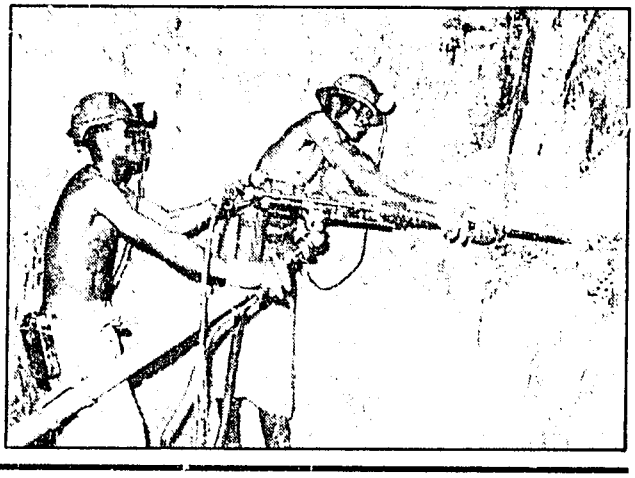
PN-ABC-227

TOURISM

SOUTHERN AFRICAN DEVELOPMENT COORDINATION CONFERENCE



Lusaka, Republic of Zambia
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L E G E N D

ADB = African Development Bank
AGIP Spa= AGIP Spa
AIDAB = Australian International Development Aid Bureau
ANG = Angola
AUS = Australia
AUSt = Austria
BADEA = Arab Bank for Economic Development in Africa
BEL = Belgium
BOT = Botswana
BRA = Brazil
CAN = Canada
CBI = Confederation of British Industries
CFTC = Commonwealth Fund for Technical Cooperation
CHI = Peoples Republic of China (China)
CITES = Convention on International Trade in Endangered Species
DEN = Denmark
EEC = Commission of the European Communities
FAO = Food and Agriculture Organisation of the United Nations
FIN = Finland
FRA = France
FRG = Federal Republic of Germany
GDR = German Democratic Republic
IBRD = International Bank for Reconstruction and Development
ICAO = International Civil Aviation Organisation
ICE = Iceland
IDA = International Development Agency
IDRC = International Development Research Centre
IDU = Industrial Development Unit of the Commonwealth Secretariat
IFAD = International Fund for Agricultural Development
ILO = International Labour Organisation
IMPOD = Import Promotion Office for Products from Developing Countries
IRE = Ireland
ISNAR = International Service for National Agricultural Research
ITA = Italy
ITB = International Tourism Board
ITU = International Telecommunications Union
JAP = Japan
KUW = Kuwait Fund
LES = Lesotho
MAL = Malawi
MOZ = Mozambique
NET = Netherlands
NOR = Norway
NORDICs = Nordic Countries
OPEC = Organisation of Petroleum Exporting Countries
POR = Portugal
SADCC = Southern African Development Coordination Conference
SAFTTA = Southern African Federation of Travel and Tour Associations
SAREC = Swedish Agency for Research Cooperation with Developing Countries
SATEP = ILO Southern African Team for Employment Promotion
SPA = Spain
SWA = Swaziland
SWE = Sweden
SWI = Switzerland
TAN = Tanzania
TAZARA = Tanzania Zambia Railway Authority
UAPTA = Unit of Account of the Preferential Trade Area
UK = United Kingdom
UNDP = United Nations Development Programme
UNIDO = United Nations Industrial Development Organisation
UNSPEC'd= Unspecified
USA = United States of America
USSR = Union of the Soviet Socialist Republics
WB = World Bank
ZAM = Zambia
ZIM = Zimbabwe

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1. EXECUTIVE SUMMARY

1.1 Tourism has a great potential to contribute to the development of the economies of SADCC member States, and to foreign exchange earnings. The region's sunny climates, sandy beaches, panoramic landscapes, rich wildlife and exotic cultures attract a stream of visitors from around the world every year. It is estimated that member States earn about US$225 million in foreign exchange every year from tourism. There is scope for increasing these earnings to US$300 million a year.

1.2 The Tourism Sector's overriding priority is to maximise market share of both Sub-Sahara African visitors and international travellers. To achieve this goal, the sector has defined the following key objectives:

- to offer a much more diversified regional product;
- to pool resources and improve standards of industry training, tourism statistics, hotel and tour operator standards;
- to localise key elements of the distributive function;
- cooperation in the promotional arena, leading to achievement of significant economies of scale in resource allocation, and greater integration of the region in the eyes of the travel trade and of the travelling public.

1.3 A number of projects are at various stages of implementation. Market research in North America has started, and the same is planned for Europe and Asisa. Efforts are underway to register tour operators in the region. And consultations are underway with interested cooperating partners to finance the production of a master regional brochure, audio-visual aids and display materials.

1.4 To promote tourism, SADCC countries participated in trade fairs in Montreux (October 1988), Amsterdam (December 1988), Berlin and Gothenburg (April 1989).

1.5 Preparatory work has been initiated on an assessment of manpower requirements of the Sector, with a view to mounting training activities. In addition, a workshop is to be organised for tourism officials, to familiarise them with essential techniques of tourism

planning and development. Plans are also in hand to standardise, harmonise and improve tourism statistics throughout the region.

1.6 The Sector is about to embark upon the classification of all hotels and tourism plant in the region. Finally, the regional tourism demand study has identified the tourism facilities which need rehabilitation and up-grading.

1.7 The programme of the Tourism Sector has, thus far, evolved on a project by project basis. This approach has resulted in a set of projects which did not closely reflect the strategic priorities of the Sector. It has, therefore, become necessary to adopt a sectoral planning approach. Hence, it has been decided to commission consultants to undertake a comprehensive review of the Sector, and to recommend a long-term development strategy. This strategy will form the basis for formulating a coordinated regional tourism development programme.

2. REVIEW OF THE REGIONAL SITUATION

2.1 Tourism is one of the fastest growing industries in the world. According to the World Tourism Organisation, international tourism receipts in 1982, (excluding international fare receipts) totalled US$98.6 billion. By 1987[3], the value of tourism receipts had risen to US$150.0 billion - a 52 percent increase over 1982[3]. If expenditure on air fares, and by domestic tourists are taken into account, the world-wide industry probably earns about US$400 billion a year.

2.2 International tourist arrivals reached 355 million in 1987, up 24 percent from 1982. The main tourism markets are Europe, North America and Japan. Unlike other industries, which are characterised by large-scale operations, the tourism industry has a sustantial number of small-scale enterprises, which makes it especially suited for developing countries.

2.3 The industry has grown in size and complexity. While contributing to national economies and international understanding, it is fraught with the risk of negative impacts on local culture and the environment, if it develops in an uncontrolled manner. It is susceptible to the volatility of the world economy. Coordinated development can facilitate product diversification, multi-destination tour planning and economies of scale in marketing, research and training.

2.4 The resource base for tourism development in the SADCC region consists of such natural attractions as the pleasant climate; sandy beaches of Angola and Mozambique; wildlife of Botswana, Mozambique, Tanzania, Zambia and Zimbabwe; the Okavango Delta of Botswana; Mount Kilimanjaro of Tanzania; the Victoria Falls of Zambia/Zimbabwe; the mountain areas of Lesotho; and, the traditional villages in Swaziland. This natural endowment is complemented by a rich historical and cultural heritage, such as the Great Zimbabwe, etc.

2.5 Within the region, there are some 480 hotel units with a total of 19,500 rooms and 35,700 beds. This infrastructure yields 13 million bed-nights per year, of which 2.25 million are utilized by 225,000 foreign visitors per year. Occupancy rates vary widely between and within member States.

2.6 The principal means of transportation for long-haul tourism is the aircraft. SADCC carriers handle 43 percent of the total weekly non-regional traffic. The rest is handled by foreign carriers. Surface transportation within the region varies considerably. Road and rail services are available in most member States; however, cross-border surface transportation and coastal services are rather limited.

2.7 Firms with capacity to handle clients on guided tours exist in most of the member States. They tend to be small, specialized, private operators, or large parastatal or private enterprises.

2.8 The availability of amenities varies widely, depending on each member State's stage of development. For example, national parks are well developed in Botswana, Malawi, Tanzania, Zambia and Zimbabwe, but much less so in the other member States. Services are limited, with restaurants concentrated in major centres. Entertainment is of varying quality; however, the major tourist centres are generally well served.

2.9 Tourism administration is primarily a state responsibility, involving government ministries at the policy and regulatory level, and tourism organizations (boards or corporations) responsible for promotion and development. The private sector is organized into Hotel and Restaurants Associations and, to a lesser extent, Travel Agents and Tour Operators Associations.

2.10 The Tourism Enterprise Sector of the region has constituted itself into a federation of tourism associations - the Southern African Federation of

Travel and Tourism Associations (SAFTTA), which will constitute the contact point for cooperation between SADCC governments and SADCC itself, on the one hand, and the regional enterprise community, on the other.

2.11 International marketing within the region is under-developed, with most firms selling directly to international outlets and few incoming wholesalers. Wholesalers play an important role for overseas business partners who prefer working through a single contact point, to dealing with a number of different hotels and ground operators.

2.12 The international marketing of SADCC tourism is through a network of wholesale tour operators, primarily on a national basis. In some cases, SADCC member States' tourism is packaged jointly with that of South Africa, which is undesirable. Overseas marketing is coordinated by national tourism offices based in diplomatic missions. Tanzania, Zambia and Zimbabwe make fairly effective use of this network.

2.13 Typically, consumers of SADCC tourism are married, professional and managerial people, travelling without children. Most (75 percent) are over 45 years of age. These categories of tourists usually have high discretionary incomes. The market is, however, volatile, since the tourists move from one destination to another, demanding high standards of service and quality. Their preference is for individual travel or small, exclusive and highly personalized groups.

3. PROGRAMME REVIEW

3.1 Recognizing the actual and potential contribution of tourism to the development of the region, the Tourism Sector has set the following objectives:

* diversification of exports and maximization of net foreign exchange earnings;

* stimulation of rural development through infrastructural development, employment creation and income generation;

* generation of revenue for governments, enterprises and individuals;

* conservation of tourist attractions, and to avoid social, cultural and environmental degradation, as well as foreign exchange leakage;

* provision of recreational facilities;

* enhance local control of tourist operations;

* promote maximum use of local materials in construction and tourist operations; and

* projection of a positive image of the region and its people to the outside world, and nurturing of a regional consciousness among the people of the region as a means of fostering understanding and cooperation.

3.2 The strategy for achieving these objectives emphasizes:

* rehabilitation of existing, and development of new tourism infrastructure and superstructure;

* development of the distributive sector, which deals with the packaging of multi-destination and regional tours;

* production of materials for tourism marketing;

* training of professional and skilled personnel;

* improvement of air transportation; and

* facilitation of immigration procedures and customs clearance.

3.3 The SADCC Tourism Development Programme is market-oriented, i.e. it is designed to provide a product which meets the specific demands of the various markets.

3.4 The benefits of tourism development may be summarized as follows:

a) <u>Foreign Exchange Earnings</u>

SADCC member States earn about US$225 million a year from tourism. There is scope, however, for raising this figure to US$300 million a year over the next five years. Part of the earnings flow out of the region in the form of loan repayments, fees on management contracts and luxury imports.

An important consideration should be to maximize net foreign exchange earnings.

b) Environment

Protection of indigenous culture and the environment must be incorporated into tourism planning. By utilizing the natural, historical and cultural heritage of the region, tourism can contribute to their preservation and conservation. Uncontrolled tourism can cause environmental degradation.

c) Human Relations

Tourism provides opportunities for interaction between peoples from various parts of the world, with different social and cultural values. These contacts facilitate mutual understanding and foster better human relations.

d) Rural Development

Tourist attractions are often located in areas of limited alternative use. The introduction of tourist facilities (hotels, ground operators, etc.) can stimulate broad-based development of these areas by creating demand for supporting infrastructure and other services, generating employment and injecting incomes into these areas.

3.5 Broadly, the Tourism Development Programme comprises four components:

- Tourism Product Development;
- Tourism Research and Marketing;
- Tourism Services; and
- Manpower Development and Training.

3.5.1 Tourism Product Development takes the form of rehabilitation and further development of the tourism plant. In the sectoral strategy due to be formulated, a programme for the upgrading, rehabilitation and expansion of tourism plant, and infrastructure will be given both top priority and maximum urgency. It is envisaged that the projects arising from this exercise will attract support from the international cooperating partners, and equity participation from both the regional and international enterprise sector.

3.5.2 Market research is intended to assess the size and potential of tourism markets in Europe, North America, Asia and the SADCC region. A study of the European market was completed in 1986, and its recommendations have been incorporated into the Programme. With the assistance of the Commonwealth Secretariat, a study of the North American market was commissioned in 1988, and is currently in progress. At the regional level, the Sector is undertaking a study, in collaboration with the Preferential Trade Area (PTA), designed to identify constraints to intra-regional travel and to recommend remedial action. The Soviet authorities have been requested to finance and carry out a market study in Eastern Europe, but no positive response has been received, so far, from them.

3.5.3 Tourism Marketing focuses on trade fairs and other exhibitions, production of promotional materials (brochures, audio-visual aids and display material), and market research. In Europe, SADCC has participated in trade fairs in Amsterdam, Gothenburg, Montreux and Berlin.

3.5.4 Tourism Services cover standardization of the grading of tourism facilities; standardization of regional tourism statistics; creation of a network of SADCC tour operators, through registration and accreditation; and mobilization of the tourism enterprise community to participate effectively in regional tourism development through the Southern African Federation of Travel and Tourism Associations. To ensure uniformity of standards throughout the region, the Sector has prepared a project aimed at achieving uniform hotel and tourism plant grading standards in all member States. The project is being implemented by the World Tourism Organization (WTO), with the support of the United Nations Development Programme (UNDP).

3.5.5 Manpower Development and Training encompass assessment of skilled manpower requirements in the industry, expansion and up-grading of training facilities in the region, and organization of training programmes to meet the requirements. With the assistance of the German Association for Technical Cooperation (GTZ), the Sector has commissioned a manpower survey to assess future requirements in the industry.

4. CURRENT STATUS OF PROJECTS

a) Tourism Marketing

Project 1.0.1: Internal Distribution Network

The objective of this project is to set up an efficient network of incoming wholesalers to programme and package comprehensive regional multi-destination tours, to sell these internationally and regionally, and to handle incoming passenger flows. The following activities will be undertaken in implementing this project:

- Identification of suitable incoming Wholesalers, based on distribution of offices, regional experience and international exposure and contacts.
- Identification of suitable national offices for combining into regional co-operative selling organisations.
- Identification of weaknesses in the distributive sector in member States and design and implement technical assistance programmes.
- Communicating with selected operators and drafting plan of operation.
- Inspection of selected tourism products, within the region and the Indian Ocean.
- Drafting of tour programmes and itineraries and costing.
- Production of brochures.
- Marketing and selling of tours

Because of the multiplicity of destinations and individual products available within the region, it will be advantageous to approach international out-going operators with a choice of programmes offered by regional in-coming operators. This network will also serve as a distribution network for developing intra-regional tourism.

Initial product research has been carried out and guidelines for the registration of tour operators have been circulated to member States for comments.

Registration is expected to start as soon as the member States submit the list of tour operators.

Project 1.0.2: Promotional Resources Base Development

Effective marketing requires effective communication of the facts and the image of the product in question. This requires - more than in any other industry - a good range of effective, informative, printed and audiovisual material. Display material is required for decoration of stands and booths at trade shows and for Point of Sale (POS) displays.

This project aims to provide and distribute the necessary printed, audiovisual and display material required for effective marketing, and to set up and run an annual tourism market workshop for joint promotion of the regional product to international and local travel industry professionals.

The project will also assess the viability of operating SADCC Tourism Offices in important market areas.

Interested cooperating partners have been approached to fund the production of a regional master brochure, procurement of audio-visual materials and advertisements.

With the establishment of Southern African Federation of Travel and Tour Associations (SAFTTA), it is envisaged that the project will ultimately be implemented through funds made available from the regional travel and tourism enterprise sector.

Project 1.0.3: Tourism Marketing in Europe

Europe, and the former colonial powers of the United Kingdom and Portugal, in particular, have been a traditional source of overseas visitors to the region. A large proportion of these have been visiting friends and relatives (VFRs), while others have traditionally combined member States with South Africa and (to a lesser extent) Kenya; as part of group or individual package tours. Tanzania, Zambia and Zimbabwe have engaged in serious marketing in continental Europe as well as in the UK. It is now necessary to diversify market segments both geographically and structurally and to put an exclusively SADCC product on the market, omitting South Africa, which is both politically and commercially a liability.

The project will utilise the Promotional Resources Base and the International Distribution Network as the basic tools for promoting and selling the regional Tourism product. Various micro projects are in hand or under consideration.

Various micro-projects are in hand or under consideration:

FRG: Supporting the participation of the Tourism Sector of member States in Berlin Travel Fair (ITB), and the financing of brochure production. Under negotiation with GTZ.

Netherlands: Participation on a communal stand by SADCC States at Tour, (Amsterdam Travel-Trade only event) financed since 1986 by CBI-Netherlands.

Scandinavia: Joint participation at TUR - Swedish Holiday and Travel Fair - Gothenburg. Financed by IMPOD.

Scandinavia workshops, market development and advertising and public relations; under negotiation in terms of Nordic/SADCC Initiative, and hope to conclude them in April 1990.

Switzerland: Joint Stand for SADCC States at Travel Trade Workshop - Montreux (Swiss professional - only travel fair).

Project 1.0.4: Intra-Regional Tourism Marketing

Intra-regional tourism marketing is not only a commercial necessity to increase revenue in the tourism industry in SADCC, but should also be seen in the light of the generally accepted democratic right of all sections of the population to take holidays. The promotion of travel within the region will increase understanding and cooperation, among the citizens of the region.

The aims of this project are:

- to assess the size, potential and needs of the traditional (middle - high incomes) travelling public in the region;

- to assess the needs and requirements of lower-income groups for holiday travel;

- to identify means of communicating and distributing the tourism product of the region to differing segments of the population; and

- to identify product requirements and price levels appropriate to regional needs.

The impact of the introduction of the PTA UAPTA Travellers cheques will also be assessed.

The project focusses on all aspects of Tourism in the Eastern and Southern African region, and will be implemented in cooperation with the PTA. The project cost is estimated at US$0.4 million.

Project 1.0.5(1): North American and Pacific Rim Market Research

Project 1.0.5(2): Scandinavian Market Research

Project 1.0.5(3): Eastern Europe Market Research

The objective of these projects is to assess the potential to attract visitors from these three areas to the SADCC region. The Commonwealth Secretariat has funded the North America Research component initially. The Research work by a Canadian consultancy firm, Legault Crysoles et Associes, has started.

(b) Tourism Product Development

Project 2.0.1: Product Development

The objectives of this project are:

- to identify the infrastructure required for tourism development and estimate costs;

- to select projects from national master plans to be included in the regional plan and re-appraisal of these projects;

- to commission feasibility studies on projects agreed upon with member States, in the order of priority.

Specific tourism products that need rehabilitation and up-grading in various SADCC States are being identified.

(c) **Tourism Services**

Project 3.0.1: Classification of Hotels and Tourism Plant

Tourists rely on brochures and other persuasive data sources to make their choice. A grading system introduces an objective element into the decision making process, thus reducing the element of chance and possible disappointment. This encourages consumers and assures customer satisfaction.

The objectives of the project are:

- to design and implement a standard grading/classification system for hotels, other accommodation establishments, and ground operators;

- to achieve uniformity of standards throughout the region; and

- to ensure high standards and relevant value-for-money at all tourism plant in operation.

US$0.1 million has been secured from UNDP, and WTO is carrying out the project.

Project 3.0.2: Harmonization and Standardization of Tourism Statistics

Tourism statistics are currently inadequate owing to various constraints in the collection and processing of data, and to varying methodologies in use. Accurate and reliable statistics are needed for analysis of current and on-going programmes, and for future planning.

This project aims to design and implement systems for collecting and analyzing frontier arrival figures for visitors, hotel arrivals and occupancy, for a statistical analysis system; and guidelines on the collection and analysis of tourism statistics for the region.

World Tourism Organization (WTO) has assisted the Sector in the development of statistics guidelines, and will execute this project. Funding has been secured from UNDP.

1.0.2 PROMOTIONAL RESOURCE BASE DEVELOPMENT

Estimated cost:	Financing gap: US$0.48m
Total : US$0.48m Foreign : US$0.48m Local	Executing Agency:
Funding secured:	Start:
Foreign : Local :	Duration:

Objective: To produce and distribute the printed Tourism Promotional Materials such as the audio-visual and display materials to be used for effective marketing and to set up and run annual tourism market workshop with a view to selling the regional products to international and local travel industry professionals.

Description: Effective marketing of tourism requires effective promotion and communication of the facts and the image of the products in question more than in any other industry. A good range of effective informative printed and audio-visual materials is essential in the promotion of the industry. It is envisaged that SAPTTA will be involved significantly in the implementation of this project.

The specific tasks to be undertaken in this project are:

1. Production of printed material such as brochures, agents manual, regional map and hotel and tour operator guide.
2. Audio-visual materials.
3. Display materials (poster series) and display units and
4. Newsletter.

Status: Funding sought.

1.0.3 TOURISM MARKETING IN EUROPE

Estimated cost:		Financing gap:
Total	: US$8.65m	US$7.45m
Foreign	: US$8.65m	Executing Agency:
Local	:	CBI Netherlands IMPOD Sweden
Funding secured:		Start:
Foreign	: US$1.20m (CBI/IMPOD)	
Local	:	Duration:

Objective: To maximise SADCC Tourism Market share in Europe and to diversify market operations and segments, as well as the establishment of SADCC Tourism Promotion Office in Europe.

Description: Europe, and the former colonial powers of the United Kingdom and Portugal, in particular, have been a traditional source of overseas visitors to the region. A large proportion of these have been visiting friends and relatives (VFRs), while others have traditionally combined member States with South Africa and (to a lesser extent) Kenya; as part of group or individual package tours. Tanzania, Zambia and Zimbabwe have engaged in serious marketing in continental Europe as well as the U.K. It is now necessary to diversify market segments both geographically and structurally and to put an exclusively SADCC product on the European market, omitting South Africa, which is both politically and commercially a liability.

The project will utilise the Promotional Resources Base and the International Distribution Network as the basic tools for promoting and selling the regional Tourism product.

Various micro-projects are in hand or under consideration:

FRG: Supporting the Tourism Sector participation of member States in ITB trade fairs and the financing of brochure production (Berlin Travel Fair). Under negotiation with GTZ.

Netherlands: Participation on a communal stand by SADCC States at Tour, (Amsterdam Travel-Trade only event) financed since 1986 by CBI-Netherlands.

Scandinavia: Joint participation at TUR - Swedish Holiday and Travel Fair - Gothenburg. Financed by IMPOD.

Scandinavia workshops, market development and advertising and public relations; under negotiation in terms of Nordic/SADCC Initiative and hope to conclude them in April 1990.

Switzerland: Joint Stand for SADCC States at Travel Trade Workshop - Montreux (Swiss professional - only travel fair). Approaches have been made to the Swiss government through Travel Trade Workshop.

The following are the tasks to be undertaken:

1. Development of a network of regularly attended professional travel trade shows in Europe;

2. Holding of regular promotional workshops and seminars for the travel trade;

3. Distribute regional promotion material;

4. Monitor European market trends; and

5. Establishment of SADCC tourism European promotion office.

Status: Funding secured from IMPOD, Sweden and CBI, Netherlands, for participation by SADCC member States at tourism fairs in Sweden and the Netherlands.

Additional funding being sought for SADCC European Tourism Promotion Office.

1.0.4 INTRA-REGIONAL TOURISM MARKETING AND RESEARCH

Estimated cost:		Financing gap:
		US$0.40m
Total	: US$0.40m	
Foreign	: US$0.40m	Executing Agency:
Local	:	
Funding secured:		Start:
Foreign	: US$1.20m (CBI/IMPOD)	
Local	:	Duration:

Objective: To research and identify the size and potential travel needs of all Sectors of the population in the region with a view to stimulating leisure travel both nationally and regionally.

Description: Intra-regional tourism marketing is not only a commercial necessity to increase revenue in the tourism industry but should also be seen in the light of the generally accepted democratic right of all sections of the population to take holidays. The promotion of travel within the region will increase understanding and cooperation among the citizens of the region.

The aims of this project are:

- to assess the size, potential and needs of the traditional (middle - high incomes) travelling public in the region;
- to assess the needs and requirements of lower-income groups for holiday travel;
- to identify means of communicating and distributing the tourism product of the region to differing segments of the population; and
- to identify product requirements and price levels appropriate to regional needs.

The impact of the introduction of the PTA UAPTA Travellers cheques will also be assessed.

The project focusses on all aspects of Tourism in the Eastern and Southern African region, and will be implemented in cooperation with the PTA.

Status: Funding sought.

1.0.5(1) NORTH AMERICAN AND PACIFIC RIM MARKET RESEARCH
1.0.5(2) SCANDINAVIAN MARKET RESEARCH
1.0.5(3) EASTERN EUROPE MARKET RESEARCH

Estimated cost:

Total : US$0.34m
Foreign : US$0.34m
Local :

Funding secured:

Foreign : US$0.06m (CFTC)
Local :

Financing gap: US$0.28m

Executing Agency: Commonwealth Fund for Technical Cooperation

Start: August, 1989

Duration: 8 weeks

Objectives: The objective of these projects is to assess the potential to attract visitors from these three areas to the SADCC region.

Description: The specific tasks to be undertaken in these projects are:

- analysis of the promotional activities of the SADCC regional tourist marketing;
- research into the potential of setting up multiple destination holidays through packaging of tours that combine all SADCC countries.

Status: The Commonwealth Secretariat has funded the North America Research component initially. The Research work by a Canadian consultancy firm, Legault Crysoles et Associes has started.

Extra resources are being sought.

Project	Project Title	Estimated Cost US$ Million Total	Foreign	Local	Funding Secured & Source US$ Million	Funding under Negotiation US$ Million	Financing Gap US$ Million	Comments/Status
TOURISM								
1.0.1	Internal Distribution Network	0.02	-	0.02	0.02 (SADCC)	-	-	Under implementation.
1.0.2	Promotional Resources Base Development	0.48	0.48	-	-	-	0.48	Funding sought
1.0.3	Tourism Marketing in Europe	8.65	8.65	-	1.20 (CBI/IMPOD) (SWE) (NET)	-	7.45	Funding sought.
1.0.4	Intra-Regional Tourism Marketing	0.40	0.40	-	-	-	0.40	Funding sought
1.0.5	1. North America & Pacific Rim Market Research Projects	0.34	0.34	-	0.06 (CFTC)	-	0.28	Under implementation.
	2. Scandanavian Market Research	-	-	-	-	-	-	
	3. Eastern European Market Researcg	-	-	-	-	-	-	Proposals with USSR.
2.0.1	Product Development	-	-	-	-	-	-	Under review.
3.0.1	Classification of Hotels & Tourism Plant	0.20	0.10	0.10	0.10 (SADCC) 0.10 (UNDP)	-	-	Under implementation by WTO.
3.0.2	Harmonization & Standardisation of Tourism Statistics	0.40	0.30	0.10	0.10 (SADCC) 0.30 (WTU/UNDP)	-	-	Under implementation by WTO.
4.0.1	Hotel & Tourism Training	-	-	-	- 0.10 SADCC)	-	-	Transferred to Manpower Sector.
	TOTAL	10.49	10.27	0.22	1.98	0.00	8.61	