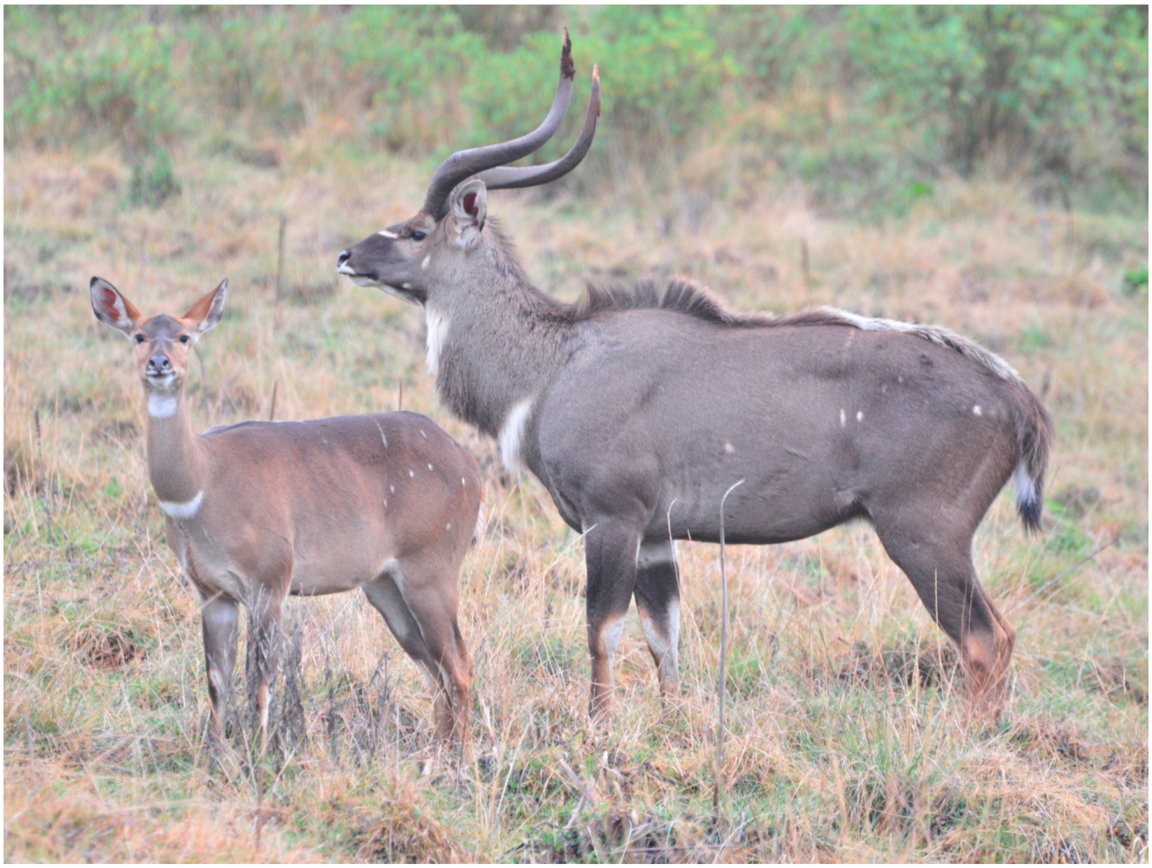
Assessment of Tourist Hunting in Ethiopia



Sustainable Development of the Protected Area System of Ethiopia
SDPASE

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0. Executive Summary

Trophy hunting, when conducted and regulated properly, can help protect valuable wildlife habitat, which otherwise would be encroached by people and livestock.
The trophy hunting industry of Ethiopia is small, but has a great potential to grow. Only around 250 animals are hunted annually (as compared to 1,5 to 2 Million in Germany). A maximum of around 50 hunters book hunts in Ethiopia per year. There is no concern about the biological sustainability of the hunting. This also holds true for the mountain nyala, which has shown stable populations, despite severe habitat loss. Regulations are strictly enforced and quota setting is very conservative.
The number of international hunters has dropped from 57 in 2001 to 28 in 2005. This is reflected in the present quota utilisation figures: quotas given in 2005 could be sold only to 47%. Hunting success is only 75%, despite prepayment of the trophy fees.
Trophy fee income dropped from 949000 USD in 2004 to 684240 in 2005.
This drop coincides with the price increases in 2001 and shows that the increases were not accepted in the market. **These figures are very alarming and EWCA has to take drastic measures to reverse this negative trend.**
Presently the hunting industry has the potential to produce around 4 Million USD of direct income, half to the Government and half to the hunting companies. Multiplier effects provide another half Million USD for the Ethiopian economy. Only around half of it has been realised in 2005, leading to a loss of more than 2 Mil. USD.

Summary of Recommendations:

a. Improved quota setting

Improve quota setting by introducing more scientific methods: Improved monitoring of wildlife populations is necessary to ensure that quotas are on one hand sustainable, on the other hand realistic and economical.
It is recommended to put an ecological monitoring system in place which allows for long term and robust data, for instance based on trophy monitoring, long term observations, hunting success rates and effort needed in hunting, aerial surveys for plains game etc.
To this effect the quota setting procures, indicators used and their cost effectiveness will be reviewed in a consultancy.
It is proposed not to have a quota for kob, given the abundance of the species in Gambella. The same should apply to Salt's dikdik and possibly to other species like common duiker, common bushbuck etc..

b. Utilisation of quotas

Quotas given should be used to the full. Quotas are there to be sold, thus earning money for the Government and communities. Any unsold quota is a loss for the government. **Unsold quotas should therefore be sold before the end of the hunting year to other companies or licensed hunters.** Companies that are not able to sell their quotas should be investigated and consequences like reassignment of blocks should be drawn. In case of unused quotas in the open CHAs, EWCA should be obliged to attempt to sell them to licensed hunters before the end of the season.

c. Allocation of hunting areas

Allocate hunting areas transparently and based on economic principles: The process of allocating hunting concessions should be as transparent as possible, and based on market principles. This could be done by auction or by public tender. It does not necessarily have to be

open world- or Africa-wide. If there is the political will to support the local industry, tenders or auctions could be restricted accordingly.
Some tenders have been launched by regional administrations, but were badly done and without success. It is recommended that EWCA is administering the tendering or auctioning process on behalf of the regions. The tenders should be in the English language to allow international bids.

d. Poaching and encroachment

Do not ask the concessionaires to do the job of the Government (managing the CHAs): Presently concessionaires are obliged to manage the blocks including antipoaching, community relations, social projects etc. Basically it is expected from the concession holder to carry out government functions which are performed in other protected areas by government institutions. Given the low value of some blocks this means to ask too much from these block owners. In addition, often the expertise how to run a protected area is not available with the outfitter. It is therefore proposed not to include the demand to manage the block in the outfitter's contract, except to render assistance in antipoaching/anti-encroachment measures on request. The regions or preferably the local communities should be asked to manage the hunting areas. There is no point in transferring a large portion of the hunting income to them if they are not ready to invest in the management of the hunting areas.

e. New hunting areas

Encourage creation of new hunting areas as community conservation areas where possible: It is recommended to radically increase number and size of the hunting areas. Gambella Regional State has the highest concentrations of antelopes (the kob migration), but presently no active CHA. This deprives the region of much needed wildlife income.
There are areas in Oromia, Southern region, Somali region and Benishangul Gumuz which obviously have good numbers of wildlife, but are not hunted.
These areas should be run as community conservation areas so that a substantial part of the income goes to the communities where the hunting takes place. Potential community conservation areas are often not suitable for photographic tourism, but suited for hunting. Communities should be advised accordingly. There might also be in the future an opportunity to sell live animals to game ranches, the creation of which is Government strategy.

f. Prices and fees

Increase price flexibility, based on willingness to pay: The prices for hunts in Ethiopia are now among the highest in Africa, even though there are no elephant and lion on quota, which are the money spinners in other countries. There has been a big drop in visiting hunters since 2009, with the corresponding loss of income for the nation. In the last year 2005 EC only 28 hunters visited Ethiopia. This is less than half of the 2001 EC figure (57). The drop in hunters since the price increase indicates that the Ethiopian hunting packages cannot presently command such high prices.
Trophy fees should be analysed as to whether they really reflect the willingness to pay of the hunters. For instance oryx could be increased, and Lelwel hartebeest lowered, because hartebeest are generally more widespread and thus cheaper than oryx. Oryx Beisa is a hunting endemic, whereas Lelwel hartebeest can be hunted elsewhere. 4000 for the oryx and 2000 for the hartebeest seem more appropriate than the other way around.
Most hunting clients are concerned that their hunt is conducted in a 'conservation-friendly' manner and would likely select hunting operators with concessions where the money benefits the communities. This could increase the chance for high prices even though it will be difficult to compete in this respect with hunting in southern Africa for instance.

g. Flexible concession fees

Introduce flexible concession fees, based on tender procedures: Concessions have different values. The concession fee is presently composed of a 100,000 Birr flat rate and 5% of the value of the quota. The auctioning/tendering will help determining the economic value of a block and will automatically lead to flexible concession fees. In the meantime it is recommended to skip the 100,000 Birr flat rate and to charge a certain percentage of the quota value as concession fee in a way that it is income-neutral for Government.

h. Resident hunting

Increase resident hunting by opening it in additional states and by introducing new animals: Resident hunting is expensive and thus a potential money spinner for regions and communities. It is recommended to include some other common and obviously abundant species in the huntable species list, like common duiker, bushbuck, and kob.
It is also recommended that regions like Gambella take up resident hunting in order to generate income from their wildlife.
If quota is not used by the hunting companies until 3 months before the end of the season, the animals should be offered to other companies or resident hunters for half the trophy fee (like with the non-quota animals).

i. Pre-payment of trophy fees

Do away with the pre-payment, introduce payment after shooting: Hunters have to pre-pay the trophy fees and there is no refund if the animal is not shot. This is unique in Africa and only to be maintained when the success rate is high and the trophy fee is low in comparison to the total costs of the hunt. This is no longer the case after the recent price increases.
It is strongly recommended to change to the shot/paid system practised elsewhere in Africa. This will have little impact on the income generated, in fact it might lead to a better quota utilisation, because hunters will be tempted to try to hunt a greater variety of game on quota.

j. Minimum hunting days:

Drop the minimum hunting days, leave it to outfitters to maximise the hunting days: The 15 and 21 days respectively prescribed by the guidelines are above the minimum in most of the African countries. It is recommended to drop the minimum altogether or at least introduce special shorter hunts for 7 to 10 days on particular animals like leopard, crocodile, kob, and on common plains game. Hunting package "flat rate" prices should also be envisaged.

1. Introduction

Hunting in Ethiopia has a long tradition. Around 1900 the country was regarded as one of the prime wildlife countries alongside Kenya, Tanganyika, Uganda, and Sudan. Since then the wildlife of the country has experienced serious and partly disastrous declines, but there are also some success-stories, like the recent substantial increase in numbers of Walia ibex and Swayne's hartebeest.
The country harbours species interesting for the discerning, experienced hunter, true endemics like the mountain nyala and the Menelik bushbuck, and "hunting" endemics (species that can only be hunted in Ethiopia, even though they exist elsewhere) like the Beisa oryx, Soemmering's gazelle, Salt's dikdik, white-eared kob, Nile lechwe and others.
Ethiopia's hunting industry is small and it is the author's view that there is a large potential to increase volume and proceeds from the hunting.

In large parts of Africa trophy hunting is a major industry. It creates incentives for wildlife conservation where alternative conservation friendly land use options do not exist.
In Southern Africa the industry is increasing, as well as in Tanzania. Counties like Uganda have opened up their hunting industry in recent years and are becoming attractive hunting destinations.

In Ethiopia the number of visiting hunters is declining and the recent price increases, combined with other factors, unfortunately coincided with the world economic crisis. The price increases have led to a drop in hunters from 57 in 2009 to 28 in 2013.
In a number of the countries the hunting industry is also faced with a series of problems. The problems are similar, like governance problems and the failure to have mechanisms in place to involve and to allocate sufficient benefits to local communities where the hunting takes place Examples are Zambia and Botswana. These problems are not particular to the hunting industry. Not surprisingly the industry reflects the general governance problems existing in these African societies. Like every human activity, hunting can develop best when an appropriate societal and legal framework fosters transparency, good governance and the rule of law.

In this paper the argument will be put forward that the economic motive has to be the main driving force towards sound management and sustainable utilisation of wildlife. It will also be argued that the hunting industry has a potential to make a significant contribution towards the income derived from wildlife areas under pressure from land use incompatible with wildlife, and that it therefore plays an important role in the conservation of wildlife and its habitat.

It is estimated that financial incentives from trophy hunting have the potential to lead to more than doubling the land area across Africa that is used for wildlife conservation, as compared to national parks and reserves alone (Lindsay and all). Trophy hunting creates incentives for wildlife and habitat protection under a diversity of scenarios, from state-owned concessions to communal safari areas like in Namibia and Zambia, areas where local communities live but where wildlife is not necessarily the primary land use, to private game ranching operations.

This was confirmed in a recent project conducted by the James Hutton Institute, Aberdeen and the Frankfurt Zoological Society. In the report it is stated that in the face of fundamental land use changes, the potential of trophy hunting to contribute to the conservation cause is being increasingly recognised. Trophy hunting can, for example, provide economic incentives to protect wildlife populations and their habitat.

2. The hunting industry in Africa

Trophy hunting is presently practised in 23 sub-Saharan African countries. It has been estimated that the industry generates gross revenues of at least US$ 201 million per year from a minimum of 18,500 clients. Over 1,394,000 km^2 is used for hunting, an area bigger than the surface of the national parks in these countries. South Africa has the largest hunting industry in terms of numbers of operators, visiting hunters, animals shot and revenues generated, although hunting is conducted across a larger geographical area in Tanzania.

The Ethiopian hunting industry is minuscule by comparison to these countries. With regard to the number of clients it is the second smallest (after Malawi).

Table 1. Hunting statistics from Sub-Saharan Africa, a comparison:

Country	Operators (profession al hunters)	# of clients/year	Client nationalities (%)	Hunting days sold/year	Revenue s/year (US$ million)	Animals shot/year	Jobs from hunting
South Africa	1000 (2000)	8530	USA 57 Spain 8 Germany 5	73,938	100,0	53,885	5–6000
Namibia	? (505)	5363	Germany 35 USA 21 Austria 8	15,540	28.5	22,462	2125
Tanzania	42 (221)	1654[a]	USA 45 Spain 15 France 9	20,500	27.6	7034[c]	4328
Botswana	13 (?)	350	USA 80 EU 12	5570	20,0	2500	1000
Zimbabwe	149 (545)	1874	USA 57 Germany 9 Spain 6	19,646	16[a]	11,318	?
Zambia	22 (?)	250	?	?	5,0	5436[b]	?
Cameroon	23 (47)	150–20	France (most)	?	2,0	960[b]	1200
CAR	19 (41)	100–200	France (most)	?	1.4	738	1700
Ethiopia	6 (12)	50–55	USA Denmark Germany	1200-1300	1.3	Around 450	Around 350
Burkina Faso	? (?)	250–350	EU (most)	?	0.6	994	?
Benin	? (?)	80–100	EU (most)	?	?	?	?
Chad	8 (?)	50–100	EU (most)	?	?	?	?
DRC	3 (?)	?	?	?	?	?	?

Sources: Lindsay at all, personal communication, country statistics 2012

Trophy hunting exists also in the following countries: Uganda, Mozambique, Gambia, Ghana, Guinea Conakry, Mauretania, Niger, Senegal, Swaziland, Mali, Congo Brazzaville, Sudan, Malawi.

Sustainable use of nature is a concept which has been accepted worldwide as being effective for the protection and management of natural resources and biological diversity.
This concept – which has been used in German forestry for over 200 years – was adopted in 1992 by the *United Nations Conference on Environment and Development* in Rio as a general principle for humans to interact with the natural resources on earth. It implies that the use of components of biodiversity should not lead to its gradual decline.
Thus hunting is sustainable when it is ensured that the structure of the wildlife population, its role in the ecosystem and its long term survival chance – as well as other affected populations and ecosystems – are not significantly impaired through the take-off of individuals. The hunting of species which would become endangered if they were hunted is not sustainable and cannot be accepted. The loss of biodiversity has to be kept at a minimum. Wildlife management has to be flexible and adaptive in order to modify take-off levels and quotas quickly, if required by population dynamics and changing environmental conditions.

Kenya has banned trophy hunting in 1977 due to corruption and overshooting, and also under the influence of animal welfare NGOs. The costs of this ban have been estimated as US$20–40 million/year in lost revenues (Lindsay at all 2006). It has to be noted that Kenya's wildlife has fared worse than Tanzania's, where hunting is carried out, in the past decades despite the ban and around 1 Billion US Dollar influx of aid in the sector in the last 20 years. This is attributed to bad policies like the absence of community wildlife management schemes, and wrong priorities (Norton-Griffiths 2005).

Trophy hunting is a key component of community conservation schemes in several countries. In parts of Zambia, Zimbabwe, Namibia and Tanzania, revenues from trophy hunting have resulted in improved attitudes towards wildlife among local communities, increased involvement of communities in CBNRM programs, requests to have land included in wildlife management projects, and in several cases in increasing wildlife populations.

Trophy hunting is particularly viable in several countries that receive few conventional tourists (e.g., Benin, Uganda), and in remote parts of countries that are otherwise popular among tourists (e.g. northwest South Africa, southern Tanzania, and the hunting areas of Ethiopia). In Botswana, 74% of the wildlife estate relied on revenues from consumptive wildlife utilization (Barnes, 2001) In view of this, the closure of hunting on Government land in 2014 is difficult to explain and will probably lead to increased poaching and displacement of wildlife by people and cattle in the former hunting areas.

Hunting has several advantages over photographic ecotourism. One is that the industry generates revenues under a wider range of scenarios. For example, trophy hunting is potentially viable in remote areas lacking infrastructure, attractive scenery, or high densities of viewable wildlife. In addition, the hunting industry is also generally more resilient to political instability than tourism. With the onset of land redistribution in Zimbabwe, for example, tourist occupancy fell by 75%, whereas trophy hunting revenues dropped by only 12.2% [Booth, 2002].

Hunting can be an activity among a range of other land uses than would be possible for photographic ecotourism, for instance pastoralism, limited agriculture, collection of forest by-products, and in some cases controlled subsistence hunting. The revenues from trophy hunting combined with the retention of sustainable traditional user rights over natural resources can get communities "into the conservation boat", and has the potential to make them valuable allies in conservation management.

It is evident that trophy hunting generates considerably more income per client than ecotourism. In Zimbabwe and Tanzania, for example, revenues generated by hunting clients are respectively 30 and 14 times greater than those generated per photographic client (Chardonnet, 1995). Consequently, hunting revenues can potentially be generated with lower environmental impacts from littering, fossil fuel use and habitat conversion for agricultural or infrastructure development.

The presence of trophy hunting operators in the hunting blocks normally reduces poaching. Poachers are competition and their presence provides high motivation to the outfitters to protect the wildlife resource on which their business depends. Concession contracts often include the obligation to carry out or assist in anti poaching operations, but normally even the mere presence of outfitters in a hunting area depresses illegal hunting.

3. The trophy hunting industry of Ethiopia

3.1. History of trophy hunting in Ethiopia

There are no published systematic accounts, but quite a number of archive sources and books with information about trophy hunting in Ethiopia are available. Trophy hunting has a relatively long history in Ethiopia. Emperor Menelik is remembered for his role in passing a ban for his subordinates in 1901 to hunt any wildlife, particularly big game like elephants without his prior permission. Before that he reserved the right to grant hunting permits to foreigners, like to Powell-Cotton in 1900 to shoot walia. A more formal type of wildlife conservation started in the 1960s after the establishment of the first National Parks in the country, including Awash and Simien Mountains National Parks. Since then, wildlife conservation and utilization has been conducted with more failures than successes. The violent changes in Government have contributed to the lack of consistency in wildlife law enforcement and institutional instability in the sector.

3.2 Set up of the Ethiopian hunting industry, legal and policy framework.

Ethiopian law and policies acknowledge trophy hunting as legitimate and desired form of land use. The Wildlife Policy of Ethiopia (wildlife development, conservation and utilisation policy) states that “maintaining sustainable utilisation of wildlife in open and controlled hunting areas in a manner that would not affect their distribution through sport hunting or other means” is Government strategy.

Hunting is regulated by Proclamation 541/2007 on “Wildlife Development, Conservation and Utilisation” and the corresponding Regulation 163/2008 with the same title. The Regulation prescribes fees, organisational requirements, licensing and other procedures, do’s and don’ts. They for instance prescribe that hunters have to pre-pay the trophy fees and that there is no refund if the animal is not shot. This is unique in Africa and only to be maintained when the success rate is high and trophy fees are comparatively low in relation to the total safari costs.
The hunting regulations are passed by the council of ministers and signed by the Prime Minister. This gives little flexibility for instance to adjusting prices according to the market situation.
There are guidelines supplementing the Regulation, which explain the Regulation and fill in issues not regulated.
Ethiopia is signatory to regional and global conventions like CITES, CMS, AEWA, and CBD. The legal mechanisms to meet the requirements of these conventions, especially CITES being relevant for trophy hunting, have been created and incorporated into national legislation.
Resident hunting is provided for in the Regulation 163/2008. Of the 54 mammal species allowed for hunting only few (warthog, bush pig, Abyssinian hare, Günter’s dikdik, grivet monkey, anubis baboon, spotted hyena and porcupine) are allowed at a price which is prohibitive for most Ethiopian hunters.

Thus resident hunting is practised almost exclusively by a few foreign residents living in Ethiopia (20 in 2005EC).

Currently, trophy hunting is presently only conducted in three regional states of Oromia, Afar and Southern Nations Nationalities and Peoples Regional State. Oromia gains the highest percentage (58%) of revenue (from trophy and concession fees). This is firstly due to the presence of the Mountain Nyala and secondly to the geographical features of the regional state (large forests, pastoralist areas). Southern and Afar Regional States have quite large numbers of interesting animal species in a number of locations, but the hunting concentrates on a few species and areas only and is mainly supplementary to the highland species hunting. Gambella Regional State has the highest concentrations of antelopes (the kob migration), but presently no active CHA and also no resident hunting. Somali region has asked EWCA for support to establish two CHAs, but has not started hunting there due to internal dissent.

The Ethiopian Wildlife Conservation Authority manages the hunting on behalf of the regions, which "own" the hunting areas. Of the trophy fees, 85% are transferred to the regions, 15% stays with EWCA to cover its costs, which includes ecological monitoring for quota setting. The concession fee goes totally to the regions, whereas the other fees like PH fee, gun handling fee, conservation fee etc stay with EWCA.

As all land is owned by the Government, the trophy hunting is conducted in the government/public owned areas. In Oromia, the Oromia Forest and Wildlife Enterprise is responsible for the wildlife utilisation. The concession- and hunting fees are paid to the Enterprise. For one CHA there is a special community-orientated arrangement: Adaba-Dodola has a functioning communal tourism cooperative carrying out trekking tourism in the area, so 65 % of the hunting fees are passed on to the cooperative by the Enterprise. In other regions the hunting fees are paid to the respective regional Government. From there they are distributed to the lower levels of Government according to specific keys.

3.3 Hunting areas and outfitters

There are presently (2006) 15 active CHAs and 6 open areas. 6 CHAs are presently not hunted, for various reasons, but might be hunted next year again, if the allocation process through tendering will work out. The CHAs have been allocated to the registered hunting companies for five years by direct allocation at a fixed price. EWCA promotes auctioning or tendering, as provided for in the Regulation 163/2008.

Table 2 shows the CHAs with the concessionaires and their size in 2006 EC. The open hunting areas can be booked for clients by any operator. They offer special animals like for instance Gelada baboon otherwise not accessible by concessionaires with highland CHAs.

One controversial issue is the contract with the concession holders: in the contract it is prescribed that the concessionaire is obliged to manage the block including antipoaching, community relations etc. In addition the block owner is asked to provide social benefits to the local communities (schools, clinics etc.). Basically it is expected from the concession holder to carry out government functions which are elsewhere in the protected area system performed by government institutions. Given the little value of some blocks this means to ask too much, apart from the fact that often the expertise is not available with the outfitter.

Concessions have not been given to foreign companies for various reasons, even though there is now no legislation that prohibits it. So far, since inception of organised trophy hunting, a restricted circle of local hunter/outfitters, even though most of them do not have the Ethiopian citizenship, have monopolised the hunting industry. There is also a lack of interest of outsiders, probably caused by (for them) not transparent allocation procedures, small quotas and difficult administrative procedures.

The price for a concession is now 100,000 ETBirr, which equals presently around 8500 USD, plus 5% of the trophy fees of the quota. It is shown in chapter 3.7 that the low net turnover potential of some blocks makes the economic viability of this blanket fee for these blocks doubtful.

Table 2: Hunting areas, concession holders 2006 EC

	Hunting Company	Hunting Block	Size in km^2	remarks
1	**Ethiopian Rift Valley Safaris**	Aba Sheba Demero	166	
		Besemena Odobulu	350	
		Murulle	511	
		Weleshet Sala	291	
		Munesa Kuke	110	
		Aluto	280	
2	**Libah Hunting and Photo Safaris**	Bile Hartele	1095	
		Arba Gugu	636	
		Hurufo Soma	214	Given up
3	**Travel Ethiopia Hunting Organisation**	Shedem Berbere	170	
		Telalak Dewe	500	
		Sororo Torgem	73	
		DinDin	280	Given up
		Haro Abadiko	243	
4	**Shield and Spear Safaris**	Adaba Dodola	736	
5	**Rocky Valley Safaris**	Chifra	546	Not hunted in 2005
		Hanto	206	
6	**Blue Nile Safaris**	Urgan Bula	79	Not hunted in 2005
7	**SALJoel Saudi-American Investment**	Asbahirei	167	Not hunted in 2005
	New CHAs not yet assigned	Gasara Wabe	107	To be auctioned
		Berui Tasabi	356	To be auctioned
	Total area		7116	
	Open hunting areas			
		Gara Gumbi	50	
		Gara Miti	52	
		Jibat	100	
		Gelila Dura	2027	
		Sinana	15	
		Debre Libanos	31	
	Total area		2275	

Source EWCA 2014

It is evident that large areas outside the mountain nyala range (and maybe even inside) are eminently suitable for hunting, but are presently not hunted and have no quota. Gambella serves as example, but also areas in Oromia (for instance the wilderness north of Sheik Hussein) and Southern region (the lowlands west of Omo, Borana, Gibe valley), to name only some.

3.4 Status of wildlife populations, quotas and trophy fees

Wildlife numbers in Ethiopia have dwindled dramatically over the past 20 years, but there seems to be a recovery during the past 10 years in some areas, especially for key species like Walia ibex and Swayne's hartebeest. The toppling of the Derg-regime has led to invasion of some PAs and wholesale slaughter of animals in many good wildlife areas. While almost all larger and “charismatic” mammals still occur, their numbers often do not allow a hunting quota any more. This applies especially to elephant, which are down to probably not more than 1800 individuals, albeit in several populations spread over the country (Babille 250, Kafta Shiraro 300, Gambella 450, Chebera Chuchura 500, Omo/Mago 150, Geralle 20, South-western forests unknown, but present).

Ethiopia has some highly sought-after endemics, especially the mountain nyala, a species resembling the greater kudu, but highly specialised in its habitat. The nyala is confined to the high mountain ranges of Bale and Arsi east of the rift valley. Associated with the mountain nyala is the Menelik bushbuck, a large, black mountain race of the ubiquitous African bushbuck.

There are “hunting” endemics (animals that occur elsewhere, but can only be hunted in Ethiopia), like the Beisa oryx, Soemmering’s gazelle, Salt’s dikdik, white-eared kob.
Some species are really abundant, foremost the white-eared kob in Gambella, that occur there in their hundreds of thousands, but also Salts dikdik, warthog and lesser kudu in the lowlands, klipspringer and duiker almost everywhere, to name some examples.
As much of the hunting concentrates on the mountain nyala areas, the status of the mountain nyala has become a bone of contention among conservationists. In 2006 Paul Evangelista estimated the numbers to be between 3000 and 4000. This has been confirmed by more recent research (A. Bekele at all, 2012). Habitat is shrinking, however, and the quota of around 30 to 40 per year seems to be appropriate for the moment. Mountain nyala can sustain very high densities, as the Bale Mountain National Park enclave at Dinsho shows. They reproduce fast like all spiral-horned antelopes. Main threat is habitat loss. Habitat protection must therefore be the main strategy to conserve this species. This means that the integrity of the hunting areas has to be maintained by sound management regimes, which include sustainable quotas and community participation and benefits.

Table 3 shows the huntable species and their prices:

Table 3: huntable species and trophy fees

English Name	Scientific Name	Unit Price (USD)
Baboon, Anubis	*Papio anubis*	100
Baboon, Gelada	*Theropithecus gelada*	3,000
Baboon, Hamadryas	*Papio hamadryas*	1,000
Bushbuck, Common	*Tragelaphus scriptus*	700
Bushbuck, Menelik's	*Tragelaphus s.meneliki*	6,000
Buffalo	*Syncerus caffer*	3,000
Caracal	*Felis caracal*	400
Cat, Wild	*Felis silvestris*	200
Colobus, Black & White	*Colobus guereza*	600
Crocodile, Nile	*Crocodylus niloticus*	2,000
Dikdik, Guenther's	*Madoqua guentheri*	200
Dikdik, Salt's	*Madoqua saltiana*	340
Duiker, Grey	*Sylvicapra grimmia*	360
Fox, Bat-Eared	*Otocyon megalotis*	300

Gazelle, Grant's	*Gazella granti*	440
Gazelle, Soemmerring's	*Gazella soemmerringi*	2,600
Genet, Common	*Genetta genetta*	200
Genet, Rusty-Spotted	*Genetta rubiginosa*	200
Gerenuk	*Litocranius walleri*	3,000
Hare, Abyssinian	*Lepus habessinicus*	60
Hartebeest, Lelwel	*Alcelaphus buselaphus lelwel*	4,000
Hippopotamus	*Hippopotamus amphibius*	1,200
Hog, Giant Forest	*Hylochoerus meinertzhageni*	1,000
Hyaena, Spotted	*Crocuta crocuta*	180
Jackal, Black-backed	*Canis mesomelas*	100
Jackal, Golden	*Canis aureus*	160
Jackal, Side- Striped	*Canis adustus*	100
Klipspringer	*Oreotragus oreotragus*	1,400
Kudu, Greater	*Tragelaphus strepsiceros*	2,700
Kudu, Lesser	*Tragelaphus imberbis*	3,000
Leopard	*Panthera pardus*	4,600
Lion	*Panthera leo*	4,000
Mongoose, Egyptian	*Herpestes inchneumon*	60
Mongoose, Slender	*Herpestes sanguineus*	60
Mongoose, Southern Dwarf	*Helogale parvula*	60
Monkey, Blue	*Cercopithecus mitis*	140
Monkey, Grivet	*Cercopithecus aethiops*	80
Monkey, Vervet	*Cercopithecus pygerythrus*	80
Nyala, Mountain	*Tragelaphus buxtoni*	15,000
Oribi	*Ourebia ourebia*	240
Oryx	*Oryx Beisa*	2,000
Ostrich	*Struthio camelus*	1,600
Pig, Bush	*Potamochoerus porcus*	400
Porcupine	*Hystrix cristata*	50
Ratel	*Mellivora capensis*	300
Reedbuck, Bohor	*Redunca redunca*	700
Reedbuck, Mountain	*Redunca fulvourfula*	1,000
Serval	*Felis serval*	360
Tiang	*Damliscus lunatus tiang*	1,100
Warthog	*Phacochoerus aethiopicus*	400
Waterbuck, Defassa	*Kobus ellipsiprymnus*	1,000
Zorilla	*Ictonyx striatus*	100
Lechwe, Nile	*kobus megaceros*	7,000
Kob ,White eared	*Kobus kob leucotis*	4,000

Source: regulations 163/2008

At a first glance some of the trophy fees seem to high and some too low in view of their relative abundance and the possibility to hunt them elsewhere. For instance, oryx and giant forest hog seem too low, lesser kudu, Lelwel hartebeest, klipspringer, to name a few, too high.

In Table 4 the quotas and their development over the past years are shown:

Table 4: Quotas, Ethiopian main huntable wildlife species 1991-2006 EC

	Wildlife species	1992	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
1	Nyala, Mountain	14	32	31	28	28	33	32	31	38	41	40	41	35	32
2	Klipspringer	7	7	1	21	20	5	1	4	6	7	10	8	8	9
3	Reedbuck, Bohor	1	4	7	7	9	5	3	4	4	2	2	9	9	10
4	Bushbuck, Menelik's	15	36	33	30	30	48	64	56	58	56	57	52	43	38
5	Duiker, Grey	14	17	13	12	7	4	2	4	4	5	4	7	8	14
6	Colobus Guereza	21	25	37	41	38	34	31	37	51	40	35	39	46	40
7	Leopard	2	4	3	4	4	2	2	2	8	4	3	10	8	6
8	Hog, Giant forest	3	9	9	11	11	13	12	12	15	10	8	12	14	14
9	Baboon, Gelada	0	0	0	4	4	4	4	3	4	7	4	4	3	3
10	Lion	5	15	10	5	4	1	0	0	0	0	0	0	0	1
11	Caracal	3	2	2	4	4	1	1	1	1	2	2	2	2	3
12	Kudu, Greater	4	5	9	11	14	7	6	6	5	4	4	10	9	10
13	Serval	8	4	4	6	6	1	1	1	1	0	0	2	2	2
14	Waterbuck, Defassa	4	13	14	6	8	8	10	11	11	10	9	7	8	6
15	Hartebeest, Lelwel's	0	7	8	8	7	7	7	7	5	5	0	7	7	7
16	Tiang	12	10	10	10	10	11	11	11	11	5	5	5	6	5
17	Oribi	5	7	7	8	7	6	5	5	3	3	0	5	5	5
18	Gazelle, Grant's	16	15	15	40	40	26	26	26	26	15	15	15	15	9
19	Cat, wild	3	3	3	5	6	1	1	3	3	2	2	3	3	3
20	Buffalo	0	5	6	6	6	6	17	17	18	18	16	9	10	10
21	Gerenuk	17	26	25	14	14	10	10	13	13	16	16	16	18	18
22	Kudu, Lesser	13	37	35	39	39	30	30	24	25	21	20	21	26	26
23	Gazelle, Soemmering's	15	25	20	15	10	15	15	11	12	16	16	16	16	16
24	Dikdik, Salt's	32	42	44	30	30	4	46	21	28	29	29	35	37	37

							6								
25	Baboon, Hamadryas	10	59	39	18	18	12	12	13	29	23	26	25	19	24
26	Oryx	9	9	21	20	20	9	9	9	9	10	10	11	11	8
27	Hippopotamus	4	3	0	1	1	0	3	3	4	4	4	0	0	0
28	Crocodile, Nile	3	7	7	7	11	10	10	3	3	2	2	0	2	2
29	Bushbuck, Common	20	16	17	13	11	9	9	6	6	9	10	12	11	8
30	Reedbuck, Mountain	0	0	3	3	3	7	2	2	2	2	0	2	2	2
	Totals	**260**	**444**	**433**	**427**	**420**	**371**	**382**	**346**	**403**	**368**	**349**	**385**	**383**	**368**

Source EWCA, Ethiopian calendar

Quotas are set by monitoring visits every two years, carried out by the experts of EWCA. These visits can only produce an instant view of the status of the monitored species. This seems to be a very unscientific method of quota setting, not used elsewhere in Africa. There is no ecological monitoring in place which allows for long term observation and data, collection for instance based on trophy monitoring, long term observations, success rates and effort needed in hunting, aerial surveys for plains game etc. This is a potentially dangerous situation, not so much because of possible overhunting, but because the wildlife utilisation potential is not used to the full, which leads to loss of income for the Government.

Quota setting often poses a problem for the responsible agencies.
Good and consistent data collection and processing is required by the management authority over the whole hunting season.
The establishment of quotas for kob with the present survey methods applied does not make sense, as the animals are migratory and their presence in particular locations varies from zero to many thousands within weeks. Where they are present they can be hunted and quotas are not required.
Aerial surveys are costly and do not provide data for animals with a clandestine lifestyle, like nyala, bushbuck, lion, leopard, duiker, giant forest hog.
Experience from other countries, especially Europe and America shows that it is a waste of resources to try to "count" the cryptic animals. Estimates have to be developed by indirect indicators like development of trophy size, hunting effort, population dynamic estimates.
Long term data collection depends on the cooperation of the hunting companies.

The quotas in the table above seem all in all very conservative. For comparison: in Germany around 1,5 to 2 Million hoofed animals are hunted every year, as compared to around 200 animals per year (trophy and resident hunting combined) in Ethiopia. For the number of animals hunted in other African countries please see Table 1. To show the relevance of quotas in view of illegal utilisation: between 5000 and 10000 white-eared kob are poached every year in Gambella. It is highly likely that this offtake is unsustainable, even though the kobs come from a population of an estimated 500,000. No hunting is carried out for this species, however, and the illegal offtake of this magnitude would certainly make quota-setting nonsensical.

There are no quotas for the following animals, because they are considered to be very abundant: warthog, bushpig, spotted hyena, hare, porcupine, Guenther's dikdik, Grivet monkey.
These animals are on the resident hunters license list. This list could be enlarged for other obviously abundant species like the Salts dikdik, duiker, common bushbuck and of course the white-eared kob.

Table 5: Total number and percentage of animals on quota sold and hunted 2005 EC

	2005 Quota	2005 sold	Percentage of Quota sold	2005 hunted	Percentage of sold quota hunted	Percentage of Quota hunted
Total	**383**	**179**	**47%**	**134**	**75%**	**35%**
Nyala	**35**	**23**	**66%**	**20**	**87%**	**57%**

Source: EWCA

The quota utilisation figures show that quotas given can be sold only to less than 50%. This reflects the drop in the number of hunters from 57 in 2001 to 28 in 2005. Hunting

success is only 75%, despite prepayment of the trophy fees. Even of the flagship species mountain nyala only 2/3 of the quota could be sold, which means a loss for the Government of 180.000 USD in trophy fees (for 12 nyala). All in all trophy fee income dropped from 949.000 USD in 2004 to 684.240 in 2005. This drop in hunters coincides with the price increases and shows that the increases were not accepted in the market. These figures are very alarming and EWCA has to take drastic measures to reverse this negative trend.
Information from other parts of Africa shows that the hunting industry was not as negatively affected by the crisis as the photographic safari industry. Zimbabwe for instance took a 20 % dive only as compared to 50 % in the high class photographic safari market segment. This suggests that the price increase has been the determining factor for the high decline in clients in Ethiopia in the last years.

The quotas only refer to the controlled hunting areas, which are small covering only 9.300 km^2 of the country (out of which 2000 km^2 come from a very low potential open CHA, see Table 2, Gelila Dura). The wildlife estate of Ethiopia is much larger and hunting could be spread more widely.

The quotas are presently set without the demand in mind. This leads to very high quotas of locally abundant animals like Menelik bushbuck (16 in one case) and colobus monkey. Most of these animals are not "sellable", because the demand is lower and the number of safaris possible in one hunting area is determined by the key animals on quota there.

3.5 Outfitters: description, service, experiences

There are presently 7 hunting companies registered in Ethiopia, one of which is not operational.

Table 6: Outfitters and number of hunting areas:

	Company	**Owner (GM)**	**Number of CHAs**
1	Ethiopian Rift Valley Safaris P.L.C.	A. Nassos Roussos	6
2	Libah Hunting and Photo Safari	Dimitris Assimacopoulos	2
3	Rocky Valley Safaris	Late Col. Nigussie Eshete	2
4	SAL Joel Saudi American investment	Bezu Beyele	1
5	Travel Ethiopia Hunting Safari	Samrawit Moges, Thomas Mattanowich	3
6	Shield and Spear International Safaris	Sisay Shewamene	1
7	Blue Nile Safaris	Francesco Morescalchi	defunct
	Total Concession Blocks		**15**

	active 2006 EC		

Source: EWCA data 2014

The owner of ERVS, Nassos Roussos, is the president of the professional hunting association. He is a very experienced hunter and hunting operator, and runs also a thriving tour operation. His son Jason, who is a biologist with a specialisation in Mountain Nyala research, is working with him.
Wildlife Safaris is owned by Thomas Mattanowich and his wife Samravit Moges. Thomas Mattanowich is the doyen of the Ethiopian outfitters and hunters. He has a high international reputation gained by being the pioneer of Ethiopian hunting (after Ted Shatto, who gave up hunting in the early 70ies). Due to his age he is not actively hunting any more.
Libah Safaris owned by the family Assimacopoulos. They owner Dimitris has investments in Awash town and operates from there.
Colonel Negussie Eshete, the owner of Rocky Valley Safaris, has been a veteran in the Ethiopian safari business. He died recently and it seems that the business has dropped as a consequence.
Sisay Shewamene has one highland block, which allows him to run a successful part time operation.
Francesco Morescalchi seems to have given up hunting, and his block, which has a very low quota value, is yet to be re-assigned.
Bezu Beyele is new in the business and has still to build up a reputation.

All outfitters have businesses registered in Ethiopia, which is a legal requirement. Most of them are Ethiopian citizens and when not have longstanding roots in the country.
No outfitter from abroad was successful to enter the market, even though some tried in the past. There are a number of international hunting companies that serve as agents for local outfitters. Clients can book through them. Often they send professional hunters with the client, who under Ethiopian law can only act as observers.

4. The Economics of Ethiopian tourist hunting

4.1. Pricing:

Ethiopia is an expensive hunting country. The declining hunting visitors numbers indicate that that the country might have herself "priced out of the market".

Ethiopia requires the outfitter to deposit 800 US$ minus 15 % marketing deduction per hunting day. For Nyala hunts, the established outfitters with good blocks can charge a higher price, we assume here 1500 USD/day.
21 days are the minimum days prescribed for Nyala and dangerous game hunts. 15 days are the minimum for plainsgame hunts.

The estimated price of a Nyala safari can be estimated as in the example below.

Table 7: Example: Price of an average Nyala safari

Fees	Cost US$	days	Total before tax	Total	Explanation
Daily Rate	1500	21	31,500	36,225	In addition 15 % VAT
Observer Fee	250	21	5,250	6,038	In addition 15 % VAT
Conservation Fee	100	21	2,100	2,100	

Trophy Fee Mountain Nyala	15000		15,000	15,000	
Trophy Fee Menelik's Bushbuck	6000		6,000	6,000	
Trophy Fee other				4,000	Average: some other animals
Hunting Rifle License Fee	100		200	200	2 rifles
Scout allowance			630	630	
Hotel, Taxidermy, shipment of trophies	5000		5,000	5,000	
Total costs				75,193	

Source: own enquiries

In the following a comparison of daily rates in Africa:

Table 8: Daily rates of selected hunts in Africa

Type of Safari	Daily rate $	Days average
Lion, Leopard Buffalo & Plains Game	1,978	21
Lion, Buffalo & Plains Game	1,711	20
Leopard, Buffalo & Plains Game	1,365	15
Leopard, Sable & Plains Game	914	14
Elephant & Plains Game	1,536	13
Buffalo, Sable & common Plains Game	1,786	13
Buffalo & Plains Game	1,374	9
Buffalo Only	1,118	8
Sable, Waterbuck & common Plains Game	1,251	10
Common Plains Game	691	7

Source: Booth, V.R (2009). Averages taken from Zimbabwe, Tanzania, Zambia, South Africa, Botswana, Namibia,

The daily rates above show that the Ethiopian daily rates are competitive, but only as far as mountain nyala hunts, combined with other highly sought after are concerned. But even for dangerous game hunts there are rates in some countries that are lower than the ones in Ethiopia, especially for buffalo, so Ethiopia is exposed to stiff competition.
The main difference between Ethiopia and the countries analysed above is in the number of hunting days required by law: Ethiopia is requiring a minimum of 21 days for nyala, buffalo, hippo, leopard, kob, and 15 days for all other species. Ethiopian daily rates multiplied by the minimum number of days required makes Ethiopian hunting clearly more expensive than the African average.

The second main difference is the regulation to pay for the trophies in advance with no refund when the trophy is not obtained. This happens quite often and puts clients off. No other African country follows this system.

There are signals that even marketing of the Nyala hunts, the main motor of the industry, has been difficult in recent years. The number of hunters has dropped in the last years from over 50 to 28 (in 2005 EC). Several hunting companies have not yet received any bookings this year (Jan. 2014) , even though the hunting season of 2006 is in full swing.

The price increases in 2003/04, combined with the inflexibility of hunting days and the pre-payment of the trophy fees seem to be the major reason, even though there might be a number of other reinforcing factors like the world economic crisis, which unfortunately coincided with the price increases, and the bad marketing performance and service of some hunting companies,
The income of the safari company is determined by:

- the number of hunting days to be marketed, and
- the price per day (daily rate)

It is not determined by the trophy fee, which is a cost position directly paid to the Government.
The company earns its money from the hunting days it sells, like any other tour operator. This means that the outfitter has an interest to maximise the hunting days sold by him in order to maximise his income. The minimum days required by the Ethiopian legislation are therefore obsolete. The minimum days were introduced to assist the revenue authority to collect the much needed foreign exchange. It is very likely that by introducing the minimum days, the lawmakers have inadvertently reduced the amount of foreign exchange earned by the industry, because the inflexibility of the system has contributed to the reduction of the number of hunters and thus of revenue.

4.2. Earning potential of the concessionaires:

There are large differences between the outfitters with regard to the value of their hunting areas and thus their "earning potential."
They higher a company's quota is, the higher is the number of hunting days the company can sell. This determines its earning potential.
In the following the hunting companies are compared with regard to number and quota value of blocks, and marketable number of hunting days and number of hunting safaris.

Table 9: Controlled and open hunting areas, quotas, value of quotas, possible number of safaris and hunting days

	CHAs	Concessionaire	Nyala	Men. BB	Buffalo	Leopard	Croc	Oryx	Giant F. Hog	Lesser kudu	Gerenuk	Soemmering	Grant	Water buck	other	Value of quota	Hunting days max.	Number of safaris
		Price $	15000	6000	3000	4600	2000	2000	1000	3000	3000	2600	440	1000		In '000$		
1	Abasheba-Demero	ERVS	5	5		2			1							119,9	126	6
2	Besemenna Odubulu	ERVS	5	16		2			4							190,7	126	6
3	Aluto	ERVS												4	5 great K.	13,8	126	5 suppl
4	Munesa-Kukie	ERVS	4	3												79,8	84	4
5	Murulle	ERVS					2			8	8		14		2 great K.	80,8	80	8 suppl
6	Walishet Sala	ERVS			4					1				2	7 Lelwel	48	40	4 suppl

		Sum EVRS	**14**	**24**	**4**	**4**	**2**		**5**	**9**	**8**		**15**	**6**		**533**	**582**	**25**
1	Arbagugu	Libah	6	7											2 Klips pr	137,4	126	6
2	Bilen Hartele	Libah					2	4		4	7	5		2		82,5	57	5 suppl
		Sum Libah	**6**	**7**				**4**		**4**	**7**	**5**		**2**		**220**	**183**	**9**
1	Hanto	RVS	6	4											4 Klips pr	128	126	6
2	Chifra	RVS						4		2		9			Ham adrayas 3	46,3	44	4 suppl
		Sum RV	**6**	**6**				**5**		**3**		**6**				**174,3**	**170**	**8**
1	Shadem-Berberie	Travel Et	2	4		2										51,2	42	2

		hiopia																
2	Telalak Dawe	Travel Ethiopia						3		3		5			Hamadrayas 4, BBcom 2	35,6	52	2 plus 1suppl
3	Sororo Torgem	Travel Ethiopia	2	2		2										55,2	42	2
		Sum Travel E	**4**	**6**		**4**		**2**		**3**		**4**				**142**	**136**	**7**

		thiopia.																
1	Urgan-Bula	Blue Nile Safari																Not operational
1	Adaba Dodola	**SSIS**	**3**	**1**												**51,6**	**63**	**3**
1	Asbahirei	**SAL Joel**						**1**		**2**		**3**			Hamadrayas 5	**22,2**	**42**	**2**
	Grand total															**1143,1**	**1.176**	**54**
	Open areas																	
1	Gara Gumbi	open													1 lesser K. 4 Hamadrayas	8,7		
2	Gara Miti	o													3	1,1		

		pen													DikDik			
3	DebreLibanos	open													3 Gelada	9		
4	Sinana	open													6 Bohor	4,4		
5	Jibat	open							3							8,1		
6	Gelilu Duru	open												1		1,5		
	Total															**32,8**		

Source: EWCA 2006

Explanatory notes:

1. Table contains the most important animals for the safari business.
2. Number of hunting days and number of safaris estimated according to availability of “lead” animals in quota and the minimum days required by law. Hunting areas marked suppl. are included with half of the hunting days possible, because safaris booked there (especially for plainsgame in the lowlands) are often combined with nyala hunts.
3. Value of marketable quota calculated on basis of the number of “lead” animals. Ethiopia allows 1 kill of each species, so a quota of 2 nyala also means 2 Menelik bushbuck, even though the bushbuck quota might be higher.
4. The open areas only play a marginal role for this analysis. They are not calculated here.

The costs to run the concessions are determined by their accessibility and the number of safaris and hunting days per concession. The concessionaires have the obligation to carry out conservation and development measures in their blocks, in fact actually perform Government management tasks. This means they have to maintain a more or less permanent presence in the block.
The owner of a high value-block with a high number of sellable hunting days can easily fulfill this. His presence in the block is paid for by the clients. Problems arise in low-value blocks (there are blocks which only 42 marketable hunting days per year, see Table 9), where the operator's presence is restricted by a low number of safaris/hunting days. This creates a potentially dangerous situation: low value blocks are not properly managed, neither by the outfitter nor by regional Governments.

4.3. Imbalance between outfitters as regards allocation of blocks

Table 10 shows that ERVS has the largest share (47%) of the hunting days to be marketed. The others share the rest.

Table 10: Concession holders and value of quota

Concessionaire	Hunting days	%	Hunting days per block	Value of quota '000 US$	%	Value of quota per block '000 US$
Ethiopian Rift Valley Safaris	582	50	97	533	47	88,8
Libah Safaris	183	16	92	220	21	110
Rocky Valley Safaris	170	14	85	174,3	14	87,2
Travel Ethiopia Hunting Safaris	136	12	45	142	12	47
SAL Joel Saudi American	42	3	42	22,2	2	22,2
Shield and Spear International Safaris	63	5	63	51,6	4	51,6
Total	1155	100		1143,1	100	

Source: own calculation from EWCA data

Around half of the value created by the industry is produced by ERVS. The other 5 companies share the remaining half of the quota and the marketable hunting days/safaris. From the bigger companies WS/Travel Ethiopia are worst off with regard to their income potential overall and per block.

This is potentially dangerous, because ERVS is naturally the best performer and it is difficult for the other companies to expand. For understandable reasons the regions prefer the best performer when it comes to the allocation and reassignment of blocks. This clashes with EWCA's desire to give other outfitters the opportunity to grow.

This imbalance manifests itself in the earning potential: in the following the possible turnover of the safari companies is estimated.

Table 11: Possible turnover of the safari operations (in USD)

	Company	Number of safaris	Possible turnover including fees and direct costs	Possible turnover excluding fees and direct costs
1	Ethiopian Rift Valley Safaris P.L.C.	25	1875,000	937,500
2	Libah Hunting and Photo Safari	9	675,000	337,500
3	Rocky Valley Safaris	8	600,000	300,000
4	Wildlife Safaris, Ethiopia/ Travel Ethiopia Hunting Safari	7	525,000	262,500
5	Shield and Spear International Safaris	3	225,000	112.,500
6	Blue Nile Safaris	2	150,000	75,000
	Total	54	4050,000	2025,000

Source: own compilation from EWCA data

Assumptions:

1. The average cost of a safari is 75,000 US$. This includes non-Nyala hunts, because price structure is similar due to rigidity of system.
2. The average duration of a hunt is 21 days
3. Half of the cost is trophy fees and other direct costs paid by the client to the Government. This leaves 37,500 per safari for the operator, from which he has to meet the costs of the outfitting.

This turnover has to cover the following costs:

1. Conservation fee: 100.000 Birr per Block plus 5% of the total value of the trophy fees
2. PH fees
3. Outfitting costs, this is the biggest part, but depends on location of block, whether a fixed camp can be maintained etc. This includes the salaries generated in the industry.
4. Taxes on company profits

Table 12: Jobs and salaries in safari industry of Ethiopia:

Jobs	Numbers	Salaries US$	Total/year	Factor 50%
PHs	15	30,000	450,000	
Skinners	30	2000	60,000	
Drivers	24	1500	36,000	
Trackers	24	1500	36,000	
Cooks	20	2000	40,000	
General camp staff	200	1000	200,000	
Scouts	54	1500	81,000	
Clerical staff	30	2000	60,000	
total	**343**		**963,000**	**481,500**

Source: estimations on basis of interviews and other countries' experiences

Assumptions:

1. employment is for ½ year on the average,
2. PHs are partly local and not paid the Africa-wide much higher average

The industry has the potential of earning directly around 4 Million USD per year, shared half between the Government and the companies. Tables 14 below shows that the multiplier effects in the economy add another half Million USD to this figure.

Only ERVS seem to have sufficient turnover potential to sustain an operation all year around. The others have to run part time operations, which makes it difficult to impossible for them to maintain a permanent substantial presence in their hunting blocks.

4.4. Marketing:

Up to four seasons ago there had been little difficulty on the side of the outfitters to market the hunts.
This is reflected in the low marketing efforts of the Ethiopian hunting companies.
Only two outfitters have so far advertised safaris on own websites, Libah Safaris and Rocky Valley Safaris. Ethiopian hunting is offered on seven websites outside Ethiopia. The biggest outfitter ERVS does not advertise at all on the net, but visits the annual SCI-organised fair in USA. This shows that so far only little effort has gone into marketing. In the other countries the marketing effort is certainly much bigger than in Ethiopia.
Outfitters in Ethiopia obviously lack skills, experience and channels to step up marketing.
The low turnover of some companies also prohibits them to visit hunting fairs and attract clients directly. This is the reason that often international agents are used, which diminishes the earning potential further.

Table 13: tourist hunters origin

Tourist Nationality	1988	1989	1990	1991	1992	1993	1994	1995	1996	19	1998	1999	2000	2001	2002	2003	2004	2005	Total	%
USA	4	20	21	18	14	28	30	25	30	39	32	34	30	38	29	22	17		363	62
Spain	0	1	2	5	1	0	0	1	1	0	1	7	1	4	0	1	2		27	5
Denmark	0	0	0	0	0	0	3	5	8	3	4	0	0	0	0	0	0		23	4
Germany	0	1	2	3	2	1	0	2	0	2	0	1	1	1	2	0	4		22	4
Italy	0	1	2	2	1	5	1	0	1	1	2	0	1	0	1	0	2		20	3
France	0	0	0	1	2	1	0	0	2	0	3	0	1	4	1	4	1		20	3
Mexico	0	0	2	1	1	0	1	3	1	0	0	1	2	1	1	5	0		19	3
Russia	0	0	0	0	0	0	0	0	0	1	2	1	5	1	2	3	3		18	3
Canada	0	1	0	0	1	0	0	1	2	0	0	3	0	3	1	0	1		13	2
South Africa	0	1	2	0	2	0	1	0	0	0	0	1	1	0	1	1	1		11	1
Austria	0	0	0	0	0	0	0	1	1	0	0	1	3	1	1	0	1		9	1
Qatar	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	3	3		8	1
Belgium	0	0	0	0	1	2	0	0	2	0	0	0	0	0	1	0	1		7	1
Sweden	0	0	1	0	0	0	0	0	0	0	1	1	1	1	0	0	1		6	1
Switzerland	0	0	0	0	0	2	0	1	0	1	0	0	0	0	0	0	1		5	1
Guatemala	0	0	0	0	0	1	1	1	0	0	0	0	0	0	0	0	0		3	1
Keny	0	0	0	0	0	0	0	0	0	1	0	1	1	0	0	0	0		3	1

a																				
Greece	0	0	0	1	0	0	0	0	0	1	1	0	0	0	0	0	0		3	1
Argentina	0	0	0	2	0	1	0	0	0	0	0	0	0	0	0	0	0		3	1
UK	0	1	0	0	0	0	1	0	0	0	0	0	0	1	0	0	0		3	1
Chech Rep.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1		1	0
total	**4**	**25**	**32**	**33**	**25**	**41**	**38**	**40**	**48**	**49**	**46**	**51**	**47**	**54**	**42**	**39**	**38**	**28**	**587**	

Source: EWCA records (Ethiopian calendar) 2005 country data not yet available

Ethiopia is normally visited by seasoned hunters with previous African experience. They come here to complete their collection especially of spiral horned antelopes, but also other collections.
70 % of the hunters come from USA and Canada, most of the others from Europe, some from Latin America, and few from Africa, none from Asia. This shows an almost total dependency on the US hunting market. The provenience of the clients makes the state of the US economy a determining factor of Ethiopia's trophy hunting, far more than elsewhere in Africa, see Table 1 in this respect.

This poses a risk for the hunting industry and diversifying the client basis should be attempted. This could be done for instance by promoting special hunts for animals where Europeans and Asians have a special preference for (f. i. pigs for middle Europeans) .

One negative aspect of this dependency is the preference of American hunters for trophy length (according to the SCI record book). Old males of several species (buffalo, kudu, Nyala etc.) often have worn down, shorter horns than male specimens in their prime. From EWCA point of view it is desirable that preferably these old animals should be hunted, as they have passed on their genes and might be already out of the reproduction cycle. European hunters go more for age and ruggedness than length.
In this context EWCA should reconsider the use of the minimum measurements of the SCI record book for determining the penalties for trophies which are too small.
It can be assumed that the hunter's willingness to pay depends also on the quality of the hunt, the feeling that sound conservation policies are in place and that revenues benefit local communities.
The standard of the service, from camps to cars, is generally lower than in other African countries, especially as compared to east and southern Africa. This also lowers the possibility of higher prices.

4.5 Economic benefits of Ethiopia's tourist hunting:

Presently Ethiopia is able to attract only less than 30 hunters per year, with a downward trend.
This is a too narrow basis to sustain a hunting industry and limits its multiplier effects. The multiplier effects of hunting consist of air fees, air charter fees, hotel costs, non-hunting safaris, and sundry costs paid by clients.

These multipliers can be estimated as follows:

Table 14: Multiplier effects of the industry (USD)

Hotel fees:	1500 per client
Air charters:	4000 per client
Air fees:	Ethiopian Airways 3000 for 50 % of clients
Safaris non-hunting:	6000 for 30 % of clients
Sundry costs:	1000 per client
Sum:	**502,000**

Source: own estimates

This income is mainly in foreign exchange which benefits the Ethiopian economy which is forex-strapped.

The income for the Government is distributed by EWCA. 85% of trophy and concession fees go to the regions where the hunting takes place. 15% is transferred by EWCA to the federal coffers.

The regions deal with the money in different ways. Oromia and the South have distribution keys which include the Woredas where the hunts take place. This is desirable because of the incentive the money provides to the communities to protect the wildlife and its habitat. However, in most cases the money is not channeled to the communities, which poses a risk for the management of the hunting areas, as local acceptance by the communities is compromised.

5. Recommendations

5.1 Quota setting:

Improve quota setting by introducing better scientific methods: Improved monitoring of wildlife populations is necessary to ensure that quotas are on one hand sustainable, on the other hand realistic and economical. Counting "cryptic" animals like bushbuck, leopard, duiker with the methods presently applied is not possible.
It is recommended to put an ecological monitoring system in place which allows for long term and robust data, for instance based on trophy monitoring, long term observations, hunting success rates and effort needed in hunting, aerial surveys for plains game etc.
Where trophy hunting occurs on communal land, simple, repeatable counting techniques should be used for censuses, and communities and their scouts should be involved in order to develop a sense of responsibility for resource management. Indices such as trophy quality and hunting effort per species provide a simple and cheap means of determining whether quotas are sustainable.
It is proposed to carry out a review by a competent consultant of the methods and indicators to be used for determining quotas for the different huntable species. The review should also include the cost-effectiveness of the monitoring efforts needed as compared to the costs of the present quota setting.

Quotas for abundant animals are not set, like warthog. It is proposed not to have a quota for kob either, given the abundance of the species in Gambella. The same applies to Salt's dikdik and possibly to other species like common duiker, common bushbuck etc..

5.2 Utilisation of quotas:

Quotas set should be used to the full. Quotas are there to be sold, thus earning money for the Government and communities. Any unsold quota is a loss for the government. Unsold quotas should therefore be sold before the end of the hunting year to other companies or licensed hunters. Companies that are not able to sell their quotas should be investigated and consequences like reassignment of blocks should be drawn.
EWCA should reserve the right to sell to others quotas not sold until 3 months to the end of the hunting season. In case of the open CHAs EWCA shall be obliged to try to sell them.
This will put pressure on the companies to step up their performance.

5.3 Allocation of hunting areas:

Allocate hunting areas transparently and based on market principles: The process of allocating hunting concessions should be as transparent as possible, and based on market principles. This is a basic approach of allocation of hunting areas nowadays practised elsewhere in Africa. This does not necessary mean auction, it could also be through a tender process. A tender does not necessarily have to be open world- or Africa-wide. If there is the political will to support the local industry, the tender or auction could be restricted accordingly. So far concessions have not been given to outside companies for various reasons, even though there is now no legislation that prohibits it.
Some tenders have been launched by regional administrations, but were badly done and without success. It is recommended that EWCA is administering the tendering or auctioning process on behalf of the regions. The tenders should be in the English language to allow international bids
It is recommended to have a "test" auction for a new hunting block in order to get a "feeling" for the interest in the market. The market has never been open and one can expect some reluctance from non-Ethiopian hunting companies to bid in an environment beset by bureaucracy, difficult procedures and high prices.

5.4 Poaching and encroachment:

Do not ask the concessionaires to do the job of the Government (managing the CHAs): CHAs are protected areas under the Ethiopian wildlife legislation and the regional Governments are responsible to ensure their proper management. Presently concessionaires are obliged to manage the blocks including antipoaching, community relations, social projects etc. Basically it is expected from the concession holder to carry out government functions which are performed elsewhere by government institutions. In view of the low value of some blocks this means to ask too much. In addition, often the expertise is not available with the outfitter. It is therefore proposed not to include the demand to manage the block in the outfitter's contract, except to render assistance in antipoaching/anti-encroachment measures on request. The regions should be asked to manage the hunting areas, there is no point in transferring a large portion of the income to them if they are not ready to invest in the management of the hunting areas. This includes providing tangible benefits for the local communities on which land the hunting takes place.

The problems associated with poaching and encroachment could be addressed by improved enforcement of the existing legislation. In Ethiopia this is easier said than done, given the bad state of law enforcement in practically all spheres of life: traffic laws, National Parks integrity, fire arms legislation, to name a few.

Apart from improved law enforcement by the state agencies EWCA and regional authorities, it should be strategy of EWCA to give communities more responsibility in the management of the hunting areas.
The starting point could be to increase interest in the hunting areas' integrity by providing tangible monetary and other benefits to the communities on which land the hunting takes place. The Oromia setup can serve as an example: the concession fee and hunting fee are paid to the Oromia Forest and Wildlife Enterprises. As Adaba-Dodola has a functioning communal tourism cooperative carrying out trekking tourism in the area, 65 % of the fees go to the cooperative. The enterprise's strategy is to include other communities in the scheme as soon as community based organisations that can absorb the influx of money are in place.

5.5 New hunting areas:

Encourage creation of new hunting areas as community conservation areas where possible: It is recommended to radically increase number and size of the hunting areas. Gambella Regional State has the highest concentrations of antelopes (the kob migration), but presently no active CHA. This deprives the region of much needed wildlife income.
There are areas in Oromia, Southern region, Somali region and Benishangul Gumuz which obviously have good numbers of wildlife, but are not hunted.
These areas should be run as community conservation areas so that a substantial part of the income goes to the communities where the hunting takes place. Potential community conservation areas are often not suitable for photographic tourism, but suited for hunting. Communities should be advised accordingly. There might also be in the future an opportunity to sell live animals to game ranches, the creation of which is Government strategy.

5.6 Prices and fees:

Increase price flexibility, based on willingness to pay and market conditions: There are strong indications that Ethiopia has priced itself out of the market. Recently EWCA has increased the trophy and other components of the price of hunting two to threefold. The prices for hunts in Ethiopia are now among the highest in Africa, even though there are no elephant and lion on quota, which are the money spinners in other countries. There has been a big drop in visiting hunters since 2009: in the last year 2005 EC only 28 hunters visited Ethiopia. This is even less than half of the 2001 EC figure (57). Quota utilisation is less than 50%.
Trophy fees should be analysed as to whether they really reflect market conditions and the willingness to pay of the hunters. For instance oryx could be increased, and Lelwel hartebeest lowered, because hartebeest are generally more widespread and thus cheaper than oryx, oryx Beisa is a hunting endemic, whereas Lelwel hartebeest can be hunted elsewhere. 4000 for the oryx and 2000 for the hartebeest seem more appropriate than the other way around.
Most hunting clients are concerned that their hunt is conducted in a ‘conservation-friendly’ manner and would likely select hunting operators with concessions where the money benefits the communities. This could increase the chance for high prices even though it will be difficult to compete in this respect with hunting in southern Africa for instance.

5.7 Flexible concession fees:

Introduce flexible concession fees, based on tender procedures: Presently several blocks are not hunted, because the operator has given back the area to the Government. The price seems to be the reason for this.
Concessions have different values. The concession fee is presently composed of a 100,000 Birr flat rate and 5% of the value of the quota. The auctioning/tendering will help determining the economic value of a block. In the meantime it is recommended to skip the 100,000 Birr flat rate and to charge a certain percentage of the quota value as concession fee in a way that it is income-neutral for Government.

5.8. Resident hunting:

Increase resident hunting by opening it is additional states and by introducing new animals: Resident hunting is expensive and thus a potential money spinner for regions and communities. It is recommended to include some other common species in the huntable species list, like Salts dikdik, common duiker, common bushbuck, and kob.

It is also recommended that regions like Gambella take up resident hunting in order to generate additional income from their wildlife. Resident hunters should be offered quota not used in the open CHAs for half the trophy fee (like with the non-quota animals).

5.9. Pre-payment of trophy fees:

Do away with the pre-payment, introduce payment after shooting: Hunters have to pre-pay the trophy fees and there is no refund if the animal is not shot. This is unique in Africa and only to be maintained when the success rate is high and the trophy fee is low in comparison to the total costs of the hunt. This is no longer the case after the recent price increases.
In comparison to actually charged daily rates (around 1000 to 1500 US$ average for 21 days) the trophy fee has been up to 2009 of minor importance in relation to the total costs of the safari. This has changed with the new prices.
It is strongly recommended to change to the shot/paid system practised elsewhere in Africa. This will have little impact on the income generated, in fact it might lead to a better quota utilisation, because hunters will be tempted to try to hunt a greater variety of game on quota. There is no risk involved for Government, because export permits for the trophies are issued by EWCA and will simply not be issued before the trophy fees are paid.

5.10. Minimum hunting days:

Drop the minimum hunting days, leave it to outfitters to maximise the hunting days: The 15 and 21 days respectively prescribed by the guidelines are above the minimum in most of the African countries. Most counties, especially with functioning taxation systems, leave it to the outfitters to maximise their hunting days, as this is the way for the companies to maximise their income. There is no flexibility in the Ethiopian system to accommodate shorter hunts depending of available quotas and the market situation.
Hunting package "flat rate" prices could also be envisaged . There are a number of countries that promote special shorter hunts for 7 to 10 days on particular animals like leopard, sitatunga, lechwe or on common plains game. It is recommended to analyse the possibility to increase the turnover of the industry by introducing this possibility, for instance for the abundant white-eared kob, leopard and other species.

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