

# **Tourism investment in the Great Limpopo Transfrontier Conservation Area**

## **Scoping report**

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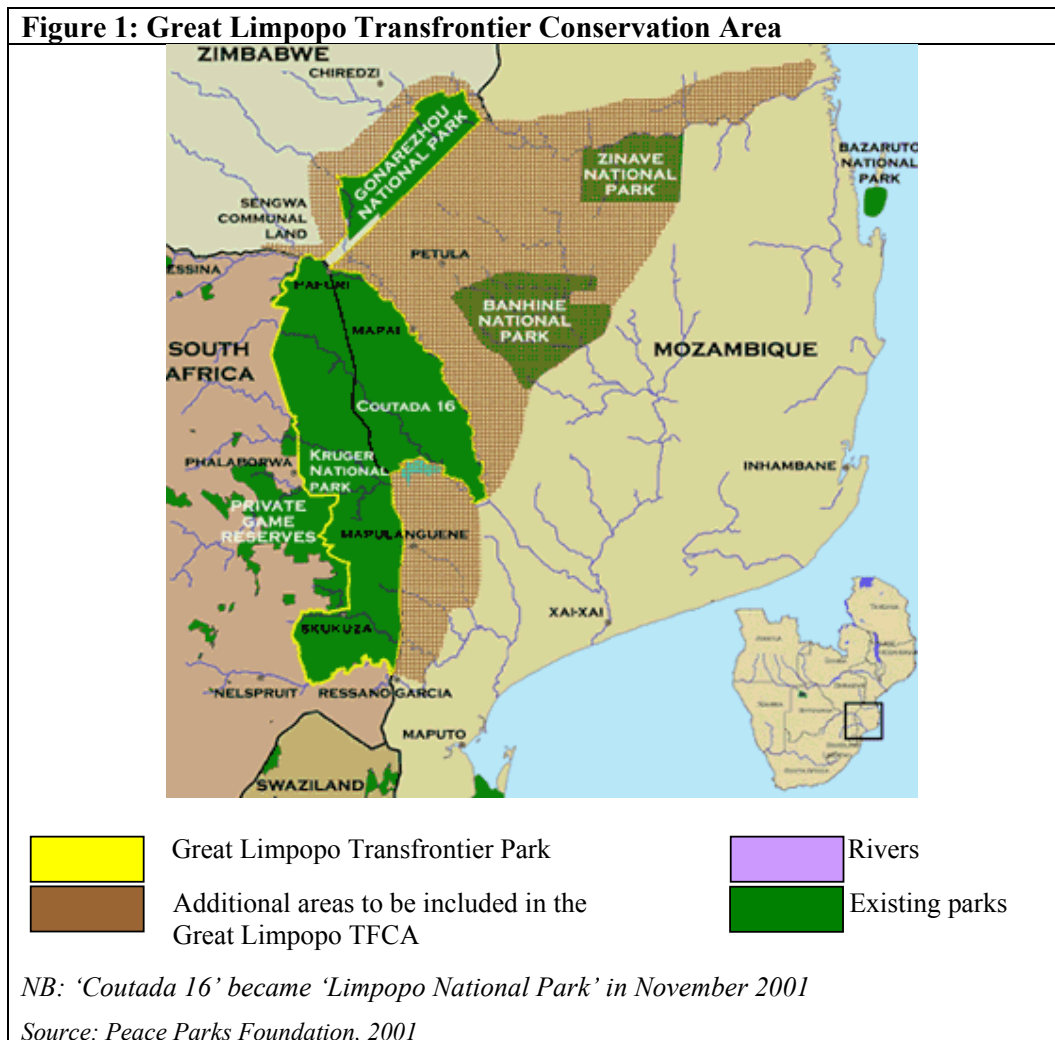
AHEAD	Animal Health for the Environment and Development
AWF	African Wildlife Foundation
CAMPFIRE	Communal Areas Management Programme for Indigenous Resources
CBNRM	Community Based Natural Resource Management
CPA	Makuleke Common Property Association
CPI	Centro de Promoção de Investiments
DEAT	Department of Environmental Affairs and Tourism
DNFFB	Ministry of Agriculture and Rural Development
DNPWLM	Department of National Parks and Wild Life Management
DTI	Department of Trade and Industry
EIA	Environmental Impact Assessment
GDP	Gross Domestic Product
GEF	Global Environment Facility
GLTFCA	Great Limpopo Transfrontier Conservation Area
GLTP	Great Limpopo Transfrontier Park
GNP	Gonarezhou National Park
GOM	Government Of Mozambique
HDI	Historically Disadvantaged Individuals
IFC	International Finance Corporation
JMB	Joint Management Board
JMP	Joint Management Plan
KfW	German Kreditanstalt für Wiederaufbau
KNP	Kruger National Park
LNP	Limpopo National Park
MADER	Ministry for Environmental Affairs
MITUR	Ministry of Tourism
NGO	Non-Governmental Organisation
NP	National Park
PADs	Park Authority Developments
PATI	Priority Areas for Tourism Investment
PDI	Previously Disadvantaged Individuals
PIPAs	Provincial Investment Promotion Agencies
PIU	Project Implementation Unit
PPF	Peace Parks Foundation
RAP	Resettlement Action Plan
RDC	Rural District Council
RWG	Resettlement Working Group
SADC	Southern African Development Community
SANParks	South African National Parks
SCL	Sengwe Communal Land
SDI	Spatial Development Initiatives
SEATIP	South East African Tourism Investment Program
SMMEs	Small, medium and micro-enterprises
TFCA	Transfrontier Conservation Areas
TFCAPISP	Transfrontier Conservation Areas Pilot and Institutional Strengthening project
TMC	Trilateral Ministerial Committee
TPARI	Transboundary Protected Area Research Initiative
WWF	World Wide Fund for Nature
ZTA	Zimbabwe Tourism Authority

# 1. INTRODUCTION

Transfrontier Conservation Areas (TFCAs) are described as relatively large areas encompassing one or more protected areas, which straddle frontiers between one or more countries (World Bank, 1996). In comparison to national parks, TFCAs have the potential to conserve a greater diversity of species within larger geographical areas and to promote co-operative wildlife management between nations (BSP, 1999). TFCAs may also improve opportunities for tourism, by allowing visitors to disperse over greater areas and obtain better quality experiences (Singh, 1999), and by offering more diverse attractions (van der Linde *et al*, 2001). The World Wide Fund for Nature (WWF) suggests that TFCAs have the capacity to strategically develop sustainable tourism that may support the costs of conservation management, while also providing employment and entrepreneurial opportunities for poor people in developing countries (BSP, 1999).

The 99 800 km<sup>2</sup> Gaza-Kruger-Gonarezhou Transfrontier Conservation Area was formally established in November 2000, when an agreement was signed by the governments of Zimbabwe, South Africa and Mozambique (see Figure 1). In 2001 a smaller area containing the ‘core protected areas’ of Kruger National Park in South Africa, Gonarezhou National Park in Zimbabwe, and Limpopo National Park in Mozambique was recognized as Great Limpopo Transfrontier Park (GLTP) (Wolmer, 2003). A formal treaty for this 35 000 km<sup>2</sup> transboundary area was signed in November 2002 (Huggins *et al*, 2003) as a first phase towards the wider, and re-branded, Great Limpopo TFCA.

**Figure 1: Great Limpopo Transfrontier Conservation Area**



The TFCA has generated interest amongst conservationists because of its potential to become one of the largest conservation areas in the world (Hanks, 1998a). The area could conserve the widest variety of wildlife on earth, with areas of great cultural and historical value: making it an area of global conservation significance (Gelderblom *et al*, 1998). However, from the initial planning stages, it was clear that there were disparities between the three countries' policies and law enforcement, access to finance, approaches to natural resource management, threats to biodiversity, relationships with neighbouring communities, and levels of tourism infrastructure (Afrosearch, 1999; Gelderblom *et al*, 1998).

Global tourism shrunk from over 714 million international tourist arrivals in 2002 to 694 million international tourist arrivals in 2003 (down 2.8%). The reasons for the decline cited by most commentators were war, terrorism, SARS and a soft global economy (South African Tourism, 2004). However, one of the motivations for the GLTFCA is the potential to derive revenue through tourism, and in particular, nature-based tourism. During 2000, nature-based tourism was estimated to generate an aggregate of \$3.6 bn from Africans and non-Africans, and contributed 9% of total Gross Domestic Product (GDP) for the Southern African Development Community (SADC) region in 1999. The nature-based tourism sector was responsible for an estimated 2.8 m non-African arrivals and 6.1 m African arrivals (Scholes and Biggs, 2004) (see Table 1).

	<b>South Africa</b>	<b>Zimbabwe</b>	<b>Mozambique</b>
Nature tourism arrivals ('000s)*	4 634.5	1 494.4	42.0
Total tourism arrivals ('000s)***	5 872.3	1 966.6	
<i>Indicative % nature arrivals<sup>1</sup></i>	<i>78.9%</i>	<i>76.0%</i>	
Nature tourism income (US\$ m)*	2 298.8	143.5	8.4
Tourism income (US\$ m)**	4 561.7	184.1	-
<i>Indicative % income from nature tourism<sup>1</sup></i>	<i>50.3%</i>	<i>77.9%</i>	-
Travel and tourism industry GDP (US\$ m)**	3 563.9	158.8	-
* Scholes and Biggs, 2004. Data for 2000 for African, non-African and domestic tourists			
** WTTC, 2003. Data for 2003, but not available for Mozambique			
*** South Africa data: SA Tourism 2004, Zimbabwe data: ZTA, 2001. Data for 2000			

This scoping study aimed to determine the level of tourism investment that had taken place within the GLTFCA since it was formally established in 2000. The implications of tourism development in the area for sustainable development<sup>2</sup> were also appraised, with respect to their economic, social and environmental implications. The study also sought to identify driving forces catalysing tourism investment and also constraining factors impeding sustainable tourism. Butler (1993:29) defines 'sustainable development in the context of tourism' as:

*“ . . . tourism which is developed and maintained in an area (community environment) in such a manner and at such a scale that it remains viable over an indefinite period and does not degrade or alter the environment (human and physical) in which it exists to such a degree that it prohibits the successful development and wellbeing of other activities and processes”.*

During the study it became apparent that there had actually been very little tourism development in the Mozambican or Zimbabwean regions of the TFCA between 2000 and 2004, by comparison to

<sup>1</sup> The proportion is indicative only, as the figures compared are for different years, and figures were drawn from different techniques: border entry counts, estimates and satellite accounts.

<sup>2</sup> Sustainable development is largely understood to be development that “ . . . meets the needs of the present generation without compromising the ability of future generations to meet their own needs” (WCED, 1987: 43). In 2002 the World Summit on Sustainable Development (Rio+10) broadened and strengthened the understanding of sustainable development particularly with regard to important linkages between poverty, the environment, and use of natural resources (UN/DESA, 2002).

South Africa. In fact, a study of tourism investment in the GLTFCA was seen by some stakeholders to be premature: since efforts were predominately concentrating on tourism planning in Mozambique, and political constraints in Zimbabwe were impeding any major tourism investment. Consequently this scoping report also reflects the different stages of tourism planning and development that the three participating countries are currently at.

## **2. APPROACH**

This scoping report was developed predominately using existing literature sourced from journal articles and consultancy reports sourced from various databases and libraries (i.e. Athens, University of the Witwatersrand, Transboundary Protected Areas Research Initiative (TPARI), Peace Parks Foundation) and a search for relevant documents over the internet. To complement this literature, interviews with key stakeholders were undertaken in Johannesburg, Maputo and Durban between October and December 2004, and direct correspondence by email was used to communicate with other individuals and institutions in Zimbabwe and worldwide. A list of these stakeholders can be found in Appendix 1.

The study was partially complicated by the fact that a definitive spatial map for the TFCA has not yet been agreed. Therefore, the boundaries indicated in a map from the Peace Parks Foundation in 2001 (Figure 1) were used during this study.

Tourism investment in the GLTFCA since 2000, implications for sustainable development, and drivers and constraints are detailed below in relation to the country where they have taken place (i.e. South Africa, Zimbabwe or Mozambique) or with respect to the TFCA where overarching factors are considered.

## **3. TOURISM INVESTMENT**

Within the context of the GLTFCA, tourism investment is described for South Africa, Zimbabwe and Mozambique separately. A database of investments identified can be found in Appendix 2.

### **3.1 South Africa**

In 2003 foreign arrivals to South Africa grew by 1.2% and foreign direct spend reached R53.9 bn (up 10.5% from 2002). The average length of stay in 2003 was 10 nights, unchanged from 2002 despite the trend of global trends of tourists taking shorter trips and brings South Africa in line with the global average. There were an estimated 512,000 direct jobs in 2003 as a result of tourism, and the industry contributed more than a R100 billion of foreign direct spend to the economy. Over 49 million domestic trips were undertaken in 2003 by at least half of the South African population over 18 years. Approximately 64% (32 million) of all domestic trips were trips to visit friends and family, whilst 16% (8.1 million) trips were for the purposes of holiday (South African Tourism, 2004).

In South Africa, the GLTFCA currently consists of Kruger National Park (KNP) (see Figure 1). There are discussions regarding the potential to also include the private nature reserves on the western boundary of KNP such as the Sabi Sands, Klaserie, and Timbavati, in addition to provincial reserves such as, Manyeleti and Letaba Ranch. It may also be possible to link KNP to the Blyde Canyon Nature Reserve to promote the Kruger to Canyon biosphere reserve. This discussion will concentrate on tourism in the areas currently included on maps of the TFCA.

The Department of Trade and Industry (DTI) reports that there is a lack of accurate tourism product records within the GLTFCA (Pers. com. K. Rivett-Carnac, 2004).

### 3.1.1 Kruger National Park and the commercialisation process

KNP has well developed tourism infrastructure, with 25 rest camps of various sizes providing 4,056 beds, in addition to 405 caravan and camping sites (UNEP/WCMC, 2004). Although the overall standard of accommodation is not considered high by international standards, accommodation ranges from luxury tented camps to self catering guesthouses and cottages (KPMG, 2002). These are complemented by the more "upmarket" accommodation provided in several private conservation areas adjoining the park (UNEP/WCMC, 2004). KNP has approximately 1 million visitors per year and generates an annual income of around US\$40 m (JMB, 2002).

KNP is easily access by road from Gauteng (five hours drive via the N4) and Maputo (two hours drive) and a series of tar, gravel and sand roads in the park cover 2900 km. Flights from international airports, such as Johannesburg, connect to Eastgate (Hoedspruit), Phalaborwa and Mala Mala. The new R350 m Kruger Mpumalana International Airport has a 3.1 km runway with the capacity to land Boeing 737, 747, 767 and the Airbus series ([www.sareservations.com/kmia.htm](http://www.sareservations.com/kmia.htm), undated). KNP also has 2000 m tarmac strips at Punda Maria and Skukuza, in addition to four smaller gravel strips used for management. The park is well serviced with national grid power (JMB, 2002).

Until 2000, all tourism infrastructure inside KNP was developed, owned and operated by South African National Parks (SANParks). At this time SANParks embarked on a commercialisation process that allowed the parastatal to grant concessionaires rights for the use of defined areas of land and infrastructure within National Parks, coupled with the opportunity to build and operate tourism facilities over specific time periods (SANParks, 2001). The aim of the process has been to increase the net revenue that commercial activities contribute to SANPark's core function of nature conservation. The program led to the transfer of management of tourism operations to commercial operators, who were considered to be more qualified and equipped to such facilities than SANParks (van Jaarsveld, 2004). Major objectives include the promotion of economic empowerment of the formerly disadvantaged, the promotion and provision of business opportunities to emerging entrepreneurs (in particular local communities adjacent to national parks) and the application of SANPark's environmental regulations and global parameters to all concessions (SANParks, 2000).

Van Jaarsveld (2004:7) summaries the commercialisation process as follows:

*“A typical concession allows a private operator to construct and operate tourism facilities within a national park on the basis of a 20-year contract. Investors have either taken over or are upgrading specified existing lodge facilities, or they are in the process of building new ones. In most cases the concessionaire is granted exclusive commercial use rights to a defined area of land, typically between 5 000 hectares and 15 000 hectares in extent within a national park in return for payment of concession fees. At the end of the contract term all facilities revert to SANParks. The contractual mechanism is a concession contract which gives rights of occupation and commercial use of the land together with a set of obligations on the part of the concessionaire regarding financial terms, environmental management, social objectives, empowerment and other factors. Infringement of any of these requirements carries specified penalties, underpinned by performance bonds, and finally termination of the contract, with the assets reverting to SANParks. All aspects of biodiversity management continue to be performed by SANParks, consistent with the park management plan.”*

*“Although the primary objective of the Concessioning process was to generate more revenue for the organisation, the processes were designed to encourage partnerships that exhibited the correct mix of financial strength, requisite experience and strong empowerment credentials. The focus of empowerment was on promoting and providing business opportunities for historically disadvantaged entrepreneurs, in particular those from local communities living adjacent to national parks. This was particularly necessary because South Africa’s history has been such that the majority have been excluded as the users and beneficiaries of the national park system. In order to encourage a constituency for conservation and support for national parks among the majority of South African citizens their empowerment is considered by SANParks to be vital. For the purpose of the concessioning programme, economic empowerment comprised three principal elements: shareholding, affirmative action and training, and the economic empowerment of communities through the development of small, medium and micro-enterprises (SMMEs).”*

### 3.1.1.1 Accommodation concessions

Seven accommodation concession contracts in KNP were agreed in December 2000, which guaranteed SANParks a minimum income of R202 million<sup>3</sup> over a 20-year period. Three of the concessionaires were black-controlled consortia; and all of the others had significant percentages of shareholding by Historically Disadvantaged Individuals (HDIs). The average percentage of HDI shareholding in the seven concessionaires, either immediately or contractually bound to be in place within 3 years, was 53% (SANParks, 2001) (see Table 2). The concessions added approximately 250 beds to KNP’s existing accommodation facilities (KMPG, 2002).

<b>Concession</b>	<b>Lodge</b>
Singita	Singita Lebombo Lodge
Jock	Jock Safari Lodge
Mluwati	Imbali Safari Lodge
Jakkalsbessie	Tinga Private Game Lodge
Lwakahle	Lukimbi Safari Lodge
Mutlumuvi	Rhino Walking Safaris
Mpanamana	Shishangeni Lodge

The concession contracts address sustainable development issues of economic, environmental and social performance.

- **Financial aspects:** Concession contracts are 20 years long, with no right to renew or right of first refusal. SANParks considered this would be sufficient time to encourage real investment in infrastructure and for concessionaires to generate real returns on their investments. Concessionaires pay an annual concession fee, which was determined as a percentage of turnover, with a minimum payment. During the first year, concessionaires were held to a ‘Bid and Development Bond’ of R250 000 that was designed to ensure that they would proceed with their proposals. If the concessionaire failed to implement the project within a specified period, they would forfeit the bond. A system of financial penalties is in force throughout the life of the concession for breaking rules, damage to environment, non-respect of empowerment obligations, etc. The whole relationship is supported by a performance bond set at R20 000 per bed, which SANParks can use if the concessionaire fails to adhere to their contract. Ultimately, the Concession can be terminated for persistent or serious breaches and the rules for this are clearly set out including financial settlement (van Jaarsveld, 2004).

<sup>3</sup> In real Net Present Value terms.

- **Environmental aspects:** Concessionaire's operations are governed by the National Parks Act, the Park Regulations, and specific concessionaire Environmental Guidelines. Each concession was subject to a site-specific Environmental Impact Assessment (EIA) and the development of an Environmental Management Plan. The rules and regulations include the appointment of an environmental control officer; protection of cultural and natural resources; biosphere manipulation; site carrying capacity; visual impacts; bulk infrastructure; the location, construction and maintenance of roads and tracks; fire management; artificial water points; staff accommodation; access; and codes of conduct for tourism activities (i.e. drives, walks and off-road driving.) There are various reporting requirements on these regulations, together with regular monitoring of compliance (van Jaarsveld, 2004).

Specific quantifiable monitoring targets were designed by SANParks for environmental aspects of the concession sites (Spenceley, 2004a):

- **Road length:** Maximum length of new road was defined in kilometres specifically for each concession area;
- **Carrying capacity:** A maximum number of beds was defined specifically for each concession area, which included both guests and staff;
- **Water consumption:** A limit of 350 litres per person, per bed was defined, and water sources had to be stated. Concessionaires were required to install and maintain meters, which SANParks would monitor;
- **Waste water production:** Estimates of volumes of waste water produced daily were required, in addition to monthly monitoring and reporting to SANParks.
- **Waste production:** Although the tenders did not set targets to reduce volumes waste annually, they did submit estimates for volumes of waste that were likely to be produced, in addition to detailing methods of disposal. Concessionaires were not permitted to create landfill sites within KNP;
- **Game drives and sightings:** Limitations on distances guests could venture from vehicle during a game drive was 50 m; minimum approach distances to Big-5 wildlife was 40 m; and maximum drive speeds of 25 km/h on field tracks and 40 km/h on gravel roads were prescribed.

There is a system of penalties if the concessionaire or one of its employees or sub-contractors, commits breach of regulations or EIA and even termination in the case of persistent or repeated breaches (van Jaarsveld, 2004).

- **Empowerment:** The bidders set their own contractual empowerment obligations, as 20% of the award mechanism was based on empowerment commitments concessionaires placed in their bids. To get points, the bidders had to commit to progress in economic empowerment with regard to shareholding, affirmative action and training, and creation of economic opportunities for local communities. These commitments were quantifiable in terms of extent, value and time, form part of the ultimate concession contract. For example, Table 3 summarises the annual revenue for local community empowerment that was anticipated by concessionaires in their bids. Concessionaires are obliged to report on progress made to achieving these obligations every six months. Failure to realise the objectives results in financial penalties of up to R1 m and persistent failure results in contract being terminated (van Jaarsveld, 2004).

<b>Empowerment Initiative</b>	<b>Range of Revenue</b>
Construction Contract	R23,500 - R3,200,000
Accommodation in local villages	R60,000 – R900,000
Transport to and from lodging	R30,000 – R350,000
Curios	R6,3000 – R240,000
Food supplies	R2,000 – R300,000
Laundry services	R60,000 – R200,000
Game drives	R50,000
Waste disposal	R60,000 – R100,000
Maintenance	R4,8,000 – R120,000
Catering	R160,000
Furniture	R115,000
Visits to local villages	R50,000
Recycling	R30,000
Creche/aftercare	R20,000
Environmental education organisation	R16,000
Printing	R2,000
Theatre	R1,500
<i>Source: Spenceley, 2004a</i>	

Van Jaarsveld (2004) states that the private ecotourism sector has accepted higher environmental standards while proposing imaginative schemes to provide real benefits to local communities and employees. Although SANParks initially feared that the Government would remove its subsidy if it generated additional revenue, the converse has actually happened. The park has instead been the recipient of considerable additional funding through the Poverty Relief Fund (see section 3.1.3).

### **3.1.1.2 Financial achievements**

In 2004 SANParks undertook an investigation into their concessionaires' financial performance, and found that concessionaires had bid too much for the sites. Apparently the lack of information regarding the market for concessions inside national parks at the time of the tender process resulted in concessionaires bidding in a competitive environment and overestimated expectations. Un-audited financial submissions for the five KNP concessions which were operational in 2003 indicated that (van Jaarsveld, 2004):

- the aggregate turnover in 2003 was 63% lower than had been predicted;
- fixed concession fee commitments paid to SANParks amounted to R9.9 million, despite concessionaires having incurred losses of R21.2 million; and
- the concession fees paid represented 36% of concession turnover, which was more than double the original estimates, and not considered to be sustainable.

Table 4 summarises financial data of the seven KNP concessions for the first three years. Occupancies were 22% lower than the bid forecast, while the fixed concession fees amounted to R29 million, despite concessionaires incurring losses of R34.9 million (van Jaarsveld, 2004).

<b>Table 4: Aggregate summary of performance for the seven Kruger National Park concessionaires</b>		
<b>Aggregate summary of the seven KNP concessions for years 1 to 3</b>	<b>Bid Model Years 1 to 3</b>	<b>Actual/Forecast Years 1 to 3</b>
Average Occupancy	39%	17%
Total Net Revenue	R268,183,642	R94,347,352
Net Operating Income before Concession Fees	R153,918,013	R -5,827,292
Concession Fees	R 29,079,704	R29,079,704
Earnings pre- depreciation, interest & tax	R124,838,309	R-34,906,996
Concession fees as % of turnover	11%	31%
<i>Source: van Jaarsveld, 2004</i>		

The total actual capital investment for the KNP concessions was R218.8 million: 65% more than the anticipated R 132.3 million. The companies invested between 22% and 118% more than they had predicted (van Jaarsveld, 2004).

According to SANParks, the concessionaire's financial statements indicate that they are technically insolvent: they have insufficient cash to meet their current obligations, even though the fair market value of their assets exceeds their liabilities. As a result of this, various concessionaires have obtained capital moratoriums from their lenders for a period of time and also have attempted the restructuring of their shareholding in an attempt to raise funds (van Jaarsveld, 2004).

### ***3.1.1.3 Environmental achievements***

Any number of issues from shareholder disputes to environmental breaches have arisen which have needed to be managed carefully and being able to do so has maintained the integrity of the overall process. In resolving issues and monitoring compliance, SANParks has attempted to be fair-minded but firm in its approach and flexible when necessary. On several occasions SANParks has ordered concessionaires to correct deficiencies such as the removal of a radio tower, moving board walks and upgrading of roads and in other cases has fined concessionaires for misconduct. Interestingly, the concessionaires complain regularly that SANParks does not adhere to the same level of environmental standards as applicable to themselves. This was anticipated, and rather than relaxing these standards SANParks will over time have to comply with its own regulations (van Jaarsveld, 2004).

### ***3.1.1.4 Empowerment achievements***

There have been two failed attempts to contract consultants to measure the empowerment performance of the concessionaires. A third contract is being currently implemented by Empowerdex, which is initially focussing on one enterprise, Singita, as a pilot. If the audit is well received, audits of the other enterprises will be commissioned (Pers. comm. A. van Jaarsveld, 2004). An ex-SANParks official indicated that it has been difficult for some concessionaires to find equity partners, and it is up to SANParks to determine whether they are in breach of contract, or if they should be given more time to perform.

### ***3.1.1.5 Shop and restaurant concessions***

A second phase of commercialisation outsourced shops and restaurants in the parks in KNP to three companies (see Table 5). The concessionaires utilised existing infrastructure, although renovations were made in some instances.

<b>Concession</b>	<b>Activities</b>
Tiger's Eye	Retail outlets for tourist and staff at all major camps (save Shingwedzi and Punda Maria)
Nature's Group	Restaurants at all camps. Retail outlets at Shingwedzi and Punda Maria.
Mitomeni River Lodge	Afsaal picnic site shop

- **Economic achievements:** During their first year of operation from October 2001 to September 2002, the revenue for the retail outlets operated by Tiger's Eye increased by 35% over the previous year when operated by SANParks. The revenue from restaurants and shops operated by Nature's Group increased by 38%, and the revenue to Afsaal jumped by 61% (PWC, 2003).
- **Empowerment achievements:** Fearnhead (2004) indicated that the tenders would provide a guaranteed annual spend of R6.9 m in adjacent HDI communities; with an additional R7.1 m spend there during the renovation phase. Nature's Group has an equity arrangement that includes 40% BEE, 10% Community Trust, and 10% ownership by employees. Similarly to the accommodation concessions, a pilot empowerment audit is being undertaken by Empowerdex on Tiger's Eye; the results of which should be published in early 2005 (Pers. Comm. G. Varghese, SANParks) but had not been seen by the time of this report.

### 3.1.1.6 4x4 routes

Land Rover is sponsoring a guided and self-contained Lebombo Eco Trail for 4x4s. The safari is run over five days and four nights, starting at the Crocodile Bridge rest camp in the south of KNP, and running along the park's eastern border with Mozambique, all the way to the picturesque Pafuri picnic site on the northern Limpopo River border with Zimbabwe. Land Rover sponsors a guide in a sponsored Land Rover vehicle to lead the trails. The trail costs R3 500 per vehicle including entrance fees (Anon, 2004).

### 3.1.2 National Treasury Tourism Infrastructure Investment Programme for the Great Limpopo Transfrontier Park

The National Treasury granted the Department of Environmental Affairs and Tourism (DEAT) R40 bn to invest in tourism infrastructure within the GLTP at the end of 2002. A summary of progress on this tourism infrastructure is presented below (Theron, 2004; Swanepole, 2004):

- **Giriyondo Border Post (R7.62 m):** Construction of the proposed Giriyondo Border Post between KNP and Limpopo National Park (LNP) in Mozambique. Development included the provision of water, electricity, and staff accommodation. The South African side of the border post and accommodation has been completed at a cost.
- **Upgrading of existing access road to the Giriyondo Border post (R3.38 m):** The existing road was upgraded and re-surfaced and will be the main access road from KNP to the southern part of LNP, with access to Massingir Dam.
- **Upgrading of the existing access road to the Pafuri Border Post (R14.96 m):** Upgrading the existing access road to the Pafuri Border Post to a tar road, and resurfacing the access road from the Pafuri border post to the crossing point over the Limpopo River.

- **Development of a crossing point over the Limpopo River to link the Kruger National Park with Zimbabwe (R0.8 m):** Planning and development of the crossing point.
- **Upgrading of existing road network north of Shingwedzi to facilitate tourist travel between KNP and LNP (R1.98 m)**
- **Development of an overnight facility at Pafuri (R3.6 m):** Development of a tented camp and pool on the Levubu river at Pafuri in order to provide an overnight facility for visitors crossing from KNP to LNP or Zimbabwe.
- **Dropping of 20km of fence between KNP and the southern section of the LNP (R0.49 m)**
- **Development of research infrastructure in KNP (R3.56 m):** A facility in the Northern KNP, which can also be used for research, monitoring and data storing to facilitate adaptive management within the GLTP.
- **Development of tourism interpretative centres and picnic sites at cultural and historical sites (R1.75 m):** This was undertaken at sites located close to crossing points into Mozambique and Zimbabwe, as recommended by the GLTP Integrated Regional Tourism Development Plan.
- **Relocation of Pafuri Entrance Gate (R7.4 m):** Moved to the new western boundary fence of KNP, according to recommendations made by the GLTP Security Working Group, with an environmental education centre and a day visitors site.

SANParks' contractor development programme has focussed on the development of civil and building contractors from the communities surrounding the KNP who will be able to become involved in the Parks' capital and maintenance works. Local contractors have been trained using donor funds. Seven people received certificates for management training and 20 people obtained certificates for technical skills (Anon, undated a). SANParks implies that these contractors were used during the construction of the above facilities, although no information was available that addressed in detail what proportion of these contracts were granted to SMMEs.

### 3.1.3 Poverty Relief Fund

DEAT's Poverty Relief Fund is aimed at growing tourism market share and investment, protecting and conserving South Africa's environment, and building the nation (DEAT, undated). Poverty Relief Fund money has certain socio-economic conditions attached to it, such as the following (DEAT, undated):

- between 2% and 4% of the project budget must be dedicated to training and capacity-building, and all training must be accredited to enable the trainee to either manage the funded project or seek employment elsewhere with the skills or knowledge gained;
- projects must promote the creation of SMMEs and favour Previously Disadvantaged Individuals (PDIs);
- 90% of temporary jobs created must go to local people;
- 60% of the temporary and permanent jobs should be reserved for women; and
- 20% to youth and 2% to disabled people.

The Poverty Relief Fund funded two major projects within KNP between 2002 and 2004: upgrading staff accommodation (R10 m) and partial upgrading of the western boundary's foot and mouth fencing (R2.5 m). A SANParks official recently commented that the Poverty Relief Fund now provides a substantial proportion of SANPark's income, and in the 2003 financial year constituted 23.5% of the total income (R74.83 m) (SANParks, 2003).

### 3.1.4 Makuleke

The Makuleke people were forcibly removed from a 24,000 ha area that they inhabited in the north of KNP in 1969 by the state. They were compensated for their relocation in 1998, with the restitution of their land and the creation of a contractual park (Elliffe, 1999). A 25-year agreement was forged between the Makuleke and SANParks to return the ownership and title of the land to the people, although the title specifies that the land may only be used for wildlife conservation (Steenkamp, 1998; Steenkamp and Grossman, 2001). The contract that governs the incorporation of the Makuleke land in KNP enables them to make sustainable use of specified natural resources (Pers. comm. Koch, 2002). They have the option to construct six small camps with a cumulative occupancy of 224 beds (Grossman and van Reit, 1999).

The present-day Makuleke community consists of three villages outside the park, with a total population of approximately 10,000. Most of the men work in Johannesburg, while some of the women work as domestic workers in nearby towns (although this activity is limited by their household responsibilities). Some families are very poor and have no cash income, and an average family of 7 to 10 people survives on the R620 (~US\$60) monthly pension of an elder in the family. The area has four primary schools and one high school. Transport is only available through taxis that do not service all the villages due to poor roads, and only a few people have cars (Ford Foundation, 2002).

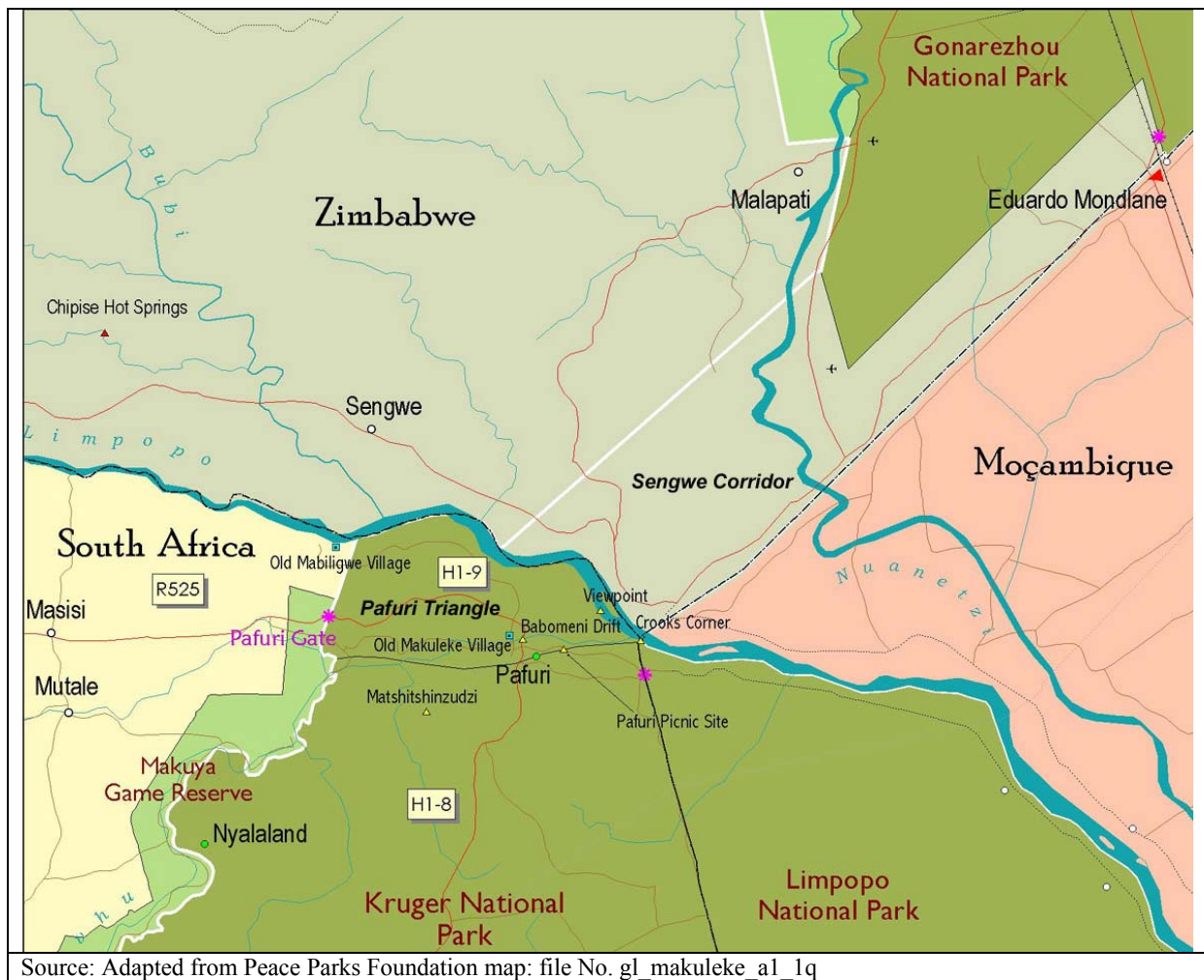
The area of land in KNP owned by the Makuleke Common Property Association (CPA) is called the Pafuri Triangle (CESVI, 2002) (see Figure 2). The land stretches from the Limpopo to the Luvuvhu River, and therefore at the centre of the GLTFCA. The area has been identified by some environmentalists as Kruger's best birding area, because many of the central African species find their way here. Elephant, nyala, lion, leopard and bushbuck are among the most common wildlife species encountered regularly in the densely wooded region (Nel, 2004).

By 2001 there were concerns that South Africa was rushing the process of developing the GLTFCA, and paying little attention to local people living inside areas of Mozambique and Zimbabwe. There had been no mention of the effects of the proposed conservation area on the Makuleke (Magome, 2002).

#### **Trophy hunting**

Trophy hunting is a controversial issue but is important in the Makuleke case because it has been able to deliver quick revenues to local people, during the period while lodges and camps are being built (THETA, undated). The trophy-hunting project affords the Makulekes a tangible material benefit that is enjoyed by the entire community, in that the "venison" acquired from a hunt is equally distributed to every household. However, some Makuleke are of the opinion that these community wide benefits are not substantial enough (Ford Foundation, 2002). The CPA wants to phase out hunting as the lodges and camps begin to bring tourists and revenue to their area (THETA, undated).

**Figure 2: Makuleke's Pafuri Triangle and the Sengwe Corridor**



Although proposals for hunting initially met with strong objections from the management of KNP who argued that hunting should not take place in a national park, the Makuleke successfully argued that it was appropriate in a Contractual National Park (Magome, 2002).

The Makuleke CPA offered a private safari company the rights to hunt two elephants and two buffaloes as trophy species in 2000 (THETA, undated). This quota for hunting was determined in a general meeting of the community and reviewed by the JMB (Ford Foundation, 2002). The company, Wayne Wagner Safaris, was given a renewable contract, after an open tender process in which the Kruger Park and Professional Hunting Association of South Africa acted as observers (THETA, undated)

The first hunt earned the CPA about R520 000 (~US\$80,000) and this has been allocated to a variety of development projects in the village (THETA, undated). The income was also used to purchase a car for Chief P. J. Makuleke. Previously, the chief had to rely on borrowing the cars of others. The fact that the chief owns a car is a manifestation of asset building that the community is proud of (Ford Foundation, 2002). In addition, the meat from the elephants and buffaloes was equally distributed among people in the villages (THETA, undated).

In 2001, the hunting of a small number of 4 impala, 3 zebra, 4 buffalo, 2 elephant and 1 kudu was allowed, and after some negotiation with SANParks, the hunting of 1 eland and 4 nyala was also permitted to the same operator (Ford Foundation, 2002). In May 2001 the Makuleke earned a further R800,000 (~US\$130,000) from the second hunting quota (Magome, 2002). The income for

2001 was spent on the partial completion of the cultural interpretation centre, on operating costs of the CPA office, and on the purchase of a motor vehicle for the use of the Executive Committee of the CPA (Ford Foundation, 2002).

By 2002 the CPA realized that the most money was to be made by hunting elephant and buffalo and they allowed 3 elephants and 6 buffalo to be hunted. The total estimated value of the trophy-hunting quota that year was approximately R 1.8 million (about US\$180,000) (Ford Foundation, 2002).

In 2003 they increased the quota to 5 elephants and 7 buffalo and generated about R1.5 million for the CPA to spend on community projects. Some of the projects supported include improving the schools, bursaries for top students, boreholes, and food for the poorest families in the villages. As previously, the meat from the hunted animals is given to the community once the hunter has taken his trophy (Collins, 2003).

Also in 2003 the Makuleke indicated that although hunting had been their source of income they had decided to downscale this significantly due to the perception that photographic tourism would not work together with hunting in their small area and limited road network. Therefore in the long term the key source of benefit flow to the community will be through skills enhancement and wages. They anticipated that there would be about 150 full time jobs for the Makuleke earning about R375 000 per month (Makuleke, 2003; Collins, 2003).

### **Photographic tourism**

Makuleke's CPA has a contract with a private sector partner, Matswani Safaris, who developed a luxury 24-bed lodge called The Outpost on the confluence of the Luvuvhu and Mutale Rivers (THETA, undated). The lodge cost between R10 and 15 million (~US\$1 million to \$1.5 million) to construct, and the development began in 2002 (Ford Foundation, 2002). The lodge is an up-market establishment, designed to have low environmental impacts. An initial fee was paid to the Makulekes on signing of a contract, and Outpost Lodge has provided a bond to guarantee its performance for the duration of the agreement (THETA, undated). In addition, the Outpost pays the CPA 8% gross earnings generated by the business, a traversing fee for game drives, and 2% of gross earnings into a social development fund earmarked for the education of Makuleke youth (Ford Foundation, 2002). They also pay a monthly traversing fee for every vehicle based in the Makuleke region. (THETA, Undated). Projections have indicated that when running at 60% occupancy the lodge will pay an annual rent of US\$75,000 to the Makuleke community, and around US\$150,000 to the 30 local employees (Koch, 2001; THETA, Undated). This would generate an estimated US\$400 per family through the initiative, which is significant in relation to the average annual wage of around US\$750 (Koch, 2001).

In July 2003, the CPA announced an R45 million concessionary agreement with Wilderness Safaris to build 3 luxury low-impact tented lodges (Turner, 2004). Wilderness Safaris propose to invest R20-30 m and are currently undertaking an EIA process (costing ~R4 m) (Pers. com. C. Bell, 2004). Wilderness Safaris state that the Makuleke would receive a percentage of turnover, rather than a flat rental fee, community members would receive training and employment (up to 200 jobs), and some scholarships would be provided (Turner, 2004).

The key aspects of both tourism partnerships are (Makuleke, 2003; Collins, 2003):

- the CPA receives 8-10% of turnover (see Table 6), negotiated during the tender process;
- capital investment on their land;
- the community is guaranteed a high proportion of the jobs and skills training to be able to take up the long-term employment and short term construction jobs; and
- the arrangement is a built-operate-transfer one, which means that their partners will build and operate for a specific number of years and then they will transfer the ownership of the lodge to the CPA. The Makuleke can then decide if they want to run it themselves or invite the partners to operate on different terms (as they will then own the facilities).

	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>
Concession Fees	R 744 640	R2 781 532	R3 460 113	R6 603 205
Permanent Jobs	R1 901 340	R2 308 488	R2 577 301	R9 345 564
Anti-poaching	R 430 000	R 430 000	R 430 000	R 430 000
<b>Totals</b>	<b>R3 075 981</b>	<b>R5 520 022</b>	<b>R6 467 417</b>	<b>R16 378 773</b>
Source: Collins, 2003 (Note: The South African Rand was about R7 to 1 US\$ or R8.5 to 1 Euro at this time)				

The CPA is constructing a cultural center and guesthouse in the Makuleke village on a site overlooking the Soutpansberg Mountains. The site is about 12 km from the Punda Maria gate into Kruger. The construction of the multipurpose cultural interpretation center initially employed 36 people (Ford Foundation, 2002), which then rose to 47 (THETA, undated). The centre has incorporated traditional architectural styles will be used as bed-and-breakfast accommodation for tourists, as a community centre for community gatherings such as cultural festivals, and other catering purposes. The centre was funded by a grant from the national Department of Public Works. Skilled laborers on the project earned R50 (US\$5) per day and unskilled laborers earned R30 per day. However, government funds proved to be insufficient for the project because the Makuleke had submitted a proposal that underestimated the costs. Despite injections of revenue from income generated by other projects, the building remains incomplete. The Makuleke are submitting new business plans to the Department of Public Works for additional funding (Ford Foundation, 2002).

## **Training**

The Makuleke CPA has already conducted extensive training programmes making use of a wide range of service providers. The tangible revenues that the hunt brings to the local residents, has encouraged the CPA to train local people as wildlife managers. Training programmes for the Makuleke have included the following (Anon, 2001; THETA, undated):

- 26 students trained in conservation management, tourism and business skills at a technicon level;
- 7 Makuleke residents received specialist training as safari guides;
- 2 students working with Kruger field rangers in the Pafuri section of the park and trained to store and interpret GIS mapping data from Cybertracker wildlife monitoring in the park;
- 47 residents of the Makuleke participated in a skills development programme facilitated by the Northern Training Trust and funded by the Department of Labour;
- the Executive committee of the Makuleke Communal Property Association have undertaken a leadership training programme; and
- a manual based on the Makuleke experience has been produced by the Southern African Development Bank and GtZ Transform.

## 3.2 Zimbabwe

In Zimbabwe the GLTFCA consists of Gonarezhou NP, and is proposed to include the Sengwe communal area. The Malilangwe Trust, Save Valley Conservancy, and adjoining communal land are also proposed for inclusion. The plan also suggests that the Biosphere concept could also be extended north from Save to reach Gorongosa National Park.

A representative of SANParks reported that no tourism investment is currently occurring in Zimbabwe, although it was suggested that stakeholders were discussing the prospect of raising development funds.

There was a rapid growth in tourism once the country gained independence in 1980. Between 1989 and 1999 tourist arrivals grew at an average growth rate of 17.5% whilst tourism receipts increased at an average annual growth rate of 18% in US\$ terms. However, the Zimbabwe Tourism Authority (ZTA) reports that the prevailing economic, social and political environment has led to an 11% drop in tourist arrivals (1999 –2000) and 38% drop in receipts (US\$) within the same period (ZTA, 2001) (see discussion in section 4.3.2.1).

### 3.2.1 Gonarezhou National Park

Gonarezhou National Park (GNP) lies on the southern Zimbabwean border with Mozambique. It does not have a common boundary with either KNP or LNP, but such linkages are proposed via the Sengwe Corridor (KPMG, 2002). Gonarezhou has one rest camp, Mwenezi, providing rondavels with 16 beds, providing the only roofed accommodation in the park. The transport infrastructure, although available in and around GNP, is in a state of disrepair due to poor funding and maintenance. Roads are untarred in the park, poorly maintained, and mainly accessible by 4x4. There are no internal roads connecting the north and south sections and there are no facilities in the centre of the park – existing roads reportedly lead no-where, are not tarred and are in poor condition (KPMG, 2002; JMB, 2002). GNP is accessible from tarred A10 at Chipinda Pools and Mahenya, with a single-laned road. Chiredzi's Buffalo Range Airport does not have scheduled flights, but local operators have to charter flights when required. Malapati aerodrome is 15 km from Shimuwini Rest Camp, and a freight transport rail service stretches along the edge of LNP and traverses GNP (KPMG, 2002). There are five airstrips in the park, although the Strip at Fishans and Chipinda Pools are closed (JMB, 2002). There is no mains power in the park, and generators are used at Chipinda Pools and Mabaluta (JMB, 2002).

Between 1996 and 1998 there were approximately 6000 visitors to Gonarezhou annually, of which around 20% were foreigners. In 2000 this number declined steeply (along with other areas in the country) to just over 2000 per annum, of which more than half were day visitors (JMB, 2002).

The 1998-2004 GNP Management Plan proposed the creation of 13 'undeveloped' campsites and 15 developed sites, 20 day-visitor picnic sites in addition to new hides and viewing points (KPMG, 2002). Reports from the ZTA indicate that during 2004 the Ministry of Finance allocated Z\$17.9 billion (R26 million) to upgrading international airports, including refurbishing the Buffalo Range Airport, which is used to reach Gonarezhou. The state also allocated Z\$2.2 billion (R3.2 million) to upgrade existing tourism facilities in GNP. It was indicated that they had begun with three main areas of road development, electrification and communications to provide for accessibility for interested investors to develop campsites. However, the ZTA indicated that a lack of funds had put on hold de-mining programmes along the borders (Chikanga, 2004).

There has been no evidence of tourism investment in Gonarezhou since 2000.

### **3.2.2 Private tourism enterprises**

Tourism developments of note in South-east Zimbabwe, proposed to be included within the TFCA, include (de la Harpe, 2002):

- Mahenye and Chilo Gorge Safari lodges of ZimSun in the Communal Land across the Save River from Gonarezhou;
- Nduna Safari Lodge and Pamushana in Malilangwe;
- Senuko Safari Lodge and a number of smaller initiatives in the Save Valley Conservancy; and
- a number of smaller private initiatives spread throughout the region, including the other Conservancies.

Reports from Zimbabwe indicate that due to political turmoil and the depressed state of the tourism industry in Zimbabwe, no new tourism developments have taken place in the GLTFCA since 2002. Only Pamushana Lodge, within the Malilangwe Trust, has received additional investment during that time (Pers. comm. D. de la Harpe, 2004). At Malilangwe, investment has concentrated on renovations and maintenance on accommodation, fencing and roads (de la Harpe, 2003; 2004).

### **3.2.3 Sengwe Communal Land**

Sengwe Communal Land (SCL) is in the southern part of Chiredzi District, and located on the southern international border of Zimbabwe. The point where the borders of Zimbabwe, Mozambique and South Africa meet, Crook's Corner, is almost at the middle of the southern border of the SCL. The western half lies adjacent to the northern border of KNP, and the eastern half is adjacent to the Chicualacuala District in Mozambique. This is separated from LNP but a wedge of unprotected land. Due to its strategic location, any linkage between KNP and Gonarezhou must lie within the SCL, and the 'Sengwe Corridor' could form this direct link (CESVI, 2002) (see Figure 2).

Since the multi-ethnic group living in the Sengwe area is remote from the power centres of Zimbabwe, they have been able to survive on an illegal economy including border-jumping, poaching, smuggling, stream bank cultivation (Dzingirai, 2004). The main source of income is payment from expatriate workers in South Africa, who are predominately illegal immigrants, in addition to selling palm wine, illegal hunting, and stream-bank cultivation. Legal cultivation is a minor livelihood source due to variable rainfall and flooding, while livestock is limited by foot and mouth disease (CESVI, 2002). Dizingirai (2004) states that the GLTFCA will lead to displacement of people living in Sengwe to make way for wilderness areas, will take away access to fertile arable land in the corridor, and will remove access to communal property land and resources. These resources include grazing land, water resources and natural products. Given that the Zimbabwean government is almost bankrupt (Bond and Manyanya, 2002), it is unlikely that relocated people will be provided with start-up capital, and will therefore need to approach donors and relatives for funds.

There is one safari operator in the Sengwe area, and appears to be expected to address problem animal concerns in the communities (Dzingirai, 2004). However, due to reductions of fuel caused by the political and economic climate in the country, they lack the capacity to assist (Dzingirai, 2004), coupled with the perception that animal control is peripheral and in some cases as perilous to safari operations organized a disciplined and systematic off take of trophy animals (Holleman, 1969).

A proposal has been put forward to demarcate a wildlife corridor between Kruger and Gonarezhou. The area does not contain any settlements or cultivation currently and therefore would not require any relocation of households. The area could become a contractual park, remaining under communal land tenure, equivalent to the Pafuri Triangle owned by the Makuleke. Through a process of consultation, the communities, the TFCA committee, Rural District Councils (RDCs) and communities agreed to set aside a strip of land parallel to the Limpopo River for wildlife that would not be settled, cultivated or used for livestock. The corridor varies between 0.6 km and 2.3 km wide, and has an area of approximately 20 km<sup>2</sup>. If a border crossing is installed between the northern end of KNP and the Limpopo strip, this would allow tourists from KNP to access the Sengwe area on their way to Gonarezhou (CESVI, 2002).

Economic activities proposed for the Sengwe corridor include (CESVI, 2002):

- **Safari hunting;**
- **Wildlife and landscape-based tourism** – photographic tourism, with small high quality wilderness style lodges (e.g. 24 beds) with joint-venture agreements between the private sector and communities. Three potential lodge sites have been identified by communities;
- **Cultural tourism** – based on the traditional lifestyles of the Hlengwe communities in Sengwe and Chipise;
- **Craft and veld products:** Sengwe area already has a craft association facilitated by the NGO SAFIRE. Products may include marula and Zyziphus jams, in addition to cosmetics made from Kigelia (Sausage Tree) pods; and
- **Agricultural produce:** Sale of farm produce to lodges – including vegetables, fruits and poultry – which would require small-scale irrigation projects and rehabilitation of transport infrastructure.

It is anticipated that the TFCA will bring additional wildlife resources into the corridor that can be exploited by people for revenue through trophy hunting, and that additional tourists attracted to the area by the wildlife will spend money in the local area (e.g. on craft) (Dzingirai, 2004). However, experiences by people in Sengwe have indicated that their experience of CAMPFIRE is that the state and rural district councils (such as Chirezi RDC) are not interested in sharing benefits, but rather aim to retain as much revenue as is possible for their bureaucratic processes (Murombedzi, 1992). There is a lack of institutional structures in the area that can claim revenue, or can engage with the state (Dzingirai, 2004). People are also concerned that their existing ability to cross the border to South Africa will be restricted by the need for passports and visas. Since Zimbabwean travel documents are difficult to obtain, save through means of corruption, locals see this inevitable requirement as one intended to inhibit their mobility. They are also concerned about potentially fees for importing goods and the likelihood of goods being impounded by officials (Dzingirai, 2004). These activities have been strategies used by the poor to survive in a marginal environment, and they are threatened by the TFCA.

There is significant potential for the TFCA and tourism investment to affect livelihoods within the Sengwe corridor, incurring both costs and benefits.

### 3.3 Mozambique

The civil war between 1982 and 1992 not only destroyed the market for tourism but also the Mozambique's tourism infrastructure (Christie, 2004). Tourism arrivals reached an estimated 400,000 in 2001 (equal to the pre-war visitation level in 1972) but Christie (2004) indicates that this is more of a *guesstimate* than the result of the availability of sound data, and that the majority of visitors travel on business. There are roughly 12,000 rooms in Mozambique serving tourists, about 5,000 in so-called international quality establishments (defined as three star or more). The

Government estimates that tourism contributes 1.2% to GDP (Christie, 2004). Tourism is the third largest investment sector in the country (World Bank, 2004).

The GLTFCA in Mozambique is proposed to include LNP, Banhine and Zinave National Parks, the interstitial areas, Coutada 4 (which lies on the north bank of the Save river) and almost reaches the coast. In addition, it is proposed that through a Biosphere approach the area could be extended east to the coast between Xai Xai and Inhambane, and south towards Coromane Dam, cross the Komati, and follow the Lebombo mountains to Swaziland, Mlawula Game Reserve and the Pequenos Lebombos to link with the Maputo TFCA and the Lebombo SDI (JMB, 2002).

Currently LNP has a small tourist camp operated by a private contractor. There are no facilities in Zinave or in Banhine National Parks, and access is difficult (UNEP/WCMC, 2004).

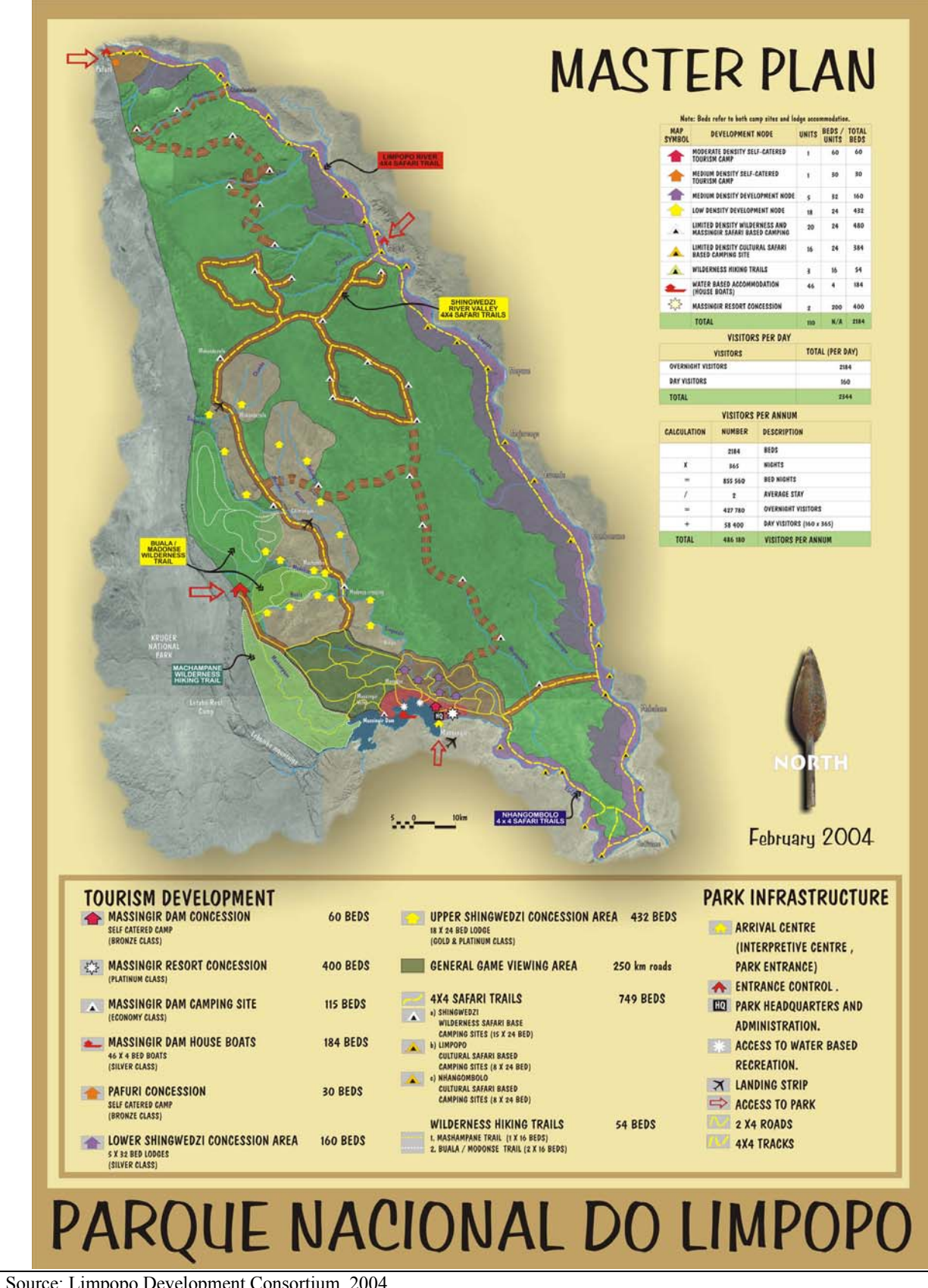
### **3.3.1 Limpopo National Park**

LNP was a hunting zone (Coutada 16) until November 2001 when it became a national park (Huggins *et al.*, 2003). There is virtually no infrastructure in or around LNP, and much of it degraded during flooding in 1999. Aside from small camps of 4-6 tents constructed by Gaza Safaris, the previous hunting concessionaire, there is no tourism infrastructure inside LNP (Pers. Com. G. Vincente, 2004). Although Gaza Safaris established a basic road network of about 1600 km to facilitate access to remote areas of the park, these are untarred and 4x4 vehicles are necessary. They also constructed an airstrip near Macandezulu, while Massingir has a tarmac airstrip 1800 m long (KMPG, 2002; JMB, 2002). There is no electricity in the LNP, although bulk power lines from the Cahora Bassa power station in South Africa run through the northern tip of the LNP towards Phalaborwa (JMB, 2002).

When Coutada 16 became a national park, Gaza Safaris still had nine years remaining on their hunting lease (Pers. Com. G. Vincente, 2004). The company is to be compensated for the removal of its right to hunt, by being awarded a percentage of the total number of beds earmarked for tourism development in the park (i.e. ±70 beds: 10%) (Schuerholz, 2003).

Tourism in LNP is predominately at the planning stage, a tourism masterplan (see Figure 3), zoning plans, and an infrastructure development plans have been drawn up. The Tourism framework identifies five forms of tourism that can be accommodated in LNP: recreational, adventure, consumptive, cultural-historical, and ecotourism (Limpopo Tourism Consortium, 2004). KfW has helped to finance comprises the construction of a network of safe roads, basic infrastructure for the establishment of private tourist camps and lodges, fences to protect the villages from roaming wildlife, and the construction of health stations and village schools in the fringe areas of the park. Clearing the LNP of landmines is largely completed (KfW, 2004).

Figure 3: Masterplan for Limpopo National Park



Source: Limpopo Development Consortium, 2004

In addition to facilities for administration, game rangers, and environmental education, the LNP Tourism Development Plan proposes four entrance gates (i.e. at Massingir, Giryondo Border Post, Mapai, and Pafuri Border Post) (Limpopo Tourism Consortium, 2004). A road from Massingir to Giryondo is proposed to establish access from the Kruger National Park into LNP, in addition to a series of loop roads in the moderate-use zones of the PNL for tourists. Tracks for 4x4s are proposed for safaris and park management around Limpopo, Shingwedzi, Makandezulo, Mapai and in the Sandveld area. View-points are proposed along these routes at suitable points. This management infrastructure will be developed in phases over a period of time, depending on the availability of funding.

The LNP Tourism Development Plan proposes to develop Park Authority Developments (PADs). These will allow tourism opportunities to be developed and managed initially by the park with the aim of transferring them to Concessionaires in future. The plan indicates that the development of tourism opportunities by LNP is seen as an initial and interim arrangement, to allow tourists to visit the Park, while a Concession Process is developed and implemented. Although PNL will fund and develop the PADs, they will be operated by the private sector (Limpopo Tourism Consortium, 2004).

It is predicted that in addition to the 2184 potential overnight visitors, 160 day visitors will also be able to enter LNP (see Table 7). At capacity, and with a 2-night average stay, it is anticipated that the park may have a capacity of 486 180 visitors per annum (Limpopo Development Consortium, 2004).

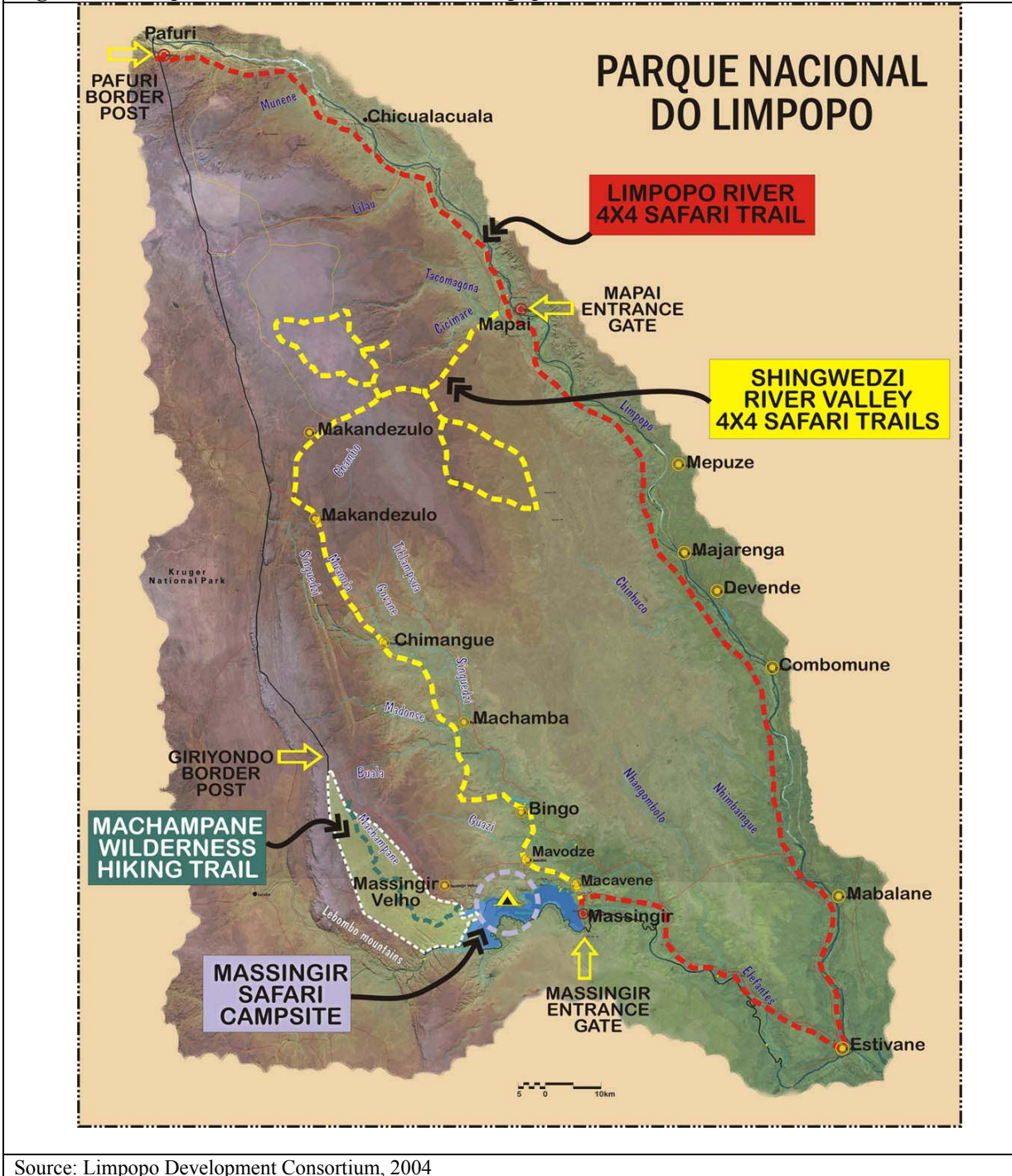
<b>Development type</b>	<b>Units</b>	<b>Beds per unit</b>	<b>Total beds</b>
Moderate density self-catered tourism camp (Massingir dam)	1	60	60
Medium density self-catered tourism camp (Pafuri concession)	1	30	30
Medium density development node (Lower Shingwedzi area)	5	32	160
Low density development node (Upper Shingwedzi area)	18	24	432
Limited density wilderness and Massingir safari based camping	20	24	480
Limited density cultural safari based camping site	16	24	384
Wilderness hiking trails	3	16	54
Water based accommodation (house boats) (Massingir dam)	46	4	184
Massingir resort concession	2	200	400
<b>Total</b>	<b>110</b>	<b>n/a</b>	<b>2184</b>

Source: Limpopo Development Consortium, 2004

The 3-year first tourism concessions have been put out to tender in LNP, for the Machampane Wilderness hiking trail and two 4x4 safari trails (see Figure 3). The hiking trail is proposed to consist of a Base Camp with four 2-bed tented accommodation for guests, as well as a camping area for back-packers, ablution, kitchen, and office and staff facilities. LNP anticipate that there will be both luxury and back-packer components of the trail. The 4x4 trails will be in two locations - along the Limpopo River and Shingwedzi Valley (see Figure 4) and will consist of existing tracks, with 7 designated camping areas. Each camping area will be demarcated and cleared, with water and ablution facilities provided. While Shingwedzi will have a guided trail, the Limpopo River will have both guided and self-guided trails (Vincente, undated). A professional team of architects, engineers and quantity surveyors has been appointed to oversee the development of infrastructure for the park (Codex dds, 2001-2004). Three companies tendered for the 4x4 trails, but only one – Afrotourism from Botswana – fulfilled the tender criteria. This company will operate under the name ‘The Global Image’ (Pers. com. G. Vincente, 2004).

For the Machampane Wilderness Hiking Trail, LNP will fund the basic fixed assets (estimated at € 122 500), while movable and other assets will be funded by the Operator. The Limpopo 4x4 Safari Trail will be funded similarly (with €88,560 from LNP) while the Nhangombolo 4x4 Safari Trail will not required initial investment from LNP (Limpopo Development Consortium, 2004).

**Figure 4: First phase tourism concessions for Limpopo National Park**



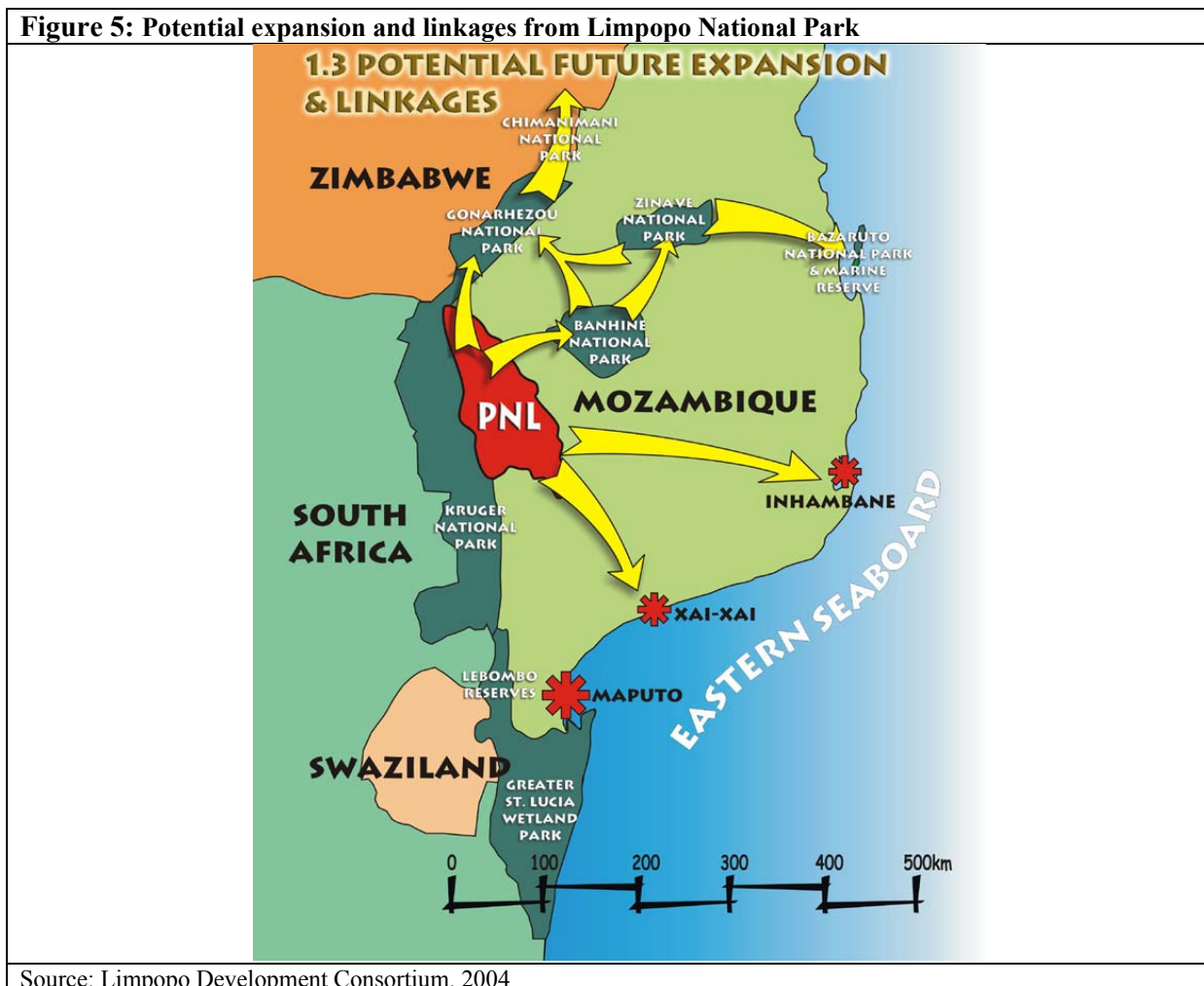
The Peace Parks Foundation (PPF), an NGO working on the TFCA, summarises progress in Mozambique as follows: (Codex dds, undated):

- an anti-poaching drive has been launched leading to the confiscation of 40 firearms. The anti-poaching unit in LNP works closely with its counterpart in KNP;
- a de-mining contractor has completed 70% of the de-mining;
- a total of 1 987 animals have been translocated into a wildlife sanctuary as a first phase of restocking LNP; and
- seventy-three field rangers have been trained and deployed in the park, while and workshops between communities and field rangers have been held to enhance collaboration and cooperation.

The LNP draft Business Plan indicates that capital investment for tourism between 2003 and 2004 will be €78 k (5.4%) of a total €14.36m to be spent between 2003 and 2006. Tourism operating expenses between 2003 and 2006 are predicted to be €108.4 k (4.0%) of €2.69 m for the period (Limpopo Development Consortium, 2004).

The business plan indicates that a future focus will be an ecological corridor that links the LNP with the Banhine NP, coupled with a potential extension of a corridor to the Zinave NP and to the coast (see Figure 5). Similarly, the Joint Management Plan for the GLTP does consider a vision for future expansion, and indicates that the wider GKG will have more direct benefits to people (JMB, 2002). A current GTZ funded Community Based Natural Resource Management (CBNRM) project in the Limpopo/Banhine corridor is considered a piece of the mosaic leading to the accomplishment of the ambitious corridor protection goal (Schuerholz, 2003).

**Figure 5: Potential expansion and linkages from Limpopo National Park**



Source: Limpopo Development Consortium, 2004

Potential tourism circuits identified in Mozambique that include the GLTFCA within the Strategic Plan for the Development of Tourism in Mozambique include the “Great Limpopo ‘bush-beach’” Circuit and the “Limpopo Route”. Descriptions of these routes can be found in Table 8.

<b>Table 8: Tourism circuits in Mozambique that include the Great Limpopo Transfrontier Conservation Area</b>	
Great Limpopo ‘bush-beach’ Circuit	(Johannesburg) – Nelspruit – Kruger National Park (SA) – Limpopo National Park – (Pafuri – Gonarezhou National Park (Zim) – Mapai) – Banhine National Park – Zinave National Park – Vilankulos – Bazaruto – Inhambane – Xai-Xai – Bilene – Maputo  An exciting route bringing together eco-tourism, culture and coast. Capitalizes on existing flows into KNP. To many international visitors this will represent a ‘dream holiday’ connecting the world’s largest game park with the pristine beaches and tropical islands of Mozambique. Departure in RSA (Johannesburg or Nelspruit) or follow in reverse order with start in Maputo.
Limpopo Route	Maputo – Bilene – Chokwe – Massingir – Limpopo National Park – Kruger National Park (RSA) – Malelane – Komatipoort (SA)- Ressaño Garcia – Maputo  An eco-tourism focused consolidated version of the Great Limpopo Bush-Beach Route. This route enables a relatively quick inclusion of Mozambique in regional tourism and provides visitors, after a taste of beach, with direct access into the Great Limpopo Transfrontier Park. Stipulates being a circular route with start and end in Maputo.
<i>Source: Ministério do Turismo, 2004</i>	

### 3.3.2 Banine and Zinave

There is no tourism infrastructure inside Banine or Zinave, and the two parks are closed for tourism.

Zinave NP covers approximately 3 700 km<sup>2</sup>, while Banhine is half the size of KNP (Anon, undated b; Warburton-Lee, 1999). Despite the loss of game due to a tripanosomiasis eradication program in 1969, international tourists visited Zinave until 1975. The civil war led to severe reductions in game, and the extinction of most large mammal species. The area has a dispersed but established population of approximately 6000 people, and some of the settlements predate the proclamation of the National Park. The economic activities of the communities revolve around subsistence agriculture with small-scale livestock (Anon, undated b).

The World Bank’s pilot TFCA project between 1997 and 2003 made some improvements to Banine and Zinave, namely (Webster, 2004):

- established administration and law enforcement;
- development of conceptual plans, which advocated formation of consortiums – comprising government, private sector and communities that could have been responsible for the development and management of the protected areas;
- reconnaissance surveys, which provided an overview of the landscapes and relic wildlife
- construction of some traditional staff houses;
- development of plans for rehabilitation of staff houses and offices;
- procurement and installation of water pumps;
- opening of roads, and clearing some parts of protected areas’ boundaries;
- installation of communication radios;
- provision of transport for management work;
- introduction of early burning policy;

- training of game guards; and
- monitoring wildlife recovery.

However, constraints to the process included flooding, vehicle break downs, poor and lack of infrastructure, poor roads and remoteness of the area, a lack of the Ministry of Agriculture and Rural Development's (DNFFB) support and approval of the conceptual plans which are now obsolete and inadequate funds allocated by the World Bank for rehabilitation of staff houses and office accommodation (Webster, 2004).

USAID is expected to fund the implementation of the recently finalized management plan for Banhine National with possible investments in the support zone of this park. One of the long-term objectives will be to consolidate the support zones of the two protected areas (Schuerholz, 2003).

Efforts by stakeholders involved in the transboundary process are currently focussed on the core GLTP rather than the wider GLTFCA, which is perhaps why there has been relatively little emphasis on tourism development in Zinave and Banhine to date.

### **3.3.3 Concession sites**

To the south of LNP are a series of concession sites that have been awarded to the private sector by the DNFFB. The concessions are Gaza Game Reserve, Balule Game Reserve, Du Ponto and Obese Game Reserve, Sabie Game Park, Coromane Dam, Ingwe Game Park and World Investments (see Figure 6).

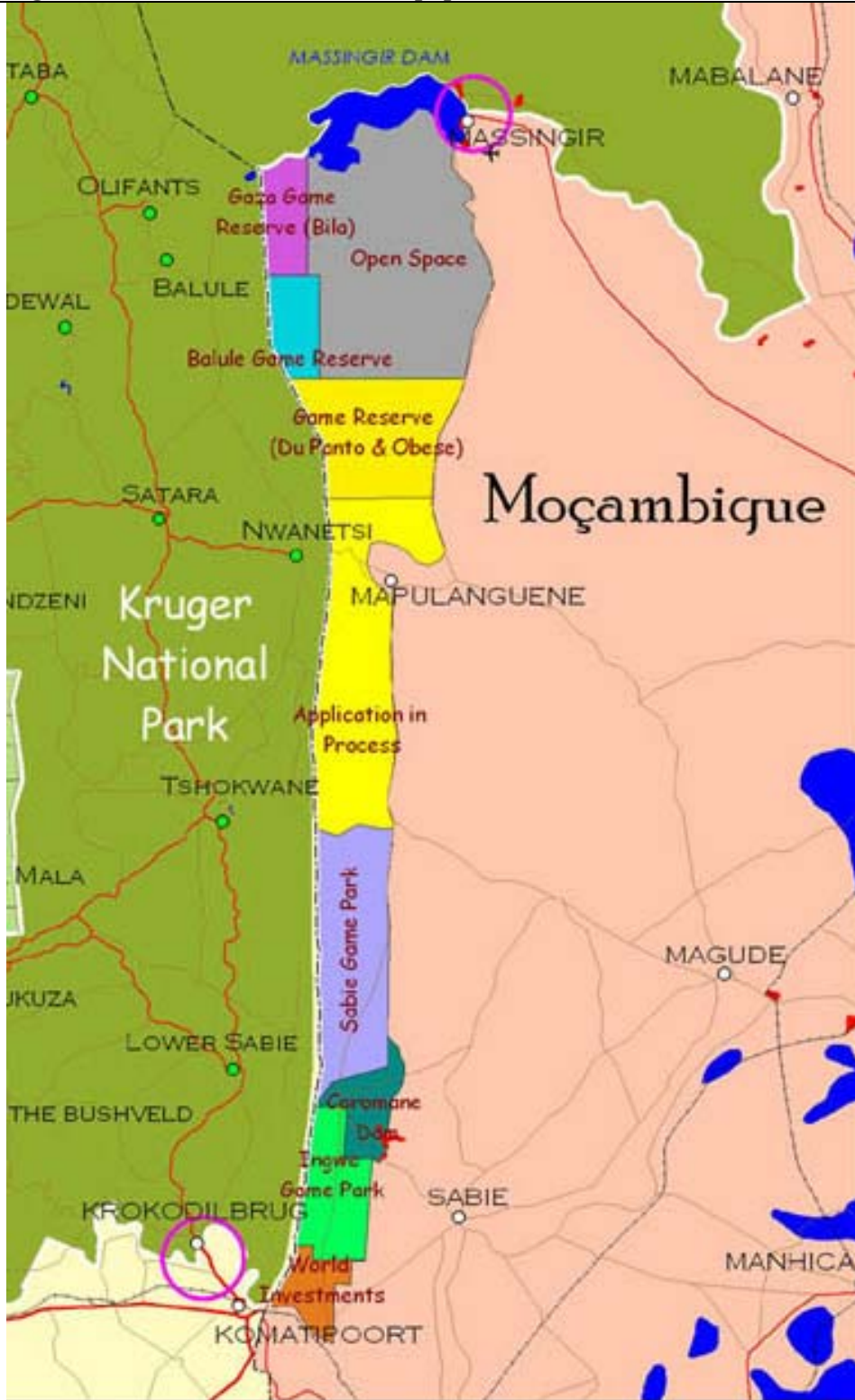
Very little information was available on the concessions, and it was not possible to contact any of the concessionaires directly, but the sites appear to have great prospective value given their potential to be included in the GLTFCA once fences are dropped with KNP. For example, 40 000 hectare Sabie Game Park was valued in 2001 at US\$18 million, but it was predicted that it would be worth US\$36 m once wildlife, infrastructure and fences were installed (Bourn, 2001). It was reported that tourism had not yet been developed there, and that this would be unlikely until wildlife was present (Pers. com. C. Faria, 2004).

A representative of the private sector in Mozambique indicated that the concession sites had been poorly planned, and should have been stretched further into Mozambique rather than north-south along the South Africa border, to allow more options for investors interested in the GLTFCA. The spatial characteristics of the prime sites along the border with KNP had effectively reduced further options for future investors further west.

### **3.3.4 Interstitial areas**

The only tangible evidence of a tourism development in the GLTFCA is a community-based tourism enterprises near the Massingir dam, that has been facilitated by the Swiss NGO Helvetas. Covane Community Lodge is located about 7 km from Massingir Township, and opened in May 2004. The lodge has two 5-bed chalets, three 3-bed tents (19 beds in total), and additional space for people to bring their own tents. In addition to accommodation, the lodge offers traditional dances, traditional food, hiking trails, village visits and boat viewing, in addition to the opportunity to purchase local crafts (Anon, undated c). There are self-catering facilities, a restaurant, ablutions and a seating area overlooking the Massingir dam. Between July and September 2004 the lodge had 95 domestic and foreign visitors (Pers. com. G. Palane, 2004).

**Figure 6: Concessions south of Limpopo National Park**



Source: Excerpt from Peace Parks Foundation map gl\_nsect\_a1\_v2

The inhabitants of Canhane reportedly had two economic opportunities open to them prior to the lodge: small scale commercial fishing at the Massingir dam, and employment in South African

mines. The lodge was envisaged as an enterprise that would facilitate economic activities and secure land tenure for the community (Helvetas Moçambique, 2002).

The Lodge was financed jointly by USAID (\$50,000) and Helvetas (\$20,000) in 2002 but is owned by the Canhane community. After presenting the concept of a community lodge to the Provincial Ministries of Tourism and Agriculture, to the district level administration, and departments of agriculture and tourism, the concept was raised with the Canhane and Kubo communities. There was a low level of awareness of tourism at the time, but Helvetas talked to the communities about CBT, potential locations for a lodge, the land law and land delimitation. The community identified a suitable location and at the suggestion of Helvetas, organised a steering committee of ten local volunteers. Community members chose members of the steering committee. The chief initially suggested ten candidates, and members of the community were asked to state whether they wanted those individuals to work on the lodge or not, during a community meeting<sup>4</sup> (Pers. com. G. Palane, 2004).

Helvetas facilitated the delimitation of an area of 7 024 hectares so that the community 'owned' the land the lodge was to be built on. The community chose local 20 people to work on the construction between February 2003 and November 2003, without assistance from the private sector. Helvetas organised a constitution for the association (Pers. com. G. Palane, 2004), which addresses the financial responsibilities of the Canhane community and Helvetas (Helvetas Moçambique, 2004).

Nine members of the community are employed at Covane lodge. Helvetas suggested the type of qualifications that employees would need, and the community searched for these qualifications within the community. Helvetas sent these people on tourism and hospitality training courses, and the manager is about to attend a hotel management course. The NGO also organised visits for community members to see community based tourism enterprises in Swaziland and at Xai-Xai (Pers. com. G. Palane, 2004).

In addition to helping the community to obtain their tourism license, Helvetas has agreed to work with them for three years from 2004. At the end of this period they intend to leave if the community are competent in running the camp, or alternatively help them to contract a private operator to assist them. Helvetas currently market the lodge on the community's behalf, buy advertising in local papers, have placed their number in the telephone directory and a Mozambique tourist guide, and promote Covane through tourism agencies. A website is also being planned. Financial management is also undertaken by Helvetas, including payment of salaries (Pers. com. G. Palane, 2004).

The lodge accrued 8 million Metacais (~R260,000) from the accommodation and services sold to tourists between May and October 2004, and plan to have a community meeting to decide how to spend the money within the 1033 strong population of Canhane. The agreement currently states that 50% of money should be spent on community infrastructure, and 50% on investment for the camp. This later proportion will eventually be spent on salaries when Helvetas leaves (Pers. com. G. Palane, 2004).

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<sup>4</sup> Two of the nominated people were reportedly de-selected as the community members indicated that they drank too much.

## 4. DRIVERS AND CONSTRAINTS TO TOURISM INVESTMENT

Drivers and constraints to tourism investment are initially reviewed in relation issues affecting the whole GLTFCA, and subsequently in relation to each participating country.

### 4.1 Great Limpopo Transfrontier Conservation Area

#### 4.1.1 Drivers

Underlying the TFCA process is the SADC Wildlife Policy. This promotes the establishment of TFCAs as a means for interstate cooperation in the management and sustainable use of ecosystems that transcend national boundaries. In addition, the SADC Protocol on Wildlife Conservation and Law Enforcement promotes regional cooperation in the development of a common framework for the conservation of natural resources, enforcement of laws governing these resources and their sustainable use, provides the framework for transfrontier development and management (Mtisi and Chaumba, 2001).

Although a memorandum of understanding to develop the Great Limpopo TFCA was signed by government ministers in October 1999 (Codex dds, 2001), it was actually an area of around a third of the size (35,000 km<sup>2</sup>), the Great Limpopo Transfrontier Park (GLTP), that was proclaimed three years later in December 2002 (Spenceley, 2003b). Therefore the majority of stakeholder effort and investment has been concentrated within this core area, which mostly consists of National Parks: Kruger, Gonarezhou and Limpopo.

The institutional structure of stakeholders working on the GLTP has a hierarchical arrangement that incorporates a Trilateral Ministerial Committee (TMC), a Joint Management Board (JMB), a coordinating party, and management committees. The TMC consists of the Ministers designated and mandated by the participating countries and is responsible for overall policy guidance in the development of the transfrontier park. The committee is chaired on a rotational basis and meets at least annually (Codex, 2001-2004). The GLTP Co-ordinating country changes every second year (Schuerholz, 2003). The JMB includes senior representatives of the competent authorities of each country. The four representatives of each member country are seconded from the public sectors of Planning and Finance, Security/Home Affairs, provincial/regional authority and the national agency responsible for protected area management (Schuerholz, 2003). The board is responsible for interpreting the political directives of the TMC into a set of operational guidelines and policies. It is also in charge of approving development and management plans, harmonising the expectations of the various parties with respect to the transfrontier park; and monitoring the implementation process of the establishment, development and management of the transfrontier park. As with the TMC, the JMB is chaired on a rotational basis and meets bi-annually (Codex, 2001-2004).

The JMB is supported by four management committees, which advise and assist in the implementation and day-to-day management of the GLTP. They are composed of representatives appointed by the competent authorities of the participating countries and/or representatives delegated by the relevant Ministries (Codex, 2001-2004). The management committees address legislation, finance and human resources, conservation, tourism; and safety and security (Schuerholz, 2003). They are responsible for implementation of the JMB's action plan and need to ensure full participation by all appropriate stakeholders when preparing policy recommendations and resource management plans (Codex, 2001-2004).

The Great Limpopo Transfrontier Park Joint Management Plan (JMP) encourages the park to work closely with the tourism industry within a framework of sustainable tourism. The plan aims for a market related strategic plan and the harmonisation of tourism related regulations (e.g. entry fees, speed limits) and border access for certain activities (e.g. guided walking, canoe, horse, camel or

elephant back trails and balloon safaris). The JMP also specifies that activities should be transparently outsourced to the private sector, and also that an element of preference should be given to local entrepreneurs. The plan states that local people should not only be perceived as potential employees, but should also have equity and businesses and the capacity to tender for contracts (JMB, 2002).

With respect to local communities, the JMP recommends that local people should be (JMB, 2002: 101-103):

- able to participate in development planning and policymaking, and management;
- made aware of the realistic impacts of the transboundary area;
- allowed to harvest sustainable levels of natural resources,
- given preferential access to employment opportunities for the development and management;
- considered regarding skills training (e.g. guiding) and entrepreneurial development opportunities;
- helped to negotiate equitable agreements for joint-ventures with the private sector;
- provided with preferential access, especially with reduced rates for schools and free access for cultural or traditional reasons; and
- marketed for cultural tourism.

#### 4.1.2 Constraints

Major constraints facing the TFCA at a strategic level include animal health, consultation and socio-economic issues.

##### 4.1.2.1 Animal health in the TFCA

Dropping fences between KNP and LNP will allow wildlife to migrate across the international border, and to re-establish historical ecological processes: a major objective of the TFCA. However, it is suggested that this activity will have to be associated with constructing a fence around the LNP, in order to prevent wildlife disease transmission to livestock, prevent poaching, and restrict illegal human movement (JMB, 2002). Table 9 illustrates the range of wildlife and livestock diseases in relation to the GLTFCA.

Disease	Carriers/ susceptible	Mozambique	South Africa	Zimbabwe
Foot and mouth (virus)	C = buffalo, <i>cattle</i> S = impala, kudu, warthog, eland, wildebeest, <i>sheep, pigs, cattle</i>	+++	1991	++
Malignant catarrh (virus)	C = wildebeest, <i>sheep</i> S = <i>cattle, sheep</i>	N/I	N/I	N/I
Rinderpest (virus)	C = <i>cattle</i> S = buffalo, impala, kudu, warthog, eland, wildebeest, <i>sheep, pigs</i>	1896	1904	1898
African Swine Fever (Virus)	C = warthog S = <i>pigs</i>	N/I	N/I	N/I
Heartwater (Rickettsia)	C = buffalo, eland, wildebeest S = <i>cattle, sheep</i>	N/I	N/I	N/I
Trypanosomiasis (protozoa)	C = buffalo, kudu, warthog S = <i>cattle, sheep, pigs</i>	++	1952	+
Theileriosis (protozoa)	C = buffalo S = <i>cattle</i>	+	+	+

Source: adapted from Griffin, 1999

Mozambique's policy is generally to vaccinate cattle against diseases such as foot and mouth, and only uses fencing in critical disease out-break situations and may be associated with human conflict (Metcalf, 2003). Similarly, fencing of narrow Sengwe Corridor to provide connectivity to Kruger seems unnecessary as the narrow strip involved appears more symbolic than real: a tourist rather than a wildlife corridor (CESVI, 2002; DNPWLM & AWF, 2002).

The Animal Health for the Environment and Development (AHEAD) initiative was launched at the World Parks Congress in 2003, and aims to consider policy and protocols for animal health on a wide geographical scale. Historically there has been a lack of interdisciplinary research on cross border disease, and effective veterinary control measures have previously dealt with relatively small areas within national borders rather than in larger landscapes (Cumming, 2004). Therefore, there is a lack of information on how conventional veterinary interventions will work in larger landscapes, and the risks of allowing populations of diseased and disease free wildlife and livestock intermingle over such a wide area. The impact of mixing populations on a large scale, where they may carry different variants of diseases, is not known.

#### **4.1.2.2 Consultation and socio-economic issues**

During the development of the GLTP communities were initially encouraged to form a transboundary-working group. However, when the lack of consultative processes in Mozambique became an issue the authorities on the GLTP Steering Committee agreed that community issues were national competency issues, not subject to a joint transboundary mandate. At the few meetings between communities that did take place there was an apparent difference in how far governments took communities into their confidence. While accepting that politicians and technical parties should meet in transboundary forums it is essential that they fully consult, in country, with civil society (Metcalf, 2003). An extract from an evocative newspaper article from 2002 below illustrates the lack of consultation at a community level (see Box 1), and describes the situation where the first herd of elephants was translocated into Mozambique before appropriate consultation had been undertaken with the people living there.

#### **Box 1: Excerpt from 'Mega park threatened'**

Dismissing advice that the project would take five to 10 years to get off the ground, [Vali] Moosa [*then minister for Environmental Affairs and Tourism in South Africa*] promised an "instant Kruger" in Mozambique by slashing delivery timetables in half, pledging to drop 120 km of the Kruger Park's fence by June this year [2002] and insisting that at least 1 000 elephants be herded into Mozambique to kickstart the venture. Moosa forgot to warn the estimated 30 000 Mozambican villagers living in the proposed superpark. The first they heard about "Africa's miracle" was when the inaugural herd of 30 elephant arrived on their doorsteps last October. Two bulls immediately smashed their way back into Kruger, and have since been followed by a steady trickle of jumbos, with a mass breakout by six females last week. *"Enormous political pressure was exerted. The process itself went very smoothly over three years, but began unravelling towards the end of last year,"* says former South African National Parks international coordinator for the Limpopo Park, Dr Leo Braack. The Mozambican villagers complain that neither government nor park officials consulted them. Village leaders, who met park officials, foreign donors and government leaders in Maputo this week, warned they would rather wage war against wild animals than vacate their ancestral land. *"The elephant release was symbolic and politically important ... but inadequate community consultation remains an overriding concern. South Africa's classical conservation know-how is excellent, but its record on community consultation must be improved,"* said German Development Bank (KfW) chief for Southern Africa, Kurt Hildebrand. Speaking from Germany, Hildebrand warned any attempt to steamroll communities would force funders to reconsider their position.

Source: Arnstein, 2002

Metcalfe (2003) suggests doubts as to whether the GLTP will provide benefits that will substantially contribute to alleviating poverty in rural areas. He reports that current development and management plans do not address how to incorporate or empower local communities, build their assets and their capacity to capitalise on the predicted tourism development opportunities. In addition, high illiteracy levels preclude most local communities from high profile and well-earning jobs and therefore the majority of people would probably only be employed as labourers. Metcalfe (2003) also reflects that benefits from permitted natural resource use and out-sourcing tourism services to local communities are not compelling, and few institutions exist in the area to support communities to engage in these businesses.

Specifically, potential socio-economic benefits for communities are vulnerable because various lessons from rural development have been neglected (Metcalfe, 2003: 12-13):

- popular participation of all parties to a development process should occur so that all interests are articulated and ensure that interest groups can identify with the proposed outcome and share in its realization (Muller-Glodde, 1991);
- lack of attention to building and maintaining the institutional capacities of the local communities who reside in the GLTP (Krishna *et al*, 1997);
- ignoring the importance of property rights to land and natural resources that help people form the expectations, which they can reasonably hold in their dealings with others (FAO, 1992); and
- threatening communities immediate livelihood needs (i.e. secure access to land and pasture) while promising an insecure benefit based on an alien land use (i.e tourism).

The Makuleke, with their Contractual National Park in the north of KNP, state that they are supporters of the Great Limpopo TFCA but want to be more involved in the implementation that we have been in the planning (Makuleke, 2003).

## 4.2 South Africa

### 4.2.1 Drivers

Drivers of tourism investment in the South African portion of the TFCA include government, conservation agencies, and NGOs.

#### 4.2.1.1 Government

The overarching vision of South Africa's Department of Environmental Affairs and Tourism (DEAT) is to ensure a better life for all South Africans through the growth of tourism and the sound management and protection of the country's environment. One of the main programs of the Department is to develop TFCAs as a mechanism for both conservation and economic development in the region, and to that effect DEAT has a directorate responsible for TFCAs within the Biodiversity Conservation section of the department. The main functions of this department are to ensure the effective establishment of TFCA's and to coordinate the activities of all relevant government departments with implementation agencies, and also to ensure effective consolidation, establishment and management of protected areas (DEAT, 2004). DEAT effectively provides policy direction and guidance on the TFCA process from a South African perspective and represents the South African Government internationally (PPF, 2004a).

In 2001 DEAT allocated R87 000 to TFCAs, but this was due to rise to nearly R16 m in 2005/6, indicating an increasing emphasis on these initiatives (see Table 10). The GLTFCA is one of 6 TFCAs proposed that South Africa proposes participate in (DEAT, 2002).

<i>R '000s</i>	<b>2002/03</b>	<b>2003/04</b>	<b>2004/05</b>	<b>2005/06</b>
TFCAs	2 766	6 893	9 988	15 988
Source: DEAT, 2002				

The national Department of Trade and Industry (DTI) will promote investment in the TFCA once appropriate project identification has taken place through specific tourism plans (Pers. com. K. Rivett-Carnac, 2004).

Provincial Investment Promotion Agencies (PIPAs) relevant to the GLTFCA are located in Mpumalanga (Mpumalanga Trade and Investment Initiative) and Limpopo (Trade and Investment Limpopo) provinces. PIPAs are responsible for identifying projects for investment. The DTI coordinates monthly meetings with the PIPAs to align their investment strategy and approach. Although there is an investment handbook which advises how to identify and implement sustainable investments with respect to identifying, scoping, assessing and packaging investment opportunity. Currently there is no detail on responsible tourism investment currently – although it is aligned to government policy (Pers. com. K. Rivett-Carnac, 2004).

The Mpumalanga Department Of Finance & Economic Affairs has a tourism budget of approximately R1.8 million. The Department also has access to the National Department's Poverty Relief Fund. In the current financial year the Department obtained R22 m poverty relief funding. It is estimated that approximately R 40 m is annually spent by government and NGOs on tourism in Mpumalanga. Ehlanzeni District Municipality budgeted approximately R750 000 on the 2001/2002 budget for tourism development (Ehlanzeni District, 2003).

#### **4.2.1.2 Conservation agencies**

SANParks is responsible for the implementation of the following transfrontier parks and transfrontier conservation areas (SANParks, 2004). Their budget from DEAT in the 2002-3 financial year was R40 m, which was spent on infrastructure development (see section 3.1.2).

#### **4.2.1.3 NGOs**

The Peace Parks Foundation (PPF) was founded by the WWF South Africa in 1997 with funding from the Rupert Nature Foundation, in order to facilitate the creation of TFCAs in southern Africa (Hanks, 1998b). The non-profit organisation's objective is, '*. . . to fund and facilitate the development of TFCAs, placing particular emphasis on the promotion of regional peace and stability, the creation of new jobs associated with the anticipated growth of tourism in southern Africa, and the conservation of biological diversity*' (Hanks, 1998b: 2). It has acted as a catalyst to a number of initiatives, but still has to gain acceptance in some quarters to gain its full potential (Griffin, 1999). PPF primarily facilitates the establishment and development of transfrontier conservation areas and does not get involved in the management of these areas. To facilitate the concrete establishment of TFCAs, PPF, assisted by a number of donors, funds the posts of co-ordinators for transboundary areas, as approved by the various governments involved (Codex dds, 2001-2004). PPF has been involved in the TFCA since 1990, when Anton Rupert, then president of WWF South Africa and founder of the PPF met with Mozambique's President Joaquim Chissano, to discuss the possibility of establishing a permanent link between some of the protected areas in southern Mozambique and their adjacent counterparts in South Africa, Swaziland and Zimbabwe (PPF, 2004b).

During SANParks concessioning process, the African Wildlife Foundation (AWF) acted as an adviser and liaison between Imbali Safari Lodge and the local community to develop ways for the community to support the needs of the lodge. It is reported that the community now provides a

range of business services to the lodge including security, transportation, sales of crafts, laundry services and also supplies fresh produce (AWF, 2004a).

#### **4.2.2 Constraints**

No fundamental constraints to tourism investment in the South African section of the TFCA were identified.

### **4.3 Zimbabwe**

#### **4.3.1 Drivers**

Key drivers for tourism in the Zimbabwean portion of the TFCA include conservancies, donor agencies and NGOs.

##### **The Malilangwe Trust**

The Malilangwe Trust is a Zimbabwean non-profit organisation, dedicated to wildlife and environmental conservation and rural development. The Trust's activities are focussed on the Malilangwe Estate, a property located in Chiredzi district. In addition to employing 316 people (de la Harpe, 2004), the Malilangwe Trust has a Neighbour Outreach Program for the Chiredzi area. Some of the Program's initiatives will have a beneficial impact on the TFCA. These include (de la Harpe, 2004; 2003; 2002; 2001):

- the provision of food aid to local people;
- financial assistance to the running of Gonarezhou NP (e.g. \$4m in 2003, \$1 in 2002, \$0.5m in 2001, \$0.9m in 2000);
- support for the TFCA development process;
- promotion of sustainable natural resource use;
- electrification of local schools;
- support small enterprise development through training;
- provision of local bursaries, training workshops and environmental education; and
- financing a local clinic and school classrooms.

The Malilangwe Trust has helped facilitate TFCA meetings and to strengthen institutional structures. In 2002 the Malilangwe Trust hosted and facilitated a two-day workshop to develop a District strategic plan for implementation of the Great Limpopo Transfrontier Conservation Area. The workshop led to the constitution of a District Steering Committee for the TFCA. The Trust then hosted and facilitated two meetings of this Steering Committee (de la Harpe, 2003). In 2004 de la Harpe reported that Chiredzi district had been progressive and pro-active in the process, with the assistance of Malilangwe. Malilangwe had dedicated considerable resources to the development process by financing and facilitating three meetings during 2003 of the district Steering Committee for the TFCA. They also assisted two neighbouring districts of Beitbridge and Mwenzezi to create similar structures. In 2003 the Chiredzi district focused on creating awareness among local and traditional leadership structures of the TFCA and what it means for the people of the district. Several awareness meetings for local and traditional leadership structures were held, with Malilangwe's assistance and they financed the development of a district brochure on the TFCA (de la Harpe, 2004).

## **Save Valley Conservancy**

The Save Valley Conservancy is an amalgamation of 25 private ranches into one consortium, which covers 5 rural district councils, namely Buhera, Bikita, Chipinge, Chiredzi and Zaka. The Conservancy ensures individual ownership of land, management of the ranch and financial benefits accruing from the ranch. However, they share responsibilities for restocking of wildlife and ecological management of the Conservancy (Mtisi and Chaumba, 2001).

Mtisi and Chaumba (2001) indicate that the relationship between Save Valley Conservancy and the communities that surround the Conservancy in the 5 rural district councils has been marked by conflict, tension and hostility that originated in the colonial period. They report that locals were forcibly removed from their land to give way for individual ranches, which later became the Conservancy. The land where the local people once hunted game both for food and ritual, became individualized and privatized, and illegal. Mtisi and Chaumba (2001) note that relationships between local people and individual ranches in the conservancy vary considerably – between animosity and cordial relations – with regard to their history and their interactions with the landowners.

For example, the Mahenye ward has had a solid relationship with Clive Stockhil (Chair and orchestrator of the Save Valley Conservancy) since 1982. Initially drawn into a process as translator between the Mahenye leadership and the Gonarezhou warden, he initiated a process that ultimately led to the Mahenye ward being devolved ownership over wildlife on their land, in return for reducing poaching in the national park. Under agreement with the ward, Stockhil obtained the hunting concession for the ward and coordinated elephant trophy hunts within the quota awarded by the Department of National Parks and Wild Life Management (DNPWLM). Between 1992 and 1996 between Z\$138,000 and Z\$180,000 was generated annually from safari hunting in the ward. A subsequent agreement between Stockhill and Zimbabwe Sun involved the development of a lodge on his ranch in the Save Valley Conservancy, and also the two tourist lodges in the ward: Mahenye and Chilo Lodge, which opened in 1996. The agreement stipulates and increasing annual percentage of gross revenue of between 8% and 12% is paid to the Chipinge Rural District Council (RDC), with a minimum annual payment of Z\$220,000, and that people from Mahenye ward are preferentially employed at the lodges (Murphree, 2001). The relationship between the Mahenye ward has evolved and strengthened over time, and dealt with difficult circumstances and conflicts during the course of this time.

The Save Valley Conservancy Trust was formed to promote a close and trusting relationship with local communities, and to make financial contributions to community development in the five districts. The Trust also aims to improve the managerial and entrepreneurial capacity of communities at household, village and ward levels, and to develop formal institutional frameworks for sound legal and administrative bases for joint venture initiatives with the Conservancy and external agencies. The Trust includes representatives of the 5 RDCs and the Save Conservancy, and on average each district council gets \$100 000 per year to use towards a prioritised community project (Mtisi and Chaumba, 2001).

## **CESVI**

CESVI, the Italian development agency, has been assisting community members in the Sengwe Communal Lands (SCL) in discussions and participation in the GLTFCA. This has included initiating communications with Chief Sengwe, ward councillors and community representatives in 1999; organising exchange visits to the Makuleke Common Property Association and facilitating the development of the Sengwe/Chikwarakwara TFCA committee in 2000, and developing a concept paper for the development of the Sengwe Corridor in 2002. CESVI has also undertaken

resource inventories and GIS mapping in Sengwe, Chipise and Dite 2 wards to develop a landscape classification for the area, household survey and socio-economic surveys (CESVI, 2002).

## **CAMPFIRE**

Communal Areas Management Programme for Indigenous Resources (CAMPFIRE) seeks to create conditions for institutional change in the management of wildlife, habitats and other natural resources through the use of economic incentives (Bond, 2001). CAMPFIRE hunting makes a relatively important economic contribution to the Sengwe and Chipise Wards, and is based on hunting. The revenues are used for infrastructure development and household dividends (CESVI, 2002).

## **African Wildlife Foundation**

The African Wildlife Foundation (AWF) is an NGO working to ensure the wildlife and wild lands of Africa will endure forever (AWF, 2004b). This NGO facilitated Tri-Nation Working community working groups in 2001 at Malilangwe (CESVI, 2002).

### **4.3.2 Constraints**

#### **4.3.2.1 Political climate and land reform**

In the run up to the 2000 general election, various coalitions of actors, gathered under the banner of 'war veterans', stepped up a previously low-level campaign of occupying commercial farms and some state-owned land. ZANU(PF), the ruling party, fought the election under the slogan 'Land is the economy and the economy is land' (Wolmer, 2003). In February 2000, a national referendum was held regarding a draft new Constitution for Zimbabwe, and was followed in June by a nationwide parliamentary election. These two processes dramatically changed the country's political environment. Unfortunately, the changes were traumatic and reported as such, resulting in a poor international image for Zimbabwe, which had adverse implications for the whole economy, most particularly the tourism industry (de la Harpe, 2001). Farm occupations and a 'fast-track' land reform process picked up momentum after the election, underpinned by a policy emphasis on the importance of small-scale peasant agriculture at the expense of white-dominated commercial agriculture in general, and the wildlife industry in particular (Wolmer, 2003).

During 2000 and 2001 Chaumba *et al* (2003a) recorded a massive escalation of farm designation and resettlement with a view eventually to redistributing 9.2 million ha from the commercial farming sector (or approximately 80% of agricultural land) to 160,000 poor beneficiaries and 51,000 small to medium-scale indigenous (black) commercial farmers. By January 2002, official records indicated that 7.3 million ha on 3,074 farms had been allocated by the Ministry of Land, Agriculture and Rural Resettlement, and that 114,830 households had been resettled on 4.37 million ha.

Gonarezhou was declared a National Park in 1975. Local Shangaan people were forced to resettle outside the park's boundaries at this time, and according to Ferreira (2004) were some of the people re-occupying the park during 2000. In May 2000 occupations began in Gonarezhou as the Chitsa people used the invasion of commercial farms to pursue their historical claim for land that they had been forcibly removed from; driven by the need for access to grazing and hunting (Chamuba *et al*, 2003b). By November 2000 areas of the park were being occupied, cleared and burned by residents of neighbouring communities (Sharman, 2001). Similarly, areas of the Save Valley Conservancy and the Chiredzi River Conservancy had also been invaded by 'squatters'. In 2000 it was reported

that poaching and snaring had led to the loss of more than 3000 animals, while 40% of Chiredzi had been destroyed by burning (Sharman, 2000). Settlers were able to proceed despite opposition from the Department of National Parks and Wildlife Management and the Minister of Environment and Tourism (Chamuba *et al*, 2003b). Invasions on a portion of the Malilangwe Estate in 2000 led to the cancellation of the few tourism bookings that were held for the year. In fact, although Malilangwe had held reservations of \$1m at the start of 2000 – all of these were cancelled when the political violence broke out. Total revenues generated were just over US\$150 000, or approximately 10% of what Malilangwe had anticipated (de la Harpe, 2001).

By May 2001 Agritex, Agricultural and Rural Extension Department, had planned 10 villages in Gonarezhou and had allocated separate arable plots and a communal grazing area. Provisions were made for 750 settlers on 520 plots covering 11,000 ha. Although there was an immediate increase in settlers and bush clearing, a combination of drought and elephant crop raiding led to most settlers returning to communal areas by June 2002 (Chaumba *et al*, 2003b: 7).

Since November 2002 the Governor of Masvingo Province has reportedly encouraged families of previously evicted Shangaans and opportunistic ‘war veterans’ to take over 5,000 ha of the park, north and south of the Runde River. Cattle are grazed in the park and the cattle fence has been pulled down. Although the incursions have only taken place in some parts of Gonarezhou, the poaching and fall in tourist numbers caused by the instability have affected the Transfrontier Park (Ferreira, 2004). However, Wolmer *et al* (2003: 15) indicate that it is not only cattle and agriculture that are forming the mainstay of enterprise development in Gonarezhou. There appears to be a unique case of local entrepreneurs allocating themselves land in a former veterinary corridor (Section 27), with the objective of developing commercial wildlife tourism. Apparently 50-ha self-contained plots have been allocated to 56 people, who are members of a relatively wealthy and politically well-connected elite including, councilors, war veterans’ leaders, army personnel, policemen and National Parks staff. Although none of the people have physically moved back into the veterinary corridor, they propose to operate it as a mini-conservancy, where revenues from a safari concession would be disbursed to the 56 landowners (Wolmer *et al*, 2003).

De la Harpe (2004) reported that in 2003 inflation in Zimbabwe surpassed 700% per annum at one point, and many enterprises suffered from loss of business, incurring extensive job losses. The rampant inflation and shortages of basic and essential commodities, compounded by the near collapse of state health care systems, have escalated and made life difficult for all Zimbabweans (de la Harpe, 2004).

More positively, in January 2004 the government of Zimbabwe began to relocate illegal settlers out of Gonarezhou and its buffer zones, because of the proposed TFCA (Staff Reporter, 2004).

#### **4.3.2.2 Sengwe Communal Land**

CESVI report that the communities of Sengwe, Chipise and Dite 2 wards are strongly opposed to resettlement in order to create a wildlife corridor between Gonarezhou and KNP. Resettlement is particularly unfavourable given the current present political environment in Zimbabwe, where land redistribution is extending rather than reducing the area of communal land (CESVI, 2002). In 2001 there were almost 22,000 people living in the Sengwe area, with a population density of 8.1 people per square-kilometre. The majority of agricultural land area in the 1998-9 season was used for sorghum (5405 ha) followed by maize (1145 ha), mhunga (235 ha), cotton (195 ha), ground nuts (18 ha) and cowpeas (18 ha) (AGRITEX Office, Chiredzi, 2001)

If the Sengwe Corridor shown on maps of the GLTFP published by the Transfrontier Park Technical Committee and the Peace Parks Foundation was undertaken, stretching from the north-

western corner of KNP to the north-western corner of Malipati Safari Area, the resettlement of about 15,500 people would be required (see Figure 2). A process of negotiation with communities is taking place, and a more conservative area may be possible (CESVI, 2002) (see section 3.2.3).

#### **4.3.2.3 Access**

De la Harpe (2002) suggests one of the reasons why tourism has not taken off South-eastern Zimbabwe, aside from the political crisis, has been the lack of scheduled air services, which has rendered it difficult and expensive for tourists to reach the area. There is therefore a situation here, in that scheduled air services will not be instituted until there are the safari lodges attracting clients and thus creating a demand for the service. However, the lodges will not be developed, and the visitor demand created, until there are scheduled air services (de la Harpe, 2002). In 2000 local operators agreed to support a flight service for the Lowveld three or four times per week using a Let 410 19-seater aircraft. This service was to commence on 1 June 2000, but when tourism business collapsed following the farm invasions there was little purpose in initiating it. Therefore they have relied on a local charter operation instead (de la Harpe, 2001).

#### **4.3.2.4 Funding**

In general, Zimbabwe has struggled to make its contribution into the TFCA due to lack of funds (Staff Reporter, 2004). Withdrawals of donations for environmental causes in Zimbabwe have been one of the indications of international concern with the country (Zwecker, 2002), and these have affected the ability of the country to participate in the development of the TFCA (de la Harpe, 2004). The unstable political climate is hampering the operations of the tourist enterprises by making it difficult to market tourism to international markets, and difficult to secure donor funding (de la Harpe, 2004).

Gonarezhou is reportedly not realising its potential as the engine for growth in the region. Central government funding is inadequate and therefore the Park is under-managed. It is run down, wildlife populations are too low (except elephant, of which there are too many) and tourism infrastructure is almost non-existent. The park receives 5 000 visitors per annum, compared with 1 million per annum in Kruger and a further 1 million per annum in the private reserves on the western border of Kruger. In addition, the area is not known by the tourism trade, consumers, or as a tourism destination (de la Harpe, 2002).

However, in April 2004, the ZTA dismissed concerns by South African and Mozambican tourism ministries that Zimbabwe was failing to finance capital development projects in the Gonarezhou National Park towards the TFCA. The ZTA indicated that although Zimbabwe was not able to access international donor support due to selective sanctions from the World Bank and International Monetary Fund and other donors, that they would rely on its own resources and 'well wishers' to finance projects (Chikanga, 2004).

## **4.4 Mozambique**

### **4.4.1 Drivers**

Drivers of the GLTFCA in Mozambique include government agencies, intergovernmental organisations, donors and NGOs.

#### **4.4.1.1 Government**

There are currently three ministries responsible for tourism development in the GLTFCA:

- The Ministry of Agriculture and Rural Development (DNFFB) – responsible for forestry and wildlife outside parks;
- The Ministry for Environmental Affairs (MADER) – responsible for implementation of the Convention on Biological Diversity; and
- The Ministry of Tourism (MITUR) – responsible for tourism and conservation inside protected areas.

The Government Of Mozambique (GOM) has taken a series of actions to promote the tourism sector, including creating a separate Ministry of Tourism in 2001, and adopting a Tourism Policy and Implementation Strategy (2003) and by preparing a Strategic Plan for Tourism Development in Mozambique (2004-2008). The Strategic Plan states that the GLTP will help to anchor tourism development in the South (Ministério do Turismo, 2004). The plan recognises that it will take time for the park to be operational for photographic safaris but that opportunities already exist for places like Massingir to link with KNP and benefit from its brand and infrastructure. One of the opportunities identified is to develop ‘bush/beach’ linkages with the Inhambane/Gaza beaches.

These policies and plans recognize that Mozambique’s comparative advantage lies mainly in its varied and relatively pristine environment, together with its rich cultural heritage, as well as the potential to link with South Africa and other neighbouring countries with established tourism destinations and markets. They also identify tourism as a means to provide new sources of income in some of the poorest areas of the country, where agricultural potential is low, and particularly to attract investment to these areas. These factors among others have led the GOM to identify the five TFCAs as Priority Areas for Tourism Investment (PATIs), while with maintaining their biodiversity and ecological values (World Bank, 2004).

The Environmental and Social Framework for TFCAs in Mozambique (Norton and Loforte, 2004) sets out a framework for tourism development in transboundary areas. The framework provides a series of plans at the macro and micro level. In particular, it includes provision for overarching Integrated Development Plans for tourism in TFCAs in Mozambique and Strategic Environmental Assessments for each TFCA. At the project level, it requires Environmental Impact Assessments for each development coupled with Environmental Management Plans and Environmental Audits. With regard to social aspects, the framework calls for Cultural Resources Management Plans, Resource Action Plans and Resettlement Action Plans. Specific to tourism, the framework calls for TFCA Tourism Concessions, Integrated Tourism Destination Plan and Tourism Action Plans. The Concession process aims to entrench linkages and benefits to local communities.

### **Centro de Promoção de Investiments**

The Centro de Promoção de Investiments (CPI) is the Mozambican Investment Promotion Centre. The centre provides information to potential investors, and helps them to register companies, obtain licenses, gain work permits, land licenses and to find business partners. For tourism investment applications, the CPI coordinate between the Ministry of Tourism and the Ministry of Environment for approval, and then seek approval from the Ministry of Finance on the investor’s behalf (Pers. com M. Bila, 2004).

A private sector interviewee reported that there were still problems with the CPI process, in that although the organisation may authorise investments, developers still need to return to the Ministries to confirm agreements before developing.

#### 4.4.1.2 Intergovernmental organisations

The World Bank, through the Global Environment Facility (GEF) Trust Fund, financed a Transfrontier Conservation Areas Pilot and Institutional Strengthening project (TFCAPISP) between 1998 and 2003 for US\$ 5 million (World Bank, 2004) with the Government of Mozambique (Webster, 2004). The project aimed to stimulate private sector investment in underdeveloped areas by creating development nodes linked by transport corridors within the contexts of spatial development initiatives (SDI) within southern Africa. The project focused on launching the TFCA concept, creating an enabling policy and institutional environment (particularly at the national and regional level), and providing a learning opportunity for all the stakeholders and actors. Part of the project mandate was the establishment of the Limpopo TFCA through international agreements, policy and institutional development (i.e. the creation of a coordinating TFCA Unit within the Ministry of Tourism), and direct investments to strengthen the management of its core-protected areas (World Bank, 2004).

The first phase had four components costing \$7 m (Webster, 2004):

- Institutional and policy development (\$3.4 m, 49% of costs);
- Habitat and wildlife management (\$1.7 m, 24%);
- Community mobilization and pilot programs (\$1.6 m, 23%); and
- Monitoring and evaluation (\$0.3 m, 4%).

With regard to institutional and policy development, the pilot led to (Webster, 2004):

- a small TFCA unit, to help formulate policy, plans and give technical guidance to TFCAs;
- a GIS unit, created and trained within the DNFFB;
- provincial and local level capacity building, training, technical assistance and logistical support activities were provided;
- policy development, relating to wildlife, forestry, land and natural resources management laws were revised, hunting fees in hunting concessions were revised, tendering processes and project approval mechanisms were reviewed;
- a number of surveys, tender guidelines, guidelines for private sector engagement and action plans were developed through the project to improve the investment climate;
- an International Treaty and two Agreements were signed by the Heads of State of Mozambique, South Africa, Swaziland and Zimbabwe as a result of the project, committing each country to the TFCA concept; and
- stimulation for other donors to invest in the TFCAs, in particular, KfW, USAID and Ford Foundation.

With regard to habitat and wildlife management the pilot led to (Webster, 2004):

- the formal gazetting of LNP (2001) and creation of GLTFP;
- boundary demarcation of Banhine and Zinave NP;
- management plans for core protected areas (funded by other donors: USAID);
- the development of detailed management plans for Banhine and Zinave NP (KfW is financing management plan for LNP);
- development of land-use plan for communal area between protected areas (the “interstitial area”); and
- increased field presence and some minor infrastructure in LNP, Banhine and Zinhave, including surveys, water supplies, roads rehabilitation, radios, staff camp rehabilitation, training of guards and provision of transport vehicles.

A second phase of the project is proposed for a fifteen-year program financed by the Global Environment Facility (\$10.4 m), the International Development Association (\$20.6m), and the

GOM (\$3.4 m) (GEF, 2004), which among other activities, will address issues at the provincial district and local levels to ensure that the larger scale ecological systems and linkages are maintained (World Bank, 2004). The program aims to support biodiversity conservation and natural resource management in the TFCA, while demonstrating that sustainable tourism development can provide both economic alternatives to unsustainable use and development, and an incentive for protecting and managing biodiversity resources (GEF, 2004). In particular, this means strengthening policy, developing an Integrated Development Plan for the GLTFPs, promote and support development of sustainable tourism led by the private sector and communities, identification, monitoring and protection of the most significant and vulnerable biodiversity assets within the TFCA (World Bank, 2004). The project will develop draft objectives for the area and create opportunities for local communities to benefit from sustainable tourism (Pers. com. B. Soto, 2004).

The South East African Tourism Investment Program (SEATIP) has been funded by Netherlands Trust Fund (\$93,500) and the International Finance Corporation (IFC) Trust Fund (\$75,000) and began in September 2003. SEATIP aimed to provide a strategic, programmatic and collaborative approach to optimise tourism potential in the South East Africa region, initially concentrating on Mozambique. The program focused on the obstacles to establishing the enabling environment for private sector investment and accelerating the growth of a sustainable and responsible tourism industry. Assignments included organising appropriate forums for the existing private sector to discuss tourism issues with different levels of government, promote tourism investment; and examine and encourage private sector efforts to develop regional circuits (de Vletter *et al*, 2004).

#### **4.4.1.3 Donor agencies**

To date donor funding in Mozambique has originated from KfW, USAID, GEF through the World Bank, Netherlands National Postcode Lottery through WWF-Netherlands and PPF, with great interest by France for additional contributions and by Holland through WWF and Peace Parks Foundation (Schuerholz, 2003).

Prior to the proclamation of the LNP, the GoM entered into an agreement with the Government of Germany through the German Kreditanstalt für Wiederaufbau (KfW) in February 2001 to finance the establishment and development of the Park. KfW pledged a grant of €6 million to pay for the infrastructure development and equipment needs (Schuerholz, 2003).

#### **4.4.1.4 Non-governmental Organisations**

Several local and international NGOs play an important role in the development of the park. Most past NGO efforts have concentrated on community work and defending community interests in the establishment process of the LNP. In 2002 an NGO “Forum” was formed to act on behalf of the NGOs to make use of their synergies. Meanwhile the cooperation between the Forum and the PIU works to the advantage of the park and is seen as a great asset for future cooperation. This enables the NGOs to actively participate in the park development and decision making process for the benefit of the conservation objectives and local communities affected by the park (Schuerholz, 2003). The forum includes groups involved in very different activities, such as ORAM, FNB (the Endangered Wildlife Trust) Legion Association of Local development, IUCN, African Wildlife Foundation, Helvetas, with TFCA country representatives and District administrators (Pers. com. I. Nhantumbo, 2004).

The draft Business Plan for LNP indicates that the PPF had taken a lead role in the promotion and establishment of the LNP in particular. Before the official agreement with the GOM had been made on the KfW financing, the donor agency entered into an agreement with the South African based

PPF as a partner responsible for the implementation of the project. In addition, it is stated that KfW and PPF are actively pursuing cooperation with other bilateral and international donors for co-financing the sustainable support zone development and the voluntary re-settlement programme. After agreeing to work with KfW, PPF, in partnership with MITUR signed an agreement to oversee the implementation of the LNP (Schuerholz, 2003).

The IUCN-Mozambique implemented CBNRM work in some pilot areas in LNP and Banhine. They undertook social-economic surveys and facilitated land acquisition for local communities around Banhine NP (20 000 ha). In Zinave, the Endangered Wildlife Trust was implementing a small-scale CBNRM program. It identified community needs, and focused its program on bee-keeping, but very little was achieved with respect to income generation from this system. The Endangered Wildlife Trust also completed a process of acquisition of 10 000 ha of land for the local community of Zinave along the buffer zone (Webster, 2004).

Helvetas has been working in Mozambique since 1979, dealing initially with emergency relief and resettlement, and not moving towards the development of CBNRM initiatives (Anon, 1999). The organisation aims to contribute towards development of living conditions of disadvantaged people in poorer areas of Africa, Asia and Latin America. They promote integrated development, consciousness-raising among disadvantaged people, and fulfilment of basic needs using the principles of justice, self-reliance, partnership and self-help (Helvetas, 1997). Helvetas has facilitated the development of a community based tourism enterprise near Massingir (see section 3.3.4).

The African Wildlife Foundation (AWF) conducted an aerial survey of Banhine NP in October 2004. The NGO recently signed a memorandum of understanding with the Government of Mozambique to work with MITUR on restoring the park. Priority projects include the complete analysis of the aerial survey and the establishment of a scientific research centre. AWF and MITUR will also be working to engage the local communities, as well as the private sector, in the management of the park (AWF, 2004c).

#### **4.4.2 Constraints**

The World Bank states that (Christie, 2004: 3):

*“ . . . the principle constraints for tourism development in Mozambique are coordination among agencies involved in regulating tourism, unavailability of sufficient land with serviced infrastructure and consequent difficult communications; a lack of understanding of tourism’s potential outside tourism circles; the need for strategic thinking in the implementation of tourism policies, regulation and programs; and the need to improve quality by education and training”.*

The World Bank suggests that tourism could grow in an unbalanced way if regulation does not improve, and purports that the government is trying to adopt sound policies and use land to direct and encourage sustainable development. With regard to integrating tourism development with other sectors, the Bank states that the government should be more proactive in forging linkages between tourism, conservation and agriculture. The government should also encourage a business environment with clear "rules of the game", and address social issues such as the participation of local communities (Christie, 2004).

Specifically with regard to the GLTFCA, constraints identified in the ‘Transfrontier Conservation Areas Tourism Assessment’ for SADC (Blueprint Strategy & Policy, 2002), indicated that constraints included:

- security: customs, immigration and border control, to facilitate regional tourism flows;
- legislation to address a common tourism development framework and natural resource management;
- funding to support community tourism initiatives;
- appropriate and targeted marketing;
- infrastructure development of appropriate tourism facilities and road infrastructure linking the TFCAs with major access routes;
- opportunities for private sector involvement in identified tourism opportunities;
- the status of the Gaza Safaris hunting concession so that the investment opportunities in the region are not impeded; and
- debate on the sharing of benefits and resources should be fast tracked and resolved.

#### **4.4.2.1 Land law**

There was divided opinion among private sector consultees as to whether the land law affected tourism. Although one consultee did not believe it had an adverse effect, another stated that the process of obtaining land through the Ministries appeared to be a competition with unclear rules. One would apply for an area of land, and hope that the application was accepted, and that your request was first. There was a perception that this process was open to corruption.

The Land Law (19/97) is the primary legislation determining access to, and the allocation of, land in Mozambique. The main features of the revised Act include (Huggins *et al*, 2003):

- Confirmation of the principle that land belongs to the State (Article 3 of the law) and may not be sold or in any other way alienated, mortgaged or pawned;
- Limited recognition of the role of customary law, but attributing some management and conflict solving powers to local leaders; and
- The acceptance of a limited, although highly regulated, land market.

The law gives communities the right to delimit and register their land, including farms, fallow and reserve land. Once the land is registered, potential investors can negotiate with communities to utilise it. By 2002, about 100 communities had land delimitations approved, but there had not been any negotiations with investors. However, although delimitation gives communities power, the process can cause problems by raising expectations and sometimes disinterring old disputes. Despite the expensive and time-consuming process, it may be the only way to protect peasant rights (Hanlon, 2002).

The complexity of applying for land use rights and the difficulties in transfer, constrain the private sector in the following ways (ICC, 2003):

- complexity of land use attribution procedures increases uncertainty, time and cost to investors;
- lack of transparency in land concession system facilitates corruption, creates additional risk for investors;
- rights are not freely transferable, compromising investors' ability to finance investments;
- lack of a legal mechanism to consult local communities; and
- lack of transparency in the land use attribution rights for communities that may compromise the objectives of ensuring equitable benefits to the communities.

In order to overcome these constraints it has been suggested that a reliable market for land rights (leaseholds) could be developed through public auction, and that a transparent and efficient system for awarding land rights should be developed. Free transferability of land rights could be ensured to allow investors to use them as a guarantee against their loan repayments (ICC, 2003).

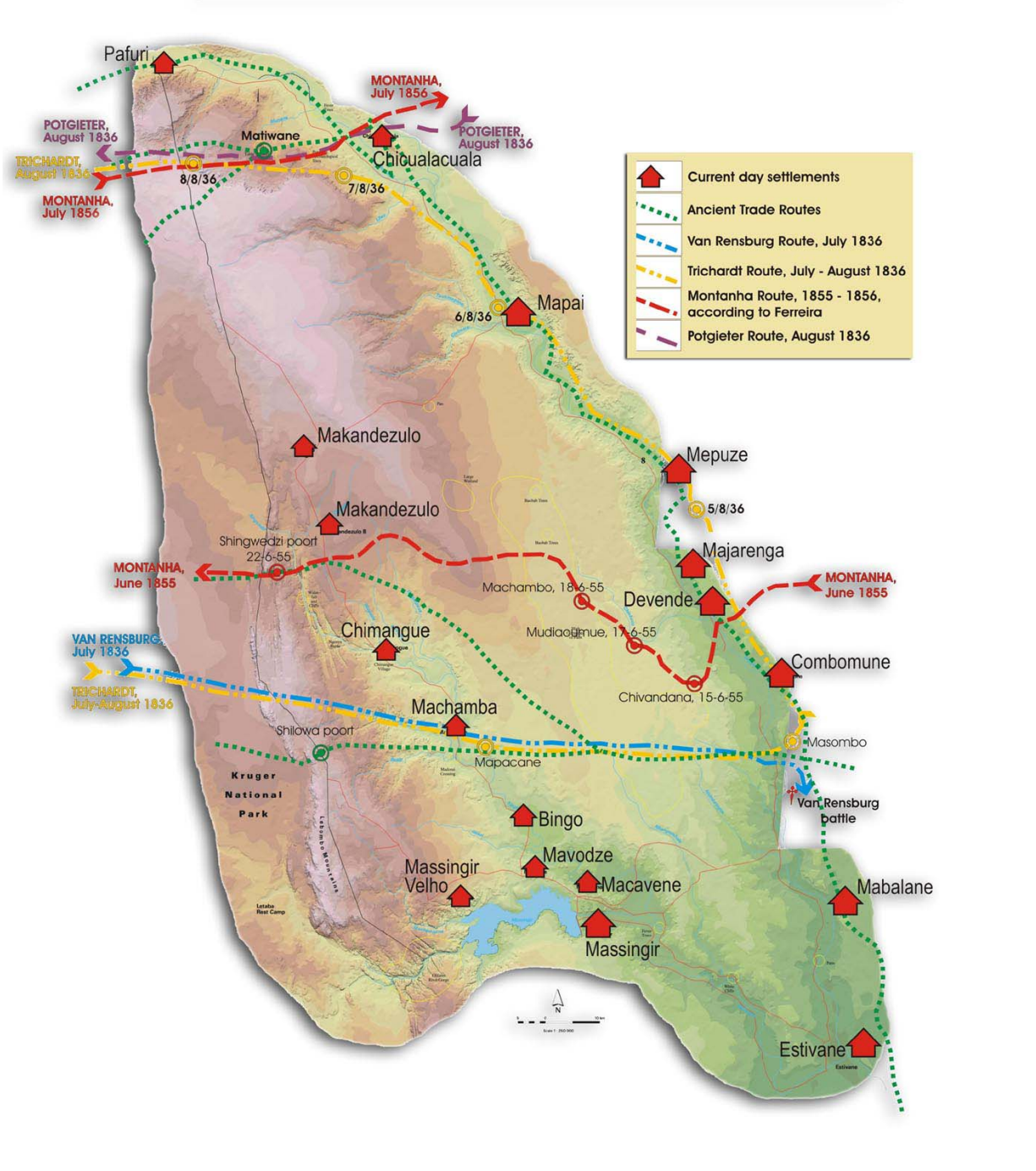
#### **4.4.2.2 People living in Limpopo National Park and resettlement issues**

When the Government of Mozambique proclaimed the Coutada 16 as Limpopo National Park in November 2001, it did so despite the fact that people were living within it. The World Bank reported that “*despite their efforts to resolve the fate of the communities living in Coutada 16, and the assurances given by GOM that the issue would be adequately resolved prior to any action, in 2001, the LNP was gazetted as a national park and some animals were allowed to enter the park area. This created a lot of media attention and controversy around the project*” (Webster, 2004: 11). The Wildlife and Forest Act 10/99, which addresses national parks in Mozambique does not mention resettlement from within parks, nor of people’s rights to land within such areas (Huggins *et al*, 2003). Therefore clarification is required to determine the extent to which Mozambican law regulates the national park, regarding settlements and user rights.

In all, it is estimated that there are 6 500 people living along the Shingwedzi River and close Massingir Dam, with an additional 20 000 people living along the Limpopo River (Huggins *et al*, 2003). The people living in the Shingwedzi River basin inhabit an area of approximately 3,700 km<sup>2</sup> these people are clustered in 9 villages: the biggest of them amounting to about 2,000 inhabitants, and the smallest to less than 150. Each homestead cultivates an average of about 3 ha of land, and there are more than 5,000 head of cattle (GFA Terrasystems, 2002). In 2001 it was estimated that homesteads in the area earn annual cash income of between US\$15 and US\$110 per year. The largest proportion of these earns US\$30-45 annually. However, while basic minimum household expenditure requirements exceed US\$25 per year, a “poor” household’s annual cash income rarely exceeds US \$15 (FEWS, 2001). Communities living along the Limpopo River as well as along the Olifants River in the south-east of the Park number approximately 20,000 people, settled in the support zone throughout about 40 villages (GFA Terrasystems, 2002). Current settlements in LNP are indicated in Figure 7.

A socio-economic survey of LNP in 2002 revealed that more than half of the homesteads within LNP had family members who migrated from the region, and 22% had lost family members during the war. There appears to have been a great deal of displacement and mobility in the area, but also a strong sense of attachment to places that people had to abandon during the war. Overall, 33% of the homesteads claimed to have lived in the same location since before the war (although this proportion is distorted since only 9% of people from Magude stayed). After the war there was re-settlement of the area, and particularly in rural villages. At Magude 81% of the homesteads returned to the localities and villages where they lived before the war. The majority of these homesteads are faced with the difficulties associated with the re-establishment of livelihoods, such as the lack of social infrastructure and services (ECI, 2002). The impact of the war has meant that many people have returned home over the last 10 years and are settling into village life and beginning to invest in their lives (Suni Ltda, 2002).

**Figure 7: Current habitation of Limpopo National Park**



Source: Limpopo Tourism Consortium, 2004

The LNP Tourism development plan states that tourism may have positive impacts on local communities through job creation and other opportunities (Limpopo Tourism Consortium, 2004). However, the plan also states that potential negative impacts on local people could be:

- voluntary relocation of locals residing inside the Park as soon as the fence of the sanctuary is removed; and
- wild animals breaking out of the Park, causing damage to crops, livestock or even people.

A resettlement process is underway in LNP to determine whether the inhabitants of LNP will remain there, or whether they will be relocated to areas outside the park and provided with compensation for the move. LNP has aligned its resettlement policy with the World Bank's safeguard policy on involuntary resettlement (Operational Policy 4.12). The first principle of this policy is that 'Resettlement must be avoided or minimised' (Huggins *et al*, 2003). A Resettlement Working Group (RWG) has been appointed which is composed of district administrators, provincial government officials, local leaders and community representatives. The RWG will draw up the Resettlement Action Plans (RAPs) (Limpopo Tourism Consortium, 2004).

The resettlement policy states that communities living along the Shingwedzi River and close to Massingir Dam are, ". . . located within the proposed primary park tourism zone and in terms of ensuring that the Park meets all of its objectives probably constitute the single greatest developmental challenge." (Huggins *et al*, 2003: 12). The Limpopo/Olifants population does not necessarily impact on the development of the management of the Park as a tourism and conservation area, and are less affected by the establishment of the Park than the Shingwedzi population (Huggins *et al*, 2003).

The resettlement policy considers the 'no resettlement' options with regard to creating fenced enclaves within the park, or remaining unfenced. Huggins *et al* (2003) suggest that in the enclave scenario, land available for farming and grazing would be limited and villagers would not be able to leave the enclave on foot, but would be dependent on arranged transport. If homesteads remained unfenced, there would be competition between people, livestock and wild animals over resources. Living with wildlife would also increase the danger of spreading diseases between domestic and wild animals. Although homesteads would be free to move, they would live in a more dangerous environment.

Livelihood options for people living within the park have been reviewed, and Huggins *et al* (2003) report that the Parks have indicated that all communities opting to stay within the enclaves will have access to all resources as per the LNP – community agreement, albeit now on sustainable utilisation principles. This will avoid a situation developing where communities would feel that they had no option but to move out of the LNP because their access to resources have been restricted in such a way that they can no longer survive within the LNP enclave community set-up. In addition people may claim preferential rights to the income and employment benefits that accompany the development of the Park. For example, there may be restricted amounts of employment as game wardens, park maintenance staff, and tourism opportunities.

Following discussion with District Administrators as well as in the meetings with the relevant Gaza Province local government authorities, three possible host resettlement sites have been suggested. These were (Huggins *et al*, 2003):

- resettlement into the support zone;
- densification of the area around Massingir (in effect urban or peri-urban resettlement); and
- resettlement into the surrounding districts.

Transfer of land management from community-based subsistence to a game park with tourism linkages is to develop land use from a low yield base to a much higher one. Therefore, people who give up their land to make the Park possible should benefit directly from increased value of utilisation. In effect this equity could be channeled in two ways (Huggins *et al*, 2003):

1. People who are settled in the Park and relocate are given a deed of entitlement, and therefore a part share in the profits of the Park. A community bed levy could be charged to visitors and this income would then accrue to those with entitlement deeds.

2. Entitlement deeds would be held by community trusts with income used to develop SMEs, services, infrastructure, community programs, etc. Administratively this option tends to be difficult to implement and often becomes a source of community tension.

The resettlement policy framework indicates that simply by realigning the GLTP boundaries. In the LNP Management Plan, an apparent contradiction between the description of the boundaries and the published co-ordinates is highlighted, as well as a Steering Committee recommendation that the boundary should be re-aligned in a participatory manner by the Project Implementation Unit of LNP (PIU) in association with communities in the affected area. It is suggested that with slight adjustments to the LNP boundaries in other areas (e.g. at Mabalane) the magnitude of population displacement and resettlement could be further reduced (Huggins *et al*, 2003).

Depending on the standard of the housing provided for people who resettle, it is estimated that the resettlement process will cost between €7.0 m (i.e. for plastered mud block structures, typical of better structures in the affected villages) and €9.9 m (i.e. for concrete blocks with communal toilets and running water) (Huggins *et al*, 2003).

A consultant working in Mozambique indicated that the voluntary resettlement programme was problematic because community members felt that they did not feel they had a choice regarding leaving LNP or not. Uncertainty of the timing of resettlement was also a problem when they were questioning whether they should plant crops for the season or not. Another stakeholder indicated that donors involved in the TFCA did not like the idea of people living in LNP retaining ownership of their land, and then using it as a basis for negotiation with the private sector in joint ventures. Such arrangements would provide the inhabitants with a financial incentive to leave the area, if a higher value could be generated through private sector investment and their equity in enterprises – than through subsistence farming.

#### **4.4.2.3      *Tourism investment***

In 2002 MITUR commissioned a review of existing legislation and procedures relating to the promotion and monitoring of private sector investment in the TFCA and to improve them where appropriate. The review included stakeholder meetings and workshops where solutions were recommended to overcome constraints identified. Similarly to the aim of the Mozambique Government, the meetings reflected a demand for planned and sustainable investments, rather than the current experience of largely ad hoc, unplanned investments do not have linkages with communities in the TFCAs, and are administratively inefficient (ICC, 2003). Investment constraints identified were grouped into six distinct areas:

- the regulatory and legal framework;
- TFCA relationships with other stakeholders;
- TFCA management structure;
- private sector institutional framework;
- the status of the infrastructure; and
- the availability of finance.

#### **4.4.2.4      *Tender processes***

There are currently no generally applicable public tender procedures under Mozambican law. Interests in game reserves (*coutadas*) or game ranches (*fazendas do bravio*) are awarded by concession, which are reviewed and approved by the Administrative Court. However, there are no statutorily established tender procedures for wildlife concessions, and the lack of clear and uniform procedures for granting concessions creates substantial risk for investors (ICC, 2003).

In the absence of a formal tender process, Limpopo National Park has used a process that requires business plans, but not empowerment objectives. They simply need to have a company registered in Mozambique before contracts are signed, but do not need to have a local partner (Pers. com. G. Vincente, 2004). However, proposed tender process guidelines developed by the ICC (2003) introduce environmental and socio-economic criteria for assessing bids. Although the proposed that the bidding criteria would be focused on the overall viability of the business, but would also include the proposed business relationship with affected local communities (type, benefits etc.); opportunities for establishing and promoting small medium and micro-business linkages; impact on direct and indirect job creation in the area; and environmental sustainability of the proposed utilisation of natural resources.

#### **4.4.2.5 *Hunting and government responsibility***

All hunting (except in defence of life and property) requires a license in Mozambique. The applications are directed to either MADER or MITUR depending on the classification of the area, and local communities have standing to participate in wildlife management. MADER and MITUR together establish the annual hunting season calendar and quotas for kills. However, unclear division of regulatory responsibility between MADER and MITUR increases uncertainty, and potentially cost, to investors. Furthermore, a division of regulatory responsibility may cause duplication of effort as between the different ministries and wasting scarce resources (ICC, 2003).

#### **4.4.2.6 *Infrastructure***

A representative of Futur, the Fundo Nacional do Turismo, indicated that accessibility to the LNP is currently a problem, and infrastructure links to the coast are required to increase the options for tourists (Pers. Com C. Faria, 2004). The ICC (2003) indicates that poor infrastructure in the GLTFCA has been blamed for the lack of private sector investment to date, especially roads, water and power, but that investment should be driven by biodiversity management needs, investors needs for income generating activities, and local communities requirements. The responsibility of the state, TFCA management unit and potential investors to develop different types of infrastructure needs guidance.

Futur indicated that it will take time for an effective small, medium and micro enterprise and service industry to develop that can support tourism in the GLTFCA. Currently enterprises working in the area reportedly need to import their supplies (Pers. com. C. Faria, 2004).

A private sector interviewee raised the issue of product differentiation between Mozambique and South Africa in relation to its accessibility. It was noted that due to the quality of the roads the travelling time from Maputo to Massingir four hours – but only two hours from Maputo to Kruger national park. Without unique attractions within LNP – why would tourists make the additional effort to travel there rather than KNP?

#### **4.4.2.7 *Finance***

The lack of accessible and affordable finance has been identified as a major constraint to investing in the TFCAs at every level (ICC, 2003). Irrespective of the level (large scale investment, SMME and microenterprise) common themes emerged:

- lack of collateral on which to secure loans
- lack of transparency in processes through which resource allocation takes place
- fears about security of tenure

Stakeholders reported that there was not access to micro-credit, and that financial terms available were very difficult for larger loans (e.g. 18-20% interest with repayment periods of 7-8 years). Some incentives, such as tax holidays, were available, but the terms were still more difficult than in other countries (Per. com. Faria, 2004).

## **5 DISCUSSION AND IMPLICATIONS**

### **5.1 Tourism infrastructure in the TFCA**

There is an extreme disparity between the level of tourism investment that has taken place between South Africa, Zimbabwe and Mozambique within the GLTFCA area since 2000.

South Africa has enhanced its capital by improving and enhancing its extensive baseline accommodation and access infrastructure that is used for photographic tourism. SANPark's tourism concessioning process and tourism developments in the Makuleke area of KNP have been characterised by institutional structures that facilitate local socio-economic and environmental benefits to be harnessed, while realising significant capital investment. Sources of finance for investment have included government the private sector, and donors with the concessioning process facilitated by the IFC. South Africa, however, has a far simpler situation than Zimbabwe or Mozambique, since there are no permanent inhabitants of KNP. The Makuleke have developed a tourism establishment in the Pafuri triangle and are in the process of developing another. Their joint ventures with the private sector have stimulated socio-economic improvement to the community including collective and individual benefits. Perhaps most interesting, is that their tourism product is evolving from trophy hunting to photographic tourism as their infrastructure improves. Since 2000, at least US\$30.0 m has been spent on tourism infrastructure within the South African portion of the TFCA. This investment has been sourced from national government and the private sector.

Zimbabwe's unsettled political situation and unstable land tenure situation has led to a collapse of the photographic tourism industry. There was no evidence that any tourism infrastructure investments had been within Gonarezhou since 2000, and it appears that financial support from international donors has evaporated. There were indications that minor improvements to tourism infrastructure had taken place on private land falling within the TFCA, such as the Malilangwe Trust, although the actual amount spent was not ascertained. There are proposals to include part of the Sengwe Communal Land into the TFCA, but no tourism investment has been made there to date. The government has proposals to spend Z\$2.2 billion (R3.2 million) improving infrastructure in Gonarehou (Chikanga, 2004), but it remains to be seen as to whether this target can be realised under current circumstances.

Mozambique is in the planning phases of its tourism investment in LNP, with minimal existing tourism infrastructure in the Banine, Zinave or the national park (which was developed by the former hunting concessionaire). The tender processes within the park, interestingly, do not yet incorporate measures to stimulate concessionaire corporate social responsibility. This study estimated that at least US\$8.7 m has been spent on infrastructure development and planning within LNP since 2000, sourced from international donors and NGOs. Although difficult to separate out what some of the investment has been used for, at least US\$820,000 of this was directly attributable to tourism infrastructure. The only tangible evidence of a tourism development in the TFCA so far is a community lodge at Covane, near Massingir, facilitated by Helvetas. Although private concession sites have been granted for areas of land south of LNP and adjoining KNP, there were no indications that any tourism investment had taken place to date, and it is suggested that investors are waiting until fences are dropped with KNP before they do so. The World Bank has made

considerable investments into the planning process for TFCAs in Mozambique. Between 1997 and 2003 a US\$7 m pilot project worked to develop infrastructure, capacity and to mobilise communities in TFCAs around the country, and an additional \$34.5 m has been allocated between 2005 and 2020 to continue this work, including a contribution of \$3.4 m from the government (although not all of this will be spent on the GLTFCA).

## 5.2 Drivers and constraints between the three countries

The nearly 100,000 km<sup>2</sup> Great Limpopo Transfrontier Conservation Area (GLTFCA) was initially agreed between the governments of Zimbabwe, South Africa and Mozambique in 2000, but the smaller area of the Great Limpopo Transfrontier Park (GLTP) (which predominately consists of existing protected areas, and covers about a third of the GLTFCA) has received most emphasis since 2002 when the treaty was signed. The transboundary area has been driven by a range of stakeholders from the participating countries and the international community. The GLTP is seen, by some, as an initial phase in the development of the wider GLTFCA.

Institutional structures that draw stakeholders from the three countries together have been agreed, their responsibilities developed, and they are working to collectively draw the GLTP together. Plans have been devised, consultations processes have been undertaken (albeit rather late on in the process), and slowly the TFCA is moving forward. At some stages the process has moved forward more quickly than some would have liked (e.g. see Box 1) but realistically, the time when tourists will be able to travel within the TFCA across the three national borders, view wildlife and stay at accommodation across the 33,500 km<sup>2</sup> is still a few years away.

Stakeholders driving the process from an investment perspective have included the participating governments, their conservation agencies, international organisations (e.g. World Bank), foreign donors and development agencies (e.g. KfW, USAID, CESVI), NGOs (e.g. Peace Parks Foundation, Helvetas), and the private sector (e.g. concessionaires). This study identified that \$52.5 m had been spent on the planning and development process since 2000, and this is certainly an underestimate due to the availability of information from the three countries.

As this report has shown, progress to develop tourism has been constrained by different levels of infrastructure and capacity within the three countries to realise their objectives, areas of political instability, land tenure issues, and addressing the needs of existing inhabitants of the area. Constraining the strategic plan for the entire TFCA, animal health implications of merging wildlife populations of the three countries have yet to be fully investigated and resolved – especially with regard to their potential contact with livestock. No real constraints to tourism investment were identified in South Africa, but it was clear that the situation was less favourable in Zimbabwe and Mozambique.

In Zimbabwe, the instability and land occupations related to the fast-tracked land reform process have led to dramatic declines in the tourism industry (and therefore the revenue it generates) and the withdrawal of international financial support. Gonarezhou and neighbouring conservancies have been occupied during this process. The new inhabitants have consequently killed wildlife and attempted to grow crops, which has undermined the credibility of Zimbabwe's contribution to the TFCA. The prognosis for the contribution of the Sengwe Communal Land to the GLTP is uncertain, but there are positive indications that negotiations may lead to an area being set aside as a wildlife corridor to KNP. Although Zimbabwe is signatory to the TFCA agreement, it is difficult to appreciate how they will realise their responsibilities in the short and medium-term. Although it could be argued that Zimbabwe's policy to re-allocate land to the landless is one that could have led to the upliftment of poor people, the lack of transparency, consistency and legal basis for the transition has fundamentally undermined the economy of the country.

Constraints within Mozambique include the lack of existing infrastructure, concession and land issues, and social concerns. LNP, Banhine, Zinave and the interstitial areas have little existing tourism infrastructure, and accessing the areas with a limited and poor quality road network is very difficult. There are no standardised tendering processes for concessions in the TFCA, and unclear coordination between the different government ministries responsible for different types of land. There are no current requirements for tourism investors to show how they will contribute to environmental conservation and the local economy. LNP in Mozambique is inhabited by around 26 500 people, although the national law has no provision for people living within its national parks. It is widely acknowledged that public participation in the TFCA was undertaken very late in the process (Koch, 2004), and significantly, after international agreements had been signed. The resettlement process is currently addressing the livelihoods of these people, and will determine whether they will remain inside the park or be compensated for relocating elsewhere. If they are relocated, will they retain 'ownership' over their land in the park, and derive benefits from tourism occurring there – as has occurred with the Makuleke.

Dzingirai (2004) recognised that although the GLTP treaty specifies that the participating states will undertake to collaborate in transfrontier resource management, it does not indicate whether local communities will own those resources. Although TFCAs may improve the mobility of wildlife across larger landscapes, they may disenfranchise transfrontier communities by reducing their traditional access and control over resources, by transferring their resources and lands to the state and private business.

### 5.3 Implication for research on tourism in the TFCA

The GLTFCA is in the early stages of development. Over the past five years plans have become more conservative and led to the concentration on the GLTP. South Africa has a well developed tourism industry and infrastructure within the park; Mozambique is has minimal infrastructure and is at the planning stages for tourism; and Zimbabwe's investment has been heavily constrained by a lack of funding ensuing from political unrest and land instability. Therefore, it could be argued research on tourism investment in the GLTFCA, as this work was originally conceptualised, is premature. It is too soon to evaluate what the environmental and social impacts of tourism investment will be in the GLTFCA, as the destination is not sufficiently developed. Although this study has revealed the level of tourism developing existing and planned in the participating countries, the implications for sustainable tourism cannot yet be evaluated. The interest in this area therefore lies in understanding the drivers and constraints to the development process, and the institutional structure that may underpin sustainable development, which have been addressed in this scoping report. As the TFCA develops, as tourism returns to Zimbabwe, as tender processes for concessionaires evolve in Mozambique, as socio-economic problems are addressed in addition to conservation management, and as linkages with other destinations in regional circuits are realised, the implications of the area for sustainable tourism will become clearer.

What is clear is that through the process of planning and development, stakeholders are learning more about the complex issues involved in catalysing a sustainable nature-based tourism industry. They are learning more about the market demand for nature-based tourism (e.g. SANParks concessioning process); more about how to address local community issues – especially with regard to people living within the TFCA (e.g. Sengwe Communal Area, Limpopo National Park); more about developing viable community based tourism ventures (e.g. Makuleke, Covane Community Lodge); more about the environmental impacts of nature-based tourism (e.g. SANParks concessioning process); and more about the fragility of the industry in relation to political instability and uncertainty of land tenure (e.g. Zimbabwe). An adaptive approach to the TFCA development

is compatible with sustainable tourism development, and Hunter (1997) argued that it must address widely divergent situations, different goals and different mechanisms of utilisation. The extent to which tourism in the GLTFCA will develop in such a way that it does not degrade the environment to the extent that it prevents the successful development of other activities, remains to be seen.

An important consideration for tourism investment planning in the GLTFCA is the implications of underperformance by SANParks' concessionaires. All of the accommodation concessionaires in KNP made higher capital investments than they had predicted in their bids (between 22% and 118% more), while the aggregate net revenue was just 35% of what they had anticipated over the first three years. Mozambique has initiated a concession process for tourism investment in Limpopo NP, but how will it avoid the same problems? MORE ON IMPLICATIONS AND FOR EMPOWERMENT – WHAT EXTENT WAS THIS A PROBLEM – BACK TO Annemie's report.

This scoping report has been limited in the availability of certain information, which was not available or not obtained. When reviewing this report it should be understood that a more detailed analysis, a more extensive field trip, and further stakeholder consultation would probably have revealed more tourism investment in the GLTFCA, and so the investments described here probably underestimate the real level of activity. The report is effectively based on information sourced from 73 stakeholders in the region and 188 pieces of academic and grey literature, but although extensive, this scoping report should not be regarded as completely comprehensive. Ideally, more information would have been sourced on the structure of investments made and regarding private sector investments throughout the area, coupled with detailed breakdowns of how expenditure had been allocated.

This report constitutes the end of the first phase of this research, providing an overview of tourism investment in the GLTFCA. The next stage will attempt to draw key stakeholders together into a workshop to review these issues and suggest how the process could be adapted to promote responsible tourism and sustainable development. Subsequently, an attempt will be made to track the impact of investment at one destination in order to ascertain the implications for sustainable development.

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### **Personal communications**

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- Bartolomu Soto, Transfrontier Conservation Area Chair, 2004
- Carlos Pacheo Faria, Futur, 2004
- David Cumming, AHEAD, 2004
- Geraldo Palane, Hevetas, 2004
- Giju Varghese, Senior manager, Commercial Development Unit, SANParks
- Gilberto Vincente, Limpopo National Park, 2004
- Isilda Nhantumbo, IUCN, 2004
- Kate Rivett-Carnac, Department of Trade and Industry, 2004
- Megui Adelina Bila, Centro de Promoção de Investiments, 2004

Michael Schneider, Eduardo Mondlane University, 2004  
Peter Fearnhead, African Parks, 2004

## APPENDIX 1: STAKEHOLDERS WHO PARTICIPATED IN THE SCOPING STUDY

### Meetings held in Johannesburg and Pretoria, September-October 2004

Tuesday 28 September	Piet Theron, South African National Parks
Wednesday 29 September	Melissa Fourie, IUCN Tim Foggin, University of KwaZulu Natal Melissa Bonneton, ADF Jennifer Seif, Fair Trade in Tourism South Africa
Thursday 30 September	Chris Rogerson, University of the Witwatersrand Conrad Steenkamp, TPARI Ingrid Koch, University of the Witwatersrand
Friday 1 October	Garry Mullins, ECI Sue Geldenhuys, Tshwane Technikon Clive Poultney, Wilderness Safaris Caroline Ashley, Overseas Development Institute, Gareth Haysom, Pro-Poor Tourism Adrienne Harris, Tourism Business Council of South Africa
Saturday 2 October	Kate Rivet-Carnac – Department of Trade and Industry
Monday 4 October	Rod de Vletter, World Bank/SEATIP Agi Kiss, World Bank Judy Oglethorpe, World Wide Fund for Nature Jean-Michel Pavy, World Bank
Tuesday 5 October	Michael Schneider, Eduardo Mondlane University Maria Julieta Martinho, Eduardo Mondlane University
Wednesday 6 October	Gerado Palane, Helvetas Carlos Pacheo Faria, Futur Isilda Nhantumbo and Samiro Magane, IUCN Mozambique Bartolomu Soto, Ministry of Tourism
Thursday 7 October	David Hankers, Polomo Hotel Megui Adelina Bila, CPI Gilberto Vicente, PIU
Friday 8 October	Tanya Kleibl, Community assessment Limpopo Rod de Vletter, World Bank

**Stakeholders who contributed information by phone or email (September 2004 – January 2005)**

Andre van Zyl, Conservation Leadership Group  
Andrew Mayoral-Phillips, Consultant  
Arrie van Wyk, Limpopo National Park  
Blake Shrader, South African National Parks  
Bram Buscher, Centre for International Co-  
operation, Amsterdam,  
Bryan Dingley, Dinson & Associates  
Carla Constantinescu, Consultant  
Cecil Machena, Africa Resources Trust  
Charles Bescancon, Consultant Transboundary  
protected Areas  
Charles Breen, Consultant  
Colin Bell, Wilderness Safaris  
Darryl Lombard, Lorton consulting  
David Cumming, WWF-Zimbabwe  
Derek de la Harpe, Malilangwe Trust  
Eben Chonguica, IUCN-ROSA  
Eddie Koch, Mafisa  
Excellent Hachileka, IUCN - Regional Office  
for Southern Africa  
Goetz Schuerholz, KfW  
Helen Suich, Conservation International  
Irene Visser, IBO Consortia  
Johann Kotze, Department of Environmental  
Affairs and Tourism  
John Ledger, Endangered Wildlife Trust  
Jorge Ferrão, Limpopo National Park

Lamson Maluleke, CPI,  
Leo Braack, Conservation International  
Les Carlisle, Conservation Corporation Africa  
Mapula Makara, Tourism Enterprise  
Programme  
Marc Stalmans, International Conservation  
Services  
Melissa de Koch, Peace Parks Foundation  
Melissa Fourie, IUCN  
Mike Murphree, Institute of Natural Resources  
Myles Mander, Institute of Natural Resources  
Noel de Villiers, Open Africa Initiative  
Owaiz Kahn, Limpopo Province  
Peter Fearnhead, African Parks  
Peter Myles, University of Port Elizabeth  
Peter Norton, Peter Norton and Associates  
Phanuel Mugabe, Centre for Applied Social  
Studies, University of Zimbabwe  
Rowan Martin, Consultant  
Simon Metcalfe, African Wildlife Foundation  
Simon Munthali, African Wildlife Foundation  
Stephen Turner, Centre for International Co-  
operation, Amsterdam,  
Steve Collins, GtZ  
Tim Anderson, ECI  
Will Wolmer, Institute of Development Studies

## APPENDIX 2: TOURISM INVESTMENT DATABASE

### Great Limpopo Transfrontier Park

Note that gaps have been left where investment amounts are uncertain

#### Tourism investment database: actual expenditure rather than proposed

No.	Funding agency	Implementing agency	Location	R to \$ = 6.67		Dates	
				Amount	Amount \$	From	To
<b>SOUTH AFRICA</b>							
1	DEAT	SANParks	Giriyondo Border Post and Infrastructure	R 7,623,000	\$1,142,879	2001	2003
2	DEAT	SANParks	Gravel acces Road to Giriyondo Border Post	R 3,338,000	\$500,450	2001	2003
3	DEAT	SANParks	Pafuri Border Post Tar Road	R 14,960,000	\$2,242,879	2001	2003
4	DEAT	SANParks	Design Development of Crossing over Limpopo River	R 800,000	\$119,940	2001	2003
5	DEAT	SANParks	Upgrading of existing Road Network North of Shingwedzi	R 1,982,000	\$297,151	2001	2003
6	DEAT	SANParks	Punda Maria Tented Camp Facility and Pool	R 3,600,000	\$539,730	2001	2003
7	DEAT	SANParks	Dropping of 20km of Eastern Boundary Fencing	R 485,000	\$72,714	2001	2003
8	DEAT	SANParks	KNP Research Infrastructure Development	R 3,560,000	\$533,733	2001	2003
9	DEAT	SANParks	Makhadzi Picnic Site and Environmental Education Centre	R 1,750,000	\$262,369	2001	2003
10	DEAT	SANParks	New Pafuri and Punda Maria Entrance Gate, Environmental Education Centre and Day Visitors Site	R 7,400,000			
11	Poverty Relief Fund	SANParks	Upgrading of Staff Accomodation - KNP	R 10,000,000	\$1,499,250	2002	2004
			Partial Upgrading of Western Boundary Foot & Mouth Fencing	R 2,500,000	\$374,813	2002	2004
12	Poverty Relief Fund	SANParks					
13	Private Sector sourced	Singita	KNP concession accomodation capital expenditure	R 38,830,000	\$5,821,589	2000	2004
14	Private Sector sourced	Jock	KNP concession accomodation capital expenditure	R 9,000,000	\$1,349,325	2000	2004
15	Private Sector sourced	Mluwati	KNP concession accomodation capital expenditure	R 9,743,453	\$1,460,788	2000	2004
16	Private Sector sourced	Jakkalsbessie	KNP concession accomodation capital expenditure	R 24,750,000	\$3,710,645	2000	2004
17	Private Sector sourced	Lwakahle	KNP concession accomodation capital expenditure	R 9,222,000	\$1,382,609	2000	2004
18	Private Sector sourced	Mtulumuvi	KNP concession accomodation capital expenditure	R 5,782,500	\$866,942	2000	2004
19	Private Sector sourced	Mpanamana	KNP concession accomodation capital expenditure	R 35,000,000	\$5,247,376	2000	2004
20	Private sectors sourced	The Outpost	Makuleke, Kruger	R 10,005,000	\$1-1.5 m	2002	2003
				<b>Subtotal =</b>	<b>\$30,034,626</b>		
<b>ZIMBABWE</b>							
1	Private sectors sourced	Malilangwe Conservation Trust	Malilangwe conservancy renovations		?		
<b>MOZAMBIQUE</b>							
1	Heveltas	Heveltas	Covane lodge, Massingir		\$20,000	2002	2003
2	USAID	Heveltas	Covane lodge, Massingir		\$50,000	2002	2003
3	KfW	Peace Parks Foundation	Limpopo National park	€ 6,000,000	\$7,870,800	?	?
4	Government	Limpopo National Park	Grionde Border Post		\$750,000	2004	?
5	GEF Trust Fund	GoM	TFCAs (pilot project) including GLTFCA		\$7,000,000	1997	2003
				<b>Subtotal =</b>	<b>\$15,690,800</b>		

