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ABBREVIATIONS AND ACRONYMS

GIDD	Gender In Development Division
GMA	Game Management Area
GRZ	Government of the Republic of Zambia
NEAP	National Environmental Action Plan
NPWS	National Parks and Wildlife Services
NHCC	National Heritage Conservation Commission
TCZ	Tourism Council of Zambia
TMD	Tourism Management Directorate
VFR	Visiting Friends and Relatives
ZAWA	Zambia Wildlife Authority
ZNTB	Zambia National Tourist Board

FOREWORD

This publication is the first formal declaration of Zambia's Tourism Policy since the attainment of independence in 1964.

In the First and Second Republics the Government of Zambia did not perceive tourism as a priority industry with export potential. However, upon coming to power in 1991, the new Government of the Movement for Multiparty Democracy (MMD) recognized the social and economic potential of the industry. The reputation of Zambia as a peaceful, land-locked nation of warm, friendly people, offering good services in a clean environment and hospitable climate needed to be exploited. The Government realised that growth in the tourism industry would require the formulation of guidelines for the industry through clear and well-defined policies. This document, which sets out the Government's tourism policy, should be seen as a positive statement of the Government's commitment to the industry.

From the viewpoint of the Government and individual citizens the tourism industry directly and indirectly provides significant employment and income opportunities for Zambians. It also contributes to the economy in terms of foreign exchange earnings, balance of payments and generates tax revenue for the Treasury. With proper planning and management of the sector, tourism would contribute even more in economic benefits to the country.

I wish to express my appreciation for the realization of this policy document to my predecessors for their vision and commitment during their tenure of office. I am grateful, as well as, for the cooperation of the tourism industry. The industry has provided invaluable information, ideas and advice during the consultative process leading to the production of this policy document.

Lastly but not least, I wish to pay tribute to the dedicated members of staff of my Ministry for successfully fulfilling the mandate of producing this policy document.

I hope and trust that this publication will assist in the successful implementation of Zambia's Tourism Policy by all stakeholders.



Patrick K. Kalifungwa , MP
MINISTER OF TOURISM, ENVIRONMENT AND NATURAL RESOURCES

CHAPTER 1: BACKGROUND TO THE TOURISM POLICY

1.0 THE PROCESS LEADING TO THE TOURISM POLICY DOCUMENT

The contents of this Policy Document were first produced in 1997 as a follow up to the Medium Term Tourism Strategy following a consultative process undertaken by the Ministry of Tourism. These policies were approved by Cabinet in July 1997 but were not published. In 1998 the Minister for Tourism requested a review of the policy proposals with the intention of refining and publishing a policy document that would be accessible to all stakeholders.

Two 'Policy Review' workshops were held in September/October 1998 involving participants from the private and public sectors and institutions concerned with tourism. An 'Ownership and Action Plan' Workshop was also held in Siavonga in June 1999 to conclude this process. Finally, an Editorial Committee within the Ministry of Tourism ensured that proposals for refinement of the policies were taken into consideration in accordance with the policies approved by Cabinet in July 1997.

1.1 Background to the Policy Situation

The advent of the Third Republic on November 2, 1991, brought in a changed macro-economic environment in which liberalization and increased private enterprise participation in the economy have become the norm. The Government of Zambia (GRZ) decided that the tourism industry development should be led by the private sector with the public sector providing the necessary enabling environment through appropriate policy measures and support infrastructure improvements. Consequently the Government has divested itself of business enterprises which it previously operated. The process of divestment and privatisation will continue.

Similarly the Government has proceeded with substantial institutional reforms which affect all the organisations in the tourism field including the Zambia National Tourist Board and the National Parks & Wildlife Service, National Museums Board and National Heritage Conservation Commission.

This policy document provides the guidelines and general aims of the Government for tourism development. It also gives a clear statement of the Government's intentions towards the tourism sector. It is a positive statement by Government intended for tourism stakeholders in the private sector, government institutions, investors, local communities, as well as the general public. It addresses both the demand for tourism products and the supply of facilities. It also indicates the role tourism constituents shall play in the development of the sector.

As a supplement to this policy document, the Ministry of Tourism has prepared a 'Zambia - Tourism Objectives and Strategies' Document setting

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out measurable objectives for tourism along with the strategies required to meet these objectives.

1.2 The Role of Tourism in National Development

In 1996, the Government reclassified the tourism sector from a social to an economic category. This was recognition of the sector's potential to contribute to economic development in terms of, *inter alias*, foreign exchange earnings, employment and income generation, contribution to Government revenues, promotion of rural development and as well as perform the role of a sustainable development catalyst.

As Government continues to privatize its assets and activities and creates an enabling business environment, it is expected that the private sector will rise to the challenge to help the country achieve the set national objectives.

1.2.1 The Zambian Economy – the Context for Tourism

Zambia is a large country with a low population density, offering a unique potential for tourism, especially for those seeking wilderness experiences. However, the large size of the country creates challenges in providing infrastructure.

Zambia's traditional reliance upon primary products, especially mining, combined with a rapidly growing population has meant that social and economic conditions have been difficult for some years leading to wide disparities in income distribution. In this context, the tourism industry offers unique opportunities to Zambians in urban and rural areas alike for diversification, growth, new economic activities and jobs.

The social and economic conditions, however, present a challenge to the tourism industry. It is essential to ensure a harmonious interface between tourists, who come mostly from the developed industrial countries, with the local population of a developing nation - whether the local people are working in the industry or just coming into contact with tourists in the course of their normal day's activities.

1.2.2 Employment, Jobs and Local Incomes

The Tourism Industry provides jobs for local people in urban and rural areas. However, there is a need to increase local direct jobs in tourism in order to benefit as many local people as possible.

Through the multiplier effect even more jobs are created indirectly as a result of the subsequent spending by the recipients of the tourists' initial expenditures. The multiplier effect arises from an injection of new money into

the economy by way of tourist spending on transport, accommodation, food, shopping and in other businesses.

The businesses benefiting from the tourist expenditure in turn are able to spend and pass on the benefit to their staff, suppliers, and meet tax and other obligations. This flow of income continues as new recipients in turn spend their income on goods and services in the economy creating further incomes and jobs, as well as tax revenues to the Government. It is in this light that the tourism industry has a key role in the national economy as a source of economic growth, provider of jobs and incomes.

1.2.3 Foreign Exchange Earnings

A Pilot Visitor Survey carried out by the Ministry of Tourism in 1998 estimates that International Visitor Expenditure in Zambia was around US\$ 100 million. There is potential to double these earnings over the next five years. The tourism industry will, therefore, continue to be a key source of foreign exchange and improve the balance of payments position of the country.

1.2.4 Contribution to Government Revenues

A conservative and preliminary estimate of the Ministry of Tourism of Government revenue deriving from tourism spending is US\$ 18 million, making the tourism industry a major contributor to Government funds.

1.2.5 Sustainable Development Catalyst

The tourism industry has encouraged the development of skills and the emergence of support activities that have contributed to the level of economic activity in Zambia. The tourism industry is a purchaser of many different goods, services and human resources – a much wider range than most other industries, so stimulating economic activity on a wide front.

The list of skills and activities is too long to enumerate here but it is not restricted to the obvious candidates such as hotel waiters and chefs, but extends to domestic airline pilots, to hotel gardeners, to craft workers and so on. Support activities will vary from accountancy services to agricultural suppliers.

1.2.6 Domestic Tourism

The potential importance of domestic tourism in national economic development needs to be recognised, not only as a desirable activity for the domestic population but also as a contributor to local jobs, local incomes and local education and measure of the standard and quality of life of Zambians.

1.2.7 Rural Development

In light of the foregoing the tourism sector is pivotal in bringing development to rural areas. Given the fact much of the tourism resource is located in the rural area the industry is a powerful instrument in creating jobs, incomes and poverty alleviation in rural areas.

CHAPTER 2: TOURISM POLICIES FOR ZAMBIA

2.0 TOURISM SECTOR MISSION STATEMENT

Chapter One has introduced the tourism industry and indicated the considerable role that it plays and can play in the future economic development of the country. This role is a compelling reason for having a policy framework that enables the industry to contribute benefits in the form of jobs, local incomes, foreign exchange, contributions to Government revenues and sustainable development.

This Chapter sets out the general policy framework within the context of the mission for the tourism sector. It also sets out the Government's stance on key aspects of tourism development such as product development, human resources development, Land Use and Environment etc.

The mission for the tourism sector is:-

"To contribute sustainably to the economic well-being and enhanced quality of life for Zambians through Government led, private sector driven, quality product developments that are consistent with the protection of the unique natural and cultural heritage".

2.1 Policy Aims

Within this overall mission, the priority aims of the Government are to:-

- ◆ bring about growth in the tourism industry through the encouragement of the private sector;
- ◆ redistribute both the opportunities to participate in tourism growth, and access to the benefits from it, towards Zambians;
- ◆ ensure that such equitable growth is environmentally sustainable and will be accessible to future generations;
- ◆ diversify the tourism product from being mainly wildlife based;
- ◆ carry out necessary legislative and organizational changes to facilitate development in the sector;
- ◆ raise public awareness of the national significance of investment in and promotion of tourism;
- ◆ promote domestic tourism, leisure and recreation;
- ◆ promote initiatives for regional tourism co-operation;

- ♦ promote proper investment incentives in Zambian wildlife, cultural tourism, and in the tourism product;
- ♦ improve tourist infrastructure – roads, railways, airports, telecommunications - and other supporting facilities;
- ♦ seek to help the industry to create more local jobs, to generate more local incomes, to earn more foreign exchange, and to contribute more to Government revenues as a result of the improved business climate and the improved viability;
- ♦ facilitate the availability of local supplies to the tourism industry;
- ♦ improve the national tourism administration so that it helps the tourism industry to be competitive and viable, and
- ♦ to encourage and assist Zambians to own and manage hotels, lodges and other tourist facilities.

2.2 Human Resource Development

Tourism is a vital source of jobs for Zambians. Government will encourage substantial training, retraining and motivational tourism programs for all who are, or would be, part of the tourism industry

Government will address the training needs on a broad front to improve employment prospects in the industry, including the accommodation sector (hotels, lodges, safari camps), the travel trade (the inbound and outbound operators), the heritage and the wildlife sectors. The important national administration of tourism, where there is a substantial need for capacity building will also receive considerable attention. Existing training initiatives will be supported and new ones will be encouraged.

2.3 Product Development

The product development approach for Zambia will continue to be based on its reputation for wildlife and wilderness adventure. Whilst recognizing the importance of the wildlife and wilderness product in tourism, the Government is committed to the concept of product diversification. Such diversification will be encouraged both within the wildlife sector and for other tourism products such as culture and heritage, traditional ceremonies, domestic tourism, community based tourism, eco-tourism, conference and incentive travel, sports and recreation tourism.

2.3.1 Priority Areas

Investment in new tourism products will be encouraged in priority areas, which will be identified as having competitive advantage whether targeted for domestic, regional or international tourism. Development foci will be identified, prioritized and updated in consultation with the private sector that will be expected to provide the necessary investment.

Development of tourism in National Parks, particularly in Game Management Areas, and selected heritage sites in the country, will involve full participation of local communities. It is intended that the participating local communities benefit from natural and cultural resource-based tourism development in terms of employment, income and entrepreneurial opportunities, and possibly, through partnerships or independent investments or shareholding.

2.3.2 Infrastructure and Transport

Infrastructure will be provided and improved in those areas with high potential for tourism development. The successful development of Zambian tourism is dependent upon reliable and affordable transportation systems. Currently the transportation infrastructure in tourism is under-developed.

While infrastructure and transport development falls within the ambit of other Ministries, the Ministry of Tourism will coordinate and cooperate with other Ministries for the purposes of encouraging tourism development.

2.3.3 Coordination of Policies and Inter-Sectoral Linkages

Transport and telecommunication are so important to tourism, that the Ministry of Tourism will continue stressing the coordination of these sectors and tourism policies, at all levels – international, regional, even local councils. The MOT will also ensure that coordination takes place at the level of the individual providers of infrastructure and services – National Airports Corporation, National Roads Board etc.

The coordination role of the MOT extends beyond the transport sector to the many other agencies that come into contact with tourists, tourist facilities and tourist enterprises and agencies concerned with activities such as customs, immigration, environment, trade etc.

2.4 Land Use and Environmental Considerations

It is Government Policy that the tourism sector in Zambia will act responsibly with respect to the sustainable use of the environment at all times. In general, the tourism industry shall be in the forefront in adopting practices that enhance the sustainable use of the environment.

The Government will continue to encourage these practices such as sustainable waste disposal, green packaging and recycling, water and energy conservation, integrated environmental management, social and environmental audits. Tourism development has to take place within the context of the National Environmental Action Plan (NEAP) and Management Plans.

Government policy is to ensure that tourism development does not deprive local communities of access to those resources along banks or shores of rivers, dams, lagoons, lakes needed for their livelihood.

Government will actively promote tourism development in areas where tourism offers a competitive form of land-use and ensure that tourism is integrated into land-use plans for such areas.

An Inter-Ministerial Committee on 'Infrastructure and Land Use' will be created in the proposed tourism development priority areas, in order to help encourage and steer tourism development.

2.5 Tourism Promotion - Marketing

The Government recognises the importance of promoting Zambia in the various markets and market segments. The Government is committed to ensuring that the national tourism promotional organisation becomes much more effective and vigorous in its promotional activities. Marketing will be a key instrument in securing a large increase in tourism business. Priority will be given to increasing market share in established markets and achieves successful entry into new markets.

2.5.1 Markets

Zambia's tourism industry, through the Zambia National Tourist Board responsible for marketing, will continue to target tourists from markets with high travel and propensity to spend. Advertising, publicity and public relations, trade and consumer promotions will operate to achieve this objective.

2.5.2 Market Research

In order to be competitive, in marketing of tourism, the Ministry of Tourism will support efforts aimed at researching the needs of tourists in targeted markets. Research shall be conducted every year to determine needs of customers in the source markets.

2.5.3 Product Development and Innovation

Products have a big bearing on the success of tourism. In order to ensure that Zambia has quality products that can give competitive edge to the country, the Ministry of Tourism will encourage creativity in the area of product innovation and development through relevant institutions.

The Ministry of Tourism through the Tourism, Planning, Management and Co-ordination Directorate will support the promotional efforts by providing essential inputs such as research, development strategy, funding, coordination, training and awareness.

2.6 Regional and International Cooperation

Zambia will cooperate with other countries in enhancing the role of tourism in the process of regional integration. Zambia will participate in and support those regional institutions that are important catalysts to bond regional tourism cooperation and to promote regional marketing and the development of regional circuits.

Government recognizes the vital role that regional integration and regional organisations play in the development of tourism in Zambia. In that regard, Government recognizes the Regional Tourism Organisation of Southern Africa (RETOSA) as one such Southern African Development Community (SADC) institution, involving both public and private sector decision-making, for the advancement and promotion of regional and national tourism development.

Government will continue to subscribe to the World Tourism Organisation and actively participate in its programmes that have a bearing on the tourism interests of the Country and its tourism policy.

Joint initiatives will be mounted leading to bilateral/multi-lateral promotional ventures with countries sharing common resources like the Zambezi River and Lake Tanganyika and their respective attractions. Given that precious wildlife, natural resources and ecosystems transcend Zambia's borders (e.g. Victoria Falls and its gorges, Lake Kariba, the Lower Zambezi, Nyika, Sioma Ngwezi and Mosi Oa Tunya National Parks) shall be considered for bilateral management and zoning plans to ensure sustainable tourism development.

2.7 Public Awareness

In order to create greater public awareness and appreciation of the role of tourism in national development and the benefits and improvement that the industry can bring to everyday life, the Ministry of Tourism in conjunction with the Ministry of Information and Broadcasting Services and other stakeholders, will launch a sustained campaign of information dissemination.

The information dissemination campaign will primarily focus on sectors and areas where tourism activities take place. This campaign will also target schools and places of higher learning as well as work places, to instill a culture of recreation where leisure time is expended in tourist activities at local attractions, at traditional cultural and historical events, on a regular basis. The intention is also to improve the national image at home and abroad to create a greater appreciation amongst all Zambians of the natural and cultural wealth and beauty of their country.

2.8 Empowerment of Local Communities and Entrepreneurs

The Government recognises the need for local communities and local entrepreneurs to become more involved with tourism activities as owners and partners. Foreign investment and expertise is essential in such a competitive global industry. But every opportunity to increase local involvement in suitable opportunities shall also be encouraged. Suitable opportunities are those where local involvement would be more competitive than foreign involvement. For example, some market segments are keen to experience African facilities as opposed to international facilities and here Zambian entrepreneurship would meet the test of being more competitive.

2.8.1 Gender Issues

The Government is committed to ensuring that there are equal opportunities to both men and women in the tourism industry. In cooperation with the "Gender In Development Division", (GIDD) the Ministry of Tourism will ensure that gender policy objectives are taken account of in the tourism sector.

CHAPTER 3: INSTITUTIONAL AND LEGAL FRAMEWORK

3.0 INSTITUTIONAL FRAMEWORK FOR POLICY IMPLEMENTATION

Chapter three addresses the Institutional and Legal Framework along with the question of funding.

The Government has been fully aware that the future development of the tourism industry, as a vital source of jobs and incomes for Zambian people, is dependent upon an effective institutional and policy framework within the country. To this end the Government has instituted changes in the way the tourism sector will be managed, which takes into account the key role to be played by the private sector and local communities.

The new Tourism Policy in conjunction with the Public Service Reform Programme aims to restructure tourism public institutions in order to ensure enhanced, professionalism and efficiency in the delivery of service to the public.

The Government sees the institutional framework in the context of:-

- ◆ The Role of Government
- ◆ The Role of the Private Sector
- ◆ The Role of Local Communities

3.1 The Role of Government

In its overall commitment to developing a more decentralised tourism economy, Government shall:-

- ◆ facilitate tourism development
- ◆ formulate tourism related policies;
- ◆ enact legislation to consolidate the legislative developments
- ◆ streamline and eliminate conflicts/overlaps –
- ◆ introduce appropriate administrative structures necessary for the implementation of these policies;

3.1.1 The Ministry of Tourism

The Ministry of Tourism carries responsibility for policy formulation and coordination in the sector and for carrying out the above roles. To strengthen its capability, the Government shall re-organise the Ministry into two departments:-

- ◆ a 'Human Resource Management and Administration Department'

- ♦ a 'Tourism Planning Management and Coordination Directorate (TPMCD)' mandated to implement tourism related policies, as well as facilitate, monitor and analyse the development and performance of the industry.
- ♦ The TPMCD shall play a pivotal role in the planning, management and coordination of compatible tourism policies and strategies.

Through this re-organisation it is intended that Government shall provide leadership for the sector, as well as improved administrative procedures, so that the private sector can thrive in what the Government re-cognises is a highly competitive business environment. The Ministry of Tourism wants to focus on the concept of Total Quality Management in its administration to the benefit of the private sector.

3.1.2 National Parks and Wildlife Services (NPWS)

Tourism based upon wildlife has become the leading foreign exchange earner in several countries. Similarly the Zambian leisure tourist product, relative to both international and domestic tourism, is based substantially on wildlife and wilderness, and to a lesser extent upon culture and heritage.

NPWS, which manages the wildlife estate, is essentially a conservation organisation, but, in view of its present concern for sustainability, has increasingly given priority to the commercial development of its assets. Income is generated from the sale of hunting concessions and safari licenses in Game Management Areas (GMAs) and through the sustainable use of the National Parks (e.g. through park entry fees and lodge leases). However it is still an under-funded organization that cannot cover its responsibilities.

However, Government's recognition of and commitment to the management of bio-diversity and wildlife is clearly set out in the 1998 Policy for National Parks and Wildlife Service (NPWS) in Zambia and its Mission Statement for ZAWA (the organisation taking over from NPWS):

"The Zambia Wildlife Authority (ZAWA) is there to conserve Zambia's precious and unique wildlife. To that purpose it promotes the appreciation and sustainable use of wildlife resources by:

- ♦ *facilitating the active participation of local communities in the management of the wildlife estate*
- ♦ *promotion and development of tourism*
- ♦ *enhancing the recognition of the economic value of wildlife resources amongst public and private stakeholders; and*
- ♦ *education of the general public*

By doing so ZAWA contributes to the maintenance of Zambia's rich Bio-diversity and to economic development of the sector, the local communities in the Game Management Areas (GMAs) and the country as a whole".

3.1.3 Hotel & Tourism Training Institute

This institution has been turned into a Trust. The Ministry will continue to be represented on its governing board of trustees, to monitor tourism and hospitality training policy. It shall continue to enjoy direct grant-aided financial support from Government until the proposed industry levy in support of training is legislated.

3.1.4 Zambia National Tourist Board

The marketing and promotion of the country's tourist attractions shall continue to be the responsibility of ZNTB. The Board shall be transformed into a purely marketing entity. Its regulatory and licensing functions shall be transferred to the Tourism Management Directorate at the Ministry of Tourism. The new organisation shall retain its autonomous status and with improved funding be able to better carry out its marketing, sales promotion, public relations and image building and publicity functions.

3.1.5 National Museums Board

National Museums will continue to run under the National Museums Board and shall continue to receive Government funding by grants. The museums will, however, be encouraged to engage in revenue generating activities to supplement Government funding and to collaborate with the private sector, in joint ventures, to accomplish their mission. Establishment of private museums will be encouraged at all times.

3.1.6 National Heritage and Conservation Commission

The management of the country's heritage resources will continue to be carried out under the National Heritage Conservation Commission with basic funding by Government from grants. NHCC will be encouraged to engage in revenue generating activities. Many heritage sites throughout the country have great potential for commercial exploitation and provide ideal opportunities for local entrepreneurs to partner with local communities in their development.

3.2 The Role of the Private Sector

The principal goal of the private sector, in close consultation with Government, will be to provide the main inputs for the growth of tourism. The guiding principle in private business performance, will be the provision of 'value for money'. The private sector bears the risks of investment and the responsibility to satisfy tourists.

The functions of the private sector will be to:-

- ♦ invest in the tourism and hospitality industry;
- ♦ speak with one voice and accurately articulate its responsible views through the Tourism Council of Zambia (TCZ).
- ♦ ensure the safety, security and health of all visitors and workers in conjunction with Government.
- ♦ operate business according to appropriate standards and codes of ethics agreed with Government.
- ♦ involve local communities in the tourism industry by establishing partnership ventures with the rural communities.

3.3 The Role of Local Communities

Local communities, as traditional custodians of Zambia's natural and cultural heritage of land, have a vital role and responsibility in sustainable tourism development. Accordingly the role of the local communities will be to:-

- ♦ organise themselves to effectively participate in the tourism industry and to interact with Government and the private sector in this regard;
- ♦ promote sustainable tourism development which enhances the local environment and culture of the area;
- ♦ enter into joint agreements with lodges and hotels for the supply of locally produced agricultural and other products, including the provision of labour.
- ♦ enter into partnerships with investors in tourism facilities, so that local communities play a full part in the industry

3.4 Legislation

To facilitate development of the tourism sector, the Ministry of Tourism through the Tourism Planning Management and Coordination Directorate will monitor the performance and adequacy of existing structural organisations and of existing legislation, and as necessary consolidate changes thereto. Accordingly there will be enacted appropriate legislation to consolidate the legal developments and the introduction of appropriate administrative structures necessary for the implementation of the Policy.

3.5 Funding of the Tourism Sector

3.5.1 Tourism Development Credit Facility

Government will establish a Tourism Development Credit Facility to facilitate private sector funding. This facility will be a source of soft loans for local investors and local communities. Loan applications will be subject to the usual test of credit worthiness and viability, and may also include an assessment of the scale and location of the proposed venture.

3.5.2 Tourism Development Fund

A Tourism Development Fund shall be established for the purpose of tourism marketing and development to supplement Government funding. A Tourism Development Fund Committee, under the Ministry of Tourism will administer the fund.

A tourism levy shall be established to replace the existing 10% service charge to be decided in the strategy.

3.6 Plan of Action

As indicated in the introduction, this policy document sets out the general aims of the Government of Zambia. As a supplement to this policy document, it is intended that the Ministry of Tourism will prepare a 'Zambia - Tourism Objectives and Strategies' Document which will apply to the immediate period (2000 to 2005). This latter document will set out measurable objectives for tourism along with the strategies for reaching these objectives. It will represent an Action Plan for the implementation of the Policy.

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