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Tourism Supply Chain Management: A Catalyst to Development in Africa

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Abstract

The relationship in the tourism supply chain management could in turn be a catalyst towards development of the sector in the continent. This paper explore areas of integration in the tourism supply chain among Regional Economic Communities (REC's) through contextualisation of a comparative advantage to increase the share of the tourism business in Africa as a catalyst to development in the African continent. This paper adopted the text analysis that is used in social science research and involves "drawing inferences from a comparative advantage theory". In this case, large volumes of contents are analysed. Themes that emerged revealed that a well-managed tourism supply chain in the country and in the Regional Economic Communities (REC's) could stimulate the infrastructural development and preserve natural and historical heritage. TSCM has the ability to support the society. There is a dire need to liberalize air flight and visa regimes to benefit from the share of tourism in the REC's in the African continent. The implication is that tourism distribution can be achieved through the recognition of the nature of strategic coordination between partners in the

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RECS and can also improve the performance of the tourism sector in the continent. For companies that are involved in the effective supply chain, they could benefit from coordination and communication through the distribution channels that support the core service or product.

Introduction

Tourism has become an apparatus through which different countries enter and compete within the international financial system to reinforce and improve quality of life (Sifolo cited in Acha-Anyi, 2018). Through the tourism sector, there are greater economic impacts (direct, indirect and induced injection) that affect the Gross Domestic Product (GDP) of a country. Tourism is one of the fastest-growing and most interconnected sector in the global economy with vast potential to boost GDP and investment, spur regional integration, create employment and reduce poverty (African Tourism Monitor, 2016).

The contemporary era of globalization and tourism has afforded unprecedented opportunities to billions of people in emerging markets (Mills, 2018). Both global and regional markets offer new avenues for better growth (AUC/OECD, 2018). In a globalised world, tourism serve as a tool to create closer bonds between countries, cultures and people (Acha-Anyi, 2018). The importance of the tourism sector in different Regional Economic Communities (RECs) in the world, particularly in Africa must not be understated. Tourism generates a significant amount of foreign exchange earnings that also contribute to the economic growth of developed countries. Such ingredients of growth have not been effectively harnessed in Africa (Fayissa, Nsiah, & Tadasse, 2008; African Development Bank, 2019) because the continent's share of the global tourism pie remains small. There is a call for collaboration to achieve an "integrated and prosperous Africa anchored on the RECS and NEPAD" across the continent (African Agenda, 2013). This is reflected in the African Union (AU) Agenda 2063 document (2013), which calls for Africans to invest in human capital to foster the collective commitment towards implementing the agenda. The World African Bank (2019) indicates that if all countries could bring border administration, together with transport and communications infrastructure, up to just half the level of global best practice, global GDP would grow by $2.6 trillion (4.7 percent), and total exports would increase by $1.6 trillion (14.5 percent). Therefore, drawing inferences from the comparative advantage theory by David Ricardo is critical.

Comparative advantage theory advocates for international free trade (Case and Fair, 2007). International trade integration emphasizes the need for countries to be conscious of gains from trade within sub-sectors of the economy (Novignon, Atakorah & Djossou, 2018). This study explores areas of integration in the Tourism Supply Chain (TSC) among RECs through contextualisation of a comparative advantage to increase the share of the tourism business in Africa. According to the African Development Bank (2019, pp. 76), integration in RECs (and in other preferential trade agreements) covers measures that go beyond obligations taken in WTO multilateral negotiations. In this paper, the area of focus will be on tourism supply. Integration into global value chains is a key factor for development and structural change (African Development Bank, 2019), although member countries do not have the same incentives for economic integration.

Literature review

In an attempt to answer the question, where are we, in-terms of the tourism supply chains in Africa, perhaps a background the RECs and sourcing in general will be a good starting point. Global sourcing strategies have changed significantly due to the fundamental economic, technological, social, political and environmental considerations worldwide. Regardless of the shape, size and the nature of a business, global sourcing has become a critical competitive strategy for organisations to ensure maximum benefits. Strategic logistics management and the

supply chain approach should be mainstreamed, not only in the continent's regional infrastructure initiatives, but also in management of trade corridors (Economic commission for Africa, 2017). This trend has also affected approaches of doing business in the travel and tourism industry in the African continent.

The African Union Agenda (2013), calls for the transformation of economies through the tourism industry in the continent. This plea is in line with the Sustainable Development Goals (SDG), which amplifies the important role of tourism as one of the key drivers towards sustainable and inclusive economic growth. There are eight officially recognized Regional Economic Communities (RECs) in the African continent, namely: the Economic Community of West African States (ECOWAS); the Common Market for Eastern and Southern Africa (COMESA); the Southern African Development Community (SADC); the Economic Community of Central African States (ECCAS); the Intergovernmental Authority on Development (IGAD); Community of Sahel and Saharan States (CEN-SAD) and the Arab Maghreb Union (AMU). According to Okharedia (2017), not much has been done by Africa and Middle East respectively by governments to promote tourism when compared to America, Asia and Pacific and Europe. A question then arises, where are we? Sifolo (2016), pointed out that concerted efforts such as cooperation on tourism policies are essential to turn the situation around for the better. Breiling (2016), views value chain as a solution to tourism activities from an economic perspective. The tourism sector demands an integrated, coordinated and a collaborated environment to deliver proper products and services at the highest level of a tourist satisfaction. Hence, supply chain is argued to be a crucial operational concept that should be applied in the Regional Economic Communities for African continent to maximise tourism value.

Perhaps the statistics stating the tourism contribution in the continent with an intention to unpack tourism supply chain management as a catalyst for tourism development is essential. The World Travel and Tourism Council (WTTC), indicated that the total contribution of travel and tourism in 2017 to the Gross Domestic Product (GDP) was USD8 272, 3 billion (10.4% of the GDP), and is forecasted to rise to USD 12, 450, 1 billion (11.7% of the GDP) in 2028 (WTTC, 2018). The statistics indicates that the tourism sector is on the rise in the African continent. The African Development Bank Group (AfDB) recorded US$43.6 billion coming to the continent in 2014. For example, 2017 saw countries such as Tunisia and Egypt that had previously been devastated by the impacts of terrorist activity, recover strongly (WTTC, 2018).This is viewed as a positive indication towards economic growth in the African continent.

Given the heterogeneous nature and fragmentation that exist within the tourism industry, one may argue that there is a need to view the tourism sector in chains, particularly in the RECs in the African continent. Although, the subject of supply chain management has not featured prominently in the study of tourism, perhaps unpacking the concept of supply chain is prudent. There is an emerging consensus that the study of tourism should cover supply chain management considering the growing view of the need to analyse the tourism industry in terms of "chains" (Buhalis, 2001, 2003a, 2003b; Van der Duim & Caalders, 2013, p, 149; Song et al, 2012; Sifolo, 2015).

Methods

This paper adopts the text analysis also referred to as content analysis which is used in social science research for analysing textual data and involves "drawing inferences from data by systematically identifying characteristics within the data" (Clatworthy and Jones, 2001, pp. 317). In this case, the researcher analysed large volumes of contents for the qualitative analysis of large bodies of textual, graphical, audio and video data. Research journals, public documents (continental bodies and nongovernmental sources), books and conference proceedings were the main sources of data.

Tourism supply chain status quo in Africa

Global tourism is a business that caters to nearly one billion people (Mills, 2010). In the World Tourism Barometer, the United Nations World Tourism Organization (UNWTO) projected growth of international tourists' numbers at a rate of 4%-5% in 2018. Although the UNWTO (2018), projected Africa to grow from 5% to 7% in 2018, with North Africa at +10% and Sub-Saharan +6%, reaching an estimated 67 million arrivals. Much remains to be done to truly boost the growth of this industry in Africa, starting with the development of adequate and functional transport infrastructure and services (Bounouar, no date). International tourist arrivals (overnight visitors) increased 6% to 1.4 billion in 2018 world wide (UNWTO, 2018).

Tourism comparative advantage is underutilized in Africa, it only accounts for a mere 4 percent share of the international market (Mills, 2018). Perhaps this is one of the reasons for the United Nations Conference on Trade and Development (UNICTAD) (2018) to suggest that the African market remains highly fragmented. One may raise a question as to what can be done to turn the status quo around. Evidence from the literature indicates a number of factors, which are not only limited to SCM which are discussed below.

As it is, according to Hayes (2018), tourists are "dropping" countries like South Africa and Botswana from their itineraries in favour of other African destinations. Safety concerns, visa restrictions and other issues such as the entry-to-country procedure in SA and Botswana negatively affect tourism growth. Hayes (2018) highlighted easier visas in East Africa (but worse infrastructure), and visa restrictions plus the wait in the borders should one be travelling by road as a challenge. There is a serious lack of a culture of implementation of the strategic instruments and policy application and decisions (AU Agenda, 2013). In the same vein, the Agenda designates that there is a crucial need for a scrupulous and systematic implementation of instruments and decisions adopted by AU and RECs policy organs. According to Okharedia (2017), other challenges faced by the continent comprise inter alia, the following:

- Government inability to formulate and implement progressive policies on tourism,
- the current fight against terrorism,
- unequal distribution of power and influence within the cultural divide ,
- structural imbalances in overall development pattern in developing economies and
- cultural clashes.

Alternatively, Geda and Kebret (2008), point out that the performance of the Regional Blocks in the continent are strained by issues of variation in initial condition, compensation problems, real political commitment, overlapping membership, policy harmonisation, lack of diversification and poor sector participation. These issues appear to possess created building winning economic groupings in continent a frightening task.

All of the above mentioned, have the potential to threaten seamless TSC in the continent because tourism greatest challenge is to provide quality local employment and local businesses sustainability. Perhaps, a definition of tourism supply chain (TSC) is applicable for integration of the tourism industry in the continent. Đorđević (2010) defined TSC as a "network of tourism organizations supplying different components of tourism products/services such as flights and accommodation for the distribution and marketing of the final tourism products at a specific tourism destination, and involves a wide range of participants in both the private and public sectors". For example, Gambia has plans to expand its road network to connect previously isolated areas of the country and to facilitate tourism; this expansion will include the installation of weighbridges (African Development Bank, 2019). Whilst achieving a dream to improve the tourism sector, development takes place. Moreover, global evidence suggests that countries such as Kenya, Mauritius, and Senegal faced very favorable growth opportunities, while Mauritius managed to capitalize on its low transport costs and abundant labor by developing a strategy to attract domestic and foreign investment into export-oriented manufacturing. (Eifert, Gelb and Ramachandran, 2005). Conceivably, a prominent feature of the development of tourism is the fact that marketing plays a critical role in promoting tourist destinations directly or indirectly.

Therefore, opportunities exist in the tourism supply chain for the continent to prosper. According to Dairon (2016) cited in UNICTAD (2018), one of the competitive advantages is based on the productivity, cost of production, infrastructure, and business environment of the RECs. Dieke (2002) and Dairon (2016) concurs that, African governments must play a role in formulating appropriate policies and strategies for human resource development in tourism. Morover, Dairon (2016), further claims that the RECs have the potential have a solid impact on regional employment; complementarities among countries could be identified, potential development of regional infrastructures; and the are probabilities for innovation and research & development (R&D). Dieke (2002), pleads with the governments to support continental and regional structures to encourage private initiatives and, in particular, African entrepreneurs. There is a call to prioritise export value in the continent by investing in human capital (AU Agenda, 2013). If properly conceived, government intervention in the tourism sector can play an important catalytic role to create institutional mechanisms that bring together governments and private entrepreneurs, thus avoiding damage that may be caused if they work at cross-purposes (Dieke, 2002). The study conducted by Ezeoha, Okoyeuzu, Udu, and Edeh (2018) focusing on ECOWAS and COMESA on armed conflicts and Intra-regional trade flows observed that regional economic communities to concentrate their integration efforts towards mitigating domestic and cross-border armed conflicts. It is therefore critical to take note of the African Union Road Map, which calls for increasing the depth of integration while embracing African diversity.

Where are we? A comparative advantage lens

This paper explores a comparative advantage theory, which advocates for "a country to specialise in production of those goods it produces most efficiently and to buy the goods it produces less efficiently from other countries, even if it means buying goods from other countries that it could produce more efficiently itself" (Conway, 2009) as a step towards promoting TSC. Meaningful and effective functioning of trade blocks in the African continent have been slow due to several challenges (social, economic, and political challenges) experienced by different countries (Case and Fair, 2007). In addition, Geda and Kebret (2008) note that implementation and limitation of insight from both theoretical and empirical literature for the African continent is a challenge. The UNICTAD (2018) contends that around 80 per cent of all intra-African trade flows through Regional Economic Communities (RECs) and 20 per cent flows outside trade agreements. Although the UNICTAD's focus was mostly on agriculture, there are still industries where by the intra-Africa trade is not fully explored particularly the tourism sector. This study seeks to make use of a theoretical explanation to contextualize the position of the RECs in the continent through the lens of a comparative advantage theory as a contribution to the literature.

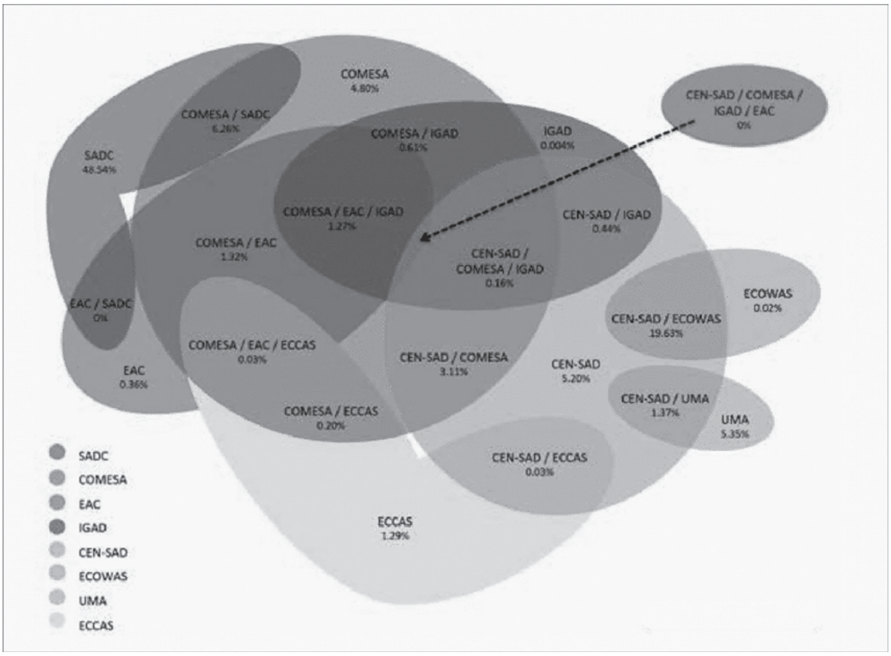
A compendium of Supply Chain Management by Boateng (2016) defines comparative advantage as *a "principle on the assumption that an area will specialise in the production of goods for which it has the greatest advantage or least comparative disadvantage*". From the definition above, one would expect the RECs to trade the goods they specialise in producing. Great examples are drawn from the study conducted by UNICTAD (2018), which revealed the network analysis of four countries (South Africa, Côte d'Ivoire, Kenya and Morocco) in Africa represent central players in trade networks. Within an intra-African trade network, South Africa is the most important hub connecting SADC to all the other RECs in the region (UNICTAD, 2018), whilst, Guinea, Kenya, Egypt, Côte d'Ivoire and Uganda are highlighted as regional hubs in 2015 (IMF, 2016). In other words, Côte d'Ivoire, Kenya, South Africa and Morocco understand their comparative advantage in their RECs and in continent. A study by Scerri, cited in Muchie, Osha and Matlou (2012), Egypt, Morocco, Tunisia and South Africa major part of the economic growth in these countries is in services sector (construction, banking, ICT and retailing); whilst Algeria, Angola and Nigeria are the continent's main gas and oil exporters. The law of comparative advantage point out that when countries trade with each other, it can lead to a win-win result (Conway, 2009). In the tourism industry, when the economies of different countries are integrated, common characteristics of international and domestic tourism tend to bring tourists to the same attractions and facilities (Kastarlak & Barber, 2012). The intention to be part of community within the entire value chain and to understand the competitive ground of the RECs becomes critical.

This study contribute towards informing strategic plans concerning the inclusion of supply chain in the tourism industry. By entering regional agreements, Hill (2007), postulates that groups of countries aim to reduce barriers more rapidly that can be achieved in the auspices of the World Trade Organisation (WTO). However, there are concerns that may arise with integration in the African continent. Many producers based in African countries fall short to compete in domestic and regional markets due to many challenges such as the lack of infrastructure and supporting processes that leads to high unit cost (UNICTAD, 2018). However, countries like South Africa, Nigeria, Algeria, Cote d'voire and Comoros were highlighted as other countries in the continent that have an intra-African trade network. The UNICTAD (2018) indicated major players in the continent. However, contenders may argue that some countries must take a lead for trade to prosper.

For example, the contenders of the comparative theory argue that it is too simple and have a lot of assumptions among other things (in reality, internal protection and monopolies endure that markets are not), that there is full employment and that displaced workers can easily have other jobs of which they can just be as pro-active (Conway, 2009). Countries give up some degree of control over key issues such as monetary, fiscal (tax) and trade policy (Hill, 2007). African countries must liberalize their economies to grow and embrace globalization and trade with the rest of the world (Mills, 2018). According to African countries must also make their business environment much friendlier to domestic and foreign investors (Mills, 2018). The contemporary era of globalization has afforded unprecedented opportunities to billions of people in emerging markets (Mills, 2018).

Clarifying the REC's demarcation makes it easier for travel and tourism companies to promote intra-Africa trade. Figure 1 shows the current status of the RECs and their overlapping membership.

Figure 1: The eight RECs and their overlapping memberships



Source: UNICTAD (2018)

The overlap and the fragmentation that exist among the RECs affects trading in the services sector. Although, Africa trade through packaging, having tour packages does not only promote marketing, the businesses are able to source cheaper products from other suppliers in the region. This process may yield long term relations and maximum benefits through value creation for both intra-regional and inter regional organisations. When one considers supply chain as a comparative advantage, the REC's need to embrace the Tourism Supply Chain Management (TSCM) as a network of suppliers within the tourism environment. Supply Chain (SC) is described as a chain of networks linking different 'actors' (companies) for smooth flow of material from one point to another (Cruz-Gonzaloz et al., 2015). This will provide a competitive advantage for the RECs'. TSCM embraces a flow of product and services from raw materials manufacturers, intermediated products manufacturing and processing, end product manufacturers, packaging, transportation and storage, wholesalers, retailers, distribution and sales and consumers use and end life in the tourism industry as a platform to compete for the international tourism market (Sifolo cited in Acha-Anyi, 2018). There is a need to encourage local and regional processing and the development of African industrial supply chains (ECA, 2017). The establishment of the Continental

Free Trade Area (CFTA) is gaining speed, with the African Union (AU) aiming to get the CFTA agreement in place. There is a call to increase participation in cross-border supply chains by reducing trade costs through regional integration (African Development Bank, 2019, pp. 106). If fully implemented, the CFTA could increase intra-African trade significantly and promote structural transformation by providing a lever to industrial development in African economies. African countries have participated little in global trade supply chains except in upstream activities as providers of unprocessed goods and raw materials (African Development Bank, 2019, pp. 106).

Managerial implications and solutions

Areas of integration within the tourism sector remains minimally shared among countries in the continent. There are broader challenges that are affecting the growth of tourism in the continent. An inability to formulate and implement progressive policies on tourism and structural imbalances in overall development pattern in developing economies are among broader challenges. To realise competitive advantage and to create value chain, perhaps considering clarifying the African continent integration opportunities and the capabilities of countries is essential. Starting with identifying success stories among Tourism Regional Organisation is important. Such offices could come up with the procurement supply chains requirements to meet specific standards, or safeguards, to tender for public sector contracts or doing businesses together. These offices must be under the RECs recognized by the African Union and must have a better understanding on the processes that requires the involvement of other tourism suppliers for long term purposes. A tourism developmental book by Acha-Anyi (2018), presents solutions for igniting Africa's economic development. More success stories such as integrated regional framework initiatives that have been identified in the REC's makes it easier to sell tourism packages because the REC's forms part of Africa's oceans, seas / seabeds, lakes, rivers that are tourist destinations. Such attractions symbolises the opportunities that exist within the Africa's Blue Economy (Sifolo cited in Acha-Anyi, 2018). Therefore, it is crucial for tourism operators to take due cognisant of the aims and objectives of different REC's for comparative advantage purposes.

Evidence from literature indicates that well-managed tourism in the country and in the REC could stimulates its infrastructural development and preserve natural and historical heritage, which support the society as a whole (McNeely & Thorsell, 1989; Booyens, 2010; Christie & Crompton, 2001; Weston, Davies & Guiver, 2015). Moreover, emergence of more direct flights into Africa as well as the stronger focus on tackling visa regulations and exploration of e-visas, is a positive step toward capturing – and holding – the African continent's portion of the potential Chinese travel market (Hayes, 2018). To increase its share of the tourism business, Africa will have to liberalize air flight and visa regimes (Mills, 2018). For example, one of the AU flagship projects includes a cost-benefit study which include five East African Committee (EAC) countries (Uganda, Rwanda, Burundi, Tanzania and Kenya). The projection is that complete liberalisation of air transport among the EAC Member States could result in addition 46,320 jobs, US$202.1 million per annum gain in GDP, traffic increase by 46%, fares reduction by 9% on average and increase in frequency by 41% on average (AU Agenda, 2013). Herweijer, Celine et al. (2018) ascertain that in Manufacturing, circular global supply chains could be more quickly realised utilising the "Industrial Internet of Things" (IIoT) coupled with AI, robotics, virtual reality, drones and advanced materials. Takele (2019), purpots that successful improvement in African countries' trade logistics performance including logistics infrastructure, customs clearance, and logistics service quality will enhance trade between African countries.

Cooperation can assist in strengthening the importance of good governance to improve service delivery as a strategy to increasing foreign direct investment within the continent (Sifolo, 2016). Lack of clarity on the REC's demarcation and cooperation may negatively affect the dream of the Africa we want. Long-term relations together with clear supply chain management links may be only a dream. In his inaugural speech, Prof Patrick Lumumba (2018) posed a question…. *Why is it Africa, produces what it does not consume and consume what it does not produce*? Perhaps TSCM can be a catalyst towards tourism development. Intra-regional trade flows observed that regional economic communities to concentrate their integration efforts towards mitigating domestic and cross-border armed conflicts.

Conclusion

Therefore, for effective tourism planning and development in the African continent, adhesive links such as purchasing and supply management are essential as a competitive advantage and for prosperity of any tourism organisation and to ensure customer satisfaction is paramount. There are maximum benefits through value creation for both intra-regional and inter regional organisations operating within the tourism supply chain in Africa. Building and managing hospitality and tourism partnerships/collaboration is paramount. Greater participation in tourism supply chain trade at both the regional and global levels, where goods have to cross borders multiple times is a solution to promote TSC in the continent. A qualitative research study from the RECs for future research can be conducted to identify the similarities and the stakeholders in the TSC.

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