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REPORT OF THE 6TH EDITION OF THE TOURISM INVESTMENT AND BUSINESS FORUM FOR AFRICA (INVESTOUR)

Note by the Secretary-General

The Secretary-General informs the Members of the Commission about the Report of the 2015 edition of the Tourism Investment and Business Forum for Africa (INVESTOUR), a joint initiative of the World Tourism Organization, the International Tourism Fair of Madrid (FITUR) and Casa África in representation of the Spanish Government.

REPORT OF THE 6TH EDITION OF THE TOURISM INVESTMENT AND BUSINESS FORUM FOR AFRICA (INVESTOUR)



1. Introduction

The Tourism Investment and Business Forum for Africa (INVESTOUR) was held on 29 January 2015 in Madrid, Spain. It was the sixth edition of the Forum, jointly organized by the World Tourism Organization (UNWTO), the Madrid International Tourism Fair (FITUR) and Casa África (organization representing the Government of Spain), on the occasion of the 35th edition of FITUR.

The Forum's main objective is to promote the development of sustainable tourism in Africa, while encouraging exchanges on investment and business opportunities in Africa. Each new edition of INVESTOUR has been an opportunity to introduce a certain number of innovations. Initially open to representatives of African national tourism administrations, the Spanish Government, African and Spanish private-sector actors, the Forum was expanded last year by welcoming the participation of Portuguese private-sector actors. For its 6th edition, INVESTOUR was open to international institutions and companies.

INVESTOUR has once again demonstrated its legitimacy with the public and private sector as a strategic platform for the development of African tourism at FITUR. Indeed, FITUR is one of the world's most important tourism fairs, and in its context, INVESTOUR serves as an excellent showcase for African tourism. Approximately 450 people registered for this year's event, demonstrating that this meeting has created, along the way, a legitimate expectation on operators interested by African tourism.

The Spanish Government used this opportunity to symbolize a step forward in its line of cooperation with Africa in this edition, with the participation of three of its major figures. H.E. Mr. José Manuel Soria López, the Minister of Industry, Energy and Tourism officially opened the Forum whilst the Secretary of State for Tourism, H.E. Mrs. Isabel Borrego Cortés, was in attendance and formally closed the Forum. H.E. Mr. Ignacio Rubio Ybañez, the Secretary of State for Foreign Affairs also graced us with his presence at the event.

Following one of the recommendations from last year for sponsorships, INVESTOUR for the first time enjoyed the support of the Spanish airline company BINTER as a sponsor for the event. BINTER made a financial contribution towards the event and in turn benefitted from the visibility, advertising, and promotion of its brand through the INVESTOUR platform.

The two-session structure of this important event has been maintained. The first session, devoted to round tables, offered participants the opportunity to discuss and exchange views on two topics:

1. The Investment in Human Capital,

2. The impact of Africa's brand image on foreign direct investment (FDI) in the tourism sector: Situation and trends.

These two important issues were discussed and yielded valuable insights from the participants of the round table session on how to increase the competitiveness of African tourism at the global and regional levels. The composition and level of the panels were remarkable and appreciated, with moderators from the African Development Bank, the bank responsible for promoting economic development and social progress in African countries, and BANCO SANTANDER, the first Spanish bank and one of the most important financial institutions in Europe. Moreover, the panelists included several African Ministers, experts and officials from the Spanish School of Industrial Organization (EOI), the IATA¹ Institute of Training and Development, BINTER and Horwath HTL, one of the world's largest consulting organization specialized in the hospitality industry.

The second session of the Forum was devoted to business-to-business (B2B) meetings. This constituted a strategic platform that put African tourism project leaders and potential international partners in direct contact with one another. It was also an opportunity for international companies to become known by representatives of African governments, to exhibit their capabilities in terms of expertise and to demonstrate their commitment to Africa, where all the economic projections are quite positive.

2. First Session

The first session of INVESTOUR started with the arrival of the dignitaries who had joined for the opening of the forum; The Spanish Minister of Industry, Energy and Tourism of Spain, H.E. Mr. José Manuel Soria López, H.E. Mrs. Isabel Borrego Cortés, Secretary of State for Tourism of Spain, H.E. Mr. Ignacio Rubio Ybañez, Secretary of State for Foreign Affairs of Spain, Mr. Luis Padrón, the General Director of Casa África, Mr. Luis Eduardo Cortés, the Chairman of the IFEMA Executive Committee, H.E. Mr. Taleb Rifai, the Secretary General of UNWTO and the following Ministers of tourism of Africa and the Middle East:

1. H.E. Mrs. Leonessa Fortes, Cabo Verde,
2. H.E. Mr. Maigari Bello Bouba, Cameroon,
3. H.E. Mr. Roger Kacou, Côte d'Ivoire,
4. H.E. Mrs. Elizabeth Ofosu-Adjare, Ghana,
5. H.E. Mr. Adel Fahad Shrshab, Iraq,
6. H.E. Mr. Michel Pharaon, Lebanon,
7. H.E. Mrs. Naha Mint Hamdi Ould Mouknass, Mauritania,
8. H.E. Mr. Lahcen Haddad, Morocco,
9. H.E. Mrs. Yahaya Baare Aoua Abdou, Niger,
10. H.E. Mr. Abdoulaye Diouf Sarr, Senegal,
11. H.E. Mr. Alain St. Ange, Seychelles,
12. H.E. Mrs. Mohamed Abdelkreem Elhad, Sudan,
13. H.E. Mrs. Jean Kapata, Zambia,
14. H.E. Mr. Walter Mzembi, Zimbabwe,

¹ International Air Transport Association

15. H.E. Mr. Vicente Fernandes, Secretary of State for Tourism, Guinea-Bissau.

The dignitaries, ambassadors and head of delegations from participating countries posed for an official photo before proceeding to the opening ceremony. Right after the official opening of the forum the participants witnessed the signing of a cooperation agreement between UNWTO and Casa Africa to develop and publish a publication entitled "Tourism Products: Building Development in Africa. This was straight away followed by the two round table sessions and the first part of the program ended with the closing remarks by H.E. Mrs. Isabel Borrego Cortés, Secretary of State for Tourism of Spain.

2.1. Opening ceremony

The opening ceremony started with the welcome address of Elcia Grandcourt, the UNWTO Regional Director for Africa, who had the honor to serve as master of ceremony for the event. She introduced and invited the following speakers for their opening remarks; Mr. Luis Padrón, General Director of Casa África, Mr. Luis Eduardo Cortés, Chairman of the IFEMA² Executive Committee, H.E. Mr. Taleb Rifai, Secretary General of UNWTO and finally invited H.E. Mr. José Manuel Soria López, the Spanish Minister of Industry, Energy and Tourism to officially launch open the forum.

Mr. Luis Padrón, welcomed the participants to the sixth edition of the Forum and expressed the satisfaction of Casa África, who has witnessed how the INVESTOUR project consolidates and grows stronger every year. For him, the growing number of African tourism ministers not only shows the interest that this region has for tourism, but also demonstrates that this forum is more than ever an international reference and a space for reflection and a meeting point.

While recalling what is Casa África, a Consortium formed by the Spanish Ministry of Foreign Affairs, the Government of the Canary Islands and the Municipality of Las Palmas, Mr. Luis Padrón then emphasized the role of public and economic diplomacy of that organization, with the countries of the African continent and a perfectly objective summary slogan: Africa and Spain closer and closer. As a good example of this close relationship, the Director General of Casa África mentioned the presence of the King of Spain in the 24th Summit of the African Union to be held from 30 to 31 January 2015 in Addis Ababa (Ethiopia).

Mr. Luis Padrón then concluded his speech by thanking solemnly the sponsor of the sixth edition of INVESTOUR, the Spanish airline BINTER, which made air connectivity with Africa one of its challenges for the future.

After the intervention of the Director General of Casa África, it was the turn of Mr. Luis Eduardo Cortés, Chairman of the Executive Committee of IFEMA who first raised that tourism is one of the most important economic activities in the world. Then, speaking of tourism in Spain, he referred to the different forms of tourism developed here: health tourism, business tourism, cultural tourism and shopping tourism. According to Mr. Cortés, Spain hosted last year more than 65 million tourists,

² IFEMA is the Fair Institution of Madrid (Spain), which annually organizes exhibitions related to different economic sectors

which made the country one of the tourist world powers. But it's very important to underline that this is only the fruit of the good job done by the country.

Mr. Cortés then mentioned the importance of the roundtable sessions that were to take place during the first session of the Forum, as it is impossible to think how tourism can play an important role without counting on the human capital. He also magnified Africa, calling it an important and wonderful continent. But he drew attention to the fact that if a country wants to play a significant role in tourism, it is essential to guarantee the safety of tourists, to have transportation and efficient connectivity and, once again, a good human capital.

H.E. Mr. Taleb Rifai, Secretary General of UNWTO, in turn, thanked the Minister Soria for his presence, despite a tight schedule. He then called him an exceptional Minister, the one who is not only convinced by the importance of INVESTOUR, but also aware of the strategic position of Spain vis-à-vis Africa and the rest of the world. He also thanked the Spanish Secretary of State for Tourism, H.E. Mrs. Isabel Borrego for her presence. According to Secretary General of UNWTO, INVESTOUR is the testimony of the strong and robust support of the Spanish Government to the African tourism, and at the same time recognizing the fundamental role that tourism can play in the development of Africa. H.E. Mr. Taleb Rifai also welcomed all African and the Middle East ministers present and, highlighting that tourism is the most important tool that can be used for these countries to compete with others.

After the intervention of the Secretary General of UNWTO, H.E. Mr. José Manuel Soria López, Spanish Minister of Industry, Energy and Tourism was invited to officially open the forum. In his address, Minister Soria thanked Mr. Luís Padrón for his support to the Spanish economic diplomacy under the leadership of the Minister of Foreign Affairs, H.E. Mr. José Manuel García-Margallo. He thanked the Chairman of the IFEMA Executive Committee for the good work done to welcome once again FITUR. His thanks also went to the Secretary General of UNWTO. According to Minister Soria, under the leadership of UNWTO Secretary General, H.E. Mr. Taleb Rifai, tourism has turned into one of the most dynamic sectors of the global economy. Finally, the Minister Soria thanked his counterparts Ministers in charge of tourism in African countries who, according to him, made a safe bet for the tourism sector.

Subsequently, the Minister Soria stressed that for many years we have been hearing that Africa is the continent of the future. But, "That future is already here. This future is the present moment", he said. Africa is as a set of countries and companies full of opportunities not only for African, but also for the rest of the world. It is true that there are limitations, weaknesses, imbalances, evident and unacceptable levels of poverty, hunger, conflicts, but all of these are obstacles that we all have to break. However, in Africa, there are economies with growth rates above 5%, 6% or 7%; there are economies where income levels are available in full growth; there is a young population willing to work, with a dream, a project, and this is the greatest strength of Africa, not to mention its various minerals and hydrocarbons, etc. Minister Soria conveyed the message that under the leadership of the Government of Mariano Rajoy, Spain wants and is willing to provide African countries all the experience it has accumulated over the past 60 years in the development of tourism.

Minister Soria before declaring INVESTOUR officially opened reminded the audience that the relationship between Spain and Africa is fraternal and sincere. He has for this purpose reassured his African counterparts that, since 1 January 2015, Spain is a non-permanent member of the UN

Security Council and is willing to work in favor of anything that can contribute to stability, peace, democracy and institution building in African countries.

2.2. *First round table*

The first round table on "Investment in Human Capital" was moderated by Mr. Steve Kayizzi-Mugerwa, Acting Chief Economist and Vice President of the African Development Bank Group, the largest development bank in Africa in financial terms, with a capital of 100 billion US dollars.

In his introduction, the moderator stressed the importance of human capital, highlighting the case of Spain, which, thanks to this fundamental factor, could benefit from different high level types of tourism: health tourism, seaside tourism and the cultural one. He took the opportunity to thank the organizers of INVESTOUR i.e., UNWTO, FITUR and Casa Africa, as INVESTOUR can be an important means to improve the situation of tourism in Africa. According to Mr. Kayizzi-Mugerwa, Africa receives only 6% of the world total international tourist arrivals and in contrast, only 3% of the volume of global revenue of the tourism global sector. This is a big gap that needs intensified efforts to be able to fill it. That is why, before giving the floor to the various panelists, he recalled the three questions that were to guide the discussion at the roundtable:

- What is needed for African destination to reach international standards in terms of service quality?
- How can the public and private sector cooperate to advance human resources capacity building for African tourism professionals?
- How can investors contribute to improve Africa's tourism human capital?

HE Mrs. Naha Mint Hamdi Ould Mouknass first noted that human capital is a topical issue in the world because it is true that the professionals in tourism industry, as in other sectors, should have the best skills and the best qualifications. In Africa, everyone is aware of the importance of the tourism sector. This is why tourism deserves full recognition for its economies. In Mauritania for example, from 1996 to 2000, tourism has been in a tremendous growth and the poverty rate decreased from 50% to 23%. She also reminded the UNWTO data on tourism demand in Africa: the number of international tourists visiting Africa increased from 26 million in 2000 to 56 million in 2014. These data are encouraging but it is clear that the distribution is very uneven, the North and South of the continent enjoying the good majority of these arrivals, while the rest of the region benefits from very little. According to the Mauritanian Minister, the human capital deficit has a big responsibility for this failure and the poor distribution. It is true that there is a wide variation between the countries in terms of policy and in terms of human capital, but it is also clear that there is an essential requirement of training and investment in human capital across the continent. H.E. Mrs. Naha Mint Hamdi Ould Mouknass also diagnosed the difficulties of African tourism, summarizing in:

- A very low rate of participation;
- A strong correlation between education and employment;
- A high dropout rate;
- Learning and higher education providing too few professional qualifications.

The Minister concluded that it was necessary to bet for training and vocational education to better suit the demand of economies and labor market needs, and then gave the floor to the second panelist, Mrs. Nada Roudies, the Secretary General of the Ministry of Tourism of the Kingdom of Morocco.

The Secretary General of Morocco's Ministry of Tourism, in turn, reveals that it is true that when we talk of investment in African tourism, it has often relegated to the background the necessity to invest in human capital. She emphasized that it is very difficult to develop tourism without qualified personnel. According to Madame Roudies, we may well invest in many other sectors, but people will ultimately have the responsibility for the management and service. Referring to the Moroccan reality, a serious approach was initiated on human capital, not only quantitatively but also qualitatively. Indeed, 130,000 graduates are being trained with the help of the government in order to create in the next 10 years half a million jobs. Furthermore, since the government wants to make Morocco a modern destination in terms of sustainable development, it is also working to professionalize the tourism sector with various training programs.

HE Mr. Abdoulaye Diouf Sarr, Minister of Tourism and Air Transport of Senegal briefly brushed the situation in his country. To reposition Senegal in the field of tourism, the government decided a Strategic Emergency Plan (PSU) to reconfigure the economy for development based on investment. While hammering how tourism is a priority for his government, the Senegalese Minister stressed that the PSU could not be achieved without skilled and qualified human resources. It is for this reason that a new dynamic training accompanies the PSU with a strong involvement of the private sector and an awareness program and evaluation of all that is happening in the sector.

Mr. Alfonso Seoane Yarza, Director of Strategy and Business Planning of Spain's School for Industrial Organization (EOI) subsequently spoke, referring to the nature of that institution. The EOI is the oldest business school in Spain, 100% ownership of the Ministry of Industry, Energy and Tourism, which is celebrating its 60th anniversary. According to Mr. Seoane, the creation of EOI is the demonstration of the importance of investment in human capital in the development of Spanish tourism. The ministry had long understood that although investing in various infrastructures related to the sector, it was necessary first to do so in human capital. He also called on countries to get to the EOI, exchange experience and knowledge to develop together investment projects in human capital.

The aviation sector is one of the most important in the tourism industry. It is in this sense that Mr. Victor de Barrena Sarobe, Director of IATA Training and Development Institute, acclaimed for his brilliant speech, held to analyze the situation of human capital in relation to this sector in the African continent. He is the right person for this purpose, because 90% of the air traffic of passengers and goods are covered by IATA member airlines. The IATA Training and Development Institute has trained over 95,000 students in the world, including Africa. He then reviewed the most important aspects in the field of human capital in Africa.

According to Mr. de Barrena, the first task in Africa is to expand the number of personnel in the tourism sector in general and in particular aviation. The personnel should be well trained to be able to operate according to best practices at national and international level. Mr. de Barrena highlighted that training in Africa is seen as a privilege and it is actually not accessible to all. Furthermore, even when training programs are implemented in the region, it is rather reactive and non-strategic, turning more often around the regulations or safety. So, there is no training planning strategy in the region, at least in the field of aviation, he said.

The Director of IATA Training and Development Institute continued by proposing to develop in Africa a training policy in business administration and management. Indeed, the human capital must play a more vital role in business planning strategy, for the benefit of marketing plans and the development of the aviation sector in the region. Another component was also opened, to enhance the quality in training, creating training centers and centers of excellence to ensure consistency in training,

international standards in aviation, as in other fields. The issue of funding is not left out, but the most important challenge that aviation will face over the next 20 years in Africa is none other than the shortage of skilled labor, pilots, engineers, technicians and others, given that most of them often move to other regions that offer many more opportunities, concluded Mr. de Barrena.

The General Coordinator of BINTER, Mr. Juan Ramsden, made his introduction by presenting the company he represents and which is already investing in Africa. He thinks that Africa is a continent of the future, a place of opportunities. However, according to the staff of BINTER, it seems to them that the public sector can do much better in the development of tourism, but they doubt that it is well positioned and oriented. This situation is not exceptional, because Spain has been in the same situation. 40 years ago, nobody could imagine that Spain could reach the record figures the country has today in inbound tourism, and Africa can also do that. Mr. Ramsden said it is very nice to have theories, to have the will to create schools of excellence and such, but what it's better to do now is investment. And investment comes from the private company. The development of tourism is not possible without the private sector. And for private company to come, we must give it the resources, infrastructure and above all good legislation.

After the intervention of the General Coordinator of BINTER, it was the public to ask questions or to make observations or comments on the subject. Thus, H.E. Mr. Alain St. Ange, Minister of Tourism and Culture of Seychelles refuted the perception that Africa lacks quality service, much less infrastructure. He argued stressing that in Africa there are hotels which are among the finest in the world. Certainly, Africa has some difficulties, but it is unfair to say that Africa is lagging behind. According to the Seychelles Minister, what is necessary to do is an inventory of all the potential available in Africa in all areas, infrastructure, schools and academies, and many others, and see how to use them to help the continent, with the support of various organizations in the region such as RETOSA, African Union, banks, etc. H.E. Mr. Alain St. Ange recalled what he used to proclaim, that "Africa must work with Africa", if it wants to progress and develop. And to work with Africa, we must know Africa and find out what is available. So, he invited his counterparts, African tourism ministers, to work in this direction, that is to say, put together all the assets of the continent so that they are available in the region and with this method, the development of tourism in Africa is assured.

Mr. Kayizzi-Mugerwa, the moderator, wanted anyway to add a nuance to the intervention of the Seychelles Minister. He acknowledged that the Seychelles are an ambitious nation with an excellent tourism infrastructure, a beautiful country that has fought to get the international standards and attracts tourists from China, Europe and others. However, it is difficult to argue that what we find in the Seychelles can be generalized to the rest of the continent.

Subsequently, Dr. Kenneth S. Ombongi, Principal of Kenya Utalii College, wanted to know what we can do in Africa to change this widespread perception of young people that train or while working in hospitality or in tourism, is only a second appeal, if not the last when one has nothing more to do. Dr. Ombongi also noted that when we often look at Africa, we realize that African people are too critical of themselves. Yet all is not so bad. The example of Kenya Utalii College, high school of tourism headed by Dr. Ombongi, was founded in 1969 and has so far trained more than 60,000 graduates who work in the world. This is an experiment that worked, but why do not reproduce it in other African countries, he concluded.

Mr. David Diaz-Benavides from the University of Aix-Marseille III in turn raised the challenge that Africa faces today: "Africa must not clone human capital. It is necessary to establish an African human capital". In this regard it is important to see now many more African consultants doing the work that European consultants have been doing in Africa for decades. The main condition must be

the development of a roster of African consultants who can immediately create schemes of African human capital.

Returning to the issue of the attractiveness of jobs in tourism and perceptions at the youth level, the Secretary General of Morocco's Ministry of Tourism proposed that everything must be done to change this misperception. Advocacy work must be done to fight against the confusion in the sector. In Morocco for example, it is very important to sort out the confusion between good service and servitude. According to Mrs. Roudies, give more visibility to the business, career profiles and "success stories" of the sector, good salaries for its workers are actions to complete.

Mr. Alfonso Seoane Yarza, Director of Strategy and Planning for the Spanish School of Industrial Organization (EOI) has responded to this concern on the attractiveness by three elements. Mr. Seoane is convinced that young people will have an interest in the tourism sector in the same proportion that their governments will have an interest in tourism. We must also fight against the problem of seasonality, which makes jobs in the sector most often temporary. Finally, Mr. Seoane advocates putting a boost to the training of trainers, because that is the beginning of any solution. The Director of IATA Training and Development Institute advocated for stimulating public-private partnership while Mr. Juan Ramsden BINTER defended the liberalization of the African market with more security guarantees.

The moderator then concluded the roundtable by thanking the panelists and all participants for their fruitful exchange.

2.3. Second round table

The second round table on "The impact of Africa's brand image on foreign direct investment (FDI) in the tourism sector: Situation and trends" was moderated by Mr. Rafael Gomez-Jordana Moya, Africa Regional Director of Banco Santander.

The moderator started with a brief presentation of the panelists. He then spoke briefly of Africa. Mr. Gomez-Jordana, Africa is a mosaic of 54 countries each with its specificities. This should bring all analyzes to take into account this diversity and plurality of the region. In 2014 for example, there have been situations in Africa linked to the global economy such as the slowdown in emerging markets, declining prices of commodities, etc. Yet much of the continent has maintained its momentum with average growth of 5.5%. In the opinion of Mr. Gomez-Jordana, average growth should be 7%, given the demographic profile of the region. This difference with 5% in 2014 is certainly due to inadequate infrastructure paralyzing economic growth. Change of infrastructure in Africa will bring growth rates comparable to those of Asian markets, he added. But there are many other challenges such as the removal of non-tariff barrier to facilitate trade in the region.

According to Mr. Gomez- Jordana, the three essential drivers of growth in Africa are: investment, domestic demand and regional trade. To build a modern economy, the countries of the region must invest in manufacturing, as opposed to simply export raw materials. In addition, it requires institutions that guarantee the rule of law, equity, predictability of policy and social cohesion. Speaking of tourism, Mr Gomez-Jordana reveals that the region is the second destination in terms of growth after Asia-Pacific, its major assets being its people, humanity and warm hospitality. However, these assets require urgent acceleration of regional and international investment through a public-private partnership to build sustainable growth.

After that, the moderator asked three basic questions to the panelist:

- How the image of Africa impacts FDI in tourism?
- How to boost Africa's tourism image to attract growing FDI in tourism?
- How to leverage partnerships and knowledge among governments, international and regional organizations, and the private sector to grow FDI in tourism?

The first panelist to answer these questions was Hon. Walter Mzembe, who highlighted the fact that the image of Africa has much to do with the perception of the continent. He reminded the audience that there are many indications of investment attractiveness demonstrating that Africa has made significant progress in this direction. But in terms of perception, the Zimbabwean Minister recognized that Africa still has a long way to go because there is not a very positive perception of the continent. But why does it have this gap between the attractiveness and the negative perception of our country, he asked? The reality, he said, is that the image projected by Africa to the world is that of hunger and conflicts. But that image is imposed on the region for reasons that are exogenous. Africa must win the battle of perception, since no one disputes the fact that the products and resources of the region are attractive. Africa has the largest reserves of oil, gold and other minerals. H.E. Mr. Walter Mzembe is convinced that Africa can be the center of attention around the world, if it is able to present in a positive way its natural resources.

As a tourist destination, the Zimbabwean Minister recognizes that Africa has a lot to do. To attract foreign investment, he already calls for action from its counterparts and decision-makers in the room to meet this challenge. Regarding the issue of insecurity in the continent, it advocates a rationalization of the situation. Indeed, it is a problem that does not affect all countries, let alone all regions, in the same way, at the same level. Even within Nigeria, a very attractive country, Boko Haram does deep damage in a concrete area and there is a vast majority of the territory which does not know these disorders. Why should the whole country be penalized? Hon. Mzembe concluded by calling tourists from all over the world to come to Africa to enjoy the best that Africa is able to offer.

H.E. M. Roger Kacou, the Minister of Tourism of Côte d'Ivoire then shared the vision of his counterpart from Zimbabwe on the perception of Africa. However, he attracted the attention of the audience to the fact that the countries of sub-Saharan Africa are experiencing growth rates of 5-6%, just below those in Asia. It is true that this growth is boosted by incomes from oil, gas, mining and other. But for now tourism does not contribute significantly to the development of economies in the region, he acknowledged. This is due to the fact that tourism is an activity that does well with peace, political and social stability, security, health and hygiene, key aspects to keep in mind regardless of the potential of tourism products that a reference country can have. Over the past twenty years, Africa has also experienced instability with coups d'état, epidemics such as Ebola. But there is especially a poor communication on these matters and these situations are inappropriately generalized throughout the region. Ebola is an evil present in three countries, but all countries, even South Africa or Zimbabwe, far away, have suffered numerous cancellations of bookings since the beginning of the epidemic. Yet in these other countries, there is no case of Ebola.

According to Minister Kacou, the image of Africa must be restored and it is to African people to do so. He highlighted to this effect the responsibility of African leaders and urged them not to allow communication on African problems in the hands of "others." This would help to avoid stigmatization or amalgam on these problems.

Par la suite M. Stéphane Durand, Président de Horwath HTL, a pris la parole. Il a développé deux idées intéressantes. Premièrement, le tourisme sert non seulement au développement économique général, mais aussi à l'attractivité des pays. De plus en plus dans un monde globalisé, les pays qui

seront touristiques seront les pays crédibles sur le plan économique. C'est pour M. Durand, un gros argument pour attirer les talents, et pour les entreprises d'avoir une vraie économie touristique.

Then it was the turn of Mr. Stéphane Durand, President of Horwath HTL, to speak. He developed two interesting ideas. First, tourism not only boosts general economic development, but also the appeal of countries. In the globalized world we are living in today countries with a developed tourism industry will also enjoy economic reliability. This is according to Mr. Durand a strong argument to attract talent and to draw companies to establish a real tourist economy.

Second, to overcome image problems, Africa needs strong specific products and offers. In many African countries, the tourism sector was built 30 or 40 years ago, on very old models. To this end, Mr. Durand proposed to invent new concepts of accommodation, forms of tourism and resorts appropriate to the world of the twenty-first century. Countries are more aware of the economic importance of tourism, its effect on global image and the need to be truly innovative. Africa has to show the will to tourism development, build a credible framework for investors, stability also, and must be able to impose its new concepts ranging from ecotourism, nature tourism, beach, to a cultural and very particular human dimension of the continent.

The President of Horwath HTL believes that it is the responsibility of the states, with the support of UNWTO and consultants to create these new concepts of venues, resorts, accommodation. He concluded that this will be the best way to attract investors for credible projects and also over time, to change the image of Africa and its tourism.

Mr. José Armando Duarte, President and CEO of Cabo Verde Investimentos, in turn stressed that tourism should be a matter of choice of our governments. It is necessary that African governments, political authorities, tourism agencies take tourism as a promising sector for the economic future of Africa. Mr. Duarte suggested that tourism has to be recognized structurally as an important economic sector. It has also to be recognized politically. There is also a need to diversify and create valuable products, supporting the thesis of the President of Horwath HTL. He concluded by reiterating that everything is first a matter of choice and that the development of tourism in Africa will be very difficult if governments do not assume this choice.

After the tour of the panelists, the moderator invited comments and questions from the audience with Mr. Yahya Ould Rajel, a Mauritanian storyteller guide, spoke as a "man of the field." What is missing in Africa is to speak well of its image, he said, urging the media to do their job well and broadcast only the truth on Africa. The media should also mention that there are positive things in Africa and not be restricted to amalgam. He is convinced that there are many good initiatives in this continent that should also be published in the media.

H.E. Mr. Alain St. Ange returned for his part on the idea of African working together. How to sensitize the countries of the region for this purpose? Africa has "blocks" such as SADC, RETOSA, African Union, UEMOA, CEMAC and many others. They must find ways to put them together to create what he called the "Brand Africa" and put it in the front. The Minister of Seychelles emphasized that since African countries depend on the same tourist source markets - Europe, Americas, Asia - it is necessary to find ways to move the source markets and refine the "Brand Africa" which will flourish, bring trade to Africa and consequently put money in the pockets of its citizens.

H.E. Mr. Mohamed Abdelkreem El Had, Minister of Antiquities, Tourism and Wildlife of Sudan, supported the idea that African countries should work together more than ever, exchange know-how

and experience. He proposed the countries of the region to be more focused on investment and especially those in the tourism sector. He therefore called on the African Development Bank to support more countries in this direction. Such appeal was also made to UNWTO and Spain. The Sudanese Minister highlighted that it should be interesting to have a real debate in Africa on the subject.

One delegate took the opportunity to ask the Minister Walter Mzembi what hitherto prevented the implementation of the solutions he proposed in his presentation as panelist and also the visa facilitation project. Hon. Mzembi answered that it is a question of political goodwill. That is why he urged African ministers to promote their lobby to enhance mobilization from the various regional blocs to continental level. Finally, it is necessary to promote an agenda on tourism. Hon. Mzembi appealed and referred to initiatives taken by the UNWTO, WTTC to develop a "golden book" with the relevant recommendations and commitments. That "golden book" which is signed by African Heads of States who commit to support the development of sustainable tourism in their countries and Africa. Senior managers should be more serious in the policies and objectives and bring them to the attention of the United Nations, in order to communicate them to market sources of African destinations. In the same vein, Africa needs to perform in connectivity to be able to facilitate the movement of tourists arriving in the region.

The Minister Mzembi also pronounced in favor of holding a high-level discussion, this time in Africa. It is also necessary to change the format of INVESTOUR; it is not enough to have the Spanish Minister of tourism just for the opening. It would be more interesting than the Spanish Minister remains longer and listen to the challenges and proposals for Africa because, according to Hon. Mzembi, Africa could no longer be happy talking to itself, it is time that Africa speaks to its market sources and Spain is part of them.

H.E. Mrs. Yahaya Baare Aoua Abdou, Minister of Tourism and Handicraft of Niger, came back on the image of Africa that is served in these source markets, taking the example of France. On the Quai d'Orsay web page there are many African countries (Niger, for example) classified in the red or orange zone of non-recommended destinations. The Minister takes this fact as "a form of embargo", that does not encourage tourists. And because of that tourism is dying in those countries. Yet, huge efforts are made by the countries, good governance being now part of the priorities of African leaders. For H.E. Mrs. Yahaya Baare, this is a plea to see if there are solutions to these "embargoed" countries to improve their image and make them competitive.

Another delegate from Niger mentioned examples of cooperation to capitalize and create in West Africa a harmonized tourism investment code. The « Visa Touristique Entente » initiative of West Africa allowed people to move freely in five countries in the region: Benin, Burkina Faso, Côte d'Ivoire, Niger and Togo. Also, the common tourism policy of UEMOA helped to develop a common tourist tax. Both initiatives are good ways to attract FDI and promote tourism in the region.

The Director of the Tourism and Hotel Board of Mali, Mrs. Sissoko Sirimaha Habibatou Diawara, for her part regretted that no panelist has emphasized the importance of statistics. For tourism to be a choice of governments, it is necessary that its importance is demonstrated by statistics, she said. She therefore called for strengthening statistical systems in African countries.

Mrs. Marianne Michelet, Euronews Senior Account Director Africa, came back on the fact that the communication of African countries on international media is non-existent, with some exceptions like Morocco, South Africa and Cabo Verde. The eruption of Ebola did much damage to the image of Africa but we did not see African countries communicating on it. According to Mrs. Michelet, African

countries must not allow international media to communicate on their behalf. She then asked if the UNWTO had a policy to help and support these countries in their communication in tourism.

The issue of planning was again raised in the audience. Occasional meetings as INVESTOUR where ministers and journalists are invited are often very expensive and unproductive. Governments should make that aspect a priority in the preparation of investment budgets.

Hon. Mzembe recognized the relevance of the points mentioned above. He then confirmed that without statistics, it is not even possible for a minister of tourism to convince his colleagues in the government of the importance of his portfolio. The solution of the Tourism Satellite Account proposed by the UNWTO is an appropriate way forward and the governments should invest in the statistics. Another vital element is planning. Hon. Mzembe emphasized the fact that very few African countries had a Tourism Development Master Plan and many others are working on it now. In addition, there is no law or statement that affects a certain percentage of the fiscal budget of African countries to tourism development. Yet it is clear that if we do not invest in tourism, we cannot collect enough from that sector. Zimbabwean Minister proposes a discussion at the summit with heads of state and finance ministers to build on this important point. Another important factor is the "war of perception". Hon. Mzembe regretted the frantic taste of African media to amplify the negative information and stereotypes about Africa. African people and their media are themselves the perpetrators of bad information on Africa. This is a war to win in African editorials because we now live in a globalized world where all information published in Africa runs as fast and is recovered few seconds later by other media anywhere in the world.

Another intervention was done by an artist and reporter who once again stressed the importance of image and highlighted how the big brands work and invest on their image to consolidate. He therefore asked the panelists what are the specific weapons that African countries have in their possession to confront the war of the image, to give an accurate description of the positive aspects of that continent. In response, Hon. Mzembe recalled with his Ministers of Tourism counterparts, they had decided to meet a few days before the opening of the next General Assembly of UNWTO in Colombia to discuss the issue. It is clear that the image of Africa is an important issue that should be a priority in the agenda of this upcoming meeting and the resolutions taken will be immediately sent to African Union for some execution mechanisms

In relation to what UNWTO is to support countries, the UNWTO Regional Director for Africa, Elcia Grandcourt, reminded the audience that the organization will hold this year in Accra, jointly with the Government of Ghana, a regional conference on "African Branding Image".

The moderator thanked all the panelists and all participants for their contribution to such an important issue, and closed the debate.

2.4. *Closing remarks*

H.E. Ms. Isabel Borrego Cortés, the Secretary of State for Tourism of Spain was honored to formally close the Forum. In her speech, she stressed that INVESTOUR proved to be a very important meeting point between the private tourism sector in the world and the African continent. She said that the challenge for tourism is a certain bet for an economic sector that is increasingly growing. The tourism sector is responsible for one in eleven jobs in the world, 9 % of global wealth, a sector that has become the main propeller of the infrastructure, improves business competitiveness and quality

of life in the country. According to the Spanish Secretary of State, tourism is a tractor of other sectors and the most resilient sector during difficult times.

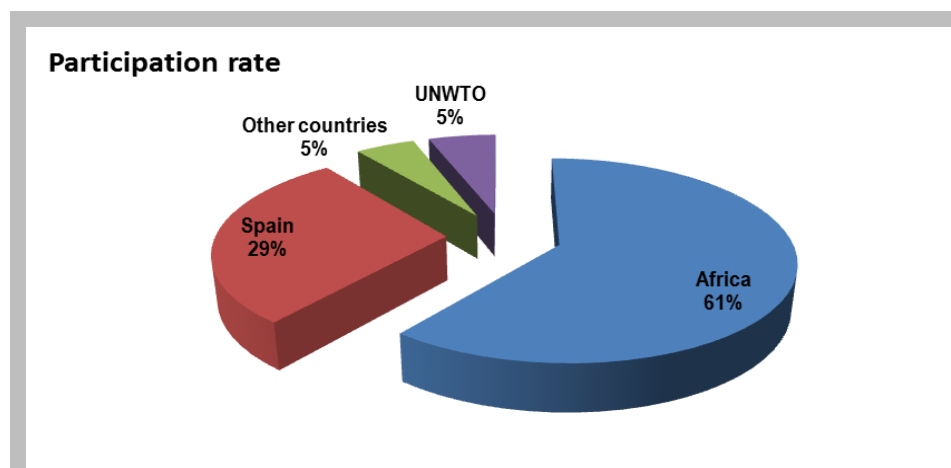
Having extolled the qualities of the Spanish tourism sector, the Secretary of State urged all participants to take advantage of this opportunity, INVESTOUR and FITUR, to make contacts with many companies willing to develop their activities, create new products and improve the management of tourist destinations in different countries.

H.E. Ms. Borrego finally urged the countries represented at the Forum to update the training of youth in tourism. She was confident that the relationship between all the countries present at the Forum will become closer and officially closed the first session of INVESTOUR 2015.

2.5. Participation data

The first session of INVESTOUR 2015 saw the participation of 289 persons from 42 countries of the world. To this we must add 17 representatives of UNWTO, which makes a total of 306 people. Of the 42 countries represented, 31 were African and other world countries are: China, France, Iraq, Jordan, Lebanon, Mexico, Poland, Switzerland, the United Kingdom, the United States of America and of course Spain. It should be noted that a total of 450 people registered for the Forum, which implies a real participation of around 68%. The distribution of participation can be read on the table and the graph below:

Origin	Number of participants	Participation rate
Africa	186	61 %
Spain	88	29 %
Other countries	15	5 %
UNWTO	17	5 %
Total	306	100 %



The distribution of participants per country is in the following table. Note that the delegation of Niger was the largest, with 22 members, followed by Senegal (18 members), Zambia (15 members), Ghana and Mozambique with 11 participants each. We also recall that this sixth edition of INVERSTOUR was graced by the presence of the Spanish Minister of Industry, Energy and Tourism; 12 Ministers of the African Tourism: Cabo Verde, Cameroon, Côte d'Ivoire, Ghana, Morocco, Mauritania, Niger, Senegal, Seychelles, Sudan, Zambia and Zimbabwe; 2 Ministers of the Middle East: Iraq and Lebanon; and three Secretaries of States, 2 from Spain and one from Guinea-Bissau.

Nº	Origin	Number of Participants
1	Algeria	2
2	Angola	1
3	Benin	9
4	Burkina Faso	2
5	Cabo Verde	4
6	Cameroon	4
7	Chine	1
8	Congo	1
9	Côte d'Ivoire	7
10	France	3
11	Gambia	5
12	Ghana	11
13	Guinea	3
14	Guinea-Bissau	8
15	Iraq	1
16	Jordan	1
17	Kenya	2
18	Lebanon	1
19	Mali	3
20	Morocco	8
21	Mauritania	4
22	Mexico	1
23	Mozambique	11
24	Namibia	3
25	Niger	22
26	Poland	1
27	RDC	16
28	Rwanda	3
29	Senegal	18
30	Seychelles	2
31	Soudan	1
32	Suisse	1
33	RSA	7
34	Spain	88
35	Tanzania	5
36	Chad	2
37	Togo	3
38	Tunisia	1
39	UK	4
40	USA	1
41	Zambia	15
42	Zimbabwe	3
Sub-total		289
UNWTO		17
TOTAL		306

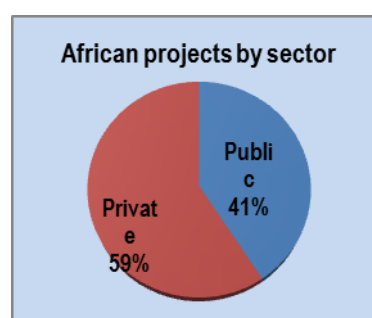
3. Second Session

The second session of INVESTOUR held from 16:00 to 19:30 in Room 105. Registration took place from 15:00 to 16:00 and the participants collected the meetings agendas at the same times. But already in the morning, while the roundtables were held in rooms 107-108, some participants in the B2B meetings registered and collected their meeting bookings. The second session was followed by a cocktail, offered to participants by INVESTOUR, from 13:30 to 15:00 in the Neptune Room on the 2nd floor of the Congress Centre North, and a lunch was offered for African and the Middle East Ministers by IFEMA and UNWTO in Colon room on the same floor.

The registration for the business to business meetings of INVESTOUR was opened in October 2015, when the first invitations were sent to public and private tourism stakeholders of UNWTO African member states. Registration was done online or by returning the completed registration form. The African participants of this second session were invited to give a brief description of the project to present during the Forum. The information of the forms received by the Secretariat of INVESTOUR was subsequently introduced on the online platform. Registrations after extension of the deadline were closed on 26 January 2015, to allow time for the organizers to proceed with the business to business matchmaking and refine the meeting agendas. As in the previous edition, a payment of 100 euros was required to non-African companies to participate in this session of B2B meetings.

In total, 146 projects have been presented to Spanish and international companies/institutions by African bodies during the B2B meetings. These projects from the public and private sectors are classified as follows:

Type	Number
Infrastructures	37
Travel agencies	13
Tourism promotion	29
Ecotourism	34
Training and know-how	16
Others	17
Total	146



The results of the satisfaction survey of participants on the B2B session is on the table below. As it can be seen, although 50% of respondents were satisfied or very satisfied with B2B meetings. Another 25% were slightly satisfied. That shows that the session went well. However a few respondents complained that some organizations which confirmed their presence did not honor the appointment.

	☹ Not Satisfied or Very Poor	😐 Neither Satisfied nor Not Satisfied or Poor	😊 Slightly Satisfied or Average	😄 Satisfied or Good	👍 Greatly Satisfied or Very Good
<i>Level of satisfaction</i>	17%	8%	25%	25%	25%

4. Comparative of various editions participation

The evolution of the number of participants in the Forum is recompiled in the table and graph below:

Year	2010	2011	2012	2013	2014	2015	Average over the six editions
Africans	193	134	124	148	180	186	161
Spanish and others	111	66	99	90	89	120	96
Total of participants	304	200	223	238	269	306	257

The sixth edition of the Forum held in 2015 broke the record of the total number of participants (306) and particularly international delegates (not African, 120). But 2010 remains the year there were more African participation (193). After a decrease in 2011 (200), the total number of participants in INVESTOUR continues to grow.

