

**AFRICAN DEVELOPMENT BANK**

**DEPARTMENT OF STATE FOR TOURISM AND CULTURE,  
REPUBLIC OF THE GAMBIA**

# **The Gambia Tourism Development Master Plan**

**SUMMARY REPORT  
JULY 2006**

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## **ABBREVIATIONS AND ACRONYMS**

ASSET	Association of Small Scale Enterprises in Tourism
CSO	Central Statistical Office
DOSTC	Department of State for Tourism and Culture
DPWM	Department of Parks and Wildlife Management
EU	European Union
GCAA	Gambia Civil Aviation Authority
GDP	Gross Domestic Product
GIPFZA	The Gambia Investment Promotion and Free Zones Agency
GTA	Gambia Tourism Authority
LGA	Local Government Administration
MICE	Meetings, Incentives, Conferences and Exhibitions
NCAC	National Council for Arts and Culture
NEA	National Environment Agency
NGO	Non-Governmental Organisation
NAWEC	National Water and Electricity Company
NTTI	National Tourism Training Institute
TA	Technical Assistance
TDA	Tourism Development Area
UK	United Kingdom
UNDP	United Nations Development Programme
UNWTO	United Nations World Tourism Organisation

# **1. THE MASTER PLAN SUMMARY**

## **1.1 The Summary**

Tourism is a fundamental element of the economy of The Gambia. As an industry it has the potential to deliver higher levels of income and substantially increased wage earning employment, as well as higher levels of Government revenue. This Tourism Development Master Plan seeks to provide a mechanism for achieving this potential.

In this summary the focus is on:

- The importance of tourism to The Gambia
- The Vision for the future of tourism
- The position of The Gambia in international tourism as of 2006
- What has to be achieved to meet the Vision: the short and medium term strategy and ten year action plan
- The longer term programme
- Implementation and monitoring of the Plan

Supporting information is contained in the Main Plan Report and in the Technical Reports.

## **1.2 The Tourism Planning Process**

The Tourism Development Master Plan is designed to chart a way forward for tourism in The Gambia in the short, medium and longer-term. Work on the Plan commenced in 2004, with a draft master plan being completed in 2005. Extensive consultations were undertaken during the preparation process including on the draft plan, and the final Plan reflects comments made by stakeholders.

The Plan is made up of this Summary, a Main Plan Report and 16 Technical Reports.

The subject areas covered in the Technical Reports are:

1: The Economic Impact of Tourism	9: Agricultural Linkages
2: Air Access	10: Human Resource Development
3: Visitor Survey (at the airport)	11: Tourism Related Social Factors
4: Visitor Survey (at hotels)	12: Cultural Tourism
5: Marketing and Promotion	13: Environmental Issues
6: Product Development	14: Parks Management
7: Physical Tourism Planning	15: Tourism Related Infrastructure
8: River Cruise Product	16: Tourism Legislation

## **2. THE IMPORTANCE OF TOURISM TO THE GAMBIA**

Tourism is of vital importance to The Gambia, second to agriculture in its place in the economy. It is a major source of foreign exchange, comprises a significant proportion of GDP and is an important source of wage earning employment, providing some 16,000 jobs.

Given the small size of the domestic market and limited opportunities for other forms of economic activity such as manufacturing, tourism is one of the few economic sectors that offers significant growth potential. This is particularly important given the relatively low level of incomes per capita in The Gambia. Tourism is one of the few sectors able to provide paid employment as well as generating foreign exchange.

The target under the Plan is for net foreign exchange earnings to rise from an estimated US\$40 million in 2004 to US\$130 million by 2020. The target is for tourism-generated employment to increase to around 35,000 jobs by 2020.

For the position of tourism in the economy to be maintained, and for it to grow, decisive, concerted action is required by both Government and the private sector. Without this, The Gambia will lose out to other competing destinations and will fail to fulfill its potential – with associated economic loss. Hence there is the need to act with urgency, vigour and with determination.

### **3. THE VISION FOR THE DEVELOPMENT OF TOURISM**

#### **3.1 The Vision**

The objective of The Gambia's Vision 2020 for the tourism sector is defined as

*"to make The Gambia a tourist paradise and a major tourist destination through product innovation, quality improvement, improvement of investment returns and diversification of The Gambia's tourism product".*

The Vision for The Gambia as a tourism destination can thus be described as:

*A distinctive tourism destination that offers a high quality of experience for our visitors that is sustainable and where strong economic and social benefits are provided for Gambians.*

Implications of this Vision are for:

- Progressive improvements in the quality and range of the product offered, both in terms of accommodation and of ancillary accommodation. This includes a wider geographical spread of tourism within The Gambia;
- Strong marketing and promotion that enables The Gambia to penetrate new markets, both geographically and in terms of market segments;
- Higher standards of customer care, supported by quality training.

Key results will include raised income levels from tourism, including via higher average daily expenditure on the part of visitors to The Gambia. Employment available in the industry will be more varied, spread more widely geographically, and provide higher levels of job satisfaction. Higher tax revenues will provide Government with enhanced resources to address its poverty reduction agenda.

#### **3.2 How the Vision is to be reached**

The gap between tourism in The Gambia as it exists in 2006 and where the country wishes to be at the end of the Tourism Development Master Plan period is substantial.

The purpose of this Plan is map out the changes that are necessary for the Vision to be achieved.

The Vision can only be implemented by Government playing a key lead role, working in tandem with the private sector. This will require

political commitment from State House downwards and, given that tourism is a cross-cutting activity, from a wide range of interests.

Government illustrated its commitment to the sector by the establishment of The Gambia Tourism Authority (GTA). The Authority has to be developed further if the Vision is to succeed, with a strong effort to build institutional capacity in the Authority and in other institutions related to tourism. This includes the Hotel School, which should be developed both via capacity building and via new enhanced facilities and courses into a National Tourism Training Institute (NTTI).

There have been substantial steps in the recognition of the role of small and medium sized enterprises in tourism, including via the establishment of the Association of Small Enterprises in Tourism (ASSET). ASSET, the Hotel Association, the Tourism and Travel Association, other interested parties and donors must work together with the GTA and Government on a partnership basis if the Vision is to be achieved.

## **4. TOURISM IN 2006**

### **4.1 History of tourism in The Gambia**

The Gambia is a tourism destination with an unusual history. Many destinations developed on the basis of transit travel (such as Fiji) or via young independent travelers (such as Goa). The Gambia was developed from 1965 onwards as a winter sunshine destination for European package tours based on charter flights. It was the only such destination in Africa south of the Sahara; only a few others have followed, notably the Kenya coast and, for the French market, Senegal.

As a destination The Gambia remains something of an anomaly. In a number of respects it is a conventional Mediterranean package tour destination that is located in Africa. There is very little business related tourism, with very little income from meetings, conferences, incentives and exhibitions (MICE).

This has led to specific characteristics:

- A high level of dependence on charter flights on aircraft owned by major European tour operators;
- A strong concentration on the winter season;
- A focus on accommodation close to the sea near to Banjul airport;
- A short average length of stay with relatively limited travel within The Gambia;
- Relaxation as a prime holiday motive.

### **4.2 Gambia's tourism in 2006**

Holidays in The Gambia are sold largely on the basis of relatively low prices. This positions the country in competition with other relatively cheap winter sunshine destinations for Europeans such as the Canary Islands, the Red Sea coast of Egypt and Goa.

Through no fault of The Gambia, the German market has largely been lost, and the original market of Scandinavia has declined in importance. The key geographic markets for The Gambia as of 2006 are the United Kingdom and the Netherlands.

As compared to the competition, The Gambia has stalled in its progress as a tourist destination. Whereas tourism had grown in surges in the 1970s, 1980s and 1990s, air charter arrivals have tended to remain at around 100,000 (or less) per annum for a decade. The Gambia has been losing market share in its key originating markets.

As far as major European tour operators are concerned, The Gambia is a relatively marginal destination. Tourist numbers are small as compared to other destinations and profitability is focused on the winter



season. There is greater appeal for European tour operators (and their airlines) in flying to destinations that offer greater profit potential. Higher aircraft utilisations are achieved during the European summer flying to Mediterranean destinations with shorter flying times than/to from The Gambia.

A loss of share on the part of The Gambia in the key UK market has been accompanied by a general relative decline in package holidays in key markets, including the UK. This is because of a growth in independent travel. This trend has been facilitated by:

- the expansion of low cost airlines in Europe;
- the potential for direct booking via the internet;
- the growth of foreign home ownership (especially by residents of the UK);
- an increased familiarity with foreign travel.

Tour operators such First Choice in the UK have responded to these trends by cutting back on their mainstream sun and sea tourism product (as offered by The Gambia) where margins are only 2-3% and switching the emphasis to longer-haul travel and niche tourism products such as adventure travel and sailing where margins of 5-6% can be achieved.

With the focus on relatively cheap holidays, the rates paid by European tour operators for hotel accommodation in The Gambia are typically very low. This has constrained profitability and discouraged investment in product renewal as well as in new accommodation and product diversification. A result is that there are only a limited number of hotels that are of sufficient standard to be saleable by foreign tour operators.

The Gambia has failed to keep up with changing trends and tastes in travel. There is little quality self-catering accommodation and only limited luxury accommodation as can be found in the Caribbean or the Indian Ocean. There are few services for independent travelers (including only limited vehicle rental), and there has been very limited access by scheduled flights – with no access by low cost airlines. There is no all-inclusive product as offered by virtually all the destinations with which The Gambia competes.

With some exceptions such as the Coconut Inn and Makasutu, the Gambian tourism product has not adjusted to changes in lifestyles, tastes or changes in competing destinations. Where new accommodation has come on stream, there have tended to be other than purely financial forces at work. Exacerbating the challenges for The Gambia are health issues, including negative publicity given to the incidence of malaria.

Particular challenges for The Gambia are that:

- (1) air access is relatively tenuous. There is a need for more passengers to strengthen the air flight access between The Gambia and different markets in Europe and to provide more passenger

and aircraft throughput to pay for the running of an international airport in Banjul;

- (2) occupancy factors in hotels are too low by modern competitive standards. Generally tourist destinations nowadays cannot survive on a short seasonal operation;
- (3) tourist accommodation in The Gambia, in general, is earning too little money to properly refurbish and keep up standards that tourists now expect – both in quality and range of facilities and with reference to both physical standards and service standards. Foreign tour operators have expressed the view that there is no ‘culture of service’ in The Gambia and that the fundamentals of service are lacking. This has been compared to Egypt, where a service initiative over recent years has reaped great benefits.

Despite these challenges, The Gambia is perceived as a relatively safe and secure destination, one that is politically stable and with low levels of serious crime. Customer satisfaction among those who do come is relatively high, with 95% of those surveyed at Banjul airport saying that they would recommend The Gambia to a friend as a holiday destination. The one universal area of dissatisfaction relates to the “bumsters”, displeasing 70% of visitors, an extremely high figure for a feature of this kind. For the Vision to be realised, the bumster issue has to be resolved.

#### **4.3 New opportunities**

As of 2006, new products are available to provide a platform for the re-invigoration of The Gambia’s tourism. Key among these are:

- The completion of a new quality hotel under the Sheraton brand and other new accommodation is coming on stream;
- The provision of new conference facilities;
- The re-introduction of scheduled services from the UK by a UK registered airline;
- Scheduled airline service direct from the USA.

These new developments provide the opportunity to give tourism in The Gambia new momentum, directed towards the achievement of the Vision for the sector.

#### **4.4 Development options**

As part of the process of finalising this Plan, consideration was given to three different options. These can be described as:

- Option 1 – ‘Hold Level’: keeping things much as they are, with some modest product and marketing improvements.
- Option 2 – ‘Modest Increase’: greater emphasis on product improvement and diversification.

- Option 3 – ‘Double Income’: A considerable broadening of the product portfolio to match the Vision for tourism linked with enhanced marketing activity and marketing spend.

The consensus view during consultations within the public sector and with the private sector was that The Gambia must seek the third option (‘Double Income’). The first two options risk a downward spiral because The Gambia would fail to be competitive internationally as a destination, and would fail to meet changing tastes in its key originating markets.

In the following sections the mechanisms for achieving this substantial level of change are described. The immediate short term strategy is followed by the longer term strategy for action. The short term strategy covers 5 years, depending on the rate of progress, followed by a medium term strategy of a further 5 years with the long term strategy following after that.

## 5. THE STRATEGY FOR THE SHORT AND MEDIUM TERM

### 5.1 Three pronged strategy

The key to the development of tourism in the short and medium term, defined as a ten year period, is the adoption of a three pronged strategy:

- 1) Broadening of the market: this encompasses growth in new geographical markets (including those such as Germany where business has been lost) and in increased business from niche markets such as adventure travel and cultural tourism that have beneficial impacts both on the distribution of visitors within The Gambia and on reducing seasonality.
- 2) Enhancing product quality and scope, via improvement to the current stock of accommodation and progressively broaden the range of attractions and activities that are available. Product development includes increased emphasis on the nation's cultural heritage and a larger community involvement in tourism.
- 3) Addressing key infrastructure needs, via enhancements to key elements of infrastructure, notably electricity provision, and also improving health services available to visitors including the possible provision of a privately operated health clinic.

The broadening of the market will involve a growth in independent travel as compared to package tours. This will require improvements in information both prior to the visitor arriving in The Gambia and also on arrival at Banjul Airport. Successfully implemented, this should lead to increased visitor spending outside established tourist areas.

However, in the short-term air access is dependent on the continuation of a pattern of tourism that revolves around charter flights and on negotiated rates with foreign tour operators. The diversification of the tourism sector in The Gambia requires this form of tourism to be maintained and developed in order that facilities are better utilised and that income from the sector can grow overall. This in turn requires The Gambia to be competitive as a tourism destination.

#### **AIR ACCESS STRATEGY**

**Air access is fundamental to tourism in The Gambia. The strategy is to expand the level of service, with increased scheduled 'charter' flights along the model adopted in 2006 to/from London, and to increase charter flight access from new originating points. It is also to maintain a direct connection with North America and to develop tourism on the basis of West African routes. The strategy is to be pursued via a support package of measures to new and additional services that meet the objectives of the Tourism Development Master Plan.**

The aim should be for average spending per visitor to be gradually raised in real terms via progressive improvement in product quality.

## 5.2 Specific action plan

The implementation programme for the short and medium term strategy is presented in a ten year action plan that focuses on priority projects. This action plan needs to be carried forward by a joined up effort within Government working in partnership with the private sector. It reflects a role for Government as facilitator, providing a sound basis for investment by the private sector, while the private sector implements many of the activities.

For the action plan to succeed, donors and soft loan financing institutions have an important role to play. The Tourism Development Master Plan has itself been funded by the African Development Bank, and there is a further need for donor assistance in implementation.

The market strategy has to be focused on the pre-eminent markets. The instruments for opening up the markets are a combination of:

- (1) support schemes for airlines and for tour operators combined with
- (2) destination marketing by GTA, in partnership with the private sector.

The objective should be for these to be financed by a direct levy on incoming tourists.

Key aims are:

- to broaden the market spectrum, including recapturing Germany as a geographical market for The Gambia; also
- to broaden the spectrum of market segments, to develop specialist interest groups such as those interested in cultural heritage.

### **HIGHER YIELD MARKET MIX**

**A key element of the Vision is to attract visitors with a higher average spend per day – those who can be regarded as more ‘up-market’. This involves increased volumes of independent travel and those with specialist interests in ‘niche’ tourism products including cultural tourism. The opening of the Sheraton Hotel, and new scheduled services from the UK and the USA, gives the opportunity for a new impetus in this direction. This has to be pursued in both existing geographical markets and in new ones in Europe and North America. Priority geographical markets in this context are Spain, the UK and the North Eastern seaboard of the USA.**

Priority market niches for exploitation are:

- eco-tourism, cultural tourism (including the Roots market), the further development of bird watching, and twin centre vacations with Senegal, especially in the German market;

- sport and wildlife activities on land and sea, such as golf and diving, “soft adventure” and ‘wellness’, lifestyle related packages, especially in the UK market.

The MICE market offers the potential to reduce seasonality. It is constrained by air access, but efforts should be made in association with relevant airlines to develop meetings and conference business from neighbouring West African countries.

#### **HIGHER YIELDING MARKET NICHES**

**The development of specialised market niches is facilitated by the growth of scheduled services. Primary targets for development in this context should be adventure tourism (potentially linked into Senegal) and cultural tourism for those with a specific interest in the cultural richness and diversity to be found in The Gambia. As new facilities are provided, the “wellness”, sport fishing and golfing markets can be targeted, particularly in the UK.**

The responsible authorities (DOSTC – Department of State for Tourism and Culture, GTA – The Gambia Tourism Authority, GCAA – The Gambia Civil Aviation Authority) have to encourage the airlines and tour operators to come to The Gambia and must enable them to operate profitably.

Short-term product development has to be geared to the immediate demands of the market strategy. Recapturing Germany as a market will involve hotel improvements/refurbishments; serious consideration also needs to be given to the re-introduction of all-inclusive resorts. Broadening the market segments will involve improving the resort facilities outside the hotels, improving the niche services such as bird watching, improving the tourist attractions, and encouraging new experiences to add to the product portfolio. None of this is easy under the current financial constraints.

Analyses of the investment potential in tourism, as detailed in Technical Report number 6, indicates that large new hotels, at 150 rooms and more, are difficult to finance. So the main instrument for encouraging such investment is for the GTA to identify sites which will allow multiple use (a combination of hotels, villas, residential and commercial) so increasing the rates of return on the overall investment. At the same time the GTA will embark upon a major programme of recovering sites where development has not been honoured according to the leases. In this way GTA can bring the supply of sites back under control, again improving the investment returns to large-scale investors. The general thrust of this strategy is to replace ‘speculators’, of which there are many, with genuine and capable investors who can bring both capital and expertise to The Gambia.

### **ACCOMMODATION: A PERIOD OF CONSOLIDATION**

The provision of appropriate forms of accommodation is fundamental to the implementation of the Plan. As of 2006, accommodation quality is decidedly mixed, a reflection of the low revenues per room dictated by low average achieved room rates and a high degree of seasonality, limiting the amount of funding available for refurbishment. In 2006/7 it is anticipated that 500 new rooms will come on stream to add to the 3,000 already available (although only some 1,300 of these are suitable for use by foreign tour operators). For the Vision to be realised minimum quality standards need to be enforced, and coherent and transparent planning controls introduced (as described in Technical Report No 7). For this reason, a period of consolidation of three to five years will be adopted. During this period, the Department of State for Tourism and Culture will encourage tourism operators to renovate\ upgrade\rehabilitate their facilities and to bring them up to international standard. The consolidation period will allow Cabinet to digest and give approval and directives in respect of the technical report on the tourism development area to ensure proper planned development is in force as recommended in this Plan .To support the consolidation programme, a temporary ban on the allocation of land should be enforced, and consideration given to only unique projects. Consideration should also be given to an extension of the incentive regime to better cover refurbishment (as identified in Technical Report No 6).

Improvements to infrastructure are, in general, a part of a wider national agenda, with the provision of a reliable electricity supply being the most significant. A specific requirement for higher value tourism is the provision of suitable health services. A mechanism for delivery in this area is to facilitate and support the opening of a well designed and operated private health clinic that is able to operate on a commercial basis.

### **5.3 Components of the action plan**

The action plan is divided into first rank projects, the most critical for implementation, and second rank projects that are highly desirable to be commenced in the ten year time frame.

First rank projects cover:

- **Institutional strengthening and capacity building**, to build on existing institutions in order to give them the capability and expertise for programme implementation;
- **Destination marketing** to meet the short to medium term strategy of market development and diversification. This includes re-invigorating existing geographical markets, developing specific market niches and exploring new markets, incorporating the Roots market in north eastern USA and the regional West African market;
- **Product development**, including the enhancement of the cultural tourism product and linkages with local arts and crafts.

Activities include creating a more attractive environment in the existing TDA, training local tour guides with pilot programmes, potentially at James Island and/or Jufereh and researching product improvements required to attract higher spending customers from the EU and beyond;

- **Quality in tourism establishments**, including the establishment of minimum standards for 'tourist hotels', the review of investment incentives and of Government policy on all-inclusive resorts, and the institution of annual Gambia tourism awards that encourage product enhancement and enable quality of provision and operation to be recognised in a way that will also assist their own marketing;
- **Social issues**, including addressing the issue of bumsters, seeking to establish revenue earning opportunities for them in a way that brings about a change in their behaviour. The UK Travel Foundation is assisting beach boys to find alternative means of employment, with an initial 'needs assessment' followed by a training and skills development plan. This initiative will need to be followed through. Bumster free areas must also be achieved, including at the airport (although this will require a change to the design and layout of the terminal building);
- **Human Resource Development**, aimed at improving both job opportunities for Gambians and improved levels of customer care in line with the Vision for tourism. The Gambian people represent a real opportunity for The Gambia to differentiate itself from other tourist destinations, and so offer something special for tourists that supports the implementation of the Vision for tourism. Training programmes in their widest sense will be the key drivers in this process.

Upgrading The Gambia Hotel School into a National Tourism Training Institute is the key instrument for achieving this. It is a major project to be undertaken in the Ten Year Plan (excluding the major investments to be undertaken by the private sector).

- **Responsible Tourism** with the furtherance of the Responsible Tourism Policy for The Gambia and the linkage of the mainstream travel industry with community development and poverty alleviation;
- **Linkages**: Spreading the benefits of tourism is critical to The Gambia, and the main instrument in terms of linkages is seen to be institutional support to the various agricultural producer associations. The 'Gambia is Good' project needs to be maintained; this project is an outstanding one against international comparison and the concept should be further developed. Efforts on agricultural linkages are being supported by the Travel Foundation.



### **TOURISM AND AGRICULTURE**

Initiatives such as 'Gambia is Good', which received start-up support from the UK Department for International Development, and tours by visitors to see vegetables being grown and harvested, as supported by the UK Travel Foundation, provide a basis for the linkage of agriculture with tourism, and for new agricultural related attractions to develop. In future these should aim to extend to areas such as flower cultivation, with visitors being able to take fresh Gambian produced flowers home at the end of their holidays. These kind of initiatives are also likely to need donor assistance during the start-up phase, but they need to be both commercially sustainable in the longer term and supported by the Gambian tourism industry as a whole.

- Specific **infrastructure developments** aimed at improving environmental conditions in key areas for tourism. The main tourism programmes identified are:
  - i. Rehabilitation of the Kotu Wastewater Treatment Plant;
  - ii. Measures at the Kotu Power Plan to prevent oil spills;
  - iii. Clean-up and closure of Bakota solid waste dump. This is already designed and will be assisted through World Bank funding.

The reliable supply of electricity is very important to the long term sustainable future for tourism as it is important for other sectors of the economy.

- **Environmental Management:** Some of the environmental issues are handled under the infrastructure improvements but an additional programme of environmental improvements under the auspices of the NEA is included in the overall Action Plan.

Second rank projects relate to product development, the implementation of a tourism awareness programme, institutional support to producer associations and further infrastructure and environmental improvements.

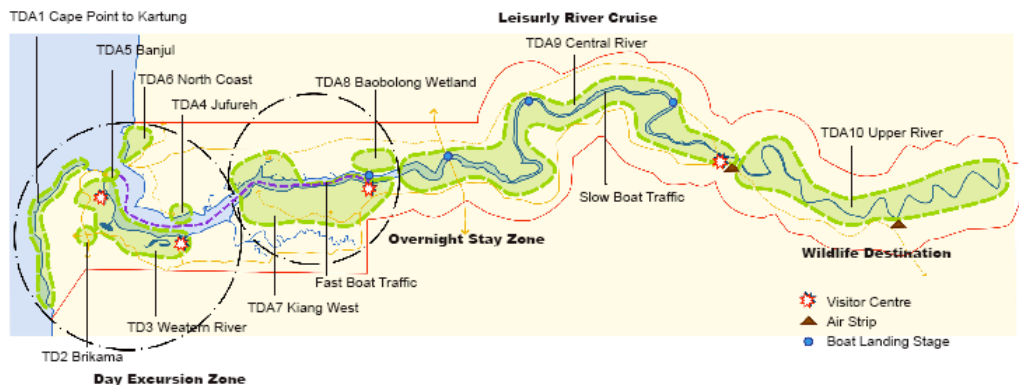
## 6. THE LONGER TERM PROGRAMME

### 6.1 Extending the product offering

The longer term strategy sees tourism in The Gambia developing progressively through a Tourism Development Framework of ten Tourism Development Areas (TDA's) throughout the country, each presenting its own differentiated and themed product.

### The Tourism Development Framework

#### Tourism Development Framework



The Tourism Development Framework focuses on:

- Building on the strengths of the existing TDA (Banjul to Allahein) to with emphasis on 'branding' according to development, type of experience etc. The intention is that the TDA (including the tourism area from Fajara to Cape Point) will have a series of differentiated products and will be much more in keeping with sustainable development and with the future demands of the markets;
- Developing the nature, heritage and community based tourism product along the River Gambia (Oyster Creek to Brefet) in a more intensive and commercial manner, offering an 'experience', but not compromising the integrity of the resource;

- Opening up and promoting Kiang West National Park and surrounding areas when management is in place and developing the nature and river products as the 'adventure theme' of The Gambia;
- Emphasising the River Gambia in the product portfolio, initially as a river cruise from Tendaba to George Town with stops along the way. In the longer term, the Upper River section may be developed for high end 'get away from it all' tourism.

In addition to the existing TDA, a further nine TDAs have been identified, making ten in all:

1. West Coast (existing, with extension to the north)
2. Brikama
3. Western River
4. Jufureh
5. Banjul
6. North Coast
7. Kiang West
8. Baobolong Wetland
9. Central River
10. Upper River

These aim to fit within the overall Vision. Factors taken into consideration in their delineation includes the location of parks and protected areas and the location and linkages with local communities.

Within these TDAs, a number of Tourism Sites are being identified. Designated Tourism Sites comprise significant natural and cultural heritage sites, areas of attractive landscape and other attractions.

## **6.2 Anchoring and Linking TDAs and Tourism Sites**

### Clustering

In order to attract more tourists to the TDAs, induce them to stay longer and be convenient for tour operators, various sites and attractions should be combined or linked in one area. It is very important to develop a product that effectively integrates sites, attractions, events, activities, and associated accommodation. This clustering of sites is particularly applicable to the Western River.

### Theming

Clusters may be made more attractive by developing and building on themes likely to interest potential visitors. Themes enable product differentiation. Using the example of the Central River, one cluster might be part of a themed tour, focusing on the river environment, coastal life and community interactions with, and use of, natural and cultural heritage resources.

### Themed Visitor Centres

Themed visitor centres are identified for each TDA. The purpose of the visitor centre would be to provide structured environmental education and a concentration of facilities, services and information for tourists. These centres will create new local job opportunities.

### Themed Routes and Trails

Speciality routes enable visitors to focus on themes. This allows them to choose a particular experience (nature interpretation, heritage, the river, eco/agro production etc.). Within this framework, a trail system can be developed to offer a mix of recreational settings from remote to urban. These could include the 'River Trail', which may be a combination of road, track and creek, and has the opportunity of linking the TSs within the Western River TDA. The 'Wilderness Trail' in Kiang West may combine the offerings of the Park and surrounding area with the tourism 'aura' or lure of the destination. A coastal trail may be developed along the West Coast TDA.

## **6.3 Integrating TDAs, Tourism Sites, Links and Themes**

The overall concept aims to establish and promote a network of designated tourism circuits (by road, river or air), scenic routes and trails, with appropriate signage and interpretive information that forms strong linkages with tourism sites and attractions, protected areas, visitor centres, community projects, events, and related experiences. There is a need to integrate all these elements, in terms of:

- delivering product experiences;
- raising awareness about exploring and discovering The Gambia; and
- marketing and promoting the product.

Action Area Plans need to be prepared for all ten TDA's, integrating park management plans, Government plans and infrastructure programmes. The level of planning will present the tourism opportunities as a whole and set out an overall strategic approach and development guidelines for all major aspects of physical tourism development.

## **6.4 Comprehensive Actions**

The extension of the product offering in the longer term will require a similar series of linked activities as during the defined ten year action plan described in Section 5. In particular it will require vigorous investment promotion, destination marketing, the further development of linkages, the provision of appropriate infrastructure and strong environmental management. Strong community involvement will be required throughout.

## **7. IMPLEMENTATION AND MONITORING**

### **7.1 Institutions for implementation**

For the Vision to come fruition, and the tourism development strategy to be effectively implemented requires determination and vigour. Political commitment is required with the involvement of the whole Cabinet led by the President. The Secretary of State for Tourism and Culture needs to play a key role.

It also demands effective institutions for delivery. This is particularly the case as a considerable number of Government departments and agencies must be involved, together with the private sector.

The lead institution has to be the Department for State for Tourism and Culture (DOSTC). The DOSTC will continue to be the main tourism policy and planning arm of Government whilst the Gambia Tourism Authority continues to be the implementation and operational agency. Given the degree of change management that is required, the Department needs strengthening in relation to tourism policy and planning – setting the agenda for the overall action plan and seeking to drive it forward.

While the GTA has been a step forward it has not yet fulfilled its full potential. Among other things, there are capacity weaknesses and legislative confusion, including in relation to the GTA's responsibilities for the Tourism Development Area and to the collection of the tourism levy leading to inadequate financing and inappropriate overseas representation.

International best practice suggests that the Board of the GTA needs to be representative of the different interests of the private sector and accountable to its stakeholders, both government and the private sector.

A successful tourism organisation is fundamental to the future of tourism in The Gambia. The choice is whether to seek to strengthen the GTA on the basis of the structure that exists as of 2006 or whether to divide it into a marketing organisation and one that deals with the TDA, licensing and human resource development.

Creative and positive marketing does not mix well with physical development and licensing enforcement in the same organisation. Each require very different skills. Third parties and staff are confused by the combination of police /legal controls with marketing promotion. Enforcement sits better in a Ministry and promotion in a private sector body.

If The Gambia was starting from a clean slate, there is much to recommend a tourism organisation that focuses on marketing in line

with international best practice, and a Tourism Development Corporation responsible for the TDAs and for other functions including licensing. This would allow the GTA - or whatever the reformed organisation is called - to focus on its prime responsibility of marketing The Gambia as an attractive tourist destination and in doing so to forge a strong partnership with the private sector, with the Tourism Development Corporation given full control over the planning and management of the TDAs.

However, the GTA exists and has had only a short history. To re-structure the whole system after such a short time is bound to be disruptive. This argues for an effort to strengthen the capacity of the GTA. This requires:

- Capacity building for GTA personnel, including training that relates to best practice in national tourism organizations;
- Reform of the financing of the GTA so that it has the financial resources with which to function effectively;
- Clarification of the legal position of the GTA, particularly in relation to Tourism Development Areas;
- Independence of operation whereby the GTA is able to pay sufficient salaries to be able to attract high level personnel with strong commercial experience who are able to act within a politically influenced environment.

As part of the strengthening of the Department of State for Tourism and Culture it needs to be able to define performance targets jointly with the GTA, and to monitor performance against these targets. The GTA should have freedom of action in achieving the agreed targets. It is particularly critical that the Board of the GTA is independent and properly represents the interests of the private sector.

The GTA should be assisted to develop a strategic plan with a route map of how it should go about achieving its objectives. To implement this it needs to have a modestly sized staff which is clear about what it is to be achieved and how this will be done. As many as possible of its activities should be outsourced on the basis of transparent tendering procedures where the outsourcing is to commercial enterprises.

To place the GTA on a sounder financial basis, the tourism levy should be collected by, or allocated to, the GTA in its entirety (less reasonable collection costs if collected on its behalf). In turn the GTA needs to demonstrate to Government and private sector stakeholders that the funds are being collected transparently and that these funds are being effectively utilised. Prompt public annual reporting is a key element of this. This committed allocation gives the GTA a direct incentive to perform, in line with international best practice.

A considerable number of countries offer 'one-stop shops' to encourage investment in the tourism sector, or to encourage foreign direct investment in tourism in general. These institutions offer support

to the investor once his project has been approved. They organise a swift approval process on behalf of the investor and also obtain all necessary permits working with the investor. The investor deals with only one agency, rather than having to deal with different Ministries and other approval agencies direct.

The Gambia Investment Promotion and Free Zones Agency (GIPFZA) administers The Gambia Investment Promotion Act, signed into law in 2001. The act sets out the administrative and legal requirements for investing in The Gambia and makes provisions for business incentives, protection against compulsory acquisition, settlement of disputes and the transfer of funds. This includes establishing a "one-stop shop" for investors. As the capacity of the GTA is strengthened, it will need to work with GIPFZA to ensure that a strong and effective one-stop capacity for appropriate tourism investment is in consistent operation. GIPFZA should identify suitable tourism-related projects and prepare project profiles for presentation to prospective investors as part of a concerted promotional plan.

Other arms of Government and Government agencies are also key to implementation with identified roles in the action plan. Active and vigorous participation by the private sector is also fundamental.

This would be assisted if the various private sector tourism associations combined to form a single umbrella tourism organisation that both presents a clear voice on the part of the private sector to Government and which works in parallel with Government and the GTA to achieve key objectives as well as to manage issues that arise from time to time. This form of co-operation already exists in other African countries such as Kenya and Namibia, and The Gambia can usefully learn from their experience.

## **7.2 Capacity Building**

To achieve effective implementation requires the enhancement of technical capability for:

- 1) Department of State for Tourism and Culture
- 2) Gambia Tourism Authority
- 3) Hospitality Training School/ Tourism Training Institute

Both the DOSTC and the GTA have appropriate statutory powers to make an important difference to the business environment for tourism in the country. What is needed is commitment to the action plan plus some technical support to carry it out.

The principal tasks for these two Government arms are:

- To provide the management information which the Gambian tourism industry needs in order to improve its operational performance;

- To bring back order into the balance between demand for, and supply of, sites for tourism development in the TDA ;
- To market the destination in the targeted market segments, in order to supplement the activities of the tour operators (creating a Gambian brand) and also to open up those market segments that are independent of the tour operators; and
- To put in place the whole series of initiatives that are required in this Tourism Development Master Plan.

#### ***Institutional Strengthening and Capacity building for DOSTC***

DOSTC will be called upon to carry out many detailed policy analyses in the period of the Ten Year Action Plan. Technical Assistance should be sought for some three years both to assist with carrying out these analyses and to help in the training of local personnel. This assistance will need to bring expertise of best practice as applying in other countries of similar size and resources to those of The Gambia.

#### ***Institutional Strengthening and Capacity building for GTA***

The management of the tourism industry is one of the main pre-conditions of a successful tourism sector in The Gambia.

The GTA is to be responsible for guiding and facilitating the tourism sector. To do this, it is essential that GTA receive financial support which could be in the form of suitably qualified technical assistance that can provide support that draws on international best practice.

The main areas for such technical assistance are in:

- strategic planning to provide a clear direction and programme of realisable activities;
- marketing planning, for initiatives dovetailed to the market strategy and to the marketing strategy, especially the operation of tour operator incentives and marketing support schemes, and any assistance that the GCAA may need in implementing the route and frequency incentive schemes for airlines.
- statistics – collection and analysis of tourism statistics working with the CSO, leading eventually to TSAs for the tourism industry;
- site recovery from non-performing leaseholders. This will require considerable political courage on the part of the Gambian Government, and not a little technical skill in recovering these sites. The GTA has substantial regulatory and land distribution powers in the TDA but its powers must be clarified and lessons learnt from the effectiveness of Tourism Development Corporations elsewhere that have clear responsibility for the allocation of land for tourism;
- capacity building in licensing and regulation with the GTA acquiring the ability to enforce minimum standards in



accommodation and restaurants and to close down those facilities that do not meet these standards.

### 7.3 Monitoring

The Tourism Development Master Plan contains a relatively complex and inter-linked programme of actions that are required if the Vision for tourism in The Gambia is to be achieved. This programme of actions will require regular and careful monitoring to cater for changing circumstances. Some of these will be external to The Gambia, including changes in market circumstances and in market structures. Others will relate to delays in implementing one component that have knock-on effects on others. Regular and careful monitoring of progress is essential for these reasons.

A key issue is that The Gambia as of 2006 has no effective statistical mechanism for monitoring tourism trends. The only tourism statistics available relate to passengers arriving on charter flights. Given that scheduled flights and tourist arrivals at land borders will both become more significant as Plan implementation proceeds, this anomaly has to be rectified as a part of the GTA's research and monitoring activities.

Highlights of the measures and targets that can be achieved over the ten years 2006-2015 are presented in the Figure below.

#### Main Measures and Targets for Ten Years

MAIN MEASURE	NEW TARGETS – HIGHLIGHTS
Growth in tourist arrivals Increase in air connections  Lengthen season into September, October, April and May Accommodation Capacity	Reach 150,000 tourist arrivals by 2015 <ul style="list-style-type: none"> <li>• Annual daily scheduled flight from London</li> <li>• At least two new originating airports from UK for charters (seasonal)</li> <li>• At least four 'scheduled charters' weekly frequency from Germany (seasonal)</li> <li>• Maintenance of direct air access from North America and from key points in West Africa</li> </ul> 50% plus uplift in current low occupancy factors in hotels in these months <ul style="list-style-type: none"> <li>• Three to five new large hotels (say 150 - 200 rooms each) operational by 2015</li> <li>• Increase in self-catering and small hotel accommodation (say, up 75%)</li> <li>• At least three new small scale community related accommodation developments</li> </ul>
Human Resources: Upgrading The Gambia Hotel School	National Tourism Training Institute running at full capacity, building upon the outstanding asset of the Gambian people, giving them the needed professional and technical skills

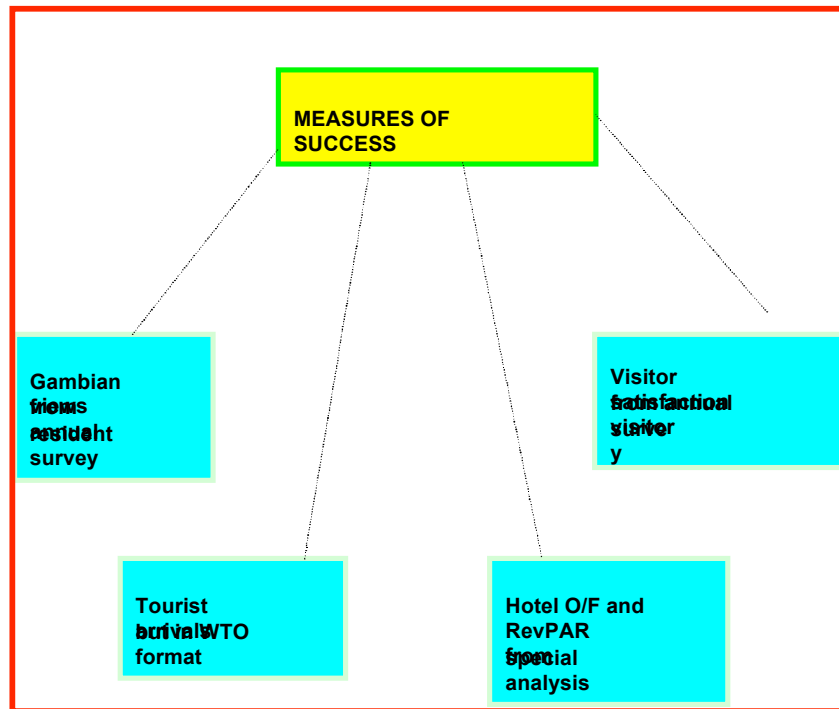
The Ten Year Action Plan presents a whole series of projects as well as a number of key strategies, of which arguably the most important are:

- Substantial strengthening of the GTA (with technical assistance and capacity training) so that it is capable of undertaking the substantial range of management tasks with which it is entrusted;
- The market strategy – greater penetration of existing markets and development of new geographic markets and market niches using the instruments of (1) airline and tour operator support combined with (2) new destination marketing by GTA;
- The product development strategy for large resorts – allowing multiple use property development, plus overtly bringing site supply in the TDA under control;
- Broadening the product portfolio with ‘all-inclusives’ resorts and with the support of small scale enterprises that are community related;
- Building on the key asset of the Gambian people with, on the one hand, measures to bring the bumster issue into a positive force rather than a negative one, plus, on the other hand, substantial training of Gambians through the metamorphosis of The Gambia Hotel School into the National Tourism Training Institute.

Key measures for monitoring the success of the Plan should include those presented in the figure on the next page.

The monitoring will involve introducing annual sample surveys (visitors and residents), as well as ongoing statistics (arrivals and industry statistics).

## Monitoring the Ten Year Action Plan



### 7.4 Commitment

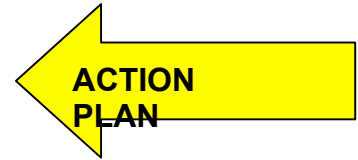
For the Vision articulated in this Plan to be brought to fruition requires political commitment, co-operation within Government and between Government and the private sector. It requires change on the part of institutions, both in terms of their technical capacity and in terms of an increased recognition of how essential it is for them to work together towards a common goal. It requires The Gambia's tourism industry as a whole to work together, including working with their existing foreign partners, and to develop new partnerships and alliances.

Working in The Gambia's favour is the relatively small size of the country and its tourism industry. While such co-ordinated action is particularly difficult to achieve in larger countries with higher populations, it should be easier to bring about in The Gambia. Smaller countries such as Singapore and Mauritius have shown how much can be achieved by having a clear vision for tourism development that is widely shared, and by a determination to bring change about to the benefit of wider civil society and the population overall.

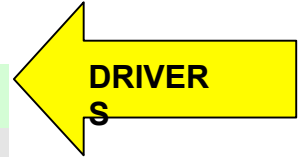
Given co-operation and co-ordination, with regular reviews of the progress being achieved with adjustments to the action plan as required, The Gambia should be able to see a new step forward in its tourism that makes it a distinctive 21<sup>st</sup> century African destination, rather than one that is a copy of a Mediterranean tourism destination of the last century.

**TO SUM IT UP**

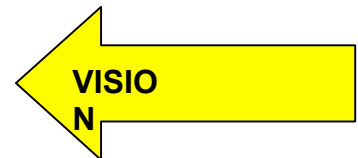
The Department of State for Tourism and Culture and Gambia Tourism Authority will be inspirational leaders in innovative and sustainable tourism



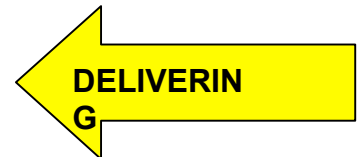
MARKE STRATEG	PRODUCT MARKETIN	OTHER STRATEGIE
<b>Broaden the Geographic</b> Recover Further UK Further Benelux Scandinavia Open up <b>Broaden the segments</b> Birdwatching Fishing, Soft Wellness Ecotouris Culture MICE	<b>Broaden the portfolio</b> All – New large hotels multiple use sites TDA Recover performing leases/ in Encourage hotels, self-lodges, and <b>Air</b> Introduce Schemes for and tour Destination by GTA of destination	<b>Put the people at the centre the</b> Turn ‘bumsterism’ a positive Empower with training in with the Improve infrastructure Undertak environmenta improvemen programme Set up the with



**A distinctive and sustainable tourism destination offering a high quality of visitor experience with strong economic and social benefits for Gambians**



Jobs for  
 Income for  
 Foreign Exchange  
 Government Revenue  
 GDP and  
 Government Revenue  
 for the Gambian  
 economy



## Appendix

### TEN YEAR PLAN – PRIORITY PROJECTS

#### First Rank

The following projects are key to the implementation of the Plan and have greatest priority. They require technical assistance that can potentially be supported initially by the African Development Bank while packages of support are negotiated with other donors such as the EU and UNDP/UNWTO. Overall responsibility for implementation will lie with the Department of State for Tourism and Culture. It would benefit if the private sector were to form an umbrella tourism association or federation along the lines found elsewhere in Africa to work with the Department of State.

	Project / Action	Year										Lead	Partners	Budget in US\$	
		1	2	3	4	5	6	7	8	9	10				
<b>1.</b>	<b>Institutional Strengthening and Capacity Building</b>														
	<b>Department of State for Tourism and Culture</b>														
1.1	Establishment of a Tourism Policy and Planning Unit within the Department of State with Technical Co-operation Support		●										Dept of State for Tourism & Culture	Source of TA support to be identified	75,000
	<b>The Gambia Tourism Authority</b>														
1.2.1	Tourism marketing leadership and actions for The Gambia: <ul style="list-style-type: none"> <li>• Capacity Building with long and/or short term TA, including 3-5 year strategic plan</li> <li>• Enhancement of the role of the private sector in tourism marketing with an enhanced and transparent role in the operations of the GTA</li> </ul>	●	●	●									GTA, supported by Dept of State for Tourism & Culture	Source of TA support to be identified; Agreement on modus operandi between Dept of State and private sector associations	100,000
1.2.2	Pilot marketing programme aimed at attracting new higher level business: TA and financial assistance		●										GTA	Source of donor financial support to be identified	250,000
1.2.3	Capacity building in tourism market data so The Gambia's tourism sector has measures of performance		●	●									GTA	CSO Approach to	50,000

	Project / Action	Year										Lead	Partners	Budget in US\$		
		1	2	3	4	5	6	7	8	9	10					
														UNDP/UNWTO		
1.2.4	Capacity building in reorganisation of TDA land, with site re-allocation for approved development projects and development briefs for key sites	●	●											GTA	Dept of State for Local Government and Lands, with TA to be identified	50,000
1.2.5	Capacity building in classification/licensing and regulation as a basis for a quality drive for hygiene in hotels and restaurants		●	●										GTA	Director of Medical Services	50,000
<b>2.</b>	<b>Destination Marketing</b>															
2.1	Rebranding initiative: research in key originating markets, preparation of comprehensive branding programme and branding toolkit for The Gambia			●										GTA	Source of TA support to be identified	125,000
2.2	Air Access programme: <ul style="list-style-type: none"> <li>• Scheduled airline promotion</li> <li>• GCAA airline incentive schemes (dependent on outcome of scheduled airline promotion)</li> </ul>	●	●	●	●	●	●	●	●	●			GTA GCAA	TA support GTA, Airlines	30,000 1,500,000 (income rebate)	
2.3	Tour operator incentive schemes			●	●	●	●	●	●					GTA	Tour Operators	1,500,000
2.4	Market research of further potential in US 'roots' market: contact with identified tour operators by phone/email		●											GTA	Tourism industry	30,000
<b>3.</b>	<b>Product Development</b>															
3.1	Research with EU tour operators on required product improvements in The Gambia for them to bring their higher spending customers, leading to an expansion of visitor attractions		●											GTA	Industry	50,000
3.2	Create attractive environment in existing TDA – seek to eliminate sand mining, eliminate deforestation, stop unapproved development and eliminate existing unapproved development		●	●	●	●								GTA	Kanifing LGA	100,000
3.3	Prepare action plans for Senegambia Tourism Centre and clean, secure and maintain undeveloped areas of TDA 1				●	●	●	●						GTA	Kanifing LGA Industry	500,000

	Project / Action	Year										Lead	Partners	Budget in US\$
		1	2	3	4	5	6	7	8	9	10			
3.4	Training of local tour guides with pilot programme at a location to be decided (potentially James Island and/or Jufereh)			●	●	●	●	●	●			GTA	Community Tourism Industry	50,000
3.5	Ninki Nanka Trail along the River Gambia – Local Accommodation, Traditional Crafts, River Transport			●	●	●	●					GTA	ASSET members Village Communities	100,000
3.6	Festival Programme for Gambia to enhance tourism – music, entertainment and culture			●	●	●	●	●	●	●	●	GTA	Tourism Industry ASSET, NCAC Local Associations	175,000
<b>4.</b>	<b>Quality in tourism establishments</b>													
4.1	Establishment of minimum standards for 'tourist hotels' and enforcement by licensing control; advise tour operators of properties that are no longer licensed; review of investment incentives for refurbishment				●	●						GTA	Technical assistance to be identified	150,000
4.2	Review of all-inclusive policy via policy research and study tour	●										Dept of State for Tourism & Culture		40,000
4.3	Institute annual Gambia tourism awards		●									GTA	Tourism industry associations	Sponsorship
<b>5.</b>	<b>Social issues</b>													
5.1	'Bumsters': <ul style="list-style-type: none"> <li>• Devise and implement bumsterism action programme including revenue earning activities for bumsters e.g. beach allocations for retailing and assistance with products for sale.</li> <li>• Plan and implement bumster free areas especially at the airport</li> </ul>			●	●	●	●	●	●	●	●	GTA	LGAs and NGOs	300,000
<b>6.</b>	<b>Human Resource Development</b>													
6.1	Improved customer service and opportunities for young Gambians by upgrading The Gambia Hotel School to National Tourism Training Institute: plan and develop to include hotel, cultural guides and bird watching guides			●	●	●	●	●	●	●	●	Gambia Hotel School	GTA	4,000,000
6.2	Training of trainers				●	●	●	●	●	●	●	GHS	GTA	400,000

	Project / Action	Year										Lead	Partners	Budget in US\$
		1	2	3	4	5	6	7	8	9	10			
<b>7.</b>	<b>Responsible Tourism</b>													
7.1	Linkage of mainstream travel industry with community development and poverty alleviation		●	●	●	●	●	●	●	●		ASSET Tourism Concern	GTA Tourism Foundation (UK)	200,000
<b>8.</b>	<b>Linkages</b>													
8.1	Secure the future of 'Gambia is Good' and develop other similar programmes	●	●	●	●	●	●	●	●			Concern Universal/other NGO's		100,000
<b>9.</b>	<b>Infrastructure</b>													
9.1	Management to prevent fire and speedy closure of Bakota Solid Waste Dump		●	●	●							NAWEC	LGAs	250,000
9.2	Rehabilitation of Kotu Wastewater Treatment Plant, including extension of the sewage system		●	●								NAWEC	LGAs	150,000
9.3	Installation of a drainage system and interceptors at Kotu power plant to prevent oil spills and waste oil storage; initial one month study required		●	●								NEA	NAWEC	30,000 (for TA to assess main causes of pollution and provide solutions)
9.4	Resolve reliable provision of electricity		●	●	●	●								National Agenda
9.5	Support and encouragement for construction and operation of a private health clinic available to tourists as well as Gambians					●	●	●	●	●	●	Private sector	DOSTC, Ministry of Health	To be defined



## Second Rank

The following projects are highly desirable in terms of product improvement, aimed at linking with private sector development in improving product quality in order to secure higher spending visitors, with a more diversified clientele that can form a basis for the progressive expansion of tourism into new areas and activities.

	Project / Action	Year										Lead	Partners	Budget in US\$
		1	2	3	4	5	6	7	8	9	10			
<b>3.</b>	<b>Product Development</b>													
3.7	Information Centres				●	●	●	●				GTA	Industry	200,000
3.8	Beach Quality: 'Blue Flag' beach project employing bumster labour				●	●	●	●				GTA	Kanifing LGA Environment	100,000
3.9	Prepare plans and implement Kololi Beach Park		●	●								GTA	Kanifing LGA Industry	150,000
3.10	Prepare plans and implement Kololi Parkway and Bird Watching Centre			●								GTA	LGA, Min of Agric, Bird-watching Assoc.	100,000
3.11	Prepare plans and implement Bijilo Forest			●								GTA	LGA DOSTC	50,000
3.12	Prepare plans and implement Western River Trail				●	●	●	●				GTA	LGAs	50,000
3.13	Prepare and implement Tourism Signage Programme				●	●	●	●				GTA	LGAs	50,000
3.14	Prepare plans for other areas, as necessary			●	●	●	●	●	●	●	●	GTA	LGAs	125,000
3.15	Development of visitor centres at one or more heritage sites, to include revenue earning activities (retail, food & beverage), working with communities – initially in Jufureh, Banjul Heritage Trail and Fort Bullen		●	●								National Council for Arts and Culture	Community Tourism industry	100,000
<b>6.</b>	<b>Human Resource Development</b>													
6.3	Tourism awareness programme				●	●	●	●	●	●	●	GHS	GTA	500,000

	Project / Action	Year										Lead	Partners	Budget in US\$
		1	2	3	4	5	6	7	8	9	10			
<b>7.</b>	<b>Responsible Tourism</b>													
7.2	Encourage development of eco-beach and eco-'bolong' lodges in South Coast and Western River Areas		●	●	●	●	●	●	●	●	●	GTA		100,000
<b>8.</b>	<b>Linkages</b>													
8.1	Institutional support to producer associations		●	●	●	●	●	●	●	●	●	Min. of Agric.	GTA	200,000
<b>9.</b>	<b>Infrastructure</b>													
9.5	Construction of storm water drainage and control of runoff from developments adjacent to the beach to a standard that safeguards the beach from erosion and the bathing water from contamination		●	●										National Agenda
9.6	Control of waste burning in and around the TDA, followed by better management of domestic solid waste collection and treatment		●	●	●	●								National Agenda
9.7	Green Hotel Programme		●	●								GTA	Industry	100,000
9.8	Back-up generators at NAWEC's borewells		●									NAWEC		250,000
<b>10.</b>	<b>Environmental Management</b>													
10.1	Environmental Improvements		●	●	●	●	●	●	●	●	●	NEA	DPWM	500,000