

Tourism Development Plan

ǀKhomani San Community

Commissioned by:

**ǀKhomani San Boesmanraad
(Park & Traditional Ward Committees)**

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ACRONYMS

ASLF	African Safari Lodge Foundation
BOT	Build, operate and transfer concession
CPA	Common Property Association
CPPP	Community, public, private partnership
EIA	Environmental Impact Assessment
EMP	Environmental Management Plan
FIT	Fully Independent Traveller
JMB	Joint Management Board
KTP	Kgalagadi Transfrontier Park
MET	Ministry of Environment & Tourism
MOT	Maintain, operate and transfer concession
NGO	Non-governmental Organisation
ROT	Rehabilitate, operate and transfer concession
SADC	Southern Africa Development Community
SANParks	South African National Parks
SASI	South African San Institute
TA	Traditional Authority
TCA	Traditional conservation area
TDF	Tourism Development Framework
TOR	Terms of Reference
TPD	Transfrontier Park Destinations
WLS	Wilderness Leadership School

Executive summary

This plan proposes a variety of tourism development and activity proposals for the !Khomani San land inside the Kgalagadi Transfrontier Park (KTP) as well as their farm land. These proposals are grounded in market information gathered from SANParks and private lodge operators in the planning domain. The table below summarises the recommendations for tourism development and activities in the KTP:

!Xaus Lodge Concession (existing)	Southern Auob Concession (new)	!Khomani San 4x4 Route & Bush Camp Concession (new)	Cultural Activities from Resorts & Camps (new)	Wilderness Leadership Trails (existing)	Heritage Centre (new)
<ul style="list-style-type: none"> Option 1: Expand to a maximum of 24 rooms (48 beds) Option 2: Only address current short-comings in existing lodge (guide rooms, water supply, electricity supply) Develop a 4x4 eco-trail & unserviced bush camp High priority 	<ul style="list-style-type: none"> Light footprint, upmarket lodge of 24 to 48 beds Developed via a build operate transfer concession with a private partner Very high priority 	<ul style="list-style-type: none"> 4x4 eco-trail between Twee Rivieren & Mata Mata At least 2 primitive bush camps Developed & operated in partnership with an existing operator Low priority 	<ul style="list-style-type: none"> Guided interpretive walks & other activities at resorts & camps in KTP Developed & operated in partnership between !Khomani San, SANParks & private concessionaires Preceded by guide training & entrepreneurial development Medium priority 	<ul style="list-style-type: none"> Formalisation of existing trails conducted by Wilderness Leadership School into a concession contract High priority 	<ul style="list-style-type: none"> New heritage centre at Twee Rivieren to show case heritage of the area To be linked with World Heritage listing of area Very high priority

The table below summarises the recommendations for tourism development and activities on the !Khomani San farm land:

Erin Hunting & Tourism Concession (new)	TCA Bush Camp & Cultural Activities (new)	Witdraai Bush Camp & Cultural Activities (existing)	Miershooppan hunting concession (new)	Scotty's Fort Lodge Concession (new)
<ul style="list-style-type: none"> High value hunting & tourism concession Developed & operated with a private sector partner Specialising in traditional San hunting methods, including bow hunting Very high priority 	<ul style="list-style-type: none"> Rustic bush camp & associated cultural activities Developed & operated by the local community living in the TCA, BUT under guidance & support of an established tour operator experienced in cultural tourism Medium priority 	<ul style="list-style-type: none"> Upgrade & possible relocation of existing operation Developed & operated by the local community living at Witdraai, BUT under guidance & support of an established tour operator experienced in cultural tourism Low priority 	<ul style="list-style-type: none"> Biltong hunting concession Developed & operated with a private sector partner High priority 	<ul style="list-style-type: none"> In short-term, existing farm house used as guest house In long-term, Roadside Lodge Concession of approximately 60 to 80 beds & campsite Developed via a build operate transfer concession with a private partner Low priority

In addition to the above, this plan outlines several important regional interventions that could increase visitor flow through the area, improve the experience of visitors, and diversify current tourism markets. These regional interventions include: support to the World Heritage listing process that is currently underway; development of regional gateways to improve the sense of arrival into the Kalahari and provide tourism support services; development of regional tourism routes and promotion of tourism attractions in the broader area; Park development, particularly the re-branding of the KTP as a heritage and wildlife destination; support to the production and sale of craft from this region; implementation of guide training with improved linkages to the private sector in terms of in-service training and graduate employment; and other community training, particularly in literacy and English language to assist more local people to enter the tourism industry.

1. Introduction

This report is the product of a tourism planning exercise commissioned by the !Khomani San Community and facilitated by the African Safari Lodge Foundation (ASLF). Its purpose is to provide a first, high-level planning and implementation framework for the development of tourism on !Khomani San land inside and in close proximity to the Kgalagadi Transfrontier Park (KTP).

1.1 Objective

This plan aims to identify viable tourism development opportunities on the !Khomani San land inside and near to the KTP with a view to creating employment, generating income for the community, and building recognition of the area's significance as home to one of southern Africa's first peoples. In achieving this, the report builds on the planning already completed by South African National Parks (SANParks) and other stakeholders, and draws on recommendations and commitments already made in these documents.

1.2 Method

The study involved a multi-disciplinary team consisting of tourism planners (Peter John Massyn and Ed Humphrey), with environmental inputs from ecologists (David Grossman and Phillipa Holden) and mapping services by a GIS expert (Katharina Dierkes). The planning procedure included the following activities:

- Inception meetings with the study team to clarify the methods to be used and products required;
- Review of background documents, including management and business plans, maps, tourism plans and other relevant literature;
- Field visit to the planning domain between 26th July and 1st August 2009, which involved exploring the !Khomani San areas with tourism potential inside the KTP and on nearby farm land as well as discussions with representatives of the !Khomani San;
- Visits to existing tourism operations in the area, as well as on nearby land;
- Review of tourism statistics, park entry statistics, and market research conducted by the North West University, SANParks and the Department of Wildlife and National Parks in Botswana;
- Telephone and face-to-face interviews of people with knowledge of the area and its potential for tourism and trophy hunting, including members of the !Khomani San community, as well as tour and safari operators, trophy hunters, lodge operators, relevant government departments and NGOs;
- Follow up meetings with various stakeholders to verify findings from the field work;
- Preparation of the draft report, including accompanying maps;
- Presentation of findings and the draft report to !Khomani San Boesmanraad on 20th January 2010 and the Joint Management Board (JMB) for the !Ae!Hai Kalahari Heritage Park on 21st January 2010;
- Meeting between the planning team and the !Khomani San Boesmanraad on 24th and 25th February 2010 to agree on priorities and plan next steps; and
- Incorporation of relevant comments from stakeholders into this final report.

1.3 Structure

The report includes:

- A broad description of the study area including a review of regional issues, access and transport infrastructure, environmental issues, tourism attractions, existing products and markets, visitor gateways and routes through the area, and major tourism trends;
- An introduction to each land unit within the planning domain, including the social and historical context, environmental issues, tourism resources, existing markets and products;
- Specific tourism proposals for each land unit, including new developments and activities, recommendations on improving existing products, suggested zoning, required support infrastructure, visitor management requirements, and branding or marketing needs; and
- Sufficient detail for proposed interventions, developments and activities to allow opportunities to be packaged for implementation.

To conclude, the report provides a summary of suggested regional interventions, possible financial and economic impacts, recommended priorities for implementation, and a proposed implementation strategy.

Annexed to this document is a list of references and people consulted, copies of market survey forms used, environmental/development guidelines for tourism and a template environmental management plan (EMP).

2. The Regional Context

2.1 Planning domain

The planning domain comprises several parcels of land situated inside and near the KTP in the Northern Cape Province of South Africa (refer to **Map 1**):

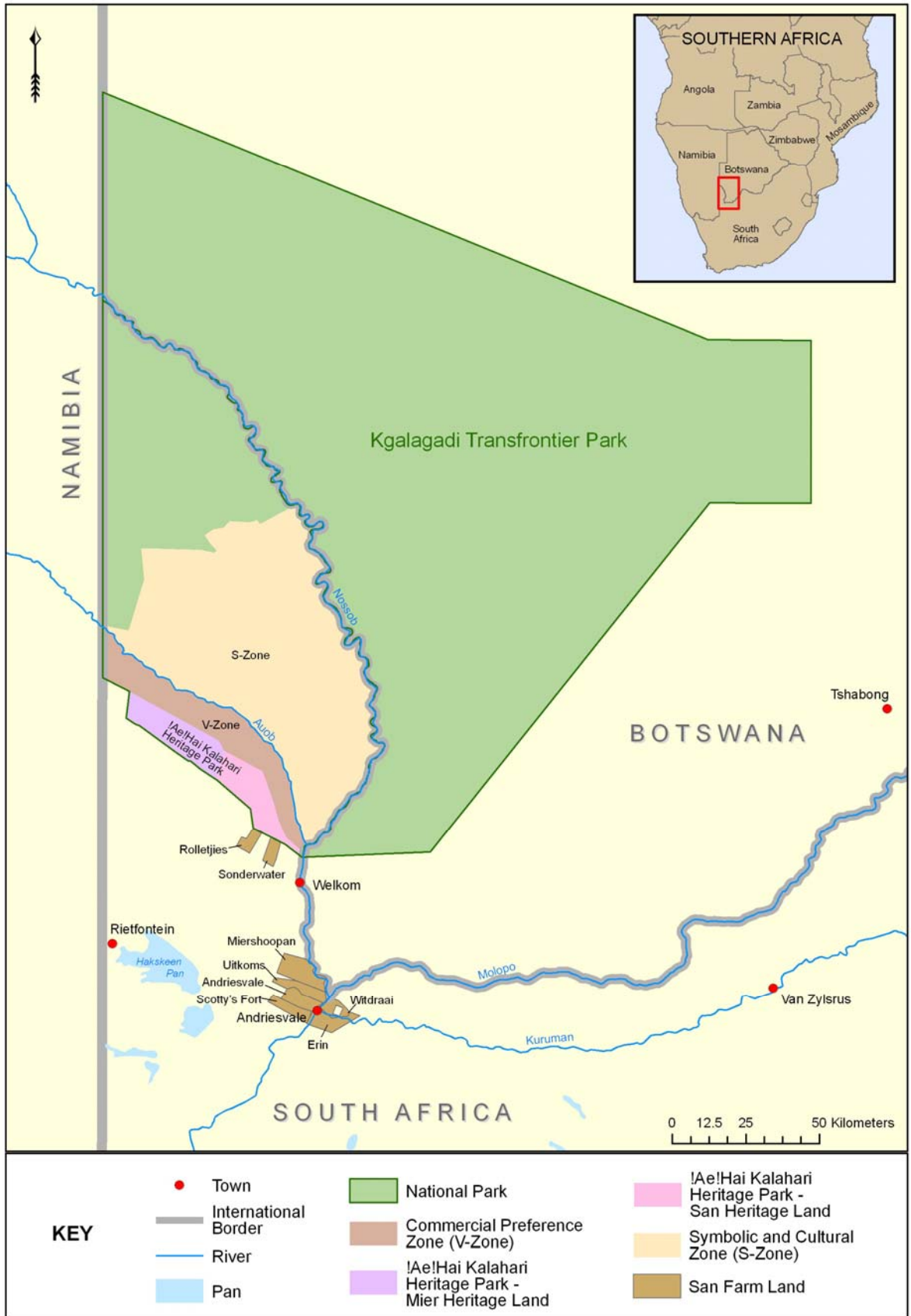
- 80,000ha of prime game viewing land along and south of the Auob River inside the KTP, on which the community have preferential commercial rights (referred to as the Commercial Preference Zone, or V-Zone);
- 473,830ha of land between the Auob and Nossob Rivers inside of the KTP, which is assigned for symbolic and cultural use (referred to as the Symbolic and Cultural Zone, or S-Zone);
- 27,769ha of San Heritage Land inside of the KTP, which together with heritage land of the Mier community (a further 30,134ha) is co-managed with SANParks as a contractual national park called the !Ae!Hai Kalahari Heritage Park; and
- 40,748ha of Kalahari farm land situated adjacent to the KTP and further south, which is made up of eight individual properties being Sonderwater, Rolletjies, Erin, Witdraai, Uitkoms, Andriesvale, Miershoopan and Scotty's Fort.

2.2 Historical & social context

Most paleoanthropologists and geneticists subscribe to the "Out of Africa" theory that the ancestors of modern humans arose some 200,000 years ago in Africa, with the earliest modern human fossils being found at Omo Kibish, Ethiopia (Shreeve, 2006). They also agree that 'all the variously shaped and shaded people of Earth trace their ancestry to African hunter-gatherers'. Ancestral DNA markers turn up most often among the San people of Southern Africa and the Biaka Pygmies of central Africa, as well as in some East African peoples (Shreeve, 2006). From this we can reasonably conclude that the San form part of our ancestry, as well as being the first people of southern Africa, as is evidenced by a vast rock art record that is to be found on the sub-continent.

The San were pushed into remoter and drier regions by two major relatively recent migrations of other peoples. Approximately 2,000 years ago the sheep and cattle herding Khoekhoe peoples migrated down from Namibia and Botswana, pushing San people away from the coast and river areas, and around 800 years ago a major migration of Bantu-speaking peoples entered eastern South Africa (Huffman, 2006). It would seem that early relations between hunter-gatherers and the agro-pastoralist peoples were often positive and involved a degree of intermarriage with the retention of the independence of San languages and culture.

Map 1: Location of the study area.



This changed with the arrival of European explorers and settlers in the 16th and 17th centuries, where after land was gradually carved up into freehold farms, displacing the indigenous people onto smaller tracts of communal land, particularly so in Namibia, South Africa and Zimbabwe. The expansion of European colonisation caused a great strain on land resources. San hunter-gatherers were victimised by the European settlers as well as by Khoe and Bantu-language groups, who were all competing for resources in the face of European territorial expansion. Over this period, disease and other genocidal conditions decimated most San clans in South Africa (and Namibia), with the last permit to hunt a Bushman being issued by the pre-apartheid state in 1927 (Gall, 2001).

At the same time, growing commercial trade, together with protection of crops and livestock necessitated certain controls over wildlife. The accumulation of wealth led to divisions among social classes, and 'desirable' wildlife species came to be controlled by an elite who alone could hunt, trade and enjoy the spoils of certain species (Carruthers, 1995). Wildlife numbers on freehold ranches decreased over time, particularly in South Africa, due to a combination of uncontrolled hunting, slaughter for skins, trophies and biltong (Grossman and Holden, 2005). The dominant settler religion, Christianity, excluded pantheistic beliefs in the intrinsic power and value of nature such as those held, for example, by the hunter-gathering communities (Carruthers, 1995). Rather, this religion encouraged its adherents to tame and civilize nature in the service of mankind and material progress (Carruthers, 1995).

The net result of the situation described above and exacerbated by the rinderpest epidemic of the late nineteenth century is that by the early twentieth century, in South Africa in particular, wildlife numbers had declined substantially and other natural resources were under increasing pressure (Grossman & Holden, 2005). During that time, the emergence of a 'new' conservation ethic in western countries filtered through to southern African colonial administrations. The extinct quagga and Cape bluebuck were held as examples of the result of an uncontrolled free for all approach. Species such as the bontebok, black and white rhino became flagships for conservation as their numbers had dwindled to near-extinction levels. Game reserves were proclaimed by the state, conservation legislation controlling hunting was enacted, and several private nature reserves were proclaimed by conservation conscious land owners.

Whilst indigenous hunter-gathering communities are likely to have had only minor impacts on natural systems, the enforced apartheid policy of South Africa (also applicable to Namibia, then a mandated territory under South African administration) and the prevailing land policies in then Rhodesia (now Zimbabwe), further removed any control or use of wildlife from indigenous populations. The net result of protectionist legislation was to centralize control over wildlife and to effectively ban subsistence use. Customary and traditional natural resource management institutions were eroded and gradually replaced with centralised, state systems that effectively removed control of natural resources and biodiversity from local communities, destabilising functional management systems and replacing them with increasingly non-functional, alien ones. 'Superstitious beliefs' that had previously safeguarded biodiversity to some extent were also undermined by the church with detrimental impacts on local, *de facto* conservation practices.

When the Kalahari Gemsbok National Park (959,100ha) was proclaimed in 1931, the livelihoods and freedom of movement of some of South Africa's last remaining first peoples – Bushman as they call themselves – were curtailed. Some people were settled at the park headquarters at Twee Rivieren, and some gained employment in SANParks. Many others, having been dispossessed of their land, dispersed into Namibia, onto nearby farms and further afield.

The Mier people also inhabited the area that now constitutes part of the Park, and they too have a history of dispossession. Like the San, the Mier were also allowed to continue living in certain areas within the Park, but lost their rights to hunt and manage stock on the land and were eventually forcibly removed to state land reserved for them under the settlement schemes of the 1930s.

The proclamation of the Park was followed by gazetting of Botswana's Gemsbok National Park (2,840,000ha) in 1938. The two parks were amalgamated as the Kgalagadi Transfrontier Park (KTP) in 1999 following the signing of a bilateral agreement between the South African and Botswanan governments.

In 1995 the !Khomani San community lodged a claim for the restitution of 400,000ha of land in the Kalahari Gemsbok Park. In December 1998, the Mier community, represented by the Mier Transitional Local Council, lodged its own land claim for land both inside and outside the Park. After many years of negotiation and verification, the claims were finally settled on 21st March 1999, with the official transfer of title to six Kalahari farms (approximately 34,728ha) to the !Khomani San Common Property Association (CPA), a form of collective trust allowed by the Communal Property Associations Act (No. 28 of 1996) for use by communities that have benefited from land restitution under the Restitution of Land Rights Act (No. 22 of 1994). Supplemental to this, in 2007 it was agreed that a further two farms (Sonderwater and Rolletjies - approximately 6,020ha) be transferred to the !Khomani San CPA; however up to now the allocation of title has not yet been completed (Chennells, *pers. comm.*, 2010).

In addition, after further negotiations, on 29th May 2002 the conditional allocation of some 57,903ha of land within the Park – to be managed as a Contractual National Park (!Ae!Hai Kalahari Heritage Park) – was committed to the ownership of the !Khomani San and Mier communities through what is known as the !Ae!Hai Kalahari Heritage Park Agreement (Chennells, *pers. comm.*, 2010). In this Agreement the !Khomani San community were also granted preferential tourism rights over 80,000ha south of the Auob River inside the Park, and 473,830ha of land between the Auob and Nossob Rivers as a symbolic and cultural zone.

In the years after the land claim was settled, little development occurred on this land, with growing social decay and disintegration, lack of post-restitution support from the South African authorities, divisions within the now disparate community, and no significant improvement in the welfare of most community members being the order of the day. Until recently, most elders from the community had yet to set foot on their land in the Park, let alone enjoy the rights conferred upon them.

There are many factors that contribute to and exacerbate the situation within the !Khomani San Community and these include (but are not limited to):

- After nearly a century of being spread out in the diaspora, families and clans had developed in totally different directions. Some had retained most of the old ways, others had totally immersed themselves in modern life, or had eked out lives as an underclass in dismal squatter environments. Many had survived lives of unspeakable hardship and misery. The land claim brought these disparate San, linked by ancient blood ties, into one reconstituted community, overnight. The tensions and differences arising from countless perceptions, mistrust, lack of knowledge of each other in the community, were underestimated, and need to be addressed in order to further build up the community.
- Racial discrimination remains rife in this area and this perpetuates the status quo and the sense of disempowerment that the San community experience.

- Substance abuse is wide-spread in the community and this leads to further social decay resulting in domestic violence, child abuse, and increased risk of HIV transmission, malnutrition, depression and social dysfunction.
- A lack of education and life skills means that the people are poorly equipped to cope with the situation that they find themselves in.
- The provision of services to this relatively remote area is slow and the community has been severely neglected by all arms of government. There is extremely limited access to health care, limited access to the justice system, limited access to shops and a food supply, no water on the farms, housing remains inadequate, a lack of income generating opportunities, and a lack of infrastructure including that for communication results in the physical and virtual isolation of this community with little access to information and the outside world.
- Inadequate post settlement support, despite statutory obligations and contractual commitments. This is mainly due to the over-commitment of government departments and officials in the face of numerous time and resource-consuming land claims.

Over the years, three successive CPA committees were elected in terms of the !Khomani CPA constitution, and failed largely as a result of the lack of post-restitution support referred to above. A number of Non-Government Organisations (NGOs) have attempted to assist, and the South African San Institute (SASI) has supported the community since the inception of the land claim. The CPA is currently not formally operational, pending an initiative to revive it in a sustainable manner, and currently developments in the community are coordinated by means of monthly meetings attended by all constituencies and role players. During this revival period, the Park and Traditional Ward Committees are formally mandated by the Department of Rural Development and Land Reform as the institutions responsible for development and conservation activities in the Park and on the farmland.

In recent times, through the involvement of various stakeholders including the ASLF and SASI, this situation is slowly being rectified. In 2007 and then again in 2009, grants were received from the Ford Foundation to fund a project supporting the !Khomani San community. The grants, which are being administered through the ASLF, are helping to re-build the community's cultural identity by re-establishing the people's connection with their ancestral land, facilitating the transmission of indigenous knowledge between generations, and helping the community to effectively plan, manage and benefit from their land. The Finnish Embassy has also recently contributed funds to the development of tourism opportunities for the !Khomani San on their land.

Through formation of the "Boesmanraad" (Park & Traditional Ward Committees), the community is now co-managing their land in the Park (together with SANParks) as well as their farmland. The community now seeks to develop commercial ecotourism on their land, and have requested this plan be prepared as a guide.

2.3 Access & support infrastructure

Despite the focal area's remoteness, it remains relatively accessible for tourists travelling by road or aircraft. Air access is possible via Upington and Twee Rivieren (refer to **Table 1** and **Map 2**). A recently upgraded, major regional airport is available at Upington, situated approximately 200km to the south east. Upington receives scheduled flights from Johannesburg and Cape Town. According to the Airports Company of South Africa (website accessed 3rd September 2009), Upington received approximately 19,961 arrivals and 3,694 air traffic movements in 2007; however it has the capacity to cater for around 40,000 arrivals in future. Twee Rivieren has a

high-quality, surfaced airstrip, and is available for access by chartered aircraft. No other air access is possible inside the KTP or on the directly adjacent land.

Table 1: Location of air strips near to the planning domain.

Place	Location	Condition
Upington	200km south of planning domain	Excellent, tarred, regional air hub for Northern Cape Province
Twee Rivieren	Just north of the Twee Rivieren resort and park station	Excellent, tarred

Road access into the planning domain is possible via a number of high quality, tar and gravel-surfaced roads as listed in **Table 2** and **Map 2**. Other minor access roads and internal tracks exist within the area. Proclaimed minor roads are mostly gravel-surfaced, whereas other internal tracks are sandy and require 4x4 vehicles for year-round access.

Table 2: Main access roads into the planning domain.

From	Description	Condition
South Africa	– From Upington or Rietfontein via the tarred R360	– Excellent, tarred
Namibia	– From Rietfontein border post via Keetmanshoop / Koës / Aroab along the C11 & C16	– Good, well maintained gravel roads
	– From Mata Mata Border post via Gochas along the C15	– Good, well maintained gravel road
Botswana	– From Mabuasehube via Tshabong, McCarthy’s Rest border post & C380	– Gravel, variable quality
	– From Kaa via Trans-Kalahari Highway (Kang and Logkwabe)	– Gravel, variable quality

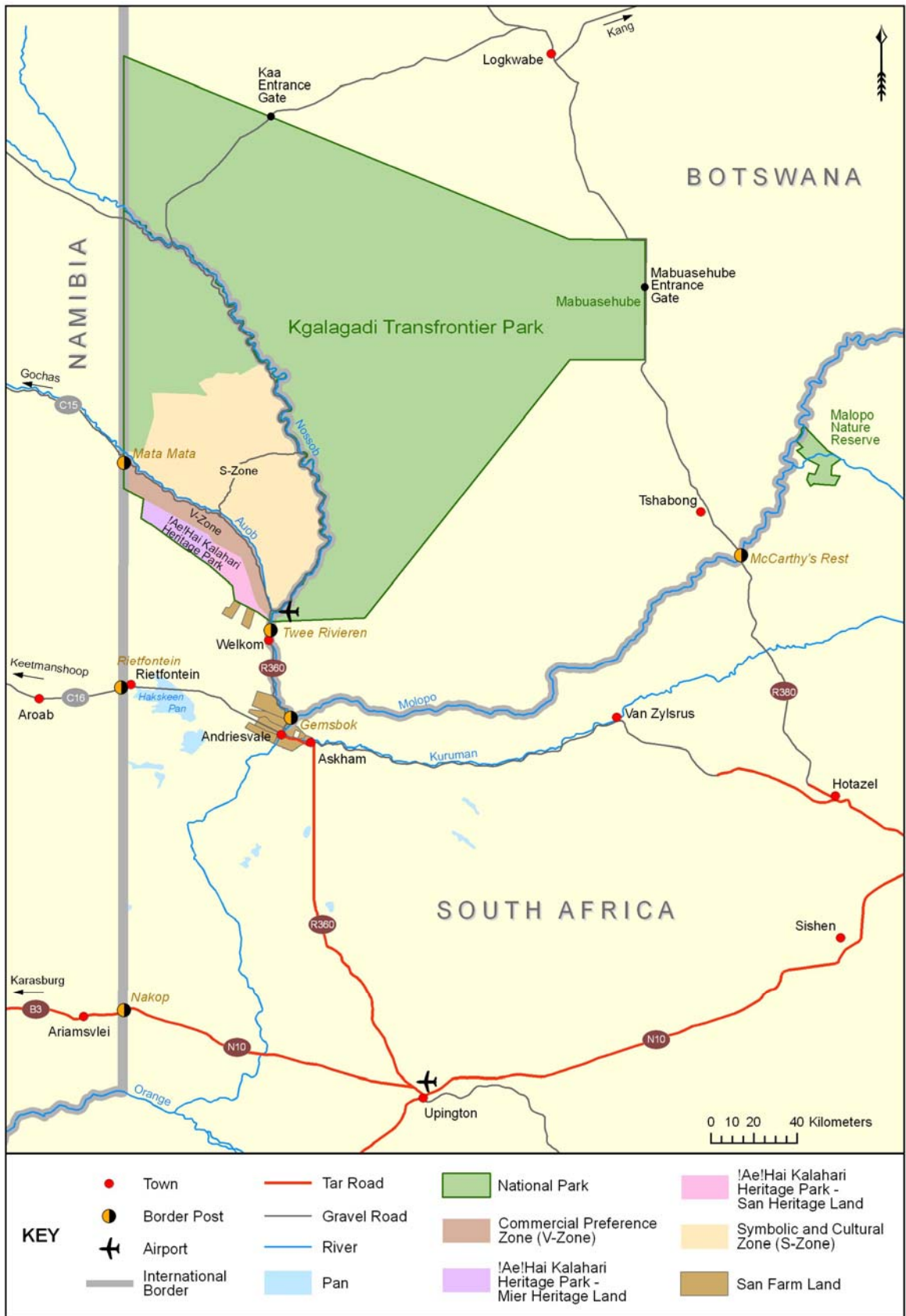
The border posts in this area are essential infrastructure to enable the flow of tourists through the planning domain. The relevant border posts are listed in **Table 3** and illustrated in **Map 2**.

Table 3: Border posts in and adjacent to the planning domain.

Name	Between
Rietfontein	South Africa & Namibia
Mata Mata	South Africa & Namibia
Twee Rivieren	South Africa & Botswana
McCarthy’s Rest	South Africa & Botswana
Gemsbok	South Africa & Botswana

According to Erasmus (*pers comm.*, 2009), on average over 1,000 park visitors use the Mata Mata border facility between Namibia and South Africa during the five peak tourism months between May and September (i.e. including exits and entries). Between February and August 2009 a total of 5,353 park visitors used the Mata Mata gate, representing approximately 20% of park visitors in the South African component (Erasmus, *pers comm.*, 2009). Interestingly, according to /Goagoseb (*pers comm.*, 2009) the Namibian immigrations officials at Mata Mata processed a total of 931 arrivals and 8,171 departures during the 2008 calendar year.

Map 2: Access roads, airports / strips and border posts in the planning domain.



2.4 Environmental context

In this section, a summary of the salient ecological and environmental constraints within the study area is provided. Where relevant, site-specific considerations are also provided for each area in the sections that follow.

This does **NOT** replace the mandatory environmental impact assess (EIA) process required for developments in the Park or in instances where EIAs are called for outside of protected areas, but is intended to provide guidelines to the various stakeholders involved in the management and development of each site.

The arid nature of the Kalahari environment and scarcity of potable groundwater places obvious constraints on development, necessitating prior professional assessment of the presence or absence of a sustainable water supply. Electricity is confined to the Andriesvale-Twee Rivieren line. Further constraints include:

- variability of rainfall - there is a high co-efficient of variability in the amount and timing of rainfall, with several years of below average rainfall to be expected, as well as years with more than double annual average rainfall and risk of flash floods;
- high intensity rainfall events leading to increased risks of accelerated soil erosion, particularly where impacts of roads, tracks and construction are not avoided or properly mitigated;
- likely future effects of climate change;
- risk of uncontrollable wildfires after good rainfall and grass production; and
- extremes in temperature fluctuation, from below zero in winter to above 45 degrees in summer.

2.5 Attractions, products, markets, flows and trends

Attractions

The attraction of this semi-arid area is based on an array of natural and cultural attributes, which collectively contribute to the visitor experience. The attractions include:

- the undulating dune system, varying in colour from pale to red, comprising a parallel series of north-west/south-east running aeolian (wind deposited) sandy dunes, inter-dune "streets", pans, some of which are exposed remnants of ancient water-courses; and the dry river beds with calcrete banks, many of which contain caves once inhabited by early people;
- big skies and spectacular star gazing;
- groves and scattered individual large camelthorn trees, many with the huge nests of gregarious sociable weavers;
- a variety of magico-medicinal plants used by the bushmen, including the hoodia and devils claws, the important tamma melons and other cucurbits, important to people and wildlife;
- varied birdlife, and reptiles including the omnipresent and iconic barking gecko;
- the large mammals including lion, and dry western species such as oryx and springbok, with unique behavioural and physiological adaptations to living in this semi-arid area. Wildlife is mainly concentrated

along two linear routes, being the Nossob and Auob Rivers. Viewing of predator kills (especially lion and cheetah) is reported to be common and spectacular;

- the smaller mammals including cape fox, bat-eared fox, ground squirrels, meerkats and a variety of rodents;
- a “wilderness” appeal characterised by the area’s sense of open space, remoteness and isolation, coupled with limited man-made alternations;
- the opportunity for “wilderness” experiences, especially along 4x4 routes away from the main access roads and tracks;
- hunting opportunities on private farmland. “Biltong hunting” is particularly common in the surrounding areas and is very popular with the South African market. But there is also a thriving trophy hunting industry, which mainly caters to overseas clients;
- interesting local history; and
- the cultural dimension of the world's first people.

Existing tourism products

This section summarises the existing tourism products in the planning domain, including accommodation establishments, activities, national parks, and trophy hunting operations.

Accommodation:

The existing accommodation within and directly adjacent to the area is summarised in **Table 4** to **Table 7** below. SANParks supplied the information contained in **Table 4** (Erasmus, *pers comm.*, 2009), while the Department of Wildlife and National Parks supplied the data used in **Table 5** (Lopang, *pers comm.*, 2010).

Table 4: Summary of accommodation products inside the KTP (South African component, 2008).

Establishments:	10	Occupancy:	58.6%	Length of stay:	2.3 nights per camp, 4.7 nights in Park
Rooms:	107	Bed nights sold:	62,064	Guest numbers:	24,234
Campsites:	70	Camping nights sold:	52,109	Market level (% establishments):	10% up-market; 90% mid-market
Beds:	290	Purpose of visit:	Primarily leisure	Market segmentation:	72% South African; 24% overseas; 4% SADC

Table 5: Summary of campsites inside the KTP (Botswanan component).

Establishments:	18	Occupancy:	20%	Length of stay:	2.9 in Park
Campsites:	38	Camping nights sold:	16,544	Guest numbers:	5,635
Purpose of visit:	Primarily leisure	Market level (% establishments):	100% budget	Market segmentation:	77% South African; 14.4% Overseas; 8.6% SADC

Table 6: Summary of accommodation products near to the KTP inside South Africa.

Establishments:	3	Occupancy:	49.7%	Length of stay:	1.6
Rooms:	65	Bed nights sold:	25,043	Guest numbers:	20,394 (including 4,814 campers)
Campsites:	22	Camping nights sold:	7,934	Market level (% establishments):	100% budget
Beds:	135	Purpose of visit:	Primarily leisure	Market segmentation:	72% South African; 27% overseas; 1% SADC

Table 7: Summary of accommodation products near to the KTP inside Namibia.

Establishments:	7	Occupancy:	21%	Length of stay:	1.1
Rooms:	55	Bed nights sold:	6,931	Guest numbers:	8,435
Campsites:	42	Camping nights sold:	2,142	Market level (% establishments):	43% mid-market; 57% budget
Beds:	112	Purpose of visit:	Primarily leisure	Market segmentation:	12% South African; 84% overseas; 4% SADC

There are also upgrades and new developments planned or being undertaken at the moment. These are summarised below:

- It was reported by Lopang (*pers comm.*, 2010) that the Botswanan Department of Wildlife and National Parks recently awarded concessions for five new high value / low volume (up-market) accommodation facilities at Rooiputs, Marie se Draai, Polentswa, Union’s End and Mabuasehube. These concessions, which could result in about 120 additional beds in the Park, were awarded to two companies, and construction of the lodges is expected to start during 2010;
- In the draft tourism development plan for the KTP, V&L Landscape Architects (2006) suggest the following accommodation developments be considered by the relevant park authorities:
 - the award of five new lodge concessions in the Botswanan component, as described above;
 - room and campsite numbers at Mata Mata Rest Camp be increased in light of the border opening with Namibia (additional 14 beds; campsites not specified in the report);
 - room and campsite numbers at Nossob Rest Camp be increased following creation of a new circulation route and increasing volumes from the Mabuasehube area (additional 14 beds and space for 40 campers);
 - development of a new 8 bed Wilderness Camp at Eland; and
 - development of a new 8 bed Wilderness Camp at Kameelsleep.

Activities:

A variety of activities are available in the planning domain. These are listed in **Table 8** below:

Table 8: Tourism activities taking place on land adjacent to the focal area.

Product	Location	Main markets
Vehicle-based game viewing	Inside KTP	South African, SADC and overseas fully independent travellers (FITs)
Guided self-drive 4x4 trails	Inside KTP and on directly adjacent	Mainly South African FITs

Product	Location	Main markets
	farmland	
Self-drive 4x4 trails	Inside KTP and on directly adjacent farmland	Mainly South African FITs
Guided day visit to KTP from neighbouring lodges	Inside KTP	Neighbouring lodge operators using properly licenced game viewing vehicles
Biltong hunting	On private farmland adjacent to the planning domain	South African and SADC biltong hunters
Trophy hunting	On private farmland adjacent to the planning domain	Sport and trophy hunting outfitters
Cultural performances	Witdraai Farm near Andriesvale	Overseas FITs
Guided bushwalks	Witdraai Farm near Andriesvale	Overseas FITs
Overnight guided walking trails (Wilderness Leadership School)	Inside the KTP on the San heritage land	South African leaders, learners and community members
Environmental education	Inside the KTP at the Gemsbokplein EE Centre	South African school learners

Tourism markets

Research conducted for this study found that the following tourism markets (in order of volume) currently visit the planning domain:

- Fully independent travellers (FITs) using their own vehicles:** These visitors are predominantly South African and other SADC residents who have their own vehicles (often 4x4s), and want to explore the KTP and surrounding area. They travel with more time, and are normally fully self-contained. Their preferred accommodation is camping and budget or mid-level lodges that allow self-catering. These types of tourists are very common, representing more than 76% of all visitors to the KTP.
- FITs using hired vehicles:** These visitors are exclusively international and hire vehicles to explore South Africa and adjacent countries. They are more adventurous than those travelling in groups on formal tours and demand a more authentic experience, but often lack the confidence to travel too far off established routes. They normally have more time and like to stay in a variety of accommodation during their travels, from camping to tented camps and luxury lodges. While these types of tourists are very common in other parts of South Africa and Namibia, they are less common in the planning domain, largely due to its remoteness from established routes. Nonetheless, these numbers are increasing, especially since the Mata Mata border post recently opened allowing circuits and linkages with Namibia. In 2008, it was reported that 23.7% of all KTP visitors were foreigners, and that the vast majority of these were FITs.
- Biltong hunters:** These visitors are predominantly South African and other SADC residents that visit the region to hunt plains game for household biltong manufacturing. They normally travel in family units and are guided by farms owner. These visitors often prefer bush camping, away from formal accommodation facilities, however most hunting is conducted on private farms where there are also lodgings and serviced campsites available.
- Sport and trophy hunting outfitters:** These operators specialise in highly personalised hunting safaris. Visitors are predominantly international and visit the area primarily for hunting. While on safari they will often take time off for other activities, such as visits to the KTP. South African-registered professional hunting guides, and around four support staff, accompany them. They travel in very small groups of two to four guests. These visitors often prefer bush camping away from accommodation facilities, however most hunting is conducted on private farms where there are also lodgings and serviced campsites available.
- Small, medium and large vehicle-based tour operators:** This market makes use of different-sized vehicles ranging from small long-wheel-base safari vehicles through to buses and overland trucks, and visitors are exclusively international. These operators use a variety of accommodation ranging from

camping and budget through to luxury accommodation. According to SANParks (Erasmus, 2009), this market makes up less than 1% of total visitors to the KTP.

Tourism gateways & routes

There are currently five main **gateways** that visitors use to enter the planning domain. These are listed below and illustrated in **Map 3**:

- **Twee Rivieren** is the KTP headquarters, border post with Botswana and main entrance for most visitors, including the South African FIT market as explained above. Twee Rivieren has a range of visitor services, including a new and impressive information centre (combined with the entrance gate and park reception), fuel station and basic grocery store.
- **Andriesvale** serves the region both as a supply centre for tourists as well as a gateway to the area, obviously linking with Twee Rivieren. For these reasons – as well as its location at the confluence of several tourism routes (see below) – the settlement of Andriesvale is considered a **tourism hub** for the planning domain.
- **Mata Mata** is a border post and the KTP gate between South Africa and Namibia. This gateway is particularly popular with the overseas and South African FIT market on regional circuits. Since its official opening in October 2007, visitor volume through this gate has been relatively low. This is largely due to the compulsory two-night stopover in the Park that has been imposed to prevent transit traffic congesting the linear route along the Auob River. A further constraint that exacerbates the low volume is the very high demand for, and limited supply of, accommodation in the Park.
- **Mabuasehube** is a Botswanan entrance to the KTP, and provides access via the Trans-Kalahari Highway. Due to its remoteness and current difficult access, visitor volume through this gate is very low. According to V&L Landscape Architects (2006), this gateway and tourism route (see below) should be developed and promoted to enable easier access for the Gauteng FIT market.
- **Kaa** is a Botswanan entrance gate to the KTP, and provides access via the Kang area of the Trans-Kalahari Highway. Due to its remoteness and current difficult access, visitor volume through this gateway is very low.

There are currently six main **tourism routes** that visitors use to travel through the area. These are listed below and illustrated in **Map 3**:

- **Gauteng – Upington/Van Zyl's Rus – Twee Rivieren** route linking the largest source market, Gauteng, with the planning domain via the N14 motorway;
- **Cape Town - Augrabies - Upington – Twee Rivieren** route linking the second largest source market, Cape Town, and Springbok with Augrabies Falls and the planning domain via the N14 and N7 motorways;
- **Gauteng – McCarthy's Rest - Mabuasehube** route linking Gauteng with the Botswanan component of the KTP via McCarthy's Rest border post;
- **Namibia - Mata Mata - Twee Rivieren** route linking the planning domain with Namibian attractions such as the Fish River Canyon and Windhoek;
- **Namibia - Rietfontein – Twee Rivieren** route linking the planning domain with attractions in southern Namibia such as the Fish River Canyon and Warmbad; and
- **Trans-Kalahari – Kaa / Mabuasehube** route linking the Trans-Kalahari Highway with either the Kaa or Mabuasehube area.

According to V&L Landscape Architects (2006), there is potential to reduce the distance to the Kgalagadi from Gauteng by improving regional and internal linkages. For example, V&L Landscape Architects (2006) suggest creation of new a link road from the Trans-Kalahari Highway via Mabuasehube to the Nossob River, which would shorten the distance from Gauteng to the Park by over 300km. It was reported that such a link would also provide an increased flow of visitors through the Botswana component of the KTP.

Tourism trends & issues

According to Saayman et al (2008), some important trends and issues affecting tourism at the regional level are listed below:

- **Medium-impact / medium-value tourism predominates**

The KTP is the principal attraction and SANParks the major supplier of tourism services in the region. As a consequence, regional supply and demand trends have been heavily influenced by SANParks' "medium-impact / medium-value" tourism model (V&L Landscape Architects, 2006). Inside and outside the Park, most accommodation and services are aimed at self-drive FITs, mainly South Africans from Gauteng and the Western Cape but also foreign nationals from Namibia and various European countries. Visitors mostly use SANParks accommodation but a significant number overnight in private facilities on the approach routes to the Park. A very small percentage travels in organized groups operated by tourism professionals.

- **High-value lodge tourism largely absent**

The development of high-value lodge tourism in and around the KTP is hampered by several factors. The Park has an entrenched profile as a self-drive middle-market destination and SANParks is committed to a continuation of the current approach; there is no cluster of private high-value lodges on the fringes of the KTP (unlike the situation around other major parks such as Kruger and Addo); and the Kgalagadi is remote from southern Africa's high-value tourism nodes and flows. These factors make it difficult to integrate the area into existing portfolios and circuits, discouraging entry by the top-end ecotourism firms and entrenching the status quo. The one exception in the greater area is the Oppenheimer-owned Tswalu property north of Kuruman, which draws on the wealth and prestige of its owners, and is aimed at the top tier of the ecotourism market.

The draft Tourism Development Framework (TDF) for the KTP (V&L Landscape Architects, 2006) recognizes this reality and recommends a continuation of the medium impact/medium value approach in the South African component of the KTP. It does acknowledge the potential for low-impact / high-value tourism but recommends it be developed mainly on the Botswana side of the Nossob. The TDF makes two exceptions to the general division: the existing !Xaus Lodge west of the Auob and a proposed new low density "San community concession" in the area immediately north of the Nossob/Auob confluence.

- **International market shifting towards more adventurous itineraries and authentic experiences**

Elsewhere in the southern African region, there is a well-documented shift from scheduled tours to custom-tailored tours and packaged self-drive itineraries for the international market. These visitors are also becoming more adventurous, demanding better quality and more authentic experiences including traditional culture.

- **International demand for trophy hunting in the Kalahari**

It appears there is demand from international hunters to visit the Kalahari because of the quality of “wilderness” experience on offer. The possibility of hunting with ǀKhomani San trackers is an added attraction in this market.

Tourism opportunities

Given the history, access, attractions, flows and trends described above, the following high-level tourism opportunities may be identified:

- **Consolidate the existing domestic market**

The draft TDF (V&L Landscape Architects, 2006) and the market study conducted by the Institute for Tourism and Leisure Studies of the North-West University (Saayman et al, 2008) recommend building on the KTP’s existing brand value and market base. However, the South African side of the Park is already well developed and there is limited scope to expand existing accommodation and related products.

- **Expand the international FIT market**

The growth in the international FIT market in the SADC region, notably in Namibia and Botswana, provides a unique opportunity for improving integration with neighbouring countries and increasing visitor flows through the planning domain. To achieve this, new products tailored for the international market need to be developed. These are discussed below.

- **Introduce low-density / high-value tourism along the Auob corridor**

In line with the KTP TDF and expected growth in the international market, it is recommended that at least one low-density / high-value accommodation product be developed along the Auob River (refer to section 3.4).

- **Increase opportunities for prestige trophy hunting**

During market research conducted during this study it was revealed that the trophy and biltong hunting market is very well supplied in the region. However there appears to be an opportunity to attract more discerning international hunters interesting in hunting with San trackers and guides, as well as bow hunting. This is discussed further in section 4.3.

- **Introduce high quality, authentic cultural activities**

Experience in the SADC region has demonstrated the attractiveness of high-quality, authentic cultural activities to the international market. Such activities are largely underdeveloped in the planning domain. Existing activities are poorly located and generally of low quality and authenticity.

- **Introduce more guided activities**

Guided self-drive 4x4 trails, guided trails, interpretative walks and other activities in the KTP and SADC region have proven to be very popular with visitors. This is an indication of the growing demand for authentic adventure and educational activities. It is recommended that more of these activities are developed in the planning domain.

2.6 Concessioning approach

Introduction

Where tourism developments and activities are established by third parties, the relationship between the land / resource owner and the developer / operator normally takes the form of a concession. A tourism concession is the right to use another party's land or resources for commercial purposes, which could be to conduct a tourism activity, such as a 4x4 eco-trail, or to develop and operate an accommodation facility such as a safari lodge.

Types & fees

Where tourism operations involve the development, rehabilitation or management of permanent infrastructure, they may take the form of:

- **build, operate and transfer concessions** (BOT – a concessionaire is granted the right to build and operate infrastructure for a defined period before transferring it to the land authority);
- **rehabilitate, operate and transfer concessions** (ROT – a concessionaire is granted the right to rehabilitate existing infrastructure, operate it for a defined period before transferring it to the land authority); and
- **maintain, operate and transfer concessions** (MOT – a concessionaire is granted the right to manage existing infrastructure for a defined period before transferring it to the land authority).

BOT and ROT concessions are generally for periods that give concessionaires the opportunity to make a fair return on the capital and expertise they invested in the enterprise, as well as compensate for the risks they have taken during the course of operation. In southern Africa it is common to find BOT and ROT concessions being offered on 20-year terms. This is sometimes extended up to 45-year terms where very large capital investments are involved or where business risks are exceptionally high.

Concessions conferring rights to conduct commercial activities without the development of permanent infrastructure normally take the form of **activity concessions**, which are generally for shorter periods than BOTs and ROTs - typically around five years.

For all types of operations, it is best practice for concession fees to be calculated as a percentage of gross revenue (but excluding VAT, commissions retained by third parties, insurance proceeds etc), but with a guaranteed minimum fee. Such arrangements allow concessionaires to pay lower fees while their businesses are becoming established, however they also allow concessioning authorities to benefit from business success once the operations have matured. Concession fees typically range from 5% to 12% of gross income, with the later normally only achieved in prime and mature tourism destinations.

2.7 Zoning

Zoning is critical to help achieve the goals of: 1) protecting important habitats, biodiversity and heritage; 2) enabling economic development and sustaining the livelihoods of local residents; and 3) providing access to natural areas and resources for the public. Zoning therefore enables scarce or sensitive areas to be protected, while at the same time allowing an acceptable level of use in order to achieve economic development and the maintenance of livelihoods. It is also

important to prevent conflicts between different user groups and to enhance the experience of visitors.

The zoning for KTC and the ǀKhomani San farmland has already been drafted and is included in management plans. These zoning schemes, and how they affect tourism, will be discussed in the following sections of this report, with proposed amendments where required.

3. Kgalagadi Transfrontier Park

3.1 Overview

Location

The Kgalagadi Transfrontier Park (KTP) is a trans-boundary protected area spanning 3,800,000ha across northern South Africa and south-western Botswana, and is bordered to the west by Namibia (refer to **Map 4**).

Access

Visitor entry to the KTP is currently possible via four public gates and one community gate, as listed in **Table 9** below and illustrated in **Map 4**.

Table 9: Park entry gates for KTP.

Name	Location	Entry from?	Type of gate
Twee Rivieren	Southern most point of Park	South Africa & Botswana	Public
Mata Mata	South Western corner	Namibia	Public
Kaa	Northern most point of Park	Botswana	Public
Mabuasehube	Eastern most point of Park	Botswana	Public
Community gate	West of Twee Rivieren	South Africa	Private gate for the !Khomani San

Access into the KTP is either by road or air. The access possibilities are summarised in **Table 10** below.

Table 10: Access in the KTP.

Access by 4x4 vehicles	Access by 2x4 vehicles	Access by aircraft
<ul style="list-style-type: none"> From the east via McCarthy's Rest and Mabuasehube From the north via Kang and Kaa 	<ul style="list-style-type: none"> From the south via the R360 tarred road From Namibia via the surfaced C15 gravel road 	<ul style="list-style-type: none"> Via registered airstrip at Twee Rivieren

Internal roads within the KTP comprise two main routes along the Nossob and Auob Rivers that are gravel-surfaced and accessible to all vehicle types (including sedans). There are also two linkage tracks between the main routes, one in the south, and another mid-way between Twee Rivieren and Mata Mata / Unions End. Other roads and tracks inside the Park, away from the main arterial routes, are sandy tracks and thus require 4x4 vehicles for year-round access.

As explained earlier, the KTP is the main attraction for tourists visiting the planning domain. **Table 11** and **Table 12** indicate that the vast majority of visitors to the Park are South African nationals. Furthermore, according to research by the North-West University (Saayman et al, 2008), the majority of visitors are middle-aged people from Gauteng or Western Cape Provinces who speak Afrikaans as a home language, and are self-drive tourists using their own vehicles.

Map 4: The Kgalagadi Transfrontier Park

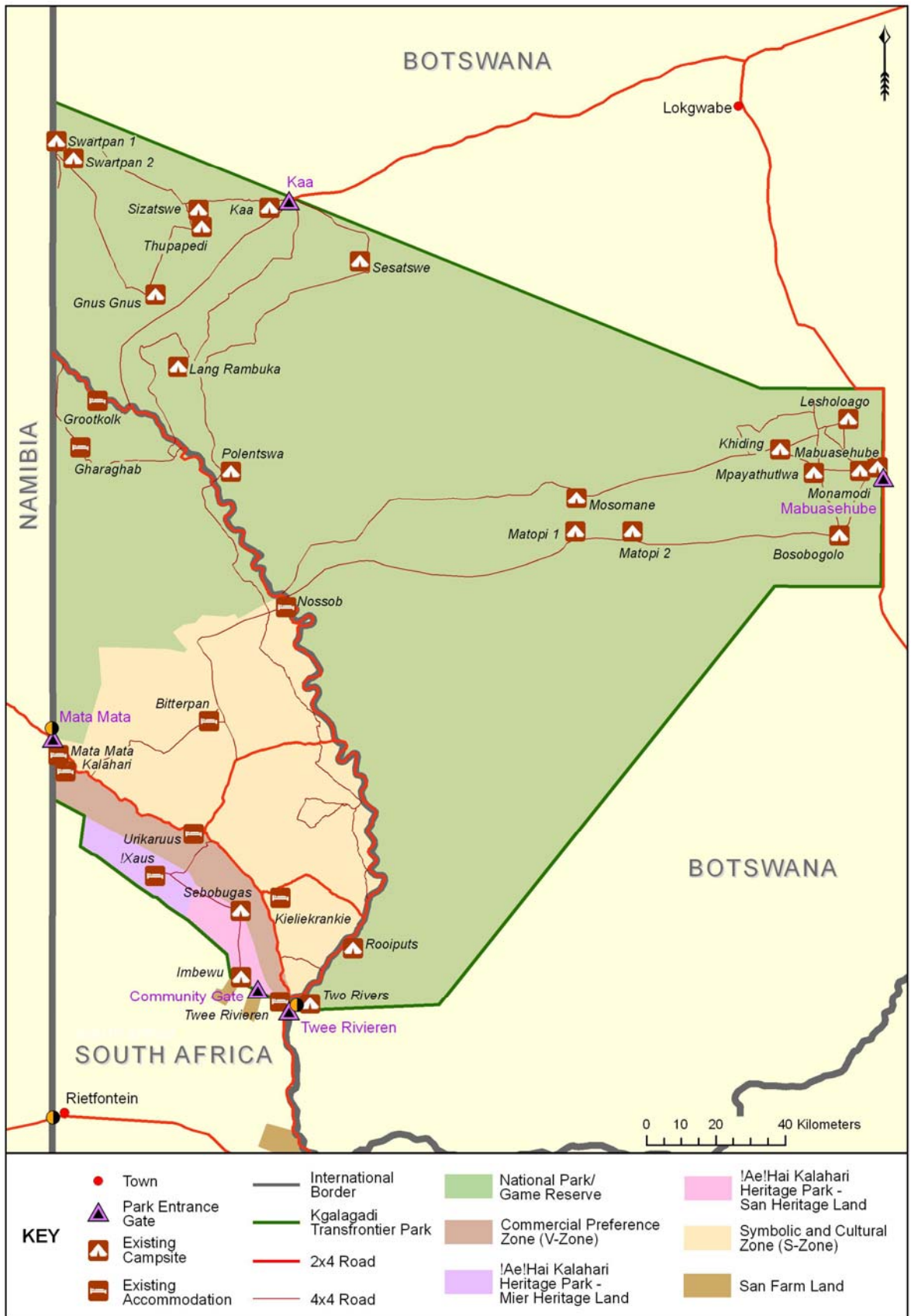


Table 11: Park entry data for the KTP (calendar year of 2008, South African component).

Market segmentation	Tourist numbers	Percentage
South African	19,192	72.6%
SADC	975	3.7%
Overseas	6,276	23.7%
TOTAL	26,443	100%

Table 12: Day versus overnight visitors to KTP (calendar year of 2008, South African component).

Market segmentation	Tourist numbers	Percentage
Day visitors	2,209	8.4%
Overnight visitors	24,234	91.6%
TOTAL	26,443	100%

As outlined in **Table 4**, the number of bed-nights and camp-nights sold in the South African component of the KTP was 115,910 in 2008 meaning that the 24,234 overnight visitors stayed on average for 4.8 nights inside the Park. It is furthermore assumed that visitors migrate through the Park during their visit and on average stay at two different camps during their stay.

The profile of visitor to the Botswanan component of KTP is very similar to that of the South African component. South Africans make up the majority of visitors, however there is a lower proportion of overseas visitors, which is likely because of the more difficult access conditions and remoteness of this component. On the other hand this component has a larger proportion of African visitors.

In 2008 16,544 camping nights were sold to 5,635 guests in the Botswanan component, and therefore the average length of stay for overnight visitors to the Park during this period was 2.9 nights per guest. While this appears lower than the South African component, it is likely that many of the visitors to the Botswanan component also visited the South African side of the Park during their stay.

Table 13: Park entry data for the KTP (calendar year of 2008, Botswanan component).

Market segmentation	Tourist numbers	Percentage
South African	4,749	77%
SADC	531	8.6%
Overseas	885	14.4%
TOTAL	6,165	100%

Table 14: Day versus overnight visitors to KTP (calendar year of 2008, Botswanan component).

Market segmentation	Tourist numbers	Percentage
Day visitors	530	8.6%
Overnight visitors	5,635	91.4%
TOTAL	6,165	100%

Historical & social context

On the 7th April 1999 Botswana and South Africa signed a bilateral agreement to formalise collaboration in the management of two adjacent national parks - Gemsbok National Park in Botswana, and Kalahari Gemsbok National Park in South Africa. The KTP emerged from this agreement. Collectively these parks comprise an area of around 3,800,000ha, making it one of the largest conservation areas in Africa.

The boundary between the two parks also forms the international border between South Africa and Botswana. There is however no physical barrier, allowing free migration of wildlife. KTP's western boundary is fenced and forms the international border between Namibia, South Africa and Botswana.

A new border post between Namibia and South Africa was opened at Mata Mata on 13th October 2007, allowing the flow of tourists between these countries as well as Botswana. This innovative development has enabled the Park to become one destination for tourists on **regional circuits**, rather than simply a one-stop destination. It is expected that this will result in larger visitor flow across all market segments, including the overseas self-drive market, which has increased significantly in Namibia over recent years.

KTP is administered at a strategic level by a joint management board (JMB) comprising delegates from Botswana's and South Africa's park authorities. However operational management within the larger strategic framework remains the responsibility of each respective country. Furthermore, 57,903ha of the South African section of KTP is a contractual national park as explained in section 2.2, and is thus administered under another JMB comprising representatives of SANParks and the Mier and ǀKhomani San communities.

Environmental context

Important environmental issues to be considered prior to any tourism development in the KTP include:

- EIA's are required for tourism developments in national parks and SANParks environmental guidelines need to be followed (see also Annexes B & C).
- The availability, on a sustainable basis, of sufficient water of acceptable quality for any developments. All proposed developments will require professional assessment of water availability.
- Electricity is available at Twee Rivieren, but not beyond this node. It is unlikely that electricity provision will be possible other than in the immediate environs of Twee Rivieren, so any developments beyond this area will require alternative sources of energy, which will have to be detailed in the EIA reports.
- Waste management poses challenges, and will require appropriate plans which also require elaboration in the EIA report.
- Although the area is relatively low in endemics and Red Data species, species of concern include the grapple plant (*Harpagophytum recumbens*) as well as species such as the pangolin. Presence of these and any other species of concern flagged by SANParks or the ǀKhomani San should be assessed during the EIA process, and, if encountered, mitigatory actions proposed.
- No off-road driving is permitted, and any proposed new game viewing, 4x4 routes or access tracks will require assessment during the EIA process.

- All concession agreements must specify that an annual environmental audit is to be conducted and submitted to the Joint Management Board (JMB) for the KTP. The JMB is responsible and accountable for ensuring compliance with the requirements of the record of decision and environmental management plan (EMP) emanating from the EIA process.

Tourism resources

The KTP is characterised by its unique Kalahari Desert landscapes consisting of rolling red dune fields, wide ephemeral river beds, pan systems, open grasslands, and acacia woodlands. It is well known for its desert-dwelling wildlife, including among others springbok, wildebeest, eland, lion, cheetah, leopard, giraffe, oryx, and red hartebeest. The Park has a particularly good reputation for viewing lion and cheetah kills, and is popular with visitors seeking a “wilderness experience”. While the KTP has rich indigenous cultural heritage, up to now this has been under-promoted.

Existing products & markets

Accommodation

The current accommodation products in the KTP and their respective markets are outlined in **Table 15** and **Table 16** below.

Table 15: Existing accommodation and their respective markets in the KTP (South African component)

Product	Location, operation	Type, size, performance	Markets
Bitterpan Wilderness Camp	<ul style="list-style-type: none"> • South central KTP between the Auob and Nossob Rivers • Developed and operated by SANParks 	<ul style="list-style-type: none"> • Mid-market camp • 4 rooms, 8 beds • Achieved 75.7% bed occupancy in 2008, with 2,211 bed-nights sold 	<ul style="list-style-type: none"> • 72% South African; 4% SADC; 24% Overseas • 76% FIT (own vehicle); 23% FIT (hired vehicle); 1% Tour operator
Gharaghab Wilderness Camp	<ul style="list-style-type: none"> • North western KTP, south of the Nossob River near Union's End • Developed and operated by SANParks 	<ul style="list-style-type: none"> • Mid-market camp • 4 rooms, 8 beds • Achieved 66.9% bed occupancy in 2008, with 1,915 bed-nights sold 	<ul style="list-style-type: none"> • 72% South African; 4% SADC; 24% Overseas • 76% FIT (own vehicle); 23% FIT (hired vehicle); 1% Tour operator
Grootkolk Wilderness Camp	<ul style="list-style-type: none"> • North western KTP, on the Nossob River near Union's End • Developed and operated by SANParks 	<ul style="list-style-type: none"> • Mid-market camp • 4 rooms, 8 beds • Achieved 87% bed occupancy in 2008, with 2,499 bed-nights sold 	<ul style="list-style-type: none"> • 72% South African; 4% SADC; 24% Overseas • 76% FIT (own vehicle); 23% FIT (hired vehicle); 1% Tour operator
Kalahari Tent Camp	<ul style="list-style-type: none"> • South western KTP, south of the Auob River near Mata Mata • Developed and operated by SANParks 	<ul style="list-style-type: none"> • Mid-market camp • 15 rooms, 33 beds • Achieved 68.3% bed occupancy in 2008, with 9,328 bed-nights sold 	<ul style="list-style-type: none"> • 72% South African; 4% SADC; 24% Overseas • 76% FIT (own vehicle); 23% FIT (hired vehicle); 1% Tour operator
Kieliekrankie Wilderness Camp	<ul style="list-style-type: none"> • Southern KTP, between the Auob and Nossob Rivers north of Twee Rivieren • Developed and operated by SANParks 	<ul style="list-style-type: none"> • Mid-market camp • 4 rooms, 8 beds • Achieved 89.1% bed occupancy in 2008, with 2,596 bed-nights sold 	<ul style="list-style-type: none"> • 72% South African; 4% SADC; 24% Overseas • 76% FIT (own vehicle); 23% FIT (hired vehicle); 1% Tour operator
Mata Mata Rest Camp	<ul style="list-style-type: none"> • South western KTP, at the Mata Mata border post / park entrance • Developed and operated by SANParks • To be expanded in future 	<ul style="list-style-type: none"> • Mid-market lodge and campsite • 5 rooms, 18 beds, 20 campsites • Achieved 61.4% bed occupancy and 66.9% 	<ul style="list-style-type: none"> • 72% South African; 4% SADC; 24% Overseas • 76% FIT (own vehicle); 23% FIT (hired vehicle); 1% Tour operator

Product	Location, operation	Type, size, performance	Markets
		campsite occupancy in 2008, with 5,239 bed-nights and 15,405 camping nights sold	
Nossob Rest Camp	<ul style="list-style-type: none"> Central KTP, on the Nossob River Developed and operated by SANParks To be expanded in future 	<ul style="list-style-type: none"> Mid-market lodge and campsite 18 rooms, 59 beds, 20 campsites Achieved 70.9% bed occupancy and 67.9% campsite occupancy in 2008, with 13,184 bed-nights and 19,830 camping nights sold 	<ul style="list-style-type: none"> 72% South African; 4% SADC; 24% Overseas 76% FIT (own vehicle); 23% FIT (hired vehicle); 1% Tour operator
Twee Rivieren Rest Camp	<ul style="list-style-type: none"> South most point of KTP, at the park HQ and southern entrance Developed and operated by SANParks 	<ul style="list-style-type: none"> Mid-market lodge and campsite 37 rooms, 116 beds, 30 campsites Achieved 55.8% bed occupancy and 52.8% campsite occupancy in 2008, with 22,376 bed-nights and 16,874 camping nights sold 	<ul style="list-style-type: none"> 72% South African; 4% SADC; 24% Overseas 76% FIT (own vehicle); 23% FIT (hired vehicle); 1% Tour operator
Urikaruus Wilderness Camp	<ul style="list-style-type: none"> Southern KTP, on the Auob River Developed and operated by SANParks 	<ul style="list-style-type: none"> Mid-market camp 4 rooms, 8 beds Achieved 93.4% bed occupancy in 2008, with 2,716 bed-nights sold 	<ul style="list-style-type: none"> 72% South African; 4% SADC; 24% Overseas 76% FIT (own vehicle); 23% FIT (hired vehicle); 1% Tour operator
!Xaus Lodge	<ul style="list-style-type: none"> Southern KTP, in the dune field 30km south of the Auob River in the !Ae!Hai Kalahari Heritage Park Developed by SANParks for the San and Mier communities Operated under a management contract with Transfrontier Parks Destinations (TPD) 	<ul style="list-style-type: none"> Up-market lodge 12 rooms, 24 beds Achieved 19.76% bed occupancy in 2008, with 1,737 bed-nights sold 	<ul style="list-style-type: none"> 42% South African; 58% Overseas 42% FIT (own vehicle); 57% FIT (hired vehicle); 1% Tour operator

According to Lopang (*pers comm.*, 2009), the Botswanan Department of Wildlife and National Parks do not collect occupancy and visitor statistics for individual campsites in the KTP. They do however collect data from each entry station. Available data includes the number of day and overnight visitors, number of nights sold in the park, as well as country of origin. This information is summarised in **Table 16** below.

Table 16: Visitor information from entry gates to the KTP (Botswanan component).

Entry gate	Location	Visitor profile	Markets
Two Rivers	<ul style="list-style-type: none"> Southern KTP Opposite Twee Rivieren 	<ul style="list-style-type: none"> 10.8% (291) day; 89.2% (2,413) overnight 7,397 nights sold from gate Average of 3 nights in park 	<ul style="list-style-type: none"> 76.8% South African; 7.5% SADC; 15.7% Overseas
Mabuasehube	<ul style="list-style-type: none"> Eastern KTP 	<ul style="list-style-type: none"> 5.7% (167) day; 94.3% (2,760) overnight 7,983 nights sold from gate Average of 2.9 nights in park 	<ul style="list-style-type: none"> 80% South African; 9.4% SADC; 10.6% Overseas

Entry gate	Location	Visitor profile	Markets
Kaa	<ul style="list-style-type: none"> Northern KTP Opposite Twee Rivieren 	<ul style="list-style-type: none"> 13.5% (72) day; 86.5% (462) overnight 1,164 nights sold from gate Average of 2.5 nights in park 	<ul style="list-style-type: none"> 62% South African; 9.9% SADC; 28.1% Overseas

Activities

The main tourism activities currently taking place in the KTP are 4x4 trails and vehicle-based game viewing. The 4x4 trails are listed in **Table 17** and **Table 18** below and illustrated in **Map 5** and **Map 6**.

Table 17: Existing 4x4 routes in the KTP (South African component)

4x4 Trail	Location, operation	Type, Length
Leeuwdril 4x4 Trail	<ul style="list-style-type: none"> East-west route linking Leeuwdril with Houmoed 	<ul style="list-style-type: none"> One way Self drive Day activity trail 13km
!Xaus 4x4 Trail	<ul style="list-style-type: none"> North-south route linking Rooibrak with !Xaus lodge 	<ul style="list-style-type: none"> Two way Self drive Access track for exclusive use by !Xaus Lodge guests 29km (one way)
Nossob 4x4 Eco-trail	<ul style="list-style-type: none"> North-south route east of the Nossob River between Kij Kij and Polentswa 	<ul style="list-style-type: none"> Two way Guided self drive 3 night activity trail 214km
Bitterpan 4x4 Trail	<ul style="list-style-type: none"> North-south route linking Bitterpan with Nossob 	<ul style="list-style-type: none"> One way Self drive Access track for exclusive use by Bitterpan guests 120km
Gharagab 4x4 Trail	<ul style="list-style-type: none"> West-east route between Unions End and Lijersdraai 	<ul style="list-style-type: none"> One way Self drive Access track for exclusive use by Gharagab guests 61km

Map 5: Location of the existing 4x4 trails in the KTP (South African component).

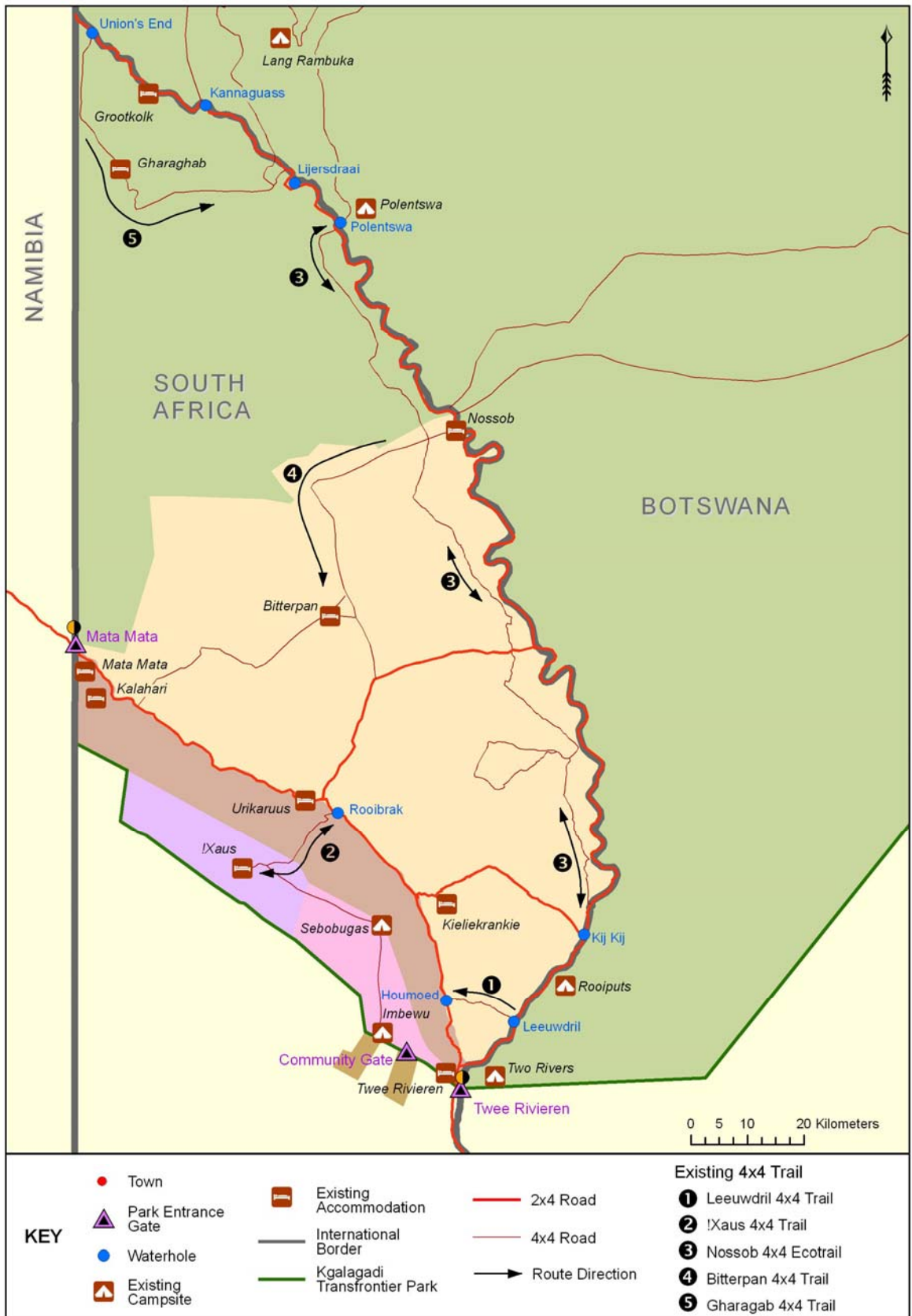
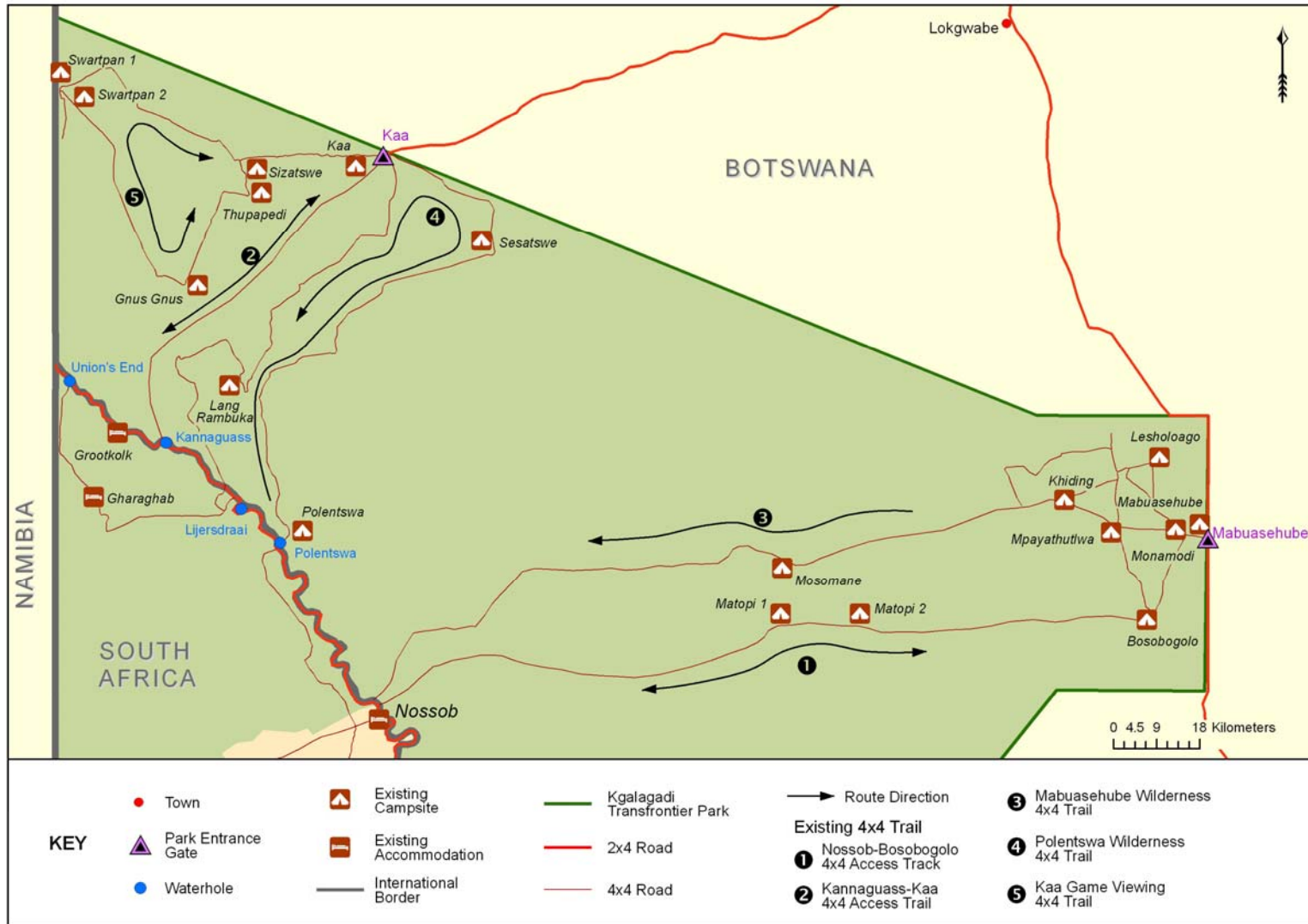


Table 18: Existing 4x4 routes in the KTP (Botswanan component)

4x4 Trail	Location, operation	Type, Length
Nossob-Bosobogolo 4x4 Access Track	<ul style="list-style-type: none"> • East-West route linking the Nossob River with Mabuasehube area 	<ul style="list-style-type: none"> • Two way • Self drive • Access route • 170 km each way
Kannaguass-Kaa 4x4 Access Trail	<ul style="list-style-type: none"> • North-South route linking Kannahuass with the Kaa entrance gate 	<ul style="list-style-type: none"> • Two way • Self drive • Access route • 84 km
Mabuasehube Wilderness 4x4 Trail	<ul style="list-style-type: none"> • East-West route linking the Nossob River with Mabuasehube area 	<ul style="list-style-type: none"> • One way • Self drive • 1 night activity trail • 155km
Polentswa Wilderness 4x4 Trail	<ul style="list-style-type: none"> • Circular route starting at Polentswa, then proceeding to Kaa, and finishing at Lijersdraai. 	<ul style="list-style-type: none"> • One way • Self drive • 3 night activity trail • 257km
Kaa Game Viewing 4x4 Trail	<ul style="list-style-type: none"> • Circular route to the west starting and finishing at Kaa 	<ul style="list-style-type: none"> • Two way • Self drive • Game viewing activity trail • 191km

Furthermore, it was reported that the Wilderness Leadership School (WLS) conducts guided walking trails in the Ae!Hai Kalahari Heritage Park under a verbal agreement with the ǀKhomani San community. According to the WLS, 14 trails were conducted in the last year, with a total of 62 participants. The walking trails vary in length, ranging from half a day to 5 nights.

Map 6: Location of the existing 4x4 trails in the KTP (Botswanan component)



3.2 Tourism developments & activities

The proposed developments and activities for the !Khomani San inside KTP are summarised in **Table 19** below, and illustrated in maps throughout the following sections.

Table 19: Proposed tourism developments and activities for the !Khomani San in the KTP.

!Xaus Lodge Concession (existing)	Southern Auob Concession (new)	!Khomani San 4x4 Route & Bush Camp Concession (new)
<ul style="list-style-type: none"> Option 1: Expand current operation to a maximum of 24 rooms (48 beds) Option 2: Only address current shortcomings in existing lodge (guide rooms, water supply, electricity supply) Develop a 4x4 eco-trail and unserviced bush camp High priority 	<ul style="list-style-type: none"> Light footprint, upmarket lodge of 24 to 48 beds Developed via a build operate transfer concession with a private partner Very high priority 	<ul style="list-style-type: none"> 4x4 eco-trail between Twee Rivieren and Mata Mata At least 2 primitive bush camps Developed and operated in partnership with an existing operator Low priority
Cultural Activities from Resorts & Camps (new)	Wilderness Leadership Trails (existing)	Heritage Centre (new)
<ul style="list-style-type: none"> Guided interpretative walks & other activities at resorts & camps in KTP Developed and operated in partnership between !Khomani San, SANParks & private concessionaires Preceded by guide training & entrepreneurial development Medium priority 	<ul style="list-style-type: none"> Formalisation of existing trails conducted by Wilderness Leadership School into a concession contract High priority 	<ul style="list-style-type: none"> New heritage centre at Twee Rivieren to show case heritage of the area To be linked with World Heritage listing of area Very high priority

3.3 !Xaus Lodge Concession

Location & description

!Xaus Lodge is an existing concession situated near the boundary between the !Khomani San and Mier land within the Ae!Hai Kalahari Heritage Park, some 29km south of the Auob River (refer to **Map 7**)¹. This operation is located within a 4,000ha concession area (referred to as the Management Area in the concession agreement).

The lodge is a 12-room / 24-bed facility that was constructed and equipped by SANParks for the !Khomani San and Mier communities (through the public works department using poverty relief funding). !Xaus Lodge is operated under a management agreement with a private tourism company (Transfrontier Park Destinations – TPD), and management fees are paid by TPD to SANParks, the !Khomani San and Mier community in equal proportions.

Rationale

TPD started operations at !Xaus Lodge in 2007 and has achieved reasonable growth in bed occupancy during its first three years. Bed occupancy of 14% was achieved in 2007-8, 19% in 2008-9, and 30% so far in 2009-10, representing growth of 26% and 37% in years two and three. During the same period the market mix has changed significantly from being predominantly South African (54% in 2008) to being mainly foreign (69% in 2010) (Gray, *pers. comm.*, 2010). This is in strong contrast to the SANParks products operated in the Park, which might demonstrate the attractiveness of this type of product in the area to the overseas market.

The lodge is in a start-up phase (which typically lasts between three and five years) and has to date achieved limited yields in the way of concession revenue and other project benefits to the communities and SANParks. This may, to a large degree, be a result of the fact that the lodge is in its start-up phase but it has also revealed certain short-comings in the operating environment, the lodge, and the project itself, including:

- not having guide rooms and thus having to accommodate guides in guest rooms;
- poor ground water quality, which is also limited in quantity;
- inefficient and environmental unfriendly electricity generation;
- lack of scale, which is an obstacle to accommodating groups as well as accommodating over-flow in peak season;
- limited activities on offer in the immediate vicinity;
- distance of the lodge from the main game viewing areas in the Auob and Nossob Rivers;
- distance of lodge from main access routes and the air strip at Twee Rivieren (which accounts for the limited number of fly-in guests);

¹ In preparing **Map 7** the !Xaus Lodge Management Area boundary stipulated in the concession agreement was used. Additionally, the original Ae!Hai Kalahari Heritage Park boundaries were used, as per the contract park agreement between the !Khomani San and Mier communities, and SANParks. During the course of this study it was reported that boundary changes had been made to ensure the Management Area is equally divided between the !Khomani San and Mier land in the park.

- lack of similar lodges in the region, which means the product is difficult to integrate into larger regional circuits or itineraries; and
- the project model itself is based on fully donor-funded infrastructure and equipment, which calls into question the sustainability of future improvements, maintenance and refurbishment of the concession assets.

It is recommended to address these issues through a variety of mechanisms, including adding value to the current product by improving the support infrastructure (such as water and electricity supply), incorporating a new 4x4 eco-trail and bush camp (which has potential to diversify current markets and activities on offer), the construction of guide rooms at the current lodge and (possibly) a satellite camp, which could add value in peak seasons.

Attractions

The concession's main attractions are:

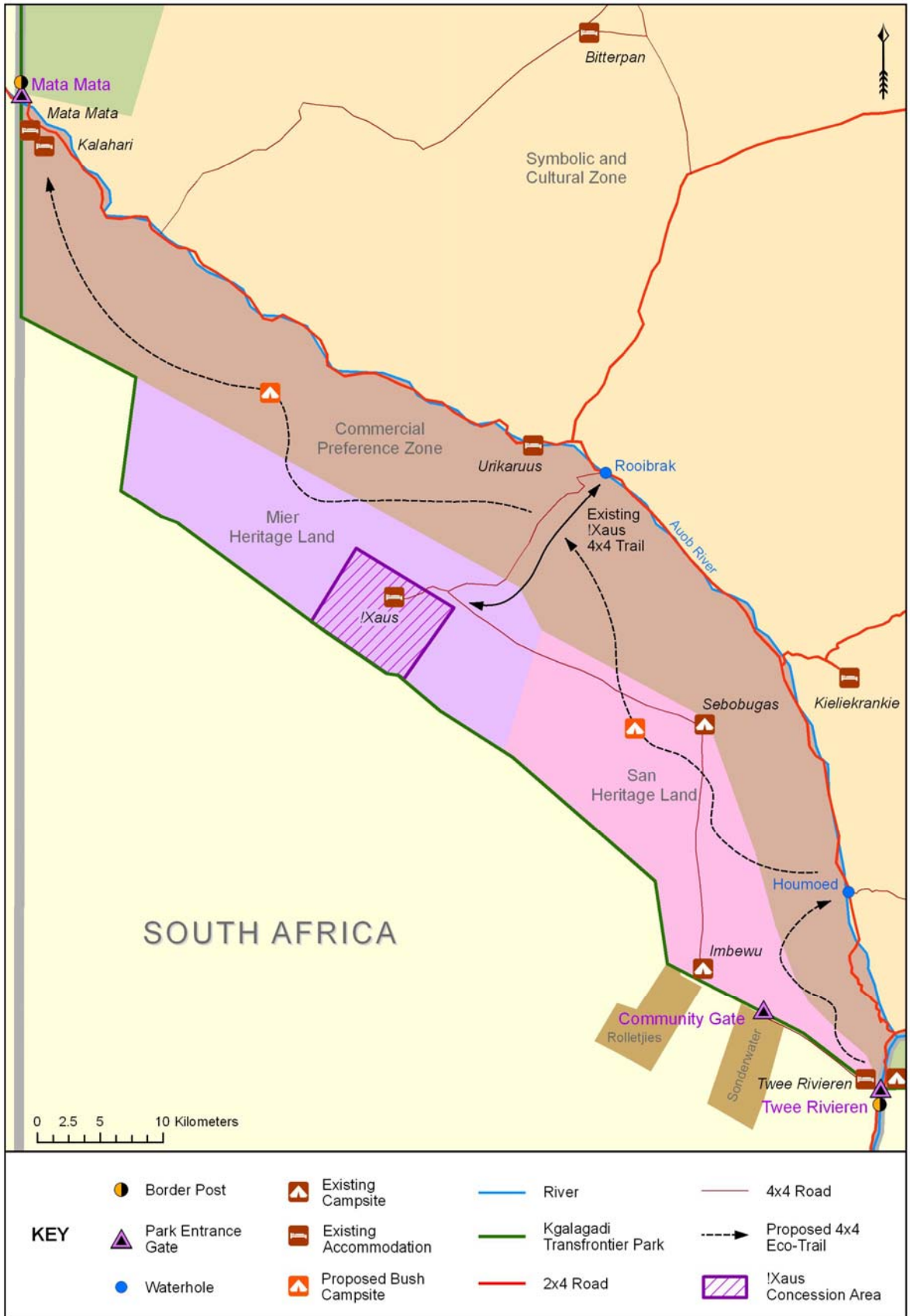
- wildlife, including the signature species of the southern Kalahari;
- scenic desert landscapes including the striking red Kalahari dune veld and the pan system of the Klein Skrij area;
- the cultural heritage of the †Khomani San; and
- the opportunity to drive through an area of the Kalahari dune fields not otherwise open to the public.

Preferred markets

This concession is aimed at the upper end of the ecotourism industry and primarily is expected to attract the following markets:

- high-income regional and international FIT groups on regional itineraries; and
- small tour operator-conducted international groups on regional itineraries.

Map 7: Location of the !Xaus Lodge Concession.



Zoning

This existing concession falls within the Kalahari dune field south of the Auob River, which has been demarcated as a “low sensitivity zone” in the Draft Joint Zoning Plan (Beyond Horizons Consulting & PPF, 2006).

In terms of the tourism zoning, the Draft Joint Zoning Plan designates this area for “medium density motorised access”. Furthermore the Tourism Development Framework (TDF) (V&L Landscape Architects, 2006) zones the area as part of the “Primary Tourism Experience Zone.”

According to the !Ae!Hai Heritage Park Management Plan (Odendaal, 2009), the 4,000ha concession area has been designated as a “lodge zone”. This zone has been created specifically to provide for the development and activity requirements of !Xaus Lodge. According to the management plan guidelines, any new developments at the site only require the written permission of the JMB.

The current KTP and !Ae!Hai Heritage Park zoning plans are therefore compatible with this proposed concession and no amendments are required for this concession to be further developed. A zoning summary for this concession is outlined in **Table 20**.

Table 20: Zoning summary - !Xaus Lodge Concession.

Environmental sensitivity zoning:	KTP Joint Zoning Plan:	SANParks equivalent:	!Ae!Hai Heritage Park Management Plan:
Low sensitivity	Medium density motorised (Zone 3a)	Low intensity leisure	Lodge zone

Indicated developments

It is recommended that the following options be considered to improve the profitability of this concession and thus increase benefits to the four parties involved:

Option 1:

- expand the current operation to a maximum of 24 rooms, possibly divided between the current lodge and a second satellite lodge at another site appropriately located within the existing or an expanded concession area. This should be considered with a review of current pricing and target markets with the overall aim of growing occupancy and total turnover;
- address short-comings in the existing lodge, including provision of guide rooms, improving water supply, addressing inefficient electricity supply; and
- demarcate a new 4x4 eco-trail, including at least one unserviced bush camp.

Option 2:

- address short-comings in the existing lodge, including provision of guide rooms, improving water supply, addressing inefficient electricity supply; and
- demarcate a new 4x4 eco-trail, including at least one unserviced bush camp.

Initial feedback by the operator and SANParks indicated a reluctance to implement option one due to physical constraints such as the availability of water, as well as concerns about the viability

of providing additional rooms for the current target market at this location, especially in light of the proposed Southern Auob Lodge outlined in section 3.4. Given this reluctance, it is recommended that option two be the priority intervention.

Access

Access to this concession will continue to be via a 4x4 track leading from the main Auob River road. However, with demarcation of the proposed new 4x4 route, an alternative access may be considered.

Activities

Activities in the concession area will continue to be concessionaire-conducted and include:

- day and night drives in the concession area using SANParks-compliant game-viewing vehicles;
- day drives on public roads outside the concession area using SANParks-compliant game-viewing vehicles;
- guided walks in the concession area, and possibly in the commercial preference zone and / or the !Khomani San portion of the !Ae!hai Kalahari Heritage Park, subject to prior agreement with the community and SANParks;
- cultural performances and interactions involving the !Khomani San; and
- guided self-drive 4x4 eco-trail along a designated route.

Environmental considerations

The concession agreement contains a requirement for an annual environmental audit. This must be rigorously implemented and monitored by the JMB. Issues for consideration at this site include shifting dunes affecting building location and method, and a lack of potable water (desalination plant currently used to address this issue). Also, sewage treatment and disposal facilities will need to be expanded.

Implementation method

It is recommended that implementation be via the following method:

- all new developments and activities to be financed and implemented by the operator (i.e. TPD) via a build, operate, transfer concession approach; and
- the existing management agreement with TPD should be amended to allow the indicated developments and activities to take place.

Financial indicators

The capital cost and financial returns of the suggested expansion, improvements, and 4x4 eco-trail will depend on the style and markets defined by the !Xaus operator – and have therefore not been modelled. It is however clear that the suggested improvements will boost the viability of the !Xaus business by expanding its revenue earning potential and improving its economy of scale. This will also improve the concession fees payable by the operator and increase number of jobs available to members of the community.

The amendment of this concession is therefore rated as **financially viable** and **economically desirable**.

Priority

Given this is an existing concession that requires limited intervention to boost performance and project benefits, a **high priority** rating has been given.

Required interventions

The following actions are required before this concession can be amended:

- Reach agreement with the existing operator, SANParks, !Khomani San and Mier communities regarding the indicated developments and implementation method.
- Conduct a detailed feasibility assessment, including an environmental scoping. During this process identify the location of a satellite camp, and the exact route for the 4x4 eco-trail and bush camp, and also consider possible amendments to the existing concession area.
- Based on the feasibility study a project proposal should be prepared outlining the exact developments, financial implications, potential benefits to all parties, and timeline for implementation.
- Preparation and signature of the required contract amendment.

3.4 Southern Auob Concession

Location & description

The proposed **Southern Auob Concession** lies in the ǀKhomani San Commercial Preference Zone (V-Zone) along the western fringe of the Auob (including the river valley), roughly between Houmoed and Bobbejaanskop in the north and Samevloeïing in the south. North of Samevloeïing a section of the main road has been diverted out of the river valley. If feasible, this diversion may be extended further north (and possibly west) to establish a viable concession area along the vacated stretch of river. The Auob River forms the concession's eastern boundary; its western, southern and northern boundaries should be defined during the scoping exercise referred to below.

An alternative location for the concession is the wedge of land between the Auob and Nossob Rivers north of Samevloeïing and south of the Houmoed to Leeuwdril link road. This option falls outside the V-Zone but it has been earmarked for development in various planning documents in the past (including the draft KTP TDF), and could be developed as a ǀKhomani San concession under an agreement with SANParks.

In summary and subject to further site level assessments and agreement with SANParks, the areas that could be used by this concession include:

- Option 1: The area between the west bank of the Auob River and the existing road diversion north of Samevloeïing; or
- Option 2: The area between the west bank of the Auob River and the park road, but with an extended diversion to a point between Houmoed and Bobbejaanskop in the north; or
- Option 3: The area between the Auob and Nossob Rivers north of Samevloeïing and south of the Houmoed to Leeuwdril link road.

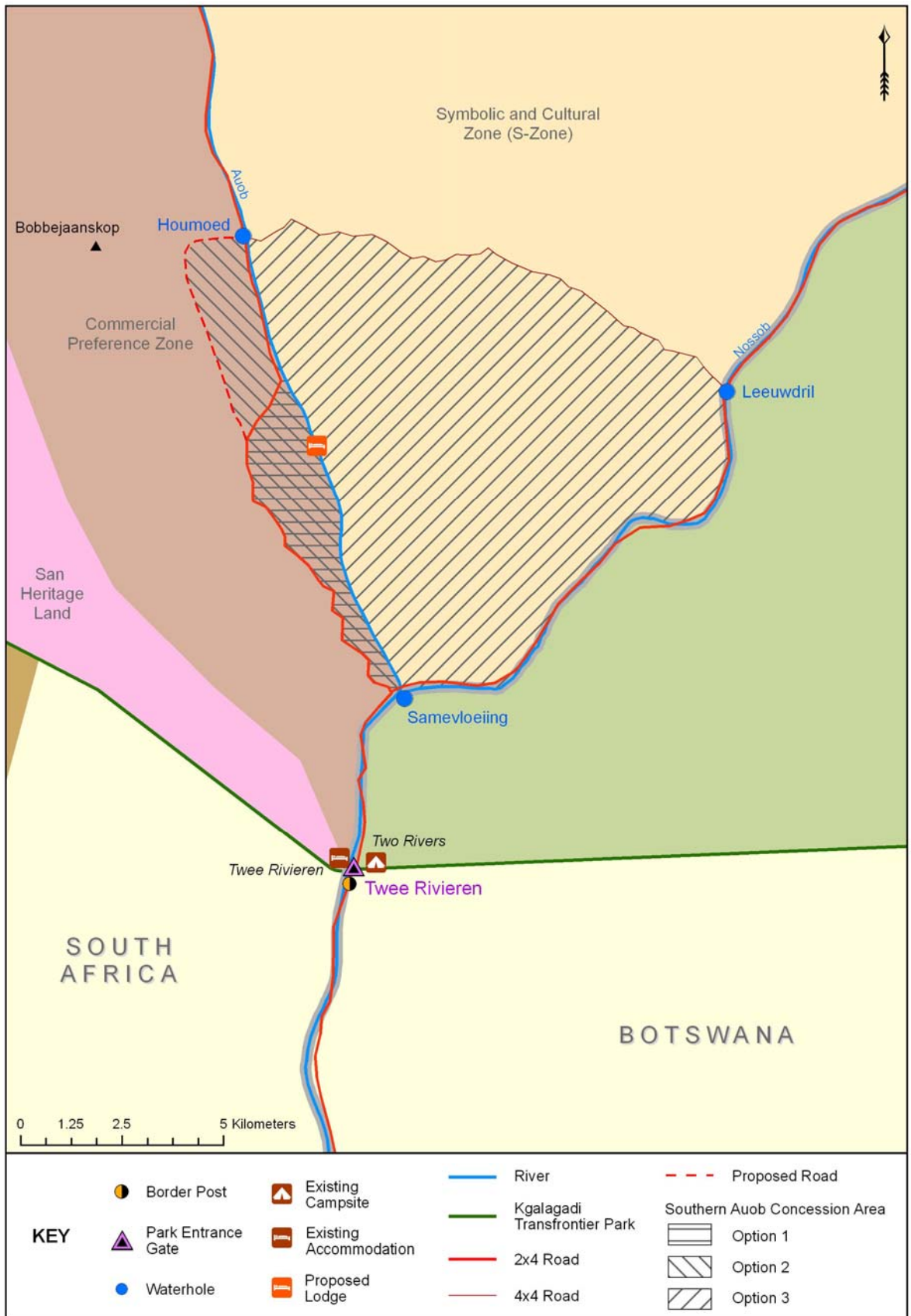
Refer to **Map 8** for an illustration of the above options.

Rationale

The rationale for this concession rests on:

- the draft TDF for the KTP proposes a new low density "San community concession" north of Samevloeïing.
- the high quality of the proposed area's resource base, including a mix of river valley and dune veld;
- the possibility of offering exclusive use-rights to a section of the Auob valley (due to the diversion of the main road away from the river course);
- proximity to the southern gateway and infrastructure hub at Twee Rivieren, where there is, amongst other things, fuel, visitor services (including an information centre), grid electricity and an airstrip;
- synergies with the proposed ǀKhomani San Heritage Centre at the southern gateway to the KTP; and
- the known interest of an established regional operator in a high-value concession that draws on the brand value of the KTP and expands the operator's regional product offering.

Map 8: Possible location of the Southern Auob Concession.



Attractions

The concession's main attractions are:

- wildlife, including the signature species of the southern Kalahari;
- scenic landscapes including the Auob valley and the dune veld to the west; and
- the cultural heritage of the !Khomani San.

Preferred markets

The concession is aimed at the top end of the ecotourism market in the form of:

- small fly-in groups on single or multi-destination circuits;
- small tour operator-conducted groups on regional itineraries; and
- occasional high-income FIT groups on regional itineraries.

Zoning

This proposed concession falls on the southern side of the Auob corridor, which has been demarcated as a "low sensitivity zone" in the Draft Joint Zoning Plan (Beyond Horizons Consulting & PPF, 2006).

In terms of the tourism zoning, the Draft Joint Zoning Plan designates this area for "medium-density motorised access". Furthermore the TDF (V&L Landscape Architects, 2006) zones the area as part of the "Primary Tourism Experience Zone." No amendment to the draft zoning is required for this concession to be further developed. A zoning summary for this concession is outlined in **Table 21**.

Table 21: Zoning summary – Southern Auob Concession.

Environmental sensitivity zoning:	KTP Joint Zoning Plan:	SANParks equivalent:
Low sensitivity	Medium density motorised (Zone 3a)	Low intensity leisure

Indicated developments

Given the preferred market segments, the quality of the offering and the sensitivity of the area, the following developments are recommended:

- a light-footprint, upmarket lodge of between 20 and 50 beds; and
- light support infrastructure including service facilities, staff housing and a limited network of game viewing tracks.

Access

The proposed concession will have high quality road access via the southern gateway to the KTP and air access via the paved airstrip south of Twee Rivieren.

Activities

The concessionaire will be permitted to offer the following activities:

- day and night drives in the concession area using SANParks-compliant game-viewing vehicles;
- day drives on public roads outside the concession area using SANParks-compliant game-viewing vehicles;
- guided walks in the concession area, elsewhere in the V-Zone and, possibly, in the !Khomani San portion of the !Ae!hai Kalahari Heritage Park; and
- cultural performances and interactions involving the !Khomani San.

Environmental considerations

The following important environmental issues should be taken note of during the EIA procedure:

- In general, the lodge should be designed to have as light a footprint as possible in all respects, taking cognisance of all salient environmental features as well as making use of recent technological and design alternatives.
- Availability of water in sufficient quantity and acceptable quality to be determined by professional geo-hydrologist.
- Ideally, renewable energy sources such as solar power should be utilised and the use of generators, gas and paraffin should be limited. Energy saving devices should be incorporated in the design phase of the development.
- Solid waste must be responsibly and legally disposed of at a registered land fill site. A waste minimisation policy should be adopted and recycling is a requirement. Waste water should be separated into grey and black streams so that water can be recovered and reused. Sewage must be appropriately treated and disposed of. Water conservation must be practised at all times and water saving devices should be incorporated in the design phase, including dual flush toilets, low flow taps and shower heads, etc. Water consumption must be monitored, recorded and evaluated regularly.

Implementation method

The implementation method will depend on the outcome of the feasibility assessment referred to below and agreement between the !Khomani San and SANParks. However, it is recommended that the following principles be applied:

- The concession should be developed using a build, operate, transfer approach.
- The concession should be awarded to an appropriately qualified private partner via a competitive bidding process.
- [TENDER RULES TO BE ADVISED PENDING LEGAL ADVICE AND CLARIFICATION OF SANPARKS POLICY/APPLICABILITY OF PPP RULES]²

² According to Hathorn (*pers. comm.*, 2010), the !Khomani San CPA is not a government institution as defined in regulation 16 of the Public Finance Management Act (No. 1 of 1999) thus any project of the !Khomani San in the V- Zone would not qualify as a public-private partnership. Conversely, any project of SANParks in the V- Zone would, if private parties were to be involved. More recently, SANParks have expressed a contrary opinion, arguing that PPP regulations did indeed apply but that implementation could proceed rapidly due to the good working relationship between Treasury and SANParks.

Financial and economic indicators

A base scenario financial model suggests:

- an initial investment of approximately R35-million;
- annual turnover at maturity of R25-million;
- pre-tax net income of R4,7-million;
- a pre-tax, ungeared IRR of around 18%;
- 72 full-time jobs with an annual wage bill of approximately R3,7-million; and
- an annual concession fee of approximately R2-million (at 8% of turnover).

The concession is rated as **financially viable** and **economically desirable provided a high quality ecotourism firm with established credentials and international marketing reach operates it. In the absence of such an operator, the project is not considered viable.**

Priority

Given its high financial and economic potential, the proposed concession has a **very high priority** rating.

Required interventions

The following actions are required before the concession can be implemented:

- a rapid feasibility assessment (including an environmental scoping to confirm the suitability of different site options) to confirm investor/operator interest and define details such as concession size, boundaries, duration, visitor limits and infrastructure requirements (including the possibility of further rerouting of the main tourist road);
- agreement between the †Khomani San and SANParks regarding the details of the proposed concession and investor procurement process;
- integration of the proposed concession into the management frameworks of the KTP;
- the preparation and formal approval of detailed concession documents (including RFPs and draft contracts); and
- implementation of the agreed procurement process to identify and contract an appropriate private investor and operator.

3.5 !Khomani San 4x4 Route & Bush Camp Concession

Location & description

This is a proposed new guided activity concession situated in the !Khomani San portion of the Ae!Hai Kalahari Heritage Park and the !Khomani San Commercial Preference Zone (V-Zone). The precise location of this route still needs to be determined, but it is suggested that it starts at Twee Rivieren or Mata Mata Rest Camp and links points of interest in the dune fields and Auob River between these two camps (see **Map 9**). At least two bush camps should be demarcated along the route (at sites still to be identified) with limited or no fixed infrastructure initially. The concession should include the option to develop ultra-light footprint wilderness camps in future, subject to agreement with SANParks. The involvement of trained !Khomani San tour guides would add value to this concession by creating opportunities for cultural activities along the route or at camps.

Rationale

The rationale for this concession rests on:

- the known demand amongst 4x4 enthusiasts for guided self-drive opportunities into remote areas, especially areas in national parks not open to the general public;
- the known interest of regional lodge operators in such a product; and
- the opportunity to connect with other 4x4 trails in the KTP, possibly via a link with the Nossob 4x4 Eco-trail or the Gemsbok Wilderness Trail.

Attractions

The concession's main attractions are:

- access to an area of the KTP not otherwise open to the public;
- the opportunity for a "wilderness" experience;
- scenic landscapes including the dune veld and pans to the west of the Auob;
- the cultural heritage of the !Khomani San; and
- desert-adapted wildlife.

Preferred markets

This product targets mainly South African (and other SADC) 4x4 enthusiasts.

Map 9: Location of the 4x4 Route & Bush Camp Concession.



Zoning

This proposed concession falls on the southern side of the Auob corridor, which has been demarcated as a “low sensitivity zone” in the Draft Joint Zoning Plan (Beyond Horizons Consulting & PPF, 2006).

In terms of the tourism zoning, the Draft Joint Zoning Plan designates this area for “no visitor access”; however the TDF (V&L Landscape Architects, 2006) zones the area as part of the “Primary Tourism Experience Zone” and also demarcates it for “medium-impact / medium-value”. It is therefore recommended that a minor amendment to the Joint Zoning Plan be made to allow this concession to be developed.

The proposed concession is also likely to make use of the “low-impact zone”, as designated within the !Ae!Hai Heritage Park Management Plan (Odendaal, 2009). According to the plan, activities with a low impact on the natural environment are encouraged in this zone, as well as developments of a soft and reversible nature. New track development is possible with permission from the JMB, however off-road driving is not permitted.

A zoning summary for this concession is outlined in **Table 22**.

Table 22: Zoning summary – !Khomani San 4x4 Route & Bush Camp Concession.

Environmental sensitivity zoning:	KTP Joint Zoning Plan:	SANParks equivalent:	!Ae!Hai Heritage Park Management Plan
Low sensitivity	Very low density motorised (Zone 2a)	Primitive	Low-impact zone

Indicated developments

This concession requires that the following developments be allowed:

- Demarcation of a new 4x4 eco-trail, including sites for at least two unserviced bush camps.

Activities

- Guided multi-day 4x4 touring;
- Primitive bush camping; and
- Short interpretive walks and other cultural activities led by a trained local guide.

Environmental considerations

The following important environmental issues should be taken note of during the EIA procedure:

- as far as possible, existing 2-spoor tracks should be used because it is policy is to minimise new tracks in the !Khomani San portion of the KTP;
- all water to be carried by participants;
- all waste to be removed and disposed of at formal disposal sites;

- no off-track driving permitted;
- overnight stops only at designated sites; and
- portable toilets to be used.

Implementation method

The implementation method will depend on the outcome of the feasibility assessment referred to below and agreement between the !Khomani San and SANParks. However, it is recommended that the following principles be applied:

- The concession should be awarded to an appropriately qualified private partner via a competitive bidding process.
- [TENDER RULES TO BE ADVISED PENDING LEGAL ADVICE AND CLARIFICATION OF SANPARKS POLICY]³

Financial indicators

A base scenario financial model suggests:

- an initial investment of approximately R600,000;
- annual turnover at maturity of R2m;
- breakeven at maturity with little prospect sustained profitability;
- 5 full-time jobs with an annual wage bill of approximately R180,000;
- an annual concession fee of approximately R140,000 (at 6% of turnover).

The concession is therefore rated as **financially marginal** and **economically unattractive**. However, if it were linked to an existing operation (such as a lodge inside or outside the KTP), it would benefit from an economy of scale that might improve its attractiveness as a commercial opportunity.

Priority

Given its low financial and economic potential, the proposed concession has a **low priority** rating.

Required interventions

The following actions are required before the concession can be implemented:

- a rapid feasibility assessment (including an environmental scoping) to confirm investor/operator interest and define details such as the exact route and location of bush camps;
- agreement between the !Khomani San and SANParks regarding the details of the proposed concession and investor procurement process;

³ Refer to comments by Hathorn (*pers. comm.*, 2010) outlined in footnote 2.

- integration of the proposed concession into the management frameworks of the KTP;
- the preparation and formal approval of detailed concession documents (including RFPs and draft contracts); and
- implementation of the agreed procurement process to identify and contract an appropriate private investor and operator.

3.6 Cultural Activities at Resorts & Camps

Location & description

This proposal is for a series of cultural activities to be designed and made available at designated resorts and camps in the KTP. Given the scale of operation required to make such activities feasible, it is recommended that they (at least initially) be conducted at the larger rest camps such as Twee Rivieren, Nossob and Mata Mata.

Rationale

The rationale for these activities rests on:

- demand for high quality, authentic cultural activities, particularly by the growing international market; and
- the need to integrate the area's cultural heritage into the KTP, which according to research undertaken (Saayman et al, 2008) is viewed primarily as a wildlife and wilderness destination.

Attractions

The main attractions that these activities will focus on include:

- the cultural heritage of the !Khomani San; and
- unique desert ecology of the southern Kalahari.

Preferred markets

Such products will mainly target the following markets:

- international FIT groups on regional itineraries;
- small tour operator-conducted international groups on regional itineraries; and
- discerning local and regional FIT groups.

Activities

The types of activities that would attract the aforementioned markets include:

- wildlife tracking;
- desert interpretation;
- traditional dance, story-telling and performance;
- hunting demonstrations and general bush craft; and
- craft production and sale.

Implementation method

The implementation method will depend on the outcome of the feasibility assessment referred to below and agreement between the ‡Khomani San and SANParks or private concessionaires. However, it is recommended that the following principles be applied:

- The right to conduct these activities inside the KTP should be awarded on a service contract basis to suitably qualified individuals or groups from the ‡Khomani San community.
- [TENDER RULES TO BE ADVISED PENDING LEGAL ADVICE AND CLARIFICATION OF SANPARKS POLICY]⁴

Priority

Although this proposal will need considerable support to build the level of capacity required in the ‡Khomani San community, it has great potential to empower local people, attract new markets to the KTP, and retain visitors for longer. Furthermore, such activities are important to transform the image of KTP from being primarily a wilderness and wildlife destination to one that also encompasses the area's heritage attractions. Therefore, this proposal has a **medium priority** rating.

Required interventions

The follow actions are required before this proposal can be implemented:

- a rapid feasibility assessment to confirm interest in the community as well as likely visitor uptake of activities. The assessment also needs to investigate most suitable locations, training needs in the community, marketing requirements, suitable business models and contracting arrangements between the community and SANParks;
- implementation of a training and entrepreneurial development programme within the ‡Khomani San community; and
- implementation of contracting between individuals or groups from the ‡Khomani San community and SANParks.

⁴ Refer to comments by Hathorn (*pers. comm.*, 2010) outlined in footnote 2.

3.7 Wilderness Leadership Trails Concession

Location & description

This is an existing operation run by the Wilderness Leadership School (WLS) inside the Ae!Hai Kalahari Heritage Park. The concession is currently operated under a verbal agreement with the ‡Khomani San community, and offers guided wilderness trails and overnight camping inside the Park, mainly to South African leaders and communities (70% local and 30% overseas) (Gordon, *pers comm.*, 2009). WLS has not developed its own accommodation facilities in the park, but rather makes use of the community's cultural camps at Imbewu and Sebobugas, and on some occasions the !Xaus Lodge (refer to Map 10). Contract Park entry fees are paid to the ‡Khomani San community when they enter the ‡Khomani San community gate, as are overnight camping fees. Where access is via Twee Rivieren, park entry fees are paid directly to SANParks (a legal requirement of entering KTP via Twee Rivieren)⁵.

Rationale

The rationale for this concession includes:

- this is an existing product that makes use of a part of the KTP that is currently under-utilised by visitors;
- the guided trails offer a very low impact activity that still has potential to generate employment and revenue for the community;
- the concession provides a unique training platform for local guides to gain experience in the tourism industry;
- the concession contributes towards the broader goals of the community and SANParks in terms of environmental education; and
- it diversifies the current KTP visitor markets.

Attractions

The attractions in this concession include:

- the opportunity for a "wilderness" experience;
- scenic landscapes including the dune veldt to the south of the Auob River;
- the cultural heritage of the ‡Khomani San, including the opportunity to be guided by them on their traditional land; and
- unique desert ecology of the southern Kalahari.

⁵ A new 4x4 track was recently developed between Imbewu and Sebobugas. This enables the linkage of the community's private gate with Imbewu, Sebobugas and also !Xaus Lodge. This improvement means that access to Sebobugas and beyond is no longer required via Twee Rivieren.

Map 10: Location of tracks and campsites sites used by the Wilderness Leadership School Trails Concession.



Preferred markets

The market segments preferred by WLS include:

- leaders from South African business corporations;
- members of traditional communities in South Africa;
- south African and international school learners; and
- south African and international trekking enthusiasts.

Zoning

This concession falls on the southern side of the Auob corridor, which has been demarcated as a “low sensitivity zone” in the Draft Joint Zoning Plan (Beyond Horizons Consulting & PPF, 2006).

In terms of the tourism zoning, the Draft Joint Zoning Plan designates this area for “no visitor access”, however this document also illustrates a “special management overlay” that provides community use. Such community use may include resource harvesting, access to sacred sites, and commercial tourism activities by the community (or in partnership with an operator).

According to the !Ae!Hai Heritage Park Management Plan (Odendaal, 2009), the area designated for this concession lies within a “low-impact zone”. The plan states that activities with a low impact on the natural environment are encouraged in this zone, as well as developments of a soft and reversible nature.

The current KTP and !Ae!Hai Heritage Park zoning plans are therefore compatible with this proposed concession and no amendments are required for this concession to be implemented. A zoning summary for this concession is outlined in **Table 23**.

Table 23: Zoning summary – Wilderness Leadership Trails Concession.

Environmental sensitivity zoning:	KTP Joint Zoning Plan:	SANParks equivalent:	!Ae!Hai Heritage Park Management Plan
Low sensitivity	Very low density pedestrian (Zone 1b)	Remote	Low-impact zone

Indicated developments

Given this is a wilderness trails activity concession, very limited development is required and the concessionaire can continue to make use of existing facilities in the heritage park. This activity requires a degree of exclusivity during the trails; however this can be catered for using temporal zoning and encouraging guides to avoid vehicle tracks where traffic might be encountered.

WLS (Gordon, *pers comm.*, 2009) has indicated the need for an alternative vehicle access route to enable entry to the trekking area around Sebogugas via the community gate and Imbewu rather than via Twee Rivieren. During the drafting of this report, the authors were informed that such a track was recently developed, however it has yet to be utilised by WLS.

Activities

Activities in the concession area will be conducted by the WLS and include:

- overnight and day walks with community trackers and guides;
- wildlife tracking with desert interpretation; and
- hunting demonstrations and general bush craft.

Environmental considerations

Environmental management plans for trails activities are to be compiled and submitted to the ‡Khomani San Park Committee and JMB (see Annex D for an example of an EMP).

Implementation method

Given this is an existing concession being operated on a verbal agreement it is recommended that this agreement be confirmed in a contemporary activity concession contract between the WLS and the ‡Khomani San community.

Financial indicators

The WLS is a not-for-profit organisation and its wilderness trails in the KTP are not being conducted on a commercial basis. Nonetheless, for this activity to be sustained it requires a level of exclusivity, which in turn poses an opportunity cost on the community in terms of alternative use of their land. It is therefore recommended that WLS pay a concession fee to the ‡Khomani San community for their activities.

With very little capital investment, it is estimated that the WLS generate a turnover of around R220,000 from their activities in the Park. Approximately three permanent local jobs have been created and around R10,000 per annum is paid annually in camping and access fees to the ‡Khomani San community. It is estimated that a viable concession fee for the current operation may be about R26,400 per annum (based on around 12% of turnover).

Priority

Given this is a current activity taking place in the KTP without a written agreement it is recommended that the formalisation of this concession be given a **high priority**.

Required interventions

The following interventions are required to formalise this existing concession:

- WLS should submit a project proposal to the ‡Khomani San community. This proposal should outline its needs from the community in terms of access and trekking areas, a financial offer, and commitments in terms of empowerment of the local community;
- access regulations and other operational issues to be discussed and agreed with SANParks; and
- once the proposal has been negotiated and accepted by the community, a contemporary activity concession contract should be concluded between WLS and the ‡Khomani San community.

3.8 Heritage Centre

Location & description

This proposal is for a world-class heritage centre to be developed in close proximity to Twee Rivieren with the aim of raising awareness of the area's significant cultural heritage, particularly that of the !Khomani San.

Rationale

The rationale for this development rests on:

- the area currently lacks a sense of identity in terms of its cultural heritage and in particular the rich history of South Africa's first people - the San community;
- many of the area's cultural artefacts are being held off-site in people's homes and in various towns and cities, including Kimberly and Cape Town, where their preservation and security might be threatened;
- a process is already underway to list the broader region as a World Heritage Site (see section 5.1) on cultural grounds – one of the obligations of such status is to present the site to the public; and
- increasing demand among visitors for high quality, authentic cultural activities and accompanying information displays.

Attractions

The main attractions of the heritage centre will have include:

- high quality displays on the areas' cultural and natural heritage, including that of the !Khomani San and other local groups such as the Mier community;
- a central point where cultural activities may be offered (refer to section 3.6); and
- other visitor services and facilities, such as a craft market, gift shop and restaurant (subject to feasibility assessments).

Preferred markets

A heritage centre of this type can target a range of markets, including:

- international FIT groups on regional itineraries;
- tour operator-conducted international groups on regional itineraries;
- discerning local and regional FIT groups; and
- local and regional school learners.

Implementation method

The implementation method will depend on the outcome of the feasibility assessment referred to below. However, it is recommended that the following principles be applied:

- The centre and its information displays should be of world-class standard worthy of the area's future status as a World Heritage Site.
- Capital development costs will require substantial input from the donor community and / or Government.
- The centre should be professionally operated and maintained, possibly in partnership with institutions such as the McGregor Museum in Kimberly and the Wits Origins Centre. Specialised storage and archiving facilities will be required for preserving some of the materials that are to be returned to the community. It is also possible that other collections of artwork and artefacts that are owned by certain members of the community may best be archived and displayed here.

Priority

Given the need to transform the image of KTP from being primarily a wilderness and wildlife destination to one that also encompasses its rich cultural heritage, and coupled with the fact that the area is being proposed for World Heritage listing, it is recommended that this intervention be given a **very high priority** rating.

Required interventions

The follow actions are required before this proposal can be implemented:

- Formation of a task force comprising key local, provincial and national role-players to discuss the proposed project and prepare an implementation plan.
- Formation of a heritage committee within the !Khomani San community to participate in the World Heritage listing process, as well as the planning of the heritage centre.
- Implementation of a rapid feasibility study to assess the viability of developing a heritage centre for the region in the vicinity of Twee Rivieren. This study should also make recommendations regarding potential sites, general content, conceptual design and sustainable funding, development options and operating models.
- Identification of a project champion – both an institution and an individual.

4. !Khomani San Farms

4.1 Overview

Location

Under the 1999 land claim settlement approximately 34,728ha of Kalahari farmland was initially given back to the !Khomani San community. Following further negotiations in 2007 another 6,020ha was earmarked for transfer to the !Khomani San CPA; however the allocation of title to this additional land has not yet been completed. Once all the farmland is finally transferred the community will have title to a total of eight properties totalling 40,748ha, being Sonderwater, Rolletjies, Erin, Witdraai, Uitkoms, Andriesvale, Miershoop Pan and Scotty's Fort (refer to **Map 11**).

Two of these farms (i.e. Sonderwater, Rolletjies) are situated directly adjacent to the southern boundary of KTP, while the other six are located approximately 50km south of KTP in the Andriesvale area. A park entry gate has been developed opposite Sonderwater to provide access for the !Khomani San community to their land in the KTP.

Through the settlement agreements and management planning processes, the !Khomani San community has designated specific purposes to the different land units. These are listed below:

- **Sonderwater** (3,037ha) & **Rolletjies** (2,983ha) – have been zoned as a traditional conservation area to be developed and managed for cultural, traditional and ecotourism purposes;
- **Erin** (6,392ha) – is zoned for development as a model Kalahari game farm to be used primarily for commercial trophy and biltong hunting, but possibly also for ecotourism;
- **Witdraai** (3,345ha) – is zoned as a model Kalahari farm to be developed and managed for the benefit of community members wishing to retain historic traditions and culture or pursue a traditional lifestyle, as well as benefit from ecotourism initiatives on the farm, with access to basic services and education;
- **Uitkoms** (5,270ha), **Scotty's Fort** (4,637ha) and **Andriesvale** (5,203ha) – are zoned as livestock farms where members of the !Khomani San community can practice subsistence and small-scale commercial livestock farming on a sustainable basis; and
- **Miershooppaan** (9,881ha) – is zoned as a mixed livestock and game farm where members of the !Khomani San community can practice subsistence and small scale commercial livestock and game farming on a sustainable basis, with biltong hunting as a further land use option.

This plan focuses primarily on the farmland that the community has zoned for different tourism uses including hunting, thus being Sonderwater, Rolletjies, Erin, Witdraai and Miershooppaan.

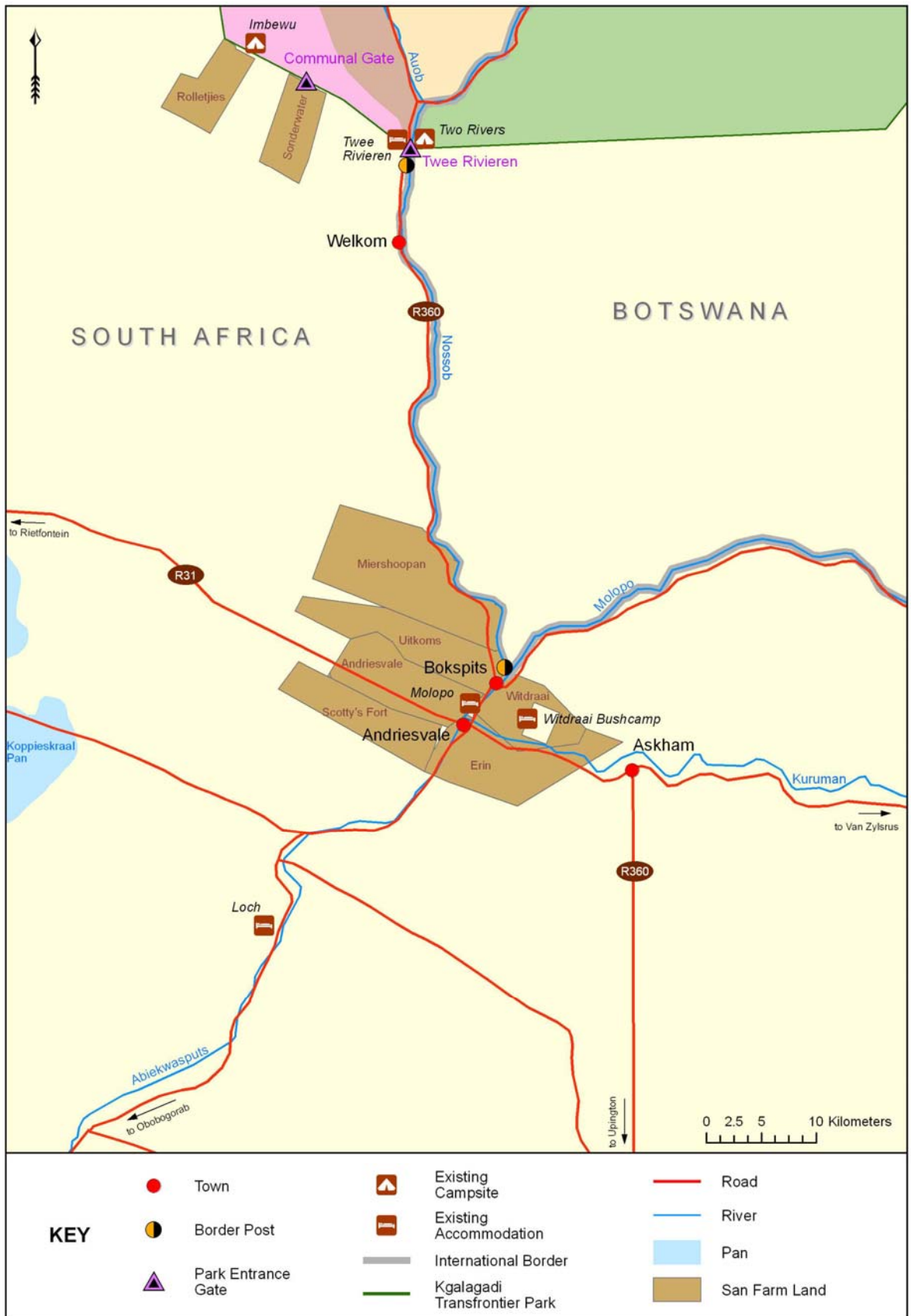
Access

The access possibilities for the farms are summarised in **Table 24** below.

Table 24: Access to the !Khomani San Farms.

Access by vehicles	Access by aircraft
<ul style="list-style-type: none"> • Vehicle access to the farms is possible from both the R360 and R31 roads • All internal roads and tracks require 4x4 vehicles to enable year round access 	<ul style="list-style-type: none"> • No access other than via the airstrip at Twee Rivieren

Map 11: Location of the !Khomani San Farms.



Historical & social context

As mentioned in section 2.2, 1995 saw the !Khomani San community lodge a claim for the restitution of land inside what was then called the Kalahari Gemsbok Park. After years of negotiation and verification the claim was finally settled on 21st March 1999, with the official transfer of title to six Kalahari farms to the !Khomani San CPA. After further negotiations, on 29th May 2002 the conditional allocation of land within the Park was also committed to the ownership and use of the !Khomani San and Mier communities through what is known as the !Ae!Hai Kalahari Heritage Park Agreement (Chennells, *pers. comm.*, 2010).

As already explained in section 2.2, the !Khomani San CPA that was established to receive title and manage the farm land and the community's rights inside the Park collapsed as an institution, largely because of lacking post-restitution support. In the absence of this support, some of the farms were plundered of their resources (including wildlife and support infrastructure such as houses, fences etc). Three successive CPA committees were elected and subsequently dismissed due to mismanagement. Furthermore, robust institutional and land management systems were never put in place. As a result the community remained destitute, experiencing high levels of poverty, unemployment, and substance abuse.

The CPA is currently not formally operational, pending an initiative to revive it in a sustainable manner, and currently developments in the community are coordinated by means of monthly meetings attended by all constituencies and role players. During this revival period the Park and Traditional Ward Committees are formally mandated by the Department of Rural Development and Land Reform as the institutions responsible for development and conservation activities in the Park and on the farm land.

A number of Non-Government Organisations (NGOs) and individuals have attempted to assist the !Khomani San CPA, and the South African San Institute (SASI) has supported the community since the inception of the land claim. More recently the ASLF has become involved and facilitated the acquisition of grants from the Ford Foundation, Finnish Embassy, CIDA and the National Lottery, which are being used to provide support in the fields of advocacy, institutional development, land use planning and management, tourism planning and community development. Activities are also being carried out to help re-build the community's cultural identity by re-establishing its connection with ancestral land and facilitating the transmission of indigenous knowledge between generations.

Through formation of the "Boesmanraad" (Park & Traditional Ward Committees), the community is now co-managing their land in the Park (together with SANParks) as well as their farmland. Furthermore, through these representative bodies the community wants to develop commercial ecotourism on their land with a view to create employment and generate cash to sustain land management and community development.

Environmental context

Given the farms are not inside any protected area a much less rigorous environmental assessment procedure is required prior to any tourism development. As such, the need for an EIA would be determined by the type and scale of development contemplated. This requirement would be triggered by the intended transformation or removal of indigenous vegetation of three hectares or more or of any size where the transformation or removal would occur within a critically endangered or an endangered ecosystem listed in terms of section 52 of the National

Environmental Management: Biodiversity Act, 2004 (Act No.10 of 2004), or the transformation of undeveloped, vacant or derelict land to (a) establish infill development covering an area of five hectares or more, but less than 20 hectares; or (b) residential, mixed, retail, commercial, industrial or institutional use where such development does not constitute infill and where the total area to be transformed is bigger than one hectare.

In any event, the ǀKhomani San Ward Committee for Erin and Witdraai require an environmental management plan for the planning, construction, operational and decommissioning phases, as well as an annual compliance audit to be conducted by the concessionaire together with the Ward Committee. An example of an EMP is presented in Annex D. In all instances, a professional report on water use sustainability is required during the conceptual planning phase.

Tourism resources

The ǀKhomani San community farms are characterised by the Kalahari Desert landscapes consisting of rolling red dune fields, ephemeral river beds, pan systems, open grasslands, and acacia woodlands. Historically these properties were used primarily for small stock farming, although some large stock and wildlife farming also took place. As such, the infrastructure customarily needed for supporting tourism is not present on the farms. Furthermore, misuse of the farms during an unruly initial period under the custodianship of various ǀKhomani San CPA management committees saw many of the farms plundered of their wildlife and other potential tourism resources such as old farm houses.

Existing markets & products

Accommodation

There is currently only one functioning accommodation facility on the ǀKhomani San community farm land. This is summarised in **Table 25** below.

Table 25: Existing accommodation and markets on the farmland.

Product	Location	Type, size, performance	Markets
Witdraai Bush Camp	<ul style="list-style-type: none"> Eastern Witdraai, with guided walks offered from the reception close to the entrance of Molopo Lodge Operated by the South African San Institute (SASI) 	<ul style="list-style-type: none"> Traditional accommodation with campsite 4 traditional huts with 10 beds, and 4 campsites Achieved about 4% occupancy in 2008 (150 bednights and 50 camping nights sold) 	<ul style="list-style-type: none"> 15% South African; 5% SADC; 80% Overseas 20% FIT (own vehicle); 70% FIT (hired vehicle); 10% Tour operator

Activities

A range of cultural activities are on offer at the SASI-run Witdraai Bush Camp and SASI's office opposite the Molopo Lodge entrance. Furthermore, Molopo Lodge conducts day and half day activities on the farm land, in agreement with the ǀKhomani San community. Unfortunately limited information is available on the performance of these or the SASI activities, although verbal reports indicate very weak interest from visitors, which is further exacerbated by a lack of marketing and signage.

Craft development & sale

With support from SASI, the !Khomani San are involved with two craft initiatives: **Sisen Craft**, which is a traditional handicraft project; and **Home&Textile**, a project that designs and produces embroidered clothing and household accessories. According to SASI, products developed by these projects are being retailed to the public through an outlet in Andriesvale, as well as wholesaled to retailers based in Cape Town, Namibia and Europe.

The craft programme is run by a committee established in the community by SASI. 40% of proceeds from the sale of craft are retained by the craft committee to pay overheads, including the cost of materials, while 60% is paid to the individual craft makers. SASI provides advice to the committee and craft makers in the fields of institutional / business structuring, product design / development, sourcing materials, quality control, and accessing local and external markets.

SASI also assists the community to source grant money for supporting the craft projects, however it was reported that one grant from Norwegian Church Aid was recently reduced by 80%. Other support was provided by the Department of Sport, Arts and Culture, however this stopped in 2009 because the projects were not yet properly registered. According to Mierke (*pers comm.*, 2010), the lack of financial assistance has negatively affected the training provided by SASI, particularly in instructional structuring / registration and product design / development. It has also limited the supply of materials needed for the production of craft by the community.

During the field work conducted for this study from 26th July and 1st August 2009 it was observed that the community's retail outlet made use of the pre-fabricated structures of an old road construction camp, which was not aesthetically appealing or appropriate. Furthermore, the craft on sale was of varying quality and the product ranges were fairly standard and lacking diversity and innovation compared with contemporary craft outlets elsewhere in the region (e.g. The Namibia Craft Centre, Nyae Nyae Conservancy crafts). During a more recent field trip to the area between 22nd and 25th February 2010 it was observed that the craft outlet had moved to a space next to the bottle store at Molopo Lodge. While this has solved one problem in terms of location (closer to where tourists stop), activity at the bottle store often discourages potential buyers. Also, no improvement has been made in the variety, quality and presentation of crafts on sale.

Unfortunately, at the time of writing this report, insufficient information was available regarding the sale of craft in the area. Furthermore, the study team was not able to obtain financial statements from the projects to assess whether they were sustainable or profitable. It also remains unclear how many people were involved and benefited from these initiatives. Nonetheless, from observation and the limited information provided it is apparent that this programme is subsidised and produces relatively small returns to local craft makers, especially if the total cost of inputs were assessed. This raises concerns about the financial viability and sustainability of the current operation. It is therefore recommended that a thorough assessment of the programme be carried out by a craft business expert, as proposed in section 5.4.

4.2 Tourism developments & activities

The proposed new tourism developments and activities for !Khomani San community farms are summarised in **Table 26** to below, and clearly illustrated in various maps throughout the following sections.

Table 26: Proposed tourism developments & activities on the †Khomani San land.

Erin Hunting & Tourism Concession (new)	TCA Bush Camp & Cultural Activities (new)	Witdraai Bush Camp & Cultural Activities (existing)
<ul style="list-style-type: none"> • High value hunting & tourism concession • Developed and operated with a private sector partner • Specialising in traditional San hunting methods, including bow hunting • Very high priority 	<ul style="list-style-type: none"> • Rustic bush camp and associated cultural activities • Developed and operated by the local community living in the TCA, BUT under guidance and support of an established tour operator experienced in cultural tourism • Medium priority 	<ul style="list-style-type: none"> • Upgrade and possible relocation of existing operation • Developed and operated by the local community living at Witdraai, BUT under guidance and support of an established tour operator experienced in cultural tourism • Low priority
Miershooppaan hunting concession (new)	Scotty's Fort Lodge Concession (new)	
<ul style="list-style-type: none"> • Biltong hunting concession • Developed and operated with a private sector partner • High priority 	<ul style="list-style-type: none"> • In the short-term, the existing farm house may be renovated and used as guest house, possibly linked with one of the hunting concessions • In the long-term, a Roadside Lodge Concession of approximately 60 to 80 beds, including a campsite • Developed via a build operate transfer concession with a private partner • Low priority 	

4.3 Erin Hunting & Tourism Concession

Location & description

This is a proposed new concession located on the Erin farm, situated south east of Andriesvale and 60km south of the KTP, as illustrated in **Map 12** below. It is recommended that the entire Erin farm (6,392ha) be demarcated for this concession and that a private partner be identified to help develop, operate and maintain the farm as a hunting concession. While it is suggested that the area be used primarily for hunting, a lodge or tented camp may be developed for accommodating hunters and possibly photographic tourists outside of the hunting season.

Rationale

The rationale for this concession lies in the opportunity to hunt in the Kalahari Desert with !Khomani San trackers and guides, which may include modern bow hunting or, possibly, traditional weapons. It is understood from market research that this activity would have particularly high demand from the international trophy hunting market. The business plan prepared for the farm (Davies, 2009a) indicates this could be a viable venture with various spin-offs for the local economy and livelihoods. It was reported that several potential investors and developers have expressed interest in this concession, and a source for game donations has been identified.

Attractions

The main attractions of this concession include:

- the opportunity to hunt traditionally with !Khomani San trackers and guides;
- the opportunity for hunting desert-dwelling wildlife in a “wilderness” setting;
- scenic landscapes of the southern Kalahari Desert; and
- the cultural heritage of the !Khomani San.

Preferred markets

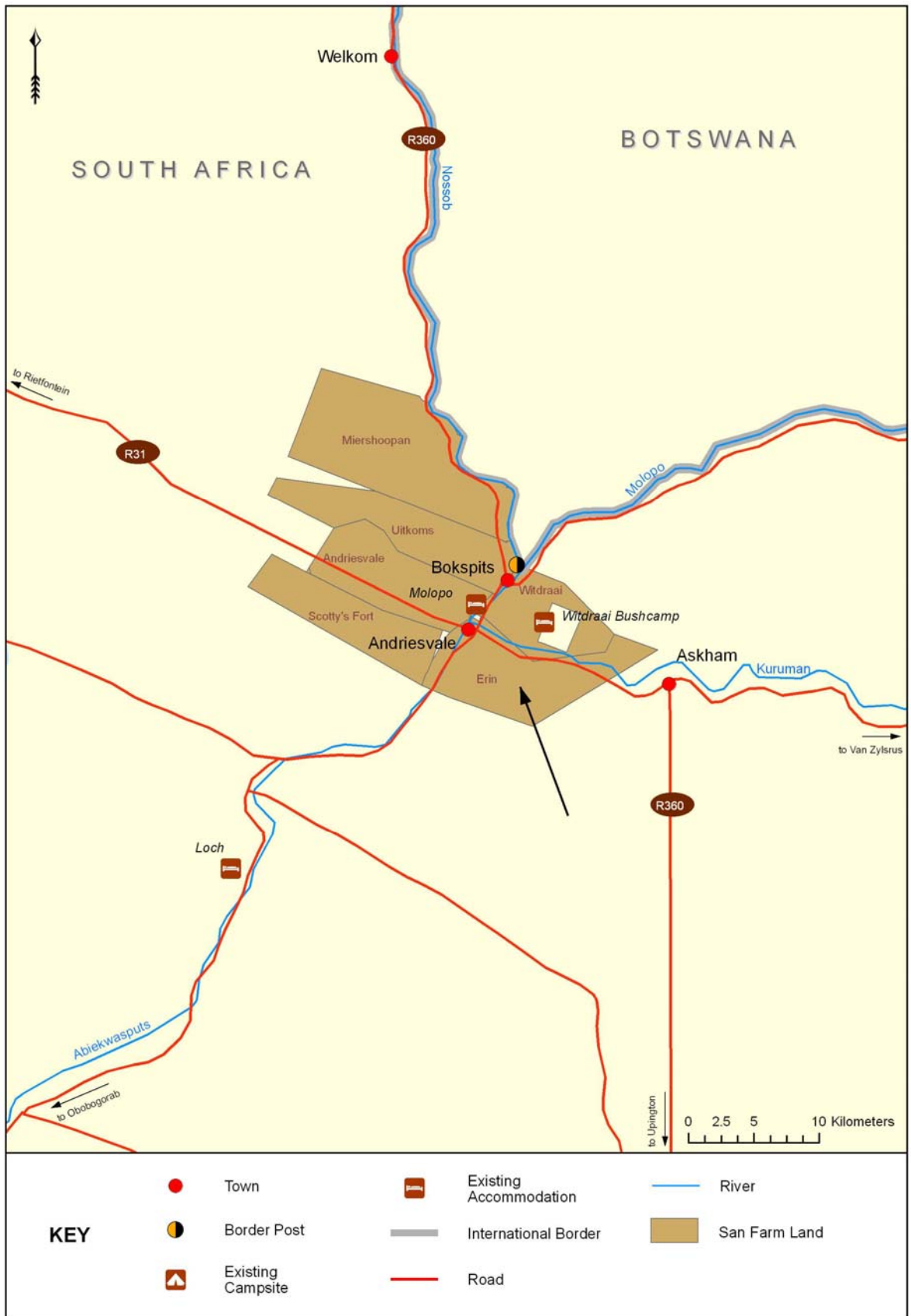
The preferred market segment for this concession is:

- trophy hunting outfitters catering for the international market, and with access to clients with special interest in bow and traditional hunting; and
- occasional biltong hunters, outside of the international trophy hunting season.

Zoning

Erin farm has been zoned by the community for development as a model Kalahari game farm and to be used primarily for commercial trophy and biltong hunting, but possibly also for ecotourism. The proposed concession is compatible with this vision, as well as the objectives and zoning outlined in the management plan for Erin farm (Witdraai & Erin Wyk Committee, Grossman & Holden, 2009).

Map 12: Location of the Erin farm.



Indicated developments

The required developments for this trophy hunting operation include:

- repair and / or upgrade current property fence to game proof standards;
- stocking of the farm with iconic Kalahari Desert species that are currently absent or occur low in numbers;
- development of one or more temporary, reversible hunting camps at sites still to be decided on;
- development of a game farm management headquarters (which could also be on Witdraai as the two farms need to be managed together); and
- possible development of a hunting lodge or tented camp for accommodating guests (while acknowledging that the international, niche market proposed here probably only demands authentic rustic accommodation such as fly camps). Any such accommodation could also be used by photographic tourists outside of the designated hunting season.

Activities

All activities should be conducted by a professional hunting outfitter and should include:

- trophy hunting using both modern and traditional methods;
- guided veldt walks with !Khomani San trackers, which could include desert interpretation and wildlife tracking; and
- other cultural activities such as traditional dance, story-telling or performance, demonstrations of general bush craft, and visits to neighbouring settlements (e.g. at Witdraai).

Environmental considerations

The following important environmental considerations should be taken note of during the EIA procedure:

- need for a water use sustainability report; and
- EIA and/or environmental management plan for planning, construction and operational phases required, concessionaire responsible (see Annex D).

Implementation method

The implementation method will depend on the outcome of the feasibility assessment referred to below. However, due to the cost and expertise required for establishing a hunting operation of this nature, it is recommended that the following principles be applied:

- the concession be implemented using a build, operate, transfer approach; and
- the concession should be awarded to an appropriately qualified private partner via a competitive bidding process.

Financial indicators

Accurate financial modelling requires more detailed assessment of the Erin property, but early indicative figures suggest:

- a substantial capital investment to upgrade the fence, develop management and tourism infrastructure and stock with wildlife;
- annual turnover at maturity of about R2,5 million;
- income before capital charges, depreciation and tax of approximately R500,000;
- 20 full-time jobs with an annual wage bill of approximately R750,000; and
- annual concession income of approximately R350,000.

The financial viability and economic desirability should be reassessed during the feasibility study referred to below. It is however clear that the concession requires an initial capital subsidy and a high quality trophy-hunting firm with established credentials and international marketing reach to operate it. **Provided a capital subsidy and appropriate operator are secured, the concession is likely to be financially viable and economically desirable.**

Priority

Given the level of interest expressed in this area by potential development and operating partners, as well as the potential for sourcing game donations from a well-established farm in the vicinity, this concession should be considered a **very high priority**.

Required interventions

The follow actions are required before the concession can be implemented:

- a rapid feasibility assessment to confirm investor/operator interest and define details such as infrastructure requirements and wildlife re-introduction volumes etc. (this should build on the earlier work of Davies (2009a);
- agreement by the !Khomani San regarding the details of the proposed concession and investor procurement process;
- integration of the proposed concession into the management and development plan for Erin farm;
- the preparation and formal approval of detailed concession documents (including RFP and draft contract); and
- implementation of the agreed procurement process to identify and contract an appropriate private investor and operator.

4.4 TCA Bush Camp & Cultural Activities

Location & description

This is a proposal for the development of a bush camp and cultural activities in the traditional conservation area (TCA). The TCA currently comprises the Sonderwater and Rolletjies farms (total of 6,020ha)⁶, located west of the R360 and directly adjacent the !Ae!Hai Kalahari Heritage Park, as illustrated in **Map 13**. The community have access to the KTP via a private gate, which is located directly opposite Sonderwater. The operation could therefore be associated or linked with the proposed 4x4 Route & Bush Camp Concession inside the KTP (see section 3.5).

Rationale

The rationale for this operation lies in the demand for authentic and accessible cultural activities by growing numbers of overseas visitors, as well as the discerning South African market.

Attractions

The attractions that this operation could offer once it is fully developed include:

- authentic, high quality cultural activities conducted by the ǀKhomani San community living in the TCA;
- a convenient location close to the main entrance of KTP;
- rustic and simple camping in a natural Kalahari desert setting, as well as the possibility of “home-stays”⁷;
- possibility of integration with 4x4 routes or wilderness trails in the KTP; and
- availability of locally produced, high quality and authentic craft that provides visitors with a reminder of their visit to the community.

Preferred markets

The preferred market segments for this operation include:

- international FITs on regional itineraries;
- tour operators with international visitors on regional itineraries; and
- discerning local and regional FITs.

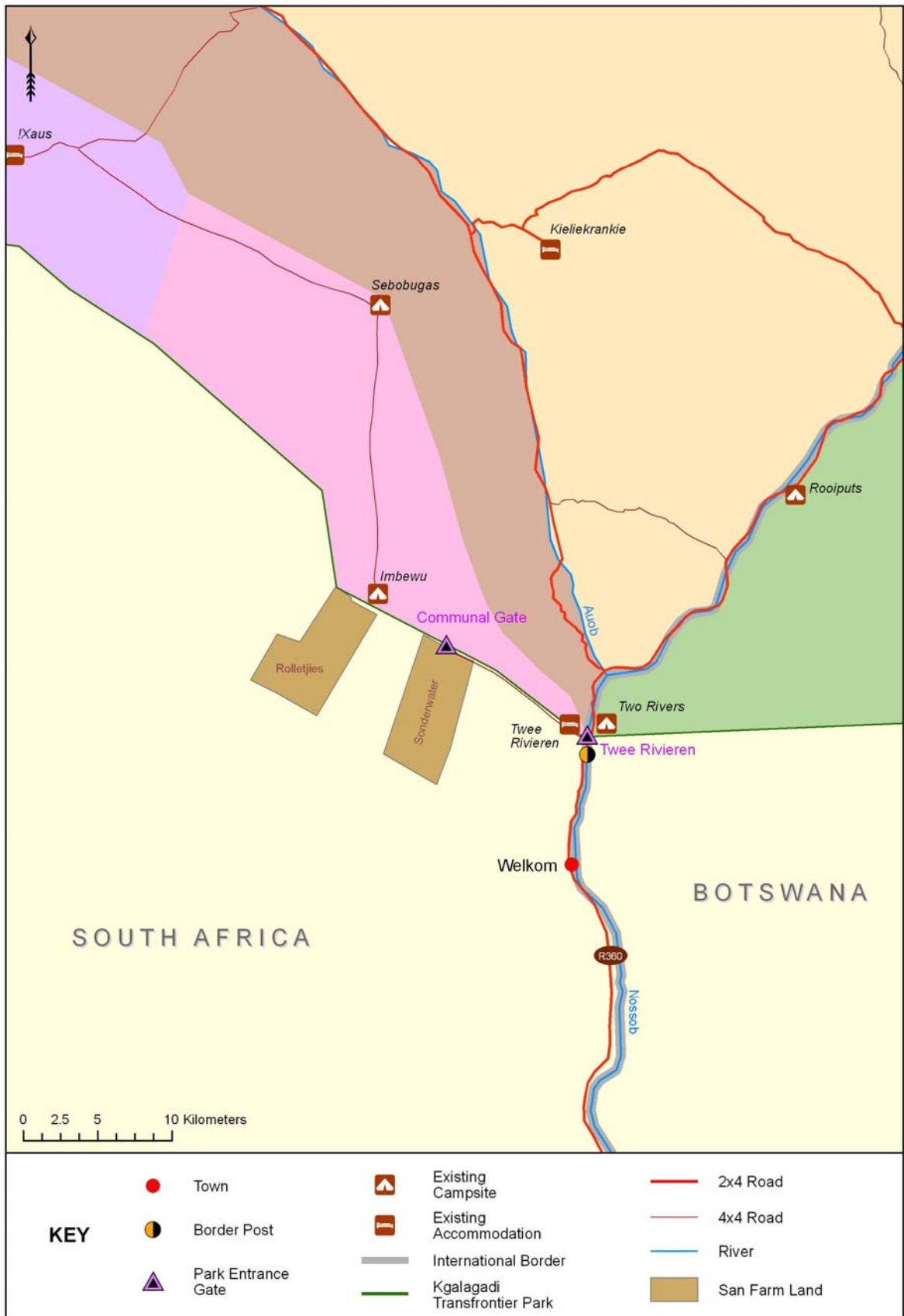
Zoning

The TCA farms have been zoned as a traditional conservation area to be developed and managed for cultural, traditional and ecotourism purposes. The proposed operation is therefore compatible with this vision, the preliminary business plan for the TCA (Davies, 2009b), and the management plan for the !Ae!Hai Kalahari Heritage Park (Odendaal, 2009).

⁶ The community also hopes to acquire the Blinkwater farm that lies between these two properties.

⁷ A homestay is a form of tourism accommodation that allows visitors to rent rooms inside the homes of local families with the aim of learning about their lifestyles and cultural practices, as well as to experience living in their environment.

Map 13: Location of the TCA.



Indicated developments

An operation of this nature requires little in the way of infrastructure development. Nonetheless, the following is recommended:

- a simple, rustic reception / welcoming point to the TCA;
- a simple camping site in a private setting for accommodating overnight visitors (no running water is necessary, provided there are basic facilities such as a properly built dry toilet and bathing area). The location of this site should be within easy walking distance of the nearest settlement;
- a site close to the camping area where traditional structures can be built for cultural performances and displays;
- an area where locally made handy crafts can be displayed and sold to visitors;
- an access road of reasonable condition; and
- although this is not entirely necessary for this proposed tourism product, the community requires headquarters for the management of these northern farms as well the contractual park. These should be planned and implemented in accordance with the respective management plans, however it is recommended that reasonable distance is maintained between the tourism operations and the park / TCA management headquarters.

Activities

This operation's activities need to be the main focus of the visitor's stay, and should be of exceptional quality and authenticity. As a minimum, the activities should include:

- demonstrations of bush craft, wildlife tracking and hunting;
- traditional dances, story-telling and other performances;
- guided bush walks, including overnight and day walks;
- traditional craft production and sale; and
- bush camping and possibly "home stays".

Environmental considerations

The following important environmental issues should be taken note of during the development of this operation:

- sustainability of water supply⁸; and
- waste management.

Implementation method

For a product of this nature to be successful, special emphasis must be placed on creating the highest quality cultural experience for visitors. This will require a great deal of support in the form

⁸ These farms are known to have very poor or no water. There is a possibility of using a borehole on the corner of the road to the KTP, however a pipeline will be needed and maintenance requirements will be significant.

of training and marketing, with help from the tourism private sector. It is therefore recommended that:

- The operation should be structured on a similar basis to the very successful Ju/'hoansi living museum operating in Namibia at Grashoek (Humphrey & Wassenaar, 2009). This operation is run by the Grashoek community, but with long-term support from the Living Culture Foundation of Namibia (LCFN)⁹, a not-for-profit organisation comprised of experienced tour operators that direct their own and other tour groups, as well as overseas FITs to the village.
- Other implementation steps are to be determined following the detailed feasibility assessment and business plan outlined below.

Financial indicators

Establishing a basic reception area and campsite will involve a capital investment of approximately R150,000. Annual turnover of some R300,000 at maturity will likely result in a net cash flow of R50,000 after tax and depreciation. The community could derive about R15,000 annually in concession fees. The business is expected to create 4 permanent on-site jobs with an annual payroll at maturity of approximately R100,000. Given its low margins, this business is rated as **financially marginal** but **moderately attractive** as a community-based product

Priority

This activity has the potential to raise the profile of ǀKhomani San culture, diversify activities in the area, and to generate income for residents in the TCA. While it is reported that an investor / funder has shown interest in supporting a tourism project in this area, the proposed initiative will require a significant level of assistance over a long period to for it to become sustainable and successful . As such, this project is given a **medium priority**.

Required interventions

The following actions are required before this operation can be implemented:

- a rapid feasibility assessment to confirm tour operator interest and define details such as infrastructure requirements, the potential for activities, and training needs;
- identification of a potential private sector mentor or partner that can provide training, support and marketing;
- agreement by the ǀKhomani San regarding the details of how the project will be implemented;
- development of a detailed business plan to guide the operation¹⁰;
- integration of the proposed operation into the management and development plan for the TCA; and
- implementation of the project and contracting of the private sector mentor.

⁹ Refer to <http://www.lcfn.info/>

¹⁰ It was reported at the time of writing that a preliminary business plan for this operation has been prepared.

4.5 Witdraai Bush Camp & Cultural Activities

Location & description

Witdraai farm (3,345ha) is located north of the R31 and east of the R360, some 60km south of the KTP, as illustrated in **Map 14**. An existing bush camp has been developed and is operated by SASI on the south eastern corner of Witdraai. SASI also operates an information and activity centre opposite the Molopo Lodge turn-off where tourism information, guided walks, health products and other activities are promoted.

The location of the SASI bush camp is far from local settlements, making cultural activities logistically difficult to arrange, and thus unreliable. Furthermore, the bush camp has been developed in a scenically unattractive area (next to a boundary fence), and comprises a jumbled collection of modern brick and semi-traditional structures. It was reported that SASI plans to hand over these operations to the !Khomani San community once their capacity has been built to the required level; however the operations currently run at extremely low occupancies and appear to be financially unviable. It was also explained to the study team that no business plan for this operation had been prepared.

This plan proposes a re-structuring and possible relocation of the current operation run by SASI, and the development of an authentic, rustic bush camp with associated cultural activities on the Witdraai farm. **However, it is unlikely that a development of this nature will be as successful here as in the TCA, which is better located in relation to the main regional attraction – KTP. Furthermore, it is doubtful that market demand for such products will make a second product feasible in the short to medium term.**

Rationale

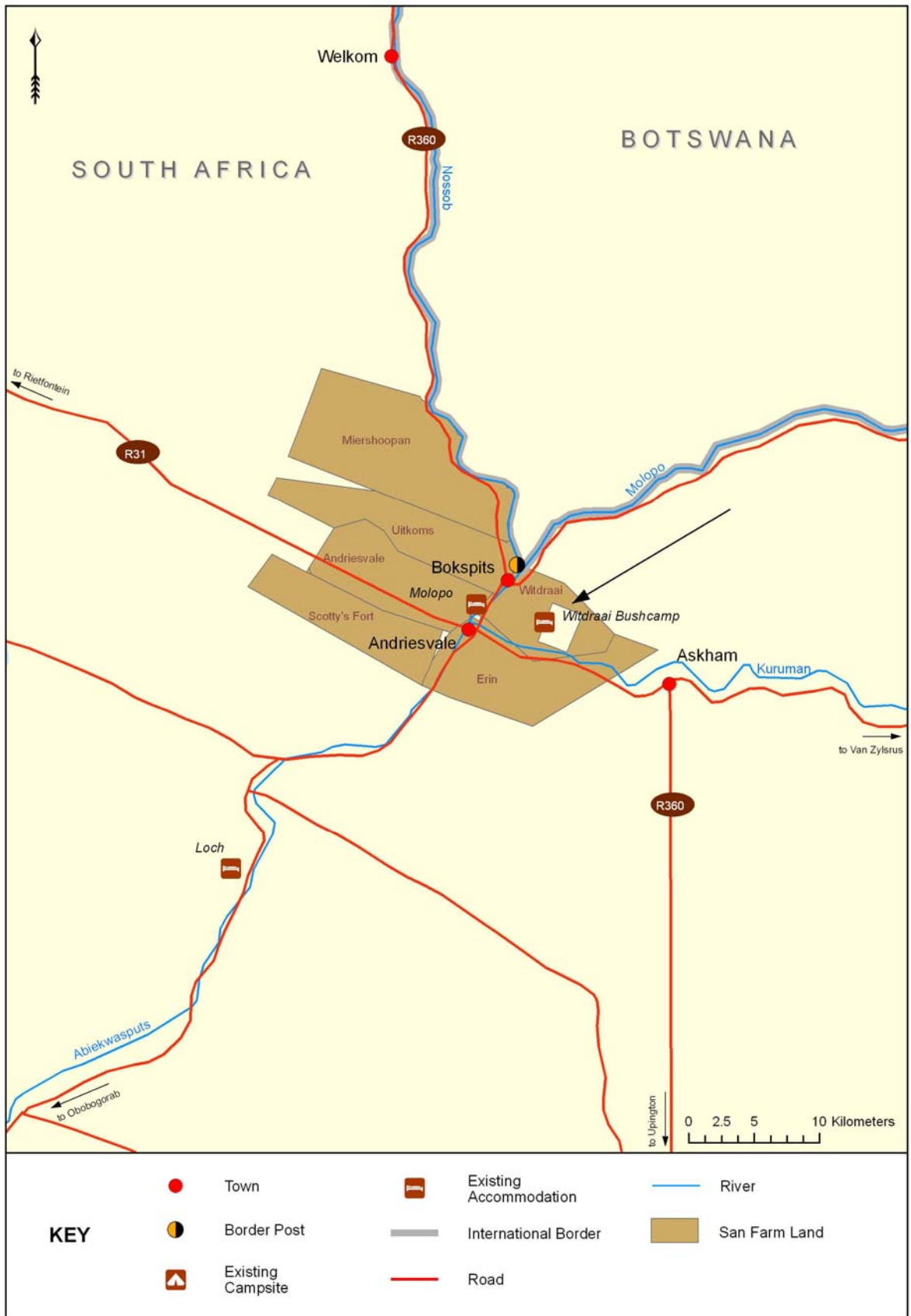
The rationale for this operation lies in the demand for authentic and accessible cultural activities by growing numbers of overseas visitors, as well as the discerning South African market.

Attractions

The attractions that this operation could offer once it is upgraded and / or relocated include:

- authentic, high quality cultural activities conducted by the !Khomani San community living on the Witdraai farm;
- a convenient location close to one of the main accommodation establishments in the area – Molopo Lodge;
- rustic and simple camping in a natural Kalahari desert setting; and
- availability of locally produced, high quality and authentic craft that provides visitors with a reminder of their visit to the community.

Map 14: Location of the Witdraai farm.



Preferred markets

The preferred market segments for this operation include:

- international FITs on regional itineraries;
- tour operators with international visitors on regional itineraries; and
- discerning local and regional FITs.

Zoning

Witdraai farm has been zoned by the community as a model Kalahari farm to be developed and managed for the benefit of community members wishing to retain historic traditions and culture or pursue a traditional lifestyle, as well as benefit from ecotourism initiatives on the farm, with access to basic services and education. The proposed operation is compatible with this vision, as well as the objectives and zoning contained within the management plan for the Witdraai farm (Witdraai & Erin Wyk Committee, Grossman & Holden, 2009).

Indicated developments

An operation of this nature requires little in the way of infrastructure development. Nonetheless, the following is recommended:

- a simple, rustic reception / welcoming point to Witdraai;
- a simple camping site in a private setting for accommodating overnight visitors (no running water is necessary, provided there are basic facilities such as a properly built dry toilet and bathing area). The location of this site should be within easy walking distance of the nearest settlement;
- renovation of current bush camp to cater specifically for groups that require a serviced campsite;
- a site close to the new camping area where basic traditional structures can be built for cultural performances and displays;
- an area close to the camping site where locally made handy crafts can be displayed and sold to visitors; and
- an access road of reasonable condition.

Activities

This operation's activities need to be the main focus of the visitor's stay, and should be of exceptional quality and authenticity. As a minimum, the activities should include:

- demonstrations of bush craft, wildlife tracking and hunting;
- traditional dances, story-telling and other performances;
- guided bush walks;
- traditional craft production and sale; and
- bush camping and possibly "home stays".

Environmental considerations

The following important environmental issues should be taken note of for this initiative:

- sustainability of water supply; and
- waste management.

Implementation method

For a product of this nature to be successful special emphasis must be placed on creating the highest quality cultural experience for visitors. This will require a great deal of support in the form of training and marketing, with help from the tourism private sector. It is therefore recommended that:

- The operation be structured on a similar basis to the very successful Ju/'hoansi living museum operating in Namibia at Grashoek (Humphrey & Wassenaar, 2009). This operation is run by the Grashoek community, but with long-term support from the Living Culture Foundation of Namibia (LCFN), a not-for-profit organisation comprised of experienced tour operators, which also directs their own and other tour groups, as well as overseas FITs to the village.
- Other implementation steps should be determined following the details feasibility assessment and business plan outlined below.

Financial indicators

Establishing a basic reception area, upgrading the rustic accommodation and developing a campsite will involve a capital investment of approximately R250,000. Annual turnover of some R250,000 at maturity will likely result in a net cash flow of R40,000 before tax and depreciation. The community could derive about R15,000 annually in concession fees. The business is expected to create 4 permanent on-site jobs with an annual payroll at maturity of approximately R100,000. Given its low margins, this business is rated as **financially marginal but moderately attractive** as a community-based product. **However, it is unlikely to be viable if the proposed bush camp and cultural activities are developed at the preferred location in the TCA (see section 4.4).**

Priority

Given its poor location in terms of the recommended markets and existing attractions, and the significant external inputs needed, this operation is not likely to be financially viable in the short to medium term. This project is therefore given a **low priority** rating.

Required interventions

The follow actions are required before the concession can be implemented:

- a rapid feasibility assessment to confirm tour operator interest and define details such as infrastructure requirements, the potential for activities and training needs;
- identification of a potential private sector mentor or partner that can provide training, support and marketing;
- agreement by the !Khomani San regarding the details of how the project will be implemented;

- development of a detailed business plan to guide the operation;
- integration of the proposed concession into the management and development plan for Witdraai farm;
and
- implementation of the project and contracting of the private sector mentor.

4.6 Miershooppan Hunting Concession

Location & description

This is a proposed new concession located on the Miershooppan farm (9,881ha), situated north west of Andriesvale and around 40km south of the KTP, as illustrated in **Map 15** below. This plan proposes that part of this farm be zoned for wildlife re-introduction so that a viable hunting operation can be sustained, with the assistance of a private sector partner.

Rationale

The rationale for this concession lies in the opportunity to “biltong” hunt in the Kalahari Desert, and the attractiveness of this to the domestic South African market. A hunting outfitter based in the local area has expressed an interest in using the farm as part of their regional hunting operation.

Attractions

The main attraction of this concession is the opportunity to hunt in a natural setting within the iconic Kalahari Desert.

Preferred markets

The preferred market segment for this concession is:

- domestic trophy hunting outfitters catering for the domestic “biltong” and trophy hunting market; and
- independent domestic biltong hunters.

Zoning

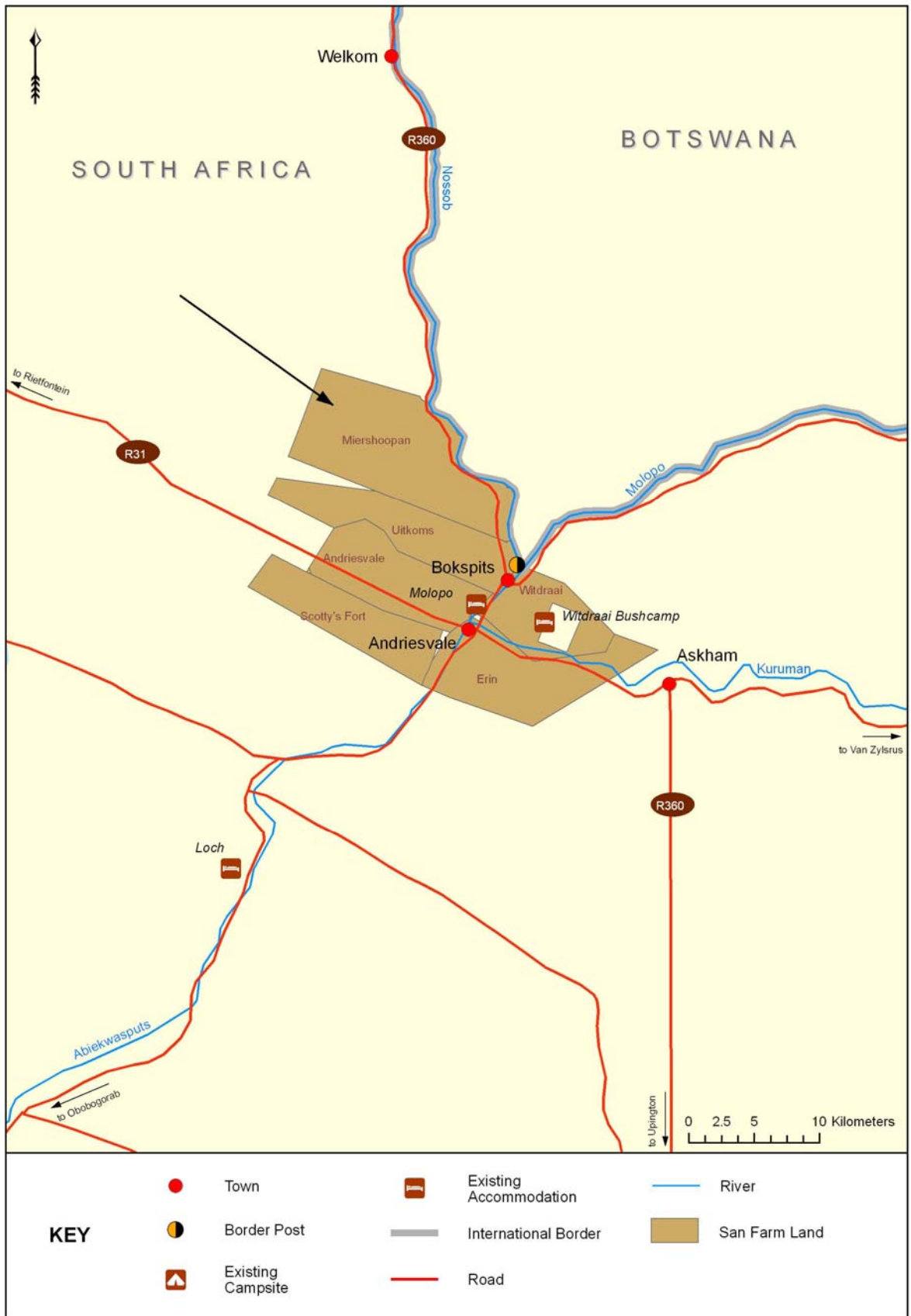
Miershooppan has been zoned by the community for mixed livestock and game farming where members of the ‡Khomani San community can practice subsistence and small scale commercial livestock and game farming on a sustainable basis. The proposed concession is thus compatible with the community’s zoning for this farm.

Indicated developments

The required developments for this trophy hunting operation include:

- repair and / or upgrade the necessary internal and / or external fences to game proof standards;
- re-stock the farm with wildlife species required by the proposed market;
- renovation / completion of the existing hunter’s accommodation that was initiated under the community’s former management;
- develop one or more temporary, reversible hunting camps at sites still to be decided on; and
- develop a game farm management headquarters, if deemed necessary by the feasibility study explained below.

Map 15: Location of Miershooppan farm.



Activities

All activities should be conducted by a professional hunting outfitter (either the private sector partner, or external professional hunters visiting the farm with their guests) and should include both trophy and “biltong” hunting.

Environmental considerations

The following important environmental issues should be taken note of during the planning and implementation of this concession:

- sustainability of water supply; and
- waste management.

Implementation method

The implementation method will depend on the outcome of the feasibility assessment referred to below. However, due to the cost and expertise required to establish a game farm and hunting operation, it is recommended that the following principles be applied:

- the concession be implemented using a build (or renovate), operate, transfer approach; and
- the concession should be awarded to an appropriately qualified private partner via a competitive bidding process.

Financial indicators

Accurate financial modelling requires more detailed assessment of the Miersshooppan property, but early indicative figures suggest:

- a relatively modest capital investment to upgrade the fence, develop management and tourism infrastructure and stock with wildlife;
- annual turnover at maturity of about R750,000;
- income before capital charges, depreciation and tax of approximately 250,000;
- 5 full-time jobs with an annual wage bill of approximately R100,000; and
- annual concession income of approximately R125,000.

The financial viability and economic desirability should be reassessed during the feasibility study referred to below. It is however clear that the concession requires an initial capital subsidy and a trophy-hunting firm with established credentials in the domestic market. **If a capital subsidy and appropriate operator are secured, the concession is likely to be financially viable and economically desirable.**

Priority

Given the interest expressed by a potential development and operating partner, this concession should be considered a **high priority**.

Required interventions

The following actions are required before the concession can be implemented:

- a rapid feasibility assessment to confirm investor/operator interest and define details such as infrastructure requirements and wildlife re-introduction volumes;
- agreement by the !Khomani San regarding the details of the proposed concession and investor procurement process;
- preparation of a management and development plan for Miershooppan farm and integration of the proposed concession into this document;
- the preparation and formal approval of detailed concession documents (including RFP and draft contract); and
- implementation of the agreed procurement process to identify and contract an appropriate private investor / operator.

4.7 Scotty's Fort Lodge Concession

Location & description

The Scotty's Fort farm (4,637ha) located approximately 60km south of the KTP as illustrated in **Map 16**. In the long-term, the proposed concession is for a mid-market roadside lodge and campsite to be developed on a 50-100ha footprint alongside the R360 gravel road, and situated at or near the current farmhouse. In the short-term this concession could involve the renovation of the farmhouse into a guest house / bed & breakfast facility for use by hunters visiting Erin or other farms in the surrounding area.

Rationale

The rationale for this concession lies in the potential for additional roadside accommodation south of the KTP, particularly for the long-term as volumes of visitors through the area increase.

Attractions

The attractions that this concession has to offer include:

- easy accessibility from the R360;
- location as a stop over en-route to and from the KTP;
- a nice alternative to Molopo Lodge that is away from the noise of the tar road and Andriesvale;
- access to hunting opportunities on the community's or other properties in the area; and
- access to cultural activities at Witdraai.

Preferred markets

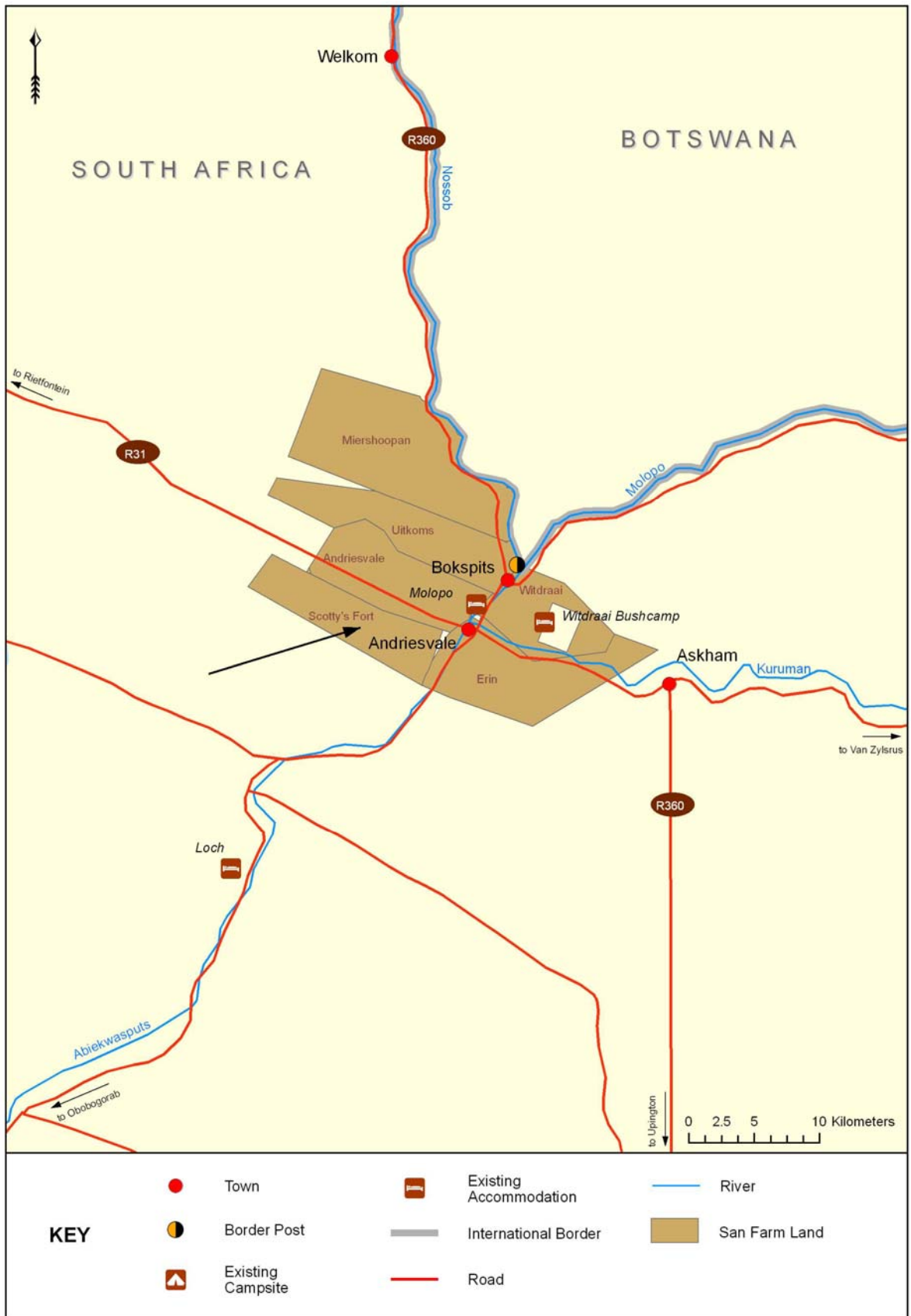
The preferred market segments for this concession include:

- domestic and regional FITs;
- international FITs on regional circuits;
- small, medium and large tour groups with international visitors on regional circuits; and
- trophy / biltong hunting outfitters and domestic individual trophy / biltong hunters seeking a regional base or stop over.

Zoning

Scotty's Fort has been zoned by the community as a livestock farm where members of the ǀKhomani San community can practice commercial livestock farming on a sustainable basis. This concession requires a minor alteration of the zoning in order to accommodate the lodge on a 50-100ha footprint at or near the current farm house. The remainder of the farm zoning would remain unchanged.

Map 16: Location of the Scotty's Fort farm.



Indicated developments

The following developments are recommended for this concession:

- development of a roadside lodge of sufficient scale to accommodate large groups (approximately 60-80 beds)
- an associated camping area with approximately 10 individual campsites; and
- the necessary support / back of house infrastructure such as staff housing etc.

Activities

Activities from this concession will be self-guided and operator-conducted, and will likely include:

- game drives and overnight stays in the KTP;
- participation in cultural activities at Witdraai and / or the TCA; and
- trophy and biltong hunting on neighbouring farms.

Environmental considerations

The following important environmental issues should be taken note of during the planning and implementation of this concession:

- sustainability of water supply; and
- waste management.

Implementation method

The implementation method will depend on the outcome of the feasibility assessment referred to below and in section 4.3. Nonetheless, it is suggested that this project be implemented in two phases:

- Phase 1 could include a renovation of the current farm house to serve as accommodation for hunters visiting the Erin or other neighbouring farms (see section 4.3). This will best be achieved via a renovate, operate transfer concession contract with the private sector partner contracted for the Erin Hunting & Tourism Concession.
- Phase 2 would likely involve a demolition of the phase 1 infrastructure and development of the new lodge and campsite. This should be implemented using a build, operate, transfer approach, and the concession awarded to an appropriately qualified private partner via a competitive bidding process.

Priority

Given the relatively low bed occupancies and achieved rates at lodges outside of the KTP, it is not envisaged that the full development of this concession (i.e. under phase 2) will be viable in the short to medium term. This concession is therefore awarded a **low priority** rating, unless the development and operating partner for Erin Hunting & Tourism Concession is able to make use of the farm house for guest or management accommodation.

Required interventions

The following actions are required before the concession can be implemented:

- a feasibility assessment to confirm investor/operator interest and define details such as size, boundaries, contract duration and infrastructure requirements etc.;
- agreement by the !Khomani San regarding the details of the proposed concession and investor procurement process;
- preparation of a management and development plan for Scotty's Fort farm and integration of the proposed concession into this document;
- the preparation and approval of detailed concession documents (including RFP and draft contract); and
- implementation of the agreed procurement process to identify and contract an appropriate private investor / operator.

5. Regional Interventions

This section summarises some regional interventions that are required to increase the flow of tourists through the planning domain, to improve on the current products, and enhance the visitor experience.

5.1 World Heritage Listing

The planning domain forms part of an area being considered for inclusion to South Africa's World Heritage List. The area, referred to as the !Xam & !Khomani Cultural Landscape, extends from the area south of Upington, north into the KTP. The rationale behind the listing includes the fact that the !Khomani are the last surviving indigenous San community in South Africa and their living cultural landscape is an important aspect of national culture" (UNESCO, website accessed 8th December 2009). From a tourism perspective, such a listing will heighten international and local interest in the planning domain, and has potential to support branding and marketing for the area. It is therefore recommended that this initiative be strongly supported by the community, private sector and the appropriate authorities.

5.2 Regional gateways

One of the issues identified during this study has been the absence of any sense of arrival into the planning domain. The San and Mier communities and the KTP jointly comprise one of the richest heritage areas in Southern Africa. It is recommended that the above message be provided to visitors entering the area through the design and construction of regional gateway points.

Recommended locations for gateways include each of the main park entrances (Twee Rivieren, Mata Mata, Mabuasehube and Kaa), as well as other major entry points such as Andriesvale, Rietfontein and Upington. Proposed infrastructure at each gateway might include a large, prominently located and high quality signboard and rest-stop or lay-by facilities. Signage should include a comprehensive tourism map of the area, indicating available accommodation, activities, and visitor services, as well as information about the area's significant heritage.

It is recommended that a feasibility study be conducted for designing, constructing and maintaining gateway facilities and that this be considered in conjunction with the proposed World Heritage Listing (refer to section 5.1) and heritage centre (refer to section 3.8). It is recommended that the study should focus, as a first priority, on the so-called "four corners" at Andriesvale/Witdraai where it should test the feasibility of an integrated "rest stop" (including a filling station, shops, craft outlet, communication centre, restaurant and information centre.

5.3 Regional tourism routes & promotion

To increase visitor flows through the planning domain, and particularly on the Botswanan side of the KTP, V&L Landscape Architects (2006) have proposed the development of a new road linking the Trans-Kalahari Highway with the Mabuasehube area. It is expected that this initiative, once implemented, will increase visitor volumes and diversify markets in the planning domain. As such it is recommended that this project be supported by all relevant authorities.

Visitor flow into the planning domain via Namibia and the KTP are somewhat constrained by the limited availability of accommodation in the Park and the compulsory two-night-stop rule imposed

by park authorities to address environmental constraints and visitor congestion. Nonetheless, it is expected that visitor numbers via all main routes will increase gradually over the next five to ten years, and this will be accelerated by the planned accommodation expansion by SANParks, Department of Wildlife and National Parks in Botswana, as well as the developments proposed in this document.

Development of the !Xam & !Khomani Cultural Landscape as a World Heritage Site (see section 5.1) will involve linking numerous points of interest from south of Upington to the Kalahari. This in turn has potential to form a tourism route for the area. It is therefore recommended that this listing process involves an assessment of the tourism potential within the World Heritage Site, and that resources are allocated to develop tourism opportunities in the future.

The Northern Cape Province is fortunate to have a number of tourism attractions in addition to the KTP, including the Riemvasmaak Hot Springs, Augrabies Falls, Richtersveld Cultural & Botanical Landscape (also forming part of a transfrontier park), the Namaqualand floral kingdom and a rugged but fertile coastline. Many of these attractions are not easily accessible along a single route and therefore need to be integrated with main population centres in South Africa as well as attractions in neighbouring countries to optimise tourism in the region. It is therefore recommended that new route development in the planning domain involve a consultation process between the appropriate stakeholders in South Africa, Botswana and Namibia to encourage greater cross border linkages.

5.4 Park development

In conjunction with other recommendations in this report, it is suggested that the KTP undertakes a re-branding exercise to help develop its image as a heritage and wildlife destination. Some suggestions for including in this exercise are:

- assess the current Park information and brochures and incorporate more heritage information;
- change Park sign boards to include more San names;
- consider a new logo and slogan for the Park that is more sensitive of local cultural history; and
- initiate heritage walks or trails, or integrate such themes into the current wilderness trails.

It is recommended that a feasibility study be carried out by appropriated skilled branding specialists, and based on this, a set of proposals be prepared and thereafter implemented.

5.5 Craft production & sale

The production and sale of craft in the area has potential to generate important livelihood benefits and cultural pride for members of the community. While the current craft programme has achieved some success, it appears to be subsidised by NGO and donor inputs and generates fairly small returns to members of the community.

It is recommended that a detailed assessment of the current programme be carried out. Such an assessment should include a full cost-benefit analysis, and a review of all inputs and value / supply chains from individual craft makers, through wholesalers and up to retailers. It is also suggested to re-assess the location of the current retail outlet, and to plan the development of a

more suitable facility, possibly integrating with the heritage centre proposed in section 3.8 or gateway facilities suggested in section 5.2.

Based on the findings of this assessment, it is suggested that a business plan be prepared to make further recommendations regarding the development and structure of the craft programme within a market context, and with economic impact, financial viability, sustainability and greater market reach as goals.

5.6 Guide training

Throughout the region tour guiding has proven to be an important entry point to the tourism industry for local people. Interventions by the ASLF in the Madikwe Game Reserve and adjacent communities has demonstrated the value to be gained by providing guide training to local people to support their entrance into this industry. Under a programme facilitated by the !Uruke project of SASI, at least 30 guides were trained and graded formally and many more have been trained and accredited as tour guides (Chennells, *pers. comm.*, 2010).

Nonetheless, it was also reported that a lot more work is required to develop local guides to a professional standard where they can sustain careers in the tourism industry, and as such very few currently work in this sector. One of the short-comings of the training conducted so far is that it did not integrate adequately with the local tourism industry to ensure trainees and graduates were employed during and after their courses.

It is therefore recommended that further investigations be carried out to assess the need for training and employment of local guides, and in particular, the likely support that a guide training programme will receive from the local private sector.

5.7 Other training

A major hindrance for members of the !Khomani San community to enter the tourism industry is the low level of literacy and English language skills. It is recommended that further research be carried out into the feasibility of initiating literacy and English language courses in the area.

6. Recommended priorities

Table 27 summarizes the recommended priorities for the proposed developments and activities outlined in this report. These priorities were identified based on several criteria including: market demand; likely product viability; potential uptake by investors or operators; possible financial and economic impact on the community; and the need to raise public awareness of the ǀKhomani San community. Given the limited resources available to support implementation, it is recommended that short-term implementation be focused on the development priorities rated “very high”.

Table 27: Recommended development priorities.

Very High	High	Medium	Low
<ul style="list-style-type: none"> • Southern Auob Concession (new) • Heritage Centre (new) • Erin Hunting & Tourism Concession (new) 	<ul style="list-style-type: none"> • !Xaus Lodge Concession (existing) • Wilderness Leadership Trails (existing) • Miershooppan hunting concession (new) 	<ul style="list-style-type: none"> • Cultural Activities from Resorts & Camps (new) • TCA Bush Camp & Cultural Activities (new) 	<ul style="list-style-type: none"> • ǀKhomani San 4x4 Route & Bush Camp Concession (new) • Witdraai Bush Camp & Cultural Activities (existing) • Scotty’s Fort Lodge Concession (new)

7. Recommended implementation strategy

This report represents a first phase in the detailed tourism planning process. The next steps to move this plan towards implementation include:

- meeting of the †Khomani San community to confirm the priorities and issue mandates to support agencies to start helping with implementation;
- presentation of the plan to SANParks KTP management, and agreement regarding the proposed developments / activities, as well as priorities;
- presentation of final report to other local, provincial and national stakeholders such as local private sector, Department of Rural Development, Department of Arts, Culture and Sport, and relevant regional and national tourism bodies;
- finalisation of the †Khomani San CPA institutional / legal structuring process that is currently underway with the help of legal experts. This process is critical to guide how the various projects, businesses, wards and the whole CPA are structured and inter-relate, also taking into account financial, tax and other implications;
- start implementing the very high priorities in accordance with the required interventions outlined in this report, including the sourcing of technical assistance to support the processes.

8. Conclusion

This tourism development plan provides an overview of the KTP and !Khomani San farmland, including their regional context. It also proposes a number of recommendations for developing tourism in these areas for the benefit of the community. These recommendations include the restructuring of existing businesses and concessions, as well as new tourism opportunities. A variety of development options and approaches are presented that will support the growth and diversification of tourism in the region. The report makes recommendations regarding the implementation method to be used in restructuring existing products and developing new ones. Environmental guidelines for each development are included, as well as summaries of the possible financial impacts from these recommendations.

It concludes that the current level of tourism use and development on the !Khomani San land is well below its potential. This is partly due to the area's remoteness from main routes, difficult access, and thus relatively low visitor flow, but also because of the lack of institutional stability, planning and land management to date. Nonetheless, it is expected that visitor volumes will increase over time, especially in light of regional interventions and expansion of accommodation stock in the area. The report demonstrates that by improving and expanding the existing operations and creating new products (capitalising on the heritage attractions of the area), significant financial and economic benefits can be achieved by the local community, the private sector and the state.

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9.2 People consulted

Person	Position / affiliation
Ana Rasa	Owner, Kalahari Trails
Andrew Hall	Senior Manager, Heritage Northern Cape
Barry Gray	Transfrontier Parks Destinations
David Grossman	Consulting ecologist
Dawid Kruiper	Traditional leader, !Khomani San community
Dupel Erasmus	Tourism Officer, KTP, SANParks
Gerrie	Owner, Donkerhoek Camp
Glynn O'Leary	Transfrontier Parks Destinations
Gus van Dyk	General Manager, Tswalu Game Reserve
Hanli Möller	Owner, Terra Rouge Lodge
Janine	Manager, Torgos Safari Lodge
Jeán Lambrechts	Owner, Molopo Kalahari Lodge
Johan Kriek	Transfrontier Parks Destinations
Keila Mierke	Craft Specialist, South African San Institute
Lara Kotze	Owner, Sitzas Lodge
Marieke	Manager, Kalahari Game Lodge

Person	Position / affiliation
Maureen	Manager, Auob Country Lodge
Meryl-Joy Wildschut	South African San Institute
Nico van der Walt	Park Manager, KTP, SANParks
Phillipa Holden	Consulting ecologist
Pieter Liebenberg	Owner, Red Dune Camp
Roger Chennells	Legal Advisor, South African San Institute
Robert Gordon	Wilderness Leadership School
Samuel /Goagoseb	Permanent Secretary, Ministry of Home Affairs
Shatho Lopang	Wildlife Officer, Department of Wildlife & National Parks
Willem de Wet	Managing Director, Namibia Country Lodges

Annex A: Questionnaires used during market survey

DATA FORM - ACCOMMODATION

Date: _____ Name of facility: _____

Names of owner & manager: _____ GPS position: _____

CHARACTERISTICS	DETAILS
Type of accommodation:	Fixed lodge / tented camp / campsite / mixed
Type of catering:	Catered / self-catered / mixed
Market level:	Budget / Mid / Up-market
Primary attractions in area:	
Number of:	<ul style="list-style-type: none"> • Rooms / tents: • Beds: • Campsites (indicate capacity):
Average occupancy in last 12 months (use either % occupancy or number of guests):	<ul style="list-style-type: none"> • % Bed occupancy: • Number accommodated in rooms: • % Campsite occupancy: • Number accommodated in campsites: • TOTAL:
Rack rates for all facilities (incl. VAT):	
Average % discounts / commissions paid to agents / operators:	
Activities on offer (plus price, incl. VAT):	
Average spend pp / pd (non-accommodation, incl. VAT):	

Market mix:	<ul style="list-style-type: none"> • % Namibian: • % SADC: • % Overseas (specify main overseas market):
Mode of travel:	<ul style="list-style-type: none"> • % Fly-in groups: • % Other tour groups: • % Self drive – own car: • % Self drive – hired car:
Niche markets:	<ul style="list-style-type: none"> • % business: • % leisure: • % other (families, fishing groups, birding?):
Average length of stay for:	<ul style="list-style-type: none"> • Normal guests: • Niche markets:
Average group size for:	<ul style="list-style-type: none"> • Tour groups: • Self drive: • Niche markets:
Peak seasons:	
Names of main tour operators using the facility:	
Gross Turnover in the last 12 months (excl. VAT and discounts / commissions):	ANNUAL TOTAL: _____
Number of employees in:	<ul style="list-style-type: none"> • Senior management: • Middle management: • Junior ranks: • Temporary • Part time
Annual wage bill last year	ANNUAL TOTAL: _____

Proposals for improving tourism in the parks, park management & infrastructure	Tourism in parks? Park management? Park infrastructure & equipment?
CAPEX	TOTAL CAPEX: _____

DATA FORM - TOUR OPERATORS

Date: _____ Time of interview: _____ Base: _____

Name of company: _____ Name of owner / manager: _____

QUESTIONS	DETAILS
Do you conduct tours through the area?	Yes / No How many per year? Group size? Use camping / lodges / other? Use budget / middle / upper market? Stay where? Nights in area?
Do you organise self drive itineraries through the area (FITs)?	Yes / No How many per year? Group size? Use camping / lodges / other? Use budget / middle / upper market? Stay where? Nights in area?
What new tourism developments do you think are needed in the area?	Accommodation: Activities: Attractions:
Do you have proposals for improving tourism in the parks, park management & park infrastructure / equipment?	Tourism in parks? Park management? Park infrastructure & equipment?

DATA FORM – INVESTOR

Date: _____ Time of interview: _____ Base: _____

Name of company: _____ Name of owner / manager: _____

QUESTIONS	DETAILS
What are your general perceptions of the area for tourism development?	
Is your company interested in investing in the area?	
If so, which specific areas?	
If so, what type of product is needed there?	Accommodation: Activities:
Scale of product:	Rooms: Beds: Activities:
If not, why not?	
Level of investment needed?	
Concession period needed?	
What other investment conditions would you need?	

Annex B: Guidelines & procedures for planning & design of facilities in KTP

(Source: Beyond Horizons Consulting & PPF, 2006)

1a TOUCHING THE EARTH LIGHTLY: PRINCIPLES

“*Touching the earth lightly*” is a maxim that expresses the relationship between man and the earth, an association based on *custodianship*, *sensitivity* and *respect*, that results in developments that have the *least possible impact* (both visually and physically) on the natural & cultural landscape, and that reflects both internally and externally, the “*sense of place*” evoked by the *intrinsic* qualities of the landscape.

- Planning and design must follow an iterative process that is strongly underpinned by a thorough analysis and understanding of all biophysical, socio-economic, cultural/historical and legal assets and constraints of the site.
- Developments should wherever possible have a sense of non-permanence and should if necessary, be easily removed from the landscape with minimum impact or permanent damage to the site.
- Developments should strive to reflect and not detract from the essential natural attributes of the landscape.
- Structures should be designed to be site specific and respond to the natural, cultural and biophysical attributes of the site
- The natural landscapes should in effect “flow” through and over structures were ever possible.
- Passive design principles should allow for maximum use of natural light and ventilation to reduce energy requirements
- Natural materials, textures & colours should be utilized wherever possible to facilitate structures blending into the natural landscape.
- Maximum use should be made of materials that enhance the “lightness” “naturalness” and “non-permanence” of structures, without compromising on the need to ensure comfort and cost effectiveness.
- Outdoor living areas should be as permeable as possible (decked rather than filled, concreted or paved).
- Structures should not compete with or detract from the cultural values of the site. This would not preclude cultural elements from being incorporated into designs, but without paternalism or affected stylistic embellishments.
- Visitor facilities (externally and internally) should enhance the visitor experience, reflecting the natural qualities and “sense of place” inherent in the natural & cultural landscape.
- Pedestrian access to facilities should wherever possible be suspended off the ground or constructed in a manner that has the least possible surface impact.
- Roads and services must have the least possible impact on the site, with all services (telephones, sewage, power etc.) being incorporated into suspended boardwalks or ducted into roadways.
- Vehicular access to sites must be minimized as far as possible, with centralized parking and minimum width roads. Roads should have the least possible constructed footprint – i.e. strip roads of “grass” blocks with planted verges and centers are preferable to tarred or concrete paved surfaces.
- Design of all infrastructure should wherever possible follow the principles of sustainability through:

- Lowering life cycle costs to maximize usage through adaptive, flexible use of renewable materials and energy sources.
- Meeting the needs of current generations without compromising the needs of future generations
- Applying touching the earth lightly to all aspects of the facility and in particular planning and design of access routes and the provision of services.
- The development should be designed so that the impacts of all associated infrastructure are minimized.

1b PLANNING GUIDELINES

During the zoning and planning process only a broad analysis of environmental criteria was conducted. Thus before site specific investigations are carried, a broad strategic assessment of the proposed facility should be conducted by following Strategic Environmental Assessment principle. This should include an assessment of alternate sites (a suitable method is contained in the SANParks CDF manual). Once the most suitable site has been identified and before any development plans are compiled, it is compulsory for a full detailed site survey and analysis to be carried out. The function of this exercise is to:

- Determine if there are any constraints that may make the site unsuitable for development (In SANParks an EIA is compulsory)
- Determine the most appropriate specific location of the facility and
- Ensure that the principles of sustainable design are applied.

If the principles of sustainable design are to be applied, then it is essential that three important steps are followed:

- All the bio physical informants of the site are surveyed for constraints such as the presence of rare and endangered species
- A detailed contour survey of the site showing all physical features at a scale of at least 1: 2 500 must be compiled.
- A full site analysis is conducted to understand how site factors will influence the design, orientation and location of facilities.

All of the above must apply not only to the facility, but to all associated facilities and the provision of access and services to the site.

Full details of how to conduct a site analysis can be obtained in the US National Parks Service manual "Guiding Principles of Sustainable Design". This is obtainable of their website: www.nps.gov

1c BUILDING SPECIFICATIONS

If the principles of "Touching The Earth Lightly" are to be applied then the following basic minimum standards should be applied.

- Minimizing above-ground masonry, (i.e. masonry or concrete may be used for septic tanks and soakaways, but not for floors or walls).

- The floors of toilets and showers may be constructed from removable pre-cast concrete slabs.
- Walls and roofs may be constructed from timber, poles, grass, reeds, canvas or any other temporary material.
- Floors may be constructed from natural materials (i.e. packed earth, termite mound material, etc.) or of wooden decking.
- Water heating facilities should be solar powered
- Cooking should be powered by bottled gas.
- Firewood must be transported to site and be obtained from a source outside of the park or from alien species control.
- Mechanical equipment (generators, pumps, etc.) must be effectively silenced; lighting must be inconspicuous and glare-free.
- Litter management: Where provided bins must be scavenger-proof. In more remote camps visitors must be encouraged to carry out all litter. All litter must be kept within a scavenger-proof cage until transported to an approved landfill or litter disposal site outside the protected area.
- If, for any reason (e.g. termination of lease of the site), the operator or authority ceases to operate the facility it must be possible to remove all facilities to Park Managements' satisfaction within two weeks of ceasing operations.

Annex C: Environmental guidelines for operation within South Africa National Parks

1. INTRODUCTION

South African National Parks (SANParks) is embarking on a new venture to commercialise a portion of its operations. One aspect of this effort is the concessioning out of several tracts of land within the National Parks for the exclusive use of private operators. As the custodian for the Parks, however, SANParks will retain broad oversight responsibility for these lands. In this context, SANParks has established Guidelines for both the Construction and Operational Phases of the development process.

1.1 Legislative Basis for these Guidelines

SANParks is bound by a number of statutes with relevance to environmental and conservation management of Parks, including the National Environmental Management Act of 1998 (NEMA), Environment Conservation Act of 1989, National Parks Act of 1976 and National Water Act of 1998. Key requirements resulting from these various statutes are discussed below.

The South African Department of Environmental Affairs and Tourism (DEAT) has adopted an Integrated Environmental Management (IEM) Procedure to guide the planning and implementation of development proposals. According to DEAT, the purpose of the IEM procedure is "to ensure that the possible environmental consequences of development proposals are investigated and understood before decisions are taken, enabling informed decision-making and accountability for decisions taken." The IEM procedure applies to a prescribed set of activities, as well as to any development that might affect a "designated area or feature," one of which is "national, provincial and municipal nature reserves."

A key component of the IEM procedure is the preparation of an Environmental Impact Assessment (EIA) of the proposed development. Under the IEM framework, EIA's must be prepared for prescribed activities and/or activities that might affect a designated area such as a national park. In March 1994 DEAT published draft legislation for compulsory EIA's. In April 1998, under the authority of the Environment Conservation Act, DEAT promulgated a Guideline Document for implementing the EIA regulations. The Guideline Document further specifies activities for which an EIA is required to include "public and private resorts and associated infrastructure," where a resort is defined as "a place frequented by people for holiday, recreation, health or similar purpose." Under the EIA Guidelines, EIA's must be prepared by an independent consultant.

The EIA for each Management Area must rely on detailed information provided by the Operator in the Development and Environment Proposal, supplemented by specialists' reports and input from interested and affected parties (IAPs) during the EIA process. The Development and Environment Proposal must be sufficiently detailed regarding key aspects of the development to enable evaluation at the time the Bids are reviewed. Development and Environment Proposals lacking sufficient detail may be disqualified.

The EIA's for all Management Area developments will be reviewed by DEAT, the "relevant environmental authority" as defined in the EIA Guideline documents. SANParks also will have a role in the review of the EIA's, both as an IAP and as the regulatory authority with jurisdiction over

the National Parks. All EIA findings and recommendations, including the detailed Environmental Management Plan (EMP) that addresses both the Construction and Operational Phases of the development, will be incorporated by reference and in full to the Management Agreement.

1.2 Guidelines Based on SANParks Internal Requirements

SANParks anticipates that national EIA regulations will adequately cover many of the issues that will arise during the assessment of Management Area developments within the National Parks. In addition, SANParks has undertaken a review of its internal policies that may impact on Management Area developments. A large component of this effort focused on policies associated with the Kruger National Park (KNP) where, because of its size and importance within the National Parks, planning efforts are more advanced than at many other National Parks.

As a result, some of the Guidelines contained herein flow from internal SANParks management documents, such as the Kruger National Park Management Plan or Memorandum of Understanding between the Governments of the Republic of South Africa and Botswana regarding management of the Kgalagadi Transfrontier Park. In some instances, however, these documents were neither sufficiently comprehensive nor sufficiently detailed to provide clear guidance as to the allowable parameters for development by commercial operators. Where this occurred, SANParks undertook an internal effort to develop the necessary Guidelines.

A series of workshops was held with conservation staff from within SANParks, and specifically from KNP, who assisted in establishing standards to be applied to commercial tourism developments within the National Parks. Draft standards were reviewed by a wide range of professionals within SANParks, including the Manager, Environmental Management, and Park rangers and staff from Scientific Services, Conservation Development, Park Planning and Technical Services. The Guidelines contained herein are the result of these efforts.

The Environmental Guidelines set out and referred to in this document must be regarded as a first step in SANParks' efforts to compile a comprehensive Environmental Management System (EMS) for the entire National Parks. Once in place, the EMS likely will be modified and refined over time, as and when needed to take into account new information, standards and conditions. Operators must be aware, therefore, that the terms and conditions set forth in these Guidelines are subject to amendment. Operators will be expected to comply at all times with the provisions of the Environmental Guidelines as they may change from time to time.

The remainder of this document presents the specific standards or parameters that the Operator will be expected to apply to activities in its Management Area.

1.3 Precautionary Principle

Ecological and natural resource processes are not always clearly understood, nor are the interactions among such processes. SANParks recognises that issues may arise suddenly, or circumstances change, due to limitations in current knowledge. SANParks has endeavoured to identify these limitations wherever possible, and to design the concessioning process in a way that minimises the environmental risk to the national assets under its control.

2. ENVIRONMENTAL GUIDELINES

Environmental impacts will occur during both the Construction and Operational Phases of the development. These impacts and the Guidelines that apply to each, are described below.

2.1 Preparation of an Environmental Management Plan

The Republic of South Africa's IEM Guidelines require that the EIA report for each Management Area include a detailed Environmental Management Plan (EMP). The EMP typically becomes part of the Record of Decision (ROD) prepared by the relevant environmental authority that reviews the EIA report (in this instance, DEAT). The ROD is a legally binding agreement between the project developer and the environmental authority, and becomes the basis for monitoring compliance with the recommendations of the EIA both during both the Construction and Operational Phases. The EMP will form the basis of the environmental performance conditions in the Management Agreement between the Operator and SANParks. The EMP must address both the Construction and Operational Phases.

2.2 Appointment of an Environmental Control Officer

Sponsors of many large scale developments undertaken in the Republic of South Africa in recent years have appointed an Environmental Control Officer (ECO) to ensure that mitigation measures and other requirements set forth in the EMP are adhered to. SANParks endorses this measure and will require all Operators to appoint an ECO during both the Construction and Operational Phases. The cost of the ECO shall be borne by the Operator. The individual appointed must be an independent consultant, as defined by the EIA Guidelines (see fn. 3 above), and be acceptable to SANParks. During the Construction Phase the ECO shall submit monthly reports, and during the Operational Phase the ECO shall submit twice-yearly reports. In both cases, reports must be submitted to both SANParks and the Operator.

2.3 Cultural and Natural Resources

SANParks is not presently aware of any cultural or archaeological sites within the Management Areas that will preclude development. A more detailed survey will be required during the EIA process, however, and must include a specialist report on the cultural and archaeological resources that occur in the Management Area. Prior to commencement of the Construction Phase, the Operator shall be responsible for arranging a pre-construction 'walk through' of the Development Site by a qualified archaeologist to identify undocumented cultural or archaeological resources.

The Operator's construction supervisors and crews must be trained to recognise cultural resources, in the event of 'chance finds' during construction. All such finds must be brought to the immediate attention of the Section Ranger or other relevant SANParks staff member.

If the Operator discovers undocumented cultural sites or artefacts of any type at any time during the Contract Period, these must not be disturbed, damaged or removed. All such finds shall be brought to the immediate attention of the Section Ranger or other relevant SANParks staff member.

Appropriate specialists must undertake a survey of the natural resources occurring in the Management Area during the EIA. The purpose of such a survey is to ensure that no rare,

threatened or endangered species or habitats will be affected by construction-related disturbances to the natural environment.

2.4 Biosphere Manipulation

Developments and activities must adhere to all relevant SANParks rules regarding biosphere modification and habitat manipulation. In the context of commercial tourism developments, several requirements must be emphasised. No bush clearing is allowed, either to enhance game viewing, obtain firewood, or for any other purpose. Limited bush clearing will be allowed within the Development Site for the purposes of clearing and levelling prior to the Construction Phase, subject to any restrictions identified by the EIA and included in the EMP. Introduction of alien vegetation is not permitted under any circumstances. Baiting of wildlife to enhance viewing is not permitted.

2.5 Carrying Capacity

The Operator must adhere to the bed limit that SANParks has established for the particular Management Area. It must be noted that the bed limit includes all staff beds used in SANParks rest camps, and relates to the maximum number of persons on the management area at any point in time. The Management and Environment Proposal must include the number of guest and staff beds the Operator intends to have within the Management Area.

SANParks acknowledges that tourism operations of the type to be operated in these Management Areas generally have approximately 25% of their resident staff on leave at any given time. SANParks will take this 25% leave factor into account in determining the actual number of beds at the Management Area. In other words, if a site has a carrying capacity of 100, of which 70 beds are allocated to guests and 30 to staff, then a design that proposes 40 staff beds (to accommodate the 25% leave factor) will be acceptable. SANParks will expect that the limit of 100 persons is respected, however, and failure to respect it will constitute a breach of the contract.

2.6 Visual Impacts

Any development within the National Parks must take due cognisance of the visual impacts it may have on surrounding areas and other Park users. SANParks has based its guidelines for visual impacts on interpretations of existing management documents, specifically the zonation plan of the park. This plan zoned the Kgalagadi Transfrontier Park according to 'Recreational Opportunities' representing different degrees of 'wilderness qualities' ranging from 'pristine wilderness areas' to 'high density development areas.' Most of the Management Areas in SANParks are located in 'limited access, motorised general visitor areas' which are defined as areas "with gravelled roads and one small camp..." Pristine wilderness is defined as an area "...in which small groups can hike on foot and overnight anywhere in self-carried tents with a 'no trace left' camping ethic." Primitive wilderness area is defined as "...similar to the above (pristine wilderness) but do have some signs of human impact visible on occasion."

These definitions suggest that no developments should be visible from pristine wilderness areas, but that it would be acceptable if such developments were visible from primitive wilderness areas. It is assumed that 'visible' means to the naked eye. The structures also must not be visible from existing public Park roads. For those National Parks where zonation or management plans are not yet available, these principles will apply within the context of the particular Park, and the

location and design of the development. That is, the developments may not be visible from other tourism developments or facilities, or in the Park generally.

Irrespective of the zonation designation of the area, SANParks believes that visual impacts must be reduced further by utilising aesthetically pleasing structures that blend into the environment. For example, structures that break the skyline will be more visible than will those that lie below the tree line. Careful design both reduces visibility over large distances and affords the Operator an attractive product that satisfies guests' desire to enjoy a 'wilderness' experience. Developments that are well hidden within broken topography, hills, or mountains result in less visual impact than those situated on hilltops or plains. The EIA must specifically assess the visual impacts of all structures, signage and other significant aspects of the development, and the Operator must implement the mitigation measures set forth in the EIA in regard to visual impacts.

The building style -- structure, materials and design -- must be in harmony with the environment including relief, local culture and physiognomy. The height of buildings is important. Structures more than two stories in height are not permissible, with the exception of the Kgalagadi Transfrontier Park, where only single story structures are permitted.

There are many 'unnatural' features visible from within many Management Areas, and the Operator must consider these features in siting the development, so as to reduce their visual impact on guests.

2.6.1 Building Materials

The use of local building materials will not be permitted as a general rule. In exceptional circumstances, it may be appropriate to use certain local materials. In such instances, the use of such materials must be subject to the findings of the EIA, and the Operator must obtain written approval from SANParks.

2.6.2 Lighting

Developments that blend into the landscape during daylight hours may nonetheless be visible over long distances at night as a result of artificial lighting. The Operator shall therefore take the impacts of lighting into consideration in siting and designing the development. Such impacts can be minimised, for example, by utilising reflected light off low reflective surfaces. Lights illuminating pathways and other areas must be low to the ground and directed downwards. Similarly, lights at artificial water features, including those associated with Web cameras, if these are permitted, must be positioned so as to minimise visual impacts. The design must consider the need to obscure fires and other light sources away from areas of the Park where they may be visible.

2.6.3 Lightning Arrestors and Radio Masts

Such structures likely will be required at most developments to comply with insurance provisions and ensure adequate communications. The visual impacts of any and all such structures must be assessed fully in the EIA.

SANParks is well aware that standards and "best practices" with regard to telecommunications technology are currently changing at a rapid pace. SANParks is currently in the process of determining which sorts of communications are most appropriate within a National Park. The

Operator acknowledges, therefore, that SANParks' determination as to what is acceptable may change over time, and that it will be expected to comply at all times with recommended "best practices."

2.7 Bulk Infrastructure

2.7.1 Electricity

Provision of electricity from the national grid to a Management Area can have a significant environmental impact. The Operator shall ensure, therefore, that if electricity is brought into the Management Area, the environmental impacts of doing so are considered fully.

If the Management Area is one for which electricity from the national grid must be reticulated over long distances, and/or through sensitive areas or restricted zones, the Operator is unlikely to use this energy source, as the cost likely will be prohibitive. Electricity brought to the Development Site must be transmitted along the route with the lowest cumulative impacts, as determined by the EIA.

SANParks envisages that, for some Management Areas, alternative energy sources will be the only viable option. Solar power or generators generally will be the most practical of these. Some Management Areas already have solar power that may prove adequate for the proposed development. If new solar panels are installed, their visual impacts must be considered, along with the disposal of batteries and their by-products, in the context of the EIA. The size of the development must take into account the limitations of these alternative sources, with the likely result that smaller developments will be most appropriate for certain Management Areas. Generators will be permitted, although the potential environmental impacts (noise, potential contamination from oil and fuel spills) must be considered in the EIA and effective mitigation measures implemented to address these impacts.

2.7.2 Water

Reliable water of good quality and sufficient quantity is essential for any tourism development. Identification of an adequate source of water must be a key factor in determining where a development should be sited. Water is a limiting factor throughout the Republic of South Africa, and the Management Area's 'carrying capacity' in respect to available water resources must be a major issue for consideration in the EIA.

Given constraints on water supplies in many areas where National Parks are located, SANParks encourages systems that enable reuse of treated water. Indeed, no matter how abundant the water supply, SANParks encourages Operators to implement water conservation measures in the design of their developments. Strong consideration must be given to recycling, especially if water holes, garden irrigation and other water-intensive amenities are to be provided. As a general rule, total water extraction from any and all sources within the Park must be limited to not more than 350 litres (l) per bed per day. This number must be viewed as a maximum, and Bidders are encouraged to take steps to keep actual water use below this amount. Gardens, lawns and water features must be designed to meet this limit.

Artificial water features to attract game may be supplied from an additional quota, subject to the capacity of the water source(s) as determined by the EIA. Under the provisions of the National Water Act, South African law requires that a permit be obtained from the Department of Water

Affairs and Forestry (DWAF) for use of water from both surface and underground sources. The DWAF permit requirement applies to both new Management Areas and existing developments, and to sources within and outside of the Park. SANParks will monitor all water extraction points. The Operator must therefore ensure that requisite meters are installed at all extraction points and that these are functional at all times. If the extraction limit proves insufficient, the Operator must reduce water use - for example, by outsourcing high use activities such as laundry. In extreme cases the number of tourists accommodated at a particular Management Area may have to be reduced, either permanently or temporarily during severe dry periods. In cases where certain activities of the Operator are being undertaken away from the Management Area (e.g., laundry) but on other SANParks property, the overall quota of 350l per bed will apply collectively to all water sources used by the Operator.

If water is supplied to the Management Area from a distant source, the EIA must consider the impacts of the supply pipeline.

2.7.3 Water Sources for Attracting Wildlife

Most parks have an Artificial Water Provision Policy and any opening or closing of water holes must be done in consultation with SANParks staff and with due cognisance of this Policy. SANParks reserves the right to close any water features as necessary to carry out its Park management activities. Every effort will be made not to close water features in the Management Areas over the life of the Contract Period. The EIA must include an assessment of all artificial water features. The exact design, size and location of new water features must be determined in consultation with SANParks.

In cases where an artificial water feature is destroyed by natural causes, SANParks will allow the Operator to develop an alternative source for the remainder of the Contract Period. The location of this alternative feature must be determined in consultation with SANParks, and the cost of developing it will be for the Operator's account, as will routine maintenance of all such features.

2.8 Communications Infrastructure

2.8.1 Telephones

Given the increasingly widespread availability of microwave and other wireless telephone systems, Operators must make use of these types of systems for their telephonic communication needs. The Operator must arrange for service with the appropriate telephone company.

2.8.2 Radios

Most Operators will require radios for communicating with their staff in the field, and for maintaining contact with relevant SANParks staff in the event of emergencies. It must be noted that, in addition to normal South African licensing laws, the Operator will require permission from SANParks to operate any radio frequency within a National Park.

Operators may not utilise SANParks radio networks. SANParks will, however, add the Operator's channel to the relevant Park's radio network, to enable the Operator to contact the Section Ranger in the event of an emergency. The cost of adding a channel to SANParks' network will be for the Operator's account. Installation of radio masts is a prescribed activity under the Republic of South Africa's EIA Guidelines.

2.9 Waste Management

2.9.1 Liquid Wastes

The Operator must provide a wastewater management system capable of ensuring that liquid wastes are treated to a level that meets or exceeds South African water quality regulations prior to discharge or reuse. Sufficient detail regarding the proposed sewerage system must be provided at the time the EIA is undertaken to enable the EIA consultant to evaluate the soundness of the proposed approach. SANParks prohibits the use of either French drains or French drains used in conjunction with septic tanks at any Management Area, unless otherwise agreed to in parks where environments do allow for these systems. Given constraints on water supplies in many areas where National Parks are located, SANParks encourages the use of systems that enable reuse of treated water. The Operator must make provision for monitoring the quality of wastewater discharge, on at least a monthly basis, by a qualified, independent body acceptable to SANParks. Monthly monitoring reports must be made available to SANParks, which will oversee compliance with relevant standards.

Fuels, solvents and other liquid wastes (e.g., used oils from vehicles) must be stored on site in vessels equipped with secondary containment structures to prevent contamination of soil, groundwater and surface waters due to accidental spills or releases. These must be removed from the Management Area and disposed of in accordance with all applicable national, local or SANParks requirements.

The Development and Environment Proposal must include an estimate of the approximate volume of wastewater that the development will produce daily, as well as a description of the method of treatment and recycling that the Operator intends to install.

The EMP must include a liquid waste management plan for both the Construction and Operational Phases, which will be monitored by the ECO.

2.9.2 Solid Wastes

SANParks encourages Operators to implement a policy of sorting and recycling solid wastes. Wastes that cannot be recycled must be removed from both the Management Area and the Park and disposed of appropriately. Landfills are not permitted in any Management Areas. Biodegradable wastes must be disposed of in incinerators or in approved waste sites outside the Park, or in the case of Kgalagadi Transfrontier Park, an agreement must be reached on the use of the registered landfill site in the park. SANParks will process Operators' biodegradable wastes in its incinerators, where these are available and providing the units have sufficient capacity. SANParks will charge the Operator a fee for this service on a cost recovery basis. The Operator will be required to transport wastes to these units in a responsible manner.

The Operator must include in the Development and Environment Proposal estimates of the volumes of solid waste, for different waste categories, that the development is expected to generate. If the Operator anticipates it will need to construct an incinerator on site, this requirement also must be included in the Development and Environment Proposal. Ash from incinerators must be removed from the Management Area and Park and properly disposed of. The EIA must consider the design and capacity of the unit to be installed, as well as the suitability of the Development Site to this type of facility.

Solid wastes may need to be stored before being processed or removed from the Management Area. In these instances, the storage facilities must be secured from wildlife and ensure pollution does not arise. SANParks has developed appropriate design standards and specifications for such storage facilities. The EIA must address the siting and design of all storage facilities.

Solid waste management during both the Construction and Operational Phases, including site rehabilitation after construction is completed, must be addressed in the EIA and included as items in the EMP.

2.10 Roads and Tracks

SANParks recognises that the type of tourism product likely to be offered at the Management Area will necessitate a certain network of road and tracks, both for access to and from the Management Area for guests and supplies, as well as for guided game viewing for guests. The Operator may utilise existing roads and tracks in its Management Area but must take responsibility for maintaining same to SANParks' satisfaction. If the Operator identifies certain Park roads or tracks that it does not wish to utilise during the Contract Period, this must be indicated to both SANParks and the EIA consultant at the time the EIA is undertaken.

2.10.1 Siting and Design of new Roads and Tracks

Roads and tracks can have a major impact on ecosystems, particularly in terms of erosion and sedimentation of local watercourses. To minimise these impacts, the siting of new roads and tracks must take into account the type(s) of soils, presence of water, and other factors related to the degree of impact they will have. New roads and tracks for game viewing purposes shall be limited to the amount that SANParks has established for each Management Area. All new roads and tracks must be subjected to a detailed assessment as part of the EIA process. Roads shall be sited on soils conducive to road development (such as those that are not highly erodible or with lower clay contents) and which will enable access throughout the year. Such roads will generally entail the lowest cost both in terms of construction and maintenance, and likely will result in fewer negative environmental impacts.

2.10.2 Standards for Roads and Tracks

The types of roads and tracks built must be consistent with the use for which they are intended, and must comply with relevant Park standards. The Operator must indicate in its Development and Environment Proposal the type and quantity of traffic that is expected on these roads. The design, layout, construction and maintenance of roads will vary among Management Areas. The Operator will bear the cost of these activities.

All tracks for game viewing purposes must be kept to the narrowest width possible to accommodate one vehicle at a time. Wide roads are costly, not in keeping with the type of product being offered, and typically have greater environmental impacts and higher costs. All roads and tracks must be designed with minimal disturbance to the environment as a priority. SANParks expects that construction of two-spoor tracks for game viewing purposes will need to be done largely manually, to prevent unnecessary disturbance to the environment. The use of heavy machinery to construct tracks is permitted only where it is absolutely essential, in consultation and with the approval of SANParks.

Where possible, roads must be built with in situ material rather than by importing gravel into the area, because of the potential environmental impacts, possible introduction of alien species, and cost of transporting such materials. In some Management Areas, however, it may be necessary to import gravel for hardening and capping certain roads to ensure year-round access. The location of 'borrow pits' or quarries for this purpose must be done in consultation with Park staff and subject to an EIA, which will also address maintenance, management and final reclamation of all roads and tracks. If gravel must be imported from outside the Park, the Operator must notify SANParks, and SANParks will ensure that the gravel comes from an acceptable source.

Detailed siting, alignment and 'ground truthing' of the road and track network for each Management Area will be done at the time the EIA is conducted, in conjunction with the relevant Section Ranger and SANParks soil scientist.

2.11 Fire Management

Fire management is an important concern at all National Parks. SANParks recognises the need to balance the intent of its fire management policies with the understandable desire of the Operator to protect its investment in the event of a major fire. The Operator must implement fire prevention and life safety measures that comply fully with South African standards (SABS 0400).

Within a Management Area, natural fires may not be controlled, except in the immediate surrounds of the Development Site, and/or to save human life or property. Control of natural fires that occur elsewhere in the Management Area is the responsibility of SANParks. Under no circumstances may an Operator attempt to control natural fires without SANParks consent and direction. SANParks encourages Operators to train their staffs in fire protection and response techniques, and to make staff available to assist SANParks in fire response activities.

Should a significant portion of a Management Area burn in one season, SANParks will permit traversing in other nearby areas, in consultation with Park staff, until the burned areas have recovered sufficiently. If this is in a 'general public area,' normal rules and conditions applicable to the public will prevail. The Operator must familiarise itself with the relevant fire policies and procedures of the Park in which its Management Area is located.

The EIA must address issues relating to fire safety and management as they apply to the Management Area. At the time the EIA is undertaken, the Operator must subject its designs and safety specifications to a 'fire safety audit' carried out by a qualified fire safety expert. Should this expert make any modifications or recommendations, these must be incorporated into the EMP.

2.12 Staff Issues

2.12.1 Construction Workers

SANParks will make arrangements for gate access to the Management Area for all permanent and casual workers involved in the Construction Phase. The total number of people to be employed on site during Construction must be provided and addressed in the EIA. The EIA will assess all of the key Construction issues, including access to site, temporary accommodation, source of water, provisions for solid and liquid waste removal, etc. The Operator must abide by all of the recommendations presented in the EMP. SANParks will the Operator to maintain close communication and co-ordination with National Parks staff throughout the Construction Phase.

2.12.2 Staff Accommodation

The Operator must accommodate as many staff as practical off-site, as doing so commonly reduces the environmental and social impacts of the development. However, in Management Areas located further from entrance gates, a higher proportion of total staff may require on-site accommodation. All staff accommodation must comply with national building regulations and standards. SANParks will allow only single accommodation units; no dormitory structures will be permitted. This restriction applies to all Management Areas, including those utilising tented structures. On-site staff accommodation requirements, including design and location of all units and associated facilities, must be included in the Development and Environment Proposal. The Development and Environment Proposal also must indicate the number of people to be accommodated on site, including family members.

2.12.3 Collection of Natural Resources by Staff

No natural resources may be collected and used within any Park without written approval from SANParks. Specifically, the collection of firewood for cooking and other uses is not permitted, during either the Construction or Operational Phase. If firewood is brought in from outside the Park, it must be done in accordance with relevant Park policies. Some National Parks may only permit the use of firewood from approved alien vegetation clearing operations.

2.12.4 Staff Health and Safety

The Operator must implement a staff medical plan that complies with the Health and Safety Act. The Operator also must have an emergency medical evacuation policy that covers both guests and staff in the event of a serious injury or acute medical emergency. Relevant staff must be trained in and aware of this policy. All buildings, vehicles, machinery and other structures (including their operation) must comply with relevant South African legislation and standards. The design, construction and layout of facilities must take cognisance of dangerous animals that occur at all the Management Areas.

2.13 Access

2.13.1 Park Entrance Gates

All guests, deliveries and other vehicles entering National Parks will have to do so through SANParks designated or otherwise agreed entrance gates. In general, standard opening and closing times will apply. The Operator may negotiate special provisions with SANParks to accommodate late guest arrivals or to allow staff to leave the Park outside of normal hours. Such provisions must be agreed in writing by the relevant Park Manager. All Management Area guests must pay relevant Park entry fees, although SANParks will allow Operators to pay these fees on a monthly basis rather than at the time of entry. Such entry fees are separate from and in addition to the Management Fee. Operator staff commuting to and from the Management Area to carry out the terms of their employment does not pay Park entry fees.

Control of gates will in most cases lie with SANParks; although actual gate management functions may be out-sourced. Should any additional costs be incurred by SANParks as the result of changes required by the Operator to the current status quo, these will be charged to the Operator.

For some Management Areas, access by guests and staff may be required beyond normal gate opening times. SANParks will allow extended access times under the following conditions:

- If a valid need is identified by the Operator and the Park Manager and Operator can come to an agreement on this.
- Any additional costs that SANParks may incur as a result will be for the Operator's account.
- An extended permit to enter or leave outside of normal gate times must be obtained from the relevant Park Manager. This permit may impose additional limitations to those defined herein, such as speed limits, type of vehicles permitted, and other operational provisions.
- The Operator must ensure that only designated staff are permitted to transfer guests and staff, either in Operator vehicles or in a convoy between the Management Area and a specified exit/entry point to the Park. All designated staff must be identified on the SANParks permit. Such staff must observe all normal speed limits and other traffic regulations. In addition, staff must be made aware of the environmental and conservation issues relating to night driving, especially with regard to other Park users (i.e., on night drives), and animals and birds that may be temporarily blinded by vehicle headlights. Deviating from the designated route will not be permitted.

2.13.2 Access by Private Aircraft

Air traffic over and into all National Parks is limited by law. No private aircraft may land except at designated landing areas. As a general rule, private airstrips or helipads will not be permitted within the Management Areas.

SANParks is very conscious of the potential impact of aviation operations on the environment and visitor experience in Kgalagadi Transfrontier Park and therefore the use of the existing landing strip for commercial purposes must be agreed to by Park Management, with an investigation into the conditions that will apply.

2.13.3 Access to Management Areas by SANParks staff

SANParks staff or their agents will have access to all Management Areas at all times for the purpose of carrying out normal management activities.

2.14 Operator Vehicles

2.14.1 Vehicle Standards

All game drive vehicles and game drive activities must conform to minimum standards, as detailed below.

- All drivers must be in possession of a license for the category of vehicle they are operating, and of SANParks permits for both the vehicle and the driver;
- All vehicles must be licensed with the relevant authorities, and operators must ensure they are roadworthy;
- All vehicles must be fully insured against all perils and third party liabilities;

- Prior to commencing operations, the Operator must provide SANParks and the relevant Section Ranger with a list of all of its game drive vehicles, including the vehicle specifications and registration numbers of each;
- Vehicles may not exceed the size of a typical LWB Toyota Land Cruiser with a 1-ton net capacity. The exception to this restriction is a delivery vehicle travelling on the main designated arterial access road;
- 4X4 capability is essential;
- Basic tools for typical repairs and first aid kits must be carried on all vehicles;
- All vehicles must be fitted with a two-way radio that is in communication with the Operator's base facility at all times;
- A rack for carrying a firearm must be fitted in an appropriate place;
- Seating must be fixed to the vehicle. Loose seats are not permitted;
- Vehicles must have an appearance that suits the character of the experience being offered;
- Guests may not stand up in the vehicle while at a sighting of a dangerous animal;
- Vehicles must be designed and built to ensure visitor safety at all times, especially from wild animals;
- An overhead cover for rain, sun, dust, wind and cold is advised; and
- Protection of guests must be provided on the sides of the vehicle where appropriate.
- When travelling in the park (outside the concession area), the game drive vehicle must comply with standards of "open vehicles" allowed in parks, i.e. it must be equipped with canvas sides, roof and the front window upright, i.e. similar to night drive vehicles used in parks.

SANParks will provide the Operator with a detailed "Operations Manual" prior to the commencement of the Operational Phase, which will contain all relevant standards and codes of conduct in force at that time. SANParks may update this Operations Manual as needed, and will provide the Operator with updated copies of the Manual in due course.

2.14.2 Other vehicles

Only designated Operator game drive vehicles and SANParks management vehicles are permitted on game viewing tracks. All other Operator vehicles must remain on the main designated arterial access route(s) or official public roads within the National Parks.

2.15 Operator Activities

The primary guest activities for all Management Areas will be accompanied game drives (both during the day and at night) and guided walks. The Operator shall indemnify SANParks against any liability in the event of an accident or other incident involving a guest to the Management Area.

2.15.1 Game Drives

Game drives are only permitted on designated tracks within the Management Area (see section 2.10 above). The general public road network is available for use by the Operator, but normal SANParks rules and regulations will apply to drives on these roads. Within Management Areas, the following rules shall apply:

- Driving after dark is permitted in agreed areas up to 22:00. Driving later than this time requires SANParks approval;
- Guests may not alight from the vehicle. Should they wish to do so, this must be done with the concurrence of the Guide, and the Guidelines for Walks (see section 2.15.4) will then apply to this activity. Guides must ensure the group is not visible to other Park users;
- Guests may not stand up while driving or at game sightings;
- Only Operator staff are permitted to sit or track on the 'tracker seat' located on the bonnet, and they must move inside the vehicle when approaching dangerous game;
- Noise levels on a drive must to be kept to a minimum and controlled by the Guide;
- Calling of any nature, baiting or any other activity the purpose of which is to attract animals' attention is not permitted;
- Guides must have attained Field Guides Association of South Africa (FGASA) Level 1 standard (or an equivalent qualification, as agreed by SANParks).

2.15.2 Sighting Procedures

The following procedures must be observed at sightings in a Management Area:

- Only one vehicle may move into, around, or away from a sighting at any one time;
- The Guide who first arrives at a sighting will take charge and control of the sighting, and will hand over to another Guide upon leaving the sighting;
- A maximum of three vehicles is permitted at a sighting at any one time;
- Escape routes from the sighting must be assessed before entering;
- All animals must be regarded as potentially dangerous and caution must be observed at all times;
- Sighting must be approached in the appropriate gear;
- Guests may not remove or damage vegetation or artefacts; and
- Areas where guided walks may be being conducted must be avoided.

2.15.3 Off-road driving

Off-road driving is prohibited in Management Areas where information currently available indicates that impacts will be unacceptably high, such as the Kgalagadi Transfrontier Park.

2.15.4 Walks

Walking excursions with guests must comply with the following standards:

- These are permitted anywhere within the Management Area, although specific provisions may vary depending on the Park in question;
- Guides must have attained FGASA level 3 SKS ('dangerous game') qualifications, or an equivalent qualification, as agreed by SANParks;
- The Guide must carry a rifle of a minimum caliber of .375, which must be loaded with suitable ammunition. The Guide also must carry a minimum of 10 rounds of additional ammunition;
- The maximum number of guests on a trail may not exceed eight guests plus two Guides, or a total of 10 (ten) people. If an Operator wants to utilise additional staff on any given walk, the number of guests must be decreased commensurately. One of the Guides must have attained FGASA level 3 (or an equivalent qualification as agreed by SANParks); the other must have extensive local knowledge of the area, be competent to handle the firearm carried by the main Guide, be able to utilise the radio, and be trained in basic medical first aid;
- All trailists must sign an indemnity form before proceeding on a trail and dangers and safety procedures must be explained to all trailists;
- Walking is only permitted between sunrise and sunset; and
- Dangerous game may not be tracked.

Please note: The carrying of a firearm in a national park is subject to approval from the Chief Executive Officer: SANParks, and a permit issued.

2.15.5 Campfires

No natural resources may be collected and used within any National Parks without written approval from SANParks. Specifically in this regard, the collection of firewood for campfires, cooking or any other use is not permitted. If firewood is brought in from outside it should comply with policies that may be in place for different National Parks. Some National Parks only permit the use of cleared alien vegetation from approved clearing operations to be used for fires. Campfires and/or gas cookers will be allowed only in designated areas and at specified times, as agreed to by SANParks in writing.

2.15.6 Monitoring of Compliance with Codes of Conduct

Operators must take reasonable steps to ensure that guests are aware of all provisions and standards of performance (especially those discussed in sections 2.14 and 2.15). This shall be done by posting these standards in guest rooms and in other areas where they will be visible to guests. SANParks will provide a letter to guests welcoming them to the Park and advising them

of relevant Park rules and regulations. Provision must be made for guests to report to the Operator and SANParks on their experiences while visiting the Park and Management Area. This may be accomplished by providing an evaluation form and requesting all guests to complete this form before they depart. Both SANParks and the Operator will review comments received in this manner.

2.15.7 General guest safety

The Operator must have an emergency medical evacuation policy that covers both guests and staff in the event of a serious injury or acute medical emergency. Relevant staff must be trained in and aware of this policy.

All buildings, vehicles, machinery and other structures including their operation must comply with the relevant legislation and standards in the Republic of South Africa.

The Management Areas are located in areas where dangerous animals occur and design, construction and layout of the facilities must bear this in mind.

2.15.8 Other activities

Operators wishing to fund and/or undertake research projects within the Management Area must first obtain approval for the project and all of its details from Park management and the SANParks Scientific Services Department. Any commercial wildlife filming that takes place in the Management Area is governed by SANParks' filming policy, and must be undertaken after discussions with and approval of SANParks. SANParks will consider the use of Web cams within Management Areas within the framework of SANParks' agreement with Africam or any other similar or substitute service provider.

SANParks will permit Operators to undertake any necessary security precautions in the Development Site and its immediate surroundings. Security in the rest of the Management Area, e.g., against poachers, is the responsibility of Park personnel. Operators will be expected to report any poaching activity or other incursions into the Management Area to the appropriate Section Ranger.

2.16 Monitoring

All of the issues discussed and described in this document will require monitoring. SANParks reserves the right to monitor all these issues according to the standards set out in these Guidelines, the findings of the EIA, and/or in a manner agreed between the parties as the process develops.

SANParks reserves the right to undertake all conservation management activities -- including monitoring, culling, capture, and research -- in all of the Management Areas. Where such activities have been adversely impacted by an Operator's activities, any additional costs to SANParks resulting from these impacts shall be borne by the Operator. Should the adverse impacts be of a level unacceptable to SANParks, the Operator will be considered in material breach of the contract and SANParks will have the right to terminate the contract with immediate effect.

If certain Management Area standards are difficult to determine at present, SANParks will, in conjunction with the Operator, facilitate the establishment of an Operators' forum. This forum will establish a process whereby standards of performance, within thresholds of acceptable change can be discussed and agreed to (issues might include, for example, gate opening and closing times; modifications to SANParks game drive vehicle standards; routine infrastructure issues associated with waste disposal, etc.). The Operator must comply with any standards thereby agreed established.

Annex D: Example of an Environmental Management Plan

ISSUE	ACTION	RESPONSIBILITY <i>ECO to take responsibility for monitoring implementation</i>
PLANNING AND PRE-CONSTRUCTION PHASE		
Water and drainage		
<ul style="list-style-type: none"> ▪ Storm water and run-off control ▪ Water use 	<ul style="list-style-type: none"> ▪ Ensure adequate provision is made in the planning phase for storm water management. ▪ Ensure construction workers are educated as to the need for practising water conservation. 	<ul style="list-style-type: none"> ▪ Contractor ▪ Architect
Vegetation		
<ul style="list-style-type: none"> ▪ Red data species ▪ Large trees 	<ul style="list-style-type: none"> ▪ The final pegging of the site must be assessed by the ECO to reconfirm that there are no red data species (Euphorbia) in the way of the actual footprint. The Euphorbias must be fenced off. Tree roots should also be taken into account when pegging out the footprint. ▪ As far as is reasonably possible, no large (>1.5m) trees are to be removed for construction purposes, branches should rather be trimmed and decks built around trees. No <i>Boscia albitrunca</i> to be touched. ▪ The routing of the access road is to avoid any large trees and minimise damage to vegetation generally, whilst taking contours and drainage lines into account as required. 	<ul style="list-style-type: none"> ▪ Contractor ▪ Architect
Fauna		
<ul style="list-style-type: none"> ▪ Red data species ▪ Protection of animals 	<ul style="list-style-type: none"> ▪ Ensure during pegging and prior to construction that there are no small animal burrows or nests in evidence that will be destroyed by the development or have their breeding disrupted. 	<ul style="list-style-type: none"> ▪ Contractor ▪ Architect
Soil		
<ul style="list-style-type: none"> ▪ Soil suitability ▪ Erosion 	<ul style="list-style-type: none"> ▪ Areas that are prone to erosion due to soil type or gradient should be noted and, if necessary, demarcated during the planning and design phase. 	<ul style="list-style-type: none"> ▪ Architect ▪ Contractor
Building Materials		
<ul style="list-style-type: none"> ▪ Deforestation ▪ Contamination 	<ul style="list-style-type: none"> ▪ Only timber from certified sources may be used for construction purposes. This should be CCA treated if needed and creosote should not be used. ▪ All building materials that are to be used must be environmentally friendly and non-toxic. 	<ul style="list-style-type: none"> ▪ Architect ▪ Contractor
Visual and Aesthetic		
<ul style="list-style-type: none"> ▪ Visual impact 	<ul style="list-style-type: none"> ▪ The skyline must not be broken by buildings at any point, and these are to be situated so as to be as visually unobtrusive as possible. 	<ul style="list-style-type: none"> ▪ Contractor ▪ Architect
Access		
<ul style="list-style-type: none"> ▪ Access 	<ul style="list-style-type: none"> ▪ The access track to the site needs to be routed so as to skirt drainage lines and depressions, take contours into account, avoid large trees and keep to the old military track and elephant path wherever possible. Drainage and the control of runoff to prevent erosion must be considered. ▪ Road and foot access to and on the site for planning and construction purposes will be strictly via agreed tracks/paths 	<ul style="list-style-type: none"> ▪ Contractor ▪ Architect

	only. A turn-around area for large vehicles needs to be demarcated and prepared so that undue damage does not result. Nothing larger than a 5-ton truck may be used to access the site.	
	Site Planning and Management	
<ul style="list-style-type: none"> ▪ Implementation of EMP and construction guidelines 	<ul style="list-style-type: none"> ▪ Prior to commencement of construction, the site must be assessed and the footprint of the development, including pathways, must be carefully pegged. All parties must be clear on the content and implications of the EMP and construction guidelines (including construction workers). The ECO should play a role in this and ensure that parties are furnished with any additional information they may require in order to assist them in this regard. ▪ Soil suitability tests are to be conducted by an engineer. This will indicate 'no go' areas in respect of construction or may indicate that special stabilisation measures need to be taken in certain areas or that facilities need to be repositioned in the landscape. 	<ul style="list-style-type: none"> ▪ Contractor ▪ Architect ▪ ▪
CONSTRUCTION PHASE		
	Heritage	
<ul style="list-style-type: none"> ▪ Conservation of cultural resources 	<ul style="list-style-type: none"> ▪ Should any new archaeological artefacts or evidence be discovered at any stage during construction or operation then the relevant authority and experts must be alerted immediately and all necessary measures must be taken not to damage these, including halting construction. 	<ul style="list-style-type: none"> ▪ Architect ▪ Contractor
	Water Use	
<ul style="list-style-type: none"> ▪ Compliance ▪ Conservation 	<ul style="list-style-type: none"> ▪ Water conservation measures must be taken wherever possible. ▪ Special care must be taken to ensure that surface and ground water are not contaminated during construction, either through run-off from mixing areas, roads or cleared areas, or through other means of contamination. 	<ul style="list-style-type: none"> ▪ Architect ▪ Contractor
	Vegetation	
<ul style="list-style-type: none"> ▪ Protection of vegetation 	<ul style="list-style-type: none"> ▪ Should the presence of any red data or endemic species become apparent within the building envelope at any point during the construction phase, these plants should be translocated by a suitably qualified person or left in situ but fenced to protect them during construction. ▪ Care should be taken during construction to limit damage to the roots of any plants. 	<ul style="list-style-type: none"> ▪ Architect ▪ Contractor
	Alien and Invasive Plants	
<ul style="list-style-type: none"> ▪ Alien infestations and contamination 	<ul style="list-style-type: none"> ▪ Care should be taken to avoid the inadvertent introduction of alien and/or invasive species during the construction period. Any such plants should be removed immediately. 	<ul style="list-style-type: none"> ▪ Contractor
	Aesthetic and Visual	
<ul style="list-style-type: none"> ▪ Visual impact 	<ul style="list-style-type: none"> ▪ All lighting will be appropriately placed, shielded and diffused to limit to the greatest possible extent any light pollution emanating from the development. 	<ul style="list-style-type: none"> ▪ Architect ▪ Contractor
	Fire	
<ul style="list-style-type: none"> ▪ Human safety ▪ Enviro protection 	<ul style="list-style-type: none"> ▪ The development is not considered to constitute an undue fire hazard. All normal safety precautions will be taken and insurance provisions will be adhered to. 	<ul style="list-style-type: none"> ▪ Architect ▪ Contractor
	Soil conservation	
<ul style="list-style-type: none"> ▪ Prevention of erosion and compaction 	<ul style="list-style-type: none"> ▪ It is important that adequate measures are taken to prevent water runoff from concentrating in any one area, to prevent the compaction of soil through excessive heavy vehicle passage over it, and to prevent the destruction of protective vegetation. ▪ Where water flows around an obstruction, steps must be taken to break the flow of water and spread it out into the 	<ul style="list-style-type: none"> ▪ Contractor ▪ Architect

	<p>receiving area so that erosion channels do not form.</p> <ul style="list-style-type: none"> ▪ Where runoff from an elevated portion of the building is concentrated, then measures must be taken to break the fall of this water onto the ground so that splash erosion does not occur. ▪ Movement between different parts of the development will be on boardwalks, these will be constructed with the control of runoff in mind. ▪ Implementation of anti-erosion measures such as the construction of berms to reduce water velocity may be necessary in steep areas. ▪ Only clear areas immediately prior to construction and rehabilitate as soon as possible. ▪ Storm water runoff must be taken account of during planning and its flow controlled on the construction site. ▪ It is recommended that all soil excavated during trenching be stockpiled in layers and protected by berms. It is also imperative that the topsoil layer be retained and re-used. ▪ Trench areas must be raised to accommodate the bulking factor and subsidence. ▪ Construction during the rainy season (November to March) should be carefully controlled or avoided if possible. ▪ Any gravel or stone that may be required for building purposes (including roads) must be obtained from environmentally acceptable and legally permitted sources. 	
Construction Plan		
<ul style="list-style-type: none"> ▪ Mitigation of construction impacts 	<ul style="list-style-type: none"> ▪ The sequencing of construction events is an important part of managing any potentially negative impacts arising from the construction phase: ▪ The site should be demarcated and proposed structures and routes pegged for approval by ECO and any other relevant parties if required. ▪ Suitably positioned stock piling and mixing areas should be chosen and demarcated and these should be secured to prevent run-off from them contaminating the ground and water resources. ▪ Clear access routes from the stockpiling areas to the relevant portions of the building sites should be demarcated and only these should be used. Either the boardwalks should be constructed first and used, or planks should be laid for ease of movement and added protection. 	<ul style="list-style-type: none"> ▪ Contractor ▪ Architect
Construction Guidelines		
<ul style="list-style-type: none"> ▪ Management of construction activities 	<ul style="list-style-type: none"> ▪ The contractor must ensure the proper supervision of employees at all times and their abidance by the conditions of this plan. ▪ All employees must be educated to the need to refrain from the destruction of plants and animals (including snakes), setting of snares, as well as from indiscriminate defecation, waste disposal and or pollution of soil and water resources. ▪ There will be no vehicle access to the actual building site. Other vehicles (nothing larger than 5-ton truck) must receive clear instructions to remain within demarcated access route and operational areas. Penalties should be enforced if this arrangement is not adhered to. ▪ All mixing of cement and other building materials should be done in such a way that it is properly contained in a bermed area and that contaminated water may not run off and allowed to contaminate the area. ▪ Any petrol, diesel and chemicals must be stored in an enclosed and secure place where leakage can be contained and environmental contamination will not result. Should such contamination occur, it must be treated through on-site bioremediation. ▪ The building envelope shall be demarcated to ensure that building activities are contained within its perimeter and that no 	<ul style="list-style-type: none"> ▪ Contractor ▪ Architect

	<p>undue environmental damage or disturbance occurs outside of this perimeter.</p> <ul style="list-style-type: none"> ▪ The Contractor is to take all precautions to prevent the outbreak and spreading of fires and is to ensure all his employees are aware of the necessary precautions to be taken. ▪ All earthworks, berms and channels, spoil and borrow areas are to be worked in such a way as to minimise the possibility of erosion. All excavations by hand only. ▪ On-site chemical toilets will be used by the Contractor and waste collected in these will be disposed of regularly at a permitted location and in an environmentally appropriate manner. 	
<ul style="list-style-type: none"> ▪ Management of construction activities 	<ul style="list-style-type: none"> ▪ The Contractor will provide a suitable, animal proof receptacle to contain all daily refuse. Refuse and will be disposed of regularly at a suitable permitted location and in an environmentally appropriate manner. Any illegal dumping will be penalised. ▪ The Contractor (and that of suppliers) will ensure that all equipment is in good working order and will not contaminate air, soil or water resources with diesel, petrol or any other foreign substances. ▪ All building materials will be stockpiled in the designated area(s) within the building envelope. ▪ All building rubble is to be removed from the site and disposed of at a permitted site. Any illegal dumping will be penalised. ▪ The contractor must ensure that arrangements are made for construction workers to be transported to and from site on a daily basis as construction workers will not be permitted to stay on or near the site overnight. It is likely that construction workers will be accommodated at the existing staff accommodation facilities at the main lodge and/or that the new accommodation block will be built first and used. ▪ Ensure that all necessary dust suppression measures are taken and that soil is not left exposed for any length of time. Building materials such as sand must be covered during transport. ▪ Ensure Contractors are in possession of a suitably stocked First Aid kit for the treatment of any on-site injury. 	<ul style="list-style-type: none"> ▪ Contractor ▪ Architect
OPERATIONAL PHASE		
	Water management	
<ul style="list-style-type: none"> ▪ Water conservation 	<ul style="list-style-type: none"> ▪ Water recycling and storm water management will have been incorporated during the design phase. The efficacy of these should be assessed, and where necessary, improvements should be made. ▪ The borehole pumps to be used for water abstraction should be enclosed by low bund walls. These bund walls are required to intercept fuel and oil leakage and prevent spillage and contamination of soil and surface and ground waters. ▪ Water tanks must be appropriately located and screened to reduce visual impact. ▪ High quality, robust plumbing systems should be installed in all areas, including staff areas. ▪ Water savings devices can reduce shower and tap water-use by between 20 and 60%. Suitable fittings should therefore be included in the design of infrastructure. Low flush or dual flush cisterns and low-flow showerheads are therefore recommended. Fittings should also be selected based on the hardness of the water as if calcification or scaling is a problem, showerhead fittings with small holes will quickly become blocked. (The ideal value for hardness of water should be between 50 - 100 mg/l CaCO₃). 	<ul style="list-style-type: none"> ▪ Contractor ▪ Operator
	Waste Management	

<ul style="list-style-type: none"> ▪ Soil and water pollution ▪ Health ▪ Animal safety 	<ul style="list-style-type: none"> ▪ All waste is to be separated at source. ▪ All waste containers will be housed in the service areas and will be fenced, covered and secured. The service area will have a concrete floor to ensure that it can be suitably maintained and no ground seepage will occur. ▪ Glass will be stored on site in suitable containers until there is sufficient to be transported for recycling. ▪ Tins, cans and foil will be stored on site in suitable containers until there is sufficient to be transported for recycling. ▪ Plastics will be stored on site in suitable containers until there is sufficient to be transported for recycling. ▪ Paper and cardboard may be stored on site in suitable containers until there is sufficient to be transported for recycling. ▪ Waste food will be separated and stored in suitable containers for collection by a local pig farmer on a regular basis. Alternately, it may be disposed of at the permitted waste site. ▪ Any waste that cannot be recycled or sold must be disposed of at a permitted waste site. 	<ul style="list-style-type: none"> ▪ Contractor ▪ Operator
Visual and Aesthetic		
<ul style="list-style-type: none"> ▪ Sense of place 	<ul style="list-style-type: none"> ▪ All buildings must be maintained in good repair. ▪ They should remain 'finished' in unobtrusive colours and surfaces that blend into the environment. 	<ul style="list-style-type: none"> ▪ Contractor ▪ Operator
Fire		
<ul style="list-style-type: none"> ▪ Danger to human and animal life ▪ Compliance 	<ul style="list-style-type: none"> ▪ The development is not considered to constitute an undue fire hazard. All normal safety precautions will be taken during the operational phase and all SABS regulations will be followed. Fire fighting equipment will be available and easily accessible as required and will be satisfactorily maintained. 	<ul style="list-style-type: none"> ▪ Operator
Storage of goods and hazardous materials		
<ul style="list-style-type: none"> ▪ Contamination ▪ Health 	<ul style="list-style-type: none"> ▪ The bulk of provisions will be stored at the main lodge. ▪ Hazardous substances (fuel, including fuel stored in drums, oils, paints, pesticides, herbicides, batteries) should be stored on a concrete base and shall be covered by a roof to prevent exposure to heat and/or direct sunlight and rain. A register should be kept of them. ▪ The concrete base used to store hazardous substances should be surrounded by a bund wall that can contain 110% of the contents of the substances stored on that base. ▪ Areas designated for storage of hazardous chemicals shall be isolated from other activities and should be clearly marked with appropriate symbolic safety signs. ▪ The hazardous substances facility shall be fenced to prevent access by the public, non-designated staff and wildlife. 	<ul style="list-style-type: none"> ▪ Operator
Fauna		
<ul style="list-style-type: none"> ▪ Conservation of biodiversity 	<ul style="list-style-type: none"> ▪ Small animals and birds that may be disturbed during construction will return to the site once construction is complete. Staff and visitors must be educated (if needed) as to the need to refrain from harming or bothering any animals on site. 	<ul style="list-style-type: none"> ▪ Operator
Maintenance and cleaning materials		
<ul style="list-style-type: none"> ▪ Contamination 	<ul style="list-style-type: none"> ▪ Only environmentally friendly wood oil to be used for treating timber. ▪ Non-toxic environmentally friendly products to be used for maintenance work around the lodge. ▪ As far as possible, organic biodegradable products are to be used for cleaning purposes and for supplying guests with (shampoo, soap, etc). 	<ul style="list-style-type: none"> ▪ Operator
Sewage		
<ul style="list-style-type: none"> ▪ Soil and water pollution 	<ul style="list-style-type: none"> ▪ The sewage system must be properly maintained at all times with regular checks for blockages or leaks of any sort and to 	<ul style="list-style-type: none"> ▪ Operator

<ul style="list-style-type: none"> ▪ Health and Safety 	<p>ensure that outflow meets DWAF discharge standards at all times.</p>	
DECOMMISSIONING PHASE		
	Buildings and Equipment	
<ul style="list-style-type: none"> ▪ Human and animal safety ▪ Soil and water pollution ▪ Visual and aesthetic impacts 	<ul style="list-style-type: none"> ▪ All structures will be completely removed to the satisfaction of the Section Ranger. ▪ Contractor's regulations will apply during this phase to ensure that this phase of operations is properly managed and limited environmental impact results. 	<ul style="list-style-type: none"> ▪ Contractor
	Vegetation	
<ul style="list-style-type: none"> ▪ Soil erosion ▪ Alien plant invasion 	<ul style="list-style-type: none"> ▪ The site will be suitably revegetated or if this is not appropriate then it will be covered with scrub to ensure that soil erosion does not result and to provide protection for reseeded vegetation. ▪ Follow ups will be done to ensure that alien or invasive plants and weeds have not flourished. 	<ul style="list-style-type: none"> ▪ Landscaper ▪ Contractor