competence of the players. Suitable locations on tourism routes, which have interesting cultures with willing players, need to be identified in order to encourage new ventures that have a great opportunity for success.

- Production

  (a) Network with existing successful products in other countries.

    Visits to successful ethno-tourism enterprises in neighbouring countries will provide an insight into the potential of ethno-tourism and the practicalities of operating such a venture. Such exchanges will also allow the visitors to learn from the errors of preceding experiments and will also generate confidence.

  (b) Train players/liaise with existing NGO's. Focus on hospitality and communication skills.

    While the knowledge required for ethno-tourism is indigenous and endemic, many players are not skilled in communicating with tourists. They lack an understanding of tourists' needs and requirements. This is a critical area for intervention. There are NGOs that specialize in hospitality training (ZIMHOST in Zimbabwe) and there are NGOs that are dedicated to liasing with and training community-based tourism ventures (NACOBTA). The basic ingredients for this intervention exist and simply require motivation.

- Circulation

  (a) Educate local tour operators and agents about the products.

    Local tour operators and agents are critical for the successful marketing of the product. It is essential that these local tour operators are aware of the existence of the products as well as the value and quality of these products. NACOBTA should be tasked with launching a domestic education programme about ethno-tourism, including educational familiarization visits for tour agents. Government may be willing to finance this exercise through the Ministry of Tourism.

  (b) Educate international travel agents and public about the products.

    For the product to be successful, marketing must extend beyond the domestic tour operators and agents to include international travel agents. The Ministry of Tourism should be encouraged to use its overseas offices for this purpose. NGOs such as ACTSA in the United Kingdom could be solicited for support.

  (c) Market the product via travel shows and the Internet.

    NACOBTA and the Ministry of Tourism should be attending international travel shows with the express purpose of educating foreign travel buyers about ethno-tourism in Namibia.

    The Internet is rapidly becoming a vital tool for travel marketing and information dispersal. The Namibian Ministry of Tourism must commission a web site dedicated to providing information and booking of ethno-tourism products in the country. NGOs involved with these products can assist with the design and maintenance of this web site.

- Delivery

  (a) Ensure quality control of products.

    Poor quality of the product has been identified as an important threat to the growth of this sector. It is essential that the quality of ethno-tourism products be established and maintained. This can be done by way of legislated requirements for licensing.

■ Audience development

(a) Encourage contributions and critiques of products by travel journalists and tour operators.

In addition to the familiarizations for tour operators and agents that was suggested above, travel journalists should be invited to visit the ethno-tourism ventures and to comment upon them.

(b) Assess consumer response and adjust product accordingly.

Feedback from tour operators, travel agents, travel writers and clients must be taken into account in adjusting the product. This feedback should be encouraged by requesting it in questionnaires and can also be obtained by reading resulting articles. The players responsible for the product must assess the significance of the feedback and whether it warrants changes in the production and delivery of the product.

Key actors and constituents

■ Department of Tourism

■ Ministry of Environment and Tourism (Namibia Tourism Development Programme)

■ CBNRM – Community-based Natural Resource Management Programme

■ NACSO – Namibian Association of CBNRM Support Organizations

■ Namibia Community-based Tourism Association

■ WIMSA – Working group for Indigenous Minorities of Southern Africa

■ FENATA – Federation of Namibian Tourism Associations.

Annex 2

Zimbabwe – A country with potential for development of the ethno-tourism sector

(1)   *Primary existing strengths*

- Strong tourism infrastructure

- Historical tourism presence

- Culture is nationally recognized as a tourist draw-card

- Country has always included ethno-tourism in marketing

- Marketing infrastructure

- Communications infrastructure

- Existing ethno-tourism products

- Ethno-tourism dominated by micro/small enterprises

- Many aspirant entrepreneurs

(2)   *Primary existing weaknesses*

- Decline in tourism

- High cost of money/unavailability of soft loans

- Lack of relevant statistics

- Legislative obstacles – entry requirements

- Absence of government support

(3)   *Links of value chain to be targeted*

- Beginnings

   (a)   Identify potential/emerging/struggling locations and players

   Intervention must be strategically targeted and should focus on existing enterprises that are well located and therefore have potential but are struggling to establish themselves because of a deficiency that can be provided.

   (b)   Increase awareness of Ministry of Tourism and Environment regarding industry value.

   The ethno-tourism sector in Zimbabwe is not recognized as an important component of the tourism industry. Like many African countries, Zimbabwe still perceives itself narrowly as a wildlife tourist destination. The Government players need to be made aware of the potential of ethno-tourism to contribute to employment and income generation as well as the other beneficial contributions that this sector may make.

   (c)   Encourage establishment of relevant NGO for training and marketing.

Although tourism is an important employer in Zimbabwe, there are very few NGOs present. There is a tendency for the Government to control all development in the country, where shared involvement with a dedicated NGO would achieve more rapid results.

(d) Assist in creation of a national/regional ethno-tourism route.

An ethno-tourism route that also incorporates other attractions such as wildlife and World Heritage Sites would make the product more attractive and would increase the ability to market ethno-tourism destinations.

■ Production

(a) Network with existing successful products in this and other countries.

Visits to successful ethno-tourism enterprises in neighbouring countries will provide an insight into the potential of ethno-tourism and the practicalities of operating such a venture. Such exchanges will also allow the visitors to learn from the errors of preceding experiments and will also generate confidence.

(b) Train players. Focus on hospitality and communication skills.

While the knowledge required for ethno-tourism is indigenous and endemic, many players are not skilled in communicating with tourists. They lack an understanding of tourists' needs and requirements. This is a critical area for intervention. The NGO, ZIMHOST, based in Zimbabwe and specializing in hospitality training, is the ideal organization to assist with this intervention.

(c) Provide financial assistance to identified players.

Within Zimbabwe there are several entrepreneurs, who have identified a niche market and possess the raw ingredients for the product, but who lack financial resources to progress any further. The cost of loaning money in Zimbabwe is prohibitively high.

■ Circulation

(a) Educate local tour operators about the products.

Local tour operators and agents are critical for the successful marketing of the product. It is essential that these local tour operators are aware of the existence of the products as well as the value and quality of these products. The ZTA should be tasked with launching a domestic education programme about ethno-tourism, including educational familiarization visits for tour agents. Government may be willing to finance this exercise through the Ministry of Tourism.

(b) Educate international travel agents and public about the products.

For the product to be successful, marketing must extend beyond the domestic tour operators and agents to include international travel agents. The Ministry of Tourism should be encouraged to use its overseas offices for this purpose. NGOs such as ACTSA in the United Kingdom could be solicited for support.

(c) Market the product via travel shows and Internet.

The Internet is rapidly becoming a vital tool for travel marketing and information dispersal. The Zimbabwean Ministry of Tourism must commission a web site dedicated to providing information and booking of ethno-tourism products in the country. The Zimbabwean Tourism Authority is already well represented at several international travel shows and should exploit this opportunity to increase awareness of the country's ethno-tourism products.

(d)   Assist identified players with marketing.

The players identified as having potential will need assistance with marketing. Marketing is a costly and specialized exercise.

■   Delivery

(a)   Ensure quality control of products.

Poor quality of the product has been identified as an important threat to the growth of this sector. It is essential that the quality of ethno-tourism products be established and maintained. This can be done by way of legislated requirements for licensing.

■   Audience development

(a)   Encourage contributions and critiques of products by travel journalists.

In addition to the familiarizations for tour operators and agents as suggested above, travel journalists should be invited to visit the ethno-tourism ventures and to comment upon them.

(b)   Assess consumer response and adjust product accordingly.

Feedback from tour operators, travel agents, travel writers and clients must be taken into account in adjusting the product. This feedback should be encouraged by requesting it in questionnaires and can also be obtained by reading resulting articles. The players responsible for the product must assess the significance of the feedback and whether it warrants changes in the production and delivery of the product.

Key actors and constituents

1.   Ministry of Environment and Tourism

2.   Zimbabwe Tourism Authority

3.   ZIMHOST

4.   CAMPFIRE (Communal Areas Management for Indigenous Resources)

Annex 3

List of interviewees

Name	Organization	Status	Country
Peta Jones	Donkey Power Teaching and consultancy	Director	RSA
Paula Morrison	KZN Wildlife	Community Conservation Coordinator	RSA
Eric Dilima	Harlem Tours	Tour operator	RSA
Enver Malley	Grassroute Tours	Tour operator	RSA
Tom Chuma	Baobab Cultural Tours	Tour operator	Zimbabwe
Rev. Maqina	Kaya Lendaba	Tour operator	RSA
Jo Pope	Robin Pope Safaris	Adviser	Zambia
Kathy and Norman Galli	Songwe Village	Ops and M. Director	Zambia
Lilian Mbengo	Vic Falls Craft Village	Tour operator	Zimbabwe
Carine Munting	Fair Trade in Tourism	Director - NGO	RSA
Kingsley Holgate	Shakaland	Cultural Director	RSA
Glenda Van Oerle	Lesedi	PR and Marketing exec	RSA
Greta Wilson	CAPTOUR	PA to director	RSA
Andee Davidson	WWF	Director	Namibia
Alice Nkomo	Mzingeli Tours	Tour operator	Zimbabwe
Graham Young	Shungu Mufu Tours	Tour operator	Zambia
Shepherd Nyaruwata	RETOSA	Executive Director	SADC
Fortune Ruzungumve	Amakhosi Arts Centre	Info Secretary and Board Secretary	Zimbabwe
Bishop Ncube	Baobab Cultural Tours	Guide	Zimbabwe
Lynn Halsted	IRDNC	Advisor	Namibia
Alois Takawira	ZTA	Regional Manager	Zimbabwe
Martin Webb Bowen	FENATA	Chairman	Namibia
Jacqui Burton	Chameleon Tours	Director	Namibia
Maxi Louis	NACOBTA	Programme Manager	Namibia

Name	Organization	Status	Country
Sophia Swiegers	MET - Namibia Directorate of Tourism	Tourism development planner	Namibia
Wouter Schalken	MET - Namibia Tourism Development Programme	Advisor	Namibia
Patricia Skyer	CBNRM	Coordinator	Namibia
Axel Thoma	WIMSA	Coordinator	Namibia
Joram /Useb	WIMSA	Assistant	Namibia
Phila Hukura	Katatura face to face tours	Former guide	Namibia
Ann Reilly	Big Game Parks	Tour operator	Swaziland
Darron Raw	Swazi Trails	Tour operator	Swaziland
Pratik Patel	Tanzania Photographic Tours	Tour operator	Tanzania
Mark Sprong	Land and Lake Safaris	Director	Malawi
Sam Botomani	Malawi Tourism Association	Director	Malawi
Ronald Kahumbe	Ministry of Tourism	Deputy Minister	Malawi
Sosten Lingwalanya	Ministry of Tourism Parks and Wildlife	Senior Tourism Planning and Development Officer	Malawi
Roberto Viviani	Tourism Marketing Authority	Marketing Liaison Manager	Seychelles
Rameshwar Tupsy	Tourism Promotion Authority	Assistant Marketing Manager	Mauritius
Vivek Raghoonundun	Tourism Promotion Authority	Director	Mauritius

Annex 4

**Relative strengths in the ethno-tourism
sector in the SADC region**

Link in v. chain	Beginnings	Production	Circulation	Delivery	Feedback
Country					
South Africa	Strong–Average	Strong–Average	Strong–Average	Strong–Average	Weak
Swaziland	Strong–Average	Strong–Average	Strong–Average	Strong–Average	Weak
Lesotho	No information				
Namibia	Strong–Average	Weak	Strong–Average	Strong–Average	Strong–Average
Botswana	Weak	Weak	Strong–Average	Strong–Average	Strong–Average
Zimbabwe	Strong–Average	Strong–Average	Strong–Average	Strong–Average	Strong–Average
Zambia	Strong–Average	Strong–Average	Weak	Strong–Average	Weak
Mozambique					
Angola					
Malawi	Weak	Weak	Weak	Weak	Weak
Tanzania	Weak	Weak	Weak	Weak	Weak
DRC					
Seychelles	Strong–Average	Strong–Average	Weak	Strong–Average	Weak
Mauritius	No information				

Legend:
- ■ Strong–Average
- ▬ Weak
- ☐ Non- existent

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Annex 5

Intellectual property, copyright and related rights and collective management of rights

Intellectual property

Intellectual property (IP) relates to the type of property that results from the creations of the human mind, the intellect. The law which protects such creations is known as intellectual property law. This is to say once an individual or an enterprise considers that he/it has made such a creation it is important to take measures to legally protect the creation. Such measures are known as acquisition of IP rights. Once IP rights are acquired the creator would have exclusive right to legally use the creation for commercial purposes (economic gains). Others can lawfully use the creation for commercial purposes only after the owner of the IP right has granted consent, usually after an agreement of some form of remuneration (usually known as royalties). The effective use of such IP rights would not only enhance the competitiveness of the holder, be it an individual, small, medium or large enterprise, it will also create opportunities that would lead to benefits that can ultimately be translated into financial gains. IP is usually divided into two branches known as "industrial property" and "copyright." Different types of IP rights can be used in order to maximize the benefits resulting from protected creations (product/work).

For more information on the existing types of IP rights visit the following web site http://www.wipo.int/sme/en/ip_business/acquire_protection.htm .

What is copyright?

Most of the creations (works) in the cultural sector/industry are protected by copyrights and other rights related to copyright generally known as "related rights" or in some cases "neighbouring rights".

When a person creates a literary, musical, scientific or artistic work, he is the owner of that work and is free to decide on its use. That person (called the "creator" or the "author" or "owner of rights") can control the destiny of the work. Copyright is a legal term describing rights given to that person for his literary and artistic works. Copyright protection covers literary works such as novels, poems, plays, reference works, newspapers, computer programs, databases, films, musical compositions; and artistic works such as paintings, drawings, photographs, sculpture; architecture; advertisements, maps and technical drawings.

The economic rights are the rights of reproduction, broadcasting, public performance, adaptation, translation, public recitation, public display, distribution, and so on. The moral rights include the author's right to object to any distortion, mutilation or other modification of his work that might be prejudicial to his honour or reputation. Both sets of rights belong to the creator who can exercise them. The exercise of rights means that he can use the work himself, can give permission to someone else to use the work or can prohibit someone else from using the work. The general principle is that copyright protected works cannot be used without the authorization of the owner of rights. Limited exceptions to this rule, however, are contained in national copyright laws. In principle, the term of protection is the creator's lifetime and a minimum of 50 years after his death.

These legal aspects are specified in international conventions to which most countries are now party. On their accession, member States should have national legislation that is in line with the international standards. At the international level, the economic and moral rights are conferred by the Berne Convention for the Protection of Literary and Artistic Works, commonly known as the "Berne Convention". This Convention, which was adopted in 1886, has been revised several times to take into account the impact of new technology on the level of protection that it provides. It is administered by the World Intellectual Property Organization (WIPO), one of the specialized international agencies of the United Nations system. Angola, Mozambique and Seychelles are the

only SADC member states which are yet to accede to the Berne Convention, though all SADC member states have national copyright legislation.

A created work is considered protected by copyright as soon as it exists. There is no formality to be complied with, such as registration or deposit, as a condition of that protection. Mere ideas in themselves are not protected, only the way in which they are expressed. According to the Berne Convention literary and artistic works are protected without any formalities in the countries party to that Convention. However, many countries have a national copyright office and some national laws allow for registration of works for the purposes of, for example, identifying and distinguishing titles of works. In certain countries, registration can also serve as prima facie evidence in a court of law with reference to disputes relating to copyright. It is important to note that ownership of copyright of a creation does not necessarily mean physical ownership of the said creation e.g. ownership of a copy of a novel does not mean ownership of the copyright of the said novel.

The 1994 Agreement on Trade-Related Aspects of Intellectual Property Rights (or TRIPS Agreement), which is administered by the World Trade Organization (WTO), as well as the WIPO Copyright Treaty (WCT) incorporate this international protection.

For more information visit the following web site:
http://www.wipo.int/treaties/ip/berne/index.html .

What are related rights?

Whereas the rights provided by copyright apply to authors, "related rights", also known as "neighbouring rights" concern other categories of owners of rights, namely, performers, the producers of phonograms and broadcasting organizations. Related rights differ from copyright in that they belong to owners regarded as intermediaries in the production, recording or diffusion of works. The link with copyright is due to the fact that the three categories of related rights owners are auxiliaries in the intellectual creation process since they lend their assistance to authors in the communication of the latter's works to the public. A musician performs a musical work written by a composer; an actor performs a role in a play written by a playwright; producers of phonograms – or more commonly "the record industry" – record and produce songs and music written by authors and composers, played by musicians or sung by performers; broadcasting organizations broadcast works and phonograms on their stations.

At the international level, related rights are conferred by the International Convention for the Protection of Performers, Producers of Phonograms and Broadcasting Organizations, better known as the "Rome Convention". This Convention was adopted in 1961 and it is jointly administered by the United Nations Educational, Scientific and Cultural Organization (UNESCO), the International Labour Organization (ILO) and WIPO. As of February 15, 2002, among SADC member states only Lesotho had acceded to this convention. However several SADC member states do have national legislation on related rights.

The basic related rights granted are, in general, the following:

–   *Performers* are provided the rights to prevent fixation (recording), broadcasting and communication to the public of their live performances without their consent, and the right to prevent reproduction of fixations of their performances under certain circumstances; the rights in respect of broadcasting and communication to the public may be in the form of equitable remuneration rather than a right to prevent. Due to personal nature of their creations, some national laws also grant performers moral rights, which may be exercised to prevent unauthorized uses of their name and image, or modifications to their performances which present them in an unfavourable light.

–   *Producers of phonograms* are granted the rights to authorize or prohibit reproduction, importation and distribution of their phonograms and copies thereof, and the right to equitable remuneration for broadcasting and communication to the public of phonograms.

–   *Broadcasting organizations* are provided the right to authorize or prohibit rebroadcasting, fixation and reproduction of their broadcast.

Also, the WIPO Performances and Phonograms Treaty (WPPT) grants protection to the performers in sound performances and producers of phonograms, particularly in the digital environment.

Though the duration of protection of related rights may differ from country to country the minimum period provided by the Rome Convention is twenty years. However the WTO agreement on Trade Related Aspects of Intellectual Property Rights (TRIPS) and the WPPT provide 50 years of protection to the rights of performers and producers of phonograms.

The 1994 Agreement on Trade-Related Aspects of Intellectual Property Rights (or TRIPS Agreement), which is administered by the World Trade Organization (WTO), incorporates or refers to this international protection.

For more information visit the following web site:
http://www.wipo.int/treaties/ip/rome/index.html .

Collective management of rights

The exclusive right of the author to exploit his work or authorize others to do so is the basic element of copyright, and such a right, where recognized, is also important for the beneficiaries of related rights. An exclusive right can be enjoyed to the fullest extent if it may be exercised individually by the owner of the right himself. In such a case, the owner maintains his control over the dissemination of his work, can personally take decisions on the economic conditions of its exploitation and can also closely monitor whether his rights are duly respected. As early as at the time of the establishment of the international copyright system, there were, however, certain rights that their owners were unable to exercise individually, and later, with the ever newer waves of new technologies, the field in which individual exercise of rights was impossible or, at least, impractical, became constantly wider.

The reason for which, in a number of cases, copyright and related rights cannot be exercised individually is that the works and/or the objects of related rights are used by a great number of different users. An individual author or other rights holders, in general, does not have the capacity to monitor all the uses, to negotiate with users and to collect remuneration. In such a case, collective management of rights is the appropriate solution. It is obviously a great advantage also for users since it decreases their administrative costs and facilitates lawful use. The importance of collective management societies is crucial especially where they provide "one stop shop" services, a coordinated collective management of all relevant rights, established on a global basis. These can go as far as the organization of public awareness campaigns, training and providing legal advice and assistance on issues such as the signing of contracts between the owners of copyright and related rights works and users of such works, where implications of intellectual property must be taken into account.

Given the importance of this aspect of the protection of copyright and related rights, a new WIPO guide on "Collective Administration of Copyright and Related Rights" is under preparation and will be published soon. It describes the main fields of collective management, analyses the most important issues of this form of exercising rights, including the digital environment and offers some basic principles for the establishment and operation of collective management organizations.

All of the SADC member states except for Angola, Botswana, Lesotho, Seychelles and Swaziland have copyright societies. Namibia, South Africa, Zambia and Zimbabwe have private copyright collecting societies, while the rest have either parastatals or State-funded societies. In most cases, the "parastatal" collective management societies have dual responsibility i.e. that of administering the economic rights of their members but also that of enforcing the provisions contained in the national legislation e.g. in Malawi, Mauritius and Tanzania.

For more information visit the following web site: http://www.wipo.int/africa/en/.

Annex 6

National copyright offices in the SADC region

Angola

Ministry of Culture
National Institute for Cultural Industries (INIC)
National Directorate of Entertainment and Copyright

Address: Rua Civilo de Conceição 72 andar
            Luanda

Mailing address: Caixa Postal 1252
            Luanda

Telephone: (244 2) 33 13 71
Telefax: (244 2) 33 13 62

Last information communicated: January 2001

Botswana

Ministry of Commerce and Industry
Department of the Registrar of Companies
Business Names, Trade Marks, Patents and Designs

Address: P.O. Box 102
            Gaborone

Telephone: (267) 580 754
Telefax: (267) 371 539; 580 987
Telex: 2674 TRADE BD
email address: roc.mci@gov.bw

Last information communicated: October 2001

Democratic Republic of Congo

Ministry of Culture and the Arts
Directorate of Research, Planning and International Cultural Relations
Secretariat General of Culture

Address: B.P. 3090
            Kinshasa I

Last information communicated: June 1997

Lesotho

Office of the Registrar General
Copyright Office

Address: P.O. Box 52
            Maseru 100

Telephone: (266) 31 30 34
Telefax: (266) 31 01 94
Telex: 4228 SADCTU LO

Last information communicated: January 2002

Malawi

Ministry of Sports and Culture
Copyright Society of Malawi (COSOMA)

Address: P.O. Box 30784
            Lilongwe 3

Telephone: (265) 751 148; cellphone: 865 211
Telefax: (265) 752 717
email address: cosoma@sdnp.org.mw

Last information communicated: January 2001

Mauritius

Ministry of Arts and Culture
(Mauritius Society of Authors (MASA))

Address: 7th Floor
            R. Seeneevassen Building
            Maillard Street
            Port Louis
            Mauritius

Telephone: (230) 212 5848
Telefax: (230) 212 9366
email address: copyrightsoc@intnet.mu

Last information communicated: February 2002

Mozambique

Ministry of Culture and Sports
National Institute of Book and Records
Department of Copyright

Address: Av. 24 de Julho 1921
            Maputo

Mailing address: P.O. Box 4030
                    Maputo

Telephone: (258 1) 42 02 57; 42 03 73
Telefax: (258 1) 42 02 09

Last information communicated: January 2001

Namibia

Ministry of Information and Broadcasting
Copyright Services

Address: Government Offices
            Provost Building
            Windhoek

Mailing address: Private Bag 13344
                    Windhoek, 9000

Telephone: (264 61) 22 22 46; 22 10 77
Telefax: (264 61) 22 49 37
Telex: 665

Last information communicated: December 1994

Seychelles

Ministry of Youth and Culture

Address: Ministry of Youth and Culture
           PO Box 1383
           Victoria
           Mahe

Telephone: (248) 321 333
Telefax: (248) 322 113
Telex: 2305 MINED SZ

Last information communicated: January 2000

South Africa

Department of Trade and Industry
Office of the Registrar of Patents, Trade Marks, Designs and Copyright

Address: Private Bag X400
           Pretoria 0001

Mailing address::   Zanza Buildings
                    116 Proes Street
                    Pretoria 0001

Telephone: (27 12) 310 8700
Telefax: (27 12) 323 4257
Telex: (9) 35-0168 TRIN
email address: mcdonaldn@dti.pwv.gov.za

Last information communicated: November 2001

Swaziland

Ministry of Justice
Registrar General's Office

Address: 3rd Floor Justice Building
           Mbabane

Mailing address::   P.O. Box 460
                    Mbabane

Telephone: (268 40) 46 010/9
Telefax: (268 40) 43 531

Last information communicated: February 2000

United Republic of Tanzania

Copyright Society of Tanzania (COSOTA)
Business Registrations and Licensing Agency (BRELA)
Ministry of Industry and Trade

Address: Co-operative Bldg.
           Lumumba Street
           Dar es Salaam

Mailing address: P.O. Box 9393
                   Dar es Salaam

Telephone: (255 22) 812 760839 (Mobitel)
Direct lines: (255 22) 2180048; 2180139; (255 22) 2180141
Telefax: (255 22) 2180371; 2184727
Telex: 41689 INDIS TZ
email address: usajili@intafrica.com

Last information communicated: February 2001

Zambia

Ministry of Information and Broadcasting Services
Copyright Administration

Address: P.O. Box 51025
           Lusaka

Telephone: (260 1) 25 17 73; 25 17 66
Telefax: (260 1) 25 34 56; 25 34 57; (260 1) 25 17 67
Telex: 40113 INFORM ZA

Last information communicated: February 2002

Zimbabwe

Ministry of Justice, Legal and Parliamentary Affairs
Office of the Controller of Patents, Trade Marks and Industrial Designs

Address: Private Bag 7704
           Causeway
           5th Floor Forner House
           Corner Leopold Takawira Street and Samora Machel Avenue
           Harare

Telephone: (263 4) 775 544/6; (263 4) 773 443; (263 4) 781 835
Telefax: (263 4) 772 999; 772 993
email address: zimpat@gta.gov.zw

Last information communicated: February 2002

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