



# ADVANCING SUSTAINABLE TOURISM

## A REGIONAL SUSTAINABLE TOURISM SITUATION ANALYSIS: SOUTHERN AFRICA

On behalf of  
**BMZ**  Federal Ministry  
for Economic Cooperation  
and Development

**giz** Deutsche Gesellschaft  
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<b>AEM</b>	African Eco-labelling Mechanism	<b>COAST</b>	Collaborative Actions for Sustainable Tourism	<b>HITT</b>	High Impact Tourism Training for the Informal Sector
<b>AENP</b>	Addo Elephant National Park	<b>COMESA</b>	Common Market for Eastern and Southern Africa	<b>IFC</b>	International Finance Corporation
<b>AFD</b>	Agence Française de Développement	<b>DBSA</b>	Development Bank of Southern Africa	<b>ILO</b>	International Labour Organisation
<b>AHRIM</b>	Association des Hôteliers et Restaurateurs – Ile Maurice	<b>DCA</b>	DolphinCareAfrica	<b>INATUR</b>	National Institute of Tourism
<b>ANGAP</b>	Association Nationale pour la Gestion Aires Protégé	<b>DEA</b>	South African Department of Environmental Affairs	<b>INEFP</b>	National Institute for Employment and Vocational Training - Mozambique
<b>ARSCP</b>	African Roundtable for Sustainable Consumption and Production	<b>DFID</b>	British Department for International Development	<b>IRDNC</b>	Integrated Rural Development and Nature Conservation
<b>ASL</b>	African Safari Lodges Program	<b>DNP-WLM</b>	Department of National Parks and Wild Life Management - Zimbabwe	<b>ITC</b>	International Trade Centre
<b>AU</b>	African Union	<b>DRC</b>	Democratic Republic of Congo	<b>IUCN</b>	International Union for the Conservation of Nature
<b>AUC</b>	African Union Commission	<b>EIA</b>	Environmental Impact Assessment	<b>KfW</b>	Kreditanstalt für Wiederaufbau
<b>AWC</b>	African Wildlife Capital	<b>FFEM</b>	Fonds Français pour l'Environnement Mondial	<b>MITUR</b>	Ministry of Tourism - Mozambique
<b>AWF</b>	African Wildlife Foundation	<b>FIAS</b>	Financial Investment Advisory Services	<b>MMF</b>	Marine Megafauna Foundation
<b>BMZ</b>	Federal Ministry of Economic Cooperation and Development	<b>FTTSA</b>	Fair Trade in Tourism South Africa	<b>N\$</b>	Namibian dollar
<b>BOT</b>	Build-Operate-Transfer	<b>GEF</b>	Global Environment Facility		
<b>CAMP-FIRE</b>	Communal Area Management Program for Indigenous Resources	<b>GiZ</b>	Deutsche Gesellschaft für Internationale Zusammenarbeit		
<b>CAPE</b>	Biodiversity Conservation and Sustainable Development Project	<b>GOS</b>	Government of Seychelles		
<b>CBNRM</b>	Community Based Natural Resource Management	<b>GRASP</b>	Great Apes Survival Partnership		
<b>CBT</b>	Community based tourism	<b>GSTC</b>	Global Sustainable Tourism Criteria		
<b>CBTE</b>	Community based tourism enterprise				

# ABBREVIATIONS AND ACRONYMS

<b>NACOBTA</b>	Namibia Community Based Tourism Assistance Trust	<b>SADC</b>	Southern Africa Development Community	<b>UNDP</b>	United Nations Development Programme
<b>NASCO</b>	Namibian Association of Community Based Natural Resource Management Support Organisations	<b>SANParks</b>	South African National Parks	<b>UNEP</b>	United Nations Environment Programme
<b>NDFFC</b>	Nyanga Downs Fly Fishing Club	<b>SCORE</b>	Sustaining Competitive and Responsible Enterprises	<b>UNESCO</b>	United Nations Educational, Scientific and Cultural Organisation
<b>NEAP</b>	National Ecotourism Accreditation Program	<b>SEED</b>	Economic expansion and diversification	<b>UNIDO</b>	United Nations Industrial Development Organisation
<b>NEPAD</b>	New Partnership for Africa's Development	<b>SETS 21</b>	National Ecotourism Strategy – Seychelles	<b>UNWTO</b>	United Nations World Tourism Organisation
<b>NGO</b>	Non-governmental organisation	<b>SGDRN</b>	Sociedade para Gestão e Desenvolvimento da Reserva do Niassa	<b>USD</b>	United States Dollars
<b>NMSRT</b>	National Minimum Standard for Responsible Tourism – South Africa	<b>SLEA</b>	South Luangwa Eco Awards	<b>USAID</b>	United States Agency for International Development
<b>NORAD</b>	Norwegian Agency for Development Cooperation	<b>SME</b>	Small and Medium Enterprise	<b>VCA</b>	Value chain analysis
<b>ODI</b>	Overseas Development Institute	<b>SMME</b>	Small, micro and medium enterprises	<b>WCPA</b>	World Commission on Protected Areas
<b>PAN</b>	Projecto Arco Norte	<b>SNV</b>	The Netherlands Development Organisation	<b>WHL</b>	World Hotel Link
<b>PEP</b>	Private Enterprise Partnership	<b>SSTL</b>	Seychelles Sustainable Tourism Label	<b>WHS</b>	World Heritage Site
<b>PIC</b>	Integrated Growth Poles Project	<b>ST-EP</b>	Sustainable tourism eliminating poverty	<b>WMA</b>	Wildlife Management Areas
<b>PPF</b>	Peace Parks Foundation	<b>STNSA</b>	Sustainable Tourism Network Southern Africa	<b>WWF</b>	World Wide Fund for Nature
<b>PPP</b>	Public private partnership	<b>TANAPA</b>	Tanzania National Parks	<b>ZAWA</b>	Zambia Wildlife Authority
<b>PSD</b>	Private Sector Development	<b>TAPAS</b>	Tourism and Protected Areas Specialist Group		
<b>RDC</b>	Rural District Council	<b>TEP</b>	Tourism Enterprise Program		
<b>RETOSA</b>	Regional Tourism Organisation of Southern Africa	<b>TFCA</b>	Transfrontier Conservation Area		
<b>RTTZ</b>	Responsible Tourism Tanzania	<b>UNCTAD</b>	United Nations Conference on Trade and Development		

# ABBREVIATIONS AND ACRONYMS



# EXECUTIVE SUMMARY

Against the background of the importance of tourism to the economies of southern Africa, the purpose of this study was to provide a situational assessment and analysis of the sustainable tourism activities, needs and priorities of countries in Southern Africa<sup>1</sup>; barriers to mainstreaming sustainability in tourism and recommendations for overcoming them; and an overview of stakeholders and funders implementing and enabling sustainable tourism initiatives in the region.

The approach used was a literature review and stakeholder consultation involving an online questionnaire and virtual meeting to discuss the results of the analysis.

Similar exercises are being undertaken by the United Nations Environment Programme (UNEP) in two other regions.

<sup>1</sup> Angola, Botswana, Democratic Republic of Congo, Lesotho, Malawi, Mauritius, Mozambique, Madagascar, Namibia, Swaziland, Tanzania,

## / Key Findings

Most countries in southern Africa have sustainable tourism products and services, and the majority has conservation and economic development projects that support sustainable tourism development. Fewer countries have training and capacity building initiatives for sustainable tourism, or strategies and policies to underpin it.

Government-level and regional frameworks for sustainable tourism development across the region include tourism policies, strategies and white papers; tourism masterplans emphasising the need for poverty reduction through tourism and national ecotourism policies.

Substantial innovation has been demonstrated in the development of sustainable tourism products and services, including joint venture partnerships and community-based tourism enterprises. Many private sector operators facilitate biodiversity conservation; generate economic benefits for local people through employment and procurement opportunities; and enrich the social and cultural environment.

Various forms of technical tools and guidance for sustainable tourism include guidelines, standards, certification programs, manuals and toolkits, and value chain analysis tools. Two main networking bodies in

Southern Africa currently promote sustainable tourism across the region.

Principal challenges and barriers to mainstreaming sustainable tourism include a lack of understanding of sustainable tourism by the public and private sectors, and insufficient incentives to operate sustainably. Other barriers include policy barriers; finance constraints; a lack of tools; negative impacts of tourism and poor stakeholder relationships and host communities.

Sustainable tourism priorities include effective national tourism development strategies and cross-sectoral policies; improved regional cooperation; an investment-friendly enabling environment and capacity development; increasing awareness and understanding of conservation of natural resources among local communities, government officials, tourism operators and tourists. Other priorities include integrating sustainability criteria into finance options, land leases and concession agreements, having destination plans integrating sustainable tourism, and awareness raising among travellers and the tourism industry.

Key needs are to improve the understanding of basic principles of tourism and tourism resources, options for local communities, environmental, social and cultural management of tourism, impacts of tourism, and sustain-

able tourism principles. Key requirements to mainstream sustainability into tourism include demand from tourists for sustainable travel, secure land tenure, attractive destinations, political and economic sustainability, realistic expectations of communities, and good governance and transparency.

Key factors in overcoming the constraints to mainstreaming sustainable tourism include: long term commitment and relationships, credibility with communities and governments, the concept of sustainability underpinning tourism activities; working at scale and networking operations, and marketing clout and experience in community ventures.

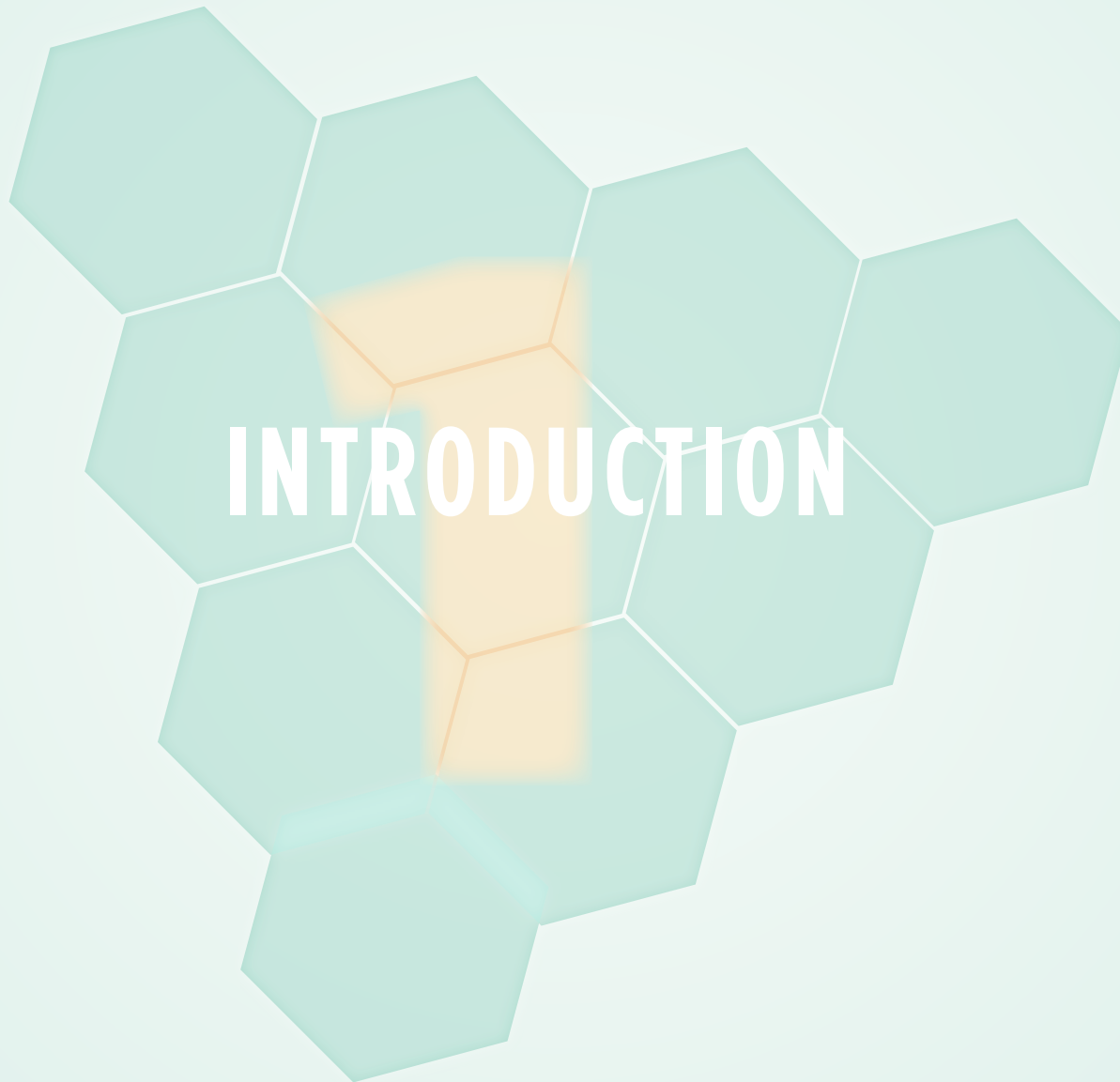
Opportunities are presented through the region's key implementers, supporters, and innovators of sustainable tourism. They include regional bodies, bilateral and multilateral organisations, the private sector and NGOs, who provide funding and/or support for sustainable tourism activities and initiatives.

### / Key recommendations

The four main recommendations that arose for future project interventions to mainstream sustainable tourism were:

- **1. Tourism products and services:** A greater supply of sustainable tourism products needs to be stimulated in order to reach a 'tipping point' where sustainable practices are the norm in the region. Therefore incentives and technical support for sustainable tourism developments are needed, as are mechanisms to ensure that sustainable products have preferential market access.
- **2. Training and capacity building** for people working within government agencies, tourism boards and protected area agencies. They have a key role in developing and promoting sustainable tourism, and sustainability must be fully integrated into their work.
- **3. Technical tools and guidance,** in accordance with country priorities. Research should be undertaken to establish the business case for sustainable tourism, particularly on cost-savings and improved market access. Tools need to be provided in a balanced manner, to reflect social and economic as well as environmental sustainability.
- **4. Networking** organisations need support to build relationships and linkages between people working on sustainable tourism, and those that need to be encouraged to do so.





## / 1.1 Scope and purpose

The purpose of this study was to provide a situational assessment and analysis of the sustainable tourism activities, needs and priorities of countries in Southern Africa<sup>2</sup>.

## / 1.2 Objectives

The aim of this report is to provide analysis of:

- Current sustainable tourism initiatives in southern Africa;
- Challenges and barriers to sustainable tourism, and approaches to overcoming them;
- Needs and priorities of those working to strengthen sustainable tourism development in the region;
- Opportunities to mainstream sustainable tourism through stakeholders working on sustainable tourism at a regional level; and
- Recommendations for high impact interventions to mainstream sustainable tourism.

## / 1.3 Methodology

The evaluation entailed a literature review, an online questionnaire and a virtual meeting:

- i) Review of the available online literature and consultancy reports addressing sustainable tourism in the region;
- ii) Online questionnaire sent to 170 contacts of the consultant, UNEP, and the Sustainable Tourism Network Southern Africa (STNSA) which yielded a 29% completion rate (50 respondents);
- iii) Virtual meeting, hosted by UNEP and attended by seven participants. A brief overview was given of the results of this situational analysis, and the project concepts suggested by stakeholders and the literature.

## / 1.4 Limitations

Any situational analysis of this type is limited by the information readily available in the literature, online, and of which consulted stakeholders are aware. There may therefore be additional sustainable tourism initiatives in southern Africa not described in this study.

# SITUATION ANALYSIS

## Current sustainable tourism initiatives in Southern Africa

The status of sustainable tourism in southern Africa is discussed under six key themes:

- Strategies and policies;
- Tourism products and services;
- Training and capacity building;
- Technical support and guidance;
- Conservation and economic development initiatives; and
- Networks.

<sup>2</sup> Angola, Botswana, Democratic Republic of Congo, Lesotho, Malawi, Mauritius, Mozambique, Madagascar, Namibia, Swaziland, Tanzania, Zambia, Zimbabwe, Seychelles, and South Africa

Table 1 below provides a brief overview of the types of sustainable tourism initiatives identified in Southern Africa in relation to the above key themes. This indicates that most countries have tourism products and services that are considered sustainable, and the majority has conservation and economic development projects that support sustainable tourism development. Fewer countries have training and capacity building initiatives for sustainable tourism, or strategies and policies to underpin it.

**Table 1:** Overview of sustainable tourism initiatives in southern Africa

	Strategies & Policies	Tourism Products and Services	Training & Capacity Building	Technical Tools & Guidance	Conservation and Economic Development Projects	Networks
Regional initiatives	✕	✕	✕	✕	✕	✕
Angola					✕	
Botswana	✕	✕	✕	✕	✕	
DRC	✕		✕		✕	
Lesotho		✕				
Madagascar	✕	✕	✕	✕	✕	
Malawi	✕	✕				
Mauritius		✕		✕	✕	
Mozambique	✕	✕	✕	✕	✕	
Namibia	✕	✕		✕	✕	
Seychelles	✕	✕		✕	✕	
South Africa	✕	✕	✕	✕	✕	
Swaziland	✕	✕				
Tanzania & Zanzibar		✕	✕		✕	✕
Zambia		✕		✕	✕	
Zimbabwe	✕	✕				

## / 2.1 Strategies and Policies

Strategies and policies established by governments, and regional bodies representing them, can provide the framework for sustainable tourism development across the region. Notable policy instruments which specifically incorporate sustainability and responsible tourism principles such as community participation and local linkages include Botswana’s Tourism Policy (1990 and its revised draft of 2008); Madagascar’s new government strategy: “Diversification, Employment, Training, Investments and Sectoral Synergies” (DEFIS 2017); the Seychelles’ “Vision 21” and the 1996 South African “White Paper on the Development and Promotion of Tourism”.

Tourism masterplans in countries including Botswana, Madagascar, Mozambique, and Namibia emphasize the need for poverty reduction through employment, ownership and the delivery of products and services in the industry<sup>3</sup>. Countries that have ecotourism policies (i.e. prioritising sustainable nature-based tourism) include Botswana, Malawi, and the Seychelles<sup>4</sup>. These are countries rich in natural resources: a strong focus of the tourism supply chain.

At the regional level, the African Union/New Partnership for Africa’s Development (AU/NEPAD) strategic focus is outlined in its “Tourism Action Plan for the Africa Union (AU)/New Partnership for Africa’s Development (NEPAD)”. A main objective is to provide an engine for growth and integration and to contribute to poverty eradication<sup>5</sup>.

<sup>3</sup> Spenceley and Rozga, 2007

<sup>4</sup> MTT, 2003; COMESA, 2012

<sup>5</sup> UNWTO, 2006, cited but not referenced in Anon, undated



## / 2.2 Tourism Products and Services

Substantial innovation has been demonstrated in Southern Africa in the development of sustainable tourism products and services. In the accommodation sector, these include:

■ **Joint-venture partnerships:** generally between private sector operators and community members. Sometimes the partnerships are broader, as public-private partnerships (PPPs), and also incorporate a government agency, such as conservation agencies that have tenure over the land used for development. Such partnerships promote sustainable operation practices as they give opportunity for marginalized communities to participate in a meaningful way in the tourism industry, and gain equity, employment, training opportunities and dividends, while the private sector brings business expertise and market linkages to the partnership. There are notable joint-venture partnerships operating in countries including Mozambique, Namibia, and South Africa<sup>6</sup>. Some of the difficulties include high transaction costs associated with planning and development, low capacity and skills of communities that partner with the joint venture, and sometimes rigid development options applied by conservation agencies.

■ Community-based tourism enterprises (CBTEs) tend to have three main characteristics: They are: (1) located within a community (e.g. on communal land, or with community benefits financially from leasing land for development); or (2) owned by one or more community members (i.e. for the benefit of one or more community members); or (3) are managed by community members (i.e. community members could influence the decision-making process of the enterprise)<sup>7</sup>. In terms of sustainable tourism, CBTEs are important because they provide communities with direct access to the industry, and with opportunities for ownership and employment. A review of 218 CBTEs in 12 southern African countries<sup>8</sup> undertaken in 2006 through a UNWTO/RETOSA project found that benefits people gained from the enterprises included access to finance, employment, community infrastructure development, training, and the purchase of their products. However, their main limitations were physical access (i.e. remote locations), followed by market access, advertising, motivation and communications<sup>9</sup>. The review was also used as a basis for developing a CBTE online database to facilitate bookings<sup>10</sup>.

Many private sector operators have made impressive achievements in the conservation of biodiversity at locations where they work, generating economic benefits for local people through employment and procurement opportunities, and enriching the social and cultural environment.

At least 340 accommodation facilities have been recognized for their sustainable business practices, through third-party certification, international awards, or inclusion on an online booking platform that promotes sustainable products. These accolades are notable for the operations involved, but level of uptake currently represents a fraction of all tourism enterprises across the region.

## / 2.3 Training and Capacity Building

Training and capacity building are vital for creating the human resource base that countries need to develop their tourism industry sustainably. One of the problems identified through this study in implementing tourism sustainably is the lack of widespread understanding among all stakeholder groups of what 'sustainable tourism' is, its importance, its implications for conservation and poverty reduction, and how it can be implemented. In recognition of this, a number of interventions have worked on building skills and expertise in sustainable tourism in the region, such as in Madagascar, Mozambique, and South Africa.

<sup>6</sup> Names of operations not provided here, in the interest of not promoting specific private sector operators in a UN report.

<sup>7</sup> Spenceley, 2008

<sup>8</sup> Botswana, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, South Africa, Swaziland, Tanzania, Zambia and Zimbabwe

<sup>9</sup> Spenceley, 2008

<sup>10</sup> However, since UNWTO funding for the site ceased, the information has been taken offline and is no longer available.

## / 2.4 Technical Tools and Guidance

Various forms of technical tools and guidance for sustainable tourism include guidelines, standards, certification programs, manuals and toolkits. Some notable examples are:

- **Guidelines and standards** include South Africa's National Responsible Tourism Guidelines (2002)<sup>11</sup> which led to the National Minimum Standard for Responsible Tourism (NMSRT) in 2011. The NMSRT aims to establish a common understanding of responsible tourism, harmonize different sets of criteria currently used across the country, and be the baseline standard for all tourism businesses<sup>12</sup>. Other countries with national sustainable tourism standards include Botswana and the Seychelles. The Regional Tourism Organisation of Southern Africa (RETOSA) is currently harmonising regional tourism quality standards, aiming to have 70 sustainable tourism criteria included<sup>13</sup>. Eco Mark Africa has drafted a tourism standard for serviced accommodation providers, to support an African Eco-labelling Mechanism<sup>14</sup>.
- Various countries have developed **manuals and handbooks** to provide technical information to support sustainable tourism, including South Africa's Responsible Tourism Manual and Handbook<sup>15</sup>; Botswana's Ecotourism Best Practices Manual; Mauritius' Handbook of Best Environmental Practices for the private sector. The last two mentioned, received the financial support of the Commonwealth Secretariat. The International Finance Corporation's (IFC) "Private Enterprise Partnership (PEP) Africa" helped the Pro-Poor Tourism Consortium develop "How to...?" guides to provide concrete examples and suggestions that the private sector could implement<sup>16</sup>.

- **Certification programs** operate at a national level in Botswana, Madagascar, Namibia, the Seychelles and South Africa, and others operate regionally and internationally. Some have been developed by government bodies (i.e. Botswana, Seychelles); others by the private sector or NGOs (e.g. in Namibia and South Africa). These have certified 229 tourism activities and accommodation facilities in the region.

Some standards and certification programs have been aligned with the Global Sustainable Tourism Criteria for hotels and tour operators. These include the standards from Botswana, the Seychelles and South Africa, and certification by Fair Trade in Tourism South Africa (FTTSA). Among these, the FTTSA standards are officially recognized by the Global Sustainable Tourism Council (GSTC) as being in accordance with its Criteria for hotels and tour operators<sup>17</sup>.

Tools developed internationally and applied in Africa, include value chain analysis tools for tourism, used by the International Trade Centre of the United Nations Conference on Trade and Development (UNCTAD), the Overseas Development Institute, and the Netherlands Development Organisation (SNV). These tools are used in destinations including Botswana, Mozambique, the Seychelles and Tanzania to establish the extent to which local people benefit financially from tourism supply chains, assess challenges to maximising opportunities and to design and implement interventions that enhance local linkages and benefits.

<sup>11</sup> STNSA, 2012: pp9

<sup>12</sup> STNSA, 2012: pp10

<sup>13</sup> <http://www.sustainabletourismalliance.co.za/about-stnsa/>

<sup>14</sup> STNSA, 2012: pp 15-16. Partners in this initiative include the African Union Commission (AUV), the African Roundtable for Sustainable Consumption and Production (ARSCP), the United Nations Environment Programme (UNEP), UN Industrial Development Organisation (UNIDO), and GiZ.

<sup>15</sup> STNSA, 2012: pp9

<sup>16</sup> Spenceley and Rozga, 2007

<sup>17</sup> <http://www.gstcouncil.org/sustainable-tourism-gstc-criteria/gstc-recognized-standards.html>

## / 2.5 Major Conservation and Economic Development Initiatives

Major investment has been made in conservation and economic development projects in southern Africa, where a component includes support to tourism. Typically, a project would be a multi-million-US\$ initiative, spanning 3 to 5 years, and focusing on biodiversity conservation and protected area management, and/or poverty reduction and economic development. Agencies supporting such programs include the World Bank, the IFC, USAID, UNDP, UNWTO, UNIDO, GiZ, and also NGOs such as Conservation International and WWF.

These types of interventions provide significant investment in southern Africa, and opportunities to make tangible impacts on biodiversity conservation and poverty reduction through sustainable tourism. Many of the programs dealing with protected areas and tourism promote the use of tourism concessions and licensing as a tool for raising revenue and management.

## / 2.6 Networks

Networks have an important role to play in linking like-minded stakeholders across the region and providing opportunities to share knowledge. Two main networking bodies in southern Africa promote sustainable tourism:

- The Sustainable Tourism Network Southern Africa (STNSA) aims to provide an integrated, regional approach to sustainable tourism development in SADC as well as a channel for exchanging experiences and best practices regarding sustainable tourism policy and practice throughout the region. Membership is open to all interested parties including civil society organisations, certification programmes, tourism authorities, tourism associations, government departments/ministries, travel and tourism businesses and academics. The network communicates with its members via a website, an on-line forum and a quarterly newsletter<sup>18</sup> and hosts an annual conference on sustainable tourism at the tourism Indaba in South Africa (the largest travel trade show in southern Africa).

- Responsible Tourism Tanzania (RTTZ) aims to encourage the Tanzanian tourism industry to sustainability, providing support through: internationally accepted standards and guidelines; an auditing and evaluation process; a certification scheme; lobbying and advocacy to develop policies and regulations; information and practical ideas, tools and training to assist enterprises to practice responsible tourism, and promotion of responsible operators and products to the international tourism market<sup>19</sup>.

<sup>18</sup> <http://www.sustainabletourismalliance.co.za/about-stnsa/>

<sup>19</sup> STNSA, 2012: pp 10-11; Stakeholder survey



# CHALLENGES AND BARRIERS TO SUSTAINABLE TOURISM IN SOUTHERN AFRICA

This section discusses barriers to mainstreaming sustainable tourism and recommends approaches to overcoming them, based on the literature and stakeholder survey.

## CHALLENGES AND BARRIERS TO MAINSTREAMING SUSTAINABLE TOURISM

Survey respondents rated the relative importance of a number of barriers to mainstreaming sustainable tourism. Their feedback, summarized in Figure 1 below, shows that all the barriers identified were considered “important” by a majority of respondents. Those most frequently rated as important included “lack of understanding of sustainable tourism” by public and private sectors, and “insufficient incentives to operate sustainably”.

Figure 1: How important are the following barriers to mainstreaming sustainable tourism in Southern Africa?



Other barriers that were highlighted, but not rated, in the survey included<sup>20</sup>:

**Policy barriers:** A lack of political buy-in to sustainable tourism, including a lack of willingness by state agencies to give communities tenure within natural areas where they could own land and concession rights; regulatory challenges, including restrictive planning processes; and the difficulty of establishing new tourism destinations, due to the limited supporting infrastructure and services.

**Finance issues:** A lack of steady interest by donors in the tourism agenda; high costs of creating/securing access (e.g. access to funds; achieving sufficient financial returns to ensure continued conservation and community support); high transaction costs for the private sector and NGOs in developing joint-venture partnerships<sup>21</sup>; lack of funding for research to develop sustainable tourism case studies and best practice examples; and "leakage", whereby the economic benefits of local tourism activity flow out of the local community and country back to foreign corporations.

**Low awareness:** Lack of a common understanding of what sustainable tourism and "ecotourism" means (including by tourists); a lack of perceived importance of sustainable tourism among people working in the private and public sector, and some companies paying lip service to sustainable tourism without really understanding it, or "greenwashing".

**Lack of tools:** Lack of voluntary certification programs throughout all Southern African countries; prohibitively expensive certification schemes; no uniform system for assessment of sustainability, and no penalty for non-compliance.

**Negative impacts of tourism:** Degradation of resources in sensitive habitats, failing to ensure the disposal of sewage, wastewater and solid waste is properly managed; increased prevalence of prostitution, crime, and migrant and child labour; commodification of cultural heritage resources, and failing to recognize the cultural value of events or products so that they are more attractive or more frequently available to tourists;

**Poor relationships with host communities:** Unrealistic expectations by communities (fuelled by uninformed NGOs and governments that promise more than can be delivered); low levels of literacy; conflicts between tourism operators and local people, in relation to their traditional resource and land use practices (e.g. farming, hunting, fishing).

**The tourism industry** being in a depressed state resulting in short term cost reductions by operators, reducing the incentive for more costly investments but which would offer long-term benefits.

Regarding the specific barrier of a 'lack of understanding of sustainable tourism by the public sector': a 2007 IFC market research study examined the supply and demand for tourism training in nine African countries. It highlighted that skills needed by public sector employees fell into two categories: destination planning and destination management. Key problems identified with tourism training were scarcity of local trainers, poorly designed training, no follow-up, and trainers with poor communication skills. Specific needs included a greater understanding of tourism and conservation, of environmental impacts, and of options available to local communities in the tourism industry<sup>22</sup>.

<sup>20</sup> Stakeholder survey; Anon, undated; Spenceley, 2010a

<sup>21</sup> Spenceley, 2010a

<sup>22</sup> Spenceley and Rozga, 2007

## / 4.1 Sustainable Tourism Priorities

Policy recommendations from a World Bank study to overcome barriers facing sustainable tourism in sub-Saharan Africa included<sup>13</sup>:

**National tourism development strategies:** should be well-conceived, properly articulated and realistic and with multi-year tourism policy objectives developed through a multi-stakeholder process, involving social, economic and environmental sectors. Policies should be developed with strong input by local communities in planning, decision making and service delivery; foster local involvement and control over tourism development; minimize leakage; contribute to raising gender awareness and enhance women's participation in and contribution to the tourism sector; and be pro-poor; whilst ensuring required tourism services quality standards are met. An alternative livelihood must be provided where tourism development leads to reduced access to local common resources for the local population.

**Cross-sectoral policies** aimed at encouraging tourism development: including aspects of enhancing public health and safety, air transportation, policy, human resources development, institutional capacity and environmental protection.

**Regional cooperation:** Most countries in the region often face similar problems and could benefit from cross-pollination of ideas and resources.

**Investment-friendly enabling environment:** An appropriate legal framework to support tourism is needed in the region, which attracts foreign direct investment whilst ensuring equity in tourism benefits-sharing between communities, investors and governments, within a framework of triple bottom line sustainability. This may include forging private-public sector partnerships for tourism development to further expand tourism entrepreneurial initiatives and investment opportunities.

**Capacity development:** Increasing awareness and understanding of conservation of natural resources among local communities, government officials, tourism operators and tourists.

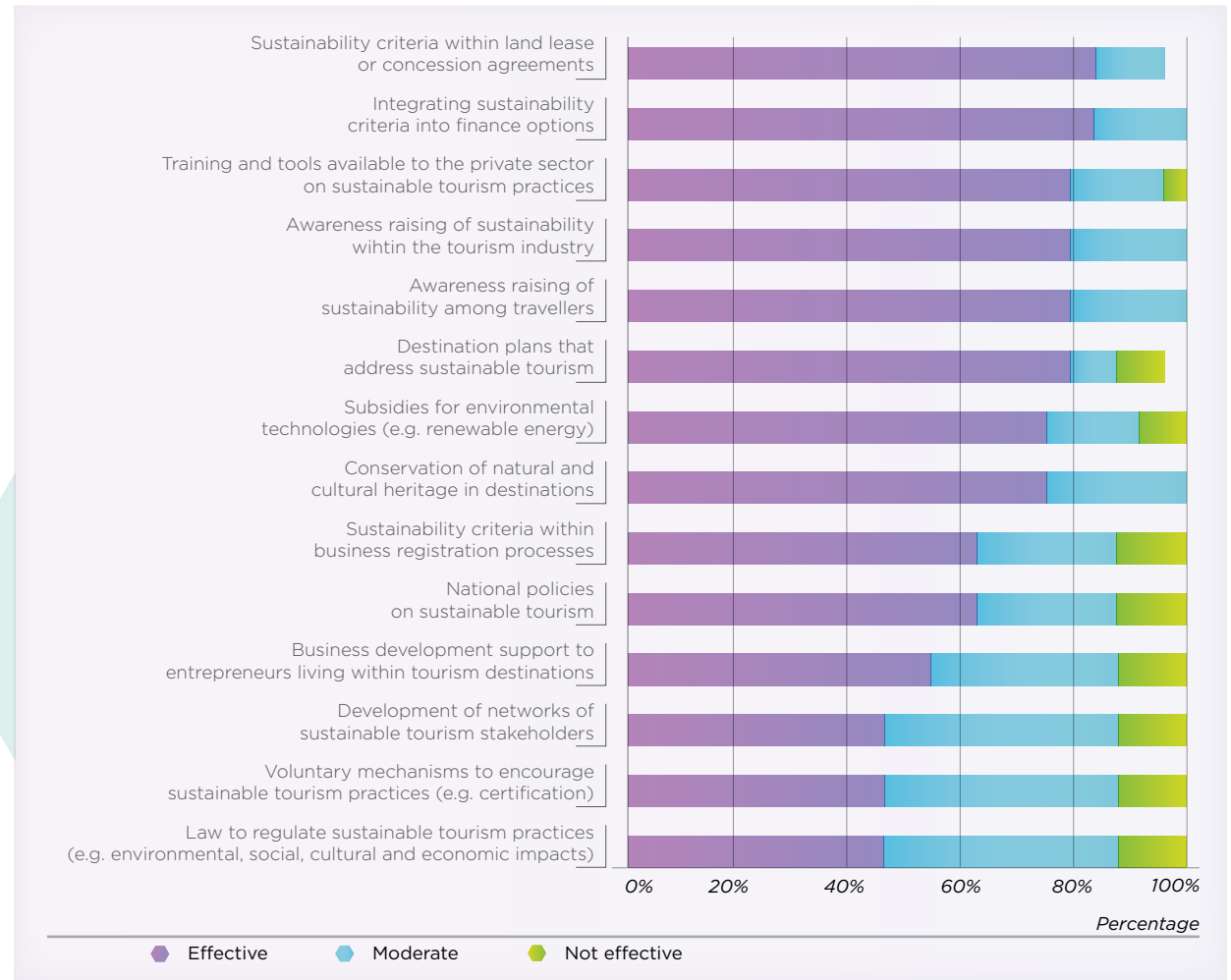
Stakeholders participating in the online survey rated the relative effectiveness of a range of activities with regards to how effective they would be in mainstreaming sustainable tourism in Southern Africa (see figure 2 below). All the activities suggested were rated as 'effective' by the majority of respondents. A majority of respondents agreed on integrating sustainability criteria into finance options, land leases and concession agreements, plus having destination plans integrating sustainable tourism, and awareness raising among travelers and the tourism industry. Additional suggestions made by stakeholders included monitoring and enforcement, as well as programs for incentives and awards for innovations with penalties for unsustainable practices. Sharing information on sustainability with the private sector was also considered as useful, including cost-benefit examples of implementing sustainable tourism practices.

# NEEDS AND PRIORITIES: APPROACHES TO OVERCOMING THE BARRIERS

<sup>13</sup> Spenceley, 2010a



Figure 2: What type of activities would be most effective in mainstreaming sustainable tourism in Southern Africa?



## 4.2 Needs: Requirements for Strengthening Sustainable Tourism Development

The survey respondents were asked to rate the relative importance of different training and capacity needs for public institutions working on sustainable development.

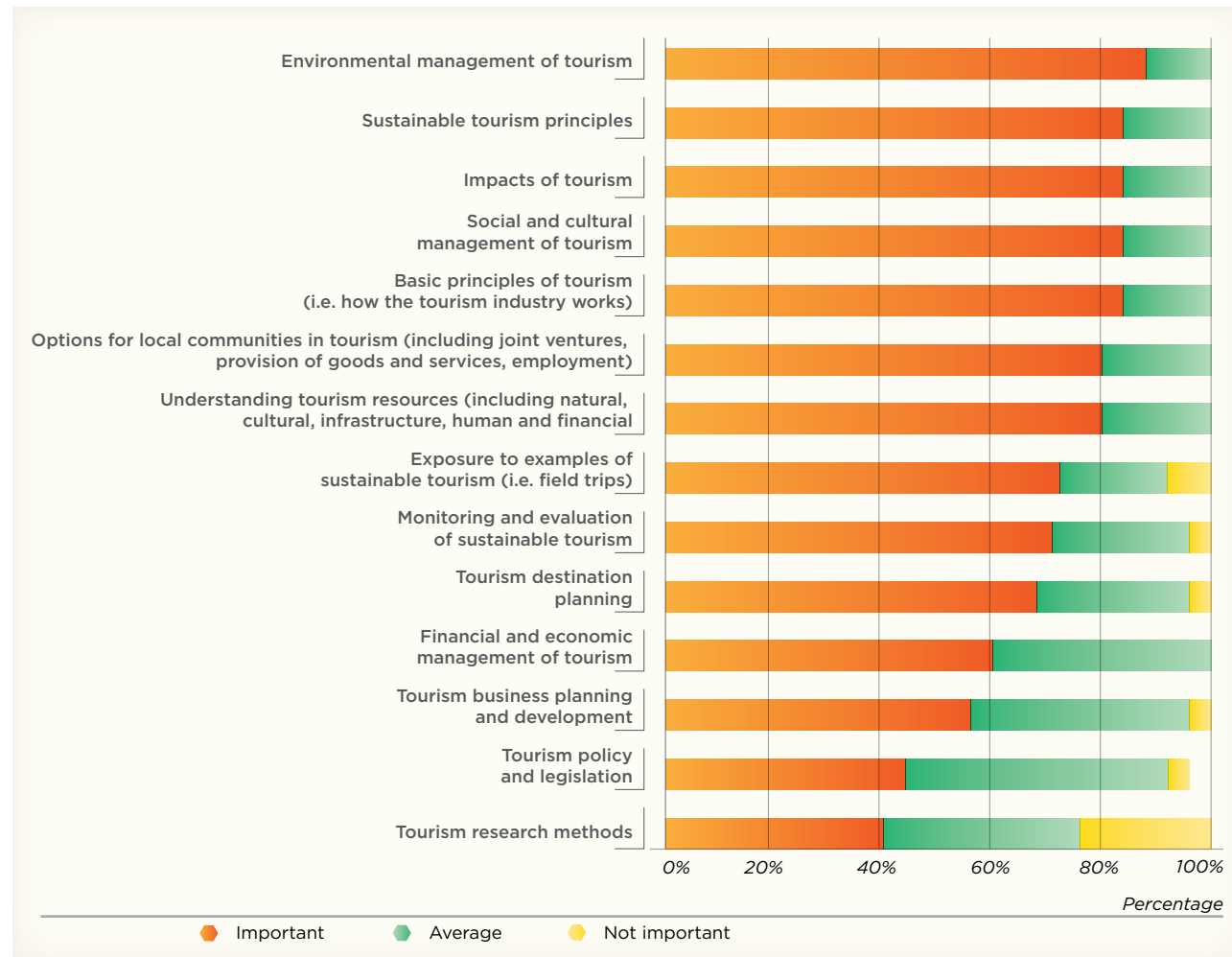


Figure 3: How important are the following training and capacity building needs for public institutions dealing with sustainable tourism development?

All the listed needs except “tourism policy and legislation” were rated as ‘important’ by the majority of respondents. The issues most frequently rated as ‘important’ were basic principles of tourism, understanding tourism resources, options for local communities, environmental, social and cultural management of tourism, impacts of tourism, and sustainable tourism principles. One stakeholder added that it was important to ensure that fully qualified and experienced people were employed in the first place. Another noted that instability in public sector entities meant that capacity building is a continuous process, and that training programs should be practical and easy to understand.

Survey respondents were also asked to rate the relative importance of a series of conditions for private sector development and operation of sustainable tourism. The results, in Figure 4 below, show that all the factors except one were rated as ‘important’. The most frequent ‘important’ rating were: demand from tourists for sustainable travel, secure land tenure, attractive destinations, political and economic sustainability, realistic expectations of communities, and good governance and transparency<sup>24</sup>. Additional comments from stakeholders included that there needs to be a realisation within the private sector that operating sustainably equates to operating efficiently which in turn equates to cost savings and a more financially viable operation. Sustainable tourism businesses should strive to develop competitive advantages by demonstrating tangible evidence of sustainable tourism best practice policies and procedures, regardless of political and economic stability. Additionally, supply should ideally match demand for sustainable travel from tourists.

<sup>24</sup> see also Spenceley, 2010a

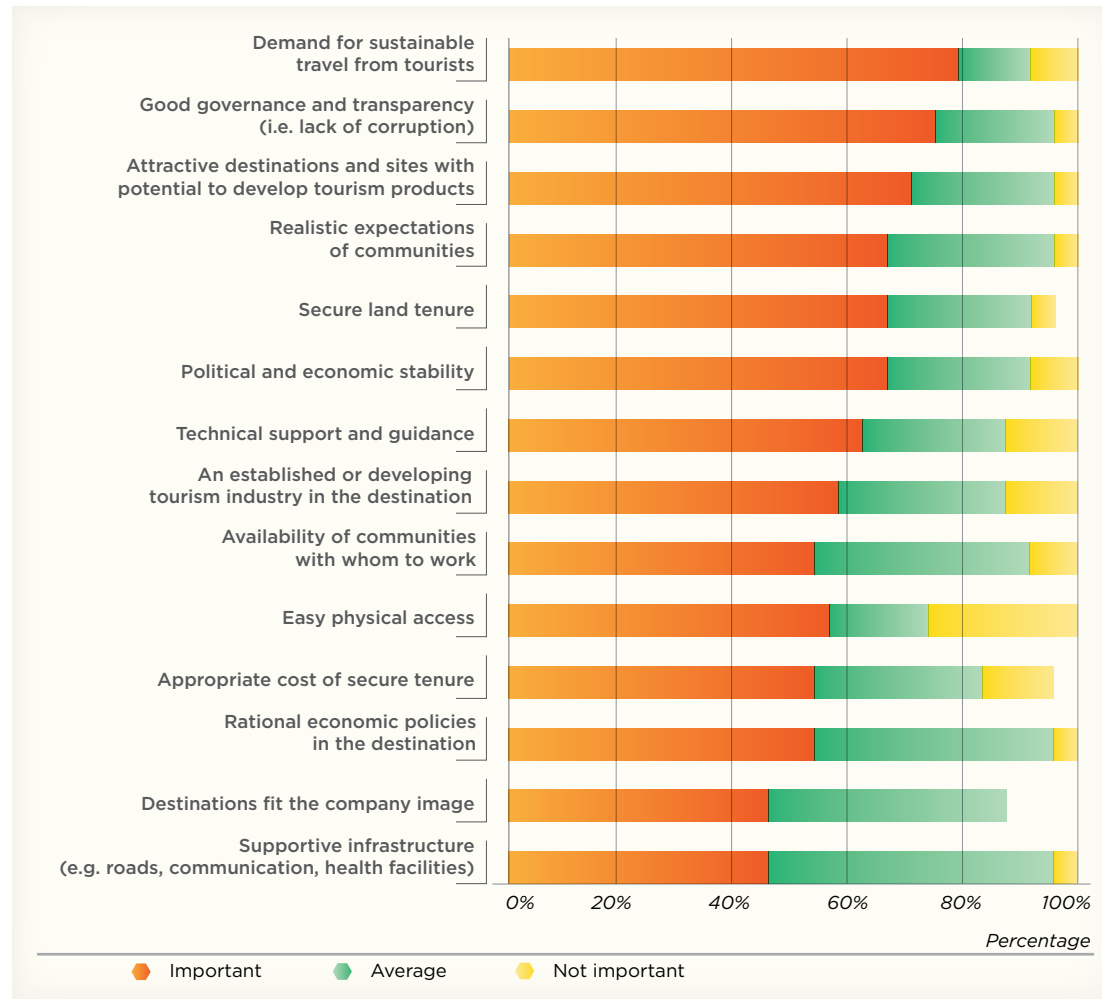


Figure 4: What conditions does the private sector need to develop and operate sustainable tourism businesses in Southern Africa?

Key factors in overcoming the constraints to practicing sustainable tourism include: long term commitment and relationships; credibility with communities and governments, the concept of sustainability underpinning tourism activities, working at scale and networking operations, and marketing clout and experience in community ventures.

# OPPORTUNITIES FOR MAINSTREAMING SUSTAINABILITY INTO THE TOURISM SECTOR: THROUGH IMPLEMENTATION, SUPPORT AND INNOVATION

## / 5.1 Sustainable Tourism Stakeholders

The key players in sustainable tourism in the region are also the major implementers, supporters and innovators. They include regional bodies, bilateral and multi-lateral organisations, private sector and non-governmental organisations (NGOs), which provide funding and/or support for sustainable tourism initiatives.

## / 5.2 Regional bodies

Two main regional bodies working on sustainable tourism in Southern Africa have strategic importance for implementing sustainable tourism initiatives on a regional scale:

**Common Market for Eastern and Southern Africa (COMESA)**<sup>25</sup>: its strategy promotes adopting a common definition of sustainable tourism; developing a code of conduct including environmental and cultural preservation; development of sustainable tourism indicators; encouraging voluntary certification schemes; development of policies, guidelines and products for cultural and community tourism; marketing COMESA as a sustainable tourism region; and undertaking research on the impact of the tourism industry on the natural and cultural environment<sup>26</sup>.

**Regional Tourism Organisation of Southern Africa (RETOSA)**: is the regional marketing and promotion organisation for SADC countries, managed by a board comprising national tourism authorities and tourism private sector umbrella bodies drawn from the region<sup>27</sup>. Apart from its role in harmonising regional tourism quality standards, RETOSA's mandate also includes development of a regional framework for transitioning Southern Africa into a regional "green/ eco" destination for tourism<sup>28</sup>.

Numerous agencies provide funding and technical development assistance in the region.

<sup>25</sup> southern African member countries include DRC, Malawi, Madagascar, Mauritius, Seychelles, Swaziland, Zambia and Zimbabwe

<sup>26</sup> COMESA, 2012 <sup>27</sup> <http://www.retosa.co.za/about-retosa> <sup>28</sup> Stakeholder survey



### / 5.3 Bilateral Agencies

Bilateral agencies form agreements with governments to provide support on a country-by-country basis. Some examples of those with programs in southern Africa on tourism include <sup>29</sup> the Commonwealth Secretariat (ComSec); Norwegian Agency for Development Cooperation (NORAD); Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) <sup>30</sup> (formerly GTZ); and United States Agency for International Development (USAID).

Other agencies with projects on sustainable tourism in Southern Africa, but which are not necessarily part of a broader program on this theme include the Agence Française de Développement (AFD) of the Government of France, the British Department for International Development (DfID), Kreditanstalt für Wiederaufbau (KfW), and the Swiss State Secretariat for Economic Affairs (SECO) <sup>31</sup>.

### / 5.4 Multilateral Agencies

Multilateral development agencies provide financial support and professional advice for economic and social development activities in developing countries <sup>32</sup>. Some with programs in the region include: International Finance Corporation (IFC) and the World Bank's "African Finance and Private Sector Development" program; United Nations Conference on Trade and Development (UNCTAD); United Nations Educational, Scientific and Cultural Organisation (UNESCO); United Nations Environment Programme (UNEP); and the United Nations World Tourism Organisation's (UNWTO) Sustainable Tourism Eliminating Poverty (ST-EP) program.

There are also other agencies with particular projects on sustainable tourism in southern Africa, but which are not part of a broader program on this theme. These include the United Nations Development Programme (UNDP), United Nations Industrial Development Organisation (UNIDO), and the International Labour Organization (ILO).

### / 5.5 Private Sector

The private sector's role and responsibilities in sustainable tourism should not be underestimated. The business of tourism involves the concept of matching supply with demand to generate profit. Working within the enabling environment provided by governments, the private sector has impacts on the local economy, through employment and procurement, on the natural environment from the way in which infrastructure is developed, product and service offerings, tours and use of resources; and on the society and culture in which they operate and commercialize <sup>33</sup>.

In terms of sustainable tourism, enterprises tend to operate independently of one another, rather than collaboratively through umbrella associations or networks. A number of enterprises across the region have been recognized by international awards or certification bodies as operating sustainably.

### / 5.6 Non-Governmental Organisations

The NGO and not-for-profit sector has mixed success in tourism in the region. In the best situations, they access funds, they provide high quality technical expertise on nature conservation, deliver capacity building

and training for local people, and link local entrepreneurs with the private sector. In the worst instances, they finance tourism infrastructure development for communities that does not match demand, expect local communities to manage sophisticated tourism businesses and share the benefits equitably (for example, numerous community-based tourism enterprises in Southern Africa <sup>34</sup>), or raise unrealistic expectations of what tourism can deliver <sup>35</sup>. However a number of major NGOs working in southern Africa are doing impressive work on sustainable tourism <sup>36</sup>. These have recently included the African Safari Lodges Program (ASL); the African Wildlife Foundation; Conservation International (CI); International Union for the Conservation of Nature (IUCN); Peace Parks Foundation (PPF); SNV; Sustainable Tourism Network Southern Africa (STNSA) and World Wide Fund for Nature (WWF).

Other NGOs with more discrete programs that address sustainable tourism include the Carr Foundation, Environment Africa, Ford Foundation, the Frankfurt Zoological Society, the International Centre for Responsible Tourism – South Africa (ICRT-SA), Namibia Community Based Tourism Assistance Trust (NACOBTA), Integrated Rural Development and Nature Conservation (INDRC) and Open Africa.

<sup>29</sup> Adapted from Spenceley, 2010a

<sup>30</sup> <http://www.giz.de/>

<sup>31</sup> SIPPO, 2010

<sup>32</sup> Adapted from Spenceley, 2010a

<sup>33</sup> Spenceley, 2010

<sup>34</sup> See for example Spenceley, 2008a; Dixey, 2008; Ashley et al, 2008

<sup>35</sup> Spenceley, 2010a

<sup>36</sup> Adapted from Spenceley, 2010a

	Bilateral agencies				Multilateral agencies						NGOs							
	ComSec	GIZ	NORAD	USAID	IFC	UNCTAD	UNESCO	UNEP	UNWTO	World Bank	ASL	AWF	CI	IUCN	PPF	SNV	STNSA	WWF
Regional		✘							✘	✘				✘			✘	
Angola						✘										✘		
Botswana	✘						✘				✘	✘			✘	✘		
DRC		✘					✘	✘				✘						
Lesotho																✘		
Madagascar		✘			✘		✘		✘	✘			✘					✘
Malawi			✘				✘											
Mauritius	✘																	
Mozambique			✘	✘	✘	✘	✘	✘	✘	✘	✘	✘		✘				✘
Namibia							✘			✘	✘			✘	✘			✘
Seychelles	✘						✘	✘										
South Africa		✘	✘		✘		✘	✘		✘	✘	✘	✘		✘	✘		✘
Swaziland																✘		
Tanzania & Zanzibar			✘	✘	✘		✘	✘	✘			✘						
Zambia			✘				✘		✘	✘		✘				✘		✘
Zimbabwe							✘				✘			✘	✘			

**Table 2:** Countries where bilateral and multilateral agencies and NGOs are working on sustainable tourism in southern Africa

# CONCLUSION

This report has demonstrated that there are several credible sustainability initiatives ongoing in southern Africa and by a diversity of actors from the private and public sectors and NGOs. Many are linked to community-based tourism enterprises and joint-venture (public/private) partnerships, which have delivered local benefits to communities. In spite of this, the southern African tourism industry is still falling short of expectations in meeting national and regional level goals for sustainable development and poverty alleviation.

There is a definite need for greater networking between all tourism stakeholders, that promotes a clearer understanding of and support for national and regional tourism sustainability objectives. Regional stakeholders have also identified the need for better organised information on funding opportunities available to the sector, and a focus on capacity building that directly supports national and regional priorities and transforms the industry towards greater sustainability.

# RECOMMENDATIONS FOR HIGH IMPACT INTERVENTIONS TO MAINSTREAM SUSTAINABLE TOURISM

Stakeholders' suggestions of activities to include in a 3-year project to mainstream sustainable tourism in southern Africa, together with recommendations from a World Bank study on sustainable tourism in the region, were presented and discussed during the virtual meeting, to prioritize the main project ideas that could have high impacts in advancing sustainable tourism. Participants were asked what combination of activities would be: most effective at generating impact; quickest and easiest to implement; most cost efficient; and able to offer the most meaningful and measurable impacts.

## / 7.1 Strategies and Policy Recommendations

The prevalence of strategies, policies, regulations and plans on sustainable tourism is patchy across southern Africa. More consistent implementation of sustainable practices would be encouraged through a stronger enabling environment for planning and development of sustainable tourism in destinations. Stakeholders that could contribute include regional bodies (e.g. RETOSA) and relevant national government departments.

### Specific recommendations are to:

- Develop a regional framework for sustainable tourism, which countries could then use to develop their own legislation. The framework should evolve from participatory processes and incorporate a review of existing regulatory frameworks that highlight any sustainability gaps.
- Integrate sustainable tourism goals and objectives into the operations of all national tourism offices.
- Create mechanisms for incentives and financial support for tourism developments that meet sustainability criteria.
- Ensure participatory destination planning for sustainable tourism development takes place, and action plans are developed with local stakeholder participation. Such plans should focus on yield (i.e. revenue per tourist) rather than the number of tourists in a destination.

## / 7.2 Tourism Product and Service Recommendations

There needs to be a sufficient supply of sustainable tourism products for tourists and tour operators to use in order to reach a ‘tipping point’ where sustainable practices are the norm. As yet there is no evidence that tourists are demanding sustainable tourism, so the market is not yet a motivator for the majority of operators. Incentives and technical support should be provided for sustainable tourism developments, and once operational they should have preferential market access to those that are not sustainable. Greater interest and understanding of sustainable tourism needs to be generated among tourists and tour operators in relation to their purchasing decisions.

Key stakeholders who could collaborate on projects to strengthen sustainable tourism products and services would include RETOSA, national tourism boards and tourism sector associations across the region that can work between the private sector and government, and research institutions and consultancies which can develop appropriate tools to guide sustainable business practices. Specific recommendations are to:

- Develop a regional marketing plan and/or brand, focused on southern Africa as a sustainable tourism destination.
- Mobilize the private sector to develop and operate sustainable tourism, and provide them with trust, space and time for innovation. Encourage collective and participatory planning and design of tourism involving public, private sector, and community representatives.

- Develop a mechanism for monitoring the implementation of management plans for sustainable tourism, including audits to ensure they accomplish their goals.
- Promote better sustainable tourism product market fit through careful matching of supply with demand (i.e. identify sustainable tourism operators and supplying them with sustainable tourism products; develop combined sustainable tourism packages and tours).
- Promote opportunities for local communities in tourism, including through local supply chains and linkages, as well as employment that is fairly remunerated, and through ownership and equity in joint ventures.

## / 7.3 Training and Capacity Building Recommendations

Training and capacity building activities should be targeted to persons working within government agencies, tourism boards, and protected area agencies. These professionals have a particularly important role in mainstreaming sustainable tourism, and sustainability needs to be fully integrated into their work. Many government ministries and departments have linkages to tourism: Environment, Industry and commerce, Energy, Transport, and of course Tourism. Across Africa, the majority of government departments have only a small number of staff who generally understand sustainable tourism. Understanding and expertise needs to be expanded and enhanced, if sustainability is to be integrated into national strategies, policies and regulations. For tourism boards,

this relates to marketing their destinations, and working with operators on the ground. For protected area agencies, training and capacity building relates to planning and managing tourism development and visitation, including tourism concessions, to ensure that the natural capital is not undermined.

Key stakeholders who could collaborate on projects to strengthen training and capacity building in sustainable tourism include training service providers and educators who can design and deliver training courses for current employees, by trainers who are experienced in building skills in each stakeholder group. In the long term, integrating sustainability themes into the types of tertiary and post-graduate courses that people working for these institutions undertake would be preferable to retro-training people who are already working. This would require linkages and coordination with relevant Ministries of Education and specific universities and technical colleges in the region.

### Specific recommendations are to:

- Develop capacity at universities and centres of excellence in the region for delivering sustainable tourism training, distributing knowledge, learning and training materials on sustainable tourism for different stakeholders.
- Train and build capacity of key stakeholders in sustainable tourism, with particular focus on the private and public sectors, and tourism practitioners. At the micro level, encourage professional development for community-based organisations and the private sector.



- Ensure regular dissemination of information and awareness raising on sustainable tourism, particularly in relation to: the public sector on policies and frameworks for sustainable tourism; information for international and domestic source markets; and materials on the differences between tourism that is truly sustainable and 'greenwashing'.

## / 7.4 Technical Tools and Guidance Recommendations

Research is needed to establish the business case for sustainable tourism, particularly in terms of cost-savings and improved market access. Existing tools to support sustainable tourism tend to focus on the environmental side (e.g. biodiversity conservation, energy, water and waste) but must be more balanced, addressing components of social, cultural and economic sustainability. Existing regional or national tourism certification standards should be accredited to the internationally recognized GSTC criteria, rather than developing new or regional systems and standards.

Key stakeholders who could collaborate on projects to strengthen sustainable tourism products and services would include the GSTC and current standard setting agencies in the region (e.g. certification bodies, tourism boards). Academic institutions and researchers with expertise in tourism and sustainability would also need to be engaged.

### Specific recommendations are to:

- Develop and promote consumer information tools to address social, environmental, and economic issues; and which can build public support for sustainable tourism.
- Develop and provide easy access tools and technical information to encourage uptake of sustainable tourism. Include guidelines for communities on involvement in tourism, and how to reduce environmental impacts from operations.
- Undertake research on sustainable tourism to collate information on best practice examples and case studies; evidence on the cost advantages of sustainable tourism; feasibility studies for sustainable tourism interventions; and to monitor and evaluate the impacts of sustainable tourism against baselines.
- Share information on best practices in sustainable tourism, and encourage field visits to maximize learning. Avoid duplication of unsustainable practices, and encourage scaling up of activities that work.

## / 7.5 Network Recommendations

Networking should be encouraged to build relationships and linkages among professionals and institutions on sustainable tourism. There is a strong sense that people want to collaborate regionally, and share resources and information.

### Specific recommendations are to:

- Support networking and sharing best practice on sustainable tourism through networks. Ensure different types of stakeholders participate, including the public and private sectors, communities and NGOs.
- Organise an annual conference on sustainable tourism to share knowledge and network.
- Create a network of technical advisors available to support destinations in developing sustainable tourism.
- Develop partnerships arrangements to promote sustainability, including with airlines, hotels, tour operators, travel agencies.

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# APPENDIX

## Funders, stakeholders and examples of projects in southern Africa

<sup>37</sup> Stakeholder survey

<sup>38</sup> GiZ, 2012

<sup>39</sup> Spenceley and Rozga, 2007

<sup>40</sup> Spenceley and Batey, 2011

<sup>41</sup> <http://web.worldbank.org/WBSITE/EXTERNAL/EXTABOUTUS/0,,contentMDK:20040612~menuPK:41694~page>

Source(s)	Focus	Examples
<b>Bilateral agencies</b>		
<b>Commonwealth Secretariat (ComSec)</b>	Commonwealth Tourism Centre, responsible for promoting intra-commonwealth tourism, capacity building, facilitating information exchange, promoting tourism investment and to develop strategic partnerships.	Development of environmental good practice guidelines for private sector in Mauritius
<b>Deutsche Gesellschaft für Technische Zusammenarbeit (GiZ) (formerly GTW)</b>		Ecotourism manual in Botswana Value chain analysis in the Seychelles
<b>EU (European Union)</b>	Supra-regional project on 'Tourism and sustainable development': largely in focal areas of economic development, management of natural resources and biodiversity, resource efficiency, vocational education and regional development <sup>37</sup> .	<b>South Africa:</b> work on ecotourism, livelihood interventions and value chain linkages: has included activities on public private partnerships and value chain linkages in tourism <sup>38</sup> .  Other projects in DRC and regionally, also support EcoMark Africa  Group of tourism operators ('Go To Madagascar') ran a tourism training program part-financed by European Commission under ProInvest Program: introduction to sustainable tourism concepts, how to make tourism products more responsible, and take market advantage <sup>39</sup> .
<b>Norwegian Agency for Development Cooperation (NORAD)</b>	Thematic area of 'Climate change and the environment', under which a number of tourism projects have been supported.	<b>Mozambique:</b> "High Impact Tourism Training for the Informal Sector" (HITT) - 4-year European Union project implemented by SNV & National Institute for Employment and Vocational Training. Aims to develop integrated market driven system of vocational training in tourism; expand access for disadvantaged communities to such training and facilitate direct links with tourism industry to maximize employment & income opportunities <sup>40</sup> .  Projects include tourism infrastructure & Community-based Natural Resource Management (CBNRM) initiatives in Zambia (Kafue), South Africa, Tanzania, Mozambique (Niassa & Bazaruto) and Malawi <sup>41</sup> .

<p><b>United States Agency for International Development (USAID)</b></p>	<p>“Environment and Climate Change” program has a number of conservation projects with sustainable tourism components<sup>42</sup>.</p>	<p><b>Mozambique:</b> Financed development of a series of tourism plans in the Northern Arc, supporting conservation and tourism development in Gorongosa National Park and Lake Niassa, SPEED program supported development of a tourism concessions analysis and private sector manual</p> <p><b>Madagascar:</b> WWF program funded by USAID on ecotourism and protected area management. Sent staff from Association Nationale pour la Gestion Aires Protégé (ANGAP) for training in South Africa &amp; Canada on interpretation, park management, and creating tourism circuits<sup>43</sup>.</p>
<p><b>Multilateral agencies</b></p>		
<p><b>International Finance Corporation (IFC)</b></p>	<p>Part of World Bank group (see below); provides advisory and investment services to private sector.</p>	<p><b>South Africa:</b> Private Enterprise Partnership (PEP) Africa program supported Pro-Poor Tourism Consortium to develop 4 sets of guidelines: partnerships with communities, boosting local input in tourism supply chain, stimulating local tourism products, and encouraging small &amp; medium enterprises.</p> <p><b>Tanzania:</b> helped finance construction of 3 lodges in Northern Safari Circuit (US\$9 million). Project expected to benefit Tanzania’s conservation efforts, through revenues to Park &amp; Conservation Area authorities, reducing poaching, and promoting welfare of local communities<sup>44</sup>.</p>
<p><b>United Nations Conference on Trade and Development (UNCTAD)</b></p>	<p>Tourism-Led Poverty Reduction Program (TLPRP) focuses on value-chain interventions to expand opportunities for the poor and improve market linkages.</p>	<p><b>Mozambique:</b> US\$30 million “Transfrontier Conservation Areas and Conservation Project (TFCA)” in (2005-2013). Includes Community Enterprise Fund, supported by the IFC’s “Anchor Program”, a US\$1.8 million project (2007-2011)<sup>45</sup>. Program identified, planned, packaged and designed marketing for ‘Anchor Sites’ to investors. As a result, a concession in Chemucane region of Maputo Special Reserve (part of Lubumbo TFCA) is now in development phase, as a joint venture between private sector and a local community<sup>46</sup>.</p>
<p><b>United Nations Educational, Scientific &amp; Cultural Organisation (UNESCO)</b></p>	<p>Works on World Heritage Site (WHS) designation, conservation and management of sites in danger, and World Heritage Centre addresses tourism at WHSs.</p>	<p><b>Mozambique:</b> strengthening agricultural value chains between suppliers and tourism industry in Maputo. Also developed training modules on tourism development, agricultural and cultural tourism, and craft production.</p> <p>WHSs across southern Africa, including in South Africa (8); Namibia (1); Mozambique (1); Tanzania (7); Botswana (1); Kenya (4); Malawi (2); Madagascar (3); DRC (5); Zambia (1); Seychelles (2); and Zimbabwe (5).</p>
<p><b>United Nations Environment Program (UNEP)</b></p>	<p>Production Branch works to promote sustainable resource management in a life cycle perspective for goods and services produced and used by governments, business and civil society<sup>47</sup>.</p>	<p><b>Mozambique:</b> capacity building for tourism operators and national consultants.</p> <p><b>South Africa:</b> worked in partnership with GEF &amp; South African Department of Environmental Affairs (DEA) to develop sustainable tourism project to green the 2010 World Cup including renewable energy interventions, awareness-raising and a carbon offsetting programme.</p> <p>Also supported the Great Apes Survival Partnership (GRASP), (DRC &amp; other countries), and the COAST project (operating in the Seychelles, Mozambique, and Tanzania)</p>

<sup>42</sup> [www.usaid.gov](http://www.usaid.gov)  
<sup>43</sup> Spenceley and Rozga, 2007  
<sup>44</sup> Spenceley and Rozga, 2007  
<sup>45</sup> Spenceley and Fabricius, 2012  
<sup>46</sup> Spenceley and Batey, 2011, Spenceley and Fabricius, 2012  
<sup>47</sup> <http://www.unep.fr/scp/>



<p><b>United Nations World Tourism Organisation (UNWTO)</b></p>	<p>The UNWTO “Sustainable Tourism – Eliminating Poverty Initiative” (ST-EP) program has a variety of projects that aim to reduce poverty levels through developing and promoting sustainable forms of tourism products, and building capacity in destinations<sup>48</sup>. They have a number of projects in southern Africa (including Madagascar (5 projects); Mozambique (1 project); South Africa (1 project); Southern Africa (1 project); Tanzania (3 projects); Zambia (1 project), and SADC (1 project)); for implementation in these countries they partner with the IUCN and SNV and the ST-EP Foundation.</p>	<p><b>Madagascar:</b> development of Community-based Ecotourism in the Anjozorobe-Angavo Protected Area  <b>Mozambique:</b> Community-based Lodges Training Programme  <b>Mozambique:</b> 2-year “Human Resource and SME Development for the Tourism Sector in Inhambane Province” project. Main objective to enhance local economic impact from tourism through human resource development and SME development in the tourism sector<sup>49</sup>  <b>South Africa:</b> Pro-Poor Tourism Leadership and Empowerment Training to Pondoland Community Trust  <b>Southern Africa:</b> Marketing Support for Community-based Tourism (RETOSA Network)  <b>Tanzania:</b> Cultural Tourism Enhancement and Diversification Programme  <b>Tanzania:</b> Pangani-Saadani Coastal Protection  <b>Tanzania:</b> Uluguru Mountains Ecotourism Project  <b>Zambia:</b> Village Action for Sustainable Tourism</p>
<p><b>UNIDO</b></p>	<p>The “Collaborative Actions for Sustainable Tourism” (COAST) project: US\$ 29 m Global Environment Facility (GEF) funded initiative spearheaded by UNIDO and the UNWTO. Aims to demonstrate best practices &amp; strategies for sustainable tourism development to reduce degradation of marine &amp; coastal environments of trans-boundary significance.</p>	<p>Participating countries in southern Africa include Mozambique, Seychelles and Tanzania. Project includes sustainable tourism initiatives to (1) develop eco-tourism initiatives to alleviate poverty through sustainable alternative livelihoods, and generate revenues for conservation of biodiversity and for the benefit of local communities; (2) implement and evaluate eco-certification and environmental management systems for use by private sector and community lead investments; and (3) improve reef recreation, management and monitoring mechanisms.</p>
<p><b>UNDP</b></p>	<p>Government of Seychelles – United Nations Development Program – Global Environment Facility (GOS-UNDP-GEF) “Mainstreaming Biodiversity Project” provides grants to projects with a primary focus on protection of the environment and biodiversity.</p>	<p>In relation to tourism, initiative has supported<sup>50</sup>:          development of improved guidance for biodiversity conservation in project implementation for tourism developers;          development, adoption &amp; promotion of Seychelles Sustainable Tourism Label (SSTL) &amp; Environmental Management Systems for tourism operators<sup>51</sup>;          support to Joint Management Systems for management of ecologically sensitive areas with private sector operators;          development of guidelines and criteria for joint management of ecologically sensitive sites.</p>
<p><b>World Bank</b></p>	<p>“African Finance and Private Sector Development” program addresses tourism in relation to investment climate, competitiveness, PPPs and financial sector development<sup>52</sup>, and also works under themes of “Sustainable development” and “Environment”. Funded a number of projects in southern Africa that have dealt with tourism, in addition to conservation and development.</p>	<p><b>Botswana:</b> project on wildlife tourism  <b>Madagascar:</b> on conservation and ecotourism in national parks and on poverty reduction  <b>Mozambique:</b> on TFCA and private sector development in tourism  <b>Namibia:</b> on conservancies  <b>South Africa:</b> supporting Greater Addo National Park, Richtersveld, Greater St Lucia Wetland Park &amp; CAPE project  <b>Zambia:</b> economic expansion and diversification (SEED). The value of projects identified during this study that incorporate tourism elements amounts to US\$365 million.</p>

<sup>48</sup> Anon, undated  
<sup>49</sup> Spenceley et al, 2011  
<sup>50</sup> MGOS/GEF/UNDP (undated)  
<sup>51</sup> see <http://www.seychelles.travel/sstl>  
<sup>52</sup> <http://web.worldbank.org/WBSITE/EXTERNAL/COUNTRIES/AFRICAEXT/EXTAFRSUMAFTPS/0,-contentMDK:20793743~menuPK:2145169~pagePK:51246584~piPK:51241019~theSitePK:2049987,00.html>

<p><b>International Labour Organisation</b></p>		<p><b>In South Africa:</b> “Sustaining Competitive and Responsible Enterprises (SCORE)” programme: aims to improve productivity and competitiveness of SMMEs through developing workplace cooperation between management and labour. Developed series of training courses and case studies in tourism, tested in Amakhala and Madikwe Game Reserves. One course on “Responsible Wildlife Tourism: Business sustainability, environmental responsibility and community engagement.”<sup>53</sup></p>
<p><b>Millennium Corporation</b></p>		<p>“Conservancy Development Support Services Programme” in Namibia funded by Millennium Challenge Corporation that aims to improve sustainability of 31 community conservancies (areas of land where people acquire rights and responsibilities for consumptive and non-consumptive use and management of wildlife and natural resources, on behalf of the community)<sup>54</sup>, particularly through development of tourism joint-ventures<sup>55</sup>.</p>
<p><b>NGOs</b></p>		
<p><b>African Safari Lodges Program (ASL)</b></p>	<p>Manages an innovative programme designed to galvanize transformation in deep rural areas of Southern Africa. Lasting partnerships created between safari lodge operations and people of surrounding communities are generating wealth and well-being. Aim to set up a capable regional institution that provides technical skills, knowledge, capacity and advocacy for increasing ability of partnerships between safari lodges, protected area managers, and rural residents. Aim to optimize benefit flows to rural households; ensure healthy commercial returns for lodge operators; and operate within ecological limits as prescribed by public, private or community-owned reserve managers<sup>56</sup>.</p>	<p>Operate in South Africa, Namibia, Botswana, Mozambique, and in partnership with other agencies including the Ford Foundation, the IFC and Technoserve.</p>
<p><b>African Wildlife Foundation (AWF)</b></p>	<p>Works in destinations to involve, educate &amp; equip local people to practice sustainable land management, and to generate economic benefits from them. Mission-related investment company, <i>African Wildlife Capital</i> (AWC): offers alternative development financing as structured loans to selected small &amp; medium-sized conservation enterprises in agricultural &amp; tourism sectors.</p>	<p>Work across Africa in the following destinations: Congo (DRC); Kazungula (Botswana, Namibia, Zambia, Zimbabwe); Kilimanjaro (Kenya and Tanzania); Limpopo (Mozambique, South Africa and Zimbabwe); Maasai Steppe (Tanzania); Regional Parc W (Benin, Burkina Faso, Niger); Samburu (Kenya); Virunga (DRC, Rwanda and Uganda); Zambezi (Mozambique, Zambia and Zimbabwe).</p>
<p><b>Conservation International (CI)</b></p>	<p>Works in biodiversity hotspots globally</p>	<p><b>South Africa:</b> worked with Richtersveld community’s World Heritage Site</p> <p>Helped to finance tourism lodges in both Mozambique and Madagascar</p>

<sup>53</sup> Spenceley et al, 2011  
<sup>54</sup> Ashley and Jones, 2001  
<sup>55</sup> Stakeholder survey  
<sup>56</sup> Stakeholder survey

<p><b>International Union for the Conservation of Nature (IUCN)</b></p>	<p>Global NGO, with office for east and southern Africa based in Nairobi. World Commission on Protected Areas - Tourism Specialist (WCPA-TAPAS) Group has an international network of 160 volunteers.</p>	<p>Recent initiatives in Africa by TAPAS group include a regional conference on tourism concessions.</p>
<p><b>Peace Parks Foundation (PPF)</b></p>	<p>Helps to organise communities, support development of tourism enterprises and tourism plans.</p>	<p>Working in 10 TFCAs in southern Africa: Ai Ais Richtersveld, Kgalagadi, Greater Mapungubwe, Maloti Drakensberg, Great Limpopo, Lubombo, Malawi/Zambia, KAZA, Lower Zambezi, Liuwa Plains.</p>
<p><b>SNV</b></p>	<p>Until recently, SNV had 85 tourism advisors in West, Central, East and Southern Africa; Asia; Latin America; and the Balkans. Main focus was on pro-poor tourism, destination management and value chain development, with interventions to build capacity of local tourism stakeholders. SNV has been a main partner of UNWTO in implementing ST-EP projects.</p>	<p>Tourism now phased out as a strategic theme, but some countries such as previously supported by SNV (e.g. Tanzania and Mozambique) continue to work in this field.</p>
<p><b>Sustainable Tourism Network Southern Africa (STNSA)</b></p>		<p>Aims to establish an integrated, regional approach to sustainable tourism development in SADC and provide channel for all SADC countries to exchange experiences and best practices regarding sustainable tourism policy and practice throughout the region<sup>57</sup></p>
<p><b>World Wide Fund for Nature (WWF)</b></p>	<p>Programs focus on conservation and development, and have collaborated with agencies across east and southern Africa on tourism-related initiatives.</p>	<p>Community-based natural resource management (CBNRM) programs across the region include:</p> <ul style="list-style-type: none"> <li><b>Namibia</b> (LIFE program, and human-wildlife conflict activities)</li> <li><b>South Africa</b> (Black Rhino range expansion program, turtle conservation, Biodiversity and Wine Initiative)</li> <li><b>Zambia</b> (Kafue)</li> <li><b>Uganda</b> (Rwenzoris)</li> <li><b>Mozambique</b> (Quirimbas)</li> </ul>

<sup>57</sup> <http://www.sustainabletourismalliance.co.za/about-stnsa/>