



PRIORITY SECTOR INVESTMENT REPORT

**INVESTMENT OPPORTUNITIES
IN THE SOMALIA TOURISM AND
HOSPITALITY SECTOR**



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May 2023

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Minister's Foreword – MoPIED

I am pleased to present the “Priority Sector Investment Report: Investment Opportunities in the Somalia Tourism and Hospitality Sector”, the first of its kind in Somalia since 1980s. The study has been commissioned and led by the Investment Promotion Office (SOMINVEST) at the Ministry of Planning, Investment and Economic Development (MoPIED).

The study aims to shed light on the abundant investment opportunities and challenges in the realm of the Tourism and Hospitality Sector in Somalia.

Tourism industry is a significant contributor to the socio-economic development of the new Somalia as it is in many economies in the region. The tourism sector is one of the key economic drivers in our region and has been instrumental in creating massive job opportunities as it lubricates other sectors for growth.

Somalia has one of the largest coastal lines in Africa, making its tourism and hospitality industry one of the most potential for growth, not to mention the underinvested opportunities in the blue economy which ties the entire economy together.

The objective of this study is to provide substantial information about the Somalia's undiscovered tourism and hospitality sector in order to encourage increased domestic and foreign investment flow to the sector.

The Federal Government of Somalia is committed to advance policies and regulatory framework that improved sector investments and to ensure protection of investments. A such, the Ministry of Planning, Investment and Economic Development has led the enactment of Investments and Investors Protection Law (2023), a law that provides protection of investments and investors alike. Following interesting findings of this study and its recommendation, the government will further re-double its efforts in FDI attraction and domestic investments mobilization.

The Federal Government of Somalia will also steer and fast-track the tourism and hospitality sector strategic development and policy guidelines to further improve and incentivize sector investments.



The Ministry of Planning, Investment and Economic Development is committed to catalyzing the untapped economic opportunities in Somalia's priority sectors and supporting tourism infrastructure developments to create more jobs and spur sustainable economic growth.

With the technical contributions of SOMINVEST, the Ministry will play a decisive role in maintaining a favorable investment environment that encourages inflows of Foreign Direct Investment (FDI) to Somalia.

I wish to thank the European Union Delegation in Somalia, whose funding via the “Support to Policy Dialogue on Investment Climate in Somalia” project enabled this study to be completed. My thanks are also due to the SOMINVEST team, led by Director Mr. Mohamed Dubo, who mobilized all the required human and financial resources to conduct this study. I would like to also personally thank Mr. Lee C. Sorensen, Mr. Yasir Baffo and others who led this study and produced this final product for your better read and decision.

I kindly invite you to read this detailed Priority Sector Investment Report on the Investment Opportunities in Somalia's Tourism and Hospitality Sector and take advantage of its information to make pragmatic investment decisions.

Hon. Mohamud A. Sheikh Farah (Beenebeene)

Minister of Planning, Investment and Economic Development

Federal Government of Somalia



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Minister's Foreward – MOICT

It is my pleasure to present the Priority Sector Investment Report: Investment Opportunities in the Somalia Tourism and Hospitality Sector. This study is spearheaded and conducted by the Investment Promotion Office (SOMINVEST), domiciled in the Ministry of Planning, Investment and Economic Development (MoPIED).

The main objective of this study was to secure locally-generated data regarding Somalia's tourism and hospitality industry, with a view to better understand the sector and ultimately craft homegrown solutions and strategies for reviving this all-too-crucial sector of Somalia's economy.

In January 2023, President Hassan Sheikh Mahmoud announced the key priorities for his government for the year, with all departments expected to have met their objectives by 31st December 2023. These priorities, including the rejuvenated war on Al Shabaab and expanding crucial sectors of the economy, were aimed at ensuring that the country can slowly return to normalcy, rebuild its economy and improve the citizens' livelihoods. It is against this backdrop that this study was conducted.

Somalia is blessed with numerous tourist sites and features that should put it on the global map. To begin with, Somalia is home to the longest coastline in Africa, which boasts over 3,000 key resources. Somalia is also home to tourist destinations in different regions across the country. These tourist destinations are boosted by the bustling Blue Economy sector, agriculture and mineral riches that make Somalia a tourism and hospitality destination of choice.

For more than 30 years now, Somalia's tourism and hospitality industry has borne the brunt of the lawlessness and collapsed systems occasioned by the civil war and terrorism, with some destinations now mere shells and shadows of their former selves. But all is not lost. As the country continues to stabilize, the sector has slowly started to rise out of the ashes of this brutal past.

SOMINVEST has high-quality human and other resources that conducted this study and provided accurate data, findings, conclusions and recommendations that the Ministry of Planning, Investment and Economic Development, The Ministry of Information, Culture and Tourism and all relevant government departments will use to formulate and embark on a formidable campaign to sell Somali as a top-notch, global tourist destination.

The findings, conclusions and recommendations of this study are expected to guide policymakers as they formulate laws and policies to stimulate the revival of the industry. The private sector is also expected to use it as a blueprint for its investment strategies and priorities.



This study also evaluated regional and international best practices that lead to the success of tourism and hospitality industries across the world. This will ensure that Somalia's tourism and hospitality sector not only keeps up with the times but also boost the country's chances of competing on the global stage as a tourism and hospitality hub of note.

At the heart of this study are the people - the citizens of Somalia who stand to gain from the revival of the tourism and hospitality sector. It explores ways in which the sector can boost employment numbers in the country, especially for the youth. Providing gainful employment for the nation's youth will have a role to play in further stabilizing the country as they are less likely to engage in terrorism and other illegalities if they have stable incomes.

My utmost gratitude to the European Union Delegation to the Federal Republic of Somalia for their financial support in conducting this study under the banner of the 'Support to Policy Dialogue on Investment Climate in Somalia' project. Hearty congratulations to the SOMINVEST team led by Director Mohamed Dubo on the successful conclusion of this project.

As ever, my ministry remains committed to supporting individuals, partners and organizations that wish to participate in reviving Somali's tourism and hospitality industry. Our country is fertile ground for investment as it continues to stabilize and the fruits of the government's war on terror continue to be seen every single day.

I urge you to read through this thorough Hospitality and Tourism Priority Sector Investment Study and use the insights therein to make sound, profitable investment decisions.

Hon. Daud Aweis

Minister of Information, Culture and Tourism

Federal Republic of Somalia



Introduction

In line with the 9th Somalia National Development Plan 2020 – 2024 (NDP-9) and the Somalia National Investment Promotion Strategy (NIPS), the Federal Government of Somalia has prioritized attracting and growing domestic as well as Foreign Direct Investment (FDI) as a means to expand the economy, and create more and better jobs, with the ultimate aim to develop a more diversified and future fit sustainable economy (NDP-9 Pillar 3) .

Year over year, the national commitment to improve security shows clear signs of progress as more cities and towns are liberated from the grip of violent extremism followed by an inflow of economic activity to address pent up demand for goods and services. As the market expansion takes place, interest from foreign investors, a number of whom are Somali diaspora living abroad, increases. Foreign investors, many of whom have become more familiar with the unique Somalia business environment and investment climate through coordinate campaigns promoted by the Investment Promotion Office (SOMINVEST), partner countries and donors, seize the opportunity to expand into Somalia markets. Frequently diaspora is instrumental as promoters of opportunities back home in Somalia to foreign companies or organize their own campaigns to establish new businesses or invest back home. Many diasporas partner with local Somali business leaders or return with foreign investment partners and experience in key economic sectors themselves. Each of these would be investors rely on market and investment information.

As such, SOMINVEST, at the Ministry of Planning, Investment and Economic Development (MOPIED), actively pursues sector and sub-sector target specific Investment campaigns. To that end, this Priority Investment Study: Investment Opportunities in the Somalia Tourism and Hospitality Sector, was commissioned by SOMINVEST in harmony with the Ministry of Information, Culture and Tourism (MOICT) and aligned with the NIPS declared high growth potential priority investment sector, Hospitality and Tourism.

As described by the Somalia MOICT, before its collapse in 1991, Somalia had a sizable Tourism Industry, including developed tourist locations ranging from inland to costal locations, highlighting cultural, wildlife and its coastal beach destinations. These formerly known Tourism locations can be revived and the MOICT department of tourism department has already begun work with the Federal Government of Somalia (FGS) more broadly to do so.

Although not yet formally operationalized, a new National Tourism Policy has been developed by the MOICT and was approved by the Council of Ministers (cabinet) of the Federal Government of Somalia in 2019. This policy specifies the overall sector regulation, management, and revival of the tourism industry consulting with all the stakeholders including the private sector. The vision of the National Tourism Policy is “Somalia hosts international tourists in the year 2030” which means the country has to reach a level of recognition for position itself as a tourism destination in Africa. The tourism sector is based on a long vision, starting from the development and revival of the tourism sector in the country by the year 2030. To realize the long-term vision of the tourism sector is essential to reform and re-brand the country’s image through tourism sector.

The MOICT recognizes the significant impact of these policies on socio-economic development and plans to lead Somalia Tourism back to an international level.

This study, conducted through partnership with the EU Support to Policy Dialogue on the Investment Climate in Somalia (SPDI) project, was carried out over the course of the first two quarters of 2023. As there are no significant prevailing recent studies on the Tourism and Hospitality sector in Somalia to reference, this report begins the large task of recapturing a body of information and organizing a view into the very large and dynamic Tourism and Hospitality sector. Where possible, in an effort to encourage greater formation and use of local data, the research team sought to encourage the development of and utilize local sources and reported data from key Somalia government institutions and key informant interviews of those stakeholders presently operating in the market.

This report is broken into seven chapters.

Chapter 1: Introduction to Somalia Tourism and Hospitality Sector, which recounts a history of Somalia tourism and hospitality sector, description of the investment and business growth and Somalia's economic outlook, and an outline of the current investment landscape.

Chapter 2: Regional Hospitality, Air Travel, and Tourism Trends, looks into regional performance of the tourism and hospitality sector to provide context, as well explore Somalia's progress on air travel to illustrate growth in this key sub-sector, and finally to shed light on domestic tourism types and trends.

Chapter 3: Priority Tourism & Hospitality Sub-Sector Attributes & Investment Opportunities, illustrates five key sub-sectors (harmonized with the NIPS) attributes that set up better appreciation for the factors feeding specific investment opportunities within these focal areas.

Chapter 4: Insights from Key Informants of the Tourism and Hospitality Sector, draws from the 73 key informant interviews from current market stakeholders in the tourism and hospitality sector, business owners, managers, employees, and government officials. This chapter highlights common findings and key observations from the interviews, as well sets forth six recommendations to public and private sector actors based on the report findings.

Chapter 5: Case Studies of Successful Hospitality & tourism Investments, providing a representative snapshot of currently performing businesses from within the priority sub-sectors, these case study profiles illustrate for the reader real life examples that can be difficult to envision if one is not familiar with local businesses.

Chapter 6: Resources for Starting a Business in Somalia, which is a basic summary of resources and links to key information available through SOMINVEST or relevant ministries for potential investors.

Chapter 7: Resources to Support Investors, role of MOICT & SOMINVEST, is a basic summary of two resource institutions serving potential investors in the tourism and hospitality sector.

1.1 History of Somalia's Tourism Sector

Somalia is known for its long coastline, beaches, waterfalls, mountain ranges and national parks, not to mention it's long list of numerous historical sites drawing visitors foreign and domestic.

Just after Somalia achieved independence in 1960, a Ministry of Tourism was established in order to regulate the national tourist industry and strategically protect as well as develop the tourism sector.

As a home to several species of wildlife and vast wilderness and mountain areas, these natural resources blessed Somalia. To establish protections of these resources the 1969 Law on Fauna (Hunting) and Forest Conservation¹ was passed, which defined and provided for the establishment of controlled areas to protect vegetation whilst establishing game reserves and partial game reserves. The law was subsequently amended twice in 1971.

The Ministry later passed the Tourism Act in 1984, a bill that set official guidelines for the development and modernization of the tourism sector. Among its stated aims was the acquisition of land in the interior and on the coast as well as beach properties for the purpose of building or expanding tourist infrastructures. The Tourism Act also included provisions for "the protection, preservation and utilization of historic, cultural and artisanal resources; the protection and preservation of ecology and environment; and strict urban and regional planning for zones of touristic interest to include game parks, land and sea parks, sanctuaries, etc.

Following the establishment of the law, a series of National Parks and Wildlife reserves were established, a partial list including Daalo Mountain National Park – Sanaag Region, Hargeisa National Park – Woqooyi Galbeed Region, Hoby National Park – Mudug Region, Jilib National Park – Middle Juba Region, Kismayo National Park – Lower Juba Region, and Lag Badana National Park – Lower Juba.² As well a series of wildlife reserves including; Awdhegla Wildlife Reserve, Boja swamps Wildlife Reserve, Dandoole Wildlife Reserve, Eji Obaale Wildlife Reserve, Far Wamo Wildlife Reserve, Haradere Wildlife Reserve, Jowhar Wildlife Reserve, Lag Badana Wildlife Reserve, and Lack Dare Wildlife Reserve.³

Bordering Ethiopia to the west, Kenya to the southwest and the Indian Ocean to the east, its terrain is mainly highlands and plains and plateaus. With a semi-arid and hot climate which prevails throughout the year. In its earlier state, Somalia was home to several species of animals, though several years of internal conflict has left wildlife in near extinction in most of the country's national parks since there has been little formal protection or management of most areas since the collapse of Somalia's central government.

After the start of the civil war in Somalia in the early 1990s, the tourism institutions were unable to freely operate in the country and subsequently shut down their operations, though the sector did not entirely disappear and indeed has started reestablishment in the 2000s driven by a passion to reclaim its heritage and beauty by its people, and opportunity to rebuild the economy recognized by the private sector. As a part of the voracious growth of residential and commercial real estate development projects in all regions of Somalia, local businessmen and returning Somali diaspora are building and opened number of new hotels and guest houses at a remarkable pace, mainly catering to other Somalis but also the increasing number of foreigners drawn to the expanding private sector or linked to the still strong presence of the development assistance, humanitarian and security activities in Somalia.

In terms of updated regulation since the tourism act of 1984, a new Tourism Policy was developed by the Ministry and was approved by the cabinet of the Federal Government of Somalia as country's National Tourism Policy on the 29th of December 2019. This policy specifies the overall sector management, and revival of the tourism industry consulting with all the stakeholders including the private sector. The vision of the National Tourism Policy is "Somalia hosts international tourists in the year 2030" which means the country has to position itself as a tourism destination in Africa. The tourism sector is based on a long vision, starting from the development and revival of the tourism sector in the country by the year 2030. To realize the long-term vision of the tourism sector is essential to reform and re-brand the country's image through tourism sector.

[1] <https://leap.unep.org/countries/so/national-legislation/law-fauna-hunting-and-forest-conservation-no-15-1969>

[2] <https://www.worldatlas.com/articles/the-national-parks-of-somalia.html>

[3] https://en.wikipedia.org/wiki/List_of_protected_areas_of_Somalia

1.2 Resurgent Investment and Business Growth

The well-known plague of civil war and instability has long dominated the conversation when mentioning Somalia. The spectacular violence, destruction, and risk so strongly captures the imagination that it is oft difficult for one outside the local context to conceive that this Pearl of the Indian Ocean is actually regaining its luster at a very rapid pace. A fact that is not lost by savvy local business owners and diasporans, and increasingly Somali friendly foreign investors who recognize this renaissance as a second 'first mover advantage' scenario.

In recent years, government efforts to create a more conducive business environment, attract foreign direct investment, have made a difference. The adoption of the Somalia Investment Law of 2015 was a strong step forward to promote investment and economic growth through a more favorable regulatory framework for investors.

The passage of the Somalia Companies Act 2019 provides the legal basis to formalize businesses, established the Office of the Company Registrar, and streamline the rules for starting and regulating companies in Somalia. The law also provides the necessary foundation to make operational the online business registration system and help establish the basic requirements for corporate governance, financial and operational reporting by companies, shareholder rights, responsibilities of directors and the dissolution of firms.⁴

Even more recent, the passage of the Anti-Terrorism Law by the Lower House of Parliament in March of 2023 is a historic law that addresses the legal framework to help government security agencies fight and eradicate terrorism in Somalia. By so doing, the security situation is much more apt to stabilize and bolster the case for the right time to enter as a foreign investor. In addition, a newly established tax system encourages investment and growth while establishing an equal playing field for local and foreign businesses, and the increased inflow of interest and newly formed partnerships and investments are evidencing the effort is paying off, as there is a steadily growing number of foreign investments in Somalia in infrastructure, construction, telecommunications, energy and yes, in the tourism related sectors as well as directly in the hospitality sector as well.⁵

One major investment on behalf of the Somali people and the business community, has been the systematic effort to establish the first international airport, Aden Adde International Airport (AAIA), in Mogadishu which has remarkably transformed the nations aviation sector, a move that opens the gateway to the world, boosting tourism of all kinds and carrying eager guests for the rapidly increasing hotels and serviced apartments popping up.

Current airlines services offered from AAIA include local or regional carriers such as Daallo Airlines, Jubba Airways, Freedom Airlines, and African Express Airways. In addition, AAIA services the UN charter plane systems, as well as other charter airlines such as the European Union, US Embassy, and others. International carriers such as Turkish Airlines, Qatar Airways, Kenyan Airways, Uganda Airlines, and Ethiopian Airlines are extending the reach to Somalia from all major inbound locations of the world. Direct flights from Dubai to Mogadishu have strengthened the potential to fly in for business meetings and a short stay without all the additional constraints of infrequent flights or hops from city to city.

One of the most significant investments in the country is the development of the Port of Berbera by DP World, a Dubai-based company. The port, which is strategically located on the Red Sea, is set to become a major gateway for trade between Africa, the Middle East, and Asia. This key investment has increased all levels of port related job opportunities for local communities and attracted other investors to the region, all of which creates demand for increased 'service' based businesses such as restaurants, recreation, hotels and accommodations, in addition to personal services such as cleaning, beautician, transport, and guide services.

Somalia's strategic location in the Horn of Africa, long coastline with increasing investment in ports and infrastructure, and the increased ability to develop and improve its livestock, fisheries, and agricultural resources, is making it a promising business hub in Africa.

[4] <https://documents1.worldbank.org/curated/en/374881593070054717/pdf/The-Passage-of-the-Companies-Act-in-Somali-FCI-Series-Highlighting-the-Achievements-and-Lessons-Learned-from-FCI-Operations.pdf>

[5] <https://somaliiinvestor.so/somalia-a-new-frontier-for-business-and-investment/>

1.3 Somalia's Economic Outlook

According to the recently published (March 28, 2023) Somalia Economic Outlook Report, Somalia's economy has shown resilience in the face of the Covid-19 pandemic. Real Gross Domestic Product (GDP) growth improved to an estimated 2.9% in 2021, following a 0.3% contraction in 2020, primarily due to the pandemic. The International Monetary Fund (IMF) predicted that growth would accelerate to 3.1% in 2023 and 3.9% in 2025.

Housing, water, electricity, and gas inflation rose from 0.43 percent to 12 percent between May 2020 and May 2022 as a result of the drought and rising petrol and gas prices. The Ukraine-Russia war also contributed significantly to high food prices due to disrupted imports of wheat, fertilizer, and oil products. On a positive note, remittances had a very positive impact during the COVID-19 pandemic, as they made households more resilient to economic shocks, allowing them to maintain their standard of living while also saving more.

Internal (taxes and fees) and multilateral and bilateral organizations are the primary sources of revenue for Somalia. The economic report indicated a drop in tax revenue from 2.6% of GDP (\$154.7 million) in 2019 to 2.3% of GDP (\$139.5 million) in 2020. On the other hand, overall revenue rose from 5.7% to 8.3% of GDP in 2019 and 2020, respectively. The decrease in domestic revenue in 2020 was primarily due to the COVID-19 pandemic, while the increase in overall revenue was due to grant inflows during the pandemic period.

At the time of the report, the country's current account was running at a deficit which increased to 17.1% of GDP in 2021, up from 10.4% in 2019, due to a growing reliance on imports over exports and reduced foreign direct investment due to the 2022 parliamentary elections. On the plus side however, Somalia's debt gradually decreased from 94% in 2015 to 73% in 2021, with the debt relief agreement as well as the debt restructuring agreement with the Paris Club's creditors, being credited for the significant debt reduction.

While Somalia's economy has faced numerous challenges in recent years, including insecurity, political instability, and the COVID-19 pandemic, the Economic Outlook report nonetheless indicates that the economy has shown resilience and is on the mend. Livestock exports and remittances have been critical in driving growth, and there are optimistic projections for future growth.⁶

[6] <https://somalainvestor.so/somalia-a-new-frontier-for-business-and-investment/>



1.4 Outline of Somalia's Investment Landscape

Somalia is located strategically in the horn of Africa. The country is bordered by Ethiopia to the west, Djibouti to the northwest, the Gulf of Aden to the north, the Indian Ocean to the east, and Kenya to the southwest. Somalia's surface area is 637,657 km².

With an overall population of 16.1 million⁷, 34% of the country's people are below the age of 14, and 51% of the population is aged between 15 and 64. An estimated 47% of the population live in urban areas.

Somalia has two major economic hubs, Mogadishu and Hargeisa, where most of the urban population is concentrated. There are also several regional cities that are significant centres of trade,

Somalia has a long history of international trade dating back to the Silk Road, when it exported agricultural products such as spices and other valuable commodities.

Although it is classified as a low-income and least-developed country, Somalia is experiencing a positive economic recovery as it emerges from its years of unrest and political and security issues.

According to the IMF, by 2020 Somalia had significantly reduced its debt-to-GDP ratio from 111% to 9% under the HIPC debt relief program.

Due to its proximity to Middle Eastern and EU markets, coupled with a growing population and improved economic and fiscal policies, the country has experienced real GDP growth over the past four years that has averaged about 3.4% per annum⁸.

Contributing to Somalia's economic growth is its progress on numerous investment policies and institutional reforms. These have attracted substantial FDI.

For instance, Somalia's significant ports and airports have seen considerable foreign investment in logistical infrastructure that gives easy access to the Persian Gulf (such as Berbera Port), in addition to substantial management contracts gained through public-private partnerships.

[7] <https://www.unfpa.org/data/world-population/SO>

[8] AFDB Group, Somalia Country Brief 2017-2020

Introduction to Somalia's Investment Policies

The Somalia investment climate has improved over the last five years as supported by substantial reforms in its investment policy framework and promote investment and business development.

Despite the negative impact of Covid-19, GDP growth is expected to reach 3.2% in 2023 [9A]. This will be boosted by various legislative, regulatory and institutional reforms that have improved the investment climate.

The Investments & Investors Protection Law 2023 was signed into law by the president on the 20th of March 2023.

This act protects investors and investments in accordance with and subject to the Constitution, in a manner which balances the public interests and the rights and obligations of investors.

Passage of the Investments and Investors Protection Law strengthens the existing laws and legislations on investments and related matters

The Federal Government of Somalia (FGS) is confident there are profitable investment opportunities in the Hospitality and Tourism sector. There are FGS backed incentives provided to attract investment from the domestic and international private sectors.

The analysis presented in this investment guide illustrates the commitment of the FGS to attracting FDI.

What is the Companies Act?

As cited from the IFC publication, 'The Passage of the Companies Act Somalia', the Somalia Companies Act 2019 provides the legal basis to formalize businesses, establish the Office of the Company Registrar, and streamline the rules for starting and regulating companies in Somalia. The law also provides the necessary foundation to make the online business registration system and help establish the basic requirements for corporate governance, financial and operational reporting by companies, shareholder rights, responsibilities of directors and the dissolution of firms.

The Act's aim is to provide customers, creditors, and suppliers with the information they need to do business with a company with confidence. In this way, the Companies Act aims to help integrate Somalia traders and entrepreneurs into the international economy, facilitating trade, and access to global value chains.

The Somalia Companies Act provides the legal framework to protect creditors and shareholders and enables entrepreneurs to limit their own liabilities. For some foreign investors it is a necessary precondition for investment. By enabling expanded access to finance to Somalia small and medium entrepreneurs (SMEs), the law will also support their growth. Through easier registration, local companies will be able to access public procurement contracts and international supply chains. Government revenue will also increase as companies formalize and submit their annual returns.

There are no restrictions on the creation of private enterprises. Foreign investors are allowed to set up and register a 100% local company with no local shareholders.

Hospitality and Tourism investment related policies have increasingly focused on attracting investments into the sector.

- The Foreign Investment Law of 2015 promotes and protects foreign investments. It aims to offer favourable incentives to foreign investors, such as tax advantages, and guarantees against expropriations. It also guarantees that an investor can settle any dispute through international arbitration.
- Investments & Investors Protection Law 2023. Signed into law by the president on the 20th of March 2023.

Objectives of the Act are to

1. Protect investors and investments in accordance with and subject to the Constitution, in a manner which balances the public interests and the rights and obligations of investors.
2. Affirm the Federal Republic's sovereign right to regulate investments in the public interest.
3. Confirm the Bill of Rights in the Constitution and the laws that apply to all investors and investments in the Federal Republic; and
4. Strengthen the existing laws and legislations on investments and related matters.

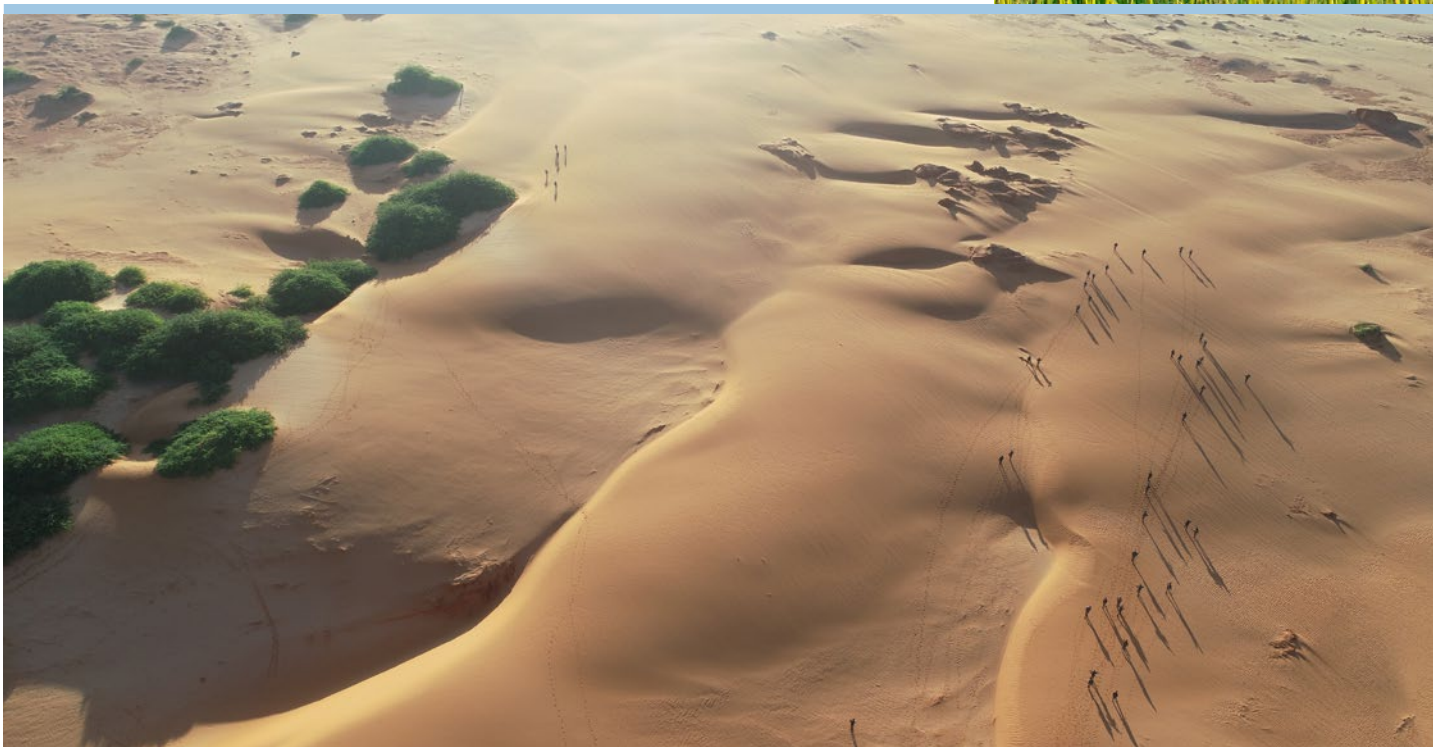


Chapter 2: Regional Hospitality, Air Travel, and Tourism Trends

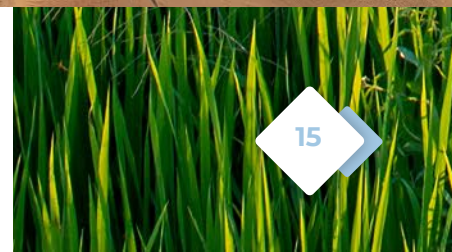
2.1 Regional Hospitality & Tourism Performance

According to the 2022 World Travel and Tourism Council Economic Impact report, 2021 Travel & Tourism in Africa started recovering from the devastating impact of the pandemic as its contribution to the region's total economy grew by 23.5%, increasing from US\$ 97 billion in 2020 to US\$ 119 billion in 2021. This rate of recovery was faster than that of both the region's economy (5.8%) and the world's Travel & Tourism sector (21.7%). Such growth resulted in an improvement in Travel & Tourism's share of economy GDP, which increased from 3.8% in 2020 to 4.4% in 2021. The growth was faster in North Africa (26.8%) than in Sub-Saharan Africa (21.7%)⁹.

Although the WTTC does not publish data on Somalia, we know that regionally, Africa's rebound in travel and tourism far outpaced the regional overall economic recovery as well Africa outpaced the rest of the world's Travel and Tourism recovery. These are hopeful indicators and good news for a Somali Travel and Tourism sector that is in the beginning stages of a renaissance. Especially since the same report cited above claims that, in the next decade, the



[9] Source: World Travel and Tourism Council: Travel & Tourism Economic Impact Global trends 2022. All rights reserved. <https://wtcc.org/Portals/0/Documents/Reports/2022/EIR2022-Global%20Trends.pdf>



Travel and Tourism sector is estimated to grow at an average annual rate of 6.8%, which is higher than the 3.3% estimated growth for the entire regional economy. It is also expected to create 14 million new jobs in the region by 2032.¹⁰

Driven by a domestic revival and returning diaspora hungry to engage their homeland, Somalia is experiencing growing demand and confidence to reclaim former tourist destinations across the country. The tourism department within the Federal Government of Somalia, in particular the Ministry of Information, Culture and Tourism, has already begun to revitalize tourism industry.

Some of the more obvious public efforts that demonstrate moves toward formalizing the sector include the creation of the Somali Tourism Association (SOMTA), established in 2012, in

addition to the Somali Association of Travel and Tourism Agents (SATTA) in 2022. To address the need for qualified skilled workers in the sector, the Somali Institute of Tourism and Hospitality (SITAH) was established in 2015. At the time this was the first technical and academic institute of its kind in Somalia committed to advancing the professional training of skilled workers for tourism and hospitality in Somalia.

On the international level, Somalia joined the United Nations World Tourism Organization (UNWTO) in 2017, a move that signaled Somalia's deepening commitment to embrace Tourism as a critical economic sector in Somalia, and as a demonstration of its interest to develop sustainable, competitive, and economically positive approaches that foster knowledge, education, and job creation for Somalis.

The **World Tourism Organization (UNWTO)** is the United Nations agency responsible for the promotion of responsible, sustainable, and universally accessible tourism. As the leading international organization in the field of tourism, UNWTO promotes tourism as a driver of economic growth, inclusive development and environmental sustainability and offers leadership and support to the sector in advancing knowledge and tourism policies worldwide.¹

UNWTO Priorities Mainstreaming tourism in the global agenda: Advocating the value of tourism as a driver of socio-economic growth and development, its inclusion as a priority in national and international policies and the need to create a level playing field for the sector to develop and prosper.

Promoting sustainable tourism development: Supporting sustainable tourism policies and practices: policies which make optimal use of environmental resources, respect the socio-cultural authenticity of host communities, and provide socioeconomic benefits for all.

Fostering knowledge, education, and capacity building: Supporting countries to assess and address their needs in education and training, as well as providing networks for knowledge creation and exchange.

Improving tourism competitiveness: Improving UNWTO Members' competitiveness through knowledge creation and exchange, human resources development and the promotion of excellence in areas such as policy planning, statistics and market trends, sustainable tourism development, marketing and promotion, product development and risk and crisis management.

Advancing tourism's contribution to poverty reduction and development: Maximizing the contribution of tourism to poverty reduction and achieving the SDGs by making tourism work as a tool for development and promoting the inclusion of tourism in the development agenda.

Building partnerships: Engaging with the private sector, regional and local tourism organizations, academia and research institutions, civil society, and the UN system to build a more sustainable, responsible, and competitive tourism sector.

[10] Source: World Travel and Tourism Council: Travel & Tourism Economic Impact Global trends 2022. All rights reserved.

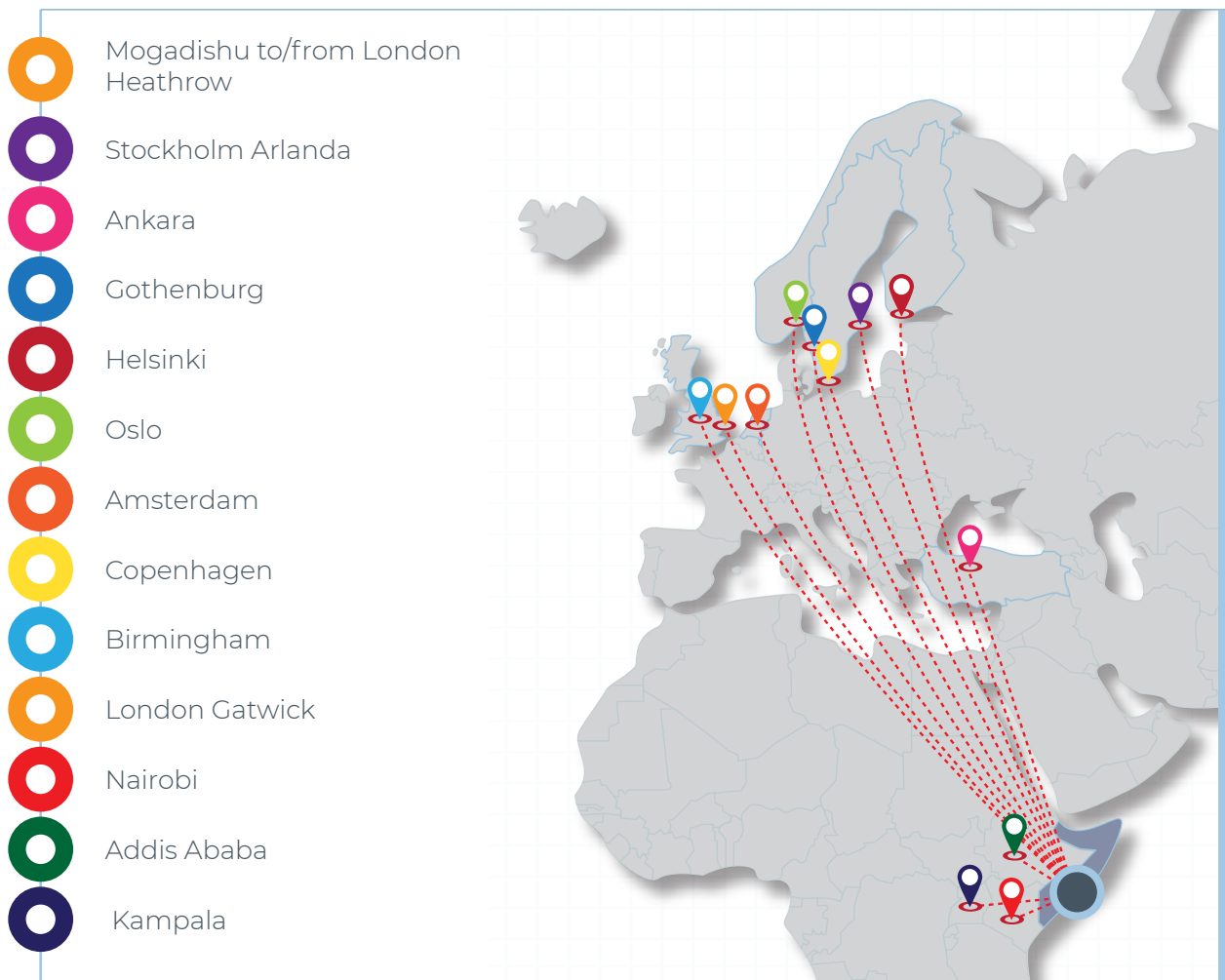
2.2 Air Travel

A strong Aviation sector is critical to grow regional tourism, making quick and convenient access to tourists who want to visit locally developed tourist destinations. For a country that experienced decades where freedom of movement was not so possible, opening the Somali airspace has been even more important.

Perhaps one of the better snapshots of how Somalia has flourished in terms of international air travel, is an article published in 2022 highlighting, '10 years on: Inside Turkish Airlines Somalia Service'. Almost a decade has passed since Turkish Airlines inaugurated Mogadishu, Somalia. At the time, people were skeptical about it, suggesting that it didn't make sense, primarily because of the country's instability.

Turkish Airlines started Istanbul to Mogadishu on March 6th, 2012, despite Somalia's unrest that typically deterred airlines. The route materialized seven months after the Turkish Prime Minister visited the country and was the first long-haul service in nearly 30 years.

So where do people go who come in and out of Mogadishu? In 2019, the last normal year pre COVID, booking data shows that approximately 49,000 people transited Istanbul from Mogadishu. The UK, Sweden, wider Turkey, Finland, and Norway saw the most passengers, mainly because of the Somali diaspora. Over 250,000 Somalis (and those of Somali heritage) reside in the UK and Nordics, while Turkey is of growing importance. At airport level, the leading origins and destinations were as follows.



[11] Simple Flying - January 5, 2022 - Accessed May 9, 2023 - <https://simpleflying.com/turkish-airlines-somalia/#:~:text=Turkish%20Airlines%20started%20Istanbul%20to,service%20in%20nearly%2030%20years>



Perhaps the strongest affirmation of Somalia's strengthened Aviation sector came in January of 2023, when the International Air Transport Association (IATA) welcomed the reclassification of airspace over Somalia and the surrounding region to Class A when air traffic control services were operationally restored after a 30-year disruption.¹²

Some of the region's busiest airways - linking the African subcontinent south of Ethiopia with the Middle East and Indian subcontinent as well as Western Europe with the Indian subcontinent and Indian Ocean islands - traverse Somalian airspace, which is officially known as the Mogadishu Flight Information Region (FIR). It covers the landmass surrounding the Horn of Africa and extends into the Indian Ocean.

The reclassification of the airspace, and the operational resumption of air traffic control in the Mogadishu FIR was made possible with the installation and commissioning of modern radio navigation and other technological infrastructure. It follows a successful trial which began mid 2022. The upgrade of air traffic management and improved navigation and communication infrastructure will enhance situational awareness along an increasingly busy air corridor and its intersections with routes linking many of the world's regions.

Shortly following this historic restoration of the airspace to Class A, in February 2023 the IATA further announced a formal cooperation agreement with the Government of the Federal Republic of Somalia to deepen and formalize cooperation with the aim of strengthening the economic and social benefits of aviation in Somalia. Under formal agreement a new framework was established that will see an expansion of IATA's activities in the country.¹³

Aviation is a significant contributor to the UN's Sustainable Development Goals (SDGs), so the potential for a strengthened air transport sector to contribute to Somalia's development is enormous. This agreement aims to realize that potential for social and economic development by focusing on global standards and best practices.

Somalia has a strong vision for a successful aviation sector to contribute to a more prosperous country. The agreement provides the framework to support IATA's mission for aviation in Africa: the creation of a safe, efficient, sustainable, and economical air transport sector that generates growth, creates jobs, and facilitates international trade and tourism as well as playing an essential role in supporting the UN SDGs through generating connectivity between nations.

[12] IATA Reclassification of Airspace to Class A <https://www.iata.org/en/pressroom/2023-releases/2023-01-25-01/>

[13] IATA Signs Agreement with FGS to formalize cooperation – February 6, 2023 – Accessed May 9, 2023 - <https://www.iata.org/en/pressroom/2023-releases/2023-02-06-03/>

2.3 Tourism Trends

As background to a discussion of the Natural Heritage of Somalia – National Parks & Wildlife Reserves, the reader should know that while this section discusses the history and evolution of laws and plans for protections of the biodiversity of Somalia, with a few exceptions, the National Parks, Wildlife areas and national forests described are designated essentially in word only. As the discussion will indicate, while the intentions to develop a robust tourism and national parks system existed in earlier times under the Siad Barre administration, essentially all efforts collapsed along with the outbreak of civil war in 1991.

While the National Parks and reserves do exist by designation, only two of these, Daalo-Forest, and Gacan-Libaax in Somaliland, are fully active, which means the park is legally gazetted, has protection status, has a management plan and Guards are patrolling its boundaries and people visit regularly. Daalo-Forest and Gacan-Libaax are currently managed by the Somaliland Ministry of Environment and Climate Change¹⁴, which has active presence in the parks through guards.

The remaining are inactive, which indicates they are a proposed NP/WR on paper, though at present

these have no functioning system of support, management, or budget. While people may visit, it is not through a controlled or patrolled oversight system.

As this study shows, regional neighbors to Somalia benefit greatly from a robust national parks and wildlife reserves system in terms of ecotourism contributions to national GDP, employment, and protections to environment and natural resources, it will require a strong national commitment with focused resources for Somalia to also realize such benefits. Though Somalia is already committed to the path toward protections of environment and natural resources, as Somalia has joined by accession in 2009, the Convention on Biological Diversity¹⁵, as well, Somalia have made commitments to UN Paris Climate Agreement issuing and enhanced and ambitious Nationally Determined Contribution (NDC)¹⁶ which aligns with the National Development aspirations. Collectively, commitments to address environmental protections and national development could be pursued resulting in boosts to environment and economy.

2.3.1 The Natural Heritage of Somalia - National Parks & Wildlife Reserves¹⁴

The following brief of 'The Natural Heritage of Somalia' and introduction to the existing national parks and potential protected areas is provided courtesy of the Dr. Osman Gedow Amir, director of the National Museum of Somalia, Mogadishu.

The Natural Heritage of Somalia

Somalia covers an area of 637,657km² with inhabitants of 17,158,889 million people (world meter 2023); it has a coastline of 3898 km long with an Exclusive Economic zone of 759, 253 Km² is one of the largest in the Eastern African region (FAO-Globefish 2020). Climatically Somalia is arid and semi-arid land dominated by the monsoon winds; Rainfall is the most important meteorological element affecting the social and economic activities in Somalia.

The biodiversity of Somalia is complex in varieties of life and its taxonomic situation, but it is least well studied because of the large gap exists in knowledge and distribution pattern of the flora and fauna of the country. The available information on Somalia's biodiversity has revealed that it has 1340 animal species and 3165 species of plants, which adapted to its unique ecological conditions prevailing in the Horn of Africa. The biodiversity is currently under threat of losing its unique flora and fauna due to overexploitation of natural resources and loss of habitats in the terrestrial and marine environment.

[14] <https://moecc.govsomaliland.org>

[15] <https://www.cbd.int/countries/profile/?country=so>

[16] <https://ndcpartnership.org/news/somalia-submits-enhanced-ndc-recognizing-climate-crisis-urgency-emphasizing-adaptation>

[17] IATA Signs Agreement with FGS to formalize cooperation - February 6, 2023 - Accessed May 9, 2023 - <https://www.iata.org/en/pressroom/2023-releases/2023-02-06-03/>

The species of the Somalia biodiversity that are under threat include the highly endangered Somali boubou, *lanarius erlangeri*, and two endemic species of Juba weaver, *Ploceus dichrocephalus*, and white-winged dove, *Streptopelia rechenowi* which are confined to the disturbed forest along the Juba and Shabelle River, in northern mountains, two endangered species such as Somali thrush, *Turdus ludoviciae* and Warsangeli linnet, *Carduelis johannis*, are recorded in Juniper Forest. The grassland in the central and the northern region conceals Ash's lark, *Mirafrasi*, and Archer's lark, *Heteromirafrasi archeri* respectively. In mammals, Somali wild ass, *Equus africanus somaliensis*, only few individuals may remain in the Nugal valley and it is at the brink of extirpation from Somalia, few endemic antelopes such as Dibatag, *Ammodorcus clarkei*, Speke's gazelle, *Gazella spekei* and Silver Dikdik, *Madoqua piccentinii* are found in central and northern regions, while some others such as Gerinuk, *Litocranius walleri*, Beisa Oryx, *Oryx beisa* extend their range into Ethiopia and Kenya (Amir 1998 & 2001).

Somalia is endowed with the diverse ecosystem in which diverse flora and fauna are found; the major ecosystems found in the country are described in detail below:

- **Montane evergreen forest ecosystem:** This is the highland forest in the northern mountains covering the area between Berbera and Bosaso. The predominant species in the montane zone is *Juniperus procera* which extends over the higher elevation of the Golis Mountain range in northern Somalia, the other evergreen species found in montane are *Buxus hilderbrandtii*, *Dodonea viscosa*, *Cordia purpurea*, and *Euclea schyrimperi*.
- **Lowland coastal evergreen forest ecosystem:** The lowland forest is confined within the Juba Valley and the extreme southerly tip of the country; these areas are majorly composed of mixed deciduous tropical species. There has been rapid deforestation along the perennial rivers because of agricultural developments and overexploitation of the resources such as timber, fuel wood, and fodder, the forest has seriously degraded over the last 150 years.

- **Acacia-commiphora ecosystem:** Bushland dominates the Somali land, and it typically constitutes a wide variety of woody plants, with acacia and Commiphora less than 6m high as dominant tree species. In more arid areas, it may be reduced to scattered low bushes but to the other extreme, it may merge into woodland with emergent trees up to 12m high.
- **Coastal Grassland and bushland ecosystem:** Grassland still exists on the northern Plateau and along eastern maritime plains; the coastal plain in the north is a narrow strip between Zeila and Berbera and supports clump grass such as *Lasiurus scindicus*, associated with annual grass such as *Aristida adscensionis*, *Eragrostis* sp, *Cenchrus ciliaris*. There is lowland grassland in the northwest, which is millions of acres large.
- **Coastal Marine Ecosystem:** Somalia has a largely untapped Extensive Economic Zone (EEZ) stretching to 200 miles offshore. It has the longest coastline in Africa which extends over 3,898 km and it is one of the most important large marine ecosystems in the West Indian Ocean (WIO).

Existing National Parks and Potential protected areas

Somali communities have tolerated wildlife, lived amongst them, and used wildlife resources since time immemorial without formal policy and legislation, these communities ensured the conservation of wildlife resources through cultural and social ethics; though some religious and cultural beliefs ensured that no hunting of certain species such as elephants, Rhinoceros, big cats, carnivores, and birds of prey hence this kind of conservation principle became part of their way of life.

The first wildlife policy in Somalia was enacted by the Italian Authority in 1952 establishing the first National Park in the Jubaland state, the Bushbushle National Park, and the second law was proclaimed in the protectorate of Somalia in 1955 and established Daalo Forest and Gacan-Libaax national park for the northern regions. After independence, the government does legislation the law on Fauna (Hunting) and Forest Conservation (Law No. 15 of 25 January 1969) and this new law repealed and replaced the previous laws of the British protectorate and the Italian Somali Authority; the

law allowed the government to designate five kinds of protected areas:

- Game Reserve — Hunting without a ministerial license, entry, and residence, starting fires, and possession of weapons capable of killing an animal are prohibited.
- Controlled Area—Written permission is required for hunting, but entry and residence are not restricted.
- Partial Game Reserve—Hunting of certain species without a ministerial license is prohibited.
- Forest Reserve—Established by Presidential decree; the cutting, burning, removing, or damaging of any forest product, construction of a building, shelter or livestock enclosure, grazing of livestock, collection of honey or beeswax, construction of a road, path, watercourse, fence or obstruction are all prohibited, although exemptions from any of these can be made by the Minister.
- Grazing Reserve—Access to, and timing of, grazing is controlled, and a fee per head is paid

PROTECTED AREAS

Much of global WT takes place in Protected Areas (PAs). PAs are defined by the IUCN as falling into the following categories:

Ia Strict Nature Reserve - strictly protected areas set aside to protect biodiversity and also possibly geological/geomorphic features, where human visitation, use and impacts are strictly controlled.

- **I** Wilderness Area - Usually large unmodified or slightly modified areas, retaining their natural character and influence without permanent or significant human habitation.
- **II** National Park - protected areas which are large natural or near natural areas which also allow for visitation.
- **III** Natural Monument or Feature: - protected areas set aside to protect a specific natural monument, such as a landform, sea mount, submarine cavern or geological feature.

- **IV** Habitat/Species Management Area — these protected areas aim to protect particular species or habitats and management reflects this priority.
- **V** Protected Landscape/ Seascape - protected areas where the interaction of people and nature over time has produced an area of distinct character with significant, ecological, biological, cultural and scenic value.
- **VI** Protected area with sustainable use of natural resources - protected areas conserve ecosystems and habitats together with associated cultural values and traditional natural resource management systems.

In practice, this and many other WT or similar studies exclude PAs falling into Category Ia and Ib as these are generally off-limits to human visitation.

In addition, in 1990 the Wildlife Law and Regulations were proposed which gave provision for the establishment of a further five categories of protected areas:

- National Park—Hunting, molesting or disturbing animals, various forms of pollution, obstructing watercourses, damaging vegetation, collecting honey or beeswax, introducing any animal, clearing, or cultivating land, mining, quarrying, or prospecting and the carrying of any weapon, ammunition or explosive are all prohibited.
- National Conservation Area— Entry of non-residents without a permit is restricted.
- Trans frontier Wildlife Protection Area—to be established in frontier zones adjacent to protected areas on the other side of the border.
- Provisional National Reserve/Provisional National Park—to be established immediately where there is an urgent need for the protection of an area.

Citations relevant to the brief are found in footnote¹⁸

[18] Amir, O. G. (1998) Biodiversity of Somalia, endemic vertebrate fauna and threatened animals (unpublished research report)

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SOMALI NATIONAL PARKS WILDLIFE RESERVES ESTABLISHED FROM 1952 - 1991

Table 1 - Somali National Parks

SOMALI NATIONAL PARKS

S/N	NATIONAL PARK NAME	REGION	INTERNATIONAL ORG. RECOGNITION	ACTIVE	INACTIVE
1	Anole-Farbidow	Jubaland			X
2	Arbowerow	Southwest			X
3	Awdheegle-Gandershe	Southwest			X
4	Bacad	Hirshabelle			X
5	Borama-Gools	Somaliland			X
6	Buq-Goosar	Hirshabelle			X
7	Bushbush	Jubaland			X
8	Daalo-Forest	Somaliland	IUCN	X	
9	Gacan-Libaax	Somaliland	IUCN	X	
10	Jazeera	Southwest			X
11	Jowhar-Warsheikh	Hirshabelle			X
12	Lack-Dhere	Jubaland	IUCN		X
13	Lack-Badane	Jubaland	IUCN		X
14	Lasanood-Taleex				X
15	Ras Guba	Puntland			X
16	Raas-Hafuun	Puntland			X
17	Zeila	Somaliland			X

ACTIVE: Indicates the park is legally gazetted, has protection status, Management plan and Guards are patrolling its boundaries. People visited regularly. INACTIVE: Indicates it is a proposed NP/WR on paper, though at present it has no functioning system of support or budget

Table 2 - Somali Wildlife Reserves

SOMALI WILDLIFE RESERVES

S/N	WILDLIFE RESERVES NAME	REGION	INTERNATIONAL ORG. RECOGNITION	ACTIVE	INACTIVE
1	Boha-Swamps	Jubaland			X
2	Eji- Oobaale	Hirshabelle			X
3	El Chebet Area	Puntland			X
4	El Hammure	Galmudug			X
5	Far Libaax	Hirshabelle			X
6	Far Waamo	Jubaland			X
7	Galkacyo	Galmudug			X
8	Harardhere-Awle Rungo	Galmudug		X	X
9	Harqan-Dalandoole	Hirshabelle		X	
10	Haryiblane				X
11	Hobyo	Galmudug	IUCN/WWF		X
12	Mata Arba	Gedo			X
13	Qurajo	Nogal			X
14	Wadi Tudi	Bari			X

ACTIVE: Indicates the park is legally gazetted, has protection status, Management plan and Guards are patrolling its boundaries. People visited regularly. INACTIVE: Indicates it is a proposed NP/WR on paper, though at present it has no functioning system of support or budget.

Table 3- Somalia National Forests

SOMALI FORESTS

S/N	FOREST NAME	REGION	INTERNATIONAL ORG. RECOGNITION	ACTIVE	INACTIVE
1	Baraako-Madow & Shoonto	Jubaland	IUCN		X

Somali National Park Spotlights

Daallo Mountain



Daallo Mountain - Sanaag Region

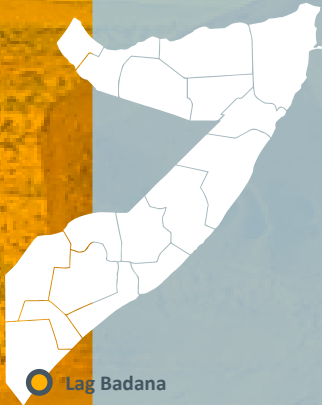
Daallo Mountain, locally known as Buuraha Daalo and officially known as Golis Range Mountains, is a national park located in the town of Erigavo Sanaag region, Somalia. The mountains are 400ft above the sea level and located 27 miles east of the white sand beach of Mayd. The beach is known to be a paradise for fish and lobster lovers. The park is unique place due to its 60-mile-long thick forest that is home to more than 3,000 species of trees shrubs and other plants such as the acacia, mooli flowers, aloe vera, and the Buxus forest stand. Some of the oldest trees in Africa are found in the park with some being over 1,000 years. Several animals are also found in the park. The kudu, warthogs, antelopes, and the Somali sheep are some of the herbivorous found in the park. The lion and the leopard are some of the few predators that are found in the park with most of them falling prey to poachers seeking animal parts. Lawlessness in the country is county is a threat to the survival of the forest as poachers threaten animals while the increase in population continue to push their way to the forest and engage in charcoal burning.¹⁹

Lag Badane National Park – Lower Juba Region

Lag Badana National Park locally known as Bushbush national park is located on the southern coast of Somalia. The park was the first park to be established in Somalia in the late 1980s, by the Said Bare administration. The ministry of tourism established the park due to the presence of the coral reef on the shore of the Indian Ocean bordering the park. The protection of the park and its development were halted when the regime was toppled. The park contains over 200 species of plant, 20 of which are endemic to the park. Several animals such as monkeys, hyenas, and foxes are found in the park, birds such as the dik-dik Speke and the obbia lark are also found in the park. In 2014 President Hassan Sheikh Mohamud initiated some development projects including establishing new management of the park and strengthening its' environmental preservation.²⁰

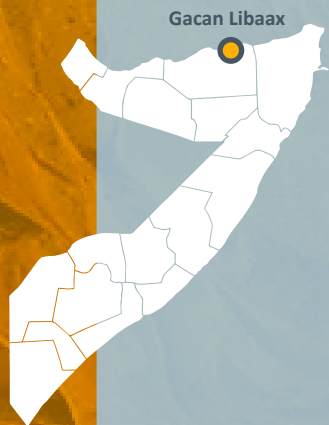
* It should be noted that there can be confusion as to the names of Lag Badane National Park, as it is at times referred to as Lag Badane, then Bush Bush, or Bushbusals. In the Lag Badane/Bushbushle NP there are two Lake and Valley areas of overlap. One is inside the park Lag-Badane (Lake Badane) and other is stretching from the Kenya border and is called Lac Dhere (Lake Dhere). Lag Badane, also known as Bushbush refers to the core areas of the NP where hunting was prohibited, and the Lag Dhere area is a smaller buffer zone area on the outskirts where hunting was allowed.

Lag Badana



[19] <https://www.worldatlas.com/articles/the-national-parks-of-somalia.html>

[20] <https://www.worldatlas.com/articles/the-national-parks-of-somalia.html>



Gacan Libaax National Park – central Somaliland

Gacan Libaax (Ga'an Libah) mountain is part of an extensive highland ecosystem in central Somaliland which is an extension of the Ethiopian highlands, forming the Golis Range which extends as far as Cal-Madow to the eastern part of Bosaso. The height of the Mountain reaches about 1719 m above sea level and is situated approximately 145km east of Hargeisa. Ecologically, Gacan Libaax falls in the evergreen ecological zone patches of Juniper forest which occur on the highest sections of Gools escarpments. The vegetation of Gacan Libaax is classified as a climatic relict of Juniperus forest and other deciduous evergreen bushes such as *Buxus Hildebrandti*, *Dodonea viscosa*, *Acokanthera schimperi*, the National Park is of ecological importance to the area for its rich bio-diversity and conceals many undescribed flora and fauna of the areas, the areas support diverse fauna include hamadryas baboon (*Papio hamadryas*), Klipspringer (*Oreotragus oreotragus*), Beira (*Dorcatragus megalotis*), and Speke's gazelle (*Gazella spekei*) Pelzeln's gazelle (*Gazella dorcas pelzelni*). Native birds include the sombre rock chat (*Oenanthe dubia*), Gambaga flycatcher (*Muscicapa gambagae*), Little Brown Bustard (*Eupodotis humilis*), Somali Starling (*Onychognathus blythii*) and Somali golden-winged grosbeak (*Rhynchostruthus louisae*).

Gacan-libaax forest receives moisture in the form of mist, as maritime air is forced up over the area; this moisture helps to support patches of forest, which themselves facilitate the formation and entrapment of mist in a self-contained system. If the forest is degraded the cycle may be broken. Since the area is also an important water catchment for a wide area, it is important that this system continues to function. The Ga'an Libah remained a protected area till the outbreak of the civil war in 1988 and followed the collapse of the Somali state in 1991; the Juniperus forest and evergreen deciduous belt in the National Park were inaccessible to the pastoral people in the areas under the legislative act, while after the collapse the state became open for the grazers and the NP was severely degraded during the exigency droughts.²¹

[21] Overview courtesy of Dr. Osman Gedow Amir, Director of the National Museum of Somali, Mogadishu.

2.3.2 Regional Wildlife and Eco-Tourism - The cases of Kenya & Rwanda

THE CASE OF KENYA WILDLIFE TOURISM

Wildlife Tourism has grown in Kenya over the past several decades, with early initiatives influenced by policy changes that saw the creation of national parks and reserves and banning hunting. Taking a historical perspective, in the 1980s, the WT industry boomed, relatively speaking, with increased lodge capacity and size to cater for increasing visitor numbers. Past estimates indicate that WT accounted for about 70% of tourism earnings and more than 10% of total formal sector employment in the country. Despite the growth of both private reserves and beach tourism, the heart of Kenya's WT and ecotourism industry remains its national parks and reserves and their surrounding buffer zones.

Kenya has led some of Africa's earliest experiments in community-based conservation using park and tourism revenues and began the first efforts to systematically adopt a set of principles and practices in its national park system. The private sector has also been key to the development of WT and ecotourism in Kenya. Today, roughly 75% of ecotourism ventures are public-private partnerships. Yet in regulatory terms, the Wildlife Conservation and Management Act still recognizes the state as the sole regulator of matters related to wildlife, a position perceived as restrictive and insensitive to the realities of wildlife conservation, particularly the potential role of local people. To address this gap, the Kenya Wildlife Service (KWS) was created through subsidiary legislation that allows private people to participate in wildlife conservation and WT subject to compliance with legislative requirements.

As the Kenyan human and livestock population grows, the sustainable development and management of its nationally vital wildlife resources and of its robust safari tourism sector remains a major concern. The country is experiencing an accelerated decline of its wildlife population.²²

THE CASE OF RWANDAN TOURISM AND CONSERVATION

In pursuit of sustainable and accelerated economic growth, in particular post COVID-19, the Government of Rwanda has implemented proactive measures since 2020, including prioritizing healthcare and digitalization, supporting affected businesses and households, and implementing a comprehensive economic recovery plan. These efforts brought economic stability and set the stage for impressive growth in GDP by 8.2% with the services sector accounting for 46% of the growth and the industry sector contributing 21%. Key priority sectors such as manufacturing, agriculture, and construction, mobilised investments of USD\$1.75 billion and created 35,000 jobs since 2020, and tourism saw a rebound to nearly pre-pandemic levels in 2022, generating USD\$455 million.

Tourism revenues, including Meetings, Incentives, Conferences, and Events (MICE), experienced a substantial increase of 171.3% from US\$164 million in 2021 to US\$ 445 million recorded in 2022. This growth represents a remarkable 89.3% recovery compared to pre- pandemic period. In 2022, Rwanda welcomed a total of 1,105,460 international visitors, of which more than 60% came from African countries, highlighting the country's growing popularity as a destination within the continent. Furthermore, 47.5% of the visitors came for business purposes, reflecting Rwanda's positioning as a hub for business activities.

In 2022, Rwanda's MICE industry continued to grow with impressive results, generating a total of US\$ 62.4 million from hosting 104 events. These events were attended by more than 35,000 delegates, representing a significant increase from the previous year. Additionally, the gorilla tourism industry, which is a major driver of high-end tourism in Rwanda, generated US\$ 113 million in 2022, surpassing the 2019 level by 6%. Domestic and international tourists boosted National Parks visits. In 2022, total National Parks revenues stood at US\$ 27 million, a significant increase from US\$ 8.1 million in 2021.

The government's unwavering focus on key priority sectors and sustained investment in tourism will be critical to sustaining and accelerating economic growth. With ongoing efforts and strategic planning, Rwanda is well-positioned for a prosperous economic future.

[22] Source: Rwanda Annual Report 2022: Beyond Recovery, Towards Sustainable Economic Growth.

2.3.3 “Tour Somalia Hot Spots” – Popular Tourism Sites²³

TOUR SOMALIA HOT SPOTS POPULAR TOURISM SITE PROFILES

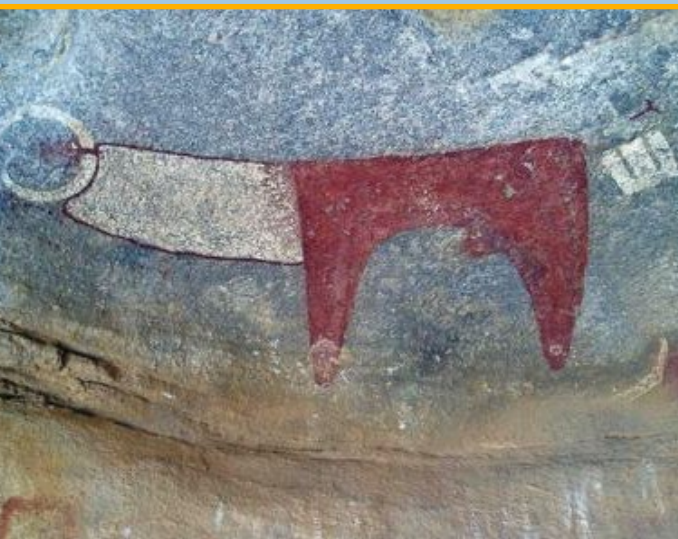
Laas Geel

Laas Geel is situated between the dusty ridges and hills on the outskirts of Hargeisa, the capital of Somaliland. Home to some of the earliest cave paintings ever discovered on the Horn of Africa. The alcoves and underground tunnels display a hauntingly raw vision of prehistory in these parts. You'll see colorful motifs of shepherds attending to their herds of cattle, as well as depictions of 'deified' cattle. As it remains in its original undeveloped state, visitors experience the ancient dwelling paintings as if they are the first to discover them. (Photos are from these links

(https://en.wikipedia.org/wiki/Laas_Geel)

(SOMALIA TOURS: <https://www.kanaga-at.com/en/destination/somalia-en/>)

(Photos below are courtesy of the creative commons.)



[23] https://en.wikipedia.org/wiki/Tourism_in_Somali

EU Support to Laas Geel

The Laas Geel caves hold some of the earliest known cave paintings in the Horn of Africa. In 2002, a team of French archaeologists estimate the paintings to be between 5,000 and 7,000 years old, making it the most significant cave art in the region due to the quality and stories told by the illustrations.

In recognition of the critical timing to conserve and protect such a cultural treasure, the European Union announced the very first international support for the conservation and protection of the Laas Geel cave paintings in March of 2020. The then EU Ambassador to Somalia, Nicolas Berlanga said, *“Protecting Laas Geel is keeping part of the heritage of all of us. Heritage is culture and also a window to foster understanding between people and communities. Culture is also a source of revenues and a path to engage young generations in the preservation of their past. With this programme, the EU intends to build bridges among generations and Somali citizens and between our respective societies.”*

The 12-month programme was implemented by the Hargeisa Cultural Centre in cooperation with the Ministry of Trade, Industry and Tourism, and entailed capacity building for the site management, the fencing of the entire heritage site, removing of invasive vegetation, and the construction of pathways to the visits.

This collaboration between Donor and local ministries came in recognition of the importance of such rare historical and cultural sites, and the need to invest in their preservation and protection, which in turn is an investment in the future generation's appreciation of the rich cultural heritage of the region. Laas Geel drives tourism, a key contributor to the economy, thereby making Donor and domestic investments into such sites a solid investment in the future all around.

Sa'ad ad-Din Island

Situated in the fabled Zeila Archipelago, Sa'ad ad-Din Island is just off the coast of Somaliland near the ancient city of Zeila. As one of the country's rare national parks, the island enjoys beautiful coral reefs and bays of turquoise water. The shore is a stretch of ivory-colored sandy beaches scattered amongst the craggy peaks of sandstone outcroppings of rock. Divers will no doubt see a kaleidoscope of colorful schools of fish in this spot where the Red Sea mixes with the larger animals of the Indian Ocean to create a unique show of marine life.

(https://en.wikipedia.org/wiki/Zeila_Archipelago)



Iskushuban

A major attraction in the Puntland region of the Northern portion of Somalia which has beautiful waterfalls that gush during the rainy season, this ancient settlement of Iskushuban has crenulated walls of dust-caked stone and beautiful arabesque fortifications from bygone centuries. The location is thought to be one of the main powerbases of the Majeerteenia Sultinate that ruled the tip of the Horn of Africa for much of the 19th and 20th centuries. (Wikipedia -'Boqortooyada Majerteen', also known as Majeerteenia and Migiurtinia, was a Somali kingdom centered in the Horn of Africa. Ruled by Boqor Osman Mahamuud during its golden age, the sultanate controlled the areas which are now called Puntland.)

<https://en.wikipedia.org/wiki/Iskushuban>



<https://twitter.com/DrAdamAdde/status/970984958184566784>



Islamic Heritage

The Islamic civilization has strongly shaped Somali culture and heritage which can be seen through the authentic Islamic architecture, dress code, food, and mosques. Emblematic of this influence is the beauty and majesty of the Ali Jimale Mosque, the newly iconic and biggest mosque in modern Somalia is located in Mogadishu and ranks as one of the top new tourism destinations frequently visited by Mogadishu residents, diaspora, and Islamic scholars.

Masjid Al-Qiblatayn, in Awdal region, is one of the oldest mosques in Somalia which is said to have been built in the 7th century. Al-Qiblatayn Mosque is designated as a tourism and heritage site.



Masjid Al-Qiblatayn, in Awdal region



Ali Jimale Mosque, Mogadishu

2.3.3 Cultural Tourism

The benefit of cultural tourism includes much more than just the economic in terms of growth, job creation and intangible impacts. Travelling to reconnect with one's own culture or experience the culture of a destination for the first time, means gaining an appreciation of cultural diversity, enhancing tolerance, and helping to keep cultural heritage alive.

Prior to COVID-19, cultural tourism was one of the largest and fastest-developing tourism segments globally, with an estimated four out of ten tourists choosing their destination based on its cultural offering and has a potential to continue growing strongly. With sustainable travel and positive socio-economic impact at their core, community-based tourism is also set to come back strongly. This type of tourism has a potential to regenerate cultural heritage, communities, and degraded ecosystems, and support their recovery.

Looking to the future, destinations should consider investing in authentic cultural experiences, making effective use of new technologies, and creating more targeted cultural tourism marketing campaigns to outperform other destinations and attract more tourists.²⁴

Features of Cultural Tourism include.

- *Heritage and Religious sites* which have special meaning to those connected through common origin and collective beliefs. In the Somali context, there is increasing interest in returning through assisted pilgrimage. Facilitation of access to sites and accommodations that allow the traveler to experience their heritage is a premium.
- *Crafts and Performing Arts* that celebrate local crafts and tie to local culture, engage young and old alike, and provide exposure to choral, dance, and theater performances.
- *Festivals* organized around special occasions or holidays, concerts or performances, in response to cultural heritage and tradition and all manner of celebration.

[24] (<https://wttc.org/Portals/0/Documents/Reports/2021/Investing%20in%20Travel%20and%20Tourism%20100921.pdf?ver=2021-09-16-112521-367>)

2.3.4 Somali Historical Sites²⁵

Countries are defined best by their culture, unique and reflective of its people, history, and region. Experiencing a country's cuisine, its traditions, historical sites, seeing its art, strolling through the town square and special gardens is how one discovers a country. That is what cultural tourism is all about.

According to the Secretary-General of the World Tourism Organization (UNWTO), "Culture is one of the driving forces for the growth of tourism" and this is demonstrated by statistics that best – cultural tourism in the world represents nearly 37% of the total for the sector.

Cultural tourism can span many topics and is as diverse as cultures themselves, the peculiarities, activities, and geography of a country, region, or city. It can include such interests as nature, folklore, architecture, gastronomy, language, art, cinema, sport, and religion. Among the most common sites visited by cultural tourists however are historical sites.

Somalia is rich in regional and national historical and tourist sites, some blend in to the daily routine perhaps not well known for their significance, while others are more prominent and clear in their importance. These are lists of regional historical and tourist sites in Banadir region, then a list of those broadly Somali listed in North and South.

[25] https://en.wikipedia.org/wiki/Tourism_in_Somali

Table 4 - Banaadir Region Historical & Tourist Sites

#	SITE NAME	Region	District	Natural / Man Made	Description
1	Ahmed Gurey Statue	Banaadir	Hodan	Man Made	Freedom Fighter Memorial found at the heart of Mogadishu in K4
2	The Tomb of the Unknown Soldier	Banaadir	Boondheere	Man Made	Memorial to those who fought and lost their lives defending the country
3	Hamar-weyne Old City	Banaadir	Hamar-weyne	Man Made	The oldest district with Islamic architecture dating back over four centuries.
4	Dhgax Tuur (The Stone-Throwing)	Banaadir	Waberi	Man Made	A monument for the protestors who threw stones at colonizers, depicting the struggle for independence.
5	National Museum of Somali	Banaadir	Warta Nabada	Man Made	The Somali National Museum displaying important cultural artifacts.
6	Arba'a Rukun Mosque	Banaadir	Hamar-weyne	Man Made	Built circa 667, the oldest Masjid (Mosque) in Mogadishu
7	Abdul-aziz Mosque	Banaadir	Abdul-aziz	Man Made	The first Masjid built in Somali by the Ottomans in 1500.
8	Sayyid Mohamed Abdullahi Hassan	Banaadir	Warta Nabada	Man Made	Monument to the freedom fighter and leader of the Dervish movement who lead anticolonial campaigns in the late 1800s and early 1900s
9	National Theatre of Somali	Banaadir	Warta Nabada	Man Made	Built in 1967 in Mogadishu, the National Theatre is an important cultural landmark and center for the performing arts.
10	Hawo Tako Statue	Banaadir	Hamar-weyne	Man Made	Monument to the fallen Somali women freedom fighter and member of SYL who fought armed with a sword and a stone.
11	Lido Beach	Banaadir	Abdul-aziz	Natural	A natural beach on the Indian Ocean and the most popular beach in Somali. Located in the middle of Mogadishu it hosts many tourist activities and restaurants.
12	Uruba Beach and Lighthouse	Banaadir	Shingani	Natural	Uruba Beach is in Mogadishu and is the site of the old lighthouse. Also home to the famous Uruba beach hotel.
13	Dar Es Salaam Garden	Banaadir	Dar Es Salaam	Man Made	The largest garden with full play ground facilities at Dar El Salaam Village 8KM from Mogadishu town.
14	Peace Garden	Banaadir	Waberi	Man Made	The first garden established at the heart of Mogadishu with easy access for families.
15	Banadir Garden	Banaadir	Hodan	Man Made	The Most popular garden for youth, families and has many entertainment activities.

Table 5- Somali Historical Sites - NORTH

Somali Historical Sites - North	
Aluula	Former capital of the Majeerteen Sultanate (Migiurtinia).
Bargal	Former seasonal capital of the Majeerteen Sultanate. Features the ruins of one of the castles of King Osman Mahamuud.
Bosaso	The Periplus of the Erythraean Sea indicates that ancient Greek merchants sailed to Bosaso, providing notes about the strategic and geographical location of the current Bosaso area, which was known as Mosylonin ancient times. The towns environs such as Biyo Kulule and Bacaad as well as Karin which Italians had second largest base in Somali soil all are artifacts sites [12]
Damo	The likely “Market and Cape of Spices” described in the Periplus of the Erythraean Sea .
Dhambalin	Archaeological site in northern Somalia, with rock art in the Ethiopian-Arabian style showing early evidence of animal domestication.
Eyl	Site of many historical artefacts and structures. Served as a base for the Dervish forces, with several Dhulbahante garesas remaining from this period. Also includes some colonial edifices built by the Italians.
Hafun	Site of an ancient necropolis.
Haylaan	Site of numerous ancient ruins and buildings. Includes the tombs of Sheikh Darod and his wife Dobira.
Laas Gaal	Complex of caves in northwestern Somalia containing some of the earliest known rock art in the region. Its cave paintings have been estimated to date back between 9,000-3,000 BCE.
Las Khorey	Former capital of the Warsangali Sultanate. Is the seat of the Sultan’s former two-storey palace, a fortress, and a number of other historic ruins.
Maydh	Site of an ancient port city in the Sanaag region of Somalia. Includes the tomb of Sheikh Isaaq.
Qa’ableh	Old town with a number of ancient burial structures. Believed to harbor the tombs of former kings from early periods of Somali history. Includes the tomb of Sheikh Harti.
Qombo’ul	Historic town in the Sanaag region. Sites include ancient ruins, buildings and structures.
Taleh	Former capital of the Dervish State. Features the largest Dhulbahante garesa complex.
Zeila	The commercial port of Avalites in antiquity, and the first capital of the medieval Adal Sultanate.

Table 6 - Somali Historical Sites - SOUTH

Somali Historical Sites - South	
Afgooye	Former capital of the Geledi Sultanate.
Barawa	An important medieval trading city.
Gondal	An historic settlement in southern Somalia. The site of ancient ruins, it is considered a predecessor of Kismayo.
Gondershe	Medieval stone city built on an oasis featuring coral stone houses, fortifications, tombs and mosques. Location of the film <i>La Conchiglia</i> (1992) shot by the award-winning Somali director Abdulkadir Ahmed Said.
Hannassa	Historic town built on a promontory. Features pillar tombs, old houses with archways and courtyards, and a mosque with a well-preserved mihrab overlooking the Indian Ocean.
Hobyo	Former capital of the Sultanate of Hobyo.
Kismayo	Site of ruins of the Geledi Sultanate and other kingdoms.
Luuq	A town in the southwestern Gedo province of Somalia. It is one of the older settlements in the area.
Merca	An ancient port city in the southern Lower Shebelle (Shabellaha Hoose) region of Somalia.
Mogadishu	Former capital of the Sultanate of Mogadishu. Likely coextensive with the ancient port of Sarapion, as described by Ptolemy.
Nimmo	An historical town located south of Mogadishu, it consists of ruined stone houses and mosques.
Warsheikh	One of the principal settlements of the Sultanate of Mogadishu during the Middle Ages.

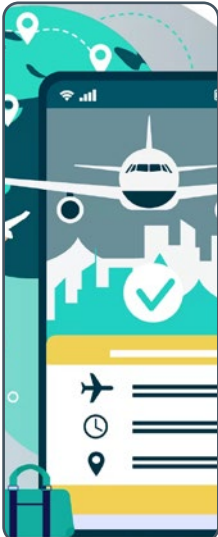
Chapter 3: Priority Tourism & Hospitality Sub-Sector Attributes & Invest Opportunities

3.1 Tour Services

Tour services typically refer to the provision of services in travel, transportation, accommodation, meals and drinks, entertainment, information, guide services or other services to meet the needs of tourists. Tour services can range from independent solo tours, and group or packaged tours. Custom tours include the features sought by the customer, while the package tour is a collection of services sold together at one price e.g., transport, tickets, and accommodation. Packaged tours are most common arranged by tour operators and usually involve trained guides or tour escorts. The pricing varies according to several factors i.e., duration, distance, destinations, demand, season of the year and number of travelers.

The pandemic has resulted in the acceleration of digital transformation and technology adoption throughout the tourism value chain, affecting jobs and skills in the sector. Public and private stakeholders have embraced innovation as a means of adapting to and coping with the effects.

Sector Attributes Tour Services



High number of returning diaspora eager to engage culture.

Changing lifestyles with increased availability for leisure time

Officials promote campaigns to increase tourism.

Increasing demand for 'guided' tourism to cultural sites.

Robust vibrant business community traveling city to city for business tourism.

International arrivals need introduction to local attractions.

Increased population with higher disposable income

Investment Opportunities in Tour Services

- 1 Establish professional guide services.
- 2 Provide travel booking services.
- 3 Retail sales at tourism destinations
- 4 Visa facilitation services
- 5 Specialty vehicle leasing
- 6 Private transport
- 7 Digital marketing services to tour and hotel owners.
- 8 Mobile catering services

3.2 Convention Centers

A Convention Center is a large building designed to hold groups and individuals who gather in convention to promote and share common interests. Convention centers typically offer sufficient space to accommodate several thousand attendees. Very large venues, suitable for major trade shows, are sometimes referred to as exhibition halls. Convention centers typically have at least one auditorium and may also contain concert halls, lecture halls, meeting rooms, and conference rooms. Some large resort and business hotels include a convention center.

Hotels that include their own convention space in addition to accommodation and other related facilities, are commonly known as convention hotels. Meeting facilities without lodging are commonly located adjacent to or near accommodations. Convention and meeting facilities designed to hold large numbers of people can exist alone (e.g., stadiums, arenas, parks, etc.) or within other structures (e.g., university lecture halls, museums, theaters), such as the Somali National Theater, and National Museum.

Sector Attributes Conference and Convention Centers



Investment Opportunities Conference and Convention Centers

- 1 Group transportation and logistics services
- 2 Provide communications services to memorialize events (i.e., social media, communications, photography)
- 3 Specially construction of modern convention facilities
- 4 Event planning and management services
- 5 Staging equipment/sound/seating and management services
- 6 Event promotion and communications services
- 7 Mobile catering services

3.3 Hotel Accommodations; Airport, Business, and Resort

3.3.1 Airport Hotel

The obvious difference between a normal hotel and an airport hotel is that airport hotels offer accommodations in and around the airport terminal, either on the airport's property or a few kilometers away but linked by airport shuttle services.

These are the features that make an airport hotel different.

- **Target customers** include airline passengers who have overnight or short stay overs or experience flight cancellations, and business clients, airline staff and any travelers who have business near the airport.
- **Customer charges** are handled differently. Many airport hotels will often charge guests hourly instead of daily or nightly charges, as stays can be quite brief.
- **Location** is key as they are conveniently in the airport or just off the terminal with shuttle services.
- **Highly Functional** in design and often do not focus on added aesthetic qualities or lend themselves to deep relaxation. Because they are in or near the airport, they suffer from aircraft noise and the hustle of activity from travelers.
- **Designs are Restricted** since they are near flight paths, they must fit into the architectural limitations of the airport construction, therefore their freedom of design is narrow with most attention to function.



3.3.2 Business Hotel

Business is one of the oldest forms of tourism and perhaps the most common purpose for most stays in and around metro centers. A good business hotel ensures that their guests can enjoy their stay stress free while working due to their convenient locations, top of class services, and access to the latest technology.

These are the features that make an excellent business hotel.

- **Proximity to the business hub** or the location is a key consideration since proximity limits time committed to travel and increases time to be productive. Locations that are near public transport, within the city limits and near restaurants, activities, and conference or convention centers are the most popular due to their one stop access.
- **Working space** is key because productivity is the point of business travel. An effective working space includes a comfortable, well-lit desk with convenient access to an ample amount of power outlets, free and fast, reliable Wi-Fi, and a business center access where one can print or prepare presentations around the clock.
- **Technology** is no longer an option; it is the foundation business is built on. Reliable WiFi and strong cellular networks are how we remain connected and without it, access to critical data is lost. Quality business hotels ensure excellent connectivity as well as business tech features for print and production of presentations.
- **Conference rooms and communal spaces** are critical since business is all about meetings, presentations, and entertaining – not noise, interruptions, and apologies to business guests. Business travelers favor hotels that offer communal spaces like open flowing and extended lobbies, coffee shops, conference rooms and even board rooms for more formal convenings.
- **Concierge and in room services** to address daily needs such as laundry or room service dining are key as business travelers often need to be flexible when they break for meals or freshly pressed in a suit for an important presentation. The Concierge is a business traveler's link to local information and key to do more than just book a reservation or arrange a taxi. A quality Concierge makes sure you have directions and best recommendations.
- **Healthy dining options** are a challenge when you are traveling away from home. Business travel can be stressful since there are demanding business routines, and stopping to dine is often the only break. A good business hotel offers a quality breakfast with lots of fruits, fresh juices, and a wide selection of breakfast items. A good cup of coffee and specialty teas or other hot drinks are part of a daily routine.
- **Fitness Centre** in addition to healthy dining options, is a way to reduce stress and bring back focus. A business traveler can reduce jet lag with a workout and take a break from their busy schedule.

3.3.3 Resort Hotel

Travel for leisure, luxury and relaxation is most often directed toward stays at a Resort Hotel. Known for their unique and often pristine natural locations, full-service accommodations and amenities, these hotels attract both visiting tourists as well as business conferences and offer more than just convenience. These hotels can be configured as major conference center hotels, destination hotels, and destination resorts.

These are the features that are associated with a Resort hotel.

- ***Distinctive Architecture*** may be used to further emphasize the local natural surroundings or theme of the resort hotel. Beach hotels are all about bringing the ocean views and sandy beaches right to the guest. The destination could feature historic accommodation tuned to bring the guest in touch with local culture, a popular focus of returning Somali diaspora who wish to reconnect with their roots.
- ***Prime Locations*** are a must since most guests use the Resort hotel as a destination. The prime location offers guests access to natural beauty or quick access to activities. usually located in places frequented for relaxation or recreation, such as beaches, seashores, scenic or historic areas, golf, sea diving, and spas.
- ***Destination Oriented*** and focused on serving their guests many needs, many resort hotels are a self-contained establishment, providing for most of a vacationer's needs while remaining on the premises such as lodging, food, drink, sport, entertainment, or shopping.

**Sector Attributes in Airport, Businesses and
Resort Hotels**



**Investment Opportunities in Airport,
Business, and Resort Hotels**

- 1 Specialty hotel architectural design and planning services
- 2 Specialty Engineering and Construction services
- 3 Provision of outsourced ancillary services on contract to address guest convenience.
- 4 Souvenir/ convenience retail services
- 5 Staffed and self-serve business centers
- 6 Custom tour desk/concierge services
- 7 Event management services
- 8 Custom cuisine catering for specialty events
- 9 Professional audio/visual services
- 10 Hotel operation management services
- 11 Contract Human Resources management and training services
- 12 Contract laundry and cleaning services

3.4 Extended Stay Hotels and Serviced Apartments

An extended stay hotel or serviced apartment offers long term accommodation with amenities such as self-serve laundry and in-suite kitchens, and the features of a regular apartment. They appeal to many travelers who have long stays because they're a cost-effective and convenient alternative to renting a traditional apartment. Rates are usually more affordable since the longer stay allows the property to charge discounted rates. The home-away-from-home arrangement leads many to refer to them as apartment hotels or serviced apartments.

In Somalia, the Extended Stay and Serviced Apartment is a favorite of many NGOs and International business firms and many properties market themselves directly to such clients through all-inclusive packages, full board and half board options, as well as bed and breakfast.

Extended stay hotels range in price and style, just like regular hotels. Depending on the features, number of bedrooms, more square footage, and special amenities such as private patios. They also offer amenities you'd expect to find in a regular hotel, including daily room service, though many properties limit the amount of daily service to limit the costs and pass on discounts. The major difference between an extended stay and other hotels is the price, what guests are billed for, and the different lifestyle often associated with each property type.

Extended stay hotels typically include:


1. In-room Wi-Fi and high-speed internet access.
2. In room TV with entertainment channels
3. Local transportation on demand.
4. On-site laundry.
5. Full function kitchens with appliances
6. Drinking water.
7. Recreational facilities such as gym or pool.
8. Conference rooms and business centers with printer access.
9. Takeaway breakfast items, snacks, and vending machines.

They may also offer parking spaces, and a grocery or convenience store on site. Luxury extended stay hotels may also include lounges, movie theaters, security, and 24/7 guest services.

The average extended stay or serviced apartment occupant at a mid-range property travel for work and needs the convenience of home without the commitment of a second mortgage or lease. They are often attracted to the option to cook in their own private kitchen and hotel-related perks.

Business guests visiting from elsewhere are often given per diem or stipend pay for lodging, transport, and/or food. You may also find couples on long retreats, retirees, and families in transition. Extended stay hotels really do attract people from all walks of life.

Sector Attributes in Extended Stay and Serviced Apartments

<p>Extended stay commitments by semi-permanent tenants stabilize cash flow.</p>	<p>Satisfied guests are more apt to pay a premium rate for home like accommodations such as kitchen, laundry, common spaces for leisure and private quiet workspaces.</p>	<p>Daily service overhead costs decrease when guest assumes own cleaning and laundry.</p>
<p>Extended stay model can scale quickly and economically through retrofit of existing apartment structures.</p>		<p>More resilient model to move quickly 'up and down the food chain' as the market evolves,</p>
<p>Greater flexibility to shift the business model to semi-permanent housing in a market downturn, and flex back to hosting workers when market improves.</p>	<p>Long term foreign business interests prefer the 'set conditions and fees' of an apartment like stay without the permanence of a long-term lease.</p>	<p>Extended stay model is unassuming and less dependent on rapid turnover, reducing overhead of promotional and advertising costs.</p>

Investment Opportunities in Extended Stay Hotels

- 1** Real Estate design and development of Extended Stay custom build or retrofits
- 2** Outsourced operations management services to partner with real estate development/owners.
- 3** On call delivery of meals, laundry or other custom convenience services
- 4** Transport car hire services for guests
- 5** Outsourced repair and maintenance services for facilities
- 6** On call wellness/Spa and Beauty/Barber services

3.5 Food & Beverage Services

The Food and Beverage (F&B) services can be defined as the process of preparing, presenting, and serving food and beverages to customers. The F&B sector is typically a lucrative profit center within the hospitality sector, with increased emphasis when catering business meetings, personal and social events, and large groups gathering for conferences and events. The focus is customer satisfaction, and their focus is in support of their host venue, if that is a hotel, stand-alone restaurant site, or personal catering off site at the customers premises.

The types of F&B can be broken down into two types, On Premise – which just as it says, is prepared on site where the customer visits to dine in an atmosphere well equipped and finished to attract customers such as a restaurant, beverage bar, or fast-food site. The other type is Off Premise – which includes at least partial cooking, prep, and service at the customers premises. This is the choice when someone is hosting a major event, gathering and there is a call to serve many customers.

Types of F&B operations include, Commercial – which the case when the F&B is the primary business of the establishment. Found in hotels, restaurants, lounges, cafeterias, clubs, bars, and sporting venues. Non-Commercial – where the F&B is a secondary or supplemental business, or an alliance with the main business. These F&B operations mainly cater to their consumers with limited choices of menu due to their less commercial focus. Much of this F&B is done under contract for example for schools, hospitals, workplace lunchrooms and such.

Then what is the difference from F&B and Catering? Catering is typically where the business provides F&B to people at a remote location. It is part of the F&B sector, but usually it is in the business of taking prepared items to location for example to host weddings, graduations, religious or conference events. Mostly catering is associated with specialty cuisine and is targeted.

What about the differences in restaurant types? There are two main categories, Quick Serve Restaurants (QSR) and Full-Service Restaurants. QSR is just as it says fast service where the food is prepared, purchased, and generally consumed on site or take out quickly after purchase. Their primary focus is on convenience, affordability, and predictable menu items. In a FSR the object of the business is fine dining, family, specialty, ethnic/international, or themed restaurants. The quality expectations of customers are usually quite high, and the menus are wide to appeal to many tastes. Their premium is on the satisfaction and experience of the customer, where return business and word of mouth advertising is the draw.

Sector Attributes - Food and Beverage Services

<p>Low saturation of quality full-service dining options in most urban hubs in Somalia</p>	<p>High demand for 'experience' dining aligned with cultural tourism, local cuisine, theme-based entertainment, and events.</p>	<p>Discriminating consumers are increasingly demanding of consistent, quality, and unique cuisine and reward positive dining experiences.</p>
<p>Relatively few offerings with clean, consistent, fast fresh and friendly service</p>		<p>Employer friendly workforce climate and moderate costs for local produce and proteins</p>
<p>Increased tourism of all kinds demand food and beverage services that meet international standards for cleanliness, food handling and quality.</p>		<p>High demand for event catering</p>

Investment Opportunities in Food and Beverage Services

- | | | |
|----|---|---|
| 1 | Full-service concepts dine in restaurants | ● |
| 2 | Custom design, decor, and remodeling services for dining establishments | ● |
| 3 | Fresh produce, proteins, food supply and distribution | ● |
| 4 | Custom coffee, juice, and beverage services | ● |
| 5 | Outsource fresh pastries and bakeries outlets. | ● |
| 6 | Restaurant/Kitchen Equipment's service and supply | ● |
| 7 | Custom catering services | ● |
| 8 | Event planning and tents hire, seating etc. for pop-up dining. | ● |
| 9 | Sales and marketing /promotional materials and services | ● |
| 10 | Bookkeeping and business office management services | ● |

3.6 Tourism and Hospitality Technical Training and Education Services:

The tourism and hospitality sector are human resource intensive, making human capital the backbone of the sector's growth and more critical in many ways than the financial capital. Targeted investment in hospitality and tourism sector based technical, vocational, and training services will provide the critical base to improve competitiveness and efficiencies in private businesses and put workers into a sector where upward moving career paths can reward a person's own human capital of developed skills and professional performance.

Through the course of conducting this study, interviews with business owners and workers alike underscored one of their biggest challenges are identifying existing skilled workers for their operations, and the lack of accessible technical and training programs for workers to attend on their own. The result is increased costs for owners to create the ability to self-train or recruitment with incentives for workers from higher paying markets. Across the board, when surveying the Somali market, a discernible gap exists in the form of manpower skills needed to match this growing segment. As is the case in all demand driven business models, where there is a market weakness in a product or service in high demand, there is a fantastic business investment opportunity to step up and meet that demand.

The sector must also focus on attracting and retaining new talent by improving the perception of Travel & Tourism jobs as a career choice. Employers should showcase the diversity of roles that cater for a wide range of skills. They should also promote the scope for career progression within Travel & Tourism. This could be achieved through awareness campaigns and career path mapping exercises. Furthermore, stakeholders should highlight the opportunities that Travel & Tourism provides to female and minority workers. Undertaking these measures are equally necessary to minimize the loss of experienced staff who are quality assets to a business.²⁶

There is little doubt that an effective and complete technical/training of both industry standard technical skills coupled with the critical interpersonal soft skills are essential to unlock the potential of these sectors.

Desired skills and characteristics of successful hospitality employees

- Positive attitude
- Dedication
- Communication and language skills
- Leadership skills
- Organization skills
- Problem solving skills
- Interpersonal skills
- Tech savvy
- Cultural awareness
- Resourcefulness

[26] WTTC Staff Shortages Brief – August 2022

<https://wtcc.org/Portals/0/Documents/Reports/2022/WTTC-Staff%20Shortages-August22.pdf>

Sector Attributes - Tourism and Hospitality Technical Training and Educational Services



Investment Opportunities in Tourism and Hospitality Technical Training and Educational Services

- 1 Establish specialty technical and vocational training and certification schools or programs.
- 2 Outreach training services and on-site in-service assessments of training needs
- 3 Digital resource development for virtual training or employee management services
- 4 Advisory services to hotel chain or association members to establish in house training and certification programs.
- 5 Employee leasing companies for short-term demand or long term management
- 6 Development and leasing of well-equipped facilities for technical training in the hospitality and food services

Kenya Utalii College

Kenya Utalii College (KUC) is the key training institute for service level staff and operational management. Established in 1975, the main purpose of KUC is to undertake tourism and hospitality training capacity building and related functions for the tourism sector. Estimates are that KUC has trained over 70,000 graduates from around the world who continue to serve in the local and international tourism industry.

The training model provides both theory and practical instruction. The college itself operates a 4 Star Hotel (Utalii Hotel) to provide all forms of practical training in Food and Beverage, Culinary Arts, and housekeeping. The hotel has 56 rooms, conference facilities and 2 full-service restaurants used as a practical training lab and for commercial purposes.

KUC is an IATA approved center of examination and hosts the secretariat of AHTSA (African Hospitality and Tourism] Schools Association) and EUHOFA (European Hospitality association of directors and Principals). The college provides both a one-year certificate and a three-year diploma course/work training and partners with the industry to refresh and update skills for ongoing Inservice (refresher) training and management development programs at no cost as part of capacity development for industry partners.

Coursework KUC offers includes:

- Food and Beverage Operations and Management
- Culinary Arts/ Food Production
- Food and Beverage Cost Control
- Front Office Operations and Management
- Housekeeping and Laundry Operations
- Hotel and Tourism management and operations
- Travel and Tours operations and Techniques

For a service-oriented sector like tourism and hospitality, personalized professional service is increasingly in demand. Studies on Kenya show that destination competitiveness will depend largely on how personalized professional services are delivered. Despite the now many training institutes in Kenya, some do not have the capacity or infrastructure required to impart technical skills and competencies necessary consistently or completely for the sector. In response to this imbalance and resulting inconsistency in the workforce, Kenya has issued a call for standardization of the training curriculum so that other colleges can also produce graduates with standardized competencies the sector requires. In addition, a call for more detailed skills gaps and training needs analysis on existing tourism and hospitality private sector businesses has also been realized. The high level of importance assigned to teaching and training skilled service workers in Kenya sheds light on a critical aspect of how they have developed their tourism and hospitality sectors so effectively.

(Source: Kenya Annual Tourism Sector Performance Report 2022)

The Somali Demand for Skilled Workers in Tourism and Hospitality was echoed throughout the interviews and surveys with Somali stakeholders. Policy makers are aware there is a demand and not enough supply, and private sector actors are too often acting alone to create custom training solutions for common roles within their business. As both a recommendation to Public sector as well as a call to private sector investors, there is a defined need to meet the skilled training and education needs. Utaali college offers one regional example of how a neighbor has stepped up to meet their demand and can serve to inspire a Somali response to similar demands.

Chapter 4: Insights from Key Informants of the Tourism and Hospitality Sector

Through the course of the study, researchers performed key informant interviews with stakeholders to learn about their experience and opinions. A semi structured survey was conducted to learn more about such things as ownership of the business, where the investment capital came from, their workforce, regulations, the pitfalls and challenges, and outlook on the future of the sector.

Interviews took place mostly in person with phone or virtual interviews when circumstances wouldn't allow a face-to-face meeting. Interviews took place with; Hotel owners/Investors and managers, Hospitality workers, Hotel consumers, Travel and tour associations, hotel construction companies, chambers of commerce, government officials, and educational institutions

Priority Investment - Tourism and Hospitality Sector Study - Key Informant Interviews

Government Officials	17
Hotel Owners & Managers	31
Hotel & Hospitality Staff	16
Other: Stand Alone Restaurants, Tour & Travel Agencies/ Associations, Academic/Education, Construction	9
Total	73

CHAPTER 4: INSIGHTS FROM KEY INFORMANTS OF THE TOURISM AND HOSPITALITY SECTOR

Summaries of the Hotels and Stand-Alone Restaurants were collected from sources in each of the regions. Findings are displayed below.

Table 7- Summary of Hotels by Region

Hotels & Hotel Based Restaurants							
Regional States	Hotels Total #	Rooms Total #	Avg. # Rooms per Hotel	Total # Hotel Based Restaurants	Total # Hotel Employees in Region (Inc. REST)	Avg. # Hotel Employees per Hotel	SOURCE*
BANADIR REGION	120	4,100	34	110	4,800	40	Banadir Regional Administration- Tourism Department
SOMALILAND	130	4,550	35	95	3,250	25	Ministry of Information, Culture and Tourism- FGS
PUNTLAND	88	2,900	33	75	2,200	25	Ministry of Commerce and Industry
SOUTH WEST	63	1,575	25	60	1,575	35	Chamber of Commerce & Industry
JUBALAND	27	510	19	17	250	35	Ministry of Information, Culture and Tourism
GALMUDUG	37	655	18	30	259	30	Ministry of Information, Culture and Tourism
HIRSHABELE	32	620	19	32	320	25	Ministry of Information, Culture and Tourism
Totals & Avg. National	497	14,910	26	419	12,214	31	

*Source: Statistics are as reported from the agencies listed either from registers or from the agencies experience and best estimates.

Table 8- Summary of Stand-Alone Restaurants by Region

Stand Alone Restaurants				
Regional States	Total # Stand Alone Restaurants	Total # Stand Alone Restaurant Employees in Region	Average # Employees per Stand Alone Restaurant	SOURCE*
BANADIR REGION	240	8,400	35	Banadir Regional Administration- Tourism Department
SOMALILAND	170	4,250	25	Ministry of Information, Culture and Tourism- FGS
PUNTLAND	150	3,750	25	Ministry of Commerce and Industry
SOUTH WEST	180	3,600	20	Chamber of Commerce & Industry
JUBALAND	31	465	15	Ministry of Information, Culture and Tourism
GALMUDUG	45	900	20	Ministry of Information, Culture and Tourism
HIRSHABELE	40	600	15	Ministry of Information, Culture and Tourism
Totals & Avg. National	856	21,965	22	

*Source: Statistics are as reported from the agencies listed either from registers or from the agencies experience and best estimates.

4.1 Findings from Interviews and Surveys with Stakeholders

OWNERSHIP

Question: Who owns the Business?

By far (70%) the most common form of ownership was a limited partnership between a small group of local Somali investors. The second most common form (20%) was family ownership, and the third most common form (10%) was a single individual owner.

Question: What motivated the owners to enter this business?

The most common answers were motivation to invest now that there is greater security in most parts of Somalia (common across regions), and the lack of local offerings of hotel and other hospitality services. Demand is very high, the movement of people in and around all parts of Somalia – in particular around the regional business hubs and capital cities.

INVESTMENT/CAPITAL

Question: Where did you obtain the initial investment capital?

The most common answer is the capital came directly from the group of investors, or from family and in few cases, it was entirely capitalized by a single party.

Almost all were clear that they had no bank loans or assistance, citing the banks either would not lend to their industry/business, or were requiring too much collateral and the terms of their funds were not reasonable.

Most did not see the local banks as very interested in funding hospitality growth at the time they established their business.

Question: What were the capital requirements to start your business?

While respondents clarified this depends entirely on the size, location, type and other specifics of the business plan, the range of capital needed to establish their business was from a low of USD 300,000 to a high of USD 5,000,000, with most responses between the USD 1.4 – 3 million range.

Question: Would you welcome external investment?

Nearly all (96%) responded they would welcome external (domestic or foreign) investment if the terms and conditions were reasonable.

Many shared they have plans for expansion and would prefer a foreign investor to not only access the capital but also to get 'experience' and training services from an investor who knows the industry.

Question: What Is your experience or expectation in terms of timeline to achieve payback/return-on-investment?

Under half (45%) answered this directly with a timeline, which they qualified depended on so many factors such as size of initial investment, if the capital investments were meant to produce immediate returns or establish a brand, etc. The range of responses was from a low of 2 years, to a high of 10 years, with the average across respondents of 6 years.

Question: What is the average cost of construction to build a hotel?

Construction company respondents indicated it depended entirely on the complexity and size of the plan, the materials, equipment, finishes or other details, therefore only a ballpark could be offered. All construction companies interviewed reported costs as between USD 400 – 500 per sq meter.

Construction companies further shared that their biggest two issues were access to quality and quantities of needed building materials, explaining almost all of what they need is bought from abroad, and the lack of quality building engineers, citing their common approach is to recruit engineers from India, or Kenya due to the lack of local experience.

WORKFORCE

Question: Do you have access to a sufficient workforce?

We have no problem finding workers, but they are mostly unskilled and that is a challenge for us. It costs us to train the workers if it is a technical job, and we do not always have the right training methods, so while we can find workers, finding skilled workers is the biggest challenge. The most experienced staff train the new hired workers.

Question: How do you train your workforce?

The majority (70%) responded that they train their workforce either entirely or mostly in house with more skilled workers doing the instruction. A smaller portion, (approx. 21%) responded that they hired outside trainers to come in and provide specific training in key areas, and the minority (approx. 9%) said the staff had been trained by local hospitality institute SITAH. Managers reported this was among their biggest challenge, as the skilled workers trained at the local institute or to have specialized trainers are desired, but it is costly, or the trained workforce get other jobs too quickly.

REGULATIONS

Question: What are your views on the effectiveness and adequacy of the policy and regulatory framework that governs your sector?

Respondents mostly felt the requirements for business registration, taxes, and understanding their regulations was not a big challenge. Some reported that improvements in the visa process had helped them increase customers since travel was now possible for more foreign visitors.

Concerns were expressed that local investors needed to be treated fairly and that foreign investors shouldn't get benefits greater than locals, but to keep the playing field level.

Greater concerns were expressed about the need to continue improving security and ability for people to move about freely, sharing it hurts business when there is fear of insecurity.

Policy makers and private businesses alike shared a need for a clear tourism and hospitality 'national development strategy', and/or framework to advance growth and organize the sector.

Private actors expressed a desire to be consulted and work more closely with MoICT and regulators to update and improve policy for the sector

Other expressed needs were for policy and regulators to address the cost of doing business, in particular the access and affordability of electricity, saying it is the single biggest problem in operating that affects them.

PITFALLS/CHALLENGES

Question: Looking back, what are the greatest pitfalls having come into the business?

Most responses were around entering the business without any formal training in the sector or experience and having to learn from scratch. There are few local 'institutes' teaching the kind of courses that would prepare me to be a hotel or restaurant owner.

Not understanding the costs of operation, and that electricity cost and availability would be such a big challenge. Customers need electricity for electronics and WI-FI and the costs can be very high for us. This is an area

FUTURE OUTLOOK

Question: What is your opinion on the future potential of the sector?

Almost all respondents expressed optimism and high hopes based on what they see and experience now. The reports are that demand is high and they are expecting it will remain that way.

Question: What is your opinion of more entering into the sector and increased competition?

Responses were mixed, with most sharing that competition is ok, and that it improves the sector overall. The customers are increasingly more demanding, and we must raise our standards if we are to meet their expectations.

Recommendations – Public and Private Sector

<p>To FGS/MoICT</p>	<p>Somalia’s National Parks, Reserves and Wilderness areas: Somalia’s National Parks, reserves and wildlife areas should be re-designated where appropriate to remove ambiguity of status and establish a clear path to protection, management and proper development for conservation and increase responsible eco-tourism. States with no National Parks, reserves and wildlife areas are advised to designate new areas for that purpose.</p>
<p>To FGS/MoICT</p>	<p>National legal and institutional ‘gap analyses of the Tourism and Hospitality Sector: Tourism and Hospitality sector growth is hampered by the absence of a coherent regulatory and institutional framework. Stakeholders interviewed and researchers of this study recommend undertaking a national legal and institutional gap analyses to ascertain the necessary legal, institutional, and regulatory instruments that provide a national framework for the sector growth.</p>
<p>To FGS/MoICT along with Private Sector</p>	<p>Create and publish a Sectoral Strategic Development Plan: As part of developing a national roadmap for the tourism and hospitality sector development, the MoICT needs to create and publish Tourism and Hospitality Sector Strategic Development Plan, made up of short, medium, and long-term objectives. This plan should include a clear call to the private sector, donor, and international communities to contribute best practices and resources as the Federal Government of Somalia (FGS) navigates transformation to a fully developed sector strategic plan.</p>
<p>To FGS/MoICT/Ministry of Environment and Climate Change (MoECC)</p>	<p>Collaboration between MoICT and MoECC: Development of the aforementioned national framework and strategic development plan for tourism and hospitality sector should include strong collaboration of the MoECC as the primary institution driving the national plan to reduce climate risks and enact environmental protections. The MoECC should contribute its guidance on harmonizing new frameworks and strategic plan with the Nationally Determined Contribution (NDC) to the Paris Agreement, as well as the National Adaptation Plan (NAP) meant to reduce vulnerability and strengthen resilience to climate change – including management of natural resources such as water, and overall align efforts with the NDP 9.</p>
<p>To FGS/MoICT and private sector actors</p>	<p>Establish a national approach to provide a teaching and training institute for Tourism and Hospitality Skilled workers: To address the serious gap in locally trained skilled workers to meet the growing tourism and hospitality sector skill demand, the FGS needs to dedicate resources and establish a plan for Public Private Partnership (PPP) to create a national training institute, in similar fashion to regional centers of excellence known for their teaching, training and certification of skilled workers.</p>
<p>To FGS/MoCI/MoICT and private sector actors</p>	<p>Organize and formalize Private Sector Associations in Tourism and Hospitality sub-sectors: As private sector actors know the demands of the market and what is needed to grow the tourism and hospitality sector, FGS needs to facilitate the establishment of cooperatives, associations, or other forms of Private Sector Organizations (PSOs), in each sub-sector area, to give voice and advocacy relative to their sub-sector focus, and act as private sector partner to FGS/MoCI as the national frameworks and national strategies are developed and enacted.</p>

4.2 Quotes from Stakeholders

“Our investments decisions were backed by a thorough feasibility study, looking at the trends and identifying market gaps. We considered demand for hospitality services overall, with increased return of diasporas, increased international airlines and growth in domestic air carriers, and the improved business reforms. For all reasons, business to family, people are coming to Mogadishu. The demand for hospitality and related services is on the rise and we are sure it will continue to increase, thus our huge confidence in this business and market.”

The architectural design of our next hotel project incorporates a fusion of traditional and modern influences, combining classic with comfort. It's my passion and pride to contribute to the aesthetic beauty of our capital city, incorporating comfort, safety and security, and international standards.”

Osman Bashir, Peace Group MD

“It's my endeavor that Jazeera Palace hotel is the best business hotel in Mogadishu through professional service and product quality. To keep up with and exceed the value we offer over our competitors, we are planning to undertake some major renovations for the hotel as well as review our brand standards to remain committed to constant enhancement of our operational excellence. With the governments continued efforts to improve business reforms, the hospitality sector in Somalia is destined for continued growth and success”

Abdulkareem Siyad GMD, Jazeera Hotel

“Our commitment to excellence and to exceed customer expectations demands we work closely with our suppliers to source highest-quality and fresh ingredients. Our teams are trained to adhere to standards built around rigorous quality management systems to ensure that our ingredients, food handling, sanitation, and catering practices are halal and consistently meet or exceed industry standards”.

Managing Director - Pescatore Restaurant

“As founders of Martisoor Hotel, we see the rapidly increasing amount of local investment in and around Garowe. Our research and experience tell us this growth can only attract increasingly larger number of visitors with the resources to spend not only on their actual stay in the hotel, but also spend in local shops and dining. They are coming to stay, and they are coming to invest.

The primary goal of Martisoor Hotel is to make the travelers experience of the Puntland capital comfortable, convenient, and seamless, in a space that is safe and secure. Travelers are more likely to visit and re-visit a destination if they know that their end-to-end journey will be simple, convenient, and secure.”

Abdi Isse - Cofounder Martisoor Hotel

“Owners and managers in the hospitality and tourism industry face real challenges in recruiting, developing, and maintaining well trained, skilled workers since much of the training falls to themselves. It is improving, as workers begin at one hotel and move to others, but as a total workforce we need to greatly increase our focused on offering a high end, quality 'product' to meet the increasing demands of the discerning customer. Talent shortages one of the major challenges in the sector”.

Director - Travel and Tour Association

“The business environment has completely changed in the last 10 yrs. There are major investors who have financed international hotels who are now entering the market. We want to have foreign investment; however, the government must be sure to provide a level playing ground for investors both local and international”.

Managing Director, Mogadishu Business Hotel

Chapter 5: Case Studies of Successful Hospitality Investments

5.1 Tour Services

5.1.1 CASE STUDY – Tour in Somalia



Tour in Somalia is a licensed travel and tour agency which started as a YouTube channel in 2021 then registered as a company in 2022 to become an operating Tour Agency in Mogadishu.

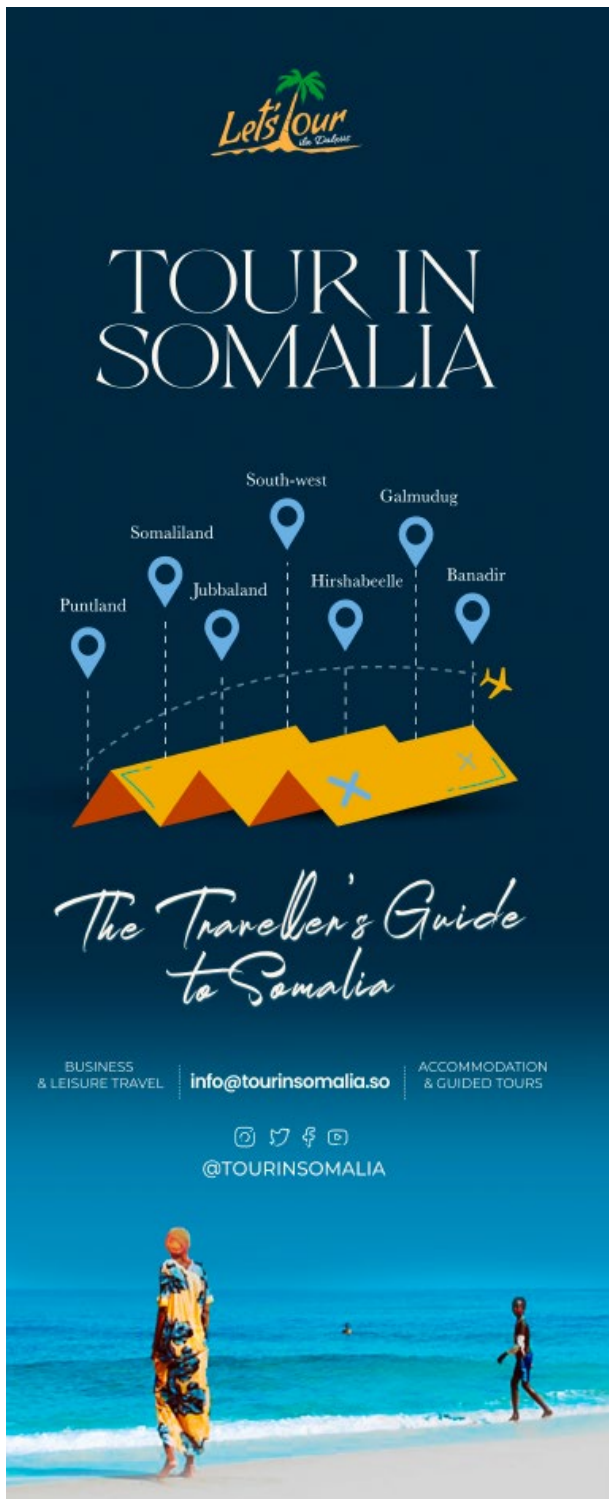
Their purpose was to attract a community of travelers who are just as curious and determined to tour in Somalia as the founder Miss Nada Sayid Ahmed who is the managing director and owner.

Miss Nada, who is a Saudi born graduate with a degree in Travel and Tourism from Malaysia, runs the agency which also employs two other staff, a photo/videographer and a sales and marketing. Tour in Somalia have expanded its portfolio of travel destinations by researching and documenting each site's unique features in video that is hosted on their YouTube channel and weekly Vlogs. They offer a variety of travel packages for individuals, groups, and company events, including:



- African Safari Packages
- Corporate, Business, & Group Travel
- Urban and Rural Accommodations in Somalia
- And customized packages according to interest.

As the current target market are mainly domestic and Diaspora Somalis, the focus of their tours is mainly domestic, visiting historical sites, frequenting restaurants known for exploring specialty Somali/Ethiopian/Asian cuisine and cultural dances /musical experiences. Other highlights are adventure tours, religious sites, camel firms, and nature discovery tours.



Miss Nada's love of her beautiful country and passion for experiencing it is on full display on her YouTube Channel, which was inspired after many years of staying outside.

Some of Tour in Somalia's Travel episodes include:

- Exploring Old Town Mogadishu
- The Dream Life of Somalia's Green Farm- In the city of Afgooye - a gorgeous farmland city near Mogadishu
- Trying Camel Milk for the First Time – In Baidoa (Janay) - a city southwest of Mogadishu 240km

Why choose Tour in Somalia as your agency? Because Tour in Somalia travel agents are acknowledged as among the most experienced in Somalia when it comes to custom planning one-of-a-kind vacations and destinations certain to be an unforgettable experience at reasonable prices.

- Professional service and practical experience on the destination as guide by experts
- Quality and experiential itineraries that covers gastronomy, cultural and Nature/Adventure based.
- Excellent Customer service

Nada asserts this is a very personalized business that requires study and expertise on the history of the region. Her immediate plans are to develop stronger offerings of two packages within Africa in addition to the domestic tours, as a growth strategy. She is open to expanding her business and ready to take good partners to invest and partner in the expansion of the company.

Contacts for Tour in Somalia

Email : tourinsomalia@gmail.com

<https://www.facebook.com/tourinsomalia/>

<https://www.instagram.com/tourinsomalia/>

<https://www.youtube.com/@tourinsomalia297>

5.2 Business Hotels & Conference Centers

5.2.1 CASE STUDY: The Martisoor Hotel, Garowe, Somalia



About Martisoor Hotel: Martisoor (meaning a great hospitality in Somali Language) is a four-star hotel built in Garowe, the capital city of the Puntland State of Somalia in 2019. The hotel comprises three adjoining main buildings, a mosque for prayers, gazebos, outdoor patios, a car park, offices, and a large unused land property.

The first building is built for accommodations consisting of 75 rooms (including VIP suites), an executive boardroom, cafeteria, and a restaurant for in-suite dining for the hotel guests. The second building houses a separate restaurant and cafeteria for the public, two VIP lounges for private dining, a gymnasium, and a barbershop. The third building is the conferencing building with five halls of different sizes.

Martisoor Hotel is well suited for business travelers in Garowe, as it is situated on a unique location on the Government Estate Road which links the city of Garowe, many of the government ministries and headquarters of international organizations. Martisoor Hotel is set to engage its customers as one of the finest and exciting hospitality experiences in Somalia.

Martisoor Hotel is a luxurious four-star hotel located in Garowe, Puntland State of Somalia. The hotel was built with the aim of providing premium accommodation for both business and leisure travelers. With 75 spacious and modern rooms and suites, the hotel offers guests a comfortable and relaxing stay experience. The hotel is owned by a prominent businessperson who recognized the need for a world-class hotel in the city.

Martisoor Hotel is uniquely designed and fitted with state-of-the-art amenities to cater to the needs of its guests. The hotel features facilities for conferences, workshops, and seminars, with different halls accommodating up to 300 people. Guests can enjoy a wide variety of African and Continental Cuisines at the Martisoor Restaurant, Terrace Cafeteria, and Martisoor Garden.

Background: In 1998, the State of Puntland was established as a federal state, with the city Garowe as its capital. Since then, the region has experienced increased stability and rapid economic growth adding roads, airports, and regional port infrastructures. As the employment rates and income levels in Puntland have steadily increased, so has the demand for improved living standards, accommodations, and conveniences from locals as well as economic growth, increased interest and improved trade relations, an increasingly steady stream of visitors have come to Garowe, and accordingly, the need for luxury hotels and restaurants has dramatically increased.

The primary goal of Martisoor Hotel is to make the experience of travelers to the Puntland capital conveniently seamless, while safe and secure.

CHAPTER 5: CASE STUDIES OF SUCCESSFUL HOSPITALITY INVESTMENTS

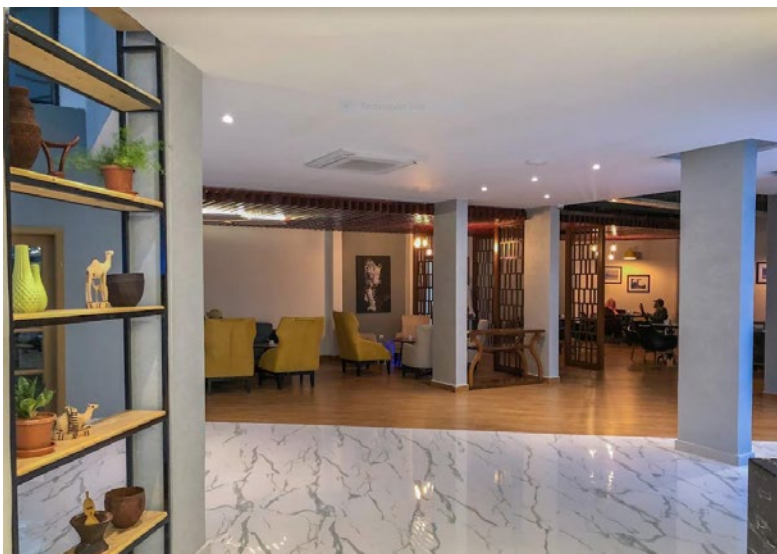


the premier provider of hotel, conference, and restaurant services as they recognized the demand for the hospitality and tourism services sector were soaring. The experience of the investment group identified a burgeoning demand of people traveling, both domestic and international, for leisure, social or business purposes and this demand includes Somalis and foreigners alike who increasingly find business, family, or leisure travel to Garowe on their agenda.

Martisoor Hotel sees the rapidly increasing amount of local investment in and around Garowe and intends to attract many visitors with the resources to spend not only on their actual stay in the hotel, but also come to invest in local businesses. The Martisoor Hotel prides itself as a local job creator, directly and indirectly through the knock-on effect it creates for higher demand of related services such as transport, dining, retail sales and business services.

Travelers are more likely to visit, and re-visit, a destination if they know that their end-to-end journey will be simple, convenient, and secure.

Investment: The Martisoor Hotel secured its investment capital from Somalis from the diaspora partnering with local entrepreneurs. Collectively, the Martisoor investment group made a strategic decision to be



For more information,

visit the hotel's official website at <https://martisoorhotel.com/>

or contact them at
Email: admin@martisoorhotel.com

Mobile:
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5.2.2 CASE STUDY: Beder Hotel, Guri'el, Galmudug



Beder Hotel

Beder Hotel Guri'el is a modern and luxurious business hotel located in Guri'el, Galmudug State, Somalia. Offering 46 fully fitted rooms, a coffee shop/bar that serves a wide selection of cocktails and coffee drinks, a full-service restaurant serving local and international cuisines, and conference facilities that can accommodate up to 500 occupants. Beder Hotel Guri'el not only incorporates the city's first hotel-based elevator, they also incorporate cloud-based digital signage, which keeps guests both informed and entertained during their rides.

The Beder Hotel Guri'el is run by a team of 72 staff members with world-class experience in the hospitality sector and a proven managerial experience operating high-volume hospitality businesses. Over the past decade, the company's developed a loyal customer base increasing year over year. The owner's credit effective management and excellent relationships with the business community as essential elements of their success and profitability.

Beder Hotel Guri'el operates as a member of the larger Beder Hotel & Restaurant chain, recognized by its stylish master brand logo, which enhances its overall aesthetic appeal and contemporary style.

Grown from a single branch established in 1999 established in Dhusamareb, the Beder Hotel & Restaurant chain is now a three-hotel chain, adding

this additional property in Guri'el and another in Mogadishu. In each of their locations, Beder Hotels & restaurants provide an ideal place to host dinners, seminars, conferences, and team building activities.

The combination of charm and function offers guests a unique, upscale, and convenient experience. The hotel architecture is a fusion of modern and traditional Somali architecture, creating a uniquely inviting atmosphere for guests. Well-appointed rooms, state-of-the-art amenities, and exceptional services cater to the needs of both business and leisure travelers.

The Hotel & Restaurant chain's facilities are fully equipped to meet clients' requirements and are served with unlimited wireless internet connection. Whether it is a private business meeting or a corporate conference, they offer a variety of venues for all kinds of meetings and banqueting services. Hours of operation are from 8 AM to 11 PM every day of the week.

The Beder Hotel Chain is owned by a local businessman who recognized the unmet demand for quality hotel accommodations. Operated with the belief that service excellence is their key ingredient for the successful management of their business, their proposed expansion provides a solid partnership opportunity to prospective investors in a business with a track record of positive returns on investment. The business is consumer market demand-driven, dealing with basic goods, guaranteeing value and existence in the unforeseeable future.

For More info Contact

+252614596060



5.2.3 CASE STUDY: Jazeera Palace Hotel, Mogadishu



WONDERFUL HOTEL IN THE HEART OF MOGADISHU, SOMALIA



Located just 300m from the Aden Abdulle International Airport, Jazeera Palace Hotel is one of the first Mogadishu landmarks you notice as you leave the airport. In its prime location, Jazeera Palace brings a variety of exceptional hotel services which range from luxury accommodations in their stylish and comfortably furnished rooms, to a fitness center, multi-option conferencing facilities, restaurant and catering, and even houses an international embassy.

A home away from home for travelers on business, diplomats, civil society members or tourists, the aim of Jazeera Palace Hotel is to treat

all guests with the same level of service, setting apart Jazeera Palace as leader in the hospitality sector and champion of the economic and tourism recovery of Somalia. To operate their impressive business, Jazeera Palace employs over 150 staff members, who receive training and ongoing coaching from their department leadership teams, all of which provide friendly, quality, and quick service.

Jazeera Palace Hotel opened its doors in August of 2012 after an intensive 3-year construction period. At that time, the recovery was still in its early stages and Jazeera Palace was the first full design hotel in Mogadishu when there were no proper hotels in Mogadishu, the only offerings were converted residential premises as guest houses or makeshift hotels. Marking its entry as an opening of a new era, Jazeera Palace is not without its challenges.

Room choices range from the top end Presidential suite, fully appointed with sleeping quarters, a working desk area, and comfortable living room with seating for a small group, to Deluxe suites, Deluxe rooms, and Standard rooms. In total, the hotel can house 170 guests in its 95 rooms. The decor echoes the contemporary comfort and modern style of a Somali

residence. The superior rooms at Jazeera feature soft neutrals with designer fabrics, art, and lighting.

Amenities and Services: Dining options at Jazeera Palace offers a choice of its two restaurants which feature a healthy offering of specialty Somali dishes, in addition to continental and mixed international menu. It's safe to say that a very high percentage of locals have enjoyed dining at Jazeera Palace, since the property is also known for hosting scores of conferences, workshops, presentations, and celebrations.

As they offer a choice between 7 conference



spaces ranging in size, layout, and seating arrangements, they are more than adequately prepared to host any form of group event.

The largest hall can accommodate up to 300 guests, the second-largest accommodates 200 guests, another for 150 guests and the smaller two accommodate between 30 to 50 guests.

As the Jazeera Palace hotel is part of a small complex, they are currently constructing a separate conference center that will be able to accommodate up to 500 people with

several smaller breakout rooms and its own complementing restaurant to cater dining for guests attending conferences, trainings, workshops, or corporate events. Conference hall packages include use of their public address systems, LCD projector with screen, stationary for participants and bottled water. All guests enjoy free WIFI, and as an extra service, teleconferencing can be arranged. The repeat business affirms Jazeera Palace has a winning combination which meets and exceeds guests' expectations.

From an interview with the managing director and investor in the hotel, he can attest that the endeavor to build and operate Jazeera Palace has not been without its insecurities, shocks, and setbacks. He and his team set out on a groundbreaking effort to build a popular gathering site to host important convenings that advance all Somali society, reflecting the change afoot in the country. But for detractors wanting to put down and discourage progress, their success brought targeted threats and attacks so prominently covered in news of the region.

Surely, the hotel has suffered losses publicly, though their resolve to continue on and rebuild dwarfs the impact of these losses and have actually served to inspire not only the local Somali community who have rallied to their side, including the countries



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leader, President Hassan Sheikh Mohamud, but the international community alike who came together with Somalis to condemn the violence and rally around the rebuild - much to the cheers and support of his countrymen.

He asserts, as a sign of growth, the business environment has become more competitive over the past 10 yrs., and he is very optimistic



that as the business environment in Somalia continues to embrace an ever more level playing field for investors, both local and international, his business will thrive. His strategic approach is to invest in his teams, increasing skills and professionalism. Attracting top experts in his business. Beyond that, they are planning to engage in some renovations and review how their brand standards are keeping up with the expectations of the market.

With the government's continued efforts around business reforms, and the rapid growth Somalia is experiencing, the hospitality sector in Somalia is destined for bigger growth and success. It's the right time for conscious consideration of the needs within the sector and ensure the sector is properly regulated and the right policy frameworks are developed.

CONTACT INFORMATION

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5.2.4 CASE STUDY: Maamuus Hotel, Kismayo



Maamuus Garden Hotel located in Kismayo, Jubaland state is a 30-guest room property with coffee shop and restaurant as well as conference halls. The property was initially a youth center with sporting facilities, library and cafeteria but has been converted into a complete modern hotel offering top rate accommodations and dining.

A model of success when it comes to public - private partnerships, the property stands out in Kismayo.





Opened in 2009, the operator and investor decided to develop the facilities to host large events for social and business groups and today serves as the go to venue for weddings, social gatherings, and business conferences or workshops.

Known for its large outdoor seating area equipped with private gazebos for small groups, and open seating for a spot to take tea and socialize, guests are quick to recommend the beautiful gardens and open seating areas. But the beauty of the outdoor space is not all it provides; your stay will also be complimented through regularly hosted evening activities including local entertainment and sports activities and football pitch that attracts a good mix of customers.

- Maamuus Garden Hotel features
- Newly renovated Superior conference rooms
- Newly renovated hotel rooms for comfort and style
- A large outdoor seating garden with calming ambience
- Superior customer service
- In-house Prayer points

“Guests dine, take afternoon tea, relax and enjoy the ambience of the outdoor seating”.

Maamus employs a team of 64 staff, which provides the highest in customer service and security. A local job creator known for how well it treats its employees, the team makes each guest feel right at home and safe throughout their stay. The hotel itself is nestled within a secured

perimeter compound manned by 24 hour professional and armed security guards trained in the latest security protocols and enforcing strict entry rules.

As part of the Maamus commitment to ever improving guest stays at its hotel, the company provides ongoing training of its staff who are primarily local and reliable. Walking into a room may leave you impressed with its decor and comfort, but it's the warm and

respectful interactions with staff that really make you appreciate Maamus as the best area choice for your overnight or event.

You can never go wrong staying at Maamus Garden Hotel and Inn.

Contact Information:

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7G7, Kismayo, Somalia

Phone: +252 61 290952

5.2.5 CASE STUDY: Horyaal Hotel, Baidoa, Southwest State



One of the standout features of Horyaal Hotel that makes it stand out from the crowd is its expansive garden area, which includes space to picnic, entertainment options for families, playgrounds for children, and recreational activities for the youth. The garden also offers a magical view of the nearby Baidoa City Park, providing guests with an oasis of tranquility amidst the bustling city.

Horyaal Hotel, located in the heart of Baidoa, among the most upscale hotels in one of the most populated cities in Somalia. As the first of its kind, standard hotel in the city, Horyaal offers guests a satisfying experience that combines luxury with the warmth of Somali hospitality.

Upon arrival, guests are greeted by friendly staff who are passionate about providing exceptional service. The hotel's energy-saving access cards make check-in and check-out a breeze, while also reducing the hotel's carbon footprint.

In addition to its luxurious accommodations with 46 different types of rooms and 6 main conference halls, Horyaal Hotel is the hub for international and local NGO meetings, retreats, and



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conferences. The hotel's conference facilities are top-notch, and the owners have expanded conference hall space to another property facing the hotel to accommodate even larger events. The hotel rooms themselves are tastefully decorated, with all the modern amenities guests would expect, including air conditioning, free Wi-Fi, flat-screen TVs, and plush bedding.

The hotel's on-site restaurant serves up delicious meals throughout the day, while the cafeteria offers a variety of juices, cocktails, and drinks in a relaxing atmosphere.

As one of the first who paved the way in Baidoa, since Horyaal Hotel was established, it encouraged many Somali businessmen and women to invest in hotels and restaurants themselves within the Southwest business community, leading the way for better service to meet demands, and matching the growth of the city, creating good jobs for many young people.

Horyaal hotel is an excellent choice for anyone visiting Baidoa, Somalia. With its luxurious accommodations, friendly staff, and commitment to sustainability, it's the perfect place to stay whether you're in town for business or leisure.

CONTACT INFORMATION

Horyaal Hotel

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5.2.6 CASE STUDY: National Theatre, Mogadishu

THE SOMALI NATIONAL THEATRE

As a vital cultural and arts center that has played a significant role in promoting and preserving Somali culture and heritage since its establishment in 1967, the Somali National Theatre is known and beloved by all.



As a symbol of the country's vibrant cultural and artistic heritage, the Somali National Theatre has been the primary platform for emerging artists to showcase



their talent. Initially constructed with the support of the Republic of China, it served as an entertainment hub hosting various events including live music such as vocal and band performances, Somali theater

dramatic productions, and popular competitions for the country's most talented singers.

As a result of the country's instability in the 1990s, the National Theatre ceased to operate. But as conditions began to improve, the longing to renew this critical cultural center, in 2019, the Somali

government and the Somali business community collaborated to renovate critical public properties, and the National Theatre along with the National Library and Museum, and the statues of the country's heroes and freedom fighters. Since the Theatre's reopening in 2019 it has been the site of several public as well as private events,

attracting thousands of people from across the country.

The Theatre's General Manager and Deputy Manager lead a large team of over 200 employees in the day-to-day operations of the Theatre that are spread amongst the Theatre's four operational departments, including Management and Human Resource department, Commercial and Marketing Department, Cultural Department, and Art department.

Preservation and celebration of the Somali cultural heritage is a key aim of the Cultural department of the Somali National Theatre. Much of their ongoing effort focuses on promoting and preserving Somali

culture and heritage by organizing cultural events, festivals, and workshops to educate and train young people on the importance of their cultural identity. Additionally, the Art department provides training and mentorship programs to young and aspiring



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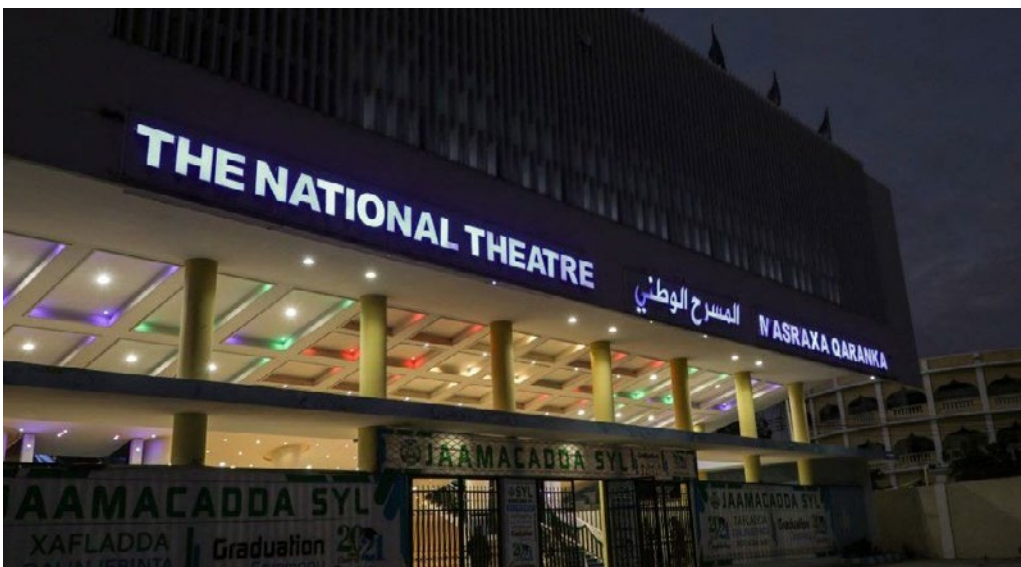
E: national.theatre@moi.gov.so

W: www.moi.gov.so

FB: [https://www.facebook.com/
GolahaMurtidaS/](https://www.facebook.com/GolahaMurtidaS/)

artists, helping them to develop their artistic skills and talents.

The Somali National Theatre's reopening has been a catalyst for Somalia's economic growth, attracting local and international investors to explore new business opportunities. With the growing demand for high-quality conference facilities, the Theatre provides a unique opportunity for investors to invest in the country's hospitality industry. The Theatre's rehabilitation, along with other



public properties such as the National Library and Museum, signals the government's commitment to investing in the country's cultural and artistic heritage.

CONTACT INFORMATION:

Somali National Theatre

5.3 Airport Hotels & Specialty Hotels

5.3.1 CASE STUDY: Airport Hotel, Mogadishu



Airport Hotel and Conference was established in 2017 as a premium business hotel and conference center targeting groups seeking one location to stay, work and host meetings all under one roof. Located in the secure green zone area of Aden Adde International Airport Mogadishu, Airport Hotel and Conference provides comfortable, luxurious, and secure accommodation for business travelers with amenities that would please the most discerning leisure travelers.

The hotel is equipped with 62 fully furnished rooms built for comfort with all the modern conveniences, and for those who seek even more comfort during their stay, the hotel also offers well equipped VIP Villas with top-notch amenities to pamper their guests.

The health-conscious traveler need not interrupt their exercise routine, as the

hotel also provides access to its well-equipped gym with workout space and weight equipment.

In addition, the hotel has full conference venues equipped with modern amenities such as audio-visual equipment, Wi-Fi, projector screens, and multiple conference spaces with state-of-the-art audio/visual equipment are available to reserve by guests and outside customers alike. The conference hall also has several meeting rooms that can be used for smaller meetings or private events. A perfect space to host meetings, workshops, banquets, and events, the guests will enjoy the fine cuisine prepared in the on-premises restaurant, offering local and international dishes alike.

Airport Hotel and Conference is a secure, comfortable, and reliable facility for both business travelers and conference attendees. We offer dedicated 24-hour security, which is certified by the United Nations Department of Safety and Security (UNDSS). Our location makes us an ideal hub for conferences, especially those from the UN community. With our exceptional service, we guarantee that you will have a great experience at the Airport Hotel and Conference.



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CONTACT DETAILS

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5.3.2 CASE STUDY: Palm Business Park, Mogadishu



The Palm Business Park (PBP) premium development is strategically located along the Airport Road, on prime land in Mogadishu City. Having commenced operations in 2015, PBP is a mixed-use development, composed of short and

medium term residential / hotel, conference center and offices, all of which is carefully master planned to ensure that each phase complements the others and expansion plans follow a sustainable, eco-sensitive design.

Owned by the UNIGATE Business Group, the hotel offers 54 rooms, 3 conference spaces and 2 restaurants.

Staffed by 74 quality trained employees, PBP maintains an in-house training model based on best practices and incentivizing excellence in guest services. Proof of their success shows in their clients who include international and local investors and business leaders, diplomats and embassies, the international donor community including long term agreements with United Nations agencies, as well as development aid implementing agencies, NGOs, and international travelers.

The location is ideal as it provides the best of security as it is located just 150 meters outside the Medina Gate at Mogadishu's Aden Adde International Airport (AAIA) within the Green Zone where most UN, International Donor organizations, embassies and contractors are located. However, as there is also entry just outside the AAIA gate, security sensitive access is much more reasonable for local Somali visitors since it does not require full entry into the AAIA area.

With a premium on security, service and guest comfort, the hotel is not open to the public and does not accept walk in bookings. Guests must be part of an organization able to establish a service contract whereby the organization can be vetted, and security ensured, and arrangements made to fit the service need. An additional feature to boost security is an active security 'protocol' which is shared with guests so they are aware of procedures should there be an emergency event, and a fully secure 'safe room' that is secure and protective from any sort of incoming threat.

Various stay packages are offered based on the needs of the guests including all-inclusive full board, half board, and bed and breakfast. Overall, the business is set to be a long-medium term stay residential hotel.

Premium Service Includes

- Assisted facilitation of entry permits and Visa arrangements.
- Meet and greet at AAIA.

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- Airport pick up and drop off.
- Conference rooms and meeting rooms for reservation at a separate fee.
- Professional security escort with access to both Armored (hard skin) and soft skin vehicles.
- Fully equipped and secure safe room
- On site laundry services.
- Fitness Center
- Two restaurants and optional room service
- On site mosque/prayer facilities

Rooms: The rooms at PBP are modern and spacious, relaxing, with premium quality beddings, work desk and seating. Each room is equipped with a flat screen TV and satellite programming feed, safety deposit box, and comfortable, clean, and stylish bathroom and shower facilities. The rooftop deck offers a view of Mogadishu that is breathtaking, and getting to the view is just a matter of a quick elevator ride to the roof.

The gardens surrounding the hotel and facilities are lush, green, tropical, and quickly draw you into their serene vacation-like feel. Many of the rooms have views toward the ocean which is just the opposite side of the airport runway, and the conference centers are a short walk around the hotel to the conference center area.

Dining: The food quality is controlled by the on-premises chef and by all accounts the cuisine is fantastic. Guests rave at how flavorful and fresh each meal is. Served buffet style for all guests to enjoy at set times, the highlight of the day is mealtime. For those wishing to have a cook to order menu, there are two restaurants on site which offer a light room service and rooftop dining menu, as well guests can enjoy coffee, espresso, tea and hot drinks as well as juices and soft drinks at the rooftop bar.

Conferencing Facilities: PBP boasts of spacious and fully equipped conference facilities with high-speed internet. Large, medium, and small conference spaces are available at either one of the conference center meeting spaces adjacent to the hotel, or the relaxing roof top conference space which also has a view from seating outside when your group needs a tea break. The location will transport your miles away as such a peaceful environment with the great view of the Indian ocean and AAIA. The conference center can be booked by outside guests who wish to hold conferences, workshops, business events of all kinds and personal celebrations, though advance booking and strict security protocols are required with pre-approved guest lists and proof of identity and security screening before entry.

Palm Business Park is a hotel that has created its own category for comfort, security, and convenience. Its guests swear by it and highly recommend its excellent experience to all who stay.



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5.3.3 CASE STUDY: Peace Hotel Group, Mogadishu Peace Business Group of Hotels



PEACE BUSINESS GROUP



Peace Business Group of Hotels is perhaps one of the more well-known hotel groups outside of Somalia due to the stories from foreign journalists and development professionals who used the Peace Group accommodations and security services during earlier years when few other hotels or security services were functioning. Peace Hotels are still a preferred residence for journalists, filmmakers, and photographers. Clients include staff from the BBC, HBO, and the New York Times. Reporters of every medium leverage our location as a regular meeting place for national and international government officials, activists, and Somali influencers to deepen their coverage of the country.

Built by Mr. Bashir Osman, Managing Director of PHG, a renowned Somali entrepreneur who lived in Mogadishu throughout the civil war. PHG has invested in the Mogadishu hospitality sector after conducting a thorough feasibility study noticing

market gaps ripe to be addressed. With the increase of international airlines and local aviation growth, there will be a growing demand for hospitality services.

As a Somali owned and registered company incorporated in 2005, the operations of Peace Business Group have expanded over time to three separate hotels and conference facilities within Mogadishu. Peace hotels are known first and foremost for their serious commitment to security with high end comfort. PBG combines traditional Somali architecture with modern comforts and conveniences, such as on-site dining in its restaurant with a menu spanning a variety of international and local cuisine, access to working spaces and small meeting rooms for consultations, and in room Wi-Fi and cable entertainment systems.

The original hotel setup in Mogadishu was influenced by Turkish and Arabic architectural designs, and



the new project will have an inspired international architectural design with an African look and feel. The three properties are known as Peace One Hotel, Peace Two Hotel, and Peace Three Hotel.

Peace One is the flagship hotel, located just outside Mogadishu International Airport, between the shores of the Indian Ocean and Mogadishu town center. This hotel opened in 2009 and features 50 standard rooms and 10 suites. Five (5) halls, four (4) office spaces, and four (4) dining areas are available

for events of varying sizes. Situated not far from the Indian Ocean with breathtaking views from its rooftop patio. The courtyards are lined with sensational gardens, indigenous trees and outdoor seating to dine or hold meetings. Inside the secure perimeter, there are ample parking spaces for visiting delegations transport vehicles to stand by.

Peace Two, is located at Mogadishu's busiest intersection in Waberi District, next to Hormuud Tower. This location offers a central location for travellers who want to be in the heart of the action. Built in 2011, this hotel features 35 rooms, including three (3) suites, and a generously sized restaurant that can accommodate up to 100 people.

Peace 3 is the closest Peace property to Villa Somalia, the Presidential Palace and the seat of the government, this hotel is designed for travellers meeting with government Officials. This location opened in 2013. The white Italian architecture contrasts with daring midnight blue windows to make Peace Three a striking boutique space. It consists of 16 rooms including two suites with Wi-Fi and central air conditioning - International conference and social events centres.



Peace Business Group is a hybrid business that combines hospitality with premier security operations. The company offers end-to-end operational security and support services to clients, including ten international NGOs and other international organisations. The majority of PBG workforce are local and bring with them a deep understanding of the local security concerns, demands, current happenings in the diplomatic and

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vehicle fully equipped as standard: PPE - Trauma Medical Packs, Vehicle Tracking, and VHF Communications.

Meetings and conferences are a specialty of PBG, offering among the largest conference and event spaces in Mogadishu, a proven track record in hosting high-profile events such as the IGAD summit, in state-of-the-art facilities and a dedicated team of event planners, Peace Hotels can cater to any type of event, small to large-scale conferences and exhibitions. The hotel's conference and event spaces are outfitted with modern audio-visual equipment, high-speed internet connectivity, and comfortable seating arrangements. In addition, the hotels' catering team can provide a wide range of cuisine to suit any palate. Whether you are looking to host a corporate meeting, a training workshop, or a social event, Peace Business Group of Hotels is the perfect choice for your needs.



political and political level, as well as deep appreciation for the local culture and social environment. For these reasons, PBG has an ability to tap its extensive network of well-sourced local contacts and provides senior governmental and security agency access on the regional and national level.

On the security side alone, PBG has a force of 250 security professionals, most of whom are Somali nationals, trained and mentored by expatriate risk management experts. The staff consultants have proven and respected experience in the Somali private risk management sector and have achieved broad-based support and consensus across the users of its services in the NGO, international media, and business communities. PBG hosts a comprehensive fleet of mixed security vehicles including Toyota Land cruiser VX B6 Armored, Toyota Land cruiser VX B7 Armored, Toyota Land cruiser 70 Series B6 Armored, and Toyota Land cruiser 70 Series Soft skins. Each



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Guest support services include 24/7 accessibility to aid with anything guests may need, including: Airport pick-up and drop-off services, car rental/transport services, tour and excursion bookings, laundry and dry-cleaning services, currency exchange, business center services, printing, scanning, and copying, high-speed Wi-Fi throughout, room service during restaurant hours, and prayer mats as well as LCD TVs in each room.

So, what's next for PBG? The latest project under development is a brand new 5-star 192 room Hotel with serviced apartments. The new property will house 5 different meeting rooms with a capacity of 500 pax, 200, 150, 50 and 20, a rooftop Restaurant, Gym, 2 prayer rooms(male/female) and 174 underground parking spaces. The rooms inventory will include 2 presidential suites and 6 ministerial suites. an executive lounge for resident VIPS with satellite kitchens and service crew.

With its range of services, the Peace Business Group offers a comprehensive solution for the major needs of its customers, and does so in a comforting, secure and inviting location.



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5.4 Resort Hotels & Extended Stay

5.4.1 CASE STUDY: Future Beach Resort – Grand Beach Hotel and Resort, Kismayo

GRAND BEACH HOTEL AND RESORT KISMAYO



(Est. completion - early 2024)

As the vision of the first 5-star beach resort in Kismayo, the Grand Beach Hotel is currently under construction and located on the beaches of beautiful Kismayo. Once completed, this prime location is sure to become a destination of choice for holiday and business travelers from across the country.

Anticipated to open its doors in early 2024, the computer-generated rendering illustrates the high-end luxury resort. As this beach hotel and resort property enters its final stages of construction, attention is shifting to address the final fittings, fixtures, décor and installing all manner of equipment.

The hotel's 50 luxurious rooms will be a mix of Deluxe suites, family suites, and standard rooms.



Hotel features are to include.



Grand Beach Hotel and Resort under construction (February 2022)

- 50 luxurious rooms – Deluxe & Family Suites and Standard Rooms
- Two coffee shops
- Conference halls
- Two covered swimming pools – one each for exclusive use of men and one for women
- Rooftop Lounge area.
- Separate Gyms and
- Outdoor garden seating and dining areas.
- A pool restaurant and Mocktail Bar.

The placement of the hotel provides a majestic view standing above the seashores, providing most rooms beautiful views of the waves and sunsets across the horizon.

Completion of the property is heavily anticipated throughout Kismayo city, igniting a buzz of excitement as once operation, the Grand Beach Hotel Kismayo will surely contribute greatly to local employment and be a draw to the city boosting the socio-economic activities in the entire region.

Plan your vacation get away to Kismayo today!

5.4.2 CASE STUDY: Cadman Hotels-Beledweyne



CADMAN HOTELS-BELEDWEYNE

Cadman Hotels (Beledweyne) is a bed and breakfast hotel in the heart of Beledweyne District, Hiiraan Region, Hirshabelle State of Somalia. Established in 2021 by local investors to serve greater clientele as the hotel aims is to serve business, non-governmental and the general public clientele seeking accommodation, conference and social events. The hotel has an ample parking, free Wi-Fi, cafeteria, laundry as well as room services.

The hotel has 24 fully equipped, ultramodern and luxurious rooms with a coffee shop and conference facilities. The hotel rooms include Deluxe, Single, and twin-bedded rooms, making the facility comfortable in any of its serene, spacious guest rooms.

The hotel provides conferencing, wedding and honeymoon service as well provide local tour packages including the river & farmland visits and tourism attractions such as the Hadrawi footsteps.

The hotel has more than 10 staff working in various hotel departments with training to meet international standards, and experience both in the hospitality and business management aspects. This commitment to international standards and convenience reflects in its marketing and outreach campaign as the hotel can be booked directly through its website www.cadmanhotels.com, and is also listed on popular booking and BnB web platforms which provides greater connectivity between global travellers and the property.

From design, the investors backing Cadman Hotels stressed the importance of building to the highest standards and the result is a property in compliance with all relevant public health guidelines,

building codes, fire codes and any other existing regulatory instructions relating to the operation of hotel service providers. Guest remark the hotel offers clean, comfort and calm environment. Management is trained to adhere to high standards in terms of personal appearance and how they present themselves to the guest, as well as conscientious attention to guest service, conducting business practices in an ethical and responsive way.



CHAPTER 5: CASE STUDIES OF SUCCESSFUL HOSPITALITY INVESTMENTS



Contact Details:

CADMAN HOTEL

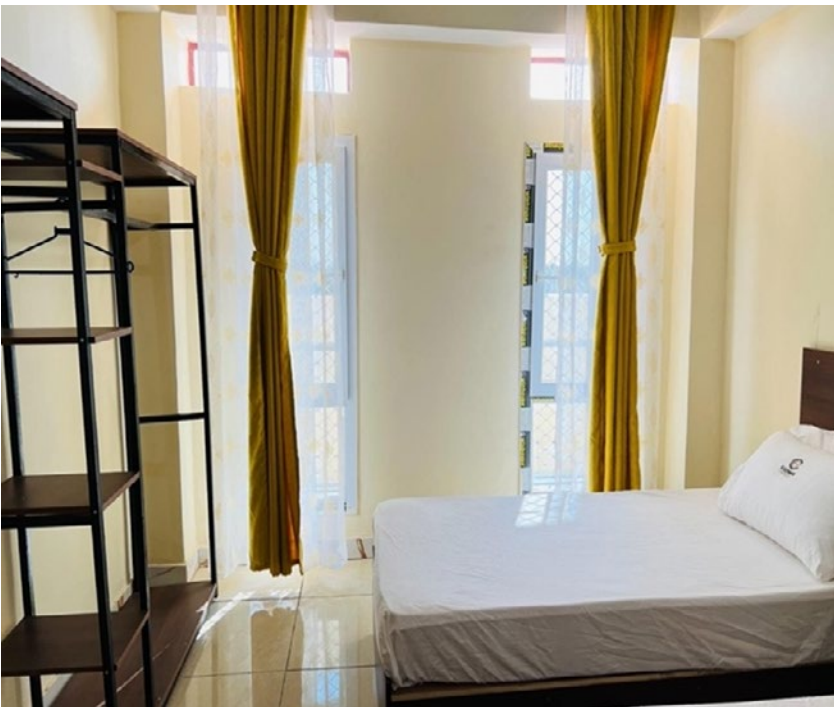
Cento Quindici Road, Beledweyn,
Somalia.

Phone: +252 611 630 355

Email: Info@Cadmanhotels.com

Website: www.cadmanhotels.com

The investors in Cadman hotel have found success in this first venture and soon determined an expansion plan would be their next step. They have already acquired property in Kismayo as a next phase, and plan to expand its footprint across Somalia providing accommodations with world class standard services and quality.



5.5 Food & Beverage

5.5.1 CASE STUDY: Karmel Restaurants, Mogadishu

KARMEL CHAIN RESTAURANTS



Deciding it was time to come home, in 2013 the company opened its first location in Somalia at Banadir-Mogadishu, at a time when the country was still in its recovery from a long civil war and one could hardly find dining out options, let alone a quality food establishment in the country. The timing was right, and the experience of the brothers came through. Karmel soon had a reputation as a local cuisine leader, especially for one special 'best dish of Mogadishu' much appreciated by Somalis, their pizza. The need for more locations was once again clear, and



Karmel Chain of Restaurants is a well-respected and well-known success story in the Somali food and hospitality industry. First established in Minneapolis, Minnesota in 1999 by the Warsame brothers, the restaurant specialized in traditional Somali dishes as well as limited international fare. For the many Somali Diaspora of the Minneapolis area, Karmel quickly became an iconic restaurant for those craving their traditional Somali dishes, and curious locals who were unfamiliar with Somali cuisine but willing to try - soon to become repeat customers. As the restaurant grew in popularity, the brothers knew they had a hit with diaspora and locals, and opened two additional locations, restaurants with one in Dubai and the other in Nairobi, both of which became a quick success as the original

their branches grow with the latest branch at KM4 -Mogadishu

As Karmel Chain Restaurants became famous for their gourmet food and attractive yet cozy atmosphere for upscale clientele, they increased their menu to be sure they offered what the diner wanted.

The restaurant serves light dishes such as Pizzas, Shawarmas, Philly steak sandwiches, as well as local traditional dishes prepared in modern style with affordable prices. The secret to the success of introducing additional dishes is maintaining that high standard and dedication to the quality of the kitchen, and consistently bringing it into each of its additional locations.

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In February 2020 the restaurant was awarded the best restaurant in Mogadishu by the Ministry of Information, Tourism and Culture. The two Mogadishu branches now employ about 200 staff



and have a capacity of 500 seats between them. Offering dine-in or take-out and delivery, the options do not stop there. The restaurant also provides banquet halls for special events such as weddings, seminars, corporate events, and other ceremonies.

Having enjoyed steady growth, the company continues to scout for new locations and has its eye on the Lido beach area, as well as a location at the

Aden Adde International Airport. As far as the cuisine goes, the company is working to add seafood dishes such as lobster and shrimps to its menu soon.

The Karmel Chain Restaurants success has customers traveling from all corners of Mogadishu for friendly customer care and consistently top quality for decades.



CONTACT DETAILS

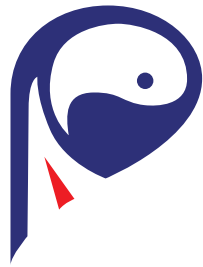
Karmel Restaurant (in Karmel Hotel)

Phone: 619888877 / 616662991

Facebook: <https://www.facebook.com/karmelrestaurant/>



5.5.2 CASE STUDY: Pescatore Seafood Restaurants, Mogadishu



PESCATORE

THE SEAFOOD RESTAURANT



Founded in 1977 by Mr. Abdi Egal at the well-known Lido beach in Mogadishu, Pescatore Seafood Restaurants is a testament to the power of perseverance and commitment to excellence. Immediately upon opening, Pescatore was a hit developing an immediately following by providing top quality seafood prepared in a kitchen managed and staffed with two professional Italian chefs while their wives attended to customers as waitresses until 1982, when the operations were leased to a Somali hotelier from 1982 to 1991.

Sadly, as conflict and civil war escalated in the early 1990's, Pescatore discontinued service and the restaurant remained dormant for three decades. However, the owners of Pescatore owners never gave up on the memory of the original success, instead planning around a new vision of reopening and did so after updating the restaurant with a classic interior design and all new looks. Staffed by 40 well trained restaurant staff consisting of domestic and international team members, Pescatore reopened for full service in February 2022.

The beautiful decor and service of Pescatore raised the bar for all competition in the seafood dining business. They've done so through instilling core values based on excellence in customer service, food knowledge, highly motivated personnel, and fixed on retaining long term customers through delightful service, attention to detail, their passion for creating high-quality, delicious food, and their unwavering commitment to customer satisfaction.

At Pescatore, every customer is treated like royalty, where staff put the needs and preferences of customers at the forefront of each interaction.

Pescatore's commitment to constant improvement drives them to work closely with their suppliers to source high-quality and innovative ingredients. Their teams are trained to adhere to standards built around rigorous quality management systems to ensure that the food handling, sanitation, and catering practices are halal and meet or exceed industry standards.

Pescatore Seafood Restaurants is a true gem in the Mogadishu restaurant sector. Since its inception over four



decades ago, to its rebirth after rebuilding from the conflict surrounding its location, it came right back with its same trademark feature of excellent service and the adoration of a loyal customer base that continues to grow, Pescatore is poised to continue transforming the industry for many years to come.



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5.6 Tourism and Hospitality Technical Training and Education Services

5.6.1 CASE STUDY: Somali Institute of Tourism & Hospitality, Mogadishu



SITAH
SOMALI INSTITUTE OF TOURISM AND HOSPITALITY
Endless Opportunities

Somali Institute of Tourism & Hospitality (SITAH)



tunities within the hospitality sector, with 95% of them currently working in the field throughout Somalia.

SITAH's long-term goal is to establish its own center, with the necessary space and equipment to produce professionally well-trained wait staff for Somalia and beyond. This vision is an ambitious but necessary step if Somalia is to realize its full potential in the Tourism and Hospitality industry, much the same way that the Utalii College, established by the Swiss government in Kenya in 1975, became a leading institution for hospitality workers in Africa.

The Somali Institute of Tourism and Hospitality (SITAH) was established in 2015 by a group of young professionals with backgrounds in Tourism, Hospitality, and Technical and Vocational Education and Training (TVET). The first of its kind in Somalia, and the only training institution of its kind ever created, registered, and recognized by the ministry of education. The institute was created, believing the industry had been neglected for far too long. Some of the founders were committed to the point of pursuing graduate degrees in the trade and continue promoting the Tourism and Hospitality sector in Somalia.

Despite the challenges an underdeveloped hospitality and tourism culture presents, SITAH has successfully prepared a mix of nearly 350 young boys and girls as graduates prepared to accept oppor-

Beyond the investment of its founders, SITAH has partnered with organizations to strengthen its offerings, such as the USAID funded GEEL project which was focused on the development of Somali youth. Through key technical and investment support, this partnership enabled SITAH to improve its offerings and expand its reach, strengthening the skilled work staff offered to the tourism and hospitality in Somalia.

One of the major opportunities SITAH has recognized, is the awakening of the Somali consumer to higher levels of service in its dining and hotel stay services. This growing demand for well-trained quality workers elevates the importance of the need for technical training services for the Tourism and Hospitality sector in Somalia. While the sector is still in its relative rebirth and has not been given the

CHAPTER 5: CASE STUDIES OF SUCCESSFUL HOSPITALITY INVESTMENTS

attention it deserves, the potential to generate significant revenue and create jobs is immense.

SITAH Institute is poised to be the leader in Somalia as this awakening takes place, providing high quality education and training to young Somalis in Tourism and Hospitality. SITAH's long-term vision for the industry is one that is worth supporting and investing in, as it has the potential to generate significant revenue and create job opportunities for young people in Somalia.



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6. Resources for Starting a Business in Somalia

How do I register a business in Somalia?

Somalia's investment permit application process is straightforward, requiring just a few steps:

1. Visit the SomInvest website and fill out the FDIApplication Form.
2. Business registration: The foreign investor must register their business with the Registrar of companies at the Ministry of Commerce and Industry.
Visit: <https://ebusiness.gov.so/>
3. Notarize the Memorandum of Association. In Somalia, foreign investors can incorporate a company having a sole director, and register a wholly-owned local company, without having to have a local shareholder.
4. Obtain a business licence from the relevant Ministry. For more information:
Visit: sominvest@mop.gov.so
5. TIN Certificate (get a Tax Identification Number). For more information:
Visit: sominvest@mop.gov.so

To improve the ease of doing business, the government has radically reformed the business registration process. The Somali Business Registration and Licensing System (SBRL) has recently been developed by the Ministry of Commerce and Industry, which has overall responsibility for business registration.

The SBRS has reduced the business registration period from months to just about three days.

Visit: <https://ebusiness.gov.so/>



Key Government Contacts

Government Agencies	Roles	Contacts
Ministry of Information, Culture & Tourism Department of Tourism	The department oversees promoting and facilitating tourist activities within Somalia. We enable an environment where people can visit and enjoy the diversity of Somalia. Of late Somalia has prioritized the advancement in winning the confidence of tourist to come and explore the ancient history and vast experience.	Ministry of Information, Culture & Tourism Mogadishu, Somalia Info@tourism.gov.so Website: https://tourism.gov.so
Ministry of Commerce and Industry	The Ministry of Commerce and Industry administers two departments, the Department of Commerce and the Department for Promotion of Industry & Internal Trade (formerly the Department of Industrial Policy and Promotion).	P.O. Box 30, Mogadishu, Somalia Website: www.moci.gov.so Email: ministry@moci.gov.so
Somalia Investment Promotion Agency (SOMINVEST)	This body is the national investment promotion agency under the Federal Ministry of Planning Investment and Economic Development	Afgoye Road, KM5, Mogadishu-Somalia Website: https://sominvest.gov.so Email: info@sominvest.gov.so Tel : +25261911153
Somali Chamber of Commerce	The Somali Chamber of Commerce and Industry is a trade organization headquartered in Mogadishu, Somalia. It serves as an umbrella group for the local business community. Membership is also open to international investors. SCCI is a vibrant organization focused on enhancing business opportunities and ensuring that its members take advantage of business opportunities locally, regionally and internationally.	Somali Chamber Building, near Banadir Hotel, Shibis District, Mogadishu, Somalia Telephone:-640560 Fax:-219039 Email: info@somalichamber.so Website: https://somalichamber.so Offices in each regional states
Ministry of Labour and Social Affairs	The Ministry of Labor and Social affairs of the Somali Federal government is mandated to provide policy direction and guidance on all labor administration and vocational training matters. The ministry is also mandated to protect and develop the labor force to contribute to the socio-economic development of the Somali Federal Government	Mogadishu, Somalia +252 61 7889484 Email: dg@molsa.gov.so Website: www.molgov.so
Somali Bureau of Standards (SoBS)	SoBS's mandate covers standardization, metrology, all conformity assessment activities, inspection testing, and certification. It has been given the authority to control product quality and ensure the safety of consumers.	Via Kamalu din, Boondheere District P.O. Box 67, BN03010 Email: info@sobs.gov.so Tel: +252 61 0742473
The Central Bank of Somalia	The Central Bank of Somalia is responsible for formulating monetary policy to achieve and maintain price stability. The Central Bank also promotes financial stability; supervises an effective and efficient payment, clearing and settlement system; formulates and implements foreign exchange policies; holds and manages foreign exchange reserves; issues currency; and is the banker for, adviser to and fiscal agent of the Government.	Website: https://centralbank.gov.so

Chapter 7: Resources to Support Investors; Role of MOICT & SOMINVEST

SomInvest is Somalia's national investment promotion agency under the Federal Ministry of Planning Investment and Economic Development. It is a statutory body established under Article 6 (sections 1-8) of the Foreign Investment Law of 2015, in order to:

- Promote foreign investment
- Rebrand Somalia
- Facilitate investment entry and retention; and
- Continuously advocate for improved investment policies.

The Foreign Investment Law (FIL) 2015 mandates the Somalia Investment Promotion Office (SOMINVEST) to help investors to access the information and application forms that must be submitted and approved by the Foreign Investment Board (FIB). Application forms, and information about the registration process, the visa regime, the tax regime and the labour law can be accessed via this link: sominvest@mop.gov.so

SomInvest focuses on sector-specific investor targeting and the development of new partnerships to enable sustainable investments in Somalia. The main objectives include:

- Promotion of Foreign Direct Investment flows to Somalia.
- Development and maintenance of scientific investment-related data that can aid investors to make intelligent choices when investing in Somalia.
- Establishment of investor outreach platforms and missions to facilitate investor entry.
- Execution of a robust communication strategy to position Somalia as a favourable investment destination.
- Provision of aftercare support and dispute avoidance/resolution mechanisms to improve the investor experience.
- Offer policy advocacy and support across the investment cycle.

Our Vision

To Promote and Sustain Direct Foreign Investment flow to Somalia.

Our Mission

SOMINVEST will endeavour, through the use of cutting-edge technology and strategies, to promote Investment inflow to Somalia; rebrand Somalia; facilitate and support investor entry and retention; and continuously advocate for an investor-friendly ecosystem.

SOMINVEST
WHERE INVESTMENT MEETS OPPORTUNITY | www.sominvest.mop.gov.so

Department Sections

SOMINVEST has the following four essential sections to facilitate the delivery of its mandate through its five (5) year strategic plan (2021-2025):

1. Investment Promotion Section

The investment promotion section is mainly responsible for attracting, promoting and reaching foreign investors by providing the necessary information about Somalia, sectors of interest, and key legislative and institutional arrangements to allow investors to make informed decisions.

2. Investment Facilitation and Support

The Investment Facilitation and Support Section is responsible for investment facilitation and coordination with Government authorities, to ensure that investors are satisfied and are accorded timely government services to enhance their general experience of investing in Somalia.

3. Research and Policy Advocacy Section

The research and Policy Advocacy Section is mainly responsible for providing sectoral and market analysis and designing and preparing bankable projects for FDI. It has the overall lead for reforms in the investment climate.

4. Communications and Brand Somalia Section

The Communications and Brand Somalia Sections are mainly responsible for investor outreach, the brand Somalia initiative, and the organization of successful investment conferences, roadshows and other events that are necessary for the overall attraction, promotion and facilitation of FDI.

Contact Us!

Afgoye Road, KM5, Mogadishu, Somalia

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