

CAF SURVEY REPORT

“Promoting Access to Tourism Education and Human Capital Development in Africa”

EXECUTIVE SUMMARY: CONTINENTAL FOCUS & CROSS-BORDER BENCHMARKS

1. Purpose, Scope, and Mandate

This synthesis report evaluates the current state, systemic bottlenecks, and strategic innovations defining tourism education, technical vocational training (TVET), and human capital development across the Regional Commission for Africa (CAF). Grounded in evidence-based data and institutional responses collected from **34 UN Tourism Member States** from Africa, this document is compiled from extensive institutional survey inputs.

The primary objective is to equip the CAF member states with a unified, actionable policy document that addresses the continent's evolving hospitality labor markets. This framework is designed to directly support the *UN Tourism Agenda for Africa—Tourism for Inclusive Growth*, the *UN Tourism Education Guidelines (2022)*, and the *UN Tourism Education Toolkit (2023)* by highlighting two foundational pillars: expanding specialized training infrastructure and driving digital innovation and tech adoption.

From an implementation perspective, the report could also serve as the basis for a CAF Action Plan and a demand-driven pipeline of technical cooperation projects, allowing interested Member States to translate the survey findings into practical support on skills diagnostics, curriculum review, vocational training, trainer development, digital learning and workforce retention.

Crucially, it establishes a strategic roadmap for CAF Member States as the global community prepares for 2027, which the United Nations General Assembly has officially proclaimed as the International Year of Sustainable and Resilient Tourism. By focusing on expanding capacity-building systems and synchronizing regional curricula, this report ensures that African human capital is structurally positioned to meet these upcoming global benchmarks of sustainability and resilience.

2. High-Level Sub-Regional Trends

The structural maturity, regulatory architectures, and pedagogical directions of tourism education across Africa remain deeply influenced by distinct sub-regional policy configurations:

- **North Africa Cluster:** Demonstrates advanced institutional maturity characterized by centrally piloted state frameworks, predictive long-term human resource foresight (e.g., Tunisia's Horizon 2035), and spatial training integrations mapped directly to national development plans (e.g., Algeria's SDAT 2030).
- **West Africa Cluster:** Driven by an active regional transition toward the Competency-Based Approach (*Approche Par Compétence* - APC), national regulatory standardization enforced via legislative acts (e.g., the *NIHOTOUR Act 2022* in Nigeria), and the rise of alternative civil society networks to deliver localized field training in rural ecosystems.
- **Central Africa Cluster:** Characterized by a sweeping structural transition away from abstract academic-theoretical coursework toward formalized technical vocational tracking, university-

level orientation acts (e.g., Cameroon), and regional integration initiatives designed to standardize vocational qualification diplomas.

- **Eastern Africa Cluster:** Represents a high-density, highly coordinated training ecosystem utilizing advanced Competency-Based Education and Training (CBETA) frameworks, short-cycle curriculum reviews, and the establishment of regional Centers of Vocational Excellence supported by international development financing (e.g., Ethiopia's EASTRIP hub).
- **Southern Africa Cluster:** Anchored by mature, industry-integrated TVET systems funded through mandatory private sector levies (e.g., the *Skills Development Fund* model in Zambia and South Africa), comprehensive national qualification standard registers, and advanced models that embed local cultural assets and heritage preservation directly into the core academic curriculum (e.g., Zimbabwe's Heritage-Based Education 5.0).
- **Small Island Developing States (SIDS) Cluster:** Bound by distinct geographic and economic environments, this cluster focuses heavily on cultivating localized island masterplans (e.g., Cabo Verde), managing compulsory dual resort-apprenticeship placement platforms (e.g., Seychelles), and addressing severe structural deficits, including the complete absence of dedicated public hotel academies in smaller archipelagos (e.g., Comoros).

3. Core Synthesis of Macro-Trends & Actionable Priorities

Across the entire African continent, there is a powerful convergence around a shared transformation agenda: moving away from outdated, fragmented training systems toward employment-oriented, industry-driven tourism education ecosystems. To maximize the impact of this transition, the report outlines **four strategic continental imperatives** for CAF Member States:

- **Pedagogical Alignment:** Systematically implementing CBET/APC models to ensure that training outputs are built directly around validated, modern industry competencies.
- **Early Sensitization:** Integrating baseline tourism awareness, environmental conservation, and local heritage education directly into primary and secondary school curricula to reshape youth career perceptions from an early age.
- **Sustainable Financing:** Diversifying institutional funding models by shifting away from a total reliance on central state budgets or unpredictable external aid toward blended finance systems and mandatory private sector training levies.
- **Regional Harmonization:** Coordinating cross-border qualification standardizations and professional competency catalogs across regional economic blocks to support formal professional mobility and ensure the mutual recognition of skills across the continent.
- **Technical Cooperation Delivery:** Translating the survey findings into modular, demand-driven technical assistance packages, including tourism human resources needs assessments, competency-based curriculum reform, trainer-of-trainers programmes, mobile training delivery for remote destinations and support to sector skills councils.

Ultimately, these structural distinctions demonstrate that while a one-size-fits-all strategy is unfeasible, a synchronized and harmonized continental framework can bridge existing capability gaps. By leveraging these sub-regional **findings**, the CAF Commission can systematically transition national hospitality sectors from fragmented, theory-heavy curricula toward highly integrated, competency-based, and digitally enabled human capital ecosystems.

CHAPTER 1: CONTINENTAL CONTEXT, DEMOGRAPHIC MANDATE & OFFICIAL RESPONDENTS

1. The Socio-Economic & Structural Imperative

Across the African continent, tourism stands as an indispensable economic pillar with the potential to generate substantial employment opportunities for women, youth, and vulnerable groups. The travel and hospitality value chain encompasses a broad spectrum of interlinked sectors which offer the space to create and develop new business activities and entrepreneurial ventures in response to the evolving requests of the international market. However, while the tourism sector serves as a key contributor to the economic growth of Africa, severe demographic and gender inequalities persist:

- **The Youth Imperative:** Youth constitute a major force, representing 60% of the continent's total population under the age of 25. Yet, the rate of youth unemployment remains disproportionately high, with over 72 million young people out of work across the region.
- **The Gender Gap:** Despite the significant presence of women, who constitute 78% of Africa's tourism workforce, they remain predominantly employed in lower-skilled and lower-paid positions with highly limited representation at leadership and decision-making roles. This highlights considerable gender disparities in career advancement opportunities.

Bridging these skills gaps and facilitating equitable access to structured tourism education are therefore foundational to building a solid, resilient human capital base for the sustainable and inclusive growth of the sector across the African continent. These priority areas are fully aligned with the objectives and the recommendations encapsulated within the *UN Tourism Agenda for Africa – Tourism for Inclusive Growth*, the *UN Tourism Education Guidelines (2022)*, and the *UN Tourism Education Toolkit (2023)*.

2. Scope, Sub-Regional Configurations, and Institutional Accountability

This consolidated report evaluates the current state of tourism education, technical training, and public-private synergies across the Regional Commission for Africa (CAF). It integrates evidence-based data, insights, and institutional survey responses collected across African Member States. To ensure administrative granularity and clear policy benchmarking, the participating countries are organized into six distinct sub-regional clusters:

- **North Africa Cluster:** Centralized, state-piloted frameworks steered by long-term strategic master plans and high institutional maturity.
- **West Africa Cluster:** Focused on pedagogical re-alignment, regional transition toward the Competency-Based Approach (APC), national regulatory standardization, and alternative civil society professional networks.
- **Central Africa Cluster:** Driven by a transition from legacy academic-theoretical models toward technical streams, university-level orientation acts, and regional integrations.
- **Eastern Africa Cluster:** Characterized by high-density training networks, the integration of regional centers of vocational excellence, and advanced models for sector skills co-governance.
- **Southern Africa Cluster:** Focused on levy-funded training systems, national qualification standard registers, inclusive human resource frameworks, and heritage preservation models.

- **Small Island Developing States (SIDS) Cluster:** Exposed to distinct geographical realities, focusing on marine resilience, talent retention, localized island masterplans, and infrastructure development.

To verify empirical accountability and register the institutional foundations of this data, the following matrix serves as the official directory of responding delegates, line ministries, and state training organs:

OFFICIAL REGISTER OF SURVEY RESPONDENTS AND DELEGATED ENTITIES

COUNTRY	SUB-REGIONAL CLUSTER	ENTITY / ORGANIZATION
Algeria	North Africa	Ministry of Tourism and Handicrafts
Angola	Southern Africa	Ministry of Tourism
Botswana	Southern Africa	Ministry of Environment and Tourism
Burkina Faso	West Africa	General Directorate of Tourism (<i>DGT / MCCAT</i>)
Cabo Verde	SIDS Cluster	Ministry of Tourism and Transport
Cameroon	Central Africa	Ministry of Tourism and Leisure (<i>MINTOUL</i>)
Comoros	SIDS Cluster	Ministry of Environment in charge of Tourism
Congo Republic of	Central Africa	Ministry of Cultural, Tourism, Artistic Industry and Leisure
Côte d'Ivoire	West Africa	Ministry of Tourism and Leisure / African Network of Tourism Professionals (<i>RAPT</i>)
Democratic Republic of Congo	Central Africa	National Tourism Office (<i>ONT</i>) / Higher Pedagogical Institute of Gombe (<i>ISP-GOMBE</i>)
Ethiopia	Eastern Africa	Ministry of Tourism
The Gambia	West Africa	Gambia Tourism Board (<i>GTB</i>)
Ghana	West Africa	Ministry of Tourism, Culture and Creative Industries
Guinea Equatorial	Central Africa	Ministry of Tourism and Infrastructure
Kenya	Eastern Africa	Ministry of Tourism and Wildlife
Lesotho	Southern Africa	Ministry of Tourism, Sports, Arts and Culture
Malawi	Southern Africa	Ministry of Tourism
Mauritania	West Africa	National Tourism Office of Mauritania (<i>ONT</i>)
Mauritius	SIDS Cluster	Ministry of Tourism
Morocco	North Africa	Ministry of Tourism, Handicrafts and Social and Solidarity Economy
Namibia	Southern Africa	Ministry of Environment, Forestry and Tourism
Nigeria	West Africa	Federal Ministry of Art, Culture, Tourism and Creative Economy
Rwanda	Eastern Africa	Rwanda Development Board (<i>RDB</i>)
São Tomé and Príncipe	SIDS Cluster	Minister of Tourism
Senegal	West Africa	Ministry of Culture, Handicrafts and Tourism
Seychelles	SIDS Cluster	Ministry of Tourism and Culture / Ministry of Education and Human Resource Development
Sierra Leone	Western Africa	Ministry of Tourism and Cultural Affairs
South Africa	Southern Africa	Ministry of Tourism
Tanzania	Eastern Africa	Ministry of Natural Resources and Tourism
Togo	West Africa	Ministry of Tourism, Culture and Arts
Tunisia	North Africa	Tourism Sector Training Agency (<i>AFMT</i>)
Uganda	Eastern Africa	Ministry of Tourism, Wildlife and Antiquities
Zambia	Southern Africa	Zambia Institute for Tourism and Hospitality Studies (<i>ZITHS</i>)
Zimbabwe	Southern Africa	Ministry of Tourism and Hospitality Industry

3. Core Continental Vulnerabilities & Structural Challenges

Despite distinct geographic and administrative structures, Member States report facing three major structural challenges that impact the delivery of human capital programs:

- **Access Gaps:** Insufficient specialized tourism schools, uneven distribution of training facilities between urban and rural centers, and limited early-stage career exposure for primary and secondary students.
- **Quality Gaps:** Outdated academic curricula detached from market realities, weak practical or hands-on training (lack of physical simulator laboratories, training kitchens, and property management systems), and a critical shortage of qualified technical instructors.
- **Systemic Fragmentation:** Siloed institutional operations and a lack of formal coordination mechanisms linking Ministries of Tourism with the Ministries of Education, Higher Education, Labor, and private sector trade groups.

CHAPTER 2: STRATEGIC POLICY INSTRUMENTS & REGIONAL LEGISLATIVE FRAMEWORKS

1. Sub-Regional Policy Profiles

North Africa Cluster

- **Algeria:** Integrates its *SDAT 2030* (Tourism Master Plan) directly under its *SNAT 2030* (National Spatial Planning Scheme). This framework is reinforced by binding cross-ministerial conventions and the EU-partnered *Jil Siyaha* program to drive international certification benchmarking.
- **Morocco:** Operates structured annual training master plans managed through centralized ministry-piloted educational frameworks, balanced with luxury international service standards.
- **Tunisia:** Anchors human capital capacity building within the *National Strategy for Sustainable Tourism Development (Horizon 2035)*, utilizing predictive strategic foresight and sector diagnostics.

West Africa Cluster

- **Nigeria:** Legally institutionalizes national certification, training standards, and curricular standardization under the legislative mandate of the *NIHOTOUR Act 2022*.
- **Ghana:** Guides competitive workforce building through the *National Tourism Development Plan (2013–2027)*, paired with sweeping technical TVET reforms.
- **The Gambia:** Implements a multi-layered policy approach combining national qualification frameworks with the *World Bank Tourism Diversification and Resilience Project* to expand training access beyond the capital area.
- **Senegal:** Directs capacity building through its formalized *Sectoral Policy Letter for Tourism Development*, driving resources through the *ENFHT (National Hotel School)* and decentralized regional high schools.
- **Burkina Faso, Mauritania & Togo:** Focus policy instruments on local workforce formalization, professional licensing frameworks for tourist guides, and establishing regional reference blueprints to safeguard community hospitality positions.

- **Sierra Leone:** Rely on national tourism master planning initiatives to build baseline human capital post-crisis, shifting from uncoordinated NGO projects to state-managed registration.

Central Africa Cluster

- **Cameroon:** Deploys a comprehensive legislative framework anchored by three complementary laws: *Law No. 2016/006* (governing tourism and leisure), *Law No. 2018/010* (governing vocational training), and *Law No. 2023/007* (anchoring higher education orientation).
- **Democratic Republic of the Congo (DRC):** Focuses policy responses on restructuring administrative departments and translating higher academic programs into vocational alignments managed by the *National Tourism Office (ONT)*.
- **Republic of Congo:** Directs human capital development via the Ministry of Cultural, Tourism, Artistic Industry and Leisure, using targeted sector orientation laws to transition youth into leisure economies.
- **Guinea Equatorial:** ties its capacity building strategy under *Agenda 2035*, targeting diversification away from an oil-extractive economy by utilizing international cooperation frameworks like the *HOST-EG Erasmus+ project*.
- **São Tomé & Príncipe:** Focuses technical policy instruments on basic technical training and multilingualism to establish a foundational hospitality baseline.

Eastern Africa Cluster

- **Kenya:** Coordinates competitive workforce building via *Vision 2030*, the *National Tourism Strategy (NTS 2025–2030)*, and structured quality standards governed by the *Tourism Regulatory Authority (TRA)* and *TVETA*.
- **Rwanda:** Embeds human capital targets inside the *National Strategy for Transformation (NST2 2024–2029)*, managed operationally via the *Rwanda TVET Board (RTB)* framework and grading systems.
- **Ethiopia:** Steered by the *Sustainable Tourism Master Plan 2015–2025* and the *National TVET Strategy*, backed by the *East Africa Skills for Transformation and Regional Integration (EASTRIP)* project.
- **Uganda & Tanzania:** Have realigned national TVET policies to treat tourism as a priority industrial track, moving away from ad-hoc projects to systematic national accreditation systems and localized master plans.

Southern Africa Cluster

- **Angola:** frames its national human capital development strategic policies through the *CAPACITA TURISMO (2024–2027)* initiative, alongside the *National Development Plan 2023–2027*, *PLANATUR 2023–2027*, the *Angola 2050 Strategy*, and an overarching *Human Capital Plan 2022–2035*.
- **South Africa:** Guides inclusive HR development through its *White Paper (2024)*, the *Tourism Human Resources Development Strategy (THRDS)*, and the *Tourism Master Plan 2023*.

- **Botswana:** Operates the *National Human Resources Development Strategy (NHRDS) 2026-2035* alongside a dedicated *National Tourism Strategy and Masterplan* developed with UN Tourism.
- **Zambia, Zimbabwe, Malawi, Namibia, & Lesotho:** Focus policy instruments on standardized regional tracking, heritage-based national identities, and skills development levies to systematically fund public TVET upgrades.

Small Island Developing States (SIDS) Cluster

- **Seychelles:** Operates under the *National TVET Policy 2024–2028*, focusing heavily on improving sector attractiveness and expanding specialized maritime and luxury hospitality tracks.
- **Cabo Verde:** Links diversified training profiles (culture, gastronomy, adventure, and fishing tourism) directly into localized *Island Masterplans* (e.g., Fogo, Sal) supported by the *World Bank Human Capital Project (2022-2026)*.
- **Mauritius:** Relies on strong integration of tourism modules in secondary education to retain local talent within the island value chain through national human resource frameworks.
- **Comoros:** Anchored in the National Tourism Strategy and Government Action Plan to build resilient maritime/aviation interfaces, but severely constrained by a complete absence of formal hotel and restaurant classification regulations.

2. Comprehensive Master Matrix: Policy & Strategic Priorities

SUB-REGION	COUNTRY	PRIMARY STRATEGIC PRIORITY
North Africa	Algeria	Spatial training integration & quality standards
North Africa	Morocco	High-end luxury service alignment
North Africa	Tunisia	Predictive human capital foresight
West Africa	Nigeria	National training standardization
West Africa	Ghana	TVET structural integration
West Africa	The Gambia	Rural training access expansion
West Africa	Senegal	Regional decentralization of academies
West Africa	Burkina Faso	Local workforce formalization
West Africa	Togo	Professionalized service quality
West Africa	Mauritania	National heritage operationalization
West Africa	Sierra Leone	Base institutional manpower mapping
Central Africa	Cameroon	Multi-tier educational harmonization
Central Africa	Democratic Republic of the Congo	Transition to vocational tracking
Central Africa	Republic of Congo	Leisure economy youth integration
Central Africa	Guinea Equatorial	Diversification from oil-extractive base
Central Africa	São Tomé & Príncipe	Baseline vocational framework building
Eastern Africa	Kenya	Regulatory standard-setting
Eastern Africa	Rwanda	Language & global service alignment
Eastern Africa	Ethiopia	Center of Excellence capacity building
Eastern Africa	Uganda	Expanded practical student exposure
Eastern Africa	Tanzania	Service quality & wildlife integration
Southern Africa	Angola	Institutional skill capacity building
Southern Africa	South Africa	Inclusive growth & safety integration
Southern Africa	Botswana	Graduate absorption into luxury markets
Southern Africa	Zambia	Standardized regional tracking
Southern Africa	Zimbabwe	Heritage-based local identity alignment
Southern Africa	Malawi	Sector professionalization & quality
Southern Africa	Namibia	Youth innovation & community inclusion

Southern Africa	Lesotho	Grassroots TVET infrastructure scaling
SIDS Cluster	Seychelles	Elevating vocational sector appeal
SIDS Cluster	Cabo Verde	Diversified territorial profiles
SIDS Cluster	Mauritius	Talent retention & industry alignment
SIDS Cluster	Comoros	Community capacity building

CHAPTER 3: CURRICULUM MODERNIZATION, QUALITY ASSURANCE & COMPETENCY ALIGNMENT

1. Progressive Transition to Competency-Based Models (CBET / APC)

The definitive pedagogical vector across the African continent is the structural shift away from legacy abstract-theoretical coursework toward the introduction of Competency-Based Education and Training (CBET / *Approche Par Compétence* - APC). This model builds educational outputs directly around evaluated industry competencies, workplace attachments, graduate tracer tracking, and formalized private sector engagement.

- **North & West Africa (APC Mandates):** **Morocco** and **Senegal** have systematically institutionalized the APC methodology across all public training networks. **Togo** links its curricular content directly to practical enterprise metrics, adapting course modules to favor kitchen production, room division mechanics, and modern digital ticketing agency workflows.
- **Central Africa Technical Frameworks:** **Cameroon** utilizes an integrated qualification track backed by distinct legislative orientation acts. This setup bridges three educational tiers: secondary technical diplomas, the *Diploma of Vocational Qualification (DQP)*, and the *Certificate of Vocational Qualification (CQP)* at centers of vocational excellence, extending up to Professional Bachelor's and Master's degrees at the state university level. To ensure curriculum responsiveness, state university tracks undergo a *systematic biennial update*, reducing long-term skill mismatches.
- **Eastern Africa (CBETA Systems):** **Kenya** leads structured regional implementation via the *TVETA CBETA* matrix, aligning course metrics with the operational needs of trade associations like the *Kenya Hotel Keepers Association*. **Rwanda** leverages continuous skills gap analysis to drive modular adjustments via the *Rwanda TVET Board (RTB)*. **Ethiopia** utilizes competency-based TVET certificates supported by continuous graduate tracer studies and direct employer feedback loops to verify workforce readiness. **Tanzania** and **Uganda** have structurally integrated compulsory, multi-month practical placements into their formal evaluation criteria.
- **Southern Africa (Levy & Heritage Blueprints):** **Zambia** enforces rigorous standardized tracks governed by *TEVETA* and *ZAQA* guidelines, shifting away from generic certificates to technical paths in green hospitality and ecotourism. **South Africa** coordinates quality-controlled competency streams using *CATHSSETA* and *QCTO* criteria. **Zimbabwe** stands out with its **Heritage-Based Education 5.0** model, which structurally integrates local cultural preservation, indigenous assets, natural ecosystems, and community innovation into the technical examination framework. Advanced competency-based paths are similarly deployed in **Botswana**, **Namibia**, and **Malawi**.

2. Early Sensitization & Career Awareness Frameworks

To alter the negative socio-economic perception of tourism as a low-tier employment track and reposition it as an aspirational, long-term professional field for youth, several member states deploy early-stage exposure models:

- **The Gambia:** Runs a highly successful, flagship national initiative called "**Catching Them Young**", which legally embeds baseline tourism awareness, historical guiding, and fundamental hospitality concepts directly into the primary and secondary school curricula.
- **School Tourism Clubs & Youth Expos:** **Seychelles, Lesotho, Mauritius, and South Africa** utilize active, state-funded school tourism clubs, national youth innovation summits, and localized career expos to build interest in environmental conservation, marine biology, and heritage tourism from an early age.
- **Alternative Grassroots Field Tracks:** **Côte d'Ivoire** uses the civil society *RAPT Network* to deliver field-based training via "*Bourses du Tourisme*" (Tourism Exchanges) and "*Circuits Paysans*" (rural farmer paths). These alternative networks train rural youth directly on-site in eco-museum management, community-lodge operations, and local cultural mediation, bypassing institutional classroom barriers.

3. National Certification & Quality Assurance (QA) Architectures

The validity of certifications and the mutual recognition of qualifications across borders relies on independent national quality control bodies:

- **Multi-Layered Regulatory Environments:** **Kenya** enforces a rigorous QA architecture connecting the *Technical and Vocational Education and Training Authority (TVETA)*, the *Tourism Regulatory Authority (TRA)*, and the *Commission for University Education (CUE)*.
- **Integrated Accreditation Bodies:** **South Africa** regulates qualification standards via three distinct entities: *Umalusi* (for general and further education), the *Council on Higher Education (CHE)*, and the *Quality Council for Trades and Occupations (QCTO)*, under the *CATHSSETA* framework.
- **Legally Codified National Acts:** **Nigeria** has legally codified national training and certification standardizations under the legislative mandate of the *NIHOTOUR Act 2022*. Similarly, **Zambia** pairs *TEVETA* with the *Zambia Qualifications Authority (ZAQA)* register. **The Gambia** utilizes its *National Quality Control and Accreditation Agency*, and **Rwanda** enforces a nationwide grading and licensing framework managed directly by the *Rwanda Development Board (RDB)*.

CHAPTER 4: TVET INFRASTRUCTURE, DIGITAL INNOVATION & LABOR INTERFACES

1. Matchmaking Systems & Industrial Linkage Interfaces

Transitioning graduates smoothly from the classroom into active employment requires functional matchmaking systems, online portals, and apprenticeship frameworks:

- **South Africa:** Deploys large-scale youth integration through its institutionalized **Earn and Learn Placement Programme** and structured *Learnerships* funded via the sector training authority.

- **Seychelles:** Enforces a compulsory dual education-apprenticeship system through the *Seychelles Tourism Academy (STA)*, embedding students for structured periods inside international resort clusters.
- **Kenya:** Operates digital **Workforce Registries**, dedicated online career portals, and the specialized *TourEdu4All* platform to connect certified trainees with verified private employers.
- **Democratic Republic of the Congo (DRC):** Employs an *Interface Matching Model*, where the state-run *National Tourism Office (ONT)* acts as a centralized clearinghouse connecting university higher tourism departments (e.g., Kisangani, Lubumbashi) and *INPP* vocational tracks directly to hotels.

2. Innovation and Technology Integration

The cross-border deployment of digital competencies is expanding beyond basic office software into targeted training in automation, property management systems, digital marketing, and artificial intelligence:

- **Algeria:** Combines inter-ministerial conventions with private digital startup incubators to drive rapid tech adoption and e-tourism platforms among young hospitality operators.
- **Guinea Equatorial:** Partners internationally via the *HOST-EG Erasmus+ project*, establishing advanced digital learning partnerships and online tourism training platforms to build capacity outside the traditional oil-extractive economy.
- **Cameroon:** Implements a multi-pronged digital framework driven by the *MINTOUL* computer cell, which includes executing internal *e-tourism* seminars for staff, running advanced capacity-building programs on the **use of artificial intelligence in tourism promotion** in direct coordination with the South Korean cooperation agency (*KOICA*), and integrating professional digital content creators to democratize online learning.

3. Mapping of Infrastructure & Technology Readiness

SUB-REGION	COUNTRY	CORE INSTITUTIONAL FOOTPRINT / PHYSICAL TRAINING INFRASTRUCTURE	LEVEL OF DIGITAL / AI / TECH INTEGRATION
North Africa	Morocco	4 premium centers (<i>ISITT Tangier</i> , 3 specialized <i>ISTAHT</i> institutes)	Medium: Centralized booking/CRS training
North Africa	Algeria	Network of regional tourism and hotel institutes	High: Inter-ministerial startup incubator compacts
North Africa	Tunisia	Specialized hotel schools managed under <i>AFMT</i> oversight	Medium: Property Management Systems integration
West Africa	Nigeria	<i>NIHOTOUR</i> campuses across geopolitical zones	Medium: Digital hospitality management modules
West Africa	Ghana	Centralized <i>HOTCATT</i> institute training tracks	Low: Emerging e-tourism curriculum updates
West Africa	The Gambia	Modernized <i>Gambia Tourism Hospitality Institute (GTHI)</i>	Medium: Standard computerized reservation tracking
West Africa	Senegal	<i>ENFHT (National Hotel School)</i> and regional high schools	Low: Basic digital ticketing applications
West Africa	Togo	National vocational training centers and workshops	Low: Practical front-desk simulator software

West Africa	Mauritania	Baseline tourism and guiding training tracks	Low: Fundamental digital communication tools
West Africa	Burkina Faso	Vocational training centers under the DGT	Low: Standard ticketing and administrative software
West Africa	Sierra Leone	Nascent hospitality vocational training tracks	Low: Basic digital literacy integration
Central Africa	Cameroon	5 State Universities, several Private Institutes, technical high schools	High: KOICA-backed AI tourism seminars
Central Africa	Democratic Republic of the Congo	National university tracks / INPP vocational facilities	Low: Basic administrative computer applications
Central Africa	Republic of Congo	Early-stage vocational training facilities	Low: Fundamental booking system training
Central Africa	Guinea Equatorial	Technical training networks / International partnerships	Medium: HOST-EG online learning platform
Central Africa	São Tomé & Príncipe	Emerging technical school training footprint	Low: Basic front-office software tracking
Eastern Africa	Kenya	Kenya Utalii College / Industry-linked universities	High: Digital Workforce Registries & portals
Eastern Africa	Rwanda	Comprehensive TVET school network (RTB overseen)	High: Advanced ICT & multi-lingual e-learning
Eastern Africa	Ethiopia	Tourism Training Institute (TTI) / EASTRIP Regional Center	Medium: Virtual simulation & practical tech labs
Eastern Africa	Uganda	Public and private universities / Placement facilities	Low: Baseline practical training software
Eastern Africa	Tanzania	Specialized colleges / Wildlife management institutes	Medium: Wildlife tracking and hospitality tech
Southern Africa	South Africa	Public TVET colleges and private academies network	High: Advanced safety tech & placement tracking
Southern Africa	Angola	EHTA (Hotel & Tourism School) and decentralized centers	Medium: Planned digital upskilling programs
Southern Africa	Botswana	Public/private tertiary providers and international resort setups	Medium: Hospitality automation software modules
Southern Africa	Zambia	ZITHS campuses and technical colleges	Medium: Modernized digital e-library networks
Southern Africa	Zimbabwe	University departments / <i>Heritage-Based Education</i> labs	High: Tourism Satellite Account (TSA) system training
Southern Africa	Malawi	Licensing and certified private/public training facilities	Low: Emerging e-hospitality modules
Southern Africa	Namibia	Vocational training centers / Youth innovation labs	High: Youth innovation summit digital tracks
Southern Africa	Lesotho	Developing vocational training centers	Low: Basic reservation system software
SIDS Cluster	Seychelles	Seychelles Tourism Academy (STA) campus with resort links	High: Compulsory resort tech placement systems
SIDS Cluster	Cabo Verde	Technical training centers linked to resort properties	Medium: Online distance-learning platform expansion
SIDS Cluster	Mauritius	Comprehensive training centers and secondary systems	Advanced corporate PMS and simulator systems
SIDS Cluster	Comoros	<i>Total absence of a dedicated public national hotel school</i>	Low: Fundamental digital connectivity training

CHAPTER 5: TYPOLOGIES OF PUBLIC-PRIVATE PARTNERSHIPS (PPP) GOVERNANCE

Data across both reports demonstrates that Public-Private Partnerships have evolved beyond basic student internships into formal co-governance models. Private sector entities are shifting from passive recruiters into active co-designers and co-validators of tourism skills systems. Continental PPP structures can be classified into four primary typologies:

1. Board-Level Co-Governance Style

In this model, private sector enterprises and hospitality associations sit directly on the active management and administrative boards of public training institutes, enjoying shared decision-making power over strategic development.

- **Morocco:** Private sector operators sit directly on the governing boards of the specialized *ISTAHT* and *ISITT* centers to shape operational tracks.
- **Rwanda:** Operates the landmark *Sector Skills Council model* via the **Rwanda Tourism and Hospitality Sector Skills Council (RTSSC)**. The council conducts direct skills gap analyses, reviews national occupational standards, and drives private investments into TVET frameworks.
- **Ethiopia:** Integrates formal industry advisory boards and continuous employer feedback loops directly into the administration of the *EASTRIP-supported Tourism Training Institute*.

2. Contractual Sectoral Agreements

This style relies on formalized, institutionalized agreements with corporate actors, third-party technical experts, and international bilateral development agencies to fund diagnostics, implement staff training, and execute specialized studies.

- **Cameroon:** Maintains active, strategic contracts with corporate actors and external partners, including **DIAGEO** (private funding for continuous professional training), **Polygone SARL** (for third-party skill assessment diagnostics), and the specialized cabinet **MINERVE**.
- **Ghana:** Leverages strong PPP-driven curriculum updating cycles, job fairs, and structured apprenticeships directly integrated with hotel groups and private operators.

3. Co-Investment & Blended Funding Systems

This model blends central state allocations, international development grants, and private equity investments to create decentralized territorial networks, often funded by sector-specific tax models.

- **Tunisia:** Leverages a shared territorial, multi-tier setup that blends public administrative funds, international development capital, and private finance managed via the *AFMT* body. This framework separates state quality oversight from flexible, private field tracks.
- **South Africa:** Utilizes concession-based PPP frameworks and structures training initiatives through funding from specialized sectoral levies.
- **Zambia:** Sustains standardized training expansions by utilizing its dedicated **Skills Development Fund Levy**, which taxes private operators to directly co-fund public TVET standard improvements.

4. Local Cooperatives & Grassroots Associative Networks

This model focuses on alliances between civil society networks, municipal management boards, local environmental groups, and rural cooperatives to formalize grassroots economic tracks.

- **Côte d'Ivoire:** Links civil society networks directly with municipal boards via the *RAPT Network* to manage localized "*Éco-villages Touristiques*"—combining open-air theaters, eco-museums, and regional accommodations to protect community-driven economic equity.

CHAPTER 6: COMPARATIVE SUB-REGIONAL REALITIES MATRIX

The evaluative matrix below provides a systematic look at core structural elements across the continent, highlighting the independent technical tracks of Eastern Africa and Southern Africa:

Evaluation Metric	North & West Africa Clusters	Central Africa & SIDS Clusters	Eastern Africa Sub-Region Cluster	Southern Africa Sub-Region Cluster
Primary Regulatory Architecture	Centrally managed by state bodies and line ministries (AFMT, INFHT).	Mixed ministerial oversight; SIDS completely lacks public hospitality schools.	Coordinated via distinct sectoral authorities (TVETA, TRA, RTB, RDB).	Coordinated via consolidated qualifications authorities and broad training boards (CATHSSETA, ZAQA, QCTO).
Dominant Curriculum Vector	Strict institutional APC paired with digital reputation modules.	Transitioning to LMD systems; SIDS focuses on basic desert/island guiding blueprints.	Strict application of CBETA models with short-cycle reviews and regional Centers of Excellence.	<i>Heritage-Based Education 5.0</i> , National Professional Catalogs, and service-excellence updates.
Primary Funding Mechanism	Blended state-private funds and international development support.	Heavily dependent on state budgets and targeted corporate PPP contracts (DIAGEO).	Revolving funds, international development grants (EASTRIP), and state allocations.	Mandatory private sector levies (Skills Development Fund), concession-based PPP requirements, and blended finances.
Labor Linkage Platforms	State-private placements and decentralized cooperative networks.	State ONT clears graduate matching; SIDS uses flexible administrative cooperatives.	Tech-driven <i>Workforce Registries</i> , <i>TourEdu4All</i> platforms, and Sector Skills Councils.	Formal Earn & Learn Placement Programmes , industrial learnerships, and national employment portals.
Core Structural Vulnerability	Bureaucratic inertia and rigid centralized systems.	Severe shortage of PhD professors; absolute lack of physical lab infrastructure in SIDS.	Language barriers, localized infrastructure access gaps, and uneven digital integration.	High rates of sectoral brain drain, unequal rural training access, and project-based PPP fragmentation.

CHAPTER 7: SYSTEMIC CONSTRAINTS & STRUCTURAL BOTTLENECKS

1. Inter-Ministerial Coordination Silos & Administrative Gaps

One of the largest obstacles to human capital development is the presence of administrative silos and fragmented institutional collaboration between tourism authorities and other state arms. For example, the **DRC** and **Sierra Leone** suffer from a severe structural detachment between their Ministry of Tourism and higher education networks.

While countries like **Cameroon** actively address this risk through binding inter-ministerial conventions (such as executing a formal pact between *MINTOUL* and the Ministry of Higher Education to support the *Higher School of Urban Planning and Tourism - ESSUT* at the University of Bertoua), bureaucratic timelines slow down execution. Key conventions—specifically those with the University of Ebolowa and the *Higher Technical Teachers' Training College (ENSET)*—remain listed as "in progress," demonstrating how administrative friction impacts policy delivery.

2. Labor Force Retention & Continental Brain Drain

The drain of qualified talent out of the domestic tourism market due to difficult sectoral conditions (unpredictable seasonal working hours, depressed entry wage scales) is a shared vulnerability from Tunisia to South Africa. This systemic retention failure is driven by low sector attractiveness, limited clear career progression horizons, and the migration of skilled professionals to other economic sectors or international markets.

To structurally address this risk, governments are forced to bring in specialized external expertise. For example, the Cameroonian government explicitly commissioned the specialized cabinet **MINERVE** to design dedicated frameworks for cultivating, attracting, and ensuring the *retention of talent* across the domestic tourism ecosystem, acknowledging that generating graduates is ineffective if the local industry cannot retain them.

3. Geographical Dispersion and Urban-Rural Disparities

Significant capacity, institutional, and infrastructure disparities persist between urban administrative hubs and rural tourism destinations. While capital cities host well-equipped academies, the rural areas where eco-lodges, national parks, and cultural heritage assets are physically located suffer from an acute absence of training infrastructure. This leaves informal, small-scale local operators, women, and youth disconnected from structured training and professional growth paths. Furthermore, university systems in Central Africa (such as the DRC) have transitioned toward the standardized *LMD* model but face a severe structural shortage of qualified *PhD Professors* specializing in tourism fields, leaving the entire educational pipeline reliant on generalist instructors without deep sector experience.

CHAPTER 8: ACTIONABLE STRATEGIC RECOMMENDATIONS FOR CAF MEMBER STATES

1. Integrate End-to-End Tourism Education Pathways

Member States must structurally strengthen end-to-end tourism education pathways by integrating tourism education progressively from primary and secondary school through TVET and tertiary education. Modeling frameworks after **The Gambia's** "*Catching Them Young*" initiative and the school tourism clubs of **Seychelles** will ensure early exposure, structured progression, and clearer career pathways across all sub-sectors of the value chain.

2. Institutionalize Bi-Annual Skills Audits & Tracer Studies

To minimize skills mismatches and better anticipate labor market demand, Member States should establish permanent employment monitoring and tracking systems. Line ministries should structurally avoid static, outdated training plans by systematically auditing domestic tourism skill requirements every two years, sharing the financial and technical burden of these independent diagnostics with private corporate groups and hotel associations.

3. Diversify Sustainable Blended Financing Mechanisms

Governments must transition training systems away from an absolute dependency on centralized state funding or unpredictable international technical aid. Member States should look to replicate the **Zambian** and **South African** models by setting up dedicated *Skills Development Fund levies* or blended finance approaches that combine public resources, tourism levies, external partner support, concessional financing, and private equity investments to improve long-term scalability.

4. Adopt Continental Certification Harmonization Mechanisms

The CAF Commission should actively design and implement cross-border qualification harmonization mechanisms and professional competency standards. Standardizing professional tourism qualification catalogs across regional economic blocks will dramatically enhance the mutual recognition of skills, improve formal professional mobility, and support seamless knowledge transfer and comparability of qualifications across borders.

5. Translate the Survey Findings into a CAF Action Plan and Technical Cooperation Pipeline

Following the CAF discussion, UN Tourism could invite interested Member States to request targeted technical cooperation support based on the survey findings. This support could be organized around modular assistance packages that can be adapted to national contexts and available resources.

Possible technical assistance packages include national tourism skills audits and human resources needs assessments; competency-based curriculum review; establishment or strengthening of tourism sector skills councils; vocational training and trainer-of-trainers programmes; digital learning and employment platforms; mobile training units for remote destinations; and workforce retention strategies.

A concise action matrix could identify lead institutions, potential partners, expected outputs, indicative timeframes and resource requirements, thereby turning the survey findings into an operational roadmap for implementation.

CHAPTER 9: THEMATIC RECOMMENDATIONS FOR CAF MEMBER STATES

To bridge the critical gaps in access, quality, and systemic fragmentation across the African continent, Member States must transition from fragmented, project-based interventions to systemic, legally backed structural overhauls. The following detailed, multi-dimensional recommendations provide an operational roadmap directly informed by verified country configurations:

1. Curricular Modernization & Pedagogical Overhauls

- Universal Enactment of Competency-Based Education (CBET / APC): Member States must systematically phase out legacy, purely theoretical academic curricula. Following the successful legislative models of Morocco and Senegal, which have institutionalized the *Approche Par Compétence* (APC) nationwide, training institutions must build educational outputs directly around evaluated industry competencies. As demonstrated by Togo, course modules must be aggressively re-aligned to focus on technical hospitality tracks—specifically kitchen production, room division mechanics, and modern digital ticketing workflows—rather than broad general business management.

- Mandatory Practical Placements & Infrastructure Standardization: Member States should look to the policies of Tanzania and Uganda, which have legally integrated compulsory, multi-month practical field placements as a prerequisite for graduation. Educational funding must prioritize physical simulator laboratories, commercial training kitchens, and Property Management Systems (PMS). No vocational diploma or degree should be awarded without a formalized logbook evaluation system co-signed by an accredited private employer.
- Institutionalize Continuous Curriculum Updating Cycles: To permanently eliminate long-term skill mismatches, Member States should adopt the Cameroonian model, where state university tracks undergo a *systematic biennial update* managed directly by institutional boards. This must be paired with continuous graduate tracer studies and direct employer feedback loops—as utilized in Ethiopia—to evaluate school-to-work transition timelines and dynamically adjust training capacities.
- Preserve Local Cultural Assets via Heritage-Based Models: Rather than copy-pasting Western service blueprints, Member States should replicate Zimbabwe's Heritage-Based Education 5.0 framework. This model structurally integrates local cultural preservation, indigenous culinary assets, regional history, and community innovation into the national technical examination framework, transforming heritage assets into distinct drivers of sustainable high-end tourism.

2. Strategic Institutional Access & Early Sensitization

- Nationalize Early-Stage Tourism Curricula: To reshape the negative socio-economic perception of tourism as a low-tier employment track and present it as an aspirational, long-term professional field, Member States should replicate The Gambia's flagship "Catching Them Young" initiative. This legally embeds baseline tourism awareness, historical guiding, and fundamental hospitality concepts directly into the primary and secondary school curricula.
- Deploy Active School Tourism Clubs and Youth Expos: Line ministries should fund decentralized, youth-oriented recruitment networks. Replicating the successful programs of Seychelles, Lesotho, Mauritius, and South Africa, states should manage permanent school tourism clubs, national youth innovation summits, and localized career expos to build early-stage interest in environmental conservation, marine biology, and heritage management.
- Decentralize Technical Infrastructure via Grassroots Pathways: To correct the stark urban-rural disparities where capital cities host well-equipped academies while rural asset zones lack training infrastructure, Member States should adapt the alternative models deployed in Côte d'Ivoire. By leveraging civil society networks like the *RAPT Network*, states can establish field-based training via "*Bourses du Tourisme*" (Tourism Exchanges) and "*Circuits Paysans*" (rural farmer paths), training rural youth directly on-site in eco-museum management, community-lodge operations, and local cultural mediation.

3. Sustainable and Diversified Financing Mechanisms

- Legislate Mandatory Private Sector Training Levies: To move away from a volatile reliance on central state budgets or unpredictable international technical aid, Member States should enact statutory legislation creating a dedicated, self-sustaining training fund. Following the mature models of Zambia (via its *Skills Development Fund*) and South Africa (via the *CATHSSETA* framework), governments should levy a nominal percentage on private operator revenues. These funds must be strictly ring-fenced to finance public TVET infrastructure upgrades, continuous technical instructor upskilling, and student stipends.

- Deploy Concession-Based PPPs and Multi-Tier Financial Blending: Following the co-investment frameworks of Tunisia's Tourism Sector Training Agency (AFMT), states should establish shared territorial setups that blend public administrative funds, international development capital, and private finance. Furthermore, like South Africa's concession-based PPP frameworks, private operators managing luxury hospitality assets within public domains or national parks must be contractually obligated to co-invest a portion of their returns into local community training facilities and local workforce development.
- Leverage International Development Projects for Regional Scale: Developing states should actively align their human capital strategies with large-scale multilateral funding instruments. Examples include utilizing The Gambia's and Cabo Verde's approach of linking training access expansion directly into *World Bank Human Capital and Resilience Projects*, or Ethiopia's strategy of anchoring center-of-excellence upgrades within the *East Africa Skills for Transformation and Regional Integration (EASTRIP)* project.

4. Digital Innovation, Tech Adoption & AI Competency

- Integrate AI and Advanced Automation into Core Hospitality Training: Beyond basic administrative or office software, public hospitality academies must modernize their digital training portfolios. Curricula should explicitly include practical instruction in artificial intelligence applications for predictive tourism marketing, automated property management tracking, digital guest relation systems, and global distribution system (GDS) synchronization. Replicating Cameroon's multi-pronged digital framework, line ministries should form partnerships with international cooperation agencies (e.g., South Korea's KOICA) to run specialized capacity-building seminars on the use of AI in tourism promotion and content creation.
- Establish Cross-Ministerial Startup Compacts: Replicating Algeria's strategic model, Ministries of Tourism should partner with Ministries of Digital Innovation and private technology sectors to implement binding conventions and fund *e-tourism startup incubators*. This framework must empower young tourism graduates to design localized digital booking platforms, virtual guiding applications, and e-hospitality solutions tailored to their domestic markets.
- Build Advanced E-Learning and Online Training Platforms: To democratize learning and build capacities across geographically isolated regions or island archipelagos, Member States should replicate Guinea Equatorial's strategic use of international cooperation frameworks (such as the *HOST-EG Erasmus+ project*) to launch centralized online tourism training platforms, ensuring technical training continuity outside traditional classroom environments.

5. Inter-Ministerial Coordination & Governance Reforms

- Enact Binding Joint Ministerial Pacts: To permanently dissolve institutional silos and administrative friction—such as the severe separation between tourism authorities and higher education networks seen in countries like the DRC and Sierra Leone—Member States must establish formal, binding conventions. Replicating Cameroon's structural convention strategy (such as the formal pact between MINTOUL and the Ministry of Higher Education supporting the *Higher School of Urban Planning and Tourism - ESSUT* at the University of Bertoua), these legislative instruments must govern the shared operational and pedagogical oversight of state training academies, ensuring university expansions align directly with national workforce planning.
- Establish Statutory Sector Skills Councils (SSCs): Private sector trade associations must be given legal, board-level co-governance authority over public training institutions, shifting their

role from passive recruiters to active co-designers of the educational system. Following Rwanda's landmark Tourism and Hospitality Sector Skills Council (RTSSC) model, these councils must possess a statutory mandate to lead nationwide skills audits, continuously review national occupational standards, and co-validate technical examination frameworks.

- Formally Address the Labor Retention Crisis: To combat the severe brain drain of qualified talent out of the domestic hospitality market due to difficult sectoral conditions (unpredictable seasonal working hours, depressed entry wage scales), Member States could follow the Cameroonian strategy of explicitly commissioning specialized external expertise (such as the specialized cabinet *MINERVE*) to design dedicated frameworks for cultivating, attracting, and ensuring the *retention of talent* across the domestic tourism ecosystem.
- Resolve the Structural Shortage of Specialized Trainers: University systems transitioning toward standardized *LMD* models—particularly in Central Africa—must address the acute shortage of qualified *PhD Professors* specializing in tourism fields. Line ministries should establish fast-track scholarship funds to transition experienced industry professionals into advanced postgraduate academic tracks, preventing the entire educational pipeline from relying on generalist instructors without deep sector experience.

6. Continental Harmonization & Professional Mobility

- Develop National and Regional Qualification Reference Frameworks: To ensure the validity of certifications and the mutual recognition of qualifications across borders, Member States are encouraged to establish robust independent quality control bodies. Replicating the multi-layered regulatory architectures of Kenya (connecting *TVETA*, the *Tourism Regulatory Authority*, and the *Commission for University Education*) and South Africa (connecting *CATHSSETA*, *ZAQA*, and *QCTO*), qualification standards must be legally codified under national acts (such as the *NIHOTOUR Act 2022* in Nigeria).
- Harmonize Competency Catalogs Across Regional Blocks: The CAF Commission should actively coordinate the cross-border standardization of professional tourism qualification catalogs across regional economic blocks (e.g., ECOWAS, SADC, EAC, CEMAC). Standardizing skill definitions, credits, and competencies will facilitate the mutual recognition of diplomas across national borders, support formal professional mobility, and ensure seamless knowledge transfer and comparability of qualifications across the entire continent.
- Launch Pan-African Trainer Exchange Programs: High-density regional centers of excellence (such as Ethiopia's *EASTRIP* hub or Kenya's *Utalii College*) should establish collaborative exchange frameworks to deploy master trainers to support institution-building in developing hospitality ecosystems, expanding peer-to-peer knowledge transfers.
- Standardize Basic Legal Classifications for SIDS: Smaller island archipelagos experiencing extreme infrastructure gaps—such as the Comoros, which completely lacks a dedicated public national hotel school and relies solely on general tourism tracks at the *University Institute of Technology*—must prioritize enacting foundational hotel and restaurant classification regulations. Establishing these baseline legal standards is an absolute prerequisite before structured competency reference blueprints (*référentiels aux métiers*) can effectively transform informal island guiding into protected, certified local jobs.

Annex I. – References to UN Tourism Publications

- [UN Tourism Publication on "*Innovating Undergraduate and Graduate Programmes - a Multidisciplinary Approach*" \(2025\)](#)
- [UN Tourism Education Toolkit \(2023\)](#)
- [UN Tourism Education Guidelines \(2022\)](#)