

An evaluation of the tourism value-chain as an alternative to socio-economic development in Rwanda, Africa

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Abstract

Tourism is a leading industry in the service sector on a global level, as well as a major provider of jobs and a significant generator of foreign exchange. Tourism is probably one of the largest and fastest growing industries in the global economy. During the period between 2006 and 2012 international tourist arrivals worldwide grew at an average annual rate of about 4.0 per cent. In 2006 there were 846 million tourists, and in 2012, 1.04 billion. The tourism industry consists of various stakeholders, and tourism demand is met by the joint efforts of these players. However, there appears little attempt in tourism management literature for developing areas proposing frameworks or models for integrating local community inputs, which could assist tourism companies to evaluate and manage a tourism value chain in poor third-world countries. This article considers the usability of the (tourism) value-chain as an alternative to socio-economic development in Rwanda. The specific findings on a tourism value-chain, discussed in this article, are extracted from a questionnaire survey done in 2009 in Rubavu, one of Rwanda's destinations with a flourishing tourism sector, using questionnaires and secondary data.

Keywords: Economic development, pro-poor tourism, tourism, value-chain impacts, Rwanda.

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Introduction

Tourism is said to be the largest industry in the world based on various economic measures, including gross output, value added, capital-investment, employment, and tax contributions. A decade ago Gauci, [Gerosa and Mwalwanda \(2001\)](#) noted that tourism in Africa was in fact a relevant industry in the five best-performing African economies (African G5: Botswana, Mauritius, Morocco, South Africa and Tunisia) which have been able to sustain reforms and achieve structural diversification. For example, Mauritius and other islands along the Indian Ocean coast of Africa earn a good part of their GDP from tourism, which remains a busy contributor to Africa's development, both in terms of employment generation, contribution to Gross National Product, as well as to export earnings.

If this is true for many African countries, it is difficult to explain why there are imbalances between countries and regions when it comes to tourism activities. The United Nations World Tourism Organisation (UNWTO, 2012) reported that the tourism industry in Africa had reached 27.6 million arrivals and receipts of US\$10.7 billion in 2000. This industry has grown to 53 million arrivals and receipts of US\$ 34 billion in 2012, yet its potential to contribute to the economic development of Africa in terms of poverty reduction and improvement of living standards remains largely underdeveloped, misunderstood and ignored.

Despite these promising statistics a number of factors have undermined tourism development in many African countries, including poor infrastructure such as roads, electricity and water supplies, insufficient accommodation, unsatisfactory public health services, poor telecommunication facilities and, in some instances, security problems. Furthermore, delays in applying efficient management systems and the persistence of practices that impeded competitiveness, have also contributed to slow development of the African tourism industry; this is particularly evident in the pricing of tourism services. Another serious weakness is the lack of a business environment able to set up a financial system suitable for the special needs of small and medium-sized tourism businesses in Africa.

Some of the reasons why tourism in Africa is not as developed as would be expected could also be found in the structural constraints and institutional weaknesses that impinge on the continent's growth. In a paper presented by the United Nations Economic and Social Council's Economic Commission for Africa (UNECA, 2013) income, institutions, the political environment and human capital have been identified among the critical contributors to Africa's development to help the continent to achieve specific development goals, including poverty reduction, social development, real per-capita income growth, health improvement, equity distribution of resources, and political stability. To accomplish these objectives on the economic side, Africa needs to sustain annual growth rates in excess of at least 5.5% against the figure that was projected in any previous year (Lopes, 2012). Fostering private sector development as the principal engine of growth is one of the main challenges for the years ahead: it will take time before Africa could reach international standards to compete on world markets.

A major negative factor impinging on tourism growth on the continent is certainly the political and social instability common to several African states. These countries would have to give serious attention to these problems, and develop strategies oriented to improving safety, security and public health, while at the same time using the most effective promotional tools to enhance their image in generating markets, especially from Europe, Asia and North America. Africa is often seen as a region troubled by violence and armed conflicts. Regional conflicts that sporadically break out, and insecurity issues in some

countries, are also affecting nations that are not directly involved. Many destinations are thus caught up in this negative perception; the political unrest in Zimbabwe does have an effect on the Southern African Development Community for example. The promotional activities launched to counteract these situations are extremely important in order to convey a positive portrayal of the situation at all times, gaining credibility and confining problems to their real dimensions.

The concept of a value-chain

A value-chain is a sequence of a target-oriented combination of production factors that create a marketable product or service from its conception to the final consumption thereof (Herr, 2007). According to Tanburn (2007), the value-chain is understood as both an analytical and operational model that assumes the fact that a product is rarely directly consumed at the place of production. It is usually transformed, combined with other products, transported, packaged and displayed until it reaches the final consumer. In this process the raw materials, intermediate products and final products are owned by various actors who are linked by trade and services, and each adds value to the product.

The concept of a value-chain is not new. Kaplinsky and Morris (2001) state that a value-chain describes the full range of activities which are required to bring a product or service from conception through different phases of production (involving a combination of physical transformation and the input of the services of various producers) and delivery to final consumers, while final disposal after use is then added to make it a closed chain. Environmental effects are also included in this chain. The United Nations World Tourism Organisation (UNWTO, 2002) claims that the tourism value-chain is a continuum of related economic activities which are associated with visitors and which could be carried out at least in part within a region. More than 12 years ago Kaplinsky (1999), and Kaplinsky and Morris (2001), promoted the idea of the value-chain being quite intuitive. Furthermore, a value-chain exists when all stakeholders in a chain operate in a way which maximises the generation of value along the chain. This definition could be interpreted in a narrow or broad sense, and is very relevant for pro-poor tourism in Rwanda.

In the narrow sense a value-chain includes a range of activities that are performed within a firm to produce a certain output. This includes the conception and design, the process of acquisition of input, production, marketing and distribution activities, and the performance of after-sale services. All these activities constitute the 'chain', which links producers to consumers, while each activity adds 'value' to the final product.

For agri-business enterprises, an appropriate system of storing fresh raw materials (such as fruits) impacts positively on the quality of the final product and, consequently, increases its value. A broad approach to the value-chain considers the complex range of activities which are implemented by various actors (primary producers, processors, traders, service providers) from the raw material stage to the retail of the final product. The broad value-chain begins with the production of the raw materials and will move along linkages with other enterprises that are engaged in trading, assembling, and processing (Kaplinsky & Morris, 2001).

It is essential to understand that conducting a value-chain analysis requires a thorough knowledge of what is happening between actors in a chain; what keeps these actors together, what information is shared, and how the relationship among actors evolves (Kaplinsky & Morris, 2001). In addition, the idea of a value-chain is associated with the concept of governance, which is of key importance for researchers who are interested in social or environmental facets of a value-chain analysis. The establishment or evolution of value-chains could create pressure on natural resources (such as water and land), which could lead to degradation of the soil, loss of biodiversity or pollution. Additionally, the development of a value-chain might affect social ties and traditional norms because power relationships within households or communities are modified, or because the vulnerable or poorest population groups are negatively affected by the operation of the participants in a value-chain (Kaplinsky & Morris, 2001). This is because agricultural value-chains crucially depend on the utilisation of environmental resources. Also, the agricultural sector is often characterised by the prevalence of traditional social norms. Finally, owing to the high incidence of the poor in agricultural sectors, the value-chain framework concerns are relevant for agricultural value-chains because they could be used to draw conclusions regarding participation of the poor, and the potential impact of value-chain development on poverty reduction in any African country, specifically Rwanda.

Herr (2007), notes that value-chains are a way of representing a series of transactions, from the provision of inputs for a primary product, to primary production, transformation, and marketing, to final consumption and subsequent recycling. In addition to being a way of representing a sequence of productive processes, value-chains could also be a tool to describe inter-relationships between a range of functional activities, service providers, customers, supporting institutions and supply chains. For instance the Netherlands Development Organisation (SVN) used value-chain development in Rwanda as a way to analyse how to improve participation and inclusion of marginalised peoples in the economy.

The tourism value-chain identifies a sequence of multiple and complex products and services across sectors that are delivered to tourists. This helped SNV to pinpoint market-based solutions to improve opportunities and earnings for the poor; for example, local fruit and vegetable farmers could be linked to an international hotel chain, and handicraft producers helped to improve their design and sales-share. Value-chains are a way of representing the series of transactions involved in providing goods or services, starting with the provision of input for production, and going through production, transformation, marketing to final consumption and subsequent recycling (Ashley, 2007a). This author also explains that in terms of tourism and poverty, one should not only focus on specific products that are currently produced by the poor (such as cultural village tours), but also take into account the overall sector, like the linkages between players, the different places where the poor function, to which markets they are catering, what revenue flows down to them, and on what their earnings depend. Understanding this helped to identify how best to enhance performance of the 'value-chain' (for the tourism sectors) so that it promotes the poor.

The outcome of this is that poor participants are more productive and earn more, and/or that more people are able to enter the chain and earn income from tourism. The means of doing this may be varied:

- It could mean working directly with poor producers to help them upgrade their products and better match the demand.
- Working with hotels, tour operators, and ground-handlers on their demand, procurement systems and pricing, so that they could work more effectively with poor entrepreneurs.
- Working with local- or national governments on regulations and business conditions to remove constraints for micro entrepreneurs.
- Engaging with tourists and tourism marketers so as to influence tourism behaviour and spending patterns, and
- Working with many different stakeholders in the tourism value-chain in order to obtain communications and commercial linkages that work more efficiently (Ashley, 2007a).

The shift to a value-chain approach among many international practitioners comes partly from the need to scale up the impact on poverty beyond a few high-input local projects, and from recognition that a major focus should be on helping the poor to access international markets. SNV had adopted a value chain approach to a number of productive sectors, including tourism in Rwanda (Ashley, 2007a). In the researcher's opinion the adoption of this approach as a

mapping tool (a way to picture the sector) is not enough. Though it means redefining the aim of intervention in order to make the value-chain work better for the poor, consideration of perceptions of local communities should not be ignored because there is a catalytic factor for strong planning and development of the tourism sector for pro-poor benefits. It is, therefore, logical that the argument of Ashley (2007a) has two immediate implications.

The first is that a good *understanding* of the current value-chain is needed, both to act as a diagnosis (to determine what to do) and as a baseline (for measuring future impacts). The second is that all *options* are open. In this regard the researchers support the statement by Ashley and Mitchell (2008:6) that there was ‘no prior assumption that a certain kind of tourism intervention is best for the poor’, thus the interventions may be at any point in the chain, in any sub-chain, and with any stakeholders, including accommodation sector perceptions if it increases access and returns for the poor. Based then on the modern interpretation of a value-chain approach, the researchers believe that the value-chain is a process through which the tourism product/service was produced, processed, advertised, and sold to a tourist, who is the final consumer.

According to Buijtendijk (2009), a value-chain is an economic representation of a particular social reality. It is a way to describe the range of transactions required to provide a service or a good, starting with production inputs, processing, distribution, marketing and sales, and recycling. Therefore, value-chain development is an approach that could enable the disadvantaged group to benefit from a certain economic activity. It also helps to shift income to disadvantaged peoples whereby the best practices of the concept request facilitating chain empowerment within, and for, community development.

Tourism value-chain (TVC) and supply chain

The tourism industry has been analysed holistically through distribution channel perspectives, as cited by authors such as Mill and Morrison (2002), Middleton and Clark 2001, Halloway (1998), and Laws (1997). Much in these quoted texts are issues of performance and measurement of value-chain in the tourism industry. Poon (1993) adapted Porter’s value-chain concept for the tourism industry, but did not mention the performance management of a value-chain. Another challenge in value-chain texts is that much of the literature does not look at the value-chain from the customer perspective; which means that there is a lack of a customer-oriented approach in the end-to-end value-chain. As a matter of fact, tourism product and service consumers see tourism products as seamless and required to be handled from a customer point-of-view so as to measure the tourism value-chain more effectively.

Even though great importance is placed on service, quality and customer satisfaction issues, and their link to the business performance in the tourism industry, it is unexpected to not see a customer-oriented approach in the tourism value-chain. The researchers of this article support the opinion raised by von Friedrichs Grangsjø (2003) that competitors can have both a competitive and a co-operative relationship with one another at the same time to achieve a national vision. That author's intention is not to challenge in a vacuum but to stress the importance of vertical and horizontal relationships between all players in the chain and final consumers in the tourism network. Since the tourism industry is multi-dimensional, the researchers tend to strongly agree with von Friedrichs Grangsjø (2003:427) when he states that 'the tourism product is produced in interaction with the customer and the customers have to be imported to the area of production, to the destination'.

Contemporarily, it is very important to note the characteristic of inseparability, how it makes businesses interdependent on each other and which affects the overall customer satisfaction and so future business. For this reason the investigation of the ways to manage and measure the tourism value-chain as a whole, with a customer-oriented approach, becomes very important. Another aspect of a tourism value-chain is the comprehensive understanding that the chain starts with a customer's order, from where transportation (airline, train, coach, car, ship) is organised between the home and the destination. Customers or tourists have some alternatives when they purchase a tourism product or service; they could either arrange their travel plans with the help of tour operators or outbound travel agents (package travel) planning them in a comfortable environment enjoying the professional advice on the whole holiday package, or arranging it themselves as individual travel, which allows them to be flexible in their travel experience.

Proceeding from the above arguments, the following seven ways could benefit the poor:

- Employment of the poor in tourism enterprises.
- Supply of goods and services to tourism enterprises by the poor or by enterprises employing the poor.
- Direct sales of goods and services to visitors by the poor (informal economy).
- Establishment and running of tourism enterprises by the poor - e.g. micro, small and medium sized enterprises (MSMEs), or community based enterprises (formal economy).
- Tax or levy on tourism income or profits with proceeds benefiting the poor.

- Voluntary giving/support by tourism enterprises and tourists, and
- Investment in infrastructure stimulated by tourism also benefitting the poor in the locality, directly or through support to other sectors (UNDP, 2011).

Although previously mentioned, it is surprising to learn that the poor do not consider themselves direct beneficiaries of the tourism industry. The following suggestions are outlined to enhance the tourism sector to work for the poor through the supply chain:

- Identifying tourism supply chains and establishing business linkages between the poor and the tourism market and enterprises, for instance, by supporting producers of vegetables or poultry products, sold to accommodation structures.
- Improving market intelligence on tourism supply chains so that the poor can understand the requirements, tastes and preferences of the tourism market (products, services, packages) better, and how to improve access to these markets.
- Identifying and linking sources of financing to support tourism investments in selected destinations in order to develop skills and strengthen supply chains to improve the quality standards of tourist products and services in destinations, so that it would be possible to attract more guests who will stay longer and spend more money.
- Facilitating meaningful dialogue between tourism investors, service providers and producers and government to enable effective public policy management, in the line through which local communities should be consulted as well, and
- Promoting multi-stakeholder platforms, bringing together relevant stakeholders, and developing public-private-partnerships for a holistic approach towards tourism destination management (UNDP, 2011).

Zhang, Song and Huang (2008:9) used Tapper and Font's definition (2004) that a tourism supply chain is a chain that '...comprises the suppliers of all the goods and services that go into the delivery of tourism products to consumers'. This definition has been supported by Spenceley, Ashley and de Kock (2009). For them, the tourism supply-chain refers to service- and product providers within the sector, that could be input suppliers, producers, manufacturers, retailers and wholesalers. These authors argue that the objective of interventions on the tourism supply-chain was to enhance the positive impacts of tourism on poor people by:

- Removing barriers that prevent them entering the industry.
- Enhancing the terms on which they work, and
- Improving the knock-on effects that tourism operations have on surrounding communities (Spenceley et al., 2009).

Methodology

In this survey data were collected during a literature study, and by using a structured interview-schedule with close-ended questions (Hofstee, 2006). This questionnaire was developed using available literature regarding local accommodation establishment-perceptions of the tourism value-chain, and distributed to 101 owners and managers in the Rubavu accommodation sector. These responses were coded and analysed using the Software Package for Social Sciences (SPSS) version 20.

Data analysis

The salient results of the survey regarding the community perception of the socio-economic and political impacts of the implementation of a tourism value-chain, and analysed using the SPSS software (version 20) are summarised below:

- Cause inappropriate form of tourism such as sex tourism
- Strong community involvement in the build-up
- Number of members affiliated to the social and security's fund will increase
- Improve understanding the role of tourism among local people in the economy
- Strengthening partnerships with local suppliers
- Improve the country's image and commercial value.

Dixon (2009) asserted that sex tourism is the practice of commercial sexual exploitation. A question pertaining to whether the implementation of the tourism value-chain (TVC) could lead to sex tourism resulted in 82% of respondents believing the affirmative, while 92% of respondents felt that the TVC would have a positive impact on the pro-poor tourism benefits. The Rwandan Report on the Economic Development and Poverty Reduction Strategy (EDPRS, 2008-2012) includes planning to enhance the effective participation of youth in the local economy. Youth Friendly Centres (YFCs) at local government level would be a focal point for the provision of information, advice, counselling and

guidance to support the youth to enable them to access a wide range of services and opportunities that are available in the country. 92% believed that the youth should have access to such services. In answer to the question posed to determine whether respondents believed that the effective implementation of TVC could have an impact on their employee social fund security, 97% believed that there would be a positive impact.

The Rwandan EDPRS (2008-2012) aims at increasing the marketing of tourism in the country and forming regional and international links so that national pride and nation building could be boosted. A question asking whether respondents from the accommodation sector believed in showcasing tourism at provincial level resulted in 95% concurring, believing that the TVC would improve product- and service quality by local suppliers, and that the TVC would impact positively on quality- and service delivery in the area. Ashley (2007b) points out that there is a vital need for programme destination-level linkages, which should be piloted in one or two areas to build relations between established tourism and the local/informal economy. This would help every SME in Rwanda to be linked to the tourism sector, in the hope that this would develop enthusiasm between local communities and SMEs through effective partnerships to create long-term change. 96% of respondents agreed that the TVC would result in improved infrastructure (for example, roads and conference facilities, hospitals, schools) that would also benefit the community at large. Moreover, they had affirmed that the effective implementation of a TVC would strengthen partnerships with local suppliers and the accommodation sector. Ashley (2007b) asserts that the impact of tourism is variable but, for example, in the case of the Western Province of Rwanda, it was particularly worth considering whether tourism could stimulate enterprise development in rural areas by providing infrastructural development such as new roads, water, power, conference centres and schools at various tourism destinations.

Discussion

Essentially, what is needed is for the TVC to benefit all in the chain, including the poor and destitute, and that would require the cohesion and integration of all players. This could be done through the establishment of measurable, achievable, realistic, consistent, congruent and flexible objectives that have predetermined timeframes, and that have the buy-in of all participants. Although the study, conducted only in the Western Province of Rwanda, has revealed a number of issues pertaining to areas needing intervention, the researchers of this article have only concentrated on six important issues identified in the survey in terms of understanding the situation that requires urgent attention in order to close the gaps of service quality.

These are:

1. The formulation of an integrated strategic business plan, which would include a strategic marketing plan for the region. This would require the participation and joint action of both national and regional/local government. The strategy should include the following:
 - An environmental analysis of micro and macro markets and the tourism industry.
 - The formulation of a tourism vision for the area, a mission and core values (which should be customer-centric).
 - The setting of objectives (which should be specific, measurable, achievable, realistic, have a timeframe, be consistent, congruent, flexible and acceptable to all the players in the area).
 - Selecting appropriate generic- and grand strategies to achieve the objectives.
 - The implementation of the aforementioned strategies, and
 - The control of the strategies to ensure that standards are met (i.e. objectives are achieved).
2. The improvement of the infrastructure, facilities and capacity in an area to accommodate the needs of domestic, and especially, international tourists (sustainable facilities to support tourism).
3. The development of a long-term tourism vision for any Province of Rwanda so that interventions could be put into place to secure benefits for generations to come (sustainable tourism).
4. The provision of education, training and development programmes for local people so that they could develop the required skills and expertise to take advantage of tourism opportunities in a Province (sustainable income-earning skills development).
5. The encouragement of cross-selling and the creation of synergy between the various operators in the area. No one could live and succeed in isolation, and by cross-selling the products and services of others, all the entities will gain benefits (sustainable support).
6. The formulation of required techniques to increase the stay of people in the area when they visit a Province. This would increase the average spend-per-visitor, allow them to visit other vendors, and experience the wonders of the country and its people (sustainable marketing).

The researchers are aware, but remain convinced, that since the TVC and Pro-poor Tourism (PPT) are still new concepts in Rwanda, the requisite mechanisms should be put in place to empower local people to participate actively in the planning, effective implementing, and delivery of the TVC and PPT at all levels, from national to local (ODI & SNV, 2006). In achieving this, local people would become responsible for the success of tourism in Western Province of Rwanda.

In a plan developed by Schild and Katz (2004) for Mozambique, the authors assert that their research studies had shown that the importance of value-chain approaches were not new ideas in development co-operation. However, under the prevailing trends of regional integration, globalisation and the over-riding need to reduce poverty, the concept is being reinterpreted.

The value-chain discussion gained new actuality because it is thought that the approach could make important contributions to sustainable poverty reduction in rural areas, if small-holders produced high-value crops with good market potential.

Value-chain interventions require intensive interaction by stakeholders of different origins and legal forms (producers, private sector, government, NGOs). Successful participation in value-chains implies, for the smallholders, skills development, organisation (empowerment), quality awareness, access to markets, and to financial services and transport. Experience shows that economically successful value-chains could generate negative collateral impacts on an environment and food security. Value-chain interventions need to ensure that such risks are minimised or mitigated. The renewed importance of value-chains is illustrated by the fact that in practice they have been put as first-priority in rural development strategies in Latin America, and that major donors' focus on value-chains. The researchers believe that effective implementation of a value-chain approach in developing African countries, such as Rwanda and Mozambique, could address the gaps in service-industries, lack of social, economic and political perceptions, and integration of residents when designing policies, strategies and procedures.

Although it is difficult to predict future scenarios in relation to the uncertainty about drivers, trends and understanding of future implications for the value-chain and the inclusion of small-scale producers/service providers, the successful implementation of a strategy could set Rwanda on a path to increase the number of visitors to the country. For instance, the survey done by SNV in 2009 indicated that one of seven districts in the Western Province of Rwanda (Rubavu) could be on a path to attracting annual inflows of about 123,120 people (6% growth per year) between 2008 and 2013; it is projected that these visitors would spend about \$172m by 2013 and \$300m by 2020 in Rwanda (International Hospitality and Tourism Research Centre for SNV Rwanda, 2009). These inflows might seem ambitious, but will depend on the determination of the local government, the private sector and a facilitator to make it happen within the region (International Hospitality and Tourism Research Centre (IHTRC) for SNV, 2009).

It must be understood that the benefits expected from accommodation service providers are both direct and indirect, and represent the value-added to those

sectors that interact directly with tourists, such as hotels and tour operators, as well as an indirect impact that represents the benefit to suppliers in the direct sectors, such as the farmers who supply hotels. There is also the induced impact measures resulting from the tourism-generated wages spent in the economy (for example, the portion of wages of hotel employees spent on goods and services locally produced). Kasahun (2006) noted that tourism development in Rwanda may not have a generally substantial impact on reducing the level of poverty; the argument also being applicable to the Western Province of Rwanda, since the survey done by the researchers was generalised for the entire country.

Since the respondents in the study have a scant to in-depth understanding of the TVC and how it could benefit local communities in the tourism industry, especially the accommodation sector, it is relevant to recommend specific strategies to a developing country like Rwanda, and the interventions required to ensure that the poor would also benefit from the overall growth of the sector.

The findings in this study illustrate that the following benefits could be expected for the tourism industry of Rwanda:

- A community-focus on improving the standard of living in Rwanda, and in so doing also improve the situation for the poor and destitute.
- An improved attitude towards tourism, the benefits, and advantages of implementing the TVC.
- Newly developed infrastructures which would lead to better cohesion and integration among up- and downstream participants in the TVC.
- Diversified economic activities designed to generate additional income in the area.
- Donations to the local community from tourists and other visitors.
- Socio-economic development through job opportunities, taxes, levies, more investment in the area and foreign currencies.
- Improvement of the service quality in the area.
- Newly formed partnerships with local suppliers.
- Improvement of local community profiles, and
- Improved capacity to service the needs of tourists and visitors.

Conclusions

The results of the survey make it clear that respondents understand that Rwanda needs total socio-economic transformation through engaging local residents in such industries that offer huge opportunities for poor people to release themselves from poverty. Most respondents understand what TVC is, and why the tourism industry needs to be more dynamic in order to enable local communities to benefit from the industry. Something must, therefore, be done to implement a TVC approach; however, in order to make these benefits a reality, it is essential that the actors, supporters and influencers of the tourism value-chain in Rwanda formalise a steering committee as a structural platform through which the benefits and challenges of the TVC can be monitored, evaluated and reported on, from provincial to national level. Although these conclusions are based on the situation in one province of Rwanda, it is anticipated that a future picture would uncover peoples' business perceptions regarding the tourism value-chain, in believing that vertical and horizontal benefits would be obvious when developing countries adopt the inclusion of residents' perceptions when implementing value-chain approaches.

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