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VI TOURISM INVESTMENT AND BUSINESS FORUM FOR AFRICA

FINAL REPORT



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1. Introduction

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

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

The registration for the Forum was launched in October 2014 and closed in January 2015, (deadline extended to maximize registration). Invitations were sent to the Ministers of Tourism of the different countries from all regions of the world, who were also invited to disseminate the information widely among private-sector tourism companies and associations as well as investment and business promotion agencies in their respective countries, and to encourage their participation. Senior officials from African regional organizations as well as associations of Spanish companies also received letters of invitation. The associations of Spanish companies were specifically requested to disseminate this information to their members, i.e. the Spanish private tourism sector and others branches of the economy, given the transversal nature of tourism compared to other sectors.

From FITUR, invitations were sent to all exhibitors, companies and contacts of their database. Casa África did the same, in addition to the follow-up with Spanish embassies in Africa to encourage authorities in different countries to take part in INVESTOUR. FITUR and UNWTO also held meetings with officials of the Spanish Confederation of Employers' Organizations (CEOE) and the Chamber of Commerce of Madrid to seek their collaboration to encourage their member companies to take this opportunity to meet with the African project leaders.

INVESTOUR has once again demonstrated its legitimacy with the public and private sector as a strategic platform for the development of African tourism at FITUR. Indeed, FITUR is one of the world's most important tourism fairs, and in its context, INVESTOUR serves as an excellent showcase for African tourism. Although they could not all be present, for various reasons, it is important to note that almost 450 people registered, demonstrating that this meeting has created, along the way, a legitimate expectation on operators interested by African tourism.

The Spanish Government used this opportunity to symbolize a step forward in its line of cooperation with Africa in this edition, with the participation of three of its major figures. H.E. Mr. José Manuel Soria López, the Minister of Industry, Energy and Tourism officially opened the Forum whilst the Secretary of State for Tourism, H.E. Mrs. Isabel Borrego Cortés, was in

attendance and formally closed the Forum. H.E. Mr. Ignacio Rubio Ybañez, the Secretary of State for Foreign Affairs also graced us with his presence at the event.

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

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

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

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

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

This report presents, in detail, the activities of this one day forum, the discussions held during the two round tables, the analysis of participation data and the results of the grade of satisfaction survey to participants.

¹ International Air Transport Association

2. First Session

The first session of INVESTOUR took place from 9:00 am to 13:15 p.m. in the twin rooms 107 and 108 of the North Convention and Congress Center of IFEMA. The reception of credentials and in situ registrations started at 09:00 am.

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

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

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

2.1. Opening ceremony

The opening ceremony started with the welcome address of Elcia Grandcourt, the UNWTO Regional Director for Africa, who had the honor to serve as master of ceremony for the event. She introduced and invited the following speakers for their opening remarks; Mr. Luis Padrón, General Director of Casa África, Mr. Luis Eduardo Cortés, Chairman of the IFEMA² Executive

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

Committee, H.E. Mr. Taleb Rifai, Secretary General of UNWTO and finally invited H.E. Mr. José Manuel Soria López, the Spanish Minister of Industry, Energy and Tourism to officially launch open the forum.

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

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

M. Luis Padron took this opportunity to specially thank and congratulate the Minister of Industry, Energy and Tourism of the Spanish Government for the record of 65 million international tourist arrivals in Spain in 2014. This demonstrates Spain as a major force in tourism, not only for this spectacular figure of visitors, but also for the know-how, the experience and the potency of its companies that appear to be world leaders and a reference worldwide. Meanwhile, the General Director of Casa África proclaimed the growing and promising trend of the statistics of international tourists visiting Africa and was convinced that the cooperation and "know-how" of Spanish companies can be a genuine revolution and a great support to the implementation of major joint projects. In addition, the elimination of conflict zones is an element to enhance the attractiveness for visitors, while relying on a necessary regional integration and the promotion of inclusive public policies. So, we have the right to be optimistic, he said.

According to Mr. Luis Padrón, the foreign investment in Africa, fifteen years ago, was the monopoly of Western powers. Today, other actors such as China, India, Brazil, Turkey and others have entered the scene. But to ensure proper growth of the foreign direct investment (FDI), it is necessary to pursue a real implementation of specific ways to stimulate investment in the tourism sector through two fundamental areas: reducing bureaucracy and increase legal certainty for investment. He concluded his thought by emphasizing that the reason for the success or failure is summarized in two concepts: good governance and decision making.

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

After the intervention of the Director General of Casa África, it was the turn of Mr. Luis Eduardo Cortés, Chairman of the Executive Committee of IFEMA who first raised that tourism is one of the most important economic activities in the world. Then, speaking of tourism in Spain, he referred to the different forms of tourism developed here: health tourism, business tourism, cultural tourism and shopping tourism. According to Mr. Cortés, Spain hosted last year more than 65 million tourists, which made the country one of the tourist world powers. But it's very important to underline that this is only the fruit of the good job done by the country.

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

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

Despite the three major challenges that African continent faced in 2014, namely, the Ebola virus disease, its impact on tourism expenditures (receipts) on the economic plan and finally, the problematic of insecurity, the Secretary General of UNWTO acclaimed Africa for the number of international tourists received, a number that continues to grow and whose projections are even more encouraging. But Africa needs the support of all and to support this region is a necessity and a human responsibility, he claimed.

Returning to the programme of the Forum and concretely roundtables, H.E. Mr. Taleb Rifai concluded by highlighting a few key points that should be taken into account: the problem of project financing and infrastructure or else the lack of investment in the region, air connectivity, travel and visa facilitation, the delay in the use of modern technologies and finally delays in marketing services to provide a real image of Africa.

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

Subsequently, the Minister Soria stressed that for many years we have been hearing that Africa is the continent of the future. But, "That future is already here. This future is the present moment", he said. Africa is as a set of countries and companies full of opportunities not only for African, but also for the rest of the world. It is true that there are limitations, weaknesses, imbalances, evident and unacceptable levels of poverty, hunger, conflicts, but all of these are obstacles that we all have to break. However, in Africa, there are economies with growth rates above 5%, 6% or 7%; there are economies where income levels are available in full growth; there is a young population willing to work, with a dream, a project, and this is the greatest strength of Africa, not to mention

its various minerals and hydrocarbons, etc. Minister Soria conveyed the message that under the leadership of the Government of Mariano Rajoy, Spain wants and is willing to provide African countries all the experience it has accumulated over the past 60 years in the development of tourism.

Minister Soria before declaring INVESTOUR officially opened reminded the audience that the relationship between Spain and Africa is fraternal and sincere. He has for this purpose reassured his African counterparts that, since 1 January 2015, Spain is a non-permanent member of the UN Security Council and is willing to work in favor of anything that can contribute to stability, peace, democracy and institution building in African countries.

2.2. First round table

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

As panelists were:

- H.E. Mrs. Naha Mint Hamdi Ould Mouknass, Minister of Trade, Industry, Handicraft and Tourism, Mauritania
- Mrs. Nada Roudies, Permanent Secretary, Ministry of Tourism, Morocco
- H.E. M. Abdoulaye Diouf Sarr, Minister of Tourism and Air Transport, Senegal
- Mr. Alfonso Seoane Yarza, Director of Strategy and Business Planning, Spain's School for Industrial Organization (EOI)
- Mr. Victor de Barrena Sarobe, Director, IATA Training and Development Institute
- Mr. Juan Ramsden, Coordinator General, Binter Canarias, Spain

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

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

HE Mrs. Naha Mint Hamdi Ould Mouknass first noted that human capital is a topical issue in the world because it is true that the professionals in tourism industry, as in other sectors, should have the best skills and the best qualifications. In Africa, everyone is aware of the importance of the tourism sector. This is why tourism deserves full recognition for its economies. In Mauritania for example, from 1996 to 2000, tourism has been in a tremendous growth and the poverty rate decreased from 50% to 23%. She also reminded the UNWTO data on tourism demand in Africa: the number of international tourists visiting Africa increased from 26 million in 2000 to 56 million in 2014. These data are encouraging but it is clear that the distribution is very uneven, the North

and South of the continent enjoying the good majority of these arrivals, while the rest of the region benefits from very little. According to the Mauritanian Minister, the human capital deficit has a big responsibility for this failure and the poor distribution. It is true that there is a wide variation between the countries in terms of policy and in terms of human capital, but it is also clear that there is an essential requirement of training and investment in human capital across the continent. H.E. Mrs. Naha Mint Hamdi Ould Mouknass also diagnosed the difficulties of African tourism, summarizing in:

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

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

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

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

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

The aviation sector is one of the most important in the tourism industry. It is in this sense that Mr. Victor de Barrena Sarobe, Director of IATA Training and Development Institute, acclaimed for his

brilliant speech, held to analyze the situation of human capital in relation to this sector in the African continent. He is the right person for this purpose, because 90% of the air traffic of passengers and goods are covered by IATA member airlines. The IATA Training and Development Institute has trained over 95,000 students in the world, including Africa. He then reviewed the most important aspects in the field of human capital in Africa.

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

The Director of IATA Training and Development Institute continued by proposing to develop in Africa a training policy in business administration and management. Indeed, the human capital must play a more vital role in business planning strategy, for the benefit of marketing plans and the development of the aviation sector in the region. Another component was also opened, to enhance the quality in training, creating training centers and centers of excellence to ensure consistency in training, international standards in aviation, as in other fields. The issue of funding is not left out, but the most important challenge that aviation will face over the next 20 years in Africa is none other than the shortage of skilled labor, pilots, engineers, technicians and others, given that most of them often move to other regions that offer many more opportunities, concluded Mr. de Barrena.

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

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

assets of the continent so that they are available in the region and with this method, the development of tourism in Africa is assured.

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

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

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

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

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

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

2.3. Second round table

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

- H.E. Mr. Walter Mzembi, Minister of Tourism and Hospitality Industry of Zimbabwe and Chairman of the UNWTO Commission for Africa
- H.E. Mr. Roger Kacou, Minister of Tourism, Côte d'Ivoire
- Mr. José Armando Duarte, President and CEO, Cabo Verde Investimentos
- Mr. Stéphane Durand, Managing Partner, Horwath HTL, France

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

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

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

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

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

oil, gold and other minerals. H.E. Mr. Walter Mzembe is convinced that Africa can be the center of attention around the world, if it is able to present in a positive way its natural resources.

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

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

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

Then it was the turn of Mr. Stéphane Durand, President of Horwath HTL, to speak. He developed two interesting ideas. First, tourism helps not only for the general economic development, but also for the attractiveness of countries. In the globalized world we are living in today, the countries that will have good tourism sector will be countries credible economically. This is for Mr. Durand, a big argument to attract talent, companies as have a real tourist economy.

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

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

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

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

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

H.E. Mr. Mohamed Abdelkreem El Had, Minister of Antiquities, Tourism and Wildlife of Sudan, supported the idea that African countries should work together more than ever, exchange know-how and experience. He proposed the countries of the region to be more focused on investment and especially those in the tourism sector. He therefore called on the African Development Bank to support more countries in this direction. Such appeal was also made to UNWTO and Spain. The Sudanese Minister highlighted that it should be interesting to have a real debate in Africa on the subject.

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

African destinations. In the same vein, Africa needs to perform in connectivity to be able to facilitate the movement of tourists arriving in the region.

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

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

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

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

Mrs. Marianne Michelet, Euronews Senior Account Director Africa, came back on the fact that the communication of African countries on international media is non-existent, with some exceptions like Morocco, South Africa and Cabo Verde. The eruption of Ebola did much damage to the image of Africa but we did not see African countries communicating on it. According to Mrs. Michelet, African countries must not allow international media to communicate on their behalf. She then asked if the UNWTO had a policy to help and support these countries in their communication in tourism.

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

Hon. Mzembi recognized the relevance of the points mentioned above. He then confirmed that without statistics, it is not even possible for a minister of tourism to convince his colleagues in the government of the importance of his portfolio. The solution of the Tourism Satellite Account proposed by the UNWTO is an appropriate way forward and the governments should invest in the statistics. Another vital element is planning. Hon. Mzembi emphasized the fact that very few African countries had a Tourism Development Master Plan and many others are working on it

now. In addition, there is no law or statement that affects a certain percentage of the fiscal budget of African countries to tourism development. Yet it is clear that if we do not invest in tourism, we cannot collect enough from that sector. Zimbabwean Minister proposes a discussion at the summit with heads of state and finance ministers to build on this important point. Another important factor is the "war of perception". Hon. Mzembe regretted the frantic taste of African media to amplify the negative information and stereotypes about Africa. African people and their media are themselves the perpetrators of bad information on Africa. This is a war to win in African editorials because we now live in a globalized world where all information published in Africa runs as fast and is recovered few seconds later by other media anywhere in the world.

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

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

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

2.4. Closing remarks

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

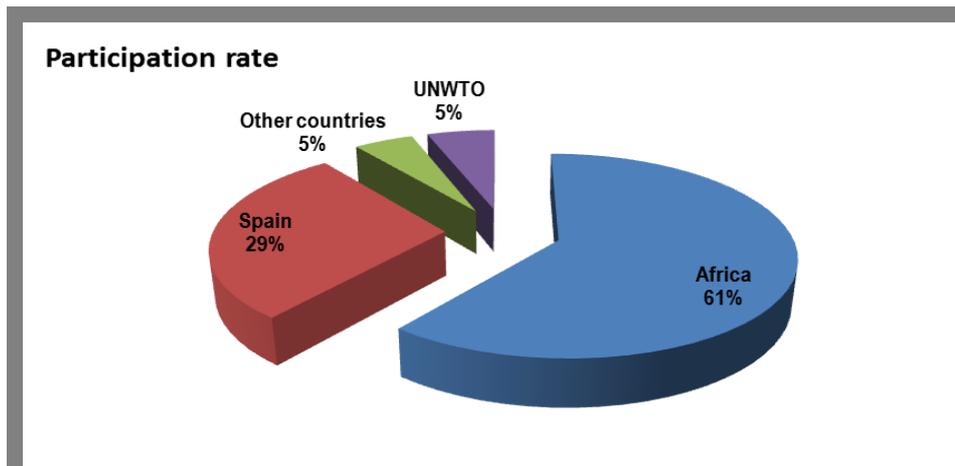
Having extolled the qualities of the Spanish tourism sector, the Secretary of State urged all participants to take advantage of this opportunity, INVESTOUR and FITUR, to make contacts with many companies willing to develop their activities, create new products and improve the management of tourist destinations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

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

2.5. Participation data

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

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



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

VI Tourism Investment and Business Forum for Africa

N°	Origin	Number of Participants
1	Algeria	2
2	Angola	1
3	Benin	9
4	Burkina Faso	2
5	Cabo Verde	4
6	Cameroon	4
7	Chine	1
8	Congo	1
9	Côte d'Ivoire	7
10	France	3
11	Gambia	5
12	Ghana	11
13	Guinea	3
14	Guinea-Bissau	8
15	Iraq	1
16	Jordan	1
17	Kenya	2
18	Lebanon	1
19	Mali	3
20	Morocco	8
21	Mauritania	4
22	Mexico	1
23	Mozambique	11
24	Namibia	3
25	Niger	22
26	Poland	1
27	RDC	16
28	Rwanda	3
29	Senegal	18
30	Seychelles	2
31	Soudan	1
32	Suisse	1
33	RSA	7
34	Spain	88
35	Tanzania	5
36	Chad	2
37	Togo	3
38	Tunisia	1
39	UK	4
40	USA	1
41	Zambia	15
42	Zimbabwe	3
Sub-total		289
UNWTO		17
TOTAL		306

2.6. Grade of satisfaction survey

A satisfaction survey of participants on the forum was conducted. Respondents to the survey were as many delegates from African countries, Spain and other countries represented. Some questionnaires were completed on site and delivered to the organizers and much was sent online by those who could not complete on the day of the Forum. In the end, the number of collected questionnaires is satisfactory and total respondents proved to be a reliable and representative sample of the population of those who participated in the Forum.

The percentage distribution on the assessment of the first session is shown in the table below:

	 Not Satisfied or Very Poor	 Neither Satisfied nor Not Satisfied or Poor	 Slightly Satisfied or Average	 Satisfied or Good	 Greatly Satisfied or Very Good
Satisfaction	0%	0%	22%	56%	22%

As can be seen, 78% of respondents to our survey were satisfied or very satisfied with the first session, while 22% were moderately appreciated. Overall, we can say that the first session was a success according to participants.

When asked which topics of the roundtable they found more interesting, we have a total approval, which means that the participants were in perfect agreement with the choice of these themes. And that obviously confirms the result of the table above. However, some participants would have liked the following topics to be discussed:

- Development of new tourism products and projects;
- Good practice in the creation of sustainable tourism products;
- The promotion and responsible exploitation of natural resources.

It is also recommended that in such meetings, we could talk and debate on single or common visa in different regions of the continent. The continent's Tourism Ministers are specially arraigned on this subject, because for many delegates, liberalize movements border is certainly beneficial to the development of tourism in Africa like it's the case in the European Union. Participants would like these decision-makers and senior officials finally have a common vision on this important topic.

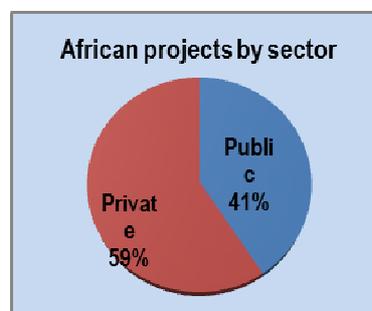
3. Second Session

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

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

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

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



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

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

4. Opinion on technical aspects and overall appreciation

The opinions expressed by respondents about the technical aspects of the organization are represented as follows:

	 Not Satisfied or Very Poor	 Neither Satisfied nor Not Satisfied or Poor	 Slightly Satisfied or Average	 Satisfied or Good	 Greatly Satisfied or Very Good
Registration process	0%	0%	20%	50%	30%
Documents received	0%	0%	40%	20%	40%
Online Information	0%	0%	40%	30%	30%
Attention received at the Forum	0%	0%	20%	40%	40%
Forum venue	0%	0%	20%	30%	50%
Sign posting	0%	10%	20%	50%	20%
Catering service	20%	20%	10%	30%	20%

And as we can see, the participants were particularly satisfied with the following points: registration process, documents received, online information and sign posting. A special mention goes to the attention received during the Forum with 40% satisfied and 40% very very satisfied. The Forum venue is also approved with 50% of participants very satisfied.

In contrast, the catering service collected more than 40% of participants who did not appreciate or not having clearly expressed a favorable opinion, while 50% are satisfied. Critics done clearly involve the cocktail format used at lunch time, specifically on the quality of the menu served. In addition, a number of Spanish respondents emphasized that a B2B session with payment of 100 euros should include a WIFI internet connection.

Participants were also asked to evaluate the Forum as a whole and the result is shown in the table below:

	 Not Satisfied or Very Poor	 Neither Satisfied nor Not Satisfied or Poor	 Slightly Satisfied or Average	 Satisfied or Good	 Greatly Satisfied or Very Good
Overall appreciation	0%	0%	0%	67%	33%

It can therefore be concluded that INVESTOUR was successful, 100% of respondents who appreciated favorably or very favorably.

However, the following suggestions were made for future editions:

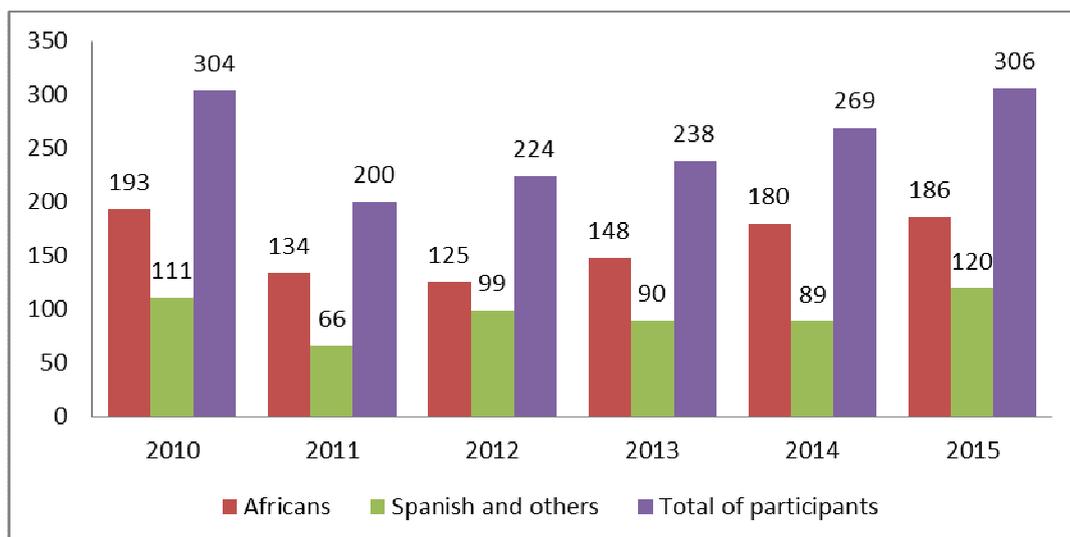
- Further improve the sign posting;
- Respect the timing and the rotation of the tables during the B2B session;
- Discuss about good tourism practices in participating countries.

5. Comparative of various editions participation

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

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

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



6. Annex

6.1. Technical Secretariat Datasheet

Denomination:

Tourism Investment and Business Forum for Africa (INVESTOUR)

Foro de Inversiones y Negocios Turísticos en África (INVESTOUR)

Forum touristique sur les investissements et les opportunités d'affaires en Afrique (INVESTOUR)

Date: January 29, 2015, from 9h00 to 19h30

Location: North Convention Centre, Madrid's International Fair (IFEMA)

Participants:

Pre-Registration in the morning session: 450 people

Participants in the morning session: 306 people

Pre-Registration in the B2B session: 157 organizations

Participants in the B2B session: 40 organizations

Number of African countries in the Forum: 31

African Ministers: 12

African Secretary of State: 1

The Middle East Ministers: 2

Spanish Minister: 1

Spanish Secretaries of State: 2

6.2. Steering Committee

	Luis Padrón Director-General
	Ana Cárdenes Head of Economy and Enterprise
	Liv Tralla , Jefa del Área Institucional
	Joan Tussel Prats , Jefe de Área de Medios de Comunicación
	Mario Muñoz Fernández , Área web y mediateca online
	Yurena Ojeda , Técnico del Área de Economía y Empresa
	Ana Larrañaga Director
	Lourdes Sierra Commercial Manager International Area
	Ana Mucientes
	Carlos Vogeler Director – Executive Secretary for Members Relations
	Elcia Grandcourt Director, Regional Programme for Africa
	Hélder Tomás Deputy-Director, Regional Programme for Africa
	Lydia Bebe Sackey Senior Programme Assistant, Regional Programme for Africa
	Rita Bele-Zongodono , Collaborator, Regional Programme for Africa
	Pablo De La Joya Escobar , Technician
	Jeannot Michel Abessolo , Consultant

6.3. Programme



Sponsor **Binter**

TOURISM INVESTMENT AND BUSINESS FORUM FOR AFRICA

FITUR (IFEMA), Madrid, Spain, 29 January 2015

PROGRAMME

First session (09.00 – 13.15), North Convention and Congress Center, Rooms 107-108

09.00 – 10.00 Registration

10.00 – 10.30

- Official photo
- Opening ceremony
- Mrs. Elcia Grandcourt Programme Director, UNWTO Regional Programme for Africa, (Master of Ceremony)
- Mr. Luis Padrón, Director-General, Casa África
- Mr. Luis Eduardo Cortés, Chairman of the IFEMA Executive Committee
- H.E. Mr. Taleb Rifai, UNWTO Secretary-General

Official Opening:

H.E. Mr. José Manuel Soria López, Minister of Industry, Energy and Tourism, Spain

- **Signature of the cooperation agreement between UNWTO and Casa África for the elaboration of the Report on Africa Tourism**

10.30 – 11.45 Roundtable 1: Investing in Human Capital

By placing tourism as a high priority on their agendas, African Governments have considerably contributed to the improvement of both infrastructure and communications. To further increase the competitiveness of tourism in Africa, stakeholders from both public and private sectors need to focus their efforts on enhancing the quality of the service provided to the tourists, often one of the major benefits of foreign direct investment in the sector.

Moderator: Mr. Steve Kayizzi-Mugerwa, Acting Chief Economist, African Development Bank

Panelists:

- H.E. Mrs. Naha Mint Hamdi Ould Mouknass, Minister of Trade, Industry, Handicraft and Tourism, Mauritania
- Mrs. Nada Roudies, Permanent Secretary, Ministry of Tourism, Morocco
- H.E. M. Abdoulaye Diouf Sarr, Minister of Tourism and Air Transport, Senegal
- Mr. Alfonso Seoane Yarza, Director of Strategy and Business Planning, Spain's School for Industrial Organization (EOI)

- Mr. Victor de Barrena Sarobe, Director, IATA Training and Development Institute
- Mr. Juan Ramsden, Coordinator General, Binter Canarias, Spain

Debate

11.45 – 13.00 Roundtable 2: The impact of Africa's Image on Foreign Direct Investment (FDI) in Tourism : Situation and Trends

Whilst there is an accelerated economic expansion in the region and the potential of Africa's tourism resources are undeniable, the image of the continent still faces important challenges. Africa is also attracting a growing level of investment, yet the majority of FDI in Africa continues to flow to the oil, gas and mining sectors. Is tourism investment in the region affected by the image and perception of Africa?

Moderator: Mr. Rafael Gomez-Jordana Moya, Director Africa Area, Banco Santander, Spain

Panelists:

- H.E. Mr. Walter Mzembi, Minister of Tourism and Hospitality Industry, Chairman of the UNWTO Commission for Africa, Zimbabwe
- H.E. Mr. Roger Kacou, Minister of Tourism, Côte d'Ivoire
- Mr. José Armando Duarte, President and CEO, Cabo Verde Investimentos
- Mr. Stéphane Durand, Managing Partner, Horwath HTL, France

Debate

13.00 – 13.15 Closing remarks: H. E. Mrs. Isabel Borrego Cortés, Secretary of State for Tourism, Spain

13.30 – 15.00 Cocktail offered by INVESTOUR to the participants (North Convention and Congress Center, Room Neptuno, Second Floor)

13.45 – 15.00 Luncheon for the African and the Middle East Tourism Ministers offered by IFEMA and UNWTO (North Convention and Congress Center, Room Colon, Second Floor) – *Invitation only*

Second session (15.00-19.30), North Convention and Congress Center, Rooms 105-106

15.00 – 16.00 Registration

16.00 – 19.30 Meetings B2B (Business to Business)

*Each participant will be provided with a previously arranged agenda of appointments on the basis of the information provided in the registration form or online platform. All participants must have their own necessary logistic material in order to guarantee a successful meeting (Laptop, leaflets, catalogs, etc....).

N.B.: Participants are informed that there will be no technical assistance available such as computers with printers, photocopier, fax, scanner, internet, nor translation.

6.4. Profile of the Panelists

Roundtable 1: Investing in Human Capital

Moderator: *Mr. Steve Kayizzi-Mugerwa, Acting Chief Economist and Vice President of the African Development Bank Group*

Panelists:

H.E. Mrs. Naha Mint Hamdi Ould Mouknass, Minister of Trade, Industry, Handicraft and Tourism, Mauritania

Mrs. Nada Roudies, Permanent Secretary, Ministry of Tourism, Morocco

H.E. M. Abdoulaye Diouf Sarr, Minister of Tourism and Air Transport, Senegal

Mr. Minister of Tourism and Air Transport Abdoulaye Diouf Sarr is an economist, financial expert and Senegalese politics.

He holds a degree from the University of Lyon and another in financial institutions and corporate finance, obtained at Léopold Sédar Senghor University of Excellence of Alexandria, Egypt.

Having integrated SNHLM, he has been successively Director of sales and purchases and CFO.

After that, he directed the Support Unit for Local Elected in the City Hall of Dakar for a year and a half.

Mr. Abdoulaye Sarr Diouf was also Secretary General of the Chamber of Commerce of Dakar before exercising the same function in Kaolack.

He also held the position of Chief Administrative and Financial Officer of SATAR and that of Deputy Director General of the New Mining Company and Public Works (NSMTP).

In April 2012, Abdoulaye Sarr Diouf was appointed Director of the Centre des œuvres universitaires of Dakar (COUD).

In July 2014, he entered the government as Minister of Tourism and Air transport of Senegal, with a primary mission to reposition the Senegalese Tourism, in the context PSE implementation.

Abdoulaye Diouf Sarr is the Mayor of Yoff, a municipality of the Senegalese capital Dakar.

Mr. Alfonso Seoane Yarza, Director of Strategy and Business Planning, Spain's School for Industrial Organization (EOI)

D. Alfonso Seoane Yarza has a degree in Law from the University of Deusto and he specialized in Corporate Lawyer in ICADE of Madrid.

He has over 20 years' experience in the tourism sector, highlighting as Director General of Viajes Marsans, **first Director of FITUR**, the first Director of the Municipal Board of Tourist of the City of Madrid and Chairman in Spain of the Confederation of Latin American Tourism Organizations (COTAL).

Mr. Seoane has been a Director of several leading companies of Tourism in Spain, has been President of ISLA MÁGICA, the theme park of Seville, Chairman of the Local Organizing Committee of Eurobasket 2007 and is a regular collaborator as Expert in Tourism of Inter-American Development Bank (BID).

It has a great knowledge of the African continent, having recently participated in projects like Coemprende program: Entrepreneurship in Africa, which took place in Morocco, Senegal and Cape Verde.

D. Alfonso Seoane is in possession of the Medal for Merit in Tourism by the Government of Spain and is now Director of Strategy and Business Planning at the Spain's School for Industrial Organization, part of the Ministry of Industry, Energy and Tourism of the Government of Spain.

Mr. Victor de Barrena Sarobe, Director, IATA Training and Development Institute

As the director of the IATA Training and Development Institute (ITDI), Victor brings over 25 years of aviation experience. Well versed in airport and airline operations, he had various assignments with United and Star Alliance. Victor held project management assignments in various IATA global StB projects in Europe and the Americas, participating in the E-Ticketing global implementation project, as well as e-Freight and other industry projects. He later led the Airport Council International Global Training organization and Human Resources department in Geneva, Switzerland.

Victor is a graduate in International Relations from San Francisco State University, and has studied behavioral sciences and coaching. He is originally from Spain and currently lives in Geneva, Switzerland.

Mr. Juan Ramsden, Coordinator General, Binter Canarias, Spain

Mr. Juan Ramsden is the Coordinator General of Binter, airline that has 26 years of history and in recent times has made a significant international expansion, especially in West Africa, where they fly to 9 destinations. Binter was named Airline of the Year 2013 - 2014 by the ERA (European Regions Airlines Association), the fifth time this organism granted its highest award to this airline.

Roundtable 2: The impact of Africa's Image on Foreign Direct Investment (FDI) in Tourism: Situation and Trends

Moderator: *Mr. Rafael Gomez-Jordana Moya, Director Africa Area, Banco Santander, Spain*

Actually

Executive Manager for Africa at the African Desk of **Banco Santander**

- Doctorate in Law by the University Complutense of Madrid (CEU)
- Master on Foreign Relations & Trade and International Law by Instituto Superior de Derecho y Economía in Madrid
- Master in Corporate Diplomacy and Public Affairs by Schiller International University

With international missions abroad as:

- Head of Trade and IFI's in **Attijari bank**, Tunisia
- Representative Officer of **Banco Santander** in Colombia
- General manager for **Société Generale de Surveillance** in Panama and different posts as Liaison Officer in Paraguay, Ecuador, Guatemala

Author of some publications as:

- **Sub-Saharan Africa: A space of opportunities for the Spanish companies** (Economía y Comercio Internacional / Programa de Energía, Documento de Trabajo 1/2013 Real Instituto el Cano)
- **Spain a new look over AFRICA** (Documento de trabajo 2/ publicado en Casa África e Iberglobal 2014)
- **An approach to infrastructures in Sub-Saharan Africa** (Documento de trabajo /3 publicado en Casa África Iberglobal Atalayar y África Infomarket 2014)
- **BRICS countries and África** (4 Documento de trabajo publicado en Casa África, Iberglobal, Atalayar y CEOE. 2014)

Panelists:

H.E. Mr. Walter Mzembi, Minister of Tourism and Hospitality Industry of Zimbabwe and Chairman of the UNWTO Commission for Africa

Minister of Tourism since 2009, Mr. Mzembi played a very significant role in the organizing of the UNWTO co-hosted by Zimbabwe and Zambia in August 2013. He thinks that Africa is a land of opportunities and encourages investors to explore its economic potential. One of its goals at the Ministry is to increase the tourist arrivals to the continent in the next coming years. Mr. Mzembi finds very important to improve two key issues in the continent regarding tourism: air connectivity and visa facilitation outside and inside Africa.

H.E. Mr. Roger Kacou, Minister of Tourism, Côte d'Ivoire

Married with four children, Roger KACOU is the Minister of Tourism of Côte d'Ivoire since 22 November 2012. He holds a "Master of Professional Studies" at the School of Hotel Administration of Cornell University, Ithaca, New York, a Master of Science and Applied Economics at the University of Abidjan and a BS in Economics from the University of Abidjan.

Before his appointment, he served as below:

- September 2010: Senior Vice President for Africa of the Chain MOVENPICK Hotels and Resorts
- July 2008-June 2010: Vice President of Hotel and Leisure Development of Blue City Company in Oman, where he was responsible for three hotels and a golf club in Al Madina A'Zarqa

- From 2003 to 2008, he was Director of Operations in Africa, Director General of Intercontinental Nairobi (Kenya) in charge of operations in Libreville, Asmara and Lusaka.

- From July 1999 to June 2003, he was Vice President of Operations - East Africa Intercontinental Group.

- He was from 1982 to 1984, Chief of the Hotel Ivoire Intercontinental Abidjan, from 1984 to 1988, Director General of Golf Hotel Intercontinental in Abidjan, and from 1988 to 1991, Director General of the Hotel Ivoire Intercontinental and Regional Director of Operations for Côte d'Ivoire.

The Minister KACOU Roger received the following awards:

- Commander of the National Order of Côte d'Ivoire
- Officer of the National Order of Côte d'Ivoire
- Officer of Wissam Alaouite of Morocco
- Knight of the Order of Merit of Côte d'Ivoire,
- Medal of Honor Labour, Côte d'Ivoire
- Vice President of Africa Travel Association (ATA)

He speaks French, English (fluent) and Spanish (moderately).

Mr. José Armando Duarte, Ambassador, President and CEO, Cabo Verde Investimentos

Ambassador José Armando Duarte is a career diplomat of the Cape Verdean Diplomatic Services, having served in the Cabinet as Minister of Tourism, Trade and Energy (2001-2002); and as Ambassador Extraordinary and Plenipotentiary of Cape Verde in Angola (1999-2001) and in France (2003-2011). During his post in France he also served as Permanent Delegate of Cape Verde at UNESCO and as special representative of Cape Verde in the OECD Development Centre.

He is currently the Non-resident Ambassador of Cape Verde in Kuwait, Qatar and UAE.

Ambassador Duarte has 59 years old and 33 years of diplomatic and international experience having represented Cape Verde in several missions and fora at bilateral and multilateral levels.

Since 2011 he is acting as President and CEO of the Cape Verdean Investment Promotion Agency based in Praia/Cabo Verde.

Mr. Stéphane Durand, Managing Partner, Horwath HTL, France

Graduate in Economics and by the Institut d'Études Politiques in Paris, Stéphane Durand worked in the development and tourism and leisure projects for 15 years. After working with the Danone Group, he joined Détente Consultants where he was a consultant and later managing partner. He has conducted more than 500 missions of studies, consultancy and support:

- Projects in tourism, leisure and cultural in France and abroad
- Consulting study missions and support on marketing, economic and assembly

In early 2006 he created Horwath HTL France to develop its expertise at the service of a new business venture.

6.5. Registration form for African participants



**TOURISM INVESTMENT AND BUSINESS FORUM FOR AFRICA
(INVESTROUR)**

Madrid, Spain, 29 January 2015

REGISTRATION FORM

PLEASE NOTE THAT THIS REGISTRATION FORM MUST BE FULLY FILLED IN. REGISTRATION WILL NOT TAKE PLACE UNLESS ALL THE REQUIRED INFORMATION IS GIVEN, INCLUDING THE PROJECT SECTION.

COMPANY / INSTITUTION INFORMATION		
Name of the company / Institution:		
Contact person / person travelling:		
Position:		
Nationality:		
Address:		
Country:	Tel: Mobile:	Fax:
E-mail:	Web:	
Year of incorporation / start-up:		
Sector: <input type="checkbox"/> National / Regional / Local Administration <input type="checkbox"/> Accommodation <input type="checkbox"/> Passenger Transport Services <input type="checkbox"/> Tour Operator / Travel Agency <input type="checkbox"/> Tourism Organization / Association <input type="checkbox"/> Destination Management Organization <input type="checkbox"/> Other Tourism Related Services (please specify) _____		
Sub-sector: <input type="checkbox"/> Travel Agent <input type="checkbox"/> National Tour Operator <input type="checkbox"/> Ecotourism enterprise or community based tourism organizers		
Market experience: <input type="checkbox"/> Local <input type="checkbox"/> Regional <input type="checkbox"/> International		
Number of tourists received per year (if applicable): Of those, number of international tourists per year: Guides (If applicable) : with Specific training and foreign language speaking (must justify with CV's or other certificates)		

Form of Ownership (must be at least 50% African) :

- Private Company
 - Listed in a stock market*
 - Joint venture with international partner*
 - Joint venture with national partner*
 - Single/family ownership*
- Public-Private Joint Venture
- Other (please specify) _____

Please complete this information accurately in order to fulfil your needs when arranging your meetings with Spanish companies

PROJECT / INITIATIVE
Designation of the Project / Initiative:
Description of the Project / Initiative:
Description of the desired cooperation:
International companies you would like to meet (if possible):

Strengths and advantages:
Estimated Investment in Euros (if applicable):
Forms of collaboration sought: <input type="checkbox"/> Joint Venture <input type="checkbox"/> Technology Transfer <input type="checkbox"/> Equipment Purchase <input type="checkbox"/> Sub-contracting <input type="checkbox"/> Market access <input type="checkbox"/> Other _____
Please, specify the activity(es) you would like to participate in: <input type="checkbox"/> Round Table (09:00-14:00) <input type="checkbox"/> B2B (15:00-19:30)

PREVIOUS EDITIONS OF INVESTOUR
Have you participated in the previous editions of INVESTOUR? : <input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, please share with us concrete examples of project that has materialized from the B2B meetings at past INVESTOUR

Please register by completing this form, and return it by e-mail or fax, NO LATER THAN 30 NOVEMBER 2014, to:

<p>INVESTOUR Secretariat World Tourism Organization (UNWTO) Tel: + 34 91 567 81 00 Fax: +34 91 571 37 33 Email: investour@unwto.org Online registration: http://investour2015.monooti.net/</p> <p>Websites: www.investour-africa.com</p>

6.6. Satisfaction survey – Questionnaire

Tourism Investment and Business Forum for Africa / Forum touristique sur les investissements et les opportunités d'affaires en Afrique Madrid (Spain), 29 January 2015 / Madrid (Espagne), 29 janvier 2015



Sponsor **Binter**

Grade of Satisfaction Probe /Niveau de satisfaction de L'enquête /Encuesta sobre el grado de satisfacción

	DEGREE OF SATISFACTION / NIVEAU DE SATISFACTION / GRADO DE SATISFACCIÓN
☹	Not Satisfied or Very Poor / Pas Satisfait ou Très pauvre / Nada satisfecho o muy deficiente
☺	Neither Satisfied nor not Satisfied or Poor / Ni Satisfait ni insatisfait ou pauvre / Ni satisfecho ni insatisfecho o deficiente
😊	Slightly Satisfied or Average / Légèrement satisfait ou moyennement satisfait / Moderadamente satisfecho o regular
☺	Satisfied or Good / Satisfait ou bien / Satisfecho o bien
👍	Greatly Satisfied or Very Good / Très satisfait ou très bien / Muy satisfecho o muy bien

ROUND TABLES/ TABLES RONDES/ MESAS REDONDAS



Degree of Satisfaction/ Niveau de satisfaction/ Grado de satisfacción

Topics / Thèmes/ Temas

In your opinion, which topics did you find more interesting? / Quels sont les thèmes qui vous semblent les plus intéressants? / ¿Qué temas le han parecido más interesantes?

Which topics should have been included in the programme? / À votre avis, quels sont les thèmes qui auraient dus l'être discutés dans le programme? / En su opinión, ¿qué temas deberían haberse incluido en el programa?

B2B



Degree of Satisfaction/ Niveau de satisfaction/ Grado de satisfacción

Meetings of the B2B session/ B2B Reencontres/ Encuentros B2B

Are you satisfied with the organization of the B2B meetings ? / Êtes-vous satisfait d'organisation de l'atelier et de vos rencontres? / ¿ Considera satisfactoria la organización de los B2B?

**TECHNICAL SECRETARIAT/ SECRÉTARIAT TECHNIQUE/
 SECRETARÍA TÉCNICA**



Degree of satisfaction / Niveau de satisfaction / Grado de satisfacción

Registration process/ Enregistrement/ Registro	<input type="checkbox"/>				
Documents received/ Documents reçus/ Documentación recibida	<input type="checkbox"/>				
Online Information/ Information en ligne / Información online	<input type="checkbox"/>				
Attention received at the Forum/ Attention reçue au Forum/ Atención recibida en el Foro	<input type="checkbox"/>				
Forum Venue / Lieu du forum / Lugar de celebración del Foro	<input type="checkbox"/>				
Sign posting / La signalétique / Señalización	<input type="checkbox"/>				
Catering Service / Service de restauration / Servicio de catering	<input type="checkbox"/>				

Was any kind of service that you missed? / Quel type d'attention ou service vous n'avez pas reçue? / Ha echado en falta algún tipo de atención o servicio?

If you have participated in previous editions, please share with us your opinion comparing your experiences and suggesting aspects that could be improved / Si vous avez participé aux éditions précédentes, nous vous remercions de partager avec nous l'opinion de vos diverses expériences et de nous proposer des axes d'amélioration/ Si ha participado en ediciones anteriores, por favor compare su experiencia y sugiera los aspectos que cree pueden mejorarse:

**OVERALL SCORING / ÉVALUATION D'ENSEMBLE /
 EVALUACIÓN GLOBAL**



Please let us have your suggestions if any: / Veuillez nous faire part de vos suggestions : / Si tiene alguna sugerencia, le rogamos que la haga constar:

Thank you for your cooperation / Merci de votre coopération / Gracias por su cooperación

Deposit this questionnaire in the corresponding box or send it to: Veuillez déposer ce questionnaire à la boîte correspondante ou l'envoyer à : Deposite esta encuesta en el buzón correspondiente o envíela a:	investour@unwto.org or Fax: + 34 91 571 37 33
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6.7. Media Coverage Report

Organization: UNWTO

Title: Investour 2015: África necesita una marca más fuerte

Date: 03.02.2015

Link: <http://media.unwto.org/es/press-release/2015-02-04/investour-2015-africa-necesita-una-marca-mas-fuerte>

Organization: Casa África

Title: El futuro de África ya está aquí

Date: 29.01.2015

Link: <http://www.casafrika.es/detalles-notas-prensa.jsp?PROID=826581>

Media: Europa Press

Title: La VI edición de Investour 2015 buscará impulsar el desarrollo de iniciativas turísticas en África

Date: 03.12.2014

Link: <http://www.europapress.es/turismo/mundo/noticia-vi-edicion-investour-2015-buscara-impulsar-desarrollo-iniciativas-turisticas-africa-20141203122413.html>

Media: Dirigentesdigital.com

Title: INVESTOUR 2015, impulse del desarrollo de iniciativas turísticas en África

Date: 05.01.2015

Link: <http://www.dirigentesdigital.com/articulo/mercados/nuevos-mercados/217933/investour/2015/plataforma/impulsar/desarrollo/iniciativas/turisticas/africa.html>

Organization: Pacific Asia Travel Association (PATA)

Title: Investour 2015: Africa need a stronger brand

Date: 04.02.2015

Link: <http://www.pata.org/tag/investour-2015/>

Media: Veille Info Tourisme

Title: Investour 2015: l'Afrique a besoin d'une marque plus forte

Date: 03.02.2015

Link: <http://www.veilleinfotourisme.fr/investour-2015-l-afrique-a-besoin-d-une-marque-plus-forte--138187.kjsp>

Media: Periódico Jaén

Title: Fitur.- África promueve la cooperación turística en Investour 2015, una región que supone el 15% del turismo mundial

Date: 29.01.2015

Link:

http://www.periodicojaen.com/_n3087511_Fitur._Africa_promueve_la_cooperacion_turistica_en_Investour_2015_una_region_que_supone_el_1525_del_turismo_mundial.html

Media: Pulso turístico

Title: INVESTOUR: abrir oportunidades de negocio en África

Date: 28.01.2015

Link: http://www.pulsoturistico.com/mas_informacion.asp?id=7447&titulo=INVESTOUR-abrir-opportunidades-de-negocio-en-Africa

Media: World Travel Online

Title: INVESTOUR 2015, a platform for boosting the development of tourism in Africa

Date: 15.12.2014

Link: <http://news.travel168.net/20141215/35113.html>

Media: eldiario.es

Title: 1.500 empresas españolas de encuentran asentadas en África

Date: 29.01.2015

Link: http://www.eldiario.es/canariasahora/especial/fitur/empresas-espanolas-encuentran-asentadas-Africa_0_351015757.html

Media:

Title: El ministro Soria destaca en INVESTOUR la relación entre África y España y pone a disposición de los países de este continente el 'know-how' turístico español

Date: 30.01.2015

Link: <http://www.ejecutivos.es/el-ministro-soria-destaca-en-investour-la-relacion-entre-africa-y-espana-y-pone-disposicion-de-los-paises-de-este-continente-el-know-turistico-espanol/>

Media: El DÍA.es

Title: Soria inaugural la VI edición de Investour, que busca impulsar iniciativas turísticas en África

Date: 29.01.2015

Link: <http://eldia.es/economia/2015-01-29/5-Soria-inaugura-VI-edicion-Investour-busca-impulsar-iniciativas-turisticas-frica.htm>

Media: autobild.es

Title: Fitur 2015 abre sus puertas: turismo para todos los gustos

Date: 28.01.2015

Link: <http://www.autobild.es/noticias/fitur-2015-243589>

Media: artmatters.info

Title: Spain to Host 6th Tourism Investment and Business Forum for Africa

Date: 24.01.2015

Link: <http://artmatters.info/travel/2015/01/spain-to-host-6th-tourism-investment-and-business-forum-for-africa/>

Media: Negocio Marruecos

Title: La Feria Internacional de Turismo de España, Fitur, que se celebra estos días en Madrid, ha sido el escenario, un año más, del Foro de Inversiones y Negocios Turísticos en África, Investour.

Date: 16.02.2015

Link: <http://www.negociomarruecos.com/leer-noticia.aspx?idNoticia=6159>

Organization: Casa África

Title: El futuro de África ya está aquí

Date: 29.01.2015

Link: <http://www.casaffrica.es/detalles-notas-prensa.jsp?PROID=826581>

Media: Casa África

Title: Investour, el punto de encuentro africano en Fitur

Date: 19.01.2015

Link: <http://www.casafrika.es/detalles-notas-prensa.jsp?DS13.PROID=826527>

Media: Negocios y convenciones.com

Title: Foro de negocios INVESTOUR en FITUR 2015

Date: 16.12.2014

Link: http://www.negociosyconvenciones.com/NC_Espanol/inc_140058.html

Organization: Ministerio de Asuntos Exteriores y Cooperación

Title: La casa de diplomacia pública en Fitur

Date: 26.01.2015

Link:

http://www.exteriores.gob.es/Portal/es/SalaDePrensa/NotasDePrensa/Paginas/2015_NOTAS_P/20150126_NOTA017.aspx

Organization: Côte d'Ivoire Tourisme

Title: Tourisme en Afrique : pour le faire prospérer, il faut des politiques ad hoc, selon le vice-président de la BAD par intérim

Date: 30.01.2015

Link: <http://www.cotedivoiretourisme.ci/?p=7920>