Development of a SADC Guideline on cross-border tourism products in TFCAs

SADC TFCA cross-border tourism product Situational Analysis Report

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Acronyms

ATTA	Advancing Tourism to Africa
ASA	Association of Eastern and Southern Africa
CITW	Children in the Wilderness
DEA	Department of Environmental Affairs, South Africa
EMP	Environmental Management Plan
FANR	Food, Agriculture and Natural Resources
FTT	Fair Trade Tourism
GBP	British Pound
GIZ	German International Cooperation
GLTP	Great Limpopo Transfrontier Park
JMB	Joint Management Board
KAZA	Kavango Zambezi Transfrontier Conservation Area
M&E	Monitoring and Evaluation
MoU	Memorandum of Understanding
MTB	Mountain bike
n=	Number of respondents in survey
NGO	Non Governmental Organisation
NWR	Namibia Wildlife Resorts
PPF	Peace Parks Foundation
RDC	Rural District Council
RETOSA	Regional Tourism Organization of Southern Africa
SADC	Southern Africa Development Community
SANParks	South African National Parks
TAPAS Group	IUCN World Commission on Protected Areas Tourism and Protected Areas Specialist Group
TFCA	Transfrontier Conservation Area
TFPD	Transfrontier Parks Destinations
ToC	Table of Contents
TP	Transfrontier Park
TUPNR	Transboundary Use and Protection of Natural Resources Programme
USD	United States Dollar
VAT	Value Added Tax
ZimParks	Zimbabwe Parks and Wildlife Management Authority

1   EXECUTIVE SUMMARY

This Situational Analysis Report (SAR) provides a review of cross-border tourism products within Transfrontier Conservation Areas (TFCAs) in the Southern African Development Community (SADC). For the purposes of this report, cross-border tourism products refer to (a) annual or bi-annual events and (b) other cross-border tourism products with more regular departure dates that are made possible by existing TFCA structures. Therefore, the focus is not on cross-border events or tours that use existing formal immigration facilities between countries. The purpose of the SAR is to inform the development of guidelines for the development of cross-border tourism products in TFCAs.

The report was compiled through a combination of literature review, stakeholder consultation, and review of the draft analysis. Information presented includes the status of existing cross-border tourism products in SADC TFCAs. This includes the prevailing enabling environment, governance arrangements, financial elements, and issues relating to their quality, marketing and sustainability. An overview on the processes used to establish cross-border tourism products is provided, in addition to a review of what has worked well, and what could have been improved. The discussion incorporates lessons learned, opportunities for additional and scaled-up products, the needs for specific tools and guideline content, and also option for dissemination and training.

The analysis has led to a series of recommendations that are relevant for different stakeholders including the SADC Technical Committees on Wildlife and Tourism,, TFCA managers and TFCA Joint Management Boards, cross-border tourism product operators and the SADC TFCA Network Tourism Community of Practice. These recommendations are drawn directly from the main report, and summarised here for consideration and future phases of planning by each group.

1. Recommendations for consideration by the **SADC Technical Committees on Wildlife and Tourism**:[1]

- **Allow free movement of tourists, staff and equipment within a TFCA**, with exemption for immigration and customs (i.e. create TFCA free trade zones).
- **Scale up the univisa from Zimbabwe/Zambia to the KAZA TFCA, and then SADC,** through improved collaboration within SADC, to allow unfettered access for TFCA tourists between countries. Address issues of security of movement within TFCAs through this process.
- Investigate option to **delegate authority to protected area staff, to perform official services** (e.g. immigration), with associated training and resources.
- **Establish tourist-only border crossing points,** to reduce congestion among freight and tourist traffic.
- **Establish TFCA exemptions** for immigration, import/export duties, and movement of labour. Understand that the supplies and labour are used for cross-border tourism products, for a limited period of time, and will not remain in other countries.
- **Establish TFCA work permits**, to allow guides, drivers and tour operators to work freely within and between TFCAs, cognizant of sovereignty concerns. Standardize minimum requirements and guide fees within TFCAs.
- **Establish single pay-points at TFCA 'gateways' with a smart-card fee/levy/tax management system.** Simplify the broad range of fees that tourists pay for vehicle taxes, park gate fees and tolls, which create stress and cause delays for tourists.[2] For example, a single TFCA entrance fee, valid for all countries.
- **Reduce costs,** including visa fees and conservation fees (particularly double-park entry fees) which cumulatively are costly and numerous. [3]

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[1] For background and justification, refer to sections 5.3, 6.4, 7.3 and 9.3
[2] Boonzaaier, W. V., Young, A., Attwell, B., and Lombard, D. (2013) Kavango Zambezi Transfrontier Conservation Area (KAZA-TFCA) – Harmonisation of natural resource management and tourism, Contour Project Managers cc & Associates, May 2013
[3] Adapted from O'Leary, G. (2014) Operating in the TFCAs: The voice of experience, Presentation at the Conference on Guidelines on concessioning and sustainable tourism investment in TFCAs in SADC, Garden Court OR Tambo, South Africa, 2-3 September 2014

- **Provide incentives** to tour operators offering cross-border tourism product and itineraries (and investigate types of incentive that would be most effective.)
- Support a **common marketing strategy** through Boundless Southern Africa[4] for TFCAs to promote nature-based tourism.
- **Improve destination promotion** for TFCAs in SADC to raise awareness among travellers and tour operators, through a variety of channels including website, social media, newsletters etc.

2. Recommendations for consideration by **TFCA managers and Joint Management Boards (JMBs):[5]**

- **Establish strong decentralized institutional frameworks for TFCAs,** and delegate and devolve responsibility for cross-border tourism product preparation and organization for practicality. Give champions, leaders and drivers (and those who have the capacity and knowledge) authority they require to organize successful cross-border tourism products:
    - o **Delegate responsibility** to perform immigration services to protected area officials in TFCAs, with appropriate training.
    - o **Build responsibility and management for cross-border tourism products into the terms of reference for TFCA and security cluster staff**.
    - o **Create "tourism officer" positions,** either for all TFCAs, or for individual TFCAs. Tourism officers (with adequate skill and capacity) could act as 1-stop-shop facilitators of new and operational tourism events, cross-border tourism products, investors, concessionaires, and tour operators using TFCAs in their itineraries.
    - o **Establish a single point of contact for cross-border tourism product developers,** including coordination of permissions and processes**.** (This can be a contact point for other tourism in the TFCA – not just cross-border tourism products).
- **Integrate cross-border tourism products into protected area management plans**, and associated tourism plans.
- **Recognize that the private sector can be partners, not adversaries**, in the establishment of mutually-beneficial cross-border tourism products:[6]
    - o **Agree on accountability for communication and coordination processes,** including how decisions are taken (i.e. by whom, and within what timeframe).
    - o **Recognise that not all positive and negative impacts are financial**, and some are difficult to monitor (e.g. reducing social grants, sales and taxes). [7]
- **Provide concession or license periods** for cross-border tourism product development and operation, using the 2014 SADC TFCA tourism concession guidelines as a process:
    - o **Provide clear guidance on the types of contractual arrangements** that are allowable for cross-border tourism products (e.g. PPPs, permits, MoUs including their time period etc.), and establish these.
    - o **Establish permissions for a product, rather than a specific event or tour occurrence**, so that new applications for the same permissions are not required each time.
        - ▪ For **new cross-border tourism products**, design a tender process offering different types of product opportunities to the market, and invite proposals. Use confidential meetings with project proponents to explore and discuss project concepts, in order to protect intellectual property, and vet the concept with pre-established criteria.
        - ▪ For **existing cross-border tourism products**, establish a multi-year permit option, whereby they can repeat the event over time, without applying for all permissions every year. Given their intellectual property in the product, incorporate a negotiation process and agreement, that allows operators to retain their proprietorial information, rather than taking the concept to open tender. Applications could be approved by the TFCA-Joint Management Board – Council of Ministers for (say) 5 years.

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[4] See Box 1 on Boundless Southern Africa
[5] For background and justification, refer to sections 5.3, 6.4, 7.3 and 9.3
[6] O'Leary, G. (2014) op. cit.
[7] Adapted from O'Leary, G. (2014) Op cit.

- **Maintain a clear record** of decisions made, permission requests submitted and decisions made (i.e. a clear paper trail), within the TFCA structure (e.g. the JMB):
  - o **Develop Standard Operating Procedures** for cross-border events for each TFCA, and ensure approval by JMBs.
  - o **Establish cross-border tourism product proposal forms** that indicate the types of benefits and costs that need to be monitored and reported.
  - o **Establish financial M&E templates** that track the resources invested in cross-border tourism product development and operation by government, including financial and in-kind contributions.
- **Establish multi-stakeholder engagement forums**, such as TFCA committees at concept stage to mitigate barriers and promote partnerships.
- **Develop sustainable financing strategies for TFCAs** and cross-border tourism products:
  - o **Reduce costs,** including conservation fees (particularly double-park entry fees) which cumulatively are costly and numerous to the private sector and visitors. [8]
- **Build capacity for marketing** and promoting nature-based tourism in TFCAs.
  - o Promote **collaborative marketing and promotion** by TFCA cross-border tourism products by pooling client databases (e.g. by protected area authorities).

Recommendations for consideration by **cross-border tourism product developers & operators** include:[9]

- **Establish clear ownership of cross-border tourism products**, including the intellectual property, and also equipment and tenure (i.e. permit or concession period).
- **Agree on accountability for communication and coordination processes,** including how decisions are taken (i.e. by whom, and within what timeframe).
- **Maintain a clear record** of decisions made, permission requests submitted and decisions made (i.e. a clear paper trail), within the TFCA structure (e.g. the JMB).
- **Undertake supply-chain assessments for cross-border tourism products,** to understand the current availability of goods and services in local areas, and establish efficient and effective plans for sourcing (i.e. prioritizing local procurement where practical), and plan interventions to improve local supply.
- **Establish clear plans for benefit sharing during product preparation,** including:
  - o who benefits from revenues and profits;
  - o who is responsible for payment of costs during planning and operation;
  - o how operational expenditure is allocated between countries and service providers;
  - o how benefits are distributed, and on what basis;
  - o a clear and agreed monitoring and reporting framework.
- Promote **collaborative marketing and promotion** by TFCA cross-border tourism products by pooling client databases (e.g. by protected area authorities).

3. Recommendations for consideration by the **SADC TFCA Network Tourism Community of Practice include:[10]**

- **Review the long-term goals and 'desired state' of cross-border tourism in TFCAs.**
- **Prepare a detailed review of policy and legislative issues for each TFCA.** Establish an interactive document that simplifies these, with hyperlinks to current protocols and policies.
- **Organise a series of national workshops on cross-border tourism to unpack the guidelines are relevant to each SADC country.**
- **Support dissemination of the guideline electronically** (e.g. via email, internet, intranet) to:
  - ➢ All relevant TFCA practitioners and stakeholders.

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[8] Adapted from O'Leary, G. (2014) Operating in the TFCAs: The voice of experience, Presentation at the Conference on Guidelines on concessioning and sustainable tourism investment in TFCAs in SADC, Garden Court OR Tambo, South Africa, 2-3 September 2014

[9] For background and justification, refer to sections 6.4 and 9.3

[10] For background and justification, refer to sections 5.3, 12.3 and 12.4

> ➤ Protected area managers and their agencies, including TFCA managers.
> ➤ RETOSA board members.
> ➤ Tourism agencies, including national tourism boards.
> ➤ Tourism and business associations.
> ➤ Lodges and tour operators working in TFCAs.
> ➤ NGOs working in communities in and around TFCAs.
> ➤ Communities and community projects and organizations.
> ➤ Border posts and immigration officials.
> ➤ Visitor centers and tourism information offices.
> ➤ Social media and internet-based platforms (e.g. SADC website).

The analysis also provides a series of recommendations for the **SADC Guideline for cross-border tourism**, as follows:[11]

- Ensure that **text that is concise, user-friendly and easy to adopt, with little jargon**.
- Provide information on **processes for obtaining permissions from government authorities** and guidance on border crossings and regulations.
- **Provide guidance on the types of contractual arrangements** that are allowable for cross-border tourism products (e.g. PPPs, permits, MoUs including their time period etc.), and establish these.
- Include **templates for cross-border tourism product proposal forms, feasibility studies, standard operating procedures, and M&E templates,** adapted from examples.
- Provide **information on funding** accessible to integrate community partners, or training community staff for cross-border tourism products.
- Include **processes and options for community benefits**, including guidance for best practices in community beneficiation; identification of beneficiaries; how community members can develop/share/fund ideas; gender and youth; and managing expectations.
- Provide **information on sustainability**, including environmental outcomes of cross-border tourism products.

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[11] For background and justification, refer to sections 5.3, 6.4, 7.3, 12.3 and 12.4

2   INTRODUCTION

2.1   BACKGROUND

The German International Cooperation (GIZ) supports the Food, Agriculture and Natural Resources (FANR) Directorate of the Southern African Development Community (SADC) in the implementation of SADC protocols and strategies for natural resource management, including the development of Transfrontier Conservation Areas, through the SADC/GIZ Project "Transboundary Use and Protection of Natural Resources Programme (TUPNR)".

In order to operationalise the implementation of the Protocol on Wildlife Conservation and Law Enforcement with regard to Transfrontier Conservation Areas (TFCAs), SADC developed the SADC Programme for TFCAs in 2013. The overall programme goal is to promote SADC as a model of community centred, regionally integrated and sustainably managed network of world-class transfrontier conservation areas. In the SADC Regional Indicative Strategic Development Plan and Component 7 of the SADC TFCA Programme, TFCAs have been identified as potential instruments for promoting regional integration, collaborative tourism and rural development.

In 2016 the SADC TFCA Network identified the need for guidelines on cross-border tourism products in TFCAs. Cross-border tourism products refer to (a) annual or bi-annual events and (b) other cross-border tourism products with more regular departure dates that are made possible by existing TFCA structures. Therefore, the focus is not on cross-border tour itineraries, which use existing formal immigration facilities between countries.

This draft 'SADC TFCA cross-border tourism product overview' aims to provide a situational analysis of existing cross-border tourism products in TFCAs in southern Africa (Deliverable 2), to inform the development of the guidelines.

3   APPROACH

The methods used in developing the situational analysis included a literature review and a multi-faceted stakeholder consultation approach.

3.1   LITERATURE REVIEW

Existing guidelines and case studies in transfrontier and sustainable tourism were reviewed to ensure that the report incorporated international best practices. Policy and planning documents that provide the regional context of tourism development in TFCAs were also reviewed (e.g. SADC Regional Indicative Strategic Development Plan, SADC TFCA Guidelines, product and attraction inventories for TFCAs, tourism plans for TFCAs). Furthermore, an online review was made of existing cross-border tourism products in SADC TFCAs, including TFCA events and products with more regular departures.

3.2   STAKEHOLDER CONSULTATION

The consultation stage incorporated a combination of interviews (face-to-face and by telephone), email consultation, online surveys, a 2-day expert workshop, and a validation workshop. This section describes the process of stakeholder identification, consultation tool development and use, and the workshops.

3.2.1   STAKEHOLDER IDENTIFICATION

In collaboration with members of the SADC TFCA Network and its Tourism Community of Practice, a stakeholder consultation database was developed relating to TFCA tourism products and key stakeholders including institutional and contact details. To identify international tour operators, an online search was conducted for operators promoting 'transfrontier' or 'transboundary' tours, and members of the Adventure Travel Trade Association. An overview of the key stakeholders, (and the method of consultation selected for each) is outlined in the table below, and a detailed breakdown of individual participation in the consultation processes is in Annex 1.

Table 1: Stakeholders proposed for interview and/or consultation workshop participation

Stakeholder	Expertise, specific TFCA or event	Form of consultation			
		Interview	Workshop	Online survey	Validation workshop
SADC Secretariat	Understanding of relevant regional legislation & of cross-border tourism products in SADC TFCAs				
Specific members of the SADC TFCA Network	Understanding of relevant legislation and cross-border tourism products in SADC TFCA				
Members of the TFCA Network Tourism Community of Practice from the project backstopping team	Understanding of cross-border tourism products and issues in SADC TFCAs				
Regional Tourism Organization of Southern Africa (RETOSA), Boundless Southern Africa and national tourism boards in SADC	Marketing, promotion and source markets for TFCAs and cross-border tourism products in SADC TFCAs				
IUCN WCPA Tourism and Protected Areas Specialist Group (TAPAS) and Transboundary Group members	International best practice knowledge on sustainable tourism and transboundary conservation issues				

Stakeholder	Expertise, specific TFCA or event	Form of consultation			
		Interview	Workshop	Online survey	Validation workshop
Private sector, NGOs and protected area authorities operating TFCA products, including cross-border events	Specific cross-border tourism knowledge and experience				
Regional and international tour operators with cross-border itineraries and tours in SADC TFCAs	Specific cross-border tourism knowledge and experience				

3.2.2   CONSULTATION TOOL DEVELOPMENT AND USE

Three types of questionnaire were developed for use in online surveys and interviews (i.e. face to face, and telephone). These were based on the target information specified in the Terms of Reference (see Annex 2), and as refined during the inception phase. Draft questionnaires were reviewed by the TFCA Network Tourism Community of Practice, finalized, and then distributed to their target stakeholder group (see Table 2). The final versions of each questionnaire can be found in Annex 3.

Table 2: Survey consultation

Target stakeholder (consultation type)	Distribution	Sample size	No. responses
1. Policy makers and planners working on TFCAs and tourism in SADC (strategic questionnaire)	Circulated by GIZ to stakeholder database of 39 members of the SADC TFCA network, members of the TFCA Network Tourism Community of Practice, national tourism boards and tourism associations; by SADC Secretariat to 22 SADC TFCA national contact points; and by RETOSA to its 32 board members. The questionnaire was also distributed to members of the IUCN World Commission on Protected Areas Tourism and Protected Areas Specialist Group (TAPAS Group) with 500 members and Transboundary Group with (250 members). Survey open from 20 December 2017 to 28 February 2018 (i.e. 2 months) and again following the validation meeting from 6 July – 20 July 2018.	93 direct invitations 750 indirect invitations	26
2. Cross-border tourism product owners and developers (detailed questionnaire)	Circulated by GIZ to stakeholder database of 25 cross-border tourism product operators. Used as a basis for face-to-face and telephone interviews, and as an online questionnaire. Survey open from 1 December 2017 to 28 February 2018 (i.e. 3 months)	25 direct invitations	19
3. International and regional tour operators with existing or potential cross-border tourism tours (tour operator questionnaire)	Circulated by GIZ to international and regional tour operator database of 200 companies. The survey was also circulated by secretariats of the Association of Eastern and Southern Africa (ASA) (160 members) and Advancing Tourism to Africa (ATTA) (450 members)[12] Survey open from 12 to 27 April 2018 (i.e. 2 weeks)	186 direct invitations 610 indirect invitations	39

For clarity and easy comparison, all prices are presented in USD, and have been converted from their original currency using the exchange rate of USD1 = ZAR12.5 = N$12.5 GBP 0.702.[13]

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[12] http://www.south-african-hotels.com/page/accreditations/
[13] Oanda.com, 16 April 2018.

3.2.3   CONSULTATION WORKSHOP

A 2-day consultation workshop was held in Johannesburg on 30 and 31 January 2018. The two-day program incorporated a series of presentations from SADC and the consultant to provide context for the meeting, combined with presentations and videos from product developers and operators. Five working-group sessions were organized, in addition to plenary discussion sessions relating to the working groups and key topics. Due to the large number of workshop participants, the participants were pre-allocated to specific working groups where it was felt their expertise would be most applicable. Participants were also given freedom to change their group, if they wished to do so. The agenda can be found in Annex 4, and illustrates how issues from the table of contents for this Situational Analysis Report, and also the Guideline, were addressed systematically during the workshop. Details of the workshop participants can also be found in Annex 1. The presentations made can be found in Annex 5.

3.2.4   VALIDATION WORKSHOP

A 1-day validation workshop was held in Johannesburg on 4 July 2018. The program included a presentation summarizing this report, and discussion on its content and recommendations. A presentation was also made on the guideline, followed by a series of working groups to validate the guideline text. Following this event, a further two-week period was provided to the participants for additional comments and contributions to the strategic survey, during which no more feedback or survey entries were received. Details of the workshop participants can be found in Annex 1. The presentations made can be found in Annex 5.

3.3   REPORT

Based on the literature reviewed and stakeholder consultation, a draft report was compiled and was submitted to the SADC FANR, the SADC/TUPNR Project and members of the TFCA Network Tourism Community of Practice in line with the Table of Contents agreed in the inception report.[14] Based on feedback received from this group, and also comments received during the validation workshop, this final situational analysis report was compiled.

- **Deliverable 6: Final report on 'SADC TFCA cross-border product overview'**

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[14] Spenceley, A. (2018) Development of a SADC guideline on cross-border touirsm products in TFCAs, Inception report, 10 November 2017, Final, Report to GIZ

4   EXISTING CROSS-BORDER TOURISM PRODUCTS

The development of annual or bi-annual cross-border events within SADC TFCAs has been to establish unique tourism experiences, while also testing processes and protocols. For example, they have been used to engage with different stakeholders in countries, such as personnel from security clusters, customs and immigration. They have also helped to test and improve connectivity in less accessible parts of TFCAs. Such events can be thought of as a springboard for cross-border tourism products with more regular departure dates. However, it is recognized that integrating endurance-style cross-border tourism products into tour itineraries is challenging, as they are such a niche product, but 'softer' products may be easier to mainstream. In order to implement the products effectively, a well-defined and transparent process needs to be in place for tour operators to move their guests, staff, and vehicles between countries easily.

It is clear that existing cross-border tourism products have been established due to the persistence, energy and dedication of particular champions. Some of these are in government, some in protected area authorities, some within NGOs, and some within the private sector. Regardless of their institutional setting, these champions have persevered through challenging processes with considerable red tape, in TFCAs where there is a lack of capacity and sometimes limited effectiveness of TFCA support staff, to deliver successful products to tourists and visitors.

This section gives an overview of existing cross-border tourism products operating in SADC TFCAs. More detailed information on each product can be found in Annex 6.

4.1   SADC TFCA STATUS

Currently there are 18 TFCAs in SADC in both terrestrial and marine environments, which are at various stages of development (see table below). There are a number of renowned tourism destinations within these TFCAs, and great potential to generate further employment and other benefit flows in largely rural and marginalized areas, thereby contributing to enhanced livelihoods.

Table 3: Status of SADC TFCAs[15]

Transfrontier Conservation Area	Countries involved	Type of agreement
/Ai /Ais-Richtersveld Transfrontier Park	South Africa and Namibia	MoU signed in 2001
Kgalagadi Transfrontier Park	Botswana and South Africa	Bi-lateral agreement signed in 1999
Kavango Zambezi (KAZA) Transfrontier Conservation Area	Angola, Botswana, Namibia, Zambia and Zimbabwe	Multi-national treaty signed in 2011
Great Limpopo Transfrontier Park (GLTP)	Mozambique, South Africa and Zimbabwe	Tri-lateral agreement signed in 2000 and Joint Operational Plan in place
Lubombo Transfrontier Conservation and Resource Area	Mozambique, Swaziland and South Africa	Tri-lateral General Protocol signed in 2000
Maloti-Drakensberg Transfrontier Conservation and Development Area	Lesotho and South Africa	Bi-lateral MoU signed in 2000
Iona-Skeleton Coast TFCA	Angola and Namibia	MoU signed in 2003
Greater Mapungubwe Transfrontier Conservation Area	Botswana, South Africa and Zimbabwe	MoU signed in 2006
Chimanimani TFCA	Mozambique and Zimbabwe	No data available but Mozambique is in the process of pursuing the establishment, although there are significant threats related to artisanal gold mining.
Malawi-Zambia Transfrontier Conservation Area	Malawi and Zaambia	MoU in place and project management teams established subsequent to bi-lateral meetings in 2003

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[15] Zunkel, K. (2014) Southern African Development Community Transfrontier Conservation Guidelines: The establishment and development of TFCA initiatives between SADC member states, Report to SADC

Transfrontier Conservation Area	Countries involved	Type of agreement
Maiombe Forest Transfrontier Conservation Area	Angola, Congo and Democratic Republic of Congo	In process
Liuwa Plains – Mussuma Transfrontier Conservation Area	Angola and Zambia	In process
Lower Zambezi - Mana Pools Transfrontier Conservation Area	Zambia and Zimbabwe	In process
ZIMOZA Transboundary Natural Resource Management Project	Mozambique, Zambia and Zimbabwe	In concept stage
Kagera Transfrontier Conservation Area	Ruwanda, Tanzania and Uganda	In concept stage
Selous and Niassa Wildlife Protection Corridor	Mozambique and Tanzania	MoU on cross-border cooperation signed in 2007
Mnazi Bay-Quirimbas Transfrontier Conservation Marine Area	Mozambique and Tanzania	In concept stage
Western Indian Ocean Transfrontier Conservation Area	Comoros, France, Madagascar, Mauritius, Mozambique, Seychelles and Tanzania	In concept stage

The location of the TFCAs are shown in Figure 1 below.

Figure 1: Status of TFCAs in SADC (2017)
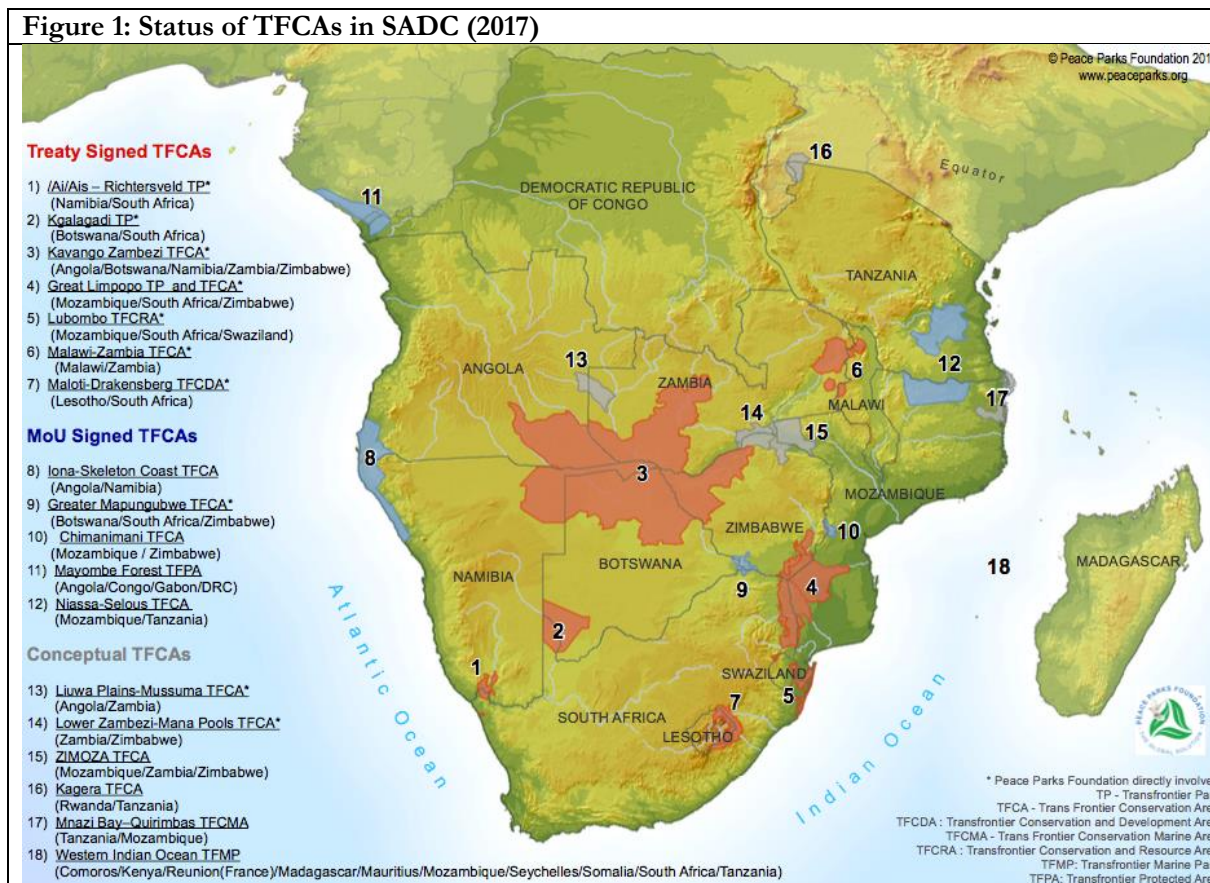
4.2   ANNUAL OR BI-ANNUAL CROSS-BORDER TOURISM PRODUCTS

Seven existing cross-border tourism products with annual or bi-annual events were identified, in addition to three proposed products, in six SADC TFCAs (see table below). These events are all adventure tourism products, save the KAZA Golf Classic. The capacity for participants ranges from 16 (i.e. the Great Limpopo Transfrontier mountainbike (MTB) trail) to 350 (i.e. the Nedbank Tour de Tuli). The prices for

participation range from USD80 (i.e. the KAZA Golf Classic[16]) to USD 2240 (i.e. the Great Limpopo Transfrontier MTB trail), and more than half of events fall in the USD1900-2240 price range. A detailed inventory of these events is provided in Annex 6, which has more information about these events, including the year the event began, its objectives, dates, agencies involved, and contact details. Maps indicating the routes taken are provided in Annex 7.

Table 4: Existing and proposed annual and bi-annual cross-border tourism products in SADC TFCAs

TFCA	Name of product	Overview of product	No. participants	Cost of entry
/Ai/Ais-Richtersveld TP	Desert Knights	Bi-annual 6 day mountain bike and canoe event - 275 kms in Namibia and South Africa.	84 in 2017 (100 max)	USD 1328 (2018)
	The Namibia Crossing[17]	Bi-annual 5 day foot race - 192 kms in South Africa and Namibia.	57 in 2014 (80 max)	USD 2116 (2017)
Kavango Zambezi TFCA	Kavango Zambezi Golf Classic	Annual 2 day event held at 2 golf courses in Botswana and Zimbabwe.	84 in 2017	USD80 (2017)
	Proposed: KAZA Kruze	*Mountain bike tour in 4 national parks in Botswana, Namibia, Zambia and Zimbabwe*	*TBA*	*TBA*
Greater Mapungubwe TFCA	Safari-on-the-Run. Mapungubwe[18]	Annual 3 day trail run, over 92 km in South Africa and Zimbabwe.	76 in 2017 (inaugural event) (80 max)	USD 1950 (2018)
	Nedbank Tour de Tuli	Annual 4 day mountain bike event, covering 248 km in 2017, in Botswana, South Africa and Zimbabwe	255 in 2017 (350 max)	USD 2066 (2018)
Great Limpopo TFCA	Great Limpopo Cycle Trail	Annual 4 day mountain bike trail, covering 240 km between South Africa and Zimbabwe	16 in 2017 (pilot event)	USD 2240
	Pafuri Cross-border Trail and Shangaan Festival	Annual 4 day hiking trail, covering 40 km, in South Africa and Zimbabwe	16 in 2015 (16 max)	USD656 (2017)
Maloti-Drakensberg TFCA	*Proposed: Wildrun*	*3 day trail run, covering 77 km between Lesotho and South Africa*	*(80 max)*	*TBA*
Lubombo TFCA	*Proposed: World Adventure Race Camp*	*6 day adventure race event, covering 500 km in South Africa and Mozambique*	*(400 max)*	*TBA*

The figure below illustrates the frequency of events between 2005 and 2017. It shows that there was a steady increase in the number of events between 2009 and 2016, increasing from just the Tour de Tuli between 2005 and 2009, to 7 events held in 2016. In both 2018 and 2019 there are 7 events planned.

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[16] This prices is for golfing fees only, not for accommodation or transportation
[17] Formerly the Richtersveld transfrontier Wildrun
[18] Formerly the Mapungubwe Transfrontier Wildrun

Figure 2: Frequency of cross-border events (2005 -2017) and predicted (2018-2019)

No. events 2005-2017:
- Tour de Tuli (13)
- Desert Knights (11)
- Kavango Zambezi Golf Classic (5)
- Pafuri Cross-border Trail and Shangaan Festival (2)
- Safari-on-the-Run. Mapungubwe (2)
- The Namibia Crossing (1)
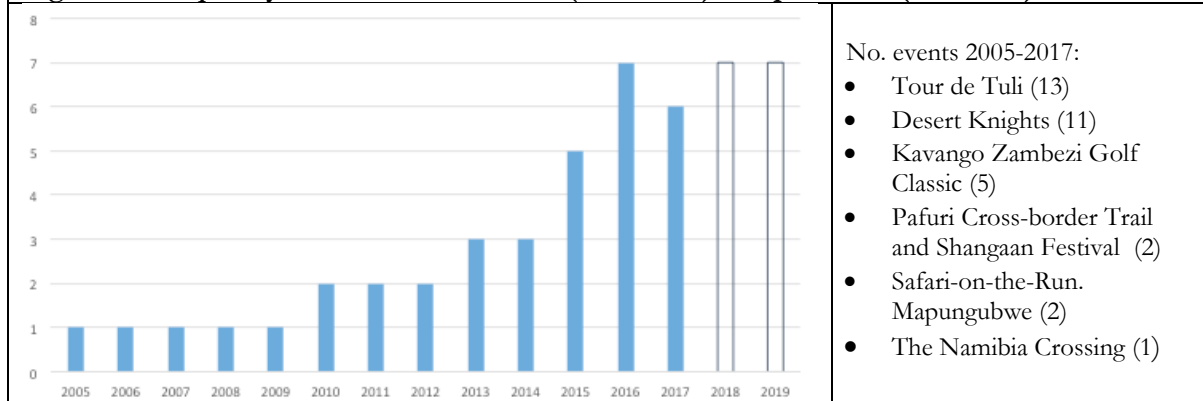
The online survey indicated that the dominant characteristics of cross-border tourism products were community, wildlife and culture (see figure below).

Figure 3: What are the key characteristics of the cross-border tourism product? (n=33)
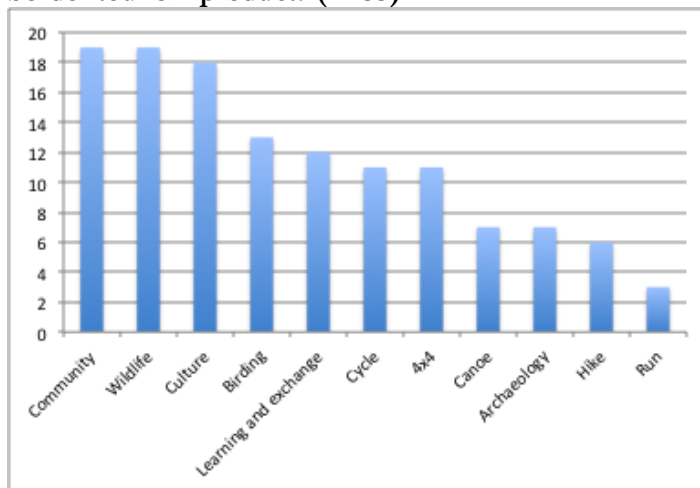
4.3   YEAR-ROUND CROSS-BORDER TOURISM PRODUCTS

Thirteen proposed cross-border products with regular departures were identified in six SADC TFCAs (see table below). A detailed inventory of these events is provided in Annex 6, which has more information about these products, including its objectives, dates, agencies involved, and contact details.

Table 5: Proposed cross-border tourism products with regular departures in SADC TFCAs

TFCA	Name of product	Overview of product	Cost
/Ai/Ais-Richtersveld TP	Desert Kayak Trail	4 day canoe trail over 40 km in Namibia and South Africa, throughout the year	USD 357 (estimate)
	Fish River 'Extension' hiking trail	Hiking trail network, and MTB trails in South Africa and Namibia	TBA
Kavango Zambezi TFCA	Birding routes	Development of a birding route linking Important Bird areas and local entrepreneurs in Angola, Botswana, Namibia, Zambia and Zimbabwe	TBA
	Botswana day visitors	Enable guests from lodges in Botswana to visit the Mapungubwe WHS in South Africa	TBA

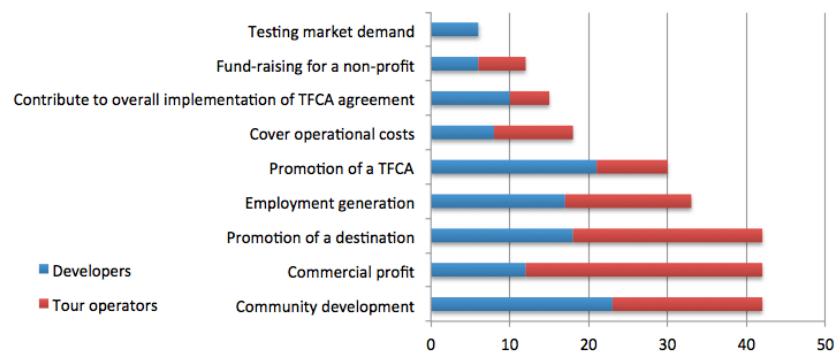| TFCA	Name of product	Overview of product	Cost
Greater Mapungubwe TFCA	Adventure tours	Adventure trails between South Africa and Zimbabwe, and potentially Botswana, using Maramani community camp in Zimbabwe	TBA
	Defender Trophy	4 day 4x4 trail for up to 25 vehicles between South Africa, Botswana and Zimbabwe (due September 2019)	USD 705
Great Limpopo TFCA	Great Limpopo Cross-border 4x4 trail	3 trail option, 6-9 days of 2-3 countries (South Africa, Zimbabwe and Mozambique)	TBA
	Self-guided 4x4 trails	Overland 4x4 trail network linking Kruger NP, Gonarezhou NP and Limpopo NP in South Africa, Zimbabwe and Mozambique	TBA
	Machampane Wilderness Trail	4 or 5 days trail, using Machampane camp as a base, in Mozambique and South Africa	USD 149 p/d to USD 183 p/d
Maloti-Drakensberg TFCA	Maloti-Drakensberg Grand Traverse	3-4 day hiking and pony trail between South Africa and Lesotho, linking existing accommodation and trails in both countries	USD 415 to USD 498 (Estimate)
Lubombo TFCA	Lower Usutu Adventure Trail	5 day canoe, cycle and hiking trail, covering 50-150 km in Mozambique, South Africa and Swaziland	TBA
	Lubombo ecotrails - Mhlumeni-Goba cross-border trail	Hiking, MTB, 4x4, rafting and canoeing trails linking communities in Mozambique, South Africa and Swaziland	TBA
	Maputo Special Reserve-Tembe 4x4 trail network	Linking the 4x4 trail network in MSR with the trails in Tembe Elephant Park, in Mozambique and South Africa	TBA

4.4   OBJECTIVES OF CROSS-BORDER TOURISM PRODUCTS

Motivations to establish cross-border tourism products vary between developers. Within the Detailed and Strategic stakeholder surveys (i.e. Developers), the top five reasons for developing cross-border tourism products were: (1) community development (70% of respondents), (2)

Figure 4: What are the objectives of the product? (n=71)

promotion of a TFCA (64%), (3) promotion of a destination (55%), (4) employment generation (52%), and (5) commercial profit (36%) (n=33, see blue columns in Figure 4). The relatively low emphasis on commercial profit, may relate to the profile of participants, as the samples emphasized government representatives, protected area authorities, TFCA officials, and NGOs. Private sector represented 15% of the sample. By contrast, the top five reasons provided by tour operators surveyed for cross-border tourism products were: (1) commercial profit (79%), (2 & 3) conservation of nature (63%) and promotion of a destination (63%), (4) community development (50%) and (5) employment generation (42%) (n=38; see red columns in Figure 4).

The emphasis on community development and employment in both sample groups has been used to shape the content of the Guideline, to ensure that approaches to maximize community development and benefits. It noteworthy that the 'conservation of nature' was prioritized as an objective more frequently by tour operators than by cross-border tourism product developers.

5   ENABLING ENVIRONMENT

Governments within SADC have undertaken a series of initiatives to improve the enabling environment for facilitating cross-border tourism products and the movement of tourists within TFCAs. Activities have included new border posts within TFCAs, including the Kgalagadi Transfrontier Park (i.e. Twee Rivieren and Mata Mata border posts), Great Limpopo Transfrontier Park (i.e. Giriyondo Border Post) and /Ai/Ais-Richtersveld Transfrontier Park (i.e. Sendelingsdrift Border Post and Pontoon). A univisa system operating between Zambia and Zimbabwe facilitates easier access for visitors to the popular Victoria Falls and Livingstone area that falls within the Kavango Zambezi TFCA. However, there are also substantial technical and logistical challenges faced by cross-border tourism product operators, in both their development and operation.   This section reviews the status of policy, plans, legislation and support infrastructure and services.

5.1   POLICY AND PLANS AT SADC AND TFCA LEVEL

There are a number of policies and plans at SADC level that provide context for cross-border tourism in SADC TFCAs. At a TFCA level, there are also treaties and memorandums of understanding between countries, TFCA tourism plans and integrated plans (e.g. for KAZA and the GLTP).   Also individual protected areas within countries have management plans (and some have tourism plans). Some countries also have national tourism master plans and/or strategies, which may, or may not, address cross-border tourism. An overview of these is provided in this section.

5.1.1   CROSS-BORDER TOURISM PRODUCT SUPPORT OF TFCA TREATIES

There are many provisions within existing SADC policies and TFCA treaties that aim to provide an enabling environment for cross-border tourism. For example:

- **RETOSA Charter, 1997:** The charter outlines specific objectives for the Regional Tourism Organization of Southern Africa (RETOSA). These include to "encourage and facilitate the movement of flow of tourists in the region", and to "facilitate a community and rural-based tourism industry and culture." (Article 3, [a])[19] In 2016 SADC Ministers directed RETOSA Board to review the Charter.[20]

- **SADC Protocol on the Development of Tourism, 1998**[21]: The Protocol sets out SADC's objective to build upon the region's potential as a tourist destination. SADC intends to ensure even distribution of tourism development throughout the region and to create a favourable environment for tourism, thereby using tourism as a vehicle for socio-economic development. To facilitate these plans, Member States agree to encourage private sector involvement in the industry through incentives, infrastructure, and a regulatory framework that encourages their participation. As well, the Protocol establishes systems for facilitating travel to Southern Africa, training for industry workers, and marketing the region as a tourist destination. For example, the objectives include, "To facilitate intra-regional travel for the development of tourism through the easing or removal of travel and visa restriction and harmonization of immigration procedures" (Article 2 [10]). It highlights the tourism univisa (Article 5 [c]) and the, "removal of obstacles to the development of tourism, travel, and other impediments and to harmonise legislation relating thereto" (Article 5, [d]). Article 11 relates specifically to the pursuit of environmentally sustainable tourism. It also includes an institutional framework for implementing the Protocol, specifying committees, units, duties, and procedures relevant to improving tourism in the region.

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[19]   Charter   of   the   Regional   Tourism   Organization   of   Southern   Africa   (1997)   Accessed   from http://www.sadc.int/files/9013/5292/8384/Charter_of_the_Regional_Tourism_Org_of_Southern_Africa_1997.pdf   on   28 February 2018

[20] SADC (2016) Press Release, 7th meeting of the SADC Ministers responsible for tourism, Masa Hotel, Gaborone, Botswana, 7 July 2016

[21] Southern African Development Community (SADC) (2012) Protocol on the development of tourism (1998) Accessed from http://www.sadc.int/files/2413/5292/8368/Protocol_on_the_Development_of_Tourism1998.pdf on 18 September 2013

- **SADC Protocol on Wildlife Conservation and Law Enforcement, 1999**[22]: The Protocol does not make reference to tourism, but objectives include to, "promote conservation of shared wildlife resources through the establishment of transfrontier conservation areas" (Article 4, 2(f). The protocol states that Parties should endeavor to harmonize national legal instruments standardizing, "economic and social incentives for the conservation and sustainable use of wildlife" (Article 6, 2[g]), which could be applied to cross-border tourism products.

- **Revised Protocol on Shared Water Courses, 2002**[23]: While this protocol does not specifically mention tourism, its objectives include to "advance the sustainable, equitable and reasonable utilisation of the shared watercourses." (Article 2[b]). This gives a framework for cross-border water-based tourism, such as canoeing and rafting.

- **SADC Regional Indicative Strategic Development Plan (RISDP) (2005-2020):** The RISDP is a 15-year regional integration development framework that sets priorities, policies and strategies for SADC. The plan includes strategies related to poverty eradication, regional development integration, regionally balanced and equitable development, integration into continental and global economies, sustainable development and gender equality.[24]

- **SADC TFCA Programme, 2013**[25]: Component 7 of the SADC TFCA Programme is "The development of TFCAs into marketable regional tourism products." Key activities include to "Develop and market regional flagship cross-border tourism products", and to "Develop guidelines to facilitate equitable joint venture partnerships between local communities and the private sector." Component 5 on, "The enhancement of local livelihoods" makes reference to increasing investment in cross-border infrastructure and tourism projects to contribute towards improving local economies. Key activities include, "To develop a portfolio of transboundary infrastructure, trade and tourism projects within TFCAs." and "Convene investor conferences to encourage investment in these transboundary projects."

- **Protocol in Trade in Services, 2012**[26]: Objectives of the protocol include to "progressively liberalise intra-regional trade in services on the basis of equity, balance and mutual benefit", coupled with the promotion of "sustainable economic growth and development, thereby raising the standard and quality of life of the people of southern Africa" (Article 2, [1 & 2]). The mutual recognition article specifies that necessary steps for negotiation of an agreement, "providing for the mutual recognition of requirements, qualifications, licenses and other regulations . . . for the authorization, licensing, operation and certification of service suppliers and, in particular, professional services" (Article 7[1]). In relation to market access, the protocol also indicates that no State party shall adopt or maintain, "limitations on the number of service suppliers", or "limitations on the total number of natural persons that may be employed in a particular service sector" (Article 14 [a & d]). Therefore, this protocol makes provision to address the issue of licenses and permits for tourism companies and their employees crossing international borders to facilitate cross-border tourism.

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[22] Southern African Development Community (SADC) (1999) SADC Protocol on Wildlife Conservation and Law Enforcement, Accessed from http://www.tbpa.net/docs/pdfs/SecMan/SecManSADCProtocol.pdf on 28 February 2018

[23] Southern African Development Community (SADC) (2002) Revised protocol on shared watercourses in the Southern African Development Community, accessed from http://www.sadc.int/files/3413/6698/6218/Revised_Protocol_on_Shared_Watercourses_-_2000_-_English.pdf on 28 February 2018

[24] SADC (2001) Summary of the Regional Indicative Strategic Development Plan, Accessed on 17 April 2018 from http://www.sadc.int/files/5113/6785/2592/SADC_RISDP_Summary_en.pdf

[25] Southern African Development Community (SADC) (2013) SADC Programme for Transfrontier Conservation Areas, SADC Secretariat, Gaborone, October 2013, accessed from http://www.sadc.int/files/4614/2122/3338/SADC_TFCA_Programme_FINAL_doc_Oct_2013.pdf on 28 February 2018

[26] Southern African Development Community (SADC) (2012) http://www.sadc.int/files/7313/6439/6118/Protocol_on_Trade_in_Services_-_2012_-_English.pdf

- **Positioning the transfrontier parks (TFPs) and transfrontier conservation areas (TFCAs) as southern Africa's premiere international tourism destination, phase two (2015 to 2025), Final draft, undated[27]:** This strategy builds on the foundations of a phase one (2005-2015) strategy, to focus on the development and sustainability of all TFCAs in a post 2010 World Cup environment, and which provided direction to establish Boundless Southern Africa (see box below). The strategy aims to increase the tourism potential of southern Africa by positioning TFCAs as preferred tourist and investment destinations in the region by consolidating multi-national products into a comprehensive and marketable regional tourism product. It also seeks to use TFCAs as a mechanism to foster cross-border cooperation in tourism development. The main components of the strategy are marketing and awareness raising, investment promotion and infrastructure development.

Box 1: Boundless Southern Africa[28]

To coordinate and successfully implement the TFCA Development Strategy the Boundless Southern Africa brand was developed, an umbrella brand for marketing TFCAs as tourist and investment destinations in a consolidated and coordinated manner. The brand was endorsed by Ministers of nine participating countries and was launched in May 2008 at the Tourism Indaba. South Africa was requested to coordinate implementation of the strategy, with the TFCA 2010 Coordinating Unit being established within the Department of Environmental Affairs and Tourism in 2007.

The strategy included a two-phased approach in the implementation of the strategy with Phase 1 focusing on showcasing seven TFCAs (i.e. the /Ai/Ais-Richtersveld, Kgalagadi, Greater Mapungubwe, Great Limpopo, Lubombo, Maloti-Drakensberg and Kavango-Zambezi) in nine SADC countries (i.e. Angola, Botswana, Lesotho, Mozambique, Namibia, South Africa, Swaziland, Zambia and Zimbabwe). , These TFCAs were selected based on their level of development (i.e. formally established and operational). It was agreed that Phase 1 would serve as a pilot to test the consolidation model for tourism development in TFCAs and that lessons learnt and practices generated would be replicated and up-scaled to all 18 TFCAs in the region, resources permitting. The aim of Phase 2 therefore is to consolidate the achievements of Phase 1 and to ensure the development and sustainability of all TFCAs across the region

The strategy aims to increase the tourism potential of southern Africa by positioning TFCAs as preferred tourist and investment destinations in the region by consolidating multi-national products into a comprehensive and marketable regional tourism product.

In terms of TFCA treaties and cross-border tourism, the examples of the KAZA TFCA and Lubombo TFCA are provided here to illustrate:

- **KAZA TFCA MoU and Treaty:** The MoU between the Governments of the Republics of Angola, Botswana, Namibia, Zambia and Zimbabwe to establish KAZA include the objective to realize "synergies to promote cross-border tourism as a means of regional socio-economic development."[29]. Specific objectives of the KAZA TFCA Treaty include to (a) Provide opportunities, facilities and infrastructure that shall transform the KAZA TFCA into a premier tourist destination in Africa made up of a range of independent yet complementary and integrated sub-regional tourism development nodes, and (b) Facilitate tourism across international borders in the KAZA TFCA.[30]

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[27] Boundless (Undated) A strategy paper, Positioning the transfrontier parks (TFPS) and transfrontier conservation areas (TFCAs) as southern Africa's premiere international tourism destination, phase two – 2015 to 2025, final draft

[28] Boundless (Undated) A strategy paper, Positioning the transfrontier parks (TFPS) and transfrontier conservation areas (TFCAs) as southern Africa's premiere international tourism destination, phase two – 2015 to 2025, final draft

[29] Inter-ministerial Commission of Transfrontier Conservation Area (TFCA) KAZA (2011) Integrated Development Plan: Angola component, Draft April, 2011 (translated from Portuguese using Google Translate)

[30] Ministry of Environment, Wildlife and Tourism (MEWT) (2013) The Integrated Development Plan for the Kavango Zambezi Transfrontier Conservation Area for the Botswana component 2013-2017. Government of Botswana, Gaborone.

- **Lubombo TFCA General Protocol, 2000[31]:** While tourism is not directly specified, objectives of the TFCA include, "economically and financially sustainable development, the sustainable utilization of the natural resource base (Article 2 [2]), and "the identification of opportunities to broaden ownership patterns . . . encouragement of local small business, of community-owned ventures, and of joint ventures with domestic and global investors" (Article 2 [11]).

While these SADC policies provide a strong framework for cross-border tourism, stakeholders raised concerns regarding the lack of harmonization of statutes, and that not all protocols had been ratified at the country level. There was also a call for improved feedback on the impacts of policies, including to capture lessons learned from policy decisions. For example, while there are provisions to promote private investment, there is a need for greater effort to make opportunities for private sector partners available.

Furthermore, better coordination is required for cross-border tourism products to function effectively. For example, improved communication and direction on cross-border protocols is required between ministers and ministries, joint committees, and security cluster personnel on the ground (i.e. immigration, police and customs).

> "bureaucratic requirements often seem inexplicable and the penalties for their non-compliance are often draconic" [32]

In relation to national and TFCA plans, the example for Mozambique's strategic tourism plan and the GLTP's integrated development plans are provided here to illustrate:

- **Strategic Plan for Development of Tourism in Mozambique (SPDTM II), (2016-2025), 2015[33]:** This national tourism plan incorporates a situational analysis, strategic recommendations, and a number of catalyst projects. The plan makes specific reference to the "improvement of cross-border attractions" and identifies "links to cross-border nature areas and routes" as opportunities for tourism resources, facilities and services.
- **Integrated Development plan, Great Limpopo Transfrontier Park (2013):[34]** The vision of the park is "GLTP, a globally preferred ecotourism destination", and the mission aims to unlock the ecotourism potential of the park. The strategic objectives include to, "…develop trans-border ecotourism as a means of fostering regional socio-economic development."(2.2[e]). The plan incorporates concepts for tourism products, including four transfrontier wilderness trails, three self drive 4x4 trails, and establishment of an international development note in the Pafuri/Sengwe area (including establishing adventure products, concessions, an airstrip at Pafuri, and also guided experiences to the annual Shangaan Festival).

While these plans include provision for cross-border tourism development, there is a lack of human resources within TFCAs to realize them. Some TFCA coordinators have driven the establishment of new cross-border tourism products (e.g. the KAZA Golf Classic, the GLTP Pafuri Trail and Shangaan festival, the /Ai /Ais Richtersveld's Desert Knights). For example, some TFCAs have tourism officers in place to drive and facilitate cross-border tourism (e.g. Maloti-Drakensberg TFCA), but others do not. This means that there is not always someone in place who can act as a focal point for tourism investors, or event organisers. There is a need for personnel in TFCAs who have the designated responsibility to help obtain the required permission and permits for cross-border tourism products, and to help convene meetings of key people at appropriate stages of the process (e.g. the security cluster, community members).

5.1.2 LEGISLATIVE ISSUES RELATING TO TRANSBOUNDARY MOVEMENT

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[31] Anon (2000) General trans-frontier conservation and resource area protocol between the government of the republic of South Africa and the government of the Republic of Mozambique and the Government of the Kingdom of Swaziland, Accessed from https://www.scribd.com/document/6805890/L-TFCA-General-Protocol-Signed-on-22-June-2000 on 28 February 2018

[32] Bollman, M., Bollman, N., Mhlpohe, B., Seif, J., Sturmann, U., and Motaung-Sturmann, L. (2015) Regional cross-border tourim: recommendations for the Southern African Development Community (SADC) Final report, Fair Trade Tourism, GIZ, p12

[33] Republic of Mozambique, Ministry of Culture and Tourism (2015) Strategic Plan for Development of Tourism in Mozambique (SPDTM II), (2016-2025) Approved by 48th Ordinary Seciotn of Ministers Council, 8th December 2015
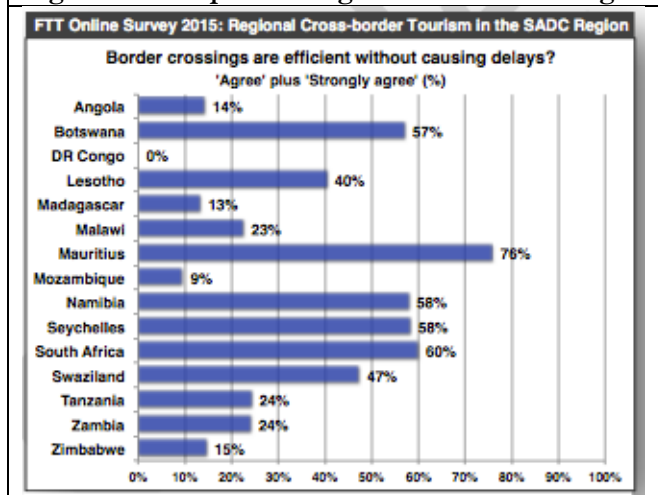
[34] Great Limpopo Transfronter Park Joint Management Board (2013) Integrated Development Plan, Limpopo Transfronter Park, draft April 2013,

There are a series of legislative issues relating to transboundary movement of labour, equipment and tourists, such as regulations relating to border crossings for tourists, security, staff and equipment. Legislative issues relating to transboundary movement of tourists and tour operators in TFCAs have been extensively researched in previous assignments. These include a regional cross-border tourism study conducted for GIZ and SADC by Fair Trade Tourism in 2015, and a policy harmonization study conducted for KAZA in 2013[35]. The issues highlighted in those reports were reinforced by stakeholder feedback obtained during this assignment. A summary of issues is provided below, and for more detail, kindly refer to the 2013 and 2015 studies.

Challenges relating to cross-border tourism that relate to these issues are summarized below:

- **Border delays:** The border procedures of some SADC countries are highly inefficient and cumbersome. At some border posts delays of many hours (and even several days) have been reported, especially at busy holiday weekends. This is mostly due to bureaucratic processes (e.g. lengthy immigration and customs procedures, temporary work permits for tour guides and drivers, vehicle insurance requirements, etc. and operational challenges at border posts. Border crossings in the DRC, Mozambique, Angola, Madagascar, Zimbabwe, Malawi, Zambia and Tanzania have been highlighted for being particularly difficult, frustrating, and

Figure 5: Perception of regional border crossings[36]

time consuming.[37] Operators are required to familiarize themselves with the border and customs requirements, including sometimes appointing a clearing agent. One cross-border tourism product organizer reported a 5-day delay at Beitbridge border post, of equipment being moved between countries. Sometimes borders do not have a customs function attached, and therefore the movement of goods (such as fresh food) requires prior arrangements with a regional office, with an inventory of items being transported. A sign of positive change is that a new efficient and well-laid out border terminal on the Zambian side of the Namibia-Zambia border near Katima Mulilo and Sesheke on the Zambezi river,[38] and new border posts have been identified and agreed by bi-national commissions for Mapungubwe and Chikwarakwara. General feedback from tour operators surveyed indicated that there was variation between border posts – between "brilliant to awful", and that slow processes and uncooperative staff posed substantial challenges.

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[35] Boonzaaier, W. V., Young, A., Attwell, B., and Lombard, D. (2013) Kavango Zambezi Transfrontier Conservation Area (KAZA-TFCA) – Harmonisation of natural resource management and tourism, Contour Project Managers cc & Associates, May 2013 & Bollman, M., Bollman, N., Mhlpohe, B., Seif, J., Sturmann, U., and Motaung-Sturmann, L. (2015) Regional cross-border tourism: recommendations for the Southern African Development Community (SADC) Final report, Fair Trade Tourism, GIZ, p12
[36] Bollman, M., et al, 2015, op. cit, based on 126 survey responses from tour operators and companies involved in southern African tourism.
[37] Bollman, M., et al, 2015, op. cit
[38] Bollman, M., et al, 2015, op. cit

- **Tourist visas:** The univisa is only currently available between Zambia and Zimbabwe, costing USD 50 for 30 days[40]. Therefore for independent tourists, visa requirements can make it complicated for tourists to enter a country, both for their costs as well as for the time and hassle factor. Overall, the costs of visas can be a deterrent for potential tourists, especially from Asian and Latin American countries, which are not visa-exempted as the traditional tourist markets in Europe or the USA.[41] Where they persist, visas

Figure 6: An undesignated border crossing[39]

Support and assistance from 3 countries

within SADC for internationals can be expensive (see Annex 8, prepared by Fair Trade Tourism[42]). Tour operators surveyed suggested simplifying or removing visas in SADC countries, to make travel easier.

- **Mutual-recognition of workers:** Tour operators often face the challenge that their tour guides are not allowed to work across-borders. If tour operators have to employ local tour guides in both countries, the tour costs may also rise significantly, hence making cross-border itineraries more expensive and less competitive. [43] For cross-border itineraries, the implications are that a tour operator touring through KAZA entering Botswana cannot use their own driver and guide to visit Chobe or other parks, even if they are citizens of another SADC country. If this was possible, then operators could offer longer and more diverse trips in the region, including more remote areas, to their clients. By contrast, stakeholders suggest that it is relatively easy to visit TFCAs as officials. There are challenges providing cross-border access for emergency services in TFCAs (e.g. ER24 services used during Desert Knights enter Namibia from South Africa, but they are not permitted through the most convenient border post, and need to make a substantial detour to Sendelingsdrift.) Surveyed tour operators indicated that there were inconsistencies and a lack of transparency, and also suggested that to have permits for 3 years (as opposed to applying for permissions each year) would improve this challenge. One operator remarked that, "Guiding is a seasonal profession yet the required paperwork and compliance certification are laborious and expensive and not comparable to the earning potential. Guiding is being (over)controlled and (over)legislated, yet there are hardly any laws or rules for Tour Operators . . . the Tour Operators . . . make the money and carry the business risk and ultimately the responsibility." Another operator suggested, "There needs to be some sort of standardization in the TFCA area with regard to minimum requirements, in order for their (guide) fees to be equitable in each country to the tourist."

- **Movement of equipment and goods:** SADC countries require the payment of 'temporary import' duties for tour operator vehicles during their stay in the country. [44] The Zimbabwean Temporary Import Permit can be applied for online, which has eased some of this challenge. There are challenges to importing consumable items for events, even when local produce is unavailable, or difficult to source. For example, media photographers need to follow specific processes to obtain permission for filming in different countries, and this responsibility rests with the

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[39] Harris, N. (2018) Tour de Wilderness, Presentation given at the SADC/GIZ Expert workshop on development of a guideline on cross-border tourism products in SADC TFCAs, Southern Sun Hotel, OR Tambo Airport, 30-31 January 2018

[40] https://www.victoriafalls-guide.net/univisa-zimbabwe-zambia.html

[41] Bollman, M., et al, 2015, op. cit

[42] Bollman, M., et al, 2015, op. cit

[43] Bollman, M., et al, 2015, op. cit

[44] Bollman, M., et al, 2015, op. cit

photographer rather than a tour operator. In some instances, the regulations for importation of goods are unclear, change frequently, and are not understood by tourists and tour operators. Tour operators surveyed indicated that moving vehicles between countries is very expensive (particularly into Zimbabwe), and that searches of fully equipped vehicles by border officials were problematic.

- **Tax:** Business taxation is considered too high and cumbersome in some SADC countries,[45] and the VAT rates and processes differ in each country. For example, one tour operator indicated that at Beitbridge there is a road and bridge tax, and also insurance that needs to be paid for, making travel to Zimbabwe from neighbouring states expensive.

> Tour operators were asked if they were interested in a loyalty system to make travel, permits and work within TFCAs easier, and 82% said that they would (n=23).

- **Corruption:** The large number of regulations and the complexity of bureaucracy, and lack of understanding of legal requirements, make cross-border travel prone to corruption. Tour operators complain that in almost all SADC countries there is need for so-called spontaneous fees and informal payments to border officials. [46]

- **Clarity of processes:** For cross-border event organisers, there can be high levels of frustration with unclear processes, many meetings required (often at short notice, at operators own cost), and the lack of capacity and effectiveness of TFCA support staff, with no clarity or guarantee that the necessary permissions will arrive in time. There is no clarity on the process, responsible personnel, or on the time it should take for a permit to be processed. For example, immigration and customs officials may only be involved late in the planning process, whereas they should ideally be involved during initial discussions. For example, in planning a Wildrun event, it was deemed most effective for information to be communicated with the South African border officials, who informally shared it with Botswanan border officials. By contrast, if formal border crossings are used for cross-border trails, then no permit would be required by operators to use it (e.g. proposed Maloti-Drakensberg 4x4 trail) – simply the appropriate infrastructure needs to be in place and clear description of the routes available. One operator remarked that there was "far too much paperwork and hassle if you only have few cross-border tours per year. All the red tape is a nightmare for a small company," while another stated "compliancy is difficult and prohibitively expensive." One operator also indicated that "Tours are designed according to market demand and not country specific rules and laws" Tour operators surveyed requested better information, including maps, border times, and routes to facilitate travel.

- **Financial and reputational risk:** If a tour operator has to cancel a cross-border tourism product because necessary permissions were not issued in time, they have to reimburse their clients the entire cost of their trip – including their international flight. This is a high-level risk for annual and bi-annual event organizers. This is a very high level of risk to take on, and there is no re-course for the operator if permission is not provided on time.

- **Accountability:** Stakeholders report instances where an MoU relating to a cross-border tourism product has become lost between departments and a paper trail is lacking. They also indicated that personnel within tourism and conservation teams do not necessarily talk to each other. In other instances, personal relationships built over time between cross-border tourism product proponents and personnel on the ground are a key factor in success or failure, but the lack of institutional memory means that when staff are replaced, these need to be re-established from the start.

- **Delegation of responsibilities**: Usually the security cluster (i.e. police, immigration, customs) is responsible for controlling cross-border access for tourists, tour operators and their equipment. To facilitate certain cross-border tourism products it may be more efficient and effective to

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[45] Bollman, M., et al, 2015, op. cit
[46] Bollman, M., et al, 2015, op. cit

delegate certain responsibilities to protected area officials, or others, particularly for undesignated border crossings.

In some TFCAs there is a prevalence of illegal activities associated with the cross-border movement of people, poached wildlife, drugs, stolen goods and also veterinary controls (e.g. Great Limpopo TFCA), which are recognized by TFCA developers and tour operators. In these TFCAs, the challenges are greatest because provision to make easier cross-border movement of tourists are perceived as either dangerous, or that they could contribute to exacerbating difficulties in controlling illegal activities and veterinary precaution.

5.2   SUPPORT UTILITIES AND INFRASTRUCTURE

This section provides a brief overview of support utilities and infrastructure for cross-border tourism, in relation to airports and air transport services, roads, border posts, police and others.

- **Air transport services:** On international routes few foreign airlines are linking a SADC Member State to the rest of the world due to bilateral air service agreements (with the exception of Member States including South Africa, Mauritius and the Seychelles). Many SADC Member States only offer a small number of airlines operating on domestic, regional and international routes. In addition, some Member State national carriers (e.g. in Mozambique, Angola, Zimbabwe) still dominate domestic travel routes. In several countries low cost carriers are prevented from operating on

domestic air networks. Air transport management is of varying quality in SADC countries.[47]

- **Airports:** Many regional airports are undersized and sometimes even unpaved. Such airports do not allow the operation of commercial airliners, especially jet aircrafts. The lack of sufficient and affordable airline access has severely limited SADC tourism development. Countries and regions with limited air service are subjected to significantly higher fares than those that enjoy greater market competition.[48]

- **Roads:** The road network in SADC is extensive enough to allow cross-border tours between most destinations, except for non-existent ferry services between the Indian Ocean island Member States. However, travel distances in SADC are large, road conditions 'off the beaten track' are usually poor, and travel times can take much longer than expected[49] (see Figure 7). One tour operator remarked, "Roads are APPALLING on the Zimbabwe side, especially Beitbridge to Shashi Village. TERRIBLE!!"

- **Border posts:** As indicated above, while some existing land border posts between SADC countries and TFCAs operate smoothly, others present a challenge for cross-border tourism. There are few immigration counters, no separate lanes/counters for domestic, SADC and international passport holders, or for tourist and truck drivers, which mean that tourists face lengthy delays.[50] Tour operators surveyed indicated that ablutions at border posts were not to standard.

- **Police:** According to several reports, police constitute part of security problems, especially when poorly paid and corrupt police officers extort bribes from traffic offenders or business people for arguably minor offences. Madagascar, Zimbabwe, Mozambique and Lesotho reportedly have the least reliable police services among SADC countries.[51] Self-drive tourists in remote areas can be targeted by corrupt police officials.[52]

If more border crossing options were available within TFCAs, then the movement of tourists within them would be quicker, easier, and a better quality of experience would be provided. Existing border posts need improvement, as does other infrastructure to improve connectivity within TFCAs. In some instances, a border post is only in one country (e.g. in the Maloti Drakensberg TFCA), which means that a tourist entering Lesotho from South Africa does not officially enter Lesotho, even if they require a visa.

Figure 7: Perception of regional road network[53]

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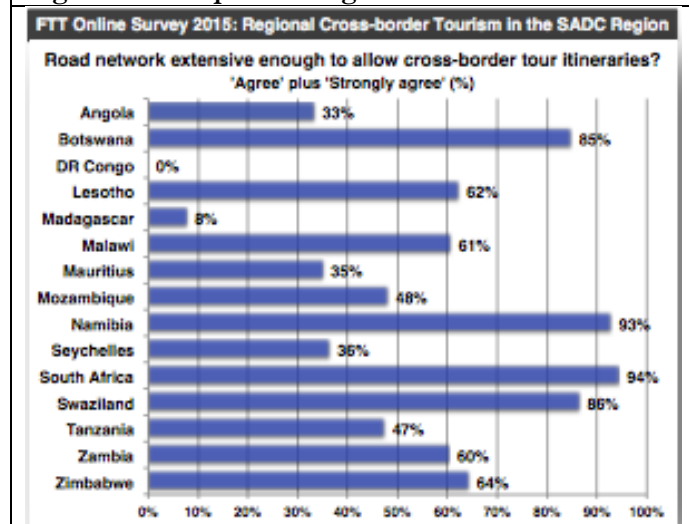
[47] SH&E 2010 / ICF International: Competitive Africa: Tourism Industry Research Phase II. Air Transport Sector Study, World Bank, November 2010, cited by Bollman, M., et al. (2015) op. cit.

[48] SH&E 2010 / ICF International: Competitive Africa op. cit

[49] Bollman, M., et al, 2015, op. cit

[50] Bollman, M., et al, 2015, op. cit

[51] Bollman, M., et al, 2015

[52] Bollman, M., et al, 2015, op. cit; Rylance, A.(2014) Analysis of the economi conditions relating to tourism in Mozambique, Study 16 for the Preparation of MozBio, 18 August 2014, final report to the World Bank; https://www.export.gov/article?id=Madagascar-corruption; https://www.newsday.co.zw/2017/07/corruption-roadblocks-major-threats-tourism/; http://www.lestimes.com/corrupt-cops-kill-tourism-ltdc/

[53] Bollman, M., et al, 2015 op. cit, based on 126 survey responses from tour operators and companies involved in southern African tourism.

5.3   RECOMMENDATIONS

There are a series of recommendations to improve the enabling environment for cross-border tourism products in SADC arising from the literature and the stakeholder consultation process. Some of these could be taken forward to the SADC technical committee meeting agendas to drive change at national government level, and SADC regional level. These should be considered in light of national policies, and also policy harmonization efforts in the region. The recommendations for consideration include:

1. Allow free movement of tourists, staff and equipment within a TFCA, with exemption for immigration and customs (i.e. create TFCA free trade zones):

- **Scale up the univisa from Zimbabwe/Zambia to the KAZA TFCA, and then SADC,** through improved collaboration within SADC, to allow unfettered access for TFCA tourists between countries. Address issues of security of movement within TFCAs through this process.
- **Establish tourist-only border crossing points,** to reduce congestion among freight and tourist traffic.
- **Establish TFCA exemptions** for immigration, import/export duties, and movement of labour. Understand that the supplies and labour are used for the cross-border tourism product, for a limited period of time, and will not remain in other countries.
- **Establish TFCA work permits**, to allow guides, drivers and tour operators to work freely within and between TFCAs, cognizant of sovereignty concerns. Standardize minimum requirements and guide fees within TFCAs.
- **Establish single pay-points at TFCA 'gateways' with a smart-card fee/levy/tax management system.** Simplify the broad range of fees that tourists pay for vehicle taxes, park gate fees and tolls, which create stress and cause delays for tourists.[54] For example, a single TFCA entrance fee, valid for all countries.
- **Reduce costs,** including visa fees and conservation fees (particularly double-park entry fees) which cumulatively are costly and numerous. [55]

2. Establish a delegated and decentralized authority to enable operationalization of cross-border events and regular-departure products.

- **Delegate responsibility** to perform immigration services to protected area officials in TFCAs, with appropriate training. Empower private partners to perform management activities on the ground.
- **Build responsibility and management for cross-border tourism products into the terms of reference (and key performance indicators) for TFCA and security cluster staff**. This will improve institutional memory and clarify roles and responsibilities for cross-border tourism product support and facilitation.
- **Create "tourism officer" positions, either for all TFCAs, or for individual TFCAs.** The tourism officers (with adequate skill and capacity) could act as a 1-stop-shop facilitator and focal points for new and operational tourism events, cross-border tourism products, investors, concessionaires, and tour operators using TFCAs in their itineraries. The tourism officers would help operators to obtain necessary permits and permissions in a timely and efficient manner, to reduce the transaction costs to the private sector. They would facilitate necessary consultative meetings required for the cross-border tourism products, including with the security cluster (i.e. police, immigration, customs), affected communities and their representatives. They would also coordinate M&E, and environmental, financial and socio-cultural reports on the impact.
- **Integrate cross-border tourism products into protected area management plans**, and associated tourism plans, for approval by relevant authorities (e.g. Council of Ministers of a TFCA). Formalize undesignated crossing points in TFCAs.

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[54] Boonzaaier, W. V., Young, A., Attwell, B., and Lombard, D. (2013) Kavango Zambezi Transfrontier Conservation Area (KAZA-TFCA) – Harmonisation of natural resource management and tourism, Contour Project Managers cc & Associates, May 2013
[55] Adapted from O'Leary, G. (2014) Operating in the TFCAs: The voice of experience, Presentation at the Conference on Guidelines on concessioning and sustainable tourism investment in TFCAs in SADC, Garden Court OR Tambo, South Africa, 2-3 September 2014

3. Establish permissions for a product, rather than a specific event or tour occurrence, so that new applications for the same permissions are not required each time.

- **Establish concessions and/or permit for multi-year cross-border tourism products** (e.g. 5-year agreements) approved at ministerial and Joint Management Board (JMB) levels.
- **Establish Standard Operating Procedures and a clear flow diagram** and for permissions and processes for cross-border tourism products and permitted activities. Include clarity on the roles of different TFCA stakeholders, the stage and timing of their involvement (e.g. involving the security cluster early in the process), and the timeframe for delivery of permissions.

It is notable, and concerning, that several of these recommendations to improve the enabling environment have been made in previous reports over the past five years[56], and yet they still persist. In order to fully implement their regional SADC agreements (i.e. notably the SADC Protocol on the Development of Tourism, 1998[57] and the Protocol in Trade in Services, 2012[58]), and capitalize on cross-border tourism opportunities for sustainable economic development, action needs to be taken to remedy these systemic challenges. If not, these problems will continue to constrain TFCA tourism into the future, and TFCAs will remain uncompetitive for investment and travellers. As one stakeholder said, cross-border tourism products, " . . . breathe life into the treaties, and contribute towards implementing their objectives."

6   GOVERNANCE

Cross-border tourism product owners and developers were asked about their governance arrangements in the online survey and interviews. Governance relates to the process of decision-making, and the process of implementing decisions. Most respondents indicated that they had developed partnerships and outsourced various services to support the product (see Figure 8 below). Interestingly, around half indicated that they did not need to set up a business structure for the product. This is because most products were nested within existing institutions (e.g. TFCA committees, existing companies) and so did not require them.

Figure 8: Governance of cross-border tourism products in SADC (n=9)
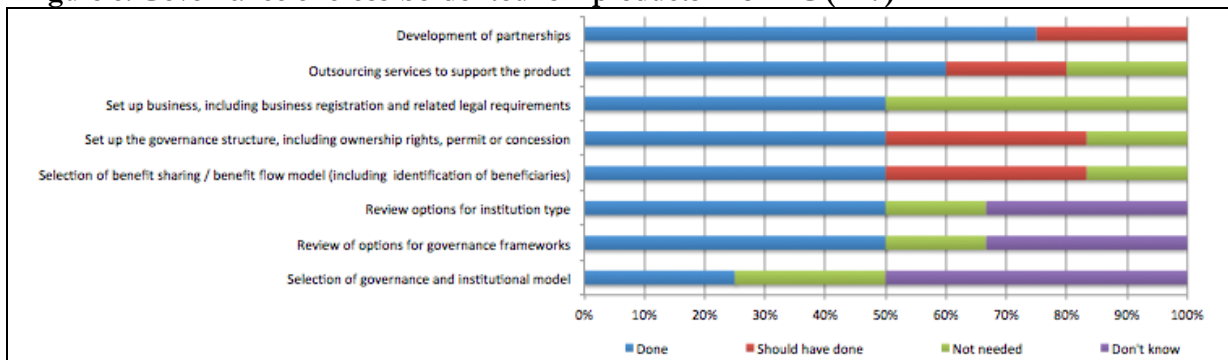
Associated with this, stakeholders were asked about their stakeholder consultation processes. Nearly all respondents had undertaken stakeholder identification activities, and had established stakeholder buy-in to the product, with associated coordination and communication, engagement and consultation (see Figure 9 below).

Figure 9: Stakeholder engagement (n=10)

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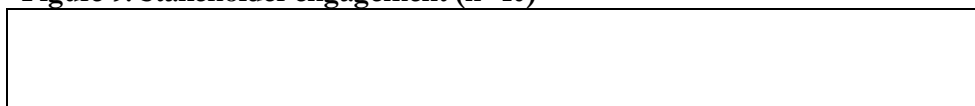
[56] e.g. Boonzaaier, et al, 2013 & Bollman, M., et al, 2015 op. cit
[57] Southern African Development Community (SADC) (2012) Protocol on the development of tourism (1998) Accessed from http://www.sadc.int/files/2413/5292/8368/Protocol_on_the_Development_of_Tourism1998.pdf on 18 September 2013
[58]   Southern   African   Development   Community   (SADC)   (2012) http://www.sadc.int/files/7313/6439/6118/Protocol_on_Trade_in_Services_-_2012_-_English.pdf
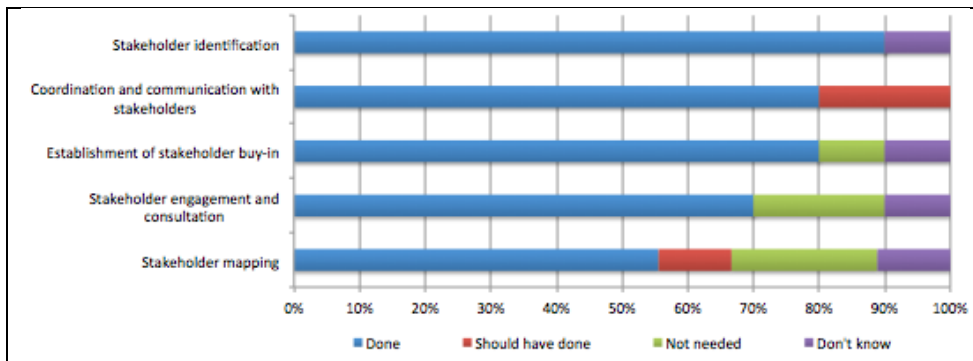
6.1   INSTITUTIONAL STRUCTURE

There are two main types of institutional structure currently used by existing cross-border tourism products: government, private sector and partnerships. Private sector operations include for-profit (e.g. Richtersveld and Mapungubwe Wildruns) and not-for-profit (e.g. Tour de Tuli) arrangements. Existing partnerships include between government and parastatals (e.g. Desert Knights and Desert Kayak Trail), and government, private sector and community (e.g. KAZA Golf Classic; Pafuri Cross-border Trail and Shangaan Festival).

Table 6: Governance structure for existing cross-border tourism products

Business model	Types of partners	Examples	Private partners	TFCA partner
Partnership	Government and private sector	Kavango Zambezi Golf Classic	ZimParks, and golf clubs with contracted operator.	KAZA TFCA
	Government and parastatal	Desert Knights	NWR, SANParks, DEA, supported by PPF & Boundless Southern Africa	Ai /Ais-Richtersveld Transfrontier Park.
		Desert Kayak Trail	NWR, PPF, African Paddling Association	Ai /Ais-Richtersveld TP
	Government, private sector and community	Pafuri Cross Border Trail and Shangaan Festival	Return Africa, Shangaan community	GLTFCA
Private sector	Non-profit	Nedbank Tour de Tuli	CITW supported by Nedbank, Wilderness Safaris, PPF, Boundless SA and others	Mapungubwe TFCA
	For-profit	The Namibia Crossing[59]	Wildrun Africa	Ai /Ais-Richtersveld TP
		Safari on the run[60]	Wildrun Africa	Mapungubwe TFCA

Key: NWR = Namibia Wildlife Resorts; SANParks = South African National Parks; DEA = Department of Environmental Affairs, South Africa; CITW = Children in the Wilderness; PPF = Peace Parks Foundation; ZimParks = Zimbabwe Parks and Wildlife Management Authority

6.2   GOVERNANCE ARRANGEMENTS

The governance of partnerships (i.e. the process of decision making, and by which decisions are implemented) is underpinned by Memorandums of Understanding (MoU) between participating partners (e.g. Great Limpopo TFCA and Return Africa). Some partnerships do not have MoUs (e.g. Desert Knights) clarifying the roles and responsibilities for delivering an event, which means that one partner may invest and/or benefit more than another. The institutional arrangements in different SADC TFCAs also vary.

The products are managed and coordinated by different committees, and decisions are made within these forums, and recorded in minutes.   Individual champions drive some products, but they can face considerable challenges and frustration in engaging with local implementing partners. This is especially challenging if they do not share the same interest for the product, or are ineffective in their jobs, or where decisions taken during committee meetings are not implemented by those responsible. For example, there were several reports from stakeholders of TFCA personnel not responding to emails or messages, and of permit requests or reports being lost.   Communication and coordination needs considerable improvement, including between ministerial levels, TFCA structures (e.g. coordinators and Joint Management Boards [JMBs]), and those working on the ground (e.g. security cluster personnel, community members, contractors).

In the case of the KAZA Golf Classic, the TFCA Unit establishes simple sub-contract agreements with a tour operator and golf courses to operate the event. For other events, there are also sub-contract agreements with service providers, such as caterers, campsites, transport providers, guides etc.

In South Africa, the Public Finance Management Act has provisions that regulate Public Private Partnerships (PPPs). The National Treasury has a Toolkit which provides a framework for implementing PPPs in state controlled game reserves and national parks. All agreements now require National Treasury

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[59] Formerly run as the Richtersveld Transfrontier Wildrun
[60] Formerly run as the Mapungubwe Transfrontier Wildrun

approval and a defined process must be followed[61]. Multi-year cross-border tourism products could fit under the small-capital expenditure PPPs category of these.

For private sector products (whether for-profit, or not-for-profit), decisions are made within each institution (e.g. Wildrun, or CITW). For example, CITW has a committee responsible for the tour that meets three times a year. Operational success strongly relies on strong communication, collaboration and effectiveness of support agencies – notably the TFCA unit and security clusters. These products do not have MoUs, concessions or licenses for an extended period of time, but tend to operate from year to year.

The lack of multi-year concession or licenses for products operated by the private sector, is the annual challenge of security permits and other permission in time for the event to take place. Each time the event is planned, brand new permits and permissions are required, and there is no formalized institutional memory to ensure efficiency. Success can be ad hoc, and is sometimes dependent on trust between partners and good working relationships. When key personnel move on, new relationships need to be established with their successors. This piece-meal approach is inadequate and inconsistent, and needs to be improved.

6.3   BENEFIT SHARING

Benefit sharing arrangements are largely dependent on the institutional model used. For example:

- For **private sector models,** revenues accrue to the operator, and profits are realized once the product's costs have been paid for. For example, in the case of Tour de Tuli, profits are used to support philanthropic activities. Between 2006 and 2017 the profits were used for 5600 children to participate in an Eco-Club camp in 6 SADC countries, as well as training 675 Eco-mentors, and supporting 2354 primary, secondary, tertiary scholarships and Southern Africa Wildlife College scholarships.[62]
- For **partnership models**, revenues and profits are allocated in relation to the product MoU and committee decisions. For example, in 2014 Desert Knights used surplus funds of USD30,450 to pay for additional equipment to be able to host future events. The remaining funds were held in an operating account for the /Ai/Ais Richtersveld Transfrontier Park, and spent on joint operations by Namibia and South Africa as identified by the Park Management Committee. [63]
- Benefits do not only relate to profit-sharing, but also the way in which operational expenditure is distributed. For example, Safari on the Run, Mapungubwe, generated direct financial benefits of USD 21,731 to the Maramani community and Zimbabwe through salaries, camping and traversing fees and the purchase of consumables in 2017 (see Figure 10). There have been discussions about how operational expenditures for support services, equipment, and provisions should be equitably distributed between countries. Options include:

  - ➢ **Equal distribution of expenditures between countries**, with an equal percentage split between the number of participating countries, regardless of effort (e.g. entrance fees to the Kgalagadi TP).
  - ➢ **Distribution of expenditure in relation to services provided**, in relation to local costs (e.g. if labour in one country is more expensive than another, then the locally accepted rate would be paid). (e.g. drivers in one country may be paid USD150 per day, but USD100 in another country, for the same service).
  - ➢ **Equal payment for similar services in each TFCA country**, with the same salaries or payments being made for the same service in each country (e.g. all drivers would be paid USD150 per day, regardless of the country of work).

Figure 10: Safari on the Run, Mapungubwe by numbers (in ZAR)[64]

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[64] Middleton, O. (2018) Elemental Outdoor: Explore, Discover, Eperience, Wildrunner.co.za, Presentation given at the SADC/GIZ Expert workshop on development of a guideline on cross-border tourism products in SADC TFCAs, Southern Sun Hotel, OR Tambo Airport, 30-31 January 2018

Complexities also arise with benefit sharing when there is a lack of clarity and agreement of how benefits are shared. Ambiguity in relation to benefit sharing has led to unrealized expectations, frustration, and distrust, and a lack of motivation in some instances. For example:

> ⊳ 80 runners: 79% SA, 21% International
>
> ⊳ 47 crew: 18 Maramani (38%)
>
> ⊳ Consumables purchased in Zim: R120,000
>
> ⊳ Camp & traversing fees paid to BBRDC: R102,000
>
> ⊳ Maramani temp employment paid: R39,855
>
> ⊳ TOTAL direct BBRDC community benefit: **R261,855**
>
> ⊳ EAV: R3.3 million

- Cross-border tourism product operators may have **no pre-defined agreement on how expenditures should be distributed** between countries, nor a clear reporting framework for products to report actual payments made. However, a lack of transparency of how payments for goods and services are distributed between each participating country creates tensions and distrust, particularly where products are perceived to be financially successful (e.g. Tour de Tuli), and some partner's expectations are not realized. However, the lack of concession agreements or MoUs means that private operators are not obliged to share this information.

- **Community beneficiaries may not be clearly defined.** For example, the designated authority for receiving and distributing community benefits from tourism (including sport hunting), in Zimbabwe is the Rural District Council (RDC). However, there have been reports of payments for services provided to cross-border events being paid directly to the community providing them, rather than through the RDC for distribution. Establishing dual processes, however well intentioned, can disrupt existing governance processes, and identification of the beneficiaries needs to be done through a consultative process. It is important to be mindful of, and follow, recognized procedures for distributing money to communities.

6.4   RECOMENDATIONS

In terms of governance, recommendations include the following:

Institutional structure:
- **Establish clear ownership of cross-border tourism products**, including the intellectual property, and also equipment and tenure (i.e. permit or concession period).
- **Develop guidance on the types of contractual arrangements** that allowable for cross-border tourism products (e.g. PPPs, permits, MoUs including their time period etc.), and establish these.

Governance arrangements:
- **Establish a strong decentralized institutional framework for the TFCA,** and delegate and devolve responsibility for cross-border tourism product preparation and organization for practicality. Give champions, leaders and drivers (and those who have the capacity and knowledge) authority they require to organize successful cross-border tourism products.
- **Establish a single point of contact for cross-border tourism product developers,** including coordination of permissions and processes**.** (This can be a contact point for other tourism in the TFCA – not just cross-border tourism products).
- **Government and protected area authorities should recognize that the private sector can be partners, not adversaries**, in the establishment of mutually-beneficial cross-border tourism products. [65]

[62] Pers Com. N. Harris, CITW, February 2018; Janet Wilkinson, CITW, March 2018

[63] Pers Com. P. Bewsher, PPF, 2014; Pers Com. R. Vorwerk, Boundless SA, 2014

[64] Middleton, O. (2018) Elemental Outdoor: Explore, Discover, Eperience, Wildrunner.co.za, Presentation given at the SADC/GIZ Expert workshop on development of a guideline on cross-border tourism products in SADC TFCAs, Southern Sun Hotel, OR Tambo Airport, 30-31 January 2018

[65] O'Leary, G. (2014) op. cit.

- **Agree on accountability for communication and coordination processes,** including how decisions are taken (i.e. by whom, and within what timeframe).
- **Establish multi-stakeholder engagement forums**, such as TFCA committees at concept stage to mitigate barriers and promote partnerships.
- **Maintain a clear record** of decisions made, permission requests submitted and decisions made (i.e. a clear paper trail), within the TFCA structure (e.g. the JMB).
- **Development of Standard Operating Procedures** for cross-border events for each TFCA, and ensure approval by JMBs.

Establish clear plans for benefit sharing during product preparation, including:
- who benefits from revenues and profits;
- who is responsible for payment of costs during planning and operation (e.g. human resources, equipment, stakeholder identification, consultation processes, coordination);
- how operational expenditure is allocated between countries and service providers (e.g. in relation to local costs; level of effort);
- how benefits are distributed, and on what basis (e.g. equal share, or in relation level of effort); and
- a clear and agreed monitoring and reporting framework.

7   FINANCIAL ELEMENTS

Cross-border tourism product operators were asked where they had raised their product development finance. The majority of respondents had used funds from donors and grants, followed by private sector and government resources. Around half thought that commercial banks should have been approached for finance (see Figure 11 below).

Figure 11: Source of finance for cross-border tourism products (n=9)
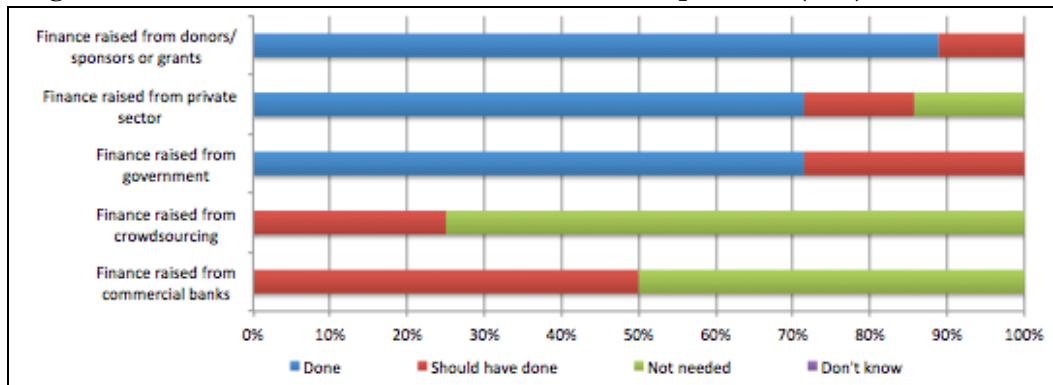
7.1   SECURING FINANCIAL RESOURCES

Investment can be provided from a range of sources, including government and private sector. Funding options that are applicable to cross-border tourism products in TFCAs are outlined in the table below, with examples of products that have used them.   Cross-border tourism product operators may use multiple sources of finance within their financing strategy. There are challenges for private sector operations to secure capital investment for cross-border tourism. These include that donors may have highly bureaucratic processes, with lengthy delays between a proposal being submitted, awarded, and funds actually being released. For example, traditional banks can be used for asset finance (e.g. vehicle loans). [66]

Table 7: Financing mechanisms for cross-border tourism products[67]

Financing Mechanism	Description	Examples
Direct funding and donations	Direct central government support through central budgets.	Wildrun Desert Knights
	Parastatal and other arrangements in which some revenue generated by user fees and other mechanisms is retained by the management agency.	
	Extra-national funding from international donors and NGOs. [1]SEP	Desert Knights Lebombo Ecotrails KAZA Golf Classic
	Private sector funding, including for protected areas or public private partnership agreements.	Wildrun Desert Knights
Tourism User Fees	Protected area entry fees, activity fees, recreation license fees and special access payments, hunting fees and green safaris and voluntary contributions from tourists and tourism operators.	Tour de Tuli Desert Knights KAZA Golf Classic

The /Ai-/Ais Richtersveld sustainable financing strategy[68] incorporates a financial analysis of existing cross-border tourism products, including Desert Knights, Desert Kayak Trails and the Pontoon at

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[66] Adapted from O'Leary, G. (2014) Operating in the TFCAs: The voice of experience, Presentation at the Conference on Guidelines on concessioning and sustainable tourism investment in TFCAs in SADC, Garden Court OR Tambo, South Africa, 2-3 September 2014

[67] Adapted from Prime Africa Consultants (2014) Development of a sustainable financing strategy for the /Ai-/Ais Richtersveld Transfrontier Park, Final Report, 18 December 2014, Report to GIZ

[68] Prime Africa Consultants (2014) Development of a sustainable financing strategy for the /Ai-/Ais Richtersveld Transfrontier Park, Final Report, 18 December 2014, Report to GIZ

Sendelingsdrift. It also reviews potential new investments including the Gamkab Tourism Hub, fly camps, and vehicles. The analyses include a review of capital expenditure requirements, management and staff costs, a cashflow and capital expenditure forecast based on predicted occupancies, and also a review of financing options. A Discount Cash Flow model developed from the data predicted that for the entire ARTP there would be a net revenue of USD 111,669 (N$ 1,395,862) by 2020/21, starting from a USD 20,025 (N$ 250,315) deficit in year 2015/16. This type of analysis is a valuable tool that could be used by all TFCAs to clearly review the financial potential of existing and proposed cross-border tourism products. It can also be used to inform a business plan, and to seek capital investment, and will form the basis of a template for the Guideline. Financing plans need to incorporate depreciation, loss and replacement of equipment, and also indicate the source and value of investment.

The success of securing financial resources from government and donors can be related to the predictions of benefits flowing into local communities, and in to the local economy.

Some challenges in financing include:

- **Cash flow.** For example, Desert Knights faced cash flow problems relating to over subscription of the event in relation to the amount of equipment available in 2014. This meant that the event had to be scaled back from 120 to 100 participants, and also that equipment from the first nights camp had to be taken down and moved during the event to accommodate people at a different location on the fourth night.
- **Sponsorship and scale.** Hosting small-scale events can create challenges for fundraising from corporate sponsors, who are more interested in supporting higher-profile events with thousands of participants.
- **Uncertainty.** Securing capital investment can be challenging because of the risk and uncertainty inherent in the planning and operation of the events (e.g. delayed permissions and permits).

7.2   REVENUES AND COSTS ASSOCIATED WITH CROSS-BORDER PRODUCTS

Neither the financial and in-kind costs required to establish new cross-border tourism products, nor the benefits that they create, are entirely clear. For example, the main costs associated with establishing a new cross-border tourism product relate to the time, energy and effort to organize them, and the opportunity costs of planning a product within a country, rather than across international borders within a TFCA. Some costs are reduced through the use of volunteers to provide support (e.g. Tour de Tuli uses around 90 volunteers per event). These types of costs, and in-kind contributions, are not often elaborated in accounting systems, which makes the real costs (and associated profits) difficult to judge.

For example, while Desert Knights was owned and operated by park managers from the 2010 pilot, a ToR was developed to transfer it to a private concessionaire in 2012. However, a field trip with operators revealed that it was not a viable commercial proposition for the private sector, because the associated costs were prohibitive. The range and extent of state resources employed in supporting the event (as in-kind contributions) would be impossible for the private sector to provide without adequate cost recovery, and so this would dramatically inflate the cost for tourists to participate. In such instances, a partnership seems the most practical solution.

In certain instances, the range of fees associated with cross-border tourism can make them uncompetitive. Although outside the scope of this assessment, an example from a cross-border itinerary incorporating Machampane Camp in the Great Limpopo TP can be used to illustrate the costs associated with moving between South Africa and Mozambique (see table below). TFPD has stressed many times over the past decade that operational costs associated with cross-border movement using existing border facilities and protocols make them financially uncompetitive and unattractive to operators and travellers.

Table 8: Comparative cross-border trip costs: Great Limpopo TP and Kgalagadi TP[69]

Accommodation @ Machampane (2 people 3 nights incl. meals and activities)	R 11 760	60%	Based on a three night stay for two people at Machampane (GLTP) vs !Xaus Lodge (Kgalagadi TFP):
Car Hire	R 2 800	14%	— GLTP
Access costs: Car hire co. Cross Border permit	R 2 200		• Accommodation cost R11760
Mozambique Visa (2 people)	R 1 500		• Access cost R5112
Kruger Daily Fee (arrival – 2 people)	R 496		• Access cost vs Accommodation 43,5%
LNP Park Fee (2 people)	R 280		— Kgalagadi
LNP vehicle fee	R 140		• Accommodation cost R19800
Kruger Daily Fee (departure – 2 people)	R 496		• Access cost R1488
Access cost - total	R 5 112	26%	• Access cost vs Accommodation 7,5%
TOTAL COST (2 people for 3 nights)	R 19 672	=R3279 pppn	

The Tour de Tuli raises funds from sponsorship per cyclist, sales of drinks and transport, and sponsor support. Costs associated with running the tour include camp set up, catering, goodie bags for cyclist and

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[69] O'Leary, G. (2014) Operating in the TFCAs: The voice of experience, Presentation at the Conference on Guidelines on concessioning and sustainable tourism investment in TFCAs in SADC, Garden Court OR Tambo, South Africa, 2-3 September 2014

transport. Significant costs are also borne by participating governments (although these are not quantified).[70] In 2013 there was a profit of USD 124,481 (see figure below).

Figure 12: Revenues, expenses and profits for Tour de Tuli, 2013[71]
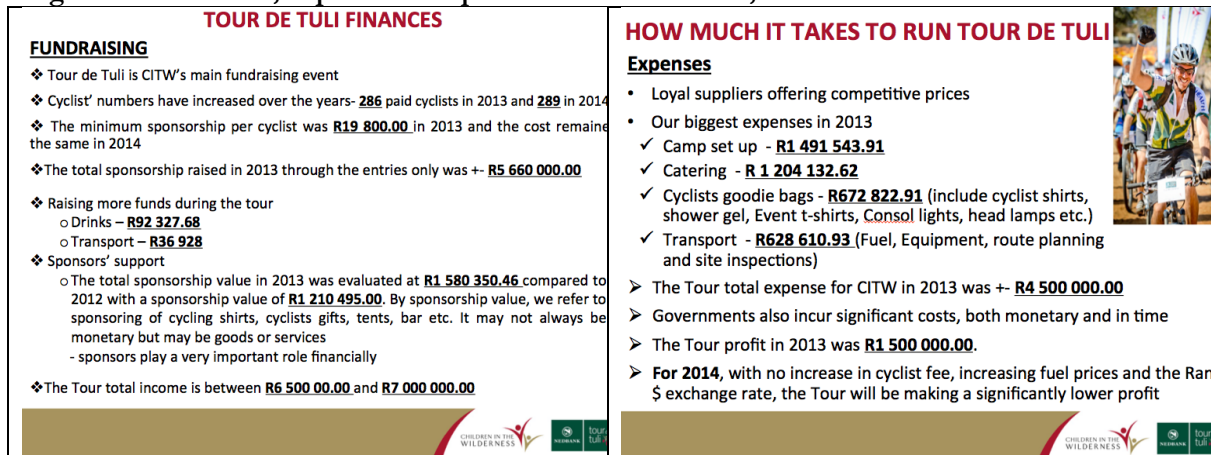
The /Ai-/Ais Richtersveld Transfrontier Park sustainable financing strategy[72] incorporates an analysis of the revenues and costs associated with cross-border tourism products in the park. To illustrate the revenue assumption, revenues and costs, part of this analysis for Desert Knights (bi-annual event) and the Desert Kayak Trails (regular departures) are provided in Annex 9.

As indicated in the section on benefit sharing, there are complexities relating to which enterprises, and communities, benefit from procurement during the operation of cross-border tourism products. Assessing supply chains associated with cross-border tourism products can be instrumental in understanding the current availability of goods and services in local areas, to establish efficient and effective plans for sourcing (prioritizing local procurement where practical), and considering interventions to improve local supply. For example, The Shashe citrus project in (Zimbabwe) has been used to provide fresh produce to both the Mapungubwe Wildrun and the Tour de Tuli.

There are challenges associated with calculating and allocating transaction costs for cross-border tourism products. The amount of time required to participate in consultative meetings, in addition to associated costs, is unpredictable and extensive, which is a burden for private sector operators.

Figure 13: Human resources and equipment for the Desert Kayak Trail[73]

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[70] Snyman, S. (2014) Supporting transboundary conservation and tourism: Tour de Tuli, Presentation at the Conference on Guidelines on concessioning and sustainable tourism investment in TFCAs in SADC, Garden Court OR Tambo, South Africa, 2-3 September 2014

[71] Snyman, S. (2014) Supporting transboundary conservation and tourism: Tour de Tuli, Presentation at the Conference on Guidelines on concessioning and sustainable tourism investment in TFCAs in SADC, Garden Court OR Tambo, South Africa, 2-3 September 2014

[72] Prime Africa Consultants (2014) Development of a sustainable financing strategy for the /Ai-/Ais Richtersveld Transfrontier Park, Final Report, 18 December 2014, Report to GIZ

[73] Whittington, B. (2018) Desert Kayak Trails, Presentation given at the SADC/GIZ Expert workshop on development of a guideline on cross-border tourism products in SADC TFCAs, Southern Sun Hotel, OR Tambo Airport, 30-31 January 2018

In terms of financial management, it is important for partnerships to have dedicated and audited accounts. Tour de Tuli has an online registration and payment system. All participants input their details into the system, and this is used to generate operational manuals for the event (e.g. participant manifests). Online credit card payments and bookings of additional products can also be made through the online system[74]. For Desert Knights, NWR manages a dedicated /Ai-/Ais Richtersveld TP account, with annual audits. The Park Management Committee drafts a budget that is approved by the JMB. However, the operational financing for the event has not been well recorded in the past. Receipts are channeled through NWR, but there has been no audited financial statement for the past two years.

7.3 RECOMMENDATIONS

Recommendations relating to financial elements include:

- **Develop sustainable financing strategies for TFCAs** (using the /Ai-/Ais Richtersveld example as a model), and cross-border tourism products, including capital expenditure requirements, management and staff costs, a cashflow and capital expenditure forecast based on predicted occupancies, and also a review of financing options.
- **Undertake supply-chain assessments for cross-border tourism products,** to understand the current availability of goods and services in local areas, and establish efficient and effective plans for sourcing (i.e. prioritizing local procurement where practical), and plan interventions to improve local supply.
- **Establish cross-border tourism product proposal forms** that indicate the types of benefits and costs that need to be monitored and reported.
- **Establish financial M&E templates** that track the resources invested in cross-border tourism product development and operation by government, including financial and in-kind contributions.
- **Provide incentives** to tour operators offering cross-border tourism product and itineraries (and investigate types of incentive that would be most effective.)
- **Recognise that not all positive and negative impacts are financial**, and some are difficult to monitor (e.g. reducing social grants, sales and taxes). [75]

8 QUALITY OF PRODUCTS

Providing quality cross-border tourism products is important because it reflects on the reputation of the organizers and also the TFCA in which it takes place. The level of quality provided is reflected in the quality of experience, and also the price charged to participants, and potentially in the profits that can be attained.

There are challenges in ensuring product quality where there is a lack of infrastructure, and the logistics associated with organizing suitable accommodation, transport, communications, staff, provision and equipment for complicated and diverse products. Human resource requirements differ between cross-border tourism products, and specific training programs and protocols are required to ensure that they run

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[74] Pers. Com. N. Harris, email, 6 February 2018
[75] Adapted from O'Leary, G. (2014) Op cit.

smoothly. There may be challenges in sourcing good quality personnel (i.e. with adequate skills and experience) in rural and remote areas where cross-border tourism products take place.

In some instances, clients may wish to travel together during a cross-border event, but sleep in a different standard of accommodation that is priced differently. For example, some may wish to camp, while others prefer to stay in a chalet or a luxury lodge.

Some products evaluate the quality of their products through client feedback surveys following events (e.g. Tour de Tuli; Desert Knights). None of the products reviewed use independent evaluations or 'mystery consumers' to check quality. However, media representatives are invited to participate, and publish editorials on events, which can give an indication of the quality of experience.

Product quality can be planned and documented through the use of Standard Operating Procedures to ensure consistency in the product.

9   MARKETING

Tourism marketing plans generally incorporate four 'Ps: Product, Place, Price and Promotion. Some have these have been addressed elsewhere in this document (i.e. see section 4), and therefore this section concentrates on source markets and promotion.

9.1   SOURCE MARKETS

Existing cross-border tourism products tend to focus on the adventure travel market. Adventure travel incorporates two of the following: participation in a physical activity; visit to a natural environment; a culturally immersive experience.[76] Travellers focus on being in a natural environment, learning, and having meaningful experiences, and activities such as hiking, kayaking, rafting, backpacking and trekking.[77] This sector has been valued at USD263 billion globally, and had an estimated growth of 65% between 2009 and 2012.[78]

Most of the existing cross-border tourism products in SADC TFCAs are adventure events (e.g. trail running, mountain bike, canoe, 4x4) (see section 4). Elsewhere in the world, these types of events are being done at greater scale, and value. For example, the Marathon des Sables in Morocco has 1100 participants, a 7-stage 250 km trail run in the Sahara desert costs £3950 to enter (USD 5627 equivalent) and has a 7 year waiting list. The 204 quota of places sold out in 11 minutes.[79] Racing the Planet runs a series of 7 day, 250 km ultra marathons including the Namib race (Namibia), and the Gobi March (China/Mongolia).[80] However, no comparable transboundary events were identified, which means that the SADC TFCAs cross-border tourism products have Unique Selling Propositions (USPs). The Adventure Tourism Development Index, ranks countries in terms of the potential and readiness of countries to compete in the global adventure tourism market. It gives top-five countries rankings for sub-saharan African countries as follows: (1) Botswana, (2) Mauritius, (3) Rwanda, (4) Zambia, and (5) South Africa. [81]   However, some commentators suggest that the market for mountain bike events may have burst, with over 80 events taking place in South Africa annually (including the Tour de Tuli).[82]

A review of market positioning undertaken by Fair Trade Tourism stated that, " . . .for most SADC states the only promising strategy for national tourism development lies in regional networks of cross-border itineraries and marketing the participating countries as a joint tourist destination.[83] This means that more mainstream nature-based tourism products need to be established, linked, and promoted to link cross-border tourism products with tour itineraries.

Tour operators were asked about their top five source markets (n=39). Countries that appeared most frequently in the top five were Germany, UK, USA, South Africa, Switzerland, Austria, Australia, France, Canada and Belgium. Tour operators surveyed agreed that there had been in increase in demand for cross-border tours over the past 5 years, with 25% indicating that it was a 'large' increase, and 58% reporting a 'moderate' increase (n=24). Some of the added benefits of cross-border tours mentioned by tour operators include that multi-country, multi-destination and multi-activity holidays, with a variety of experiences,

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[76] Safarek, G. (2016) Adventure Tourism Development Index, The 2016 Report, 6th Edition, September 2016

[77] Safarek, G. (2016) Adventure Tourism Development Index, The 2016 Report, 6th Edition, September 2016

[78] The George Washington University and Adventure Travel Trade Association. (2013). Adventure Tourism Market Study, cited in Safarek, G. (2016) Adventure Tourism Development Index, The 2016 Report, 6th Edition, September 2016

[79] https://www.redbull.com/us-en/worlds-toughest-adventure-races

[80] Middleton, O. (2018) Elemental Outdoor: Explore, Discover, Eperience, Wildrunner.co.za, Presentation given at the SADC/GIZ Expert workshop on development of a guideline on cross-border tourism products in SADC TFCAs, Southern Sun Hotel, OR Tambo Airport, 30-31 January 2018; racingtheplanet (2018) https://www.4deserts.com/gobimarch/ & https://www.4deserts.com/sahararace/accessed 12 March 2018

[81] Safarek, G. (2016) Adventure Tourism Development Index, The 2016 Report, 6th Edition, September 2016

[82] Online ed (2018) MTB events – has the bubble burst? Features, Ful Sus, Accessed on 17 April 2018 from http://fullsus.co.za/mtb-events-has-the-bubble-burst/

[83] Bollman, M., Bollman, N., Mhlpohe, B., Seif, J., Sturmann, U., and Motaung-Sturmann, L. (2015) Regional cross-border tourim: recommendations for the Southern African Development Community (SADC) Final report, Fair Trade Tourism, GIZ, p12

landscapes, cultures, wildlife coupled with value for money were very attractive products to clients, and so easier to market (n=21).

Table 9: Old, recent and new safari experience trends[84]

Old safari experiences (popular last 50+ years)	More recent experiences (popular last 10 years)	New safari experiences (popular last 5 years and to come)
Game drives (day, night) Game walks Photographic safaris Wilderness trails Backpacker/overland safaris Mobile safaris	Custom safaris Specialist safaris Health spas / massage/ wellness Cultural interactions Recuperation/healing safaris Voluntourism Bush braais Veterinary safaris Horse trails Hot air ballooning Mountainbike trails	Family safaris Adventure tourism Reconnecting Sustainable / responsible / green tourism / ecotourism Sleep outs Star-gazing Citizen scientists

70% of operators surveyed indicated that they currently offered tours in a TFCA (n=36), with the top five being KAZA (63%), Kgalagadi (57%), /Ai /Ais – Richtersveld (50%), Great Limpopo (30%) and Greater Mapungubwe (27%) (n=23). The types of products offered were mainly small- or medium-sized organised tour (<20 pax), and self-drive (n=39). The most popular experiences offered in these cross-border tours were safari (97%), wildlife (94%), adventure (65%), culture (63%), and 4x4 (59%) (n=32) (see **Figure 14** below).

Figure 14: Products and experiences offered by tour operators surveyed

Types of products offered by tour operators surveyed (n=39)	Experiences currently offered on cross-border tours by tour operators (n=32)
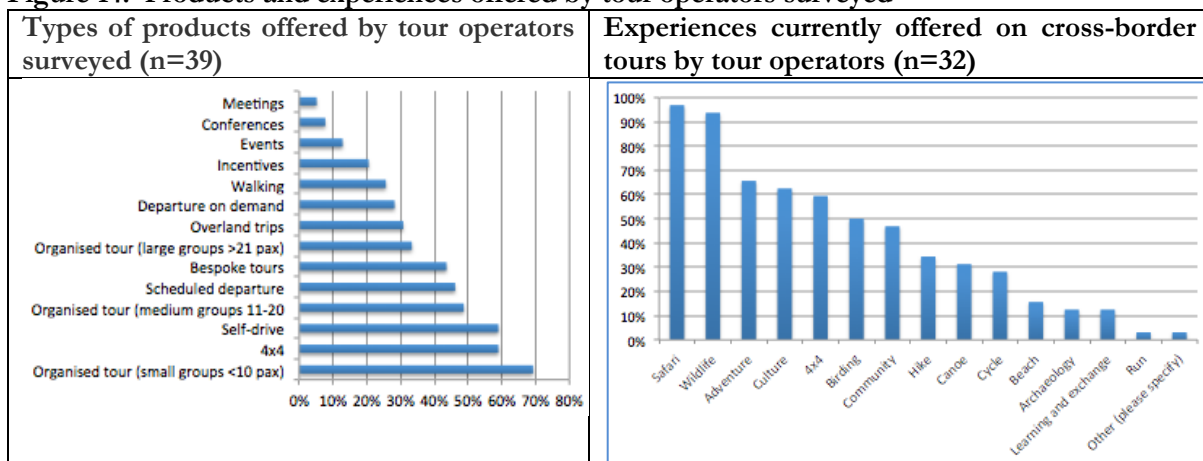
The stakeholder consultation process indicated that there is little awareness of TFCAs as tourism destinations within originating markets, or among international tour operators. Other research also suggests that there had been insufficient marketing and communication at a regional and national level, [85] but these are general statements that required more detailed focus and clarity on what is desired.

9.2   PROMOTION

Promotional activities need to take place at different levels:

- **TFCA destination level** – promoting the destination and its attractions. Currently this is undertaken by individual TFCAs, primarily through websites, and also by Boundless Southern Africa at a SADC TFCA level, and RETOSA for SADC tourism in general. Part of Boundless

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[84] Wright, M. (2014) New tourism trends in TFCAs and protected areas, Presentation at the Conference on Guidelines on concessioning and sustainable tourism investment in TFCAs in SADC, Garden Court OR Tambo, South Africa, 1 September 2014
[85] Bollman, M., Bollman, N., Mhlpohe, B., Seif, J., Sturmann, U., and Motaung-Sturmann, L. (2015) Regional cross-border tourim: recommendations for the Southern African Development Community (SADC) Final report, Fair Trade Tourism, GIZ, p12

Southern Africa's strategy to promote TFCA destinations is to facilitate the development and hosting cross-border tourism products and events with key partners and stakeholder agencies. These include the Tour de Tuli, Desert Knights, Richtersveld and Mapungubwe Transfrontier Wildruns, KAZA Golf Classic, Pafuri Cross-border Trail and Shangaan Festival. National Tourism Organizations also promote protected areas within their countries, including those that form part of TFCAs.

- **Product level** – promoting specific cross-border tourism products to clients (i.e. tourists), and to intermediaries (i.e. travel agents and tour operators). Sometimes this is done by the product owners independently, and sometimes in partnership with National Tourism Organisations or through Boundless Southern Africa.
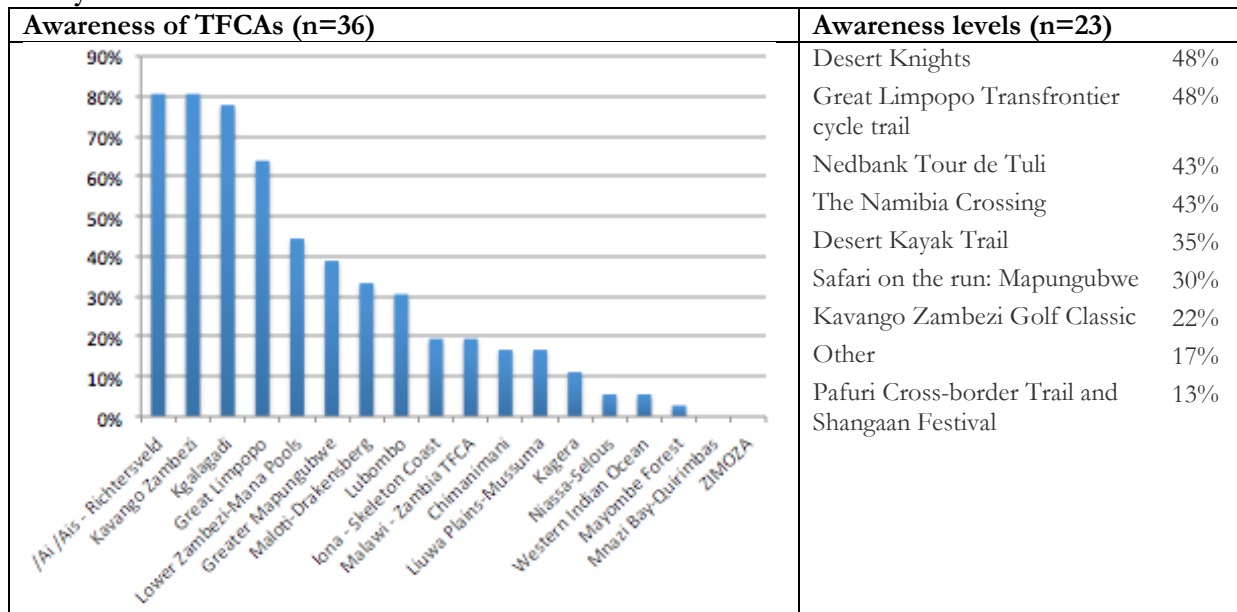
Figure 15: Selection of cross-border tourism product logos
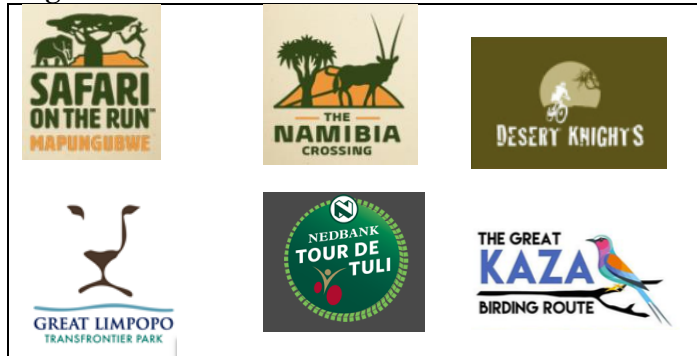
Boundless Southern Africa has a database of over 1000 people who have participated in Desert Knights previously. However, the databases held by the different cross-border tourism product organizers in SADC are not currently shared, and there is no collaborative promotion between the cross-border events. Tour operators surveyed suggested that sharing this information would help to promote cross-border tourism. This is currently a missed opportunity and could potentially be part of the reporting provided by operators in TFCAs.

This study found that there was generally a good level of awareness internationally of SADC TFCAs among tour operators surveyed (see **Figure 16**). The five top TFCAs known were, the /Ai /Ais – Richtersveld (81%), KAZA (81%), Kgalagadi (78%), Great Limpopo (64%), and Lower Zambezi-Mana Pools (44%). There was a lower level of awareness of existing cross-border tourism products, and over 40% of tour operators surveyed were aware of Desert Knights, the Great Limpopo TFCA cycle trail, Nedbank Tour de Tuli, and the Namibia Crossing (see **Figure 16**).

Figure 16: Awareness of TFCAs and TFCA cross-border tourism products among tour operators surveyed

Awareness of TFCAs (n=36)	Awareness levels (n=23)	
	Desert Knights	48%
	Great Limpopo Transfrontier cycle trail	48%
	Nedbank Tour de Tuli	43%
	The Namibia Crossing	43%
	Desert Kayak Trail	35%
	Safari on the run: Mapungubwe	30%
	Kavango Zambezi Golf Classic	22%
	Other	17%
	Pafuri Cross-border Trail and Shangaan Festival	13%

There is a need for more extensive and effective promotion at both of these levels, including active promotional campaigns with the travel trade. In some instances, ambassadors can be used (i.e. iconic

individuals and brands). This requires strong visuals (including video and photography) and targeted marketing that is directed towards source markets, and profiles (e.g. adventure tourists, those interested in conservation and communities). Suggestions from tour operators included the use of more trade fairs where operators could discuss TFCAs; sharing data of past clients with others; magazines and newsletters; and providing better information and points of contact with tour operators. They were also supportive of a joint-marketing platform for TFCAs with all relevant information (e.g. policies, regulations, structures, contacts, maps, accommodation, activities etc.).

The table below describes the main distribution and promotion channels used for cross-border tourism, with examples of current cross-border tourism products that use them.

Table 10: Distribution and promotion channels

Channel	Description	Examples
Sales through agencies tour operators	Domestic and foreign travel agencies and is aimed at two generic segments: foreign tourists who buy travel packages and domestic tourists who make use of package tours. Agents take 30% commission. Incentives could be provided (e.g. for every 10 clients booked, 1 free space given to the agent).	Sales of cross-border tourism products with combination of other services and activities (e.g. Wigwam). Being explored by Tour de Tuli.
Trade and tourism exchanges	Fairs and exhibitions allow the sale of products to intermediaries and the general public, and establish personal contact between different private and public tourism businesses.	Boundless SA promotion of TFCAs at ITB. Product promotion at Indaba.
Press releases	These can be used to promote upcoming cross-border experiences, or share stories of recently completed events.	Wildrunner's use of a dedicated emailer to distribute messages to digital magazine subscribers. [86] Desert Knight's use of newspaper reports and magazine features.[87]
Internet	Web sites, emails, web advertising, social media. Most cost effective to use direct sales.	Wildrunner's use Facebook, Instagram, Twitter.[88] Tour de Tuli's online promotion and booking system.
Word-of-mouth	Participants in cross-border products share experiences with friends and family.	Tour de Tuli.

As an example of how press releases can be used, Wildrunner uses a dedicated emailer to distribute messages to 21,000 digital magazine subscribers to the largest trail running magazine in the USA. This cost USD3,480 (R42,000) with an estimated advertising value of R2.2 million. Wildrunner suggest that this activity generates a rush of interest from both public and niche outbound running tour companies looking to resell this to their respective markets, and some of these can be converted into sales.[89]
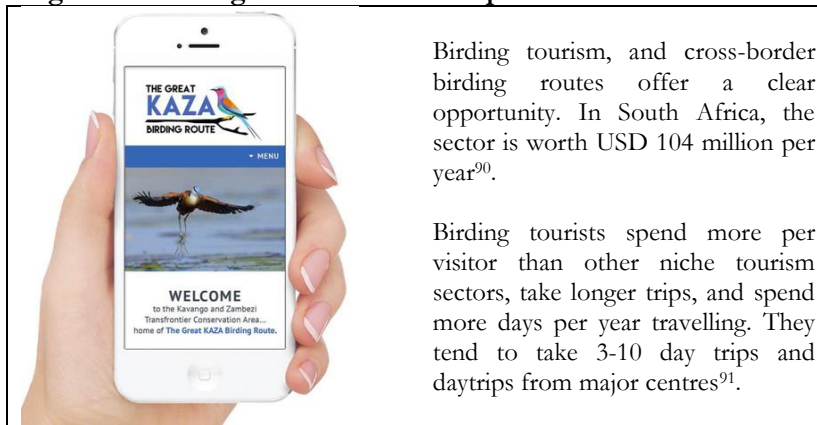
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[86] Pers. Com. O. Middleton, Wildrunner, Email February 2018
[87] Barmen, G. (2017) Desert knights 5-year operational report, Submitted to ARTP Joint Management Board, 18 October 2017
[88] http://www.wildrun.com/event/Richtersveld
[89] Pers. Com. O. Middleton, Wildrunner, Email February 2018

Figure 17: Birding route markets and promotion

Birding tourism, and cross-border birding routes offer a clear opportunity. In South Africa, the sector is worth USD 104 million per year[90].

Birding tourists spend more per visitor than other niche tourism sectors, take longer trips, and spend more days per year travelling. They tend to take 3-10 day trips and daytrips from major centres[91].

9.3   RECOMMENDATIONS

Recommendations for marketing and promotion:

- **Improve destination promotion** for TFCAs in SADC to raise awareness among travellers and tour operators, through a variety of channels including website, social media, newsletters etc.
- Establish a **common marketing strategy** for TFCAs to promote nature-based tourism.
- Provide **capacity building for marketing** and promoting nature-based tourism in TFCAs.
- Promote **collaborative marketing and promotion** by TFCA cross-border tourism products by pooling client databases.

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[90] Department of Trade and Industry, South Africa (2009) Cited by Taylor, M. (2018) Opportunities for birding tourism development in TFCAs, Birdlife South Africa, Presentation given at the SADC/GIZ Expert workshop on development of a guideline on cross-border tourism products in SADC TFCAs, Southern Sun Hotel, OR Tambo Airport, 30-31 January 2018

[91] Taylor, M. (2018) Opportunities for birding tourism development in TFCAs, Birdlife South Africa, Presentation given at the SADC/GIZ Expert workshop on development of a guideline on cross-border tourism products in SADC TFCAs, Southern Sun Hotel, OR Tambo Airport, 30-31 January 2018

10   SUSTAINABILITY

10.1   CURRENT INTEGRATION OF SUSTAINABILITY

Cross-border tourism product owners and developers were asked how they integrated sustainability activities. Of those that responded, the majority indicated that they had integrated sustainability and development impact into their product design, and half had evaluated their development impacts and sustainability. A majority thought they should have developed indicators of progress and success, and also policies for local employment, and local procurement (see Figure 18 below). Some stakeholders reported that sustainability was not an explicit, formal process. For example, Desert Knights does not have a written policy on local employment and procurement, but it mentions local benefits. Assessing development impacts of cross-border tourism products is not consistent, as there are no standard monitoring and evaluation frameworks in place.   These impacts also need to be better communicated with clients and beneficiaries.

Figure 18: Sustainability activities by cross-border tourism products in SADC (n=8)
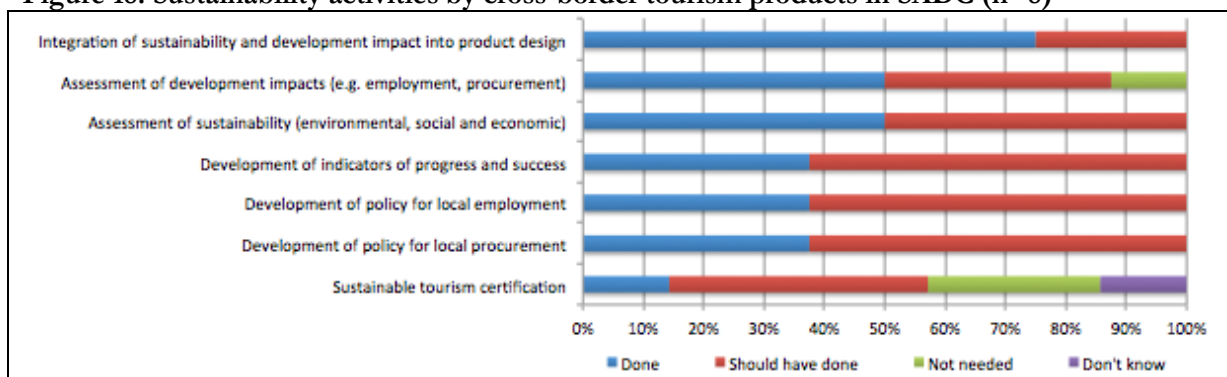
10.1.1   ENVIRONMENT

In TFCAs, nature conservation needs to be the priority. Cross-border tourism needs to be designed, developed and operated in such a way that it does not undermine the conservation objectives of a TFCA, and that it is compatible with an overarching management plan.

SANParks in South Africa, and Ministry of Environment and Tourism in Namibia, undertake environmental scoping assessments for cross-border tourism products, and produce Environmental Management Plans (EMP). SANParks EMPs describe the nature of the impacts and mitigation measures relating to environment and vegetation and also issues relating to safety and security of participants.[92]

10.1.2   SOCIAL AND CULTURAL

The consultation survey revealed that integrating communities was the most frequently cited motivating factor for establishing cross-border tourism products in TFCAs. Therefore, integrating community elements in to the design and operation of a product is crucial. Options include:

- **Cultural experiences:** The Pafuri Trail and Shangaan festival event in the GLTFCA integrate a Zimbabwean cultural festival as the key feature of the cross-border tourism product.
- **Community-based accommodation** provides facilities for tourists during their trips, such as the proposed Grand traverse in the Maloti Drakensberg TFCA, which proposes to include the TFPD-operated Witsieshoek Lodge on the Lesotho/South African border.

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[92] Whittington, B., Shetukana, R., and Bezuidenhout, H. (2017) Recreational mountain bkiking – Desert Knights Mountain Bik Tour: Environmental Management Plan, /Ai/Ais-Richtersveld Transfrontier Park, November 2017, South African National Parks

- **Employment and entrepreneurial opportunities** are available to community members, particularly during annual and bi-annual events (see section 6.3).
- **Participation** in cross-border events has been promoted by some events, such as the Tour de Tuli and Desert Knights which include cyclists from local communities, and they become ambassadors for the events. The KAZA Golf Classic makes a proactive effort to include school children from Victoria Falls and Livingstone among the participants, who are not charged to join the event.
- **Consultation** with community members/stakeholders as part of the planning process. For example, the Tour de Tuli's opening ceremony includes children that have participated in CITW programs.

Figure 19: Community linkages with cross-border tourism products: school children benefiting from Tour de Tuli; local catering staff on the Mapungubwe Wildrun, and the Shangaan cultural festival in Zimbabwe[93]
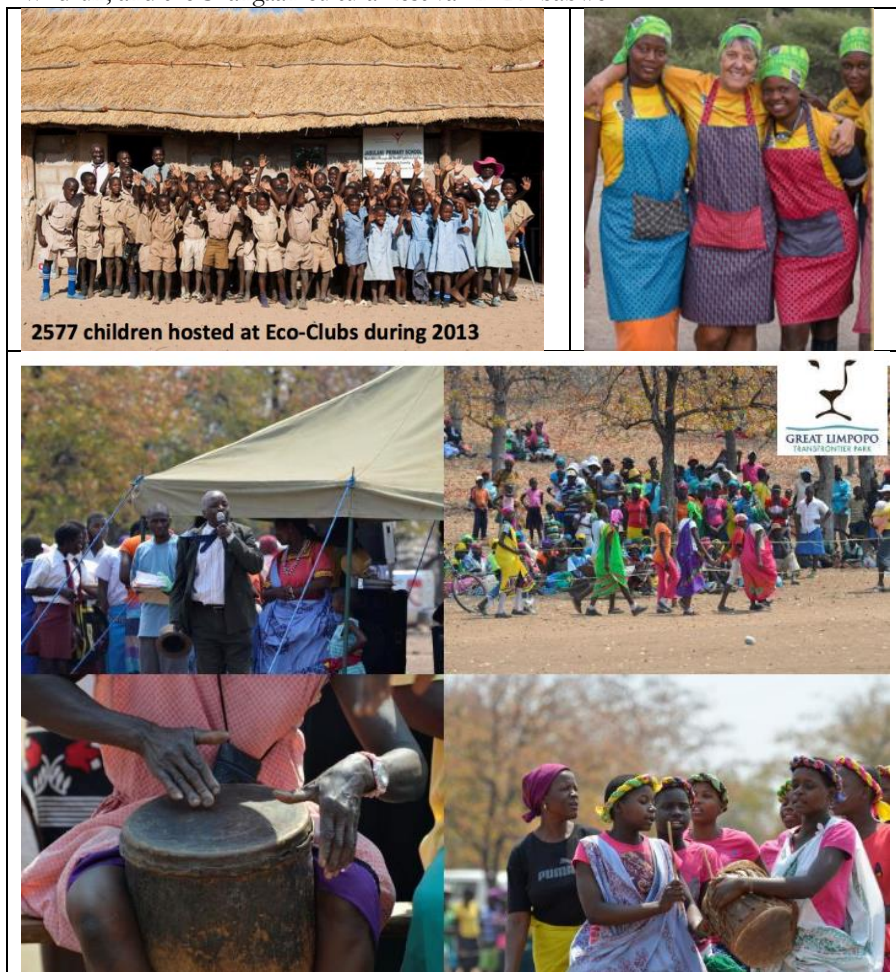
Some of the challenges faced include dealing with unrealistic expectations of community members (i.e. jobs and benefits perceived as 'rights'). There are misunderstandings on the links between profit, revenue and expenditure. For example, if community members see lots of tourists, and promotion, they assume that there are huge profits. Furthermore, disputes between communities and authorities impact on cross-border tourism products caught in the middle. Unrealistic expectations can be avoided through careful planning, awareness raising and facilitation of discussion, to avoid these problems. Operators need to understand the importance of doing business in a 'fair' manner, and appreciate how to consult with community structures.[94]

[93] Snyman, S. (2014) op. cit; Middleton, O. (2018) op. cit; Theron, P. (2014) Pafuri Walking Trail: Shangane Cultural Festival, Presentation at the Conference on Guidelines on concessioning and sustainable tourism investment in TFCAs in SADC, Garden Court OR Tambo, South Africa, 2-3 September 2014

[94] O'Leary, G. (2014) Operating in the TFCAs: The voice of experience, Presentation at the Conference on Guidelines on concessioning and sustainable tourism investment in TFCAs in SADC, Garden Court OR Tambo, South Africa, 2-3 September 2014

10.1.3 ECONOMIC

Financial and economic issues relating to sustainable tourism include the impacts on local communities and economies, through employment, expenditure on products, and use of services. Discussion of benefit sharing options is provided in section 6.3, and of the expenditure on local services and employment in section 7.2.

11 DEVELOPMENT PROCESS

11.1 STEP-BY STEP PROCESS

The processes used to establish cross-border tourism products have differed between and within TFCAs. As there is no formalized process in place for product development yet, different developers have had different entry points, and have varied their approaches. In this section, information is provided on the development approach used by existing cross-border tourism products. The Guideline synthesizes this information to develop a practical but idealized version, to indicate what a successful development process would incorporate.

Cross-border tourism product owners and developers were asked activities they undertook during the scoping, design, feasibility and development of their products. Notably, the most frequently reported activities were forming linkages with tour operators and/or travel agents, reviewing product options, and detailed product design (see figure below). The issues that should have been done included reviews of capital investment and operational financing options, detailed assessments of commercial viability and market demand, and identification of customer profiles and source markets.

Figure 20: Scoping, design, feasibility and development activities for cross-border tourism products (n=12)
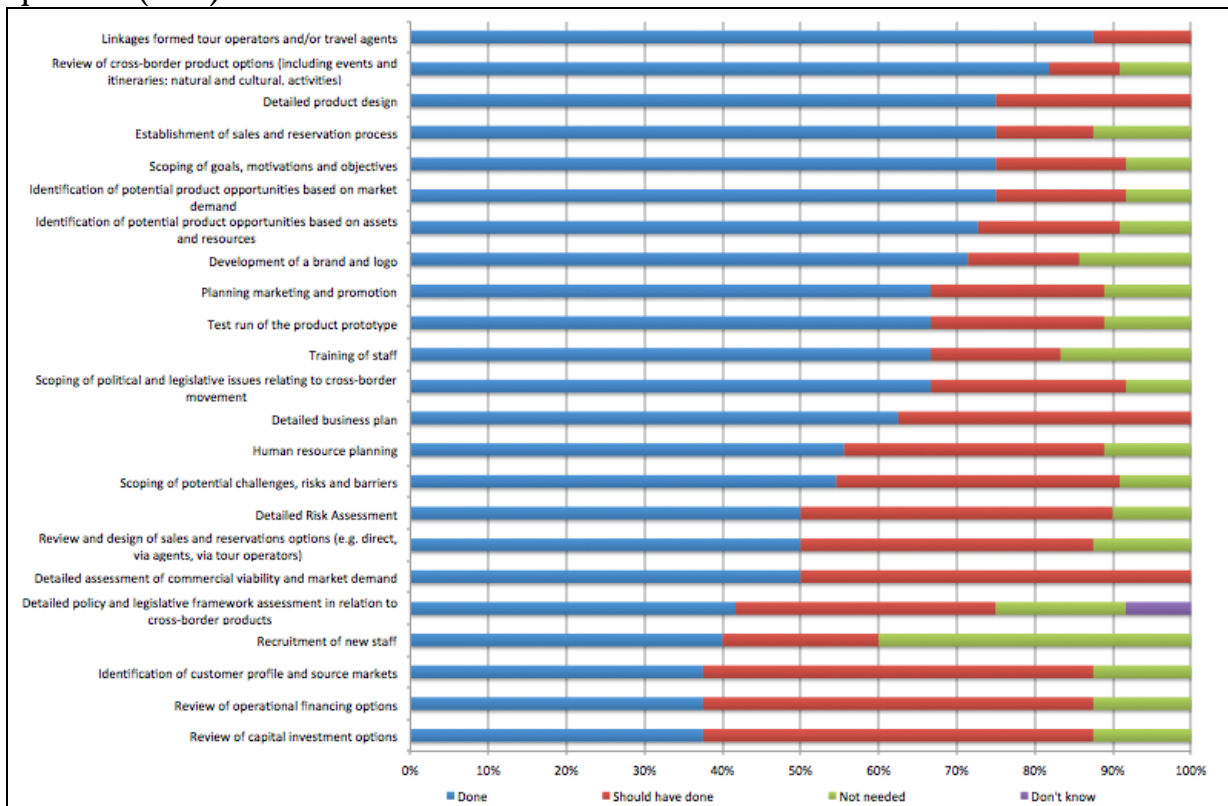
Examples of the planning processes for two annual events are provided below, to illustrate the step-by-step process applied by each. It understood that the Maloti-Drakensberg Wildrun did not proceed, as it was proposed to be located in a wilderness area of the TFCA. Products need to be planned in alignment with protected area management plan zonation. Alternatively, protected area authorities need to agree to exception, and plan appropriate mitigation.

Table 11: Process of developing cross-border tourism products

Step	Tour de Tuli[95]	Maloti-Drakensberg Wildrun[96]
Scoping	Identify camp sites: Planning meeting with core team to determine the basic outline (number of nights in each country, use of new or previously-used site)	Present proposal to the Maloti-Drakensberg Transfrontier Park Joint Management Board (MDTP JMB) for consideration and support [SEP]
Design and feasibility	Liaise with landowners for their advice and gain informal permission. Propose new sites to landowners, and scouts establish if they are suitable for 500 people. Plan the flow of the camp site and location of various components (e.g. tents, truck access, shade and water supply)	Engage with Sehlabathebe Lodge and Thamathu Village Homestay to discuss requirements & expectations around catering, and agree prices. MDTP JMB & Boundless Southern Africa to explore what resource could be available to support the initial setup. [SEP]
Development	Route team members go to each country and plan the route. Plans include food stops, strategic vehicle positioning (i.e. high risk areas in terms of technical riding and high animal concentration) and medical positioning. Route testing to ensure the cycle route works is the best riding opportunity	Secure cross-border traverse permissions and control measures (Boundless Southern Africa) Secure written permissions from the South African private farm owners on the day one (Wildrun Africa). Reconnaissance trip to check requirements and standards (Wildrun Africa). [SEP] Finalise costings around hiring a portion of the campsite at Silver Streams to host the finish as well as secure parking for runner's cars during the event (Wildrun Africa). Trial run: Wildrun Africa to invite runners to the recce trial run in October 2015, along with a photographer & select running media. MDTP JMB & Boundless Southern Africa to invite relevant partners and colleagues to experience the recce first hand.

For events, scoping tours are invaluable tools to test routes, consider risks and challenges, and test alternative routes and campsites, in order to create a good experience. They can also help to develop ownership by local stakeholders who are involved form the start, including protected area management committees.

A feasibility assessment was undertaken for the Shingwedzi Cliffs Adventure Trail.[97] The assessment reviewed and compared different camp location options, service and guest access routes and times, market (i.e. trends for wilderness trails, specific target markets), product rationale, attractions, competitive advantage, marketing and sales channels, activities, pricing, design and layout, services, furnishings, staff, costs, legal arrangements, and a financial analysis. This example could be adapted and used as a template for feasibility assessments for future products, with supplementary sections on community involvement and benefits, and environmental assessment.

[95] Pers. Com. N. Harris, email, 6 February 2018
[96] Wildrunner (2014) Initiating proposal, Maloti-Drakensberg Wildrun 2016
[97] Massyn, P. J. (2014) Shingwedzi Cliffs Adventure Trail, Feasibility Assessment, Version3, Sept 2014, Report to the Parque Nacional do Limpopo, Great Limpopo TFCA.

In terms of their operational activities, most respondents reported a comprehensive suite of activities undertaken (see Figure 21 below). Interestingly though, here was a relatively equal split of responses relating to market research, with those who had done it (30%), who did not need it (30%), and who thought it should have been done (40%) (see Figure 21 below). One stakeholder indicated that because TFCA cross-border tourism products are unusual and not widely understood, it is more difficult to establish market demand in a usual way.

Figure 21: Operational activities for cross-border tourism products (n=10)
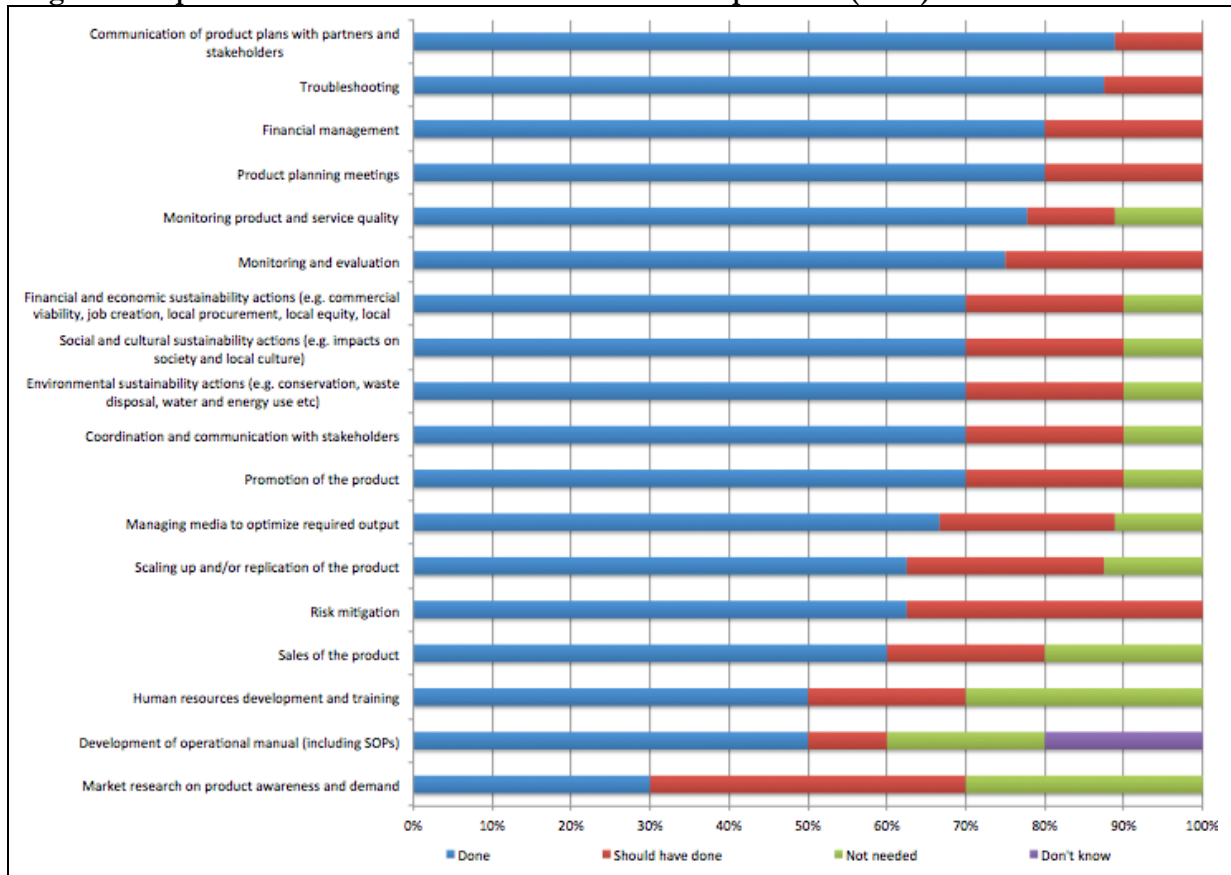
11.2   RECOMMENDATIONS

- **Develop templates for feasibility studies for the Guideline,** adapted from the Shingwedzi Cliffs example.
- **Provide concession or license periods** for cross-border tourism product development and operation, using the SADC TFCA concession guidelines as a process:

    o   For **new cross-border tourism products**, design a tender process offering different types of product opportunities to the market, and invite proposals. Use confidential meetings with project proponents to explore and discuss project concepts, in order to protect intellectual property, and vet the concept with pre-established criteria.
    o   For **existing cross-border tourism products**, establish a multi-year permit option, whereby they can repeat the event over time, without applying for all permissions every year. Given their intellectual property in the product, incorporate a negotiation process and agreement, that allows operators to retain their proprietorial information, rather than taking the concept to open tender. Application would be approved by the TFCA-Joint Management Board – Council of Ministers for (say) 5 years.

12 DISCUSSION

12.1 LESSONS LEARNED

Lessons learned within this analysis include a series of successes and challenges related to the establishment and operation of cross-border tourism products. As part of the surveys, stakeholders were asked about specific successes and challenge relating to different elements of the development process. Their responses are presented in Table 12 below. (Note that most of the issues raised here are in line with points made earlier in the report.)

Table 12: Strengths and weaknesses of cross-border tourism products

Issue	Strengths (successes)	Weaknesses (challenges)
Political and legal issues	Smooth border crossing. Ministries clarifying their own legal expectation for success of the product. Bringing immigration, customs and police officials on cross-border events as participants, to improve understanding and buy-in.	Variable commitment by different countries. Harmonization of policies / Incompatible legislation between countries. Border crossing difficulties (e.g. poor infrastructure, lack of corresponding facilities across-borders, visas and associated costs) Access Infrastructure (e.g. poor roads impact on travel time and vehicle maintenance costs) Communications Accommodating different rules and regulation in different countries. Timeous permissions for borders (designated and designated) Inability to transport meat across veterinary red lines
Governance and institutional arrangements	Outsourcing and affirmative procurement with emerging and local entrepreneurs. Coordination of multiple countries. Increased awareness. Improved conflict resolution. Assigning ministries with responsibilities according to terms of reference	Product insecurity, due to the lack of a contract to develop and operate the cross-border tourism product Poor communication and collaboration at local level in remote areas. Weak coordination of partners and stakeholders. Weaknesses in decentralization and delegation among some TFCA managers.
Risk assessment	Liability insurance	Firearms not being allowed to cross-borders Cyclist injuries (including heat exhaustion and dehydration) Emergency access for patient extraction cross-border. Wildlife Vehicle crossings on rivers Support crews getting lost or stuck due to 4x4 terrain Lack of attention to liability insurance in relation to food health and safety
Stakeholder identification and engagement	Communities from different nations collaborating. Use of a process framework. Interest of stakeholders to be involved.	TFCA coordinator seemingly powerless to coordinate decisions and engage solution. No good direct communication with immigration officers who might need facilities to provide support (e.g. transport, accommodation). Managing expectations of benefits of partners and beneficiaries. Ensuring beneficiaries receive planned benefits. Cross-border movement of community members.

Issue	Strengths (successes)	Weaknesses (challenges)
		Time required to meet with officials and community members (e.g. travel time, meeting similar structures in the same community). Including some important stakeholders late in the process.
Business planning and design	Supportive partners with financial and human resources. Operational manuals. Templates for camp establishment. Feedback discussion with team. Development of long-term partnerships with NGOs. Sensitization of the tourism sector. Including media, local stakeholders, and tour operators in pilots to raise awareness, profile and buy-in.	Not knowing whether the event would be given permission or not Inadequate financial reporting system – needed from the start Lack of documentation and basic documents for operation Ad hoc approach, with lack of understanding of costs and who is responsible for these, what to charge participants, likely profits, how profits are allocated.
Sustainability	Maximizing local procurement. Capacity of local communities strengthened. Increased participation of local communities and private sector. Improved human wildlife conflict resolution. Improved conservation and habitat restoration. Environmental, social and economic impact assessments. Control of invasive alien species	Need to communicated better with beneficiaries and clients on sustainability Increase in habitat quality – restoration and regeneration. Training community coaches and provision of materials.
Raising finance	Good support from those approached for financial support. Online funding campaigns. Using willingness-to-pay studies among tourists.	Challenging because of product uncertainty Difficult to raise corporate sponsorship with small events / small numbers of participants. Upgrading protected area facilities to ensure value for money of products.
Operations	Repeat use of the same local community personnel. Happy clients.	Need to upgrade community camps (e.g. Maramani) Need to improve international promotion of product through niche channels. Improvements needed for financial management and risk mitigation Training for service providers (e.g. caterers)

In terms of time taken to establish a cross-border tourism product, one developer indicated it had taken 4 years to develop a product before it could be launched. The transaction costs (particularly for private sector), can be excessive.

12.2 OPPORTUNITIES FOR ADDITIONAL AND SCALED UP PRODUCTS

Stimulating the development of new tourism products in TFCAs should be used to increase opportunities in remote areas, and focus on collaboration between countries rather than increasing competition.

Ideas for new and scaled up cross-border tourism products include the following:

- Walking trails and hiking (e.g. Greater Mapungubwe TFCA; Chimanimani TFCA; Maloti-Drakensberg TFCA)
- Trail runs/adventure trails (e.g. Lubombo TFCA)
- Bush-beach combination from Maputo to Kosi Bay (with the new bridge from Maputo to Catembe) (Lubombo TFCA)
- Mountain biking

- Canoeing (e.g. Lubombo TFCA)
- Horseback riding (e.g. Malawi-Zambia TFCA)
- Sports events (e.g. Great Limpopo TP Pafuri Football Championship)
- 4x4 trails (e.g. Iona-Skeleton Coast TFCA; Great Limpopo TP; Lebombo TFCA)
- Sea turtle breeding viewing (e.g. Lubombo TFCA)
- Archaeology, paleontology and rock art (Greater Mapungubwe TFCA)
- Combinations of activities within TFCAs, including canoeing, walking, mountain biking birding, wildlife and community visits.

Many of the tour operators surveyed indicated that they would be interested to include TFCAs in their tours in the future. The most popular destinations for the future were KAZA (46%), Kgalagadi (43%), /Ai /Ais-Richtersveld (39%), Great Limpopo (32%) and Lower Zambezi-Mana Pools (29%) (n=28). While 56% of operators were interested in establishing cross-border tours using formal border crossings, and with regular departures, 48% were also interested in offering annual or bi-annual events (n=25). The types of experiences operators wished to offer in the future were similar to those currently offered (i.e. safari (93%), wildlife (85%), 4x4, adventure, community, culture and hiking (each 59%), birding 56%), n=27).

The process for developing these products, and the drivers of the concepts, should be regarded in line with recommendations in this report, and also the associated SADC TFCA Tourism Concession Guidelines.

12.3   NEEDS FOR SPECIFIC TOOLS AND GUIDELINE CONTENT

Specific guidance tools that stakeholders requested to include in the guideline, which could be practically included, were:

- Text that is concise, user-friendly and easy to adopt, with little jargon.
- Processes for obtaining permissions from government authorities.
- Guidance on border crossings and regulations
- Information on funding accessible to integrate community partners, or training community staff for cross-border tourism products.
- Guidance on contractual arrangements for different activities or services (e.g. public-private-partnerships, partnership MoUs or permits) including their time periods.
- Processes and options for community benefits, including guidance for best practices in community beneficiation; identification of beneficiaries; how community members can develop/share/fund ideas; gender and youth; and managing expectations.
- Information on sustainability, including environmental outcomes of cross-border tourism products.
- Checklists and minimum standards.

Additional information and support required outside the scope of the guidelines that was requested included:

- Lists of local suppliers in each country that could be approached to purchase event supplies. This would need to be established by TFCA coordinators.
- Support with marketing and promotion. This would need to be arranged with TFCA coordinators and Boundless Southern Africa.

12.4   OPTIONS FOR DISSEMINATION AND TRAINING

Stakeholders suggested that the guideline be disseminated electronically (e.g. email, internet, intranet) to:

- All relevant TFCA practitioners and stakeholders.
- Protected area managers and their agencies, including TFCA managers.
- RETOSA board members.

- Tourism agencies, including national tourism boards.
- Tourism and business associations.
- Lodges and tour operators working in TFCAs.
- NGOs working with communities in TFCAs.
- Communities and community projects and organizations.
- Border posts and immigration officials.
- Visitor centers and tourism information offices.
- Social media and internet-based platforms (e.g. SADC website).

In terms of training, while some stakeholders did not think this was necessary, others thought that focussed training on specific parts of the guideline could be useful to standardise service quality. For example, aspects relevant for police and immigration officials relating to border arrangements, would not be the same as for community members more focussed on employment and business opportunities.

13   ANNEXES

13.1   ANNEX 1: CONSULTEES

Consultation workshop participants, interviewees, recipients of Detailed, Strategic, and Tour Operator questionnaires, and validation workshop participants.

13.2   ANNEX 2: TERMS OF REFERENCE

2a   Original
2b   Amendment

13.3   ANNEX 3: QUESTIONNAIRES

3a   Detailed
3b   Strategic
3c   Tour operator

13.4   ANNEX 4: WORKSHOP AGENDA

13.5   ANNEX 5: WORKSHOP PRESENTATIONS

5a   Workshop on cross-border tourism products in SADC TFCAs, SADC Secretariat
5b   Guidelines and situational analysis on cross-border tourism products in SADC TFCAs, Dr Anna Spenceley
5c   Developing sustainable cross-border tourism products in our TFCAs, Roland Vorwerk
5d   Naturreisen Wigwam expeditionen, Ulrich Klose
5e   Tour de Wilderness, Nicola Harris
5f   Community in cross-border products, Beatrice Madau
5g   Elemental outdoor – explore-discover-experience. Wildrunner.co.za, Owen Middleton
5h   Desert Kayak Trails, Brent Whittington
5i   Opportunities in birding tourism development in TFCAs, Martin Taylor
5j   Integrating sustainability, Dr Sue Snyman
5k   Guidelines and situational analysis on cross-border tourism products in SADC TFCAs – validation meeting, Dr Anna Spenceley
5l   Guideline for cross-border tourism products I SADC TFCAs – validation meeting, – Dr Anna Spenceley

13.6   ANNEX 6: INVENTORY OF CROSS-BORDER PRODUCTS

Existing and planned products.

13.7   ANNEX 7: MAPS OF CROSS-BORDER PRODUCTS

13.8   ANNEX 8: VISA REQUIREMENTS IN SADC

13.9   ANNEX 9: FINANCIAL ANALYSIS OF EVENT AND TOUR