

University College London - Bartlett Faculty of the Built Environment – Development Planning Unit (DPU)

Analysis of Sierra Leone's medium-term development plan

Challenges ahead of the tourism sector

MSc. Urban Economic Development

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10-15-2020

Abstract

Sierra Leone has experienced several disasters since the 1990s, ranging from civil conflicts, natural hazards and pandemics. Nevertheless, the post-disaster recovery periods have highlighted the various assets the country has that allowed it to generate rapid growth. Development indexes have mostly been on an upward trajectory. In 2018, the government released a medium-term national development plan that defined a path for the nation's progress. The authors divided the plan into several policy clusters that covered the various socioeconomic, cultural and institutional dimensions of development. One of the particularities of this plan was the intensive participatory process through which it is designers conceived it. In this paper, we look at the challenges ahead of the implementation of this plan, specifically for the tourism policy sub-cluster. The dissertation focuses on three enablers of tourism development: air connectivity, tourism labour market and the sector's institutional environment. It analyses the existing setting and positions the national plan as the background context, before diving into each of the enabler's challenges and gaps that the government strategy does not highlight sufficiently.

Keywords: Sierra Leone, tourism; development planning; air connectivity; tourism labour markets; tourism institutions

Acknowledgement

This master's dissertation is written in the context of a fellowship awarded by the Government of Sierra Leone – Ministry of Planning and Economic Development in collaboration with the Development Planning Unit – Bartlett Faculty of the University College London.

Being selected to work on a project with such realistic dimensions is a privilege, and I am grateful for the trust that the fellowship managers have put in me.

I would like to thank my supervisor, Dr Daniel Oviedo, for his guidance and patience throughout the development of this topic, as well as Ms Victoria Gonsior for her help in gaining a better understanding of the local context.

Finally, I would like to thank my parents and my brother for their emotional support and care.

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1. Introduction

In Sierra Leone's Medium-Term National Development Plan (MTNDP) released in 2019, tourism programs were carefully conceived to address several aspects of an industry known for its numerous layers of complexity and its multidimensionality.

When analysed more carefully, Sierra Leone faces more significant challenges in some fields that may impede the entire vision for tourism development. For example, the country still faces severe gaps in air connectivity compared to regional standards: Lungi airport has only ten non-stop destinations, compared to 37 in nearby Senegal (See Figure 5 in appendix 1 for data set). The plan's data shows a significant difference in terms of tourist arrivals compared to other neighbouring countries as well. In terms of human resources, data also shows that 51.4% of tourism and hospitality sector employees have not undergone appropriate training in this particular field (Statistics Sierra Leone, 2020). On the institutional level, the negative image, corruption and ineffective coordination mechanism, between the private and the public sector, impede the growth of the sector in a sustainable and inclusive manner (Shakya, 2009).

Furthermore, the real difficulty lies in achieving not only economic growth but sectorial development in line with the MTNDP's spirit. Great destination attractiveness should bring the most well-being for its residents on a sustainable basis(Dwyer and Kim, 2003). With its cross-sectoral outreach and a contribution to 10% of the world's GDP in 2015, SDGs 8 (Decent work and sustainable economic growth), 12 (Responsible production and consumption), and 14 (Life below water) (*Tourism & Sustainable Development Goals – Tourism for SDGs*, no date) directly mention reforms in the tourism sector. Tourism planning has the potential, even the moral obligation to expand through sustainable frameworks in order to provide a healthy and inclusive impact on local residents (Dwyer and Kim, 2003).

In order to envision a resilient touristic sector that can contribute to the economic development of Sierra Leone, challenges need to be identified, dissected and analysed. This process can manage obstacles and turn emerging opportunities into assets. So which challenges today present a threat to the implementation of the MTNDP's tourism strategy? How do they materialize, and to which core issues can they be traced?

2. Background: Sierra Leone's Medium-Term National Development Plan

Sierra Leone's government released the MTNDP in 2019, following the election of a new president the preceding year, as well as the formation of a new government. The aim of the plan is pursuing a steady trajectory for human development, guided by several global and internal agendas such as providing accessible education for all and relying on it for development. The MTNDP overlaps as well with the United Nation's 17 Sustainable Development Goals (SDGs), the Africa Union Agenda 2063 and the G7+ Peacebuilding and State-building Goal. This strategic heading comes as an extension to the effort that started in 2015 to integrate the SDGs in national policy frameworks, an initiative that materialized further when they were integrated into 2016's national budget (UNDG (United Nations Development Group), 2016). Furthermore, it is essential to note that like most mid-term development plans, the MTNDP's timeline is limited by the mandate of the democratically elected political government that conceived it (Chimhowu, Hulme and Munro, 2019; Government of Sierra Leone, 2019). In this case, the plan's implementation deadline is set for 2023, or by the end of President Julius Maada Bio's term.

As mentioned in the MTNDP, this plan reflects a shift from the traditional poverty reduction approach to providing a long term and sustainable development framework. This shift is rooted in the need for resilient progress in the face of unexpected hazards, whether they are economic (e.g., Iron Ore price drop in 2014), humanitarian/sanitary (Ebola Crisis in 2014), natural/urban (mudslides in 2017), or other. It also puts forward the context of post-conflict recovery that reigned since the end of the civil war in 2002, highlighting the socio-economic progress while acknowledging the multitude of challenges the country still has not successfully overcome.

Inclusive development and social wellbeing is the principal concern for the government. Several areas mirror this opportunity, particularly the method used to build the basis for the policy recommendations. Around 2 million Sierra Leoneans were consulted during the preparation process, the equivalent of the third of the population. Town halls, surveys and several levels of discussion platforms were set up across the country to allow a practical bottom-up approach to development planning. The plan's designers also invited various political parties, development agencies, experts, unions and private sector actors to share their vision for Sierra Leone's development, in a massive effort that saw the use of social media, radio, TV and different types of communication tools put to the use (Government of Sierra Leone, 2019). To

diversify the scale of the approach and integrate micro-level measurements into policy design, the MTNDP succeeded to the publication of *Sierra Leone's Integrated Household Survey in 2018* which constituted one of the leading quantitative foundations of the MTNDP.

As mentioned earlier, the plan aligns itself with various agendas, notably the 17 SDGs. The overlap between the government's vision, analysis of the context and the global development trends has resulted in four goals:

- **Goal 1:** A diversified, resilient green economy
- **Goal 2:** A nation with educated, empowered, and healthy citizens capable of realizing their fullest potential
- **Goal 3:** A society that is peaceful, cohesive, secure, and just
- **Goal 4:** A competitive economy with a well-developed infrastructure

These goals fit within a broader perspective guided at prioritizing Human Capital Development, as well as diversifying the economy, monitor and ensure successful implementation, develop infrastructure in all areas and promote a resilient, competitive economic environment. The plan reflects these goals in eight policy clusters, divided into sub-clusters that usually echo the industrial or sectoral composition of the broader section. The plan of action defines a strategic objective to outline the benefits of the government's intervention. It then sets key targets to reach by 2023, usually in quantitative terms (Amounts, duration, and other.). Finally, a list of engagements, titled "Key Policy Actions", define the practical implementation steps to be taken to accomplish the sub-clusters targets. A context description precedes this framework and a list of challenges the sector faces.

The second volume of the plan follows the same cluster and theme structure as the first. However, it deals with implementation and monitoring mechanism for each sub-cluster. Three outcomes reiterate the critical targets from the first volume in each sector. They guide a framework of execution that draws a path from national targets to specific programs and specify the stakeholders and inter-sectoral links concerned (Refer to appendix II for illustration).

2.1. Focus area: Tourism

This work will look specifically at section **2.3: Revitalizing the tourism sector**, part of **Policy Cluster II: Diversifying the economy and promoting growth**. In the spirit of assessing challenges ahead of the MTNDP, this assignment targets tourism for several reasons. First, regardless of the MTNDP's qualitative assessment of the potential of tourism in Sierra Leone, which highlights its natural, heritage, ecological and leisure components; the quantitative data gives further evidence of strong demand for it (Statistics Sierra Leone, 2020).

Table 1: The selected programs to be analysed in this study, compiled by the author (Sierra Leone's Medium-Term National Development Plan 2019-2023 Volume II, 2019) – Refer to Appendix II for the entire implementation strategy

Theme	Policy	Global connectivity	Labour market and skills
Program	<ul style="list-style-type: none"> • Review Policy regulating and promoting tourism 	<ul style="list-style-type: none"> • Promote the arrival of more airlines • Reduce some taxes on airline tickets 	<ul style="list-style-type: none"> • Facilitate and regulate the hotel and tourism training institutions • Review the curriculum to international standards • Train to have SL brand
Stakeholders	NTB, AG's office	NTB, MOF, Transport ministry	NTB, MBSSE, Private sector

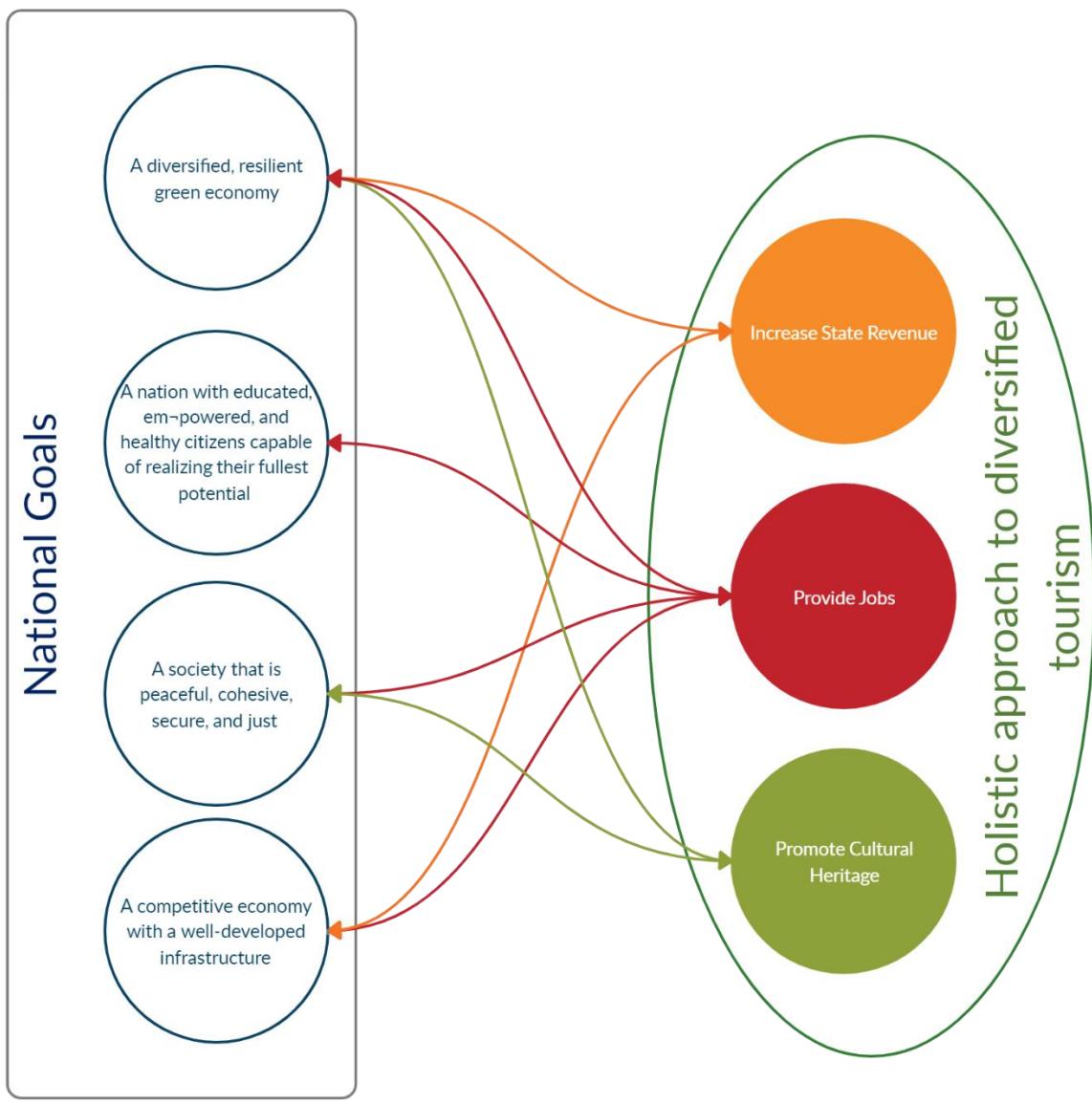


Figure 1: Positioning the role of tourism within the MTNDP in the context of the four national goals (author's own, information taken from Sierra Leone's Medium-Term National Development Plan 2019-2023 Education for Development, 2019)

Figures 2.2 and 2.3 of the MTNDP (Page 77) display a consistent growth since 2010, only to be struck negatively by the Ebola Crisis in 2014 and 2015, but then bounce back immediately in 2016 with a 300% growth rate. Furthermore, as the literature review will display, the tourism industry has the potential to create rapid economic growth while enhancing sustainability and inclusion factors, as well as heritage conservation habits. It is also an industry that cuts across all sectors directly and indirectly, which

translates into a spillover effect that benefits the entire economic structure of the country. Finally, the diagram in Appendix I shows the considerable overlap between the strategies put forward for this sector precisely and the four goals of the national plan, which highlights the importance of revitalizing it. So what challenges lie ahead of implementing Sierra Leone's Tourism strategy as presented in its MTNDP?

3. Scope & limitations

As the timeframe and resources for this study are limited, it is essential to note that the analysis cannot be comprehensive for several reasons. First, the inability to perform fieldwork in Sierra Leone and engage with stakeholders reduces this study's ability to address household-level correctly. Second, and as a consequence of the nature, size and duration of this dissertation, it will only be addressing three challenges ahead of the implementation. The choice behind these challenges will privilege their relative importance and the general need to provide more information about them. Finally, the Covid-19 pandemic will be mentioned separately at the end in order to link the MTNDP with the inevitable economic downturn looming at the horizon, and contextualize the project. However, given the early stages of this crisis and the lack of information so far, the section will be limited to qualitative predictions and will not include an in-depth analysis.

4. Literature review

4.1. National development planning

Economic development planning is a notion deeply rooted in the necessity of government intervention in the economy, as opposed to neoliberalism, where the law of supply and demand dictate growth, expansion and the resulting socio-environmental context. It stands in opposition to a "laissez-faire" method, where non-intervention hinders government intervention and renders it rarely significant (Makarem, 2014; Chimhowu, Hulme and Munro, 2019). These strategies have emerged as a means to reconcile economic growth with the notion of Development as an empowering and freeing concept revolving around three principles: (1) Efficiency, (2) Equity and social justice and (3) Sustainability (Zhang, 2015). This new approach indicates a paradigm shift from neoclassical economics that rely on non-intervention on behalf of the state to correct market failures or tend to inequalities. Therefore, national

development plans rely on political economics instead of market economics (Söderbaum, 2018; Stiglitz, 2018).

Since 2006, the number of countries with similar schemes has more than doubled (Chimhowu, 2018). National economic development plans focus specifically on a country's economic sectors, and related enablers for growth (Maine and Nash, 1987).

Since 2015, a significant number of development plans from both public and private sectors have been steered towards achieving the 2030 Sustainable Development Agenda, a pledge signed by all 193 members of the United Nations (*National Planning in the Global South*, 2020). More practically, this agenda defines 17 objectives, known as Sustainable Development Goals (SDGs) as pathways towards achieving economic prosperity, social justice and environmental protection across the globe (Sustainable Development Goals, 2020).

Local and regional governments have integrated bottom-up approaches through dialogue at several levels in order to convey concerns of households and local entities in broader scale development strategies. However, a growing critique of the traditional use of *communicative planning* has established specific differences between the use of terms such as “participation” and “collaborative” (Macarthy, Frediani and Sulaiman, 2019). It is vital to use dialogue and listen to various voices when engaging in community development. However, a constructive result needs to happen foremost through a shared process and experience (Ruff, 2017). “Participation *as* planning”, and not “Participation *in* planning” has proved to be a more efficient and inclusive process to empower local communities in the Global South (Frediani and Cociña, 2019). The latter approach is a recognition of some “blind spots” not taken into account by collaborative planning, which tends to focus on consensual results rather than confronting dichotomies and social conflicts. “Participation *as* planning” also has the power to equip residents with the necessary knowledge to confront potential legal threats, root causes of poverty and social injustices, helping achieve sustainable development by themselves. Finally, comprehensive participatory approaches need to extend through its different phases, from planning, implementation, monitoring to evaluation (Kilroy, 2011).

4.2. Growth and competitiveness

Studies have shown that the concept of competitiveness aligns with sustainability, inclusion and growth. Economic growth, when approached from a social justice and developmental lens, is key to achieving the UN's 2030 agenda and fits within the 17 SDGs framework (Andreoni and Miola, 2016). National competitive advantage is a notion famously attributed to Michael Porter, as he goes beyond the traditional theories of comparative advantage and specialization introduced by Smith and Ricardo. Comparative advantage builds on existing resources in a destination, while comparative advantage focuses on the efficient use of these resources and the creation of a competitiveness enabling environment (Crouch, 2004). Porter's diamond sets four conditions to achieve competitive advantage: Factor conditions (infrastructure, skilled labour), demand conditions (The presence of a robust home demand market that pressures innovation), related and supported industries (supply chain or related industries that act as enablers) and finally firm strategy and structure (the constant drive for innovation, product and quality updating, and internal management of firms).

4.3. Tourism as an economic sector

Academic and professional literature emphasize the ambiguity, even the absence of a defined entity that can englobe the tourism industry as a whole. Instead, it looks upon tourism as a sector composed of interlinked industries, such as aviation and transport, accommodation, food and beverage, leisure facilities, entertainment, culture, and others (White, 2013). The users of these services are not restricted to one category, as the industry may refer to them to as "guests", "visitors", "tourists", "clients", "passengers" or any other type that makes it hard to measure the share of tourism in one activity domain effectively. The same relationship impacts labour and individual business classification: Museums, for example, can fall under cultural or touristic landmarks. Restaurants, travel agencies and similar operations intersect with several sectors (Baggio, 2018). Therefore, the impact of touristic activity involves seemingly unrelated economic sectors as well, such as agriculture, construction, health and others.

The United Nations World Tourism Organization (UNWTO) defines tourism as the activities of visitors in destinations outside his/her usual environment, for less than a year, for any primary purpose (business, leisure or other personal purposes) other than to be employed by a resident entity in the country or place visited. Since these activities involve trading products and services between residents of a destination and

external parties (visitors), tourism is considered an export and contributes positively to the trade balance of an economy (Payam, 2017). Therefore, the growth of the tourism industry depends on competition within a larger market (regional, national and global) and the ability to increase total trade value through higher quantities or amounts (Perles-Ribes *et al.*, 2016). The mechanism defining this sector is unique in the fact that the consumer travels to the supplier, and not vice versa like manufacturing or agriculture. This particularity ties any exchange between the two parties involved in the global market, regardless of its size and nature. For example, local tourism operators export every time they sell a piece of fruit, and hotel accommodation or a landmark visiting ticket to a visitor (UNCTAD, 2007). Hence, local tourism is affected by global factors and is required to compete on a worldwide level to attract customers.

Tourism is also characterized by the cross-cutting mechanism that links it to a broader network of economic sectors, such as hotels, restaurants, resorts, tour operators, international and local travel, construction, and others (UNCTAD, 2007). Furthermore, the local institutions, social environment, financial and economic ecosystem, physical environment also define the industry's (Panasiuk, 2007). All together, these components make up the infrastructure of the tourism industry and therefore become the leading domestic determinants of its growth, shape and model. Therefore, achieving healthy and sustainable tourism requires strategies that develop these components.

On a larger scale, tourism was responsible for 9% of Africa's total exports, compared to 7% on a global scale. The continent witnessed at 6% and 4% increase in tourist arrivals and tourist receipts respectively, while a decade ago they were at 4% and -5% (*Global and regional tourism performance*, 2020).

4.4. Tourism for economic development

Policy specialists often describe tourism as an enabler for economic development. Specific impacts are correlated with the specific category of tourism a region offers, as well as the socioeconomic and political factors that structure the latter (Sharpley, 2009). Since this industry is susceptible to providing high yielding exports and attract foreign currency, governments have relied on it to revitalize, diversify and grow national economies. They have also considered its various spillover as a catalyst for local economic development. The sector's broad connectivity and direct/indirect links with a wide range of industries pushed national governments to invest in this sector and conduct planning schemes that privilege its output (Stobart and Ball, 1998). Furthermore, the increased globalization pushed residents to become

more attached to their local landmarks and potential, which incidentally introduced a new perception of tourism as a local phenomenon inseparable from its surroundings (Pedrana, 2013). Tourism strategies that target sector development focus on providing a unified vision in terms of resource use and allocation, as well as infrastructural projects in other areas as a means to increase tourism efficiency (Crouch, 2004).

This particular sector uses a destination's assets, from humanmade attractions to natural environments as resources in order to attract consumers (Pedrana, 2013). This relationship with the territory has consequences on it, such as heritage and nature conservation, employment and economic growth for local populations, social and educational development, injection of foreign currencies, valorisation of local landmarks and other. However, there can also be grave negative externalities as a result of the growth, especially in terms of congestion, pollution, resident ousting from city centres, real estate price increases, damage to biodiversity and other adverse impacts (Crouch, 2004; Pedrana, 2013; *The Australian Financial Review*, 2018; Koens, Postma and Papp, 2018).

4.5. Destination attractiveness, competitiveness and enablers of growth

Competitive tourism is aligned with sustainable development, and does not entail a lack of concern for the environment or social justice, but acts as one of their enablers (Hassan, 2000). Some may measure it with empirical indicators that address the quality and size of the market (quality of the tourist experience, number of passengers, nights per passenger, sector growth, contribution to GDP). In contrast, others evaluate destination competitiveness by the economic prosperity of the population and area, supplying the service (Dwyer and Kim, 2003). As such, destination attractiveness, or competitiveness, will be used in a context that practices tourism for local economic development, all while respecting the three key targets dealing with sector growth, job creation and heritage promotion.

Authors differ from one another in regards to the criteria by which success in this industry should be measured. In their analysis of tourism development planning in the areas of Kretek, Bantul, and Yogyakarta in Indonesia, Wijayanti and Dewi (2016, p.3) use the legal framework consisting of four interrelated pillars: Tourism **destination, marketing, industry** and **institutions/human resources**. Each pillar is composed of indicators, policies, standards and developmental factors that contribute primarily to the wellbeing of the residents of a destination, and to a lesser extent the industry's growth. However, this framework remains quite simplistic in its dimensions, compared to the one presented by Crouch

(2004, p11). Crouch's model (Cf. appendix) combines comparative and competitive advantage theories, tourism components as well as cross-sectoral agents to define the order of elements that shape destination competitiveness. Crouch's model was preceded by Hassan's (2000, p3) market competitiveness framework in the context of sustainable tourism. However, it focuses primarily on **market and image factors** from a business-development perspective that boosts the **demand mechanism**. In figure 9 (Appendix IV), we can observe a model by Dwyer and Kim (2003, p11) that combines the preceding approaches.

Most importantly, it highlights the separates roles of both private (**industry**) and public sector (**government**) in the **destination's management** while illustrating the strong connection between them. It provides a new understanding of **destination resources** and **situational conditions**. One of the main differences with Crouch's model is the emphasis of on-demand as a regulator between **competitiveness** and **resources**. Finally, and perhaps most importantly, the framework shows the exact measurement of competitiveness with **socioeconomic factors** relating to **the resident's quality of life**.

In summary, the central debates surrounding destination competitiveness revolve around models, and orders that structure the fundamental components in different manners. However, the enablers themselves are very clear and revolve around one central theme: Tourism infrastructure. In a broader context, tourism infrastructure regroups hard (Transport, buildings, physical landmarks, telecommunication) and soft (Governance, socioeconomic context, destination image, events, experience) (Portugal-Perez and Wilson, 2012; Seetanah *et al.*, 2016).

4.6. Air connectivity as a determinant for tourism development

Air travel is today's primary transport means for international tourism, and hence one of its primary enablers. Several indicators evaluate its performance, notably passenger arrivals, number of direct routes, seating capacity and others (see appendix – figure 12 for all indicators) (Sentance *et al.*, 2017). Civil aviation and its contribution to economic, urban and tourism development grew exponentially after the liberalization of the industry by the end of the 1970s and mid-1980s. The removal of barriers made air travel more accessible, affordable and flexible. It also led eventually to the rise of low-cost carriers that fed on a previously untapped market (Olipra, 2012; Zajac, 2016). The availability and frequency of air travel are also indicators of the healthiness of a country's tourism industry. For example, during Egypt's

riots in 2011, most airlines interrupted their service to the country until the situation improved. West African countries witnessed the same rapport during the Ebola crisis (Government of Sierra Leone, 2019).

On the other hand, low-cost carriers play a significant part in the development of lesser-known cities who may have smaller airports and are distant from major urban centres. As price is the primary determinant in low-cost travelling, rural and peri-urban destinations have managed to attract visitors because of these cheaper transport alternatives. An increase in foreign direct investment and a contribution to a positive balance sheet accompanied this phenomenon. Local areas saw increased development, and residents became more involved in the local tourism industries, especially with the preservation of the sector's assets. In summary, healthy air connectivity with regional and international destinations is key to equitable tourism growth; and can have spillover over various tranches of the sector if made accessible.

4.7. Tourism and labour markets

Tourism is considered a "Labour Intensive industry" (Saner, Bahcelerli and Eyupoglu, 2016). This characteristic indicates that the sector relies heavily on human resources, both in quantity and quality, to produce its output (Piham, 1982; Kenton, 2019). Furthermore, all businesses in the tourism industry consider customer satisfaction as the leading standard or benchmark by which they measure success, which necessitates a series of soft and hard skills acquired mostly through practice and experience (OECD, 2012a; Cass, 2014). Labour-intensive industries can contribute to sustainable employment and skill development since they are less prone to automatization or digitalization. This relationship is partially related to the importance of the general tourism experience factor, which relies heavily on individual interactions between the visitor and the service provider. As such, tourism labour is an asset in itself, and should be considered as human capital rather than a variable cost. Skilled labour in various touristic operations (restauration, hotels, resorts, cultural and natural landmarks, etc.) is essential to their wellbeing and their sustainable development. Another characteristic of this market is its seasonality, as employment figures variate in correlations with the periods of high tourist affluence (E.g.: Winter for skiing activities, religious holidays for pilgrimage, summer for coastal activities, etc.). As a labour intensive sector that has a strong socioeconomic influence and a high turnover, tourism offers job opportunities for youth, entrepreneurs, minorities, inexperienced individuals and informal workers. It is characterised by a higher potential for inclusive hiring and developmental spillover that lead to household and community

empowerment. In Ireland for example, statistics show that on average, tourism sector employee are three years younger than workers in the global economy (World Tourism Organization and International Labour Organization, 2014). On the other hand, skilled labour in this field increases competitiveness and productivity within the international landscape, and can constitute a comparative advantage especially on the regional level. Training and education enhance productivity and competitiveness, as well as efficient matching between supply and demand. An improvement of labour conditions and wages is also vital to promote the sector's attractiveness to residents and even expatriates who can contribute in terms of international experience and know-how.

4.8. Tourism institutions

In the fields of economics and development, Institutions refer to the set of laws, traditions, governance mechanisms and organizational hierarchies that regulate and shape activities on behalf of the public sector and local communities (Wiggins and Davis, 2006; Ferrini, 2012). Tourism institutions, therefore, relate to all regulatory frameworks that define its output and how they manifest themselves (*Economic Institutions*, no date; Jiang *et al.*, 2019). Most studies have highlighted the immense impact of formal institutions (government bodies, laws, official economic and political actors) on the progression of the tourism industry through institutional barriers that may impede free and unobstructed growth. However, there is growing evidence that the inclusion of informal agents in planning processes contributes to the sustainable development of the tourism sector, especially for the accommodation industry. The complex relationship between formal and informal institutions is unique to each context, but it is through the acknowledgment and analysis of this dynamic that partnerships can be created, and the planning process can be efficient. Informal institutions can be successfully formalized if the appropriate time is accorded and bottom-up approaches are implemented alongside top-down procedures from higher government levels (Cooper *et al.*, 2018; Jiang *et al.*, 2019). The “institutional environment” encompasses these dynamics and relationships between formal and informal institutions. Researchers consider it as an endogenous power that impacts local businesses and their output for better or for worse. For these reasons, mapping this environment is crucial to any planning process that aims to render local production more sustainable, not only for tourism but any economic sector (Du, 2018).

5. Framework

Identifying challenges ahead of the implementation strategy requires an understanding of how its authors developed the plan. It also requires the identification of what they hoped to achieve through which tools. The literature review gives us a broad understanding of national development planning and its economic benefits. It also explains how tourism contributes to the latter, and which elements are essential for the sustainable growth of the sector. Therefore, it is essential to identify the critical links between tourism's essential pillars, the MTNDP's objectives and the implementation mechanism. The baseline conditions chosen are air connectivity, labour markets and institutions. The MTNDP's targets are interrelated with these conditions, as they inspired them, and depend on their availability for achievement. The vision defined by these targets comes from these industrial enablers. This interrelationship exists because of the structure of tourism as a sector, and which components it needs to develop.

On the other hand, these targets have a larger role, which is a contribution to the agenda outlined in the MTNDP, which includes international development frameworks. However, implementation relies heavily on the context of the plan and the country. This context is also multi-layered (image, labour markets, competitiveness, and others). By mapping these interrelationships, we can trace challenges to the root causes, in order to better visualize how we can resolve them. The analysis will look both at obstacles stemming from the local context and obstacles related to the structure of the tourism sectors itself. The diagnosis will go back and forth between these two areas, all while staying rooted in the stated targets of the MTNDP. Eventually, this framework will be able to assess how the MTNDP contributes to Sierra Leone's competitiveness as a destination and where it falls short. It will ultimately highlight opportunities that can be taken advantage of fill missing gaps.

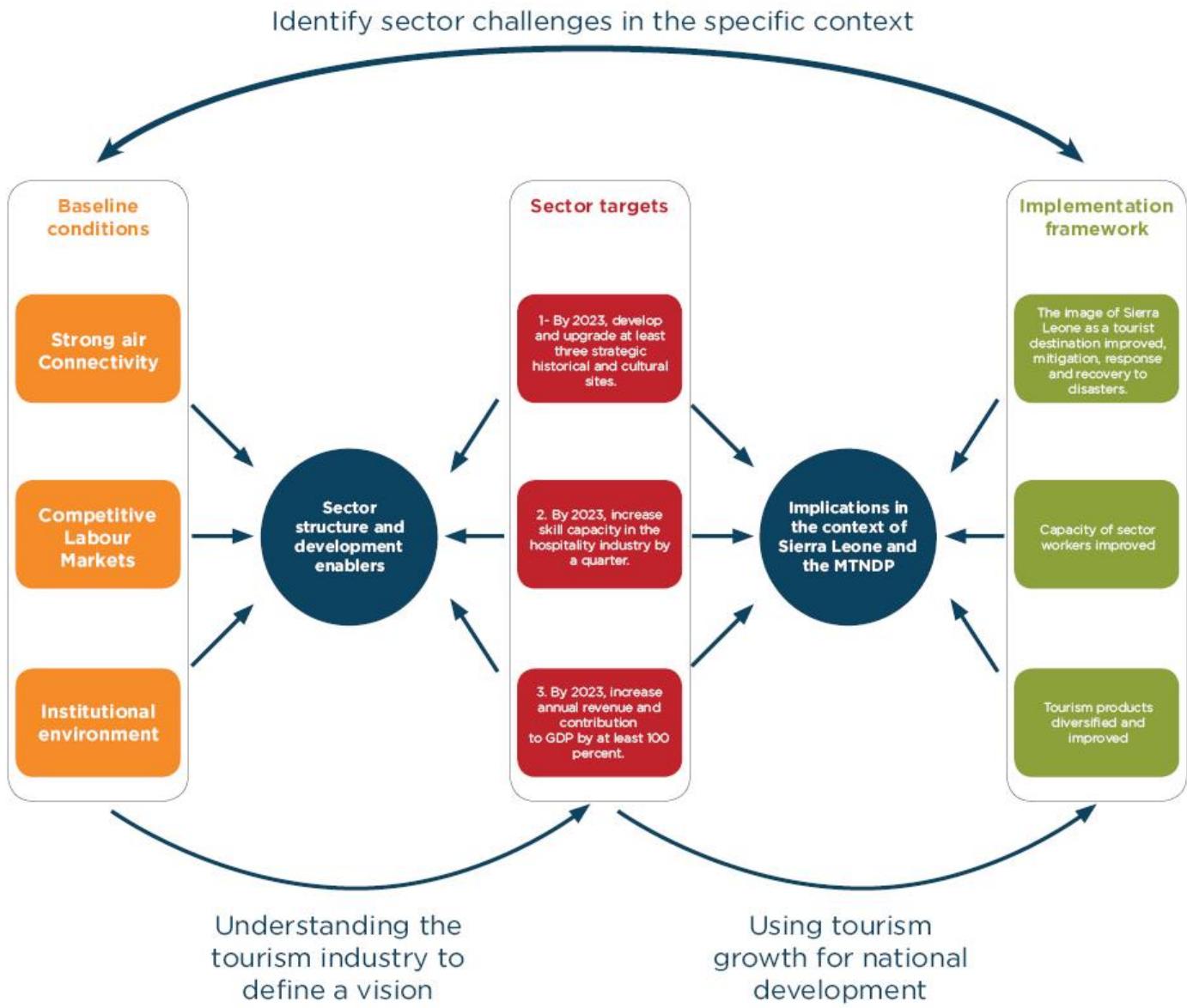


Figure 2: Framework of analysis based on the literature review and the MTNDP (Source: Author's own)

6. Methodology

6.1. Methodology and structure

This dissertation relies on both quantitative and qualitative data collected from various sources. In order to identify the challenges that may impede the plan to revitalize the tourism sector and use it to diversify and grow Sierra Leone's economy, a literature review examined several contextual and recurring topics,

such as the purpose and role of designing national development plans, the components and enablers of thriving tourism industries, and the link between tourism and healthy local economic development. It also highlighted the importance of air connectivity, efficient labour markets and functional institutions to maintain a sustainable industry. The framework of analysis regroups the central notions based on the literature review. It will provide the necessary parameters to analyse contextual information, collected through content referencing. Inductive analysis, the framework will process the collected empirical data in order to identify implementation challenges ahead of the MTNDP's tourism strategy.

Inductive reasoning

The nature of the assignment that calls for analysing an existing plan within a specific context, to identify challenges requires an inductive analysis approach. Inductive analysis, seen as the opposite of deductive analysis, calls for the collection of data in order to analyse them and provide a theory based on the analysis. Furthermore, heavy reliance on qualitative research, made an inductive approach more coherent for data processing (*Inductive or Deductive? Two Different Approaches*, no date; Gabriel, 2013).

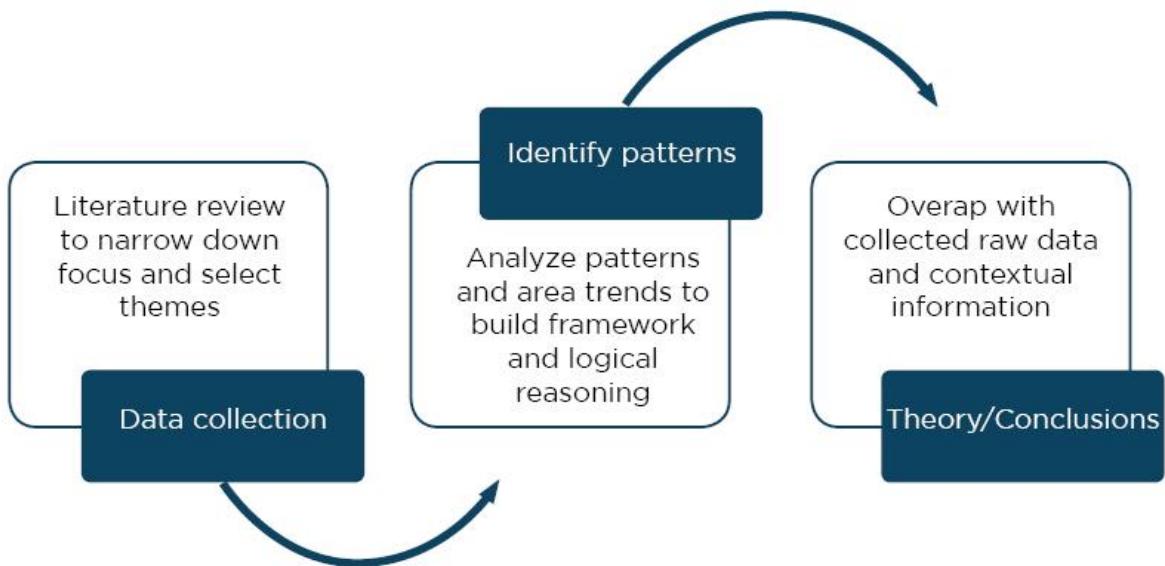


Figure 3: Inductive analysis process (Source: Author's own)

The literature review allowed the identification of recurring themes, patterns and theories that relate to the research question. In this case, tourism was considered the research core, in relation to the broader objectives of achieving sustainable and inclusive economic development through the practice of national development planning

and participatory processes. This “universe” formed the foundation of the literature review, which aimed to identify all its drivers and enablers. Amidst these enabling factors, a variety of themes emerged as essential elements for tourism development such as mobility, health, education, labour markets, and others.

Given that the MTNDP is a national strategy document that is redefined and implemented through sub-level strategies per field, the level of analysis had to remain proportional and adequate. Therefore, the study only considered macro-level factors relating essentially to central government policy.

Given the scope of the assignment, only three themes, seen as the most essential, were then selected. Air connectivity was chosen because of the relatively high gaps Sierra Leone is suffering from as well as the importance of attracting international visitors to export services and increase foreign reserves. It was also chosen since Sierra Leone is part of the Single African Air Transport Market project, which will revolutionize air transport in Africa (*SIASA (Supporting the improvement of air safety in Sub-Saharan Africa) / EASA*, no date; ICAO, no date b; InterVISTAS Consulting Ltd, 2014; UNECA, 2018). Labour Markets were also seen as an essential topic given the nature of tourism as a labour intensive and service-based industry (Elshaer and Marzouk, 2020). Finally, the institutional environment formed the connecting factors between tourism and all the other aspects of the country. It was also chosen since the strategy being analysed is a governmental plan, as well as institutions being an enabler for long-lasting positive change (Ferrini, 2012).



Figure 4: Research focus narrowing process (Source: author's own)

Archival research and secondary data collection regrouped contextual information and raw data. For both types, online libraries and depositories provided the bulk of the information. Agency reports from various

governmental and non-governmental entities, as well as studies commissioned by/for the private sector were essential for raw data collection, and allowed a relatively concrete understanding of the context. The MTNDP's two volumes were also the source of various datasets, alongside several books written on Sierra Leone. A small amount of primary research was carried out for aviation data. The approach was experimental since the result was collected using the same approach a regular tourist would use when researching flight information online.

The type of data used was both quantitative and qualitative, with the latter being more prevalent, similarly to the MTNDP. Through an inductive analysis approach, data selection and targeted research were carried out per the literature review and the framework of analysis deriving from it. The limitations mentioned in the scope section prevent the analysis from being comprehensive and deeply rooted in the current context. However, the inductive approach aims to compensate as much as possible by building on existing frameworks and research that can provide a better factorization of local context realities.

7. General Landscape

7.1. Sierra Leone's Air connectivity

Current context

In the past decade, Sierra Leone's successive governments have taken several steps that illustrate their serious intention to improve the country's aviation infrastructure and global connectivity. In 2019, the billing and settlement plan to unify invoicing and payment between travel agents and airlines was approved (Kange, 2019a). Most recently, the Parliament approved the 2020 Finance Act which eliminated the Goods and Services Taxes (GST) on all aviation-related transactions and operations (*The Finance Act, 2020*, 2019; Abdul Rashid, 2019). Legislative authorities took this decision in hopes of passing down the cost reduction to the consumer by lowering airline ticket prices to the country from foreign destinations. As part of the Africa – EU Partnership, Sierra Leone has also benefitted from two aviation safety upgrading programs. The European Union's (EU) European Air and Space Agency (EASA) has implemented the first project from 2013 – 2016 across Sub-Saharan Africa called SIASA (Supporting the Improvement of Air Safety in Sub-Saharan Africa). This program targeted specific civil aviation hazards and shared expertise with local authorities. From 2019 to 2022, a second programme called EU-ASA (EU – Africa Safety in

Aviation), with almost twice the budget, is providing extensive safety workshops and training as well as building local capacity for data collection and analysis, in order to create a safer environment for air travel (*SIASA (Supporting the improvement of air safety in Sub-Saharan Africa) / EASA*, no date; *EU-Africa Safety in Aviation (EU-ASA) Project / EASA*, no date). The SAFE fund is also benefitting Sierra Leone to improve its aviation safety record with the help of international partners (Kange, 2019b).

It is vital for Sierra Leone's economic development as a whole and specifically its tourism sector to establish robust air connectivity (Public Administration International, 2008). Statistics from the International Air and Travel Association (IATA) 2019 report clearly show strong correlations between tourist spending and passenger in passengers travelling by air, as it is the most popular means of transport for leisure trips (ICAO, 2015). The report also shows that demand for air travel is increasing, and individuals have been travelling more frequently over the past decade (IATA, 2019). This traffic growth contributes significantly to tourism employment figures, alongside the development of both cities and rural regions (Air Transport Action Group, 2005; InterVISTAS Consulting Ltd, 2014).

Nevertheless, Sierra Leone still has a considerable amount of progress to achieve before reaching an efficient air connectivity level (Montagnier, 2016). Furthermore, it is in a race against the clock, as the Single African Air Transport Market program, used to concretize the 1999 Yamoussoukro decision, has entered implementation in 2018 (UNECA, 2018). The liberalization of African airspace presents countless opportunities for economic development and improving air connectivity on both regional and global levels provided the right infrastructure exists (IATA, 2012, 2014). However, the country faces challenges on several fronts, notably safety, price accessibility and connection to the global aviation network.

Safety concerns and licensing bans

In its regularly updated EU Air Safety List, the EASA states that "All air carriers certified by the authorities with responsibility for regulatory oversight of Sierra Leone" are prohibited from flying into European airspace. The country ranks 43/46 in terms of aviation safety on the African continent. Local authorities only achieved 20% of safety standards compliance while 60% is the required minimum for restrictions to be lifted gradually on behalf of the EASA. These conditions have prevented the creation of a national flag carrier using Lungi airport as its home base, or hub, which might be costing Sierra Leone several opportunities. Studies have shown that possessing a national airline can offer a country countless

opportunities to attract regional and foreign visitors, create direct and indirect employment, promote its international image as a touristic destination, strengthen national identity, draw in foreign investment and contribute to local economic growth (Raguraman, 1997; Lijesen *et al.*, 2011; Kange, 2019b). Aviation institutions have a significant role to play in retrieving international trust in this sector by performing the necessary reforms with the help of international partners, as studies show that there is an evident correlation between aviation safety and the degree of transparency and corruption in the authorities in charge of the sector (Saounatsos, 2007).

Travel affordability

As shown in Table 4, Sierra Leone is the most expensive destination amongst its neighbouring countries. Today's leisure travellers, especially those on a budget, do tend to prioritize affordability (ICAO, no date a; Sentance *et al.*, 2017). From a wider lens, this is a factor that directly contributes to the weakness of Sierra Leone's air connectivity, as well as an obstacle to increasing tourism and destination competitiveness.

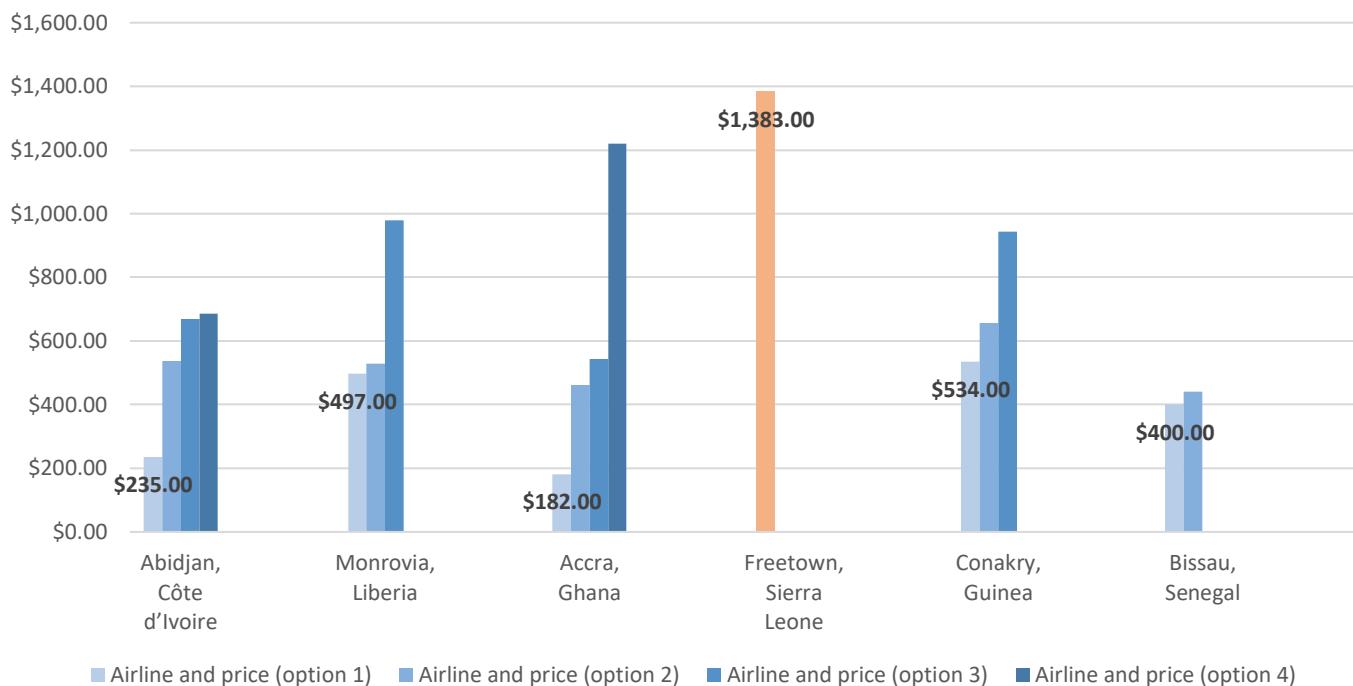


Figure 5: Chart showing the number of flight options and prices from London to West African capital cities (Data from Table 4 in the appendix, from closest to the farthest destination, visualised by author) (Prices in USD, data from July 23rd 2020 for flights scheduled for October 1st, 2020)

Disconnection from global networks and regional hubs

As shown in Table 2 (Appendix 1), Lungi Airport is only connected to 10 destinations in total, with only 3 of them outside of the African continent. The example presented in Figure 3 also shows that Lungi is the least accessible from London (The busiest city in terms of air traffic) compared to its immediate neighbours. Even though the country has several bilateral and open skies agreements with other nations (Table 4), it only profits from a very few (ICAO, no date b; *Flight Connections*, 2020). When analysing the few non-stop destinations, we see that Lungi airport is only connected to one of the thirteen African airports figuring in the “Top Passenger Airport Pairs by Route Area–International and Regional Traffic, 2018” table (Casablanca) (IATA, 2019). These thirteen cities are considered points of entry to the entire continent, and that is why efficient air connectivity needs to include these hubs.

Instability of the air connectivity

Airline routes are very competitive investments that require stability for long term revenue. Carriers are always comparing potential destinations from their hubs or focus cities in order to increase their networks (Abdelghany, 2020). However, they are limited by their fleet size and are always oriented by the demand's size fluctuations across seasons. Therefore, stability is an essential element to attract airlines and establish an increasing number of non-stop flights. Sierra Leone has experienced events over the past decades that bore a heavy impact on passenger demand for this destination. As shown in the MTNDP for example as well as in Figure 4 – Appendix 1, the Ebola crisis (2014 – 2016) dissuaded tourist and business travellers from visiting the country, significantly reducing the passenger flow through Lungi airport in parallel with seat capacity (Patel, 2015). The low number of connections from the airport accentuate this decrease, as the terminal acts mostly as a final destination port, instead of a connector within a hub and spoke system.

7.2. Sierra Leone’s tourism labour market

Current context

The labour market corresponding to tourism is as broad as the sector. Its outreach touches all the industry's dimensions. As stated previously, tourism generates both direct and indirect employment across sectors. In this section, however, we will be following mainly the OECD (Organization for Economic Cooperation and Development) practice of focusing on direct employment within catering and hospitality

businesses (OECD, 2012a). The MTNDP is looking to increase hospitality labour capacity by 25%. A 2016 report estimates that the tourism industry employs around 8,000 Sierra Leoneans, yet most of them occupy low skilled and low wage positions in dire hygienic conditions (Hotchinson Betts, 2016). Most employment in Sierra Leone is informal, which prevents labour protection mechanisms and laws of being applied (Herbert Smith Freehills LLP, 2015).

Furthermore, studies show that Freetown concentrates most of them, with rural districts suffering the most from the lack of skilled labour in the tourism industry as well as enablers for labour market efficiency (Statistics Sierra Leone, 2020). Skills are one of the main concerns in Sierra Leone's tourism labour market. This aspect is a crucial issue as studies have proven that education and training, both academic and vocational, are essential to maintain specific tourism service standards (Miroslav and Maškarin Ribarić, 2013; Saner, Bahcelerli and Eyupoglu, 2016). Studies have shown that most hotels send their employees abroad for training, as the country lacks the proper and accredited training institutions for this field (Shakya, 2009; Government of Sierra Leone, 2019). Besides, the ongoing migration of young and qualified Sierra Leoneans is exacerbating this problem (MGSOG, 2017). On the other hand, the MTNDP states its will to benefit from tourism development to revitalize rural areas, specifically cultural and historic sites outside of the capital. However, the urban-rural divide in the country poses particular challenges in terms of feasibility, as centralization remains a significant issue in Sierra Leone (Shakya, 2009; Government of Sierra Leone, 2019).

Labour market supply/demand mismatch and high turnover

Another recurring issue in the tourism job market is the mismatch between labour supply and demand(Ferrari, 2010; OECD, 2012a; World Tourism Organization and International Labour Organization, 2014). Local labour is available and accessible in terms of price and quantity, yet it lacks proficiency to adequately supply tourism services at high standards, even if this is improving with time. There are a few public and private vocational institutes and training programs, with a wide range of relevant subjects taught (Housekeeping, catering, hygiene, safety, security, interior design, and others). However, their graduate students face a significant challenge in finding jobs that require the education they invested in because it remains dissociated from the exact needs of tourism businesses (Shakya, 2009). Across the industry, tourism labour seekers, as well as corresponding tertiary education institutions, face a challenge

when it comes to providing a labour supply corresponding with the skills sought after by employers. In Sierra Leone, surveys and studies have shown that graduates of tourism vocational training share the frustration with sector recruiters due to this gap (Shakya, 2009). Young Sierra Leoneans who have invested time, effort and money into pursuing training for this industry have a hard time finding a job and end up competing with graduates who specialized in broader service majors or low-skilled employees with previous experience. The most recent tourism census indicates that 51.4% of the sector's employees across the country do not have hospitality training (Statistics Sierra Leone, 2020).

On the other hand, Sierra Leone suffers from a gap in tourism technical and managerial education, specialisations which large employers and international hotel chains particularly seek (Guerrero, 2014). This mismatch leads to spillover that go beyond the labour market, as they are also responsible for an increase in inequalities, especially in low and middle-income countries. Furthermore, it is considered as a threat to the global return on education investment and usually leads to the employment of skilled individuals in informal markets where their knowledge is not needed (Palmer, 2018).

Another source for the mismatch between labour demand and supply is the instability and demanding nature of tourism labour not only in Sierra Leone but across the world. One of the primary symptoms of this condition is the lack of retention from which small, medium and large businesses suffer. This issue has its roots in several negatives aspects associated with working in this sector (Piham, 1982). Seasonality, low wages, precarity, dependence on client satisfaction and long working hours in harsh conditions are an integral part of providing hospitality services (Piham, 1982; Stobart and Ball, 1998; Jolliffe and Farnsworth, 2003). The perception of low career progression opportunities in the sector and self-development add a negative layer on top of these conditions (OECD, 2012a). These factors lead to a high employee turnover rate, making it harder for job seekers to steadily acquire experience relating to the local industry as well as invest in time and resources to develop the needed skills for the sector as a whole (Piham, 1982; OECD, 2012a).

The Urban-Rural divide

The Western area regroups most touristic activities in Sierra Leone. Furthermore, the only four universities that offer training are located in urbanized areas, with the great majority of districts, including the Western Rural Area, lacking access to education facilities (Guerrero, 2014). The centralization of

tourism education and its disconnection from most of the country presents a grave threat of chronic inequality that leads to rural migration (Guerrero, 2014; MGSOG, 2017). A detailed look at surveys reveals that 79% of Kailahun employees, for example, do not have any training for tourism employment. In Tonkolili and Kailahun, 75% of the staff have not undergone hospitality training. In Koinadugu district, this indicator reaches 90% (Statistics Sierra Leone, 2020). This centralization of skilled labour and access to training not only prevents the rural population from developing their skills; it also precludes rural touristic destinations from upgrading their services by accessing a more skilled labour market. This condition leads to negative externalities since the entire economic development of these districts becomes jeopardized. Findings show that rural tourism is an enabler for economic diversification outside of urban areas (Cass, 2014). It can follow a faster development track since local communities create cooperatives to maintain touristic assets in their regions. They also become encouraged to share relative knowledge and skillsets, which gradually develops a competitive advantage and therefore, destination competitiveness in a global market (Cass, 2014).

Brain drain

According to the World Bank, over 52.5% of tertiary-educated Sierra Leoneans are living abroad. This number includes 42.4% and 48.9% of all physicians and nurses born in Sierra Leone (The World Bank, 2015). The same sources acknowledge that Sierra Leone suffers from a growing “Brain drain” problems, that threatens the country’s sustainable and long term educational and social development. Furthermore, the growth of migrant communities abroad contributes to the rise in group immigration, which, in the case of Sierra Leone, creates a snowball effect (Sassen, 1988). Table 6 in appendix reveals Sierra Leone has been suffering from a negative net migration almost a decade now, similar to its direct neighbours. The short-term positive effect of the growing Sierra Leonean diaspora is the increase in personal remittances received. For example, in 2018, data shows that the total amount of remittances received reached 62 million US Dollars, which accounted for almost 5% of the GDP (The World Bank, 2020). However, studies have shown that remittances contribute to the creation of a rentier state on the long run, which threatens a country’s economic and political dependence, especially in the post-conflict contexts (Piccolino, 2015; Lemay-Hébert and Murshed, 2016; Malik, 2017). One study does qualify Sierra Leone’s economy as being “exploitative”, or following a rent-seeking model, with its high dependence on natural resources, foreign aid and expatriate money (Centre of Sierra Leone Studies, 2017). Therefore,

the immigration of skilled and talented labour threatens not only the tourism sector but the foundation of the country's economy as a whole.

7.3. Sierra Leone's tourism institutions

Current context

The ministry of tourism and cultural affairs is the primary administrator for tourism planning and organization in Sierra Leone. The ministry is responsible for project coordination, policy design, legal and legislative frameworks for tourism development. One of its leading depending agencies is the national tourism board, which serves at an executive arm for policy and project implementation, data collection, image marketing and international relations. It was established in 1990 and began its operations in 1991 (*Sierra Leone National Tourist Board*, no date; *National Tourist Board - Visit Sierra Leone (VSL TRAVEL)*, no date; *MDAs – Ministry of Tourism and Cultural Affairs*, no date). The institutional environment, however, suffers from a wide range of lacks and obstacles inhibiting the healthy development of sustainable tourism. It translates most explicitly in its relatively low destination attractiveness, which in its turn discourages foreign visitors from visiting Sierra Leone (Shakya, 2009). Failures to provide a tourism-friendly environment manifests itself through the failure of several societal and economic regulatory factors, such as high costs, lack of safety, corruption, foreign investment attraction, business friendliness and others (Kongoley-mih, 2017).

Corruption

Systemic corruption is an endemic problem in Sierra Leone. It was one of the elements that led to the first government overthrow in 1991, in an attempt for militias to seize power over the corrupt mining industry (Chêne, 2010). Even anti-corruption institutions are perceived as complicit, lenient and biased when it comes to prosecuting government officials and their entourage (Centre of Sierra Leone Studies, 2017). Institutional appointments and hiring are influenced by the local political parties, who use the state's apparatuses to their benefits. The entrenched lack of transparency and faith affects all sectors, at different levels. However, according to a 2019 Survey conducted in Sierra Leone, corruption in the tourism sector is perceived to exist at a great extent, which impedes the healthy development of the industry and local benefactors (*Corruption Perceptions Survey 2019*, 2019).

A weak image due to safety concerns and access to amenities

One of the central tourism economic institutions is image and perception, which are vital components of destination attractiveness. A destination might have different elements that provide attractions, such as business or a wide range of tourism activities. However, safety remains a multilateral dimension that affects all visitors considering a trip to a particular region, regardless of the purpose (Kővári and Zimányi, 2010; Lejune, 2017). Travel advisory reports issued by developed countries (United States, France, United Kingdom, Australia, or other) can inhibit a destination's unobstructed tourism growth, leading to negative spillover across other sectors (Mylonopoulos, Moira and Kikilia, 2016). In 2020, the United States' State Department moved Sierra Leone from a level 2 to a level 3 rank on their travel advisory report (US Department of State, 2020). This shift was due in part to the global pandemic. However, the country had been dealing with increasing crime and other threats for a while, and extreme caution was recommended for visitors considering Sierra Leone as their destination (OSAC, 2020). The United Kingdom's Foreign Office provides similar advice, discouraging British nationals from visiting the country due to unmanaged natural and human-made hazards, notably poor road conditions, weak policing and lack of proper amenities (Foreign Commonwealth & Development Office, 2020). Some research suggests that travel advisories amplify threats. However their impact is tangible, and therefore must be considered when identifying obstacles ahead of the development of tourism in certain regions (Mylonopoulos, Moira and Kikilia, 2016; Mylonopoulos, Moira and Papagrigoriou, 2016). Previous disasters and conflicts have scarred Sierra Leone, and media coverage during the previous crisis still lingers to this day (Kongoley-mih, 2017). Many foreigners associate the country with the Ebola pandemic or the civil war, even though these events have not resurfaced in years.

The negative perception is not only limited to the country's history or security contexts, but also with its level of amenities and services provided. Travel advisory reports mention low-quality healthcare, to warn tourists that they may not receive adequate treatment in the event of an unexpected injury (US Department of State, 2020). These reports also mention petty crime, theft and insecurity even in hotels, as travellers are requested to exercise caution even in their residences. Weak law enforcement is also considered an enabler for crimes against visitors, especially with the administrative paperwork and fees required to settle when a foreigner needs to file a crime report (Foreign Commonwealth & Development Office, 2020). Power cuts, lack of clean water, high costs and low transport accessibility are all factors that

contribute to the hostile image foreigners may acquire of the country, which would eventually deter them from visiting it (Kongoley-mih, 2017).

Ease of doing business

Business establishment and expansion remains challenging on several levels. The World Bank ranked Sierra Leone at 151 out of 189 economies in 2015, and 161 out of 191 economies in 2019, for “getting credit”, while the regional average for the rest of sub-Saharan Africa was 122 (*FINANCE AND BANKING; Investing in Sierra Leone*, no date; Herbert Smith Freehills LLP, 2015). The law prohibits Lending in foreign currency in the country, which is a barrier preventing the expansion of businesses that may rely on certain imports. As mentioned earlier, tourism not only relies on local assets but relies heavily on imported techniques, specialized labour, quality products for international standards, international operators as well as air transport connectivity. In order to trade with these goods and services, merchants use foreign currency, which can only be acquired through foreign exchange offices relying on a floating conversion rate. Conducting business is even more restrained with the current state of the infrastructure. For example, only 10% to 12% of the urban population and only around 2% of the rural population have access to electricity (energypedia.info, 2020). The inability to compete with and adjust to global requirements for trade and services reduces the chance of foreign investment and capital flow significantly into the country.

Finally, tourism development in Sierra Leone suffers from a lack of coordination between the various actors involved. The cross-cutting nature of the sector is posing a grave threat to the government in terms of management and governance (Shakya, 2009; Kongoley-mih, 2017). Unclear jurisdictions between public agencies prevent the careful monitoring of some areas within the field (National Tourist Board, Ministry of Tourism, other public entities, and others). The impact this situation can range from lack of supervision to increased bureaucracy when several actors are involved inefficiently (Shakya, 2009).

8. Discussion

8.1. Analysis of the findings

There is no doubt the MTNDP is a milestone on the country’s path towards development. The process of identifying challenges through this study is a first step towards filling some gaps in the plan that may

threaten certain aspects of its. It is also a means to increase resilience and encourage substitutes if needed. Several overlapping issues were identified in the three areas, mostly relating to governance and accountability. For example, safety was a recurring theme, especially in the first and third challenges. Absence of coordination between stakeholders, as well as mismatches and market inefficiencies, were detected in all areas, with a negative impact on users, private operators and governmental agencies. Furthermore, problems such as brain drain, corruption and lack of international trust generate a spillover into all corresponding fields and industries.

The first challenge identified was air connectivity. As mentioned in the literature review and the framework, mobility, and accessibility are both components of tourism infrastructure. International air mobility is a crucial enabler for destination attractiveness in today's world. Studies have demonstrated that tourists consider flight conditions when organizing their next trips (Raguraman, 1997; ICAO, 2015; Zajac, 2016). High airfares are proving to be a key obstacle ahead of attractiveness, primarily since traditional carriers mostly serve the current routes. This hurdle, however, might be an opportunity to restructure Sierra Leone's air connectivity by relying more on low-cost carriers (LCC). LCCs not only attract customers looking for cheaper tickets, but also activate an nonexistent category of travellers, who would not be considering travel arrangements if it was not for the extremely low ticket prices (Olipra, 2012). The introduction of LCCs in various destinations has been a source of rapid economic growth due to the significant increase in tourist arrival (Koens, Postma and Papp, 2018).

Attracting LCCs can also improve global connectivity. This type of airlines has a more prominent tendency to operate via a point to point system, as opposed to a hub and spoke system which increases centralization and therefore layovers. Airlines using a point to point model cover more expansive geographic areas, and are also more resilient in the face of unexpected interruptions erupting in a single geographic area (Olipra, 2012; Kallab, 2020).

Industrial safety and quality standards remain a primordial issue preventing long term and sustainable tourism growth. This factor is linked to the local labour market across several tourism-related fields, from hotel services to the air industry. As argued above, the lack of opportunities and challenging living conditions is driving away Sierra Leone's brightest young men and women. If managed carefully, however, there is room to benefit from a growing diaspora. Remittances, for example, contribute to the national

economy and empowers households who have members abroad (UNICEF, 2013; The World Bank, 2015; Ahmed and Africa, 2020). Sierra Leone's diaspora is also capable of supporting local business through investments and skills development. However, diaspora engagement increases the chances of developing a rentier economy as well as dependency on foreign funds (Piccolino, 2015; Lemay-Hébert and Mursched, 2016; Malik, 2017).

The diaspora can also play an essential role in mitigating the skills mismatch problem. With access to international resources in terms of education, apprenticeship and expertise, Sierra Leonean expats quickly develop more skills than their fellow citizens who are limited local knowledge (The World Bank, 2015). An opportunity could present itself if Sierra Leone's government, in partnership with all the stakeholders, work on increasing the appeal of the tourism sector. Since Sierra Leone needs to import these skills, they need to create the right conditions that could convince expats to return to their home country. Once back, expats should share their expertise with local educational facilities in order to stay up to date with international operating standards. A key enabler for this approach remains, however, a thorough identification of skills shortage in the market, as well as the improvement of tourism labour conditions (OECD, 2012b, 2012a; Dupeyras and Neil, 2013). Studies need to measure skills, wages, supply and access to job opportunities. Human resources plans need to be developed on a national level through a participatory process that includes all stakeholders, such as the government, unemployed youth, the education sector and the private recruiters (Zagonari, 2009).

Finally, key issues within the institutional environment for tourism in Sierra Leone are actively preventing the sustainable development of the industry. First and foremost, Sierra Leone suffers from a somewhat negative reputation linked to the lack of amenities and safety. Potential visitors who might not be familiar with the context associate the destination with the country's past, especially the civil war and the Ebola pandemic. Public safety and hygiene shortcomings also damage Sierra Leone's reputation. Corruption remains a major problem ahead of reinforcing good governance and empowering institutions. On the economic side, the country remains on the one hand, highly dependent on foreign aid, yet has not managed to create a stable business-friendly environment to attract foreign investment (Smith, 2019). Finally, a lack of agency coordination and efficient stakeholder engagement is reducing implementation efficiency (Shakya, 2009; Kongoley-mih, 2017). Tourism, however, has the potential to provide a solution

for these problems. Its international reach makes it an ideal platform to attract foreign investors through partnerships with international agencies. Involving the local civil society, the private sector and government agencies might be an efficient means to implement transparency frameworks and ensure economic growth can benefit both local populations and international stakeholders. Anti-corruption measures, implemented with the help of diplomatic missions, UN agencies and private stakeholders can increase confidence as well as the country's reputation and therefore destination attractiveness (Herbert Smith Freehills LLP, 2015; IDL Group, 2015; Ekine, 2018).

8.2. Current Covid-19 situation and implication on plan

The year 2020 will be remembered for the Covid-19 pandemic. The virus outbreak had an impact on all sectors, with the large majority of the suffering negatively from it. Sierra Leone is no stranger to outbreaks, with the country being one of the most hit with the Ebola crisis. Tourism, in particular, was one of the industries hit the most with May 2020, witnessing a 98% decrease in touristic activity compared to the previous year (UNWTO, 2020). Naturally, the aviation industry took a significant hit following lockdown measures, general recommendations to avoid confined spaces, and unpredictability of short term travel status. The economic crisis led to massive layoffs,

In Sierra Leone, the government declared a 12-month state of emergency before official identified the first domestic case. In the following month, lockdown measures, including temporary flight bans, were implemented.

In order to understand a disaster, one must not look at the hazard itself (the pandemic), but rather focus on existing vulnerabilities, particularly in terms of disaster risk reduction and response planning (Oliver-Smith, 2005). There is no doubt that a crisis of this size and nature would have been difficult to foresee, yet the reality remains: disasters amplify pre-existing inequalities and vulnerabilities, especially on the socioeconomic level. In regards to the MTNDP, we can assume that the existing challenges will become more challenging to overcome.

Reforms and projects relating to aviation will be complicated to develop as an investment in this area is now considered high risk. As established earlier, this field is highly dependent on the tourism industry as well as the global aviation network, both operating at their lowest capacity because of the pandemic. A

return to normal will not only require trust and lifting border lockdowns, but mostly a global economic improvement that enables a higher purchasing power for potential tourists, and therefore a trickle-down of the improvement to the household scale.

Like all labour markets, tourism employment in Sierra Leone saw a decrease in activity, with the reduction of both international and local demand for tourism products and services. Furthermore, as digital penetration remains relatively low and concentrated in Freetown, it would be hard to expect for tourism education to have any real impact on the national level, even if it does switch to distance learning.

On an institutional level, the disaster led to a shift in priorities. Relief, recovery and adaptation diverted effort and resources from ongoing projects to managing the sanitary crisis and its repercussions. The influx of foreign aid for humanitarian relief did empower the government's response. However, it also increases its dependence on foreign aid, which increases the country's financial vulnerability in the long run.

It is still too early to measure the impact of Covid-19 on the MTNDP accurately. Global trends indicate the pandemic is causing significant social, economic, financial and political disarray. However, in some cases, the pandemic also presented opportunities: the decrease in activity reduced carbon footprints, congestion, and most importantly, led to the emergence of rapid, innovative and contemporary solutions in order to adapt and survive. If managed creatively, the Covid-19 can presents prospects for Sierra Leone by profiting from this new reality to address some of its persisting challenges in the areas of centralization, agricultural development, environmental sustainability and trade balances.

9. Conclusion

The purpose of this dissertation is the identification and analysis of three main challenges ahead of the tourism roadmap within Sierra Leone's MTNDP ('Trade set to plunge as COVID-19 pandemic upends global economy', 2020; Ozili and Arun, 2020). On a global level, the MTNDP presents an ambitious road map towards better living conditions, sustainable growth and decentralized inclusive empowerment. It is a considerable milestone in the country's post-war era, as it falls in line with the same principles put ahead during the reconciliation process, such as decentralization, social justice, participatory governance, national dialogue and others (Baker and May, 2004; Leone and Commission, 2014; Government of Sierra Leone, 2019; The World Bank, 2019; Lynch, Nel and Binns, 2020). The tourism development section

includes both tangible objectives (touristic site rehabilitation) and abstract goals (skills development and increased competition).

The research identified three main challenge areas directly linked to tourism: air connectivity, labour markets and institutions. The weak connection of SL to the international air travel network created a handicap in terms of accessibility. Flights to Lungi airport were much more rare and expensive compared to neighbouring countries (Abdul Rashid, 2019; KAYAK, 2020). Furthermore, safety concerns and the lack of a national airline increase the burden.

When it comes to the industry's labour market, evident gaps in education and skills were identified, partly due to a weak match between the sector's needs and the market's offer. Low wages and the industry's challenging work environment exacerbated the mismatch, in a country already suffering from brain drain due to the mass migration of youth and skilled citizens.

Finally, the institutional environment clearly showed endemic and structural issues that significantly damaged the country's attractiveness for potential visitors (Shakya, 2009; The World Bank, 2015; Kongoley-mih, 2017). Sierra Leone's image as a safe touristic destination is tainted (in some cases unfairly) due to the country's recent history and infrastructural problems. Centralization, obstacles ahead of entrepreneurship and poor stakeholder coordination create significant developmental challenges for the industry, by deterring foreign investment and reducing the sector's size.

These challenges are highlighted and dissected because of the structural obstacle they represent, ahead of an industry that proved to be filled with opportunities and potential. The 300% immediate increase in visitors one year after the end of the Ebola crisis is a proof that Sierra Leone has the necessary elements to compete on an international level with similar destinations, and is a sought-after market (Government of Sierra Leone, 2019; Statistics Sierra Leone, 2020). The country's tourism sector can become much more competitive and resilient to unexpected shocks if the concerned stakeholders work on mitigating these challenges.

Finally, the covid-19 pandemic will have a hard impact on the country's already unstable tourism industry. The exact size and scope of this impact will not be precise until some time. The projections for the resort, airline, event and international tourism markets are quite bleak (Ozili and Arun, 2020; UNWTO, 2020).

However, Sierra Leone has some advantages in regards to this matter, such as its experience with post-disaster, specifically post-pandemic recovery(*Sierra Leone National Tourist Board*, no date; Pinto, 2018; Den Boogaard, 2020). It can also seize the opportunity to build back better while implementing measures that make the industry more sustainable in the long term.

10. Bibliography

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Appendix I: Sierra Leone's air connectivity data

Table 2: Extracted data from www.flightconnections.com showing the number of direct flights from countries in West Africa (Only from major airports) to African and non-African destinations (Source: (Flight Connections, 2020), data compiled by author)

Rank	Country	Number of direct flights from the main airport to African destinations	Number of direct flights from the main airport to non-African destinations	Total of direct flight destinations from the main airport
1	Senegal	18	13	31
2	Ghana	17	10	27
3	Côte d'Ivoire	13	7	20
4	Burkina Faso	13	3	16
5	Mali	12	2	14
6	The Gambia	6	8	14
7	Mauritania	9	2	11
8/9	Sierra Leone	7	3	10
8/9	Guinea	6	4	10
10	Liberia	6	2	9
11	Guinea-Bissau	3	1	4

Table 3: Comparison of international tourist arrival and revenue (in USD million) with neighbouring countries (2015 figures - Source: (Sierra Leone's Medium-Term National Development Plan 2019-2023 Volume II, 2019))

	International tourist arrivals	International tourist receipts (US\$ million)
Sierra Leone	24,000	23
Gambia	135,000	120
Senegal	1,007,000	368
Ghana	897,000	819

Table 4: Bilateral agreements and Traffic for Sierra Leone (ICAO, no date b)

Bilateral Agreement and Traffic for SIERRA LEONE				
State		Agreement Type	Flights	Seats
BEL	Belgium	Traditional/Transitional	24	6,816
CIV	Cote D'Ivoire	Non-recorded Agreement	113	13,217
FRA	France	Traditional/Transitional	0	0
GMB	Gambia	Non-recorded Agreement	2	354
DEU	Germany	Traditional/Transitional	0	0
GHA	Ghana	Non-recorded Agreement	123	17,850
GIN	Guinea	Non-recorded Agreement	79	16,834
LBN	Lebanon	Traditional/Transitional	0	0
LBR	Liberia	Non-recorded Agreement	265	43,288
MAR	Morocco	Non-recorded Agreement	261	36,909
NLD	Netherlands	Traditional/Transitional	0	0
NGA	Nigeria	Traditional/Transitional	0	0
SEN	Senegal	Non-recorded Agreement	51	13,922
ESP	Spain	Traditional/Transitional	0	0
GBR	United Kingdom	Traditional/Transitional	4	630

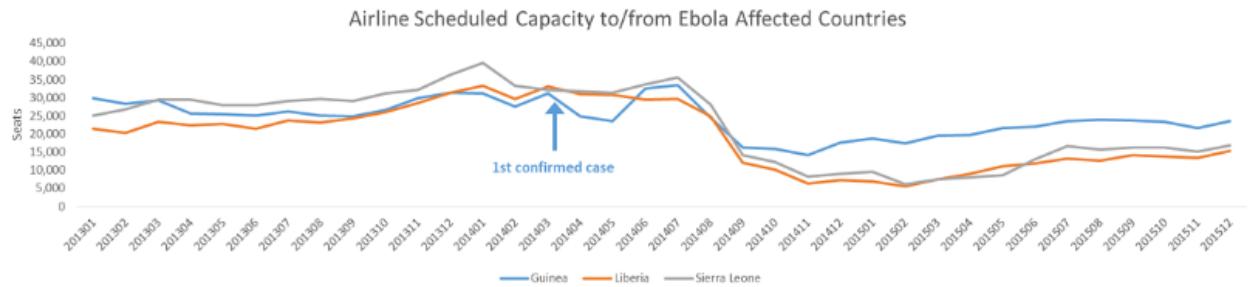


Figure 6: Airline scheduled capacity to/from Ebola-affected countries (Patel, 2015)

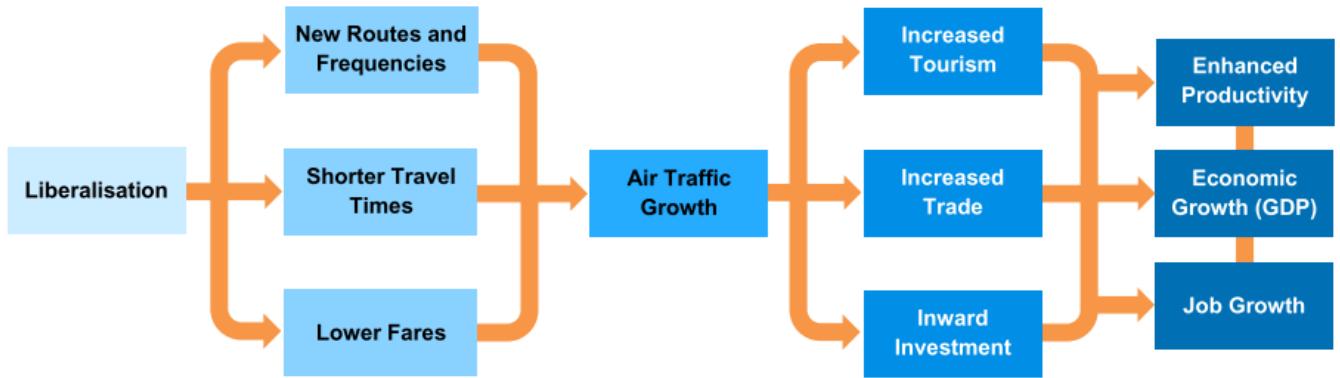


Figure 7: Framework to achieve socio-economic growth through liberalization of air traffic in Africa (InterVISTAS Consulting Ltd, 2014)

Appendix II: Extract of the MTNDP Volume 2 sub-cluster 2.2.3 showing implementation framework and programs to revitalize the tourism sector

2.2.3 Sub-Cluster 2.3: Revitalizing the tourism sector

Strategic Objective:

- To increase state revenue, provide jobs, and promote the cultural heritage of the country through improving the policy and legal environment and developing the relevant infrastructure through a holistic approach to diversified tourism in Sierra Leone.

National Indicators:

- Revenue contribution to the economy
- Contribution to GDP
- Number of new jobs created

Corresponding SDGs indicators:

- 17.1.1 Total government revenue as a proportion of GDP, by source
- 8.9.1 Tourism direct GDP as a proportion of total GDP and in growth rate
- 8.9.2 Proportion of jobs in sustainable tourism out of total tourism jobs

DEVELOPMENT OUTCOME(S)	NATIONAL TARGETS	CORRESPONDING AGENDA SDGs TARGET	STRATEGIES/POLICIES TO ACHIEVE DEVELOPMENT OUTCOMES	PROGRAMMES TO IMPLEMENT STRATEGIES/POLICIES	INTER-SECTORAL AND MDA LINKAGES
OUTCOME 1: The image of Sierra Leone as a tourist destination improved, mitigation, response and recovery to disasters.	By 2023, increase tourist arrivals by 3 folds	12.b Develop and implement tools to monitor sustainable development impacts for sustainable tourism that creates jobs and promotes local culture and products	Improve the international image of Sierra Leone and diversify marketing of the country Improve the policy and legal framework that creates jobs and promotes local culture and products	Undertake corporate advertising in airlines arriving, and advertise on the international media Review policy regulating and promoting tourism Promote competition in the sector to reduce costs and improve value for money.	NTA, SL Embassies/ High Commissions, Airlines, International Media
OUTCOME 2: Capacity of sector workers improved	By 2023, at least 50% of workers in the tourism industry are qualified staff. By 2023, increase skill capacity in the hospitality industry by a quarter.	12.b Develop and implement tools to monitor sustainable development impacts for sustainable tourism that creates jobs and promotes local culture and products	Create a human resources development plan, upgrade the existing school for hotel management, and collaborate with international hospitality institutions.	Facilitate and regulate the hotel and tourism training institutions Review curriculum to international standards Train to have SL brand	NTB, MBSSE, private sector
OUTCOME 3: Tourism products diversified and improved	By 2023 at least 50% of tourism facilities and sites are developed to	12.b Develop and implement tools to monitor sustainable	Rehabilitate and develop historical and cultural sites through a holistic rehabilitation	Rehabilitate at least 3 sites	NTB, Monument Board

DEVELOPMENT OUTCOME(S)	NATIONAL TARGETS	CORRESPONDING AGENDA SDGs TARGET	STRATEGIES/POLICIES TO ACHIEVE DEVELOPMENT OUTCOMES	PROGRAMMES TO IMPLEMENT STRATEGIES/POLICIES	SECTORAL AND MDA LINKAGES
internationally acceptable standards.	development impacts for sustainable tourism that creates jobs and promotes local culture and products By 2023, develop and upgrade at least three strategic historical and cultural sites.	plan. Promote eco-tourism to ensure the protection of the country's rich biodiversity.	Protect biodiversity Advertise the biodiversity richness of SL	NTB, MOFF, Academia, media, NGOs	

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11. Appendix III: Economic Diversification and competitiveness

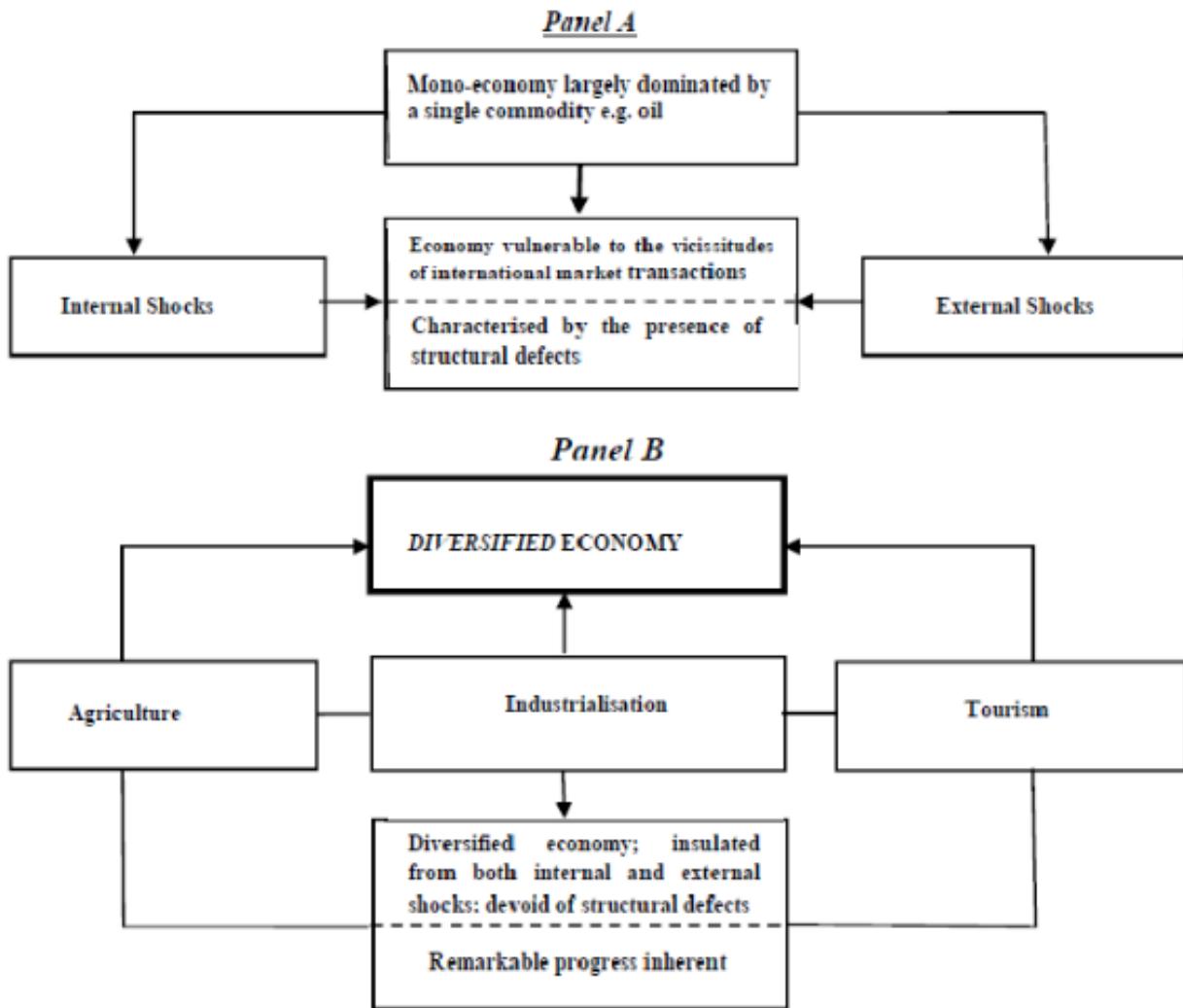


Figure 8: Schema displaying the effect of tradition versus diversified economic models (O. J., 2015)

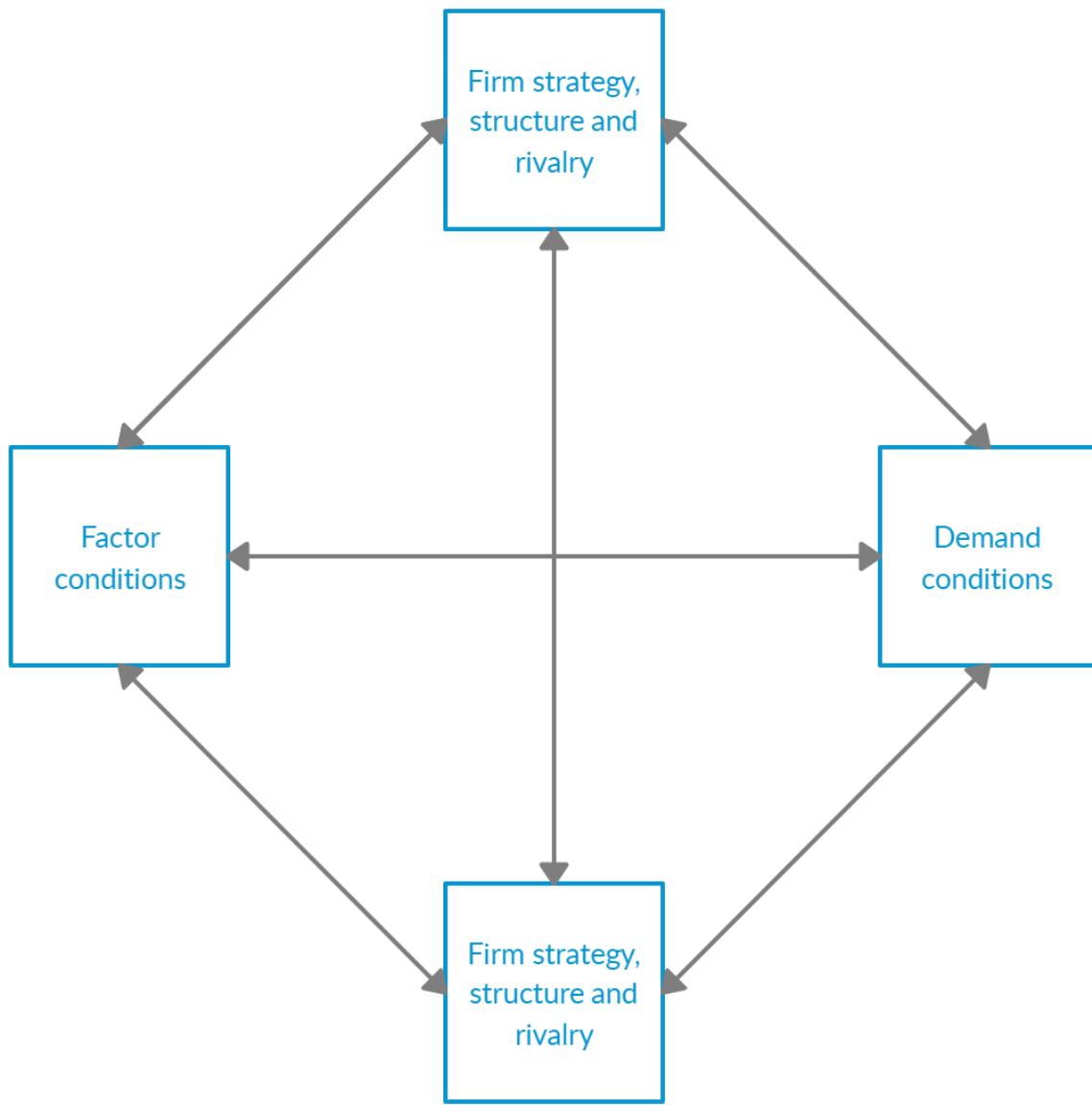


Figure 9: Porter's national competitiveness diamond - illustrated by the author (Porter, 1990)

Porter's Diamond:

The central concept behind this model is that competitiveness can only prosper in an environment or ecosystem that provides a wide range of factors, from infrastructure to the right business conditions. Furthermore, these components need to be highly specialized and relative to the field of the desired competitive advantage in order to become an export leader. Additionally, the efficiency of the downstream industries is a determining factor alongside their proximity in order to increase cost-

efficiency, supply speed and sometimes preferential service. Finally, domestic competition needs to exist organically as it becomes a driver for innovation, rivalry and efficiency. Its benefits cycle back to relevant infrastructure development, demand increase and supply chain efficiency (Porter, 1990). As to the role of the public sector, Porter specifies that the government must act as a catalyst that incentivizes the competitive environment through partnerships, public service provision, education, trade facilitation, antitrust and consumer protection policies, or other examples of environment preservation.

12. Appendix IV: Conceptual models for determinants of successful tourism

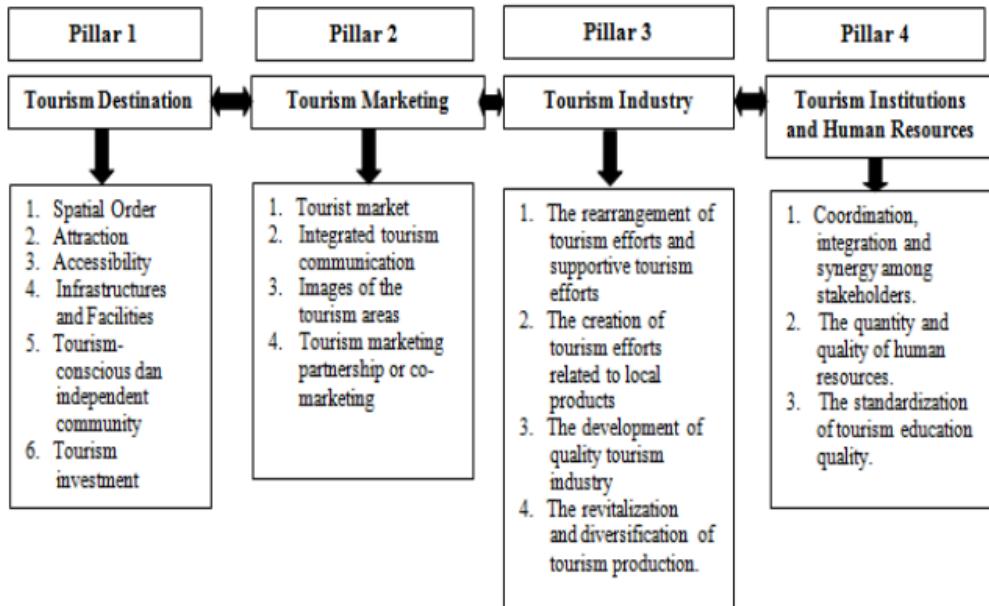


Figure 10: The four pillars of tourism development (Wijayanti and Dewi, 2016)

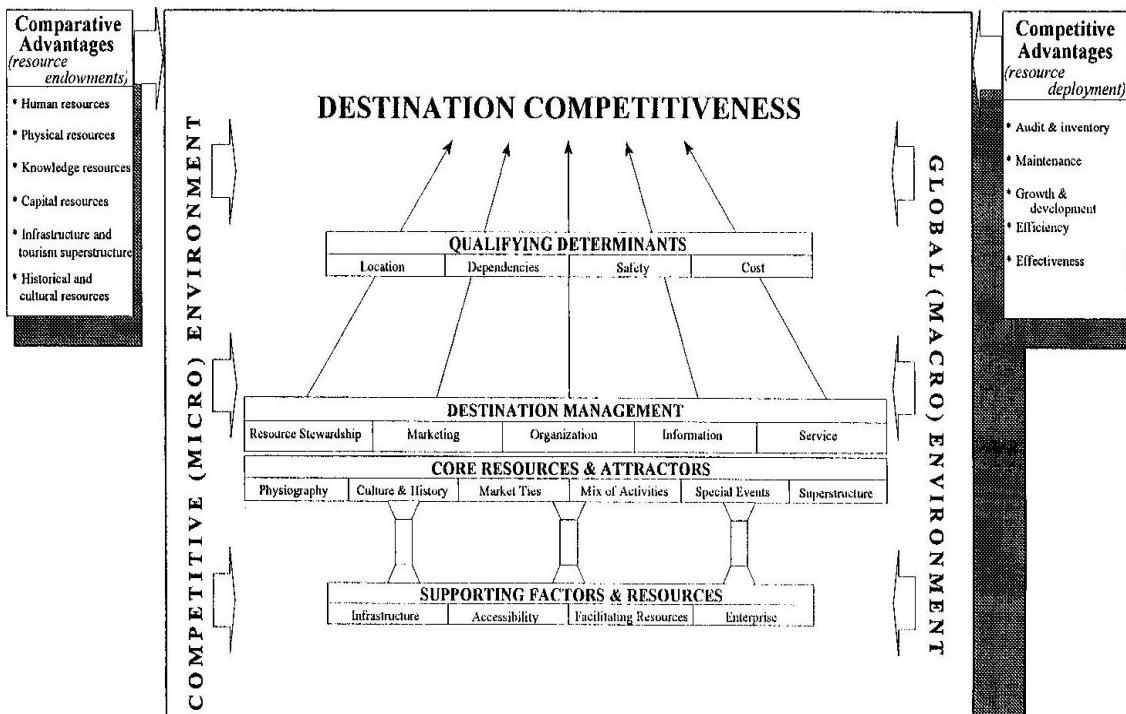


Figure 11: Conceptual model of destination competitiveness (Crouch, 2004)

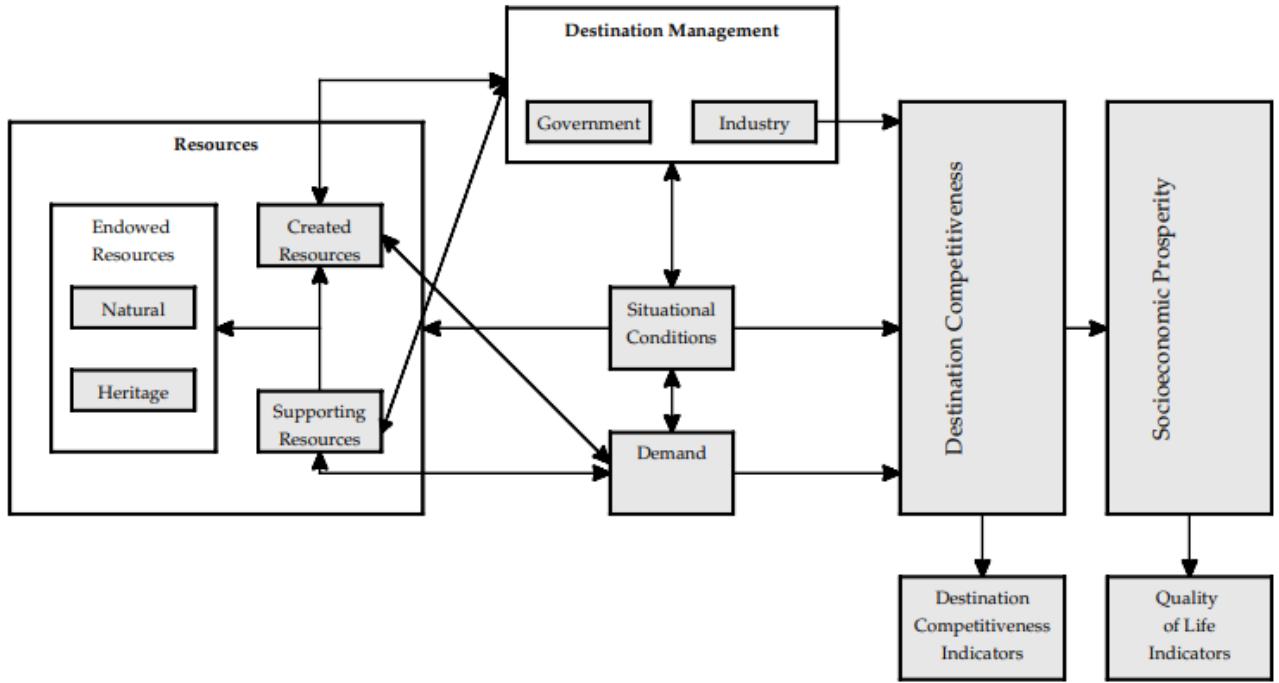


Figure 12: The main elements of destination competitiveness (Dwyer and Kim, 2003)

Crouch's model:

The model provides a bottom-up understanding of the concept, starting with Supporting factors and resources (e.g., infrastructure and accessibility), then Core resources and attractors (E.g., Special events), then Destination management (e.g., marketing) and finally Qualifying determinants (E.g., Cost and safety).

Appendix V: Air travel measures

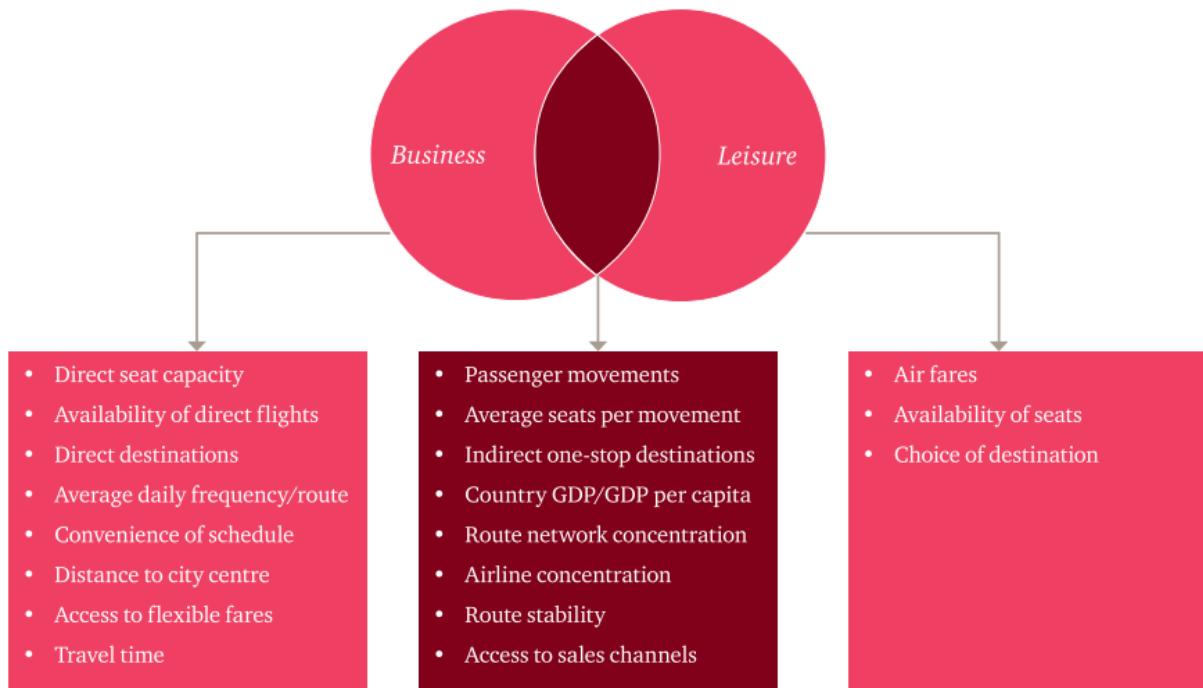


Figure 13: Air travel measures (Sentance et al., 2017)

13. Flight prices comparison between Sub-Saharan Africa countries

Flight from London (All airports) on October 1st 2020, the city with the busiest airport system in the world
(Busiest Airports by Passenger Traffic, 2019)

Table 5: Comparative table of flights from London, the UK to West African capital cities for October 1st, 2020 (data compiled from Kayak.com by the Author on July 23rd, 2020)

Capital city	Distance (Km) from London	Quickest flight trajectory	Airline and price (option 1)	Airline and price (option 2)	Airline and price (option 3)	Airline and price (option 4)
Abidjan, Côte d'Ivoire	5144.34	1 stop	TAP Air Portugal 235.00 USD	Royal Air Maroc 538.00 USD	Ethiopian Air 670.00 USD	Lufthansa + Brussels Airline 685.00 USD
Monrovia, Liberia	5120.43	2 stops	TAP Air Portugal + Kenya Airways 497.00 USD	TAP Air Portugal + AWA 528.00 USD	Turkish Airlines 980.00 USD	X
Accra, Ghana	5107.81	Non-Stop	British Airways 1221.00 USD	TAP Air Portugal (1 stop) 182.00 USD	Egypt Air 461.00 USD	Brussels Airlines (1 stop) 544.00 USD
Freetown, Sierra Leone	4930.92	1 stop	Air France 1383.00 USD	X	X	X

Conakry, Guinea	4830.54	1 stop	Royal Air Maroc 534.00 USD	Emirates 656.00 USD	Tunisair 943.00 USD	X
Bissau, Senegal	4374.02	1 stop	Easy Jet + TAP Air Portugal 400.00 USD	TAP Air Portugal 441.00 USD	X	X

Note: Distances taken from (*Distance Calculator Find Distance Between Cities*, 2020)

14. Net Migration Data – Sub Saharan Africa Low Income Countries

Table 6: Net migration data for Sub Saharan Low-Income Countries (The World Bank, 2020)

Country Name	1997	2002	2007	2012	2017
South Sudan	300000	432000	846611	-100000	-870998
Zimbabwe	-524671	-697817	-512676	-622997	-584288
Nigeria	-95027	-170000	-300000	-300000	-300000
Sudan	-602679	-546005	-982687	-538145	-250001
Tanzania	-400706	-300523	-500853	-250435	-200381
Somalia	0	0	-199997	-233405	-200002
Central African Republic	30000	-24405	-125614	-396129	-200000
Mali	-141950	-67110	-100823	-302449	-200000
Eritrea	-129998	227290	-80009	-246000	-199290
Burkina Faso	-137499	-125000	-125000	-125000	-125000
Senegal	-227553	-202487	-218014	-214002	-100001
Malawi	-59163	-59163	-59163	-80263	-80263
Lesotho	-37212	-161218	-92476	-47704	-50234
Ghana	-126999	25002	150000	-50000	-50000
Kenya	-21386	25144	-189330	-50000	-50000
Rwanda	1244966	-72601	-79767	-108094	-44998
Eswatini	-25847	-47814	-38219	-41764	-41764
Cote d'Ivoire	180000	-300000	-200000	-80000	-40000
Zambia	20000	-150000	-175000	-50000	-40000
Liberia	462952	-50000	175585	25000	-25000
Mozambique	-50000	30004	-40000	-25000	-25000
Namibia	-21174	-941	8713	-37034	-24030
Cameroon	-48000	-54000	-54000	-36000	-24000
Sierra Leone	-150000	500000	60000	-21000	-21000
Congo, Rep.	49302	51485	91771	-60000	-20000
Guinea	-181099	-349998	-311422	-293749	-20000
Gambia, The	-4570	1517	-15436	-15436	-15436
Benin	-2851	25005	-48776	-42268	-10000
Comoros	-6000	-10000	-10000	-10000	-10000
Togo	80000	-33000	-10598	-9994	-9999
Sao Tome and Principe	-9551	-8400	-3391	-8400	-8401
Madagascar	-8500	-7500	-7500	-7500	-7500
Guinea-Bissau	-41167	-27932	-17502	-7005	-6996

Cabo Verde	-5438	-9859	-11341	-8029	-6709
Seychelles	-255	2634	-2725	-1000	-1000
Mauritius	-8858	-19372	-12079	-12079	0
Chad	69444	218966	75000	100000	10000
Burundi	-455304	-24721	30004	-70001	10003
Botswana	36443	26928	26928	-73138	14999
Gabon	9566	24820	63698	100317	16301
Niger	-9944	-9497	-20001	18911	20001
Mauritania	-44003	-10004	10001	25002	25002
Angola	199800	261100	357301	166267	32066
Equatorial Guinea	35001	50003	80001	89999	79998
Congo, Dem. Rep.	-958174	-241564	-43426	15060	119303
Ethiopia	-155577	-150001	-50132	399997	150002
South Africa	639902	788982	862221	919697	727026
Uganda	-180002	-250002	-500000	-299994	843469

Table 7: Percentage Number of people employed in facilities by District (Statistics Sierra Leone, 2020)

District	<u>< 10</u>	<u>10-20</u>	<u>20-40</u>	<u>40-60</u>	<u>60-80</u>	<u>80-100</u>	Total
Kailahun	89.5	10.5	0.0	0.0	0.0	0.0	100
Kenema	82.9	14.3	2.9	0.0	0.0	0.0	100
Kono	78.6	21.4	0.0	0.0	0.0	0.0	100
Bombali	66.7	27.8	2.8	2.8	0.0	0.0	100
Kambia	60.0	26.7	13.3	0.0	0.0	0.0	100
Koinadugu	100.0	0.0	0.0	0.0	0.0	0.0	100
Port Loko	80.0	17.1	0.0	0.0	2.9	0.0	100
Tonkolili	100.0	0.0	0.0	0.0	0.0	0.0	100
Bo	78.6	14.3	7.1	0.0	0.0	0.0	100
Bonthe	94.7	5.3	0.0	0.0	0.0	0.0	100
Moyamba	88.9	5.6	5.6	0.0	0.0	0.0	100
Pujehun	100.0	0.0	0.0	0.0	0.0	0.0	100
W/Area Rural	70.8	25.0	1.4	2.8	0.0	0.0	100
W/Area Urban	60.6	24.8	3.7	7.3	1.8	1.8	100
Sierra Leone	75.6	18.1	2.8	2.4	0.7	0.4	100