Challenges and Future Perspectives for Tourism Development in The Central Rift Valley, Ethiopia

In collaboration with the project 'Ecosystems for water, food
and economic development in the Central Rift Valley'
and the Horn of Africa Regional Environmental Network (HoA-REN)

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Preface

All information in this report is original. No other sources than mentioned and referred to in the text have been used for the creation of this report.

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Keywords:
Tourism development, tourism planning, actor-network, public sector stakeholder, private sector stakeholder, non-profit sector stakeholder, scenario building

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Adriaan Kauffmann
Nijmegen, 19 August 2008

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I. Foreword

After graduating in 2006 in Development Studies on the Radboud University Nijmegen, I enrolled in another Master program called Leisure, Tourism and Environment of the Wageningen University, both in The Netherlands. Prior ideas of enrolment were combining tourism development and international development cooperation. Nowadays I still have this strong idea and ambition. But, Ethiopia changed my perceptions on international development cooperation. This research, especially the fieldwork, have learned me inexpressibly much about tourism development, but especially the role of international development cooperation. This will become clear in this report, but personally and professionally I will take a lot of experiences and knowledge with me. I hope I can use this all in future assignments and jobs. And maybe, in the future when I have the position and capability to express all experiences and knowledge I could make a scientific contribution to the world of international cooperation, development studies and tourism studies.

The scientific comments and support from examiner Dr. Rene van der Duim has been extremely important. I would like to thank Dr. Rene van der Duim for pushing me to focus on particular topics of tourism development and writing this report. It kept me keen, especially during writing this report. From the beginning of this research Dr. Rene gave me confidence that I am capable of doing this research. It shaped my position and attitude concerning this research. I would like to thank Dr. Petra Spliethoff for inviting me to do this research. Special thanks because of her frequent supervision, constructive commenting and especially for giving confidence and directions during fieldwork and writing this report. Dr. Petra Spliethoff's clarifications and support concerning scenario building and her knowledge about Ethiopia has been very important. This research is made possible by HoA-REN and the working group on tourism in the CRV. By this, special thanks to them all for their support and cooperation.

During fieldwork I was working with an experienced tour-guide, namely: Abel Abebe. Actually, we are both working on this research. As a team we discovered the CRV, interviewed stakeholders, explored potentials and discussed every feature of the tourism industry, international cooperation, Ethiopia and our backgrounds. Abel Abebe is an experienced man who has the ambition and capability to become a leading figure in the Ethiopian tourism industry.

I would like to thank my girlfriend and life partner Hilde Boerstal. She supports me during all my studies and assignments already for more than 5 years. Her day to day support made the fieldwork and this report possible. I hope we can continue exploring life together.

I hope you will enjoy reading this study. Questions and comments may raise during reading. I would be happy to correspond about your questions and comments.

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II. Summary

This research studied the CRV tourism industry as part of the project 'Ecosystems for water, food and economic development in the Central Rift Valley' (CRV) and the Horn of Africa Regional Environmental Network (HoA-REN). This study aims to answer the following research question: *What are the potentials, challenges and future perspectives of tourism developments in the Central Rift Valley of Ethiopia?* As part of the future perspective scenarios for tourism development are given. Scenarios are especially meant to shape the vision of the working group on tourism in the CRV. Fieldwork is done in the CRV for three months from September 2007 to December 2007. The research area covers the area between Addis Ababa and the far south where pastoralist communities live. The research area lies in a valley which contains four lakes, namely: Ziway, Abijata, Shalla, Langano and Awassa. The proposition behind this study is that tourism development may improve to the socio-economic and ecological situation in the CRV. This research used various methods for collecting data. Interviews, observations, informal conversations, participatory methods, secondary sources and group interviews. Secondary sources are reports and media articles. Tourism does not have one owner. Many stakeholders are influencing or affected by CRV's tourism industry. Organisations, foundations, authorities, governmental departments, tour operators, hotels and restaurants are central in this research as stakeholders of the CRV tourism industry. In addition, tourists, tour guides, Ethiopians and local communities cooperate during fieldwork. The respondents represents tourism stakeholders from the public, private and no-profit sector. The structure of this report as follows: firstly the tourism potential of the CRV is described. Secondly problems and challenges are described. Finally, scenarios and future perspectives of tourism development are illustrated, explained and discussed.

The CRV does have tourism potential, mostly natural attractions. Current CRV tourism attractions are landscape aesthetics, mammals, birds and natural attractions as hot springs and lakes. Those are features of the CRV which are already visited on a regular basis. CRV does contain some potential historical, cultural and man-made attractions. Most of them are under- or even undeveloped. Both international and domestic tourists are regular visitors in the CRV. International tourists visit the CRV on their way to the traditional tourists destination north and south of the CRV, namely Addis Ababa, the historic northern route and the pastoralist communities in the far south. CRV's position in the Ethiopian tourism industry dependents on these destinations. The CRV is mostly used as a transit area. The CRV has experienced some developments which are in favour of its potential, such as infrastructural developments. In addition, stakeholders in the Ethiopian and CRV tourism industry are in favour of tourism development. Ethiopia is a relatively small tourism destination worldwide, which gives the possibility to grow in terms of tourist arrivals. The CRV might benefit from this, although the CRV will most likely remain a niche market.

Tourism is defined as it includes many geographic, economic, environmental, social, cultural and political dimensions. CRV's tourism industry does show all these dimensions, of which some are critical and challenging the sustainability and even the continuity of it. Various challenges are identified in this study. Social and cultural challenges are related to the host-tourist relationship, willingness to receive tourist and a growing sex-tourism industry. The host-tourist relationship is problematic due to misunderstandings and misperceptions. As a result, tourists are approached by local communities by begging, aggressive arguments and in some cases highly

unwelcomed. This challenges the hospitable identity of Ethiopia, causing negative visitor experiences. However, the willingness to receive tourists is positive, but in any case related to direct benefits. Especially rural communities do expect a wide ranch of benefits which contributes to their own development and survival strategies. A growing sex-tourism industry, of which children are becoming part, causes serious concerns from a humanitarian perspective.

Other major challenges are related to the poor image, marketing, human capacities, and environmental concerns. These challenges do exceed the borders and control of CRV's tourism industry, but do have a significant impact on it. Ethiopia's poor image abroad seems to function as an obstacle to attract more international tourists leaving CRV's tourism industry as an insignificant market in Ethiopia's tourism industry. Promotion and marketing strategies are lacking in the CRV. None of the stakeholders involved seems to be able to carry out a marketing strategy, although it is essential to a tourist destination. Human capacities are lacking all over the CRV. Tourism expertise can be found in Addis Ababa or abroad, not benefiting CRV's tourism industry in terms of programming, planning or marketing for example. Intention to improve tourism knowledge in the CRV are limited as well. Tourism knowledge is unconnected, while a network of tourism knowledge and experience would benefit underdeveloped tourist destinations as the CRV. Environmental concerns are seriously challenging the CRV. Conservation is in practice exploitation of designated natural areas. Natural areas do have significant management problems caused by a lack of planning, human and financial capacities. Locals rely heavily on natural resources, causing over-exploitation. As a result, many natural areas are subjected to degradation challenging the natural attractiveness and consequently its tourism potential. Developing a natural attraction as a tourism product needs serious management.

Special attention should be given to the relationship between water resources and tourism in the CRV. Already the CRV is affected by overcommitted water resources by agriculture, industries and households. Water consumption by these sectors together caused serious natural degradation in many natural areas. Introducing another water dependent industry as tourism would mean a significant negative impact on the available water resources. Tourism demand a significant amount of water. Based on 10.000 tourists with an average stay of two nights, tourists would consume 8.800.000 litres per annum, including all aspects of tourism industry's consumption (see: Chapter 4). Challenges exceeds the tourism industry, since other industries as agriculture and horticulture do demand water as well. Water consumption is a critical challenges when tourism would grow. This study showed that smallholders, which are relatively the biggest water consumers, are not likely to give up their agriculture since they perceive tourism as an additional income generating strategy rather than alternative. An integrated program on water resources is necessary in the CRV. Tourism could be part of this program, but it should have consequences for water consumption of other sectors.

Other major challenges are related to the institutional structures behind CRV's tourism industry. Rules, regulations, contracts, leaderships, partnerships and expectations of stakeholder are in reality contradicting the whish to develop CRV sustainably. Rules and regulations are in place, but not implemented consequently. Conditions in contracts do show similarities to this. As such, the legislative environment of CRV's tourism industry is non-obligatory to its stakeholders, and non-supportive as well. Leadership is centralised in Addis Ababa making it difficult to address local concerns and interests in tourism planning and decision making

processes. Partnerships are needed in CRV's tourism industry and initiated to some extend, but not succesfull due to conflicting agendas and concepts. Although every stakeholder is in favour of tourism development, expectations among them differ strongly. The public sector is centralised and face challenges on power allocations among the regional and local governmental bodies. The non-profit sector is concept focussed rather than structural change focussed. Private sector is a powerful force in CRV's tourism industry which is looking for clear guidelines and supportive environment. Locals do expect direct benefits from tourism which would contribute to their development and survival strategies. Common sense building among stakeholders is important, especially knowing the challenges the CRV's tourism industry is facing.

Theoretically tourism could improve the socio-economic and ecological situation in the CRV, but it might increase mentioned problems and challenges when interventions are not initiated. As such, a future perspective seems to be pessimistic. But, this study established four scenarios which could incorporate tourism as a development strategy. It could make tourism a 'smokeless' industry and even contribute to sustainable development.

Scenarios are distracted from the potentials, problems and challenges. A combination of contradicting extremes in both variables gives potential scenarios. In institutionalisation centralised leadership is placed opposite to decentralised leadership. Concerning development ideology, sustainability is placed opposite to economic development. Scenario (1) represents the macro-economic approach. Economic development is initiated and executed by centralised governmental leadership together with a group of (inter)national tourism stakeholders. Scenario (2) represents a Sustainable Tourism network. International and domestic stakeholders together define tourism development. Sustainability is a focal point here. Power in terms of human and financial capacity is allocated among international non-profit organisations and international research institutes. Scenario (3) describes an ideology of economic development on a regional level. Regional and local authorities are defining and managing tourism development in the CRV. Finally, scenario (4) is a comprehensive approach of all stakeholders and sustainability issues. Tourism development is a result of consulting each stakeholder involved on a local and regional level. All interest groups are involved. Tourism development is the outcome of negotiations, consultations and deliberations between the various stakeholders on a local, regional and national level. In each scenario the role of governments is essential. Each scenario does face the challenges mentioned in this study, but differ in their approach and priorities. Management and planning ideologies are the most important factors determining the continuity and sustainability of CRV's tourism industry.

The scenarios have their constraints and advantages in the situation of CRV's tourism industry. Sustainability principles are needed in CRV's tourism planning. To incorporate these principles changes in ideology and management are needed. Power, capacities and partnerships are driving forces behind this. Whatever tourism development strategy chosen, these driving forces has to be taken into account. It was not the intention of this study to dictate one scenario or tourism development program. All four scenarios are imaginable strategies for tourism development. Among CRV's tourism stakeholders discussions can be started in order to come up with a constructive strategy for tourism development planning in the CRV.

Chapter 1. Introduction

"If we knew what it was we were doing, it would not be called research, would it?"
(A. Einstein)[1]

1.1. Background

The request for this study came to me on the 26th of February 2007. The request came from a group of organisations, research institutes and companies which are working in the Central Rift Valley (CRV), Ethiopia. As they concluded, the situation of the CRV is critical in terms of ecology and economy. Tourism could be an interesting sector within the development of the CRV. The group of committed stakeholders are part of the Horn of Africa Regional Environmental Network (HoA-REN). This network is working on development issues in the Horn of Africa, mostly related to natural environments. One of their support sectors is promoting new and high value chains for sustainable products and services, such as tourism. The CRV, as part of this area, was in need of knowledge concerning potentials and challenges for tourism development. When CRV's tourism potential became clear a working group on tourism was established. This working group is related to HoA-REN and already designated some destinations in the CRV as potential tourism attractions (CRV-WG 2007:3). An overview on challenges and possible strategies for tourism development is needed. This research is answering this need.

In the CRV a lot of researches from various disciplines has been conducted, like on wetlands and conservation. Within the reality of the CRV those disciplines are interrelated. Tourism becomes another discipline to be added to contribute to the overview of involved stakeholders. All committed stakeholders do have the intention to contribute to poverty-reduction and sustainable development in general. Integrated strategies are needed to address the various dimensions of poverty, since they are interlinked and interdependent. Tourism might become part of this integrated strategy. This study will elaborate this extensively, especially on its challenges in order to secure that objectives are achieved efficiently and effectively for the benefit of the whole CRV society and its natural environment.

1.2. Assumptions and propositions

CRV's situation is critical mainly because of ecological events. Water resources decline due to decreasing fresh water resources and lakes which become saline. Soil degradation due to agricultural activities are a main concern and low fish stocks are reported as well. The local and regional economy is challenged as a result, especially for natives. Industrial developments, such as large-scale foreign horticulture and floriculture enterprises entered the CRV and is believed to have a significant impact on its society and environment. CRV's tourism potential remain doubtless although attractions are challenged by environmental degradation as well. A HoA-REN study recommended after declaring the ecological vulnerable situation of the CRV: "*explore the opportunities to further develop the eco-tourist sector and its potential contribution to the regional economy*" (Hengsdijk & Jansen 2006:23). An international NGO, related to the HoA-REN, also emphasises that tourism development could function as an alternative income generating strategy (Interview 09-2007). In

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[1] Retrieved from: http://www.quotationspage.com/quote/5069.html 20-05-2008

addition, an Ethiopian NGO documented a possible positive relationship between tourism development and economical development of rural communities (Interview 10-2007). Moreover, it is believed that tourism development may contribute to nature conservation or rehabilitation and economic development, commonly known as eco-tourism development. For example, farmers could make an alternative income strategy out of tourism which would decrease their dependency on agricultural activities. As a result, limited soil degradation which is partly caused by intensive agriculture of smallholders. So, it can be propositioned that tourism development may contribute to the development of rural, local and regional economies and its natural environment. This relationship will be taken into account.

Tourism does not has one owner. Tourism is related to the work-fields of a wide ranch of stakeholders from the public, private and non-profit sector. To identify opportunities for tourism development for the benefit of CRV's socio-economics and its natural environment, the proposition is made that the position and roles of all stakeholders in the process of tourism development has to be identified. Moreover, all stakeholders which has interest in tourism development for socio-economic development and rehabilitation of the natural environment are consulted. The proposition is that identifying and consulting all identified stakeholders contributes to sustainable tourism development planning.

1.3. Objectives

Following the prevailing ambition to encourage tourism developments in the CRV as an important driver for improving the socio-economic ecological situation in the CRV this study aims to give insights, challenges and potentials of CRV's tourism industry. On that basis future perspectives will be given by building scenarios. So, the objective of this study is to develop scenarios for tourism development in the CRV based on an analysis of potentials and challenges. This will contribute to researches, projects and discussions among stakeholders in CRV's tourism industry. Scenarios are especially meant to shape the vision of the working group on tourism in the CRV. As such, this research will contain some visionary statements. As was the intention prior to this study, it could and should have implications for future tourism development planning and strategies in the CRV.

1.4. Research questions

Based upon the foregoing description, this study is meant to find an answer on the following main research question and sub-questions:

What are the potentials, challenges and future perspectives of tourism developments in the Central Rift Valley of Ethiopia?

a. What is the tourism potential and what are the factors supporting the tourism industry of the Central Rift Valley, Ethiopia?

b. What challenges the continuity and sustainability of the tourism industry of the Central Rift Valley, Ethiopia, according to stakeholders?

c. Which future perspectives for tourism development can be derived from tourism potential and challenges of the tourism industry in the Central Rift Valley, Ethiopia?

1.5. Research area

Map 1.1.: Map of Research Area

The working group on tourism in the Central Rift Valley (CRV) have pointed out existing and potential tourist attractions in the CRV, mainly natural attractions. Therefore, in this study the research area is described as CRV or CRV tourism industry. Geographically and from a tourism perspective the research area lies south of the capital, Addis Ababa. It is in between Addis Ababa and the far south where pastoralist communities are living. Both focal points of the Ethiopian tourism industry. It contains five lakes, namely Ziway, Langano, Abijatta, Shalla and Awassa. Roughly, the size of the research area is 200 by 200 km. The research area falls in two regions, namely Oromia and Southern Nations Nationalities People Regional State (SNNPRS). Figure 1.1. shows the map of the research area[2]. On the map are the most important cities and lakes illustrated. Because this is a tourist map, several attractions are showed as well. In the following most of the names given on this map will come back.

1.6. Structure of this report

This thesis contains six chapters. In this chapter this study is introduced. This paragraph introduces all chapters of this report. The structure of this thesis covers all issues researched. It has the aim to give perspicuous arguments in order to come up with conclusions in the end.

Chapter 2 gives the theoretical background of this research. Each topic discussed in this study is based upon scientific concepts and debates. Definitions will be given and analytic tools will be introduced. Special attention will be given on scenario building. Within this chapter the methodology will be discussed by introducing the respondents and used methods and techniques.

Chapter 3 gives an overview of Ethiopia in general terms. Ethiopia is described in terms of its socio-economic, ecological and political situation. In addition, the potential and current position of the CRV in the Ethiopian tourism industry is discussed.

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[2] Retrieved from: International Travel Maps (2006), Map of Ethiopia, ITMB Publishing LTD., Vancouver, Canada

Chapter 4 illustrate challenges in or related to the CRV tourism industry. Those can be of all kind and are the result of extensive fieldwork. They are divided into three themes, namely: the tourism industry itself, social and cultural issues and institutional structures. This chapter aims to come up with underlying causes of the elaborated challenges of CRV's tourism industry.

Chapter 5 gives future perspectives for tourism development in the CRV. It shows strategies for tourism development planning, discusses its constraints, advantages and its relationship with the contemporary tourism industry. To give concrete future perspectives scenarios are build upon four variables. Each variable does have its origin within previous chapters and propositions of this study. This chapter aims to trigger discussions and shape visions among stakeholders. Moreover, it aims to influence tourism development planners in the CRV.

Chapter 6 gives the conclusions of this study by answering the research questions given in paragraph 1.4. The conclusions will reflect on the assumptions and propositions of this research as well.

Recommendations will be given throughout the report as well as sub-conclusions. Added to this report you can find a reference list representing used literature, secondary and media resources. A short review on validity and lessons learned is presented. Annexed a list of participants and list of identified challenges in CRV's tourism industry are given.

Chapter 2. Theorising the Tourism Industry and Scenario Building

*"Misquotation is, in fact, the pride and privilege of the learned. A widely-read man
never quotes accurately, for the rather obvious reason that he has read too widely."*
(Hesketh Pearson 1934)[3]

2.1. Introduction

This study examined the tourism industry of the Central Rift Valley (CRV) by questioning: ***What are the potentials, challenges and future perspectives of tourism developments in the Central Rift Valley of Ethiopia?***

In finding answers many issues are addressed in this study. Those issues do have their origin in the analytical approach of this study. Three main analyses are conducted in this study, namely: stakeholders perspectives, tourism development ideology and institutionalisation. In addition, future perspectives are developed by building scenarios. In this chapter the three analyses and scenario building exercise are theorised.

2.2. Tourism and stakeholders perspectives

In every research definitions shape the way the researcher approaches the field of study. Tourism has a contested history of definitions. Tourism is not just the temporary movement of people to destinations outside their normal places. Tourism includes many geographic, economic, environmental, social, cultural and political dimensions (Gunn, 2002:9). A tourism industry has a strong relationship with those dimensions because of its dependency and impact on it, and the interests of its stakeholders.

The movements of travellers within a destination is organised and analysed in various ways. Lue and Crompton (In Gunn, 2002:152) elaborated at least five different spatial configurations of geographic patterns of destinations, namely: *Single Destinations*, *En Route*, *Base Camp*, *Regional Tour* and *Trip Chaining*. A single destination refers to tourist activities within one destination. En Route refers to several destinations and attractions visited en route to a main destination. The Base Camp principle refers to visiting all kinds of destinations and attractions from a particular destination within a particular tourist zone. A Regional Tour refers to several destinations visited while being around in a target region. Trip Chaining means a touring circuit of several destinations. These configurations can give the CRV a profile in the wider tourism system in Ethiopia.

The *economic dimension* of tourism is diverse. In this study the economic dimension from a destination perspective is central. Holden (2000) identified six potential economic benefits for destinations, namely: foreign exchange earnings, reduction of the trade deficit, employment creation, increased monetary flow, strengthening of linkages between economic sectors and diversification of the economy. Those potential benefits can be specified on a local or regional level. *Environmental or ecological dimensions* of tourism contains many issues. Conservation, use of natural resources, landscape aesthetics and the interaction of humans with the natural environment are examples of the environmental or ecological dimension of tourism. The *social and cultural dimension* of tourism is extensively discussed among theorists. There is no binding framework that relates

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[3] Retrieved from: http://www.quotationspage.com/quote/26764.html on 04-05-2008

human nature and concomitant socio-anthropological influences in tourism business. Conventional structural analyses can be enriched by considering the role of cultural and personal influences in tourism's production (Papageorgiou, 2008:212). As such, the socio-cultural dimension is placed within the stakeholders perspective analyses. The political dimension of tourism can be described as the legislative, juridical and policy environment which is shaped by the government. The political dimension can be seen also as the positioning of stakeholders from the public, private and non-profit sector. Those who guide or direct tourism developments for the future encompasses a huge array of planners (Gunn 2002:10). Planners come from all three sectors, namely public, private and non-profit. Their standpoints, objectives and contributions in the tourism industry represents the political dimension. This dimension is elaborated in paragraph 2.5 and 2.6. on the institutionalisation and planning process.

So, the CRV tourism industry can be divided into geographic, economic, environmental, social, cultural and political dimensions. Stakeholders are influencing and are influenced by those dimensions of the CRV tourism industry, as will become clear in the next paragraph about the actor-network theory. It is important to consider the interests or perspectives of the different stakeholder groups as defined by the roles which they serve regarding the particular development initiative (Sautter & Leisen 1999:316). Therefore, stakeholders perspectives related to the geographic, economic, environmental, social, cultural and political dimensions of tourism are consulted for this study.

2.3. The dualism of stakeholders and the tourism industry

Consulting stakeholder perspectives in tourism research has its background in tourism studies. Tourism does not have one owner, it is controlled by a multitude of owners (Gunn 2002). The public, private and non-profit sector stakeholders shape the reality of a tourism industry. Actors and structures are considered to be two separated agents determining each other action and appearance. As such, actors are defining and influencing the appearances of a tourism industry. Similarly, those appearances do have an impact on the contribution of actors. This dualism is described from a sociological perspective by Giddens (1986) in the 'structuration' theory. Actors and their networks influences each other action and appearance. The assumption of an actor-network theory is the ability of an actor to act. This ability of an actor to act depends on the capacity it has. Within this study the capacity of actors, since that influence the appearance of a tourism industry, is analysed on human and financial capacities.

From a tourism study perspective Van Der Duim (2005) established an actor-network theory which combines multiple dualisms as micro-macro, global-local, nature-society and actor structure. In the actor-network theory, the concept of actor and network are concatenated and one cannot be defined without the other. Action is the result of network construction, and networks are constructed out of all kinds of bits and pieces (Van Der Duim 2005:90). In this study, actors are identified as stakeholders and the network is identified as the CRV tourism industry. Stakeholders are constructing the CRV tourism industry and vice versa. Stakeholders represent the public, private and non-profit sector, all equally important and playing their own role. Therefore, stakeholders representing the public, private and non-profit sector are consulted. Examples of stakeholders active in the tourism industry are local communities, companies, governmental authorities and non-governmental organisation (NGO). Scheme 2.1. illustrates the dualism of sector stakeholders and CRV tourism industry. An interplay of sector stakeholders and the tourism industry is

identified. The connection between the sector stakeholders and the tourism industry represents their interests, perspectives and impacts.

Figure 2.1. Sector Stakeholders – Tourism Industry Dualism
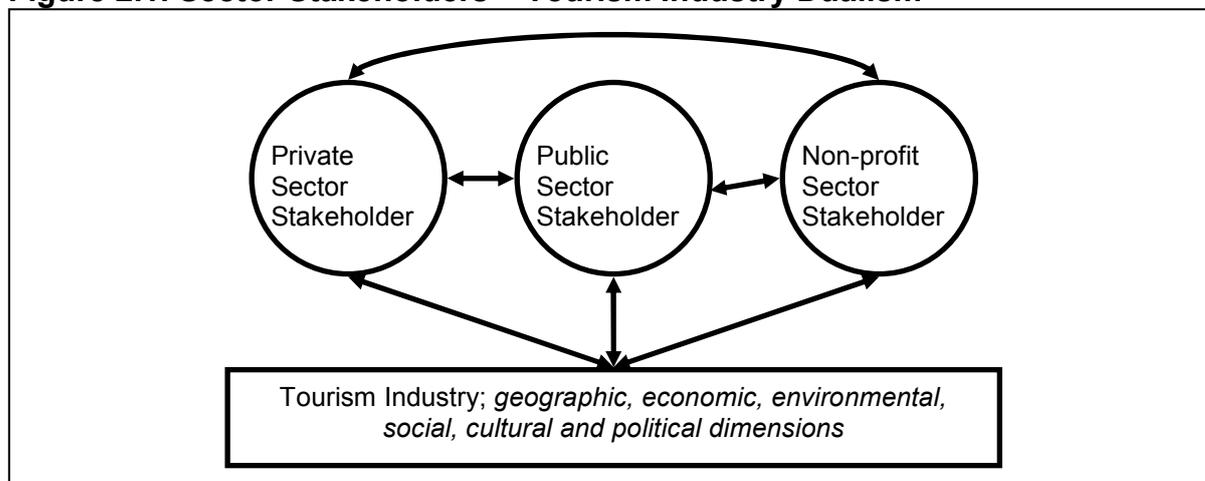
In scheme 2.1. the tourism industry is defined by its dimensions given in paragraph 2.2. The package of these tourism dimensions and its interaction with its stakeholders is central to this study.

2.4. Development ideology

This study has the aim to identify future perspectives for tourism development on a regional scale, namely the Central Rift Valley (CRV). In this context, analysing development ideologies, including tourism development concepts, is an important topic to elaborate. Ideologies among stakeholder might differ, depending on their objectives or relationship with the tourism industry. For example, non-profit sector stakeholder might be in favour of eco-tourism, while the private sector stands for a liberal economic model. In this study, the interest, perspectives and influences of stakeholders towards the CRV tourism industry are analysed in terms of development ideologies. From the propositions of this study two development ideologies can be derived, namely economic development and sustainable development. Both will be elaborated from here.

During the history of development studies two contradicting development thoughts occurred, namely: the economic and alternative development approach. The economic model represents a neo-liberal, macro-economic and capitalistic paradigm. The alternative development approach represents sustainable development, basic needs, self-reliance and bottom-up development (Potter, 1999:45-69). Both models of development thinking are representing the sum up of all ideas (e.g. strategies, theories and ideologies) within each model.

Economic development in this study deals with modernisation theories, neo-liberal policies and a top-down approach. This model is often the result of a wish to shift from a traditional to a modern society, based on western positivism. The latter is also called 'eurocentric development thinking'. Urban-based industrial growth and resource-based rural development strategies are central to achieve modernisation. Investments, especially foreign direct investments (FDI), are needed to achieve results through this path of modernisation. A strong dependency on world market systems and a free-market system defines which industries and resources will be

tapped. This is the neo-liberal ideology. Centralised leadership to apply those development thinking is often the case, described as a top-down approach.

In tourism the economic model is described as corporatism by Hall (in: Bramwell and Lane 2000:143). It refers to the shift of governmental action from a administrative model to a corporatist model which emphasises efficiency, investment returns, the role of the market and relationships with stakeholders usually defined as industry. This shift shows privatisations and commercialisations of tourism within a country. To put it in other words, the government is withdrawing or decreasing its involvement within tourism. Strong links with the private sector, especially on a national level, is central to corporatism strategies. Management theories related to corporatism are prescribing partnerships with the private sector in order to be successful in privatisations and commercialisations (Hall in Bramwell and Lane 2000:144). Remaining prior responsibilities of the government are promotional campaigns and standardisation of tourist services.

The alternative development approach represents sustainable development, basic needs, self-reliance and a bottom-up approach. The bottom-up approach argues that development (of the poor) has to be established from local knowledge, level, arguments and visions. Their interest is at stake and should influence development programs. The basic needs approach focus' on the primary living conditions of the poor. Food, housing and security should be safeguarded first. Self-reliance instead of dependency on (inter)national market systems is preferred. Import-substitution strategies or economic backward linkages can be the consequence of self-reliance policies. Sustainable development is a key term within this model. Sustainability has, like tourism, a contested history of definitions. It emphasizes the concern for ecological, social, cultural and economic issues. An often used and clear model in this context is the people-planet-profit concept. People refer to the society in terms of social and cultural issues. Planet refers to the ecology and profit refers to the economy of a society. A balance is necessary to achieve sustainability. In theory, every aspect in this model is equally important. Changes in the profit zone could harm the people and the planet. Those changes should therefore be avoided in order to achieve sustainability. In practice, sustainability is considered a contested concept that is socially and politically constructed and reflects the interests and values of those involved (Mowforth and Munt, 2006:18). Central to most of all definitions of sustainable development are the balance and time factors. To put it more clearly, a balance between humanity and nature for current and future generations.

Tourism is becoming part of development ideologies. Tourism exists or could exist as a powerful force for development, locally and globally. This makes tourism development an appealing strategy for economic, ecological and socio-cultural activities and growth (Brohman 1996). Since the 1980's there is an increasing focus on tourism as a form of economic development in less developed countries. Increasingly, concerns over the environment, socio-economic and cultural consequences of tourism development are becoming part of tourism development models. The majority of these concerns do have their origin in the concept of sustainability. In planning tourism development numerous efforts on incorporating sustainability in tourism occurred over time in concepts like eco-tourism, community-based tourism, and responsible tourism. All of them do meet theoretically and practically parts of the sustainability principles, but none of them do represent the whole concept of sustainability. Sustainable development principles exceeds tourism or attraction development concepts (Collins 1999:99). In fact, it represents basic

principles which should be central in every sector when sustainable development is the main objective. The application of the alternative development approach in tourism is about tourism development and sustainability, rather than sustainable tourism development or any other concept of sustainable tourism. As such, sustainability is an integrated approach which exceeds the tourism industry and incorporates other industries and sectors. In this study, tourism development ideologies from stakeholder perspectives and sustainability principles are in focus.

2.5. Institutionalisation

The other central theme of analysis in this study is the institutionalisation of the tourism industry. As stated earlier, tourism does not have one owner. The public, private and non-profit sector are influencing tourism. Stakeholders from those sectors may have a particular position in the tourism industry. The position of stakeholders differs in each tourism industry. Clarifying this provision of positioned stakeholders within the CRV is useful for identifying scenarios for tourism development. A clear line up of stakeholders contributes the decision making process, whatever ideology is adopted. The CRV tourism industry is analysed in terms of the positioning of public, private and non-profit sector stakeholders. In the following these sectors are introduced and theorised.

Tourism is a private sector driven industry, but the public sector has an important role to play in creating an attractive business development, promoting tourism and regulation. (HGL & GIRD 2007:6). The public sector refers to governmental stakeholders. Enactment, policy building processes, implementation of laws, rules and regulations seems to be the primary goal. States have laws based on precedent and legislative proclamations (Kottak, 2002:449). It is important that the industry has the backing of a supportive policy framework and a good business environment. Marketing, promotion, national parks and other attractions such as museums are of a growing interest of the government (Gunn 2002:11). Responsibilities of governments, such as security, infrastructure and water supplies, are related to tourism. These responsibilities are taken into account more often. Understanding policies and practices of governmental stakeholders is essential for clarifying its position within a tourism industry.

The private sector refers to business stakeholders, including associations. In tourism, private sector stakeholders have to deal with a product which is able to achieve satisfactory visitor experience (Gunn 2002:10-11). The role of the private sector is providing the industry with a wide ranch of products which should meet the demands of tourists. Products of the private sector are accommodation, catering, transport and services such as tour-operating. Market research is essential for the private sector. Private sector stakeholders perspectives on a tourism industry are important in understanding potentials and their position in relation to the public and non-profit sector.

The non-profit sector refers to organisations, pressure and interest-groups. This sector is growing in importance. Throughout the world there has been an immense growth of tourism development projects initiated by non-governmental organisations (NGO). Many health, religious, recreation, historic, ethnic, professional, archaeological and youth organisations plan, develop and manage land and services for visitors (Gunn 2002:12). The role of the non-profit sector depends on a country's provision. The interest of the non-profit sector is mostly related to social, cultural and environmental issues on a micro as well as macro level. They execute tourism

developments or are trying to influence other tourism developments by lobbying or advocacy for example.

Local communities are an important stakeholder in this study. They are represented by the public and non-profit sector mostly. Local communities can also represent themselves, out of the administrative system of the government as a stakeholder outside each sector mentioned above. For example, an individual representing his or her family does not represent any sector in such a position. In this study, local communities do represent themselves, and through the public and non-profit sector.

2.6. The Planning Process

In this study special attention is given to the tourism development ideology and institutionalisation behind tourism development planning. The tourism development ideology and institutionalisation shapes the decision making process and its outcomes. As such, ideologies and institutionalisation are interacting. Defining a tourism development ideology and clearing the positioning of sector-stakeholders is an important determination of tourism planning. In scheme 2.2. this interplay is illustrated.

Figure 2.2.: The interplay of ideology and institutionalisation
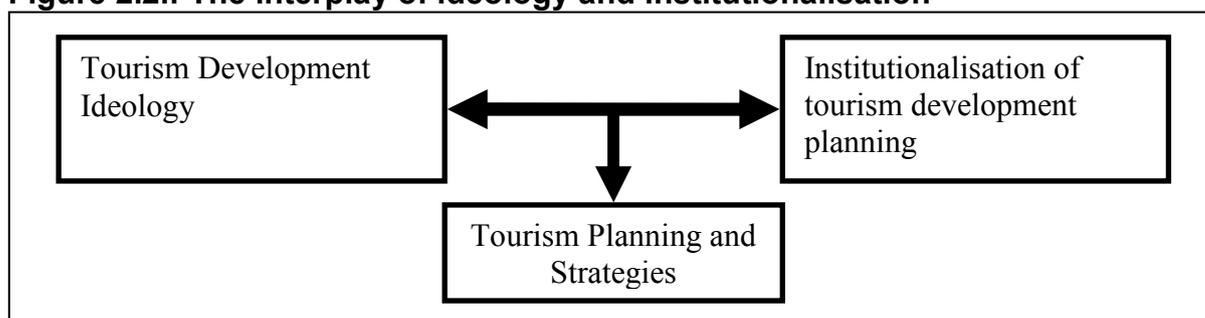
Tourism, like so many modern industries, is essentially an assembly process. In a few situations does one company or organisation control all the components, or all the stages and decision-making processes in the creation and delivery of the tourism product (Bramwell & Lane, 2000:1). Depending on tourism development ideology stakeholders are included or excluded. An collaborative arrangement will be the result. An assembly process or collaborative arrangement refers to concepts about tourism which perceive it as a system. According to Laws (in: Holden 2000:8) the advantages of interpreting tourism as a system are that it avoids one-dimensional thinking and facilitate a multi-disciplinary perspective. All tourism stakeholders together at a destination are related to more than one dimensions of tourism. It can be argued that the involvement of multiple stakeholders is needed in order to avoid of one-dimensional thinking and to facilitate multi-disciplinary perspectives. The importance of involving diverse stakeholders in tourism planning and management is receiving growing recognitions (Bramwell & Lane, 2000:1). This has the consequence of organising collaborative arrangements of stakeholders from the public, private or non-profit sectors, including pressure and interest groups. Four broad issues (Bramwell & Lane 2000:333-5) needs to be taken into account regarding collaborative arrangements, no matter which ideology is adopted. Firstly, the scope of collaborative arrangements. This is the process of inclusion or exclusion of stakeholders. Secondly, the intensity of the arrangement which refers to the

mission and jointly conducted tasks. Task forces or 'loose' links do determine the success of an adopted mission. Thirdly, consensus building among participants. Deliberations, negotiations and consultations should build consensus in order to achieve agreements. Consensus on an adopted mission is needed during the process of collaboration. Finally, the question of resources and capacities. Putting initiatives into practice involves gaining access to resources and creating mechanisms or institutional abilities to accomplish the work.

2.7. Future Perspectives & Scenario Building

Scenarios are widely used by governments, the private sector and the non-profit sector to establish strategies, policies and campaigns. Scenarios can be used to identify current problems and illustrate how this could play out in the future. As such, scenario building is a valuable instrument to learn from past and contemporary experiences and explore possible futures in order to formulate views and opinions and act on it. Not all events do have predictable follow-ups, in many cases there is more then one future. As the philosopher De Jouvenel stressed: the future is not already predetermined. The future is far from ruled or controlled. It is open to many possible futures (2000:38). Especially in tourism, which is a complex industry with more than one pathway, scenarios could play a clarifying and leading role. A correct model which project tourism demand could provide valuable information for all concerned stakeholders (Kaynak et all, 1994:19). Therefore, this study has the intention to come up with various possible outcomes based on past and current experiences. In the following scenario building theory and practices will be discussed in order to come up with an useful analytic frame for this study.

In scientific literature there are many publications about future perspectives, foresights, forecasting, prospective processes and scenario building. While there is no "definitive" scenario process. There is a difference between forecasting and the prospective process, called *projection scenarios* (Wollenberg et al, 2000:24-6). When forecasting focuses on particular quantifiably issues, uses the prospective process qualification and pays attention to breakdowns, breakthroughs and analyses any system of coexisting variables (De Jouvenel, 2000:42). De Jouvenel (2000:46) makes also a distinction between explorative and normative or strategic scenarios. Explorative scenarios do explore possible futures starting from past and current experiences while normative scenarios uses a goal set in the future as a point of departure. This study comes more close to the normative scenario building process.

An adequate way of formulating various scenarios are the Alternatives Scenario Building approach. This approach is published and used extensively by Forestry Research. The purpose of alternative scenarios is to broaden people's thinking about the uncertain future by exploring not one, but a range of possible futures. Alternatives-based scenarios do treat the future as unknowable. Risks are believed to be an important aspect of making decisions in the present. These scenarios do look for drivers of change (Wollenberg et al, 2000:29-31). Risks and drivers of change are described as potentials and challenges in this study.

Scenario planning is a flexible process that can be tailored to different circumstances and different needs. The Department for Transport of the United Kingdom's (2006:6-7) government is using a scenario building technique which is related to the alternative scenario building approach. Their scenario building technique is presented in an extensive 'toolkit'. It is applying and combining science with reality and stakeholder action. It contains four stages and ends up into a

scenario matrix consisting of two axes. In the light of all issues discussed above the following is adapted to this study.

> **Stage 1**: identification and analysis of change drivers
> **Stage 2**: identification of predetermined elements and critical uncertainties
> **Stage 3**: construction of the scenario matrix
> **Stage 4**: construction of the scenario narratives.

Stage 1: Identification and analysis of change drivers.
Drivers of change are factors which are shaping the future contextual environment. Some drivers of change are highly visible now, but others are less so. It is therefore important during this stage of the scenario process to identify a broad range of drivers and to consider which will be most important in the future – rather than to focus solely on which are most important now. Stakeholder perspectives on the various dimensions of tourism are used in this stage. Those perspectives are divided into potentials and challenges which form the drivers of change.

Stage 2: identification of predetermined elements and critical uncertainties
Once drivers have been prioritised, the next step is to consider how the important ones might play out in the future. In some cases, drivers will be predetermined elements – that is, their outcome will be quite clear – and in other cases drivers will have uncertain outcomes. It is important during this stage of the scenario process to identify and characterise both types of outcome. The uncertainties are used to define the scenario space and to shape narrative production. Predetermined elements define strategic issues.

Stage 3: Construction of the scenario matrix
The scenario matrix defines the main parameters of the scenarios. The matrix is constructed by juxtaposing two future perspectives within the critical uncertainty and predetermined element which are in this study tourism development ideology and institutionalisation. In this study economic and alternative development are positioned in front of each other representing the critical uncertainty of CRV's tourism development. Centralisation and decentralisation of implementing those development ideologies are the two perspectives of the predetermined element.

As such, CRV's tourism development depends upon the interpretation of stakeholders when it comes to determining the development ideology and level of implementation.

Stage 4: Construction of the scenario narratives
The scenario narratives are constructed within the logical framework provided by the scenario matrix. The narratives draw on all the material in stages 1 and 2 and also on wider research. The narratives should present the perspectives of different stakeholders in order to provide a sense of the different priorities and issues that exist in each future.

Figure 2.2. shows the scenario matrix framework. The horizontal axis shows the two uncertainties. The other axis is the predetermined element.

Figure 2.3. Scenario building matrix (DfT, 2006:20)

Predetermined element

Narrative 1   Narrative 2

Uncertainty   **Uncertainty**

Narrative 3   Narrative 4

Predetermined element
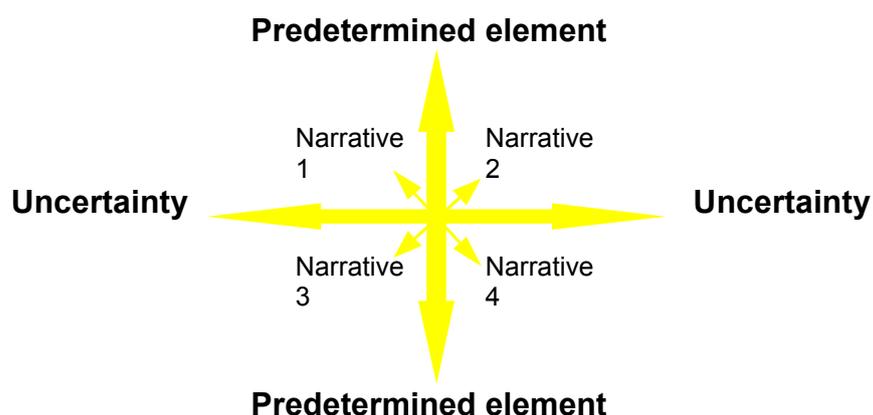
Out of this scenario building process, hypothetical debate leading statements for tourism development will be seen. Those narratives for tourism development function as examples and debate resource for stakeholders working on CRV tourism development. Before scenarios can be developed potentials and challenges need to be known as is discussed in this chapter.

2.8. Methodology

This study uses data coming from various respondents and a wide ranch of sources. As a consequence this study used a wide ranch of methods and techniques. The nature of this study is qualitative, mostly because it focus on the perspectives of stakeholders. Qualitative research gained recognition in tourism studies over the past decade. Qualitative research is a multi-method focus involving an interpretive, naturalistic approach to its subject matter. This means that qualitative researchers study things in their natural setting, attempting to make sense of, or interpret phenomena in terms of the meanings people bring to them. Qualitative research involves the studied use and collection of a variety of empirical materials (Denzin & Lincoln in: Riley & Love 2000:168). From that point qualitative methods and techniques has been used during this study. In this paragraph used methods and techniques are presented.

Used methods and techniques are: open interviews, structural interviews, observation, informal conversations, secondary sources and participatory methods. Topic lists steered questions, observations and requests during gathering data. Topic lists were adapted to the respondent and situation researched. As a result, each research activity was different, but the set up was related to the theoretical background and objectives of this study. Stakeholder perspectives on this were central. Open interviews of respondents are mostly conducted. Participatory methods are conducted by doing group interviews and group discussions. Observations and collecting secondary sources took place during the whole period of research in order to increase the understanding of, general knowledge about and necessary backgrounds of the issues mentioned in this study.

The theoretical principles of scenario building has been explained in paragraph 2.7. In this study, the development of scenarios is based upon an analysis of the potentials and challenges of tourism development in the CRV. Underlying causes of all challenges has been analysed, by interrelating each challenge and envisaging the potential long term outcome. The outcomes of the overall analysis are used to define the variables of the scenario matrix. As such, this process of scenario

development has been conducted by the researcher based upon all data available, provided by written resources and consulting a wide ranch of stakeholders.

2.8.1. Respondents and data resources

This study uses various data coming from a wide ranch of sources. Around sixty persons are consulted, all with a (in)direct relationship with the tourism industry in Ethiopia, and especially the CRV. Besides those respondents, this research is based on countless pages of information coming from every corner. Those pages come for example from newspapers, scientific reports and other reports, written policies, books and e-mailing.

The sixty respondents represent sector stakeholders of the Ethiopian tourism industry, especially the CRV. The respondents are working for government authorities, tourism commissions, non-governmental organisations, interest groups, associations, tour-operators, research institutes, hotels and restaurants. Besides those institutions civilians and tourists are interviewed as well. Civilians are living around a tourist attraction and are mostly described as local communities in this report. Tourists are interviewed on various locations within the CRV and outside. See Annex II for a list of respondents, which agreed on sharing names and contact information, participating during this fieldwork.

Two key informants did play an important role during fieldwork. One is working for years as a tour guide and is active in the local tourism industry by doing a wide ranch of activities and jobs. The second key informant graduated in Tourism Studies and is working as a lecturer on a regional University. Practically they contributed to the research by organising trips, translating and interpreting interviews and providing written documents. Their experience, understanding and explanations of the Ethiopian and CRV tourism industry have contributed to this study.

Chapter 3. From Ethiopian History to Central Rift Valley Tourism Potentials

"There is always something new out of Africa"
(Pliny The Elder)[4]

3.1. Introduction.

In this chapter Ethiopia and its tourism industry is introduced. A profile of the Ethiopian history and current ecological, socio-economical and political status is given. Position, potentials and attractions are presented.

3.2. Ethiopia in general

Ethiopia, officially the Federal Democratic Republic of Ethiopia, is a country situated in the Horn of Africa that has been landlocked since the independence of its northern neighbour Eritrea in 1993. Apart from Eritrea to the north, Ethiopia is bordered by Sudan to the west, Kenya to the south, Djibouti to the northeast, and Somalia to the east. See Map 3.1. for a map of Ethiopia.

Map 3.1.: Map of Ethiopia
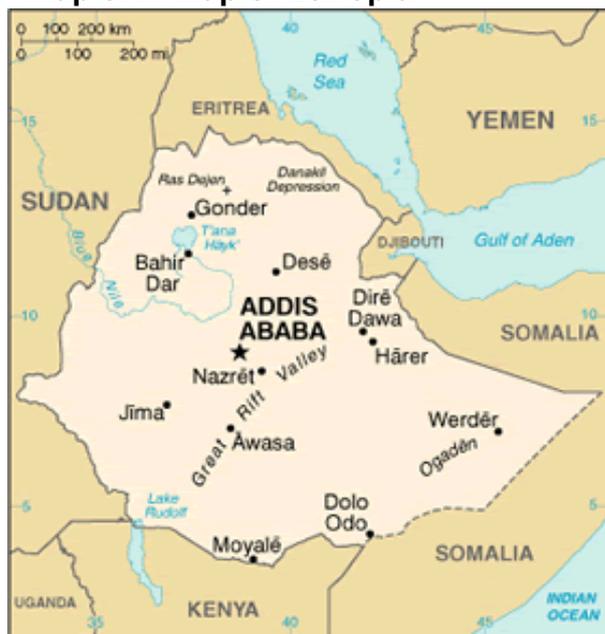
Ethiopia is one of the oldest nations in the world and Africa's third-most populous nation (Van Beurden 2004:26). It has yielded some of the oldest traces of humanity, making it an important area in the history of human evolution. Ethiopian dynastic history is traditionally held to have begun with the reign of Emperor Menelik I in 1000 BC. The roots of the Ethiopian state are similarly deep, dating with unbroken continuity to at least the Aksumite Empire (which adopted the name "Ethiopia" in the 4th century). After a period of decentralized power in the 18th and early 19th centuries known as the Zemene Mesafint, the country was reunited in 1855 by Kassa Hailu, who became Emperor Tewodros II, beginning Ethiopia's modern history. Ethiopia's borders underwent significant territorial expansion to its modern borders, especially by Emperor Menelik II and Ras Gobena, culminating in its victory over the Italians at the Battle of Adwa in 1896, and ensuring its sovereignty and freedom from colonization. Ethiopia was occupied by Mussolini's Italy from 1936 to 1941, ending with its liberation by British Empire and Ethiopian Patriot forces[5]. Historically a relatively isolated mountain country, Ethiopia by the mid 20th century became a crossroads of global international cooperation (Van Beurden 2004:23-5). It became a member of the League of Nations in 1923, signed the Declaration by United Nations

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[4] Retrieved from: http://www.quotationspage.com/quote/24429.html on 06-05-2008
[5] Retrieved from: www.wikipedia.org. on 2-4-2008

in 1942, and was one of the fifty-one original members of the United Nations (UN). The headquarters of United Nations Economic Commission for Africa (UNECA) are in Addis Ababa, as are the headquarters of the African Union (formerly the Organisation of African Unity), of which Ethiopia was the principal founder.

3.2.1. Politically

Politics of Ethiopia takes place in a framework of a federal parliamentary republic, whereby the Prime Minister is the head of government. Executive power is exercised by the government. Federal legislative power is vested in both the government and the two chambers of parliament. On the basis of Article 78 of the 1994 Ethiopian Constitution, the Judiciary is completely independent of the executive and the legislator[6]. The election of contemporary Ethiopia's 547-member constituent assembly was held in June 1994. This assembly adopted the constitution of the Federal Democratic Republic of Ethiopia in December 1994. The elections for Ethiopia's first popularly-chosen national parliament and regional legislatures were held in May and June 1995. There was a landslide victory for the Ethiopian People's Revolutionary Democratic Front (EPRDF). Zenawi's government was elected in 2000. Zenawi also won the 2005 election returning him to power.

The EPRDF-led government of Prime Minister Meles Zenawi promotes a policy of ethnic federalism, devolving significant powers to regional, ethnically-based authorities. Ethiopia today has nine semi-autonomous administrative regions that have the power to raise and spend their own revenues (Van Beurden 2004:21-2). The research area for this study, the CRV, is part of two administrative regions, namely: Oromia and Southern Nations Nationalities People Regional State (SNNPRS).

On a federal level tourism became a ministerial affair in 2005 by the establishment of The Ministry of Culture and Tourism. Before 2005 tourism was managed through a tourism commission, but most of the responsibilities were allocated among ministries and commissions for economic affairs.

3.2.2. Economy

Ethiopia follows a macro-economic policy which mean implementing the free market principle or capitalism. In many national development programs the private sector is seen as the leading sector towards a more prosperous future. Privatisation of state-owned industries is a consequence of this. During the period 2003-05, 111 state-owned enterprises were offered for sale, most of which were in the industries of food, beverages, garments, leather and shoes, hotels and tourism, printing, construction, textiles and agriculture (OECD 2007:262). Still some industrial sectors are prescribed to Ethiopia's government. The Ethiopian constitution defines since 1974 the right to own land as belonging only to "the state and the people". Citizens may only lease land (up to 99 years), and are unable to mortgage, sell, or own it (Van Beurden 2004:41-2). The Ethiopian government have monopolised the telecommunications sector and preserved the financial sector only for Ethiopians. For other industries foreign direct investments (FDI) are prioritised.

Agriculture accounts for almost 47 percent of the gross domestic product (GDP), 80 percent of exports, and 85 percent of the labour force (OECD 2007:254). The top three export earning resources are coffee, oilseeds and tourism. Tourism

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[6] Retrieved from: http://www.civicwebs.com/cwvlib/constitutions/ethiopia/constitution_1994.htm on 20-03-2008

generated approximately US$ 132 million in country expenditure revenue (World Bank 2006:1). Recent development of the floriculture sector means Ethiopia is becoming one of the top flower and plant exporters in the world. Ethiopia is also the 10th largest producer of livestock in the world. Ethiopia's livestock population is believed to be the largest in Africa. The estimated percentage of CRV citizens owning livestock is 80% and a herd size of 7 on average (Central Statistical Agency 2006:67-8) Ethiopia also has large mineral resources and oil potential in some of the less inhabited regions; however, political instability in those regions has harmed progress. Recently, Ethiopia has had a fast growing annual GDP and it was the fastest growing non-oil dependent African nation in 2007. So, the economy is dependent upon rural areas and natural resources.

Ethiopia considers two important ideas at the same time with regard to tourism: as means to improve the country's image in the world, and to increase its foreign exchange earnings. In Ethiopia, tourism is one of the focal sectors of the five-year development plan (PASDEP[7] – 2005-2010). Ethiopia is also striving to use tourism against the war on poverty. This is in line with global initiatives such as the Sustainable Tourism-Eliminating Poverty (ST-EP), an initiative of the UNWTO[8] (HGL & GIRD 2007:7). As the state minister[9] of said: "*Ethiopia is an undeveloped country; we are trying to maximize what we have in order to benefit our society. Ethiopia's tourism sector is one of these sectors that we think will be beneficial and create employment opportunities … tourism is one of the areas that we wish to promote, we are welcoming foreign direct investment in Ethiopia's tourism sector.*" Economic development and poverty reduction should become a win-win situation for Ethiopia.

Socio-economically Ethiopia is facing serious challenges. Ethiopia is indexed as one of the poorest countries in the world. Socio-economic problems are expected to improve as a result of tourism development. National development programs are emphasising the (in)direct relationship between tourism and Ethiopia's development. Some statistics need to be presented in order to imagine this proposed relationship. United Nations Human Development Index[10] shows a life expectancy of 51,8 years. Gross Domestic Product (GDP) is estimated on 1,055 per capita per annum. An estimated percentage of 40% of CRV's population has access to protected water resources (Central Statistical Agency 2006:37). Socio-economic problems in the CRV have their impact on local natural resources. Inhabitants of the CRV are competing for natural resources, which causes natural degradation as well as decreasing attractiveness for tourism. Ethiopia does show efforts to improve those statistics. Tourism development hypothetically could contribute to the improvement of Ethiopia's socio-economic profile and related impacts.

3.2.3. Environment

Elevation and geographic location produce three climatic zones: the cool zone, the temperate zone and the hot zone. The CRV can be indicated as a temperate zone and is known for its biodiversity because of elevation and hydrology differences. The east and west of the CRV are mountainous. This area is untapped in terms of natural attraction development for tourism. The valley of the CRV does contain more developed tourism attractions. The vegetation of the CRV, especially in the valley, is

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[7] PASDEP: Plan for Accelerated and Sustained Development to End Poverty
[8] UNWTO: United Nations World Tourism Orgnisation
[9] Retrieved from: www.emergingmarkets.org on 12-03-2008
[10] Retrieved from: http://hdrstats.undp.org/countries/country_fact_sheets/cty_fs_ETH.html on 01-04-2008

characterized by Acacia open woodlands. The CRV as analysed in this study contains five lakes of which three are under serious pressure in terms of water supply, mostly due to human pressure. Those three lakes are becoming saline and useless for agriculture as a result. It also effects marine live and wildlife in the area. Tree cover of the lakes area in the CRV is less than 10% and most of the areas less than 5%. For example, the northern part of Abijata Shalla Lakes National Park is for less than 5% covered with trees (Central Statistical Agency 2006:18). Deforestation is a major concern caused by human pressure. Studies suggest that loss of forest contributes to soil erosion, loss of nutrients in the soil, loss of animal habitats and reduction in biodiversity (Scholten 2007). Despite its changing environmental characteristics the CRV is considered to have potential for agriculture, horticulture and tourism.

3.3. The Ethiopian tourism industry

In 2008 a tourism policy is expected from the Ministry of Culture and Tourism. A strategy on tourism development for five years is also under preparation. The strategy consists of six pillars, a) human resource development, b) infrastructure development, c) image strategy, d) service improvement, e) strengthening information and management capacity, and f) domestic tourism promotion. (Japanese Embassy, 2007:3) Expectations of regional tourism commissions are high regarding the federal tourism policy. As a director (interview 12-2007) said: "*we think the policy will bring a lot of good, than we know what we are expected to do.*" This quote refers to the implementation of the tourism policy. So far, nothing can be concluded on the implementation. But, The establishment of the Ministry of Culture and Tourism is evidence of the commitment of the government towards tourism development. The Ministry continues to work on a federal tourism policy and strategy, meanwhile promoting tourist attractions and improving the image of the country (HGL & GIRD 2007:7). The implementation of the upcoming tourism policy in the CRV is an interesting development to be monitored by all stakeholders.

The Ethiopian tourism industry can be roughly divided into three important tourist zones. Firstly, the historic northern route. Secondly the far south where pastoralist communities form tourist attractions. Finally Addis Ababa, the capital, providing qualified tourism services and the central place for international arrival and departure. Ethiopia's principal driver for tourism is the rich culture and history (World Bank 2006:1). This has its origin in 1929 when the Italian scholar Rossini (in: Abbink 2000:7) called Ethiopia '*un museo di popoli*', in his book L'Abissinia. This museum of peoples and cultures can be found in the northern and southern route. The average itinerary of international tourists and their operators show destinations in the north and far south (Observations 2007).

The Ethiopian tourism industry is constantly growing. Tourism has grown at an average annual rate of 13 per cent over the last few years (OECD, 2007:256). Tourism generated approximately US$ 132 million in 2005 regarding in-country expenditure revenues from a base of about 150,000 foreign visitors travelling around Ethiopia (World Bank 2006:1). Arrivals grew from 81.581 in 1997 to 227.398 in 2005. 19% of international tourist arrivals in 2005 did came for holidays. 81% came to Ethiopia for business, transit, conferences, visiting relatives or other reasons. Ethiopian government is expecting that arrivals will increase from 227.398 in 2005 to a specific number of 381.375 arrivals in 2015. Ethiopia's market share in the international tourism market is consistent over a long period. Around 0.017 between 1991 up to 2003 (Ministry of Culture and Tourism 2006:156-166). Ethiopia is

expected to have an international market share of 0,03% in 2008 according the World Travel and Tourism Council (WTTC) (2007:10). This could mean a rapid growth or another way of calculating statistics. Ethiopia's travel and tourism related employment is estimated at 1,388,000 jobs in 2007, 7.1% of total employment, or 1 in every 14 jobs. By 2017, this is expected to be a total of 1,527,000 jobs, 6.1% of total employment or 1 in every 16.4 jobs (WTTC 2007:3). It can be argued that tourism is a growing industry in Ethiopia of increasing economic importance.

Various developments related to tourism can be seen over the past decade. Transport facilities, infrastructural development, increasing accommodations, number of tour-operators, trade missions and security around tourist destinations are improved significantly. Those improvements are allocated within the three zones as described above, benefiting its tourism industry. Developments concerning infrastructure and transport are expected. National programs on infrastructural development are implemented resulting in a constantly growing asphalt-road network. Investments concerning transport are announced. For example a bus company is expected to operate in 2008. The founders of this company said in the weekly Ethiopian newspaper Fortune (28-10-2007:27) that they explicitly focus on the tourism market and middle-class passengers for interregional transport. For the independent traveller those developments are valuable. Air companies are becoming more interested to fly to and from Ethiopia for passenger transport. An increasing number of airline companies signed new or extended contracts in 2007 and 2008. Hotel investments are easy to be confronted with. Every week in all weekly newspapers announcements of hotel investments are published. Most investments planned to be constructed in the capital Addis Ababa. In addition, Ethiopia's current tourism destinations are considered as a safe place to visit by tourist interest groups. This condition is an immeasurable value of the Ethiopian tourism industry contributing to its potential for further developments.

Figure 3.1.: En-route destination pattern
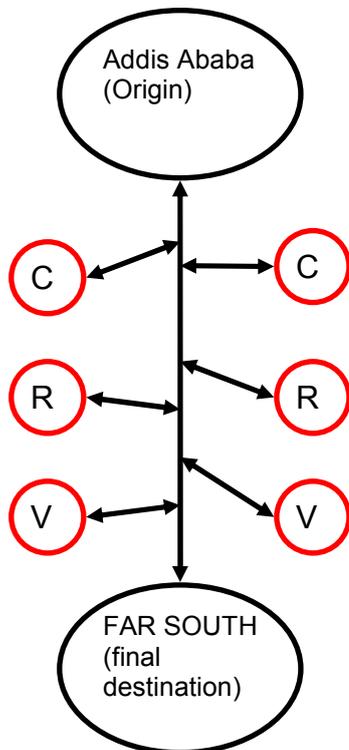
3.4. The Position and Potentials of the Central Rift Valley Tourism Industry

The CRV does not seem to be part of the three traditional tourist zones as described above, but the CRV does have a history which is related to these zones. The CRV can be described as a transit or transfer zone. As a international tour guide said: "*we always pass through this area* (CRV) *on our way to the south. We do have some attractions to visit in this area, but it is not a final destination. That is the far south which is very interesting to visit.*" This means the CRV shows an en-route destination pattern. This might suggest planning, but in this way the CRV has placed itself naturally within the Ethiopian tourism industry. An en-route destination pattern means an origin and final destination outside the CRV. Origins and final destinations are in this case Addis Ababa and the far south. Travelling through the CRV, various attractions are visited. Figure 3.1. illustrates the en-route destination pattern. It

shows the origin and final destination, in between CRV attractions are visited demonstrated by circles linked to the main tourist road. Potentially the CRV could plan possibilities for regional tours, like the Ring of Lakes Tour established by the working group on tourism (Interview 9-2007). A Regional Tour refers to several destinations visited while being around in a target region (Gunn 2002:152). Origins and final destinations are not specified. The regional tours increases tourist activities and adds overnight stays of tourists to the en-route destination pattern as discussed above. This would mean an significant economic impact in CRV's tourism industry. The CRV does has potential for more tourist activities and does posses accommodations. So, regional tours could be market, but the CRV would have difficulties getting the status as a final destination or origin since the traditional tourist zones do have a matured identity as such.

Geographically the CRV lies south of Addis Ababa and north of the far south. From a infrastructural perspective the CRV contains a road network which leads to the south and north where the other tourist zones are located. This road network is an important feature of the CRV tourism industry. The reasonably good and improving road system makes many of the attractions accessible. Various itineraries become possible. For example, the drive time from Addis Ababa to Lake Langano has reduced to less than three hours over the past years. The growth of tourism to the Rift Valley is promising because of its proximity to Addis Ababa and its accessibility. Its geographical location, close to Addis Ababa and the international airport is an asset (HGL & GIRD 2007:8). CRV attractions as Abijata Shalla Lakes National Park and the underdeveloped east side of Lake Ziway, as well as many other sites, can be visited on a daytrip from Addis Ababa. The CRV is close to other tourist destinations as well. such as the Awash National Park, Bale Mountains National Park and functions as a transfer zone between two important tourists zones. The CRV's position is depended upon the other zones, but its location and recent developments shows potential.

Tourism is growing in the CRV, accommodation developments based on international standards are seen on the shores of Lake Langano, in the cities of Asela and Awassa as well as other CRV towns. Besides accommodation developments, tourist services such as boat-trips on Lake Awassa and training of local guides are a result of a growing CRV tourism industry. The CRV is regularly visited as a tourist destination, but rarely as a final destination or used as an origin. Resorts on the shores of Lake Langano are mostly visited, especially by domestic tourists during weekends and holidays (Interview 9-2007). Itineraries which have a final destination in the far south show activities within the CRV. The most frequented tourist sites in the Rift Valley Lakes Basin include the bilharzias free Lake Langano, the hot springs and remnant forest of Wondo Genet, the 'protected areas (ASLNP and Senkelle Wildlife Sanctuary) and the city and lake of Awassa (HGL & GIRD 2007:7). Activities include swimming, bird watching, landscape and experiencing the cultural variety of the area.

The CRV contains numerous attractions which are yet untapped or unknown. The Rift areas has a potential for further development of tourism thanks to its scenery, abundant bird-life, and rich and largely undiscovered culture by European tourists (Hengsdijk & Jansen 2006:23). It is estimated that only about 10% of the tourism potential of the Rift Valley Lakes Basin (RVLB) is currently developed (HGL & GIRD 2007:8). The CRV is the northern part of the RVLB. The RVLB is about three times bigger and stretches out to the far south. It is likely that the percentage of developed attractions in the CRV is higher than 10%. Clear is that most of the

attractions in the CRV are under- or undeveloped. Unfortunately there is no report which is summing up all potential attractions. All stakeholders consulted shared their information on potential attractions. Reports which sum up potential attractions are incomplete and to be found at various institutions which are not working together. Pictures 3.1, 3.2 and 3.3 shows three identified attractions. According to stakeholders (Interviews 2007) those are potential tourists attractions in the CRV. A focussed market research is needed in order to measure the potential of each attraction.

Picture 3.1: Lake Chitu

Picture 3.2: Lephis Waterfall
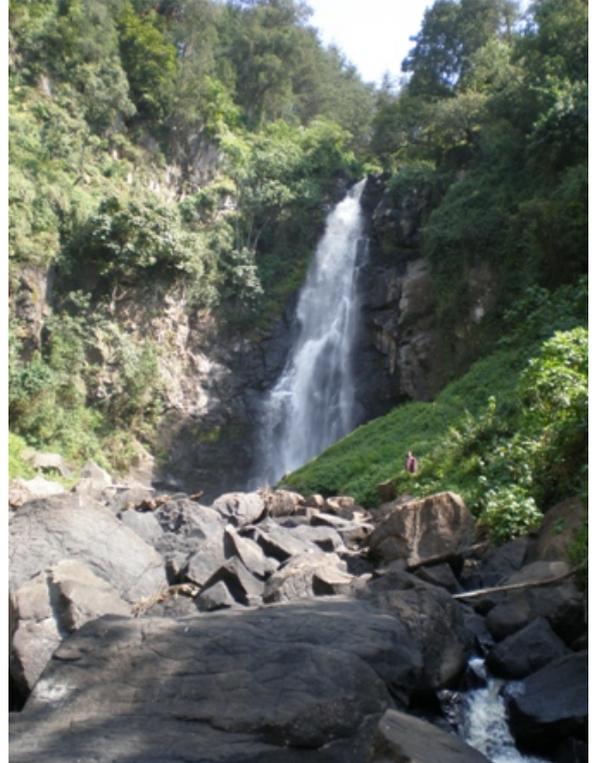
Picture 3.3: Araki Household Producers

Nature tourism can be identified as a third segment of Ethiopia's tourism market after culture and history tourism. Since the majority of the tourists are coming for historical and cultural attractions in Ethiopia, natural attractions of the CRV could enforce this third segment. Ethiopia has experience on nature tourism, but has strong competition on this from neighbouring countries like Kenia and Tanzania. Cultural and historical tourism are the focal points of the Ethiopian tourism industry, but nature tourism can become one of the components of the tourism industry. Especially since the CRV strongest component is the natural attractiveness.

Bird-watching and landscapes aesthetics are the two most important natural attractions. Almost all the attractions studied in this research are related to birds and landscape aesthetics. The various hot-springs in the CRV show potential for spa development. Ready to consume tourist products seems to be the birds. About 50% of bird species in Ethiopia have been recorded in the CRV thanks to its

diverse aquatic and terrestrial habitats in the area (in: Hengsdijk & Jansen 2006:10). Among these species endemic birds are recorded as well.

Besides natural attractions, the CRV possesses also cultural and man-made attractions. Cultural attractions are festivals, cuisine and the Araki Household Producers[11]. Industrial attractions are accommodations and sport-related activities as cycling and hiking. Ethiopian culture can be experienced by developing livelihood tourism[12]. CRV's tourism potential does contain some ready to consume products, but most of the attractions need developments before it can be considered as a tourist attraction or product.

3.5. Sub-conclusion

Ethiopia is an land-locked East-African country with a remarkable history. Ethiopia's political and economical situation seems to settle down over the past decades by processes of macro-economic reforms and ethnic federalism. Relatively and from history an isolated mountainous area, Ethiopia now can show the world its ancient culture and natural attractions. As one of the oldest nations in the worlds and consisting of various climate zones it has interesting tourism potentials. Ethiopia's principal driver for tourism is the rich culture and history. Over the past decades, Ethiopia's natural attractions gained recognition. Most of the tourism potentials are already discovered. It developed Ethiopia into three important tourism zones. Firstly, the historic northern route providing historic and cultural tourism products together with a few natural attractions. Secondly the capital, Addis Ababa, which is serving as an important entrance for international tourist arrivals. Addis Ababa has the capacity to serve tourists as they like. Thirdly the far south pastoralist communities. They are becoming an important pillar of the Ethiopian tourism industry. The Ethiopian tourism industry is supported by recent infrastructural, accommodation development and marketing strategies. Although the Ethiopian tourism industry is consistently growing every year, still its potential suggest that a bigger international market share is possible. Ethiopia's government is seeing tourism as one of the focal sectors in their economic development and poverty reduction programs.

The CRV lies in between two important tourism zones, namely: Addis Ababa and the far south pastoralist communities. It now serves as a transfer zone for tourists on their way to one of the two zones. The CRV does have potential for tourism development, which mainly consist of natural attractions. CRV landscape aesthetics and its bird-life show most of the potential for tourism development. A wide ranch of man-made and cultural attractions could be developed based on CRV's society and its natural resources. Most of CRV's attractions are under- or undeveloped. CRV's attractions has the opportunity to profit from proposed tourism developments by the Ethiopian government and the private sector. Those developments are likely to attract more tourists of which the CRV could profit from when it is connected to the Ethiopian tourism industry. Current conditions and recent developments, such as security and infrastructure, are in favour of developing the identified tourist attractions in the CRV. It is believed that it would have a significant positive economic impact. Until now the value of the natural resources of the CRV have only been calculated in terms of agricultural production or establishing horticultural and floricultural enterprises. It can be argued that the identified tourists attractions, mainly natural resources, also posses an economic value in relation to its

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[11] Household Factories producing traditionally distilled liquor
[12] Living together with local or rural communities

tourism potential. The contribution of tourism to development is diverse. It can go from increased employment opportunities to the rehabilitation of biodiversity as a result of conservation. Both necessary developments in the CRV. Specific tourist attraction developments are needed to fully develop CRV's potential in the Ethiopian tourism industry, preferably based upon market research findings.

So, CRV's natural resources posses a tourism potential, besides its traditional agricultural value. Tourism development is dependent upon enhancements and improvements of marketing strategies, roads, accommodations and water supply and should therefore preferably become part of a larger integrated rural development policy rather than being dealt with as a separate sector. As such, the potential economic value and contribution of tourism to the overall development of the CRV is an interesting strategy for all stakeholders.

Chapter 4. Challenges for Developing Tourism

"An unsolvable problem is not a problem, it is a miserable fact"
(Van Schijndel, 2005)

4.1. Introduction

In this chapter challenges of the current CRV tourism industry and its development are presented. Challenges are divided into economical, sociological, anthropological and institutional issues. After giving the potentials in the previous chapter, challenges form the basis of this chapter. Empirical evidence and examples also come from outside the CRV region in order to clarify and (inter)relate its situation. As is stated in Chapter 2, the CRV tourism industry is connected to other regions in Ethiopia. This chapter gives an useful leg up to building scenarios in chapter 5.

4.2. The Tourism Industry Itself

This paragraph discusses the current CRV tourism industry system. The image of Ethiopia as a tourist destination, competition, marketing, educational level of tourism, the current sector approach, physical infrastructure, security and natural attractiveness are discussed in this paragraph.

4.2.1. The poor image of Ethiopia

An image of a destination is one of the determinants of travel behaviour. The World Bank (2006:2) presented a relation between the poor image of Ethiopia and travel behaviour. The World Bank is stating that only 10% of 400 Africa focussed UK and European tour operators are selling Ethiopian tourism products partly due to its poor image. So, Ethiopia as a tourism destination seems to be contested because of the prevailing image causing an obstacle for a growing number of international tourist arrivals.

Ethiopia's image in the international arena has been one of the darkest since 1974 revolution. "*There is a widely held perception of Ethiopia that equates it with famine*" (Shanka & Frost, 1999:1-3). This widely held perception comes even more clear when the Japanese government presented a feasibility study about Ethiopian tourism development stating: "*The negative image of Ethiopia as a country of poverty, starvation, drought and floods is one of the main impediments to promoting Ethiopia as a tourism destination and therefore, image strategy will play a crucial role for the industry*" (Japanese Embassy in Ethiopia 2007:3). Japan is sending every year more than 1.500 tourists to Ethiopia, this could be more according to the Japanese government. Shanka and Frost researched in 1999 the perception of tourists about Ethiopia as a tourist destination. A majority of the respondents, all potential tourists, indicated Ethiopia as: "*famine stricken, political instable and poor marketed*" (Shanka & Frost, 1999:9). This has to be seen in the light of conventional knowledge. The attention of the media on conflicts and disasters plays an important role in this. The majority of twenty tourists spoken to when in Ethiopia, in 2007, confirmed this as well. As one tourist (Interview 9-2007) put it: "*Before arrival I thought to see a deserted country with hungry people, but that is not reality*." Experiencing the real situation on tour changes tourist perception. The same happened in the research of Shanka and Frost. They showed their respondents video images of Ethiopia. After the video experience, perceptions changed. The

development of a tourism market only can follow when the obstacle of the poor image is removed first (Shanka & Frost, 1999:9, World Bank 2006:3). Ethiopia has a poor image abroad, while tourists who has visited Ethiopia the image is changed or improved. Ethiopia has to conduct a more realistic and sophisticatedly marketing strategy abroad, in order to change its image among potential tourists as well as the general public in Western countries. Since the first disaster became known around the world in the 1980's, the image seems to be more fixed. Structural improvements of the image could mean an essential input to tourism development. As such, it is determining and challenging current tourists flows to Ethiopia.

It is difficult to distinguish the CRV from the Ethiopian image. Differences can be found among international and domestic tourists. For international tourists Ethiopia is treated as one, while domestic tourists do base their perception on different regions within Ethiopia. Domestic tourists do have a poor image of the far east and west of Ethiopia which are not designated tourists destinations. The CRV is mostly seen as a tranquil, green and peaceful region to go on holiday (Interviews 9/12-2007). Especially particular destinations in the CRV are experienced as such, like Wondo Genet Hot Springs and the city of Awassa. As is stated in the previous paragraph, this also has to be seen in the light of conventional knowledge. Domestic tourists do posses other knowledge, experiences and world view than potential international tourists. It means that for the international tourism market the CRV has a challenge in terms of image marketing, together with the other Ethiopian regions. On the domestic market they need to sustain the dominant image.

The image of Ethiopia might averse many tourists to travel to Ethiopia, many western NGO's and foundations did come after this poor image and/or constructed one. Ethiopia seems to be a playground of international development cooperation seeing all kinds of projects founded and/or funded by the international donor community. "*Ethiopia is one of the biggest aid recipients in Africa since many decades and continues to be so*" says the weekly newspaper The Guardian (01-12-2007:10). This money flow from the international donor community brings billions of Euros to Ethiopia. In the period 2000-2006 official foreign financial aid is more than three times bigger than the total value of foreign direct investments (De Vries, 2008:1). Financial aid need to be justified by messages and images, internally and publicly. Keeping the image of an underdeveloped country alive sustains subsidies and financial support from the home countries of NGO's and foundations. Those images are related to the images which potential international tourists do have in mind. International media is strongly linked to the international community in Ethiopia, mostly working for international NGO's. "*Statements from Ethiopian media and authorities is questionable in its truth*" a photographer and journalist (Interview 9-2007) working for the international media stated after visiting a press conference of the Ministry of Foreign Affairs. On the other hand, state-owned media regularly put receiving aid and financial assistance on their headlines. This supports their budgetary problems. The Ethiopian government seems to be proud achieving budget support from the international donor community. As a consequence, they even take donor money into account in advance when annual budgets are constructed, besides the existing Direct Budgetary Support from the World Bank (Fortune 23/30-11-2007:1). *"Actually this is worsening the countries pride"*, says the pronounced critical newspaper The Guardian (01-12-2007). When the number of tourists grows, as is wished by the Ethiopian government, understanding international tourism marketing is needed, as a group of consultants on the Rift Valley already concluded (HGL & GIRD 2007:107). Evidently, it can be argued that there is a relationship between the

image which averse tourists to travel to Ethiopia and the eye-catching, vocal, written, illustrated and expressive presence of the NGO's and foundations. They distribute messages and images of helpful and problematic situations by international media and via their own media. They do have interest to have a particular image. It benefits their intentions financially and in other ways. This is certainly not a tourist image. Surprisingly enough, a majority of the consulted NGO's, especially those committed to tourism, did mention the poor image of Ethiopia as an obstacle for tourism development. But, NGO's are not directly focussing on improving the tourist image. In fact, they are working on the contrary. Another image should be created to capture the ruling image. The ruling image may gradually change. But, probably unintentionally this image is collectively kept by all single contributors, causing aversion among tourists.

Besides the criticality of the image of Ethiopia, there is a process going on which do confirm parts of the image. Among international tourists who visited Ethiopia the image has been changed. It can be argued that this image is not dramatically changed, because tourists also are seeking confirmation of the image they had in mind before travelling to Ethiopia. Problematic issues in the Ethiopian society are explored and recorded by tourists. This could be visiting orphanages, slum areas and destitute farmers. Most of the time they are looking for a local experience and a chance to do 'good'. Tourists take money and goods (e.g. clothes) with them to hand-out where they think it is necessary. This could also be the case on regular destinations like the tribes in the far south, like the Hamar and Mursi. Tourists do hand-out second-hand clothes for people who are used to go out almost naked, which is considered to be a major fascination to visit these tribes. Itineraries of international tourists do show those activities and destinations like slums and orphanages. So, tour operators cooperate on those requests and behaviour of tourists, although four consulted tour operators complain about the country's image and try to improve it. Those tourists, which are a growing number in Ethiopia and in other developing countries as well, are coming after the image they knew from their home-countries. At least, this is not improving the image of Ethiopia as a tourist destination abroad. This seems to fix the image of Ethiopia.

There are efforts to improve the image, but this image is competing with messages and images from other sources described above. The ministry of Tourism and Culture (MoCT) has been making efforts to change Ethiopia's image by running a boost of booths at international tourism fairs, exhibitions, and by using the media. The impact of these activities is still unclear. Inside Ethiopia efforts are taking place as well. As the foreign minister said in The Guardian (22-09-2007:1) on a conference with diaspora Ethiopians: "*Ethiopians living abroad could play a significant role in changing the country's image by taking part in the ongoing economic development endeavours. … We are ready to support Ethiopians living abroad to engage in any sector, such as … tourism.*" Other stakeholders within the Ethiopian society, leisure and tourism industry do show commitment as well. The owner of the first and most popular spa in Addis Ababa wants to create a win-win situation out of this. He says: "*we are known as starving people. With this spa I am focussing on the expatriates community … we try to show that Ethiopia is capable of changing this* (image)" (Fortune 18-11-2007:18). The poor image never was mentioned by governmental representatives as an obstacle or problem for tourism development during this study. Ethiopian authorities do not see the image as an obstacle or problem, but do use public opportunities to spread another image of Ethiopia. They support for example beauty contests and sports events emphasising the positive impact on the country

image. This is mostly publicised through speeches on the event and within Ethiopian newspapers. Positive effects from this might be insignificant internationally. The national effect will be more stronger, probably enforcing the domestic tourism market.

4.2.2. The competition and marketing of the Ethiopian and CRV tourism brand (inter)nationally

From a competitive perspective, Ethiopia has not a very strong position both internationally and within the African tourism market. According to UNESCO: "*Preserving its ancient monuments (historically and ecologically) is just one of the problems the government must tackle if Ethiopia is to compete against the likes of Kenia, Tanzania and South Africa for tourists.*" (The Daily Monitor 28/30-9-2007:3). Internationally Ethiopia is expected to have a market share of 0,03% in 2008. But, when looked at the international tourism development statistics Ethiopia is not growing as anticipated (WTTC, 2007:10). Within the African tourism market Ethiopia has a stronger position. Mostly because it has specific tourism products to offer, like ancient cultures and religious history. Ethiopia's position could be stronger, especially if it could establish an Ethiopian tourism brand. In order to distinguish itself more Ethiopia could focus on the northern historic route (World Bank 2006:11). Indeed, according to four directors of tour operators, the historical northern route can be seen as the main attraction of Ethiopia (Interviews 10/12-2007). The far south with its pastoralist communities could be seen as the second main attraction. Focussing on wildlife, nature-based and adventure tourism a strong competition from other African countries like Kenya, Tanzania and South Africa is expected. Those countries can provide this better because of more wildlife and attractive parks, although Ethiopia's nature is worth visiting as well. Besides that, traditional African tourists destinations can provide extras like beaches and urban tourism. Ethiopia cannot offer beaches and urban tourism as good as others. Looking at this from a macro-economic perspective, Ethiopia does not have another choice than focussing on the historic northern route. The World Bank classified this as the *honey pot* (World Bank 2006:3). Already 90% of the incoming tourists in Ethiopia do visit the historic northern route. Relatively this is the most important destination. The number of tourists could grow, especially when Ethiopia would improve the northern route and exploit it more. It is expected that a strategy that defines products, develops it and improves its delivery will yield improved demand and image results (World Bank 2006:3). The claim of a missing Ethiopian tourism brand is clear. Establishing an Ethiopian tourism brand would strengthen Ethiopia's competition internationally. Preceding visions and effective strategies need to be developed first.

The poor image will be another challenge when it comes to marketing. Improving the image of Ethiopia is one of the major challenges of a marketing strategy. The World Bank (World Bank 2006:3) questions if this poor image could be changed by marketing strategies or private investments. Nowadays, marketing strategies are lacking and private investments aimed to improve Ethiopia's image are rare. What comes first from a national perspective, improving the image or improving tourism products and services? Both should happen. Leadership is needed to relate and balance processes of improving images and enhancing private investments for the sake of a better tourism product and service.

The World Bank gave a budget for a improving image marketing strategy. To this end, five million USD needs to be budgeted by each sector, namely: the public sector, NGO's and private sector (World Bank 2006:12). To plan for this budget will be another challenge. As stated earlier, there is a relationship between the poor

image and the presence of NGO's, a relationship which is expected to be tempted by going for a improved image abroad. Five million USD may not be enough to compensate the emerged impoverished image and to pay for the shift to an improved image. Moreover, the question remains whether NGO's do feel responsible for the poor image or whether they can be held accountable. It can be assumed that the private sector of Ethiopia's tourism industry would like to know which conditions are supporting the five million USD campaign, and what are the direct benefits for their investment or sector. An experienced director of a tour operator labelled the strategy of the World Bank as non-constructive in that sense (Interview 12-2007). To manage this complicated process for a better image and tourism brand, leadership is needed.

Spin-of benefits for other Ethiopian destinations are expected when marketing of an Ethiopian tourism brand is in place. This would be through the development of tourist routes and activities related to the historic northern route. This would mean that CRV tourism will not be in the centre of the tourism industry as a destination and priority. The CRV is subject of and depends on the situation of the historic northern route and the pastoralist communities in the far south, especially when it comes to international tourists. Domestic tourists do visit specific locations in the CRV regularly. From the international and national competitive point of view, the CRV will always play a role in the margins of the Ethiopian tourism industry. This might have consequences for the quality and quantity of developed potentials in the CRV. The challenge is connecting the CRV tourism industry to the national and international tourism market. A CRV tourism brand, products and service development are needed in order secure the spin-of benefits for the CRV out of the development of the already designated tourist destinations in Ethiopia.

In terms of marketing the CRV itself is not publicly advertised. It seems to be that there is not a tourism brand or product to advertise for the whole CRV. As an advisor (Interview 10-2007) within the Ministry of Culture and Tourism, responsible for (inter)national marketing, puts it: "*Besides the historic route their isn't a marketing strategy for other routes, tours, attractions or destinations in Ethiopia.*" Some accommodations and attractions have their own marketing campaigns. The CRV does have a number of potential attractions to market. For example, the CRV does have some cultural festivals which could be linked to the tourism industry. But as a committed NGO employee (Interview 9-2007) stated: "*those cultural festivals are not well centered, marketed or informed in and about tourism*". The director of the regional tourism commission (9-2007), responsible of the CRV tourism industry, says his commission only and rarely appear on national promotion activities. Almost all stakeholders of the CRV tourism industry did mentioned the lack of marketing of the CRV. After establishing a tourism brand and product in the CRV a sophisticated marketing strategy should follow, depending on the national strategy for an improved image and establishment of the Ethiopian tourism brands.

The CRV is becoming commercially less interesting. The private sector is the most dominant sector in the CRV tourism industry. Before establishing their hotels and restaurants they had expectations concerning the prosperity of the business. Nowadays expectations are different from then. From a commercial perspective, the CRV seems to loose its potential. To (re-)gain commercial interest will be another challenge of marketing, once the CRV becomes a target market. As a resort owner (Interview 11-2007) in the CRV said "*Who is going to invest in this desertified location. In earlier days nature was so beautiful. Therefore I invested, but I regret this very much. Nowadays I would invest in other areas in Ethiopia. This is also what I advise colleagues and friends.*" Following with: "*Incoming investors only would invest*

for a couple of years, just exploiting its potential." This can be seen in hotels which are constructed and initiated some years ago. Maintenance and improvements are not made, although tourists do require particular standards. As an experienced tour guide (Interview 11-2007) said: "*This hotel* (Ziway) *has not been improved since it started to operate. Now a lot of things are broken, from little things to the attitudes of employees on the ground.*" And as a director of a tour-operator (Interview 12-2007), working for decades in Ethiopian tourism, stated: "*There is very little understanding, especially among Ethiopian entrepreneurs, about managing a hotel. They forget to use all kinds of potentials, but they slowly do understand that hotels need a cultural touch.*" The CRV is becoming commercially less interesting due to occurring economical, social, cultural and environmental challenges. Most resort and hotel owners do see the CRV in the perspective of other areas. Other regions and destinations in Ethiopia are more interesting for tourism investment, especially for international tourists. As a director (interview 12-2007) of a hotel in the CRV put it: "*The region around Addis Ababa is very interesting, as well as some areas in natural areas north of Addis Ababa.*" Commercially less interesting does not mean the CRV lost its potential. Still, potentials in the CRV tourism industry are left, especially since domestic tourists are becoming a substantial part of tourist arrivals in the CRV. Lodges are often used and hotels are overbooked during weekends by domestic tourists. The interest of domestic tourist in the CRV shows an interesting potential for tourism development. So far, their demand focus on accommodations mostly. The accommodations which implement international standards do want to be linked to the international tourism market in order to fully exploit its potential.

In towns and cities, like Ziway, Sashemene and Awassa, the accommodation sector has different challenges than those in rural areas. The urban accommodation sector has challenges on quality, food security and waste problems. The rural accommodation sector has challenges with earning back their investments, being booked, their relation with local communities, accessibility, and linkage to the tourism market. The accommodation sector needs a supportive framework, but that does not mean CRV's potential will be fully developed. Effort is needed to secure and sustain CRV's potential, especially a CRV tourism brand and product is required.

4.2.3. Educational and professional capacities
The limited understandings of responsible stakeholders are related to the educational capacities within the CRV tourism industry. Shared knowledge about tourism development by all stakeholders contributes to the realisation of common objectives. For example by understanding international tourism standards and the link between tourism and its environment or understanding tourists needs and expectations, especially those of international tourists (HGL & GIRD 2007:107). Knowledge contributes to a proper management. Without a proper management cultural, ecological and social problems easily occur, challenging CRV's potentials.

None of the consulted regional government officials working for a department or commission responsible for tourism in the CRV has any education on tourism and/or related issues. The most close came a director of a tourism commission which was once a geography teacher. The average education of regional governmental representatives on tourism is secondary school. That is even rounded up, because many employees had not finished their secondary education. A group of consultants already concluded this in their report on the Rift Valley, stating: "*low level of professional and trained people in the sector, relying on experience rather than professional training.*" (HGL & GIRD 2007:107). Tourism knowledge comes after

working experience based upon secondary school education. Working experiences partly consist of conferences and workshops on tourism. Through those events tourism knowledge is transferred. Conferences and workshops are organised by committed NGO's and the Ethiopian government in the frame of the Ethiopian millennium. Specific subjects are mentioned during those conferences and workshops. Mostly directors visited those events. During the Ethiopian millennium the federal government focussed on tourism, because of high expectations of incoming tourists and visitors. Tourism authorities, also in the CRV, were prepared for this as a result of federal government's requirements. The preparation can be summarised as requiring hotels and restaurants to be ready to receive as many guests as possible. In areas where tourism plays a significant role in the everyday economy more tourism related educational programs occur and are interconnected according to a director of a tour operator (Interview 11-2007). He claims that similar problems which show up in the CRV were the case on the northern tourist route before. As a result of education required after years of tourism development, for example community projects were established which changed attitudes. Especially problems in the relationship of locals and the tourism industry has been improved simply by teaching them the relevance of having a tourism industry in their region. This is an example of learning from experiences. But, the CRV tourism industry could use the experiences of the northern route in advance. Despite working experiences and education through conferences, workshops and preparing events, tourism knowledge within the CRV is low. As an experienced director of a tour-operator (Interview 12-2007) put it: "*Ethiopia does not have tourism knowledge regionally, let alone locally. They lack advisors, professionals, experts etc. everywhere. Also on the federal level. Those governmental representatives are just doing something. They are not advised or what so ever.*" National and international tourism professionals can be found in the offices of International NGO's and behind private investments.

Ethiopia has a turbulent political history which had consequences for tourism development in terms human capacities. From the seventies of the twentieth century Ethiopian intelligentsia emigrated because of a chaotic society as a result of conflicting political ideologies and economic misery (Van Beurden 2004:19). The repressive Mengistu regime was ruthless in its treatment of both real and imagined opponents. During the so-called Red Terror of 1977-78, government security forces killed thousands of students and urban professionals. Because human rights violations characterized the government's policy toward dissidents, there was a constant exodus of young and educated people[13]. In relation to tourism the emigration of Ethiopian intelligentsia has been important for Ethiopia's current stage of development. The group which is mostly described as The Ethiopian Diaspora in the United Stated of America and Europe did play an important role in the history of Ethiopia and still play that role now, even in the tourism industry. As an Ethiopia expert, owner of an tour-operator and co-writer (Interview 12-2007) of the first tourism policy said: "*The Ethiopian intelligentsia migrated abroad. Among them were many professionals, intellectuals and powerful businessman who could lead Ethiopia to a more prosperous future. In this period the Ethiopian government decided to develop the tourism industry. But back then we were lacking knowledge and power to get a perfect tourism industry.*" Due to history Ethiopia lost human capacities which could lead the country towards a more prosperous future. For example, Kenya and Ethiopia were at the same position when the Derg took over in 1974. The current

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[13] Retrieved from: http://lcweb2.loc.gov/cgi-bin/query/r?frd/cstdy:@field(DOCID+et0057) on 20-04-2008

differences are a consequence of the fact that tourism knowledge left Ethiopia. Nowadays there is still a lack of professionals. Human capacities within the management of the Ethiopian tourism industry are still low as an advisor (Interview 9-2007) of the Ministry of Culture and Tourism stated.

There are some schools and universities who provide an educational program on tourism, but those are not interconnected and the possitive effects seems to be low. A few do approach tourism scientifically, like the Wondo Genet University in the CRV. They have an educational program on eco-tourism and wildlife management. The latter has a strong tourism component. Most of the educational programs are focussing on serving the tourism industry, like hotel and restaurant services. In some regional tourism commissions, educational institutes and in various institutes in Addis Ababa it is possible to follow an educational program for tour guiding. So, around Ethiopia there are educational programs supporting professional knowledge development in tourism. Despite this development, there is not a professional or tourism knowledge network within Ethiopia. Let alone a network which is supporting the sustainability of professional tourism knowledge. Most of the programs are unconnected. Especially in the CRV tourism knowledge is rather isolated, unconnected to each other. As a teacher on wildlife management and eco-tourism of the Wondo Genet University said: "*We have a good program but lack teachers … We do not know Ethiopian tourism professionals.*" Although tourism professional can be found close by or elsewhere in Ethiopia during conducting this research. Reasons for this can be found in the origin of each educational program. Origins of educational programs go back to the singular support and vision of organisations, as it is in Awassa where a German NGO established an educational program. The educational program of Wondo Genet also started on international donor money and program. As a teacher (10-2007) stated: "*we have to find professors who could teach us.*" It comes to the commitment of managements and the demands from students if tourism knowledge is imported. Educational programs funded by NGO's do establish the basics of the program itself, but lack support and commitment towards interconnecting tourism knowledge in Ethiopia. Even governmental managed universities do focus on the graduation statistics of their students, instead of looking to its contribution to the tourism industry and surrounding society. The challenge is networking professionals, intellectuals and tourism knowledge. This would contribute the tourism industry in terms of educational and professional capacities.

In tourism development models and ideologies do play an important steering role. Tourism studies provide various intellectual models and ideologies for tourism development. Based upon a discourse analysis of written documents and interviews with all concerned stakeholders, there is a singular focus on eco-tourism as a model and ideology. Questionable is, if eco-tourism is really used as a model. It turned out that eco-tourism is used as a catch-all term which seems to be hijacked by each interested (HGL & GIRD 2007:40). Within the application, especially during interviews, the concept of eco-tourism development was related to activities which are not showing any aspect of eco-tourism development in fact. As such, some employees of tourism commissions called it practising eco-tourism to talk with local communities about the tourist attraction and their environment, although there were no signs of eco-tourism development strategies behind it. When projects or activities are eco-tourism titled, rarely disadvantages and critiques on tourism developments are given. As soon tourism development activities are eco-tourism titled, critique and disadvantages are omitted. Most of the stakeholders in the tourism industry of the CRV choose eco-tourism led be the dominant discourse. Eco-tourism seems to be an

empty ideology, a catch-all term and often misused. "*It is window-dressing*" said an experienced director of a tour operator (Interview 12-2007). This could develop into misunderstandings. Especially when it is sold as beneficial to local communities. Moreover, there are more concepts than eco-tourism. Preferred is using a clear and concrete model. Every stakeholder, collectively, should be committed to this model. This would benefit the CRV tourism industry more then just the arbitrary and superfluous use of the word eco-tourism by each single stakeholder.

Tourism knowledge in the CRV is lacking for historical reasons, because of processes in tourism related educational institutes, because of a singular focus and because of little understanding of concepts of tourism development, such as international standards. It would be beneficial if the CRV would make use of experiences from the designated tourist destinations in Ethiopia (e.g. historic northern route), enhancing educational opportunities, networking professionals and adequate applications of shared and comprehensive models of tourism development.

4.2.4. Focus on hotels, restaurants and investors within the tourism sector

Hotels and restaurants are in focus by the CRV tourism industry. Rationally, the hotel and restaurant industry is essential for a vital tourism industry. Hotels and restaurants are in focus from the perspective of most of the educational programs as well as from investment and government policies. So, hotels and restaurant are in focus from a systemised perspective. Contracts, condition, controlling mechanisms, construction, land-use policies etcetera are all available for hotels and restaurants. Both heads of regional tourism commissions, which do cover the CRV region, do not have any other working experience or proved knowledge than in the hotel and restaurant industry. They have heard about other concepts and ideas in tourism development, but they only focus on working on hotels and restaurants. They are assigned to do so as a result of policies, which means sustaining an environment which is welcoming hotels and restaurant industries.

Ethiopia is an out-spoken supporter of attracting investors. The expectations of tourism development of the Federal Government of Ethiopia are earning foreign exchange currency and creating employment. Ethiopia's Sustainable Development and Poverty Reduction Program (SDPRP) which is formulated on the request of IMF and the Worldbank consists of applied strategies and responsibilities which the government of a developing country intends to take to tackle poverty. It is the follow up of the Poverty Reduction Strategy Paper (PRSP) which is presenting the strategies and objectives. Ethiopia's SDPRP (2002:115) states: "*The tourism sector deserves … attention … because of its potential of foreign exchange earning capacity.*" Supporting measures taken to attract investors and their money. Concerning tourism, especially hotel investments are announced regularly. Most of the investments announced in newspapers are from non-Ethiopian businessmen. All kinds of nationalities do invest in hotel construction or taking over governmental managed hotels. This raises the question whether revenues from tourism do return to Ethiopia. Partly due to what a consultants report was stating about the whole Rift Valley in Ethiopia, namely: "*Revenues from tourism is not rolled back into the sector, driving further environmental degradation and loss of important attractions*" (HGL & GIRD 2007:107). Regionally, authorities believe that investors will bring benefits. They can build roads and establish basic services like water and electricity. As a

Woreda[14] director (Interview 11:2007) said: "*I should not be the only one concerned with our development. We can share our development efforts with investors.*" Following with: "*For tourism development we need more roads, but also schools and clinics. We can deliver the manpower, but we lack money and goods to build all this.*" So far, no investor has brought the expected roads and services to local communities. This is not expected soon as well. As such, it might not be a reliable and beneficial strategy of development of local communities. Investors can create such development as part of Corporate Social Responsibility[15] (CSR) practices or as part of a Public-Private Partnerships[16] (PPP), but they are not obliged to do so nor are they regular strategies of investors. As such, it seems to be a unfounded and wishful thinking of governmental representatives under current policies.

The critical question is what will happen with identified (potential) attractions. Based on the current situation some attractions could be developed by hotel and restaurant investments. But, the majority of the existing attractions seems to be not well of by those kind of investments. Especially because of the natural component of attractions. Hotels and restaurants are mostly not (obliged to be) conservationist institutions, which is needed in fact. Besides that, most of the attractions are better of with 'en route' positions, because most tourists intend to pass the CRV within one day. This is a position linked to the regular tourists routes, ready to visit for a couple of hours. This situation would mean there is a need for attraction development rather than accommodation development.

The focus on hotel and restaurants distract the attention away from other aspects of the tourism industry. As Gunn (2002:18) stated: priorities on improving economies does not mean only searching for investments in facilities and advertising. Some development organisations give attention to the relation between tourism and society and ecology by executing projects. In the CRV are two projects completed which developed an attraction as such. After the hotel and restaurant industry, most important component where attention is given to is tour-guiding. But, the current focus and private investments does not deliver the expected benefits from a regional or local perspective, and it means no recognition of other vital aspects of a tourism industry.

4.2.5. Infrastructural challenges

Physical infrastructure is an important factor in a tourism industry. In the CRV the roads are convenient for the tourism industry as it is operating now. But, in the perspective of developing potential attractions road construction is needed, because, most of the attractions are off road and inaccessible during raining season. As in the case of Lake Chitu. During the raining season the road to this Lake full of Flamingo's

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[14] Woreda is an administrative division of Ethiopia (managed by a local government), equivalent to a district. Woredas are composed of a number of *Kebele*, equivalent of neighborhoods, which is the smallest unit of local government in Ethiopia (www.wikipedia.com 25-04-2008).

[15] Corporate Social Responsibility refers to a concept whereby organisations consider the interests of society by taking responsibility for the impact of their activities, on customers, suppliers, employees, shareholders, communities and other stakeholders, as well as the environment. This obligation is seen to extend beyond the statutory obligation to comply with legislation and sees organizations voluntarily taking further steps to improve the quality of life for employees and their families as well as for the local community and society at large. Retrieved from wikipedia.org on 29-05-2008.

[16] Public-Private Partnerships refers to a partnership of government and one or more private sector companies on projects that are for example aimed at creating public goods, like in the infrastructure sector. Contracts and subsidies do play a significant role in this process. Retrieved from wikipedia.org on 29-05-2008

becomes a river, hardly passable for any car or hiker according to local representatives (Interview 10-2007). Bad road conditions do harm local communities movements as well. From a tourism industry perspective, CRV's off-road attractions harms the competitive position in relation to other attractions which are more developed. Off-road conditions and the underdevelopment of attractions averse tour-operators to visit most of the attractions. This means that road development has a tourism component. But, road construction can have a negative impact. Road construction from Butajira to Ziway has resulted in the destruction of a attraction, namely: Gara Allati. For this road construction project stones were blasted away from rock-cliffs by dynamite. Those rock-cliffs were identified as an attraction since various bird species were breeding and living there, while feeding in the area. Consulting the responsible authorities and contractors (Interview 11/12-2007), tourism has not played any role and would not be an argument of changing this road construction project.

Inaccessibility could be compensated by developing the name and fame of attractions. Most of CRV's attractions are unknown among tour-operators and tourists. Developing the name and fame of attractions could mean growth of tourist arrivals on CRV's attractions due to the likely increase of demand. In such a situation tour-operators might include CRV's attractions in their itineraries, despite bad road conditions. Both promoting attractions and infrastructural developments are needed to fully develop the potential of CRV's attractions. Moreover, infrastructural development would physically connect the CRV to the Ethiopian tourism industry benefiting local communities as well.

4.2.6. Safety and security within the CRV tourism industry

The vulnerability of the Ethiopian tourism industry, including the CRV, is significant. From national, physical and food security challenge the current tourism industry and its development.

National security issues determine the vulnerability of the tourism industry. Concerns are related to political instabilities and disasters. Experiences in neighbouring country Kenya in the beginning of 2008 are obvious. Due to internal and widespread political conflicts the tourism industry in Kenya broke down. Widespread political tensions rising above the surface of the Ethiopian society could happen as well. Political tensions are already common in the east and west of Ethiopia, resulting into armed conflicts. During the last elections in June and November 2005 political conflicts and tensions occurred in all parts of Ethiopia, although it seems that it did not had a negative effect on the number of tourists arrivals when looked at the statistics (Ministry of Culture and Tourism 2006). Local elections will be held in April 2008. Diplomatic reports do give their concerns for manifestations and protests. Tourists are asked to avoid such events. Conflicts with Eritrea and Somalia and conflicts in Sudan and Kenya could threaten the continuity of the tourism industry as well. As the Japanese government (2007:10) stated in their study on the Ethiopian tourism industry: "*The hotel industry as well as the tourism industry is affected directly by security issues. Deterioration of security can damage the industry seriously. The situation with Somalia, Eritrea and Sudan are the big concerns for the industry at the moment.*" Ethiopian media are reporting about a potential war between Ethiopia and Eritrea and in Somalia. Tourists make suggestions about the security of Ethiopia since it is surrounded by conflict zones in the neighbouring countries Sudan, Eritrea and Somalia (Informal Conversations 9/12-200). Travel advices from tourist sending countries do take those threats also into

account. Already it is advised not to travel to the east, west, far south and far north of Ethiopia. In 2007 a group of French tourists were kidnapped in Northern Ethiopia[17]. Although there are no reports on kidnapping in the CRV, such events within Ethiopia threatens the whole industry. The continuation of political instabilities are of the concern of international organisations and diplomatic community (see for example: www.freedomhouse.org and www.humanrights.org). Besides political instabilities, international NGO's warn regularly for droughts and famines. Tourists are not attracted to such situations. Directly concerned the CRV an Ethiopian NGO (Interview 9-2007) stated: "*the region is never 100% free of cultural and land-use conflicts.*" Claiming that potential conflicts always need to be taken into account. Developments such as industrial investments, road constructions and real estate building. Al those national, regional, local, existing and potential conflicts and tensions do have an impact on the continuity of the CRV tourism industry, making this industry rather vulnerable.

Physical security measures are not respected regularly, let alone being controlled. Already tourists died as a result of little or lack of preventive measures taken. There is no indication or evidence of preventive security measures by CRV tourism authorities regarding tourist activities (Interviews & Observations 9/12-2007). In reality, individual responsibility does cross the responsibility of the operator, hotel or attraction manager. In the weekend, September the 15th of 2007, a tourist drowned in Lake Langano on the beach of a government owned and managed hotel. Their were no life savers or jackets, no boat or any other life saving service available. Local people took the dead body from the lake with their boats (Guardian, 22-09-2007:13). There is little or no contact with emergency services. As in the case of a group of motor tourists in Southern Ethiopia. After an tragic accident one of the motor tourists were transported to a hospital in Nairobi, Kenia[18]. Since is known that the average age of tourists in Ethiopia is above fifty years old and attractions are to be found in remote areas, this may become a critical factor if tourist number grows.

The CRV tourism industry experienced problems with food poisoning. In the weekly newspaper the Fortune this was announced as a result of consulting tourists (2-12-2007). "*Tourists are more vulnerable regarding hygiene then locals are. There is no control on this and there are no measures taken.*" And as the director of a regional tourism commission said: "*Some hotels do have a problem … I can control or close those hotels … I never did such a control ... We control the hotels when they start operating.*" In relation to this, the director said: "*We do not have enough money and employees to control the hotels on this.*" Also Woreda Tourism Commission were complaining about lack of capacity to control on those issues. So, because of a lack of controlling capacity insecurities concerning physical and food security are sustained.

Various insecurities threaten the continuity of the CRV tourism industry. National, physical and food security do make the industry vulnerable. Reasons can be found in political instabilities, lack of prevention measures and controlling capacities of responsible stakeholders. When tourist numbers increase, insecurities may be enlarged and threaten the sustainability of the whole tourism industry. Therefore, those aspects has to be taken into account.

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[17] Retrieved from: http://travel.blog.nl/nieuws/2007/03/01/toeristen-ontvoerd-in-ethiopi on 25-03-2008
[18] Retrieved from:
http://www.telegraaf.nl/binnenland/2495014/Motorreis_in_Ethiopie__kogels_en_val_in_ravijn.html?p=20,1 at 11-2007

4.2.7. Environmental value

The majority of the (potential) attractions in the CRV has an ecological component or are completely natural. In other words, natural areas are the main attraction in the CRV. Most of the attractions are just part of the rural areas, some areas are under a conservation regime. Those natural attractions are also vulnerable. The CRV is one of the most environmentally vulnerable areas in Ethiopia. Relatively small changes in the hydrology may have far reaching consequences for ecosystems goods and services, potentially undermining the sustainable use of the area. Irrigated smallholder agriculture and large-scale horticulture and floriculture are the major water users in the area. (CRV-WG 2007:1). So, environmental sustainability should

Map 4.1. Map of Abijata Shala Lakes National Park

Abijatta-Shalla Lakes National Park

become an important issue for the tourism industry in the CRV. Critical factors occur due to various reasons. Every stakeholder of the CRV tourism industry put their environmental concerns on the priority list. In this paragraph those factors are discussed by focussing on conservation, agriculture, livestock and the relation between tourism and mammals.

The challenges of Abijata Shala Lakes National Parks (ASLNP) are a striking example. ASLNP is an important natural area and therefore a national park. ASLNP was previously known because of its abundant wildlife, scenery and other natural attractions. See Map 4.1. for a geographical overview of ASLNP. Every natural attraction in the CRV has similar challenges as ASLNP, which can be summarised as a continuous deterioration of natural areas. Many researches has been conducted about the history, current situation and future of the ASLNP. In 2007 a new park manager was appointed. He drafted a report (2007) with a summary of all threats. Eleven major threats are identified. Thirty-five possible and liable effects are expected to come out of those major threats. Threats are related to the conservation management, settlements in ASLNP and water supplies of Lake Shala and Abijata. The latter is critical, a major threat is the already saline water. Partly due to water use of the governmental managed Soda-Ash factory on Lake Abijata. This is a common sense of concerned Ethiopian and International NGO's. The conservation management lost all its capacities due to shifts at thelevel of authorities, lack of financial and intellectual support. Settlements are using the resources of the park causing serious damage to the park. In collaboration with the Ministry of Water Resources of the Federal Republic of Ethiopia consultants wrote a critical report on the Rift Valley where the CRV and ASLNP are part of, stating that: *"Wildlife in the RVLB* (Rift Valley Lake Basin) *faces many serious constraints that have become major threats to the continuation of protected areas … Poor management of protected areas: The protected areas management in the RVLB lack the necessary human, material and financial resources to meet conservation objectives. Properly trained wildlife management staff are greatly lacking in the protected areas. Budgets for conservation and protection work are very limited and the small amounts of income from tourism are not cycled into wildlife conservation. Material resources are*

also extremely limited. None of the protected areas has an active management plan" (HGL –GIRD 2007:80). All problems are growing hand in hand causing even more deterioration.

Many influences within ASLNP can be identified. Such as management, tourists, investors and rules and regulations. In 2007 an investor signed a contract with the responsible authorities to exploit the park free of charge (The Reporter 06-10-2007:1). Real estate development seems to be the main objective, although sharp tongues do say it could be money laundry because of the unlikely amount of 1,4 billions USD. The real purpose could also be the withdrawal of minerals of this volcanic place. Local communities are present all over the park. Those local communities do want to profit from the resources, tourists and incoming investor. Profiting from the latter by compensation for resettlement. Children of those communities do receive begging money from tourists and sell handicrafts to them. Until the arrival of the investor they exploited the richness of the national park by agriculture, livestock, killing trees for charcoal production and distracting sand for construction purposes. Because of all those interests from the local communities it is even more difficult to resettle them. Local communities even enhanced their exploitations since the investments is announced in order to benefit as much as possible within the time left. There is no supervision present on all this, only numerous studies has been done. The current park manager is informed by those external researchers. The park manager claims to be less informed by the conservation system of the government than by foreign researches. That is remarkable since governmental authorities are responsible and owning the park. As a committed Ethiopian NGO stated: "*The federal government is desperate of earning money, foreign investments. They are neglecting, ignoring and do not understand ecological effects ... EPA* (Environmental Protection Agency) *cannot do anything at this moment, they are withdrawing and responsibilities are meant to be shift to the private sector. The EPA has a lack of financial, human and physical resources.*" This means that the focus of responsible authorities results in a declining value of tourism products in the CRV. This seems to become true in the ASLNP case. "*We are in a transitional phase towards the ending of this park and upcoming investments*" says the park manager (Interview 12-2007). The park manager continue saying: "*From the beginning there is no appropriate management system in this park. There is still none ... The only activity we do in the park is patrolling. This is of course not effective. Even this patrolling is not based upon a system.*" The management is lacking capacity for a proper management. Existing insecurities about the investment for locals and the management and the exploitations of natural resources in the park by local communities is leaving the ASLNP in a 'dead lock' situation.

Some challenges need to be specified since other natural attractions are faced with it as well. The livestock in natural areas is a major problem. The Daily Monitor (26-09-2007) wrote: "*The main reason why the closed areas remain pitiable both in number and size (particularly size), is due to our style of management of our livestock. Freely roaming domestic animals within the country eke out their feed by souring every part of the land that has even a semblance of grass to graze upon. The drier the season the greater the onslaught. Causing widespread deterioration of the agricultural and grazing lands.*" For example in the rural area of Aje, which lays between Lake Awassa and Lake Shala, contain almost 120.000 inhabitants and 321.787 livestock population according to the Woreda director (Interview 10-2007). This means 2,7 livestock per head of the population. In the complete CRV, urban and rural, livestock is estimated on 1.5 per head of population in an highly populated

area. The majority of the livestock are space, soil and water demanding cattle's which requires a high demand of soil quality. Many reports about the relation between population, cattle, livestock and soil value do write about soil quality degradation. Livestock has an unimaginable strong socio-cultural value for local communities, making it difficult to discuss. Livestock management would bring substantial benefits for the environment. Fertilisation practices need to be taken into account as well. Farmers and governmental authorities are willing to introduce fertilisers without assessing the impact in advance (Interview 10-2007). In general, agricultural management would benefit CRV's tourism potential

The use of resources on attractions and its surroundings is another challenge. In the case of Gara Allati, not local communities, but the government is using the resources of the attraction. This case has been presented earlier in this chapter. From this point the attraction will be described regarding its environmental value. Gara Allati means Big Birds Cliff in local language. This rock-cliff is laying 5 km from Ziway and its main road. The rock-cliff is part of a rock formation which has similar rock-cliffs around a valley. On the cliff a settlement of predator birds (Rüppels Vultures) is the main attraction. In the nearby surrounding mammals as olive baboons, different bird species and sceneries could attract tourists. From the perspective of tourists, birdwatchers, biologists and ecological focussed stakeholders this is an attraction with huge potential. At the same time the rock-cliff provides stones for road construction. The contractor will use dynamite to blow the rock-cliff and take away the stones. According to the only ecology focussed Ethiopian NGO this attraction certainly will disappear.

Another case is Lack Chitu, which is a natural attraction in threat. Lake Chitu has a population of thousands of lesser and bigger flamingo's. These brids feed in Lake Abijate, but breed on the islands of the volcanic Lake Shala. Since the serious reduction of their main feeding and breeding areas, the population increasingly moved to the smaller Lake Chitu in search of food. The population or parts of it, only leaves for an overnight stay in Lake Abijata. Lake Chitu has some fertile shores left, partly due to incoming hot springs. But, the shores are becoming empty because of trees cutting and the grazing of cattle. The trees are used for charcoal production

Picture 4.1. Shores of Lake Chitu – Hot spring

which has become a popular alternative income generating strategy. The environment of Lake Chitu and its hot springs are overused by livestock. Hot springs are the only remaining fresh water source left since the Bulbula into Lake Abijata dried up. The fresh water supplies of the hot springs are used domestically and by

livestock as can be seen in picture 4.1. This hot spring is cultivated as a water reservoir for cattle to drink from.

The population of flamingo's is chased by children which are throwing stones and is disturbed by cattle which are directed through the water on the shores. A CRV biologist (Interview 12-2007) is expecting that the population of flamingo's will be reduced soon. Knowing that this location is mentioned as a tourist attraction by all stakeholders, management is needed. Starting with livestock management and regulation for the use of natural resources according to a employee of an international NGO (Interview 12-2007). Theoretically, tourism could stop this natural degradation and promote the adoption of another income generating strategy, especially when it is closely linked to the surrounding community. Experts on all aspects of this attraction need to be found as well. Officially Lake Chitu is part of ASLNP, but the park manager has not any monitoring system or what so ever on Lake Chitu. Besides the park management, no other form of policy or project can be seen from responsible and committed stakeholders, although local authorities and representatives claimed to have replanting trees policies and monitoring systems in place. Similar problems do occur on other natural attractions, without any form of policy behind it. Nature based attractions might not be gone already, but in terms of policies and projects they are in threat, they are outlawed and ignored.

The relation between birds, mammals and the tourism industry is tense. Already the wildlife management in ASLNP is criticised. In non-protected areas challenges are present as well. CRV's strong potential are bird areas. In addition, BirdLife International has identified eight Important Bird Areas in the RVLB, most of which are located on the lakes. When areas are threatened by deforestation, activities of local communities, saline water supplies and no management bird life is under threat as well. The so called Important Bird Areas does not contain legal requirements for protection (www.birdlife.org). As such, birds are outlawed. Even more so when stakeholders do not recognise or develop the potential of bird watching tourism.

Hippo's in Lake Awassa and Olive Baboons around Lake Langano are directly threatened by the arrival of tourists. A resort on Lake Langano has to close for two months after Olive Baboons became aggressive (Interview 11-2007). They were fed by tourists first. After restrictions were announced by the resort, the Baboons came inside the restaurants to claim their portion as they were used to get. When they did not received anything they started to become aggressive to personnel, guests and local communities. The resort killed two male Olive Baboons and their family members became quiet. On Lake Awassa there is living a population of Hippo's, it is their natural habitat. Other habitats are not available nearby. Tourist who do want to see those Hippo's can rent a boat. Since the boat company bought motors they can provide quicker and more comfortable services then in case of rowing. The helmsmen are uneducated and in their whish to please the tourists, they approach the Hippo's to close without switching their engine off. Hippo's are becoming aggressive, afraid and more shy. As the boats men are saying, the population of Hippo's are now migrating more around the lake and are more difficult to spot (Interview 09-2007). There are concerns that the Hippo's stop breeding since their livelihood is threatened. None of the responsible stakeholders have taken any measure according to the local boat association and tour guide (Interview 09-2007). So, wildlife and tourism in the CRV seems to be in need of management when tourists and mammals face each other.

The CRV could loose its natural attractiveness because of killing trees, disappearing mammals and birds, (over-)exploited soils by locals and cattle, overpopulation, higher demand of water then there is available etc. Managing these problems by introducing a well designed set of mitigating measures is a major challenge and should be central in any development program. Poor management is central in this paragraph. Managing the complicated reality of CRV's natural environment will be one of the major challenges for developing its tourism potential.

4.2.7.1. Water Consumption and Tourism in the CRV

In terms of hydrology the CRV is becoming vulnerable. Mostly because of increased water use by agricultural smallholders, horticultural industries and other industrial projects. Together they claim more water than is available on the long run. This is concluded in almost every research conducted. The size of Lake Abiyata, one of the Rift Valley lakes harbouring important waterfowl, has been reduced by 50% in 30 years. Consequently, salinity and alkalinity levels of the lake increased. More importantly, there is the danger that the only fresh water body in the CRV, Lake Ziway, becomes smaller and more saline as a consequence of reduced water inflow from the catchment areas of the lakes where water is increasingly used for irrigation. A reduced water inflow of Lake Ziway impacts the outflow of the lake via the Bulbula river towards Lake Abijata. Ultimately the reduced inflow of water may turn Lake Ziway into a terminal lake like Lake Abijata is now. Lake Ziway will become saline and unsuitable for domestic and agricultural use (CRV-WG 2007:1). To prevent this, irrigation practices of smallholder farming will have to be adjusted first. Bigger industries do use their own calculations, be it that their demand is relatively less than smallholder's use of water. On the other hand, smallholders would say they have their own rights regarding water supplies on which their survival strategy is depended. Clear is that water supplies are a critique issue in the CRV for agriculture, industries as well as domestic use. Water is a limited resource which can be depleted. Further competition for the limited water resources is also expected between different economic sectors, e.g. between tourism and agriculture and between fisheries and irrigated agriculture (CRV-WG 2007:2). Calculations of CRV's industrial enterprises are not directly available for having an overview. In whatever case, as a group of consultants (HGL & GIRD 2007:40) on the CRV stated: "*Decision making on development interventions must be based on the impact on the water resources. To be sustainable there must be a return to a balanced water resources / water use regime*". So, the proposition is that tourism development should therefore be introduced carefully in order not to worsen the water supply crisis at least. An intelligent system of balancing and relating all CRV industries in terms of water use is lacking.

In relation to tourism development a particular overview concerning water consumption in the CRV is needed. As an experienced director of a tour-operator (Interview 12-2007) working for over thirty years on tourism in Ethiopia put it. "*Tourists do have a negative relationship with water supplies in the CRV. If the number of tourists would double in the Rift Valley there would be a serious problem concerning water due to the high demand of water tourists normally consume, knowing the existence of the already saline lakes.*" Tourism demands a particular amount of water as well as households, agriculture and other industries in the CRV. Governmental authorities, like Ministry of Water Resources and Culture & Tourism, do not have or use any calculation so far which can relate tourism development to water supplies. The majority of tourism overview reports on Ethiopian tourism do not

mention the relation between water supply/consumption and tourism development. Various stakeholders stated to be working on this. Quantifications of water consumption by tourists are difficult to find in literature. Quantitative scientific research on the relationship between fresh water use and tourism is limited. Some data is available about water consumption of tourists. For example, Average water consumption by foreign tourists in the Mediterranean region was assumed to be 250 liter per tourist per day in 1984, with water use in hotels of the luxury class reaching up to 600 liter. Water consumption for campsites in the same region was calculated to be 145 liter (Gossling 2001:180). Another document shows that in Mallorca The average tourist consumes 440 litres per day, and luxury tourist 880 litres[19].

Figure 4.1.: Water Consumption by Hotel Guests

Water consumption by hotel guests
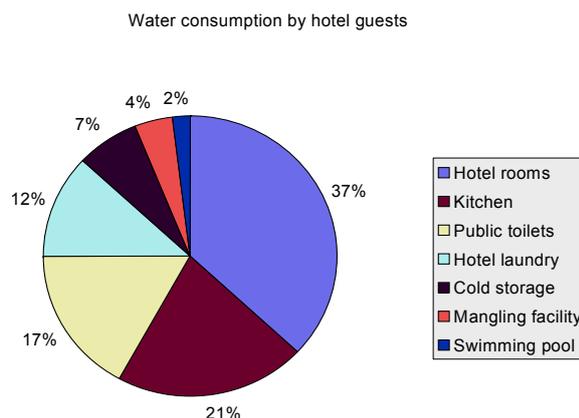
Translated to a likely but fictitious situation in the CRV, based on 10.000 tourists with an average stay of two nights, tourists would consume 8.800.000 litres per annum[20]. If tourist numbers and nights spend in the CRV would increase, so will this estimation. These are total figures of (in)direct water consumption by tourists. So, it can be argued that water consumption by tourists have a significant impact all over the world, especially in areas with limited water resources. In addition, uncontrolled and unregulated tourism industries as in the CRV would increase the impact of water consumption by tourists causing invincible negative impact on water resources. It does have a significant impact on groundwater levels as well. For example, 10.8 million tourists visited the Balearic Islands in 2000, an increase of 16.4% since 1997. The growth in tourism led to a decline in groundwater levels of 90 meter between 1975 and 1999[21]. The same document shows a figure on water consumption provided by Intercontinental Hotels and Resorts. Figure 4.2. gives an indication of the water use of an average hotel guest. This figure can be used to see on which sections water is consumed per hotel guest. The figure does not show the water consumption of the hotel itself. Irrigation of gardens and in some cases golf yards are not included. The tourist accommodation sector traditionally consumes the vast majority of water resources at a particular tourists destination, other tourism sector as tour operating consumes less. From an environmental perspective as well as commercial appeals, accommodations could decrease the impact of water consumption by adopting Environmental Management Systems (EMS) or the sector could introduce Green Globe Certifications (see for example: Meade & Gonzalez-Morel / Hagler Bailly Service Inc 1999). Another document presents the water use of three full service hotels in Santa Fe, New Mexico, USA. The hotels , posses 526 rooms together and provides swimming pools, saunas, restaurants, and cocktail bars. Together they consumed 170.5 acre/feet in

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[19] Retrieved from: http://eea.eionet.europa.eu/Public/irc/eionet-circle/core_set/library?l=/material2/facts/wq02d_water_tourism/_EN_1.0_&a=d on 04-06-2008
[20] 440 x 2 x 10.000 = 8.800.000
[21] Idem as footnote 19

total annually. In the same city, six full service restaurants consumed 5.9 acre/feet, or 160,200 gallons per month in average annually (Planning Division of the City of Santa Fe 2001:7). Guesthouses and restaurant with limited service are believed to use half, or less than half, of those figures. This quantifications of water consumption by tourists can be used by environmental research on the relationship between industries and water resources in the CRV. A rough estimations about water consumption of hotels in the CRV can be made using the figures of Santa Fe. It is likely that in the research area 50 hotels are providing full service. This would mean that together they consume 2841,666 acre/feet[22] water in the region. This is 3.505.555 m³([23]) in total annually. This figure might be not adequate or realistic because of differences in occupancy rate and number of rooms, but it does give an indication and can function as a guideline. In search of realistic and adequate data means the accommodation industry in the CRV itself has to be researched on water use. A hydrological prospectus should be made in relation to all industries, including tourism in the CRV. Knowing the criticality of water resources in the CRV on the long run, adequate quantitative research is needed in before tourism development programs are established.

Solutions for the problematic water resources are difficult to implement nowadays. "'*Quick fixes' are unavailable in the basin, because the opportunities for expanding irrigation are limited, there are no large 'unharnessed' power sources, and land and water resources are already over-committed. Innovative investment opportunities (e.g. tourism, floriculture and crocodile farming) are directed towards niche markets, and cannot be replicated widely. They will have only a marginal impact on the growth of the regional economy in the future*" (HGL & GIRD, 2007:16). It seems that tourism development already is contested in terms of its contribution to the recovery of water resources, especially short term contribution are doubtful according to these consultants. Remaining question is, can tourism be an alternative source of income for local communities (which do use the majority of water for irrigation) and become less water depended by leaving their agricultural activities? The majority of local communities, mostly smallholders, are seeing tourism as an additional source of income rather than alternative. All local communities asked said they would not give up their agriculture and livestock for tourism. As an community leader (Interview 11-2007) said: "*we have unemployed people, they can work for tourists.*" Probably other income generating strategies will be given up rather than making tourism the core business. So, the intention and strategies of local communities does not show potentials for rapid tourism development since smallholders' agricultural activities are not likely to change. Therefore, any program for tourism development should include adequate measures in relation to other water dependent industries.

4.3. Social and Cultural Issues

In this paragraph a presentation of social and cultural challenges are given. Especially the interaction and relationships between tourist and hosts is in focus. Traditionally, the relationship between hosts and guest is an important factor in tourism development.

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[22] (50/3) x 170,5 = 2841,666
[23] Retrieved from: www.convertworld.com on 30-06-2008

4.3.1. Hospitality, perceptions and the interaction between locals and tourists

Tourists do question the hospitality of Ethiopia. In relation to the national promotion where the ancient hospitality plays a role, this is a delicate issue. There are various reasons for the questioning by tourists, mostly related to their daily experiences with locals. Cheating, begging, throwing stones and asking for financial support are mentioned by international tourists in Ethiopia and the CRV. Various explanations can be given from history and the local communities point of view. In general, the relationship between hosts and guests is at stake.

Begging of Ethiopians is of growing concern. An Ethiopian NGO conducted a research on begging in Ethiopia. They initiated this research as a result of a growing number of beggars in the streets of Addis Ababa. Nowadays, on every corner in the capital centre beggars are present. The research concluded that Ethiopians do have a beggar attitude inspired by a culture of giving. Begging is becoming a business, even a business of disability. Bodies are molested to become 'beggar-worthy'. A regular income of a 'professional' beggar is 100 birr a day, which is ten times more then the average income. Begging can grow due to a culture of giving, encouraged by religious representatives obliging people to give alms. Encouragement could also come from other sources. "*Donors are proud pouring money into Ethiopia in the form of emergency or long term development assistance. This has also led to an aid-dependent mentality*" (The Guardian 01-12-2007:10). According to the research of the Ethiopian NGO the beggar mentality is developed as a result of sources who told Ethiopia is poor. "*This cannot be real when we see our resources.*" Begging is becoming part of the Ethiopian society due to various reasons. According to the Ethiopian NGO this growing begging industry is not necessary and should be taken hold of. Creating awareness through educational programs about seeing Ethiopia's development opportunities, instead of focussing on disabilities would challenge this problem[24]. Recognising the difference between poor and rich instead of ignorance reflected into perceptions of the other could tackle this growing problem as well According to the research of the Ethiopian NGO on beggars. (The Reporter 22-11-2007). Various public discussions on begging can be noticed in newspapers, titled as: "*Urgent National Homework*" and "*Do People Have the Right to Beg*" (Capital 21-10-2007:43, 16-12-2007:2 & Fortune, 2/9-12-2007). And as an experienced tour guide (Interview 11-2007) said: "*Begging is definitely not part of the original Ethiopian culture.*" The Ethiopian government seems to reject widespread begging as well. This became even more clear during the millennium festivities. The streets were cleaned from beggars as a result of governmental orders (Interview 9-2007). As a result this tour guide initiated a educational program on schools on tourism and hospitality. The current discussion within the Ethiopian society is noteworthy, because Ethiopians do see it as a taboo to criticize begging. As this journalist (Interview 10-2007) does want to see Ethiopia: "*We are the most welcoming people on earth. We give non-Ethiopians effusive greeting when we see them.*" Begging in Ethiopia is a delicate topic which will become even more delicate in the light of tourism development.

With an upcoming tourism industry two factors will be enlarged. Firstly, the believe of being poor and secondly the culture of giving which seems to be accepted among tourists as well. Both conditions will let the group of beggars grow. Most of the tourists do live a rich life by touring with 'Landcruisers' and sleeping in expensive hotels. Local people are becoming more and more aware of the gap between poor

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[24] Retrieved from: http://www.africanews.com/site/list_messages/16405 on 22-12-2007

and rich. This could encourage begging, especially on tourists locations. Especially children (Observation 9/12-2007) run to tourists shouting "*You, you, money, money.*" On various places this is becoming more and more an acknowledged problem. As the Daily Monitor (10-2007:5) said summing up the problems of the tourism industry after consulting tourists: "*Complains are often notices about widespread begging by children.*" This is not a characteristic incident. This is part of a structural event, habitual process, which is becoming part of the society. Especially around tourist activities. Most of the tourist do give away on this call (of attention), handing out money and goods. Begging is not taken hold of by surrounding Ethiopian people as well as tour-operators. They describe the behaviour of the children as playing around. Asking them about a possible relationship between a negative visitor experience and widespread begging they strongly disagree (Observations and Informal Conversations 9/12-2007). This creates an environment where future tourists are challenged with. There is a growing gap between the experience of tourists and the intentions of Ethiopian people, the host. It is clear that begging is becoming part of Ethiopian society. Tourism seems to enforce begging practices, which is clearly not a sustainable contribution to CRV's development. The culture of giving among tourists is present and awareness of the gap between poor and rich is growing.

Tourists do question hospitality as a result of begging and welcoming habits of Ethiopians. As one tourist (Interview 9-2007) put it: "*They are bothering me with begging. But, they do not understand that.*" Among tourists are problematic experiences, especially concerning their interaction with local children. According to their experience children ask attention continuously, beg for money and throw stones (Observations and Interviews 9/12-2007). As an owner of a resort on Lake Langano said: "*My guests are arriving at my resort with holes in their cars. I have many difficulties to please the local communities.*" Compared to begging, children throw stones irregularly. The effects are the same, namely: among western tourists the image of Ethiopia as an hospitable country is challenged. Like bicycle tourists advise each other on an online Dutch forum[25]: "*if you want to avoid those stone throwing children, take public transport through the Central Rift Valley straight to the Arba Minch.*" This is a town south of the CRV. And a Norwegian couple travelling around in the CRV (Interview 9-2007) said: "*If I could choose between Kenia and Ethiopia I would choose Kenia although it might be less attractive, just because of the begging and tiring people.*" This is an experience which many western tourists have during their stay in the CRV. Domestic tourists do have partly similar problems, although the amount of problematic interactions is lower. Especially in rural areas, domestic tourists do experience begging and stone throwing children as well. According to domestic tourists it has to do with their presence of richness (Interviews 11-2007). Domestic tourists has the ability of explaining such situations, while international tourists are less able to handle such situations. Besides the entrances areas of hotels, hospitality need be (re)produced and renewed in other areas. Otherwise Ethiopia would loose part of its potential due to messaging the feeling of being unwelcome.

The perception of foreign visitors is becoming more tensed since travel restrictions are becoming a more important tool for Western countries. How difficult it is for an Ethiopian to travel to Europe or America, as easy it is for Europeans and Northern Americans to travel to Ethiopia. Travel restrictions are high for Ethiopians,

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[25] Retrieved from: http://www.wereldfietser.nl/phpbb/viewtopic.php?t=597 on 10-01-2007

HIV/AIDS testing, invitation letters, references, time schedules, reasons for travelling etcetera are checked. This is becoming more and more known in the Ethiopian society, especially within towns and cities because they relatively inhabit more educated people which desire to travel. Tourism is becoming more and more visible within the Ethiopian society, making them more and more aware of the differences. As is known in sociology, incoming groups which are inferior or superior in terms of privileges, cultural habits, norms and values are making natives aware of being different. Awareness of differences could grow out of hand as is known in other tourist destinations, causing problems in the interactions between tourists and hosts.

Taking pictures are one of the most typical habits of tourists. It causes problematic situations because of a misunderstanding of perceptions, especially in rural areas. The perception of local communities towards taking pictures is shaped through history, when employees of aid organisations arrived. Aid organisations are nowadays described as NGO's. According to an experienced director of a tour operator (Interview 12-2007), this is dating back to the time of the first disasters, conflicts, international NGO and media occurred and arrived. They took pictures of poor situations in the region. They explained that as a result of exposing those pictures money and solutions for their problems would come, commonly known as fund-raising and development projects. Since local communities did not witnessed the necessary developments they start thinking the pictures were sold back in the home-countries of those NGO representatives and that the money earned was kept by them. Pictures of their livelihood and environment are still taken, but their livelihoods and environments are nowadays recorded by tourists. From a local perspective employees of NGO's are similar as international tourists, locally referred to as foreigners. The difference is that international tourists do not promises money and development after taking pictures of their livelihood and environment. Local communities still do not witness the necessary developments and still think that those foreigners sell those pictures back in their home-countries. "*Those foreigners keep the money and do not send projects*" a local representative (Interview 11-2007) explained this perception. This misunderstanding grew during a process of underdevelopment and a regular inflow of foreigners. This misunderstanding leads to various situations. Locals ask money for every picture taken in order to claim benefits from the earliest stage. According to a tourist guide misunderstandings are decreasing, but still it should be taken into account (Interview 11-2007). Typical habits of tourists, such as taking pictures, can trigger unexpected reactions based on historic arguments. Information and education on both sides, tourists as well as local communities, could increase mutual and reciprocal understandings.

In other regions of Ethiopia are also tourist experiences with children and local communities. On the historic northern route similar experiences were measured. Particular educational programs were established among local communities (Interview 12-2007). After a while this paid of and tourists where not disturbed and started to establish relationships with local children and communities. Still many other problems occurred like students asking for sponsorships for example. In the east of Ethiopia, where no regular tourism exists, visitors say they experience the real Ethiopian hospitality (Interview 11-2007). It can be argued that tourism enforce problematic interactions, misperceptions and misunderstandings. The interaction between tourist and local communities are complex and somehow problematic, but solvable. Particular positive conditions can be enforced, while problematic situations can be avoided by information and educational programs. The interaction have to be monitored. Visitor experience and visitor satisfaction surveys can provide valuable

information from a tourist perspective. It all will contribute to prevent the CRV tourism industry from worsening hospitality practices.

4.3.2. Willingness to receive tourists and related expectations

Despite the tense relationship as stated earlier, Ethiopians do not prefer tourists to leave their area. Instead, everybody is welcoming tourists. Asking Ethiopians and their representatives if they are willing to receive tourists everybody says yes (Observations & Interviews 9/12-2007). Willingness to receive tourists is clear, but particular conditions of receiving tourists are announced as well. Conditions are related to the distribution of benefits, especially among rural communities. As a representative of a rural Kebelle (Interview 10-2007) puts it: "*Tourism helps to grow Ethiopian economy, we would like to join.*" Some local representatives do see a market for selling food and handicrafts. A majority of local representatives do want to see tourism development related to building schools, road construction and employment (Interviews 10/12-2007). As another local representative (Interview 11-2007) mentioned when asked how tourism could benefit his community: "*we need a school and a clinic. We want an NGO to do that. We do not trust the government.*" One director of the regional tourism commission (Interview 10-2007) said in relation to this: "*we are waiting for an investor or a NGO who could solve our problems.*" So, benefits should be brought by tourists, investors and NGO's according to CRV's society and its representatives. As one tour guide (Interview 11-2007) said: "*local communities do not see the difference between NGO's and tourists. They just expect to get something when they arrive in their environment.*" Contributions by local governmental bodies seems to be limited. Mistrust towards governmental bodies seems to be genuine. What it says is that in the CRV conditions of tourism development should be related to predefined benefits for local communities.

Other options for the distribution of benefits are not clear from a local perspective. On the question what they would do if tourism would not bring those benefits to the community he said: "*We will try to find out why and try to solve it. We will be disappointed, but also patient. Still we have our income from agriculture and livestock although that is becoming difficult every year*" Giving up their core business would be the last step to take. Local communities do want to continue their regular income generating strategies like agriculture, although they acknowledge that the natural environment needs to be protected. They prefer better farming practices which would decrease the vulnerability of their crops rather than decreasing agricultural activities in terms of scope and range. They see tourism as an extra or additional income generating strategy, rather than alternative. Particular projects and exchange of goods are central when it comes to receiving tourists. Some communities do have experience with receiving tourists. They describe their experience with tourists as a relationship where the exchange of goods is central (e.g. tins, ropes, coins, beverages etc). As a representative of a rural Kebelle (Interview 11-2007) said: "*when I was young I got tins from tourists. I was very happy.*" Besides that, joining tourists on their trips in the surroundings is mentioned as well. The willingness of receiving tourists is related to their expectation of the distribution of benefits. It can be argued, knowing current visitor experiences, that when hosts do not receive the expected benefits, the interaction with the guest may become problematic.

Local communities lack knowledge and capacity to serve an upcoming tourism industry, although they are willing to receive them in relation to their expectation of being a beneficiary. All rural communities consulted stated that their contribution to a

tourism industry will be manpower. As a local representative (Interview 11-2007) put it: "*We can build roads and work in restaurants and hotels, we only lack money and knowledge how to manage everything.*" Expecting benefits for their livelihoods will become more difficult when knowledge and capacity to achieve those are lacking. In a sustainable tourism industry local needs and requirements should be taken into account. Lack of knowledge and capacity could lead local communities into drastic oppositions and approaches towards tourists.

Still, from a local perspective tourists are the uninvited guest consuming their environment. Locals are willing to receive tourists, allowing them to consume their environment (claiming or gazing), under the condition of receiving benefits in return. Especially rural communities are willing to receive benefits of all kind. They prefer to see those benefits in an additional income generating strategy. Manpower can be offered in return.

4.3.3. Upcoming sex and/or romance-tourism

An upcoming aspect within the Ethiopian tourism industry is sex- or romance tourism. This means tourists travelling to Ethiopia to have paid sex or romance. This industry grew over time. Ethiopia has experiences with sex-trade emigration to surrounding countries in Africa and Arabic world as stated in the report of the US State Department Trafficking in Persons (US-SD TIP). Ethiopia is a source country for men, women, and children trafficked for the purposes of forced labour and sexual exploitation. Rural children and adults are trafficked internally to urban areas for domestic servitude and, to a lesser extent, for commercial sexual exploitation (US-SD TIP, 2007:98 & The Reporter 13-10-2007:22). In the media several times the practices of sex tourism are discussed, from Kenyan experiences to the relation with the HIV/AIDS epidemic (e.g. Ethiopian Herald, 03-10-2007:3-7). Occasionally Europeans are travelling to Ethiopia for the purpose to get sexual contacts with Ethiopian women according to a European tour guide (Interview 12-2007). Internet is playing an important role in this. There are websites set up for Ethiopians dating travellers, strongly linked to the sex-industry. The same tour-guide referred to an unknown website which is offering travellers minor girls and boys for having sex. Those kind of offers are not publicly given. It means that these kind of tourists will find their own way in the margins of a tourism industry, but not without the help of Ethiopians and its society. It is believed that when it is possible in a society to sexually exploit children, tourists will come after it and in some cases a tourism industry will be linked to it. Global March[26] states in a country report on Ethiopia: "*A study carried out by the NGO FORUM revealed that in the Mercato area* (Addis Ababa)*, hotels, bars and landladies, most of them former prostitutes, are engaged in renting rooms to young girls for prostitution. The age of girls engaged in prostitution in this area is reported to be between 15 and 18 years. In October 1999, the Ethiopian National Steering Committee Against Sexual Exploitation of Children reported that child prostitution is on the increase especially in major urban centres; however, there are no statistics available*." Most reports however quote each other. But, another country report in 2001 of the US Bureau International Labour Offices Ethiopia[27] stated: "*Girls as young as 11 years old are recruited by the commercial sex industry to work in brothels, bars, and hotels … Underground child sex trade and sex tourism in Ethiopia are reportedly on the rise and are more organized than once*

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[26] Retrieved from: www.globalmarch.org on 28-04-2007
[27] Retrieved from: http://www.dol.gov/ILAB/media/reports/iclp/tda2001/ethiopia.htm on 13-03-2007.

believed. Children's involvement in the commercial sex trade occurs mainly in resort towns and truck stops in Addis Ababa." In the bigger cities of Ethiopia sex-selling bars are frequently visited by tourists or non-Ethiopians. It can be argued, that in those bars under aged girls are offered as well. As a restaurant manager (Interview 10-2007) committed to improve the local tourism industry in a CRV town said: "*already there are minor girls participating in a sex industry focussing on foreigners and tourists, I see them … We have a policy of refusing those kind of couples in our restaurant. We want other restaurants and hotels to implement those rules too.*" This restaurant manager has experience in the northern region of Ethiopia with young exploited women, also as a result of tourism. Consulted stakeholders are not amused that minor boys and girls are offered to tourists (Observation & Interviews 9/12-2007). As an Ethiopian tour-guide (Interview 11-2007) put it: "*Parents offer their children for adoption when tourists pass, why not offer them for sexual purposes. It seems to be more easy and more beneficial.*" So, it can be argued that child sex tourism is an upcoming phenomena. Especially when parents and the Ethiopian society seems to be vulnerable and likely to allow such practices, children cannot protect themselves as well as parents can. Moreover, stakeholders do see indications of Child Sex Tourism in Ethiopia.

The entertainment industry connected to tourism does have a strong sex-industry component as well. Going out means easily getting in contact with sex selling women (Observations & Interviews 9/12-2007). As an employee of an international NGO put it: "*At places of entertainment tourists meet local women, you can imagine what is happening there. You should analyse this situation, because it is an important aspect of the tourism industry.*" These entertainment places attracts a substantial amount of travellers, tourists and expatriates. Hotels do have from history the name of pleasure houses (Interview 12-2007). Parts of the hotel industry do continue to have this name once tourists arrived. Especially in the south, and on a smaller scale in the CRV, tourists tell about experiences with sex-selling women in hotels (Interview 12-2007). Besides tourists, tourism employees do know this as well. Tour-guides, drivers and other employees of the travelling tourism industry do tell about those practices (Interviews 11/12-2007). According to some stakeholders, willing to talk about this subject, those tourism employees even enforce this industry by accepting offers of sex selling women. As an Ethiopian tour guide (Interview 10-2007) said: "*drivers of tourists drive around the country and just have sex in the same hotels as tourists stay on the countryside.*" A director of a regional tourism commission (Interview 12-2007) responsible for the regional hotel industry confirmed this. At the same time he said: "*I have never heard about any practice which would suggest that we have a sex-tourism industry. We will never have that.*" This definite standpoint could be based on convincing knowledge or unwillingness to coop with this problem. In both cases, the hotel industry does evidently play a role in combining tourism with a sex-industry. This easily can develop into destination based on a sex-tourism industry.

It might be to definite to conclude the CRV has a sex-tourism industry, but there is a sex-industry linked to the tourism industry. Minor boys and girls are becoming part of this industry. This all can be argued based on facts, reports and opinions. It can be stated that there is no condition which would prevent the Ethiopian society of developing a sex tourism industry. Except of cultural defined norms and values, there is not indication of another condition which is preventing the CRV from having a sex-tourism industry. The question is whether those cultural defined norms and values are strong enough in relation to a dominant tourism industry. Once minor

boys and girls are becoming part of a sex-tourism industry another serious challenge the CRV tourism industry has to face. Livelihoods of those minor boys and girls, conditions within the Ethiopian industry, international treaties and agreements concerning children and sexual exploitation, the image of Ethiopia and several other issues have to be taken into account seriously by all.

4.4. Institutional Structures of the Tourism Industry

The backbone of a tourism industry are the institutional structures. Those structures can safeguard the condition of a tourism industry and realise the execution of a particular concept. In Ethiopia, authorities are hold responsible for the functioning of this backbone, especially since the private sector and NGO's are not in the position to do so. But, all sector stakeholders do have a particular position in CRV's tourism industry which is not always predetermined. In this paragraph the institutional backbone of the tourism industry in the CRV is analysed. Challenging rules, regulations, contracts, leadership, power allocation, and partnerships are given.

4.4.1. Rules and regulations

Rules and regulations are meant to shape daily practices of the tourism industry. Rules and regulations of a tourism industry become clear around particular sub-sectors, like guiding, hotel management and tour operating. The Ethiopian authorities do have various tourism related rules and regulations, those should be taken into account by the CRV tourism industry as well. Noteworthy to state is the position of tourism authorities. Similar companies work together with different tourism authorities. One company might work with a local tourism commission, while another company works directly and only with the regional tourism commission. Mandates of each tourism commission is unclear for companies, which causes an unclear and random process of retrieving permits and licences. A national tourism policy is expected to be implemented in 2008. This policy might clarify the positions and mandates of each tourism commission.

Rules and regulations are applied on guiding and tour operating. Registrations are important before starting your practices in the tourism industry. After registration the quality is checked by rules and regulations. The impact of those checks are questioned. They are easy to corrupt according to a tour-guide and director of a tour operator (Interviews 9 & 12-2007). For example, a tour operator can start operating once he has five suitable cars during registration. Representatives of the responsible authorities can control this rule. This rule is easy to corrupt when agreements with rental companies are established. Cars are hired for a particular period and used to achieve the license (Interview 11-2007) Tour guides only can be employed when they have particular certificates and licenses. Tour operators confirm their licensed tour guides at the authorities, but in fact they employ their own guides which they trust or have agreements with in advance. As a director of a tour-operator (Interview 11-2007) said: "*A trustful guide is equally important as a licensed guide.*" Tour guides do have responsibilities when they are on tour for a tour operator. This responsibility is partly assured by licensing and certificating, but trustworthiness does play an important role as well. Choosing trust as more important than licenses and certificates do enhance illegal practices. Illegal tour-operators and tour guides are common. In the contemporary tourism industry, illegal practices of guides and tour operators are estimated to be thirty percent according to two directors of tour operators (Interviews 11/12-2007). The remaining seventy percent are legal, but do have illegal practices as well. This is possible due to weak controlling systems. As

another director of a tour operator (Interview 12-2007) stated: "*The government lack any capacity to monitor and control its tourism industry.*" This is confirmed by various reports on tourism (*see for example:* HGL & GIRD 2007). Illegal practices within a tourism industry do threaten the very status of the tourism industry. A sustainable and continuing tourism industry profits from a well controlled and monitored daily practice. In Ethiopia and especially in the CRV, matters should be managed and regulated in an accurate way.

The Ministry of Culture and Tourism is assigned to control the quality of hotels. Most of the only time hotels in Addis Ababa are controlled. There seems to be more interests at stake. The Ministry of Works and Urban Development executed a research program concerning the qualifications of hotels in Addis Ababa. They concluded that less than half of all two hundred hotels in Addis Ababa do meet the standards. Addis Ababa authorities announced a quality improving program and a strategy to double the 5000 hotel beds in the capital (Fortune 23-9-2007:10). In the CRV hotels are rarely checked. As CRV sub-regional tourism commission (Interview 12-2007) responsible for controlling the quality of the hotels in his region said: "*Our office checked one hotel when it started operating, here across the street.*" Various reasons can be given why hotels are rarely checked on their quality in the CRV. Food security in hotels is already argued as a challenge. Although the authorities do have the responsibility and legal instruments to control hotels on for example food security, they do not control. According to two directors of regional tourism commissions this is due to capacity problems. Both expect to get more money as a result of the in 2008 finished national policy (Interviews 11/12-2007). Rules and regulations are on hand, but rarely implemented. It is difficult to control the effectiveness of those rules and regulations since they are not implemented, partly due to capacity problems. As a consequence, rules and regulations on hand are becoming useless just after adoption. A growing tourism industry which is meant to be sustainable desperately needs regulations in order to secure a fair distribution of benefits.

4.4.2. Contracts

Investors in the CRV have to sign contracts designed by national authorities and adjusted by the Oromia Investment Commission. Contracts are central to tourism development as a legislative backbone, especially after privatisation became a strategic priority in Ethiopia. As an advisor (Interview 9-2007) within the Ministry of Culture and Tourism said: "*Tourism planning, rules and regulations are now mostly established and applied in the federal investment agency. Actually, this is the centre of tourism activities. Tourism development is foremost seen as a commercial activity.*" In these contracts various conditions are mentioned, thus shaping the practices of a tourism industry, especially those of the private sector. A few conditions are noteworthy to mention in order to illustrate the content. For example, two percent of the investment area need to be covered by trees, except of the eucalyptus tree. Another condition is that locals need to be employed. Only when required qualifications are not locally available, expertise from outside the area can be employed. Another condition is that the investment needs to be initiated within a year after signing. Asking a staff member of the Oromia Investment Commission (Interview 10-2007) about the control with respect to those conditions he said: "*this is not controlled, it is stupid, just some paper. Investors are free to do what they want*" It comes to the commitment of an investor and the controlling mechanisms of authorities whether these conditions are respected. In practice, this is not done. Most investors are more dominant than authorities. Showing up in the bureaucracy in the

capital is enough to continue whatever business the investor is planning to execute. But, in such a situation the investment is uncontrolled, which means the investment is also not supported by conditions as well. Supportive frameworks in agreements are important conditions for investors. As such, conditions in contracts meant to be legislative steering mechanisms of tourism development seems to feel in terms of regulations and support. As a consequence of no implementation and follow-up, conditions are of non-value for stakeholders as well as the tourism industry in general.

Contracts with any stakeholder which do want to invest are similar. The conditions of the projects which are implemented in the CRV are in practice non-obligatory and non-supportive. Stakeholders design and determine its own objectives and conditions. Economic, ecological, socio-cultural and political impacts are not controlled in the tourism industry. Those impacts are mentioned by authorities, but in reality they are not assessed nor controlled. An experienced director (Interview 12-2007) of a tour operator labelled this as lip service. Since tourism industry practices can be executed unconditionally the impact, positive or negative, of those practise depends on the objectives and commitment of the stakeholders.

In the case of ASLNP contracts do play an important role. Conditions in contracts are meant to steer the future concerning conservation, visitor management and investments. Impact of these conditions however remain doubtful. Already discussed is the declining natural attractiveness of ASLNP. Besides that, the future of the park itself is unsecured by 'leasing' parts of ASLNP for free to an Arabic investors under the same uncontrolled non-supportive conditions as discussed above. The ASLNP has been seen as the pearl of the CRV years ago according to committed stakeholders (Interviews 9-2007). The UNDP drafted a master plan together with the Ethiopian government in 2005 to start a conservation management system for all protected areas in Ethiopia. Estimated costs were 30 million USD (UNDP 2005:64). CRV's ASLNP and Senkelle Swayne's Hartebeest Sanctuary were part of this project. Although the project was signed and ready to be executed unknown reasons caused the end of this project. Ecological recovery of ASLNP remains however important for all concerned stakeholders. Despite of this, the regional state government 'leased' areas of ASLNP to an Arabic investor. More than fifty percent is 'leased' to the Arabic investor. No particular condition related to the situation and the future of the park is taken up in this contract (Observation 10-2007). The Arabic investment in ASLNP should be 1,4 billion USD, which most probably will not be invested in this area. There isn't any amount of money mentioned in the contract and private sector leaders (Interview 11-2007) are claiming that this company cannot posses this amount of money. The director of the regional tourism commission (Interview 9-2007) points at the civilisation factor of this investment, saying: "*this investment will bring prosperity and public services to the citizens there.*" Concerned stakeholders say ASLNP will be occupied by the investor and maybe after a few years some accommodations will be built, emphasising that the investor is interested in either minerals or money-laundry. The Arabic investment seems to be suspicious according to some private en non-profit sector stakeholders (Interviews 9/12-2007). However, conservation management will decrease even more during this period, making the future of ecology and settlements of the park insecure. Until the time they will start building, investing this surreal amount of money, the area will be prone to become a barren region according to neighbouring and concerned stakeholders. The Arabic investment is not initiated a year after signing the contract. Consulting responsible authorities (Interview 10-2007), say the contract will most probably not

be cancelled although this is one of the conditions. ASLNP seems to be a free zone for investors. This became more clear in the answer on the question if I was allowed to build a hotel on the islands in the lakes. The director (Interview 11-2007) of the tourism commission in the area of ASLNP answered: "*we would be very happy. You can start, no problem ... I can contact you with the investment commission in Addis*" ASLNP seems to be free to invest in, although it is a designated conservation area. Responsible governmental bodies seems to give up the future of this conservation area. For sure is that the future of ASLNP remains uncertain in almost every aspect. Related contracts cannot bring promised developments so far and it is the central system in Addis Ababa which made this investment possible.

4.4.3. Centralised leadership, power allocation and insecure links with tourism development

Addis Ababa is ruling the tourism industry in the CRV. Every component of the CRV tourism industry has its leader and power-links in Addis Ababa. As such, it is a centralised power system. Decisions, contracts and information are designed in Addis Ababa. Local knowledge, the local environment and local challenges seems to have no place in the process. The current realities of Ethiopia's state's provision in terms of public rights and political freedom are questioned (*see for example*: Freedom House 2008:7). Under the present government, some fundamental freedoms, including freedom of press, are circumscribed. It all shows the centralised leadership of Ethiopia, despite its semi-autonomous regional states. Repressive activities of the federal government does have consequences for interest groups (local-national) related to tourism as well, especially Ethiopian organisations. The disempowerment or non-existence of (local-national) interest groups (in)directly related to tourism is the consequence of current political provisions.

The tourism industry is officially lead by governmental authorities, although some components are privatised. Governmental hotels are sold to private investors and marketing of the Ethiopian products is partly given away to the private sector. In fact, the tourism industry is lead by the random practices of all stakeholders together. As the group of consultants in the Rift Valley concluded: "*accommodations, services and facilities available for tourism in the RVLB are unregulated and uncoordinated.*" (HGL & GIRD 2007:108). On every challenge, the line up of stakeholders leading or causing it is different. But, centralised governance and the low legislative position of Ethiopian stakeholders like local communities and NGO's are common structures. Management of the tourism industry in the CRV has been mainly government dominated which has retarded rather then enhanced development (HGL & GIRD, 2007:106). The problem of centralised leadership in tourism is to plan and implement adequate solutions and strategies on a local or specific level, like accommodations and services. Tourism development requires power and systemisation from a local to a global level, especially when sustainable tourism development concepts are preferred.

Power allocation seems to be related to the random practices of the tourism industry, although the private sector and tourists can be seen as consistently powerful. As discussed, non-obligatory and non-supportive environments are created. So, the appearance of the tourism industry is determined by the random practices of the private sector and tourists due the a non-obligatory, non-supportive and non-regulated environment. Regulatory institutions like the public sector appear to be depended upon the random practices of the private sector and tourists and to some extends the likes of the NGO's in the non-profit sector. This internal

dependency seems to be the case on national levels, but local authorities are depended as well. Authorities do ask investors to solve their problems. As a director of a regional tourism commission said: "*we are waiting for an investor or a NGO who could solve our problems.*" (Interview 10-2007). By being helpful and 'patience' private investors and international NGO's do get the power to manoeuvre.

So far, there is no evidence or sign that investors or NGO's solved any problem, especially when it comes to structural development in the CRV. Concerned stakeholders as Ethiopian NGO's and civil movements have to lobby, but lack any form of power and capacity to change practices. According to Freedom House (2008:7) Ethiopia underperformed in terms of political rights and civil liberties. Ethiopia is described as partly democratic, but civil movements are subject to suppressive and random oppressive measures. Only international NGO's do have certain room of manoeuvre and the financial capacity to execute projects. But, the execution of projects is enveloped by non-obligatory, non-supportive legislation and unregulated realities. Ethiopian NGO's which do want to change practices in the overall tourism industry lack power and capacity, although the latter is debatable in some cases. However, their position appears to be powerless and actions are overruled. When problematic events occur Ethiopian NGO's are afraid to start lobbying and initiate solutions (Interview 12-2007). They are mostly afraid of the future existence of their NGO. It can be argued that official protesting and lobbying among authorities is hampering the existence of Ethiopian NGO's. For example, an Ethiopian NGO appears to be powerless on a critical ecological case, although they were funded by the international donor community and committed themselves to critical aspects in the Ethiopian ecology. Summing up challenges within the CRV tourism industry, this NGO did not want to act pro-actively on any issue afraid of being charged, and even to be lifted as an NGO (Interview 12-2007). In this case, a dominant government retarded rather then enhanced development.

On the location were challenges do occur the majority of stakeholders do not feel responsible. Some are committed to find solutions, but because of various reasons they do not go ahead with a plan. All stakeholders can sum up challenges, but no single stakeholder would take the lead, including responsible local and regional authorities. Together with the helpful and 'patience' attitude of local and regional government officials towards investors and NGO's this is causing a 'deadlock' in terms of power within the CRV tourism development. In this situation, nobody takes responsibility and every stakeholder is awaiting further developments. Existing and future challenges are not approached at all. This situation is deadlocking all kinds of developments, especially bottom-up developments. In addition, officially responsible stakeholders, especially those in the centre of power, lack capacities, strategies and visions to approach every single challenge. When responsible stakeholders, in this case the government, do not acknowledge problems the future of a sustainable CRV tourism industry and other problematic features are at stake. As Brohman (1996:62) stated in his report on tourism in developing countries: Without state intervention, tourism development will likely lack the cohesion and direction necessary to sustain itself over the long term. Unregulated short-term initiatives which serve the narrow interests if powerful forces in the industry may well jeopardize the sustainability and longer-term tourism potential of many communities upon which majority interests are based. Problematic process could grow out of the hand of all stakeholders, also because other challenges will occur simultaneously when tourism arrivals in the CRV increases.

4.4.4. Stakeholder partnerships and preferred attitudes within partnerships

Because of conflicting agenda's partnerships between NGO's are rarely established, though efforts for building partnerships are commonly seen. But, most of those partnerships do not have a follow up after signing a Memorandum of Understanding (MoU). When challenges occur, a partnership of international NGO's could be beneficial for solving the problem. Most of the challenges within development go beyond the expertise, area or financial capacity of international NGO's. As a result, attempts for building partnerships are made. Partnerships are needed in those cases. But, those partnerships themselves are becoming another challenge resulting into an inefficient or ineffective partnership and ultimately no follow-up. Projects are rarely executed. A major reason why partnerships are not successful is the conflict of agenda's. For example, an NGO's which is funded to execute Eco-Tourism projects will face difficulties to work together with another NGO's which is funded to execute a Responsible Tourism concept, let alone conflicts on the conditions of funding (e.g. reporting mechanisms and funding running costs), areas and locations of investment. Officially each international NGO's does have their own objective and mission. They prefer to work on their own terms and conditions. Partnerships face difficulties to operate under those conditions. Flexibility is needed from each stakeholder in order to overcome the fact that most of the partnerships do not have a follow-up.

There are some official partnerships between national authorities and (I)NGO's, like for example between the World Bank and the Federal Government on tourism. These partnerships are in some cases related to the CRV when it comes to infrastructural, educational, economical and to a lesser extent attempts of executing conservational programs. These programs are mostly the result of bilateral partnerships. National, regional and local authorities do cooperate directly on NGO projects as well. But, such partnerships are considered to be arbitrate by the donor and NGO executing the project. Partnerships with authorities are not an obligation, although authorities are responsible of the working field. For example, a million dollar project in the CRV on tourism development did not have any official partner in the government, except of meeting the required conditions authorities did ask (Interview 9-2007).

When local authorities cooperate in a tourism project their capacity is absorbed completely. For example in an eco-tourism project the regional tourism commission had to use all their available time and expertise (Interview 11-2007). Authorities related to tourism all stated that they lack capacity to steer its development. Capacity can be described as finances, expertise, time and equipment. As a Woreda tourism commissioner (Interview 12-2007) said: "*we do not have any transport to visit attractions. We can go by public transport, but most of attractions are not in reach by public transport.*" Lack of capacity is one of the reason why authorities are not part of tourism developments in their regions. Besides that, conditions and legislations are not forcing incoming stakeholders to cooperate with local authorities.

Partnerships between local communities and authorities, private sector and NGO's are rarely seen, although every representative do speak about the necessity of involving locals. As a report from consultants on tourism development in the CRV stated: "*Community involvement is low, mainly because they tend to be overlooked, and they tend not to benefit from development in the sector*" (HGL & GIRD 2007:107). Mostly NGO's do establish partnerships with locals, which makes clear that partnership building depends on commitment and willingness of at least one stakeholders. Another reason why local communities tend to be overlooked is

because of their legal status (property and identity wise). Often their property or existence are not registered, especially the property of farmers. They have a substantial interests in the development of tourist activities, because of multiple use of resources or since it is part of the sustainable tourism development concept. Still, locals can be ignored or are easily overlooked since administratively they do not exist. As a director of a regional tourism commission said: "*local communities do not have a legal status. They do not have any position.*" Other stakeholders interested in tourism development are not obliged to work with local communities.

Tourism developments intend to ignore existence and property of locals since these are not registered. This was for example the case in a resort investment around lake Langano. Now, the owner is blaming to have made investments in this area. Talking afterwards, the success of this resort completely depended on the cooperation of local communities. He invested in this resort first without talking with the local communities and already started receiving guests. Communities however were expecting benefits from the investment but did not have the chance to communicate this to the investor. Not being consulted raised their anger. "*My guests are arriving at my resort with holes in their cars. I have many difficulties to please the local communities. If I would know this in advance I would not invest here.*" the owner said (Interview 11-2007). Other stakeholders (e.g. authorities, organisations, associations etc.) are not supporting any part of this investment or their support is not reliable.

Since 2003 Ethiopian authorities, supported by the World Bank and US Agency for International Development (USAID), do give land holding certificates to particular regions in the CRV (Fortune 16-12-2007:42). The rights of the farmers of the land need to be respected when tourism developments arrive. But owning and selling of land is still the privilege of the government. A legal status of locals would not change the situation of ignorance and overlooking. Legal status of existence and property are essential, but additionally local communities need a formal position within the line up of stakeholders in order to claim their interest. Especially so, knowing the results of overlooking and ignoring (e.g. disturbance, commercially less interesting areas, problematic interactions) of local interests.

International experiences and expertise in the field of tourism development are rarely used and consulted, especially regionally. In Addis Ababa international expertise is being collected and used. This expertise is rarely transferred to the CRV due to the centralised leadership and macro-economic approach. In the CRV two major projects are established with international expertise and funding. Both are initiated, formulated and executed by international expertise and funding. Invoking expertises and experiences from other countries is rarely done by the responsible stakeholder, like the government. Although neighbouring countries, as Kenya for example, do have a long track record and knowledge concerning tourism this source of information is rarely used. Here it comes to the attitude of governmental authorities. As a director of a regional tourism commission (Interview 12-2007) said on the question what to do when he knows something goes wrong: "*we monitor how everything goes. If something goes wrong, we can repair it … this is like learning by doing.*" Another director of a regional tourism commission (Interview 11-2007) said: "*tourists brings more good than bad!*" In this case, the directors were confronted with various challenges, which are discussed in this chapter. The prospects of tourism development seems to result into ignorance the necessity of invoking and importing expertise and experience, locally and internationally. Northern Ethiopian, Kenyan and

Tanzanian expertise and experience could contribute to the professional level of the CRV tourism industry in advance.

International expertise is mostly used by NGO's. Because they have difficulties to work together, they often start looking inside their own network for expertise. Consequently, international NGO's plough expertise back in their home countries, mostly European countries. This thesis is a result of this strategy. This contributes to a situation in which every stakeholder, especially non-profit sector stakeholders like NGO's and foundations, are working on their own. This creates tunnel-visions and incoherent development projects. Partnerships on integrated and comprehensive programs are needed, although conditions have to be changed. For example, the private sector cannot be supported by development assistance. As this report stated: "*The hotel industry itself cannot be a target for Japanese foreign development assistance because Ethiopian regulations do not allow support to the private sector directly.*" (Japanese Embassy in Ethiopia 2007:10). Particular partnerships would benefit CRV's tourism industry, but internal and external conditions of partnership building need to be explored.

4.5. Concluding and Cross-relating

In this chapter many challenges are discussed. Social, cultural, political, economical and ecological challenges, on its own or in cross-affective settings, are determining the CRV tourism industry. In general, the tourism development potentials of the CRV are surrounded by various obstacles. They challenge the sustainability and continuity of the CRV tourism industry in one way or another. Some apply on a local level, while other challenges are identified on a (inter)national scale influencing CRV tourism industry's status. For example, the poor image of Ethiopia has a significant impact on tourist arrivals. CRV, which plays a marginal role in the Ethiopian tourism industry due to a lack of product development and marketing, receives low profits and low number of tourist arrivals. Underlying causes of the challenges can be found in the development ideology, like programming tourism development, and institutionalisation, like managements, of the CRV tourism industry. As such, it is a call for structural change. Because CRV's challenges are related to each dimension of tourism preferably sustainability principles have to become part of a structural development program.

Development ideologies differ among stakeholders. Concepts and practices of tourism stakeholders in the CRV are conflicting, mostly unintentionally. In general, the CRV is lacking a tourism development program. Unorganised tourism development results into uncontrollable challenges for each stakeholder involved. CRV's environmental situation requires intervention in terms of conservation management and clear measures on the relationship between tourism and water resources. Environmental concerns should be of concern of any industrial development in the CRV. Tourism is a potential industry in the CRV, but its environmental impact has to be assessed. Current environmental research should involve the prospected environmental dimensions of tourism, such as water consumption of tourists. On the contrary, the Ethiopian government is executing a macro-economic and liberal approach which seems to exclude environmental and local needs. This approach seems not to be executed as proposed, because of ineffective marketing and the non-obligatory and non-supportive conditions related to investments. In addition, systematic focus on hotel investments results into a lack of attention of all other dimensions of tourism, such as a fair distribution of benefits locally. It also results into foreign ownerships causing economic leakages. So, the

impacts of the macro-economic and liberal approach are in conflict with local and environmental needs, because attention has been shifted away. Local communities do show different standpoints. Tourism development should benefit their community directly. This standpoint is not reflected in development programs. Local communities which are not designated as beneficiaries find themselves in problematic interactions with tourists. On specific locations there seems be no policy or management with executive powers at all, as in the case of ASLNP. As a result of lacking tourism development programs on a national and regional level benefits are not distributed or agreed on causing problematic host-tourist and environment-tourism relationships. Although the vast majority of consulted stakeholders are in favour of tourism development in the CRV, there are efforts needed in common sense building among them resulting into a clear tourism development program. For example, expectations of non-profit stakeholders are concept focussed rather than market and structural development focussed. In their concepts of sustainable tourism development a wide ranch of environmental and socio-economic benefits are theoretically assured. But, challenges are unarticulated in their programs, although they determine the success of a tourism industry. A lot of critical factors make a sustainable tourism development rather uncertain, both locally and regionally. Although non-profit sector stakeholders' intentions seems to be properly and convincingly formulated, the effects need to be criticised in development terms. Structural change and developments are needed in combination with market perspectives, including all concerns mentioned in this chapter. Mainstreaming particular aspects of sustainability, especially on environmental issues, and introducing all aspects of regular tourism development planning would contribute to CRV's tourism industry structurally.

Institutionalisation is another underlying cause of many challenges. It refers to management, positioning of stakeholders and the legislative backbone of CRV's tourism industry. In the current context, the Ethiopian and CRV governments are responsible for a majority of the institutionalisation aspects. Although the CRV and Ethiopia does have an institutional structure starting from Kebelle up to ministries. This structure in the CRV seems not to be operational for tourism development due to lack in capacity, organisation, partnerships, position, power, knowledge, money, understandings etcetera. For a sustainable CRV tourism industry this structure is essential. In fact, the structure does not go from local to a national level, Ethiopia operates a top-down approach which results into excluding environmental concerns, local community interests and requirements, and limits the power of interest groups. It distributes power to the major players in the private sector, which causes in one way or another random practices by its stakeholders. Due to a lack of comprehensive and executive power systems and programs on each level, each stakeholder is handed over to the random practice of a tourism industry. As a result, the line-up of stakeholders is unclear, unorganised and unregulated causing an obstacle in proper development planning. A commonly and returning aspect is the central leadership and powerless position of Ethiopian non-profit sector stakeholders. Sustainable tourism development planning requires the involvement of local interest and groups and requires regulations of the practices of private sector stakeholders. Each sector stakeholder seems to lack a clear position in the decision making process and lack capacity to (co-)manage CRV's tourism industry. Moreover, the decision making process itself is unclear for many stakeholders. Many aspects of tourism are dealt with on a national level, such as conservation and tour-operating. Other aspects (e.g. investments) are dealt with in between national and regional government bodies. Local governmental bodies usually refer to higher institutions when it comes to

policies, rules and regulations. An unconditioned, non-obligatory and unsupported environment from a central position negatively impacts the sustainability and even the continuation of the CRV tourism industry.

So, the institutionalisation and development ideology in terms of programming are the underlying causes for all challenges. This requires structural change rather than a single tourism development project. As a result of a lack of structural change challenges easily occur and will continue to occur when tourist arrivals grow in the CRV. The extent and weight of each challenge should be discussed, but the existence of each challenge is made clear. Remains a thorough analysis of all issues by concerned and related stakeholders. Challenges will become obstacles for further tourism development, especially when sustainability principles are declared benchmarks in tourism planning. Although these challenges might be overwhelming, CRV's tourism potential in terms of attractiveness remain doubtless. Acknowledging and recognising challenges by all stakeholders would safeguard the CRV tourism industry from a problematic future. A structural development program which integrates each dimension of tourism, especially environmental concerns, and which clearly positioned sector stakeholders based on management and planning strategies would create an environment in which CRV's tourism potential can flourish.

Chapter 5. Scenarios for CRV's Tourism Development

"Necessity to change is nothing more than the result of a lack of foresight"
(De Jouvenel, 2000:40)

5.1. Introduction

This chapter formulates scenarios for tourism development in the CRV. Four scenarios are developed. The objective of scenario building is illustrating possible and realistic directions for tourism development. By illustrating and discussing particular ways of development contemporary challenges and potentials become clear. The four scenarios are different from each other and may even contradict

The objective of developing scenarios is involving stakeholders into a process of developing solutions, designing development projects, incorporating pro's and con's in future programs, all related to the potentials and challenges which are central to this study. Stakeholders are invited to develop their own scenarios based on critical factors which they consider as most critical. The process of scenario building is open to discussion and learning. This chapter continues with introducing and explaining the four scenarios.
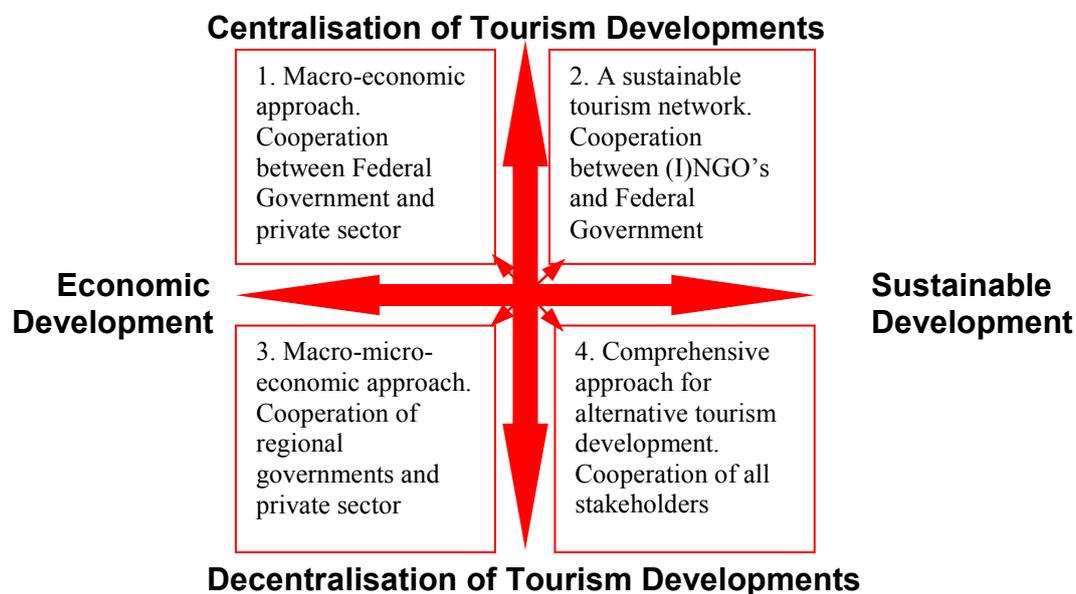
5.2. The Scenario Narratives

A scenario matrix illustrates four scenarios. To this end, the scenario matrix is developed based upon two sets of opposite variables. These variables shape the content of the scenarios. The two sets of variables which are central in this scenario building process are 1). the institutionalised level and 2). development ideology and strategy.

As is concluded in paragraph 4.4, the institutional structure and development ideology are the critical factors in CRV's tourism industry. Since all consulted stakeholders are in favour of a growing CRV tourism industry each scenario illustrates one possible way of tourism development. This study showed that development can take place under specific conditions. Therefore, four management constructions behind tourism development ideology are central in each scenario. To this end, each variable is divided into two contradicting extremes. Institutionalisation, as management constructions, is divided into centralised and decentralised approaches. The public, private and/or non-profit sector form the management team as they define and manage tourism development, nationally or regionally. In each scenario the most powerful or ruling sector is detected. For instance, a centralised economic approach has another line-up of ruling sector stakeholders than a decentralised sustainability approach. In each scenario at least two sectors are cooperating. The development ideology, the other variable, is divided into economic and sustainable development. Economic development means that the interest of the private sector is prioritised. An economical approach does prioritise economic interests, which may include benefits for the society as well. Sustainable development is an approach which could benefit CRV's overall development. As is stated earlier, challenges in the current tourism industry are social, cultural, ecological and economical based. A sustainable development approach is valuing each issue as equally important on the long run.

In paragraph 5.7. the four scenarios will be discussed in terms of constraints and advantages. This paragraph has the aim to initiate a debate among committed

and responsible stakeholder concerning the future of CRV's tourism industry. Current problems and challenges, described in Chapter 4, are related to this discussion as well. In each description and discussion of the scenarios, challenges discussed in previous chapters are introduced and related. Figure 5.1. shows the four scenarios.

Figure 5.1: Scenario matrix including narrative titles

Centralisation of Tourism Developments

| | 1. Macro-economic approach. Cooperation between Federal Government and private sector | 2. A sustainable tourism network. Cooperation between (I)NGO's and Federal Government |

Economic Development

Sustainable Development

| | 3. Macro-micro-economic approach. Cooperation of regional governments and private sector | 4. Comprehensive approach for alternative tourism development. Cooperation of all stakeholders |

Decentralisation of Tourism Developments

In a centralised economic tourism development approach **(1)** the federal government and private sector determine the direction for tourism development. In the decentralised sustainable approach **(4)** of the tourism industry all stakeholders are equally important leading tourism development by mutual consultation and agreements. In this study this is called the comprehensive approach for alternative development. The sustainable tourism network **(2)** represents an approach on sustainable issues, led by theoretical, national and intellectual debates. The decentralised economic approach **(3)** is based upon an autonomous regional government and private sector. In this scenario the Oromia region is responsible for all aspects of the CRV tourism industry. The scenarios are each other opposites demonstrated by the arrows.

In the following paragraphs the four scenarios will be presented in four paragraphs. Each scenario is described in such a way that it might trigger debate and discussion, which is the ultimate intention of the scenario building process. Each scenario description is divided into four sections. First the scenario will be introduced. Secondly, the Year 2020 will be illustrated. This section presents the future perspective of the scenario. Thirdly, current conditions which contribute the scenario are presented. Finally, by back-casting the steps to be taken will be presented. Those steps have to be taken in order to achieve the future perspective presented in the Year 2020 section.

5.3. Scenario 1: The Macro-economic approach

This scenario illustrates the macro-economic approach. It is the result of centralised leadership and an economic approach regarding tourism. As such, it is titled the macro-economic approach. A cooperation between Ethiopia's federal government and the private sector is formulating and shaping future developments. Economic

development is prioritised and economic aspects or goals are indicators for the success of tourism development. In other words, tourism development is measured, qualified and quantified in terms of economic advancements.

The macro-economic approach shows similarities with the contemporary situation. Liberalism, private investments and privatisation of tourism products are happening in the contemporary tourism industry. Altough this scenario is a macro approach, it will shape the development of the CRV tourism industry. The macro-economic approach creates a system in which tourism developments of the CRV tourism are subjected to.

5.3.1. The year 2020

In 2020 the federal government and private sector are leading actors. The Ministry of Culture and Tourism (MCT) represents the federal government and is executing a tourism development model which is best described as a macro-economic approach. A group of (inter)national businesses represents the private sector. National and international tourism stakeholders, like Ethiopian Airlines and international hotel chains, are included as well. MCT is the responsible and most powerful actor. MCT is working together with other national authorities, like investment commissions and maybe later in the program a national tourism authority which is responsible for promoting, marketing and regulating the tourism industry. As yet, MCT is the policy-maker and responsible for these tasks. Tourism development is approached as an international economic sector. The tourism industry is linked to international standards. Investors are mostly doing business in real estate building, starting with the most commercially beneficial locations in Ethiopia. Beside the subsidized import of land cruisers, inter-regional operating bus companies are modernized to suit another tourist type. In order to incorporate domestic tourists particular measures are taken, like giving discount in hotels and on attractions. Governmental hotels, restaurants and national parks are privatised. Particular locations are 'rented' or 'leased' to companies. These companies have the opportunity to develop an attraction. This could be a nature park, man-made attraction or events. MCT and other authorities are creating an environment and conditions which are contributing their objective, namely: an economically sustained tourism industry which is offering standardised hotels and restaurants and a sense of Ethiopia's ancient culture. The main reason behind this objective is earning foreign currencies and taxes. Employment and improving Ethiopia's image are important factors of success as well. Income through taxes and foreign currency exchange are used to enforce and enhance this approach. The objective will be evaluated by national tourist statistics which are gathered on a daily basis.

MCT executed an aggressive promotion campaign to attract tourists and investors. Improving the poor image has to be the positive side effect. Their main focus is attracting a particular number of tourists and investors in tourism. The campaign is running on holiday fairs, diplomatic communities, media and trade missions. The private sector is allowed to have their own promotion campaign. As such, an Ethiopian tourism brand is led by market processes. In order to safeguard the tourism industry a group of stakeholders from the private sector is strongly linked with MCT. This group consist of hotels, restaurant chains, tour operators and conservation companies. This group is controlling the tourism industry by setting the competition, standards, products, brands and images. Because tourism is led by market processes products and prices are highly competitive nationally and internationally resulting in a growing number of tourists. The growing number of

tourists enforced the niche market position of the CRV resulting in product developments, especially around Lake Langano and natural attractions (e.g. hot springs and forests) in the mountains surrounding the CRV.

MCT is not directly responsible for tourism products. They are responsible for creating an environment in which investors are free to create their commercially viable tourism product. All aspects mentioned during the contracting process are monitored, controlled and sanctioned by authorities. Authorities are controlling predefined standards among tourism stakeholders to safeguard the image, sustained investments and taxes from the tourism industry. Quality of the tourism industry is for example controlled by qualification of hotels and restaurants, controlling the nature of souvenirs, monitoring tour operators and their behaviour.

Tourism knowledge is educated on various schools around tourism areas delivering the sector educated personnel for guiding, hotel and restaurant management, tourism business as tour operating, serving and reception activities. These school are created as a result of the demand for educated personnel by all tourist activities around. Again the group of (inter)national stakeholders are determining the standards and direction of the educational programs.

Local authorities are commissioned by the MCT. They control tourism activities like the relationship between local communities and investments. MCT is setting standards for this. Specific authorities do monitor and set standards related to ecological value, for example conservation. Water resources are of national interest. Measures on the competition of water resources in the CRV are the result of a cooperation between agricultural, water and tourism ministries. Depending on the location and condition, priority is given to tourism development. Specific destination are already designated as a Tourism Development Area (TDA) which rules out any other industry in at this location.

The set of standards, legislation, rules and regulations by the MCT are of interest for the macro-economic approach. To improve the accessibility and 'pay ability' of entering Ethiopia, the visa application is simplified and more airline companies are allowed to land and take-off. The cooperation between the federal government and group of (inter)national stakeholder are safeguarding the quality of tourism products and prevent the tourism industry from morbid growth, poor organisation and undervaluation in terms of quality. Security and safety in its broadest sense is commissioned among authorities and departments of the MCT, resulting in the establishment of tourist police at certain places. Legislation, rules and regulations prevents CRV's tourism industry from violations of security and safety problems. The international aspects of the Ethiopian tourism industry in 2020 gives the opportunity to link tourism industries of the Horn of Africa. On the contrary, local interests groups are lobbying to get their social, cultural and ecological problems on the agenda. Naturally and formally, they do not have a place in the decision process. The agenda is set by the cooperation between the federal government and group of (inter)national stakeholder.

As a result, a wide range of tourist products (hotel, restaurants, tours, souvenirs, transport, attractions etcetera) can be offered to a growing number of tourists. Visitors can get a sense of Ethiopian nature, culture and hospitality.

5.3.2. Current conditions, events and potentials supporting the macro-economic approach

This approach shows similarities with the contemporary tourism industry. The Ethiopian economy seems to be 'globalised' or subjected to global market processes,

which is the result of a macro-economic strategy. Foreign currency earnings seems to be the most important reason for creating this environment. Privatisation of tourism products are a strategy of the federal government. For example, governmental hotels are sold to private investors. A majority of those investors are foreigners. Also ASLNP is open for investments. It is already leased to an Arabic investor. Other natural parks have been placed under the supervision of companies as well. As such, nature conservation is becoming part of the private sector and is increasingly commercialised. As a result of national strategies the Oromia authorities, of which the CRV is part of, allocated land free for investments. In addition, they produced a booklet where tourist attractions are presented to attract investors.

Another similarity are the promotion campaigns. The MCT has a program running on international holiday fairs to attract tourists. The central message of those promotion campaigns are the hospitality and historical values of Ethiopia. This promotion campaign is not as aggressive as it should be in the year 2020. In order to attract more tourists and to improve the image of Ethiopia, promotion campaigns will have to be increased and intensified. Marketing of Ethiopia also takes place by contracting tour operating enterprises. Trade missions already are focussing on bringing together Ethiopian tour operators and European travel businesses.

Monitoring and controlling mechanisms are in place. MCT has a standardisation procedure for hotels, tour-operators and guiding. Quality and reliability of tourism stakeholders are conceived as important by MCT.

In Addis Ababa a tourism network is established. There are signs of agglomerations of national tourism stakeholders as hotels and tour-operators. They are setting the standards, most of them are international focussed. Concerning private sector development in tourism, large-scale development of hotels, especially in Addis Ababa, can be seen. This is the commercially most interesting area. Number of tour-operators is growing. A new bus company is improving inter-regional mobility and filling up another segment of the tourism industry, especially benefiting the independent traveller. To involve Ethiopians in the international focussed tourism industry, the government already implemented discounts for domestic tourists. Hotel rates are lower for Ethiopians and the majority of attractions can be visited free of charge.

5.3.3. Back casting

In this paragraph the steps to be taken are presented. These are steps which has to be implemented in short-term after adopting this approach. MCT will be the leading actor. Long term steps to be taken could be the establishment of a National Tourism Authority, promotion campaigns on the Western-Ethiopia and extra-territorial legislation on the free movement of tour-operators in the Horn of Africa. Each step in the scheme below is directly related to the macro-economic approach as is illustrated in the previous paragraphs. The steps to be taken demonstrates the structural and institutionalised developments needed. At the moment, these are basic and essential needs.

Scheme 5.1.: Back-casting the macro-economic approach

Examples of steps to be taken concerning the institutionalisation
Establishing Federal tourism policy
Establishing investment policy on tourism
Coherence among policies of all governmental bodies. For example on investment conditions or competition on land and water resources

Establishing a group of (inter)national stakeholders, mostly from the private sector
Privatisation of governmental managed sectors (e.g. hotels and conservation areas)
Trade missions
Promotion campaigns nationally and internationally, especially on the historic northern route and pastoralist communities in the South.
Rules and regulations on for example quality of service and food safety.
Enforcing regional authorities on particular aspects of the tourism industry. For example on controlling quality and the relationship with local communities
Lobbying for limiting negative environmental, cultural and socio-economic impacts of tourism, especially related to water resources.
Clarifying the role of non-profit sector stakeholders, oppositional and interest groups

Several steps have to be taken in order to implement a macro-economic approach. Above mentioned steps are related to the institutional construction and challenges mentioned in chapter 4. In this scenario, as in those to be presented, tourism developers from each sector, private, public or non-profit, have to work under or on these conditions.

5.4. Scenario 2; Sustainable Tourism Network

The Sustainable Tourism Network (STN) represents the centralised approach of sustainable tourism development. International and domestic stakeholders from the public, private and non-profit sector are planning tourism development. Together they form the network for sustainable tourism. Sustainability is a key-term in this scenario. Ecological, cultural, social and economical issues are perceived as equally important.

5.4.1. The year 2020

In the year 2020 a partnership of international organisations, companies and federal government authorities are implementing a tourism development strategy. Members of this network formulated this strategy. The network does have a strong common sense, especially in terms of development ideology. The network is based upon the Sustainable Tourism Network (STN) founded in Nepal. In the case of Ethiopia, STN is a formal network influencing policies. Their objectives are based on definitions of tourism development planning and sustainability. All aspects of the tourism sector are incorporated, namely: social, ecological, cultural, legislative and economical issues are taken into account. The network is focussing on a sustainable tourism industry rather than a commercially interesting industry. STN focuses on the quality of the planet and people's life rather than focussing on tourist numbers. Foreign experts and intellectual scientific models influence STN towards a strategy for tourism development.

The network is operating from Addis Ababa and is based in the office of the Ethiopia Tourism Authority, which is established under the Federal Government Ministry of Culture and Tourism. The tourism authority has the mandate to promote, market and regulate tourism in Ethiopia. STN and the Tourism Authority are closel working together, especially on regulation and promotion. The network has a say in every initiative, like trade missions and investments requests. It provides training, organises events, provides a forum for discussion and shares experiences and innovations, facilitates information exchange and networking, contributes to an

tourism research centre, contributes to publications and encourages the involvement of all the stakeholders.

STN launched a promotion campaign which stresses the identity of Ethiopia. The CRV is part of this campaign as well. Images and messages from the CRV are incorporated. The promotion campaign aims to increase tourist arrivals in Ethiopia. Economical and ecological footprints of tourists are measured in order to control the contribution to sustainable development. The campaign also aims to recruit financial contribution for particular sustainable tourism projects.

The public sector part of STN, the Ethiopia Tourism Authority, is responsible for legislations, rules and regulations related to tourism industry practices. Those legislations, rules and regulations are discussed and developed together with all STN members. The private sector is introducing economical interests in the STN. Initiatives, like development projects, are analysed through a market perspective. For example, an eco-resort development project is previewed from a economical perspective. Although the eco-resort would contribute to ecological and social environment, it could become an economic failure. As a result licensing and contracts of this eco-resort are retarded or changed by STN members. Public-private partnerships (PPP) are established on a regular basis. A PPP is a joint venture between authorities and companies. Reasons for PPP's can be of all kind, most of the time financial or human capacity are focal points in these ventures.

International and domestic NGO's are working together with interest groups on small-scale development projects using international money and expertise. Particular locations in the CRV are turned into sustainable attractions serving the interest of nature, society and economy. All obstacles, constraints and advantages related to those projects are known by the STN. Obstacles of the public and private sector are known as well. The STN is shaping their policies in such a way that they benefit the working fields of their members. The network is focusing on all products in CRV tourism, from accommodations to trekking routes. Experiences from neighbouring countries and worldwide are used since the network does has strong links internationally. As such, STN is in between local and international spheres.

STN's link with local situations is institutionalised through regional representatives of the network. Local stakeholders are involved when STN requires it. They represent the local or regional tourism industry. Representatives are regularly invited to STN meetings in Addis Ababa. Representatives can come from local tourism authorities, as well as from other sectors related to CRV tourism. CRV departments of all members, researches, fieldtrips and seminars add more information to STN about the local situation. CRV interest groups which are not member of the STN have to lobby to get their issue on the agenda of the STN.

Tourism educational institutes are working together. They educate their students on all aspects of tourism. Special attention is given to sustainability in tourism education. STN is not only working on educating personnel for tourist services, creating tourism intellectuals is equally important. Those intellectuals will become planners of tourism development.

All components related to the tourism industry are controlled or related to the STN. For example, the accommodation sector, national parks and transport are not completely privatised as was the case in scenario 1. All components of the tourism industry are monitored in order to improve its sustainability. For example, transport is developed in such a way it includes the demand of CRV citizens as well. National parks are managed through conservation professionals. Commercial interest is less important than the well-being of the park. The STN has access to the necessary

human and financial capacity to manage national parks. In some cases park management is outsourced towards international organisations as WWF or IUCN. When it comes to infrastructural development in tourism, responsible authorities are advised by STN. The STN has a permanent position within other governmental and international institutions and do have an important say in the decision making processes even outside the Ethiopia Tourism Authority. This is especially necessary when it comes to the hydrology situation of the CRV. STN is monitoring the relationship between water and tourism all over Ethiopia. Policies on CRV tourism development are subjected to water resources. Since the STN has strong links in each sector a comprehensive water resource management system is implemented regionally. The STN also introduces Environmental Management Systems at a accommodations level, as well as Green Globe Certification rounds.

So, in the Year 2020 a tourism industry is offering sustainable tourism attractions, products and accommodations in the CRV. It serves the region, but tourists have to cooperate as well. Tourists are educated when it comes to their behaviour, practices and activities during holidays. The CRV became a 'smokeless' tourism industry.

5.4.2. Current conditions, events and potentials supporting this approach

The most important condition nowadays which would support this approach is the presence of the non-profit sector in Ethiopia. The capital, Addis Ababa, accommodates many international and national NGO's and foundations. The Ethiopian government is familiar with the non-profit sector since it has agreements with them on aid and development. The non-profit sector contains many interesting features which could benefit a STN. It has human capacity, financial capacity, monitoring and analytic instruments and obviously an international link. They have the resources available to establish a STN, especially when it comes to human resources.

There is a market for sustainable tourism worldwide. The image of Ethiopia also requires sustainable tourism. Also from a market perspective sustainable tourism seems to be a keen product. Since Ethiopia is considered as an underdeveloped nation by themselves and internationally, strategies for poverty reduction are regularly published. The latest is called PASDEP which mean a Plan for Accelerated and Sustained Development to End Poverty (MoFED 2006). The overarching aim of the national development strategy in Ethiopia is poverty reduction. The PASDEP is the guiding strategy for poverty reduction over a five year period, i.e. 2005/06 to 2009/10. Tourism is one of the focal sectors of this five-year development plan. Ethiopia is striving to use tourism against the war on poverty. The STN could fit in the implementations of this programs.

5.4.3. Back casting

This paragraph is listing the steps to be taken in order to achieve the Year 2020 situation. Leading actor is the Federal Ministry of Culture and Tourism (MCT) which established and authorised the Ethiopia Tourism Authority (ETA). Steps to be taken are basic needs when this scenario is adopted. The steps to be taken demonstrates the structural and institutionalised developments needed. Each step is directly related to the STN as is illustrated in previous paragraphs.

Scheme 5.2.: Back-casting sustainable tourism network Ethiopia

Examples of steps to be taken concerning the institutional construction
Establishment of the Ethiopian Tourism Authority and its mandate.
Formalising and authorise a partnership on sustainable tourism in Ethiopia, which will be the STN.
Position the STN in the ETA and MCT.
Establishment of the STN itself by constitution building and enrolment of members from the public, private and non-profit sector. Horizontal and vertical partnership building. Horizontal partnerships in terms of finding partners in the line of local to global levels. Horizontal in terms of building partnership of actors from the same level.
Public Private Partnership (PPP) building.
Policy making.
Indicate tourism sectors and product developments which need to be influenced by STN, such as contracts, national parks, accommodations, water resources, local communities, transport etcetera.
Allowing the non-profit sector to operate and advise on Ethiopian and CRV interests
Connecting the network to the international tourism industry and intellect. Such as the WTO and World Bank .
Establishing a Ethiopian Tourism Research Centre related to Ethiopian and international universities and research institutes.
Providing the private sector by market research, besides offering investment areas.
Restricting the private sector by controlling sustainable conditions in investment contracts and rules and regulations.
Monitoring, analysing and conceptualising the tourism industry in terms of social, ecological, cultural and economical sustainability. Introduction of tourism impact studies, such as carrying capacity and the relationship between water resources and industries.
Establishment of a water resource management system in collaboration with responsible agricultural and industrial governmental bodies.
Empower local authorities on controlling and sanctioning particular aspects of tourism, such as the socio-economic and quality of local accommodation.
Defining and reconstructing legislations, rules and regulations.
Establishing projects and programmes by STN member.

Several steps will have to be taken in order to implement a STN, probably more or less steps than the exact list above. Above mentioned steps are related to the institutionalisation and challenges mentioned in chapter 4 and gives a clear indication of adopting a Sustainable Tourism Network approach.

5.5. Scenario 3; Macro-micro economic approach

The macro-micro economic scenario presents the decentralised and economic approach in the scenario matrix. Central are regional and local authorities focussing on economic development. This scenario follows a mainly public and private sector ruled approach and is inspired by the plant-market match model of Taylor[28] (in: Gunn:2002:37) which is a macro-micro system of tourism planning and a useful guide for designers of specific tourism projects too.

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[28] Taylor, G. D. (1980) How to Match Plant with Demand: A Matrix for Marketing. Tourism Management, 1 (1) March: pp: 56-60.

The Year 2020 will illustrate a regional development approach which will put the CRV on the map as a tourism destination, domestic and internationally. Current conditions are in favour of this approach since the regionalisation of the public sector took place during last decades. Most important step to be taken is the establishment of an adequate policy towards tourism development.

5.5.1. The year 2020

In the year 2020 local and regional authorities design, execute and manage tourism developments. This form of development looks like the structure of the Swiss tourism industry. Cantons within Switzerland autonomously design tourism development. For example promotion, marketing spatial planning are responsibilities of each canton. In this case, CRV's authorities have their own responsibility to develop tourism. Regional public sector institutions, like the regional tourism commissions, Woreda and municipalities, are in charge.

The regional tourism commission has a clear idea about CRV's tourism attractions and its development. Together with local tourism commissions attractions are identified. The regional tourism commission composed a list of potential attractions in the CRV, including potential pathways for development. Related problems and challenges are identified as well, those can be of all kind and are brought up by local tourism commissions during the direct contacts between local and regional tourism commissions. Priority is out-sourcing the development of attractions and accommodations. As such, ASLNP will be privatised. But, when particular activities can be executed on a more local level the regional tourism commission out-sources and assigns local authorities to do so.

Investors are attracted by those listed tourism attractions. Within their network and outside they look for investors to develop a particular attraction. Land use policies offer opportunities for investors to buy land and construct accommodations. Investors have to sign their contract at the regional investment commission under state and federal laws. Conditions in the contract are defined by the regional tourism commission. The final contract is determined by the regional investment commission. Although every region has its own conditions, some conditions are collectively put in contracts as they are meant for all regional states. Investments are protected and supported by the Woreda, especially in terms of the relationship with their environment.

Regional tourism commissions are responsible for the security, quality, socio-cultural and ecological impact of tourism in their region. As a result tourist police might be introduced for specific locations. The regional tourism commissions assigns local authorities to safeguard tourism development by monitoring, controlling and sanctioning tourism industry practices. For example, local tourism commissions are monitoring hotels, restaurant and the entertainment industry on quality and food security. In collaboration with the regional tourism commission the municipality can retrieve instruments to control and sanction their local tourism industry.

National tourism industry interests, as nation promotion campaigns, tour-operating and accessibility of the country, are shared by all regional tourism commissions together through the Federal Ethiopian Tourism Authority (FETA). The power, human and financial capacity of this authority depends on all regional tourism commissions together. This authority is the starting point of international stakeholders who would like to work, invest or operate in the Ethiopian tourism industry. Trade missions for example do start here. Annually all regional tourism commission meet each other at the Ethiopian Tourism Authority to evaluate, share experiences and

discuss common issues. This can be seen as a board of directors of the Ethiopian tourism industry. Common interests are put into policies, legislations, rules and regulations. For example, tour-operators can retrieve licenses and permits of the tourism authority, but a regional tourism commission can disallow tour-operators to operate in their region. As such, regional tourism commissions are the leading regulatory and legislative actors in Ethiopian tourism. The board of directors could also decide that foreign expertise and experience are necessary to import.

Education on tourism knowledge is regionally developed, though some aspects are developed collectively. Educational programs are mostly on nature conservation, hotel and restaurant management. Every region has its own educational institutes. Preferably, graduates are often working in the same region as where the educational institutes are. As a consequence, some regions are better than other on educational programs. This discrepancy is an incentive to keep the CRV tourism industry up to national standards. The regional tourism commissions will have to invests in their educational institutes. Tourism experts are mostly Ethiopian and work within the regional tourism commissions. Other tourism professionals are working in tourism establishments, such as hotels and tour-operating services.

Other national interests as infrastructure, water resources and security are firstly addressed regionally. Responsible regional departments do discuss developments related to infrastructure, water resources and security. When its development exceeds the borders of the region, the federal authorities come into action. For example, infrastructural developments are planned through a national program since it connects regions. The interregional infrastructural development benefits tourism industries in every region. Water resources are managed in the same way. Water dependent industries are under direct control of regional authorities.

Interest groups are lobbying to get their local issues on the agenda. In fact, the non-profit sector is not part of the decisions making process. Since the Ethiopian non-profit sector has strong links with the international development cooperation lobbying is done regularly. When the non-profit sector likes to execute project on tourism they have to get permission from the regional tourism commission. Since tourism is managed both locally and regionally, local groups do have easy access to these authorities.

As such, the CRV tourism industry is under the control of regional tourism commissions, mostly focussed on the economical dimension and for regional development. Current developments as high-standard accommodations and the privatisation of conservation areas are secured. Tourists can travel around within the CRV. They will experience differences between regions, for example concerning quality of hotels and accommodations, stage of attraction development and relationships with local communities.

5.5.2. Current conditions, events and potentials supporting this approach

There are a number of conditions which are in favour of this approach. With the introduction of the federal system in 1996 the regionalisation of the public sector was initiated. Nowadays, every region has its own regional council which represents the whole region. The council has legislative and executive power to direct internal affairs of the regions. Each region is expected to develop its own tourism development policy and strategies (HGL & GIRD 2007:9). The regional tourism commission already composed a list of potential attractions and do know what should happen to

improve its attractiveness. The ideas are presented towards developers, especially investors.

Representatives of tourism commissions already come from the region. The institutional line up of the regional state already contains and ensures local knowledge about the environment, economy, culture and social issues. This is valuable knowledge and know-how which is not available elsewhere.

5.5.3. Back casting

Several steps to be taken can be identified as a result of the future perspective and current conditions within the previous paragraphs. The regional tourism commission has to take the lead in this scenario. Within Scheme 5.3. the steps to be taken are listed, mostly short term related.

Scheme 5.3.: Back-casting the macro-micro-economic approach

Examples of steps to be taken concerning the institutional construction
Establishing an Ethiopian Tourism Authority
Empowering regional and local authorities
Improve human and financial capacities of regional and local authorities
Get to know problems and challenges related to the regional tourism industry
Policy building on regional (CRV) tourism affairs. Legislations, rules and regulation have to follow
Developing monitoring, controlling and sanctioning systems for local and regional tourism commissions.
Build partnerships among regional authorities in order to monitor relationships between tourism and other industries
Establishing educational programs and connect it with the regional tourism industry
Developing a promotion campaign and tourist information centres in the CRV
Define the position of the non-profit sector
Lobbying for limiting negative environmental, cultural and socio-economic impacts of tourism, especially related to water resources.
Trust building between citizens and authorities

The scheme illustrates several steps to be taken, most of them are basic needs. Focal point in this scheme is establishing institutions and development ideologies. From the moment this scenario is operating other steps have to be taken as well. Debate among responsible and committed stakeholders is necessary in order to define and refine this approach.

5.6. Scenario 4; Comprehensive approach for alternative tourism development

Scenario 4 is the result of a decentralised sustainable development approach. It contains all stakeholders and sustainability issues. Therefore it is called the comprehensive approach. Since the ideology behind this scenario does not have much common ground in the CRV it is called an alternative development in addition. This scenario faces a complex set of stakeholders, participants and issues. The intention of the ideology behind it, is to incorporate the interests of all stakeholders and social, cultural, environment and economical issues.

The Year 2020 shows a tourism industry which meets all sustainability and consultancy standards. As a result, all CRV tourism products do have maximum

possible positive impacts on the society, economy or nature. To achieve this, a culture of consulting each other needs to be established. Developing an adequate management system is necessary as well. Most important condition which is in favour of this scenario is the existence of interest groups. Especially local groups, which are not formally organised, but full of ideas and interests concerning tourism developments in their area.

5.6.1. The year 2020

In the year 2020 the Oromia Tourism Commission has a strong policy which incorporates all stakeholders affected and those who have interest in tourism development in the CRV from a bottom-up approach. The latter means local tourism commission, which are also incorporating all stakeholders, do have an important say in the decision-making process. In comparison with the macro-economic model this model illustrates the opposite situation. Tourism development is completely depended on the process between all concerned stakeholders from a local level. Principally local interest is at stake and all sustainable issues are in focus. This is set down in the regional tourism policy.

The regional tourism commission established a policy with a focus on sustainability, Corporate Social Responsibility and other concepts which contribute the development of a 'smokeless' tourism industry. Besides the regional tourism commission a local tourism commission is established. Local tourism authorities are assigned to apply the policy and related concepts. This means strong partnerships with the non-profit and private sector on all its aspects. From the local to the regional level the tourism commission is working together with all kinds of stakeholders, such as hotel associations, guiding associations, municipalities, local communities, environmental interest groups, local experts, entertainment industry executives etcetera. Each group has an equal say in the decision making process. Each stakeholder which proposes a tourism development project is exposed to the interest of other stakeholders affected by it.

Experts are first locally searched and consulted. If necessary, expertise is consulted nationally and/or internationally. Experiences from other regions within Ethiopia are used regularly. Because of the collaboration of all stakeholders there are strong links with educational programs, knowledge, investors all around Ethiopia.

Each local tourism commission analyses its area on tourism potentials, this is an assignment within the policy. By identifying attractions, stakeholders and interest groups are identified. Identification of stakeholders is mostly done by looking at the impact on the livelihood of stakeholders. If environmental issues are at stake expertise and interest groups are consulted before decisions are made. For example, communities residing in the surroundings of a resort do have a say in the local tourism commission towards this particular tourism establishment. A hotel might use all available water resources of the surrounding area making the livelihoods and agriculture of surrounding communities insecure because of decreased water supply. Problems from a community and resort perspective are addressed within the local tourism commission. The local tourism board will mediate and look for legal solution. As a consequence, communities might get access to the waterworks system of the hotel, or the hotel might have to decrease its activities, or both. In order to create benefits for local communities and improve their relationship with tourists this system is used. The local board might contact the regional tourism commission to manage this process. Legislation and juridical tools are used in order to force stakeholders solve particular problems. Local tourism boards will report these problems and

challenges. So, other local boards and the regional tourism commission can use this experience as well. When communities, companies, professions are not organised they are asked to associate in order to define their interest better. Those stakeholders are consulted whenever a tourism related provision has to be made.

Public, private or non-profit sector institutions can approach the regional and local tourism commissions for everything related to tourism. Because the regional tourism commission involves each interest, water related problems in the CRV are relatively easy to address by agricultural smallholders. Their interest is at stake in this scenario. For each problem the same process of involving and consulting all stakeholders is started. When the interest of a stakeholder exceeds the local tourism commission mandate or responsibility, requests will be referred to a higher level.

On the national level the Ethiopian Tourism Commission is established. This commission is working on for example promotion campaigns and the accessibility of Ethiopia. Issues related to sustainable development as for example water use and security are managed on this level as well. Regional tourism commissions are working together on establishing national tourism policies and legislation based on there consultation of local tourism commissions and stakeholders around tourist attractions. For example, food safety might be a problem mentioned in some areas. Brought together in the regional tourism commissions and reported to the Ethiopia Tourism Commission a national standardisation program for food safety is established and executed.

The Ethiopian Tourism Commission is developing an Ethiopian tourism brand. National symbols are used in marketing abroad, but regional symbols are presented as well. Ethiopia's poor image is changed into an image of diversity, cultural and natural richness. This image is justified since the tourism industry is doing its best to ensure that tourism is contributing the most to the development of Ethiopia. The image of underdevelopment is changed from a destructive process into a constructive process since this approach of tourism development is an open process of development.

Investors in the tourism industry are referred by the Ethiopia Tourism Commission and Investment Commission to the regional tourism commission where they want to invest. The regional tourism commission defines conditions within the contract in collaboration with the local tourism commission. As such, the regional tourism commission is accommodating tourism development under rules, regulations and policies which are the result of bottom-up, collective and collaborative arrangements. Sustainability and responsibility are always returning issues in any arrangement. Each investment can market its establishment on its efforts of sustainability and responsibility, which is commercial appealing aspect.

The CRV tourism industry became in this scenario of the comprehensive approach for alternative tourism development as much sustainable as possible. Tourism products do have a positive impact and contribute to the overall development of Ethiopia. Social enterprises, eco-friendly tour-operators and cultural sensitive restaurants are examples of tourism products. Existing products, like resorts, are turned into Corporate Social Responsibility (CSR) enterprises contributing to socio-economic development. Tourism development within the CRV and all over Ethiopia is known as democratic, sustainable, fair and inclusive. Those characteristics are determining tourist experiences as well. They will visit the CRV and experience nature and culture as it is designed by CRV's society.

5.6.2. Current conditions, events and potential supporting this approach

Most important conditions and reasons for this approach are the current problems and challenges. Those problems and challenges are directly related to CRV's society and its environment. This approach incorporate interests of the natural environment and all stakeholders affected and which do have interest in the tourism industry. This study showed that the average number of stakeholders on a tourism attraction is four, representing the public, private and non-profit sector. Local knowledge and tourism experts can be consulted since tourism knowledge is available, but yet unconnected to the tourism industry constructively.

The comprehensive approach for alternative tourism development is possible since almost all stakeholders are in favour of tourism development. Partnerships seems to be easy to build since willingness and expectations show similarities. CRV authorities are willing to work together with stakeholders from the private and non-profit sector, because they are looking for opportunities to develop their region and increase the capacities of its operations. The non-profit sector is willing to build partnerships with the public and private sector, since their working fields are affected by them. The private sector is looking for a supportive environment. A sustainable industry is of their interest, especially from a commercial perspective. Local communities are looking for ways to secure their livelihoods, especially on water and food supplies. This scenario illustrated a strategy which contribute to these objectives. So, all these conditions and needs support this scenario. In order the fully develop CRV's tourism potentials and meet the needs of those involved a more comprehensive approach for alternative development is required.

5.6.3. Back-casting

Within this paragraph the institutionalising process and building of a development ideology is illustrated. Various steps has to be taken today in order to apply the comprehensive approach for alternative development. The Oromia Regional Tourism Commission is the leading actor, but during the process of implementing this approach power shifts towards local levels and private and non-profit sector are needed. In scheme 5.4. the most obvious steps to be taken are given.

Scheme 5.4.: Back-casting comprehensive approach for alternative development

Examples of steps to be taken concerning the institutional construction
Institutionalise a network of tourism commissions, locally, regionally and nationally. Allocate power among each level.
Define the assignment of the national tourism commission (e.g. promotion and standardisation)
Establishing a binding tourism policy on a regional level incorporating sustainability and multi-stakeholder approach.
Establishing legislation and juridical tools to ensure the position of stakeholders and development ideology. As an incentive of moving forward.
Involve public, private and non-profit sector (associations and organisations) within each tourism commission
Building common sense within each tourism commission, inspired by the regional tourism policy.
Define tourism areas, initiate local tourism boards and assign them to identify (potential) attractions and products.
Allowing local tourism boards to design tourism development.

Involve all stakeholders related to a tourism product and attraction within local tourism boards. These stakeholders have a say in the decision making process.
Establish a network of tourism expert regionally and nationally.
Educate society on tourism and instruct tourism professionals. Tourists have to be educated as well on Ethiopia in order to improve the relationship between guests and hosts.

Scheme 5.4. shows eleven steps to be taken. Each step ensures the success of this approach even more. Since this scenario seems to be contradict current developments in Ethiopia, steps to be taken has a institutionalisation and ideology character. Current ideologies, structures and management of tourism development have to change (dramatically) in order to achieve the year 2020 as described above.

5.7. Debating the scenarios

In previous paragraphs each scenario is described in terms of institutional development and tourism development ideology. In this paragraph a discussion will be started on the pro's and cons of each scenario. This paragraph will look for answers on the questions *what if* … tourism would grow or *what if* … a particular scenario would be implemented. Its consequences will be compared and enlarged. It will become clear that each scenario does have its constraints and advantages. This paragraphs consist of three sub-paragraphs covering the tourism industry as a system, social and cultural issues and institutional structures. As such, potentials and challenges are forming the guideline of tourism development.

5.7.1. Implementing a tourism system

This sub-paragraph covers tourism development related to the overall economy and the natural environment. As such, Ethiopia's image, marketing, educational and professional capacities, sector approach, infrastructure, safety, security and environmental concerns are discussed in relation to each scenario.

Clear is that the four scenarios do differ on their sector approach. In the scenario matrix this is illustrated by the economic or sustainable development model. Noteworthy to state is that nowadays the Ethiopian tourism industry can be described as an economic model which is implemented at a national level. An economic model on national level questions the sustainability of CRV's tourism industry in terms of for example economic leakage and links with local economies. Implementing a sustainable development model would mean a shift in the CRV and throughout Ethiopia in terms of economic management. Making a tourism industry sustainable would mean implementing numerous systems, rules and regulations which could affect the competitive position of Ethiopia internationally. But, the current model of macro-economic development is not benefiting the CRV tourism industry either and internationally Ethiopia is a very small destination. In fact, the continuity of CRV tourism is challenged and even threatened in some cases.

The four scenarios address the poor image of Ethiopia. Promotion campaigns are important instruments for dealing with this image. But, all scenarios will encounter difficulties changing Ethiopia's image. Since the image is partly produced abroad due to messages and images from the media and non-profit sector it might be difficult to exercise power on this. All development approaches need to establish strong promotion strategies in order to attract more tourists, preferably tourists which do not come after the poor image. So called poverty tourism. Limiting the influence of media and non-profit sector can be done by involving them in the planning process as in the

sustainable development approaches. The economic development approaches, which do not involve them, could influence or even use their power by juridical tools or through conditioning non-profit sector information strategy practises (e.g. fundraising and country reporting) in Ethiopia and abroad. But, such information strategies often result in financial aid, which could be of interest of those leading the economic approaches. Improving an image is not only of interest of a tourism industry, but also of the society. Ethiopians would benefit from a positive image in terms of confidence, perceptions and local movements for example. Evidently, promotion and marketing need to be based on a strong strategy with a focus on relevant information flows in order to change Ethiopia's image completely.

Naturally, marketing could be approached best in an economic development model since it originates from the nature of the private sector and a public sector which is attracting investors. A non-profit sector, as in the cases of the sustainable development approaches, does have another perception of marketing which could result into conflicting agendas between the various sectors. Another challenges is the need to market the CRV. Paragraph 4.2. stated that the CRV is not well marketed and has strong competition of the historic northern route and pastoralist communities in the far south. Decentralised approaches would be more interested of marketing CRV than a macro approach. The stakeholders in decentralised approaches are mandated to market the CRV and not any other region. So, all together, it can be argued that a decentralised, economic approach seems to benefit the CRV most in terms of marketing. In the scenario matrix this approach is demonstrated as the macro-micro economic approach. Although on a local and regional level their seems to be not enough financial capacity to execute a marketing campaign, hypothetically, a macro-micro approach as described in paragraph 5.5. might attain sufficient money to execute a marketing campaign.

Educational and professional capacities are important for a tourism industry. For example, in order to keep tourism products authentic or non-theatrical[29] for tourists which are becoming more and more critical tourism intellectuals are necessary. Another challenge is combining two disciplines in CRV's tourism industry, namely: hydrological research and tourism studies. Tourism professionals in terms of hotel management and tourist services are in focus of the economic development approaches. Tourism intellectuals in terms of higher and scientific education do approach tourism impacts in another way than tourist service professionals. All scenarios might recruit the necessary expertise, but it is up to ruling stakeholders, in CRV's case governmental bodies, whether scientific and sustainability concepts will become part of educational programs. Those kind of educational programs are scarce, which mean that developing such programs would claim capacities of the sustainable development models. The Sustainable Tourism Network would attain more easily human and financial capacities to develop a network of educational programs in Ethiopia and CRV since relatively 'well-of' (inter)national stakeholders are the leading actors. In general, the centralised approaches might obtain more easily international expertise on all kinds of issues. With the macro-economic approach national tourism authorities would contact neighbouring countries on experiences and expertise. The Sustainable Tourism Network This would more easily contact expertise from western countries since their network is leading them to those experts. So, on involving international expertise and experience the centralised

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[29] Tribes in Southern Ethiopia does show their cultural habits for tourist. Since some tribes do have hunting habits they started hunting everyday on mammals to show tourists their culture. As a result experts are talking about extinct mammals within this region, which is designated as a national park.

scenarios might have their preferences. Decentralised approaches might have difficulties reaching international experts. Human capacities do benefit a tourism industry, especially an international orientated tourism industry would be benefited by international expertise and experiences from all corners of the world. Clear is, that since expertise is scarce it might take some years before educational development would result into Ethiopian tourism professionals.

Infrastructural development has been important for the CRV. Interregional infrastructure in terms of asphalt has been improved in the last decade. For a growing tourism industry regional and local infrastructure is necessary. The economic development models would be the most pragmatic concerning infrastructural development. Decision making processes will be less complex as the sustainable development models. Especially the macro-economic approach would be effective since it is executed on a national level.

Safety and security are partly intangible assets of a tourism industry. The Ethiopian tourism industry is challenged by security and safety issues. The CRV is affected by this and does have safety issues as well. All scenarios takes safety and security into consideration. Since the sustainable development models represents the public, private and non-profit sector it seems to be more easy to avoid security and safety conflicts. But, security and safety (e.g. food safety) needs effective control and standardisation. An economic model could develop a strong monitoring and sanctioning system which is less easy to be corrupted since the majority of tourism stakeholders are not part of the decision process. Security issues like political conflicts are of the national interest and normally are out of the control for any tourism industry. National security issues are a typical vulnerability factor of tourism industries. On the contrary, hypothetically, tourism development could have a positive impact on achieving peace.

Environmental attractiveness seems to be of the interest of the sustainable development models the most, although privatisation of conservation areas could have positive impact on environmental protection as well. The decentralised approaches seems to be less favourable for managing environmental concerns since professionals, physical and financial capacity are scarce on regional levels, problems are critical and a supportive environment is lacking. For the centralised approached it might be more easy to retrieve human and financial capacity and implement supportive legislation for nature conservation. But, local solutions are needed as well. Cooperation with communities living inside natural areas and (surrounding) industries is necessary to establish. The decentralised approaches put local interest more central. So far, the current centralised approach did not resulted in adequate management of ASLNP. Local solutions, human and financial capacities for nature conservation are needed. The Sustainable Tourism Network approach posses those. This would not mean a Sustainable Tourism Network has to be implemented, but on nature conservation this or similar approaches seems to be benefit the rehabilitation of conservation areas.

Water resources are a very critical factor in the CRV. Consumptive needs of agriculture, all CRV industries and households have to be balanced. To do so, a regional approach is necessary and all means (e.g. human and financial capacity) might be needed. Firstly, the relationship between tourism and water has to be quantified in order to develop a management plan for the whole region. Each scenario will face this challenge. The sustainable development approaches do take environmental concerns serious. Since all means are needed, the Sustainable Tourism Network might be the most adequate approach.

5.7.2. Social and cultural components of tourism development

This sub-paragraph covers social and cultural development of CRV's society in relation to tourism. As such, hospitality, perceptions, willingness, expectations and the upcoming sex-tourism industry are discussed. The relationship with each scenario is central as well as constraints and advantages towards social and cultural development of all scenarios together.

The four scenarios do contribute to the hospitality of the CRV, but differ on their approaches. The macro-economic approach aims to have a hospitality on attractions and services. The comprehensive approach aims to achieve hospitality all over the CRV. To exemplify the difference, the macro-economic approach aims to achieve hospitality in a hotel while the comprehensive approach wants to achieve hospitality in the public as well. The latter is achieved by having a strong link with the society through local interest groups and other local stakeholders. The macro-economic approach achieves hospitality by educating and training personnel for tourism establishment mostly. Tourism experts are trained on the economic and commercial perspectives. The Sustainable Tourism Network aims to achieve hospitality in the public as well by involving stakeholders from civil society, but implements this on a national level. CRV's challenges concerning hospitality seems to be locally created and becoming a challenge in public areas. A tourism industry which is becoming less packaged[30], and more independent travellers, needs attention on the interaction between locals and tourists. Perceptions and understanding as a result of the interaction between tourists and locals in the public is challenging the hospitable attitude of the CRV, as argued in Chapter 4. Especially when tourism arrivals in the CRV would increase and become more prominent publicly, special attention is needed on perceptions and understandings among tourists and locals. For the economic approaches the interaction is of less concern. In order to improve the interaction education of locals and tourists might be useful. Overall, the decentralised approaches are more locally attached and could start influencing interactions by education. Schools are existing actors which can become stakeholders in tourism development. Each scenario differ on the necessity of influencing interactions, but in any case tourists and 'locals' needs to be educated in some way. In the decentralised approaches locals are better positioned and would, which increases the hospitable attitude of the CRV.

All stakeholders are willing to receive tourists if tourist arrivals would increase. Concerning willingness special attention is given to local communities perspectives. Willingness is related to expectations of local communities as is argued in Chapter 4. Tourist are welcome under particular conditions. A fair distribution of benefits are central although the current contribution of local communities towards tourism is limited. Local communities do want to join the tourism industry since they perceive it as beneficial. So, if tourist arrivals in the CRV, especially in rural communities, would increase a fair distribution of benefits will be on the agenda of local communities. Cause of a lack of human and financial capacities and problematic legal position local communities cannot get their conditions on the agenda tourism planners nowadays. Sustainable approaches, especially the comprehensive approach, would allow local communities to become involved in the decision process. Hypothetically, this would create a welcoming environment for tourists and benefits for local communities. As stated earlier, local communities concerns are not prioritised by the economic approaches, especially the macro-economic approach. As soon local

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[30] Packaged tours are organised tours which has the characteristic of transporting tourist from attraction to service, with little contact with the society.

interests do cross private sector interests solutions are sought, such as redeeming. This is normally the result of a political process where local communities and interest groups are outlawed or ignored. Especially the decentralised sustainable approaches enforces local interest groups by involving them in tourism planning and decision making process. As such, tourism development is build upon local processes, improving their legal position and benefiting local development strategies.

Ethiopia and the CRV are dealing with an upcoming sex-tourism industry, children are becoming part of this as well. From a humanitarian perspective intervention is necessary. In the sustainable approaches commitment towards intervention will be present. In fact, only a commercial point of view would make intervention difficult, although change could be realised when a sex-tourism industry would make Ethiopia commercially less interesting. The public and private sector in economic approaches also has to intervene. In general, intervention depends on the commitment of stakeholders. Commitment will be stronger when interest groups are becoming involved, such as child-rights organisation. A nation-wide program is needed to intervene, including juridical and legislative developments. Awareness raising among leading tourism stakeholders and tourists has to be implemented as well. Prevention measures can come after researching the characteristics of the Ethiopian sex-tourism industry. If tourist arrivals would increase this matter have to come on the agenda of any tourism stakeholder. Therefore, the Sustainable Tourism Network would be in favour concerning proceeding against a child-sex tourism industry. Since the Sustainable Tourist Network is working (inter)nationally and involves interest groups. But, local solutions are needed as well. On a local level information sharing and education could prevent locals of participating. Such a condition would prevent Ethiopians from having a sex-tourism industry. A comprehensive approach is working closely with local groups and could be more effective concerning implementing prevention programs. In general, when sex-tourism grows so will the need to combat it systematically. Prevention would be more efficient and effective. Combating sex-tourism, especially child sex tourism, needs commitment and involvement of local, national, regional and international stakeholders. The Sustainable Tourism Network seems to shape a supportive environment for such occasion.

On social and cultural issues the sustainable approaches seems to be more adequate tourism development strategies. Since socio-cultural and socio-economic issues are produced locally, decentralised approaches could be more effective than centralised approaches on these local issues. As such, the comprehensive approach could become most effective and adequate strategy dealing with social and cultural problems and challenges, although the Sustainable Tourism Network will introduce the international stakeholders needed in some occasions.

5.7.3. Institutional development behind CRV's tourism industry

This sub-paragraph covers institutional developments behind CRV's tourism industry. Rules, regulations, contracts, leadership, power, partnerships, expectations and oppositions in the public, private and non-profit sector will be discussed. Institutional development will be related to each scenario. All scenarios together will be compared and enlarged on these issues.

When the CRV tourism industry would grow, pressure on rules and regulations will increase simultaneously. All approaches might construct effective rules and regulations, but the sustainable approaches might have difficulties with the decision process on rules and regulations. The decision process of the sustainable

approaches is more complex due to the number of participating stakeholders. Rules and regulations have to represent the ambition of all involved stakeholders. The sustainable approaches represents the public, private and non-profit sector. The decision making process might be difficult due to conflicting interests and unequal allocation of power, human and financial capacities. Establishing and implementing rules and regulations would by more efficient and effective under a economy focussed regime. But, the economic approaches does have other values than the sustainable approach. The content of rules and regulation depends on the values of tourism planners. Once sustainability becomes part of the decision making process, complexity comes with it as well. Rules and regulations particularly have to be executed by the public sector. CRV's public sector have to discuss to what extent private and non-profit sector should be part of the decision making process of establishing rules and regulations.

Conditions in contracts are determining CRV tourism industry. When investments in the CRV tourism industry would grow, conditions in contemporary and future contracts have to be evaluated, especially when companies intend to establish Public Private Partnerships. As is in the case of establishing rules and regulations, conditions will depend on the ideology of tourism planners. Sustainable approaches would prefer environment, social, cultural and economical conditions, but the decision making process would become complex because of the number of stakeholders involved. The more conditions, the more monitoring systems are necessary as well. Conditions are not meant to be restrictive, it is also supportive. For example by juridical planning land-use and land allocations. Land-use conflicts could grow due to centralised approaches which lack local attachment and interest. In general, when described approaches would be executed as proposed, involved stakeholders would be controlled and supported adequately. But, on the content each approach would differ. Conditions bring up by sustainable approaches would be opposed by the economic approaches saying that the CRV would become commercially less interesting because of complicated controlling and supportive conditions. Sustainability proponents would suggest that it is of the interest of the tourism industry itself to condition investments and developments since it could prevent cultural and environmental loss and social unrest. The content of the conditions will be the result of stakeholders decisions in each particular approach. In addition, conditions for investments and development can be established and implemented on every level, nationally, regionally or locally. Questionable is which public sector level contains sufficient capacity to establish, execute, maintain and sustain those controlling and supportive mechanisms. Currently, the public sector on the local and regional levels does not have enough human and financial capacity to do so. Empowerment of local and regional level is necessary in order to allocate responsibilities concerning rules, regulations and conditioning development. Private sector stakeholder also can be self-regulatory when it comes to their impact on the society and natural environment. Since these self-regulatory instruments are somehow voluntarily, each approach could introduce it. It is likely that the sustainable approaches will introduce such instrument anyway.

Power is a delicate topic, especially when tourism would become a focus or dominant sector in the CRV. Tourism does not have one owner. Naturally, the tourism industry is controlled by a multitude of owners, namely: public, private and non-profit sectors. This study showed that nowadays power is centralised and governmental dominated. In practise, the CRV is subjected to private sector practises since the government implementing privatisations, non-supportive and non-obligatory

policies. This study showed that local and even regional stakeholders have difficulties reaching and influencing the centre of tourism development. Each scenario has a clear line up of stakeholders. Still it is questionable which stakeholders will attain power in reality. In economic approaches it can be argued that power is allocated where money is positioned. In sustainable approaches more factors seems to determine power allocation. Moreover, leadership is distributed among a wide ranch of stakeholders which is a complex process again. In the comprehensive aproach, local interests are leading tourism development planning. But, political conditions, physical, human and financial capacities do determine the position of local interests as well. These are issues which has to be taken into account when a development strategy and line up of stakeholders is clarified. Lining up stakeholders which will manage tourism development is an important step to be taken concerning the future of tourism in the CRV. Whatever approach is chosen, institutionalisation of power is necessary in order the clarify the line up of stakeholder which plan tourism development.

Obviously, the comprehensive approach would be the most extensive network of partnerships. When the tourism industry of the CRV would grow, partnerships are necessary anyway. This study showed that partnerships on CRV tourism development among NGO's (non-profit sector) are lacking. In general, the non-profit sector is inactive when it comes to overall CRV tourism development. Partnerships between local communities and authorities (public sector) are lacking as well. In addition, cooperation between local, regional and national levels is lacking, let alone partnerships. So, horizontal and vertical partnerships are missing. Such a lack of structures is fatal in terms of continued and sustained growth. The comprehensive approach seems to address this issue since this approach establish a wide ranch of partnerships. But, a few partnerships are essential and have to be established first. CRV tourism development has to be related to other industries on water resources. This is of national interest and better addressed on a regional or national level than from a local level. Water resources seems to be most of concern of the sustainable approaches. So, the Sustainable Tourism Networks might be best prepared to manage water resources incorporating all means from a national level. Partnerships are needed in CRV's tourism planning on the most challenging issues, as water and ecological concerns. Sustainable approaches seems to be most in favour of partnerships on ecological concerns, but it might result in complex processes. So far, partnerships have not been successful either.

Expectations and oppositions in the public, private and non-profit sector are clearly showed in this study. When the CRV tourism industry would grow expectations of each sector has to become clear. So far, tourism is seen by almost all stakeholders as a commercially interesting industry which almost certainly would contribute to Ethiopia's development. This study showed also that its contribution is doubtful due to several problems and challenges. Moreover, ideologies are misused collectively and probably unintentionally, especially among non-profit sector stakeholders which are mostly eco-tourism focussed. Implications and origins of current ideologies have to become clear since it shapes the interest of each stakeholder. Common sense building is necessary, especially in the case of the sustainable approaches where all sectors are participating and expectations are allocated among more issues than the economic approaches. Structural change is needed, therefore tourism planners have to become less concept focussed and more on developing an Ethiopian program for structural change. This is a sophisticated process which is in each scenario demonstrated.

Institutionalisation is a complex process, but necessary. In each scenario at least two sectors have to cooperate on the formalisation of their approach. Complexity is high among the sustainability approaches because all three sectors are involved on numerous issues. On the contrary, the content of formalisation process of economic approaches is questionable since it might not include solutions for current and future problems and challenges.

5.8. Sub-conclusions

Obviously each scenario has its constraints and advantages. The scenarios can function as a guideline for strategy building by stakeholders. It can be concluded that one way of development does not mean all challenges will be taken. In scenario building for tourism development a dichotomy occurred. Solutions can be found in each scenario. A strategy for tourism development needs to be formulated. Each strategy will face serious socio-economic and ecological challenges. A period of change in CRV's tourism planning is necessary. Based on the current situation of the CRV tourism industry various steps has to be taken. Scenario 4 may mean the most sustainable direction of tourism development, but it has constraints as well. The sustainable approaches address the socio-economic and ecological challenges, but means a radical change of contemporary political provisions. Political provisions are known as the top-down approach by Ethiopia's governments excluding local and environmental concerns. Contemporary conditions are not in favour of many aspects of the scenarios. Stakeholders at a local level often lack human, physical and financial capacities to become a participant in tourism planning. The macro-economic approach means a continuation of current strategies. Tourism planners of the macro-economic approach have to be made aware of the socio-economic and ecological challenges. This seems to be the most likely strategy right now, but CRV's tourism industry needs a serious integrated tourism development program. This chapter gave examples of such programs. Management should be central in these programs. It is on the management issue dramatic changes are expected. The role of the public sector in the contemporary tourism industry and in each scenario is essential. Current tourism planners need to be informed about CRV's tourism industry status and future resulting into new planning and programming, either on their own or together with non-profit and private sector. The latter means a change in management. The comprehensive approach is the most drastic change in terms of management as well as tourism development planning. Changes of the management of tourism development seems to be related to the capacities of involved stakeholders. Human and financial capacities need to be set in order to effectively face the challenges. The public sector, especially on the local and regional level, does not have enough human and financial capacity to initiate particular tourism development programs, but do have the political power. A lack of human and financial capacities might result in less effective and favourable tourism planning concerning the potentials and challenges. Sustainability principles are needed in CRV's tourism planning. To incorporate these principles changes in ideology and management are needed. Power, capacities and partnerships are driving forces behind this. Whatever tourism development strategy chosen, these driving forces has to be taken into account.

It is not the intention of this study to dictate one scenario or tourism development program. All four scenarios are imaginable strategies for tourism development. Among CRV's tourism stakeholders discussions can be started in order to come up with a constructive strategy for tourism development in the CRV.

Chapter 6. Conclusions

"After we met those government officials I dreamed
about ostriches who put their heads in the ground…"
(Ethiopian Tour Guide on 19-11-2007)

6.1. Introduction

This study examined the tourism industry in the Central Rift Valley (CRV) Ethiopia in order to come up with scenarios for tourism development. This study is supported by the project 'Ecosystems for water, food and economic development in the Central Rift Valley' and the Horn of Africa Regional Environmental Network (HoA-REN). This study wants to identify potentials, challenges and future perspectives of tourism development in the CRV. So, the main research question is: *What are the potentials, challenges and future perspectives of tourism developments in the Central Rift Valley of Ethiopia?* This study identified four possible scenarios based on an analysis of potentials and challenges for tourism development in the CRV.

6.2. Potentials and challenges

The potential of the CRV as a tourism destination remains doubtless. Current CRV tourism attractions are landscape aesthetics, mammals, birds and natural attractions as hot springs and lakes. These are attractions which are already visited on a regular basis by international and domestic tourists. Resorts and hotels along the shores of Lake Langano are popular among domestic tourists, especially during weekends. International tourists do visit these accommodations regularly, mostly on their way to the north or south. For domestic tourists the CRV seems to be a popular place to stay during weekends. The CRV should focus on both groups in order to achieve a significant economic impact. But, CRV's tourism potential is limited because of its market position, competition and stage of development. Although the CRV may not distinguishes itself easily in the national or international tourism market, its potential gives reasons for market research. Focussed market research is needed to measure the potential of each attraction in the CRV.

Cultural attractions or man-made attractions are not developed and/or marketed so far. But, the CRV does have potential concerning cultural and man-made attractions. Possible man-made attractions are the hot springs and the lakes. The hot springs can be developed into spa treatment places and the lakes can serve for water-based activities like sailing and water sports. Cultural attractions are for example, the Araki Household Producers and cultural festivities. Those can be developed into a product and linked to the tourism industry. Araki is a liqueur which is traditionally brewed in households in Arsi Negele, a small town around Abijata Shalla Lakes National Park (ASLNP). In addition, CRV's birdlife gives reason for further developments on bird-watching tourism. During the past decades the CRV welcomed some conditions which benefit its tourism industry, like infrastructural development and increased number of tourist arrivals. Moreover, stakeholders in the Ethiopian and CRV tourism industry are in favour of tourism development. Ethiopia still is a relatively small tourism destination worldwide, which gives the possibility to grow in terms of tourist arrivals. The CRV might benefit from this, although the CRV will most likely remain a niche market. Knowing its tourism potential, the CRV could enforce its position as a tourist destination in the national tourism industry.

However, there are some doubts concerning CRV's tourism potential. To put it in other words, its potentials is limited due to various reasons. The CRV has become enclosed by surrounding regions in terms of tourist destinations and attractions. Pastoralists in the far south and the historic northern route are traditional tourist destinations and attractions. Among tour-operators and tourists western Ethiopia is becoming an interesting tourism potential destination in the near future. CRV's (future) position and identity is related and depended upon these regions. It enforces CRV's current 'transit area' position and identity. Nowadays, the CRV could only distinguish itself by remarkable developments, such as the huge tourism city initiated by an Arabic investor. But, the impact on the environment has to be critical analysed. At this moment the CRV could have the strongest position with an *en-route* destination system, geographically spoken and from an international tourism perspective. The *en-route* destination system would mean *base-camping* and final destinations outside the CRV area. CRV's attractions are visited when tourists pass through the CRV on their way to base-camps or final destinations.

Although CRV's tourism potential seems to be obvious, its potential contribution to sustainable development is doubtful. Some stakeholders emphasise the potential contribution for nature conservation or rehabilitation and economic development. For example, farmers could make an alternative income strategy out of tourism which would decrease their dependency on agricultural activities. As a result, limited soil degradation which is partly caused by intensive agriculture of smallholders. This study showed that local communities do perceive tourism as an additional income strategy rather than an alternative. Moreover, they have their own conditions for tourism development. Already, the host-tourist relationship is tensed causing disturbance, misunderstandings and misperceptions. Other challenges for sustainable tourism development are Ethiopia's image, security, human capacity, environmental issues, an upcoming sex-tourism industry, rules, regulations, partnerships and expectations of all stakeholders. The current CRV tourism industry, especially among existing tourist attractions, faces many challenges which questions its potential contribution to sustainable tourism development. Moreover, it gives reason for concerns about the continuity of the current tourism industry.

The relation between tourism and other economic sectors developments over natural resources is a serious challenge. For example, when agricultural development in the CRV requires water resources it will have consequences for tourism development as well. Tourism does demand a significant amount of freshwater. In Chapter 4 and estimation has been made. Based on 10.000 tourists with an average stay of two nights, tourists would consume 8.800.000 litres per annum, including all aspects of tourism industry's consumption. Challenges exceeds the tourism industry, since other industries as agriculture and horticulture do demand water as well. Water consumption is a critical challenges when tourism would grow. An integrated program of tourism development is necessary to increase the potential contribution to sustainable development.

Claiming that an integrated approach and solving challenges would benefit the CRV's tourism development, implicates that management should be behind it. But, the line up of stakeholders in the CRV tourism industry is unclear due to power allocation, ideologies, human and financial capacities. It can be concluded that the biggest challenge is the institutional construction behind the CRV tourism industry. All mentioned potential, problems and challenges are related to this. Because of a lack of foresight and strategies, unclear allocation of responsibilities and power, inadequate rules and regulations and lack of human and financial capacities the CRV

tourism industry seems to be out of control. Out of this situation various other problems and challenges occur. An institutional construction has to be established which designs a integrated tourism development program, to begin with facing current challenges and integration.

6.3. Scenario building

Chapter 5 discussed four scenarios. Those scenarios are a result of analysing the potentials and challenges of CRV's tourism industry. They give an overview of potential future perspectives. Committed stakeholders can use the scenarios to discuss and define CRV's tourism development. Institutionalisation and tourism development planning are the two most important variables determining the future of CRV's tourism industry developments. Each scenario does contain predefined institutionalisations, but differ concerning approach and priorities. In each scenario potentials and challenges are approached through development ideologies. The question remains which scenario would provide the necessary and adequate solutions related to the contemporary situation and contributes to sustained development. Each scenarios has its constraints and advantages. It can be concluded that one way of development does not mean all challenges will be taken. In scenario building for tourism development a dichotomy occurred. Solutions can be found in each scenario. A strategy for tourism development needs to be formulated. Each strategy will face serious socio-economic and ecological challenges. A period of change in CRV's tourism planning is necessary. Based on the current situation of the CRV tourism industry various steps has to be taken. Scenario 4 may mean the most sustainable direction of tourism development, but it has constraints as well. The sustainable approaches address the socio-economic and ecological challenges, but means a radical change of contemporary political provisions. Contemporary conditions are not in favour of many aspects of the scenarios. Stakeholders at a local level often lack capacities to become a participant in tourism planning. The macro-economic approach means a continuation of current strategies. Tourism planners of the macro-economic approach have to be made aware of the socio-economic and ecological challenges. This seems to be the most likely strategy right now, but CRV's tourism industry needs a serious integrated tourism development program. This chapter gave examples of such programs. Management should be central in these programs. It is on the management issue dramatic changes are expected. The comprehensive approach is the most drastic change in terms of management as well as tourism development planning. Changes of the management of tourism development seems to be related to the capacities of involved stakeholders. Human and financial capacities need to be set in order to effectively face the challenges. Especially the public sector, especially on the local and regional level, does not have enough human and financial capacity to initiate particular tourism development programs, but do have the political power. A lack of human and financial capacities might result in less effective and favourable tourism planning concerning the potentials and challenges. Sustainability principles are needed in CRV's tourism planning. To incorporate these principles changes in ideology and management are needed. Power, capacities and partnerships are driving forces behind this. Whatever tourism development strategy chosen, these factors has to be taken into account.

It is not the intention of this study to dictate one scenario or tourism development program. All four scenarios are imaginable strategies for tourism development. Among CRV's tourism stakeholders discussions need to be started in order to come up with a constructive strategy for tourism development in the CRV.

This study gives a useful leg up for determining which issues should become a priority in a development strategy. However, the scenarios are not contradicting each other when it comes to application. So, a mix of all scenarios would be interesting. There is no singular way of development. Extensive discussion between all sectors (public, private and non-profit) related to the four scenarios could lead to a common strategy for development. The position and role of the public, private and non-profit sector can be defined in this strategy for development.

6.4. Final Conclusion

As became clear previously in this report, it might be useful to analyse the CRV by three categories of stakeholders, namely public, private and non-profit. CRV's tourism industry clearly does not have one owner, it is controlled by a multitude of owners. Among the three sectors in the CRV power allocation, development beliefs and capacities are unequally distributed and contradict. Especially the Ethiopian or CRV interest groups as part of the non-profit sector are affected by the socio-economic and environmental challenges, but yet ignored and outlawed in the decision making process and development programs. This might not contribute to sustainable tourism development. Lack of leadership on this, in relation to a lack of capacities, resulted into a deadlock or standstill of CRV's tourism development. On locations where one sector is in full power, such as resort areas, support from the other sectors is vital and essential. On these locations sustainability is of the owner's interest, but their success is determined by its environment as well.

Sustainable development needs tuning among the three sectors resulting in a clear tourism development and management program. CRV's tourism industry shows challenges on geographic, economic, environmental, social, cultural and political dimensions. Each dimension of CRV's tourism industry requires basic needs development. A master plan of the region, which includes tourism, is necessary rather than one single tourism development project. Tourism development in the CRV does not need to be approached as an experiment. In tourism studies, this report and other reports on tourism in Ethiopia information and arguments are given which should be taken into account while developing a tourism planning program. Especially in CRV's situation, in which tourism development could have huge invincible negative or theoretically positive impacts on the ecological and socio-economic situation. CRV's recent tourism history envisage such a situation, and other industries already experience those critical factors. Water consumption and resources are critical factors in the CRV as well as the impact of tourism on local communities which do demand direct benefits. Proper planning, programming and management would take away some major challenges leaving an environment in which CRV's tourism potential can flourish.

Responsible stakeholders, such as governments and authorities, need to acknowledge the causes of CRV's challenges and potentials. Current rulers have to incorporate each concern and implement tourism planning changes. The private and non-profit sector could positively contribute to tourism planning. Management, leadership and common sense in terms of development ideology and strategies is necessary to establish. In the case of CRV's tourism development, the private and non-profit sector together could positively contribute to sustainable tourism development. This could happen in an environment which is determined and formulated by governments and authorities, which than recognised the potentials and related challenges. Since tourism has not one owner and CRV's deadlock in tourism development needs a breakthrough, tuning among the public, private and non-profit

sector and industries is necessary. The four scenarios of Chapter 5 are examples of that.

So, the CRV does have tourism potential worthwhile to visit and develop. But, its potential is far from being developed sustainably at this point. Whatever development belief is in favour, comprehensive strategies among stakeholders and industries has to be established. A single stakeholder might think twice to invest in tourism development in the CRV. But, the working group on CRV tourism does consist of private and non-profit sector stakeholders while public sector stakeholder are about to be invited to the group. This platform and partnership provides a big opportunity to develop CRV's tourism potential fully, with taking all challenges mentioned in this study and other studies into account. This study gives a useful leg up for strategy building and elaborated CRV's tourism potentials and challenges extensively. Until a tourism development strategy is chosen, and to be honest, tourism development should not be part of the CRV.

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- **Capital** – *editions from 15-09-2007 until 22-12-2007 – Weekly Editions*
- **Guardian** – *editions from 15-09-2007 until 22-12-2007 – Weekly Editions*
- **The Ethiopian Herald** – *editions from 15-09-2007 until 22-12-2007 – Weekly Editions*
- **Sub-Saharan Informer** – *editions from 15-09-2007 until 22-12-2007 – Weekly Editions*

IV. Lessons learned

Tourism is indeed a subject which is related to many issues, directly and indirectly. First lesson learned is the necessity to focus on particular issues related to tourism, especially when research time is limited. Methods and techniques could contribute to keep focussing, but this research conducted a wide rand of methods and techniques. Losing focus has the consequence to become a plaything of reality. There was not a clear focus point, method, technique and assignment to conduct or accomplish. Instead, collecting as much data as possible compensated the loss of focus. This has the consequence that the point of satisfaction is difficult to measure. In order not to lose focus a researcher needs to be backed by a theoretical framework which contain a clear focus, methods and techniques.

Difficult to prove and an always returning topic is whether respondents are giving social-responsible information, in this research this would be situation-sensitive or diplomatic information. Traditionally there are different standpoints among the public, private and non-profit sector. To get those different standpoints is can be a sensitive, political and diplomatic process. Because many information is gathered among stakeholders which have partnerships or working in the same field, it raises the questions in which way or whether their interest are reflected into the data and analysis in this thesis.

Another issue is how respondents approached me. Because I met stakeholders of all sort, their approach differed. Some respondents did approached me as a tourists, some as a potential investor, others as a advocator of charity, others saw me as potential useful contact for their careers. In most of the cases I was approached as a researchers. Apparently, in the other cases I failed to make clear my status of independence as a researcher. Of course, I tried to make up for this failure.

ANNEX I

List of Challenges in CRV's Tourism Industry

CRV and Ethiopian Tourism Industry

Theme	Critical factor
The poor image	-Poor image internationally -International community (Media and NGO's) Constructed this poor image -CRV's image subjected to Ethiopia's image
Competition and marketing	-Weak international market position and marketing strategies -CRV has strong competition of historic northern route and tribes in the far south -Poor image a challenge for marketing strategies -No marketing strategies for the CRV -CRV is becoming commercially less interesting due to social, ecological and economical factors
Educational and professional capacities	- (Regional) Governmental representatives are uneducated on tourism, are not informed about tourism development and are just learning by doing -Little understandings of concepts of tourism development among hotel managers -Tourism experts working within international communities (NGO's and private sector investors) -Tourism knowledge can be found among Ethiopian Diaspora around the world -Low level of scientific educational programs on tourism -No network of educational and professional capacity -Eco-tourism adopted as ideology, but used as an catch-all and meaningless term
Sector approach	-Focus on hotels and restaurants as tourism development -Privatisation of hotels and national parks -Priority is attracting foreign direct investments -Investments are not adequate development strategies for particular attractions, especially natural attractions
Infrastructural challenges	-Infrastructural development needed to increase accessibility of attractions -Tourism component of infrastructural development not acknowledged among authorities
Safety and security	-Significant vulnerability of tourism industry due to weak national security and disastrous threats as droughts -Physical security in tourism industry low due to a lack of partnerships with emergency services on

Environmental values	tour and in most of the accommodations -Food insecurities due to a lack of hygiene -ASLNP in threat due to lack of management, exploitation of local communities, industrial activities and natural processes -ASLNP grasped by Arabic investor making its future even more insecure -High level livestock and fertilisers are degrading soil quality and natural attractions -Natural attractions are not respected by authorities and local communities -Demand and supply of fresh water unbalanced. Negative relationship between tourism and fresh water supply -Problematic relationship between tourists and mammals

Social and Cultural Issues

Theme	Critical factors
Hospitality and perception between locals and tourists	-Hospitality questioned by tourists -Large-scale begging close to tourists -Throwing stones to tourists by local communities' children -Arguing, large-scale cheating and disturbance by Ethiopians towards tourists -Growing awareness of differences between western citizens and local communities due to tourism -Misperceptions concerning taking pictures by tourists -No awareness or educational programs among local communities
Sex- and romance tourism	-Upcoming sex- and romance tourism industry -Hotel and entertainment industry closely linked to sex-tourism industry -Minors becoming part of the sex-tourism industry -No condition within Ethiopian society which prevent it from having a child-sex tourism industry
Willingness to receive tourists and expectations	-Tourists are welcome under specific condition by local communities, especially those in rural areas. Distribution of benefits central. Exchange of goods and services expected -Lack of knowledge, capacity and position to realise their requirements and expectations -Contribution of local communities towards a tourism industry is limited

Institutional construction of the tourism industry

Theme	Critical factors
Rules and regulations	-Inadequate licensing and monitoring -Corruption sensitive rules and regulations -Illegal practices common

	-Standardisations of guiding, hotels and tour-operators uncontrolled, especially outside Addis Ababa -Lack of understanding and capacity to implement rules and regulation adequately
Contracts	-Weak contracting within tourism industry -Unconditioned contracting -Non-supportive and non-obligatory contracting -Legislative position of contracts low -Contracts are not related to the specific location and investment -Natural attractions and governmental hotels are given away unconditioned -Contracts and project on conservation areas not implemented
Central leadership and power allocation	-(Federal) government dominated CRV tourism industry -Power allocation related to random practices of tourism industry -Management set-up in CRV's tourism development unclear -Non-profit sector stakeholders, especially Ethiopian local interest groups, has no position in tourism planning and decision making processes
Stakeholder partnerships	-Partnerships among NGO's rarely followed up due to conflicting agenda's -Partnerships between government and (I)NGO's only on national level -Partnerships between local communities and authorities, private sector or NGO's rarely seen -Relatively low level of partnerships between International and Ethiopian NGO's on tourism development -No import of (inter)national expertise and experiences
Expectations of NGO's working on tourism	-NGO's assume tourism is beneficial, challenges rarely incorporated -Eco-tourism focussed. Used as a catch-all and meaningless term -Single focus in terms of concept, location and attractions -No structural change from NGO projects

ANNEX II

List of Participants

Name	Function	Organisation	Tel. number	E-mail	Remarks
Key-informants					
Abel Abebe	Tourist Guide Operator	Ethio Treasure	0911392432	Ethio_treasure@yahoo.com	Awassa Office www.ethiotreasure.com
Megersa	Teacher	Wondo Genet University Wildlife Management and Ecotourism	0911153102 / 0911066486	Mege.debel@gmail.com	
Consulted Stakeholders & Respondents					
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Mr. Alemu	Public Relation	Woreda Aje	0911083344		
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Mr. Andualem	Tourist Guide	Private	0916853603		
Mr. M. Asmellash	Director	Dir Foundation	0911171188		Offices in Addis Ababa and Amsterdam, Holland
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Mr. G. Butea	Chief Labush Kuka / Sembete Shala	Woreda Aje	0913390787 / 0461190245		
Mr. Dabie	Project Advisor	SEDA	0911222681		
Mr. Danea	Local Manager	Sunshine Construction	0911695574		
Mr. A. Debaba	Director	DPPC – Arsi Negele	0915549816		Study on Araki Producers
Ms. J. van Driel	Manager	Meta Meta – Royal Dutch Embassy	0912007428		
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Ms. I. Guixe	Program Manager	Oxfam Intermon	0911364223	immaguixe@gmail.com	
S. Hagos	Director	Yared Tour & Travel	0913256114 / 0462207672		Awassa Office
Mr. Haji	Director	Oromia Culture and Tourism Commission Arsi Zone	0911570530		

Name	Position	Organization	Phone	Email	Location
Mr. Hailu	Park Manager	Abijata Shala Lakes National Park			
Mr. Y. Hamda	Private Investor		0912025061	yonasikia@yahoo.com	
Mr. T. Hickey	Director	Ethio Quadrants (Tour Operator)	0911228887		
Mr. S. Hussein	Program Officer	RCWDA	0916824432		Arsi Negele Office
Mr. Ibrahim	Program Manager	SEDA	0911347723		
Mr. W. v/d Jagt	Director	Ethio Impressions	09116659358	info@untamedethiopia.com	
Mr. A. Kader	Mayor	Municipality of Arsi Negele	0911301605		
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Mr. Kediro	Chief	Kebelle West-Ziway	0913335496		
Mr. T. Koji	Program Manager	RCWDA	0911670273	rivziway@ethionet.et	
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Mr. Matewos	Head Dep. Standardization & Facilitation	Ministry of Culture & Tourism, Federal Government of Ethiopia	0911202410		
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Oromia Investment Commission			0115531526		
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Mr. Seddo	Guide	Lake Ziway	0911992574		
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Ms. E. Smulders	Value Chain Development	ICCO	0911748744		
Mr. Sultan	Manager	Nazreth Tourism Commission	0911355045		
Mr. R. Samuel	Director	Hotel Association SNNPRS	0911433661		

Mr. Tura	General Chief	Woreda Aje		
Mr. Tura	Local Guide	Abijata Shala Lakes National Park	0911707714	
Ms. E. Tolsma	HIV/AIDS Senior Advisor	IIRR	0912215577	
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Mr. J. Wandera	Senior Advisor	SNV Awassa	0916838261	
Mr. Warrio	Director	Oromia Culture & Tourism Bureau	0911842826	Addis Ababa Office
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Ms. M. Zwadneh	Manager	Teampro	0911607952	Offices in Addis Ababa and Amsterdam, Holland

Note: some respondents names or complete contact information has been left out of this list because they preferred to be anonymous.

ANNEX III

Map of attractions in the CRV

Note: Most attractions are illustrated. It gives an indication of CRV's number of potential tourist attractions and routes.