

VISION 21

TOURISM DEVELOPMENT IN
SEYCHELLES
2001-2010

The Vision

Tourism in Seychelles shall continue to be developed to the highest standards for the optimum social and economic benefit of the Seychellois people while maintaining a commitment to the protection and conservation of the natural environment and biodiversity.

Mission Statements

Over the next ten years

Tourism in the Seychelles will be expanded gradually, with facilities, services and infrastructure developed to a higher quality level and more activities provided for tourists.

Tourist markets will be broadened to include more nationalities and both general and special interest tourists, and access will be improved to reach more market areas.

∞

Expenditures per tourist day will be increased and there will be more value-added in the country, which will enhance economic benefits to the Seychelles.

∞

Tourism will be developed on a sustainable basis and not exceed carrying capacities, and the unique land and marine environment and cultural heritage of the Seychelles will continue being protected and conserved.

∞

Seychellois will continue being sensitised to the importance of

tourism and providing good service standards to tourists, and given opportunities to work in tourism at all levels.

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INTRODUCTION

1. VISION 21 is the product of an extensive process to develop a comprehensive master plan for tourism development in Seychelles for the period 2001-2010. The final document is based on a series of planning research reports on all aspects of the tourism sector, which were prepared by local specialists during 1997-1999. The preparation of these reports was a consultative process that involved the participation of all stakeholders from the public and private sectors. The World Tourism Organization subsequently provided assistance to prepare a summary plan document, based on the individual planning research reports and updated to late 1999, which was then re-drafted as VISION 21 during the latter part of 2000 and early 2001.
2. Tourism is and will continue to be an essential component of the economy of the Seychelles. VISION 21 is therefore a key component of the country's development strategy. Not only does tourism generate direct economic benefits, in terms of income, foreign exchange, employment and government revenues, it also serves as a catalyst to other economic activities, such as agriculture, fisheries, manufacturing and crafts. Additionally, tourism helps pay for development of infrastructure used by the entire Seychellois community, and it helps justify and pay for conservation of the natural environment and cultural heritage of the country.
3. VISION 21 presents a comprehensive guide for the development of tourism in Seychelles so that it generates substantially increased benefits to the country while still protecting the land and marine environment and Seychellois cultural heritage. The VISION covers the period 2001-2010. However, as planning is a flexible and continuous process, the VISION, and especially the action programme, will be updated as needed based on the continuous monitoring of tourism development and market trends.

EXECUTIVE SUMMARY

The travel and tourism industry is the world's largest and fastest growing industry, and for many countries is the major contributor to economic growth and an important employment generator. According to the World Tourism Organisation's long-term forecast '2020 Vision', tourism arrivals will rise from 663 million in 1999 to one billion in 2010, increasing to 1.6 billion by 2020. Tourism receipts are expected to increase from US\$ 455 billion in 1999 to US\$ 2 trillion in 2020. These projections represent sustained annual rates of growth of 4.1% and 6.7% respectively. The tourism industry also makes a significant contribution to the economies of the sub-Saharan African region, where arrivals are expected to increase from about 27 million in 2000 to 47 million in 2010 and to 77 million by the year 2020, with Southern and Eastern Africa expected to experience the fastest growth rates.

It is against this background of steady worldwide growth that the performance of the tourism industry in Seychelles must be measured. Until the 1980s and early 1990s, tourist arrivals increased steadily, from 47,280 in 1982 and reaching a peak of 130,955 in 1996. Since then arrivals declined gradually to 124,865 in 1999, before recovering to 130,046 in 2000. Compared to global and regional trends in tourist arrivals over the past 10 years, Seychelles performance has been inconsistent, with above average growth rates in 1990 and 1993, and significant negative growth rates in 1991 and 1994. Of particular concern are the negative growth rates recorded between 1997 and 1999 at a time of continued global and regional growth.

Despite the decline in arrivals since 1996, tourism remains the most important pillar of the Seychelles economy through direct and indirect contributions to the domestic economy (GDP), and through inflows of foreign currency (Balance of Payments), including tourism receipts and foreign direct investment. Receipts from tourism have increased steadily from SR 353 million in 1986, reaching about SR750 million in 1999. In 1999 tourism was calculated to contribute about 29% of total export or foreign exchange earnings of the country, approximately 5,000 direct jobs or about 17% of total employment and about 20% of the Gross Domestic Product. Even so, the actual contribution of tourism to the national economy is much more significant, since these statistics are based on conventional national accounting methods, which estimate only the direct contributions of tourism to the gross domestic product, and not the value added that is generated from the industry through indirect contributions.

In order to address and reverse the relatively poor performance of Seychelles' tourism industry over the past four years it is necessary to understand the underlying reasons. Part One of this document thus provides an evaluation of the current condition of the tourism industry in Seychelles, and identifies shortcomings that act as a constraint to growth. These include, most importantly, inconsistent product quality and service standards in some establishments, and poor value-for-money, which coincides with increased competition from other comparable destinations in the region and elsewhere that have aggressively promoted their tourism sectors, in many cases developing high quality tourist facilities and services. Also highlighted in Part One are the global trends towards a more discerning tourism market and the growth of niche markets, including demands for high levels of environmental quality and environmentally friendly facilities and services.

While Seychelles possesses many natural advantages as a tourism destination, the increasingly competitive nature of the international travel and tourism industry makes it essential to address weaknesses and shortcomings in the industry with the aim of expanding and improving the range and quality of the tourism product in Seychelles. This requires a national effort to confront inadequate quality levels of some tourist facilities and services. It will also require the development of a greater diversity of attractions and activities, and the promotion of eco-tourism attractions related to the natural environment and national cultural heritage. Attention must also be paid to addressing existing shortages of qualified and well-trained personnel, and to retaining such personnel in the long term. Finally, the sustainability of tourism industry in Seychelles demands that particular attention is given to ensuring that the terrestrial and marine environment is well protected and not degraded by tourism or other types of development.

Part Two of Vision 21 identifies key areas that will require a coordinated national effort in order to re-position Seychelles as an exclusive and quality tourism destination and to set it apart from other destinations.

The overall aim is to increase tourist arrivals to approximately 180,000 by 2005, and to around 200,000 by 2010, and to increase expenditure per tourist-day substantially in order to generate more socio-economic benefits from tourism and stimulate other economic sectors. This will require improving and extending air access to more tourist market areas, with increased capacity and frequency of service consistent with future market demands. It will also require improved airport infrastructure to satisfy present and future needs.

In order to develop higher quality accommodation and services, attention will be given to upgrading of existing facilities and services where needed, and development of new facilities and services of higher quality levels, leading to a tourism product that is 'value for money' and consequent increased tourist satisfaction. In addition to the larger 4 and 5 star establishments, attention will also be given to encouraging the development of small and medium size accommodation establishments that are compatible with the local environmental character.

The quality of service will be enhanced with emphasis on improving the qualifications, motivation and productivity of Seychellois employed in the industry, and in the short-term facilitating, where necessary, the use of foreign labour, in order to improve the quality level of services as soon as possible.

Encouragement will be given to expanding the diversity of activities for tourists to the greatest possible extent, particularly activities based primarily on the natural environment and cultural heritage of the country. Particular attention will be given to promoting and developing specialised tourism, including eco-tourism and adventure tourism, with the aim of expanding tourist markets and encouraging environmental conservation and to provide an addition to existing conventional forms of tourism. This will include expanding diving, yachting and game fishing tourism, as well as the expansion of cruise ship tourism on a selective basis. At the same time, emphasis will be placed on the maintenance of Seychellois cultural values and traditions and a sense of cultural heritage, and on promoting local community involvement tourism in areas where tourism is being developed, and on maintaining positive linkages between tourism enterprises and nearby

communities. To this end, appropriate strategies will be applied to bring the benefits of tourism more directly to local villages and communities by providing opportunities to own and operate tourist facilities and services, and for qualified persons to work at all levels in tourism enterprises.

The sustainability of Seychelles' tourism industry is directly related to the health of the natural marine and terrestrial environment, which will be ensured by requiring that all expansion takes place within the framework of maintaining the ecological, social and economic sustainability of tourism, giving utmost consideration to continuing and expanding application of environmental protection measures to designated protected areas, and more generally to the environment, in order to maintain the overall environmental quality of the Seychelles. Environmental management will be viewed as a continuous process with both government and private enterprises sharing responsibility for conservation of natural resources and cultural heritage. The planning, development and management of tourism development will be undertaken in a way that avoids serious environmental impacts. Specific tourism projects will be carefully planned to take account of the carrying capacities of their respective sites. Tourism development will be environmentally integrated, suitably designed, and will stress the conservation of electric power and water supply. Appropriate waste management techniques will be applied.

Tourism investment, development and operation will be facilitated through the continued provision of appropriate incentives. Wherever necessary, regulatory mechanisms will be strictly applied to maintain high quality standards and to protect the environment and culture. Government taxation on tourism will not exceed levels that discourage investment in new facilities and services or the upgrading of existing facilities and services.

To promote human resource development, formal training of tourism personnel will be expanded and enhanced with the further development of the Seychelles Hotel and Tourism Training College (SHTTC) with improved facilities and faculty to offer both pre-service and in-service training, including training at the supervisory and management levels. Greater public awareness of the importance of the tourism industry will be achieved through continuation and expansion of the tourism awareness programmes, including the U-First Programme. This will include incorporating tourism in the school curriculum and presenting tourism as an attractive employment and career opportunity.

The implementation of Vision 21 will require a national tourism partnership, as both the government and private sector have responsibilities for the proper development and management of tourism. Close cooperation between these two parties and with relevant NGOs will be enhanced, based on the understanding that successful tourism can best be achieved through forming and maintaining an effective public-private partnership.

The marketing of Seychelles will continue to focus on creating an image of the country as a good quality destination with a beautiful and carefully protected environment, interesting cultural heritage and variety of activities for visitors, and will be selectively targeted to the desired market groups. Both primary and secondary markets as well as niche markets will be targeted.

Undoubtedly, the implementation of VISION 21 will be a major challenge to all concerned, and will require a strong national commitment and partnership. At the same time, the successful implementation of this vision for Seychelles' tourism will benefit not just the present generation, but also future generations.

PART 1

FORMULATING A NEW VISION

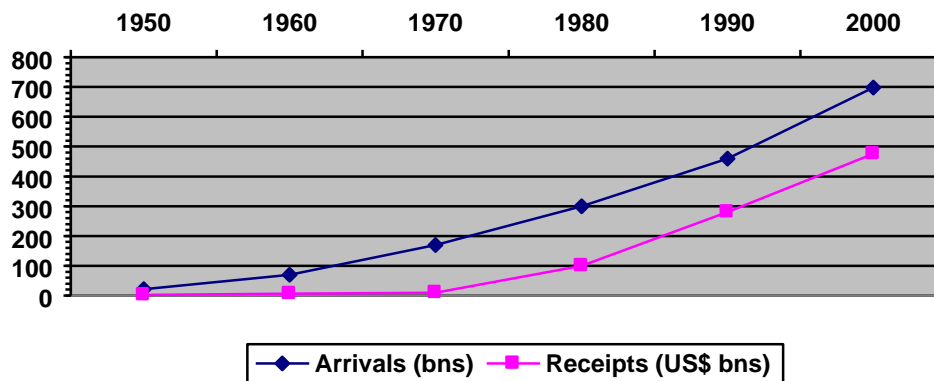
1. TOURISM – THE WORLD’S LARGEST INDUSTRY

1.1 The Global Context

The travel and tourism industry is widely regarded as the world’s largest and fastest growing industry. Globally, the industry has been expanding at an average annual rate of about 4-5% during the second half of the 20th century, and is projected to continue to grow at the same rate well into the new century. For many countries, tourism is the major contributor to economic growth and an important employment generator. It is also an industry with strong growth potential.

In 2000, there were about 698 million international tourist arrivals globally, which generated a total of US\$ 476 billion in receipts worldwide, and another US\$ 93 billion (1999 figure) in international fare receipts.

Figure 1
Growth of Global Tourist Arrivals and Tourism Receipts



According to estimates made by the World Travel and Tourism Council for 1999, the tourism industry was generating, directly and indirectly, across the global economy: -

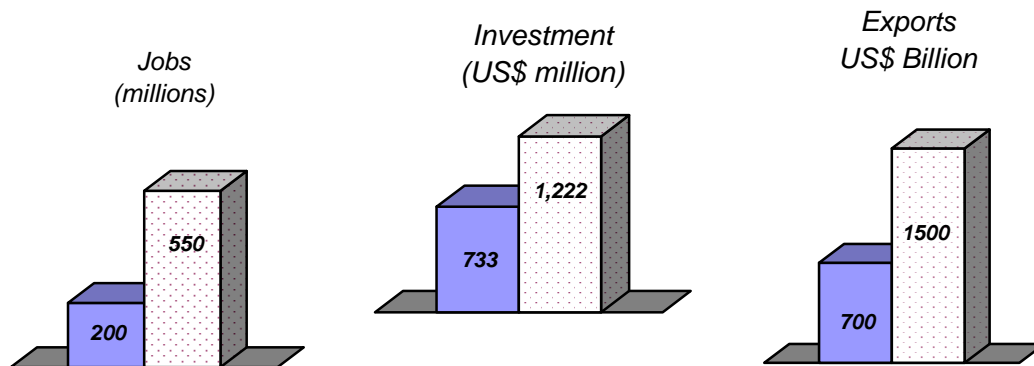
- **11.7% of GDP**
- **200 million jobs**
- **8% of total employment**
- **5.5 million new jobs per year**

In the same year travel and tourism was expected to generate around US\$ 3.5 trillion of GDP, with approximately one third coming from the industry itself and the remainder from catalytic flow-through effect in other sectors such as retail and construction. It was also estimated that tourism would generate investment in the region of US\$ 733 billion globally, or around 11.3% of total global investment. Tourism-related activities were

expected to account for nearly 11% of global employment. According to estimates by the World Tourism Organisation (WTO), by 2010 arrivals will reach one billion, increasing to 1.6 billion by 2020, when tourism receipts are expected to reach US\$ 2 trillion. These figures represent sustained annual rates of growth of 4.1% and 6.7% respectively.

The following figures show some indicators of the importance of the global tourism industry, and projected growth for the next 20 years, by which time tourism is expected to contribute to 12% of global GDP.

Figure 2
Growth of the Global Tourism Industry (1999-2010)



1.2 Tourism in Sub-Saharan Africa and the Indian Ocean

Despite Africa's small share of the global tourism market, the industry makes a significant contribution to the economies of the sub-Saharan African region, and this is expected to grow during the first 20 years of the 21st century.

International tourist arrivals to Africa as a whole grew at an average annual rate of 6.2% between 1990 and 1995, with above average increases recorded in the Southern African sub-region (24.2%) and Eastern Africa (10.8%). By contrast, Middle and Northern Africa experienced a decline in arrivals. Between 1995-1999, arrivals averaged 7.6% annually, reaching 9% in 1999. Although arrivals in Africa increased by just 1.5% in 2000, these are still significant statistics, in view of global annual growth rate of 5.1% (1985-95) and 3.7% (1995-1999). According to the World Tourism Organisation, arrivals in Africa will continue to increase at an average annual rate of 5.5% per year between 2000 and 2020, with the Southern African and Eastern African sub-region expected to lead the way with annual growth rates of 7.5% and 5.2% respectively. Africa's share of global tourist arrivals will rise from 3.6% in 1995 to 5.0% by 2020.

The World Tourism Organisation (WTO) estimates that international tourist arrivals to Sub-Saharan Africa, including the Indian Ocean, will increase from about 27 million in 2000 to 47 million in 2010 and to 77 million by the year 2020, and that Southern and Eastern Africa (which includes Seychelles) will experience the fastest growth rates.

Table 1
Africa: Forecast Trends in Tourism

	Actual			Forecasts		
	1985	1990	2000	2000	2010	2020
Arrivals (millions)						
Global Total	327.1	457.2	565.4	667.7	1,006.4	1,561.1
Africa	9.7	15.0	20.2	27.4	47.0	77.3
Market Share (%)						
Global Total	100	100	100	100	100	100
Africa	3.0	3.3	3.6	4.1	4.7	5.0
	Actual		Forecast	Forecasts		
	1985-90	1990-95	1995-2000	1995-2000	2000-2010	2010-2020
Average Annual Growth Rate (%)						
Global Total	6.9	4.3	4.1	3.4	4.2	4.5
Africa	9.0	6.1	5.5	6.3	5.6	5.1

Source : World Tourism Organisation (WTO)

Although any form of international travel will continue to be beyond the means of the vast majority of the population, there will also be significant growth in intra-regional travel, forecasted at 6.0% annually between 1995-2020. This will have the effect of increasing the intra-regional share of arrivals from 57 % to 65% over the same period. By 2020, intra-regional travel within Africa will account for the largest number of arrivals (50 million), with Southern and Eastern Africa showing the strongest growth rates.

In 1995, intra-regional and European arrivals accounted for up to 90% of international arrivals in Africa. It is projected that while intra-regional arrivals will increase, arrivals from Europe will fall from 33% of the total in 1995, to 25.3% in 2020. The strongest growth in international tourist arrivals to Africa is expected to come from the East Asian and Pacific regions (6.8%), followed by arrivals from the Americas (5.1%) and from Europe (4.4%). Overall, despite a slower rate of increase, arrivals from Europe will continue to account for most arrivals in the region, reaching 20 million in 2020. The strongest growth will be from Eastern Europe.

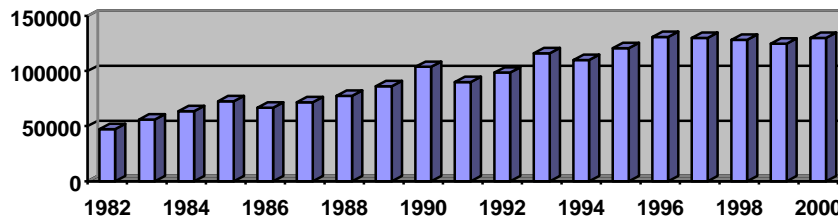
Seychelles therefore has an opportunity to position itself to participate in the projected growth in international tourism to the sub-Saharan region.

2. SEYCHELLES' TOURISM INDUSTRY

2.1 Trends in Visitor Arrivals

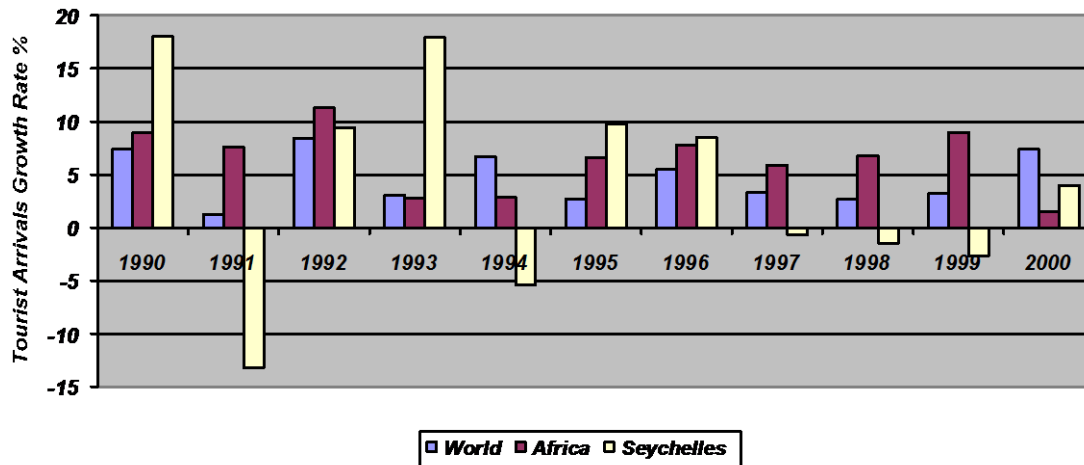
It is against this background of steady worldwide growth that the performance of the tourism industry in Seychelles must be measured. Until the 1980s and early 1990s, tourist arrivals increased steadily, from 47,280 in 1982 and reaching a peak of 130,955 in 1996. Since then arrivals declined gradually to 124,865 in 1999, before increasing to 130,046 in 2000.

Figure 3
Tourist Arrivals 1980-1999



Compared to global and regional trends in tourist arrivals over the past 10 years, Seychelles performance has been inconsistent, with above average growth rates in 1990 and 1993, and significant negative growth rates in 1991 and 1994. Of particular concern are the negative growth rates recorded between 1997 and 1999 at a time of continued global and regional growth. In 2000, Seychelles' performance improved with a growth rate of 4% over the previous year, compared with growth rates of 7.4% and 1.5% for the World and Africa, respectively.

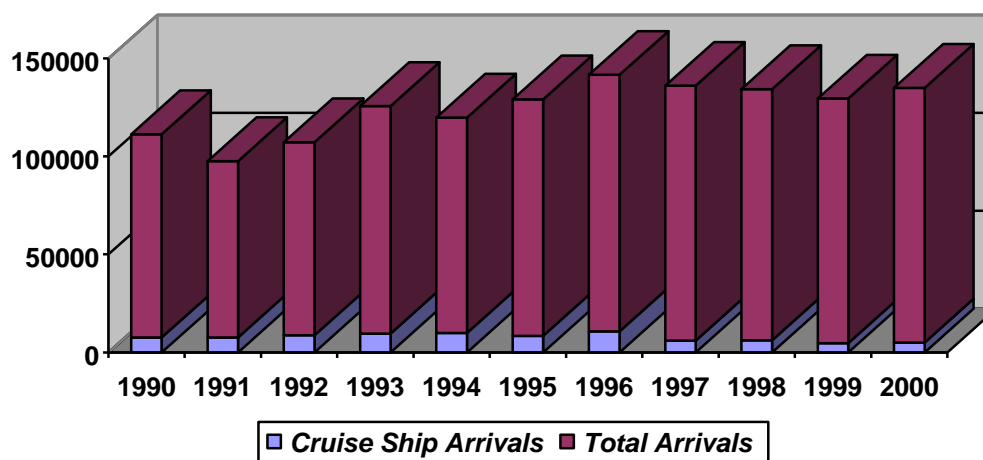
Figure 4
Seychelles' Performance in Comparison to Global Trends



2.2 Cruise Ship Tourism

Cruise ship tourism is currently a minor segment of the tourism industry in Seychelles. Over the past 10 years, trends in cruise ship arrivals have generally mirrored those for total arrivals, with steady growth from 1990 to 1996, followed by a period of sharp decline from 1996 to 1999. Overall, cruise ship arrivals generally accounted for between 7-8% of total arrivals from 1990-1996. Since 1997 cruise ship arrivals have accounted for less than 5% of total arrivals.

Figure 5
Visitor and Cruise Ship Arrivals 1990-2000



2.3 Domestic Tourism

Globally, domestic tourism is estimated to be about ten times larger than international tourism, and is projected to expand rapidly in many countries as citizens become more affluent and have more leisure time and disposable income. In Seychelles, domestic tourism is estimated to be less significant. It is nevertheless an important factor, particularly for many smaller hotel establishments, as is illustrated by overnight stay in hotels and similar establishments by domestic tourists, which increased from 7,000 nights in 1995 to 11,000 nights in 1999. In terms of overall tourism activity, domestic tourism is estimated to account for around 5% of the total.

3. THE CONTRIBUTION OF TOURISM TO THE NATIONAL ECONOMY

Despite the levelling off of arrivals over the past 5 years, tourism remains the most important pillar of the Seychelles economy through direct and indirect contributions to the domestic economy (GDP), and through inflows of foreign currency (Balance of Payments), including tourism receipts and foreign direct investment.

According to the Management Information Systems Division (MISD) and Central Bank of Seychelles exchange record, based on receipts from banks and hotels, tourism income increased from SR 330.9 million in 1980, to SR 645.5 million in 1990, and then declined to SR 600 million in 2000. During the same period, the average per diem expenditure by tourists fluctuated considerably, as is shown in the following table.

Table 2
Tourism Income (1)

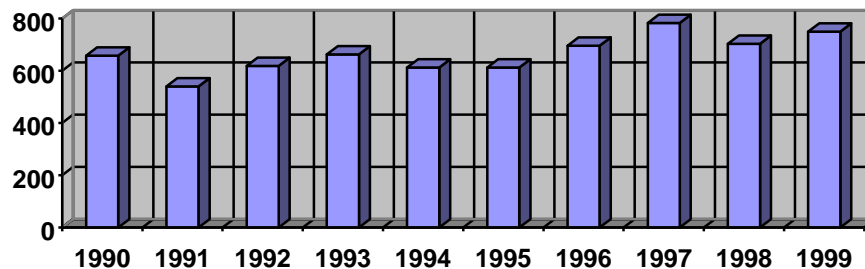
	No. of visitor arrivals	Average length of stay (nights)	Visitor nights ('000)	Hotel bed occupancy rate (%)	Income from tourism (2) (R million)	Average expenditure per diem per visitor (rupees)
1980	71,762	9.0	646	56	330.9	512
1981	60,425	9.6	580	48	289.1	498
1982	47,280	9.7	459	37	221.6	485
1983	55,867	10.7	598	48	233.0	390
1984	63,417	10.8	685	55	282.6	413
1985	72,542	11.0	798	62	335.7	421
1986	66,782	11.7	781	64	346.8	444
1987	71,626	11.4	817	66	379.6	465
1988	77,401	11.0	851	63	439.6	516
1989	86,093	10.7	921	61	521.8	566
1990	103,770	10.1	1,048	67	645.5	616
1991	90,050	10.5	946	56	525.8	556
1992	98,547	10.2	1,005	55	599.5	596
1993	116,180	9.6	1,115	58	607.4	545
1994	109,901	10.1	1,110	54	510.0	459
1995	120,716	9.5	1,146	53	466.3	407
1996	130,955	9.7	1,270	57	524.5	413
1997	130,070	10.3	1,340	56	612.5	457
1998	128,258	10.5	1,347	53	583.8	434
1999	124,865	10.4	1,299	53	596.2	460
2000	130,046	10.4	1,352	52	600.0	445

- (1) Figures may not necessarily correspond to MISD figures due to rounding down.
(2) These are purchases of foreign exchange

Source: Central Bank of Seychelles (CBS)

These statistics do not however provide a true account of total tourism earnings. This is partly explained by the appearance and growth of the parallel market, particularly over the past 5 years. Thus, according to Central Bank statistics on trade in services, tourism earnings have increased steadily from SR 353 million in 1986, to SR 663 million in 1993, reaching about SR 750 million in 1999. These figures take account of the tourism expenditure surveys conducted by the Management Systems Information Division (MISD). Based on these figures, the average per diem expenditure per visitor was about SR 580 (US\$ 105) in 1999, as opposed to SR 460 (US\$ 83).

Figure 6 :Tourism Earnings 1990 to 1999 (in Millions Seychelles Rupees)



Source: Central Bank of Seychelles (CBS)

Although tourism arrivals in 1999 declined by about 3% over the previous year, tourism was calculated to contribute about 29% of total export or foreign exchange earnings of the country, approximately 5,000 direct jobs or about 17% of total employment, and about 20% of the Gross Domestic Product, including direct and indirect contributions. Throughout the 1990s, the amount of government revenues generated by the direct and secondary impact of tourism is estimated to be some 40% of total expenditures.

The actual size and overall contribution of tourism to the national economy is however much more significant, since all the statistics referred to above are based on conventional national accounting, which is a way of estimating the direct contributions of any economic activity to the level of income generated (GDP). This is illustrated in the following tables.

Table 3 : 1999 GDP by Broad Productive Sectors

	Rm	%
Agriculture, forestry and fishing	99.8	3.2
Industries	909.9	28.8
Tourism	401.5	12.7
Government	434.0	13.8
Other services	1,310.2	41.5
GDP at current market prices	3,155.4	100

Source : Central Bank of Seychelles

Table 4: 1999 Contribution to GDP by the Tourism Sector

	Rm
Handicrafts	21.3
Air transportation	5.3
Tour operators	29.4
Hotels, restaurants	257.8
Road transportation (passengers)	31.9
Communications and storage	40.8
Recreation	15.0
Total	401.5

Source : Central Bank of Seychelles

The problem with the above tables is that they do not take account of all the value added that is generated from the industry, namely the indirect contributions. As outlined by the accounting concept of Tourism Satellite Accounts (TSA), in the same way as the visitor is at the centre of tourism activity, the consumption of the visitor is also at the centre of the economic measurement of tourism. The visitor is viewed as a particular type of consumption unit, which is only distinguished from other households by the fact that he/she is outside his/her usual environment. Therefore, according to this concept of TSA, tourism consumption includes all acquisition of goods and services by or on behalf of a visitor during his/her trip and stay at a destination. The total consumption by the visitor should therefore be captured in Table 3 above to reflect the true income generated by the industry.

The same argument can be used when looking at the importance of tourism in the generation of foreign currency receipts, which is captured in the Balance of Payments (BOP). The industry's contribution is identified through the direct inflow of hard

currency as an export industry under the Services Account. The sector also generates significant foreign exchange inflows through foreign direct investment, particularly in the construction of new hotels and other facilities. However, the contribution of tourism to total foreign direct investment is not specified. This is illustrated in the following Table 5.

Table 5: The Services Account and the Direct Investment Account of the BOP (Rm)

	1996	1997	1998	1999
Services Account	696.0	783.0	703.0	750.0
Tourism Earnings				
Direct Investment Account	190.9	268.4	280.0	295.0
In Seychelles				

Source : Central Bank of Seychelles

In addition to the direct contribution of tourism in generating income in the economy and foreign exchange earnings, there are other indirect contributions, such as through the transfer of knowledge and skills, particularly with five-star establishments, and the generation of employment. The direct and indirect contributions of tourism mean that there is a complete web of multiplier effects coming from the industry to the rest of the economy

To remedy shortcomings in accurately calculating the contribution of tourism to GDP, many countries are now adopting *Tourism Satellite Accounts (TSA)*, to provide a more reliable, comprehensive and accurate set of indicators to determine the true size and economic importance of tourism, based on a detailed analysis of all components of the demand of goods and services associated with tourism within the economy.

While this approach has the advantage of using existing economic data to evaluate more accurately the contribution of tourism to the national economy, the drawback is that the information necessary to extract tourism activity from national economic accounts is often lacking. Nevertheless, in order to enhance the comprehensiveness of data pertaining to the tourism industry, the Ministry of Tourism and Transport is currently working together with the Management Information Systems Division (MISD) and the Central Bank of Seychelles (CBS) to prepare a project proposal for the implementation of a system to develop national Satellite Tourism Accounts.

4. EVALUATING SEYCHELLES' TOURISM INDUSTRY

In order to address and reverse the relatively poor performance of Seychelles' tourism industry over the past four years it is necessary to understand the underlying reasons. This requires a thorough evaluation of the current condition of the tourism industry in Seychelles, with the objective of identifying and responding to shortcomings in the industry that act as constraints to growth.

4.1 Major Markets

The tourism industry is heavily dependent on the European market, which accounts for almost 80% of tourist arrivals coming by air to Seychelles. The major market countries are France, the United Kingdom, Italy and Germany, with Switzerland and the Scandinavian countries also being important. Other European countries provide some

tourists to the Seychelles, including the former Eastern bloc countries. Africa contributes about 10% of the arrivals, with South Africa, Reunion and Mauritius being the major market countries from this region. The Americas and Asia (including the Middle East) each provide about 4% of arrivals. About 74% of the tourists visited Mahé and of those who visited other islands, about 66% went to Praslin and 57% to La Digue.

Table 6 : Visitor Arrivals by Region (000s) : 1995-2000

	1995	1996	1997	1998	1999	2000
Europe	92.9	99.00	102.3	102.3	101.0	104.2
Africa	14.3	13.3	14.0	12.7	14.2	13.8
Asia	6.4	11.3	6.4	5.7	5.0	5.4
Americas	6.3	6.7	6.7	6.8	4.1	6.2
Oceania	0.9	0.7	0.7	0.7	0.5	0.5
Total	120.7	130.9	130.1	128.3	124.9	130.0

Source : Management Information Systems Division

The average length of stay of tourists has been about ten days since the early 1970s and was 10.4 days in 2000. There is some seasonality of tourist arrivals with October through April being the peak arrival months and May through July and September being the lower arrival months. Currently, around 90% of arrivals come for the purpose of holiday and combination business/holiday, and the remainder for business purposes or in transit.

While Western Europe will continue to be Seychelles' major market, there is clearly a need to diversify markets. In particular, efforts should be made at capturing a share of non-traditional markets, such as the USA, and emerging markets, particularly in Eastern Europe and Asia.

4.2 Air Access

4.2.1 Existing Air Links

The overwhelming majority of tourists reach Seychelles by air, and the availability of regular direct flights between Seychelles and its major tourism markets is therefore an essential precondition for the further expansion of tourism.

The country is currently served by several international airlines, with Air Seychelles in the year 2000 handling about 70% of total traffic, with British Airways handling about 10%, and the remainder shared by other airlines (Air Mauritius, Condor, Kenya Airways, Air Austral, Aeroflot, and Inter Air). Regular direct flights operate to the major European markets of France, Germany, Italy and the UK. Although some of the major Western European markets are currently adequately served, access from some lesser and potential markets (including Scandinavia and Eastern Europe respectively) is inconvenient and limited.

Air Seychelles also provides a domestic air service to Praslin, and a number of other islands, while the Island Development Company (IDC) operates some of the country's domestic air links to the outer islands. The only private domestic airline is Helicopter Seychelles, which operates helicopter services to a number of islands, including Praslin, La Digue and Silhouette.

In 2000, there were 2,242 international scheduled flight movements handling 319,224 passengers. In the same year 289,391 domestic passengers were handled.

Table 7
Arrivals / Departures at Seychelles International Airport (by Airline) : 2000

Airline	Passengers				Flight Movements
	Arrivals	Departures	Transit	Total	
Air Seychelles	116,591	116,511	0	233,102	1377
British Airways	15,629	16,043	0	31,672	208
Condor	9,163	9,241	4,221	22,625	138
Kenya Airways	7,945	7,960	0	15,905	226
Aeroflot	5,308	5,199	0	10,507	191
Air Austral	1,872	2,254	0	4,126	70
Inter Air	684	603	0	1,287	32
TOTAL	157,192	157,811	4,221	319,224	2,242

Source: Directorate of Civil Aviation

There are plans to construct a new International Airport Terminal to replace the existing one, which was opened in 1971. Praslin airport new terminal was officially opened on 23rd June 2001, while another 13 domestic airstrips on the Outer Islands are also being developed and maintained to good standards.

4.2.2 Air Transport Policy

The formulation and implementation of an air transport policy that is responsive to the needs of the tourism industry is of critical importance. This responsibility rests with the Directorate of Civil Aviation (DCA) of the Ministry of Tourism and Transport whose mission covers the regulation of air transport and ensuring that the air transport system supports the social and economic objectives of the government, as well as the management and development of Seychelles International Airport and Praslin airport.

The role of the DCA is complemented by Air Seychelles, whose primary role is to provide, maintain and complement air links with the major tourism markets of Seychelles in order to ensure continual accessibility and to sustain the Seychelles tourism industry, as well as to provide a domestic air service in support of the development of the other islands of the archipelago, and ground-handling services.

This respective mandates of the DCA and the national carrier, represents a challenge in the development of a national air transport policy, particularly in view of regional and international moves towards an “open skies” policy. Most importantly, an “open skies” policy may result in increased air traffic and other activities for the airport and its service providers, while encroaching on the market share held by the national carrier. Thus, while such a policy may arguably initially have a positive net benefit on tourist arrivals, with flow-on effects across the national economy, it may have negative impacts on the long-term viability of Air Seychelles. This is an important issue that must be continually reviewed.

4.3 Accommodation Establishments

The majority of the existing large hotels were initially developed during the 1970s and 1980s. Some of these establishments have undergone or are in the process of renovation

or reconstruction, while others no longer meet the expectations of discerning tourists. The evolution of this situation has coincided with increased competition from other destinations in the Indian Ocean, Southeast Asia and elsewhere that have aggressively promoted their tourism sectors, in many cases developing high quality tourist facilities and services. In response, during the past few years an emphasis has been placed on the development of five-star establishments in Seychelles. At the same time, all hotels and guesthouses have been encouraged to provide value-for-money by maintaining high standards regardless of category.

4.4 Capacity and Occupancy Rates

As of late 2000, there were a total of 2,713 accommodation rooms and 5,426 beds in Seychelles, distributed among the islands as shown in Table 8. Average annual hotel bed occupancy rates have been in the mid-50s percentage range during recent years. Hotels with about 2,062 beds have been approved for new development, and hotels with about 1,568 beds have been proposed and are awaiting approval. If implemented, this will raise the total bed capacity to around 8,900 beds.

Table 8¹
Capacity by Hotel Category (2000)

Island	Large Hotels ²		Small Hotels		Self-Catering		Total	
	Rooms	Beds	Rooms	Beds	Rooms	Beds	Rooms	Beds
Mahé	1,165	2,330	301	602	152	302	1618	3236
Praslin	444	888	231	462	71	142	746	1492
La Digue ³	60	120	150	300			210	420
Others	139	278	79	158			139	278
Total	1,808	3,616	761	1,522	223	444	2,713	5,426

Source: Ministry of Tourism & Transport

4.5 Employment Trends in the Tourism Sector

More than 5,000 people are currently directly employed in the tourism sector, and the number is expected to expand significantly over the next ten years. This expectation is based on the assumption that the quality of many existing accommodation establishments will be upgraded, and that new high quality establishments will be added to the stock. With the enhancement of product quality the ratio of employees to rooms will increase from the current ratio of approximately 1-1. In addition, the projected expansion of the number and range of complementary activities will also require additional personnel.

It is estimated that around 5,000 additional employees would be required by the industry over the next 10 years. This includes not only persons employed by accommodation establishments, but also by other tourism services.

This represents a great challenge since one of the major constraints facing the sector is an acute shortage of staff at all levels, from the lowest grade employees to supervisory and

¹ The number of beds is based on the assumption that each room has the equivalent of two beds

² Large hotels have 25 rooms or more and small hotels less than 25 rooms.

³ Figures for self-catering establishments included under small hotels.

senior management personnel. One of the main problems is the difficulty in attracting and retaining qualified Seychellois in many types of jobs, particularly in housekeeping, kitchen and food and beverage and service, as well as in supervisory and managerial positions in hotels and restaurants. Even where staffing numbers are met, the quality and motivational level of employees is often at variance with the demands of the industry.

As a result of these constraints the industry currently employs a relatively high number of expatriates, totaling over 400 in January 2000, dispersed over different levels. At the same time, there were 200 reported vacancies in the industry, representing a demand for local staff of over 600 persons in existing tourism establishments.

The Seychelles Hospitality and Tourism Training College (SHTTC) at La Misere is currently the main establishment for the training of personnel for the tourism industry. However, its capacity and facilities are now inadequate to meet the existing and future demands of the industry. Government has therefore approved plans for its expansion and further development.

4.6 Service Standards

The success of the tourism industry is more than ever dependent on being able to attain high levels of service standards throughout all sectors of the industry. Although much has been achieved in raising standards over the past thirty years, there is an urgent need to further upgrade service standards, in order to provide value for money and to meet the challenge of increased competition from other tourism destinations.

4.7 Attractions & Events

As the global tourism industry has expanded, clients are becoming more sophisticated and discerning, expecting good 'value for money' in their travels. Another important trend is that more tourists are wishing to participate in recreational and cultural activities. Many are also environmentally conscious, and wish to visit destinations that exhibit a high level of environmental quality and offer environmentally friendly facilities and services. Special interest tourism, such as eco-, cultural and adventure tourism, is also gaining in popularity, and destinations offering special interest features are attracting these emerging tourist markets.

While Seychelles does not possess the diversity and range of attractions offered by many larger countries, it already boasts a number of attractions and events that appeal to such demands. In particular, the country is well provided with marine-related attractions and activities, including organized excursions to marine parks, snorkelling, scuba diving and sports fishing, while the World Heritage sites of Vallee de Mai on Praslin and the Aldabra Atoll are unique attractions of international renown. The paths and nature trails of the granitic islands of Mahé, Praslin and La Digue offer visitors with numerous opportunities to explore the country's national parks and protected areas. Other island nature reserves, such as Aride, Bird, Curieuse, Cousine and Silhouette are further attractions for excursions. The increasing number of Outer Islands now offering hotel accommodation also provides a greater range of options for discerning tourists, which is likely to increase in the next few years.

There are a number of cultural festivals and other events held on an annual basis, of which the Creole Festival is the most significant. Other notable events include the Sub Indian Ocean Seychelles Water Festival (SUBIOS) and an annual Jazz Festival.

The capital city of Victoria has recently benefited from an extensive landscaping campaign, and offers visitors a number of attractions, including several museums, craft shops, duty-free shops and restaurants.

Another important national asset is the social harmony that exists throughout the archipelago. Guaranteed safety and security are prime considerations for all modern international travelers. The friendliness of the people, and the relative absence of crime, or social and ethnic conflict, is therefore an attraction for visitors. In addition, in contrast to other tropical destinations, Seychelles is not affected by extreme weather events such as cyclones, and is free of common tropical diseases, such as malaria. These are comparative advantages that add to the appeal of the islands.

5. CHALLENGES AND OPPORTUNITIES FOR EXPANDING TOURISM

5.1 Major Challenges

While Seychelles has many natural advantages as a tourism destination, the highly competitive character of the international travel and tourism industry makes it essential to identify weaknesses and shortcomings in the industry, and then to view these as challenges and opportunities to be addressed in order to achieve the goal of expanding and improving the range and quality of the tourism product in Seychelles.

The major challenges facing the industry have already been implicitly mentioned. The most fundamental of these challenges is the need to address the relative stagnation of tourist arrivals during the late 1990s, and the need to compete effectively with other destinations so that the tourism industry can continue to contribute to further social and economic development.

This will require a concerted effort to dispel a mixed international image, where although Seychelles is known as a desirable and quality tourist destination, it is also often perceived as providing limited 'value for money'. It will require confronting the inadequate quality level of some tourist facilities and services that do not meet expectations, particularly of higher spending tourists. The need to diversify the types of tourist markets, within the framework of maintaining good quality tourism is another important challenge.

The rather inconvenient and limited air access from some existing and potential tourist markets, and inadequate airport infrastructure, particularly for international arrivals, are other issues that must be given a high priority.

To compete effectively with an increasing number of destinations and for specialised niche markets, and also to increase yield, there is a need to provide a greater diversity of attractions and activities, and to promote eco-tourism attractions related to the natural environment and the national cultural heritage.

The current lack of qualified and well-trained personnel in many areas of the tourism industry, and the difficulty in recruiting and retaining qualified and motivated Seychellois personnel in several areas of tourism services, are issues that will require the particular attention, as is the need to ensure that the land and marine environment is well protected and not degraded by the expansion of tourism or other types of development.

Finally, there is an urgent need to comprehensively address the issues of safety and security for tourists, since although Seychelles remains one of the safest destinations in the world, any shortcomings in this area have the potential to jeopardise all the gains made in other areas.

5.2 And Opportunities

At the same time, it is clear that Seychelles possesses an array of opportunities for successfully addressing such challenges, including an existing network of resorts, hotels and other types of accommodation, and other relatively well developed tourist facilities and services. In addition, there are areas available that are ideal for the expansion of existing hotels and development of new hotels, and opportunities to upgrade existing facilities where needed, and various high quality hotels underway or proposed.

There are numerous possibilities for the development of activities and attractions for niche markets, particularly in the area of eco-tourism, on both the Inner and Outer Islands, based on the existing system of terrestrial and marine national parks and reserves including two World Heritage Sites. Likewise, there is already a relatively well developed arts, crafts and souvenir sector, that could be developed still further with the introduction of appropriate policies aimed at reducing costs of production.

Improvements in access will be greatly facilitated by the planned enhancement of the international and domestic fleets of Air Seychelles, while the new airport terminal on Praslin and the new international terminal planned for Mahé will be important additions to the infrastructure necessary for the expansion of the tourism industry. The relatively well-developed infrastructure of roads and telecommunications already provide a sound basis for the further development of the industry, as will the planned projects for augmenting water supply and improving waste management.

In the field of human resources, the planned expansion and further development of the Seychelles Hospitality and Tourism Training College (SHTTC) will go a long way towards addressing current staffing constraints in the industry, and will provide career opportunities for a significant number of Seychellois in the future.

Although the proposed expansion of the industry will inevitably have some impact on the natural environment, the implementation of the second-generation Environmental Management Plan for Seychelles (EMPS) 2000-2010 will provide a sound basis for future environmental sustainability upon which the tourism industry depends. However, although environmental policies and regulations are in place, improvements are needed in the area of enforcement.

While the safety and security of tourists has been identified as a major challenge facing the industry, the relatively low crime-rate, with very little major crime and no begging or

hassling of tourists by vendors and touts such as it occurs in some other tourist destinations, is a definite advantage.

Finally, Seychelles enjoys the advantage of having a healthy environment, particularly when compared to other tropical destinations, with no malaria, typhoid or other serious disease present, though there is a need for continued vigilance.

6. RESPONDING TO THE CHALLENGE

The continuing importance of tourism to the Seychelles' economy poses a great challenge, since given the country's small size and lack of resources there are limited alternative options for sustaining the social and economic progress achieved since independence in 1976. The past few years has shown that in the absence of a new approach, it will become increasingly difficult to achieve the desired rates of growth in visitor arrivals, particularly in the face of increased competition from other culturally and environmentally diverse countries in the Indian Ocean region, including Southern and Eastern Africa and South Asia.

At the same time, the extent of the projected growth in the international and regional tourism industry provides significant opportunities for a country so blessed with natural endowments. While Seychelles has already established a reputation as an exotic and exclusive destination, it is also clear that for the tourism industry to expand and contribute even more to national economic and social development, the sector must be revitalized in response to changing market trends and increased competition from other destinations.

Fortunately, Seychelles has much to offer with respect to a variety of outstanding attraction features and a strong environmental protection policy. Some existing hotels are of good quality, and planned hotels are of high quality standard. Other tourism facilities and services, and general infrastructure, are relatively well developed. The country already has a policy of controlled tourism development, and of attracting good quality tourist markets.

These positive aspects now need to be refined, and more proactive strategies adopted to achieve development objectives. This will require a new vision and approach based on maximising advantages and achievements, while addressing shortcomings. There is a need to devote attention to expanding and improving the quality level of the tourism product, and to increasing average yield per tourist to maximise direct economic benefits and to stimulate other economic sectors. Attention also needs to be given to ensuring the tourism industry is developed on a sustainable basis that conserves the natural environment of the Seychelles, and the cultural heritage of Seychellois people. There is considerable potential for the development of eco-tourism, and for local communities to participate in and benefit more directly from tourism.

PART 2

STRATEGIC DIRECTIONSTHE WAY FORWARD

Implementing Seychelles' VISION 21 for tourism will require coordinated national efforts in eight key areas: -

- 1) *Redefining Tourism* –and re-positioning Seychelles as an exclusive and quality tourism destination, and setting it apart from other destinations.
- 2) *Expanding Capacity and Increasing Yields* - taking account of carrying capacity and product quality.
- 3) *Enhancing the Tourism Product* – and ensuring value for money and overall visitor satisfaction.
- 4) *Promoting Eco-tourism and Community Benefits* – through the development of a wide range of nature-based attractions and activities
- 5) *Developing Human Resources* – by enhancing the quantity and quality of the industry's human resources and building a commitment to service.
- 6) *Integrating Tourism for Environmental Sustainability* - ensuring that tourism is a nationally integrated industry that takes account of environmental carrying capacity and sustainability.
- 7) *Working Together for Success* – and Implementing the Vision through the active partnership involving all stakeholders.
- 8) *Promoting the Vision*- by making Seychelles' tourism product a byword for exclusivity and quality.

1. RE-DEFINING TOURISM

VISION 21 aims to maintain and expand the tourism sector's contribution to the national economy, in a manner that is environmentally and socially sustainable. To achieve this objective, an increase in tourist arrivals must be accompanied by an increase in the daily expenditure of tourists (yield per tourist), based on the development of a higher quality tourism product. This will require higher quality hotels (both new and upgraded accommodation) and a diversification of tourist activities, which will result in tourists engaging in, and spending more money on activities.

Traditionally, the tourism product in Seychelles has been marketed primarily as a “sun, sand and sea” destination. This is no longer a viable marketing strategy, as Seychelles must increasingly compete with other tropical destinations offering a similar product combination, often at lower cost. It is therefore necessary to identify what makes Seychelles stand out from its competitors, and then put this across effectively in marketing strategies.

With this in mind, the Seychelles Tourism Marketing Authority (STMA) has identified purity as the key factor, and come up with the marketing slogan: “Seychelles, as pure as it gets”. The emphasis of the new marketing campaign is on illustrating to potential clients what makes Seychelles special in comparison with other destinations. “Purity” is thus a reference not only to the beauty of the islands' natural environment, but also to the essence of the Creole culture.

The challenge now is for the tourism industry in Seychelles to live up to the expectations generated by marketing campaigns associating the islands with purity. This will require a vision of purpose, and a national effort by all that depend directly or indirectly on the industry for their livelihoods. Throughout the industry, the emphasis must be on matching expectations with a quality product, good service and value for money. Equally, there is a need to conserve and protect the natural environment upon which the industry is built, and to preserve the cultural harmony of the Creole way of life.

To achieve our vision for the future of the tourism industry, it will not be enough to only entice tourists to visit our islands. Seychelles must also be in a position to attract the best and most serious investors to take a stake in Seychelles' tourism industry, be they local or foreign. This will require the provision of adequate infrastructure to meet the increasing needs of the industry, and the guarantee of a good and efficient business environment, with appropriate incentives for investors.

In redefining Seychelles tourism, VISION 21 puts forward a nationally integrated approach that is designed to ensure the long-term sustainability of the industry, and its continued contribution to the social and economic prosperity of the Seychellois people. It is an approach based on innovation and enterprise, and on a national partnership in which all stakeholders pull together for the benefit of each individual and the community as a whole.

2. EXPANDING CAPACITY AND INCREASING YIELDS

There are currently 2,713 rooms and 5,426 beds in operation (in late 2000). Based on this existing bed capacity, the maximum number of arrivals that could be accommodated (assuming the current average length of stay of approximately 10 nights) is 197,100 at 100% occupancy.

In addition, there are 2,062 beds in projects that have been approved and 1,568 beds in projects that are awaiting approval. Assuming that most of these projects are implemented, more than 3,500 beds could be added to the total accommodation stock during the next few years. Of this projected total of around 8,900 beds, approximately 63% would be located on Mahé, 23% on Praslin, 6% on La Digue and 8% on the other islands. These figures include both larger and smaller hotels. Based on a continued average of 10 nights stay, if all these projects are implemented and there is no loss of capacity due to closures, the maximum number of visitors that could be accommodated annually would be around 324,850 (at 100% occupancy).

However, experience has shown that it is highly unlikely that all these projects will be implemented.⁴ More importantly, such projections do not take account of the emphasis that Vision 21 places on the need to improve the overall quality of the accommodation stock, which is necessary in order to increase the average yield per tourist. Thus, it is expected that in addition to the development of new high quality accommodation projects, some existing hotels will inevitably have to be closed down or extensively redeveloped, in some cases at a reduced capacity.

Vision 21 therefore advocates a strategy of a gradual average annual net increase in bed capacity over the next 10 years. During the next 5 years, it is assumed that around half of the beds in approved and pending projects will be realized. It is also assumed that some existing establishments will either close down or operate with reduced capacity as a result of redevelopment / renovation. Under this scenario it is estimated that there will be an average annual net increase of 300 beds during the period 2001-2005. Subsequently, Vision 21 advocates a period of consolidation and further upgrading of quality standards, during which the average annual net increase in beds would be around 100. At the same time, it is estimated that the proportion of high quality “high yield” beds will increase from around 470 in 2000, to about 920 in 2005 and to 1,170 in 2010. The increase in the proportion of “high yield” beds will have a significant positive effect on average daily yield and total revenue, since according to estimates by the Ministry of Economic Planning, the yield from such beds was around US\$ 500 per day in 2000, compared to an estimated average of US\$ 95 per day for the remaining stock of beds.

Such a strategy would enable the objective of raising overall quality levels of accommodation to be achieved, while taking into account issues of environmental and social sustainability, including availability of human resources. At this rate of increase, bed capacity will expand as illustrated below, and will permit an increase in visitor arrivals to between 156,585 and 240,900 in 2005 and 168,447 and 259,150 in 2010,

⁴ Over the past 5 years, the average increase in room capacity has been around 50, despite the approval of a large number of projects.

based on 65% and 100% occupancy, respectively. This does not take account of visitors staying in unlicensed accommodation, including Seychellois and others visiting friends and those staying on live-aboard accommodation, which has been conservatively estimated at 15% of total visitors.

Table 9: Projected Tourism Development (2001-2010)

<i>Year</i>	<i>Total No. of Beds</i>	<i>Of which “high yield”</i>	<i>Arrivals (Capacity at 100% Occupancy)⁵</i>	<i>Arrivals (65% Occupancy)</i>
<i>2001</i>	<i>5400</i>	<i>570</i>	<i>197,100</i>	<i>128,115</i>
<i>2002</i>	<i>5700</i>	<i>670</i>	<i>208,050</i>	<i>135,232</i>
<i>2003</i>	<i>6000</i>	<i>770</i>	<i>219,000</i>	<i>142,350</i>
<i>2004</i>	<i>6300</i>	<i>845</i>	<i>229,950</i>	<i>149,467</i>
<i>2005</i>	<i>6600</i>	<i>920</i>	<i>240,900</i>	<i>156,585</i>
<i>2006</i>	<i>6700</i>	<i>970</i>	<i>244,550</i>	<i>158,957</i>
<i>2007</i>	<i>6800</i>	<i>1,020</i>	<i>248,200</i>	<i>161,330</i>
<i>2008</i>	<i>6900</i>	<i>1,070</i>	<i>251,850</i>	<i>163,702</i>
<i>2009</i>	<i>7000</i>	<i>1,120</i>	<i>255,500</i>	<i>166,075</i>
<i>2010</i>	<i>7100</i>	<i>1,170</i>	<i>259,150</i>	<i>168,447</i>

While a survey conducted in 1998 of suitable sites for beach-orientated hotels indicated additional capacity for the development of about 2,500 beds, such capacity should not be developed in the immediate future. Instead, attention should be given to redevelopment of existing hotel establishment in line with the policy to generally upgrade quality standards.

Although most approved and pending new accommodation projects are beach hotels, there is also need for a medium size business-oriented hotel in central Victoria, or in the new marina area near Victoria. Some “eco-lodges” may also be developed in or near the protected terrestrial areas, and a hotel d’application will be developed as part of the proposed re-development of the Seychelles Hotel and Tourism Training College (SHTTC). Other small hotels may be developed inland to take advantage of scenic views.

2.1 Carrying Capacity

Each proposed hotel and resort project will be carefully examined to ensure that such developments do not exceed the carrying capacity of each site, and that they adhere to appropriate site development standards and architectural, landscaping and engineering design. By the end of the plan period an assessment will be made to determine whether Seychelles can support additional tourism development, based on a thorough carrying capacity analysis and the experience with tourism during the 10-year plan period. This assessment will determine the capacities of each beach that is suitable for tourism development, excluding those beaches reserved for general public beach park use. The total of beach accommodation capacity could then be calculated for the entire country, taking account of the availability of adequate infrastructure, and the need to maintain environmental protection areas and avoid negative social impacts.

⁵ Based on average stay of 10 nights per visitor.

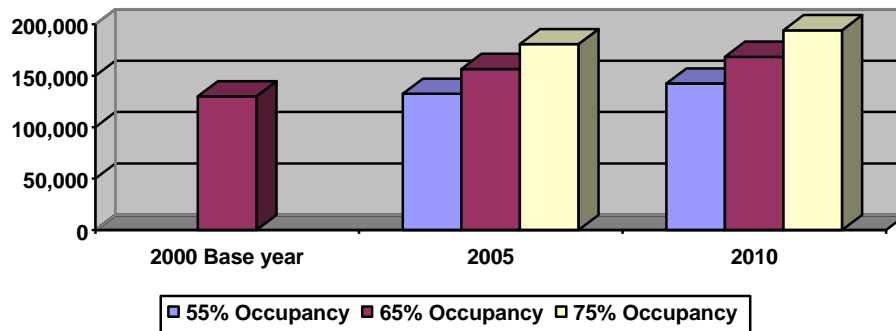
Because of its small size and special character, La Digue should not be considered for any additional accommodation beyond present proposals, except for small hotels. Some concerns have also been raised about the impact of large numbers of day-trippers on the island, as opposed to overnight stays. This is an issue that will be carefully monitored, in close consultation with all stakeholders, in order to ensure that the islands carrying capacity is not exceeded and that development takes place in a controlled manner.

Other islands may best be designated for no accommodation development with only day use allowed, or alternatively may be reserved only for the development of “eco-lodges” as described in Section 4 below.

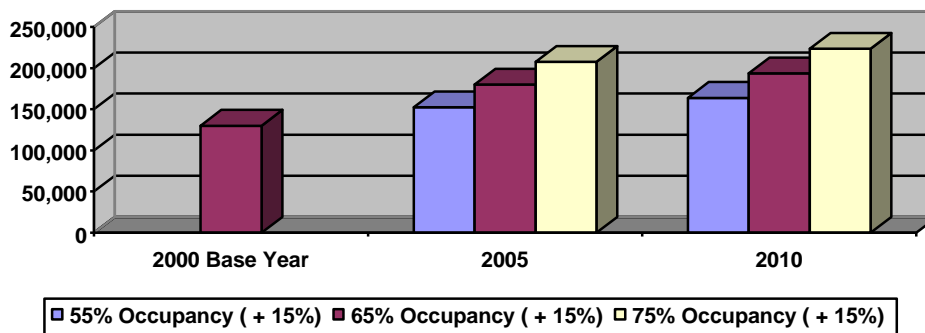
2.2 Increasing Arrivals / Market Targets

The following charts illustrates the projected range of increase in visitor arrivals, using the year 2000 as a “base-year”, based on the accommodation projections presented above.

*Chart 1
Projected Growth in Arrivals : 2000-2010 ⁶*



*Chart 2
Potential Increase in Total Arrivals : 2000-2010 (Including Visitors Staying in Unlicensed Accommodation (mainly with friends & relatives) & Live-Aboards ⁷ (excluding cruise ship arrivals)*



The above projections represent a product-led approach to establishing market targets. In **Chart 1**, which excludes visitors staying in unlicensed accommodation, the targets by 2005 are in the range of approximately 132,495 at 55% occupancy to 180,675 at 75%

⁶ Based on Visitors Staying in Licensed Accommodation)

⁷ Based on Chart 1 plus a conservative estimate of an additional 15% of visitors staying in unlicensed accommodation (with family and friends) or on live-aboards.

occupancy, with a midpoint of 156,585 at 65% occupancy. By 2010, the target is in the range of 163,532 at 55% occupancy to 194,362 at 75% occupancy, with a midpoint of 168,447 at 65% occupancy.

In *Chart 2*, which includes a conservative estimate of an additional 15% of visitors that stay in unlicensed accommodation, the projections for 2005 are in the range of 152,369 to 207,776, with a midpoint of 180,072. In 2010 the projections are between 163,911 and 223,516, with a midpoint of 193,714.

These are realistic targets based on the projected number of beds that will be available, an average length of stay of 10 days, and average occupancy rates over the past 10 years of around 54.7%. Thus, if occupancy rates and length of stay remain at the level of the past 10 years, the lower target range will be achieved. If the occupancy rate can be increased to 65% the midpoint targets will be met, while an increase of 20% in occupancy rates will enable the high range targets to be met.

It is assumed that the average length of stay will remain at the current level of ten nights. Even though one of the tourism trends is towards shorter vacation periods and more frequent vacations being taken per year, it is expected that, because Seychelles is a long-haul destination from most tourist markets, many tourists will stay for some time. Also, if more activities are provided for tourists, they will wish to stay longer and still be spending money on activities during their total time in the country. It is also expected that specialist markets such as diving and eco-tourism will tend to attract longer-staying tourists.

The extent to which these targets are met will depend on a number of interrelated factors, including the upgrading of product and service quality, an effective promotion and marketing strategy, and adequate air access.

Based on these figures, the average annual growth rate in tourist arrivals (staying in licensed accommodation) will be about 4% between 2000-2005, and about 1.5% between 2005-2010. The annual growth rate (including an additional 15% staying in unlicensed accommodation) would be about 7.7% between 2000-2005, and about 1.5% between 2005-2010.

2.3 Selective Expansion of Cruise Ship Tourism

The expansion of cruise ship tourism will be pursued on a selective basis, permitting cruise ships with higher spending passengers, but not permitting cruise stops to the extent that they generate excessive pedestrian congestion in central Victoria or other places. The harbour redevelopment project should include a cruise ship docking and terminal facility.

2.4 Increasing Tourism Yields

In 1999, the Central Bank of Seychelles estimated that based on Management and Information Systems Division (MISD) and Central Bank exchange records (purchases of foreign exchange from tourist by banks and hotels), income from tourism amounted to SR 596.2 million. This translated into an average expenditure per diem per visitor (yield) of around SR460.00 or approximately US\$83.⁸ However, based on tourism expenditure surveys conducted by the MISD, the estimate of tourism earnings for the same year was around 30% higher at SR 750 million, which translated into an average per diem per visitor of around SR 578 or approximately US\$ 105.⁹

Based on the projected overall enhancement of the tourism product, as well as an increase in the number and range of activities available to visitors, the target is for the average per diem per tourist to increase gradually from the current SR 578 (US\$ 105) to around SR 770 (US\$ 140) by 2005, and to around SR 825.00 (US\$ 150) by 2010. This is in line with the overall objective of a concerted effort to increase visitor numbers and yield at significant pace over the next five years, followed by a period of consolidation.

At the same time, it is estimated that the growing proportion of high quality “high yield” rooms will have a significant impact on total revenue. This is illustrated by recent estimates, by the Ministry of Economic Planning, that the 470 “high yield” beds existing in 2000 generated an average daily yield of US\$ 500 (SR 2,750 approx.) per tourist.

Assuming that the mid-point targeted increases in total visitor arrivals¹⁰ are met, this would result in total revenue increasing from the 1999 figure of SR 750 million, to around SR 1.659 billion in 2005, and to around SR 1.994 billion in 2010.

Table 10
Projected Tourist Arrivals, Daily Yield and Total Tourism Earnings
2005 & 2010

Year	Total Tourist Arrivals (65% Occupancy)	Visitor Nights (Low Yield)	Low Yield Daily Per Diem (SR)	Visitor Nights (High Yield)	High Yield Daily Per Diem (SR)	Tourism Earnings (SR million)
2005	180,072	1,347,580	770	218,270	2,850	1,659
2010	193,714	1,406,890	825	277,580	3,000	1,994

These estimates of tourism revenue do not take full account of the total contribution of tourism to GDP, since in addition to the difficulties in estimating revenue that are associated with the existence of the parallel market, the system of national accounting currently in place does not take account of indirect contributions from tourism to GDP. It is for this reason that the Ministry of Tourism and Transport, together with the Management Information Systems Division (MISD) and Central Bank of Seychelles (CBS) intend to introduce a system of Tourism Satellite Accounts (TSAs).¹¹

⁸ Based on the same method of calculation, in the year 2000 income from tourism was estimated at SR 600 million, with an average expenditure per diem per visitor of SR 445.

⁹ Estimates based on this method of calculation are not yet available for 2000.

¹⁰ Including estimated 15% staying in unlicensed accommodation

¹¹ See Part 1 : Section 3.

In summary, it is projected that with the implementation of the strategy to develop more high quality establishments, and a greater number and range of activities for visitors, the average yield per visitor can be gradually increased over the next 10 years.

Economic benefits can also be enhanced by establishing stronger linkages between tourism and other economic sectors, thus reducing foreign exchange leakages resulting from the import of items used in tourism, currently estimated at about 30% of total tourism earnings. There are opportunities, for example, to expand the local production of fruits and vegetables, poultry, fisheries items and hotel and restaurant furniture and décor to serve the tourism sector.

2.5 Air Transport Policy

In formulating air transport policy, close consideration will be given to national economic interests, especially the needs and demands of the tourism industry, and the need to maintain adequate freight capacity. To this end, the Directorate of Civil Aviation will, in consultation with all stakeholders (including Air Seychelles), continually review air transport policy in order to ensure that air access matches the targets for increased visitor arrivals.

One of the greatest challenges will be to respond to the increasing international and regional pressures towards the liberalisation of air services and the adoption of “open skies” policies, including a more liberal approach to the granting of “fifth freedom” traffic rights. This trend will make the negotiation of bilateral air services agreements that meet the national interest increasingly difficult.

The DCA will therefore adopt a pragmatic and flexible approach towards air liberalization, taking account of safety and efficiency, in accordance with the recommendations and practices of the International Civil Aviation Organisation (ICAO), and the wider national interest.

Over the longer-term, consideration will be given to permitting private operators to provide domestic air services, in order to promote private investment and generate competition, providing this is judged to be in the wider national interest.

Consideration will also be given to other approaches aimed at improving air services, including the commercialization of the non-aeronautical activities of the airport terminal, so that it can operate in a more efficient and effective manner.

3. ENHANCING TOURISM

3.1 Improving the Quality of the Tourism Product

An essential objective of VISION 21 is to improve and enhance the overall quality of the tourism product, with the aim of ensuring value for money and overall visitor satisfaction. Several strategic approaches will be adopted to achieve quality improvements.

In the first place, approval will only be given for the development of new projects that are of high quality standard and offer good value for money. This policy is already being pursued in the approval of several five-star hotels and resorts in recent years, and will be continued. Government will also continue to encourage the upgrading of existing hotels and resorts through offering incentives, and by maintaining a reasonable taxation structure to allow sufficient profits to be reinvested in product upgrading. In the case of establishments that do not meet the required standards, it is Government policy that such establishments should be removed or demolished and completely reconstructed. The overall objective is that all accommodation should be of three-star category or higher, and all future hotel or guesthouse development should aim at the highest quality for the respective category, while always taking account of environmental implications prior to construction (such as energy efficiency, water management and solid waste management), with the prime objective of reducing energy consumption in tourism establishments.

3.2 Establishment of a Hotel Classification System

To achieve these objectives, the hotel classification system will be reinforced to set the facility and service standards for various categories of hotel, and will classify all accommodation according to an appropriate and flexible grading structure that will be established, taking account of the special characteristics of Seychelles, as well as the requirement to provide “value-for-money”. The classification will also include an *eco*-label or certification, followed by publication of environmental performances by establishment.

A hotel classification system offers several advantages. First of all, it will provide the tourist, travel agent and tour operator with specific information about the quality level of each accommodation establishment so that they can select the standard required. Secondly, it will set standards for hotels and guesthouses to aspire to in the process of upgrading and maintaining their properties. Thirdly, it will guide hotel developers in the standards to be incorporated in the planning process according to the quality level that they wish to provide. Finally, it will establish a systematic basis for setting room rates, although these will still vary depending on the precise characteristics of the hotel.

Each licensed establishment will undergo an initial inspection, and be graded appropriately according to the agreed criteria. Thereafter, annual inspections will be undertaken to assess whether or not standards have been maintained. Depending on the outcome, an establishment may retain the rating, or it may be upgraded or downgraded. A special category may be needed for small hotels and guesthouses. The Tourism Development Division will administer the system of hotel classification.

3.3 Establishment of a Tourism Standards Board

A Tourism Standards Board will be appointed to establish and enforce good quality standards for accommodation and other tourist facilities and services. The Board will have overall responsibility for the recommended hotel classification system. More generally, the Board will advise the Ministry having the portfolio responsibility for tourism on all matters concerning product development and the upgrading of tourism products. The Board will also monitor the measures taken by tourist hotels and establishments providing tourist services to ensure the safety and security of tourists, including insurance cover in respect of their customers.

The establishment of the Board will provide the Ministry of Tourism and Transport with the legislative capability to regulate and enforce standards, and enable the Ministry to ensure that all tourism products conform to minimum standards depending on their classification status. The standard of facilities and services must be strictly monitored with the failure to rectify deficiencies resulting in penalties.

3.4 Improving Service Quality

Attention will also be given to improving the quality level of services provided by tourism enterprises through the various approaches set forth in the human resource development section of the plan. Of particular importance will be the further development of the Seychelles Hotel and Tourism Training College (SHTTC). In addition, the current U-First Programme will be reviewed and expanded, with increased emphasis on campaigns stressing the importance of offering good service to tourists. Tourism will also be incorporated as a subject in the national school curriculum.

3.5 Improvements to Infrastructure and Environmental Protection

Where needed, improvements will be made to the quality level of infrastructure, as set out in the infrastructure section of this plan. Attention will be given to improving waste management and ensuring adequate water supply. Environmental protection measures and programmes will be maintained and implemented as set out in the section on environmental considerations. Particular importance will be attached to ensuring a high quality level of the environment, as an important element of improving the tourism product.

3.6 Security and Safety

The security and safety of clients is an extremely important consideration in the tourism industry. Special emphasis will therefore be placed on ensuring that all tourism enterprises meet safety standards, and have adequate insurance protection to cover the security and safety of tourists using their facilities and services. With the sale or transfer of tourism enterprise licenses, new owners and managers will be monitored to ensure they meet the required operating standards.

Seychelles is blessed with a relatively low crime rate. This is a major advantage to promoting quality tourism, as security is increasingly a prime concern for international

travellers. Nevertheless, there is a need to continually review the situation, so as to ensure the continued safety of person and property of visitors and so maintain the good image of Seychelles internationally.

Security will be improved on beaches, as well as in Victoria and other places where there is a concentration of tourists. Consideration will be given to the organisation of a tourist police unit, specially trained to assist tourists and to maintain their safety and act as a deterrent to petty crime on beaches.

3.7 Partnerships for Quality

VISION 21 recognises that the responsibility for improving the tourism product ultimately rests with the private sector, with government playing a facilitating role by providing incentives and overall support to the development of the tourism sector. The private sector associations in the tourism sector can perform an important role in encouraging product improvements, and by encouraging a self-policing function in identifying and helping rectify sub-standard facilities and services among their membership. Tourism enterprise owners and managers will continue to be appraised of the government policy and programme for product improvement and how they can help achieve these improvements.

3.8 Diversifying Tourist Activities

While many tourists visit Seychelles primarily to relax, there is also an international trend towards more activity-oriented tourism. A greater range of activities broadens the types of tourist markets that can be targeted, and can also lead to greater tourist satisfaction levels and increased tourist spending, and may even encourage tourists to extend the length of stay. To meet this demand, government and the private sectors will work together to promote and develop the range of activities that are available to tourists. Such activities include eco-tourism activities directly related to the natural environment and/or the cultural heritage of Seychelles. These are covered in the following section.

Tourist establishments will be encouraged to provide a greater range of hotel-based recreational activities and services, including both day activities and evening entertainment, particularly during rainy periods.

The opening of an 18-hole golf course on Praslin in October 2000 represents an important addition to tourism infrastructure, which may be complemented by the development of a similar facility on Mahé.

3.9 Improving Information Services for Visitors

One common complaint made by visitors is that practical information related to holidaying in Seychelles is often lacking or difficult to find, both before departure and while in Seychelles. Not only does this detract from visitors' holiday experience, it also has an impact on tourism expenditures. In order to better promote and market the country's attractions, efforts will be made to improve information at all levels, including better signposting and marking of trails and walks. The Tourism Information Office in

Victoria will be upgraded, and staff provided with better information materials and training.

3.10 Increase Duty-Free Shopping Facilities

Duty free shopping is an attraction for tourists, and can also be a means of generating more revenue. An evaluation will be undertaken to assess the potential benefits that could be derived from increasing the range of duty free shopping outlets in Seychelles, including shops in central Victoria, the new airport terminal and perhaps elsewhere. Depending on the outcome of this review, government will give consideration to implementing appropriate policies and measures to facilitate the expansion of duty-free outlets.

3.11 Upgrading of the International Airport

A new airport terminal and runway on Praslin was officially opened in June 2001. The terminal complex, which has been constructed to international standards, accommodates up to 200 people and is capable of receiving light jets flying directly to the island. The buildings have been constructed in Creole style architecture, and have separate arrival and departure lounges, air conditioning and baggage conveyor belts. The complex, constructed on two floors, also has a restaurant, CIP lounge, shop and offices. The runway has been lengthened by 200 metres to 1400 metres and widened by 7 metres to 30 metres. The whole facility is a considerable addition to tourism infrastructure in Seychelles, and will permit the planned expansion of domestic services during the next 10 years.

The present international air terminal, opened in 1971, is to be replaced by a new combination international and domestic air terminal. The master plan for the development of Seychelles International Airport involves the construction of a new international passenger terminal incorporating the domestic terminal, with all necessary landside facilities as well as a new aircraft-parking apron. The terminal is programmed to serve 1,500,000 annual passengers with a peak hour enplaning and deplaning capacity of 1,000 passengers each for international operations and a peak hour enplaning and deplaning capacity each of 300 passengers for domestic operations. The new terminal will provide three contact (served by gate bridges) aircraft spaces and one remote space for international operations and five general aviation parking stands for domestic services in the first stage development. The present terminal building will be converted into a cargo terminal and in the longer term will also accommodate in-flight catering facilities.

The development of the new terminal area and conversion of the existing facilities will ensure adequate facilities to cater for both passenger and cargo traffic for the next 15 to 20 years, and the design concept for the new terminal area will also enable further expansion as air traffic increases.

3.12 Tourism Development Investment Policies and Incentives

The vision for tourism development in Seychelles will require considerable investment by domestic and international investors. Government will therefore continue to provide appropriate incentives in order to stimulate tourism development, including reinvestment in upgrading existing facilities.

Investment incentives are set forth in the Investment Promotion Act (IPA) of 1994 which includes provision for investment in tourism. However, should an establishment not qualify for the IPA, consideration may be given according to merit for a trades tax concession on capital equipment and building materials. Such concessions are primarily considered for newly approved enterprises that are beginning to set up their operations or existing enterprises that are undergoing an extension, upgrading or renovation programme. Trades tax concessions are not granted for any form of vehicle unless they are of a very specialized nature.

In order to encourage domestic investment in the tourism sector, restrictions apply to investment by non-Seychellois in small hotels of less than 25 rooms. However, some flexibility is applied to this policy, which may allow for foreign participation in small hotels provided the majority ownership remains for Seychellois.

There are also restrictions to foreign investment in specific activities, such as car hire projects, which are reserved for Seychellois. Presently, a company may start with a minimum of 5 cars and a maximum of 28 cars in the company fleet (or a maximum of 30 of which 2 must be chauffeur driven). Government will continue to encourage modernization and upgrading of car hire fleets to accepted international standards. Water sports facilities and services are also reserved for Seychellois, although foreigners may own minority shares in dive centers. Government will continue to apply such policies to encourage further domestic investment in tourism related activities.

Government will also give consideration to the introduction of further measures and incentives to act as a stimulus to investment in the tourism industry, including measures to reduce costs of production in the craft sector. At the same time, existing investment incentives will be periodically reviewed and adjusted based on circumstances and prevailing needs, with a view to ensuring efficacy and responsiveness to tourism development objectives and requirements during the plan period.

4. PROMOTING ECO-TOURISM AND COMMUNITY BENEFITS

4.1 The Growth Potential of the Eco-Tourism Market

The long-term economic sustainability of Seychelles' tourism industry is closely linked to the continued health of the natural eco-systems upon which it depends. VISION 21 therefore places great importance on promoting tourism development that takes account of the need to protect and conserve the natural environment. One aspect of this approach is to promote eco-tourism, a nature-based form of specialty travel defined by the International Ecotourism Society as "Responsible travel to natural areas that conserves the environment and sustains the well being of local people". Eco-tourism also encompasses a respect for local and traditional cultures.

While this definition has been widely accepted, it does not provide a functional definition for accurately estimating the size of the global eco-tourism market. For this reason, eco-tourism is best considered as a specialty segment of the larger nature tourism or "eco-travel" market, which covers a variety of travel industry segments, including adventure, heritage, culture, educational and sports, all linked together by an emphasis on fun, environmental sensitivity and social responsibility.

The eco-travel market is today recognized as the fastest growing segment of the travel industry. While it is a relatively small but growing niche market internationally, eco-tourists are typically willing and able to pay a relatively high cost to travel to the ideal destination. It is therefore a market that will be of great importance to Seychelles, in view of the wide international appreciation of our natural environment, and our firm commitment to the protection and conservation of the environment.

“Eco-tourism accommodates and entertains visitors in a way that is minimally intrusive or destructive to the environment and sustains and supports the native cultures in the locations it is operating “

4.2 Development of Eco-tourism Activities Related to the Natural Environment,

Seychelles has always paid careful attention to the preservation and conservation of the environment, to the extent that it is the country with the highest ratio of protected areas to total land area. While the process of social and economic development, including tourism development, inevitably presents major environmental challenges, the tourism industry can promote development models that are in harmony with the natural environment.

Vision 21 aims to exploit the comparative advantages of Seychelles as an eco-tourism destination in the broadest sense, through promoting a wide range of nature-based attractions and activities, including activities related to Seychelles' rich cultural heritage. In doing so, close attention will be given to ensuring this is done within a framework that increases public awareness of the environment, maximizes economic benefits for local communities, fosters cultural sensitivity and minimizes negative impacts on the natural environment.

Seychelles has several places suitable for eco-tourism including the Vallee de Mai and Fond Ferdinand in Praslin, the Morne Seychellois National Park, Curieuse, Aldabra, Cousin, Bird Island, La Digue, Silhouette and eventually some of the other islands. Some of these places should only allow eco-tourism activities, while others can also have eco-lodges. These should be small, typically not more than 20 beds, designed for natural ventilation and not air conditioned, use local or natural building materials, and apply energy conservation (and renewable energy sources) and non-polluting waste management techniques.

Eco-tourism activities include hiking, bird watching and observation of other fauna, flora and ecosystems and learning about local conservation practices. In some cases, the eco-tourists could actually assist local environmental personnel in conservation management. Eco-tourism could also include the underwater environment with eco-tourists engaging in snorkelling and diving and learning about marine ecosystems.

The Ministry of Tourism and Transport will work together with the Ministry of Environment to develop nature walks and other visitor facilities in the existing national parks on Mahé and Praslin, as well as the development of visitor facilities on some of the other islands.

The development of more, well-maintained, scenic viewpoints alongside roads and trails, where appropriate, will be undertaken as a relatively inexpensive addition to the attractions of the islands, particularly on Mahé.

Where there are local communities in the area, they should be involved in owning and operating the eco-tourism facilities and services so that they receive direct benefits from eco-tourism and in turn will support conservation of the local environment. Eco-tourism must provide detailed and accurate information about the area, and highly qualified guides should be available, to meet the expectations of eco-tourists. Eco-tourists as well as other types of tourists should be given environmental codes of conduct relating to both general environmental conduct in the Seychelles and codes for the particular area that they are visiting.

A detailed eco-tourism development strategy will be prepared and a few pilot projects undertaken as prototypes. Based on the experience with these pilot projects, the eco-tourism strategy and standards can be refined and applied for future expansion of eco-tourism. There are good examples of eco-tourism development internationally which can be reviewed to formulate approaches that are suitable for the Seychelles.

The incorporation of environmental activities into all new development projects will be encouraged, in order to provide more activities, and to inform tourists about the conservation of the Seychelles environment. Hotels will be encouraged to organise special presentations (lectures and video shows) on aspects of the Seychelles natural environment and ongoing conservation programmes. Environmental codes of conduct will be prepared for distribution to hotel guests.

4.3 Expansion and Improvement of Marine-Related Activities

The expansion and improvement of marine-related activities will be another priority in the diversification of eco-tourism attractions. This will include measures to encourage a more professional approach on the part of marine activity operators. The possibility of providing incentives to upgrade diving product and services to international standards will be explored, so that Seychelles can be more effectively promoted as an exclusive diving destination. For safety reasons, and to encourage more diving tourists, the existing decompression chamber on Mahé will be maintained in continuous operative condition.

Attention will be given to expanding sport fishing, while encouragement will also be given to the further development of yachting, which will include the provision of adequate mooring facilities on the outer islands and adequate waste disposal systems. Food and other supplies should be made more readily available at certain shore stops, and medical evacuation services provided (to be paid for by the users).

Efforts will be made to improve and expand the provision of water sports activities in the Beau Vallon Bay, including the possible development of a water sports centre. Water

sports centres could also be developed for South Mahé, possibly at Anse Royale or Anse La Mouche, and on Praslin, in the Cote D'Or area. All water sports centres should be carefully managed and monitored to ensure the safety of tourists.

4.4 Promotion of Community-Based Tourism

It is now widely recognised that if local communities are not involved in tourism projects from the beginning of the design stage through to implementation and management, community residents often will not support the project nor be in a position to benefit from it. The development of community-based tourism is thus an important objective of VISION 21, and is an integral part of the effort to promote eco-tourism activities.

Emphasis will therefore be placed involving local communities in tourism development. District administrations will have a particular responsibility in encouraging and supporting this involvement, in conjunction with tourism project developers and managers.

One aspect of this policy will be the promotion of village tours, which might include visits to schools and churches, or tours offering insights into traditional agricultural and fishing activities, demonstration of traditional craft making and description of traditional life styles and music and dance performances by villagers. The Craft Centre at Au Cap could be expanded into a cultural centre with a performance stage.

4.5 Promoting Cultural Heritage

The desire to experience different cultures and lifestyles has always been a major consideration of the international traveller in selecting a holiday destination. Although Seychelles may lack the long social and cultural history of many classical destinations, its vibrant Creole culture derived from the heritage of three continents, is particularly appealing.

Vision 21 seeks to promote this unique Creole heritage and make it more accessible to visitors, through giving support to existing cultural events, such as the annual Festival Kreol, and by encouraging the organisation of new cultural manifestations at both the national and district levels. This will be achieved through promoting close partnership between all stakeholders in the tourism industry, including local artists and musicians associations.

The conservation of historic monuments and provision of visitor facilities related to the historical and cultural heritage of Seychelles will also be actively promoted. Besides adding to the physical attractiveness of the overall environment, such monuments could also be included on tour itineraries (including self-guided tours) of the islands. The National Monument Board will prepare a historic preservation plan, and legislation and tax incentives adopted to facilitate implementation of the plan.

Efforts will be made to continually upgrade and improve the marketing of existing museums. In particular, the exhibit techniques and explanatory material at the National Museum of History and the Museum of Natural History will be improved, and facilities added for video presentations on the history, flora and fauna of Seychelles. The

development of the National Biodiversity Centre at Barbarons will also be an important additional attraction.

Accurate and interesting interpretation of features related to the natural environment and cultural heritage will add to the satisfaction of visitors. Interpretation techniques that could be employed include qualified guides, information brochures and books, descriptive signs and labelling, audio-visual presentations and demonstrations.

Another aspect of national culture that will be actively promoted is the Creole cuisine. Hotels and restaurants will be encouraged to utilise more local products and to include a wider range of traditional dishes on menus, and to provide information about the national cuisine and its preparation.

4.6 Development of Handicrafts

The expansion of the range and quality of craft products will be an objective of VISION 21. Although locally made craft products, including paintings and photographs by local artists, are widely available, particularly in Victoria, at the craft centre at Anse aux Pins and in hotel shops, there is considerable scope for expanding the craft sector.

The main issues to be addressed are related to the quality and cost of local craft products, which are considered rather high by tourists. Among the policy measures that will be explored are the provision of government incentives through soft loans, tax and fiscal concessions for the importation of raw materials and equipment, and improving opportunities for technical and entrepreneurial training. The promotion of local craft products could also be promoted through the adoption of a “Genuine Seychelles Product” label.

4.7 Redevelopment of Central Victoria

Seychelles boasts one of the world’s smallest capital cities, and in recent years much effort has been made to enhance Victoria’s physical attractiveness, particularly through the extensive planting of trees and shrubs. This programme will be continued, with the aim of developing Victoria into a model “garden city”.

At the same time, vehicular traffic has increased considerably, leading to some degree of congestion at certain times of the day. During the plan period, attention will be given to alleviating congestion, by diverting major traffic flows around the central area, developing car parks on the periphery of the city, and designating more pedestrian streets. Consideration will be given to making the existing pedestrian area of Market Street more interesting with landscaping, fountains, sitting areas, outdoor cafés and landscaping. Outdoor cafés could also be developed in other places in the central area. An integrated plan will be prepared to guide redevelopment in Central Victoria, which may include improvement of the business area. This will require identification of sources of revenue and sustainable financing mechanisms. Overall, the improvements proposed for Victoria aim at creating a more dynamic and lively city, in which tourists and residents alike will find more opportunities for leisure and entertainment, and which will in turn provide more business opportunities for the local community.

4.8 Public Beach Parks

There are no public beach parks in the country and beaches are used on an *ad hoc* basis for recreation purposes. As tourism develops, beaches will become less accessible even though the beach areas below the high tide line are for public use. Some good quality and accessible beaches should be designated as public beach parks and developed with visitor facilities and services such as picnicking and barbecuing facilities, changing rooms and toilets as well as providing life guards and emergency medical assistance.

5. DEVELOPING HUMAN RESOURCES FOR TOURISM

5.1 Key Issues in Human Resource Development

Currently more than 5,000 persons are employed in the tourism sector. About one-half of these are working in hotels and other types of accommodation establishment. One-quarter are engaged in tourism-related tour and travel services. The remainder are employed in restaurants, cafés, bars and related enterprises, recreational and related services, and by the Division of Tourism Development and Seychelles Tourism Marketing Authority.

The direct employment generated by tourism in hotels, restaurants, tour and travel operations and other tourism enterprises is projected to increase significantly during the next 10 years. The actual rate of increase will depend on a number of factors, including the rate of implementation and quality level of new projects, and the rate of expansion of activities and services available to visitors. To meet the increased human resource demands of the industry, it is estimated that an additional 5,000 persons will require training over the next ten years.

The need to increase the number of people employed in the industry through the development of a qualified and motivated Seychellois workforce is therefore one of the most critical factors to be addressed in order to improve and expand tourism in the Seychelles. Thus, it is not just a question of increasing the number of people trained for a career in tourism, since for the tourism industry the quality of the workforce is becoming increasingly important to meet the challenges of increased competition at the regional and global levels and to fulfill customers' expectations of value for money. The tourism workforce must be improved at all levels to ensure that Seychelles' five star environment is matched by five star service.

5.2 Development of the Seychelles Hotel and Tourism Training College (SHTTC)

The SHTTC at la Misere will continue to provide the focus of training for hotel, catering and tour and travel operations, and will be expanded and developed with purpose-built facilities and enhanced faculty capabilities in order to be able to adequately perform its intended function of providing qualified personnel for an expanded tourism sector.

A detailed development study has been carried out and Government has recently approved a redevelopment plan. The broad objective of the plan is to enhance the quality and quantity of resources available for training in the tourism and hospitality sector, by providing a modern purpose built college, with the required facilities and standards of a hotel college. The project has been jointly developed by all stakeholders in the tourism

sector, including various Government ministries, and private sector operators.

The SHTTC project has been designed to offer both pre-service and in-service training in all skills and at the supervisory and management level (including a diploma level management programme). It is also envisaged that the centre could be linked to other tourism training centres in the region, such as in Mauritius and Kenya, and elsewhere such as Singapore. Eventually, when the centre is properly serving the Seychelles, it could also serve some regional needs, receiving students from other Indian Ocean and African countries. Once the SHTTC is well established, it could conduct tourism-related research studies.

5.3 Complementing Training Provided at SHTTC

In order to increase the number of recipients of tourism training and accelerate the process of meeting manpower demand, appropriate traineeship programmes, targeting both school leavers and more mature candidates wishing to join the tourism industry, will complement training programmes at SHTTC. The Tourism Apprenticeship Programme will be revamped along with training of Apprenticeship Masters. In order to encourage employers to participate in the programme, designated “Master Hotels” will be accorded special status and provided with appropriate incentives. Encouragement will also be given to the establishment of private hotel schools, for which standards will be set and accreditation given by the National Qualifications Authority that is to be established.

5.4 Enlarge the Tourism Manpower Base

In view of the critical issue of manpower shortfalls in the industry especially at lower grades, a primary objective will be to attract more people to join the tourism workforce. Whilst employment of expatriates is a short-term strategy to alleviate labour shortage, it is not an adequate long-term solution, particularly during a period of rapid development fuelled by incentives to encourage investment in the tourism sector. While the employment of expatriates may improve levels of service quality in certain circumstances, the social impact and the impact on service identity must be carefully considered. The long-term solution to manpower shortfalls must be based on improving the quality and productivity of the Seychellois workforce.

To attract persons to attend the SHTTC and more generally to work in tourism, the potential for developing careers in tourism will be actively promoted. The following are among the approaches that will be adopted to increase the size of the tourism workforce:

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- Encouraging more young people to join the tourism industry through active tourism career promotion, including the production and distribution of a career booklet that can be distributed to schools, and the production of a video presentation on careers in tourism and media publicity;
- Organising career talks in schools and the Polytechnic;
- Improving the image and professionalism of tourism service providers by initiating an image campaign, to attract and retain capable new entrants;

- With the development of island resorts and higher end of the market products and services, young people have to be enticed to work on the outer-islands and take up careers in the tourism industry.

5.5 Incorporate Tourism in the School Curriculum

The ability of the SHTTC to attract young people into the tourism industry, and to emphasise the importance of good service, can be facilitated by making Seychellois more conscious of the importance of tourism, and the opportunities for employment and a career in the industry. To achieve this objective, tourism education should start at secondary level so that school leavers have the basic skills required for direct entry into the world of work.

Tourism will therefore be included as a subject in the school curriculum at all levels - primary, secondary and post-secondary. The Human Resource Section will work with the Ministry of Education to develop modules not only on tourism, but also on the attendant attitude to service required by all in order to boost the local tourism industry. The U-First Programme will be encouraged to supplement this innovation by continuing with more systematic presentations in schools. Tourism education will also emphasize the important relationship of tourism and environmental conservation.

5.6 Create a Pool of Seychellois Managers

In order to ensure that the industry as a whole is forward looking and has a long-term vision it is necessary to develop a pool of Seychellois managers and supervisors. There is therefore a need for increased provision of in-service training to personnel of tourism enterprises in order to upgrade existing staff, and offer mid- and upper level management training to Seychellois staff in order to improve their qualification to assume higher level positions in the enterprises. This will entail developing and formulating a comprehensive and detailed education and training plan, which should include:-

- Introducing management traineeships in conjunction with local tourism establishments;
- Exposing Seychellois managers to international training programmes;
- Increasing management-training opportunities locally.

Further, a review of existing training incentives and if necessary, advocacy for modification or introduction of new ones to increase the incidence of training for the tourism workforce is required. The Human Resources Development Section of the Ministry of Tourism and Transport will work closely with the Ministry of Social Affairs and Manpower Development to achieve this objective.

5.7 Increasing Opportunities for In-Service Training

Individual hotels and tour and travel agencies will be encouraged to continue to enhance existing in-house training programmes, and where appropriate to sponsor training of their

personnel overseas as supplementary training to the programme of the SHTTC. Other types of tourism enterprises such as diving and boating operations will be encouraged to continue and upgrade their own training programmes.

5.8 Emphasise Productivity and Service Quality

The quality level of services provided to tourists depends on the qualifications and attitudes of people working in tourism, and training to develop the necessary skills and mindsets is therefore of critical importance. The Seychelles Hospitality and Tourism Training College will facilitate the development of a comprehensive training programme, which will ensure that training curricula meet the needs of the industry, are well conducted and that co-ordination at the industry level is effective. Specifically, the following directions will be taken: -

- Identify core competencies for each industry sector so as to direct the right focus for the training programmes. This will enable identification of skills sets that are currently lacking;
- Review existing courses at the SHTTC with the aim of enhancing locally available training programmes to develop the critical core competencies identified;
- Develop training modules that help raise the proficiency and quality of service provided by tourism players. This will improve the professionalism of the tourism industry;
- Provide different options for training to join the industry: i.e. pre-service, in-service, apprenticeship;
- Establish training networks with leading international institutions so that internationally reputable and effective trainers can be brought to Seychelles to enable a wider pool of industry staff to gain better access to the best training programmes;
- Introduce a national certification scheme for tourism-related skills in line with the proposed National Qualifications Framework.

5.9 Improve Performance and Productivity

Another aspect of the problem of human resource development is the difficulty of attracting and retaining qualified Seychellois at all levels in the tourism sector due to relatively poor compensation packages compared to service exigencies. To address this problem, productivity and performance improvement measures will be developed, which will include the following strategies: -

- Establishing staff: client ratios for different categories of establishments;
- Developing Schemes of Service

- Ensuring localization of posts wherever possible;
- Promoting productivity based incentive schemes;
- Exploring flexible employment options to reduce over- or under- staffing.

5.10 Promoting a Culture of Quality Service in the Tourism Industry

In addition to the formal training programmes provided by the SHTTC, CSD and private enterprises and establishments, there is also a need to promote a culture of quality service throughout the tourism industry, and among the population at large, as it is important that persons who have contact with tourists, such as taxi drivers and retail shops clerks, be aware of the importance of tourism and how to handle relationships with tourists. Some sensitisation of taxi drivers to tourism has been carried out and this programme will be continued and expanded. Similar initiatives will be encouraged with respect to other occupations and professions. While government will play a lead role in this effort, it is essential that all stakeholders in the industry be involved. The U-First programme has an important role to play in this regard.

5.11 Reinvigorating the U-First Programme

The U-First programme is a national initiative with the objective of sensitising the public on the importance of the tourism industry to the economy of the Seychelles and consequent importance of providing good service. In addition to demonstrating the importance of tourism to the economic well-being of all Seychellois, it also aims to encourage high standards and quality of service in tourism and improve work performance and productivity. The programme utilises the media, an annual award programme and an annual theme.

The U-First programme has its own television and radio programmes and since 1997 has been involving local communities in its campaigns. The U-First programme is generally considered to have contributed positively to the development of the sector, and Government has expressed its commitment for its continuation and further development. In order to challenge the attitude of the population in general and the tourism workforce in particular, the Ministry of Tourism and Transport will therefore continue to review strategies to have the maximum effect at the national level, with a particular focus on the youth and on promoting tourism career guidance.

5.12 Manpower Planning

In order to develop effective Human Resource Development Programmes geared to both the individual needs of the workforce as well as the changing needs of the industry, a comprehensive database must be built up and updated. Analysis of this information will allow the development of a comprehensive manpower development plan for the tourism industry.

5.13 Eliminate Gender Stereotyping

The tourism employment structure reflects gender stereotyping in occupational choice and is becoming a constraining force in the drive to improve efficiency. There is a need to increase efforts to challenge erroneous attitudes to jobs so that eventually the right person can eventually be prepared for the right job regardless of gender.

5.14 Strengthening the Institutional Framework

Given the importance of this sector and the role of its workforce, implementation of these strategies should be supported by a strong institutional framework with the professionalism, competencies and long-term strategic vision to spearhead human resource development activities in this sector. The establishment of a Human Resource Development Institute is an option that will be considered, as this would strengthen strategic planning and monitoring of human resource development.

The Human Resources Section of the Division of Tourism Development has an essential role to perform in tourism education and training. The functions of this section include manpower planning at the sector level, training needs assessment and training plan formulation, pursuing the localization policy, development and maintenance of a human resource database, managing the U-First programme, and coordinating the planning and development of the SHTTC. The Section will therefore require strengthening with sufficient qualified staff and budget to properly carry out its functions.

It is important that the staff members of the Tourism Development Division including the SHTTC faculty and the Tourism Marketing Authority have the opportunity to improve their knowledge and capabilities, especially to respond to changing tourism trends and to effectively facilitate the expansion of tourism in the Seychelles. There are numerous short training courses, workshops and seminars on tourism-related topics held internationally each year that staff members could selectively attend. In addition to the government funding attendance at such training events, technical cooperation assistance will be sought.

6. INTEGRATING TOURISM FOR ENVIRONMENTAL SUSTAINABILITY

Tourism in Seychelles depends primarily on features of the natural environment, and it is therefore essential that the industry be nationally integrated so as to protect the natural environment from pollution and degradation, and also to ensure that the carrying capacity of the islands is not exceeded. The anticipated increased demands of the tourism sector must also be taken into account in improving infrastructure and waste management, as well as the conservation of resources such as energy and water.

6.1 Management of National Parks and Other Protected Areas

Seychelles has a good record in designating and managing a system of protected areas (accounting for around 45% of the total land mass), as well as marine parks and reserves. Two sites have been designated as World Heritage Sites - Valle de Mai, Praslin and Aldabra - because of their outstanding and unique flora and fauna. Management controls are also extended over other areas of activity to prevent environmental degradation, such as depletion of forests. Despite this good record, it is recognised that there is a need to

expand and improve the management of protected areas, and to strengthen the enforcement of regulation.

A new Environmental Management Plan for the Seychelles (EMPS) has been prepared for 2000-2010 (succeeding the EMPS for 1990-2000), which includes a sector on tourism and aesthetics. Management plans have been prepared for the protected areas, indicating the conservation measures that will be applied, and the appropriate types and locations of visitor facilities and uses. The management plans incorporate both conservation measures and development of visitor facilities and visitor use controls, as important aspects of increasing opportunities for tourist activities. A National Biodiversity Strategy and Action Plan is also being implemented.

Under the EMPS, environmental management also includes provision for the control of noise pollution, particularly that generated by motorized vehicles, stray dogs and loud music. It also addresses landscape aesthetics, such as appropriate building design (without stifling creativity), minimizing the visual impact of high transmitters and antennas (including satellite dishes), control of advertising signs, design and location of information and directional signs, road landscaping and reforestation where needed.

6.2 Coastal Zone and Marine Resource Management

Specific control measures will be undertaken to mitigate environmental impacts from tourism development, including measures to address impacts on both the land and marine environment as a result of physical alterations and habitat damage. These will include the introduction of guidelines on sound land use and site development practices, determining and not exceeding carrying capacities, maintaining visitor use controls in sensitive ecosystems and vulnerable wildlife areas, proper construction of piers, jetties and groynes (or no development of these if negative impacts would be generated), prohibiting anchors being dropped indiscriminately in coral areas, reducing sedimentation of the coastal coral area from land erosion and controlling visitor use in coral areas.

Existing plans and programmes establishing guidelines to control development in coastal areas will be continued, including the Coastal Zone Management Programme and Marine Resources Management Programme, and additional legislation will be developed wherever appropriate. In order to protect the coastal zone, especially from storms and sea level rises, all tourism and other permanent development will be subject to a mandatory set back of 25 metres from the mean high tide line with a greater set back required in vulnerable areas. Existing mangrove and freshwater wetlands will be reserved and protected to act as hydrological sponges and function as important habitats for marine life and birds.

The prevention of damage to coral by boat anchors is being addressed, including the adoption of national standards for mooring buoys. Several important types of coral and shells are openly sold in Seychelles and national legislation needs to be adopted for corals and shells that are listed in the Convention for International Trade in Endangered Species (CITIES).

6.3 Tourism Planning and Development Standards

The physical development of tourist facilities provides the immediate environment for tourists during much of their stay in the Seychelles, and largely determines the extent to which the facilities are successfully integrated into the natural environment and settlement patterns of the area and country. The two aspects of facility development standards are the macro level of integration and micro level of site planning and design. The further development of all tourism infrastructure will thus be subject to comprehensive planning procedures and controls, with the aim of meeting standards and to ensure minimal environmental impact and sustainability.

All development including tourism projects are subject to environmental authorisation and an **environmental impact assessment (EIA)** procedure is required for all projects that may have environmental impacts. The EIA procedure provides the basis for preventing environmental problems through appropriate design of projects. In addition, tourism projects (and other types of development) should each have an environmental management plan prepared and approved by the Ministry of Environment, who then monitor the project to ensure that the management plan is being followed.

6.3.1 National and Tourism Development Area Land Use Planning

It is essential that VISION 21 and the new national land use plan and development area plans be coordinated so that there is no conflict of tourism land use patterns, and that the two plans reflect the same tourism development policy and strategy. This will ensure that tourism development is well integrated into the overall development patterns of the country. The Ministry of Land Use and Habitat is preparing a new national land use plan to guide overall physical development. The new plan will designate tourism development areas, as well as other types of land uses and the transportation system. Detailed development area plans are also being prepared. These will include hotel and resort sites.

6.3.2 Tourist Facility Site Planning and Design Standards

The present approach to reviewing tourism development proposals is to evaluate each proposal on its own merit. Some standards have been generally accepted and applied including a minimum setback of buildings from the high tide line of 25 metres in coastal areas, a building height limit of below the tops of coconut trees in rural areas and four stories in Victoria, and use of Creole style architecture. Provision of adequate infrastructure and meeting building regulation requirements and fire and safety codes are also necessary.

In the future, a comprehensive set of standards and design guidelines, including suitable building materials to be used, will be established. These standards and guidelines will be given to each prospective developer and his design team to guide their planning and design of the project. These guidelines will also be used in reviewing proposed tourism projects.

One important standard will relate to the carrying capacity of the site in terms of the density of development proposed. Project proposals should include landscape plans and the development standards should include appropriate types of landscaping materials and outdoor lighting. For eco-tourism facilities such as eco-lodges, a separate set of development standards and design guidelines will be prepared.

6.4 Improving Infrastructure for Tourism

The projected expansion of the tourism industry will require improvements to infrastructure, including road and water transportation, water supply, electric power, sewage and solid waste management and telecommunications.

6.4.1 Roads and Road Services

Seychelles already has a well-developed road network on the major islands, which are regularly maintained. A new dual carriageway has recently been opened, linking the International Airport with Victoria, and there are plans for further development of the road network to meet increased demand. Attention will be given to the placement of more road name and tourist information signs, which will be of particular benefit to tourists travelling by rented car. Consideration will also be given to the construction of pavements in areas of concentrated tourism development, such as Beau Vallon, and to the designation of additional pedestrian areas in Victoria. Finally, existing access roads to hotels and resort sites will be improved, or developed to serve new establishments.

The Seychelles Public Transport Company (SPTC) will be encouraged to further ameliorate bus services on Mahé and Praslin, with particular attention being given to providing information on routes and services, as well as to improving punctuality for the convenience of tourists and residents alike.

Taxis are readily available, and the general level of service is good. However, efforts will be made to extend specialised training to taxi operators in order to improve customer service. For the convenience of persons ordering taxis, the establishment of a centralized call service will be encouraged. A taxi depot will be established to serve South and West Mahé, similar to the one located in central Victoria.

There is a need to improve rental car services, and to establish appropriate quality and safety standards that must be met by all operators. This is an issue that will be addressed by the Tourism Standards Board. The maintenance of rental bicycles should be improved, particularly where they are widely used by tourists, particularly on La Digue, and to a lesser extent on Praslin.

6.4.2 Sea Transportation

With the recent introduction of high-speed catamaran services to Praslin, boat transportation services among the major islands are considered adequate for residents and tourists at the present time. However, the projected expansion of tourist arrivals requires that the situation be monitored closely. The full implementation of the ongoing East Coast Phase III Project will provide improved harbour facilities at Port Victoria, including better docking and other facilities including for cruise ships.

6.4.3 Water Supply

Despite a high annual rainfall, Seychelles has limited resources of water, due largely to the high per capita cost of infrastructure development in the form of dams and reservoirs. The demand for water supply by tourism enterprises as a percentage of total water use on

the islands may be up to 10% on Mahé, 30% on Praslin and 25% on La Digue. The present safe yield of the water systems on Mahé and Praslin are below demands and there are deficits of reliable supply, resulting in supply shortages during dry periods. To meet the projected increased demands, including from new tourism development, Government will implement new projects to augment water supply, as well as water conservation measures.

The increased demand from tourism development on Praslin and La Digue will require special attention. On both islands, attention will be given to exploring potential means of augmenting the water supply, including utilisation of additional groundwater resources and desalination. On other granitic islands adequate water supplies should be available from surface and ground sources. On the coral islands, which are dependent on ground water resources that are subject to contamination by seawater, the development of desalination plants, such as those on Desroches and Coetivy, will be required to serve future tourism development.

6.4.4 Electric Power

Following the commissioning of the new Victoria “C” Power Generating Station in 2000, the capacity of the electric power system meets existing demand and projected growth on Mahé for the next three to five years. The situation will be continually reviewed and additional capacity will be developed depending on future demand.

The generating capacity of the power station on Praslin, which also serves La Digue, is currently in the process of being increased, and based on projected demand including that of new tourism projects, will be adequate for the next ten years. Again, the growth in demand will be continually reviewed and capacity increased accordingly. Energy demand on other islands is currently met by fossil fuel generators, though in the future emphasis will be placed on the development of solar energy to supplement power supplies generated by conventional means.

6.4.5 Telecommunications

The existing telecommunications infrastructure in Seychelles is competitive and well developed and presents no obstacles to the expansion of the tourism industry. Satellite communication with digital microwave is available to all the granitic inner islands, and fibre optic cables are being installed on all new exchanges. The existing overhead cables are steadily being replaced with underground cables, which offer more security and flexibility, and are also more environmentally friendly. All new hotels are being digitally connected, and the plan is to digitise the entire system within ten years. The extensive mobile telephone networks have international roaming capabilities.

6.4.6 Waste Management

a) Sewerage

Proper sewage disposal systems are essential to prevent pollution of surface and ground water, and especially in the coastal areas where hotels are developed and tourists go swimming and diving. While water pollution is not a serious problem anywhere in Seychelles, it is a threat in the relatively congested Beau Vallon area, and pollution levels

in the Port Victoria area need to be addressed. At present, only the Victoria area is served by a centralized sewerage system. This system is being expanded and will mitigate the port pollution problem. A new sewerage system will also be implemented for the Beau Vallon area. Once these projects are completed, any hotel or other substantial development in the Greater Victoria and North West Bay (Beau Vallon) sewerage areas must connect to the public sewer systems. Elsewhere on Mahé, the larger hotels have their own sewage treatment plants, while smaller hotels use septic tanks.

On Praslin and La Digue, there is currently no central sewerage system, and only a few of the larger hotels have their own treatment facilities. Other establishments use septic tanks, as do hotels on all other islands. A feasibility study is being conducted on developing a central sewerage system for the Cote D'Or area on Praslin and, if determined to be feasible, the system developed.

In future, all tourism developments of larger and medium size on Mahé, Praslin and La Digue, and on the other islands, will be required to provide their own package sewage treatment plants, while small enterprises must construct septic tanks. These facilities will be monitored to ensure that they are properly maintained and meet the pollution control standards of the Ministry of Environment.

b) *Solid Waste*

Solid waste collection and disposal are now being adequately handled on Mahé and La Digue, but there are problems with waste treatment and disposal on Praslin. The solid waste generated on Mahé is presently taken to public collection points and collected on a regular basis by designated contractors and deposited at the Providence landfill site. Commercial enterprises like hotels can have their waste collected by the contractors or other organizations and taken to the Providence landfill. The Providence landfill is being developed with waste management facilities including a treatment plant for hazardous wastes and a composting operation. A new sanitary landfill will open at Anse Royal in 2002, with sufficient capacity for the next 15 years.

A similar collection system is in operation on Praslin, with a sanitary landfill located at L'Amitie. As the site currently has no treatment facilities, there is a threat of ground pollution finding its way to the sea. The establishment of a waste treatment facility at L'Amitie is therefore a priority. La Digue also has a similar waste collection system, and a new sanitary landfill, which incorporates some treatment facilities, has been developed near Anse Source D'Argent. This site has a capacity of 15 years and can subsequently be extended.

Hotels will not be allowed to develop their own solid waste disposal facilities because of problems associated with properly managing them.

c) *Waste from Nautical Tourism*

Boat and ship-generated waste can no longer be disposed at sea under the terms of the MARPOL Convention. However, there are no facilities available in the Seychelles for disposal of waste oil and sewage from boats and ships and it is likely that much of this material is discharged at sea. Garbage from boats and ships is currently bagged and disposed for a fee at the sanitary landfill. To prevent transmission of diseases, this ship-generated garbage should be disinfected before it is transported to the land.

6.5 The Role of Tourism Enterprises in Promoting Environmental Conservation

In addition to the national strategies outlined above, tourism enterprises will be encouraged to assume a proactive role in promoting the protection and conservation of the natural environment. To this end, tourism establishments and other enterprises will be encouraged to adopt a number of approaches, including: -

- Adopting alternative sources of energy, such as solar energy for water heating;
- Conserving electrical energy through techniques such as use of low-energy light bulbs, automatic shut-off switches in hotel rooms and reducing the need for air conditioning by designing buildings for natural ventilation.
- Applying water conservation techniques such as installing water saving devices, encouraging guests to conserve water, planting landscaping plants with low water demands, and recycling treated sewage effluent for irrigation use.
- Minimizing production of solid waste material through bulk purchase of supplies, and using products with low waste components, and packaging materials that are biodegradable or can be recycled.
- Eliminating the use of detergents containing phosphorous compounds.
- Distributing tourist codes of environmental conduct when tourists are using the marine environment and visiting protected land areas or parks and reserves. Tour guides should include the codes of conduct in their presentations.
- Applying green establishment programmes whereby tourism enterprises that observe environmentally appropriate practices receive internationally recognized awards. The various tourism enterprise associations should become involved in promoting green establishment programmes.

7. WORKING TOGETHER FOR SUCCESS

7.1 Promoting Partnership

A national partnership approach is vital for an industry as diverse and all encompassing as the tourism industry, as it is only through working together as a team that a sense of common purpose and direction can be achieved.

In implementing the various strategies contained in VISION 21, it is therefore important that a spirit of broad national partnership is generated, both between different government ministries and departments and other agencies, and between government and the private sector and civil society. This synergy of effort will have a positive effect on raising national awareness on the importance of the industry, and will ensure efficient utilisation of the skills and capacities of all stakeholders.

The partnership approach is based on the principle that there is mutual benefit for all partners. It is a “win-win” philosophy that will benefit all involved, directly or indirectly,

in the tourism industry, including government, the private sector, employers and employees and the local community. Through its contribution to economic and social development, the development of the tourism industry will enhance the quality of life and well being of the Seychellois people as a whole.

It should be emphasised that this spirit of working together towards a shared vision must exist within and across sectors. In other words, there must be close coordination and partnership within the public and private sectors, as well as between the two sectors.

Partnership will be a vital component in all phases of development of the tourism industry. Close collaboration between government ministries and agencies and the private sector will result in the formulation of synchronised policies and a favourable business climate conducive to the development of a consistent and high quality tourism product.

Partnership must exist at all levels, including government to government, between different government ministries and departments, between private sector agencies and between the public and private sectors.

7.1.1 Tourism Diplomacy

Seychelles will continue to promote and develop government-to-government cooperation in the field of tourism, both at the bilateral level and through participation in international and regional tourism organizations. Seychelles is a member of the World Tourism Organization (WTO) and its Commission for Africa, the Southern African Development Community (SADC) and its Tourism Sector Coordinating Unit (TCU), the Regional Tourism Organizations of Southern Africa (RETOSA), and participates in the tourism cooperation activities of the Indian Ocean Commission (IOC). Since January 2001, the Indian Ocean Tourism Organizations (IOTO) has been based in Seychelles. Such organisations provide platforms for promoting cooperation in all areas of the tourism industry, including infrastructure and tourism projects, air services, and the joint promotion and marketing of destinations.

7.1.2 Inter-Agency Cooperation at the National Level

The formulation of VISION 21 involved an extensive process of consultation between different government ministries and agencies, and it is essential that this approach be continued in the implementation phases. Indeed, the successful implementation of this national tourism policy will depend on the pooling of capacities, skills and expertise and close coordination by different government agencies.

7.1.3 Cooperation Between Private Sector Agencies

There are numerous tourism associations representing all sectors of the industry, including the umbrella organization of the Seychelles Tourism Association. These associations perform an important role in addressing issues of common concern, and in representing their member's interests to government. They also contribute to maintaining the professional standards of their members and sponsor training programmes, as well as special events and other functions.

VISION 21 advocates partnership and collaboration between such associations within the tourism industry, as each association has an important role to play in making sure that the industry is nationally integrated. This approach will contribute to the overall well-being of all Seychellois, as achievements in one sector of the industry invariably result in benefits in other sectors.

7.1.4 Partnership Between the Public and Private Sectors

Partnership between the public and private sectors is essential in view of the complementarities of their respective roles. While government will provide the direction, policy and regulatory environment to support the realisation of VISION 21, it is the private sector that will make the vision a reality through its investments in the industry.

Central to this collaborative approach will be the Seychelles Tourism Advisory Board (STAB), comprising a membership of mostly private sector representatives, which was established in 1999 to advise on all aspects of the tourism industry. In addition, the Joint Economic Council (JEC) established in 2000, will provide a forum for the public and private sectors to deliberate on macro-economic policy issues, including those impacting on the tourism industry.

7.1.5 Partnership and Civil Society

VISION 21 recognises that because of its major contribution to the economic life of Seychelles and the Seychellois people, the tourism industry is everyone's business. Government is therefore committed to implementing tourism awareness programmes, both for the general public and in the school system. The aim will be to promote a greater understanding, acceptance and support for the tourism industry.

8. PROMOTING THE VISION

The success of VISION 21 will depend most critically on the ability to effectively champion and promote Seychelles' image as a quality and value-for-money destination that stands out from its competitors. The promotion of the vision will take many forms, and will be undertaken at all levels by the public and private sectors agencies, and by individuals and companies. Everybody has a part to play, since Seychelles' tourism industry can only achieve the desired results if all stakeholders appreciate the enormous potential of the industry and support it wholeheartedly. Thus, while government can ensure an environment conducive to the development of tourism, and the private sector can be the engine that drives the industry through its investments, all of this will be to no avail unless ordinary Seychellois understand how tourism impacts on his or her well-being, and so demonstrate a friendly and positive attitude towards tourists.

8.1 The Role of the Seychelles Tourism Marketing Authority (STMA)

In 1999, the Seychelles Tourism Marketing Authority (STMA) was established to market and promote tourism to the Seychelles. The scope of its activities includes implementation and coordination of local and international marketing activities through its various tourism offices and representative agencies abroad, research and liaison with the Government and the private sector. STMA is responsible to a Board, which is chaired

by the Minister of Tourism, and has a strong representation from the private sector, including Air Seychelles, the national carrier.

As Seychelles is ecologically sensitive, STMA's key role is to market the destination sensitively and within the limits of its carrying capacity. An enviable reputation for social harmony and an enlightened approach to conservation has ensured that almost half of our limited landmass has been set-aside as nature reserves. Seychelles is in the fortunate position of being able to responsibly plan, control and limit the development of the tourism industry to guarantee this will never impact negatively on the sustainability of its unique ecosystems.

Concentrating efforts on building awareness, raising the profile of the destination, through media activities, direct relations with intermediaries and providing focused Web sites and services, STMA will also be maximising the potential of existing customers. It is unlikely that visitor numbers can be increased by more than 30%, so proactive yield management is the primary aim. STMA is able to influence planning decisions to ensure that supply meets demand, and therefore has an important role in developing and managing the product sustainably.

The biggest challenge is the country's scale of the tourism industry. A strategic alliance and an active partnership between the public and the private sector are the keys to success in the promotion of tourism competitiveness, the enhancement of the destination's appeal, its marketing efficiency, productivity and a sustainable development.

STMA increasingly sees itself as a unifying force, coordinating the efforts of the different public - private sector players in the industry.

8.2 New Approaches to Marketing

With the assumption of new roles, product enhancement and the re-positioning of Seychelles' tourism industry, new approaches to marketing have to be embraced by STMA to enhance existing marketing strategies. The emphasis of the new marketing thrust will need to focus on image repositioning, engaging new promotional vehicles and targeting market segments, in very close collaboration with the tourism industry.

STMA has formulated a new marketing strategy and promotion programme, based on an extensive market research exercise in Europe. The new marketing strategy launched during 2000, focuses on the traditional Western European markets, while not neglecting the emerging markets in Africa, Eastern Europe, Asia and the Americas.

Seychelles is now being marketed and branded as a product - *a very natural, unprocessed product*. This is echoed in our logo – a series of circles expanding outward from a lush green island in the centre, surrounded by a white beach, a coral fringing reef and finally the endless blue waters of the Indian Ocean – and also in our commitment to ensure Seychelles remains *as pure as it gets*.

The new slogan “*Seychelles – as pure as it gets*” together with the new logo symbol and imaginative photographic materials, represent an approach to re-position Seychelles and

differentiate it from other destinations, with an emphasis on quality and the unspoiled beauty and purity of the islands.

In addition to the enhanced product quality - particularly as represented by new luxury establishments - niche markets such as diving and other marine activities, and eco-tourism will be promoted. The facilities and services that support those markets segment will be developed and improved at the same time. The revitalized image will be that of a high quality destination with a beautiful and well-protected natural environment of unusual flora and fauna, interesting cultural heritage and friendly people.

Seychelles is a small country with limited resources competing in a highly aggressive global travel market. The destination is high value, low volume and many of its visitors will only come once in a lifetime, meaning that STMA has to constantly seek new visitors. Therefore STMA needed to adopt a solution that would provide a cost effective and co-ordinated approach.

Considering the exponential growth of Internet usage, the dominance of “travel” in IT, and a high propensity to use the Internet amongst Seychelles’ core consumer markets, STMA has embarked on an innovative and ambitious web development programme. A suite of websites are being developed as part of a long term destination management and marketing strategy to increase consumer and intermediary access to concise, high quality information about the Seychelles, and will reflect and complement the brand and marketing campaign.

The size, location and nature of the destination are major challenges. A strategic partnership of all the stakeholders will become increasingly important because of the growing challenges facing the industry. By creating a shared mass of human and financial resources, Seychelles will be more prepared to address unexpected events and stretch its resources to bridge the gap between current capabilities and future opportunities.

PART THREE

IMPLEMENTING VISION 21

SUMMARY OF ACTIONS AND TARGETS

Implementation of VISION 21 will be a challenge, and will require continuous monitoring. It will also require strong commitment on the part of both the public and private sectors, as well as by the Seychellois people in general.

VISION 21 will require the allocation of sufficient resources from Government, particularly for the “public type projects”, even though it is understood that for many of these projects, user fees will eventually pay for part or all of the project or at least its operational cost. In some cases, some international donor assistance might be available. At the same time, Government will create an enabling environment for action by the private sector by maintaining existing incentives and introducing others where this is appropriate.

VISION 21 demands the consistent and effective application of tourist facility and service standards as a necessary precondition to improve the quality of tourism. It is not enough that such standards are adopted. They must also be rigorously enforced, not only in tourism but also in environmental protection and other areas of activities that relate to tourism.

Our tourism industry is already the key sector in the national economy, but with strong commitment on the part of the public and private sectors to implement the strategies outlined in VISION 21, our tourism industry can reach new heights and make an even greater contribution to our shared future. Many of the actions and projects proposed in VISION 21 will generate spin-offs throughout all sectors of the economy and will thus contribute towards making Seychelles more prosperous.

The VISION 21 Action Programme for Tourism Development thus sets out the actions and projects that should be carried out during the years 2000-2010. Some of these actions and projects are already ongoing, or are due to be implemented in the immediate future. Others will be implemented over a longer period, depending on various factors, including the nature of the action/project and the availability of resources. The Programme thus represents a general guide for tourism development, which will also form a basis for the development of more specific projects and programmes to achieve the objectives of VISION 21.

The programme identifies the lead agency and the main implementing partners from both the public and private sectors. The actions and projects contained in the programme are in many cases the joint responsibility of government and the private sector, with government playing either a lead or coordinating role in encouraging and facilitating private sector activities. In many cases the Division of Tourism Development will be the government agency required to play the lead coordinating role.

The implementation of the Action Programme will be monitored on a continuous basis by the Division of Tourism Development, and will be subject to periodic review.

VISION 21 ACTION PROGRAMME FOR TOURISM DEVELOPMENT

RECOMMENDED ACTION	IMPLEMENTATION PERIOD				Lead Agency
	Ongoing/Continuous	Within 1 Year	Within 5 Years	Within 10 Years	
RE-DEFINING TOURISM					
Approval of the Vision 21.		✓			MTT
Establish Vision 21 Implementation & Monitoring Committee.		✓			MTT
Build a national partnership to implement Vision 21.		✓			MTT
Organise a series of workshops to sensitise and inform all stakeholders and the general public on the aims and objectives of Vision 21.		✓			MTT
EXPANDING CAPACITY & INCREASING YIELDS					
Upgrade existing accommodation establishments	✓				MTT
Develop new high quality accommodation establishments.	✓				MTT
Expand cruise ship tourism on a selective basis.	✓				MTT
Promote and encourage the development of more value-added activities, and stronger linkages between tourism and other economic sectors to reduce foreign exchange leakages on imports	✓				MTT
Continually review air transport policy to ensure that air access matches targets for expanded bed capacity	✓				MTT
Encourage more direct and efficient air access from more tourist market areas by adopting a relatively liberal approach to fifth freedom traffic rights.	✓				MTT
Adopt flexible policies to air carriers wishing to use Seychelles as a stopover or as a destination.	✓				MTT
Give consideration to allowing private operators to provide domestic air services, in order to promote investment and the further enhancement of operations.			✓		MTT
ENHANCING THE TOURISM PRODUCT					
Establish & start operation of the Tourism Standards Board to advise MTT on all matters concerning product development		✓			MTT
Reinforce the functioning of the hotel classification system.		✓			MTT
Apply tax & other incentives for product improvements.	✓				MoF
Give attention to promoting improvements in service quality through various approaches as set out in the human resources section of Vision 21.	✓				MTT
Review and expand the U-First Programme with increased emphasis on campaigns emphasizing the importance of good service.		✓			MTT

RECOMMENDED ACTION	IMPLEMENTATION PERIOD				Lead Agency
	Ongoing/ Continuous	Within 1 Year	Within 5 Years	Within 10 Years	
Incorporate tourism as a subject in the school curriculum.		✓			MoEd
Give attention to improving the quality level of infrastructure as set out in the section dealing with integrating tourism for environmental sustainability.	✓				MTT
Ensure that all tourist establishments meet safety standards and have adequate insurance protection to cover the safety and security of clients using their facilities & services.	✓				MTT
Continually review the situation with regards to safety and security of tourist generally, and specifically improve security on beaches and other places where there is a concentration of tourists.	✓				MTT
Give consideration to the establishment of a tourism police unit.		✓			MTT
Government and the private sector to work together to expand and diversify the range of activities available to tourist.	✓				MTT
Encourage tourist establishments to provide a greater range of hotel-based recreational activities and services, both during the daytime and evenings, particularly during rainy periods.	✓				MTT
Development of an 18-hole golf course on Mahé.				✓	MTT
Improve information services for visitors, including better signposting and marking of trails and walks.	✓				MTT
Conduct an evaluation to assess the potential benefits that could be derived from extending the range of duty free shopping outlets in Victoria, the new airport terminal and elsewhere.			✓		MoF
Development of a new international air terminal on Mahé.				✓	MTT
Upgrade other domestic airstrips as necessary.	✓				MTT
PROMOTING ECO-TOURISM & COMMUNITY BENEFITS					
Prepare a detailed eco-tourism development strategy, with an emphasis on promoting community participation and benefits, and including pilot projects as prototypes.		✓			MTT
Identify existing ecotourism sites and other sites with potential for ecotourism development.	✓				MTT
Develop model eco-tourism projects including eco-lodges.	✓				MTT
Develop visitor facilities in national parks.	✓				MOE
Develop more and better-maintained scenic viewpoints alongside roads and trails.	✓				MOE
Preparation of detailed and accurate information about ecotourism sites, including codes of conduct pertaining to specific natural sites.	✓				MOE
Encourage the incorporation of environmental activities into all new development projects, in order to provide more activities, and to inform tourists about environmental conservation in Seychelles.	✓				MOE

RECOMMENDED ACTION	IMPLEMENTATION PERIOD				Lead Agency
	Ongoing/ Continuous	Within 1 Year	Within 5 Years	Within 10 Years	
Preparation of environmental codes of conduct for distribution to visitors.	✓				MOE
Expansion and improvement of marine-related activities as another priority in the development of ecotourism attractions.	✓				MTT
Improve and expand diving facilities and services; and ensure the decompression chamber on Mahé is maintained in continuous operative condition.	✓				MTT
Encourage the expansion and improvement of sports fishing operations.	✓				MTT
Encourage the further development of yachting, including the provision of adequate mooring facilities on the Outer Islands and waste disposal systems.			✓		MTT
Promote the improvement and expansion of water sports activities in the Beau Vallon Bay area, and the possible development of additional water sports centres in South Mahé and Praslin.			✓		MTT
Promote village tours and cultural tourism activities as part of the strategy for involving local communities in tourism, and particularly ecotourism activities.	✓				MTT
Promote Seychelles' unique Creole cultural heritage and make it more accessible to visitors, through giving support to existing cultural activities and by encouraging the organization of new cultural manifestations at national and district levels.	✓				MLGSC
Preparation of a historic preservation plan, and the introduction of legislation and tax incentives to facilitate implementation, in order to promote conservation of historic monuments and development of visitor facilities.			✓		MLGSC
Upgrade and improve the marketing of existing museums.	✓				MLGSC
Implement the National Biodiversity Centre Project at Barbarons.			✓		MOE
Encourage restaurants and accommodation establishments to promote the Creole cuisine and to utilize more local products in menus.	✓				MTT
Introduce measures to promote Improvements in the quality and costs of handicraft production, as well as the introduction of a "Genuine Product of Seychelles" label.	✓				MIB
Continue the programme to develop Victoria into a model "Garden City", paying attention to alleviating traffic congestion and designating more pedestrian areas, so that Victoria becomes a more dynamic and lively city to the benefit of residents and tourists.	✓				MOE
Designate a number of good quality and accessible beaches as beach parks, equipped with visitor facilities such as picnicking and barbecue facilities and providing lifeguards and emergency medical facilities.	✓				MOE

RECOMMENDED ACTION	IMPLEMENTATION PERIOD				Lead Agency
	Ongoing/ Continuous	Within 1 Year	Within 5 Years	Within 10 Years	
DEVELOPING HUMAN RESOURCES					
Implement the project for the redevelopment of the SHTTC			✓		MTT
Encourage more young people to join the tourism industry through active career promotion, including production and distribution of written and video presentations on careers in the industry.	✓				MTT
Organise career talks in schools and at the Polytechnic.	✓				MTT
Improve the image and professionalism of tourism service providers by initiating an image campaign to attract and retain capable new entrants.	✓				MTT
Encourage young people to relocate to work on new tourism establishments on the Outer Islands.	✓				MTT
Include tourism as a subject in the school curriculum at all levels - primary, secondary and post-secondary.			✓		MOE
Formulate a comprehensive and detailed education and training plan with the aim of creating a Pool of Seychellois Middle-Managers.		✓			MTT
Review existing training incentives and if necessary, modify or introduce new ones to increase the incidence of training for the tourism workforce.	✓				MTT
Encourage individual hotels and tour and travel agencies to continue to enhance existing in-house training programmes, and also encourage other types of tourism enterprises such as diving and boating operations to upgrade their own training programmes.	✓				MTT
Develop a comprehensive training programme to emphasise productivity and service quality.		✓			MTT
Address the problem of attracting and retaining qualified Seychellois through the development of incentive linked productivity and performance improvement measures		✓			MTT
Develop and implement initiatives to promote a culture of quality service throughout the tourism industry, and among the population at large.	✓				MTT
Reinvigorate the U-First Programme as one element of a strategy to sensitise the public on the importance of the tourism industry to the economy of the Seychelles and consequent importance of providing good service.		✓			MTT
Establish and continually update a Human Resource Database in order to develop effective Human Resource Development Programmes geared to the individual needs of the workforce and the changing needs of the industry.		✓			MSAE
Increase efforts at eliminating gender stereotyping within the tourism industry.	✓				MTT
Strengthen institutional framework for the development of human resources in the tourism sector.	✓				MTT
Continue the localization programme.	✓				MTT

RECOMMENDED ACTION	IMPLEMENTATION PERIOD				Lead Agency
	Ongoing/ Continuous	Within 1 Year	Within 5 Years	Within 10 Years	
INTEGRATING TOURISM FOR ENVIRONMENTAL SUSTAINABILITY					
Expand and improve the management of protected areas and strengthen the enforcement of legislation.	✓				MOE
Implement the relevant components of the Environmental Management Plan for Seychelles (EMPS) 2000-2010.				✓	MOE
Implement the relevant components of the National Biodiversity Strategy and Action Plan.				✓	MOE
Undertake control measures to mitigate environmental impacts from tourism development, including measures to address impacts on both the land and marine environment as a result of physical alterations and habitat damage.	✓				MOE
Continue to implement existing guidelines to control tourism development in coastal areas (including the Coastal Zone Management Programme and Marine Resources Management Programme) and develop additional legislation wherever appropriate.	✓				MOE
Subject further development of tourism infrastructure to comprehensive planning procedures and controls with the aim of meeting standards and ensuring minimal environmental impact and sustainability.	✓				MOE
Subject all tourism projects to environmental authorisation and an environmental impact assessment.	✓				MOE
Integrate Vision 21 with the new national land use and development area plans so that there is no conflict of tourism land use patterns and that the two plans reflect the same tourism development policy and strategy.	✓				MTT
Establish a comprehensive set of standards and design guidelines for tourist facility site planning, including standards relating to carrying capacity and landscape plans.			✓		MTT
Establish a separate set of development standards and guidelines for eco-lodges.		✓			MTT
Generally improve infrastructure to meet the projected expansion of the tourism industry, including improvements to road and sea transportation, water supply, electric power, sewage and solid waste and telecommunications.				✓	MTT
Encourage the amelioration of public bus services on Mahé and Praslin, with particular attention given to providing better information on routes and services.	✓				SPTC
Extend specialised training to taxi operators in order to improve customer service	✓				MTT
Encourage the establishment of a centralized call service for taxis.			✓		MTT
Establish a taxi depot to serve South and West Mahé, similar to the one located in central Victoria.			✓		MTT
Improve rental car services, and establish appropriate quality and safety standards that must be met by all operators.	✓				Tourism Standards Board
Improve maintenance of rental bicycles, particularly where they are widely used by tourists, as on La Digue, and to a lesser extent on Praslin.	✓				

RECOMMENDED ACTION	IMPLEMENTATION PERIOD				Lead Agency
	Ongoing/ Continuous	Within 1 Year	Within 5 Years	Within 10 Years	
INTEGRATING TOURISM FOR ENVIRONMENTAL SUSTAINABILITY					
Monitor provision of boat ferry services to ensure that demand is adequately met.	✓				MTT
Implement the East Coast Phase III Project to provide improved harbour facilities at Port Victoria, including better docking and other facilities for cruise ships				✓	MoF
Implement new projects to augment water supply to meet projected increased demands from new tourism development, and also implement water conservation measures.				✓	PUC
Explore potential means for meeting increased water demand from tourism development on Praslin and La Digue, including utilisation of additional groundwater resources and desalination.				✓	PUC
Consider the development of desalination plants on Outer Islands where tourism development will require augmenting water supply.				✓	PUC
Continually review electric power generating capacity to meet projected needs of tourism development, with future emphasis placed on the development of solar energy wherever feasible to supplement power supplies generated by conventional means.	✓				PUC
Expand the Victoria Sewage System to mitigate port pollution.			✓		PUC
Implement the new sewerage system for the Beau Vallon area, to which all hotels and other substantial developments must connect			✓		PUC
Conduct a feasibility study on developing a central sewerage system for the Cote D'Or area on Praslin and, if determined to be feasible, the system developed.			✓		PUC
Require all new tourism developments of larger and medium size on Mahé, Praslin and La Digue, and on the other islands, to provide their own sewage treatment plants, while small enterprises must construct septic tanks. These facilities will be monitored to ensure that they are properly maintained and meet the pollution control standards of the Ministry of Environment.	✓				MOE
Establishment of a waste treatment facility at L'Amitie, Praslin, as a matter of priority.			✓		MOE
Develop facilities for disposal of waste oil and sewage from boats and ships, and in the meantime ensure that ship-generated garbage is disinfected before it is transported to landfill sites.			✓		MOE
Encourage tourism enterprises to assume a proactive role in promoting the protection and conservation of the natural environment, including adoption of alternative sources of energy, conserving electrical energy, applying water conservation and recycling techniques, minimizing production of solid waste material, and eliminating the use of detergents containing phosphorous compounds.	✓				MTT

RECOMMENDED ACTION	IMPLEMENTATION PERIOD				Lead Agency
	Ongoing/ Continuous	Within 1 Year	Within 5 Years	Within 10 Years	
INTEGRATING TOURISM FOR ENVIRONMENTAL SUSTAINABILITY					
Encourage tourism enterprises to distribute codes of environmental conduct when tourists are using the marine environment and visiting protected land areas or parks and reserves, and tour guides to include the codes of conduct in their presentations.	✓				MOE
Encourage tourism enterprises to apply green establishment programmes.	✓				MTT
WORKING TOGETHER FOR SUCCESS					
Generate a broad national partnership between different government ministries and departments and other agencies, and between government and the private sector and civil society, in order to ensure the successful implementation of Vision 21	✓				MTT
Promote close collaboration between government ministries and agencies and the private sector to formulate synchronised policies and a favourable business climate conducive to the development of a consistent and high quality tourism product.	✓				MTT
Promote and develop government-to-government cooperation in the field of tourism, both at the bilateral level and through participation in international and regional tourism organizations.	✓				MTT
Promote a process of consultation between different government ministries and agencies in the implementation of Vision 21	✓				MTT
Advocate partnership and collaboration between the various tourism enterprise associations representing all sectors of the tourism-related industry.	✓				MTT
Promote partnership between public and private sectors, recognising that while government will provide the direction, policy and regulatory environment to support the realisation of VISION 21, it is the private sector that will make the vision a reality through its investments in the industry.	✓				MTT
Promote broad partnerships between the tourism industry and civil society in order to promote a greater understanding, acceptance and support for the tourism industry.	✓				MTT
PROMOTING THE VISION					
Formulate and implement a marketing strategy & promotion programme.	✓				STMA
Promote Vision 21 at all levels in order that all stakeholders, including the public and private sectors and individuals, understand the importance of a national partnership in the tourism industry and that all have a part to play in its implementation.	✓				MTT