

**REPUBLIC OF RWANDA**



**MINISTRY OF TRADE AND INDUSTRY**

## **Rwanda Tourism Policy**

Kigali, November 2009

# Contents

<b>Contents</b>	<b>2</b>
<b>1. Issue</b>	<b>3</b>
<b>2. Context</b>	<b>3</b>
2.1 The international and regional tourism market	3
2.2 Rwandan tourism as key to export revenue and investment	4
2.3 Tourism contribution to Vision 2020	5
<b>3. Vision and objectives</b>	<b>5</b>
3.1 Vision	5
3.2. Objectives	5
3.3 Targets	6
<b>4. Analysis</b>	<b>6</b>
<b>5. Preferred option</b>	<b>10</b>
5.1 Product development and diversification	10
5.2 Marketing and awareness of Rwandan tourism	11
5.3 Capacity building and developing human resources	12
5.4 Small, medium and micro enterprise (SMME) and community development	14
5.5 Access to Rwanda as a destination	15
5.6 Framework for regulation of the industry	16
5.7 Infrastructure development	16
5.8 Land access and tenure	17
5.9 Environmental sustainability	18
5.10 Quality investment and financing	19
<b>6. Stakeholder views</b>	<b>20</b>
<b>7. Implementation plan</b>	<b>22</b>
<b>8. Financial implications</b>	<b>22</b>
<b>9. Legal implications</b>	<b>23</b>
<b>10. Impact on business</b>	<b>23</b>
<b>11. Impact on equality, unity and reconciliation</b>	<b>23</b>
<b>12. Handling plan (communication plan)</b>	<b>24</b>
<b>Annex 1: Roles of key players in the tourism industry</b>	<b>25</b>
<b>Annex 2: Detailed implementation framework</b>	<b>30</b>

## 1. Issue

Tourism has been identified as a priority sector to achieve Rwanda's development goals as set out in Vision 2020. With the application of previous tourism policies, the country has been able to make significant progress in developing and managing its tourism sector in recent years. In 2008, the number of foreign visitors to Rwanda reached just under one million from about 826,000 in 2007, an increase of 30 per cent. Estimates indicate that tourism revenues significantly increased between 2007 and 2008, from \$138 million to \$209 million.

However, this notable and very fast pace of development of the sector has necessitated a review of the existing tourism policy as well as the creation of an aligned sustainable tourism master plan. Together these documents aim to bring order to the industry with new legislations and improved coordination, as well as to stimulate investment and increase private sector involvement.

Specifically, they aim to address a number of constraints and issues that face the tourism industry:

- Over-reliance on a single tourism product
- International awareness and perceptions of Rwanda not widely based on tourism
- Low capacity and under-skilled human resources
- Little involvement of communities and micro, small and medium enterprises (MSMEs) in the sector
- Expensive and difficult to access from key tourism source markets as a destination
- Under-developed regulatory framework for the tourism sector
- Constraints due to quality and quantity of infrastructure
- Difficulty of accessing land for tourism investments
- Little focus on the environment and sustainability
- Low availability of finance and partnership for private sector investment in the sector

## 2. Context

### *2.1 The international and regional tourism market*

Tourism constitutes about 6 per cent of global goods and services exports, and about 30 per cent of global service exports alone. In 2007, there were over 900 million international tourist arrivals bringing receipts of \$856 billion<sup>1</sup>. Africa had a 5 per cent share of these arrivals at just over 44 million arrivals generating \$28 billion in receipts.

Rwanda is part of the East African regional market. This market receives around a quarter of sub-Saharan African tourism receipts when South Africa is excluded, with tourism revenues at

---

<sup>1</sup> UNWTO World Tourism Barometer - <http://www.unwto.org/facts/eng/barometer.htm>

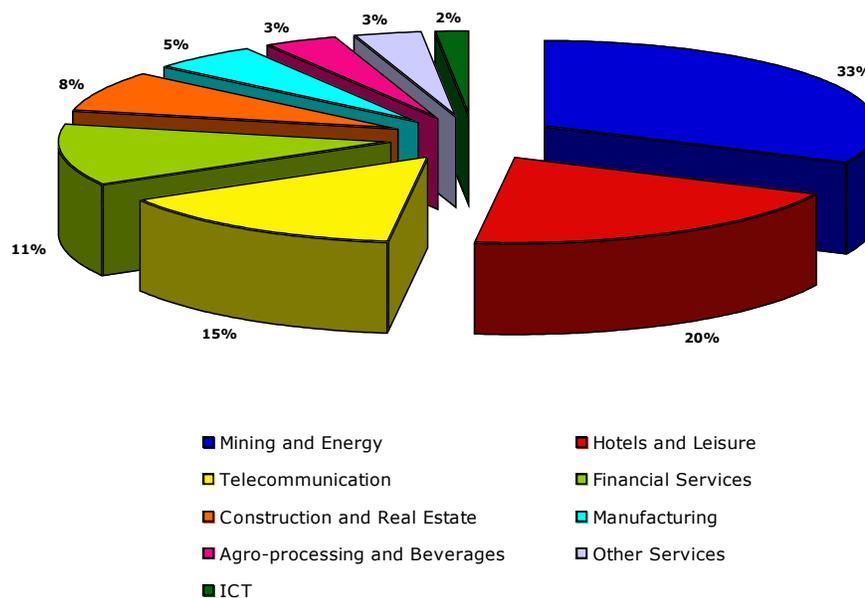
around \$1 billion in Kenya in 2007<sup>2</sup> (accounting for around 10 per cent of Kenya’s GDP), close to \$1 billion of revenues in Tanzania<sup>3</sup> and just under \$500 million in Uganda<sup>4</sup>.

## 2.2 Rwandan tourism as key to export revenue and investment

Rwanda’s tourism industry accounts for a significant portion of foreign revenue. Current estimates for tourism revenue in 2007 and 2008 make up almost as much as the entire export base - \$209 million in 2008 compared to \$262 million for official exports. This makes the industry very important for Rwanda’s macroeconomic stability and prospects of economic growth<sup>5</sup>.

Furthermore, as Figure 1 shows, between 2000 and 2009, 20 per cent or 258 billion Rwf of foreign direct investment (FDI) went into the hotels and leisure sector, commensurate with the tourism industry. Local investment was also significant in tourism, with 140 billion Rwf or 16 per cent of total local investment between 2000 and 2009 going to hotels, restaurants and tourism. Again, this contribution of the sector to investment, totalling approximately \$700 million in a ten-year period demonstrates the large role the tourism industry is now playing in the Rwandan economy.

Figure 1: FDI into Rwanda by sector of the economy (2000-2009)<sup>6</sup>



<sup>2</sup> [http://www.tourism.go.ke/ministry.nsf/pages/facts\\_figures](http://www.tourism.go.ke/ministry.nsf/pages/facts_figures)

<sup>3</sup> <http://www.eturbonews.com/782/weeklong-political-stalemate-ends-kenya-east-african-tourism-getting-normal>

<sup>4</sup> <http://www.eturbonews.com/8388/dar-lose-tourism-market-share-kenya-and-uganda>

<sup>5</sup> The methodology for calculating tourism receipts in Rwanda underwent significant change in 2008 due to the new availability of arrivals statistics. This methodology is also likely to change again in the coming years as new and better data becomes available.

<sup>6</sup> RDB registered investments

### ***2.3 Tourism contribution to Vision 2020***

It is envisaged that this new tourism policy will increase revenue figures even further, contributing to tax revenue, boosting the balance of payments, and contributing to the sustainable economic growth and equitable distribution of wealth for the benefit of all Rwandans. This should be balanced with conservation of the environment and support for society and culture. This Policy comes in to replace the 2006 Tourism Policy.

This Rwanda Tourism Policy will contribute to the attainment of Vision 2020 objectives and EDPRS targets, through job creation, strengthening professional competencies, local community participation in the development of the sector for their own benefit, improved use of information and communication technology, rational use of existing physical infrastructure and development of new infrastructure, strengthening public–private sector partnerships, and the diversification of sustainable tourism products.

This policy document is drafted within the context of the 2009 Sustainable Tourism Master Plan and will concentrate on addressing these issues within the sector.

## **3. Vision and objectives**

### ***3.1 Vision***

*Through well-managed marketing, development and public-private partnerships, Rwanda will become established as a leading wildlife and eco-tourism destination and a regional conference hub, with a high quality, diversified tourism product that makes a growing contribution to the overall socio-economic development of the country.*

### ***3.2. Objectives***

The overall objective of the Tourism Policy is to increase tourism revenues in a sustainable manner, generate profits for reinvestment and create jobs. This will be done by developing new and distinctive, market-led products that are clearly positioned and promoted in the marketplace. They will bring spatial and socio-economic balance to the distribution of tourism benefits. For Rwanda, sustainable development incorporates environmental, social and economic elements.

The following strategic objectives will be achieved through the implementation of the 2009 Sustainable Tourism Development Master Plan for Rwanda.

To sustainably increase tourism in Rwanda these objectives include:

- **Product development and diversification** – Develop a range of quality tourism products and services, capable of attracting and meeting the needs of international, regional and domestic visitors.
- **Marketing and awareness** – Project a clear, distinctive, image of Rwanda as a wildlife, eco-tourism, cultural and conference destination that is attractive to a high-value market.
- **Capacity building** – Develop systematic, high quality training, to create a skilled workforce in value jobs at every level of the tourism and hospitality industry.

- **Communities and MSMEs** – Provide support to MSMEs, ensuring that they have the capabilities and capacities to enter the tourism value chain, while also ensuring that communities contribute to and benefit from the tourism industry.
- **Access to Rwanda as a destination** – Ensure that international tourists have minimal hassle in their journey to Rwanda in terms of air and land access, as well as in Visa and other requirements.
- **Framework of regulation** – Establish and maintain regulation that enables the tourism industry to develop in a fast yet sustainable manner.
- **Infrastructure development** – Prioritise the provision of infrastructure within the Destination Management Areas (DMAs) and their associated corridors.
- **Land** – Enable tourism investments through ensuring the availability and security of land tenure for development.
- **Environmental sustainability** – Ensure that the tourism sector is planned and developed to the benefit of future generations of Rwandans, in terms of the sustainability of resource use, the protection of wildlife and the environment.
- **Investment and financing** – Develop incentives and a financial architecture that supports investment in the tourism industry.

### 3.3 Targets

In the future, the primary measurement of success in the international tourism sector will be based on international tourism revenue. The accurate measurement of tourism revenue will be improved by seeking the cooperation of key stakeholders, and by conducting regular quantitative and qualitative visitor surveys. The tables below indicate the tourism sector targets in terms of revenue and number of arrivals. Table 1 indicated total arrivals and revenues while Table 2 looks at the Leisure and Business segment.

*Table 1: Tourism targets for Rwanda 2009-2020*

	2008 (actual)	2009	2010	2011	2012	2020
<b>Revenue</b>	\$210m	\$210m	\$225m	\$244m	\$277m	\$627m
<b>Number of Arrivals</b>	980,000	980,000	1,031,000	1,089,000	1,199,000	2,219,000

*Table 2: Tourism leisure and business Targets for Rwanda 2009-2020*

	2008 (actual)	2009	2010	2011	2012	2020
<b>Revenue</b>	\$178,5M	\$178,5M	\$192M	\$210M	\$251M	\$624M
<b>Number of Arrivals</b>	407,000	431,000	460,448	541,000	545,000	1,262,000

*These statistics are provisional. It may be subject to change as the system of collection of tourism statistics is improved further.*

## **4. Analysis**

This Policy is structured around the issues identified in Section 1. They form the objectives for the Policy and provide the structure for implementation. This section provides analysis of the key issues individually.

### ***4.1 Product development and diversification***

Over the years, there has been a dependency on the gorilla product as a major source of tourism revenue, and over 90 per cent of the industry's earnings are driven by gorilla tours. Whilst recognising the importance of this iconic product, much effort is needed on diversifying the industry to include a wide range of other products. This diversification may consider strengthening Meetings, Incentives, Conferences and Exhibitions (MICE) tourism, birding, culture, agro-tourism, adventure products and others, in relation to the market demand and the resource base of Rwanda.

According to recent research by RDB and SNV<sup>7</sup> the most frequent length of stay for international visitors in Rwanda is four days. Rwanda is seen as an add-on to an East African safari tour, principally to visit the gorillas. The availability of high quality alternatives to the gorilla product will be essential to ensure these visitors decide to stay longer. For example, currently only 11 per cent of international visitors go to chimpanzee trekking in Nyungwe National Park, 6 per cent experienced mountain biking, compared to 65 per cent who visit the genocide memorial centre<sup>8</sup>. The frequency of visitors experiencing alternative products is key to the long run development of the industry.

The present economic crisis has affected all major tourist producing countries, and will result in intense competition which will lead in at best a static or at worst a decreasing market. Value for money is the important consideration for visitors. Holidaymakers will not come to Rwanda if they find it expensive or, more importantly, believe it to be poor value for money. Quality that ensures value for money (rather than price) is the cornerstone to visitor satisfaction, particularly for the discerning higher spending tourist. At the present time, value for money is not perceived as a strength of Rwanda's tourism sector. This is a key challenge facing Rwanda tourist enterprises that will need to become increasingly competitive in value for money through the cost control of inputs, the quality of services and facilities and innovation. In order to enforce that tourists get value-for-money services, the tourism associations in collaboration with government should develop industrial specific codes of conduct that should be adhered to by association members.

### ***4.2 Marketing and awareness***

Although the image of the country has considerably improved in the recent past, the country is not well known in the key tourism source markets. Despite the current stability, safety and security of the country, the civil unrest of 1994 still underlies dominant perceptions people have in source markets. Rwanda needs to become more visible as a tourism destination, by providing information about the tourism attractions, products and services, and making it a competitive

---

<sup>7</sup> RDB and SNV, Tourism Market Research for Rwanda 2009: A survey of tourists, tour operators and accommodation. 21 August 2009

<sup>8</sup> Ibid.

destination for tourists and tourism operators. The private sector needs to put in place a tourism marketing levy fund which will be also supported by government.

The travel trade and the web are recognised as the most cost-effective means of reaching the potential visitor and will be the principal channels of distribution in international and regional markets. Editorial publicity and word-of-mouth recommendation are also recognised as more effective and cost-efficient than advertising. Rwanda must utilise these channels to good effect.

With the rise of e-commerce globally, it is important for Rwanda to have the capacity to provide tourism information, secure bookings and accept payments online. Use of international credit and debit cards at Rwandan ATMs and businesses is currently limited and should also be made possible. The focus should not only be on European and American markets, but also on travellers from Asia, the rest of Africa and also domestic travel by Rwandan residents.

### ***4.3 Capacity building and developing human resources***

There is an acute shortage of trained manpower in Rwanda and the hospitality sector is no exception. The approach and implementation of capacity building and the development of human resources has so far been fragmented. The quality of tourism professionals, including hotel employees, guides, waiters and other key personnel is inconsistent and below par when compared with regional competitors. According to research by IPAR, more than 80 per cent of those who have experienced customer service in Kenya say it is better than in Rwanda<sup>9</sup>.

The training facilities currently operated have poor equipment, limited books and internet, inconsistent curricula, and a lack of qualified staff. Tourism is a people-to-people activity where human interaction plays an important role. For any tourism destination to emerge as an important stop on the itinerary of the international tourist, the human factor and the quality of service is very important. Capacity building is also needed at all levels of government on tourism including local administrations, and also in destination-level communities.

### ***4.4 Small, medium and micro enterprise (SMME) and community development***

Although registering a business has become easier for entrepreneurs recently, particular difficulties still relate to the financing, management, and commercial viability of the companies in the long term. There is a need to support the development of viable SMMEs that meet the needs of the market, and operate with quality standards in a sustainable way. Greater understanding of tourism supply chains is needed, and mechanisms to stimulate growth in tourism and related businesses in response to demand.

Tourism should also be developed to value, invest in and develop local cultures and protect them from over-commercialisation and over-exploitation. Local communities will also have a responsibility to become actively involved in the tourism industry, to practice sustainable development and to ensure the safety and security of the visitors. Effectively, a pro-poor approach will be taken, to ensure that tourism results in increased net benefits for poor people.

### ***4.5 Access to Rwanda as a destination***

Despite increased regional connections to neighbouring countries and South Africa, Rwanda still has limited airlift from her main tourism source markets of North America, Europe and Asia. To

---

<sup>9</sup> IPAR, Examining Rwanda's culture of mediocrity. 2009.

improve capacity and access from these key source markets, a more pro-active approach to the airlines serving Rwanda and other airlines will have to be taken in an effort to increase the number of flights and extent of connectivity. Currently the cost of flights to Rwanda is expensive when compared with other competing destinations, and this should be addressed.

Direct flights from Europe have previously been operating two times a week (though this has now increased to four times), from North America tourists must go through Europe or South Africa, and from countries such as Japan in Asia flights can change three or four times before reaching Rwanda. This inconvenience to tourists is likely to put them off visiting Rwanda when there are alternative destinations to visit.

#### ***4.6 Framework for regulation of the industry***

It is vital that the tourism industry develops in an orderly manner to ensure that the services provided are regulated for the protection of tourists, the public, the private sector, and the state.

Hotels in Rwanda have been developed at a lower standard, while charging higher prices than would be expected by visitors to our neighbouring countries. A system of classification is required in order to promote and provide incentives for better quality of service provision.

Regulation is also required to ensure that construction is sustainable and that when operational, tourist facilities operate in an environmentally sound manner.

#### ***4.7 Infrastructure development***

As with all other industries, tourism requires basic infrastructure to function. Whether the supply of electricity or water, telecommunications or waste services, tourism developments require a set of utilities in order to function properly. Furthermore, tourists travelling around Rwanda should expect a quality of roads as well as of transport provision to take them speedily and comfortably to their destinations.

Infrastructure development in Rwanda is led by the Ministry of Infrastructure (MININFRA). RDB and MINICOM should ensure that there is co-ordination with MININFRA in the development of infrastructure that impacts on the tourism industry. This requires the spread of infrastructure to create and complete tourist circuits (including roads, ports, airports etc.). With this supporting infrastructure, people will be encouraged to travel further, for longer, and more often around the country.

#### ***4.8 Land access and tenure***

Land is extremely scarce in Rwanda and so understandably there are differences in interests in how it should be distributed. Land in Rwanda is now privately owned by the people, and the majority of Rwanda's tourism products are land-based. A framework to facilitate and guide access to land by tourism investors is needed, for land both within and outside protected areas. Land tenure security and land rights for all stakeholders need to be clarified and strengthened to facilitate investment.

#### ***4.9 Environmental sustainability***

This policy proposes sustainable tourism as the key guiding principle for tourism development, to ensure environmental, social and economic sustainability. This implies a proactive approach by tourism industry partners to develop, market and manage the tourism industry in a responsible

manner so as to create a competitive advantage. Sustainable tourism implies tourism industry responsibility to the environment through the promotion of balanced and sustainable tourism and focus on the development of environmentally-based tourism activities (e.g. game-viewing).

It also aims to use local resources sustainably and avoid waste and over-consumption. This means responsibility of government and business to involve the local communities that are in close proximity to the tourism plant and attractions through the development of meaningful economic linkages (e.g. the supply of agricultural produce to the lodges, out-sourcing of laundry, etc.).

#### ***4.10 Quality investment and financing***

There is a need for effective capital investment support, financial and other incentives for product development. There is also a need to establish and nurture cooperative trade networks, and support business development. Emphasis is needed on investment and financing that is able to develop and promote quality and sustainable tourism products, minimize revenue leakage, and provide significant beneficial impact to local communities.

## **5. Preferred option**

### ***5.1 Product development and diversification***

The current reliance of Rwanda on the gorilla product is an impediment to tourism growth because of its restricted carrying capacity and the potential susceptibility to eradication through illness or other catastrophe befalling the gorillas. This Policy together with the Sustainable Tourism Master Plan aim to focus efforts on key locations or ‘Destination Management Areas’ (DMAs); these DMAs are the following locations in Rwanda:

- Kigali Hub
- Volcanoes National Park
- Nyungwe National Park
- Akagera National Park
- Karongi
- Rubavu
- Muhazi

Rwanda’s product base must be expanded through the development and upgrading of the strengths of the Rwanda’s product by clustering development around the DMAs with flagship visitor attractions. This will include:

- Continuing to promote primate viewing as the iconic product complemented by a range of nature, wildlife, adventure, activity and cultural products.
- The creation of tourism corridors (spokes) that provide linkages between Kigali (hub) and the DMAs and which will be enhanced by the development of community and culture based tourism products.

- Creating Destination Management Organisations to help coordinate and promote tourism in the area.
- The provision of effective programmes of capital investment support across heritage and cultural attractions, soft adventure activities and relevant tourism infrastructure.
- The promulgation of financial and other incentives to encourage and support new product development/service improvement within the industry as well as the accessing, capture and dissemination of market and competitor data and information to inform and influence investment decisions within tourism enterprises.
- Development of conference and convention and meeting facilities, to cater for Rwandan and Central and East African corporations.
- The provision of specific funding/assistance for attracting and promoting a calendar of sports, cultural or other large events of significant visitor or international media appeal.
- Development of a concessions strategy, to stimulate and provide guidance for the development of public-private partnerships, including guidance on tender processes; contract management and exit strategies; stakeholder rights, responsibilities and accountability; revenue sharing; and planning gain for sustainable investments that conserve the environment, reduce poverty, and enhance local culture and society.
- Promotion of products that project and enhance the country's people, culture and rich history. Specifically encouraged will be showcasing the rich history of the Kingdom of Rwanda, the conflict resolution success following the genocide of 1994, the development and promotion of festivals and cultural events leading to an annual calendar of culture and festivals, handicraft production, displays and sales combined in outlets that project the production skills and crafts to the intending purchaser, and community tourism initiatives.
- Ensure that value for money rather than price, becomes the central driver of performance for the tourism industry. Exit and other visitor surveys will be used to monitor "value for money" visitor satisfaction levels.

## ***5.2 Marketing and awareness of Rwandan tourism***

Marketing and awareness-raising are central pillars of the Tourism Policy and Masterplan. Policy must aim to intelligently promote Rwanda as a destination in key target markets. This will involve the following key activities:

- **Market Research and statistics** are critical components of the marketing mix. An extensive programme of market research in Rwanda's primary source markets is an essential first step to identify the needs, expectations and concerns, as well as buying behaviour of visitors. Rwanda needs to develop accurate and timely statistics, particularly on visitor spending and activities -this is currently lacking. Accurate information can also be used as a marketing tool in itself and is likely to be a key factor in attracting foreign direct investment (FDI) into the sector.
- **Marketing activities** will then focus on promoting Rwanda as a destination for responsible tourists, to create awareness of Rwanda amongst the travel trade in key target

markets and to use the full potential of the Internet to inform and motivate the customer. The policy will also be used to counter the current lack of knowledge and negative perceptions of Rwanda with an up-beat presentation of what the country has to offer as a tourism destination.

- **Advertising** will be used in partnership with commercial providers, focusing on select publications in international markets as well as weekly newspapers and magazines in domestic and regional markets.
- **Professional market-based representation** is recognised as essential for continuous promotion of Rwanda in key target markets. It will be policy to appoint them in key high-value markets to organise regular promotional and sales events aimed at the travel trade and consumers.
- **The brand development policy** will create a distinctive image and present a new tourism positioning for Rwanda. The brand will be designed to highlight Rwanda's competitive advantages in the areas of wildlife/eco-tourism, activity and adventure travel, and conference and business tourism.
- **An Internet portal** that is state-of-the-art will be developed, in various languages, as the sector's key communication tool. The website design will reflect the new branding for Rwanda tourism. It will be e-commerce enabled to allow financial transactions to be made for bookings.
- **ATMs** within Rwanda will be enabled to accept international credit and debit cards.
- **Improved information** will be provided on tourism products and services offered within national parks by RDB. This will include information within brochures and on the internet on tourist maps, accommodation, attractions, tours, prices, equipment, duration, guides and support services.
- **An online photo library** will be available to the international travel media and travel trade.
- **Creation of a Rwanda Convention Bureau** and marketing initiatives will be put in place with a view to establishing Rwanda as the conference and business hub of the Central and East Africa Region.
- **Participation in international trade fairs** will be done with the participation of private sector operators. SMMEs will be encouraged to attend and support will be given to ensure they make the most use of events, to increase their market linkages.

### ***5.3 Capacity building and developing human resources***

The long-term goal of the capacity building and human resource development approach is to ensure that Rwanda's training system will be responsive to the ever-changing needs of the tourism and hospitality industry. The training system will broaden the options of school leavers and those already in employment. It will attract mature Rwandans back to study and training, and provide them with specialised skills and pathways to new careers in the tourism, hospitality and services sectors.

This policy will support key recommendations of the 2009 Sustainable Tourism Masterplan, namely by:

- Establishing a Human Resources Development Advisory Council to ensure private sector industry input to policy, curricula development and implementation.
- Establishing an HRD section within the Rwanda Development Board (RDB), advised and monitored by the HRD Advisory Council, with the principal objective of researching training needs and coordinating their provision.
- Concentrating on 'Train-the-Trainer' programmes - providing crash courses for 6-8 trainers in different tourism related areas who can train local trainers. This 'Train-the-Trainer' programme should not only be limited to technical cadres working in the industry but should also be extended to owner and managers of the enterprises.
- Updating and improving the curriculum of existing travel and tourism related training courses and improving qualifications of teaching staff through an extensive train-the-trainer programme.
- Setting up a Tourism and Hospitality Training Institute in Kigali. The Institute must collaborate with the industry and have an exchange programme under which faculty and people with practical experience can interchange positions.
- Developing flexible pathways from vocational skills training into higher education diploma and degree programmes in tourism and hospitality studies;
- Providing a range of vocational training options including apprenticeship courses in accommodation operations, tourism and travel operations and catering operations;
- Providing training that delivers employable skills to a developing industry where graduates can have reasonable expectation of employment in quality jobs;
- Providing a range of professional education options that will permit tourism and hospitality students to develop as specialists within the sector.
- A national tour guiding, F and B and waiters/waitress skills training programme will be developed for existing and potential tour guides, F and B and waiters/waitress through an external international technical assistance project. Elements from existing programs within Africa may be used as a model.
- RDB and the private sector developing tour guide training programmes as part of the formal tourism training programmes at the proposed Tourism Training Institute by integrating the specific tour guiding skills in the curricula according to international standards.
- Establishing registration and licensing of guides meeting a minimum standard, and a career progression and continual training program. General guide courses will be available, in addition to those on specific products (e.g. birding, primates, culture, history etc.) and locations (e.g. different protected areas, cultural attractions).
- Providing training to RDB Tourism staff and ensuring that the structure and management is in place to become a centre of excellence for tourism.

- Introducing Tourism and nature Conservation needs in the national education curriculum at all levels of the training programmes.

#### ***5.4 Small, medium and micro enterprise (SMME) and community development***

Most enterprises in the tourism sector are small, medium and micro enterprises (SMMEs). For smaller tourism businesses, trying to bring their product to the marketplace can be a very daunting prospect, particularly so when such small businesses seek to compete in international markets. Furthermore to achieve a wider spread of the economic benefits from tourism, especially with regard to the rural sector, Community-Based Tourism (CBT) needs to be given a more demand-led approach to raise their economic viability.

This Policy targets support at viable SMMEs, offering marketable tourism products and services that meet essential quality standards, as well as aiming to promote CBT. The key elements will include:

- Support services to improve the “market readiness” of tourism enterprises and to raise their visibility in appropriate trade and media contexts;
- Support for tourism enterprises in developing effective marketing tools and action to bring their product to the market;
- Support for tourism enterprises in developing an effective e-business capability and a functioning capacity to present and trade their services on the Internet;
- Strengthening business and management capability at the level of the individual enterprise;
- Forming a group of successful local business people to act, on a voluntary basis, as business mentors to tourism SMMEs, especially community based tourism enterprises, each mentor being matched to one or more enterprise;
- Improving market linkages between SMMEs and larger enterprises, to ensure their active participation in the tourism supply and value chains;
- Improving access to market intelligence on market demand and supply in tourism and support service sectors (including food and drink, laundry, transport, maintenance etc.);
- Improving access to finance for SMMEs, in relation to viable business plans;
- Educating and sensitising communities to appreciate and value of the benefits and opportunity costs of tourism;
- Supporting community revenue-sharing projects and community management in tourism programmes;
- Promoting the values, rights, traditions and customs of local communities to investors and developers as cultural assets to respect and conserve;
- Encouraging investors and concessionaires to commit to local procurement of goods and services from local SMMEs to reduce leakages;
- Ensuring equitable access to employment, training and advancement opportunities in tourism for local communities;

- Encouraging development of market-related community based tourism enterprises (CBTEs), where self-selecting groups of community members are involved;
- Providing guidelines for good governance systems within CBTEs will be developed to ensure transparency and accountability of the parties;
- Siting CBT initiatives at key strategic locations i.e. at or near major tourism flows, along the link corridors to/from the main DMAs, as well as improving the signage for CBT sites;
- Improving the merchandising of CBT products (such as handicrafts, food and beverages), expanding the product range where necessary;
- Introducing and organising a mentoring service by RDB using successful Rwandan business people for CBT projects.

### ***5.5 Access to Rwanda as a destination***

Access is recognised as a critical determinant of international demand for a tourist destination. Low-cost and convenient access is becoming an increasingly important factor in decision-making on holiday destinations.

Point of entry and point of departure impressions produce positive or negative reactions that are broadcast to other potential tourists forming part of the “Brand Rwanda”.

Frontier crossings, customs and visa facilitation must not provide any competitive disadvantages for Rwanda. Immigration and customs authorities will ensure, through training and practices, that visitors are welcomed on arrival, processed efficiently and, on departure, thanked for coming. The positive image projected by the immigration officers in Kigali airport must be maintained and built on.

Entry requirement for nationals of Rwanda’s principal market producing countries will, where possible, be visa free. Where visas are required the procedure and cost will not be a deterrent. Towards this end tourist and business visas:

- will be granted on arrival without prior application or letters of invitation;
- fees will be nominal.

Visa information on the websites will be specific as to various visa requirements and fees by type of visa and nationality of the applicant.

Rwanda’s growth targets require new air access capacity from long haul markets offering competitive services, quality and convenience. Additional direct and low cost flights from Europe will be lobbied for to improve access from Europe and North America. Kenya Airways and KLM and other airlines will be approached to offer Kigali on a “common rated fare” with Nairobi for long hall passengers transiting Europe, North America, Asia and other parts of Africa.

Currently the cost of flights to Rwanda is expensive when compared with other competing destinations. A technical working group will be put in place to address this issue. Their activities will include negotiations with the airlines and with IATA to reduce the prices.

## ***5.6 Framework for regulation of the industry***

Tourists purchase the components of a holiday or business trip such as accommodation without being able to see or test the product before the purchase is made. Often this is described as buying a product “sight unseen”.

Registration and operational licenses introduces a minimum standard for tourist accommodation, tour operators, travel agents and guides etc. Grading provides for the identification of standards above the minimum and provides a guide to fair pricing. Rwanda Development Board will regulate the standards of the tourism industry whilst ensuring such standards and their related costs do not act as barriers to entry.

Registration and provisional of operational licenses as well as grading can, without losing their integrity as a quality guide, be used as a tool to raise standards. Towards this end, the quality assessors both from public and private sector will be competent to give advice and guidance to operators:

- Cancellation of operational license or downgrading will not take place before the operator is advised on necessary improvement and given a specific time to implement them;
- Advice will be given on how to make the improvements;
- Assistance will be given by way of incentives to implement them.

Those who are graded will have preferential access to marketing and promotion.

Destinations will be encouraged to develop guidelines and tools for the development of responsible tourism, including codes for tourists and operators on sustainability issues (e.g. waste disposal, energy use, local economic impact, cultural sensitivity).

Legislation will be developed to provide for the protection of tourists and visitors, for the regulation of hotels and other tourist enterprises and services, for the limitation of hotelier liabilities and other matters connected with these issues.

The safety and security of tourists will be assured, by coordination of district authorities with local and national police. Safety and security committees will be established by Destination Management Organizations, to coordinate and collaborate, on behalf of tourists and operators and their employees.

Sustainable tourism guidelines will be developed in a participatory way by joint committee of public and private sector, and disseminated to tourism stakeholders.

## ***5.7 Infrastructure development***

Good access to tourist products and facilities is a basic prerequisite to their contribution to the sector and their commercial success. The focused development strategy outlined in the 2009 Sustainable Tourism Development Master Plan, based around the DMAs and link corridors, facilitates the concentration of investment in the infrastructure and facilities necessary to foster tourism growth. The following areas are particularly important activities for infrastructure development:

- The need for maintenance and upgrading of the access roads and air access facilities serving the DMAs will be kept under constant review. The provision of roadside facilities and stopping points will be developed in conjunction with local communities;

- Health care infrastructures near the national parks with the ability to handle emergency rescue and evacuation of tourists need to be built;
- Improved signage will be developed on access roads, including for tourism attractions and services within DMAs;
- Air access will be improved by rehabilitation of existing airstrips in Musanze, Huye, Rusizi, and Rubavu, and also the construction of a new international airport in Bugesera;
- Boat jetties will also be constructed in key destinations along lakes in Rwanda, including Gisenyi (Rubavu), Kibuye (Karongi) and Cyangugu (Rusizi);
- Infrastructure required for high speed Internet access and also to allow the use of international credit card payments for goods and services, and to make withdrawals from ATM across the country. A technical working group should be created on this issue;
- The registration and grading system will be used as a development tool to guide and enhance the quality of tourist accommodation. Towards this end cancellation-of-registration and downgrading will be implemented only after the proprietors have failed to act on advice and assistance on making the necessary improvements;
- Environmental and social impact assessments will take place prior to any major infrastructure development, including public consultation in the destination with relevant stakeholders. Civil society groups, Private sector, NGOs and other agencies will be invited to provide a peer review mechanism to support the state decision making on particular developments;
- Access to water, electricity and other infrastructural amenities are instrumental in enhancing the tourism experience. These need to be extended to potential tourism development sites.
- Rational and sustainable management of waste is vital, especially in DMAs. A Central Waste management system for towns and cities in DMAs needs to be planned and developed.

### ***5.8 Land access and tenure***

Ensuring a properly developed tourism policy requires that the Government has a land use policy as a vast majority of Rwanda's tourism products is land dependent. The Ministry of Trade and Industry along with the Ministry of Environment and Lands (MINELA) will define procedures for the proper management of land for tourism-related activities and investments.

Development of land for tourism will be guided by the following:

- Planning and management of land, natural and physical resources is delegated to a joint committee of MINELA, MINICOM, RDB and PSF in collaboration with local and regional authorities who are responsible for developing plans identifying community land objectives over a ten-year period, specifying the processes for achieving these;
- Collaborating with relevant authorities on issues of land is required to ensure that areas identified for tourism investment and activities are developed in an environmentally and socially sustainable manner;

- Conservation strategies shall be embraced that reduce the negative impact and contention due to the loss of use of land for local communities;
- The opportunity costs of setting aside land for product development and how tourism revenue affects the trade-off must be analysed;
- A participatory approach to resolving conflicts' arising from land use as it pertains to human-wildlife-tourism is encouraged;
- Adequate market-related compensation shall be given for the loss of income/land from use of said land for tourism related activities;
- Land tenure security and rights for all stakeholders will be clarified and strengthened.

### ***5.9 Environmental sustainability***

Rwanda's tourism resource base is at risk as a consequence of weaknesses in the system of planning and environmental management. The success of future tourism plans is therefore dependent on the commitment to physical planning and control by Government, district councils and other key stakeholders and a partnership approach being forged between the public and private sectors.

Rwanda's tourism industry is environment and nature based. The Conservation and protection of the environment is a priority for all stakeholders in the sector.

- The public and private sectors will, through their own activities and through environmental policing, ensure that all development activities are subject to Environmental Impact Assessments.
- Awareness programmes will be implemented to alert tourists and local populations to the need to respect nature, the physical environment, fauna and flora.
- The District Councils, particularly in the DMAs, supported by the Government, will enforce good planning and environmental protection laws and regulations for the protection of the natural and cultural sites.
- The government aims to extend protected areas to cover 10 per cent of the land surface to reflect the country's biodiversity, in line with IUCN targets. Areas will be identified, environmental and social studies conducted, public consultations made, and then they will be legally gazetted.
- Environmental management plans for protected areas will be developed, and will incorporate biodiversity management, business development (including sustainable tourism) and income generation, human resources and equipment, monitoring and evaluation.
- Tourism concessions will be preferentially granted to investors with sound environmental, social and economic proposals, which enhance biodiversity conservation and benefit local livelihoods.

Tourism will be planned, developed and operated in line with the UNWTO Global Code of Ethics for Tourism and the Global Sustainable Tourism Criteria. Local codes of conduct will be developed and distributed in DMAs for stakeholders.

### ***5.10 Quality investment and financing***

There is a need for effective capital investment support, financial and other incentives for product development. There is also a need to establish and nurture cooperative trade networks, and support business development. Emphasis will be on investment and financing that is able to develop and promote quality and sustainable tourism products, minimize revenue leakage, and provide significant impact to local communities. Policy strategies for investment and finance include:

- Disseminating information on tourism investment opportunities available in the industry to potential investors within and outside the country;
- Implementing tourism-specific tax incentives and beneficiary concessions for capacity building, local sourcing, product development and development of low visitation regions, with particular emphasis on local investment, and development of natural and cultural resources with local communities in a sustainable manner;
- Launching a Tourism Guarantee Fund, aimed at reducing loan interest rates and investment risk in Rwanda’s tourism industry;
- Promoting tourism as a priority sector for development, streamlining investment procedures in collaboration with the RDB and advocating for incentives in the tourism sector;
- Promoting tourist projects and undertakings by way of joint venture arrangements with local partners;
- Allocating the necessary public funds to enable effective development and marketing, as identified in the 2009 Sustainable Tourism Masterplan;
- Developing industry-need-based local capacity building and training programs such that the industry can ensure a supply of qualified local staff at competitive prices, eliminating the need for human resource imports;
- Conducting supply-chain and value-chain assessments of Rwanda’s tourism industry every two years in order to identify additional local linkages that can be created within the industry;
- Developing a “Buy Rwandan” campaign, encouraging the purchase of local inputs and local employment through tax incentives;
- Encouraging the development of wholesale operators servicing Rwanda’s tourism sector through partnerships with local operators, as a way to create local profits through economies of scale;
- Facilitating the upgrading of Rwanda’s tourism sector to e-tourism in order to equip local operators with greater leverage in price setting, and a mechanism to capture additional portions of value chains, create their own brand and images, and gain direct access to their target markets;
- Encouraging local communities to create tourism-related businesses with access to low interest loans.

## 6. Stakeholder views

A RESC session was held on the Tourism Policy, with a good selection of stakeholders in the sector including development partners, the public and private sectors, as well as the Private Sector Federation (PSF), which had consulted other key private sector stakeholders. The meeting was broadly positive towards the Policy, with a number of specific comments made.

The views of the stakeholders were integrated in the document, they are also summarised below.

- Targets tourist numbers and revenues should be on specific tourism segments such as leisure and business tourists but not on overall visitor arrivals.
- Affordability does not go in line with Rwanda's strategy of being a high-end destination. The Policy should focus on Rwanda as a high-end destination and not as an affordable one. The use of the term "affordable" gives out a negative connotation of Rwanda's tourism industry and could be seen as a region promoting mass tourism and not as a high end destination as we position ourselves.
- Value for money should also be supported through the different associations where different members should adhere to a specific code of conduct that ensure that the quality of tourism products and services are maintained.
- To promote product development, it should be clear who is charged with the licensing and regulation of the industry. This organisation should then be given full support to carry out its duties.
- The private sector needs to be regularly updated on Rwanda's tourism statistics.
- The private sector needs a fund that will support tourism-marketing activities. The fund could be supported in partnership with the government. The tourism businesses will be charged a tourism levy and the Government would support these activities. This idea is borrowed from Kenya, which has a Catering Training and Tourism Development Levy.
- The continual upgrading of skills and a training programme should not only be limited to covering tour guiding skills but also employees in the hospitality industry including cooks, and waiters.
- Tourism education and nature conservation subjects should be included in the national education curriculum.
- Emphasis should not only be placed on the technical cadre but should be expanded to include everyone in the industry including owners and managers. The whole industry is need of an exhaustive capacity building plan.
- The private sector feels that there should be a Ministry of Tourism as exists in other countries in the region. By having a parent ministry, the private sector feels that all issues pertaining to tourism including capacity building, licensing etc. will all be handled by one central bureau.
- Signage should not only be limited to access roads to tourism destinations, but should also include all streets and roads in the country.

- The private sector should be consulted during the environmental and social impact assessments that take place prior to any major infrastructure development.
- Access to water and electricity is key to enhancing the tourism experience and should explicitly be mentioned in the policy.
- There should be industry specific tests that are carried out when assessing tourism infrastructure. The situation currently is that tourism infrastructure is assessed as manufacturing plants without the appreciation that these are different.
- Access to quality healthcare including availability of emergency evacuation, search and rescue.
- A suitable waste management policy should also be put in place. As it currently stands, hotels have to install a waste management system that is costly. Waste management services are part of key infrastructure and should be provided for by the Government and then the hotels direct their waste to a central system.
- “..a joint committee of Ministry of Lands, MINICOM, RDB, in collaboration with local and regional authorities..” pg 17. There should be private sector representation in this committee as well.
- The way communities work with the different tourism businesses should be regulated. The policy should ascertain that communities are getting wealthier from the tourism activities in their locality. A system that ensures that money goes into the community should be identified and put in place. These could for instance be done at the local government level. Another way could be to give the interest rates accrued on certain loans to the communities.
- Some people set up businesses in an ad hoc way without prior thought being put into how people run tourism businesses and also without a sound business plan. This should be monitored and checked and already existing business owners should be adequately trained.
- Who provides for waste disposal? Currently there are no guidelines on treatment plans and the current systems available for waste treatment are very costly. There should be partnerships that are developed to enable affordable ways of meeting waste treatment. Kigali City Council could for instance provide the main treatment plant of waste disposal and then the businesses would channel their waste into this treatment plant.
- “..and provides a guide to fair pricing”. The guide to fair pricing should in no way mean the regulation of prices. There should however be the regulation of service standards and quality.
- Heritage and cultural sites should also be conserved. There should be the introduction of a monuments act for example.
- Wetlands should also be gazetted and not left to the environment.
- Lowering VAT that is charged on restaurants. This would have a direct impact on the prices that are charged for food thereby making restaurants more accessible to people. In

most countries, the VAT that is usually charged on the hospitality industry is less than in other sectors. This is not the case in Rwanda.

## **Role of different stakeholders**

### **Private sector**

It should be mandatory for all persons providing tourism services to belong to an appropriate and legally registered industry association which has developed a recognised code of conduct.

### **Government**

The Government should put in place specific funds that will subsidise capacity building efforts.

### **Training institutions**

There should be the provision of training grounds that will be accessible for students to carry out their practical work. This will provide the needed balance of theory and practical work.

Based on the assessment of industry needs, a comprehensive human resources development plan should be developed.

### **Regional and international co-operation**

While a regional approach in marketing and product development should be of advantage for all countries involved, policies must also include a mechanism for achieving an equitable sharing of benefits among the partner states.

For regional and international co-operation, Rwanda needs to support the joint marketing of East Africa as a single destination at the same time as profiling itself as a unique destination within the region.

## **7. Implementation plan**

Annex 2 sets out the timing and the organisations responsible for the implementation of the policies. Overall responsibility for monitoring the implementation will lie with RDB who will monitor performance and report to the Minister responsible for tourism on implementation in its Annual Report. Coordination on policy implementation will be facilitated by RDB. Where, in exceptional cases, implementation issues arise which are outside the capabilities of RDB to resolve they will be referred to the Board of RDB.

## **8. Financial implications**

International tourism earned \$210 million for Rwanda in 2008. This generated \$30 million in VAT alone, to this can be added tax revenues generated by income taxes and company taxes etc. collected from employees and companies in tourism and amongst suppliers to the tourism sector. In 2020 the projected \$627million will generate \$90 million in VAT.

Funding by the Government of Rwanda for the implementation of the policies and the Tourism Master Plan will, in addition to the existing RDB budget, require an estimated \$42 million. This together with the implementation framework in Annex 2 should be used as a guideline for RDB planning and budgeting over the next few years.

The majority of the funding for products and facilities will come from the private sector in response to the proposed investment incentives and the promotion of the plan and the investment opportunities – RDB should act as a facilitator for this investment.

## **9. Legal implications**

In order to implement the Tourism Policy, an enabling bill has been developed and has provisions for the protection of tourists and visitors, for the regulation of hotels and other tourist enterprises and services, for the limitation of hotelier liabilities and other matters connected therewith and incidental thereto thus impacting positively on tourism development of the country.

The draft tourism legislation, “Rwanda Tourist Industry Bill 2009” will need to be enacted and followed by the making of regulations governing the registration and grading procedures and requirements.

Additional policies/legislation to be considered:

- A tourism concession policy will be developed, linked with the land and wildlife policy;
- Legislation on entry visas;
- Regulations on flight access for new international carriers;
- Regulations on tourism signage on access roads;
- Regulations on use of international credit and debit cards;
- Development of tour guide regulations;
- Safety and security of tourists?

## **10. Impact on business**

Under the Destination Management Area (DMA) model, specific areas are designated for the focus of investments. The private sector will be encouraged to focus on these areas. RDB and supporting institutions will aim to work with Rwanda Development Bank and other financial institutions to facilitate financing for investment in these areas – particularly in hotels, lodges and tour operators.

Business can expect to benefit from this investment as well as the broader benefits of increased amounts of tourists from the improved branding of Rwanda’s tourism sector.

There will also be a growth in the number of SMMEs operating in tourism and related enterprises, and also community-based enterprises.

## **11. Impact on equality, unity and reconciliation**

The policy will create community tourism projects and programmes that will create jobs that will in return be beneficial to the population. Currently approximately 256,000 people are employed (loosely) in the tourism sector. Under the growth projections envisaged by this policy, an additional 40,000 jobs could be created by 2012, with a further 115,000 jobs between 2012 and 2020.

These are ambitious projections, but greater employment can be expected to have a beneficial impact on the welfare of Rwandans.

## **12. Handling plan (communication plan)**

RDB will disseminate the policy to all the stakeholders by holding regular seminars and workshops at both the national and regional levels. There will be at least one workshop at the national level every year and four regional workshops for the provinces.

## **Annex 1: Roles of key players in the tourism industry: Policy Guidelines**

Roles and responsibilities of government, private sector, communities, NGOs and other key players in tourism development should be influenced by the following policy guidelines:

### ***National government***

The role of national government is to provide an enabling environment for sustainable tourism to flourish, and to provide the overarching vision of a sustainable tourism industry. The roles include the following:

Facilitation and implementation:

- i. establish a safe and stable political and economic environment for tourism to flourish;
- ii. ensure the safety and security of residents and visitors;
- iii. facilitate and provide appropriate incentives for private sector investment in tourism;
- iv. establish and facilitate enabling and appropriate legal and fiscal frameworks for the industry;
- v. facilitate the development of a tourism culture in Rwanda and the supply of skilled manpower for the industry;
- vi. facilitate an active labour market policy and an appropriate labour relations environment for the industry;
- vii. allocate appropriate financial resources for tourism development;
- viii. promote tourism as a national priority;
- ix. facilitate and conduct the effective marketing and promotion of the country;
- x. encourage and facilitate foreign investment.

Coordination:

- i. coordinate and liaise with international, regional and provincial governments with regard to all aspects of tourism development
- ii. coordinate the tourism-related efforts of all government departments and related government institutions
- iii. coordinate and liaise with NGOs, labour and community organisations, training institutions, universities and other bodies related to the development of the tourism sector
- iv. coordinate and liaise with the private sector, their associations and representatives to ensure an enabling environment for dialogue and investment.

Planning and policy-making:

- i. formulate, monitor and update a national tourism policy and strategy, in collaboration with relevant stake-holders
- ii. develop integrated national tourism plans in collaboration with relevant stakeholders

Regulation and monitoring:

- i. ensure the application of integrated environmental management principles in land-use development proposals to facilitate sustainable utilisation of natural and cultural resources
- ii. facilitate the sustainable and responsible development of the tourism industry, by formulating appropriate development guidelines and regulatory measures
- iii. establish and maintain standards of facilities and services

### ***Local government***

At the local government level, specific provincial functions of policy implementation, environmental planning and land-use, product development, marketing and promotion are further supported. Specific functions of the local government include:

- i. responsible land-use planning, urban and rural development
- ii. control over land-use and land allocation
- iii. control public health and safety
- iv. facilitate the participation of local communities in the tourism industry
- v. ensure that tourism focal points have training in tourism
- vi. liaise with the private sector to facilitate investment and a quality tourism product offering

Local government should not provide services that can be provided by the private sector. The exact role of the local authorities in each province will be determined by local conditions as well as skills and financial resources.

### ***Private sector***

The private sector has and will continue to play a critically important role in the further development and promotion of tourism. The private sector bears the major risks of tourism investment as well as a large part of the responsibility for satisfying the visitor. The delivery of quality tourism services and providing the customer with value for money are largely private sector responsibilities. Furthermore, the private sector is in a position to promote the involvement of local communities in tourism ventures by, inter alia, establishing partnership tourism ventures with communities. The government of Rwanda is committed to providing a climate conducive to the further growth, development and profitability of the tourism private sector. Specific private sector functions include:

- i. investment in the tourism industry
- ii. operate and manage the tourism plant efficiently and profitably
- iii. advertise and promote individual tourism services as well as the country - locally, regionally and internationally
- iv. continuously upgrade the skills of the workforce by continuously providing training and retraining
- v. satisfy customer needs by providing quality products and services
- vi. develop and promote socially and environmentally responsible tourism

- vii. ensure the safety, security and health of visitors in collaboration with the government and other private sector members
- viii. collaborate with the government in planning, promoting and marketing tourism
- ix. involve local communities in the tourism industry through establishing partnership ventures with communities, out-sourcing, purchase of goods and services from communities (e.g. poultry, herbs, vegetables and other agricultural supplies, entertainment, laundry services, etc.)
- x. enable communities to benefit from tourism development, for example communities benefiting directly from new water reticulation systems and village electrification programmes developed through tourism investment in rural areas
- xi. operate according to appropriate standards
- xii. efficiently organise itself to speak with one voice
- xiii. represent the interests of private business on the boards of the major national and provincial tourism bodies.

### *Communities*

Communities are also expected to play a vital role in the development of tourism. Many communities particularly those in rural areas, that have not actively participated in the tourism industry possess significant tourism resources. The role of communities include:

- i. organise themselves at all levels (national, provincial and local) to play a more effective role in the tourism industry and interact with government and role players at all levels
- ii. identify potential tourism resources and attractions within their communities
- iii. exploit opportunities for tourism training and awareness, finance and incentives for tourism development
- iv. seek partnership opportunities with the established tourism private sector
- v. participate in all aspects of tourism, including being tourists
- vi. support and promote responsible tourism and sustainable development
- vii. oppose developments that are harmful to the local environment and culture of the community
- viii. participate in decision-making with respect to major tourism developments planned or proposed for the area
- ix. work toward enhancing the positive benefits of tourism and minimise the negative impacts
- x. organise themselves to maximise the sharing of information and experiences, possibly facilitated through financial assistance by local governments
- xi. have a representative voice in all tourism structures at national, provincial and local levels
- xii. encourage the press, particularly the radio and the print media to proactively provide tourism information and awareness to communities
- xiii. work closely with NGOs to educate communities concerning tourism and engender tourism awareness
- xiv. make information on community tourism resources and attitudes transparent and accessible to all levels of national, provincial and local governments

- xv. sensitise the private sector, tourism agencies, environmental agencies and NGOs to the importance of communities involvement in tourism development
- xvi. actively participate in and promote responsible tourism

### ***NGOs***

NGOs, particularly environmental and community-based ones, are expected to play a vital role in the development and spread of responsible tourism practices. They are expected to play the following roles:

- i. contribute to the development of policies and plans for the tourism industry
- ii. assist the government in developing a standard for responsible tourism
- iii. assist the government, private sector and communities in implementing, monitoring and evaluating responsible tourism
- iv. attract funding from donor agencies to develop specific community-based tourism projects
- v. assist communities and community groups in organising themselves, preparing themselves for tourism and implementing tourism projects
- vi. assist the government in conducting tourism and environmental awareness programmes among communities and the tourism industry at large
- vii. liaise between the private sector and communities to generate more community involvement in the tourism sector and stronger private sector commitment
- viii. deliver education, training and bridging courses to local communities

### ***The media***

Areas of participation and involvement by the local media in developing tourism include:

- i. tourism awareness programmes to the population at large
- ii. press coverage and special campaigns to promote responsible tourism initiatives
- iii. promotion of domestic tourism through familiarisation trips and press reports on different destinations
- iv. cooperate with Destination Management Organisations in marketing their destinations to the domestic market
- v. provide an important link to the national public relations efforts in overseas markets

### ***Financial institutions and development partners***

Financial institutions have a critical role to play in tourism development, by enabling investors and entrepreneurs to access funding to start and expand their businesses. They are expected to play the following roles:

- i. Provide access to finance to tourism investors;
- ii. Require reasonable guarantees on loans, and provide flexibility for new entrants into the market;
- iii. Provide reasonable and low interest loans where returns on investment take time to generate;

- iv. Provide preference in credit to investors with a good approach to environmental management, local economic development, and uplifting society and culture;
- v. Provide facilities to use international credit and debit cards at ATMs and retail outlets;

Development partners have played a very significant role in supporting the Government's policy on tourism. This support has sustained the Government's policy on protection of natural resources, and has assisted in the development of tourism.

### ***Training institutions***

Tourism training institutions have a key role in building the capacity and quality of the tourism industry. Among other issues, they are expected to:

- i. Provide training in tourism and hospitality to a professional standard
- ii. Ensure appropriate staff faculty liaise with relevant parts of government to ensure that curriculum and appropriate standards are maintained;
- iii. Be responsive to the needs of the private sector in the recruitment of staff, development of course material, design of internships in industry, and in the skills transferred to students;
- iv. Development of library and reference resources;
- v. Provide assistance to students in their search for employment following graduation;
- vi. Ensuring that graduates have a good understanding of sustainable tourism principles, and can apply them in their work.

Prioritise addressing skills gaps as highlighted in the 2009 Sustainable Tourism Master Plan.

## Annex 2: Detailed implementation framework

The following table provides a detailed implementation framework for this Policy as well as the early implementation of the Sustainable Tourism Masterplan.

Programme	Activities	Responsible	Budget(Frw)
<b>1. Product Development and diversification</b>	Expand Rwanda's product base through the development and upgrading of existing products and the development of new products on a hub and spoke basis in line with the Sustainable Tourism Development Master Plan concept;	<b>RDB</b>	1,306,400,000 Rwf
	Build on the strengths of the nature product by clustering development around the major natural resources (National Parks) forming Destination Management Areas (DMAs) with flagship visitor attractions;	<b>RDB</b>	681,600,000Rwf
	Create tourism corridors (spokes) that provide linkages between Kigali (hub) and the DMAs and which will be enhanced by the development of community and cultural based tourism products;	<b>RDB</b>	284,000,000 Rwf
	Follow the inclusive approach to planning and design, ensuring community consultation, involvement and partnerships and putting an end to ad hoc and inappropriate development ;	<b>RDB/MINALOC &amp; DISTRICTS</b>	113,600,000 Rwf
	Enforce planning and environmental controls so as to protect the environment and the investments of the private sector and of the government in infrastructure and marketing;	<b>RDB/REMA</b>	113,600,000 Rwf
	Keep the maintenance and upgrading of the access roads to the DMAs under constant review. The provision of roadside facilities and halting points will be developed in conjunction with local communities;	<b>MININFRA/RDB</b>	852,000,000 Rwf
	Development of conference and meeting facilities	<b>RDB</b>	PPP
	Development of guidelines for sustainable product development	<b>RDB</b>	14,200,000 Rwf
	Development of a concessions strategy, program and tools	<b>RDB</b>	17,040,000 Rwf
	Feature the culture and history of Rwanda as a special element of the tourist product projecting the peoples, the nation and the rich history;	<b>RDB</b>	28,400,000 Rwf
	Convert ORTPN Office to information and promotion museum in Kigali	<b>RDB</b>	14,200,000 Rwf

	Refurbish Royal Palace	<b>NMR (Butare)</b>	113,600,000 Rwf
<b>2. Marketing and awareness</b>	Ensure that all marketing activities including promotional initiatives, sales drives, trade and consumer fair attendance, advertising, familiarisation visits, educational visits, sponsorships, collaterals production and distribution and media releases are part of an integrated marketing plan;	<b>RDB</b>	Budget below
	Promote Rwanda as a destination for responsible tourists so as to avoid social, health, environmental and cultural damage and the mistakes made by other destinations;	<b>RDB</b>	Budget below
	Organise promotional and advertising campaigns in partnership with commercial providers (tour operators, airlines, hotel groups etc.) ensuring cost sharing and commercially oriented activity;	<b>RDB</b>	568,000,000 Rwf
	Appoint market-based representation in key target markets. It will be policy to appoint, on a contract basis, specialist professional representation companies;	<b>RDB</b>	1,136,000,000 Rwf
	Brand Rwanda as a destination with a distinctive image and position in the marketplace. The new brand will set the standards, messages and tone for all marketing activities and will include a design style for a range of high quality collaterals;	<b>RDB</b>	568,000,000 Rwf
	Develop a state-of-the-art tourism internet portal, that is e-commerce enabled, in various languages, as the key communication tool to potential tourists and to the travel trade;	<b>RDB</b>	284,000,000 Rwf
	Enable ATMs and businesses in Rwanda to accept international credit and debit cards.	<b>BNR and Commercial Banks</b>	568,000,000 Rwf
	Counteract any negative images of Rwanda through a planned public relations programme of good news media releases, media visits and high profile events;	<b>RDB</b>	284,000,000 Rwf
	Explore cost-effective joint promotional initiatives in long-haul growth markets in partnership with regional East African destinations;	<b>RDB</b>	227,200,000 Rwf
	Develop a Rwanda Convention Bureau to actively market the conference and meetings product, targeting conference organisers, government agencies, NGOs, associations and the corporate sector in the Central and East African region;	<b>RDB</b>	284,000,000 Rwf

	Put in place best practice market research procedures to ensure that a market-led approach is adopted in all marketing and development decision making;	<b>RDB</b>	113,600,000 Rwf
	Participation in international trade fairs with participation of the private sector.	<b>RDB/Private Sector</b>	568,000,000 Rwf
<b>3. Capacity building and developing human resources</b>	Establish regulated international-quality tourism training programmes in existing and new educational and vocational schools and colleges, concentrating on operative skills training to meet immediate industry needs;	<b>RDB/MINEDUC</b>	
	Provide higher level education and skills training throughout the country through arrangements with regional educational establishments;	<b>RDB</b>	
	Provide train-the-trainer programmes for selected industry operatives so as to enable on-the-job and industry based training for existing employees;	<b>RDB/MIFOTRA</b>	568,000,000 Rwf
	Provide train-the-trainer support for existing educational and vocational schools;	<b>RDB/MINEDUC/Districts</b>	568,000,000 Rwf
	Provide special training in communities in support of community based tourism projects and SMMEs;	<b>MIFOTRA/RDB</b>	170,400,000 Rwf
	Involve the industry in the development of human resource policies and implementation;	<b>RDB/MINEDUC/Private Sector</b>	170,400,000 Rwf
	Provide educational establishments with access to materials and resources required	<b>MINEDUC/ Private Sector</b>	568,000,000 Rwf
	Develop RDB as a centre of excellence, adequately resourced so that it ranks amongst the leading small national tourist organisations in the world.	<b>RDB/UNWTO</b> <b>RDB/UNWTO</b>	568,000,000 Rwf
	Contract Technical Assistance in Marketing, Development and HRD to mentor the RDB/Industry Executives	<b>RDB/UNWTO</b>	1,022,400,000 Rwf
	Provide training in tourism for focal points in local government, particularly on planning and destination management	<b>RDB/UNWTO</b>	170,400,000 Rwf
	Establish and Human Resources Development Advisory council	<b>RDB/MINEDUC/</b>	56,800,000 Rwf
	Provide crash courses for 6-8 trainers on tourism related issues	<b>RDB/MINEDUC/Private sector</b>	284,000,000 Rwf
	Set up a Tourism and Hospitality Training Institute in Kigali	<b>RDB/MINEDUC</b>	1,136,000,000 Rwf

	Develop a national tour guiding skills program and a tour guide training program	<b>RDB/</b>	113,600,000 Rwf
	Establish registration and licensing of guides.	<b>RDB/UNWT O</b>	113,600,000 Rwf
<b>4. SMME and community development</b>	Support services to improve the “market readiness” of tourism enterprises	<b>RDB/Private Sector</b>	56,800,000 Rwf
	Support for tourism enterprises in developing effective marketing tools and action to bring their product to the market;	<b>RDB/Private Sector</b>	113,600,000 Rwf
	Support for tourism enterprises in developing an effective e-business capability and a functioning capacity to present and trade their services on the Internet;	<b>RDB/Private Sector</b>	113,600,000 Rwf
	Strengthening business and management capability at the level of the individual enterprise;	<b>RDB/Private Sector</b>	113,600,000 Rwf
	Forming a group of successful local business people to act, on a voluntary basis, as business mentors to tourism SMMEs	<b>RDB/Private Sector</b>	56,800,000 Rwf
	Improving market linkages between SMMEs and larger enterprises	<b>RDB/Private Sector</b>	113,600,000 Rwf
	Improving access to market intelligence on market demand and supply in tourism and support service sectors;	<b>RDB/Private Sector</b>	56,800,000 Rwf
	Improving access to finance for SMMEs, in relation to viable business plans.	<b>RDB/Private Sector/ Commercial banks</b>	56,800,000 Rwf
	Identify and support commercially viable community based tourism initiatives that can make a contribution to poverty alleviation and conservation;	<b>RDB/Districts</b>	113,600,000 Rwf
	Highlight the necessity for community-based tourism products to be accessible and marketable;	<b>RDB/Districts RDB/MINICOM</b>	11,360,000 Rwf
	Target enterprise support at SMEs and micro-enterprises.	<b>RDB/MINALOC</b>	11,360,000 Rwf
	Encourage RDB and NGOs to help small and medium-sized and micro enterprises;	<b>MINICOM</b>	
	Develop a mentor programme to support SMEs and micro – enterprises, particularly community-based enterprises;	<b>RDB Districts</b>	
	Maximise the benefits of tourism to local communities in the Tourism Destination Areas and on the link corridors through the implementation of the Tourism Development Master Plan;	<b>RDB</b>	

<b>5. Access to Rwanda as a destination</b>	Ensure that frontier crossings, customs and visa facilitation do not provide any competitive disadvantages for Rwanda;	<b>RDB/RRA/ MININTER</b>	56,800,000 Rwf
	Lobby for additional direct and low cost flights from Europe to improve access from Europe, Asia and North America and within Africa	<b>RDB/MININFRA</b>	113,600,000 Rwf
	Revisit visa requirements for international arrivals.	<b>RDB/Immigration</b>	No funds necessary
<b>6. Regulation</b>	Use Registration and grading as a tool to raise standards while maintaining their integrity as a guide to quality for the consumer	<b>RBS/RDB</b>	113,600,000 Rwf
	Establish safety and security committees for tourists within DMAs	<b>RDB/MINADEF/MININTER</b>	113,600,000 Rwf
	Development of sustainable tourism guidelines	<b>RDB</b>	56,800,000 Rwf
<b>7. Infrastructure</b>	Access road development and maintenance	<b>MININFRA</b>	568,000,000 Rwf
	Signage	<b>RDB</b>	170,400,000 Rwf
	Rehabilitation of existing airstrips, and creation of a new international airport	<b>MININFRA</b>	1,704,000,000 Rwf
	Infrastructure for high-speed internet access	<b>RDB</b>	568,000,000 Rwf
	Facilities to use international credit cards	<b>BNR/Commercial banks</b>	170,400,000 Rwf
	Development of ports and jetties on major water bodies	<b>RDB/MININFRA</b>	568,000,000 Rwf
<b>8. Land, access and tenure</b>	Development of a joint planning committees	<b>RDB/MINALOC/Ministry of Lands</b>	56,800,000 Rwf
	Collaboration of relevant authorities on land issues	<b>Ministry of Lands,REMA</b>	56,800,000 Rwf
	Analysis of opportunity costs of setting aside land	<b>RDB/Ministry of Lands</b>	5,680,000 Rwf
	Compensation for loss of income/land in relation to tourism	<b>Ministry of Lands,MININFRA,RDB</b>	113,600,000 Rwf
	Modification of boundaries of protected areas and additional PAs to ensure 10per cent of land is conserved	<b>Ministry of Lands,RDB</b>	113,600,000 Rwf
	Resolving human wildlife conflict	<b>RDB</b>	113,600,000 Rwf
	Sensitizing local authorities on the benefits and costs of tourism	<b>MINIRENA/ Districts</b>	113,600,000 Rwf
	Strengthening and clarifying land tenure security and rights	<b>RDB/Ministry of Lands</b>	170,400,000 Rwf

<b>9. Environmental sustainability</b>	Ensure conservation and the protection of the environment are a priority for all players in the sector;	<b>RBD/MINALOC/REMA</b>	56,800,000 Rwf
	Ensure that all private and public sector development activities are subject to Environmental Impact Assessments;	<b>REMA/RDB</b>	56,800,000 Rwf
	Sensitise tourists and local populations to the need to respect nature, the physical environment, fauna and flora;	<b>REMA/RDB</b>	56,800,000 Rwf
	Ensure good planning and environmental protection laws and regulations, are enforced by the District Councils supported by the Government, particularly in the DMAs;	<b>REMA/RDB/MINALOC</b>	56,800,000 Rwf
	Development of environmental and tourism management plans for protected areas	<b>RDB</b>	284,000,000 Rwf
	Tourism concession program developed	<b>RDB</b>	113,600,000Rwf
<b>10. Quality investment and financing</b>	Disseminate information on tourism investment opportunities available in Rwanda	<b>RDB</b>	56,800,000 Rwf
	Implement tax incentives and beneficiary concessions	<b>RDB/ MINICOFIN</b>	56,800,000 Rwf
	Launch a Tourism Guarantee Fund	<b>RDB</b>	170,400,000 Rwf
	Promote joint venture agreements	<b>RDB/Private Sector</b>	56,800,000 Rwf
	Develop industry-need-based local capacity building programs	<b>RDB/MINALOC/NGOs</b>	56,800,000 Rwf
	Conduct supply and value-chain assessments of the tourism industry every 2 years	<b>RDB/NGOs</b>	56,800,000 Rwf
	Develop a 'Buy Rwandan' campaign	<b>RDB</b>	56,800,000 Rwf
	Develop partnerships between wholesalers and local operators	<b>RDB/Tour operators</b>	113,600,000 Rwf
	Establish facilities for e-commerce	<b>RDB</b>	56,800,000 Rwf
	Promote value for money rather than price as the measure of customer satisfaction	<b>RDB/Private Sector</b>	56,800,000 Rwf
<b>TOTAL COST OF POLICY IMPLEMENTATION ACTIVITIES</b>			<b>20,777,440,000 Rwf</b>