

CAPTURING THE GAINS



*economic and social upgrading
in global production networks*

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Economic and social up(down)grading in
tourism global production networks:
findings from Kenya and Uganda

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Abstract

This paper presents preliminary field research findings on tourism global production networks (GPNs) in Kenya and Uganda. It addresses the questions of whether economic upgrading in the tourism global production network leads to social upgrading for workers, small producers and community members in tourism localities, and what conditions support it. It further examines whether the relationship is different in mass vs. community-based tourism. The paper finds that: social upgrading outcomes can follow economic upgrading, but typically only for certain groups of workers; practically all firms use multi-labour strategies and make independent decisions on strengthening labour protection and standards; 'mass' tourism subsectors are more likely to lead to social upgrading than small-scale, community ethnic tourism; and there are acute racial, ethnic and gender divisions between firm ownership, job placement, and sub-segments in the GPN.

Keywords: tourism global production networks, Kenya, Uganda, economic and social upgrading, casual work, gender, race

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Introduction

Debates have grown over the last 30 years regarding the use of global tourism as an economic development model (de Kadt 1979; Britton 1993; Honey 1999; Sinclair 2007). What was traditionally missing from this analysis, however, was an investigation of the tourism global production network (GPN) and how it intersects with a destination's economic, political and social history, and current landscape, to shape participation and economic rewards. Furthermore, economic participation, and its relevant contribution to national economic indicators, only tells half of the development story. The social side – how workers, small entrepreneurs and communities are situated in the global production network – may represent a vastly different reality in terms of exactly who is benefiting and how. Thus, economic upgrading in tourism global production networks may lead to social upgrading, but it is in no way a guarantee.

Capturing the Gains tourism research situates itself within the tourism development debate context and the increased interest of donor and policy bodies to support global tourism (UNCTAD 2010: xi). The basic research question is: does economic upgrading in the tourism global production network lead to social upgrading for workers and small producers and what are the conditions that support it? We further ask, is the relationship different in mass vs. community-based tourism?

In this working paper, we address these questions with preliminary findings from field research conducted in Kenya and Uganda. For scope purposes, we chose two destination locations in Kenya that represented mass (Mombasa) and ethnic and/or community tourism forms (Maasai Mara). Due to the lack of a mass tourism market in Uganda, we focused on community and nature tourism in and around Murchison Falls National Park (MFNP). We conducted original field research.

Our findings, analysed throughout the paper, highlight four main findings regarding the relationship between economic and social upgrading. First, social upgrading outcomes can follow economic upgrading, but typically only for permanent workers and independent artisan groups, entrepreneurs, and communities who are strongly connected with distribution options to the GPN. Second, practically all firms use multi-labour strategies, regardless of upgraded status, and firms typically make independent, voluntary decisions regarding strengthening labour protections and standards. Third, typical 'mass' tourism subsectors (e.g. large hotels) are more likely to lead to social upgrading outcomes than small-scale, community ethnic tourism products. Fourth, there are acute racial, ethnic and gender divisions between firm ownership, job placement, and sub-segments in the GPN. The roles of firm choice, trade unions, associations, the structure of labour and land policies, and historical embedded environments (like gender and ethnic norms) are principal conditions influencing upgrading pathways and outcomes.

African tourism products and background statistics

The case countries have both experienced increased visitor arrivals, tourism contributions to GDP, total employment, and visits to their national parks (see Table 1) with percent figures for tourism, in comparison to other sectors, hovering between seven and 11 percent. Kenya is a key regional tourism actor that, as we will address, is changing in some form from global production networks to regional production networks. Its strength as a dominant regional player, however, has not hidden

the challenges that many of its internal tourism destinations face – e. g. low occupancy rates. The emergence of regional lead firms on its borders has maintained challenges for specific workers, small producers, women, and racial and ethnic groups.

It is important to study the participation of African countries and internal destinations in the production network because the continent, although still a relatively small player in global tourism, is poised to be a leader in the next wave of tourism to the developing world (Rogerson 2007). Africa was the only region during the financial crisis to display positive figures in 2009, and maintained growth thereafter (UNWTO 2012). With the exposure granted to South Africa due to the 2010 FIFA World Cup, Africa positioned itself as a dynamic tourism market. Regional variations exist between predominantly Arab North Africa and sub-Saharan Africa, and South Africa and North Africa gain most of the visitor arrivals (Rogerson 2007). Nonetheless, the importance of tourism for sub-Saharan Africa cannot be understated. Outside of agriculture, tourism is one of the few global industries that has less stringent barriers to entry, needs multiple skilled workers, and, particularly, harnesses local knowledge, so that locals can become self-employed guides, micro-entrepreneurs, artisans, or fill various low-skilled positions. Sub-Saharan Africa is also home to some of the world’s most spectacular natural sites, wildlife and traditional cultural groups. The difficult task Africa faces, however, is to foster ‘shared growth’ and to turn ‘survivalist’ and ‘marginal’ micro-entrepreneurs into sustainable businesses, giving workers Decent Work options (Rogerson 2008). Moreover, the legacies of colonialism and apartheid continue to be witnessed in tourism, through racial divisions in business ownership and labour (Harrison 2001; Rogerson 2004; Cornellisen 2005).

Table 1: Case descriptive statistics

| | Kenya | | Uganda | |
|------------------------------|------------------|-------------------|----------------|------------------|
| | 2000 | 2011 | 2000 | 2011 |
| Visitor arrivals ‘000 | 1,036,500 | 1,095,945 | 200,000 | 1,084,000 (2009) |
| Number of hotel beds | 7,765,700 (2003) | 17,125,300 (2009) | N/A | 1,656,089 (2008) |
| Hotel occupancy rate | 33% (2003) | 36% (2009) | N/A | 30% (2008) |
| Number of tour operators | N/A | 2,075 (2003) | N/A | 164+ |
| Tourism contribution to GDP* | 1.29* 10% | 4.472* 13% | .526* 8% | 1.695* 9% |
| Total employment ‘000 | 424.8 8.9% | 778.3 11.8% | 337.8 7.3% | 522.67 8% |
| National Park visits | 1644.8 | 2385.3 (2009) | 128,810 (2005) | 151,059 (2009) |

* millions USD.

Sources: World Travel and Tourism Council; Ministry of Tourism Kenya; Uganda Wildlife Authority; Uganda Ministry of Tourism, Trade and Industry.

Kenya is one of the most well-established tourism destinations in sub-Saharan Africa, with tourism beginning during colonialism and emerging as a key growth area post-independence (Sindiga 1999; Akama 2004). Kenya as a national destination is at a crossroads, and both locations we examine – Maasai Mara and Mombasa – although exhibiting strong visitor numbers, are struggling with challenges associated with over-development and resource management (World Bank 2010). Tourists visit the Mara for its reputation as a popular destination to view the ‘Big Five’ (lions, elephants, rhinos, buffalo and leopards) and the romanticised pastoralists, the Maasai. Mombasa is the closest example of the typical mass tourism model of large hotel resorts and all-inclusive packages. While mass tourism is present, poverty is persistent and chronic for most people in the province. Both locations are closely interconnected with the global production network, but there are strong economic and social upgrading outcomes based on race/ethnicity, regions, and gender.

Uganda, in contrast to Kenya, has only entered the global production over the last 15 years. For decades following its independence, Uganda struggled under civil war, and has been slowly rebuilding its economy since the 1990s. During colonialism Uganda held a somewhat mystical fascination for the ‘white hunters’ who roamed East Africa prior and post-WWII, and was called the ‘Pearl of Africa’ by Winston Churchill (Herne 1999). But image, logistical and capacity issues have kept Ugandan tourism in the shadow of its East African competitors. Murchison Falls National Park, the second largest national park in the country, has faced even more constraints, due to its location in the northern region of the country. It is one of the least developed areas and was home ten years ago to the guerilla group, the Lord’s Resistance Army. Visits to the Park, however, have slowly grown over the last decade. In 2009, 17,523 foreign tourists of the 39,237 total came to the Park. The foreign markets that visit the area are American, European, and Asian-Ugandans from the diaspora.

Distribution channels to destination cases and firm drivers

How, and the forms by which, international tourists buy their tourism products – the distribution channel – is a useful heuristic tool to distinguish linkages and power relationships between tourism firms along the global production network. There are multiple distribution channel options to our destination examples, but tour operators are the deciding link in shaping the arrangement of the GPN and subsequently embodying the upgrading pathways and challenges therein. In Figure 1, we map out the most prominent distribution channels representing how tourists arrive at our Kenyan and Ugandan destinations.

Global tour operators are the critical economic actor, bundling all or significant portions of the inbound tourism service providers together. The rise of the global tour operator, nonetheless, has also coincided with the rise of national tour operators, based out of Nairobi and Kampala transporting centres, that are elite suppliers to global operators. Moreover, in destinations the accommodation segment also acts as a local driver in steering tourists.

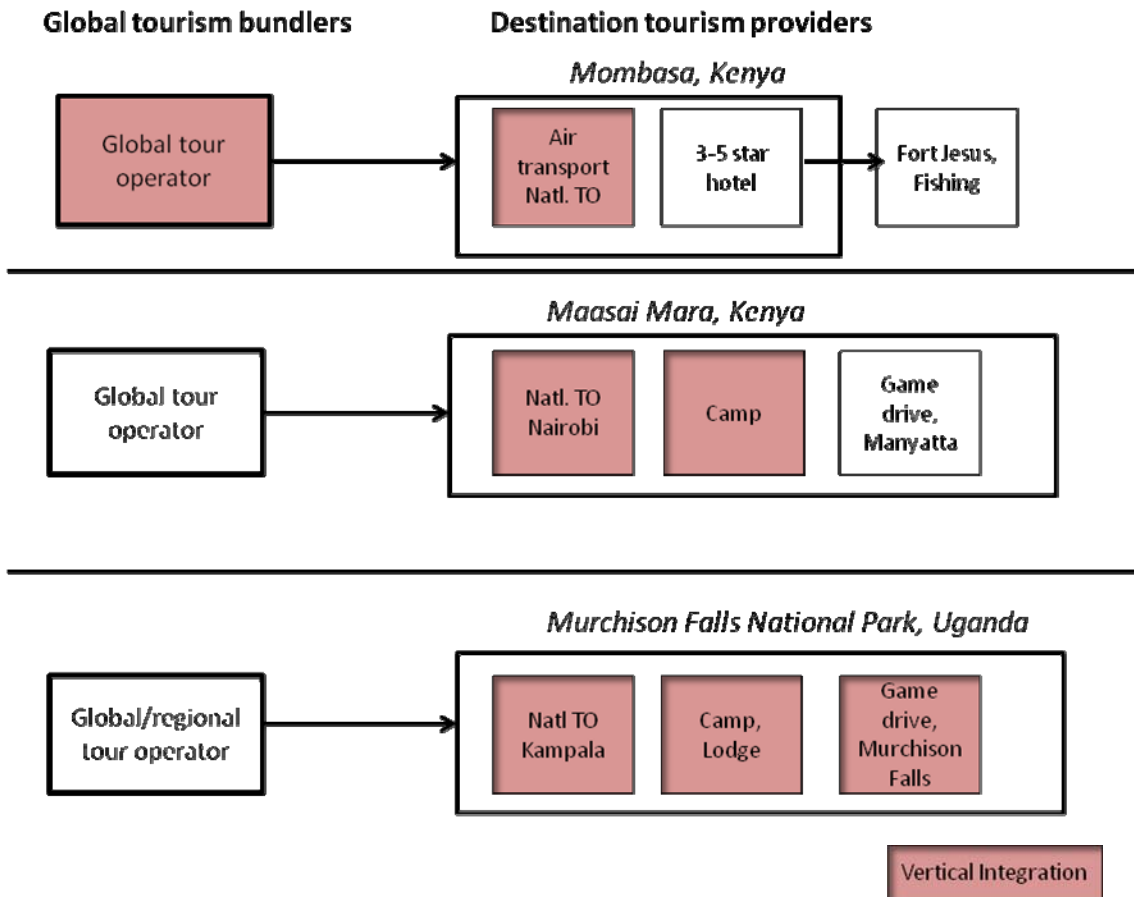


Figure 1: Distribution channels to African cases

There are three common distribution channels to Mombasa, Kenya: (1) Global tour operators, who arrange all-inclusive/full-board packages at resort hotels; (2) national tour operators in Nairobi and Mombasa, who place Mombasa hotels on their itineraries; and (3) website platforms via online travel agencies or hotel direct booking. Option (1) (see Figure 1) is very popular and typically entails the global operator using one of their charter air carriers to transport tourists to Mombasa. Here they are met at the airport by subsidiary national tour operators and transported to their hotel, which they may never leave, except for organized excursions arranged by the hotel. Sole charter air companies are also important bundlers. Akama and Damiannah (2007: 746) describe the Mombasa tourism experience as one of 'highly restricted movement'.

The World Bank's (2010) detailed study on the price breakdown between the components of various package arrangements from outbound markets to Mombasa exposes the challenge that many mid-range hoteliers face when negotiating with global tour operators and charter air flight services. They note that for a nine-day, seven-night full-board beach package, the hotel must cover all costs, including overhead and profits, for just US\$55.71 per person per bed-night. They estimate that, in order to break even, hotels must have a seven-month, 65 percent occupancy rate (representing number of rooms sold); a rate much higher than the typical 30 percent range. The dominant European global tour operators with which the hoteliers negotiate represent economies of scale. Because the coast competes on price in the beach mass tourism market, many suppliers have limited negotiation leverage. The 11 top tour operators in Table 2, with which coast hotels have agreements, cumulatively represent only three global travel firms – TUI Travel, Kuoni and REWE.

Table 2: European global tour operators with packages to Mombasa

| Firm | Ownership | Brands | Brand products | Source market | Country destinations | Coast hotels |
|--------------------|-----------------------|--------|--|------------------|----------------------|--------------|
| TUI Travel | UK | 200+ | Tour operations, aircraft, retail, accom. online retail, accom. wholesaler, excursions | 27 | N/A | N/A |
| TUI Germany | Part of TUI Travel | 16 | Tour operations, retail, accom., air carrier | Germany | | 25 |
| TUI Holland | Part of TUI Travel | | Tour operations, retail | Holland | 75 | 13 |
| Hayes & Jarvis | Part of TUI Travel | | Tour operations, retail | UK | 55 | 12 |
| First Choice | Part of TUI Travel | | Tour operations, retail | UK | 80 | 10 |
| Pollman's* | Part of TUI Travel | 2 | Tour operations | Europe | 2 | 8 |
| Kuoni** | Swiss | 12*** | Leisure travel, destination services | 40 | 80 | 9 |
| Private Safaris | Part of Kuoni | 2 | Regional tour operations | Europe | 5 | 5 |
| Helvetic Tours | Part of Kuoni | | Tour operations, retail | Swiss | 35 | 10 |
| Meier's Weltreisen | Part of REWE, Germany | | Tour operations, retail | Germany, Austria | 80 | 20+ |
| Jahn Reisen | Part of REWE | 2 | Tour operations, retail | Germany | 42 | |

Source: Field notes, company websites and annual reports.

'Coast hotels' column represents number of hotels located in coast operator uses.

* Started as Kenyan-owned company.

** Also own Kunoï Mara Bush Camp in the Mara Siana Wildlife Conservancy.

*** Number of large brands, but have more sub-brands.

Maasai Mara in Kenya is highly driven by global tour operators, as well, but national tour operators play a vital role in organizing, arranging and executing the entirety of the tour. Many national tour operators also operate their own safari camps, either inside the reserve, just outside it, or in one of the many private conservancies that have proliferated since the breaking up of the Maasai group ranch land structure. National tour operators will arrange group and individual travel tours at multiple national and regional destinations that include the Maasai Mara. Clients will stay at camps owned and operated by them or within the abundant selection of camps that have rocketed in the Mara over the last decade. All activities are typically included in these packages – for example,

game drives, night drives, walking tours – but camps also have the opportunity to steer activities for their clients. Almost all camps work with a selected local Maasai *Manyatta* to arrange tours with the village and potentially see traditional dances and artisan activities. Commonly, both tour operators and the camps also include school visits and/or any community projects they might be supporting as additional excursion options.

As with the Maasai Mara, the tourism sites close to and at Murchison Falls National Park in northern Uganda receive tourists through the trips organized by national tour operators, with many working directly with global and regional tour operators. The scale of tourism in the area is much smaller than in the national parks in Kenya and national tour operators. There are fewer than ten accommodation facilities inside and around the Park, and a little over five in Masindi town (a gateway city to the Park) that cater to tourists. The main accommodation offerings also operate tour companies that transport their guests to the Park and in addition receive clients from other tour operators. Excursion activities are organized as part of the tours or can be booked with the accommodation provider. Paara Safari Lodge (which also owns Chobe Lodge on the northern side of the Park) operate their own fleet of safari vehicles for game drives, and boats for river cruises down the Nile to Murchison Falls. There are no excursion activities to surrounding community villages, however, as there are with the Maasai in Kenya.

Firm economic upgrading

In each of our destinations, we can identify firm economic upgrading through production network segments. As the distribution channels demonstrate the pathways by which firms gain access to international tourists, they also address how those firms which have access, and are driving the production network – tour operators and accommodation providers – have product- and functionally upgraded. Accommodation providers product upgraded via opening new facilities, beds, or enhancing their luxury scale, and tour operators functionally upgraded by adding on additional services, such as excursions and accommodation. Distinctively, however, these segments are also highly fragmented. In Kenya, in particular, there was functional upgrading of elite tour operators, who open safari camps/lodges and participate in developing conservancies. At the same time, there was a rapid expansion of guides/drivers and/or former tour operator employees who open their own companies, or become independent, self-employed workers, but cater to different product markets – less exclusive, more modest and budget-oriented.

Similarly, in the accommodation segment in both countries, there is product upgrading and, in some cases, functional upgrading, of hotels that were able to open new facilities, renovate and open their own tour operations that transport clients to their properties. These elite hotels, which are commonly foreign-owned, international brands, or niche-based, are separated from the abundant mid-range budget options. Furthermore, there is also product downgrading, as accommodation providers in Mombasa have been unable to compete in saturated mass markets and have closed their facilities, experienced deterioration and declining occupancy rates, or gone into redundancy.

Hence, while there is both fragmentation, and consolidation and concentration taking place, there are different groups of economic actors who fill those categories. These actors are divided by nationality and regional hub in a destination, and by race and ethnicity, and gender. More

frequently, those firms that are owned by black Africans are excluded from international networks, lack standards (including some subjective standards on ‘service’ and ‘trust’) and financial resources, and subsequently may be participating in the GPN, but are in ‘survivalist’ or ‘marginal’ roles. Functional upgrading in the tour operator segment in Kenya is instructive on this point. Of the 19 Kenyan national tour operators highlighted in Table 3, who represent category A operators (highest turnover rate) within the Kenyan Association of Tour Operators, we were able to identify only one company that was owned and managed by an African Kenyan who was also a woman, but she ran the business in partnership with her white, foreign husband. A portion of these companies represent the elite tour operator firms who have functionally upgraded, and opened and operate the most luxurious and exclusive safari camps, execute game drives, and are continuously expanding their products and, recently, pioneering new tourism conservation models.

Table 3: Category A national tour operators in Kenya

| Firm | Ownership | Camp/Conservancy |
|-----------------------------------|----------------------------|---------------------------------|
| Abercrombie & Kent | UK | Mobile and perm. camps |
| African Horizons Travel & Safaris | Denmark | |
| Bush&Beyond** | Foreign | 14 camps |
| Cheli & Peacock | White Kenyan | 4 camps in 4 conservancies |
| Express Travel Group | N/A | |
| Gamewatchers | UK/White Kenyan | 4 camps in 4 conservancies |
| Jade Sea Journeys | African Kenyan woman | Mobile camps |
| Kobo Safaris | N/A | |
| Liberty Africa Safaris | Austrian | Mobile camps |
| Origins Safari | White Kenyan | |
| Rhino Safaris | South African | |
| Somak Travel | Asian Kenyan | Ashnil Lodges |
| Southern Skys Safaris | White Kenyan | 2 camps in 1 conservancy |
| Transworld Safaris | Asian Kenyan | |
| Twiga Car Hire & Tours | Asian Kenyan | |
| Vintage Africa | Asian Kenyan/South African | 2 camps Kenya; 3 camps Tanzania |
| Wildlife Safari | Asian Kenyan? | |
| Wild Trek Safari Africa | N/A | |

**central reservation group (e.g., camps individually owned but jointly marketed).

Source: Kenya Association of Tour Operators, and websites.

Elite upgraded hotel firms also embody new regional lead firms, who are beginning to shape tourism development opportunities in other African less developed countries and in the communities in which they are locating. Hotel groups, such as Serena and Sarova in Kenya and Marasa Holding and Geolodges in Uganda, and the numerous hotel and camp groups who specialize in African safari locations, are expanding into neighbouring countries and becoming suppliers of choice for global and national buyers, but also engines for African-centred tourism development. These hotels/camps anchor tourism development in emerging destinations. Their business policies regarding labour and community involvement are a crucial catalyst (or not) of social upgrading opportunities and community and self-employed chain upgrading. These firms are the key link in deciding whether community artisans have outlets for their crafts and dance, whether they can supply provisions, or whether they can execute other local tourism services for

their guests, essentially providing access or exclusion from entering the production network. Whereas the chosen Maasai groups of Kenya are included and chain upgraded, the villages and artisans around Murchison Falls and Mombasa are not.

Determinants of economic upgrading

There are several traits and indicators we were able to identify that distinguished upgraded firms by their ability to be successful in the sector. The firms within the production network that had direct access to international tourists, arranged the logistics and services for tourists, had brand appeal, and had the ability to meet the needs and standards of global buyers, upgraded and could further dictate private governance relationships to other firms along the chain. The most successful nationally upgraded firms, such as the operators and hotel groups highlighted, also met a subjective 'trust' factor standard.

Direct access to international markets was typically created through marketing capabilities and the ability to travel to international travel fairs. It is extremely expensive to market to these audiences, but attendance is critical because many tourism contracts are signed and new providers chosen at travel fairs held in locations such as Berlin, London and other European destinations. It is extremely important for suppliers to give buyers face-to-face time and to 'pitch' tourism services. If national providers cannot make it to these large events, they try to do 'tours' of multiple buyer offices in international markets to market their services further. It is cost-prohibitive for many national tour operators, excursion providers and hotels to attend these events, particularly the smaller providers. Those providers that are able to compete at this level also become proxy representatives for entire destinations.

One of the formal standards and needs of global buyers is that tour operators have the ability to organize and arrange all of the country tourism services, including creating itineraries, choosing in-country destination suppliers, and executing tours. Global buyers want national suppliers to bundle services together, so that they can offset their own risk and uncertainty about a destination. For hotel suppliers, size and brand are important to ensure room capacity, and a guarantee of international service. Safety and insurance, and environmental and guide certifications, are also growing concerns.

Price and commission rates are also important formal standards required by global buyers, but also by national buyers and tour arrangers in destinations. When there is more equality of suppliers in terms of other standards, many try to compete on price and global buyers attempt to push price points down – to the detriment of some suppliers and labour structures. Furthermore, the way that smaller providers, such as community groups or excursion operators, provide for commissions often puts them in a disadvantageous position with different forms of tour operators, such as tour company drivers, because some demand high commissions or percentages from sales made.

In addition to the formal standards, there are informal standards that separate upgraded firms. 'Service' and 'informal standards' carry heavy importance, particularly for global buyers, in comparison to 'objective' or traditional standards that we think of for other sectors. Because for tourism the product itself is an 'experience', soft-skill, subjective, informal requirements, such as wanting their suppliers to 'get them', 'understand tourism' and the 'needs of the clients' help to guide supplier choices.

In addition, the successfully upgraded firms have harnessed new technologies, such as internet marketing – including social media sites on Facebook, Tripadvisor and YouTube – and have relied on multiple marketing and distribution platforms to sell their products. The advent of the internet and its wide availability in urban centres has made it easier, particularly for smaller tour and excursion operators and drivers, to enter the production network. This is partially why we see both concentration and fragmentation of the market. It is the former group of concentrated firms – who cater to the higher margin international tourists and have international market contracts – who, ultimately, have the technological and economic capabilities to harness the new distribution options that come with internet technologies. Placing their products with online travel websites has diversified, for example, many accommodation providers' reliance on tour operators or wholesalers. These new websites are expensive and there are still many providers who cannot use the platform. A large proportion of firms in Africa – even elite providers – still struggle with computer reservation bookings. This makes it difficult for them to cater to independent travellers who want to make their arrangements prior to travel.

The national tour operators and hotel groups that are the most successful at packaging and marketing to global buyers and not competing on price are those that have had an economic, marketing and 'informal standard' advantage when tourism began to develop. In Kenya, contemporary global tourism arose from the 'white hunter' safari tourism during colonialism, and those safari outfitters were poised to transition to 'camera' shooting tourism when hunting was banned. In Uganda, Asian-Ugandans held an economic elite role during colonialism. Although they were expelled from the country during Idi Amin's reign, they returned under Yoweri Museveni and, with a few white expatriates, created the first tour companies and hotel groups for tourism in the late 20th century. We also see how ethnic and racial ties, kinship networks and subjective standard assumptions could act as exclusionary mechanisms.

Social upgrading – workers and communities

With the economic upgrading trajectories we documented (functional upgrading of tour operators, product upgrading of hotels, chain upgrading of self-employed and communities), we found mixed results on whether they led to social upgrading indicators for workers and communities. First, broadly, measurable standards (i. e., wages, working conditions and benefits) improved for permanent and contract workers at hotels, camps and tour operators, but casual workers had no improvement in standards. It is difficult, nonetheless, to make a determination for contract workers because, although their rights and benefits are granted, they are on limited time durations and many have to start as casual workers again prior to receiving another contract. In addition, while some benefits and conditions improved, others did not, and some indicators particular to tourism workers – in comparison to community members outside of tourism localities and self-employed workers – such as hardship wages and transportation options, took on greater importance, and were commonly lacking. Workers' enabling rights also showed mixed findings. The hospitality workers' union played a crucial role in both countries, but membership was low and did not extend beyond larger hotels and some camp workers. Small hotels, tour operators and guides were not union members. We did not find any examples of forced or child labour, but we did not analyse family restaurants and tourism sex workers, two areas where child and forced labour is widely documented (ECPAT 2008; UNWTO 2011).

Second, all the case destinations employed multi-labour strategies, but there are differences of level and intensity in how the segmented labour force was used. Table 4 is a conceptual numerical estimation of the category of worker breakdowns between the three cases. Kenya had the most 'mixed' results. In the sample of providers analysed it was difficult to determine general patterns. One firm may have just a few casual workers, while another may have over a third casual workers (see Table 5 in next section). In Murchison Falls there were consistently more permanent and contract workers found. Common to all, however, was the fact that there were relatively fewer women workers than men. A common theme that emerged in the firm analysis was that firms made independent choices regarding how they structured their labour strategy and whether they supported social upgrading measurable standards and enabling rights.

Table 4: Categories of workers in cases

| | Perm. | Contract | Casual | Women |
|-----------------|-------|----------|--------|-------|
| Mombasa | ** | ** | ** | * |
| Maasai Mara | ** | ** | ** | * |
| Murchison Falls | *** | *** | * | * |

* limited

** mixed findings, depending on firm

*** many

Third, self-employed workers/entrepreneurs and communities where tourism is based have struggled more in chain upgrading and in gaining from tourism's growth. It is difficult for community artisan groups and micro-enterprises to gain access to distribution channels and they struggle in survival mode, relying heavily on donor/NGO assistance. Moreover, in Maasai Mara and Murchison Falls site locations, community involvement is either stratified (Maasai Mara) or almost entirely excluded (Murchison Falls). Involvement of the Maasai in gaining from tourism enterprise is widely marketed by national tour operators and camps, particularly through land-leasing fees received, job opportunities, and social programmes conducted by tourism firms, but location is the key factor in determining whether the Maasai are able to make income from wildlife-based and community tourism. The community groups located closest to the Reserve are better situated. In contrast, the villages around Murchison Falls National Park still languish in poverty and the struggles of daily life without electricity, water, healthcare and sanitation. There are very few linkages to the tourism development taking place. Importantly, this finding highlights the challenges for community tourism. It shows that social upgrading, albeit dependent on firm and category of worker, may be more likely to happen if an individual is employed at a large mass tourism hotel (Mombasa) or as a waged worker at camps and hotels (Mara and Murchison Falls)

Fourth, the patterns that are emerging between firms that have economically upgraded and whether this has assisted social upgrading point to ethnicity-race-region and gender differences. Urban and up-country workers (Nairobi and Kampala) filled labour ranks, expatriate ownership and management was common (Mara and Murchison Falls), and women were frequently lacking in waged-work positions (Mara and Mombasa).

Functional upgrading of tour operators

Functional upgrading of tour operators (see Figure 2) who operate camps has led to social upgrading for permanent tour operator employees, permanent and contract camp workers, and

Maasai landholders. In Kenya, some top upgraded companies pay employees over US\$300 a month and top driver/guides can make over US\$100 a day, but others earn US\$5-10. Low-skilled camp workers can make between 6,000-7,000 KES per month (roughly US\$71-83) plus tips. Although this is low, it is higher than up-country wage rates. There is evidence that wage rates, however, are too low to cover all the costs of rural living.

General findings for workers were as follows. Regarding gender, most African women are in job-segregated categories in tour-operating offices and are not driver/guides, who have the chance to make some of the best wages with tips. All women (except foreign white women) are practically excluded from camp employment (highly in Maasai Mara and to a lesser extent in Murchison Falls). There also exists a division of labour of camp work; in Maasai Mara, workers are male guides, and low-skilled attendants like waiters; in Nairobi and outside of Northern Uganda they are chefs and head guides; and white foreign couples work as managers.

There are additional questions regarding how fees from camp operations and tourism facilities on community lands are being distributed. For example, it is unclear how conservation fees are distributed once Maasai landholders receive them; but some conservancies, such as the Olare Orok and Ol Kinyei (two of the six in the Mara ecosystem), run by Gamewatchers, Great Plains Conservation camps group, and Kicheche Camps group, have together given US\$400,000 to Maasai landholders through monthly income rental fees (which increase annually) and bed-night fees. In Murchison Falls National Park, 20 percent of park entrance costs go to surrounding communities. In 2011, five parishes together received 8.4 million UGX (just over US\$4,000) and built staff quarters for teachers. This is, however, a relatively low sum to split amongst parishes and have a meaningful impact.

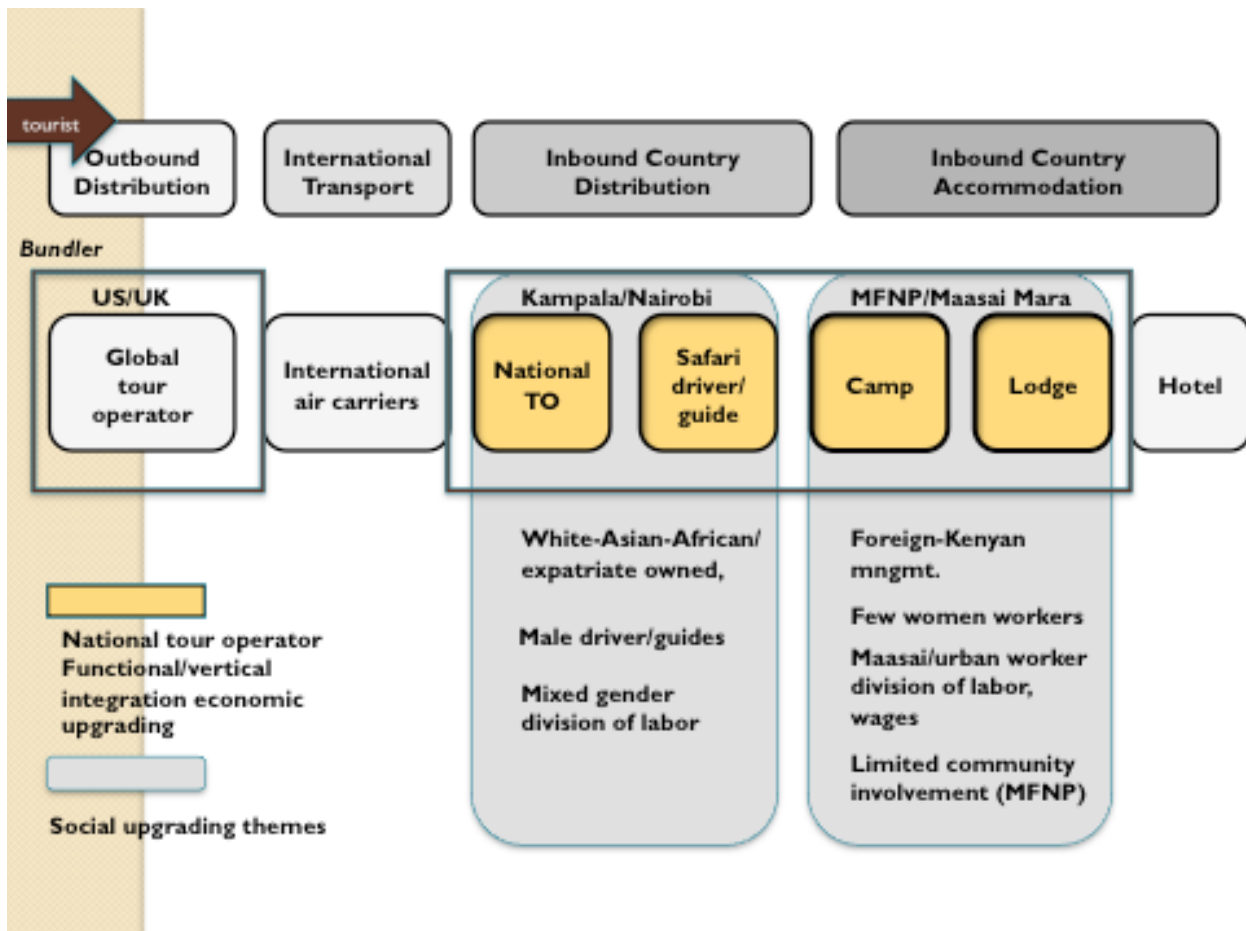


Figure 2: Tour operator functional upgrading and social upgrading themes

Within this upgrading trajectory there is an additional embedded upgraded category of guides who once worked for elite tour operators and have used that experience to become tour operators. Once they upgrade, however, they cater to different tourism markets and are mostly kept out of direct international linkages. Furthermore, women are mostly excluded from this upgrading pathway and few guides in Uganda have realized this opportunity.

Product upgrading of hotels

Product upgrading of hotels, e. g. hotels adding rooms, beds and other amenities, has led to social upgrading for permanent and (mostly) contract workers, but downgrading for casual workers. All hotels use casual workers, regardless of their economic position, and it is difficult to make pattern generalizations about which ‘types’ of upgraded hotels use less or more casual workers. In Mombasa, in a sample of five upgraded hotels (see Table 5), some have fewer than half of total workers as permanent workers and the bulk as casual and contract workers. Through interviews, we found that one very popular and busy hotel (not in the sample) had virtually no permanent workers and almost all contract and casual workers, but if an employee was able to obtain a permanent designation they received the highest wages and benefits. Regardless of the unlikelihood of permanent status, this hotel was still the most sought after for employment.

More specific findings include the following: gender job-segregation was limited, but most hotels had male employees and most management was male. In Mombasa, most employees came from ‘up-country’, which means not in Mombasa, and women were potentially subject to sexual harassment. Female casual workers were especially vulnerable, as they had no recourse options.

Table 5: Sample of Mombasa hotels and category of worker divisions

| Hotel | Ownership | Total workers | Permanent | Contract | Casuals | Interns | F[^] | % F |
|---------------------|------------------|----------------------|------------------|-----------------|----------------|----------------|----------------------|------------|
| Hotel 1 | Foreign-Kenyan | 302 | 130 | 40 | 90 | 26 | 80 | 26% |
| Hotel 2 | Foreign | 300 | 169 | 3 | 42 | 15 | 45 | 15% |
| Hotel 3 | Kenyan | 252 | 72 | 80 | 100 | n/a | 53 | 21% |
| Hotel 4 | Kenyan | 120 | 6 | 97 | 13 | 10 | 54 | 45% |
| Hotel 5 * | Kenyan Asian | 100 | 67 | 30 | 3 | n/a | 19 | 19% |

* Outsource laundry; [^]Female; %Female

Source: field interviews.

More commonly, we found that specific hotels and brands in Kenya, Uganda and South Africa voluntarily chose to make strong labour protection and benefits part of their business strategy, while others did not. The elite hotels which upgraded – such as the Serena, Marasa Holdings and, in some indicators, Geolodges – mostly had all permanent workers, who received benefits such as free healthcare (plus insurance for their families), transportation to work (or transportation fees), family support policies (like family visits), annual wage increase, etc. In a country like Uganda, which has a weak labour framework and weaker enforcement, firms have a lot of labour discretion. Despite this, a couple of hotels in and around Murchison Falls National Park chose to start the low- to mid-skill wage range at a higher level (see Hotel 4 and Hotel 10 in Table 6). In the sample of

hotels/tourism sites in and around Murchison Falls National Park in Table 6, wages started as low as 100,000 UGX a month (roughly US\$40) to 400,000 UGX (US\$160). In addition, because hotels have multi- and advanced skilled labour needs – with several department heads, supervisors and managers – these positions are paid relatively well.

Table 6: Low- to mid-skill wage range for hotels/tourism sites in and outside MFNP

| Firm | Wage range | Permanent workers* | Contract workers* | Casual workers |
|----------|------------------------|--------------------|-------------------|-----------------------|
| Hotel 1 | 150,000-300,000 UGX | x | | |
| Hotel 2 | 60,000-120,000 UGX | | | |
| Hotel 3 | 100,000-150,000 UGX | | | 60,000 + |
| Hotel 4 | 250,000 - 400,000+ UGX | x | | |
| Hotel 5 | 100,000-300,000 UGX | x | | |
| Hotel 6^ | 100,000+ UGX | | x | 60,000 UGX+ month |
| Hotel 7 | 130,000-230,000 UGX | x | | |
| Hotel 8 | 140,000+ UGX | | x | |
| Hotel 9 | 150,000+ UGX | x | | 3,000-4,000 UGX a day |
| Hotel 10 | 250,000+ UGX | x | | |

* X represents if wage range of workers were permanent or contract.

^ Wage discrepancies reported to author between workers and managers.

Source: field interviews.

There are, nonetheless, still challenges with these standout hotels and the hotels that have upgraded, because they are employing precarious labour techniques. Most of the hotels, even the most prestigious like a Serena, use casual workers to offset risk and bolster labour requirements for special needs alongside day-to-day ones. It was common to find casual workers who remained casual indefinitely for years. Workers also complained about wage disparities. Up-country workers (in Maasai Mara and Murchison Falls) are paid less than workers in Nairobi and Kampala. The increased cost of living in these areas makes it difficult to reconcile these wage schemes. Moreover, in a couple of hotels we found that workers from urban centres were paid more than the up-country workers who were doing the same job in the same hotel – sometimes the local worker even trained the new worker who was being paid more.

There are also unmeasurable hardships endured by workers who migrate to work in tourism hotels and camps. Typically, in Murchison Falls and in the Maasai Mara, workers live on-site and may only travel home once a month. The conditions on site are not horrible, but not ideal. Workers often share a small concrete room and may have access to running water or just a bore head, depending on the hotel/camp. The hotels provide for meals, but may charge for electricity. Isolation from families is difficult and made even more so when young children are involved. If a worker is from a nearby village, there is virtually no transportation to and from work, and many spend countless hours on bicycles, walking or trying to negotiate rides. This is partly why there are so few women. In addition, even in destinations that are not remote, such as Mombasa, workers may live far away from the hotels and work erratic hours, so transportation is also an important issue. Several women told us about the challenges they face getting to and from work and the dangers they experience when coming home late at night.

Entering the production network/chain upgrading for artisan groups, drivers, guides and communities

In the case destinations where tourism is growing, it has mostly brought limited social upgrading for self-employed workers and community groups. Hotels in our destinations select excursion providers and drivers based on established networks and commission rates, leaving little work left for those out of the network. Guide associations have emerged that support the professionalization of the sub-sector,¹ but in Mombasa, guides in the Old Town are typically not included in the packages arranged by hotels and tour operators, who use their own guides. In Mombasa, independent guides may be employed by the big local tour operators on a casual half-day basis, where they can make up to 2,400 KES a day (around US\$28). Some artisan groups are selling and performing at hotels, but they are paid little and many are in remote destinations and struggle with transportation. Lastly, certain Maasai communities are benefiting, but not others and, significantly, none are in Murchison Falls.

More specifically, we found that artisan work and outlets are gendered in Kenya. 'Beach boys' – who sell wares on the beach and sometimes at hotels in Mombasa – are all men, as are the Akama woodcarvers, who have a co-operative in Mombasa (although they are paid very little and are lucky if they make 5,000 KES, or US\$60, a month).² The term 'beach boys' is also used pejoratively to connote male sex worker. Female cultural tourism products further north and inland in Mombasa are excluded from hotel distribution options. Women Maasai create jewellery to sell to tourists at their *Manyattas* and at camps, but they have to share the proceeds with their husbands and the male-controlled *Manyatta* council.

Moreover, while many Maasai *Manyattas* are benefiting from having tourism develop on their land, the leasing fees are given to men and the male leadership of conservancies. How the Maasai are benefiting depends on their geographic position relative to the Mara. Homewood and colleagues (2009) argue that in total only a small proportion of Maasai households outside the Mara (three to 14 percent) receive wildlife-related income. The Maasai are also the only prominent ethnic tribe that is marketed through tourism, although there are 42 ethnic tribes in Kenya. In contrast to the Maasai, community members around Murchison Falls National Park are involved very little with tourism. They can supply oranges and chickens, but little else, and their goods are not commonly chosen and, when they are, hotels try to negotiate lower price points. The communities we spoke to said it was not worth it and too expensive to try to sell to hotels.

Linking economic to social upgrading?

We found in most of our cases that firms made voluntary business strategies either to support social upgrading outcomes or not, particularly in the absence of a legal framework that mandated or enforced labour protection and rights for all workers. There was also little to no 'market' for

¹ In Mombasa a few older guides started a local guide association for Fort Jesus and Old Town-based guides. To get into the group you need: (1) a sponsor letter from a tour operator or local business, a reference letter; (2) a certificate of good conduct from the Kenya police, which costs 1,000 KES; (3) tourist guide lessons, which cost around 2,000 KES. Association members have access to training, and the Mombasa and Coast Tourism Association will give free classes, such as language.

² Most artisans carve between five and ten pieces a month and work 12-hour days, from 6 a.m. to 6 p.m. Whenever they sell a piece they receive 80 percent of the price and 20 percent goes to the co-operative. One artisan told me that on a good day they can buy meat and on a bad day they only eat the basic dish of rice and beans. They do not receive any other wages or benefits like healthcare, etc.

labour rights from global buyers, who did not have concise private codes dictating core labour standards. One hotel and tour operator did mention, however, that some global/regional buyers made comments about whom they wanted to see in management positions or working directly with guests. One Ugandan hotel owner, who uncharacteristically had a Ugandan manager, said that a tour company owned by a 'Kenyan cowboy'³ had requested that they have a foreigner manager instead of a local.

Broadly, it was difficult to make general arguments about which firms were or were not likely to support social upgrading. Even those firms that had economically upgraded, and were considered to be more immune to the seasonality and risk issues embedded in the sector, made different social upgrading choices. Furthermore, there was diversity in the forms of social upgrading that were apparent. Wages may have increased relatively to earlier rates, and wages may have brought an income option which had not existed in the region before, but wages did not necessarily keep pace with inflation and the cost of living in tourism towns. Moreover, for smaller businesses, informal, non-contract arrangements dominate, and these are flexible and casual. Individuals are getting paid, but under precarious arrangements and connected to whether they have access to tourists.

Mostly, we found that firms took advantage of labour codes that segmented workers between permanent, contract and casual. All firms used multiple labour strategies, which correlated to stratified benefits, unless a firm on principle said they did not support casualization of work. Most tour operators had mainly permanent workers, except for a few casuals; but hotels in Mombasa, Maasai Mara and Murchison Falls all used various levels of casual workers. Again, there was no general correlation between the levels of casual workers used and whether there had been economic upgrading. In addition, the title of 'contract worker' is difficult to fully analyse, because contract employees may receive the same rights as permanent workers, but for a fixed amount of time, which can be six months to a year or two. Contracts may correlate to slow seasons, and when it is time to start a new contract, workers may have to start as casual workers first.

Importantly, we found that the presence and activity of a hospitality union supported social upgrading, at least for permanent workers at hotels. Kenya and Uganda have active trade unions working with hotel workers and hotel owners' associations. The Kenyan Union of Domestic, Hotel, Educational Institutions, Hospitals, and Allied Workers (KUDHEIHA) and the Uganda Hotels, Food and Tourism Allied Workers' Union (UHFTAWU) had collective bargaining agreements with the Hotel Owners' Associations for several years. UHFTAWU has had to negotiate individually with firms, due to a lack of standardized wage laws, and they have been successful in handling grievances with individual hotels and the Association. UFTAWU's presence is crucial, due to Uganda's weak labour code and the almost complete lack of enforcing and implementing mandates in the law. Both unions' focus on permanent workers, however, has left a hole for advocacy for labour rights for casual workers. In Kenya, particularly, more work needs to be done on increasing the role of women in the union and dealing with concerns over sexual harassment and giving women a voice.

Moreover, as with casual hotel workers, other groups of tourism workers have also lacked union representation due to their size and independent standing. Tourism guides are not covered by unions, but in many destinations, guide associations have arisen that have served to

³ The term 'Kenyan cowboy' is a stereotypical title used to describe white Kenyan ranchers/hunters who have made a name for themselves as guides and operators in the Kenyan safari business. Several respondents in Kenya discussed them, as did this proprietor in Uganda.

professionalize the sub-sector. Part of this professionalization is to standardize wage rates when they work as independent casual workers for tour companies. Often these rates are quite high, and the most experienced guides can demand more. Other associations – for example, community tourism groups – have also formed, but these are more concerned with marketing and increasing standards.

Public governance and economic and social upgrading

The role of the state, and the various policies and laws constructed to support tourism development (or not) had a strong impact on economic and social upgrading. From an economic upgrading perspective, how tourism was facilitated – through a combination of supporting foreign direct investment, marketing initiatives, and the designation of tourism sites like national parks and reserves –shaped which firms were able to benefit most. From a social upgrading perspective, workers' social rights and protection were greatly impacted by the way in which the labour code was constructed and enforced, and by how widely available training was made. Furthermore, other policies that are also interwoven with economic upgrading – such as how land access and title deeds are granted and connected to public and private land designations, and how they structure development – shape communities where tourism is growing and is one of the few economic activities.

First, the government in all of our cases has taken a weak role in regulating tourism development. Although tourism plans exist, and have existed for several years, there is a disconnection between plan and implementation, resources and realities, capabilities and manpower. Furthermore, the main function of most of these plans is to focus on marketing and increasing tourism numbers through highlighting the areas for growth, focusing less on managing growth. Moreover, the marketing initiatives also highlight the challenges faced particularly by developing countries, in that they cannot afford the level of publicity needed to lure hesitant global tourists to untried destinations. Out of our cases, Uganda was struggling to limit the image of Idi Amin and civil wars as representative of Uganda. But in 2010-11 it only had a budget of US\$300,000 for marketing, while other African destinations had millions. Although Kenya has been successful with marketing, it also struggles with image, as does most of Africa, and Kenya overemphasizes some tourism products and regions to the detriment of others.

Training is one of the critical areas where tourism plans are supposed to support the sector. Both countries have instituted levies to fund tourism training, but it has been more successful in Kenya, where Utalii College stands out as a haven for training in the region. Most schools focus on 'technical' tourism learning, rather than the soft-skill, experiential, informal standards that are expected of tourism providers (Christian et al. 2011). The dominance of Kenyan training has also entailed some drawbacks for regional competitors. In Uganda, where training is weaker and was articulated by all respondents as one of the most fundamental problems facing the sector, active recruiting from Kenya for higher-skilled positions and management was seen as a must, and some Ugandans felt that it was a barrier to their upward mobility options.

Second, one of the most important government policies shaping which groups were able to access production networks was how land policies were structured, including how development was pursued on different land classifications. In Uganda and Kenya there are challenges associated both with protecting land, but also with how protection gets circumvented to the benefit of some groups over others. In Uganda, there is a strong national park system, monitored by the Uganda

Wildlife Authority (UWA). The UWA has a 20 percent revenue-sharing agreement with the communities surrounding the park, but there are challenges over distribution and whether the amount given to communities has much poverty alleviation impact. There are also challenges concerning the politics of who is granted a concession, along with human–wildlife conflicts. How concessions are chosen and regulated, and the resources gained from concessions, are also contentious issues. In Murchison Falls National Park, there are eight private concessions. Concessionaires pay a fee, typically amounting to US\$5 per person per night, with exceptions made for size and price of products. There is much debate surrounding who is awarded concessions and, although tenders are made public, it is unclear how final decisions are made. High profile concessionaires such as the Marasa Group, who were one of the first concessionaires in the 1990s, were able to negotiate an exclusion zone for 30 years, which halted further tourism development and competition.

Kenya has been experimenting with some innovative ways to conserve and preserve wildlife through private conservancies that provide income to local communities, but the question of who has access to these models and the land development fees they generate is unanswered. Crucially, the lack of regulation of the development process inside and outside of national parks and reserves is also a long-term threat to tourism's sustainability. Kenya Wildlife Services, now part of the Ministry of Environment and Natural Resources, are responsible for management of national parks, but the national reserves are under the management of the Ministry of Local Governments, supervised via county councils. The Narok County Council and the Trans Mara Council play key roles in the development of the greater Maasai Mara area. In 1988, the Narok County Council began making payments of 19 percent of reserve gate receipts to eight group ranches immediately adjacent to the reserve. When the group ranches began to disband in the late 1990s, the Council channelled the fees to the 46 wards which were part of the former group ranches. With the subdivision process, however, deep socioeconomic divisions were solidified between different Maasai groups, the Maasai elite, and with the flock of 'landgrabbers' of non-Maasai, who were gaining title deeds around the Mara (Honey 2009). Until there is final passage of the Draft National Land Policy, there are going to be increased inconsistencies and inequalities perpetuated in the five different types of land-contracting models.

The growth of private conservancies that work in collaboration with communities is being touted as a positive development model. Around the Mara there are six private conservancies. Land is typically put into a collective unit, if not already part of a group ranch, and the company leases the area where accommodation will be constructed and pays bed-night and monthly fees that increase annually. These conservancies are managed by elite, national tour operators and camp groups – mostly all foreign or white Kenyan. Porini Camps, run by Gamewatchers, which manages the Olkinyei and Olare Orok Conservancies, was one of the pioneering firms to combine tourism firm growth with conservation and community development. While these conservancies are an innovative development model, more needs to be understood regarding fee distributions and longer sustainability issues in bringing Maasai and African Kenyans into management and ownership positions (Rutten 2007; Homewood et al. 2009).

With tourism planning and land structures, labour codes are a fundamental aspect of dictating social upgrading outcomes. In Kenya and Uganda, a multi-dimensional labour arrangement is classified, which designates between permanent, contract, casual and interim categories. Rights are highlighted broadly for permanent and contract workers, but it is typically left to private labour unions to enforce standards, since labour inspections and industrial courts are limited. In Uganda, although a new labour law was passed in 2006, there was no dissemination campaign to educate

firms and workers about the law and no effort to let people know the new law even existed. Uganda also has no Industrial Court, an institution where labour disputes are settled, despite the fact that it is required by labour law.

Discussion and conclusion

Our findings support the conclusion that when asking whether economic upgrading leads to social upgrading for workers and communities, the answer is that it depends on the category of worker, intersected with other identities, such as gender, race, and location (see Table 9). For example, hotel product upgrading has mostly led to social upgrading for permanent and contract workers, but not for casual employees. We discovered mixed findings if the workers were Maasai, women, or had hotels close to communities. Maasai mostly benefited, though women benefited less, and only a select group of Maasai close to camps. Moreover, the most successful hotels and camps were owned and managed by foreigners, ethnic elites and men. Regarding functional upgrading of tour operators, permanent and contract workers socially upgraded along with the Maasai, who went into leasing agreements with operators; but this pathway is typically excluded for women and only marginally available, and into segmented markets, for providers from communities. While chain upgrading for guides was positive, it excluded women. It was mixed for artisans. Maasai artists had outlets for their work, but it is unclear what level of income they were maintaining, once fees were paid to Manyattas and other intermediaries. Most other artisan groups in Mombasa and Murchison Falls had difficulty gaining distribution access.

The conditions that supported social upgrading, (or not), were varied. For the hospitality segment, an active hospitality trade union was paramount in advocating for worker rights and pursuing collective bargaining agreements, which guaranteed higher measurable standards for permanent and contract workers. The presence of a multi-tiered labour code with weak enforcement buttressed the use of casual labour by all firms, regardless of upgraded status. Also, from the public governance side, how tourism was planned (or not), the marketing and development funds available for sector growth, and the structure of land designations and development concession choices granted access to specific actors and put others in insecure positions. Largely, in the absence of any legal framework to force high labour standards, firms made social upgrading choices based on their own personal beliefs. There were several individual firms and brands that chose to pursue social upgrading outcomes for their workers voluntarily. These firms, nonetheless, were not abundant, and several still employed, even if in limited numbers, casual workers. Importantly, workers who were permanently employed at more traditional mass tourism upgraded hotels (the few examples in Mombasa) may be more likely to socially upgrade than if they were self-employed workers. Permanent workers at these hotels received higher wages and benefit opportunities, albeit many mass tourism hotels suffered from oversaturation and price pressures and subsequently hired many casual workers. Permanent workers at a few hotels in Murchison Falls National Park have done well compared to the communities in the area, who struggle to get connected to the GPN. The important distinction appears to be segment of the GPN, and not the broad tourism products per se, e. g. mass vs. community/ethnic. Hotel permanent workers tend to gain disproportionately over other sub-sector workers. As highlighted, this sub-sector is protected by trade union activity.

Table 6: Social upgrading outcomes based on workers’ characteristics

| | Perm. | Cont. | Casual | Maasai | Women | Communities |
|--------------------|--------------|--------------|---------------|---------------|--------------|--------------------|
| Hotel PU | + | + | - | o | o | o |
| Hotel PD | - | - | - | | - | |
| Tour Op. FU | + | + | - | o | o | o |
| Guide CU | | + | + | + | - | o |
| Artisan CU | | | | o | o | o |

PU=Product upgrade + upgraded
 PD=Product downgrade - downgraded
 FU=Functional upgrade o mixed findings
 CU=Chain upgrade

We also found some new trends emerging within our production networks that point to the growth of new national lead firms and the importance of new marketing platforms. In both cases, we were able to identify national and/or regional lead hotel brands and tour operators, mostly from Kenya, who are shaping the production network nationally and locally by being key links to global buyers, by deciding which local suppliers are used, and by developing their own labour strategies. The hotel groups Serena, Sarova and the Marasa Group are diversifying into other segments of the value chain, expanding into regional markets, and creating their own brand reputations. National tour operators, as well, are expanding and creating regional tour packages, and in some cases are being bought by large global tour companies. All of these firms are embracing new technological platforms and advancing them as the smaller competitors use them to enter the network. These firms also represent some of the best social upgrading indicators for workers. This may lead to more positive social upgrading results, but does not negate the need to counter the use of casual labour, which these hotels and operators use in varying forms.

Of all the economic and social upgrading patterns that we identify, divisions between women, ethnic groups, and benefit distribution to communities were prevalent. Women were summarily excluded from upgrading pathways, often (but not wholly) placed in gendered job categories, and had gendered constraints, which further limited their upgrading potential. Key ethnic and racial groups (whites, foreigners, Asian Africans) represent the capabilities that are expected to compete in the GPN. Indigenous African entrepreneurs are nevertheless slowly gaining from easier chain entry, but their firms cater to different tourist markets and struggle for survival and greater distribution access. Communities around national parks and remote destinations face extreme challenges in gaining from tourism to help mitigate the strain of chronic poverty. Around MFNP, almost all of the villages are gaining very little apart from the fees received from the park, which are quite limited. Community members are in survival mode every day, trying to gain access to food, water, healthcare and education for their children. Many are also losing their lives to park animals that do not heed park boundaries.

These findings serve as a platform to begin discussions about creating new, innovative programmes with private and public collaboration, in order to better distribute the gains to economic globalization's most marginalized actors.

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