AGRICULTURE & NATURAL RESOURCES PROJECT

THE GAMBIA MINISTRY OF NATURAL RESOURCES

PN ABT-148
91170

Gambia Parks Revenues and Budgetary Requirements Study

Volume 1 of 1

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USAID/Banjul Project No. 635-0236
Contract No. 635-0236-C-00-3244-00

ANR Document: TD/94/006
October 1994

IRG

International Resources Group Ltd., Prime Contractor
AMEX International Inc., Subcontractor

USAID

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LIST OF ACRONYMS

ANR	Agriculture and Natural Resources Project
ANRWG	Agriculture and Natural Resource Working Group
D	Dalasi, Gambian currency unit
DOF	Department of Forestry
DPWM	Department of Parks and Wildlife Management
DWCM	Department of Wildlife Conservation and Management
FIT	Foreign Independent Traveller
GBA	Greater Banjul Area
GEAP	Gambia Environmental Action Plan
GGFP	Gambia-German Forestry Project
GIT	Group Inclusive Travellers
GOTC	Government of The Gambia
IRG	International Resources Group
MIT	Ministry of Information and Tourism
MNR	Ministry of Natural Resources
MOA	Ministry of Agriculture
NEA	National Environment Agency
NGO	Non-governmental Organization
PBS	Program Budgeting System
TAC	Technical Advisory Committee
TDA	Tourism Development Area
TOR	Terms of Reference
USAID	United States Agency for International Development
VDC	Village Development Committee
VFR	Visiting Friends and Relatives
WDF	Wildlife Development Fund
WWF	World Wildlife Fund

THE STUDY TEAM

This study was conducted by two short-term International Resources Group (IRG) Consultants, and a team from the GOTG, as follows:

IRG CONSULTANTS:

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The study was carried out under the overall leadership of Dr. Amare Getahun, Chief of Party and ANR Senior Policy Advisor. The specific views expressed in this report are those of the study team and do not necessarily reflect the opinions of the GOTC, USAID, or IRG.

ACKNOWLEDGEMENTS

The short-term Consultant Team would like to express their gratitude to all the individuals who contributed their time and knowledge for the execution of this study. We are particularly grateful to Dr. Amare Getahun (ANR Chief of Party), Ms. Christine Elias (ANR Project Manager, USAID), Mr. Cherno O. Joof (Principal Assistant Secretary MNR), Ms. JoAnne Yeager (ANR Deputy Chief of Party and Grants Administrator), and Ms. Christine Brown, (Project Officer, IRG, Washington DC).

Several other individuals also made significant contributions to the Team's understanding of the issues critical to this study. Most of these individuals have been identified in Annex C of the final report. However, we extend our sincere thanks here.

The consultants owe a debt of gratitude to Ms. Anna Ola Anatsui for her patience with our endless draft changes and for working very long hours to ensure that the final draft was professionally produced to meet a tight schedule in the field.

SECTION ONE
INTRODUCTION

1.1 Background

The Parks Revenue and Budgetary Requirements Study was carried out in compliance with Conditionalities 7 and 9 of the agreement between the Government of The Gambia (GOTG) and USAID/Banjul. Conditionality 7 requires that the GOTG make a commitment to study the following: (i) present and projected forestry and park revenue flows; (ii) options for the retention of a portion of revenues by the resource generating sector (including line agencies, independent boards and communities); and (iii) personnel and operational expenditures needed by the GOTG to implement the natural resources component of the Gambia Environmental Action Plan (GEAP). For Conditionality 9, a set of recommendations has been provided based on the findings of this study. The Terms of Reference (TOR) for the study, which elaborate on these conditionalities, can be found in Annex A.

The following general observations, which will be elaborated in detail throughout the report, are offered as a summary of the current situation in The Gambian Parks Sector.

Limited Revenue Source. Abuko is the only park currently generating revenue (as Bijillo is a forest park). The entrance fee of D15 per person is the main source of revenue and has not changed since 1988. The total revenue generated is very meager and all proceeds go to the central government, with none going directly to the Department of Parks and Wildlife Management (DWCM).

Inadequate DWCM staff and training. The DWCM is seriously understaffed, and most staff are located at the headquarters. There is a particular lack of trained personnel in parks administration, wildlife conservation and management. Until recently, emphasis has been on conservation rather than management, which should include utilization of diverse park resources.

Lack of Support Equipment. The DWCM has insufficient transportation in the form of vehicles, motor bikes and bicycles to discharge its responsibilities. Furniture and office equipment is generally worn out and inadequate, and record keeping is done inefficiently by hand. Communication among the various parks and headquarters is also impaired. Staff motivation is adversely affected by this situation and by low salary levels. The recommendations provided by this study should be considered within the context of the need to resolve the above problems.

On the positive side, the opportunity exists to expand the parks system, and there is genuine interest by the Ministry of Natural Resources (MNR) to ensure that the DWCM achieves its objectives.

1.1.1 Key Issues

The following key issues constitute the problem examined in the study and elaborated in the various sections of this report:

Issue 1: Revenues generated by the Parks are paid into the GOTG Treasury. Neither the DWCM nor any local communities receive any of the revenues.

Issue 2: Revenues generated by the DWCM fall short of budgetary allocations from the Ministry of Finance. FY 92/93 revenues were D421,823 while the budgetary allocation from the Ministry of Finance in FY 93/94 was D803,270.

Issue 3: Admission fees into Protected Areas (D15/person) are currently very low and have not been increased since 1988. We conclude that increasing the fees four- or fivefold would have no impact on the number of foreign visitors to the Parks.

Issue 4: Currently, over 99.8% of revenues generated by the DWCM comes from Abuko Nature Reserve. Opening up the other protected areas to tourists, namely: Kiang West National Park, Tanji Bird Reserve, and eventually, The Gambia River Nature Reserve, is expected to generate substantially more revenues.

Issue 5: Over the last two years, tourism in The Gambia registered an average annual increase of 15%. The dynamics of The Gambian tourist market, and the marketing strategy need to be exploited as means to sustaining the current increase in the tourist trade, in order to support a sustainable parks product.

Issue 6: Parks revenues fall short of the cost of parks management. As other parks and reserves come on stream, the overall cost of parks management will rise due to staff, material and development needs. The increase in admission fees and the exploitation of new revenue sources would bring enough revenues to cover management costs and is expected to provide extra funds for research, development and priority needs of protected areas.

Issue 7: The principal issues in revenue sharing should be examined and opportunities for cost-sharing should be explored, along with technical assistance requirements for community and for co- managed parks.

1.1.2 Approach

The main aims of the study were:

- Provide a brief analysis of the current and potential tourist market, in order to better understand park revenue potential,
- Examine revenue flows and revenue potential of the parks.
- Analyze personnel and operational budgetary requirements for implementing the parks and wildlife portion of The Gambia Environmental Action Plan (GEAP).
- Evaluate and examine distribution of current and potential parks sector revenue.

The consultants made use of extensive documentation listed in Annex B. They also contacted a wide range of individuals and organizations, listed in Annex C, during their field work in The Gambia from May 9th to 29th, 1994.

The following steps describe the approach for the study:

Step 1: Describe the current and potential tourist market

Revenue earning potential from the parks comes primarily from expenditures by tourists. The main elements in this step are: (i) a description of the likely evolution of the tourist market, including the number and type of tourists, the average length of stay, and the likelihood of tourists visiting one or more parks; and (ii) a comparison of the number of tourists and the number of park visitors, with specific consideration of what factors appear to influence tourists' decisions to visit or not to visit the national parks, as well as the "willingness to pay."

This information is aimed at: (i) providing adequate understanding of the tourism sector to support judgement as to the elasticity of demand for parks attendance; (ii) assessing the potential for increases in park entrance fees and the growth/evolution of parks revenue from all tourism related sources.

Step 2: Examine revenue flows and revenue potential

Drawing on the information generated in step 1, the main components of step 2 are consideration and recommendation of alternatives for: (i) covering recurrent costs of the parks from revenue generated; (ii) increasing the number of visitors to the national parks, with particular attention to how the number of visitors might be affected by the addition of Kiang West as a potential tourist destination; (iii) increasing revenues per visitor, including but not limited to higher park entrance fees; (iv) increasing the "visibility" of the parks in the tourist community, both overseas and once tourists are in-country; and (v) improving the attractiveness of the parks as a tourist destination through improved management, infrastructure, information and protection.

Step 3: Determine personnel and operational budgetary requirements for implementing the parks & wildlife component of the GEAP

In this step, the study will provide "base case," "high" and "low" estimates for: (i) personnel requirements by category and discipline; and (ii) budgetary requirements on an annual basis for the next five years for personnel and operations to implement the parks program.

Step 4: Analyze distribution of current and potential park sector revenues

This step involves a detailed analysis of the PBS database to: (i) establish current revenue levels, distribution and uses; (ii) project total revenue levels under alternative scenarios; (iii) analyze the principal issues in the distribution of total revenues; (iv) provide specific and detailed analysis comparing Department of Wildlife Conservation and Management personnel and operational budgetary requirements to implement the GEAP with potential revenue flows to the DWCM.

Step 5: Determine cost-sharing and technical assistance requirements for community and/or co-managed parks

The final step involves examination of cost sharing mechanisms in community or co-managed parks and the role of community resource grant agreements to be developed through the ANR grants component.

1.2 Contents of the Report

The report consists of six sections: Section 1 presents the background, statement of the problem, and approach. Current Parks resources and revenue generation are examined in Section 2, while Section 3 covers the current and potential tourism market to determine the demand potential for the parks. In Section 4, revenue flows and potential are analyzed, and Section 5 presents budgetary requirements and revenue distribution. Finally, the summary, conclusions and recommendations and the action plan are presented in Section 6.

SECTION TWO
CURRENT PARK RESOURCES AND REVENUE GENERATION

2.1 Introduction to the Parks System

The GOTG's Department of Wildlife Conservation and Management (DWCM) is responsible for wildlife policy formulation, administration and management of wildlife and parks in The Gambia. The Banjul Declaration and the Wildlife Conservation Act of 1977 are the base-line documents for its operations. Its mandate includes protection, management, development and sustainable use of wildlife resources throughout the country. Particular interest has been given to the parks and nature reserves. These include three National Parks (Kiang West National Park, Niumi National Park and the Gambia River National Park) and three Nature Reserves (Abuko Nature Reserve, Tanji Bird Nature Reserve and Bao Bolong Wetland Nature Reserve).

Wildlife, national parks, cultural diversity and sunny beach-side opportunities have been the major attractions of tourists to Africa, and The Gambia offers an ideal alternative in the West Africa sub-region. However, its Parks and Nature Reserves need to be adequately developed and managed. The Gambia's rapidly growing population and high population density place growing pressure on protected areas and wildlife habitat as well as outside protected areas. To ensure long-term conservation for protected areas, their boundaries should be surveyed and clearly marked with the collaboration of adjoining local communities, and their resources evaluated and developed for national interests.

2.2 The Parks Resource Base

Table 2.1 below provides some basic descriptive information on the parks as well as recommended management activities. The specific objectives of the GOTG Wildlife Conservation Policy are the development of the full potential of parks and wildlife resources, to increase the revenue earning capacity of this sector through management, development and improvement of infrastructure, as well as to ensure that local communities benefit from wildlife conservation initiatives. Wild animals, rich bird life and their habitat constitute the resource base of the protected areas. Current utilization of park resources is limited to game viewing and photography. Cultural and socio-economic activities around protected areas broaden the resource base of the areas and constitute substantial potential sources of income to local communities.

Estimation of the revenue generating potential of Gambian parks calls for a better understanding of the resources that are currently present in the parks. To this end, a number of focused studies should be undertaken. Many of the following studies could be done with the expertise already present in the DWCM, although a number would require specialized help from outside The Gambia. The studies should include:

- Inventory of mammals
- Inventory of birds
- Inventory/identification of important plant species
- Inventory of invertebrates
- Preparation of vegetation maps

- Preparation of soil maps
- Preparation of geological and topographical maps
- Collection of climatic and hydrological data, including those related to the River Gambia and its fish resources

Depending on the management objectives for the different Parks and Nature Reserves, future studies should include:

- Wildlife population studies
- Habitat studies and management options, including key species habitat management and fire ecology
- Production of management plans which take into account the needs of local communities

These studies should aim at effective planning, development and management of the resources of the parks and protected areas. Additionally, such studies should facilitate the broad educational goals of the DWCM and the publication of informational material to potential users. A summary of The Gambia's major nature reserves and national parks is shown in Table 2.1 along with recommendations for improving the management of those parks and reserves.

2.3 Revenue Sources

Current revenue levels could be significantly increased by developing infrastructure and opening up other protected areas to tourism. Eco-tourism has the potential to become one of the largest sources of foreign exchange earnings for The Gambia (see section three of this report). The market survey responses (January-February 1994) and information on DWCM revenue collection seem to indicate that Abuko is presently the only source of revenues. Revenues collected at Bijillo Forest Park are not paid into the GOTG treasury but to the GGFP account. The amount collected at this park in 1993 was D61,575.

2.3.1 Entrance Fees

The following admission fees have been in effect since 1988 for Abuko:

High Season 1st Oct-31 May:	Adults	D15 per visit
	Children	D5 per visit
Low Season 1st June-30 Sept:	Adults	D10 per visit
	Children	D2 per visit

By comparison, Bijillo Forest Park (controlled by the DOF/GGFP) has the following rates:

D15/one-day visit
D30/valid for one week
D60/valid for one month
D500/valid for one year

Table 2.1: A Summary of National Parks and Nature Reserves with Recommended Management Improvements

Name	Date Created	Area (ha)	Resources	Recommended Management Activities
Abuko NR	1968	105	Monkeys, birds, crocodiles, bush-buck, caged lion, and hyena	• Renovate and upgrade visitor and education centers • Construct/renovate toilets • Revamp observation points • Improve trails and ponds • Improve documentation and interpretative program • Train and equip guides • Improve communication and security
Tanji Bird NR	1993	400	Resident and migrant avifauna, shore-line resources	• Complete construction of Visitor Center and trails • Need information brochures • Need trained guides
Kiang West NR	1987	11,000	Rich avifauna, 300 species, warthogs, monkeys, bush-buck, leopard	• Need trained staff, equipment • Need tracks • Need guides (trained) • Need informative documents • Need base-line resource information (plants and animal species)
Niumi NP	1986	4,900	Rich variety of fish, birds, mammals, plants	• Need infrastructure • Need staff • Need base-line data • Need studies on effects of human communities within the park • Develop management strategy
Bao Bolong Wetland NR	In process	20,000	Major wetland ecosystem avifauna, fishing, farming	• Need base-line studies • Need land-use plan • Need studies on activities & needs of periphery communities
Gambia River NR (Baboon Island)	1978	570	Rehabilitated chimpanzees, other primates, birdlife, bush-buck, etc.	• H/Q constructed • Need trails on upland areas • Need well designed boats for visits to islands • Need base-line information • Need to develop tourism facilities and open part of the park to tourism

NR = Nature Reserve
NP = National Park
H/Q = Headquarters

For Abuko, it is noteworthy that Gambian citizens, both residents and non-residents have all paid the same fee since 1988, even though the purchasing power of these groups is

not the same. Revenue from Abuko Nature Reserve amounted to D421,263 for FY92/93. This amount could be more than tripled by taking into consideration the rate structures elsewhere in Africa for similar resources and facilities.

There are a number of sources for revenue generation that are currently under utilized or non-existent.

2.3.2 Kiosks/Stalls

Kiosk sales grossed D83,268 from 7/93 to 4/94 and stalls brought in D4,400 in rents.

The stalls at Abuko are makeshift structures, but plans are underway to construct a few permanent kiosks and stalls, which should improve revenue levels.

2.3.3 Boat Rentals

At present there are no boat rentals, but they are a potential source of future revenue, particularly at Kiang West National Park (Tendaba and Kemoto), Bao Bolong Nature Reserve and eventually at the River Gambia National Park. The consultants believe that this is an excellent opportunity for local community initiatives. However, it will be possible only after building community capacity to successfully participate in co-managed projects.

2.3.4 Sale of Tourist Merchandise

Only a few documents are sold at the entrance of Abuko, bringing in D83,258/year. More sales could be made if the quality of the documents were improved. In most cases the sale of informational materials in the National Parks is done at a break-even price. Additional revenue could be generated by selling precious stones, shells, curios, T-shirts and other types of souvenirs. As noted earlier, there are no ornithological inventories of species available for any of the parks. These could easily be established by DWCM, reproduced and made available at a price. Further, these lists once completed by ornithologists could be used to develop the specific inventory mentioned in Section 2.2.

2.3.5 Additional Sources of Revenue

An additional source of revenue for the DWCM could be obtained by issuing hunting permits. In the hunting season from 15 December 1992 through 31 August 1993, only 11 bird-hunting licenses were issued, with a total revenue of D440. So far 19 licenses have been issued in the entire country for the 1993-94 season. Even though these permits are very inexpensive, the actual number of people hunting may greatly exceed the number of permits issued. Unfortunately, the DWCM does not have the resources to adequately monitor hunting activities.

2.3.6 Total Revenue From All Sources

Total revenue from the Parks System is very low for a number of reasons: (i) no mechanism is in place to collect park entrance fees, except at Abuko; (ii) the admission fees are too low; (iii) the DWCM does not have the qualified personnel or resources needed to develop new areas and attract more visitors, thereby increasing the department's revenue-earning capacity. Revenues generated in 1992/1993 were as follows:

Entrance fees to Abuko	D366,390.00
Hunting Licenses	D440.00
Kiosks sale, rental, etc.	D54,993.00
Total	D421,823.00

2.4 Distribution of Revenues

At present all revenues collected by the DWCM are paid into the GOTG treasury. The DWCM's recurrent costs and investment budget are funded by the Ministry of Finance. There is no apparent link between revenues collected and budgetary allocation. The steady increase in salaries in 1991-92 and 192-93 was not matched by a corresponding increase in revenues. In fact, for FY1993-94 expected revenues of D500,000 fall short of recurrent and development allocation by D482;270.

Allocations in excess of revenues can be seen as an expression of the importance the GOTG attaches to wildlife, parks and protected areas. This investment is required at this early stage for the development of infrastructure and promotional materials including: improved trails and observation points, toilets, visitor centers, information and education centers, communications equipment and upgraded information packages.

The wildlife stock has survived not due to law enforcement, but largely because of the traditional value attached to it by local people. Changes in attitude are caused largely by economic forces and the marginalization of local communities. But these communities are, and will remain for some time, the true custodians of the natural resources on which they depend, in some instances, for their day-to-day survival. Therefore, using these resources for anything other than consumption should bring some benefit to them. Indeed, the parks system should provide opportunities to improve the lot of the local communities.

Local communities should be involved in the management of protected areas, and a portion of the revenues generated by the sector should be earmarked for priority activities and needs of adjoining local communities. In most African countries with wildlife resources, all revenues are paid into the government treasury. For some countries a small percentage, generally below 10%, is kept in a special treasury account to fund the relevant ministry. Nothing is given to the local community and there is no tailor-made formula for the distribution of revenues.

SECTION THREE
CURRENT AND POTENTIAL TOURIST MARKET

3.1 Introduction

An understanding of revenue generation potential from The Gambia's national parks and reserves demands a better understanding of the current and potential tourist market. Initiation of tourism as an industry in The Gambia is traced to the mid-1960s when Vingressor purchased a five-year monopoly from Harding (a small Scandinavian tour operator), to operate charter flights in and out of The Gambia. A group of Swedish residents in The Gambia at that time operated a boat-restaurant and the Wadner Beach Hotel, which accommodated the first group of tourists coming mostly from Sweden. Three major factors have enhanced the role of tourism in the economic development of The Gambia. First, in the 1970s with UNDP and USAID assistance, the GOTG established a tourism development plan aimed at exploiting a large, undeveloped stretch of coast south of Cape St. Mary in the Kotu Region. This resulted in the development of a number of large accommodation units including the Atlantic, Kombo Beach, Senegambia and Sun Wing Hotels. Second, the GOTG has followed a liberal aviation policy which has encouraged both scheduled and charter traffic, expanding the market base beyond the Scandinavian market. Third, political stability in The Gambia has encouraged investment in tourism infrastructure as well as the flow of tourists into the country.

The objective of this section is to establish the potential for increases in parks entrance fees and other sources of revenue from tourist-related activities.

3.2 Tourist Arrivals

The number of foreign visitors to The Gambia increased from only 300 in 1965-66 to 21,000 in 1975-76. Table 3.1 presents a summary of tourist arrivals covering the period 1982-83 to 1990-91 according to type and mode of travel.

The total number of international visitors in 1990-91 was 101,419. The main mode of travel was air, of which charter flights accounted for 62% of air arrivals or 57% of total arrivals for the year.

Tourism in The Gambia is highly seasonal, the peak period being from November to April with the rest of the year considered to be shoulder or low seasons. It has been possible to extend the main tourist season from April to June; however, opportunities to make The Gambia a year-round destination are now limited by several factors.

Table 3.1: Tourist Arrivals from 1982-83 to 1990-91

Year	Air Charter	Non-Charter	Total	Sea Total	Land Total	Total All Visitors
1982/83	26,745	14,355	41,100	1,019	7,522	49,641
1983/84	39,491	15,442	54,933	1,039	8,136	64,108
1984/85	45,861	18,504	64,365	1,234	8,254	73,853
1985/86	47,926	19,937	67,863	1,499	8,906	78,268
1986/87	45,759	20,792	66,551	1,727	9,355	77,633
1987/88	47,734	38,340	86,074	1,310	9,129	96,513
1988/89	54,149	35,749	89,698	2,460	9,246	101,604
1989/90	47,012	30,063	77,075	479	8,306	85,860
1990/91	58,026	35,919	93,945	1,718	5,756	101,419

Source: Central Statistics Department, Banjul

Most Europeans seek holidays in The Gambian sun during the winter months, and the high season illustrated in Table 3.2 is a reflection of this climatic condition. The low tourist activity in The Gambia is related to weather conditions in the country. Between May and September heavy rains can curtail tourism, even though those summer months coincide with Europe's traditional vacation period. Understandably, The Gambian tourism industry is sensitive to the term "rainy season," since when Europeans and Americans hear the word "rain" connected with a tropical country, they think of monsoons and endless rain (see Proceedings of the First Gambia Tourism Review Conference, page 16). While the rainy season may have less disruptive impact on tourists' beach and sun activities in the coastal areas of The Gambia, it may curtail up-country activities based on the National Parks. Some specific issues relating to demand for the products in the National Parks from May to September include:

- Access to parks by unpaved roads
- Flooded tracks within the parks
- Rapid vegetation growth and poor wildlife sighting
- Wet and flooding conditions at temporary camps within the parks
- High incidence of insect pests such as mosquitoes

The weak low season demand is also due to the fact that most tourists visiting The Gambia arrive by charter flights (Table 3.2) that depend in turn on the availability of air carriers. During the May to October period, rates by air carriers are much higher as the demand increases for direct flights to several warm weather destinations such as the Mediterranean. The factors of competition, substitution and intervening opportunities in international tourism depress demand for Gambian tourism during this period.

Table 3.2: Monthly Air Chartered Tourist Arrivals From 1991-1993

Month	1991		1992		1993	
	NO.	%	No.	%	No.	%
January	8,772	15.2	10,157	15.1	8,206	10.7
February	8,046	13.9	8,776	13.1	6,731	8.8
March	8,114	14.0	10,444	15.6	8,642	11.3
April	4,776	8.3	6,608	9.8	5,950	7.8
May	1,122	1.9	1,821	2.7	3,294	4.3
June	521	0.9	1,515	2.3	3,286	4.3
July	1,328	2.3	1,426	2.1	4,217	5.5
August	1,561	2.7	2,110	3.1	3,725	4.9
September	1,426	2.5	1,579	2.3	4,239	5.5
October	2,911	5.0	3,684	5.5	5,795	7.6
November	8,126	14.1	9,736	14.5	9,623	12.6
December	11,096	19.2	9,278	13.8	12,786	16.7
TOTAL	**57,801**	**100.0**	**67,152**	**100.0**	**76,494**	**100.0**

Source: Ministry of Information and Tourism

Table 3.2A: Summary of Summer (Low Season) Chartered Arrivals for 1991-1993

Month	1991	1992	% Increase	1993	% Increase
May	1,221	1,821	50.4	3,294	80.9
June	521	1,515	190.8	3,286	116.9
July	1,328	1,426	7.4	4,217	195.6
August	1,561	2,110	35.2	3,725	76.5
September	1,426	1,597	12.0	4,239	165.4
October	2,911	3,648	25.3	5,725	56.9
TOTAL	**8,958**	**12,117**	**35.3**	**24,486**	**102.1**
Percentage of year total	**15.5%**	**18.0%**		**32.0%**	

Source: Summarized From Table 3.2

The main tourist markets for The Gambia are the half a dozen countries shown in Table 3.3. Air charter arrival in 1992/93 were nearly 63,400 of which the British market constituted 56.7 per cent. In spite of its importance, the British market has been described as "essentially beach sedentary and quite unadventurous in terms of expectations and activity. British visitors and many of the Scandinavian visitors to The Gambia are seeking a combination of adequate beach resort accommodation with guaranteed winter sun" (see Brown and Root Environmental, March 1994). While the consultants believe that a significant proportion of the British market can be enticed to participate in up-country tourism, it is an established fact, particularly in Eastern, and Southern African tourist destinations that the French, German, Belgium and Italian (in addition to the Swiss and Austrian) markets are more adventurous. They are willing to spend more on the basic holiday package, and prefer to combine adventure tourism with beach holiday.

Table 3.3: Air Chartered Tourists By Nationality, 1982/83-1992/93

Year	British	French	German	Danish	Norweg	Swedish	Others	Totals
82/83	10,121	2,402	1,099	2,376	465	6,059	4,223	26,745
83/84	15,061	4,054	2,148	2,644	946	5,669	8,969	39,491
84/85	23,742	4,330	2,106	2,636	701	5,911	6,435	45,861
85/86	28,332	3,756	1,689	2,521	976	5,800	4,852	47,926
86/87	24,515	5,320	1,592	2,590	1,952	6,698	3,092	45,759
87/88	26,229	5,773	1,661	2,824	1,506	6,642	3,099	47,734
88/89	30,628	6,926	2,254	2,938	1,219	6,949	3,235	54,149
89/90	26,901	4,229	4,322	2,336	868	6,198	2,157	47,021
90/91	31,370	3,082	5,583	2,179	794	7,855	7,163	58,026
91/92	32,247	3,311	8,061	2,499	1,900	7,909	9,844	65,771
92/93	36,298	2,244	7,138	3,406	834	5,818	8,202	63,940

Source: Central Statistics Department, Banjul

Presently, about 30% of tourists to The Gambia take day excursions from their hotels. It is estimated that only about 5% of all tourists venture up-river or into the interior. This situation reflects a number of conditions, including the absence of developed parks except for Abuko, the limited amount of adequate tourist infrastructure (particularly accommodations) up-country, and the lack of dependable access, especially by river from Banjul into the interior of The Gambia.

The Gambia has the potential to develop a viable diversified tourism product which should:

- Appeal to a broader market segment beyond the beach holiday visitors
- Extend the current length of stay for non-chartered tourists
- Increase total expenditure (or tourism revenues)
- Act as a catalyst for regional and rural development

A number of recent, current and planned activities should improve the flow of tourists into The Gambia (increased demand) as well as enhance the tourism product development (increase supply).

3.2.1 Tourism Promotion and Marketing

Under a three-year program, the EEC has provided 11 million Dalasis to market The Gambia as a tourist destination under the Lome IV country program. This tourism marketing program will involve hotels and lodges as well as the leading tour operators who are the

critical tourism marketing intermediaries between destination Gambia and points of tourists' origin on the European market. Table 3.4 lists the leading operators to The Gambia for each market. Ten of these operators account for 80% of holiday visits to the Gambia. Furthermore, four of the tour operators indicated in Table 3.4 also run their own airlines, which provides a high degree of vertical integration. The EEC's three year program and the integrated tour operators provide excellent frameworks for long term tourism promotion and marketing of The Gambia. The EEC program should facilitate expansion and retention of The Gambian tourism market with specific reference to the development of tourism.

3.2.2 Tourism Marketing Intermediaries

The tour operators (and to a lesser extent, major hotels) undertake the bulk of the marketing and promotion on the various source markets. Total private sector annual investment in promoting The Gambia is about US$1 million. It has been estimated by D. J. Associates that the largest tour operators feature up to 5 pages, on the average, on The Gambia in their tour brochures at a cost of about US$10,000 per page. A major operator to The Gambia, The Gambia Experience, publishes and distributes thousands of its 33-page brochures to travel agents at the cost of D45,000 per page (see Proceedings of the First Gambia Tourism Review Conference, 1991, page 25). A strong private sector institutional framework exists for the promotion and marketing of The Gambia's emerging diversified tourism product. Marketing and promotion of the wildlife product can readily be incorporated into the existing marketing strategies of the leading tour operators to The Gambia.

3.2.3 US Market Penetration

The United States is one of the top five sources for international tourism. in terms of market size and both disposable and discretionary income. Recent studies by the US Travel Data Center also indicate that each year the proportion of African Americans interested in visiting Africa, particularly the expanding professional and middle class, is increasing. Presently, The Gambia does not benefit from the huge US market due to a number of difficulties including lack of direct air access and lack of promotion in the US, by both public and private sectors. The key marketing and promotion intermediary in the US is the African Travel Association (ATA) which is made up of over 400 Travel Agents in the United States who primarily "sell" African destinations at the wholesale, retail and tour operator levels. The Gambian Ministry of Information and Tourism has plans to launch The Gambian product for the US market when the country hosts the 21st Annual Conference of the ATA in May 1996. The US market will be more interested in cultural, ethnic and historical tourism. Most will be experiencing Africa for the first time, visiting two or three countries, possibly The Gambia and Senegal. It is important that a marketable cultural and national parks product is ready for introduction to the US market in May 1996. Ghana, which hosted the ATA conference in May 1994, successfully launched its historical, cultural and eco-tourism product through a Host Country Day activities. The Gambia plans a similar program, but the Ministry of Information and Tourism will require donor assistance, which in the case of Ghana was provided by USAID as a component of its historical restoration and natural resource conservation activities in Ghana.

Table 3.4: Leading Tour Operators to the Gambia

Country	Operators	
United Kingdom	Gambia Experience Thomsons 1 Airtours 2 Owners Abroad 3 Cosmos 4 Sunworld Tropical Places Hayes & Jarvis Kuoni Paloma Riva	Redwing Wings Horizon Africa Tours Lancaster Sinbad Select Uniclam Aviatours Musair
Germany	TUI Neckerman Jet Reisen Hetzel	Imholz Kreutzer Aviareisen Cool Running Tours
Scandinavia	Vingresor Spies Tjaereborg	
Belgium	Transair Eco Reisen Jetair	
France	Monsol International	
Italy	Club Viaggi Pool 90	
Austria	Trident Travel	
Canaries	Columbus	
Switzerland	Hotelplan	

1. **Britannia Airways**
2. **Airtours Airline**
3. **Air 2000 Airline**
4. **Monarch Airline**

3.2.4 Air Access and Airport Improvement

The EEC Study (Study on Tourism in The Gambia) by D.J. Jeffries Associates, provided a proposal for the development of an aviation strategy for Yundum International Airport. In order to bring the facility to international standards, particularly in the areas of safety, security and speedy processing of passengers through entry and exit formalities, The African Development Bank (ADB) is funding a study to improve the international airport. In addition to this, the question of landing rights for selected carriers including Air Afrique (which operates direct flight from New York to Dakar) is under consideration. Swiss Air recently started operations to The Gambia combining Banjul with Dakar.

Gambia Airways, which took over the route relinquished by British Airways, has announced plans to extend one of its twice a week services (from London Gatwick) to New York.

3.2.5 Regional Cooperation and Multiple Destination Marketing

The concept of continentality as applied to Africa's geographical, historical and cultural diversity has resulted in the desire of large segments of the international leisure tourist to visit a number of African countries in the sub-region on a single trip. At the moment The Gambia is a single tourist product destination, and stands to benefit from increased international tourism activity in the West African region. The number of international tourists to West Africa increased from 704,000 to 1,300,000 during the period 1980-1990. This is a viable potential to support dual destination holidays pairing The Gambia with Mali, Guinea, Guinea-Bissau, Senegal and Cape Verde Islands. We are informed that the Ministry of Information and Tourism has recently signed co-operative agreements with Senegal and Guinea-Bissau, and has plans for similar agreements with Mali and Mauritania.

Table 3.5: Capacity of Tourist Safari Camps and Lodges

Facility	Year Opened	Approximate Capacity
Lamin Lodge	1972	15 persons, sleeping on river boat
Tendaba Camp	1972	50 rooms, 140 people
Sonfanyama	1988	11 double rooms, 22 people
Jangjanbureh	1988	48 beds
Kemoto Lodge	1992	55 rooms, 165 beds
Bondali Camp	1992	9 rondavels, 18 people
TOTAL		**Approximately 400 Beds**

3.2.6 Accommodation Facilities

Tourist accommodation in The Gambia is estimated at about 6000 beds divided among 20 hotels in 1993. The bulk of tourism beds are located on or near beaches in the following four areas: Banjul, Cape Point, Bakau/Fajara and the Kotu cluster which includes the Kairaba and Senegambia hotels. Outside of the Greater Banjul Area there are a few lodges along the River Gambia (Table 3.5). These constitute only 6.6 per cent of the total tourism beds (6,000) in The Gambia.

Kemoto and Bondali are recent developments with plans to expand capacity of beds, and add conference and meeting facilities. For example, Kemoto Lodge is adding more guest accommodation, has ordered two 20-passenger speed boats for the 1994 tourist season, and has plans to directly market the facility abroad. Similarly, Tendaba Camp recently expanded its guest facility to accommodate 40 more people, and is increasing its conference and meeting facility to handle groups up to 130 people.

A number of important features and linkages of these safari camps and lodges within or near the parks, particularly in Kiang West, should be pointed out:

- There are several good ground handling operators including Gamtours, West African Tours, Holiday Sunshine Tours, Black and White Tours and Gambia

Tours, which offer up-country and cross-border excursions. The operators we contacted are eager to increase their passenger capacity to the parks. Some, such as Gamtours, Black and White Tours already have agreements with the bigger lodges in Table 3.5.

- Access to the parks and lodges is expected to increase in the 1994 tourist season. A catamaran operation started in early 1994, and a number of the lodges are purchasing their own mid-size speed boats to transport passengers to and from Banjul. These can have negative environmental impact and should be monitored and regulated.

- Direct marketing overseas by some of these lodges will increase. Kemoto has such plans, while Tendaba which has a long established marketing arrangements with Scandinavian operators, Vingressor and Spies, has entered agreement with French-based Delmasur to bring in half of 179 tourist to The Gambia each week.

- Most of the lodges have safari equipment such as vehicles, canoes, and camping equipment, and in fact, do organize daily safari excursions and some overnight bush trips.

3.3 Tourist Receipts

Total tourism foreign exchange earnings in The Gambia has more than doubled from $23.6 million in 1986-1987 to $60.1 million in 1993 (Table 3.6). The figures in Table 3.6 are actual "out of pocket" expenditures by tourists and exclude the cost of the holiday package, which include at least an accommodation and sometimes, meal plan elements. Examination of the economic indicators of tourism activity shows the following:

- Air chartered tourists, who accounted for about 57.1%, generated a total of $31.0 million in 1993 or 51.6% of the $60.1 million total earnings.

- Non-chartered visitors are equally important contributors to The Gambian economy, accounting for $29.14 million in 1993 or 48.4% of total earnings. This category of visitors includes those visiting friends and relatives (VFR), on business (including consultancies) and attending meetings and conferences.

- The average daily expenditure has increased from about US$23.0 in 1986-1987 to US$33.7 in 1993, and is the same amount for other visitors.

Table 3.6: Economic Indicators of Tourism Activity for 1986/87 and 1991-1993

	1986-1987	1991	1992	1993
Air Chartered Tourists (Number)	46.759	57.801	67.152	76.494
1. Gross earnings (million D)	106.68	201.98	239.30	287.94
2. Gross earnings (US$ million)	14.6	25.6	26.3	31.0
3. Average daily expenditure (D)	168.00	273.00	302.00	313.68
4. Average daily expenditure (US$)	23.0	34.6	33.2	33.7
Other Visitors (Number)	31.874	43.393	50.364	57.370
1. Gross earnings (million D)	65.98	184.80	224.27	271.01
2. Gross earnings (US$ million)	9.03	23.32	24.65	29.14
3. Average daily expenditure D)	148.75	276.54	305.00	315.00
4. Average daily expenditure (US$)	20.4	35.0	33.5	33.89
All Visitors (Number)	78.633	101.194	117.516	133.864
1. Total earnings (million D)	172.66	386.78	463.57	558.95
2. Total earnings (US$ million)	23.6	49.0	50.9	60.1
* Exchange Rate - Dalasis/US$	7.3	7.9	9.1	9.3

Source: Calculated from Central Statistics and Ministry of Information and Tourism (MIT)

The Central Statistics Department provides a breakdown by expenditure category for the quarter April to June 1993. We have summarized this with a corresponding actual dollar amount in Table 3.7, using the $33 average daily expenditure for both chartered and non-chartered visitors. We have further calculated this on the basis of 7, 10 and 14-days stays.

Table 3.7: Breakdown of Average Tourist Expenditure for 7, 10 and 14-Day Stays

Expenditure Category	Percentage	Daily US$	7 Days US$	10 Days US$	14 Days US$
1. Food and Drinks	59	19.47	136.29	194.70	272.58
2. Taxis	03	0.99	6.93	9.9	13.86
3. Organized Tours	18	5.94	41.58	59.40	83.16
4. Souvenirs	16	5.28	36.96	52.80	73.92
5. Others	14	1.32	9.24	13.20	18.46
	100	33.00	231.00	330.00	462.00

3.4 Length of Stay

The average length of stay for air chartered and other visitors is summarized for 1986-1987 and 1991 to 1993 in Table 3.8. The length of stay for both categories of visitors is high considering the limited developed tourism attractions beyond the Greater Banjul Area (GBA) and its beach hotel enclaves. This situation provides a strong potential demand for up-river and cross country tourism, especially the Kiang West National Park and the Bao Bolong Wetlands.

Currently most tourists spend almost all of their 12 to 15 days in The Gambia in and around the GBA. As pointed out earlier in this section, only an estimated 5% of tourists engage in cross-country and up-river excursions. Despite the very limited developed opportunities for tourism outside the GBA, all the major local tour operators and companies providing ground handling and associated services have developed and offer a range of interesting excursion programs. These excursions are offered everyday of the week making it easy for tourists to participate in one or several tours during their stay in The Gambia.

Table 3.8: Average Length of Stay for 1986/87 and 1991-1993

Category	1986/87	1991	1992	1994
1. Air chartered tourists	13.8	12.8	11.8	12.0
2. Other visitors	15.3	15.4	14.6	15.0

Source: Ministry of Information and Tourism.

3.5 Purpose of Visit

Currently, tourism statistics of The Gambia do not include the purpose of visit. Based on our field observations and discussions with tourism industry personnel, we arrive at the following conclusions:

- Analysis of the passenger disembarkation forms at the airport will provide the Ministry of Information and Tourism with the critical information on visitors' purpose of visit.

- Air-chartered visitors who constituted 57% of the arrivals in 1993 are predominantly leisure visitors on holidays. Their number was 76,494 in 1993 (Table 3.6).

- The other 43% (or 57,370) of total visitors in 1993 consists mostly of tourists arriving by scheduled airlines. These fall into the following categories: predominantly Foreign Independent Travellers (FIT); visiting Gambian or resident expatriate friends and relatives (VFR); on business, which includes consulting, meetings and conferences; and others which include religious visits, sports, education, etc.

- The important point with respect to non-chartered visitors is the fact that their average length of stay is a significant 15.0 days in 1993 (Table 3.8). They have the opportunity for up-river and cross country excursions and overnight trips. The key is to advertise The Gambia's tourism opportunities through:

  - Hotels
  - Tour operators, and in their holiday brochures distributed abroad
  - Pre- and post-conference tours
  - In-flight entertainment systems of in-bound airlines, particularly from Europe and North America

3.6 Domestic Tourism

We estimate domestic tourism in the Gambia for leisure purpose at about 25% based on visitation figures from Abuko. The majority are excursionists rather than tourists, involving no overnight stays and mostly from the Greater Banjul Area. Tendaba camp also provided a 25% figure from its registration record. We believe actual numbers can be increased through greater promotion with:

- Greater awareness through radio and newspaper advertisements
- Park entrance fee discrimination
- Adding field trips to training, conference or institutional retreats at lodges in and around the National Parks

3.7 Summary and Implications

The objective of this section was to examine the salient aspects of The Gambian tourism industry to support existing and potential demand for parks attendance. This, in turn, is to form the basis for decisions regarding the potential for increase in park entrance fees and the growth or evolution of parks revenues from all tourist related sources. The main points from the discussion in this section may be summarized as follows:

- The Gambia has recorded impressive increases in tourist arrivals and revenues in 1992 and 1993. Tourist arrivals and revenues were 133,864 and $60.1 million respectively in 1993.

- Tourism in The Gambia is dominated by the leisure chartered flight market from European countries. Some chartered packages are as low as 229 Pound sterling to 300 Pound sterling for two weeks for airfare, accommodation and breakfast.

- There is, however, another significant category of visitors arriving by regularly scheduled air service. These include those visiting friends and relatives, for leisure, business, consultancies, conferences and meetings. These other visitors numbered 57,370 or 43% in 1993 and generated US$29.1 million.

- Currently, an estimated 30% of tourists take excursions, mostly to wilderness areas, forest parks and villages in and around the Greater Banjul Area. Only about 5% of tourists engage in cross-country and/or up-river tourism. From our discussions with local tour operators, we believe this small figure is not due to lack of interest or costs, but rather the unavailability of wildlife-based tourism opportunities outside the beach tourism enclaves in Greater Banjul.

- All categories of visitors to The Gambia spend a surprisingly high 12-15 days in the country, on the average. This is a tremendous "captive audience" for the new tourism product to be developed based on the biodiversified resources of the national parks.

- Tourists to The Gambia presently spend an average of only US$33.00 a day. Organized tours constitute only 18% or US$5.94 a day. There is a highly inelastic demand for wildlife and ecotourism activities in Africa such as photo, hunting, general and walking safaris and rural village tours.

- Both local and European tour operators and their ancillary charter airlines provide an excellent framework to market and promote the tourism product of The Gambia abroad. Several of the major local tour operators already offer safari-type excursions and are ready to offer extended trips into the country's interior. While the chartered tourist can purchase a visit to a national park or parks as part of a package, other visitors should be able to purchase such trips from local tour operators, at hotels, and lodges.

- The three-year 11 million Dalasis EEC marketing program will be pivotal in launching the parks, wildlife and wilderness product on the European market.

- In the US market, the primary target will be the African-American market within a multiple destination context. This will combine The Gambia with other countries in the sub-region, some of which have recently signed multiple destination tourism agreements with The Gambia. With reference to the North American market, there is a vast secondary market of non-African Americans in the US and Canada, who are big tourism spenders, as experience from East and Southern Africa has shown.

- The Ministry of Information and Tourism plans to launch The Gambian tourist product on the United States market in May 1996 during the conference of the Africa Travel Association. Due to the successful role that the ATA has played in generating demand for African destinations, we suggest a closely coordinated interaction between the DWCM and the MIT for this event, and some funding support from donor organizations.

Implications

The Gambia has about 30 years of experience in mass international tourism. However, this has not evolved beyond the "sun and surf" and soft budget tourism based on the beach enclaves in the Greater Banjul Area. Even at current levels of tourist arrivals, based on our evaluation, we believe there is a tremendous potential for developing the national parks, particularly Kiang West and the Bao Bolong. The demand for wildlife-based tourism is highly inelastic for all market segments. We believe a four- to fivefold increase of the current park entrance fees is reasonable for international visitors.

It is worth noting that, there are unrealized demands for Gambian tourism in Europe. There are tourists interested in African adventure and ecotourism, but who do not see the Gambia as such a destination. These markets lie in Germany, France and Italy, where leading operators to The Gambia already have strong presence. We also suspect that quite a sizeable number of both Group Inclusive Travellers (GIT) and Foreign Independent Travellers (FIT) stay away form The Gambia due to its beach-dominated tourism.

The US, and to a lesser extent the Canadian market, also have significant demand potential for Gambian tourism based on a biodiversified cross-country tourism centered on the national parks. The business, other leisure, VFR and conference markets also hold significant potential.

Against this background, the next section examines revenue flows and potential for the parks system.

SECTION FOUR
POTENTIAL REVENUE FLOW

4.1 Introduction

Revenues from the Department of Wildlife Conservation and Management revenues have essentially come from admission fees at Abuko. Unfortunately, Abuko's potential has not been fully exploited. Kiang West National Park does not as yet officially receive visitors. While Niumi National Park and Tanji Bird Reserve are expected to generate revenues, the River Gambia National Park/Baboon Island is considered to be strictly for research and is not expected to generate tourist revenue, although it may generate research revenue.

It is the GOTG's desire to maximize revenue returns from protected areas. As a guiding principle, it is assumed that the GOTG would like to have the revenues generated from the sector equal the budget allocated to the sector. In this chapter, alternative sources will be explored and their potential evaluated.

4.2 Potential Revenue Generation

4.2.1 Recurrent Cost of Parks

In order to assess whether the budget allocated to select activities corresponds with the revenue generated from those activities, it is important to assess the recurrent costs of parks. To date, no estimates have been made of the cost of running different parks and protected areas. Their costs are part of the staff recurrent costs of the DWCM, which stand at D413,227 for FY 93/94. It is recommended that managers/wardens be assigned to individual protected areas, which will be managed and developed for tourism. Budgets will be allocated to individual areas and revenues will be generated to offset budgetary allocations. The basic recurrent costs for each of six national reserves and the headquarters at Abuko are presented in Annex D.

4.2.2 Increasing Park Visitation

Park visitation can be increased and is desirable. Specific development and management activities, target-oriented messages, attractive services, production and distribution or sale of comprehensive information packages, would satisfy tourist demands.

The first step towards increasing revenue flow is to increase visitation to protected areas. Different areas attract different kinds of visitors depending on their resource base, their proximity to urban centers and the various costs involved (i.e. transportation costs, admission fees, time factor etc.).

Abuko Nature Reserve and Tanji Bird Reserve, which are located within or next to the capital, are ideal visitation sites for the urban population and visitors to The Gambia who do not have more than one or two free days. Another important step is to get current visitors to spend more.

The DWCM market survey showed that one out of four visitors to Abuko Nature Reserve is Gambian. Because of financial and material constraints, more Gambians are likely to visit Abuko and Tanji than Kiang West National Park, which is about 150 km from Banjul. Nevertheless, visitation of protected areas by Gambians can be an important source of revenue. If 5-10% (8,340-16,700) of the population of Banjul, Serekunda and Brikama visited the above protected areas each year, this could represent earnings in excess of D125,250-D250,550/year.

Participants in the DWCM market survey frequently suggested introduction of more wildlife species into Abuko. While such a move would definitely increase visitation by both Gambians and foreign visitors, care should be taken to ensure that prior habitat studies are carried out, potential carrying capacity determined, and competition with existing species minimized. If feed supplement is likely to be required at any time, prior budgetary arrangements should be made. It should be noted that behavioral changes occur in both introduced and indigenous species when artificial feeding is done in protected areas.

Protected areas located away from urban centers should attract low-density but high-quality activities. Tourists desirous to go an extra mile are usually more willing to pay the price. The important thing is to make sure the visit is memorable and rewarding. Expectations are high to receive tourists in Kiang West by October 1994. Hence there is an urgent need to put in place the mechanism for revenue collection, select and prepare basic resource materials, sensitize local communities and lay the groundwork for organized cultural events during village visits.

The Gambia River National Park/Baboon Island, from every indication, offers a unique experience and resource that should be developed. It would attract scientists and other tourists and could be an important source of income for DWCM and the local communities. What is important in the early stage is to determine and limit the level of visitation and prohibit feeding of the animals by tourists. Safety measures need to be taken first so as to reduce liability.

4.2.3 Increasing Park Revenues

Currently, the economic potential of the wildlife sector has been underexploited. Increasing park visitation and the admission fee per visitor would result in a substantial increase in economic returns. Available data (1994 DWCM Market Study) show that 75.6% of visitors to Abuko were in favor of increasing current admission fees. A manager of one of the hotels in the Kiang West National Park area also felt that an admission fee of at least D50 per tourist was reasonable.

Unfortunately, even the low rate of D15 per visitor has never been implemented outside Abuko Nature Reserve. In fact, in other parts of the continent, rates for admission into protected areas range from US$3-$16 per 24 hours. This is equivalent to D29-D115 per day. This does not include additional costs for a guide or porter (when required), which range from $4-12 per day (approximately D38-114). The consultants feel an admission fee of US$8-10 (approximately D76-95) is reasonable. It appears that following the 1994 market survey, progress has already been made by proposing a new rate at D85/adult visitors These rates are the same all year round regardless of the season. Since these new rates are expected to be effective 1 July 1994, they have been used in calculating the high and low revenue projections for the protected areas, as shown in Table 4.1. To encourage visitation by Gambians, it is

Gambians, it is recommended that the flat rate of D15/adult/visit be maintained for Gambians. School groups and children under 10 years should have free access to the parks protected areas but should be accompanied.

Table 4.1: Potential Revenues FY 94/95 & FY 96/97

	Expected No. of Visitors 94/95	High Estimate 1994/95	Low Estimate 1994/95	1995/96	1996/97
Abuko Nature Reserve	31,000	2,034,375	1,491,875	1,851,281	1,943,845
Tanji Nature Reserve	310	20,305	14,905	18,485	19,410
Kiang West NP (Tendaba) 50% (Kemoto) 50%	13,500 4,500	442,930 147,625	324,830 108,295	403,074 134,358	423,228 141,076
Gambian River National Park A boat/day x D250 (HIGH) 15 boats/month x D250 (LOW)		90,000	45,000	70,875	74,418
Gambia River National Park Special tours: 310 (95/96)x D200				62,000	65,100
Hunting Licenses 27 (HIGH), 19 (LOW) x D40		1,080	760	966	1,014
Bijilo Forest Park 4844 (HIGH), 4105 (LOW)		(377,895)	(233,090)	(275,492)	(289,267)
TOTAL	54,464	2,736,315	1,985,665	2,541,039	2,668,091

For both high and low estimates, the number of visitors remains the same and admission fee is the variable.

NB. **Some of the permits do not exist in the Gambia, and some existing permits are issued free of charge. Revenues for Bijillo forest park are not included in the total estimates since they are not paid into the treasury. Revenues from the airport departure fee of 10 pounds sterling per person, hotels and restaurant exploitation fees etc. are also not included.**

The new rates are summarized as follows:

Non-Gambian Adults	D85	Gambian Adults	D15
Non-Gambian Child	D55	Gambian Child	Free

There is a built-in flexibility here for price discrimination by the DWCM between non-national residents and international visitors.

In FY 1992/93 about 29,312 visitors to Abuko paid an average fee of D12.50. Total revenue was D366,400. Estimates of potential revenues are based on the assumptions that:

- There will be approximately a 5.8% increase in the number of visitors to Abuko, based on past trends and future plans.
- 25% of all visitors would be Gambians and only half of these (12.5%) will pay D15/day.
- The 1994/95 high estimate is equal to 75% of visitors times D85 plus 12.5% of visitors times D15. The 1994/95 low estimate is equal to 87.5% of visitors times D55.
- The 1995/96 estimate is derived by averaging the high and low estimates of 1994/95 and allowing for an increase in the number of visitors.
- The 1996/97 estimate is equal to the 95/96 estimate plus a 5% increase.
- The new admission fees will be implemented in FY 94/95 and D100 for Gambia River National Park in FY 95/96.
- Revenues are expected to increase by 5% annually.
- A revenue collecting mechanism is put in place.

The assumption for an increased number of visitors is based on the analysis in Section 3, as well as the planned infrastructural developments in the parks and protected areas.

Estimates for FY 1994/95 stand at D2,736,315 (HIGH) and D1,939,905 (LOW). With an estimated annual increase of 5%, the expected revenues are D2,417,198 for FY 95/96 and D2,547,559 for FY 96/97.

Collection Mechanism

The GOTG financial procedures stipulate that only the Accountant General will appoint revenue collectors who are accountable to that department. All revenues collected also are paid to the Government Treasury. Where there is no revenue collector, or in cases where tour operators or hotels take groups of people into protected areas, the DWCM establishes a bill at the end of every month and the amounts collected are paid into the Government Treasury. Revenue collectors would have to be appointed to Tanji Nature Reserve and Kiang West National Park by July 1994, when these become operational.

4.2.4 Increasing Visibility of Parks

In order for the revenue increases to be realized, The Gambia's national parks and reserves must become more visible to tourists and Gambians. The task of increasing visibility is a complex one. The review of the tourist industry in Section 3 of this report indicated that

the country is fortunate to have an identifiable leisure market, namely the air-chartered tourist from Europe. Perhaps the key issue here is not "increasing" but "establishing" the visibility of the parks. We suggest the following strategy for accomplishing this objective:

- Since air-chartered tourists purchase their package through major tour operators in Europe, tourist information on the parks (infrastructure, activities, rates, hours of operation, seasonality, maps, etc.) should be incorporated into their brochures on The Gambia. It is easier for tourists to purchase the national parks component as an element in their inclusive package.

- The three-year EEC marketing program for The Gambia provides a timely opportunity for local hotels, lodges and tour operators to integrate information on the parks into their tourism promotional packets. This is a critical linkage, particularly for the non air-chartered visitor visiting The Gambia. A well-publicized tour package or excursion to a national park made available through a hotel or tour operator provides awareness opportunity.

- The Gambia has a European tourism office based in London for marketing and promotion. The Ministry of Information and Tourism also participates in major international trade shows such as the annual ITB in Berlin. With the right information packets, advance preparation and salesmanship, the visibility of the parks can be established and increased.

- The Gambia is not widely known in the North American market, and very few people identify it with the film or book entitled *Roots*. It is critical for The Gambia to diversify its market base beyond the narrow dependence on the European market. The impact of the recent deep economic recession in Europe attests to the consequences of this dependence. Awareness on the US and Canadian markets are critical, and we believe the Africa Travel Association with its nearly 400 tour operator and travel agent membership can facilitate the establishment of The Gambia in the North American market as a multiple destination with diverse products.

- Additional visibility of the parks can be achieved through:

  - Distribution of park information on in-bound flights and video presentation on airline flight entertainment systems, particularly from Europe and North America.

  - Video presentations in hotel rooms focusing on what to do in The Gambia.

  - Pre- and post-conference tour information sent to participants with conference and hotel registration information.

  - The Gambia's tourism logo should modify the industry phrase "the smiling coast" to reflect the inland tourist product.

  - Distributing tourism information on parks at the airport with the passenger embarkation card.

- Inviting foreign travel writers for major travel magazines to cover The Gambian parks for feature articles.

- The Ministry of Information and Tourism (MIT) should utilize the radio and newspapers to raise the visibility of the parks system and what it has to offer tourists. The MIT has the capacity, expertise and experience required, and should be designated to do the final information production and distribution. It should, however, work in close collaboration with the DWCM.

4.2.5 Improved Park Safety and Attractiveness

In the Abuko market survey, visitors expressed concern over their safety away from the entrance. The major problem is that of communication. The same holds true for all the Parks and Nature Reserves. To allay visitors' fears, management should:

- Train guides and wardens
- Provide guards/guides with communication equipment that allows them to stay in touch with headquarters in the event that a visitor has a problem while in the Park
- Provide detailed maps and interpretive material
- Provide emergency first aid facilities

Three types of work can be undertaken to increase the attractiveness of national parks to tourists and occasional visitors. Fire is the single most important tool used in habitat management, although it is also among the most risky. When properly used, it increases visibility, reduces the build-up of dry matter and consequently reduces destructive crown fires. It can be used in habitat manipulation to achieve and maintain specific plant and animal communities. Suppression of fire is not in any park's best interest, but there is already too much burning in Kiang West National Park and Bao Bolong Nature Reserve. Any further use of fire should be monitored very carefully.

Roads are the most essential facility into and within the National Parks. They can lead to abuse as a result of easy access, location on fragile soils or through special habitats that should otherwise be protected. Construction of wide, straight roads should be avoided. Since the faster one drives the less one sees, an elaborate network of roads must be avoided and guidelines established for driving in the parks for safety, comfort and ecological reasons. Walking tours including hiking and nature walks are a better way to see more wildlife. Small groups avoiding noise, radios and smoking when on a trail should be encouraged.

A good interpretive program and well-trained guides and drivers allow visitors to see what is available rather than just what they expect to see. A well-structured course should be given to guides and drivers to ensure that the visitor derives maximum benefits from a visit.

A number of other management improvements can also be made to enhance the enjoyment of visitors, including:

- At Abuko, repair and upgrade equipment in the education center; maintain hides and trails, improve toilets.
- Construct/repair observation points and hides at other parks.
- Construct/improve picnic sites, benches and toilets.
- Improve the quality of enclosures at Abuko.

- Construct overnight camps or lodges where trips into a park may require more than a day.
- Increase the variety of documents sold at the entrance of Abuko.
- Identify and label plants along trails.
- Produce information on the biological resources, history and culture of communities living next to protected areas.
- Study the need to bring other wildlife species into Abuko.
- Install radio-communication links between DWCM and all parks and nature reserves.

4.3 Options

Revenues generated in FY 92/93 from wildlife parks and nature reserves came mainly from Abuko (D366,390) and from hunting licenses (D440). An average annual increase of 7.8% visitation from 1990-1993 yielded an annual average increase of 5.1% in revenues. Although the sector is capable of bringing in more revenue, its potential has not been fully exploited. Meeting the challenges of managing the resource base has required financial resources in excess of the financial returns. While improving on the management of an ever-increasing number of protected areas, one of the objectives has been to increase cash-flow in order to bridge the gap between revenues and expenditures. To do this, there are five options from which to choose:

Option 1. The sector is left as is; no development or improvement of facilities, no increase in admission fees, and no attempt made to collect fees from new sources.

Option 2. Admission fees into protected areas are not increased, but are collected from all protected areas.

Option 3. New infrastructure, development and repairs are made before increasing admission fees.

Option 4. Admission fees are substantially raised to D85/person for non-Gambians and D15/person for Gambians, without any changes to the existing facilities.

Option 5. Admission fees are raised, new revenue sources are taken on board, a collecting mechanism is put in place and progressive upgrading of facilities and infrastructure is carried out over three years. (This option assumes that the Ministry of Finance will allow the increase in generated funds to be retained at the level of the Parks.)

In the 1994 market study, 75% of the visitors to Abuko expressed readiness to pay a higher admission fees. During discussions in the field, two proprietors (Tendaba and Kemoto Hotels) expressed their surprise at the fact that the GOTG had not taken steps to collect revenues at Kiang West National Park. They even offered to collect admission fees themselves.

Options 1 and 2 are not viable because admission fees have not been increased since 1988, despite the tacit acceptance of a higher fee has been expressed by visitors. Option 3 fails to recognize the fact that the marketable resource has long been undervalued and that a balanced budget cannot be achieved when investments continually exceed revenues. Option 4 has not been retained because it has no fee collection mechanism. In year one, the expected

increase in revenues (from D421,823 in FY 92/93 to about D1,985,665 in FY 94/95) could provide enough funding for further investment in the sector.

Option 5 is the best choice because after the new fees are implemented, both tourists and local communities would begin to see positive changes as evidence that the increase was in their interest. Visitation may actually increase, and recurrent costs could be met without undue strain. More funds would be released for park management, particularly after the first year, given the lag between fee collection and the release of funds for making improvements.

4.4 Analysis and Policy Implications

Based on observations and available data, in the short term the tourism demand for Gambian parks is inelastic and there are substantial opportunities for expansion. The estimated number of tourists who would visit protected areas in FY 94/95 is 54,154. This represents 70% of the tourists arriving on chartered flights or 40.5% of the total foreigners arriving in The Gambia.

The increase in admission fees and the expected increase in revenues is based on the assumption that the Government will provide the funds or allow new revenues for the development and improvement of protected areas and the staff to manage them. The only policy implication is the requirement for the Government to issue an order implementing the increase in fees. This should be done without further delay, to give the DWCM the time to work with relevant public and private sector organizations and to prepare the required revenue collection documents.

SECTION FIVE
BUDGETARY REQUIREMENTS AND REVENUES DISTRIBUTION

5.1 Introduction

The GEAP provides a framework within which The Gambia's environment will be managed in a sustainable manner. It recognizes the cross-sectoral nature of the environmental problems being addressed, the need for active participation of all agencies concerned and in particular, the involvement of local communities in the management of natural resources. Some of the most serious constraints to the implementation of the GEAP are human, material and financial resources. These constraints have led to the inability of the MIT to collect fees from hotels, lodges and restaurants and the DWCM's inability to collect revenue for visits to some protected areas.

5.2 Personnel and Operating Budgetary Requirements for Implementing the Parks Portion of the GEAP

The current staffing level for the DWCM is 35, broken down as follows: Administration (14), Education and Extension (5), Park Management (6), Research/Crop Damage Assessment and Control (5), and Surveillance (5); there are also 28 seasonal non-pensionable employees. Both in terms of numbers and quality, this is insufficient to carry out the protection, management and development activities of the Department. The DWCM now operates in the entire country and will require a substantial increase in resource allocation. DWCM staff expenditures in FY93/94, amounting to D413,227 for 35 staff, are expected to rise to D769,180 due to staff requirements for the various protected areas.

5.2.1 Operational Requirements

The budget for FY 94/95 has already been prepared and we are assuming that it will be the same for FY 93/94 (D982,270). Our first-year estimates are for FY 95/96. The anticipated staff and operating cost of the entire department for FY 95/96 (D949,000) represents only 47% of anticipated revenue. Other requirements for the six protected areas and the DWCM stand at D2,288,000 for FY 95/96 (See Table 5.1). Over 92.8% of this amount is for the purchase of vehicles, radio communication equipment, boats and construction.

Table 5.1: Summary of Operational Budgetary Requirements for 1995/96

Item	DWCM	Abuko	Tanji	Kiang West	Bao Bolong	Nuimi	Gambia	Total
Staff Costs	212	125	72	166	42	91	63	771
Equipment	418	396	232	-	210	212	190	1,658
Development	-	420	45	-	25	140	-	630
Running Costs	95	62	2	-	12	5	2	178
TOTAL	725	1,003	351	166+	289	448	255	3,237

TOTAL Requirement for all items:	**3,237,000**
Salaries for all Staff & Operating Costs:	**949,000**
Equipment, Development & Operating Costs:	**2,288,000**

A detailed set of tables showing operational budgetary requirements for each of the six protected areas in The Gambia are found in Annex D.

Table 5.2: Projected Budgetary Requirements Over 5 Years (Excluding Training and Equipment)

Item/Activity	Costs in '000 DALASIS (Current)					Total
	Year 95/96	Year 96/97	Year 97/98	Year 98/99	Year 99/00	
1. Salary/Personnel Costs						
Headquarter Staff	212	223	234	246	258	1,173
Abuko Nature Reserve	125	131	138	145	152	691
Tanji Nature Reserve	72	76	79	83	88	398
Kiang West National Park	166	174	183	192	201	916
Bao Bolong Nature Reserve	42	44	46	49	51	232
Niumi National Park	91	96	100	105	111	503
Gambia River National Park	63	66	70	73	77	349
Sub-Total	**771**	**810**	**850**	**893**	**938**	**4,262**
2. Operating Costs						
Daily Paid Labor	183	193	202	212	222	1,011
Feeding of Animals	50	53	55	58	61	277
Stationery	15	17	18	19	20	89
Production of Brochures	20	20	20	20	20	100
Veterinary Drugs	15	15	15	15	15	75
First Aid	5	5	6	6	7	29
Misc 5% including Rents	14	15	16	17	17	79
Sub-Total	**302**	**317**	**332**	**347**	**362**	**1,660**
3. Construction/Improvement/ Publicity						
Education Centers Abuko NR	100	-	15	-	96	211
Construction of Photo Hides	10	10	10	10	-	40
Visitor Centers	80	80	80	80	-	320
Toilets	10	20	12	5	5	52
Kiosks/Stalls	-	10	-	-	-	10
Park Headquarters	15	80	-	5	80	180
Production of Publicity material	40	40	40	40	40	200
Providing water to Pools - Abuko	-	50	25	-	10	85
Repair of Animal Cages	200	-	50	50	-	300
Sub-Total	**455**	**290**	**232**	**190**	**231**	**1,398**
4. Management						
Park/Reserve Boundary Surveys	-	-	150	-	200	-
Development/Repair of Trails	7	7	8	8	8	38
Development Nuimi NP	-	-	-	-	50	50
Dev. River Landing Site - GR/NR	-	-	-	50	-	50
Plant & Animal Studies/ Invents.	20	40	40	40	40	180
Fire breaks	20	20	20	20	20	100
Repair of trails & Park Roads	20	20	20	20	20	100
Others 5%	7	9	9	14	14	53
Sub-Total	**74**	**96**	**247**	**152**	**352**	**921**
TOTAL	**1,602**	**1,513**	**1,661**	**1,582**	**1,883**	**8,241**

Table 5.2A: Projected Budgetary Requirements Over 5 Years (Training and Equipment)

	Course/Item	No. of Courses/Items Required					Cost
		Year 95/96	Year 96/97	Year 97/98	Year 98/99	Year 99/00	
1.	**Training**						(US$)
	Out-of-Country Training						
	Mweka College, Tanzania	5	1	2	2	2	3,456
	ICCE/UK	3	-	-	1	-	307
	International Parks Seminar USA	-	1	1	1	-	24,000
	Egerton University, Kenya	-	-	2	-	-	60,000
	In-Country Training						
	Wildlife Rangers	x	x	x	x	-	40,000
	Management Seminars	-	x	-	x	-	
	Safety & Anti-poaching Seminars	-	x	-	x	-	13,000
	Parks and People Village Community Workshops	x	-	x	-	x	19,500
	Refresher Courses for Parks & Wildlife Staff	-	-	-	x	-	15,000
	Sub-Total						$563,500
2.	**Equipment**						(Dalasis)
	Vehicles + 35% Costs	1	1	2	1	3	2,052
	Boat + Engines	-	1	1	1	1	130
	Mopeds	2	-	2	-	2	55
	Bicycles	6	6	8	8	8	36
	Radio Communication Equipment	-	-	-	-	-	400
	Computers	2	-	-	-	-	55
	Solar Panels/Energy	-	1	1	1	1	800
	Weapons + Accessories/Surveillance	-	-	60	-	-	60
	Uniforms + Accessories	-	80	-	-	-	80
	Sub-Total						D3,820

5.2.2 Training

The GEAP recognizes that one of the most serious constraints faced in the implementation of the GEAP is the limited capacity in environmental and natural resource management in the country. It states that attention be given to capacity building at all levels in the form of in or out-country, short or long term training.

Table 5.3 contains the long- and short-term training requirements. A total of 28 staff will require out-of-country studies, preferably at the College of Africa Wildlife Management in Tanzania. In-country (3-4 weeks) training should be offered to 60 rangers. Staff from the Department of Forestry could be invited to join, and the facilities of the Hotel Management School could be used. Wildlife, Parks and Forestry Rangers would be trained to guide tourists. Private hotel owners and Tour Operators may be able to use these opportunities to train their guides. Some external help might be necessary for the first training course with preparation of training manuals and teaching. Local capacity could be developed to handle subsequent courses and could be drawn from MNR, MOA, MIT, DOF and DWCM.

Table 5.3: Long and Short-Term Training Schedule

Year/Date	Training Level/Institution	Duration	Staff	No.	Cost US$
1994/1995					
5/94	Diploma, Wildlife Mgmt, Mweka, Tanzania	2-years	Warden	1	30,000
9/94	Diploma, Wildlife Mgmt, Mweka, Tanzania	2-years	Warden	2	60,000
9/94	Conservation Education, ICCE/UK	1-3 mos.	Assist. Warden-Educ.	2	16,000
9/94	Certificate, Wildlife Mgmt, Mweka, Tanzania	2-years	Senior Ranger	2	60,000
4/95	Wildlife Ranger Training, In-country	3-4 wks.	Wildlife Rangers	16-20	10,000
5/95	Conservation Education, ICCE/UK	1-3 mos.	Assist. Wildlife Cons. Officer	1	10,000
1995/1996					
6/95	International Seminar on Parks, USA	1-3 mos.	Assistant Director	1	8,000
9/95	Post Graduate Studies, Mweka, Tanzania	2-years	Wildlife Conservation Officer	1	30,000
4/96	Wildlife Ranger Training, In-country	3-4 wks.	Wildlife Rangers	16-20	10,000
1996/1997					
6/96	Diploma, Egerton Univ. Wildlife, Kenya	2-years	Warden/Cons. Officer	2	60,000
7/96	International Seminar on Parks, USA	1-3 mos.	Director DWCM	1	8,000
9/96	Refresher Course on Parks & Wildlife, In-Country	4-6 wks.	Wardens & Senior Rangers	15-20	15,000
9/96	Certificate, Wildlife Mgmt Mweka, Tanzania	2-years	Senior Rangers	2	60,000
4/97	In-country Wildlife Training	3-4 wks.	Wildlife Rangers	16-20	10,000
1997/1998					
6/97	International Seminar on Parks, USA	1-3 mos.	Sr. Wildlife Cons. Of.	1	10,000
9/97	Certificate Wildlife Mgmt, Mweka, Tanzania	2-years	Senior Rangers	2	60,000
4/98	Wildlife Ranger Training, In-Country	3-4 wks .	Wildlife Rangers	15-20	10,000
6/98	Refresher Course Wildlife and Park Management, In-Country	4-6 wks.	Wardens & Senior Rangers	15-20	15,000
1998/1999					
6/98	Diploma/M.S. Wildlife Econ. Policy & Practice, Canterbury/Jersey, UK	1-2 years	To be identified	1	8,000
9/98	Diploma, Wildlife Management, Mweka, Tanzania	2-years	Warden/Assist. Warden	2	60,000
5/95	Parks & People Workshop for Village Communities	1 day	Selected Park Villages	5	6,500
3/96	Safety and Anti-poaching Training	5 days	Rangers	1	3,500
4/96	Management Seminar	1 week	Senior Staff DWCM	1	6,500
5/96	Parks & People Workshop for Village Communities	1 day	Selected Park Villages	5	6,500
4/97	Parks & People Workshop for Village Communities	1 day	Selected Park Villages	5	6,500
4/98	Safety & Anti-poaching Training	5 days	Rangers	1	3,500
6/98	Management Seminar	1 week	Senior Staff DWCM	1	6,500
3/99	Parks & People Workshop; Evaluation of Awareness & Commitment	1 day	Selected Park Villages	5	6,500

5.3 Distribution of Current and Potential Park Revenues

Current park and wildlife revenues estimated at D500,000 for FY 94/95 are paid into the GOTG Treasury. There is a mechanism for its collection but none for its distribution between government, on-line agencies and local communities. There is an obvious need for more technical staff and financial resources to meet the challenges of managing an increasing number of protected areas, responding to the needs and demands of an increasing number of tourists, and reacting promptly to management situations in the field. Reinforcing DWCM's capacity to provide attractive and well managed parks requires that some of the revenue raised by this department (estimated at D1,985,66, Low for FY94/95) be given back to the department for the management of parks, nature reserves and some of park community co-management initiatives.

Potential Avenues for Revenue Distribution

In order to reach better rationalized revenue collection and distribution in the sector, it is recommended that a Wildlife Development Fund (WDF) be created. This Fund would be similar to the Fisheries Development Fund and would give the DWCM the resources to accomplish its objectives. It should be made up of 50% of the total revenues collected by the sector, of which 33% will go to the local communities. The resources of this WDF could be used for a wide variety of activities. Among the most important, the team has identified:

- Identification of plants in Protected Areas
- Identification and inventory of animals
- Bird identification & preparation of check lists
- Aquatic bio-diversity investigations
- Purchase of communication equipment for Parks
- Production of tourism and environmental education materials
- Purchase and up-keep of equipment and infrastructure
- Material assistance for capacity and leadership building in selected village communities

It is further recommended that 10% of the total revenue generated should be allocated to the Ministry of information and Tourism (MIT) for its work in ecotourism development, marketing, informational materials and promotional activities. The 10% should come from the 50% that goes to the governments general treasury (leaving a net revenue of 40% for the government treasury).

5.4 Co-Sharing and Technical Assistance Requirement for Community and Co-Managed Parks

While the concept of co-management of natural resources is currently being examined in other parts of Africa (i.e. the Lupande Project in Zambia, the Amboseli National Park in Kenya and the Korup Project in Cameroon), observations in the field have led us to conclude that implementation of such a program here would require simultaneous leadership and capacity building activities in the communities.

Active participation of local communities depends on such factors as education, community leadership and dynamics, material and human resources. In the Kiang West National Park, the literacy rate in the adjoining communities is very low. Organization of

community groups with the exception of men and women's *Kafos* (groups) is very weak. The Village Development Committees (VDCs) and Technical Advisory Committees (TACs) which should be the driving force in rural communities and the forum for identifying community priorities, either do not exist or are non-functional where they do. The lack of community organization and capacity is therefore an impediment to cost-sharing and co-management of a park. It is critical to address this deficiency immediately through the ANR Grants Program.

Both in the Kiang West National Park Area and the Bao Bolong Area, men's *Kafos* were said to be inactive while women's *Kafos* appeared to be relatively more active. Most of the work, including fire-break clearing and boundary tree planting, is being done by women. It was reported that women earned over D250,000 last year working at Kiang West National Park. Unfortunately, women are not represented on the TAC. Because of the organizational, gender and literacy problems, placing large sums of money at the level of a rural community can become a problem. Nevertheless, local community institutions are the mobilizing force among local people. Community groups or organizations can form an excellent link between Government/Donor and Community. Dialogue between the Park Administration and the local communities should continue on a regular basis and community institutions should be supported.

Technical Assistance to the local communities will be useful in the following areas:

- Support for effective and regular discussions with local people about Park Management Objectives.
- Capacity and leadership building through a number of training programs (crafts, agriculture, tour guides from local villages).
- Institution building and support to VDCs, TACs, *Kafos* and Village Cooperatives.
- Training in the management of local camps and small businesses, such as construction and hiring of canoe and boats to visitors.
- Construction and management of over-night camps with proceeds shared between Management, Community, and Government.

What is important is not so much the amount of money a community gets, but the role that community plays in the management and use of resources within and around a protected area.

In the Kiang West and Bao Bolong Areas, village communities have continued to carry out such activities as:

- Hunting of mostly wart hogs
- Bee-keeping in the park
- Collection of building and fencing materials
- Collection of oysters and oyster-shell ash
- Fishing
- Farming of rice in the flood plains

Traditionally, these activities are not allowed in national parks and nature reserves, but buffer zones can allow controlled levels of natural resource exploitation by local communities. This Gambian experience might be one that could be replicated elsewhere, if it can be monitored and activities established at levels that do not destroy the resource base.

SECTION SIX
SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

The agreement between the GOTG and USAID/Banjul regarding the ANR program states that the GOTG will carry out a study of parks revenue and budgetary requirements as one of three studies required to meet the terms of conditionalities numbers 7 and 9. Specifically, the agreement states that the GOTG will study the following issues:

- Present and projected revenue flows
- Options for retention of a portion of revenues by the resource-generating sector, including line agencies, independent boards, area councils, and communities
- Personnel and operational budgetary requirements for implementing the parks component of the GEAP

The results of this study will underpin the policy measures to be undertaken to meet the July 1994 deadline for conditionality number 9. The objective of this study therefore, is to provide adequate information to enable the GOTG to make informed choices about fee levels, collection mechanisms and revenue distribution.

6.1 Summary

The expenditures of tourists are expected to be the primary engine of revenue generation in the parks sector. Tourism in the Gambia has substantial potential for growth through diversification of the traditional "sun and surf" product. The basis of this potential is the wildlife resources and the wilderness experience of the country. With the total number of tourist arrivals in The Gambia at 133,864 visitors in 1993, the industry registered 16.2% and 14.0% increases in arrivals in 1992 and 1993 respectively. Total revenue from tourism in 1993 was 558.9 million Dalasis or US$60.1 million. It has been estimated that tourism may account for as much as 10% of Gambian GDP.

In addition to tourism's contribution to the economy, linking tourism to the conservation, management and utilization of parks and wildlife resources creates economic opportunities for rural communities. Taken together, tourism and wildlife management have considerable potential for both national and rural development.

6.2 Conclusions

- From both supply (resources) and demand (tourists) perspectives, The Gambia has the potential to develop a regionally competitive wildlife-based tourism, as a multiple destination offering to both leisure and business visitors.

- Appropriate infrastructure must be provided in the parks system to ensure a quality tourism product and service delivery that maintains customer (tourists) satisfaction for retention and expansion of market share.

- In specific terms, The Gambia is entering into a new area of eco-tourism development. This is a new phenomenon which is not yet well understood. In order to minimize the adverse impacts while maximizing the economic, social and

environmental benefits, such issues as environmental and social carrying capacity must be studied and consistently monitored.

- A portion of revenues generated by the increased flow to the parks should be invested in conservation, management and development of the park system, which includes the adjacent communities.

- For this new venture to succeed, an institutionalized public and private sector partnership must be formalized between and among such entities as the DWCM, MIT, overseas tour operators, local ground handling service companies, accommodation operators, DOF, MOA, specialized groups (such as ornithological associations) and especially the local communities. Regular meetings and conferences should facilitate active participation in the evolution of an expanded tourism product.

- The Gambia also possesses rich historical and cultural resources which can be developed and incorporated into its tourism product. We urge serious efforts in this area in order to conserve, restore and manage these cultural relics and monuments.

- To supplement revenue earned from eco-tourism activities, a parks donation concept should be examined whereby visitors and private sector operators contribute to special projects in the parks and its communities. Such donations can be cash or in-kind (books for schools, etc.). The World Worldlife Fund's "money pool" at airports should also be tried. Most tourists leaving The Gambia have some local currency in their pocket, which is effectively worthless outside the country. If theft-proof receptacles were installed at the airport or in hotels, the collection potential would be enormous.

- It is not too soon to explore the idea for a botanical garden, zoo or aquarium to highlight the flora, fauna and hydrological/marine life of The Gambia.

6.3 Recommendations

6.3.1 Policy

The following observations can be made with respect to policy issues:

- Wildlife, National Parks and Nature Reserves Management practices have evolved over the last decade, yet The Gambia's Wildlife Conservation Act of 1977 has remained unchanged over the last 17 years.

- Park revenues have remained very low due in part to the low admission fees or lack of fees in some parks.

- The means available to the DWCM have been limited, thereby restricting the department's activities in developing and improving potential revenue sources.

Recommendations

- The Wildlife Conservation Act of 1977 should be reviewed and updated to reflect current realities and include provisions for multiple use and greater community participation.

- The name of the DWCM should be changed to Department of Parks and Wildlife Management (DPWM) to reflect the mandate of the Department. This should be taken into consideration when reviewing the Wildlife Conservation Act, as park planning, development, management and administration go much beyond wildlife conservation and management.

- Authority should be granted to establish a Wildlife Development Fund (WDF) or a Below-The-Line Account.

- The decision on the increase in admission fees to parks and reserves should be made soon to enable its implementation in FY 1994/95.

- More qualified staff should be provided to the DWCM, in order to enable it to operate effectively and efficiently. A policy should be implemented to actively develop the management capabilities of the personnel of the Wildlife, Parks and Reserve administration.

6.3.2 Research

The 1994 Market Survey carried out at Abuko provided useful information for the management of the area, and the additional questionnaires in the PBS will collect more data on tourists. Information on disembarkation cards at the airport is useful for analysis of the tourist trade. Research in other areas is generally lacking, particularly on the biodiversity of protected areas.

Recommendations

- The questionnaires administered at Abuko should be extended to cover other protected areas, and they should be analyzed in collaboration with the Ministry of Information and Tourism (MIT).

- The social impact of tourism on local communities should be studied and monitored.

- The impact of tourism on parks in terms of carrying capacity should be studied and monitored.

- Biodiversity research should be carried out to provide base line information required by management.

- Guidelines for multiple use should be developed for areas where local people depend on protected area resources for their survival (Kiang West National Park and Bao Bolong Nature Reserve).

Given the current small size and the limited technical capacity of the DWCM, the research activities recommended here will have to be contracted out through short-term technical assistance, while staff development and training in the DWCM continues.

6.3.3 Wildlife, Park Management and Training

In this domain, two fundamental observations can be made:

- The six parks and reserves are all located in the western half of the country. The potential for tourism is enormous and the need for field staff and equipment is likely to grow.

- The DWCM is understaffed (35 pensionable and 28 daily paid laborers), hence most parks are not adequately staffed. It is unlikely that the 39 additional staff required to meet the personnel needs of DWCM will be provided in FY 1994/95. To develop parks and increase revenues, priority areas such as Tanji and Kiang West National Park must be provided with staff and funding. Training is also necessary at all levels.

Recommendations

- Studies should be carried out to identify ecosystems in the eastern half of the country for future protection.

- The DWCM should acquire basic field equipment such as camping equipment, binoculars, fishing gear for hire to visitors until such time that the private sector is able to satisfy this demand.

- The DWCM should work closely with the EIS and use the information available from aerial photo-interpretation.

- Staff from DWCM headquarters in Banjul should be redeployed to other protected areas at an accelerated rate.

- In-country short training courses of 3-4 weeks and 4-6 weeks duration should be organized for Park and Forestry Rangers as a means to rapidly improve on the technical capability of the staff of DWCM.

- The training of Rangers should be preceded by the preparation of appropriate practical training manuals.

- Given that the staffing situation of the DWCM is characterized by a near absence of top and middle-level staff, the training schedule in ANR document TD/94/003 should be adhered to, as well as the five-year staff training requirement schedule in this report.

- Efforts should be made to secure the services of a qualified Technical Assistance Staff for the DWCM while senior staff are being trained abroad.

6.3.4 Park Villages

Village communities located next to national parks lack the capacity to participate effectively in managing the park resources. The framework for capacity building exists (VDCs, TACs and *Kafos*) but are not currently active. The ANR Training Needs Assessment also identified village level training needs.

Recommendations

- The ANR grants program should be geared to strengthening capacity in village communities neighboring on parks. Village communities should be encouraged to identify their priority needs. Activities such as crafts production, craft-shops, building and operating canoes, and hotels/accommodations for tourists could be co-funded with a share of park revenues.

6.3.5 Inter-Agency Coordination

In Kiang West National Park and Bao Bolong Nature Reserve, wildlife resources are of prime importance; however, agriculture, forestry, tourism and a number of private sector agencies also have a role to play, including tour and lodge operators and river transportation agencies.

Recommendations

- The newly established ANR Working Group (ANRWG) should define the involvement of each ministry and agency in the multiple-use issues of the area. The Ministry of Information and Tourism should be included in the ANRWG.

- A periodic evaluation of the sector should be carried out to review progress made, difficulties encountered and offer possible solutions.

6.3.6 International Assistance

Two of the six parks and reserves are not only international protected areas, since they lie along the Senegal-Gambian boarder, but are also important wetland ecosystems. Most Gambian parks and reserves (Tanji, Bao Bolong, Kiang West, Niumi and The Gambian River Nature Reserve) are wintering grounds for migrant birdlife. Biodiversity research and the protection of these areas is highly desirable.

Recommendation

- Assistance should be sought from EEC, UNESCO, IUCN, WWF, and bilateral organizations for the protection and management of parks and park reserves.

6.4 Action Plan

An action plan to implement the preceding recommendations and to meet conditionalities 8 and 9 is presented below. Actions required are identified along with the approximate timing for the implementation of each set of actions.

6.4.1 Actions Required in 1994

Revenue collection and budgetary allocation

Relevant GOTG agencies including MNR, Ministry of Finance, and MIT should discuss the specifics for revenue collection in the expanding parks system. The parameters for establishing levels for annual DWCM budgetary allocations with the flow of park revenues must be worked out. Increased park revenues should in no way result in a reduction of the DWCM's budget allocations.

Specific actions required: (i) approve the new (recommended) parks admission fees; (ii) assign revenue collectors to the new parks and protected areas, particularly Tanji and Abuko; (iii) formalize the commitment to allocate an agreed proportion of revenues to the DWCM budget, (iv) establish a Wildlife Development Fund and/or a Below-the-Line Account for 50% of the total revenues collected by the parks sector; (v) commission a detailed study to examine the comprehensive actions necessary to enable the DWCM headquarters and field offices to effectively collect admission fees, generate additional revenues independently or with the private sector, as well as properly distribute the revenues especially the 33% (from the WDF) to the local communities; and (vi) establish a strong and ongoing collaborative relationship with the MIT including revenue sharing, not below 10% of total revenue generated, and determine the effective utilization of this amount for relevant parks tourism development activities including marketing and promotional activities.

Operational procedures and standards

The MNR planning unit, DWCM and ANRWG should organize a series of meetings to discuss issues related to the completion of facilities and the establishment of effective operational procedures and standards at the new parks particularly Kiang West National Park and Tanji Nature Reserve. The objective of these discussions is to ensure that revenues are effectively generated and collected.

Specific actions required: (i) ensure the completion of infrastructural development at Kiang West and Tanji; (ii) provide operational staff; and (iii) begin promotional activities of the parks through local Gambian tour operators and camp/lodge operators in order to generate traffic to these new parks during the peak 1994 winter tourist season.

Wildlife Conservation and Management Act

The MNR and DWCM, should begin laying the groundwork for the review and enactment of a new Wildlife Conservation and Management Act.

Specific actions required: The ANRWG should convene meetings to examine the technical, and legal aspects of a new wildlife conservation management act which reflects the policy issues pertaining to: (i) the new parks system; (ii) conservation and management; (iii) expanding parks utilization; (iv) community needs; and (v) the role of other government agencies such as MOA, NEA as well as the private sector (riverboat operators, "safari" operators and camp/lodge operators).

DWCM's Staff Levels and Training

The MNR and DWCM should discuss ways to increase DWCM staff levels and the technical, managerial and administrative training needs for headquarters and field personnel.

Specific actions required: (i) establish long term staffing requirement of the DWCM: (ii) identify training courses, both local and abroad; (iii) establish training scheme and priorities; and (iv) seek funding from donor community to supplement budgetary allocations.

Revenue sharing and co-management with local communities

The MNR Planning Unit, ANRWG and the DWCM should schedule meetings to establish processes for determining the revenue sharing agreements with participating local communities. Following these internal meetings, initial discussions should take place between the DWCM and prospective participating communities to discuss their involvement in the co-management of the parks and technical aspects of wildlife and park resources management.

Specific actions required: (i) determine optimal revenue sharing agreements with each community (based on such criteria as population size, effects of parks development and local capacity); (ii) assess capacity building needs necessary for parks related enterprise development; (iii) hold discussions with VDCs, TACs and *Kafus* to evaluate their roles in revenue sharing and co-management activities; and (iv) identify areas where the ANR grants program can support capacity building activities of the local communities as a necessary step toward utilization of shared parks-generated revenue,

Clarification of MNR and MIT activities

The MNR should take the initiative to convene a series of meetings with the MIT to discuss critical issues related to tourism components in the parks development, promotion and management.

Specific actions required: (i) increase MIT's participation in the ANRWG; (ii) determine areas of cooperation between the DWCM and MIT; (iii) discuss modalities for the promotion and marketing of the parks system in order to generate increased visitation; and (iv) hold discussions on emerging issues and operations of the parks with key players in The Gambian tourist trade (tour operators, ground handling services, hotel operators and representatives of overseas operators).

Internal DWCM activities

The DWCM should set up internal meetings to examine strategies for managing the wildlife and parks resources; implications for expanded tourism development and the management of the parks on a sustainable basis.

Specific actions required: (i) organize a workshop to discuss an agenda for studying and monitoring the economic, social and ecological issues of the parks system; (ii) establish an agenda for further studies by external consultants on impact of tourism on the social and ecological carrying capacity of the park areas; and (iii) examine the modalities for the transition of the DWCM to the Department of Parks and Wildlife Management (DPWM) with an expanded mission.

6.4.2 Actions Required in 1995-2000

In the medium- to long-term, a number of additional activities should be undertaken:

- Provide park rangers, guides and other DWCM staff with basic equipment including transportation, (pedal bikes, mopeds) two-way radios, uniforms and boots.
- Carry out appropriate local and overseas training.
- Establish a wildlife donation system and "money pools" at the airport.
- Organize semi-annual or quarterly conferences to review DWCM achievements and plans.
- Strengthen the record-keeping system of the DWCM.
- Expand the 1994 market study to other parks.
- Improve infrastructure at Abuko.
- Review and strengthen the parks revenue collection and allocation structure.
- Expand and monitor avenues for additional revenue generating activities in the parks, particularly those that involve local communities.
- Initiate discussions with relevant government agency on allocating part of airport departure fees to the MIT to promote park attractions.
- Accelerate development of the Bao Bolong and the River Gambia National Parks with emphasis on revenue generation.

ANNEX A
TERMS OF REFERENCE FOR THE STUDY

A. Background

The agreement between the GOTG and USAID/Banjul regarding the Agriculture and Natural Resources (ANR) Program states that the GOTG commits to carrying out a parks revenue and budgetary requirement study as one of three studies required to meet the terms of Conditionality nos. 7 and 9. This study and two others in the forestry and livestock sectors are included in the list of studies and activities in the Policy Analysis Agenda to be conducted over the next two years.

The agreement states that the GOTG commits to studying the following topics for each of the three studies:

- Present and projected revenue flows
- Options for retention of a portion of revenues by the resource-generating sector (including line agencies, independent boards, area councils and communities

The three studies will occur within the context of other GOTG and ANR initiatives and are part of the process of detailing a strategy for the Natural Resources Management Program of the GEAP, prioritizing interventions, and developing a five-year action plan. Personnel requirements and operational expenditures will also be addressed in the action plan.

B. Objective

The results of the three studies will underpin the policy measures to be undertaken to meet the July 1994 deadline for Conditionality nos. 8 and 9. The objective of this study, therefore, is to provide adequate information to enable the GOTG to make informed choices about fee levels, collection mechanisms and revenue distribution.

C. Scope of Work

A preliminary scope of work for the parks revenue study was included in ANR Report 90-001, entitled "Report on Meeting the Second Tranche - ANR Program Policy Reforms." The revised version reflects developments which have occurred in the intervening period which have yielded additional data for the Department of Wildlife Conservation.

The study, to be conducted by a team of expatriate and GOTG experts, will be comprised of four principal components:

1. Problem Statement and Key Issues

A more complete and structured presentation needs to be made of the issues discussed in Section 4.1 on pages 9-11 of ANR Report 93-001. All six parks in the Gambia should be covered with priority given to Abuko, Tanji, Kiang, and the Bolong Wetland Reserve. Due consideration shall be given to data and information generated to date on these parks. In addition to key issues identified by the team, the study should also examine:

- Issues and opportunities in community-or co-managed parks and resource implications for the Wildlife Department and the potential role of community resource grant agreements to be developed through the ANR grants component;

- The need for, and means of, developing or improving park infrastructures e.g. trails, tracks, bridges, photo hides, picnic areas, etc; and in-country training needs and opportunities for the Department of Wildlife in collaboration with other MNR departments, especially the Forestry Department. A summary of the methodology and main data sources used in carrying out this study should be included.

2. Park Revenue Flows

2.1 Brief Analysis of the Current and Potential Tourist Market

This section should incorporate the findings of the recently-completed market survey implemented through PBS.

2.2 Revenue Flow and Revenue Potentials

The team shall consider and recommend alternatives for:

- Covering recurrent costs of the parks from revenues generated;
- Increasing the number of visitors to the parks;
- Increasing the revenues per visitor including, but not limited to, higher park entrance fees;
- Increasing the visibility of the parks within the tourist community both overseas and within The Gambia via tour operators, travel agencies, hotels and the GOTG Ministry of Tourism and Information.
- Improving the safety and attractiveness of the parks through improved park management infrastructure, information packages, and services and facilities at tourist destinations.

2.3 Potential for Community-and/or Co-Managed Parks

The study will examine options for retaining revenues generated by the parks in the communities.

3. Budgetary Requirements and Revenue Distribution

3.1 Personnel and Operational Budgetary Requirements

The team shall draw on the following data sources:

- The GEAP and its updates from the National Environmental Agency (NEA).
- Budgetary information from the PBS for MNR, NEA and MOA and close coordination with PBS within the Ministry of Finance.
- Detailed interviews and discussions with the Department of Wildlife Conservation and other related agencies involved in implementing parks-and wildlife-related components of the GEAP.
- The ANR Project itself.

With these and additional sources of information which may be identified during the course of the study, the team shall provide "base case," "high" and "low" estimates for:

- Personnel requirements by category and discipline.
- Budgetary requirements on an annual basis for the next five years for personnel and operations to implement the parks program.

3.3 Distribution of Current and Potential Park Sector Revenues

This section will include a detailed analysis of the PBS database of:

- Current revenue levels, distribution and uses.
- Projected total revenue levels under alternative scenarios.
- Analysis of the principal issues in the distribution of total revenues in light of the issues discussed in Section 4.1 of ANR Report 90-001.
- Specific and detailed analysis comparing Department of Wildlife Conservation personnel and operational budgetary requirements to implement the GEAP with potential revenue flows to the Department.

3.4 Cost-Sharing and TA Requirements for Community-and/or Co-Managed Parks

4. Conclusions and Recommendations

This section will summarize the overall conclusions and recommendations of the study report. The recommendations shall specify options for policy choices to be made by the GOTG by July 1994 in accordance with Conditionalities 8 and 9.

ANNEX B
DOCUMENTARY SOURCES

Training Needs Assessment, ANR/TD/94/003.

An Assessment of Ecotourism Associated with Bao Bolong and Kiang West National Park in The Gambia (USAID), December 1993.

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ANNEX C
LIST OF INDIVIDUALS CONSULTED OR INTERVIEWED

I. Government of the Gambia

Hon. Alkali J. Gaye	-	Minister of Information and Tourism.
Hon. Omar Jallow	-	Minister of Agriculture.
Ebraima Manneh	-	Permanent Secretary, Min of Information and Tourism.
Suleyman Samba	-	Deputy Permanent Secretary, Ministry of Natural Resources.
Cherno O. Joof	-	Principal Assistant Secretary, Ministry of Natural Resources.
Dr. Almamy Camara	-	Director, DWCM
Sirra Ndow	-	Senior Planner, Ministry of National Resources.
Alkali Conteh	-	Acting Director, National Tourism Office

II. USAID

Gary Cohen	-	Agriculture Development Officer
Christina Elias	-	PCR, ANR Project Coordinator.

III. ANR Project

Dr. Amare Getahun	-	Chief of Party
JoAnne Yeager Sallah	-	Grants Administrator
Frank Kooistra	-	PBS
Malcolm Marks	-	EIS

IV. Private Sector

Sojo Tourey	-	Owner and manager, Tendaba Camp
Andy Plews	-	Director, Gold Stag Public Relations Ltd. UK (Representatives for Gambia Hotel Association).
Carol Jones	-	Kololi Beach Hotel
Francisco Montoya	-	Kemoto Hotel
Salvadora Cuso	-	Manager, Kemoto Hotel
Samba M.B. Fye	-	Managing Director, Gamtours.

V. ANR Forestry Revenue Study Consultants

Kjell Christophersen	-	Team Leader
Peter Lineham	-	University of Maine

VI. Others

Janet Carter	-	Wildlife biologist
Charles Hamilton	-	Parks Management Specialist (Kiang West N.P.) US Peace Corps
Kevin Conners	-	Environmental Education Specialist (Kiang West N.P.) US Peace Corps
Almami Kassama	-	Environmental Education Specialist
Almami Sanyang	-	Ornithologist, Kiang West N.P.

VII. Village Communities

JALI

Mr. Drammea	-	The Alkalo (Village Head)
Tonghonding Dibba		
Mbemba Samateh	-	Villagem Development Committee Member.
Mrs. Sanyang	-	The Alkalo (Village Head)

Kunte Kunda, Sukotou

Alhaji Arfang Sainey Conteh	-	Alkalo
Mama Conteh	-	Women Group Leader (Bao Bolong Rice Fields)

ANNEX D

Operational Budgetary Requirements for Six National Parks/Nature Reserves and the DWCM

Table D.1: Operational Budgetary Requirements for Abuko Nature Reserve

Item	Grade	No.	Cost in Dalasis		
			1995/96	1996/97	1997/98
STAFF					
Warden	6	1	10,896		
Assistant Warden	4	1	7,368		
Senior Ranger	3	2	11,132		
Ranger I	2	4	18,576		
Ranger II	1	6	24,264		
Revenue Collector		2	16,200		
Daily Paid Labor		6	36,420		
Sub-Total		**22**	**124,856**	**131,099**	**137,654**
EQUIPMENT					
Vehicle		1	190,000	28,500	29,925
Bicycles (Pool)		10	6,000	6,000	4,000
Radio (Communication)		6	200,000	--	--
Sub-Total			**396,000**	**34,500**	**33,925**
DEVELOPMENT					
Repairs of Educ. Center			100,000	15,000	15,750
Visitor Center			80,000	12,000	12,600
Improvement of photo hides		5	10,000	10,000	10,500
Improvement of toilets			10,000	10,000	10,500
Improvement of kiosks			10,000	-	-
Provision of water to pools (extension)			-	50,000	50,000
Repair of animal cages			200,000	200,000	200,000
Repair/development of trails & fire breaks			10,000	10,000	10,000
Sub-Total			**420,000**	**307,000**	**309,350**
OTHERS					
Feeding of animals			50,000	50,000	52,500
Administration (Equipment & Stationery)			10,000	5,000	5,250
First Aid Kit			2,000	2,000	2,000
Sub-Total			**62,000**	**57,000**	**59,750**
TOTAL			**1,002,856**	**529,599**	**540,679**

Table D.2: Operational Budgetary Requirements for Tanji Nature Reserve

	Grade	No.	Cost in Dalasis		
			1995/96	1996/97	1997/98
STAFF					
Warden	6	1	10,896		
Assistant Warden	4	1	7,368		
Senior Wildlife Ranger	3	1	5,566		
Wildlife Ranger I	2	2	9,288		
Wildlife Ranger II	1	2	8,088		
Daily Labor	-	4	30,272		
Sub-Total		**11**	**71,478**	**75,052**	**78,805**
EQUIPMENT					
Vehicle (P.U.)		1	190,000		
Boat + motor (for control)		1	20,000		
Bicycles		8	12,000		
Radio (Communication)		3	DWCM	To supply	-
Solar Energy		1	-	200,000	-
Office Equipment			10,000	1,500	1,575
Sub-Total			**232,000**	**232,000**	**36,165**
DEVELOPMENT					
Completion of office			15,000	2,250	2,250
Construction of Visitor Center			-	80,000	12,000
Construction of hides			-	10,000	-
Construction of toilet			10,000	1,500	1,500
Construction of trails			5,000	1,000	1,000
Construction of fire breaks			15,000	5,000	5,000
Sub-Total			**45,000**	**99,750**	**21,750**
ADMINISTRATION					
Stationery			1,000	1,150	1,322
First Aid Kit			1,000	1,000	1,000
			2,000	**2,150**	**2,322**
TOTAL			**350,478**	**412,952**	**139,042**

Table D.3: Operational Budgetary Requirements for Kiang West National Park

	Grade	Number	COST IN DALASIS		
			1995/96	1996/97	1997/98
PERSONNEL					
Park/Warden	6	1 (on site)	10,896		
Warden-Education	6	1 (" ")	10,896		
Assistant Warden	4	1	7,368		
Senior Wildlife Ranger	3	3	16,698		
Wildlife Ranger I	2	8	37,152		
Wildlife Ranger II	1	10	40,440		
Daily Labor	-	6	42,504		
Sub-Total		**30**	**165,954**	**174,252**	**182,964**
EQUIPMENT & INFRASTRUCTURE					
			-	-	-
Vehicle (P.U.) - Management		1 Available	x	-	-
Radio (Communication)		8	x	-	-
Motorcycles		5 Ordered	-	-	-
Vehicle - Education		1 Available	-	-	-
Boat + motor		1 Purchased	x	-	-
7-10 T Truck		1 Ordered	x	-	-
Tractor + Trailer + Water bowser		1 Ordered	x	-	-
Grader		1 Ordered	x	-	-
Mopeds		5 Ordered	x	-	-
Generator (Unit)		1 Ordered	x	-	-
Construction of HQ			x	-	-
Construction Educ. & Visitor Center		Funded	-	-	-
Guard Post (Tubab Kolon, Jali,		Funded		x	-
Dumbuto, Kulikunda & Banjana)			x	-	-
Equipment for HQ		Ordered	-	-	-
Audio-visual equipment		Available	x	x	-
Construction trails & roads		Funded	-	-	-
Construction fire breaks		Funded	-	-	-
Demarcation		Funded			
TOTAL			**165,954**	**174,252**	**182,964**

Table D.4: Operational Budgetary Requirements for Bao Bolong Nature Reserve

	Grade	No.	Cost in Dalasis		
			1995/96	1996/97	1997/98
STAFF					
Warden	6	1	10,896		
Senior Wildlife Ranger	3	1	5,566		
Wildlife Ranger I	2	2	11,066		
Wildlife Ranger II	1	2	-		
Assistant Warden	-	2	14,168		
Daily Labor	4	1	-		
Sub-Total		9	**41,696**	**43,780**	**45,970**
EQUIPMENT					
Vehicle (P.U.)		1	190,000	28,500	28,500
Outboard boat		1	20,000	4,200	4,200
Mopeds		3	-	24,000	3,600
Radio (Mobile) 1 (Hand set) 1		2	DWCM To	DWCM To	
Solar Energy		1	Supply	Supply	200,000
Sub-Total			-	-	
			210,000	**56,700**	**236,300**
DEVELOPMENT					
Boundary survey			-	150,000	-
Inventories			25,000	25,000	25,000
Construction of office & Education Center			-	-	180,000
Sub-Total			**25,000**	**175,000**	**205,000**
ADMINISTRATION					
Temporary HQ at Illiasa (Hire)			12,000	12,000	12,000
Sub-Total			**12,000**	**12,000**	**12,000**
TOTAL			**288,696**	**287,480**	**499,270**

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Table D.5: Operational Budgetary Requirements for Niumi National Park

	Grade	No.	Cost in Dalasis		
			1995/96	1996/97	1997/98
STAFF					
Warden	6	1	10,896		
Assistant Warden (Educ.)	4	1	7,368		
Assistant Warden (Management)	4	1	7,368		
Senior Wildlife Ranger	3	2	11,132		
Wildlife Ranger I	2	2	9,288		
Wildlife Ranger II	1	4	16,178		
Daily Labor		4	28,336		
		15	**90,566**	**95,094**	**99,849**
EQUIPMENT					
Vehicle (P.U.)		1	190,000	28,500	28,500
Outboard boat		1	20,200	3,000	3,000
Radios (Communication)		2			
(1 base, 1 vehicle)			DCM To	DCM To	93,000
Office equipment		-	Supply	Supply	2,000
Solar energy		-	2,000	2,000	-
			-	-	
			212,200	**33,500**	**126,500**
DEVELOPMENT					
Boundary survey			-	200,000	-
Construction of HQ-office			-	80,000	-
Construction of Visitors Center			-	-	80,000
Construction of hides			80,000	-	-
Plant and animal studies			40,000	40,000	-
			140,000	**320,000**	**80,000**
ADMINISTRATION					
General management support			5,000	5,000	5,000
			5,000	**5,000**	**5,000**
TOTAL			**447,766**	**453,594**	**311,349**

Table D.6: Operational Budgetary Requirements for River Gambia National Park/Baboon Island

	Grade	No.	Cost in Dalasis		
			1995/96	1996/97	1997/98
STAFF					
Warden	6	1	10,896		
Assist. Warden (Educ.)	4	1	7,368		
Senior Wildlife Ranger	3	1	5,566		
Wildlife Ranger I	2	2	9,288		
Wildlife Ranger II	1	2	8,088		
Daily Labor		3	21,252		
		10	**62,458**	**65,581**	**68,860**
EQUIPMENT					
Vehicle (4-wheel drive)		1	190,000	28,500	28,500
Outboard boat (available)		1	-	3,000	3,000
Mopeds		2	-	8,625	10,238
Bicycles		4	-	6,000	1,000
Radio (Communications)		2	See DWCM		
Equipment for HQ. (available)			Chimpanzee	Rehabilitation	Project
Solar energy				100,000	5,000
			190,000	**146,125**	**47,738**
DEVELOPMENT					
Park Headquarters			Chimpanzee	Rehabilitation	Project HQ.
Educ. & Visitor Center					80,000
River landing sites				25,000	25,000
				25,000	**105,000**
ADMINISTRATION					
Supplies			1,000	1,000	1,000
First Aid Kit			1,000	1,000	1,000
			2,000	**2,000**	**2,000**
TOTAL			**254,458**	**238,706**	**221,598**

Table D.7: Operational Budgetary Requirements for DWCM

			Cost in Dalasis		
			1995/96	1996/97	1997/98
STAFF					
Director	10	1	48,021		
Deputy Director	10	2	22,723		
Senior Wildlife Cons. Officer	9	1	22,200		
Wildlife Cons. Officer	8	1	18,768		
Assist. Wildlife Cons. Officer	7	1	15,516		
Accounts Clerk		1	13,836		
Typist		2	16,368		
Drivers		2	15,432		
Day Watchman		1	6,804		
Night Watchman		2	13,848		
Cleaner		1	7,416		
Daily Paid Labor		2	11,240		
		16	**212,172**	**222,781**	**233,920**
EQUIPMENT FOR HQ & PARKS					
Vehicle (P.U.) HQ		2	190,000	28,500	237,500
Computers HQ		2	27,500	27,500	-
Radio communication equipment		-	200,000	10,000	10,500
Weapons (surveillance & protection)		60	-	200,000	
					10,500
			417,500	**266,000**	
					258,500
MISCELLANEOUS					
Uniforms and accessories		120	40,000	-	42,000
Veterinary drugs		pairs	15,000	15,000	15,000
Production of brochures			20,000	20,000	20,000
Management seminars 1-2 years			10,000	10,000	10,000
Weapons training			10,000	10,000	10,000
			95,000	**55,000**	**97,000**
TOTAL			**724,672**	**543,781**	**589,420**