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STRENGTHENING SUSTAINABLE ECOTOURISM IN AND AROUND NYUNGWE NATIONAL PARK (SSENNP)

FINAL REPORT



MARCH 2015

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DAI thanks the dedicated professionals that made up the Nyungwe Nziza team for their contributions to the success of this project. We would like to give special thanks to our dear friend and colleague Dr. Jim Seyler, SSENPP's Chief of Party from the project's inception in March 2010 until the date of his untimely passing in November 2013. Jim loved Rwanda and Nyungwe National Park. Under his skilled leadership, the SSENPP team was able to transform Nyungwe National Park into a top-rated ecotourism destination focused on providing sustainable economic benefits to local communities while conserving the resource-rich rainforest reserve. Jim is greatly missed by his colleagues and friends but his legacy lives on in Nyungwe Nziza.

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ABBREVIATIONS AND ACRONYMS

DIC	Duhuze Imbaraga Cooperative
DNP	Destination Nyungwe Project
IR	Intermediate Result
km	kilometer
KOTWIKI	Koperative Twiyubak'e Kitabi
PIR	Project Intermediate Result
PPP	public-private partnership
RDB	Rwanda Development Board
ROI	return on investment
SATW	Society of American Travel Writers
SSENNP	Strengthening Sustainable Ecotourism in and around Nyungwe National Park project, also known as Nyungwe Nziza
USAID	U.S. Agency for International Development
USNPS	U.S. National Park Service
WCS	Wildlife Conservation Society

EXECUTIVE SUMMARY

USAID’s Strengthening Sustainable Ecotourism in and around Nyungwe National Park (SSENNP, or *Nyungwe Nziza* [Beautiful Nyungwe]) project was launched in March 2010 and closed in March 2015. The project supported the Rwanda Development Board’s (RDB) efforts to improve overall management of the National Park and helped local communities and the private sector engage in ecotourism activities and thereby gain tangible financial benefits from biodiversity conservation efforts in the area. Overall, these efforts were successful.

Nyungwe Nziza’s performance monitoring plan had 28 indicators; the targets for 19 of these were achieved or exceeded. The targets for another six were close to being met, and the three remaining targets were not achieved. Among the project’s most significant outcomes were the creation of 25,000 days of paid employment for local people and increased economic benefits for more than 2,000 people. The number of visitors to Nyungwe more than doubled over the five years of project implementation. Moreover, between 2013 and 2014, the increase in the number of visitors—32 percent—was by far the greatest increase among Rwanda’s three National Parks (Volcanoes and Akagera are the others). In part, these improvements were the result of the project’s successful efforts to restructure the Nyungwe’s system of entrance fees and a robust marketing strategy.

The main areas of Nyungwe Nziza underperformance were in leveraging private sector investment in ecotourism. Despite the project’s use of grants to community groups and its support of public-private partnerships (PPPs), local businesses found it difficult to access capital for co-investment. If USAID/Rwanda continues to promote investment in tourism in and around Nyungwe National Park, it should consider using the Development Credit Authority mechanism to mitigate the perceived risks of private sector lending.

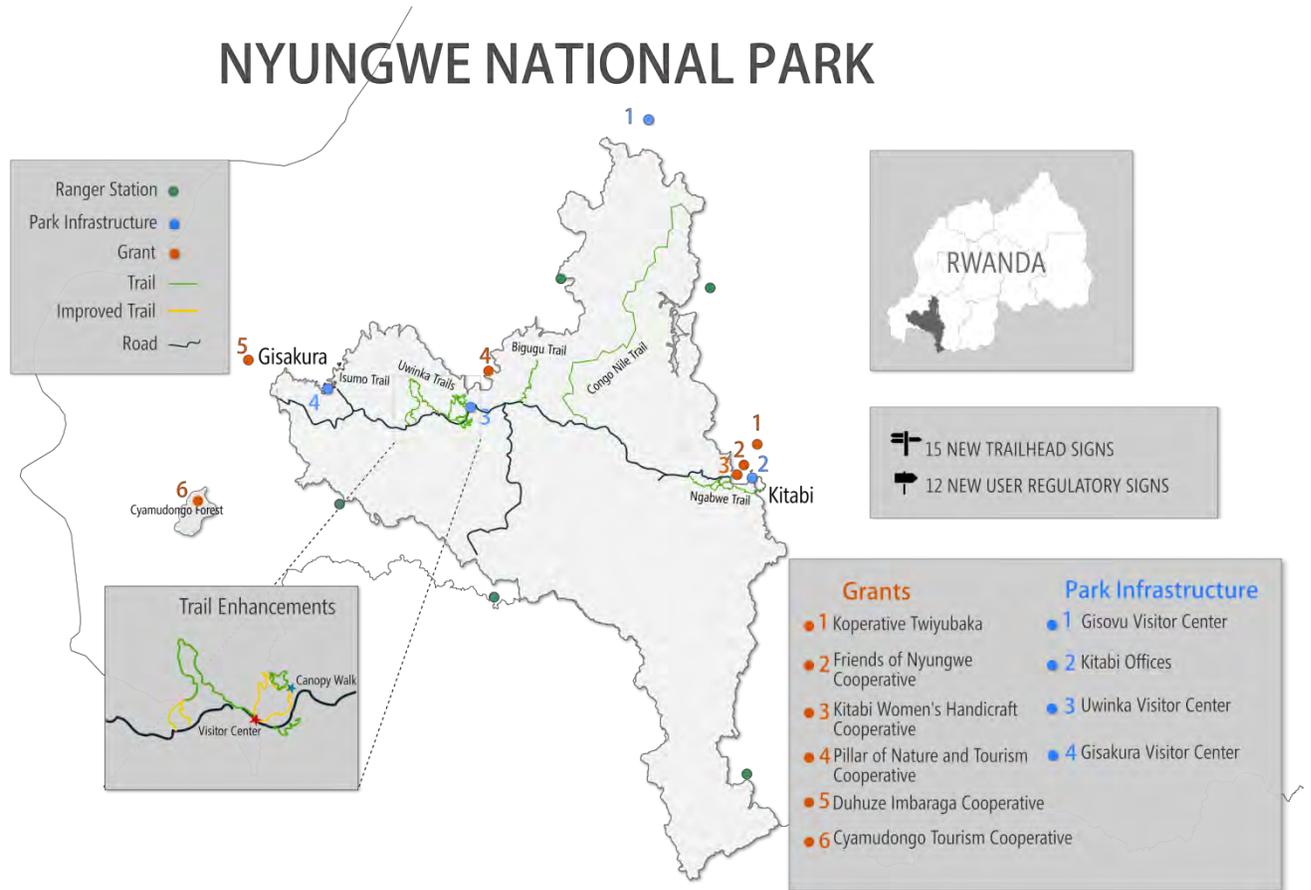
Nyungwe Nziza’s legacy will rest not only on the significant improvements that the project has made to park infrastructure—visitor centers, informational materials, and trails—but also on the improved capacity of park staff. RDB personnel were integrally involved in reforming concessions policy, working hand-in-hand with U.S. National Park Service (USNPS) staff who were engaged through the project. RDB staff also worked closely with the project’s consultants to develop improved marketing campaigns and materials. In 2013, Nyungwe won several international tourism rewards as a result of these collaborative efforts—including the British Guild of Travel Writers Best Overseas and Best Global Project Awards and the Society of American Travel Writers (SATW) Phoenix Award for “outstanding accomplishments in conservation, preservation, beautification, and environmental achievements”—and the *National Geographic Traveler* named Nyungwe as “a best trip for 2014”—one of only two destinations in Africa to receive such acclaim.

The project’s support to local community groups was also successful. Nyungwe Nziza used small grants to kick-start community ecotourism ventures, which ranged from small infrastructure development to agricultural activities linked to marketing produce to local hotels and restaurants. Although these groups have yet to generate significant income, several have already invested a portion of their revenues in community development activities such as providing poor families with access to healthcare and launching saving-and-loan schemes. The project delivered training to strengthen the capacity of these groups to provide high-quality products and services to visitors; 40 percent of trainees and 60 percent of

grant beneficiaries were women. Preliminary results indicate that these initiatives hold considerable promise for being sustainable and that they will further enhance recognition that Nyungwe National Park is an asset for local economic development.

Figure 1 shows where the different types of activities supported by Nyungwe Nziza were implemented.

FIGURE 1: NYUNGWE NZIZA ACTIVITIES



INTRODUCTION

Nyungwe Forest is the largest remaining tract of montane forest in the Albertine Rift landscape. The Albertine Rift montane forest ecoregion covers just over 100,000 square kilometers (km²)—although small in comparison to most of Africa’s ecoregions, its ecological significance is among the highest on the continent and it is classified as “globally outstanding” in terms of biological diversity and endemism. Key characteristics of the ecoregion include the following (after Burgess et al., 2004¹):

- Extremely high species diversity of vertebrates (66 amphibian species, 130 reptile species, and 732 bird species—the highest in Africa; and 221 mammal species—the second highest in Africa).
- The highest levels of faunal endemism in Africa.
- Twenty-six endemic mammals—the highest in Africa; 36 endemic birds (75 percent of which are found in Nyungwe)—the highest in Africa; 33 endemic amphibians—the highest in mainland Africa; and 10 endemic reptiles.
- An estimated 567 endemic plant species and 117 species of butterfly.

The ecoregion is classified as endangered and extinction risks are the second highest in mainland Africa (which has more than 100 ecoregions). Its conservation status is “critical.”

Nyungwe Forest Reserve was established in 1933 to protect one of the largest blocks of forest in the Albertine Rift montane forest ecoregion. At the time, the main threat to the forest ecosystem was clearance for agriculture—largely by smallholders but also by commercial tea plantations. In the 1970s, artisanal gold miners made serious incursions into the forest as they started working deposits along the many streams and rivers throughout the park. To combat these threats, Nyungwe National Park was created in 2004. Today, the area still faces serious threats, such as the cutting of trees for firewood. Nevertheless, the situation in Nyungwe is more encouraging than in most other forested areas in the ecoregion, where the “future threat index” (after Burgess et al., 2004) is the highest in Africa.

Nyungwe National Park covers an area of about 1,200 km²—less than 2 percent of the total area of the ecoregion—but it represents about 10 percent of the region’s gazette forests. Undoubtedly, it is one of the most crucial conservation priorities in the most biologically diverse yet ecologically threatened region in Africa.

As stated by Peter Malnak, Mission Director of USAID/Rwanda, “Nyungwe National Park is one of the most spectacular natural landscapes in the world. USAID is proud to have been working alongside our Rwandan partners in this montane rainforest since the 1980s. Nyungwe is now transforming into an ecotourism destination that attracts visitors from all around the world. Most importantly, the Rwandan government, the private sector, and local communities understand the value in Nyungwe, and are working together to protect the forest not only for its remarkable beauty, but also for the economic benefits and ecological services it provides.”

¹ Burgess, N., J. D’Amico Hales, E. Underwood, E. Dinerstein, D. Olson, I. Itoua, J. Schipper, T. Ricketts, and K. Newman. (2004). *Terrestrial Ecoregions of Africa and Madagascar: A Conservation Assessment*. Washington, Covelo, London: Island Press.



Two members of a group of chimpanzees (*Pan troglodytes*) living in the Gisovu area of Nyungwe Forest. The chimps are habituated to humans and attract numerous visitors.

L'Hoest's Monkey (*Cercopithecus lhoesti*) is one of 13 species of primates found in Nyungwe National Park—one of the highest densities of primates in Africa.



The Strange Weaver (*Ploceus alienus*) is one of the 27 bird species occurring in Nyungwe National Park that are endemic to the montane forests Albertine Rift. It frequents the forest interior.

The Regal Sunbird (*Cinnyris regius*) is one of the 27 bird species occurring in Nyungwe National Park that are endemic to the montane forests Albertine Rift.



SSENNP, AKA THE NYUNGWE NZIZA PROJECT

Building on the past efforts of USAID’s Destination Nyungwe project and in collaboration with the Government of Rwanda, USAID/Rwanda’s five-year program combined two projects—the DAI-implemented Nyungwe Nziza and the Wildlife Conservation Society (WCS)-implemented Sustaining Biodiversity Conservation in and around Nyungwe National Park—into one collective, synergistic effort to accelerate rural economic growth and improve biodiversity conservation in and around Rwanda’s Nyungwe National Park.

Through Nyungwe Nziza, USAID’s objective was to transform Nyungwe National Park into a viable ecotourism destination, generating sustainable and equitable income for local communities and as many other stakeholders as possible, including private investors, and creating employment for surrounding communities—thus providing economic incentives to conserve the rich biodiversity of the park. The focus of the project was twofold: inclusive ecotourism development for the benefit of local communities surrounding the park, and the leveraging of private sector investment in the management, construction, and maintenance of new and existing park infrastructure.

The Nyungwe Nziza project fell under USAID/Rwanda’s Strategic Objective 7: Expanded opportunities in rural areas, and specifically under Intermediate Result (IR) 7.4: Improved management of selected ecosystems.

The Nyungwe Nziza results framework (see Figure 2) involved three Sub-IRs:

- Improved capacity to sustainably manage ecosystems.
- Increased value of ecosystem services.
- Improved policy environment for environmental management.

Project activities covered these three Sub-IRs and the following Project Intermediate Results (PIRs):

- PIR 1: Nyungwe tourism products developed through increased private sector participation.
- PIR 2: Improved marketing and promotion of Nyungwe National Park.
- PIR 3: Improved integration between communities and ecotourism value chain.
- PIR 4: Improved policy and enabling environment for ecotourism.
- PIR 5: Improved RDB, private sector, and community capacity for ecotourism planning and management.

FIGURE 2: RESULTS FRAMEWORK FOR NYUNGWE NZIZA

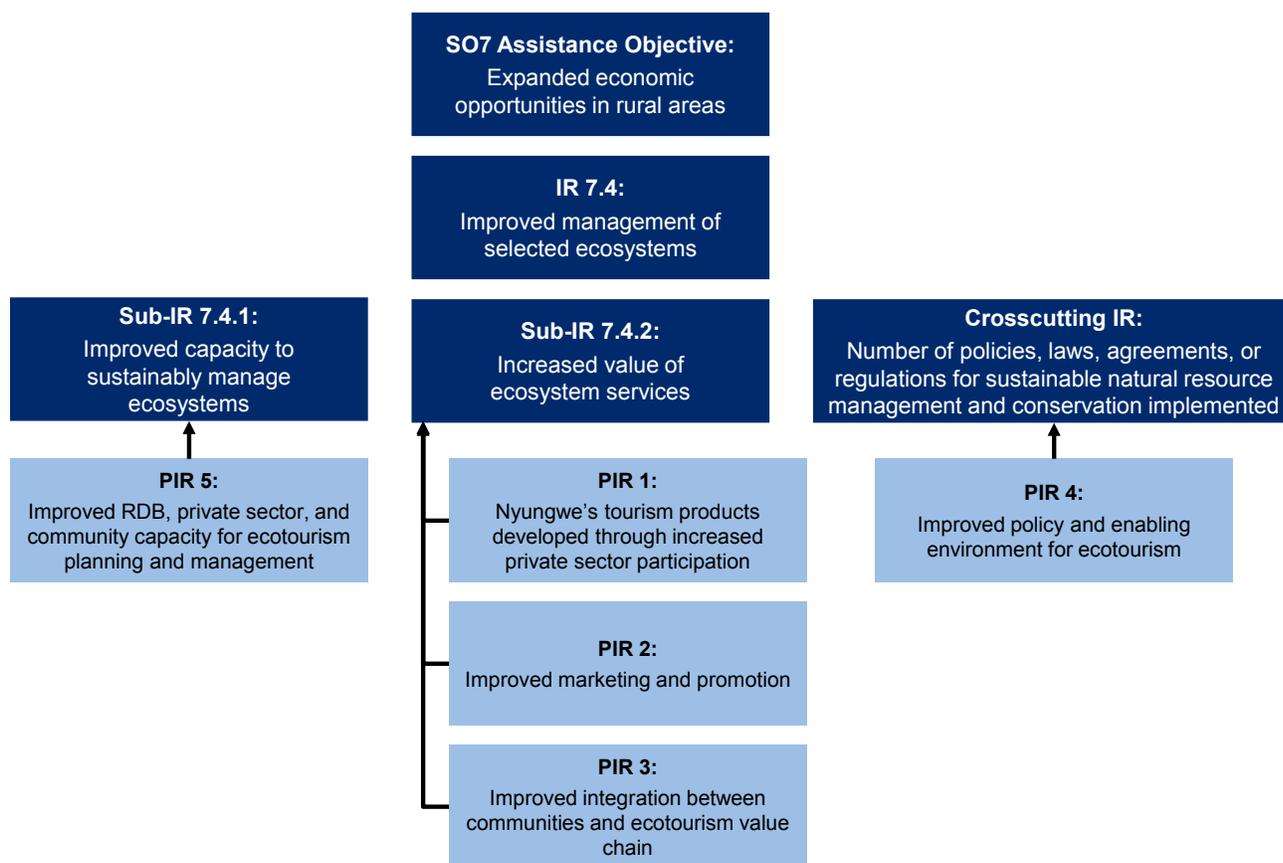


Table 1 presents the overarching performance targets and results achieved over the five years of Nyungwe Nziza implementation. The project exceeded three of the six targets; came close to meeting two other targets; and appears to have fallen short on one target, although adequate data are not yet available to confirm this.

Overall, the project improved the incomes of targeted groups and households, created job opportunities, and increased the number of rural people benefitting from improved management of natural resources. The number of visitors to Nyungwe National Park has more than doubled since 2010 when the project started, and revenues from tourism have increased significantly. At this time, we do not have adequate information to assess whether these successes have had a positive impact on the management of Nyungwe’s natural resources and biodiversity. WCS is in the process of completing the data collection and analysis for its Nyungwe conservation program; these data will provide information on changes in the incidence of illegal activities in the park and on biodiversity status based on transect. WCS is also planning to update its park-wide biodiversity assessment, which was last completed five years ago. These data will enable USAID to determine whether there have been improvements in natural resource management as a result of project activities.

TABLE 1: PERFORMANCE AGAINST STRATEGIC OBJECTIVE AND INTERMEDIATE RESULT TARGETS

Indicators	Life-of-Project Targets	Results	Comments
Strategic Objective 7: Expanded Opportunities in Rural Areas			
Percent change in rural income of target population	25% increase on baseline of Rwf 3.8 million	846% increase (Rwf 32.1 million)	The figures refer to the income generated by the five cooperatives that the project has supported.
Number of person-days of employment generated by U.S. Government assistance	450	25,759	The employment includes activities implemented by supported cooperatives, renovation of park buildings and infrastructure such as trails.
Intermediate Result 7.4: Improved Management of Selected Ecosystems			
Number of hectares under improved natural resource management	300	tbd	While planned management of bamboo stands did not materialize, supported cooperatives are implementing other natural resource management activities.
Number of visitors to Nyungwe National Park	48,500 (2011–2014) and 13,000 in 2014	38,596 (80%) and 9,506 in 2014 (73%)	The number of visitors each year has more than doubled from the 2009 baseline.
Increase in revenue generated by Nyungwe National Park	\$3 million	\$2,331,157 (78% of target)	The target refers to revenue from visitor fees and does not take into account revenue accruing to hotels and other businesses.
Number of people with increased economic benefits from sustainable natural resource management and conservation as a result of U.S. Government assistance around Nyungwe National Park	700	2,147	From March to December 2014, the number of beneficiaries was 581.

The following sections report project results against the Sub-IR and PIR targets.

PIR 1: NYUNGWE’S TOURISM PRODUCTS DEVELOPED THROUGH INCREASED PRIVATE SECTOR PARTICIPATION

In order to increase the value of ecosystem services (USAID/Rwanda’s Sub-IR 7.4.2), the Nyungwe Nziza project focused on brokering partnerships with private sector investors to support the development of new tourism products in and around Nyungwe National Park. In addition, the project supported RDB’s efforts to implement a policy for awarding concessions to private enterprises to operate some tourism facilities in the park.

Nyungwe Nziza used its small budget for grants (about \$200,000) and partnerships (about \$700,000) to leverage co-investment partnerships with the private sector and to provide direct financial support to community-based organizations interested in developing tourism products. Support to RDB for implementation of the new concessions policy involved direct financial support for upgrading tourism facilities in the park.

Overall, the results were mixed (see Table 2). Activities that involved direct financial support for infrastructure development performed well. Park infrastructure improvements have been implemented with considerable success and the quality of the design and workmanship is high. New trail signage, the Kamiranzovu boardwalk, bridges along trails, and upgrading of the Uwinka facilities have all added to the quality of visitors’ experience in Nyungwe. The upgrading of RDB’s facilities at Gisovu is vital toward the current efforts in establishing the area as a new tourism destination while the newly transformed visitor center near Gisakura park entrance will help to boost visitor experience at this highly visited western gateway of the park. These initiatives were completed before the project ended in March 2015. Similarly, the grants that Nyungwe Nziza provided to community tourism projects have been fairly successful. The Kitabi Cultural Village (Friends of Nyungwe), the Cyamudongo Tourism site, and the Kitabi Handicraft Cooperative are all generating income from tourism and are managing their businesses effectively.

TABLE 2: PIR 1 PERFORMANCE AGAINST TARGETS—NYUNGWE’S TOURISM PRODUCTS DEVELOPED THROUGH INCREASED PRIVATE SECTOR PARTICIPATION

Indicators	Life-of-Project Targets	Results	Comments
Number of units of ecotourism infrastructure built, refurbished, or equipped	6	10	These included ecotourism facilities developed through grants (2) and improvements to in-park infrastructure including visitors’ centers (3), the Kamiranzovu boardwalk, bridges on trails (10), signage for trails (13) and roads (14), and garbage bins (15).
Number of public-private partnerships developed	5	5	The project developed PPPs with three private companies, but two were terminated. Two other concession agreements await the approval of RDB.
Amount of private sector resources leveraged for ecotourism products	\$750,000	\$255,322	Funding leveraged through grants.

Indicators	Life-of-Project Targets	Results	Comments
Number of new ecotourism infrastructure products developed	5	6	Two community-based ecotourism projects were supported (Kitabi Cultural Village and Cyamudongo). Two more community projects were upgraded. Two new visitors' centers were developed in Gisovu and Gisakura.
Number of concession opportunities and ecotourism products identified and assessed	5	9	Assessments included accommodation development at three sites inside the park; tourism products at Gisovu and Uwasenkoko; the Uwinka visitors' facilities; and three accommodation locations outside the park (Gisovu, Kitabi, and Cyamudongo)
Number of concession opportunities taken over by private investors	5	2 (3 more are pending)	RDB has awarded two restaurant concessions to Golden Monkey Group and three more tourism concessions are pending (Gasare, Karamba, and Gisovu).

In contrast, leveraging financial support from the private sector for tourism investments proved extremely challenging. Owing to concerns about poor local infrastructure, and because the grantees were unable to deliver co-financing, grants to enterprises such as the Gisovu Tea Company and Gervais Habimana's Turaco Lodge to develop tourism accommodation were not fully executed. The grant-supported PPP with Golden Monkey Group for construction of a hotel in Kitabi but was terminated before completion of the work because of lack of co-financing from the grantee.

The awarding of concessions to private sector operators to provide tourism services within Nyungwe National Park has proceeded slowly. The Concessions Policy was approved by the Cabinet in March 2013, but implementation has lagged. To date, RDB has awarded two concessions to Golden Monkey Group to provide food services in the park. The one in Kitabi has since been closed by the contractor for lack of business. RDB is developing plans to award larger contracts to private operators for the tourist accommodation and associated facilities at Gisovu (supported by Nyungwe Nziza) and two undeveloped locations in the park at Karamba and Gasare.

HOW HAS NYUNGWE NZIZA MADE A DIFFERENCE?

As with the earlier USAID initiative in Nyungwe (the Destination Nyungwe Project – DNP), the most visible contributions that Nyungwe Nziza made are the improvements to park infrastructure—notably the visitors' centers and trails. The importance of these cannot be overestimated because they have significantly improved the experience of visitors. The project's support to community groups involved in tourism enterprises was also significant, but it will take some time before the viability of these initiatives can be fully assessed.

Success Story: Trail Maintenance and Management Plan

Nyungwe National Park has an extensive network of walking trails, which are a vital part of the park's tourism product. These trails were constantly being damaged by vegetation growth and soil erosion from water run-off, hence the constant need for repair and maintenance activities to keep trails open and safe for visitors. With the assistance of the USNPS's trail specialists, a Nyungwe National Park Trail Management Plan and Maintenance Manual was developed, with detailed recommendations on the required improvements, particularly on the most popular trails. In addition, and over the past three years, hands-on training was conducted in the field with local trail maintenance cooperatives and park staff. The training covered construction of retaining walls, bridges, and boardwalks for future maintenance of the infrastructure.

Nyungwe Nziza’s support for developing the concessions policy created new opportunities for RDB to catalyze private sector engagement in the management of tourism facilities. Although progress has been slow, there is a clear commitment on the part of RDB to implement the policy. The challenge will be finding private enterprises that are willing to invest in the concessions. Nyungwe Nziza’s experience was that the private sector and banks are reluctant to make investments in tourism in and around Nyungwe. There are one or two exceptions to this: the Nyungwe Forest Lodge at Gisakura is a major investment made by Dubai World that is attracting substantial numbers of visitors—5,000 guest nights in 2014. Although we do not have information on the financial viability of this investment, the occupancy rate of about 60 percent (estimated revenue of about \$1 million/year based on accommodations alone) suggests that there is probably a reasonable return on investment. Clearly, there are investment opportunities in the tourism sector around Nyungwe, but the products must be tailored to what the market demands—and the marketing must be designed accordingly.

LESSONS LEARNED

Leveraging private sector investment in tourism in and around Nyungwe National Park has proven challenging, even though there is strong evidence that the demand for services is high. Nyungwe is an extremely attractive tourist destination. It is the largest remaining expanse of montane forest in the Albertine Rift landscape and harbors many rare and endangered species, 13 species of primates, and more than 300 avian species, including 75 percent of all of the species endemic to the Albertine Rift. Moreover, Nyungwe is within easy reach of an even more “compelling” tourism destination—Volcanoes National Park—which attracts more than 20,000 visitors each year to see Mountain Gorillas. Clearly, Nyungwe has considerable potential, but this can only be realized if there are adequate services and infrastructure to support visitors. Nevertheless, few businesses or banks have been willing to commit to investing in these upgrades, even with financial incentives (grants) available through the Nyungwe Nziza project.

The reasons for this reluctance are unclear. In part, it may be a “chicken-and-egg” scenario—prospective investors are waiting for park facilities to meet visitor expectations—although the apparent success of the Nyungwe Forest Lodge suggests that this concern is unwarranted. In part, it may be risk aversion based on fears that the global economy—certainly the European economy—is still weak and tourism will be slow to increase in destinations where travel is expensive. Again, however, the experience of Volcanoes National Park indicates that high-profile destinations will always have a strong client base.

Nyungwe has long relied on the support of donors to develop and maintain infrastructure. The investments of the Government of Rwanda and RDB are small in comparison to those of international donors such as USAID (tourism) and the World Bank (roads). Even as Nyungwe’s tourism revenues increase, there is no guarantee that the Rwandan Government will increase its financial contributions for development, operations, and maintenance. Any future support for Nyungwe provided by USAID should be accompanied by clear commitments from the government and RDB that adequate budget support will be provided to maintain roads and other infrastructure.

Nyungwe Nziza’s support for community-based tourism demonstrated that there is high potential for local groups to benefit from small initiatives that provide services to tourists. In some cases, the quality of these services still needs to be improved, but the groups themselves are functioning reasonably well and have the potential to become self-sufficient. Any future support from USAID or other donors should avoid targeting the existing groups and treating them as “donor darlings” since this can quickly lead to donor dependence and eventual failure.



The Nyungwe Nziza project completely renovated the boardwalk that crosses part of the Kamiranzovu Swamp—which is prime habitat for Grauer’s Rush Warbler (*Bradypterus graueri*).



Nyungwe Nziza made significant improvements to trails in Nyungwe National Park, such as this trail between the Uwinka Visitors’ Center and the canopy walkway.



The project helped renovate the reception and other buildings at the Uwinka Visitors’ Center in the heart of the National Park.



The canopy walkway below the Uwinka Visitors’ Center is the only one in East Africa. Originally constructed by USAID/Rwanda’s Destination Nyungwe Project, it was inaugurated in 2009 and maintained with support from Nyungwe Nziza.

PIR 2: IMPROVED MARKETING AND PROMOTION OF NYUNGWE AMONG TARGETED SEGMENTS

Nyungwe Nziza recognized the need to improve the visibility and brand of Nyungwe National Park in tourism markets in Rwanda and internationally. Currently, about 50 percent of visitors to the park are resident in Rwanda; the remainder come from key markets around the world—South Africa, Europe, the United States, and elsewhere. As with most marketing efforts, sales are not driven solely by the product and the promotion. The price of the product and the geography (place) are also important factors in designing the marketing strategy.

Nyungwe Nziza conducted early market research and analysis through a survey of international tour operators. The project also organized media tours, sponsoring travel writers and other members of the media to visit Nyungwe, and supported RDB’s participation in trade fairs, including the World Travel Market in London, the International Tourism Bourse, and the UK Bird Fair.

Nyungwe Nziza also supported the development and promotion of internet-based information services about Nyungwe National Park, including using social media such as Twitter, Facebook, YouTube, and blogs. The Nyungwe National Park website was integrated with RDB’s site, rwandatourism.com.

TABLE 3: PIR 2 PERFORMANCE AGAINST TARGETS— IMPROVED MARKETING AND PROMOTION OF NYUNGWE AMONG TARGETED SEGMENTS

Indicators	Life-of-Project Targets	Results	Comments
Number of people attending annual promotional events held in or about Nyungwe	500	600	Includes 400 people participating in World Tourism Day in 2013.
Number of social media channels, including blogs, discussing Nyungwe National Park in a positive light	8	8+	See <i>Nyungwe Nziza: Final Summary Market Development Report</i> , January 2015.
Number of online marketing products developed	3	3	The Nyungwe Nziza website, Percy Lipinski’s World Press Media Center (YouTube), and Bea Broda’s YouTube channel.

Overall, performance met expectations, exceeding the target for participation in promotional events and meeting the targets for internet-based informational and marketing products.

The project’s engagement with the international tourism industry and, in particular, with well-known travel writers was instrumental in Nyungwe receiving several prestigious international awards. These included the British Guild of Travel Writers Best Overseas and Best Global Project Awards and the Society of American Travel Writers Phoenix Award for “Outstanding accomplishments in conservation, preservation, beautification and environmental achievements.” The *National Geographic Traveler* named Nyungwe as “a best trip for 2014”—one of only two destinations in Africa to receive such acclaim. At the SATW awards ceremony, the project was recognized for its contributions to ecotourism, biodiversity, and local communities. SATW Co-Chair Cheryl Hargrove said that “the SATW Phoenix Committee and Board of Directors selected the Nyungwe Nziza Project after studying many projects in many countries. They voted for the Nyungwe Nziza Project because it is a great example of the type of project that should be replicated around the world.” The project’s efforts also led to several articles in travel publications

such as *National Geographic Traveler*, *Rough Guides*, and *The Los Angeles Times*. CNN named Nyungwe as one of the top 10 “safaris” in Africa.

HOW HAS NYUNGWE NZIZA MADE A DIFFERENCE?

In 2009, Nyungwe generated only 12 percent of the revenue from the country’s national parks; Volcanoes National Park generated 49 percent and Akagera, 39 percent. While Nyungwe’s contribution to total National Park revenues has not increased significantly, its percentage of the total number of visitors has steadily increased—in 2014, it reached 13.5 percent. As a result, in part, of Nyungwe Nziza’s marketing efforts, the revenues from Nyungwe increased by 137 percent between 2009 and 2014 and the number of visitors more than doubled. Between 2013 and 2014, there was a 32 percent increase in the number of visitors to Nyungwe—the highest increase of any of Rwanda’s National Parks. Over the same period, there was a 37 percent increase in the park’s revenues, compared with 12 percent for Akagera and 18 percent for Volcanoes. It should be noted that part of the strategy to increase the number of visitors was to restructure the visitor fees—hence the disproportionate low increase in revenues relative to the increase in the number of visitors. This is discussed below under PIR 4.



Rica Rwigamba, RDB’s former Head of Tourism and Conservation, receiving the British Guild of Travel Writers’ awards in 2014.

The marketing strategy developed by Nyungwe Nziza recognized that most visitors choose Nyungwe neither for attractions such as rare birds or primates nor for products such as the canopy walkway. Rather, what Nyungwe offers is a relatively quiet escape to nature where there is an array of different activities and sights. The project recommended several initiatives to enhance visitors’ experience.

Nyungwe Nziza helped RDB design and produce an array of informational and promotional materials for distribution at trade fairs and to the general public. These included the following:

- An overall Escape to Nyungwe brochure with map.
- Nyungwe special interest brochures—cultural tourism, birding, canopy walk—all under an Escape to Nyungwe theme.
- Existing tour itineraries for target markets, especially groups.
- Wholesale pricing information for tour operators for specific activities and packages.
- Translated materials for tour operators.
- www.nyugwepark.com website
- Press releases.

Success Story: Bird-Watching Action Plan

Nyungwe National Park is one of the best bird-watching destinations in Africa and is considered by the African Birding Club to be the “jewel in Africa’s crown.” There are more than 280 bird species registered; a vast majority of them are rare forest species, including 27 Albertine Rift endemic species. In order to enhance this tourism product, the USNPS, under the auspices of Nyungwe Nziza, developed a Bird-Watching Action Plan for Nyungwe, including product development and marketing strategies that RDB and the Rwanda Birding Association (RBA) used as a basis to develop the National Avitourism Strategic Plan for Rwanda in 2013.

LESSONS LEARNED

To be successful, marketing must be based on a well-conceived and purposefully executed strategy. The strategy must be built on rigorous data from the tourism industry and on the know-how of industry experts. The marketing materials must be of high quality and must be tailored to the needs of different markets. A “one-size-fits-all” approach will not produce the desired results.

Going forward, RDB must continue to invest in updating and upgrading marketing materials—print products as well as web-based information. Nyungwe Nziza helped develop some video products that can be accessed on YouTube, but there are opportunities for much more to be done. The story of Nyungwe, its wildlife, and the communities around the park is compelling and warrants producing a series of short videos that can be posted to different websites where they can be viewed by tour operators and potential visitors. The continued participation of RDB at international trade shows will be essential, but the marketing materials provided to potential investors and tour operators must be of the highest standards. Nyungwe Nziza’s efforts to promote Nyungwe by engaging international travel writers and sponsoring visits to the park generated a great deal of “buzz” in the industry. RDB should continue to reach out to travel magazines, especially in high-potential markets such as Australia and South Africa.



Grauer's Rush Warbler (*Bradypterus graueri*) is a rare endemic bird found only in montane swamps of the Albertine Rift. It is a globally threatened species.

The Mountain Oriole (*Oriolus percivali*).



The Eastern Mountain Greenbul (*Andropadus nigriceps*).

The Ruwenzori Double-Collared Sunbird (*Cinnyris stuhlmanni*) is one of the 27 bird species occurring in Nyungwe National Park that are endemic to the montane forests Albertine Rift.



PIR 3: IMPROVED INTEGRATION BETWEEN COMMUNITIES AND THE TOURISM VALUE CHAIN

The goal of PIR 3 was to support the development of tourism initiatives within communities around Nyungwe National Park, to increase economic benefits accruing to members of the community, and to thereby reduce threats from human incursions and other illegal activities in the park. Nyungwe Nziza provided grants to local community groups to develop tourism products and attempted to broker private sector investment in these initiatives. Overall, the products that have been developed are attracting visitors and generating revenue. The community organizations have the capacity to manage the tourism enterprises and to administer the financial operations of the groups.

Engagement of the private sector in supporting these community projects has not met expectations. Several community groups have contracts to provide products and services to private sector firms, but there has been little direct financial support to any of the groups. Once again, this suggests that local businesses are not willing or able to devote financial resources to such community development initiatives unless they are simple commercial transactions such as buying labor or produce.

TABLE 4: PIR 3 PERFORMANCE AGAINST TARGETS—IMPROVED INTEGRATION BETWEEN COMMUNITIES AND THE TOURISM VALUE CHAIN

Indicators	Life-of-Project Targets	Results	Comments
Threat levels in selected critical buffer zone areas reduced (percentage reduction)	0	tbd	The Threat Reduction Assessment was revised to provide greater detail on site-specific threats to biodiversity. WCS monitoring data will help gauge changes in threat levels over the past five years.
Number of community-based attractions and tours available for sale	4	4	Four community groups have functioning tourism enterprises: Friends of Nyungwe (Kitabi Cultural Village), Kitabi Handicrafts, Cyamudongo Tourism Promotion, and Banda.
Number of consolidated ecotourism and related micro, small, and medium-sized enterprises that are fully operational	3	3	Three community groups are now fully operational: Koperative Twiyubak'e Kitabi, Kitabi Handicrafts, and the Duhuze Imbaraga Cooperative.
Number of community/private sector partnerships developed and operating	4	8+	Golden Monkey Group established several local partnerships to support construction of the hotel in Kitabi; the Duhuze Imbaraga Cooperative has supply contracts for mushrooms and vegetables with seven hotels and restaurants.
Amount of private sector resources leveraged for community initiatives	\$100,000	tbd	The Duhuze Imbaraga Cooperative's supply contracts are now generating about \$200/month.
Increased capacity of targeted community organizations/cooperatives to manage community-based ecotourism activities	15%	tbd	The Koperative Twiyubak'e Kitabi and the Duhuze Imbaraga Cooperative have received organizational development, business management, and technical training.

The four community groups that are engaged in tourism activities are Friends of Nyungwe (Kitabi Cultural Village, lodging, camping, and food services), Kitabi Handicrafts (crafts, food services, and

washroom facilities), Cyamudongo Tourism Promotion (chimpanzee trekking, food services, handicrafts, and cultural shows such as dancing), and Banda village (cultural events, trail rehabilitation work, community walks, and camping facilities). They are managing the income from these activities and using the funds to support their enterprises as well as the participating households. Table 5 summarizes the results to date.

TABLE 5: COMMUNITY-BASED TOURISM INITIATIVES SUPPORTED BY NYUNGWE NZIZA

Community Group	Membership	Tourism Activities	Revenue to Date	Use of Funds
Friends of Nyungwe	57 members (17 women)	Cultural site with some accommodation and food services	\$13,747 (total); \$2,150 in the last quarter of 2014	Provide four fulltime jobs and other intermittent jobs.
Kitabi Handicrafts	42 members (39 women)	Handicrafts, food services, toilet facilities	\$7,900 (total); \$1,500 in the last quarter of 2014	Net income is divided among members annually. Some used to cover health insurance.
Cyamudongo Tourism Promotion	62 members (40 women)	Guide services, food services, handicrafts, cultural activities	\$8,713 (total); \$800 in the last quarter of 2014	30% of funds are reinvested and 70% go to the participating members. They have started a loan program.
Banda Village – Pillar of Nature Tourism Promotion	92 members (46 women)	Cultural activities, food services	\$10,961 (total)	Revenue was shared among the members but the activity has not been sustained.

In addition, the Koperative Twiyubak'e Kitabi and the Duhuze Imbaraga Cooperative (in Bushekeri) provide agricultural produce to hotels and restaurants around the park. Their operations started in late 2014; in early 2015, they started harvesting and selling their produce.

HOW HAS NYUNGWE NZIZA MADE A DIFFERENCE?

Before the launch of the Nyungwe Nziza project in 2010, there were very few functioning community-based tourism initiatives around Nyungwe National Park. DNP supported the Kitabi Handicraft Cooperative, but its operations ceased at the end of that project. Nyungwe Nziza not only helped revitalize the Kitabi group and launch new initiatives, but also strengthened organization capacity through training and coaching. The Banda group was also supported by DNP and later by Nyungwe Nziza, but changes in leadership have severely undermined its operations. Other than the Banda group, the community enterprises now function as sustainable businesses with transparent governance, clear administrative procedures, and sound management.

At this time, the revenues are still small for all of the groups, but each group has a clearly defined plan for how it will use the income. Some have used the funds to capitalize loan programs and others are helping to finance their members' access to health insurance. Such initiatives are providing tangible benefits to members of the community—hence, there is an increased recognition that Nyungwe National Park is an asset that is improving people's livelihoods.

LESSONS LEARNED

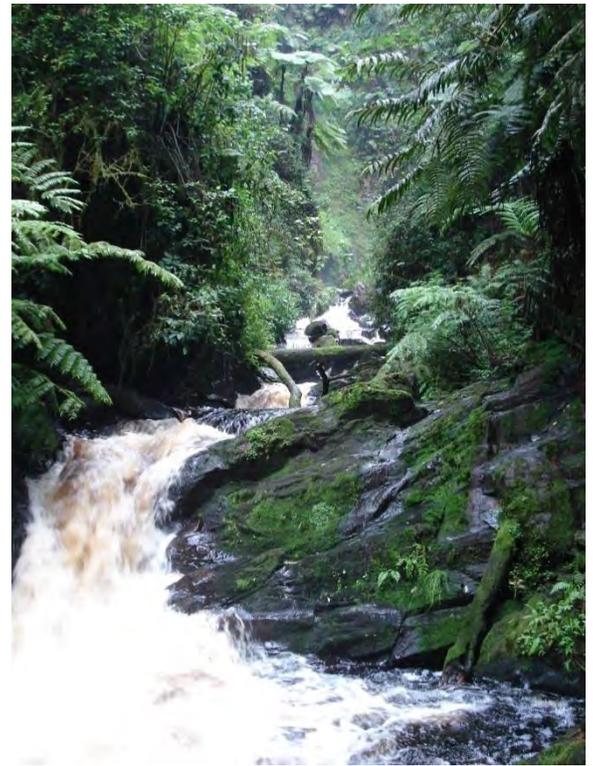
The support that the Nyungwe Nziza provided to the community tourism groups through grants, technical assistance, and marketing assistance helped establish functional small enterprises, but they needed additional support to strengthen their organizational capacity. The project provided this support, and these groups are now able to pursue new business opportunities and build partnerships with private tour

operators, local governments, and the RDB—relationships that will enable the groups to grow their businesses.

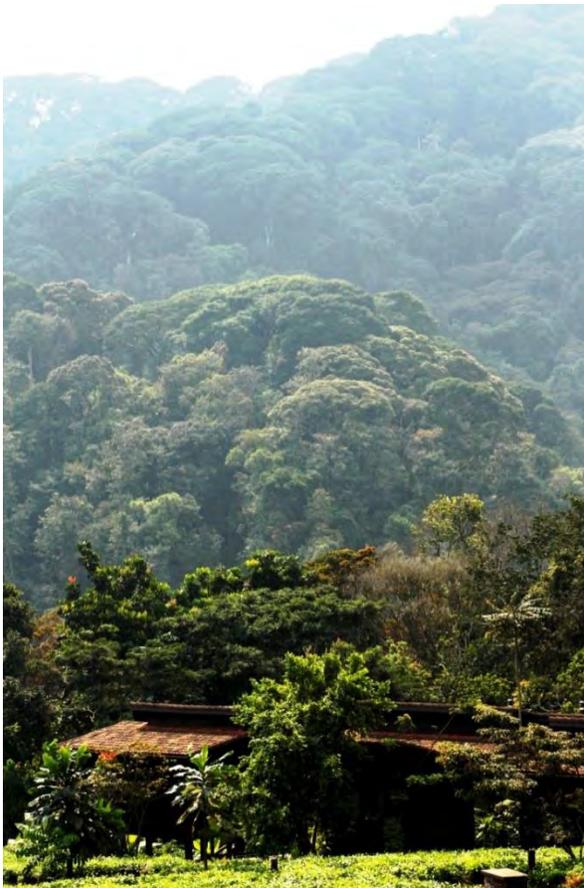
Only a small fraction of the more than 9,000 visitors to Nyungwe National Park are availing themselves of the services offered by community tourism enterprises. The potential for these businesses to grow is significant provided that the quality of the services and other products meets the expectations of the prospective clients. Any future support to community tourism groups should focus on establishing quality standards for guide and food services, handicrafts, and other products.



Newtonia trees (*Newtonia buchanani*) are among the largest and most striking trees in the Nyungwe Forest. Their trunks and boughs are typically draped with mosses, ferns, and orchids.



The waterfall trail is regarded by many visitors as one of the most scenic in Nyungwe National Park.



The Nyungwe Forest Lodge near Gisakura is a major tourism investment made by the Shamwari Group. It is located immediately adjacent to Nyungwe National Park in an area of tea plantations.



A family group of Angolan Colobus Monkeys (*Colobus angolensis*) in Nyungwe.

PIR 4: IMPROVED POLICY AND ENABLING ENVIRONMENT FOR ECOTOURISM

The goal of the Nyungwe Nziza project was to improve the enabling conditions for greater private sector and community engagement in tourism operations in and around Nyungwe National Park. The project emphasized the need for a new pricing structure for entrance fees as well as the development of a policy on private sector concessions for tourism operations in the park—notably, accommodation and food services. Nyungwe Nziza partnered with the USNPS to review the pricing of entrance fee. USNPS recommended reducing the fees in certain cases, and RDB implemented these changes in 2013.

TABLE 6: PIR 4 PERFORMANCE AGAINST TARGETS—IMPROVED POLICY AND ENABLING ENVIRONMENT FOR ECOTOURISM

Indicators	Life-of-Project Targets	Results	Comments
Number of policies, laws, agreements, or regulations promoting sustainable natural resource management and conservation that are implemented as a result of U.S. Government assistance	3	2	RDB approved the new price structure for Nyungwe in July 2013 based on the project's recommendations. RDB adopted the "limits of acceptable change" approach to impact assessment in 2012. The National Concessions Policy was adopted by the Cabinet in March 2013 but has yet to be implemented.
Increased visitor satisfaction	40%	tbd	RDB is currently conducting a visitor satisfaction survey.

Through the partnership with the USNPS, the project developed a draft national concession policy and a concessions action plan for Nyungwe. The policy was approved by the Rwandan Cabinet in 2013. Two RDB staff members—the Nyungwe National Park's Chief Warden, Louis Rugerinyange, and the Head of Product Development, Faustin Karasira—travelled to the United States in 2014 for USNPS training on concession planning and management (see PIR 5). Subsequently, Greg Kimmitt of the USNPS helped RDB develop preliminary tender documents for awarding concessions in the park. In addition, through the partnership with USNPS, Financial/Market Analyst William Gordon helped RDB revise the feasibility analysis for the proposed concessions.

Three sites for possible tourism concessions have been identified: at Gisovu, where Nyungwe Nziza supported the renovation of existing buildings and infrastructure (accommodations, food services, and offices), and at Gasare and Karamba—both on the main road that passes through the park. RDB has yet to release the tender documents, but the expectation is that a contract or contracts will be awarded in mid-2015 and that tourism facilities will be operational at Gisovu in 2016 and at Gasare or Karamba in 2017.

Success Story: Rwanda National Concessions Policy

Concessions are a powerful mechanism to enhance tourism development and sustainable natural resource management. They increase the economic value of protected areas and other government land in national development, while maintaining and strengthening the conservation of biodiversity and the maintenance of the ecological integrity of natural resources.

In 2011, and with the Rwandan Government's commitment to developing a private sector-led economy, Nyungwe Nziza engaged the USNPS Commercial Services (Concessions) Team and assisted RDB in finalizing the National Concessions Policy, including the development of procedures and guidelines for financial and other related aspects of commercial services management. Eventually, the National Concessions Policy was approved by the Cabinet in April 2013. In May 2014, and in support of this policy's implementation, USNPS facilitated a two-week concessions training for two RDB staff members in the United States in preparation for the development of the concession contracts and budgets for three pioneer sites, which RDB intends to issue out to bid by December 2014.

HOW HAS NYUNGWE NZIZA MADE A DIFFERENCE?

While tourism concessions in National Parks are not new to Rwanda (African Parks has a concession in Akagera, for example), Nyungwe National Park has no private concessions other than for food services at Uwinka (another concession at Park Headquarters in Kitabi was cancelled). In partnership with the USNPS, Nyungwe Nziza worked to produce a Cabinet-approved concessions policy and finalize the tender documents for awarding major concessions in Nyungwe.

Revision of the entrance fees for Nyungwe in mid-2013 has likely contributed to the increased number of visitors in 2014 (a 32 percent increase in visitors between 2013 and 2014, compared with a decrease in the number of visitors between 2012 and 2013). Undoubtedly, other factors have contributed to the increase in 2014—notably the more concerted marketing effort and increased visibility in the international press—but the reduced entrance fees was certainly a contributor.

Success Story: Optimization of Activity Fees Study

One reason given by tourism stakeholders for the low uptake of Nyungwe National Park's alternative visitor activities was poor packaging and pricing of the existing attractions. Previously, the park had a complicated visitor activity pricing structure, which depended mostly on the length of hiking trail distances to be undertaken. In order to address this challenge, in September 2011, Nyungwe Nziza fielded USNPS Fee Program Specialist Jane Moore and DAI Tourism Specialist Miguel Baca to conduct a Pricing Optimization Study for improved visitor satisfaction for Nyungwe National Park. Following the recommendations of the study, RDB's senior management approved the new price structure in July 2013.

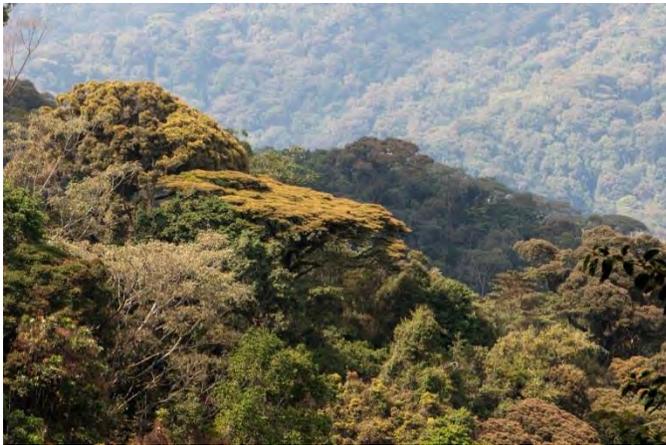
LESSONS LEARNED

The support that Nyungwe Nziza has provided to RDB has resulted in some fundamental changes to the way Nyungwe National Park is being managed. Initial indications are that these changes are having a positive impact on the number of visitors. Going forward, RDB will need to build on this foundation and continue to invest in improvements in the park infrastructure as well as in the marketing of its attractions. Most importantly, RDB will need to award two major concession in the next 12 months and oversee their implementation. This will require expertise and know-how that may not be available in-house. RDB will have to ensure that its budget allocations for Nyungwe are aligned with the needs of the park. Donor funding and technical assistance cannot be the basis for future planning. The past reliance on such sources of funding cannot continue and RDB must make some hard choices about how it allocates its budget. The organization is in the enviable position of being able to retain the revenues from park entrance fees, and these funds are allocated to the National Parks to cover recurrent costs and special operations as needed. Covering the salaries of park staff and allocating 10 percent of park revenues to neighboring communities (for community projects and as compensation for wildlife conflicts such as crop losses) can be regarded as “recurrent costs.” In addition, there must be an adequate budget to cover operations and maintenance—and it is these costs that historically have been covered by donors.

Some major expenditures that will be needed in the near future include upgrading and maintenance of access roads—some of which will be funded by other Rwandan Government agencies—trail maintenance, and maintenance of facilities such as the Uwinka, Gisakura, and Gisovu visitors' centers.



Blue Monkey (*Cercopithecus mitis*)—one of the 13 species of primates found in Nyungwe National Park.



The forest canopy in the center of Nyungwe National Park is characterized by large, broad-crowned trees such as *Newtonia buchanani* and *Parinari excelsa*.



The Chestnut-Throated Apalis (*Apalis porphyrolaema*) is another of the 27 bird species found in Nyungwe National Park that are endemic to the montane forests of the Albertine Rift.



The Purple Swamp Orchid (*Eulophia horsfallii*) growing in the Kamiranzovu Swamp.



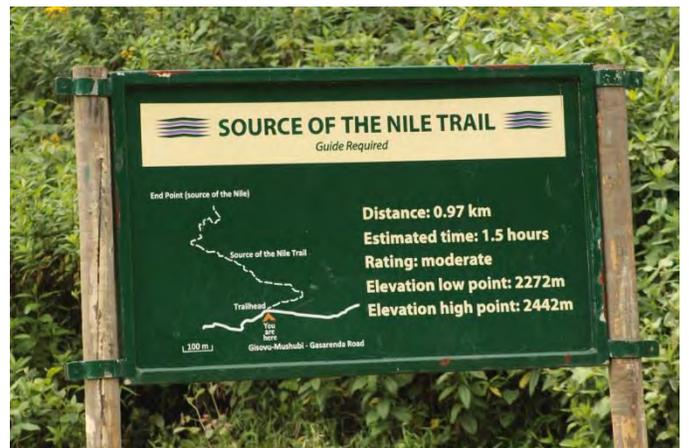
L'Hoest's Monkey (*Cercopithecus lhoesti*).

The Black and Yellow Swallowtail or Emperor Swallowtail (*Papilio hesperus*).



The swimming pool at the Nyungwe Forest Lodge at the edge of Nyungwe National Park near Gisakura.

Trail-head sign installed by the Nyungwe Nziza project near Gisovu at the northern boundary of Nyungwe National Park. The location is said to be the most distant point from the river's mouth, which is about 6,800 km downstream.



PIR 5: IMPROVED RDB AND PRIVATE SECTOR CAPACITY FOR ECOTOURISM PLANNING AND MANAGEMENT

All of Nyungwe Nziza’s support for Nyungwe National Park was designed and delivered in close collaboration and partnership with RDB. While much of this work targeted community groups, it also included capacity building for RDB management and technical staff as well as other park employees. Under PIR 1, the project provided hands-on-training for upgrading park infrastructure such as trails and facilities such as visitors’ centers. Under PIR 2, the project helped build the marketing skills of RDB staff, providing training and supporting their participation in international trade shows and exchange visits. Under PIR 3, RDB staff has been integrally involved in Nyungwe Nziza’s engagement with local communities and with private sector investors. Under PIR 4, the project’s efforts to revise the park’s fee structure, to develop a concessions policy, and to design and implement improved monitoring systems were all implemented jointly with RDB staff.

This approach of “learning by doing” has been the cornerstone of Nyungwe Nziza’s capacity-building program. While the project’s consultants—drawn from U.S. small businesses and from the USNPS—provided critical expertise, their assignments were implemented conjointly with RDB staff.

TABLE 7: PIR 5 PERFORMANCE AGAINST TARGETS—IMPROVED RDB AND PRIVATE SECTOR CAPACITY FOR ECOTOURISM PLANNING AND MANAGEMENT

Indicators	Life-of-Project Targets	Results	Comments
Number of people receiving U.S. Government-supported training in natural resource management and/or biodiversity conservation	750	1,456	Trainees: 781 men and 675 women (46%).
Number of people receiving training in tourism management	600	1,015	Trainees: 710 men and 305 women (30%).
Increased capacity of RDB to assess the potential environmental impact of tourism in Nyungwe National Park	1	1	Park authorities started implementing the “limits of acceptable change” action plan in November 2013.
Number of guide certification and other “official recognition” guide training programs in place and functioning	2	2	The project conducted training and coaching of park guides in 2012 and 2013. A plan for expanding certified training of interpretive guides was also developed.
Increased capacity and ability of RDB to conduct market analyses and to provide accurate and timely market intelligence to local communities and the public and private sectors	2	2	In 2013, the project delivered training in financial and market analysis. In 2014, it provided training on developing business prospectuses, contracts, and budgets for RDB concessions staff.

Nyungwe Nziza met or exceeded all of its targets under PIR 5. Significantly more people were trained in improved natural resource management and tourism management than was originally expected. Moreover, the participation of women was high—averaging 40 percent across all training activities.

HOW HAS NYUNGWE NZIZA MADE A DIFFERENCE?

Nyungwe Nziza supported capacity building of RDB staff across a broad spectrum of positions, from management to field staff. The study tour to the USNPS involved Nyungwe's Chief Warden and the current acting Head of RDB's Tourism Department, but USNPS technical staff also trained front-line RDB staff ranging from conservation experts to field guides. This approach has been critical for sustaining impact. Already, there are indications that some senior RDB staff with whom the project worked will be moving to new posts within RDB. As their current positions are vacated, there is a cadre of up-and-coming staff members who have been trained by Nyungwe Nziza and have the skills and knowledge to take on the more senior responsibilities.

Similarly, the training that Nyungwe Nziza provided to community groups was very much hands-on and focused on practical skills that the trainees could apply immediately to improve their ecotourism and natural resource management efforts. The support to farming groups used the principles of farmer field schools to deliver on-site training through field demonstrations.

LESSONS LEARNED

The partnership between Nyungwe Nziza and the USNPS blossomed into a strong working relationship between RDB and the USNPS that will be sustained beyond the life of the project.

Although several senior RDB staff feel that the future viability of Nyungwe National Park is still dependent on donor funding, Nyungwe Nziza successfully built RDB capacity and transferred the skills needed to manage the park and grow it into an internationally renowned destination. Nyungwe's future will rest more on the Government of Rwanda's and RDB's commitment to providing adequate funding to maintain park infrastructure and sustain the marketing efforts that Nyungwe Nziza implemented.

NYUNGWE NZIZA GRANTS PROGRAM

The Nyungwe Nziza project used grants and partnership funds to support community development activities and to leverage co-financing from private sector tourism investors. Table 8 summarizes the grant activities.

TABLE 8: NYUNGWE NZIZA GRANT ACTIVITIES

Grant Number	Grantee	Implementation Start Date	Grant Total Expenses (to Dec. 31, 2014)	Returns on Investment – Revenues (to Dec. 31, 2014)
G-Kig-003	Pillar of Nature and Tourism Promotion Cooperative	September 2011	\$17,474.32	\$10,961.00
G-Kig-004	Cyamudongo Tourism Promotion Cooperative	June 2012	\$ 58,429.28	\$8,713.30
G-Kig-005	Kitabi Handicraft Women's Cooperative	September 2011	\$14,214.97	\$7,900.00
G-Kig-006	Friends of Nyungwe Cooperative	June 2012	\$57,595.26	\$13,747.46
G-Kig-013	Duhuze Imbaraga Cooperative (DIC)	November 2014	\$9,012.06	\$389.61
G-Kig-014	Koperative Twiyubak'e Kitabi (KOTWIKI)	November 2014	\$9,889.25	--
Total			\$181,448.71	\$41,711.37

Although the returns on investment (ROI) listed above are fairly low, in most cases the revenues being generated are being sustained and the grantees are reinvesting a portion in other income-generating activities. In the case of the two newest grants—DIC and KOTWIKI—the income stream in January and February of 2015 was steady, and it is very likely that the groups will have adequate funds to cover the cost of future inputs and be able to sustain their activities. In effect, despite the low short-term ROI, Nyungwe Nziza helped these community groups launch income-generating activities that are not only sustainable but also hold the promise of being scaled up by using income as seed capital for other investments. The true ROI—measured in terms of financial sustainability and organizational capacity—more than justifies USAID's investments in these grant activities.

In January 2011, the Impact Nyungwe Contest was launched to identify opportunities for developing ecotourism and addressing the main threats to biodiversity around Nyungwe National Park. The request for concept papers was distributed to 12 cooperatives that were identified during the initial implementation phase of the project, as well as to 30 sectors in five districts bordering the park. Twenty concept papers were received from nine sectors.

SGF Banda PNPT, Cyamudongo Tourism Promotion Cooperative, Friends of Nyungwe, and Kitabi Handicraft Women's Cooperative were invited to develop full proposals for projects that would generate sustainable income and employment from ecotourism and related activities. The premise was that maximizing benefits to these communities would increase local support for conservation of Nyungwe National Park.

Nyungwe Nziza conducted an initial economic baseline survey and capacity needs assessment for each grantee. The project then delivered capacity-building training and provided post-training coaching in business management, including financial management, bookkeeping, business plan development,

marketing, cooperative management and governance, literacy and numeracy, and basic communication skills. Training on gender mainstreaming was also provided for all four groups.

In 2012, a value chain assessment revealed that the hotels and lodges around Nyungwe sourced most of their fruits and vegetables from suppliers in Kigali and even Uganda. The prices of the commodities were high and there was considerable loss during transport. Nyungwe Nziza identified an opportunity for hotels and restaurants to source produce locally and thereby both reduce costs and increase community incomes. A key constraint was the need for high-quality produce. The project identified two cooperatives as grantees for agricultural promotion initiatives: Duhuze Imbaraga Cooperative in Bushekeri and Twiyubak'e Kitabi Cooperative in Kitabi. The project worked with the leadership of these cooperatives to build their agribusiness skills and management capacity. Nyungwe Nziza also helped establish market linkages for the groups' agricultural produce.

HOW HAS NYUNGWE NZIZA MADE A DIFFERENCE?

The highly targeted approach adopted by the Nyungwe Nziza grants program—focusing on community-based ecotourism and on agricultural activities that link to the local tourism industry—enabled the project to maintain a sharp focus on its overarching objectives. Often, grant programs are designed with broad, sometimes vague, overall objectives, and measuring the contribution of grant activities on the overall goals of the project can be challenging.

In order to assess the performance of Nyungwe Nziza grantees and the support that was provided to them, the project used a Total Quality Management approach. Rather than gauging the quality of project support simply in terms of the improved performance of local beneficiaries, the Total Quality Management approach is more holistic: organizational capacity is measured by assessing important elements such as leadership, closeness to customers and suppliers, benchmarking, and employee empowerment. Total Quality Management was used to understand the key elements that reduce the quality of local products and services and hinder performance of the grantees. The project measured performance across three categories: improved profitability, improved competitiveness, and improved productivity. The assessment used ordinal logistic regression statistical analysis to determine the effect of 12 variables of Total Quality Management on each of the three models of improved performance.

While individual grantee performance to date has been modest, all but one of the community groups are generating revenues that are being used to further their enterprises and improve the livelihoods of community members. In most cases, the groups have established strong systems of governance and business management. Most encouraging is that several groups have implemented innovative initiatives to use some of their earnings to capitalize programs that will diversify the income stream and scale up the benefits. For example, the Cyamudongo Cooperative is using a portion of its income to purchase piglets that are donated to poor households in the community. When the pigs have offspring, the owner is obliged to donate one piglet to another household and one to the cooperative.

LESSONS LEARNED

Nyungwe Nziza's grant program was designed to provide targeted support to high-potential activities that were conceived by committed and entrepreneurial community groups. The project's highly selective approach to awarding and managing grants, along with the provision of tailored, needs-based support, helped launch several initiatives that not only have a high probability of being sustained but are also models for other communities.

The preliminary findings of the quality assessment show that to improve the performance of community enterprises, training must be provided at all levels of product design, development, and promotion. However, training alone is not enough to improve quality and performance. Improving the competitiveness of the cooperatives requires that training is combined with benchmarking. The cooperatives must gauge the value of their products against those of their peers if they are to remain competitive and relevant in a very dynamic tourism sector.

The assessment also indicated that for cooperatives to be profitable, training must address three topics: quality is of paramount importance and should not be compromised; all members of the cooperative must be dedicated to the goals of the organization; and progress toward meeting goals must be monitored rigorously, with individual and collective performance managed accordingly.



Members of the Banda community performing a traditional warrior dance.



Members of the Cyamudongo Cooperative performing a traditional dance.

GENDER MAINSTREAMING

The Nyungwe Nziza project implemented procedures for regular monitoring to assess the integration of women into project activities and to gauge the extent to which women benefited from their participation in the activities. Of 318 direct beneficiaries of Nyungwe Nziza grants, 196 were women (62 percent). In addition, as noted above, 40 percent of all trainees were women.

The project delivered training on gender mainstreaming to several grantees and, in many cases, there has been an increase in female participation in group management. Following the training, five community groups committed to increasing the statutory number of women occupying management positions in the groups. In the case of the Cyamudongo group, for example, recent elections placed more female members in top management positions. These positive developments augur well for continued participation of women in development activities that generate genuine economic benefit their families and improve the status of women in the community.



Members of the Koperative Twiyubak'e Kitabi (KOTWIKI) receiving farming equipment provided under a grant from Nyungwe Nziza. Most of the members of the women's group are former sex workers who are now generating income from the sale of vegetables to local hotels and restaurants.

ENVIRONMENTAL COMPLIANCE AND OVERSIGHT

At the outset of the Nyungwe Nziza project, an Initial Environmental Examination (IEE) was approved for all Nyungwe Nziza's proposed activities. USAID determined that a Negative Determination with conditions should apply to several project activities:

1. Eco-tourism development activities, including consolidation of trails and development of tourism infrastructures in Nyungwe National Park.
2. Promotion of private partnerships and investment in Nyungwe National Park.
3. Small irrigation, soil conservation and watershed management activities.
4. Water and sanitation activities.
5. Promotion of alternative livelihood activities for local populations.

Nyungwe Nziza developed an Environmental Mitigation and Monitoring Plan (EMMP) that described in detail the mitigation measures required to address these specific risks. The EMMP also outlined environmental review and reporting requirements. The EMMP was approved by USAID in 2010. The mitigation measures and reporting requirements for several construction-related activities included the following:

1. Potential construction impacts would be mitigated by applying guidance for environmentally sound design and management (ESDM), including that found in USAID's Environmental Guidelines for Small Scale Activities in Africa (<http://www.encapafrica.org/egssaa.htm#II>) with specific attention to Chapter 3:Construction, Chapter 11: Water and Sanitation and Chapter 15: Solid Waste.
2. A plan was put in place for environmentally sound disposal of construction waste as well as excess materials remaining at construction sites. Use of local construction materials would be evaluated (sourcing local materials may be require less energy and be less resource intensive than imported materials as well as provide local employment benefits); any quarrying, borrow-pit work or sand-mining having indirect impacts would require mitigation.
3. Where possible, sand and gravel would be sourced from GOR licensed providers working at approved sites. When this was not possible, a "Quarry and Borrow Pit Management Plan" covering siting, extraction and restoration/alternative usage would be required for each building and excavation site in consultation with local stakeholders. In general, sourcing from river beds and beaches would be discouraged. By applying careful extraction methods that did not involve the use of heavy equipment, relatively small quantities of sand and gravel could be removed from local riverbeds provided the fluvial system would not be altered. The project would ensure that sand and gravel excavation sites were not washed out by, or in contact with, the main current of the river, so as to reduce scouring and sediment transport into the river.

Environmental Review Forms (ERFs) were submitted to USAID for approval for small grants and infrastructure/construction related activities prior to implementation.

SUMMARY AND RECOMMENDATIONS

The Strengthening Sustainable Ecotourism in and around Nyungwe National Park project—also known as the Nyungwe Nziza project—delivered support to the National Park through investments in infrastructure and staff capacity building as well as through grants to local community groups and co-financing of private sector investment in tourism. Overall, the project achieved or exceeded most of its targets, but leveraging private investment proved to be extremely challenging and these targets were not met.

The following is a summary of the main achievements for each of the five Project Intermediate Results. Recommendations for future support to Nyungwe National Park, as well as to the communities and businesses around the park, are based on the lessons Nyungwe Nziza learned over the five-year implementation period.

PIR 1 – Nyungwe’s tourism products developed through increased private sector participation. The most visible contributions that the Nyungwe Nziza project made are the improvements to park infrastructure—notably the visitors’ centers and trails. The importance of these cannot be overestimated; they have significantly improved the experience of visitors. The project’s support to community groups involved in tourism enterprises was also significant, but it will take some time before the viability of these initiatives can be fully assessed. Nyungwe Nziza’s support for developing the concessions policy created new opportunities for RDB to catalyze private sector engagement in the management of tourism facilities. While progress has been slow, there is a clear commitment on the part of RDB to implement the policy. The challenge will be finding private enterprises that are willing to invest in the concessions.

Nyungwe has long relied on the support of donors to develop and maintain infrastructure. The investments of the Rwandan Government and RDB are small in comparison to those of international donors such as USAID (tourism) and the World Bank (roads). Even as Nyungwe’s tourism revenues increase, there is no guarantee that the government will increase its financial contributions for development, operations, and maintenance. Any future support for Nyungwe provided by USAID should require clear commitments from the Rwandan Government and RDB that adequate budget support will be provided to maintain roads and other infrastructure.

PIR 2 – Improved marketing and promotion of Nyungwe among targeted segments.

Nyungwe Nziza helped RDB design and produce an array of informational and promotional materials for distribution at trade fairs and to the general public. The project demonstrated that to have impact, marketing must be based on a well-conceived and purposefully executed strategy. The strategy must be built on rigorous data from the tourism industry and on the know-how of industry experts. The marketing materials must be of high quality and must be tailored to the needs of different markets. A “one-size-fits-all” approach will not produce the desired results.

Going forward, RDB must continue to invest in updating and upgrading marketing materials—print products as well as web-based information. The story of Nyungwe, its wildlife, and the communities around the park is compelling. It warrants production of a series of short videos that can be posted to different websites where they can be viewed by tour operators and potential visitors. The continued

participation of RDB at international trade shows will be essential, but the marketing materials provided to potential investors and tour operators must be of the highest standards.

PIR 3 – Improved integration between communities and the tourism value chain. Before the launch of the Nyungwe Nziza project in 2010, there were very few functioning community-based tourism initiatives around Nyungwe National Park. Now there are several functional operations. At this time, the revenues are still small for all of the groups, but each group has a clearly defined plan for how the income will be used. Some groups have used the funds to capitalize loan programs and others are helping finance their members' access to health insurance. Such initiatives are providing tangible benefits to members of the community—hence, there is an increased recognition that Nyungwe National Park is an asset that is improving people's livelihoods.

Only a small fraction of the more than 9,000 visitors to Nyungwe National Park are availing themselves of the services offered by community tourism enterprises. The potential for these businesses to grow is significant provided that the quality of the services and other products meets the expectations of the prospective clients. Any future support to community tourism groups should focus on establishing quality standards for guide and food services, handicrafts, and other products.

PIR 4 – Improved policy and enabling environment for ecotourism. The efforts of Nyungwe Nziza in partnership with the USNPS produced a Cabinet-approved concessions policy and led to the finalization of the tender documents for awarding major concessions in Nyungwe. Revision of the entrance fees for Nyungwe in mid-2013 likely contributed to the increased number of visitors in 2014 (a 32 percent increase in visitors between 2013 and 2014 compared with a decrease in the number of visitors between 2012 and 2013).

The support that Nyungwe Nziza provided to RDB resulted in some fundamental changes to the way Nyungwe National Park is being managed. Initial indications are that these changes are having a positive impact on the number of visitors. Going forward, RDB will need to build on this foundation and continue to invest in improvements to the park infrastructure as well as the marketing of its attractions. Most importantly, RDB will need to award two major concession of the next 12 months and oversee their implementation.

PIR 5 – Improved RDB and private sector capacity for ecotourism planning and management. The training that Nyungwe Nziza provided to community groups was very much hands-on and focused on practical skills that the trainees could apply immediately to improve their ecotourism and natural resource management efforts. The partnership between Nyungwe Nziza and the USNPS has blossomed into a strong working relationship between RDB and the USNPS that will be sustained beyond the life of the project.

Although several senior RDB staff members feel that the future viability of Nyungwe National Park is still dependent on donor funding, Nyungwe Nziza has successfully built RDB capacity and transferred the skills needed to manage the park and grow it into an internationally renowned destination. Nyungwe's future will rest on the Government of Rwanda's and RDB's commitment to providing adequate funding to maintain park infrastructure and sustain the marketing efforts that Nyungwe Nziza implemented.

The future of Nyungwe National Park and the exceptional wildlife and biodiversity that it harbors is more assured in 2014 than it was in 2009. The Nyungwe Nziza project strengthened the capacity of park management and staff, launched successful tourism promotion campaigns, helped local community groups engage in ecotourism activities, improved the enabling environment for private sector

participation in tourism, and established a precedent for collaborative planning that includes the public and private sectors as well as community groups. Notwithstanding these successes, there is still an urgent need to leverage private sector investment in the tourism sector in and around Nyungwe. One of the fundamental impediments to investment must still be addressed: interest rates on bank loans are very high—about 19 percent—and many businesses find it extremely difficult to access capital. The banks are also reluctant to make loans given the potential for default at these high borrowing rates. If USAID/Rwanda continues to support sustainable tourism in and around Nyungwe National Park, there may be an opportunity to leverage investment through Development Credit Authority mechanisms to underwrite private sector borrowing.

ANNEX: PROJECT REPORTS

TECHNICAL REPORTS

- Nyungwe Canopy Walkway Guide Training Manual, November 2010
- Assessment of Ecotourism Potential in Nyungwe National Park, November 2010
- Tourism E-Marketing Assessment Strategy and Website Development, November 2010
- Tourism Planning and Investment in Nyungwe National Park, November 2010
- Community Attitudes and Behavior in Nyungwe National Park – a Protocol to Monitor Change, November 2010
- Tourism Market Profiles for Nyungwe National Park, December 2010
- Nyungwe National Park Concessions Action Plan, March 2011
- Bird Watching Assessment and Action Plan for Nyungwe National Park, June 2011
- Economic Baseline Survey among Nyungwe Nziza’s Targeted Communities around Nyungwe National Park, November 2011
- Assessment, and Framework for Monitoring Environmental Impact of Tourism, Applying a Limits of Acceptable Change Approach (LAC), January 2012
- Nyungwe National Park 5 Year Trail Management Plan and Maintenance Manual, February 2012
- Survey of Concession Sites for Sustainable Eco-lodge Planning and Design, March 2012
- Capacity and Training Needs Assessment Report among Nyungwe Nziza’s Targeted Communities, March 2012
- A Study on the Optimization of Activity Fees for Improved Visitor Satisfaction in Nyungwe National Park, May 2012
- Tourism Value Chain Analysis for Nyungwe National Park, September 2012
- Pilot Impact Investment Program for Nyungwe National Park, September 2012
- Nyungwe National Park ‘Escape to Nyungwe’ Marketing and Promotion Strategy, September 2012
- Assessment and Training Report on Improving Nyungwe National Park Tourism Staff Interpretive Skills and Visitor Experience, October 2012
- Canopy Walkway Inspection Maintenance and Training Report, December 2012
- A Study on the Impact of Gorilla Permit Price Increase on Tourism in Rwanda, with Particular Emphasis on Nyungwe National Park, November 2013
- Environmentally and Ecologically Friendly Designs for the Targeted Park Infrastructure for Nyungwe National Park (Gisakura, Gisovu and Kitabi), December 2013.
- Chimpanzee Habituation and Tourism Plan for Gisovu, December 2013
- Gender Mainstreaming Training Report for Nyungwe Nziza’s Targeted Cooperatives, January 2014
- Study on the Impact of Nyungwe Nziza and other Community based Ecotourism Initiatives on Threats Reduction in Nyungwe National Park, February 2014.

- Nyungwe National Park General Interpretive Plan for Improved Staff Interpretive Skills and Visitor Experience, April 2014
- Final Report on the Business Development Training Conducted among Nyungwe Nziza’s Agricultural Cooperatives, August 2014
- Final Report on Modern Agricultural Farming Methods and Soil Management Training Conducted among Nyungwe Nziza’s Agricultural Cooperatives, October 2014
- Nyungwe National Park Concession Management Guidelines, Budgets, Agreements, Financial and Market Analyses for Selected Sites (Gasare, Karamba and Gisovu), October 2014

CONTRACT DELIVERABLES

As defined in the USAID-DAI contract, deliverables refer to four outputs in four areas: a) Annual Work Plans; b) Quarterly, Annual and Intermittent Progress Reports; c) Trip Reports; and d) Performance and Impact Monitoring. Additional deliverables include a Marking Plan and Branding Strategy and Grants Format/Field Grant Guide. The cumulative contracted deliverables provided as of March 23, 2015 comprise the following:

Document	Submission Date to USAID
Work Plans and Documents	
First Annual Work Plan (March 24, 2010 – March 23, 2011)	May 22, 2010
Branding Strategy and Branding and Marking Plan	May 7, 2010
Environmental Monitoring and Mitigation Plan	July 10, 2010
Grants Manual/Field Grant Guide	September 14, 2010
Second Annual Work Plan (March 24, 2011 – March 23, 2012)	March 24, 2011
Third Annual Work Plan (March 24, 2012 – March 23, 2013)	March 28, 2012 (with approved extension)
Fourth Annual Work Plan (March 24, 2013 – March 23, 2014)	March 24, 2013
Fifth Annual Work Plan (March 24, 2014 – March 23, 2015)	March 24, 2014
Quarterly, Annual, and Intermittent Progress Reports	
First Quarterly Report: April – June 2010	July 14, 2010
CEPEX Report: April – June 2010	July 15, 2010
Second Quarterly Report: July – September 2010	October 13, 2010
CEPEX Report: July – September 2010	October 12, 2010
Third Quarterly Report: October – December 2010	January 17, 2011
Third CEPEX Report: October – December 2010	January 13, 2011
Fourth Quarterly Report: January – March 2011	April 13, 2011
Fourth CEPEX Report: January – March 2011	April 12, 2011
Fifth Quarterly Report: April – June 2011	July 12, 2011
Fifth CEPEX Report: April – June 2011	August 17, 2011
Sixth Quarterly Report: July – September 2011	October 14, 2011
Sixth CEPEX Report: July – September 2011	October 13, 2011
Seventh Quarterly Report: October – December 2011	January 13, 2012
Eighth Quarterly Report: January – March 2012	April 17, 2012 (with approved extension)
Ninth Quarterly Report: April – June 2012	July 12, 2012
Tenth Quarterly Report: July – September 2012	October 14, 2012
Eleventh Quarterly Report: October – December 2012	January 15, 2013
Twelfth Quarterly Report: March 2013	April 10, 2013

Document	Submission Date to USAID
Thirteenth Quarterly Report: June 2013	July 17, 2013 (with approved extension)
Fourteenth Quarterly Report: October 2013	October 14, 2013
Fifteenth Quarterly Report: January 2014	January 14, 2014
Sixteenth Quarterly Report: April 2014	April 14, 2014
Seventeenth Quarterly Report: July 2014	July 14, 2014
Eighteenth Quarterly Report: October 2014	October 14, 2014
Nineteenth Quarterly Report: January 2015	January 14, 2015
First Annual Report: March 24, 2010 – March 23, 2011	April 21, 2011
Second Annual Report: March 24, 2011 – March 23, 2012	April 20, 2012
Third Annual Report: March 24, 2012 – March 23, 2012	April 17, 2013
Fourth Annual Report: March 24, 2013 – March 23, 2014	April 22, 2014
Performance and Impact Monitoring	
First Year Monitoring & Evaluation Plan	May 7, 2010
Life of Project Performance Management Plan	May 27, 2010
Revised Performance Management Plan	Revised PMP (Version 2.0) was submitted to USAID on June 2, 2011, and approved on June 14, 2011.