

How much remains? Local value capture from tourism in Zambezi, Namibia

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ABSTRACT

High hopes are pinned on tourism and its catalytic potential to foster growth in remote rural areas. In the Zambezi region of northeastern Namibia, tourism plays a key role in the design of community-based natural resource management (CBNRM) programmes for nature conservation. Local communities form conservancies, small village-based entities of bottom-up nature conservation activities. These conservancies are granted rights for the use of natural resources, which are then transferred to tourism investors and trophy-hunting companies. Thus, conservancies partly determine tourism's developmental outcomes on a local level. By applying a global production network (GPN) approach, the objective is, first, to assess how much of the turnover generated in the Zambezi region remains in the region and, second, to examine the extent to which conservancies, as newly formed local institutions, enable communities to capture value from tourism. A mixed-methods approach is applied, using a business survey, qualitative interview data and financial reports which allow a calculation of value capture. Roughly 20% of the value generated by the tourism industry in the Zambezi region is captured locally. In addition, conservancies play a key role in the GPN, acting as hinges between the local and the global: conservancies are involved in the production of the resource, mediate in strategic coupling processes and use regulatory and bargaining power to capture value. Conservancies therefore have the potential to increase local gains from tourism. On the one hand, these results underline the importance of local institutions for value capture in GPN analysis. On the other hand, as local linkages are limited and the level of local ownership is low, policies are needed that ensure the participation of local residents beyond direct transfer payments from private enterprises to communities.

摘要

人们对旅游业及其促进偏远农村地区经济增长的潜力寄予厚望。在纳米比亚东北部的赞比西河地区，旅游业在设计以社区为基础的自然资源管理(CBNRM)自然保护方案中发挥着关键作用。当地社区形成了由下而上的，以小村庄为基础的自然保护实体。这些保护区被授予使用自然资源的权利，然后将这些资源转让给旅游

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投资者和狩猎公司。因此,保护区在一定程度上决定了当地旅游业的发展效果。本文采用全球生产网络的方法,目的在于:第一,评估赞比西河地区产生的营业额中有多少仍在该地区,第二,审查作为新成立的地方机构的保护项目在多大程度上能使社区从旅游业中获得价值。本文采用混合方法,使用商业调查、定性访谈数据与财务报告,可以核算计算价值成果。研究发现,赞比西地区约20%的旅游业创造的价值都是由当地赚取的。此外,保护组织在GPN中扮演着关键的角色,在当地和全球之间起着关键作用:保护组织参与资源的生产,在战略耦合过程中起到调解作用,并利用监管和讨价还价的能力来获取价值。因此,保护区有可能增加当地旅游业的收益。一方面,这些结果强调了本地机构在GPN分析中获取价值的重要性。另一方面,由于地方联系有限,地方所有权水平低,需要制定政策,确保当地居民参与除私营企业向社区直接转移支付以外的收益。

Introduction

Many researchers stress the potential of tourism for promoting economic transformation and poverty reduction (Rogerson, 2012). Southern Africa in particular, with its vast population of internationally valued species, has been targeted by international donors with the aim of creating conservancies (Dressler et al., 2010). In contrast to earlier more exclusionary conservation models, conservancies are based on three key ideas: first, regulations that allow the local population to manage independently their natural resources, such as wildlife or forest products, second, the active management and use of the resource and third, the establishment market mechanisms (Silva & Mosimane, 2014).

In Namibia, the establishment of conservancies was a means to overcome the historical legacy of apartheid, empowering rural communities in their struggle over resource control (Kavita & Saarinen, 2016). Community-based natural resource management (CBNRM) is an increasingly popular concept among policymakers and conservationists to combine both regional development and nature conservation (for an early overview in African countries see Roe et al. (2009), for topic orientated literature on CBNRM see e.g. Silva & Mosimane (2014) and Bollig & Menestrey Schwieger (2014)).

Although nation states implement CBNRM programmes in various forms, they are based on one basic principle: to grant communities rights of use for their natural resources and reward them for implementing protective measures (Murphree, 2009). Conservancy management boards are formed that implement and monitor conservation measures in clearly demarcated areas. Thus, conservancies have the opportunity to generate income by selling hunting quotas and tourism concessions.

Safari and hunting tourism are two important and complementary income generating sources (Naidoo et al., 2016). While the former is commonly accepted as a means of connecting with global markets, the latter is subject to criticism. Debates on hunting tourism are generally associated with the conservation discourse (Novelli et al., 2006) and follow ethical or ideological battle lines (Batavia et al., 2019). Despite being an industry worth 200 million USD in sub-Saharan Africa alone (Lindsey et al., 2007), trophy hunting has been widely neglected in research regarding tourism's development potential. This neglect comes as a surprise as this activity has the potential to

channel resources to distant areas that have few cash-generating income opportunities (Naidoo et al., 2016).

The economic contribution that hunting tourism can make to conservation projects is the subject of an ongoing discussion: some researchers stress its economic potential (Samuelsson & Stage, 2007), while others tend to downplay its effects (Economists at Large, 2013). However, the results of CBNRM policies vary widely both between and within countries. Namibia is generally perceived as one of the more successful cases in debates surrounding CBNRM.

The objective of this paper is to examine the ability of conservancies, as local institutional entities, to capture value from being integrated into the global tourism industry. Conceptually, we apply the global production network (GPN) concept to assess how well regions are embedded in the global tourism value chain. The GPN concept as a further development of Gereffi's Global Value Chain approach (GVC, Gereffi et al., 2005) acknowledges (1) the importance of extra-firm actors (e.g. state agencies, non-governmental organizations), (2) stresses a multi-spatial dimension in firm-territory interactions reaching from the local and sub-national to the macro-regional and global level, (3) incorporates inter-firm relations in production systems in addition to the classical vertical integration, and (4) recognises the role of regulatory and institutional factors influencing GVC governance (Coe et al., 2004; Yeung, 2015).

Against this background, this study aims to assess how much of the value created in tourism remains at local level. Based on findings from northeastern Namibia, this paper has three objectives: (I) to analyse the economic linkages and ownership structures of the tourism GPN, (II) to contribute to an understanding of the role of conservancies as actors in the tourism GPN and (III) to measure the success of these local institutions in capturing value at local level. The underlying assumption is that strong local institutions are able to retain value at the local level, which prevents the transfer of surpluses to different spatial scales of the GPN.

The structure of this article is as follows: first, theoretical overlaps between GPN discourses and CBNRM are outlined. Second, a description of the study area and the research design follows. Third, ownership patterns and economic linkages of the tourism GPN in the Zambezi region in northeastern Namibia are analysed. Fourth, different functions of conservancies in the tourism GPN are shown. Fifth, an analysis of financial flows reveals the abilities of conservancies to retain value.

Local institutions in the tourism GPN

Conservancies aim to integrate with tourism global production networks by attracting investors in ecotourism and hunting tourism. By marketing natural resources as a tourist attraction, wildlife is given a direct use value. Thus, CBNRM programmes are in line with utilisationist conservation strategies, following market-driven concepts (Moore, 2011) and leading to further commodification of natural resources.

By establishing new commons of wildlife management, communities are granted specific rights, which are then transferred to actors in the private sector (Bollig, 2016). In a similar vein, Garland (2008) describes the current conservation field as 'a means of appropriating the value of African nature and of transforming it into capital with the

capacity to circulate and generate further value at the global level' (p. 116). CBNRM programmes in this context can be understood as 'struggles over resource control' (Garland, 2008, p. 62) – the local population is claiming profits that were previously withheld by colonial powers or political elites. Despite the appraisal of CBNRM programmes, research warns that trophy hunting reproduces colonial power relations and excludes local populations from wildlife utilisation (Koot, 2019). However, the marketing of natural commodities to global enterprises lies at the core of the CBNRM concept (Murphree, 2009). By commodifying wildlife, conservancies connect with the tourism global production network.

The tourism GPN

GPNs are increasingly popular concepts for analysing economic interconnections between spaces in globalised production processes. These interconnections are revealed by examining various production stages of a commodity and the actors involved at different spatial levels. While GPN and GVC analysis is generally applied to tangible commodities, such as manufactured goods, the rise of the service sector and the knowledge economy has led to growing interest in intangible goods. In tourism research, the conceptualisation of tourism as a GPN is relatively recent but expanding (Christian, 2016; Daly & Gereffi, 2018; Erkuş-Öztürk & Terhorst, 2010).

It can be argued that GPN research leads to a better understanding of how sub-national spaces and institutions interact with global networks (Fold, 2014). Moreover, the network perspective is more sensitive to including non-firm actors in the analysis, which is crucial for a ramified industry like tourism (Erkuş-Öztürk & Terhorst, 2010). Yet, if tourism is conceptualised as a GPN, what is the commodity being produced? A particularity of the tourism value chain is the simultaneous production and consumption of the commodity, the tourist experience. Judd (2006) argues that the 'tourist experience is a product consciously produced and marketed, its value is determined by the cost of the inputs necessary for its construction' (p. 324). From this viewpoint, the inputs are marketing and the investments in place are infrastructure and labour.

Local institutions in GPN debates

The purpose of this study is to reveal the role of local institutions in the value capture process in GPNs. Value capture describes the ability of regional institutional actors to retain the value created in the region for the benefit of the region (Coe et al., 2004).

When GPNs anchor in a region, they are embedded in multi-scalar institutional frameworks referred to as 'regional institutions'. However, these institutions are regional not because they are necessarily based in the region, but because they have an impact on activities within the region. The composition of these regional institutions is manifold: it includes organisations and actors at different spatial levels, such as international organisations, business associations, national agencies, local authorities and development agencies. Furthermore, location-specific conventions and norms are part of the concept of regional institutions (Coe et al., 2004).

Value capture depends on the density of these institutional networks – the institutional density of the location where the operation takes place can impact on the development outcomes of strategic coupling with GPNs (Fold, 2014). Strategic coupling is the dynamic process of connecting regions by establishing economic linkages to lead firms (Yeung, 2015). In the case of the tourism industry these lead firms are global travel agents such as TUI, alltours or Thomas Cook. The coupling can be initiated via the mediation of regional institutions whenever regional assets meet the strategic needs of the mentioned global travel agents. Value capture is determined by the ability of these institutions to negotiate with lead firms (Coe et al., 2004), as has been shown in the case of extractive industries (Bridge, 2008). The production of a natural resource is location-bound and embedded in ownership structures, institutions and political structures (Bridge, 2008). Due to their ability to collect and process information on a global scale, lead firms may have strong bargaining positions. On the other hand, regions can have a strong bargaining position when their regional assets match the strategic needs of lead firms (Coe et al., 2004).

Such negotiations result in different degrees of value capture, depending on control and power dynamics between regional institutions and lead firms (Coe et al., 2004). With a higher rate of domestic tourism, national tour operators have a stronger bargaining position in negotiations with global travel agents. A low rate of domestic tourism leads to dependence on overseas outbound tour operators to connect to global markets. Global lead firms, therefore, have a strong position within the network, leading to specific linkages and leakage dynamics (Daly & Gereffi, 2018).

Empirical findings have shown how different sets of regional institutions shape varying developmental outcomes of GPN coupling in the case of the oil and gas industry (Breul & Revilla Diez, 2018). Parallels can be detected between tourism and the extractive industries (Garland, 2008): just as with extractive industries, nature tourism is based on a natural resource that needs to be tapped by means of investment in infrastructure. Scholars have called tourism an ‘ostensibly sustainable form of resource extraction’ (Fletcher, et al. 2014, p. 364).

However, research on GVCs and GPNs has so far focussed mainly on inter-firm relations, thereby playing down the role of institutional actors. In recent years, the debate has been criticised as being firm-centric and the role of the nation state in value capture dynamics has been highlighted (Horner, 2017; Kalvelage & Breul, 2017). Horner (2017) shows that the state can play an active role in GPNs – as a facilitator, regulator, producer and buyer.

The role of regional or local institutional actors in coupling processes has been elaborated, but the focus has been on the efforts of regional institutions to attract investments (Kleibert, 2014). The role of local institutional actors in value capture dynamics remains largely unexplored.

Research design

The application of a mixed-methods approach has proven to be useful in GPN analysis (Hess & Yeung, 2006). Qualitative semi-structured interviews with GPN actors in Windhoek and Zambezi were combined with a business survey, a review of secondary

sources, and the analysis of existing financial data. The data are the result of two fieldwork periods in the Zambezi region in northeastern Namibia and Windhoek, the capital city, in May 2018 and August to November 2018, four months in total. The focus was set on the relations between private enterprises and institutions in the resource region, as the study is concerned with value capture dynamics on a local level. Windhoek as the capital is host to most national government bodies and was therefore included in the analysis to embed the findings into a broader network.

Beforehand, desk research had been conducted to identify actors of the tourism GPN in the Zambezi region. A first step in the identification of tourism businesses, especially lodges, was the analysis of the *tn mobile Directory 2016/2017* (Telecom Namibia, 2017) and common web portals: *booking.com* (<http://www.booking.com>) and *google maps* (<http://www.maps.google.com>). After updating the list of enterprises in the field, a total of 47 lodges were contacted via phone and/or personal visits aiming for a complete survey. 22 lodges (denoted as 'lod' in the following) agreed to a face-to face interview which was conducted with the manager or owner of the enterprise.

Due to the central role of conservancies in the tourism sector, all 15 conservancies in the Zambezi region had been contacted to participate in the survey. Members of the conservancy management board, preferably the enterprise officer, were targeted as they are responsible for negotiating with private industry actors. Twelve conservancies were interviewed in this study (denoted as 'con' in the following).

The interviews with the conservancy managements and the lodges were guided by two different semi-structured guidelines, interviews took roughly one hour. The questions were partly derived from the theoretical underpinnings of this study and were partly open to additional topics. This procedure was intended to reveal negotiation dynamics with external partners and insights into internal decision-making processes. A snowball sampling technique was applied to identify other relevant actors of the GPN through the interview partners. Following up on this information, further organisations that were identified as stakeholders in the tourism/conservation sector were contacted to be included in the study: four business associations (denoted as 'ba' in the following), four government agencies (denoted as 'gov') in Katima Mulilo and Windhoek (denoted as 'KM' and 'W'), three NGOs and international organisations (denoted as 'ngo'), two hunting (denoted as 'ho') and three tour operators (denoted as 'to'). This list is, however, not exhaustive and does not involve actors in outbound countries.

The interview material was recorded and transcribed. A deductive qualitative content analysis was applied to form theoretically guided categories (Mayring, 1994). During the coding process, categories were revised based on the empirical findings and finally interpreted in the light of the theoretical background. These analytical categories serve to structure this article in the sections presented below.

In addition to the qualitative interviews, a quantitative factsheet (business survey) was presented to evaluate general enterprise data, employment figures, booking procedures, supply chains and expenditure. Thus, data were collected for the evaluation of ownership patterns, local linkages and industrial linkages with other GPN actors. Due to time shortages, some lodges refused to take part in the qualitative part of the survey, but accepted to answer the quantitative questionnaire. Thirty-three businesses out of 47 in total answered the quantitative factsheet.

In addition, available secondary quantitative datasets from stakeholders were collected for further analysis. These datasets include figures collected by the Namibian Association of CBNRM Supporting Organisations (NACSO), parts of which are publicly available on the NACSO website (<http://www.nacso.org.na>), and financial data from the Namibia Tourism Board (NTB), which reports the monthly payments of tourism levies. Furthermore, secondary sources such as relevant academic literature, policy reports and online content were reviewed to interpret and frame the results of the study.

The high response rates of tourism GPN actors allow a detailed picture to be drawn of the tourism industry in the Zambezi region. By surveying different stakeholder groups and combining qualitative and quantitative data, it was possible to triangulate results. However, many lodges refused to share detailed financial information which calls for a more sensitive design of the questionnaire. Challenges remain in operationalising value capture in empirical studies. Depending on the data sources and the definition of value used, comparability of different empirical studies can be limited. Therefore, more research is needed to develop a standardised method to measure value capture.

Ownership and local linkages of the tourism GPN in Zambezi conservancies

Although the nation state has ultimate control over the land in Namibia, several laws give traditional authorities the rights to grant customary use rights and be responsible for land use planning (Massyn, 2007). These areas are referred to as communal lands. The Nature Conservation Amendment Act of 1996 paved the way for the creation of conservancies in Namibia. Since then, residents of communal areas have been permitted to form a common property resource management institution, the conservancy (Bollig, 2016).

To be registered as a conservancy, it is necessary to have a defined boundary and membership, a management committee, a legal constitution and a benefit distribution plan (Kavita & Saarinen, 2016). Five key compliance requirements are regularly controlled by the Ministry of Environment and Tourism (MET): the annual general meeting, elections, a benefit distribution plan, a game management and utilisation plan and an annual financial report (KMgov1).

Anyone over the age of 18 who is a Namibian citizen and lives within the boundaries of the conservancy can register as a member of the conservancy. Once a year, all members attend the annual general meeting, where the conservancy committee is elected. The staff of the conservancy management comprise a chairperson, a manager, a secretary and an enterprise officer. The enterprise officer is responsible for identifying land for tourism development, attracting investors and functioning as an interface between private enterprises and the conservancy.

Conservancies mainly generate income from contracts with professional hunters for the use of their trophy hunting quotas and from joint venture contracts with tourism companies to develop tourism facilities on their land (Snyman & Spenceley, 2019) (Figure 1). For members of the conservancies, employment at joint venture lodges and

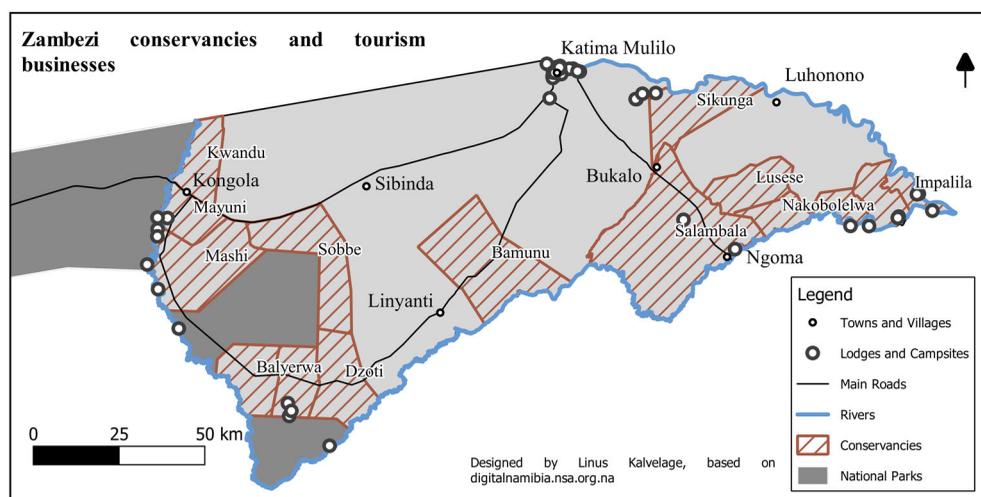


Figure 1. Zambezi conservancies and tourism enterprises. Source: Authors.

hunting camps provide income opportunities. Apart from tourism, additional revenues are realised from the sale of other natural commodities, such as devil's claw, reeds, poles and timber.

As most conservancies are formed in areas with a high presence of big game, these regional assets meet the needs of global tourism enterprises. Regional assets can be seen as pull factors for investment attraction, as Kleibert (2014) showed. Especially the more exclusive lodges with reliable connections to global tour operators are located on conservancy lands.

However, not every landscape is attractive to tourists, only 7 of the 15 conservancies were able to generate income from joint venture lodges. As they are allocated annual hunting quotas by the MET, all conservancies are involved in hunting tourism to some degree. Conservancies in the Zambezi region receive 13% of their direct income from joint venture lodges (Namibian Association of CBNRM Supporting Organisations Working Groups, 2017), while 81% is earned from hunting concessions sold to professional hunters. The remaining 6% are derived from other enterprises, such as the sale of forest products.

Ownership patterns of the tourism GPN in Zambezi

The CBNRM programme not only targeted meeting conservational requirements, but also using income generation as a catalyst for socio-economic transformation, or more explicitly, empowering formerly disadvantaged Namibians in rural areas. The ownership of enterprises is an important indicator of the value capture of regions (Henderson et al., 2002). Owners are able to retain surpluses and transfer revenues to headquarters, which can lead to the transfer of value to other spatial scales if the enterprise is foreign-owned. In Zambezi, there is a clear divide regarding the ownership of lodge enterprises. Within conservancies, foreign ownership and large enterprises are more dominant than outside of the conservancies, where the local

Table 1. Distribution and ownership of lodges in the Zambezi region.

	Owner-operated			Multinational enterprise			Total
	Foreign	Local		Foreign	Local	Other	
		Black	White				
Inside conservancies	8		2	10	0	2	22
Outside conservancies	7	10	6	1	0	1	25

Source: Authors.

participation is stronger (Table 1). As the conservancies evolve around attractive landscapes and ensure the presence of wildlife by means of conservation activities, the regional assets of these locations meet the needs of the global safari and hunting tourism industry. Thus, incoming investors choose locations within conservancies (see Table 1).

A similar observation can be made regarding the concession-holding hunting operators. In order to reward conservancies for their conservation efforts, each conservancy is granted a wildlife consumption quota based on regular aerial and game-guard counts conducted by the MET, conservancy members and supporting organisations (lod8). These quotas are then sold as concessions to professional hunters (con3). Currently, more than 400 professional hunters are registered with the Namibian Professional Hunters Association (NAPHA, ba5). The association is therefore an important voice for the political representation of the hunting industry in Namibia.

There are three different types of quotas: the guaranteed quota, the optional quota and the own-use quota (con2). The fee for the guaranteed species has to be paid even if it is not hunted, while the optional quotas only have to be paid for animals that are actually killed (ho1). Community members can also apply to shoot an animal for their own use (con10). Some of the survey respondents reported that the sale of quotas is not transparent and prone to corruption, as professional hunters try to influence decision makers in the conservancy to obtain the hunting concession (con3; ho1). The concession holder has the right to resell the quotas to other certified professional hunters, usually charging a commission fee of 10–15% (ho2). Since the concession holders have to pay the guaranteed quota fees to the conservancy, they bear the entrepreneurial risk (ho1). Most professional hunters holding hunting concessions have so far come from outside the region (con3). All hunting companies but one are based in central Namibia (Table 2); local communities lack the required skills and marketing opportunities to conduct these activities themselves (con4). To sum up, Zambezi is a resource-rich region with a low degree of local ownership in tourism.

Local linkages

In tourism research, a lively debate has evolved about local or regional economic linkages between hotels and lodges and their local environment from the viewpoint of regional development (e.g. Rylance & Spenceley, 2017). It seems clear that a lack of local linkages results in enclave tourism with a limited effect on local economic structures (Saarinen, 2017). Local linkages are a crucial factor for spill-over effects to foster local entrepreneurship and have a larger regional value capture.

Table 2. Ownership of hunting operators active in Zambezi conservancies.

Hunting operator	Headquarters	No. concessions
Eluwa Safaris	Grootfontein	1
Camelthorn Safaris	Swakopmund	1
Ondjou Safaris	Windhoek	1
Jamy Traut	n.a.	2
Thormählen & Cochran	Windhoek	1
Ngwena Big Game Hunting	n.a.	3
Vaughan Fulton	Windhoek	1
Ndumo Hunting Safaris	Katima Mulilo	3
Huntafrica Namibia Safaris	Windhoek	1
Omujeve Hunting Safaris	Windhoek	3
Caprivi Hunting Safari	n.a.	1

Source: based on NACSO data (Namibian Association of CBNRM Supporting Organisations Working Groups, 2017).

Yet larger lodges tend to strive for a high degree of autonomy. This includes possessing an autonomous power supply via diesel generators or solar panels (lod4), their own water supply (lod4), their own waste management and in-house vegetable gardens (lod2; lod4; lod9). With regard to the energy and water supply, many lodges have to have their own equipment due to their remote locations. The aim of having their own vegetable gardens is to guarantee a stable supply of fresh vegetables. Some lodges actively encourage farmers to start vegetable production, but with limited success: *'There was a guy who started a vegetable garden and in the beginning we helped him a lot. We gave him seeds, I helped him to put a water tank, pipes, I shared my water, I gave him a water pump. I gave him all of that but there is nothing there (lod8)'*.

Most lodges buy vegetables in bulk from the producers around them, if available (lod5; lod6; lod10; lod12; lod13). These transactions are not formalised and are usually conducted on a day-to-day basis. As the supply is unreliable (lod6), the lodges often have to purchase vegetables from the supermarket chains in Katima Mulilo (lod8). The supermarkets in Katima Mulilo and Kasane play an important role in the supply of beverages, meat, eggs and dairy products to the tourism sector in the region. However, supermarkets procure most food from South Africa – the impact on regional food production therefore is low (Emongor & Kirsten, 2009). In the absence of slaughter facilities, the local meat production does not meet the hygienic standards expected by the lodges: *'I cannot see myself putting a piece of steak on the table for a guest which I bought here next to the road (lod8)'*. Larger lodges rely on the services of specialised logistics firms that deliver food and beverage products directly from Windhoek to the lodge by truck and boat: *'We get certain things from Windhoek, we have our Seapride [food service distributor from Windhoek] (...) they deliver anything from cool drinks to meat to flour, those kind of things (lod12)'*.

Larger machinery, such as water pumps, is often procured directly from South Africa, while firewood, reeds and poles for the construction of buildings are bought from the surrounding communities (lod2; lod8). Lodges in the Zambezi region usually organise fishing or safari tours in-house (lod10; lod9; lod2). Cases of outsourced activities are rare (lod8): lodges located on the border with Botswana make use of Botswanan tour operators due to cross-border restrictions (lod4) and small-scale projects like so-called 'village walks' try to involve local communities.

As the lodges are often the only private enterprises in the region, they regularly receive requests for donations. The most common practice is to support communities

with transport for medical reasons or funerals or to provide funding for fuel for the patrols of the conservancies' game guards (lod4; lod5). Lodges also frequently provide financial assistance for traditional festivities or schools (lod10). In some cases, they finance the university fees of community members or help build a police station (lod5; lod13).

These findings obtained in the interviews indicate that the economic linkages to other businesses in the region are limited. Large shares of the food and beverages supply are procured either from national and global supermarket chains in Katima Mulilo and Kasane or via food delivery directly from Windhoek. The stimulative impact on local food production is therefore limited. Furthermore, there are rarely any linkages to local tour operators. Value capture due to local linkages only happens via voluntary donations and the small-scale supply of locally produced goods.

Mbaiwa (2017) describes enclave tourism as preventing 'the host populations from deriving meaningful economic benefits and access to the decision-making process on the use of resources in their local environment' (p. 17). Although the tourism sector in the Zambezi region shows some symptoms of an enclave economy, it cannot be classified as such: the conservancy structure ensures political participation and economic benefits that go beyond low-paid employment. In the following section, a more detailed view reveals conservancies' ability to capture value from tourism.

The role of conservancies in value capture

Even if value capture via local linkages and local ownership is low, conservancies ensure a transfer of value through direct payments. Furthermore, conservancies take on a variety of functions within the tourism GPN that can impact local value capture as is shown below. These functions include the production of wildlife, mediation and strategic coupling, negotiation for value capture and the use of regulatory power to improve local linkages.

Producing the commodity

The process of incorporating nature into GPNs can be understood as two opposing forces (Irrarázaval & Bustos-Gallardo, 2019): on the one hand, the biophysical composition of nature imposes obstacles to production, on the other hand, firms develop strategies to make the commodification of nature profitable. In the case of wildlife tourism in Namibia, parts of these strategies are conducted by conservancies.

By establishing conservancies, economic spaces are created that differ from their surroundings in three respects: first, the implementation of conservation measures, such as game guard patrols and anti-poaching activities, ensure the continuous reproduction of wildlife, which is the main resource for tourist activities, as the managing director of a leading NGO puts it: '*Would say wildlife is the major resource (ngo1)*' and '*... you cannot develop a thriving tourism industry in context where you don't have a resource base (ngo1)*'. Without nature conservation measures conducted by the conservancy, the habitat of wildlife would be endangered.

Second, the commodification of this resource is made possible via the coordination of conflicting interests in the area. It is a challenge for conservancies to combine hunting and safari tourism (con8). These two tourism sectors compete for the same resource: the more transcendent or more direct consumption of wildlife. Conservancies try to mitigate such challenges by designing and implementing zones of use. Maps are drawn up which assign areas to individual activities and are generally respected (lod8). Nevertheless, conflicts and mistrust between lodge owners and hunters are common because of their competing interests in the use of wildlife: *'No we understand that you need the hunting because it is also part of the tourism industry (...), but the way they are doing it, that is a conflict. (...) It's like you are sitting here with your guests having breakfast that morning and you saw the elephants the previous night crossing the river (...) and the next moment you hear 11 shots (lod8)'*. Dividing the territory into different usage zones is thus a key task for conservancies. Seven different usage zones are established: a settlement and cropping area, a multiple use area with varying priorities for livestock, hunting and tourism activities and an exclusive wildlife zone for tourism only, hunting only and no disturbance (NACSO, <http://www.nacso.org.na>).

Third, this zoning allows trophy hunting, an activity that is prohibited on communal land outside conservancies. By creating a new form of exclusive land use, space is made available for the territorialisation of the tourism GPN.

Mediation and strategic coupling

When regional assets match the needs of the GPN, a coupling process can be initiated. However, only the active promotion of these assets by regional institutions makes the coupling process strategic (Yeung, 2015). Continuous mediation between actors of the GPN at different spatial levels is needed for this coupling process. There are two ways in which conservancies act as intermediaries in the process of strategic coupling: first, by promoting their land for tourism investments and second, by facilitating land allocation for tourism investments.

The strategic coupling of conservancies generally relies on the support of NGOs and the MET. Contracts between the conservancies and tourism operators are usually negotiated in a process accompanied by additional stakeholders: since Namibia gained independence in 1990, a variety of institutions have actively promoted tourism in the Zambezi region. The initiative to foster rural development through the establishment of conservancies by the MET was led by NGOs, such as Integrated Rural Development and Nature Conservation (IRDNC), the World Wide Fund for Nature (WWF), the Millenium Challenge Account (MCA) and the Namibia Nature Foundation (NNF). These NGOs continue to play a major role in the governance of natural resources until the present day. IRDNC acts as the key contact for conservancies, supporting them in terms of professional training, legal assistance, accounting and institution building. The MET and NGOs are closely bound by a web of interchanges of personnel and joint activities (KMgov1).

The institutions mentioned above actively promote an utilisationist agenda, the commodification of wildlife and other natural resources in this narrative is the basis

for rural development. A leading official of the MET in Katima Mulilo states: *'So yes, it is for rural development, you know when you have wildlife; it has an economic value. It is not just conservation value but also economic value to the country and also to the communities on the ground (KMgov1)'*. Communities depend on investments to unlock their tourism potential, as they lack business skills (KMgov1), investment capital (KMgov1) and international networks (KMgov1; ba3) to develop their own enterprises. Investors are mainly identified with the assistance of the MET or involved NGOs (con6; con3; con1). In a few cases, investors approach the conservancy without mediation (con10).

Once an investor has been identified, conservancies mediate between the interested investors and the land-holding families (con3). In the Zambezi region, communal landholders do not own their land, but have rights of use according to customary law (Harring & Odendaal, 2002). The traditional authorities allocate land to families or individuals for different purposes (con13). These families or individuals may then sublease the land for tourism developments and receive payment in return (lod8, con4). However, land rights are not always undisputed. In several cases, various traditional authorities or families have made competing claims to land (lod4).

Conservancies act as a nexus between private investors, government stakeholders and the community (lod2). Thus, conservancies facilitate the process of land allocation for tourism purposes and simplify the leasing procedure (lod4). However, once land has been allocated, the traditional leadership at the village level must be involved to agree on the period of the leasehold (lod4). These periods range from 10 to 99 years (lod12). Once all the parties have reached an agreement, a contract is concluded and the Ministry of Environment and Tourism signs as the regulating body of the conservancies (lod11). It is therefore clear that the conservancies together with supporting institutions actively promote the strategic coupling of the region into the GPN.

Regulatory power

The conservancy acts as a regulating body, aiming to increase value capture from GPN participation by establishing a regulatory environment that strives for local employment and ensures the transfer of benefits from the tourism enterprises to the conservancy. Thus, conservancies partly take on the role of the regulator as described by Horner (2017). This is done by enforcing local employment and regular payments from tourism enterprises. Whenever a tourism company wishes to conduct activities on conservancy land, an agreement is negotiated that lays down the terms of the engagement. Contracts with hunting operators and lodges include agreements for regular payments to the conservancy. These payments are regarded as compensation for the conservation activities conducted by the conservancies and depend on the size and turnover of the company. Payments are negotiated in a market-driven bargaining process: since there are no clear regulations on the amount and the share, the distribution of value between tourism entrepreneur and conservancy depends on the conservancies' negotiating skills.

Employment in the tourism sector is often the only employment opportunity besides the government sector (lod5). Employment is generally organised by the

conservancy and is part of the agreement: *'The contract is stipulating it very clearly. All the employment should be from the conservancy unless otherwise he is looking for a qualified tour guide for example (con 12)'*.

In some cases, upgrading mechanisms are included in the agreement, such as the training of local assistant managers and hunters. Thus, a large share of local employment could be achieved, thereby enabling value capture via the payment of wages. The 27 surveyed enterprises report the local employment rate as 86%. This figure is confirmed by the interview data – lodges stated that labour was recruited from the neighbouring villages (lod2; lod5; lod8). However, employment has so far been limited to low-paid jobs such as housekeeping, reception or gardening. As the education level is usually not high in the region, the staff generally receive on-the-job training (lod2; lod4). More highly qualified vacancies, such as chefs or positions in lower management, are often filled by non-local staff (con6).

The above makes it clear that conservancies, as local institutions with regulatory power, are able to negotiate contracts with tourism investors and hunters, and to enforce local employment in the lodges, thus impacting local value capture.

Negotiation for profit

The regional capacity to negotiate a larger share of the value depends on the availability of regional assets that attract the interest of lead firms to couple with that region (Coe et al., 2004). Tourism in the region is mainly driven by the presence of big game. In the case of hunting tourism, highly valued trophy animals are the regional asset of interest. Accordingly, conservancies that have a location favourable to attract these animals achieve higher concession fees than others. Hunting operators compete for these concessions, which in return leads to a more powerful bargaining position and varying price levels among conservancies. However, negotiation skills are a factor that determines the degree of value capture.

The contract period between the conservancy and the professional hunter is between 3 and 5 years (con2), but can be terminated if the professional hunter is unable to pay the agreed price – a situation that does not appear to be uncommon (con1; con2; con9; con10). Renegotiating the contract makes it possible to adapt to current price levels. Prices depend on the negotiation skills and therefore vary between conservancies: *'you go to other places like Kasika, you discover that the price it differ with our price. There is maybe 300.000 [N\$] one elephant (con6)'*. In several conservancies, the hunting operator was changed after the end of the initial contract term due to better offers. This indicates that conservancies improve their negotiation capabilities.

A crucial factor in these negotiations are the MET and IRDNC, institutions that bundle and process information about negotiations between conservancies and hunting operators across the whole country. Thanks to the legal support of the IRDNC (lod11), the conservancies' negotiation skills improve over time, as contracts with tourism operators show: more recent contracts include higher fees and upgrading measures such as the training of community members or the transfer of assets after a certain period of time.

All in all, conservancies fulfil a variety of functions within the tourism GPN. First, they actively produce the commodity by conserving wildlife and creating the space for the anchoring of GPNs in the region. Second, conservancies form part of a network of regional institutions strategically coupling with GPNs and promoting the regional assets of the region towards global investors and third, conservancies capture value through their regulatory power. However, the ability of conservancies to couple and negotiate is limited and is dependent on supporting institutions.

The effectiveness of conservancies in capturing value

Underlining the argumentation above, financial data reveals the value capture realised by conservancies. Conclusions can be drawn about the value capture at two different levels: the conservancy management level and conservancy members as a whole. Based on the triangulation of survey data, data provided by the NTB and financial and ecological reports collected by NACSO for the year 2017 (Namibian Association of CBNRM Supporting Organisations Working Groups, 2017), a calculation can be carried out to assess the value capture of conservancies within the region.

Tourism turnover estimate

First of all, an estimate of the general turnover of tourism in the Zambezi region is needed. In the case of safari tourism, the annual turnover of the accommodation establishments (lodges, guesthouses, campsites) in 2017 serves as a starting point. In the Zambezi region, 22 establishments are to be found within conservancy territories. 17 of these are tented camps or lodges and can be perceived as more exclusive tourist destinations based on their price (over 1000 N\$ per night). Three private campsites and two campsites run by conservancies complete the picture.

In five cases, the annual turnover was available from the survey and in nine cases calculations were based on the establishments' payments to the NTB. The average turnover of these enterprises has been applied to the missing eight figures. Thus, a total of 71,541,578 N\$ (approx. 5.3 m USD, exchange rate in the following as at January 2019, 1 N\$ = 0,074 USD) is calculated, which can serve as a rough estimate of the annual turnover in the lodging sector within Zambezi conservancies (see [Figure 2](#)). However, this estimate does not include value generated by other segments of the value chain, such as tour operators, car hire and restaurants.

To obtain an estimate of the annual turnover in the hunting tourism sector, the annual value of wildlife quotas was calculated. The NACSO reports contain complete figures on the quotas allocated to each conservancy and on the quotas actually used in 2017 (Namibian Association of CBNRM Supporting Organisations Working Groups, 2017). In 2017, for example, 80 cape buffalos (*Syncerus caffer*), 35 elephants (*Loxodonta africana*) and 2 eland antelopes (*Taurotragus oryx*) were shot in the 15 conservancies. Only trophy quotas were considered and multiplied by the common prices charged by hunting operators (Ndumo Hunting Safaris, 2018).

For instance, a 14-day elephant hunting trip is sold to the customer for 48,500 USD and a 10-day buffalo hunt costs 16,500 USD. For the allocated quotas in 2017, a total

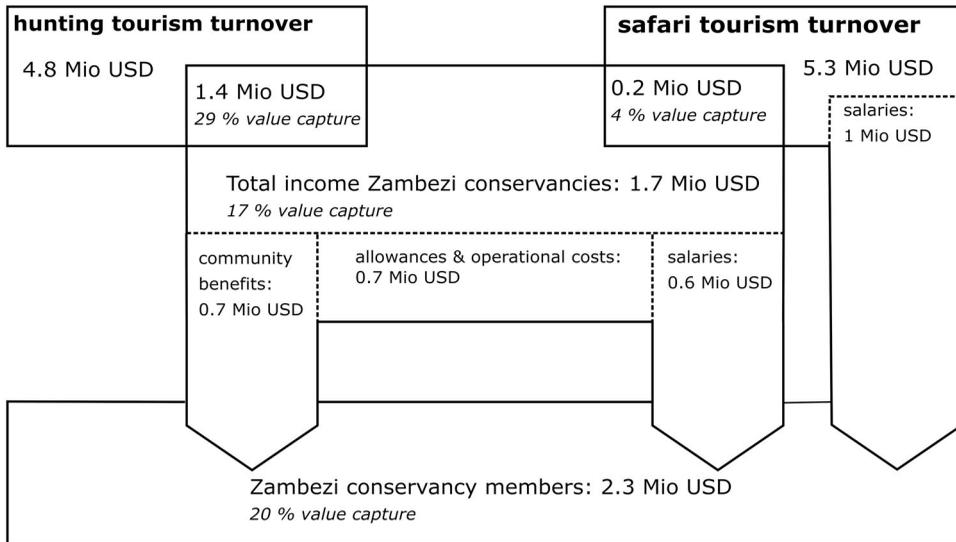


Figure 2. Value capture patterns in Zambezi conservancies. Source: Authors, inspired by Naidoo et al. (2016) and based on Namibian Association of CBNRM Supporting Organisations Working Groups (2017).

amount of 6,002,390 USD was projected, actually used trophy quotas account for 4,829,740 USD, which is 80%. These figures do not include quotas for personal use, wildlife that is brought down to provide the communities with meat. These quotas can also be sold to professional hunters, but achieve lower prices (roughly 20,000 USD per elephant). Hunting tourism and safari tourism combined generate a total turnover of 10.1 m USD.

Income, expenditure and employment

The annual fees paid to the conservancies are listed in the NACSO reports. The total yearly income of the conservancies in the region was 1.7m USD in 2017. Hunting accounts for 1.4m USD, tourism for 0.2m USD, income from other sources is 0.1 m USD. Conservancy expenditure is also clearly documented in the reports and accounts for 2 m USD (Figure 2). The gap between income and expenditure may be explained by savings that the conservancy managements carried over from previous years or financial support received from NGOs. Thus, additional costs could be covered.

As a rule of thumb, conservancies try to spend 50% of their income on operating costs and 50% is distributed among the community (con10). Conservancies follow different guidelines for expenditure: in the past, cash distribution among members was widespread and is still practised today (con1; con8). However, since cash distribution has shown limited developmental effects and the visibility of conservancies has been low (con1), conservancies are shifting more towards aggregated investments in infrastructure projects such as village electrification, water supply and road infrastructure (con1; con2; con3; con7; con10).

In 2017, running costs amounted to 1.3 m USD, consisting of 0.6 m USD for wages, 0.4 m USD for operational costs and 0.3 m USD for per diem allowances. As can be seen in [Figure 2](#), community benefits include the investment of 0.3 m USD in community development projects such as the electrification of villages, 0.4 m USD was spent on direct cash payments to members, traditional authorities, funeral assistance and human-wildlife conflict offsets. Moreover, expenses include student grants (con1; con2; con3). Only a few conservancies invest in income generation projects, such as the purchase of a tractor for rent (con2) and the development of their own campsites (con7).

A calculation of the employment effect of hunting tourism is not included, as no such data are available. However, employment in hunting tourism is usually temporary and fewer staff are needed than in the lodging sector. The employment includes the management of the hunting camp during the hunting season and hunting guides to track the animals. The distribution of meat as a community benefit is not included in this calculation either, as this is non-monetary. Meat distribution can contribute substantially to the livelihoods of the conservancy members (Naidoo et al., 2016). Another shortcoming of this calculation is that it disregards the local food and vegetable supply, which was included in the value capture analysis conducted by Rylance and Spenceley (2017). In the case of the Zambezi region, the interview results have shown that these local supply linkages are often very limited or even non-existent.

With regard to safari tourism, the employment effect inside conservancies was calculated on the basis of the total number of employees (566) derived from the business survey and multiplied by a yearly income of 25,000 N\$ (1,700 USD). The annual income is oriented towards the following monthly wages: cook 3,000–6,000 N\$, cleaner 1,500–2,000 N\$, lower management 5,000–13,000 N\$ (A11). The total amount is estimated to be equivalent to 1 m USD. Thus, 18.52% of the total turnover in Zambezi's tourism industry is spent on labour, which is in line with a study conducted in Kasane, Botswana, which estimates that 19% of turnover is used for labour costs (Rylance & Spenceley, 2017).

Conservancy value capture and elite capture

Research indicates that conservancies are prone to elite capture (Silva & Mosimane, 2014) and for the Kunene region in northwest Namibia, it was found that large shares of the conservancy income are spent on operating costs (Bollig & Menestrey Schwieger, 2014). Therefore, it is of interest to determine how much of the revenues reaches the conservancy at large and does not sink into the organisational structures of the conservancies.

From the calculations above, the relative value capture can be estimated for two different levels: the conservancy management level and the general conservancy level. For the purpose of this paper, value capture is defined as the share of the total turnover in the region that actors are able to retain. Zambezi conservancy managements are able to capture 1.4 m USD of the overall turnover from hunting tourism in Zambezi, which is 29%. For safari tourism, the figure is considerably lower, with conservancies receiving only 0.2 m USD of the total of 5.3 m USD turnover, which is equal

Table 3. Income and value capture of Zambezi conservancies. Source: own calculations based on NACSO data (Namibian Association of CBNRM Supporting Organisations Working Groups, 2017).

Conservancy	Yearly income 2017 (USD)	Income from safari tourism, % of total income	Income from hunting tourism, % of total income	Non-tourism income, % of total income	Value capture, in % of total estimated tourism turnover	Population size
Balyerwa	90,504	0	91	9	16	970
Bamunu	59,617	0	98	2	17	2310
Dzoti	83,337	0	100	0	19	1460
Impalila	57,174	23	75	2	0	880
Kabulabula	58,183	8	88	4	0	570
Kasika	96,287	29	69	2	10	1130
Kwandu	62,048	0	84	16	n.a.	3520
Lusese	60,837	0	85	15	12	880
Mashi	190,574	47	52	1	20	2210
Mayuni	112,064	35	60	5	14	2200
Nakabolelwa	43,390	0	95	5	24	705
Salambala	113,544	22	71	7	30	8240
Sikunga	43,748	0	88	12	54	2470
Sobbe	78,190	0	97	3	22	1010
Wuparo	161,270	10	86	4	29	1140
Average	87,384	16	78	6	26	1980

to 4%. All in all, conservancies capture 17% of the total tourism value created on their territories on average (Figure 2).

However, this figure cannot be equated with the amount that reaches the conservancy at large. Community benefits in the form of investment in community projects, cash benefits, funeral assistance and HWC offsets accounted for 1.3m USD in 2017. The employment effect of the lodges must be added to the conservancy member benefits, since wages reach conservancy members directly without the intervention of management. Combined with lodge wages, the money that reaches the conservancy member level accounts for 2.3m USD. Therefore, 20% of the total tourism turnover can be captured at the conservancy level. Interestingly, a study by Schnegg and Kiaka (2018) in \neq Khoadi $\|\|$ Hôas conservancy in Kunene region had similar findings.

It is clear that hunting tourism brings a greater direct benefit to conservancies, but this benefit does not reach the community in full. On the other hand, lodge operators contribute substantially less to conservancies, but the employment effect provides a greater benefit for the community. It is striking that these benefits are almost exclusively derived from the institutional capacity of conservancies to capture value, i.e. enforcing quota fees and local employment.

A large potential for value capture lies in active entrepreneurial engagement in the tourism GPN as a supplier or tour operator. Tourism entrepreneurs agree that the region still fails to fully exploit its tourism potential, although the sector has grown in recent years (lod12). Research shows that local value capture in the tourism sector in Kasane amounts to 37%, a figure that is mainly driven by the local supply of food and beverages (Rylance & Spenceley, 2017). Given that the population figure in the Zambezi conservancies is 29,695 (NACSO, <http://www.nacso.org.na>), tourism contributed to a per capita income of 77 USD in 2017 according to our calculations.

At aggregated regional level, these figures give a first indication of the ability of conservancies to capture value. However, there are variations across the different

conservancies regarding the income share derived from hunting tourism and safari tourism. Furthermore, the value capture from these activities at conservancy level differs substantially (from 10% to 54%, see [Table 3](#)). Based on GPN research, it can be assumed that these variations are partly determined by the conservancies' institutional quality and their ability to negotiate contracts with foreign enterprises. However, further research is needed to verify this hypothesis.

Conclusion

The aim of this contribution was to assess the impact of local institutions on value capture patterns in GPNs. It has been shown that conservancies can fulfil a variety of functions within the tourism GPN, including the production of the commodity, mediation in strategic coupling processes, the use of regulatory power and negotiations for value capture. Thus, conservancies act as hinges between the global economy and the local social-ecological system.

If well managed, CBNRM appears to be an effective tool for value capture from tourism GPNs and can prevent enclave tourist spaces. At the conservancy level, value capture amounts to 20% of turnover. Despite methodological challenges, calculating value capture shares can be a useful tool to ensure comparability between cases from different regions and industries. Therefore, the application of GPN analysis to CBNRM-related topics can yield new insights. The figures show that hunting tourism makes a considerable contribution to revenues in peripheral regions of southern Africa. However, local ownership and local linkages of tourism in the Zambezi region are not yet well developed and the intervention of conservancies has so far been limited to the absorption of profits, but does not increase local entrepreneurial engagement with the GPN.

These results suggest that in GPN research, it is worth including local levels of governance and non-state institutions when analysing value capture. Furthermore, GPN research on tourism benefits from including hunting tourism in order to analyse the full picture. Value capture at local level plays a significant role in GPNs that are based on natural resources such as wildlife tourism or extractive industries. As the production of these resources is location-bound, local institutions have the opportunity to bargain for profits to avoid the transfer of value to other spatial scales. According to GPN theory, it is crucial to retain value in the region to create a stimulating effect on the local economy. Therefore, tourism planners should consider to apply policies that enforce local value capture to have a larger development impact.

This analysis has two main shortcomings: first, it does not allow conclusions to be drawn regarding the benefit-sharing practices within conservancies, but remains on a meso-level. The impact of the value capture on local livelihoods is therefore unclear. Second, the results suggest that the remaining 80% of the value are not captured locally. More research is needed to analyse these two aspects and further contribute to the debate on CBNRM.

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