



Republic of Botswana

TOURISM POLICY

As approved by the National Assembly on the 14 April 2021

**MINISTRY OF ENVIRONMENT, NATURAL
RESOURCES CONSERVATION AND TOURISM**

FOREWORD

Tourism is a sector of immense global socio-economic impact with even greater potential. It is a catalyst for investment in other sectors and it stimulates economic diversification across sectors. It is also a generator of employment and it can contribute positively to foreign exchange earnings and serve as a leading demonstration sector fostering enterprise development. The Government of Botswana has thus identified the tourism sector as a sector with potential to contribute to economic diversification.

According to the Tourism Satellite Account (TSA) 2016, the sector's contribution to GDP is estimated at 4.9% with 1.9 million tourist arrivals (2016) and an estimated 18666 jobs (2018). Sustainable tourism is a powerful tool for job creation, as well as economic growth and plays a critical role in rural revitalization and community development. Tourism contributes to improved livelihoods, inclusion, cultural heritage and natural resources conservation.

The first Tourism Policy was developed in 1990, and it has outlived its usefulness considering the competitive tourism environment Botswana operates within. Therefore, it became necessary that it should be reviewed to align it with the current developments and trends in the tourism industry as well as with the aspirations of the

National Vision (Vision 2036), National Development Plan and Sustainable Development Goals (SDGs).

The review of the policy called for a consultative process and concerted efforts by all stakeholders consisting of among others, Government Ministries, Academic institutions and the Private Sector. The reviewed policy will allow the sector to comprehensively address the broader tourism objectives to create an enabling environment to enhance competitiveness of Botswana as a tourism destination as well as to encourage the growth of private sector initiatives in the sector. The Government and the private sector must work more effectively in partnership, in building a strong institutional framework to implement the revised policy and to foster innovation and business development.



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TABLE OF CONTENTS

FOREWORD.....	ii
ABBREVIATIONS AND ACRONYMS.....	v
DEFINITIONS.....	vi
I INTRODUCTION.....	1
II SITUATIONAL ANALYSIS	3
III BOTSWANA'S TOURISM VISION.....	7
IV TOURISM POLICY INTERVENTIONS.....	9
V TOURISM FUNDING AND FINANCING.....	28
VI ROLE OF STAKEHOLDERS.....	29
VII IMPLEMENTATION AND MONITORING.....	30

ABBREVIATIONS AND ACRONYMS

AIDS	Acquired Immunodeficiency Syndrome
BTB	Botswana Tourism Board
BTO	Botswana Tourism Organization
CBNRM	Community Based Natural Resource Management
DOT	Department of Tourism
DWNP	Department of Wildlife and National Parks
FDI	Foreign Direct Investment
GDP	Gross Domestic Product
HIV	<i>Human Immuno Virus</i>
MICE	Meetings Incentives Conferences and Exhibitions
NES	National Ecotourism Strategy
NGOs	Non-Governmental Organisations
SADC	Southern African Development Community
SMME	Small Medium and Micro Enterprises
SWOT	Strengths, Weaknesses, Opportunities and Threats
TFCAs	Trans-Frontier Conservation Areas
TSA	Tourism Satellite Account
UNWTO	World Tourism Organisation
WMAs	Wildlife Management Areas
WTTC	World Travel and Tourism Council

DEFINITIONS

The following definitions are adopted for the purposes of this policy:

Botho - the concept refers to one of the tenets of African culture - the concept of a person who has a well-rounded character, who is well-mannered, courteous and disciplined, and realizes his or her full potential, both as an individual and as a part of the community to which he or she belongs.

Cultural tourism - is tourism whereby cultural aspects which are of interest to the visitors are marketed, including but not limited to the customs and traditions of people, their heritage, cuisine, performing arts, history and way of life.

Community - is a group of people bound together by social and economic relations based on shared interests. A community may consist of a diverse group of people, living in one or more settlements, with varied socio-economic interests and capabilities sharing an interest in the development and management of tourism in their common area.

Community Based Natural Resources Management (CBNRM) is a development approach that incorporates natural resources conservation, the ultimate aim of which is to manage and protect the natural resources base. For the purpose of this Policy CBNRM includes the management of cultural resources as defined in the National Ecotourism Strategy.

Domestic tourist - is a resident travelling within their country of residence and staying in places outside their usual environment for one night, but not more than one consecutive year, for leisure, business, visiting friends and relatives and other purposes.

Domestic tourism - Domestic Tourism comprises the activities of residents of Botswana travelling within Botswana to and staying in places outside their usual environment for one night, but not more than one consecutive year for leisure, business, visiting friends & relatives and other purposes.

Ecotourism - is responsible travel to natural areas which conserves the environment and sustains the well-being of local people.

Environment - includes all natural, urban, human living and cultural environments.

Protected area - refers to a geographically defined area which is designated or regulated area to achieve specific conservation objectives in the areas of wildlife, forests, cultural heritage, monuments, etc.

Small Medium and Micro Enterprises (SMMEs) - are small, medium and micro enterprises.

Sustainable Tourism - concerns tourism development, management and any other tourism development activities which optimise the environmental, economic and other societal benefits available without jeopardising the potential for similar benefits in the future.

Tourism - comprises all activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.

Tourist - is a person who travels to and stays in places outside their usual environment for more than twenty-four (24) hours and not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from the place visited. A tourist may be a domestic tourist or international tourist.

1. INTRODUCTION

- 1.1 During the past few decades, Botswana has emerged as one of the most impressive economic performers in Africa, boasting of a track record of spectacular economic growth, stability and transparency. However, the economy is not well diversified and depends heavily on diamonds. This does not bode well for sustainable, long term economic and social prosperity. In addition to being a finite resource, diamond mining's high capital intensity makes it a low employment generator. As evidence from the Global Economic Crisis shows, diamond mining is highly vulnerable to demand and price fluctuations. It is against this backdrop that the tourism sector has been viewed as one of the potential growth engines for economic diversification.
- 1.2 The existing National Tourism Policy was formulated in 1990 (Botswana Government, 1990), with the prime objective of shifting the mix of tourists away from those who were casual campers towards those who occupied relatively permanent accommodation. The policy also sought to increase the financial returns deriving from tourism to the people of Botswana. Its major interventions were to take route through taking control of the industry via licensing and regulation. Tourism concessions governing state and private lands as well as leasing conditions were also used to regulate the sector. Similarly, taxation laws that covered sales and corporate taxes, licensing fees as well as localisation strategies were applied for the same purpose.
- 1.3 Subsequent to the formulation of the 1990 Tourism Policy there were a number of policy instruments that were enacted and these included the Tourism Act (1992) and Tourism Regulations (1996). The Tourism Master Plan (2000), the Tourism Development Framework (2001) and the National Ecotourism Strategy (2002) were also formulated.
- 1.4 As part of the development of the Tourism Master Plan a SWOT analysis was undertaken that identified factors that were critical for the future development of tourism. It also identified various development objectives of the sector, among them employment generation particularly in rural areas, as well as the stimulation of other services and strengthening of linkages with the broader economy. These objectives were to be addressed through the strategies of; Product Diversification; Community/citizen participation; Private/Public Sector Partnership and Ecological/economic sustainability. On evaluating different tourism development models it concluded that a modified high volume/mixed priced model would be the most appropriate and the preferred option for Botswana.

- 1.5 Regarding Private/Public Sector partnership, the plan argued that the most significant tool for strengthening collaboration and partnership between these two sectors would be the establishment of a National Tourist Board. Three years later the Botswana Tourism Board Act (2003) was enacted thereby creating the Botswana Tourism Board (BTB) later renamed the Botswana Tourism Organisation (BTO) by the Botswana Tourism Organisation Act (2009).
- 1.6 The Botswana Tourism Development Framework was formulated to assist the Department of Tourism (DOT) in implementing the Botswana Tourism Master Plan. It exclusively focused on continued product development and diversification of tourism in the most underdeveloped southern and western areas of Botswana namely, Ghantsi, Kgalagadi and the Central Districts, and Gaborone.
- 1.7 The Botswana National Ecotourism Strategy was formulated to enhance travel packages to Botswana's historical, cultural and natural environments. This would also increase knowledge about the environment thus promoting financial development opportunities for the local host communities.

Rationale for the Review of the Tourism Policy of 1990

- 1.8 While many of the provisions of the Tourism Policy (1990) are still valid, significant changes in the tourism environment during the past two decades require policy revisions. Specific reasons for change include:
 - i. The policy follows a strong regulatory and public interventionist approach with various key aspects of competitiveness, (e.g. differentiation, access and infrastructure, marketing, investment and business promotion and others), not receiving adequate attention.
 - ii. Various aspects of the policy have become outdated through having either been implemented or having been overtaken by events and changes in the tourism environment, such as: The enactment of the Tourism Act of 2009 and Tourism Regulations of 2010, the establishment of the Tourism Board and other related issues.
 - iii. Some directives contained in the policy are broad and do not provide clear direction for addressing key issues.
 - iv. Having been approved in 1990, the policy was never aligned to either Vision 2016 or current Vision 2036.

- 1.9 The Policy review process commenced in 2008 with the assistance of the World Tourism Organisation (UNWTO). It involved extensive consultation with stakeholders through personal interviews, surveys with key stakeholders at various locations and stakeholder workshops.
- 1.10 Subsequent to stakeholder workshops, an issues paper was drawn, with recommendations on how to address key issues and a comprehensive review report was produced.

2. SITUATIONAL ANALYSIS

Resource Endowment

- 2.1 Botswana is endowed with diverse and abundant wildlife and wilderness resources. It also has other resources, cultural practices and monuments that the world needs to see. These range from the Kalahari Desert in the South to the Okavango Delta which is the World's famous 1000th Heritage Site and the Chobe Plains in the North and the Makgadikgadi Pans in the North Central. The Government has set aside more than 17 per cent of all available land for National Parks and wildlife sanctuaries and a further 23 per cent as Wildlife Management Areas (WMAs). These resources are sought after by tourists globally and strongly compliment the global tourism trend towards greater environmental awareness and the need to experience nature in its original state. In addition to the pristine wilderness and wildlife, Botswana tourism has indigenous cultural practices and knowledge that offer more diverse leisure enjoyment. Different cultural interpretations of the natural wilderness and ancient traditions such as rock art and others offer unparalleled tourism experience.

The Importance of Tourism in the Economy

- 2.2 Tourism plays a significant role in the Botswana economy with comparatively high visitor population ratios and a significant contribution to GDP. Through the elaboration of a Tourism Satellite Account (TSA) for Botswana by the UNWTO, it was estimated that tourism directly contributed 4.9 percent to GDP in 2016 and the combined direct and indirect contribution to GDP is around 7.6 percent. Direct tourism employment was estimated at 18, 670 (Formal Sector Employment Survey 2016).

International Brands

- 2.3 Tourist accommodation in main cities and towns is mostly owned by Botswana companies and individuals with few international brands having presence. More investment is needed in this area to improve the country's competitiveness even further. Thus investment promotion drive should

facilitate investment by international tourism brands in partnership with local entrepreneurs.

Legislative arrangement

- 2.4 There are various pieces of legislation and policies in Botswana that affect the tourism sector and can hamper competitiveness of the tourism sector if not harmonised. These include the Botswana Tourism Organization Act (2009), Environmental Assessment Act (2011), Wildlife Policy (2013), Human Resource Development Act (2013) etc.

In view of the dynamic and complex nature of the tourism sector, it is therefore necessary to come up with measures to strengthen the legal and regulatory environment for tourism. There is also need for a multi-sectoral consultative mechanism for the engagement of other key players in order to harmonise the legislation and ensure effective and efficient delivery of services in the tourism sector.

Constraints to the Tourism Sector

- 2.5 Despite its rareness, Botswana's pristine and exclusive tourism environment does not seem to have generated commensurate benefits for the economy and its population. Existence of limited linkages between this sector and other sectors has led to high economic leakages from the sector. The net effect of these constraints has been that Botswana has ended up being an "add-on destination" to other regional tourist attraction centres instead of being a "destination of choice". Amongst other causes, the following have been identified:

- 2.5.1 **Lack of a growth-directed positioning:** Botswana is currently positioned as "high value-low impact" destination. While this exclusive approach has received much recognition, the challenge with this positioning is that the high-end, exclusive safari lodge industry offers limited expansion opportunities as most of the valuable resources for this market level have been developed. Even if more areas are opened up and more concessions are awarded for such exclusive developments, growth will remain limited given the importance of retaining visitor exclusivity. There is a need to expand the positioning to broaden the range of middle-to-high tourism market segments and products, thus improving visitor yields while retaining the essence of the wilderness brand.
- 2.5.2 **Inadequate product range and diversity:** The range of tourism experiences is limited and inadequately diversified. Other than motorised wildlife viewing, activities within and around key tourism attraction points are of limited scope and variety resulting in a short average length of stay

and low return visitation. Protected areas are not clearly differentiated and visitor management and development approaches are not adequately diversified among the various key parks and sites. Rich cultural values and experiences have not been adequately exploited for tourism purposes and there is a need to capitalise on the interrelationships between people and nature.

- 2.5.3 **Limited brand equity and inadequate marketing:** Destination marketing has been inadequate due to the historical lack of a comprehensive and coordinated marketing strategy. The marketing focus has been largely focused on the upmarket safari brand in northern Botswana thereby limiting the range and scope of target market segments and encouraging regional disparities.
- 2.5.4 **Key access and infrastructure shortcomings:** It is globally accepted that internet-based marketing is a key success factor for marketing tourism destinations. The world-wide-web has evolved to become the most important marketing and reservations channel in tourism, internet access, bandwidth and e-marketing capabilities in Botswana are not on par with global tourism destinations. Broadband access is limited and download speeds are relatively slow in most areas.
- 2.5.5 **Limited Air access:** Air access is limited and expensive with very few direct flights from international markets caused by an extremely restrictive aviation regime. Equally, road access to many tourist areas is limited to off-road vehicles and certain key paved roads require urgent improvement. Road signage and tourist information require improvements to cater for a growing independent travel market.
- 2.5.6 **Limited citizen participation in tourism:** Prime tourism opportunities such as prime lodges and higher – end hotels remain in the hands of a few dominant operators and therefore citizen participation in tourism is for lower investments. Furthermore, joint ventures between citizens and foreigners have been extremely limited. Very few tourism related companies have floated their shares for a wider citizen participation. Successful true partnerships and joint ventures between communities and tourism business operators are few and far between.
- 2.5.7 **Weaknesses in tourism planning, governance and environmental management:** Tourism planning is inadequate, especially in and around protected areas where tourism pressures could result in negative environmental impacts such as erosion and damage by off-road vehicles, unacceptable visitor densities in key tourism areas and poor waste

management. Tensions also prevail between wildlife conservation and livestock expansion, especially in wildlife management areas.

- 2.5.8 **Limitations in human resource capacity, skills and services:** Awareness of the benefits and responsibilities associated with tourism among the local population is limited and a true service culture is generally lacking. The local skills pool is limited and high level technical and management skills are lacking. There is lack of knowledge in usage of new technologies and e-business especially for tourism related Small Medium Enterprises, therefore, there is need to introduce and encourage the use of new technology in the industry. It is also necessary to promote practical training, mentoring initiatives and systems in support of local entrepreneurs.
- 2.5.9 **Inadequate resources:** Tourism by its very nature requires huge capital expenditure that is not always readily available within public and private sector. It is therefore crucial that resourcing of the sector is prioritised, especially for infrastructural development, for it to reach its full potential.
- 2.5.10 **Inter-Institutional weaknesses:** Government Ministries, Parastatals, Private Sector Institutions and Community Based Organisations with tourism related functions do not work in synergy towards a collective tourism vision. It is therefore important that all these role players commit to the realisation of the vision. There is also lack of pooling of resources and support services amongst the various role players.
- 2.5.11 **Limited tourism capacity and focus at local level:** It is apparent that Local Government institutions play an important role in the socio-economic development of the country including tourism. Tourism occurs at district level and local authorities should be directly involved and empowered to plan and implement tourism programmes in alignment with national priorities. That notwithstanding, Local Authorities are not sufficiently resourced to champion tourism related activities.
- 2.5.12 **Inadequate regional collaboration;** Botswana's central location in the region places it in a unique position to link its tourism experiences to those of its neighbours, thereby creating a world-class tourism circuit. Unfortunately collaboration between the various Southern African Development Community (SADC) countries is limited and multi-destination packaging and promotion is largely left to the private sector. To effectively capitalise on the potential value of regional cooperation, the following should be pursued; differentiated brand marketing and positioning, liberalisation of air routes, a seamless and hassle free

emigration services and support for a regional tourism organisation. Botswana and its neighbouring countries have the potential to establish the largest circuit of interlinked wilderness areas in the world.

- 2.5.13 **Tourism Economic Leakages;** Botswana is blessed with abundant tourism resources, yet the revenue generated by the sector is not commensurate with investment. It is evident that revenue generated by tourism in Botswana is lost to other countries' economies because head offices for major tourism investors are situated in other countries. Government will take bold decisions to address tourism leakages and review legislation governing flow of revenues.
- 2.5.14 **Values Systems;** Botswana are generally perceived not to be warm and welcoming to tourists as depicted by competitiveness reports. Botswana's customer service skills are still wanting and many understand very little about tourism in Botswana including those that work within the hospitality industry. It is therefore imperative to review the country's value system so that it remains competitive.

3. BOTSWANA'S TOURISM VISION

Policy Goal and Vision

- 3.1 The goal of the tourism policy is to position Botswana as a tourist destination of choice by year 2030 and beyond by elevating the recognition of tourism as a priority growth area and aggressively developing and promoting the sector. Botswana will be globally renowned as the most authentic and exciting wilderness in the world offering unparalleled nature, heritage and local lifestyle experiences in a safe and easily accessible environment. The tourism industry will be diversified to provide economic growth and employment opportunities for local communities, as well as empower them to participate and benefit meaningfully from the industry.
- 3.2 The policy envisions tourism developing in harmony with the environment and it will be highly valued as a cornerstone of the national economic strategy, with large numbers of Botswana participating and benefiting from a growing tourism industry. This policy will promote a balanced tourism management, in order to capitalise on its potential to achieve a sustainable high growth. The policy is also intended to set the scene for excellence in growth and vibrant, globally recognised tourism industry with growth targets of 11.4% contribution to GDP by 2030 (in line with global forecasts) from the current 7.6%; increase tourism contribution to total employment from the 18000 to 40 000 by 2030.

Key Objectives

3.3 The following key objectives will be pursued in striving for the vision:

- i. Elevate the recognition of tourism as a priority growth sector in Botswana;
- ii. Adequately fund and aggressively develop and promote the sector;
- iii. Increase and grow the contribution of tourism to the GDP;
- iv. Develop world class infrastructure for facilitation of tourism;
- v. Substantially increase the share of local ownership, and community participation;
- vi. Advance investment in tourism and create a conducive and stable business environment;
- vii. Promote domestic tourism;
- viii. Promote other forms of tourism such as, Culture, Heritage, Sports, Religion Tourism, Meetings Incentives Conferences and Exhibitions (MICE), Game Farming, Research, Astro-tourism, Agro-tourism etc. to diversify the tourism product;
- ix. Employ best practices of environmental management and conservation in the tourism sector in order to be a globally acknowledged leader in environmental and nature conservation;
- x. Ensure easy and unhindered access for prospective tourists to and within Botswana; and
- xi. Ensure that entrepreneurs fully subscribe to the set standards.

Critical Success Factors

3.4 For this policy to be successful the following factors will have to be realised:

- i. Mainstreaming of tourism in Government planning process;
- ii. Improvement of access and infrastructure;
- iii. Meaningful citizen and community participation in the industry;
- iv. Availability of Government and Private sector funding;
- v. Availability and Access to land for tourism purposes;
- vi. Enhanced Public/Private Sector Partnerships
- vii. Increased use of Information Technology and
- viii. Product Diversification.

4. TOURISM POLICY INTERVENTIONS

- 4.1 In the last three decades, considerable changes have taken place in the world economy brought about by the growing intensity of international competition spurred by the advent of globalization. As tourism continues to grow globally it is therefore necessary to maximize Botswana's share of the market.
- 4.2 This section therefore, defines policy objectives and related strategies according to the following key building blocks; Product Development and Diversification, Marketing and Promotion, Investment and Business Development, Research and Information Management, Planning and Coordination, Citizen Ownership and Community Participation, Proper management of the country's Environment Resource Base, Management and Development of Protected Areas, Training and Education, Safety and Security, and Access and Infrastructure.

Product Development and Diversification

- 4.3 Tourism is highly demand driven with global travellers being confronted by an ever-growing range of travel choices and becoming increasingly selective and demanding in their travel choices.
- 4.4 The Botswana Government realises that the tourism sector is narrowly focused on wildlife and wilderness tourism. The development, diversification and expansion of tourism attractions and products are pre-requisites for

Botswana to expand its market reach and share. To achieve this, policy intervention for Product Development and Diversification will entail:

- i. Broadening the tourism base by adding new product components and opening up new areas;
- ii. Promoting responsible tourism;
- iii. Facilitating the use of new technologies and innovation to transform the tourism product base;
- iv. Planning and facilitating the development of a vibrant tourism in urban centres with community entertainment, social venues, recreation areas; shopping and adjacent nature experiences;
- v. Pursuing tourism linkages such as mining (e.g. diamond tours, diamond shopping, etc.), agriculture, game ranching/farming, arts and crafts, etc;
- vi. Developing an events strategy to attract and develop high-calibre outdoor and nature-oriented sport and cultural events;
- vii. Identifying underdeveloped cultural/natural attractions and sites with tourism potential and initiate a programme for upgrading and improving visitor access, interpretation and amenities at such locations; and
- viii. Expanding the national grading and classification system to include the eco-tourism standards.

Marketing and Promotion

4.5 International tourism competition is fierce and competitor destinations are becoming increasingly equipped and skilled at expanding their market shares. Marketing of the tourism product is crucial for the enhancement of Botswana's competitive edge and in striving for a greater share of the region's tourism earnings.

- 4.6 Botswana will adopt a marketing approach to maintain and expand its market as an exclusive and unique tourist destination by re-positioning it through unique selling strategies and niche markets. This will be achieved through:
- i. Identifying and positioning tourism growth points and establishing the requisite capacity and infrastructure to grow the industry;
 - ii. Formulating a growth-directed marketing strategy aimed at broadening the market range, with special emphasis on expanding markets segments;
 - iii. Developing a vibrant and exciting tourism brand identity;
 - iv. Increasing domestic tourism marketing, with special emphasis in facilitating Botswana to explore their own country;
 - v. Partnering with Local Authorities in tourism marketing and promotion;
 - vi. Improving the e-marketing infrastructure and capacity; and
 - vii. Promoting and positioning urban centres as superior Meetings Incentives Conferences and Exhibitions (MICE) tourist destinations and establishing the necessary capacity and infrastructure to grow this market.

Tourism Cluster Development

- 4.7 Government has adopted the Cluster Development Initiative in an effort to diversify the economy and improve the country's competitiveness. The tourism sector is one of the first three sectors whose clusters are being developed. A strategy for the Ngamiland Region which is used as a pilot has already been developed.
- 4.8 The role of clusters is to primarily improve the competitiveness of businesses in the value chain as well as the overall competitiveness of the region. Policy interventions will include:
- i) Facilitating formation of clusters in tourism attraction areas;
 - ii) Facilitating collaboration and linkages between cluster agents (private sector, government, academic institutions, communities, NGOs, etc);
 - iii) Promoting diversification and broadening of tourism base by adding new products thereby increasing tourist product offer at regional level;

- iv) Enhancing a unique image and brand identity of the different attraction areas through the identification and promotion of their unique selling factors;
- v) Facilitating linkages with other sector clusters e.g. beef, diamond, Finance & Knowledge Intensive Business Services, etc; and
- vi) Facilitate development of infrastructure to promote cluster growth.

Domestic Tourism

4.9 Over the years, the tourism sector has operated without a Domestic tourism strategy, and this has hampered the growth of domestic travel and consequently the involvement of Botswana in local travel. This lack thereof, has affected the development of products and services suitable for domestic uptake across the country and its consequent contribution to the economy.

4.10 Domestic tourism is an excellent tool for regional development due to its income distribution and its various multiplier effects all throughout the value chain. From the macroeconomic point of view, it makes it possible to develop infrastructure, transport, accommodation, development and protection of public spaces. When fully developed, domestic tourism is an excellent crisis shock-absorber, especially in the case of economic, social, health and natural crisis.

4.11 The Tourism Policy interventions for Domestic Tourism will include:

- i) Encouraging development of products and services suitable for domestic consumption, e.g. adapting accommodation facilities to local demand such as family structures, long stays, self-catering, and holiday homes, etc.
- ii) Addressing the matters of land costs and development, very long term public and semi-public financing, tax policy to facilitate domestic investment.
- iii) Encouraging development of local structures for promotion of domestic travel at regional and local level.
- iv) Facilitating development of access infrastructure centres across the country to create domestic tourist trails/routes.

Local Authorities and Institutions Participation in Tourism

4.12 While central government through the Ministry responsible for Tourism assumes the responsibility of policy formulation, Local Authorities are best placed to provide leadership, advocacy and the necessary planning to ensure that communities and local businesses get the most out of tourism and minimise negative impacts, therefore there is need to capacitate Local Authorities and institutions to facilitate tourism. This would also mobilise Community Based Organisations and explore opportunities for them to provide realistic assistance to maximise potential tourism opportunities. The Local Authorities will be involved through the following:

- i) Carrying out advocacy, promotion and implementation of tourism plans and projects in the interest of achieving sustainable tourism practices at all levels of society;
- ii) Prioritising tourism development in the development plans of Local Authorities
- iii) Advocating for tourist facilities and services to support local communities.

Investment and Business Development

4.13 Botswana is in need of increased tourism investment and business expansion. Foreign investment is highly valued and should be facilitated in synergy with efforts to promote local tourism ownership and entrepreneurship. The following interventions are supportive of investments and business development:

- i. Facilitating and giving special preference to Foreign Direct Investment (FDI) in tourism that embraces public floating of shares through stock markets, joint ventures with citizens, entrepreneurial and management skills development and international market access;
- ii. Developing a framework of incentives to facilitate investments that meet strategic criteria such as investment in rural areas and diversified products e.g cultural and heritage tourism, adventure and sport tourism, community based tourism etc;
- iii. Strengthening of the tourism land bank;
- iv. Supporting an investment promotion drive to facilitate investment by international tourism brands;

- v. Facilitating citizen owned consortia;
- vi. Facilitating the private sector to invest in and develop other ecosystems especially in rural areas;
- vii. Establishing practical training and mentorship opportunities for emerging tourism businesses to learn from, be guided by and create business linkages with established tourism businesses;
- viii. Creation of linkages with other sectors and other tourism ventures;
- ix. Facilitating growth in tourism entrepreneurship and opportunities for SMMEs; and
- x. Promoting and facilitating arts and crafts development.

Research and Information Management

4.14 High quality and timeliness of information and market intelligence are key success factors for successful tourism development and marketing. It also makes it possible for actors in the sector to see strategic trends as well as benchmark performance with competitors. Data availability and improved market research are therefore crucial for the formation of appropriate marketing strategies and decisions. It is critical to develop research expertise, infrastructure and create a conducive environment to meet tourism research. In light of this, the following actions shall apply:

- i. Improving the quality, detail and timeliness of tourism performance information, in particular tourist arrival statistics, employment statistics, business growth and receipts;
- ii. Improving market intelligence to be able to monitor international and domestic trends as well as identify the most lucrative market segments, their profiles and for achieving the best returns on marketing investment;
- iii. Make information and research outputs available to the stakeholders on regular and transparent manner;
- iv. Establishing Tourism Information Centres at strategic places;
- v. Collaborating with Statistics Botswana in all aspects of tourism statistics; and

- vi. Collaborating with relevant research institutions (public and private) on tourism research.

Planning and Coordination

- 4.15 Government realises that activities of the tourism sector have a bearing on other sectors and vice versa. Therefore laws, regulations and mandates of different ministries have an impact on this sector. It is of paramount importance for an integrated development planning approach to be applied when planning for this sector. The need to synchronise and coordinate local, district and national tourism planning initiatives is critical.
- 4.16 A key success factor in implementing a growth directed tourism strategy is coordination among Government ministries and other sectors. Tourism success is highly dependent upon appropriate action and implementation by key related Ministries and Departments responsible for transport, roads, aviation, conservation, culture, telecommunications and many others. In order to achieve the obligations of an improved planning and coordination in the tourism sector, the following strategies shall apply:
 - i. Facilitating the participation of Local Government institutions in key tourism areas in the coordinating structures.
 - ii. Establishing an information and statistics coordinating mechanism consisting of key parties involved in delivering tourism statistics to ensure timely and valid tourism performance information;
 - iii. Promoting and supporting inter-sectoral coordination between the tourism sector and other sectors;
 - iv. Establishing multi-sectoral coordinating mechanisms to ensure greater coordination and effective implementation of policies and plans among the various sectors that impact on tourism;
 - v. Developing dedicated tourism development plans in all districts as guidelines for future tourism developments feeding into the National Development plan;
 - vi. Strengthening tourism planning expertise in the Government sector; and
 - vii. Building capacity of Local Authorities to enable them to play a bigger role in the development and growth of the tourism sector.

Public Sector Organisational Linkages

- 4.17 Given the limited tourism financial and human resources and substantial tourism development challenges in Botswana, it is important that public sector tourism institutions should operate within a clear organisational framework and that the roles should be clear in order to avoid duplication and wastage of resources.
- 4.18 Tourism cuts across and has the potential and ability to drive demand and production of goods and services, stimulate business activities in all other sectors of the economy and thus contribute to sustainable economic development and diversification. The Tourism Policy recognises that any sustainable development of tourism in Botswana requires expansion of the product base, either by increasing existing capacities and/or adding new product components. To drive this Policy and to achieve the laid down objectives would therefore require participation by all public sector organisations to provide the necessary environment for the growth of tourism. The following will be pursued to derive maximum benefit from the linkages:
- i) Implement and facilitate policy, planning and regulatory and financing frameworks and programmes to enable, stimulate, guide and control tourism growth;
 - ii) Coordinate and influence the efforts of public sector departments and other agencies to deliver appropriate public tourism infrastructure, tourism attractions and support programmes, in support of the tourism policy.

Regulation of the Tourism Industry

- 4.19 There is need for the implementation and facilitation of tourism policy planning, regulatory and financing framework and programmes in order to stimulate and control tourism growth. Therefore the following strategies will apply:
- i. Conduct and coordinate tourism spatial and strategic planning;
 - ii. Collaborate with relevant ministries and agencies in establishing policy instruments on tourism-related programmes and projects and manage them as required;
 - iii. Initiate and implement priority tourism-related public sector development projects;

- iv. Establish policies, services and instruments to facilitate the growth of tourism SMMEs;
- v. Initiate and coordinate a tourism training and education strategy and implementation programmes;
- vi. Manage information for performance monitoring purposes; and
- vii. Investigate tourism leakages and formulate strategies and instruments to reduce leakages.

Conservation and Management of wildlife resources

- 4.20 In order for protected areas to be key catalysts to tourism growth, the tourism capacity and capabilities of the conservation authority should be substantially strengthened and improved. The Policy advocates for the establishment of the National Parks Committee with the objective of improving and strengthening capabilities of the conservation authority.
- 4.21 The Committee is envisaged to bring about efficient management of protected areas, which has the potential to support a sustainable tourism growth at national level. The National Parks Committee would therefore offer some of the advantages as follows:
- i. Coordination of the management of protected areas at national level;
 - ii. Oversee the management of resources in accordance with conservation and tourism objectives;
 - iii. Establish a platform at national level that will provide inter-linkages in the parks management, as well as provide a leverage in the promotion of economic viability of the parks potential;
 - iv. Monitor performance of respective parks in line with their set strategic targets and implementation of management plans;
 - v. Speedy action and decision-making, especially dealing with private investors and establishing partnerships
 - vi. Establish a service-oriented culture and a common vision for all the national parks, paying attention to the uniqueness of each area; and in order to enhance an efficient and effective functioning Committee a supporting fund will need to be established.

Monuments & Heritage Sites

4.22 The development of culture and heritage monuments plays a key role in diversifying the tourism product base. The following interventions are thus necessary:

- i. Development of a National Master Plan for the conservation and management of heritage sites.
- ii. Formulation of management plans and regular inspection of monuments.
- iii. Provision of adequate information of all the sites including installation of signage for all the heritage sites.
- iv. Provide funds and build capacity for the listing of Botswana's sites on the World Heritage List in order to grow tourism.
- v. Intensify research on heritage sites to assist in their marketing.

Forest Resources

4.23 Botswana's forests reserves are all located within the Chobe District and represent 4207.42 square kilometres or 3.83% of the total protected land. The forests reserves were strictly set aside for conservation purposes. The forests are managed at broader context by other national and international policies, regulations and treaties. The purpose of opening up of forest reserves for tourism purposes is one way of diversifying the tourism product. The resource requires proper management to enable the controlled opening of the reserves for future sustainable resource utilization and eco-tourism entrepreneurship. There is need to develop a forest reserve management plan to ensure ecological integrity of the reserves and to facilitate/maximise economic benefits. The following will be pursued by the relevant authorities to derive value from the forest resources:

- i) Facilitate access, development and utilization of land to achieve the policy goals;
- ii) Identify and prioritise forest areas in terms of their potential for tourism development and for supporting livelihoods of communities living in those areas;
- iii) Specify any threats to the identified forests and possible mitigation measures to highlight the threats;

- iv) Prescribe conservation measures to protect and /or conserve the identified forests;
- v) Improve current land concession system and reward partnerships for community development and participation.

Land Administration & Management

4.24 The Botswana Land Policy of 2015 takes cognisance of tourism as one of the engines of economic growth and that it relies mainly on natural resources that have to be protected and conserved. The land authorities will continue to support the sector by creating an enabling environment for the industry to flourish. The land authorities will:

- i. Facilitate access, development and utilization of land to achieve the policy goals;
- ii. Continue to identify and set aside suitable sites (including cultural and heritage sites) for community tourism purposes;
- iii. Allow communities to sublease such land in accordance with applicable procedures; and allocate tourism concession areas at market rates through tendering and/or affirmative action whichever may be applicable;
- iv. Zone all land and demarcate before allocation;
- v. Integrate land information systems to provide inter-operability as pre e-government programme;
- vi. Computerise and standardise land allocation procedures and
- vii. Protect sites with natural resources that are not replaceable.

Environmental Management

4.25 Sustainable utilisation of natural resources is fundamental for the attainment of a sustainable growth in all sectors of the economy. Environmental management best practices will be promoted through monitoring of impacts and trends, more especially in unique and sensitive areas through the following:

- i. Develop guidelines, establish management systems and provide funding for the preservation and further development of cultural sites of special significance;

- ii. Where state land is allocated and promoted for tourism investments, conduct environmental scoping prior to call for proposals to ensure coverage of environmental sensitivities and reduce duplication of efforts by bidders;
- iii. Launch a communication initiative at border posts and key tourists attractions to inform tourists of the cultural and environmental code of conduct of travelling in Botswana; and
- iv. Work in partnership with academic institutions and NGOs to monitor environmental and cultural impacts and trends in unique and sensitive areas and to flag up environmental and cultural threats.

Immigration and Visa Requirements

4.26 Easing of immigration and visa processes and cross border visitor movement is key to stimulating growth of tourism in Botswana. While efforts have been made to facilitate movement of tourists and enhance the competitiveness of Botswana as a tourist destination, the following interventions are necessary:

- i. Assessing and improving the quality and efficiency of all border entry port facilities and upgrade conditions where necessary;
- ii. Providing a visa on arrival facility under specified conditions; and
- iii. Harmonise entry requirements in the SADC region and establish one-stop-border entry points.

Community Participation, Citizen Ownership and Empowerment

4.27 The Government has made significant efforts in the empowerment of citizens through privatization and management of campsites in protected areas especially National Parks.

4.28 While there has been increased citizen participation in this sector in the recent years, ownership of major tourism businesses is still skewed. There are few success stories regarding community-based tourism enterprises and community private partnerships. Participation in Small Medium and Micro Enterprises (SMMEs) is increasing but still relatively low. Very few tourism related companies have floated their shares for a wider citizen participation.

4.29 Community Based Natural Resources Management (CBNRM) is being promoted to empower communities in natural resources management and to

attract investment in natural resource based enterprises. Community benefits need to be re-addressed and beneficiation should largely be extended to areas where tourist activities take place in order to improve livelihoods of people in those areas and also to develop the areas.

The issues identified shall be addressed through the following interventions:

- i. Increasing the level of community and citizen participation, partnerships and involvement in the tourism sector by solely reserving the existing vacant concessions for allocation to citizen companies or consortia or joint ventures or community trusts;
- ii. Agreeing on clear and transparent criteria for foreign concessionaires and local business owners pertaining to local community participation and benefits including persuading existing concession operators to issue part of shareholding to citizens;
- iii. Subdividing existing larger concessions with a view to establishing new ones for the allocation of citizens;
- iv. Identifying tourism land parcels and reserving them for allocation to citizen companies, community or joint ventures companies or community of no less than five (5) citizen consortia with no less than ten (10) members each;
- v. Allowing that land allocated to citizens through tourism citizen economic empowerment model be used as collateral by allottees to secure shareholding and or partnership;
- vi. Giving preferential allocation of 70% and 30% to new entrants to the tourism sector and existing participants respectively;
- vii. Identifying activities in the tourism value chain that are suitable for local entrepreneurship;
- viii. Promoting community based initiatives in fostering tourism growth and development;
- ix. Developing and promoting programmes for identifying and capacitating individual community entrepreneurs to engage in business ventures and empowerment with business management skills;

- x. Capacity building for technical advisory teams for the support of communities;
- xi. Capacitate communities to take an active role in tourism;
- xii. To increase the share of citizen ownership and management of the tourism industry;
- xiii. Floating of shares to the general public by public and private tourism enterprises; Joint ventures between citizen and foreign investors; and between large and small local tourism entrepreneurs shall be encouraged and incentivised;
- xiv. Earmark suitable state and tribal land for emerging local entrepreneurs; and
- xv. Reserving certain activities for citizen investment.

Management of Environmental Resource Base

- 4.30 There has been over concentration in some tourist attraction centres that have produced some negative environmental impacts. Furthermore, planning, cleanliness and aesthetics of some urban wilderness frontier centres have been compromised. The following strategies will apply;
- i. Promoting and implementing environmental management best practices including ecotourism;
 - ii. Promoting, encouraging and rewarding sustainable tourism practices such as sustainable waste management, use of renewable energy, water saving systems etc;
 - iii. Maintaining the aesthetic image of wilderness centres and tourist centres by working in close collaboration with local communities and other stakeholders;
 - iv. Monitoring of environmental impacts and trends in unique and sensitive areas through partnerships with academic institutions and civil society;

- v. Promoting and developing land resources for tourism in a coordinated manner;
- vi. Developing guidelines and management systems for the preservation and further development of cultural heritage sites; and
- vii. Identification of suitable sites for tourism.

Management and Development of Protected and Wildlife Management Areas

4.31 Botswana's National Parks, Conservation and Protected Areas and Wildlife Management Areas are its tourism jewels and shall be managed and developed with great care and in the interest of current and future generations by maximising benefits in a sustainable manner.

4.32 In strengthening conservation initiatives, Botswana has cooperated with its neighbours in the establishment of Trans-Frontier Conservation Areas (TFCAs). The TFCAs aim to ensure that key ecological processes continue to function and are not inhibited by political boundaries. The concept of the TFCAs is an approach that promotes both conservation of natural resources and tourism development by providing pristine protected areas, as well as diversification of the tourism product.

4.33 To develop protected and wildlife management areas according to their unique characteristics and attributes the following will be pursued:

- i. Designing facilities and amenities to compliment the unique position of each area in terms of development densities, range and type of tourism activities;
- ii. Commercialising and privatising of tourism operations in an open and transparent manner;
- iii. Conducting an assessment and evaluation of the benefits and achievements of the trans-frontier conservation areas with the view to maximise Botswana's benefits from such arrangements;
- iv. Assessing the tourism potential of forest reserves to open up suitable sites for tourism purposes; and
- v. Developing individual management plans for each site.

Training, Education and Awareness

4.34 Tourism success depends heavily on personalised service and hospitality. Therefore, an appropriately skilled and educated workforce is a key success factor for tourism. To develop and improve tourism skills and provide appropriate tourism education and training for potential and existing tourism entrants, Government will:

- i. Facilitate the establishment of a tourism school of excellence of international standards, offering a unique combination of ecotourism and hospitality training in support of the Botswana tourism brand;
- ii. Identify suitable training centres to be encouraged and supported to provide appropriate tourism training;
- iii. Broaden collaboration on training with credible training institutions globally.
- iv. Develop an incentive package for those tourism businesses that actively support tourism and hospitality vocational training programmes;
- v. Improving access to tourism training opportunities for learners with flair for tourism;
- vi. Improve and monitor the application of the national tourism levy and communicating the results to the industry on regular basis;
- vii. Inculcate into the tourism culture and practice, superior service and *botho* across the industry. Such strategy will target frontline staff in the public service sector and the private sector;
- viii. Introduce tourism as a learning area throughout the schools programme, from primary level upwards;
- ix. Promote tourism awareness at all levels of society;
- x. Develop a targeted programme of tourism awareness campaigns;
- xi. Involve rural communities in order to sensitise and make them aware of the economic significance of tourism in their respective areas and the need to preserve and safeguard tourism assets in the knowledge that usage of such assets brings benefits to the whole community and

- xii. Encourage the local media and NGOs to become partners in the tourism education and awareness process.

Safety and Security

4.35 Safety and security are major determinants of the choice of a holiday destination by tourists. Botswana's reputation as a safe and secure tourism destination should be protected. To promote Botswana as a safe and secure destination the following interventions will apply:

- i. Encouraging local tourism role players to engage and liaise with local police regarding initiatives to secure tourism areas and to be alert to potential safety threats;
- ii. Developing a crisis management strategy for tourism;
- iii. Facilitate Botswana's health, safety and security strategies such as neighbourhood watch, communicable and non-communicable disease programmes, etc; and
- iv. Strengthen local and international collaboration on security and information sharing.

v) Protection of property against hazards, e.g fire.

Access and Infrastructure

4.36 Given the substantial travel distances from key markets, easy and affordable access to and within Botswana is key to future tourism expansion. There is need to improve access to and within Botswana through efficient and competitive travel infrastructure to elevate it from what is perceived to be an "add-on" destination to a destination of choice.

Air Access

4.37 While certain advantages of operating a national air carrier cannot be disputed, this should not restrict the expansion of airline movements and entry by new airlines. There is need therefore to:

- i. Take urgent steps to liberalise the Botswana airspace to encourage new airline entrants, ensure increased frequencies on main routes, facilitate price competitiveness and expand the route network;

- ii. Facilitate and allow local private airline operators to operate on scheduled routes within Botswana;
- iii. Upgrade airports to facilitate growth of tourism; and

- iv. Facilitate the development, upgrading and maintenance of airstrips in tourism areas.

Road Access

4.38 The provision of adequate and appropriate transport infrastructure is a vital component of the value chain. Botswana is a vast country and distances between tourism centres and attractions are substantial. The potential growth of the industry is largely dependent upon government's ability to provide appropriate access to the various tourism attractions. To address this challenge, the following will be undertaken:

- i. Developing a "tourism priority roads strategy" to identify key tourism roads and initiate a consistent programme of upgrading, maintaining and safeguarding identified priority roads;
- ii. Facilitate control of animal movement along major highways and tourists routes to ensure the safety of tourists and other road users;
- iii. Developing of ablution and resting facilities within reasonable distance along major highways;
- iv. Assessing the quality of the local tourist taxi industry and improving tourist taxi education and standardisation programme;
- v. Improving road signage to facilitate smooth tourist movements; and
- vi. Collaborating with the relevant authorities on issues of excellent customer service at ports of entry which includes service provision by Immigration, Police and Botswana Unified Revenue Service authorities, as well as improving the quality and efficiency of all border entry points facilities and upgrading entry conditions where necessary.

Rail Access

4.39 Rail offers a variety of experiences in tourism such as scenic, guided tours, special interest tours and transportation. There is need to develop the railway infrastructure for tourism purposes. These measures will be undertaken;

- i. Identification and development of tourist rail routes such as scenic routes.
- ii. Developing appropriate infrastructure and administrative structures for the smooth running of rail for tourism purposes.

Communication Technology

4.40 It is recognised that the internet is fast becoming the most important success factor in tourism. While internet availability and speed has improved in recent years, access remains limited and slow in many parts of the country. There is therefore need to improve access in various parts of the country. To achieve this the following will be pursued;

- i. Ensuring that required telecommunication infrastructure is readily available to promote efficiency and effectiveness in the tourism sector.
- ii. Liberalising the internet service provider sector in order to ensure competition and efficiency in the sector; and
- iii. Improving e-business capabilities of using the internet as a management tool for tourism development, marketing and transacting (e.g. payments and reservations).

Climate Change and Tourism

4.41 Climate change has a significant impact on physical resources supporting tourism and can therefore influence seasonal variations in tourist flows and behaviour. Climate change also influences types of tourism activities necessitating the need for national and regional assessment of the effects of climate change and the potential for adaptation. This will be achieved through the following:

- i. Implement concrete measures in order to mitigate climate change throughout the tourism value chain and reduce risk to travellers, operators and infrastructure;
- ii. Promote and undertake investment in energy efficient tourism programmes and use of renewable energy resources;

- iii. Integrate tourism in the formulation of regional, national and local level adaptation and mitigation strategies and implementation plans;
- iv. Conserve biodiversity, natural ecosystems and landscapes in ways which strengthen resilience to climate change and ensure a long term sustainable use of the environmental resource base of tourism;
- v. Implement climate focused product diversification to reposition local destinations;
- vi. Raise awareness among public and private sector institutions, tourists and communities on climate change impacts and adaptation measures and
- vii. Access funding from different sources to mitigate the effects of climate change.

5. TOURISM FUNDING AND FINANCING

5.1 The effective execution of this policy will require substantial financial resources and therefore the following strategies will be pursued:

- i. Government will provide financial resources for tourism development and improve its financial contribution to tourism taking into account international benchmarks and strategic requirements;
- ii. Facilitate increased funding for tourism marketing and promotion and development of infrastructure.
- iii. Facilitate mobilization of resources from the private sector and
- iv. Advocacy for other financing mechanisms including Public/Private/Partnerships (PPP) and donor funding.

6. ROLES OF STAKEHOLDERS

6.1 The successful implementation of the tourism policy will largely depend on the effectiveness and efficiency of several institutions to deliver on the various recommendations and subsequent initiatives. As indicated in the policy principles, tourism in Botswana will be Government led, private sector driven and Community based.

Government Role

6.2 The leadership role of Government will take the form of the creation of an enabling environment for investment through sound policies, facilitation of easy and suitable access to factors of production and entrepreneurial opportunities. Government will establish appropriate legal and fiscal framework to guide, regulate and facilitate sustainable tourism growth. In undertaking this role, a “whole of government” approach will be applied and nurtured.

Private Sector Role

6.3 The private sector will own and operate tourism businesses, and will take business risks, engage in joint ventures, employ, train and improve workforce skills and career opportunities. It will provide suitable value-for-money and client satisfaction at all times by promoting individual tourism products in accordance and association with the country brand identity. The private sector shall collaborate with Government bodies in implementing appropriate tourism development plans and strategies.

Role of Communities

6.4 The role of communities is to identify potential tourism opportunities and conserve natural resources in their areas, organize themselves to engage and seek partnerships with government and established private operators. There is need for communities to also participate in planning and decision making regarding tourism development and promotion of local areas and also in tourism structures at local and national level. The involvement of communities at both the planning and implementation stage will ensure ownership by the communities.

Role of Sector Clusters

6.5 Government will facilitate formation of tourism sector clusters. The clusters will be formed by private sector entities and supported by government to promote collective efficiencies and to heighten product and destination competitiveness as well as local economic development.

Role of Non-Governmental Organisations and the Academic Sector

6.6 The roles of the Non-Governmental Organizations (NGOs) and the academic sector shall include but not limited to the following:

- i. Monitoring the environment, social and cultural effects of tourism growth;
- ii. Support the promotion of community-based tourism;
- iii. Conduct research and information management in the tourism sector;
- iv. Facilitating and updating tourism data and statistics;
- v. Provide an advisory role to government and other stakeholders on tourism development; and
- vi. Lobby constructively and engage government on issues critical to the tourism sector.

Linkages with International Cooperating Partners

6.7 Emphasis will be placed on the enhancement of strategic regional and international partnerships that boost tourism development in Botswana. Government will where appropriate accede to and sign international agreements for the pursuit of enhancing sustainable tourism.

7. IMPLEMENTATION, MONITORING AND EVALUATION OF THE POLICY

7.1 Tourism is a cross cutting sector hence implementation of this policy will require concerted efforts and active participation by all stakeholders in order to ensure growth and maximum contribution of tourism to the country. A Policy Implementation Framework was developed alongside this policy which outlines the main actions to be undertaken with regard to the implementation of the Tourism Policy for Botswana. Other strategies emanating from the core areas of the Policy will be developed. This policy also advocates for the development of monitoring and evaluation tools at sectoral level which is very crucial for effective policy delivery. The policy will be implemented for a ten-year period, effecting from the date of its approval and will be subjected to a midterm review after five (5) years of its implementation.