



Republic of Namibia  
Ministry of Environment & Tourism

STRATEGIC ENVIRONMENTAL ASSESSMENT  
OF THE TOURISM SECTOR FOR THE  
**GREATER SOSSUSVLEI – NAMIB LANDSCAPE**

2014





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2014

*ASSESSMENT DONE BY:*

**Southern African Institute for Environmental Assessment**  
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31 March 2014

*COVER PHOTO BY:*

**Namibia Protected Landscape Conservation Areas Initiative (NAM-PLACE)**

The Namibia Protected Landscape Conservation Areas Initiative (NAM-PLACE) is a five year project established by The Ministry of Environment and Tourism (MET), with co-financing from the Global Environment Facility (GEF) and with the United Nations Development Programme (UNDP) as the Implementing Agency.





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# LIST OF ACRONYMS

<b>ATTA</b>	Adventure Travel Trade Association
<b>DWA</b>	Department of Water Affairs, MAWF
<b>EIA</b>	Environmental Impact Assessment
<b>EMA</b>	Environmental Management Act
<b>EPL</b>	Exclusive Prospecting Licence
<b>GDP</b>	Gross Domestic Product
<b>GIS</b>	Geographic Information System
<b>GSVNL</b>	Greater Sossusvlei Namib Landscape
<b>ha</b>	Hectare
<b>HAN</b>	Hospitality Association of Namibia
<b>km</b>	Kilometre
<b>kV</b>	Kilovolt
<b>m</b>	Metre
<b>ML</b>	Mining Licence
<b>mm</b>	Millimetre
<b>MAWF</b>	Ministry of Agriculture, Water and Forestry
<b>MET</b>	Ministry of Environment and Tourism
<b>MLR</b>	Ministry of Lands and Resettlement
<b>MME</b>	Ministry of Mines and Energy
<b>MWTC</b>	Ministry of Works, Transport and Communication
<b>N</b>	North
<b>Nacoma</b>	Namibian Coastal Management project
<b>NDP</b>	National Development Plan
<b>NNP</b>	Namib Naukluft Park
<b>NPC</b>	National Planning Commission
<b>NTB</b>	Namibia Tourism Board
<b>NWR</b>	Namibia Wildlife Resorts
<b>S</b>	South
<b>SEA</b>	Strategic Environmental Assessment
<b>SAIEA</b>	Southern African Institute for Environmental Assessment
<b>TFCA</b>	Transfrontier Conservation Area
<b>UNESCO</b>	United Nations Education, Science and Culture Organisation

# EXECUTIVE SUMMARY

This Strategic Environmental Assessment (SEA) of the tourism sector in the Greater Sossusvlei-Namib Landscape Area (GSNLA) has two main objectives:

- To help achieve a strong and sustainable tourism industry in the landscape, which contributes to improving human quality of life on sustainable principles;
- To support the development plan of the landscape and inform future decision-making in and around the tourism sector.

Growth of the tourism sector in the GSNLA is embedded in the overall framework of policies and plans for the country and the Ministry of Environment and Tourism (MET). These are mostly supportive of the co-management approach underlying NamPlace. Projects (e.g. developing the area as a World Heritage site, maintaining International Dark Sky Reserve status) are in line with the NamPlace intention to optimise the tourism and wildlife sector. A possible conflict with the tourism sector is mineral prospecting and mining.

The Vision described for the tourism sector in the Greater Sossusvlei-Namib Landscape Area focuses on two main themes:

1. To optimise wildlife and tourism as a land use, through collaborative stakeholder engagement.
2. To create an enabling environment for growth of the tourism sector, and keep the sector competitive.

Contiguous land within the Landscape Area that is 'fence-free,' either through active removal of fences or by passively allowing breaks to remain open, now amounts to 52% of the Landscape Area.

The other main land use in this area, commercial livestock production, compares very poorly to wildlife and tourism land use in terms of its contributions to private profitability, national income, employment and local community livelihoods. The net national income contribution per hectare is estimated at N\$55 for tourism, which is 14 times higher than that for livestock at N\$4. This finding reflects the arid environment on the extreme edge of potential for livestock production, combined with the presence of attractive and iconic tourism attributes. Relatively small and strategic investments can yield significant returns.

Tourism statistics show that 'the South' attracts about 20% of all visitors to Namibia, compared to 53% for Etosha. Lodges and tented lodges are the most popular tourism accommodation, targeting mid-market tourists who travel mostly as 'self-drives'. The average occupancy rate for tourism establishments is quite low at 24% for Hardap Region.

Overall, there are sufficient beds in the landscape area to service the current tourist numbers and the desired growth in the tourism industry, and the level of satisfaction with what there is is high. The area needs to diversify the attractions and activities on offer to make visitors stay longer than the present average of just under two nights. Current activities emphasise landscape viewing with other options such as horse riding, ballooning, scenic air flights, hiking, 4x4 trails and mountain biking.

The desired high growth scenario includes the suggestions from the recently completed Tourism Development Plan for the Namib Naukluft Park, and foresees the following situation for Namibia:

- Tourist arrivals to Namibia grow substantially, led by an active marketing strategy;
- Other government ministries recognise the value of this sector and support its growth and expansion;
- Facilities cater for a wide range of tourist types (e.g. young 'adventurers', self-drives and bus tourists, business travellers);



- Information readily available at all entry points and at all major attractions, describing the county's conservation successes and attractions, in a wide range of media types (videos, CDs, cam-feeds, brochures, booklets, ..)
- Well maintained road infrastructure and flight facilities, making travelling into and within Namibia easy, safe and comfortable.

The high growth scenario envisages the following features in the Sossusvlei-Namib landscape:

- Sossusvlei is an iconic destination and is complemented with other attractions in the Namib Sand Sea, in keeping with its status as a World Heritage Site;
- Diverse activities are on offer for a full 'desert experience' which serves to hold tourists in the area for more than two-three days on average;
- A solar-powered train shuttle operates between Sesriem and Sossusvlei, transporting visitors around the area in a frequent service that does not create noise and dust, and operating from before dawn till after sunset;
- Entry facilities at Sesriem are smooth and efficient, without long delays;
- Other access points into the dunes are available, but Tsondab Valley remains a no-go, wilderness area;
- All tourism establishments strive for high ratings on the 'Eco Awards Namibia' system for minimising their environmental footprint;
- Farms within the landscape area are linked to the NNP by removal or breaching of fences, allowing wildlife populations to build up and for some high-value species such as black rhino and giraffe to be kept in the area;
- Features such as the 'Dark Sky' status achieved by NamibRand help to raise the overall attraction for the whole landscape;
- Benefits from the vibrant tourism industry are shared amongst land owners, local communities and investors.

The low growth scenario could come about as a result of a few risk factors that have a strong influence on the sector. These are:

- Vulnerability to fluctuations in the exchange rate or to further economic depression;
- Poor reliability and performance by Air Namibia;
- A combination of local factors that make the country tourist-averse, such as lack of security, harassment by locals, deteriorating infrastructure and inefficient services.

Cumulative impacts of high growth in the tourism industry on the biophysical and socio-economic environment of the GSNLA, are assessed in the report. Relatively few major negative impacts are identified. These are concerned with:

- biodiversity – particularly the abandoning of nests by lappet-faced vultures in the Tsondab area, as a result of disturbance from scenic flights;
- water quality and quantity, as a result of increasing demand on groundwater sources and the increasing risk of contamination from septic tanks, French drains etc;
- sense of place, which is jeopardised by the growing number of visitors and poorly managed facilities;
- damage to historical, archaeological and cultural sites;
- increased strain on infrastructure such as roads and waste facilities.

All of these impacts can be reduced or totally avoided through specific management interventions, which are mostly made more effective through collaboration that is encouraged and stimulated through the NamPlace concept.

Suggestions are put forward for achieving the growth that the sector, and Namibia as a whole, wants (as stated in NDP4 and various MET policy documents). These are listed according to the present constraints or opportunities that exist:

- Improved marketing. NTB has a strong role to play, and needs more private sector representation with wider and more effective outreach to South African and international targets.
- Under-investment in parks. More activities, improved environmental management at tourist establishments and in parks,

more information and in more diverse media, and greater emphasis on co-management so that park neighbours are supportive, will help to raise the tourism profile of Namibia.

- Improved infrastructure, particularly roads and internet connectivity, over the whole country and in the landscape area.
- Reliance on Air Namibia. Opening up Namibian skies to other airlines would bring in more visitors and would help to make Air Namibia more competitive and efficient.
- Poor service culture. Services in all sectors are used by travellers, and friendly and efficient service gives a good impression of a country; rude behaviour and inefficient service drives visitors away. This is especially important for key services such as immigration and customs, police and roadblocks, NWR and park staff.
- Limited understanding of the tourism sector by other government ministries. While MET is the lead ministry, all other ministries influence tourism in various ways. A major drive to raise awareness across ministries and across the county would be beneficial.
- Security needs improvement, so that tourists feel safe, have practical information to keep them that way, and are assisted efficiently when they need it.
- Activities and access areas need to be diversified. In the GSNLA, Sossusvlei is the main magnet. Others need to be opened up, and activities offered at other areas, so that visitors stay in the area longer.
- Improved efficiency in services and facilities at Sesriem and Sossusvlei. The dawn bottleneck at Sesriem gate must be prevented, and a solar-powered train shuttle to the vlei and various attractions on the way would be an iconic innovation.
- Need for good information. There is so much to tell and show about the Namib, yet so little information is available to visitors! Interesting information can be included in marketing drives, and serves as a value-adder in its own right.
- Improved environmental management can be achieved through Namibia's Eco Awards and through joint actions facilitated by the NamPlace initiative.

To conclude, there is great scope for achieving growth and expansion in the tourism sector in the Greater Sossusvlei-Namib landscape. The area is highly suited to this land use, and small strategic investments can bring major spinoffs to the local and national economy. Co-management is a useful and a necessary vehicle to help this growth, and it can greatly help in reducing the negative impacts that could happen.

### 1.1 Objectives of this SEA

This strategic environmental assessment of the tourism sector in the Greater Sossusvlei – Namib Landscape Area has two main objectives:

- To base the assessment within the premise of achieving and optimising a sustainable tourism industry, measured in terms of improving human quality of life within the principles of environmental carrying capacity and biodiversity conservation.
- To support the co-management and development plan of the landscape and guide its implementation as well as inform the future decision-making processes affecting biodiversity conservation and sustainable tourism development in the landscape.

### 2.2 SEA team

A team of Namibian professionals has undertaken the SEA, as shown below. The team was responsible for coordinating the SEA activities, supporting and communicating with the Client, facilitating public and focus group meetings, liaising with the LUP consultants and finally compiling the SEA report.

- Peter Tarr - Team Leader. He was the contact person with the Client and was involved at a technical and strategic level in the SEA.
- John Pallett led the Sossusvlei-Namib SEA and supported the rest of the team with project management and report compilation.
- Chris Brown supported the SEA for the Sossusvlei-Namib area, and provided input regarding tourism and biodiversity related issues.
- Jon Barnes advised on resource and socio-economic aspects relating to the SEA, with emphasis on tourism.
- Jackie Asheeke advised the SEA team with regards to the tourism industry, especially from a business perspective.
- Willem Odendaal advised the SEA on legal aspects of land use and natural resources management.
- Ms Gudrun Denker, as SAIEA's Office Manager, was responsible for project administration and financial management and reporting.

# CHAPTER 2

## SEA APPROACH AND METHODOLOGY

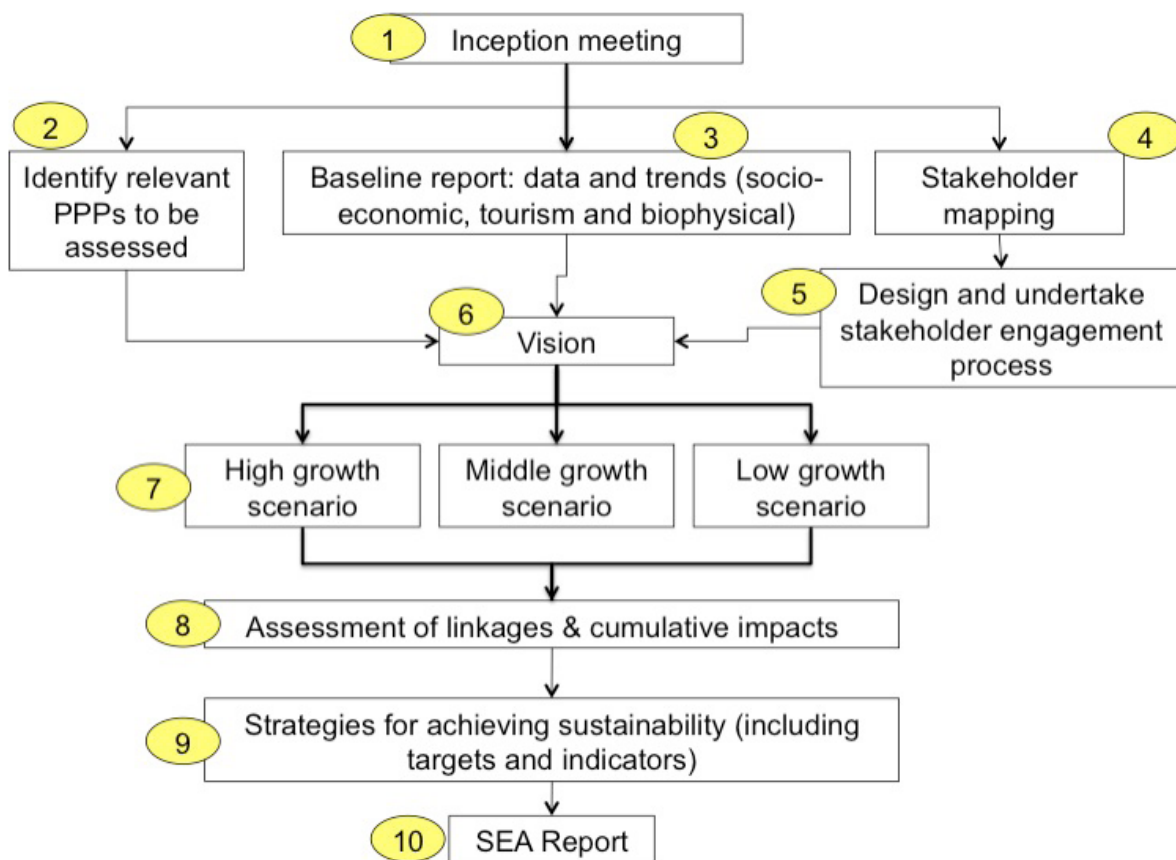
### 2.1 SEA approach

The SEA was based on the following principles :

- Forward thinking and open to ideas and suggestions;
- Transparent collaboration with the client and with stakeholders;
- Inclusion of past studies and recommendations so that, where appropriate, there is alignment with other reports;
- Simple and concise presentations to stakeholders;
- Committed to strengthening the contribution of tourism to economic development in southern Namibia and particularly the Landscape Area.

### 2.2 Methodology

The main steps during the SEA are illustrated below.



### *2.2.1 Analysis of policies, plans and programmes*

Policies, plans and programmes relevant to the Greater Sossusvlei-Namib Landscape Area and the tourism sector were reviewed so that their directives and recommendations would be carried through in our work.

### *2.2.2 Baseline situation*

Baseline information was received from a few main sources:

- The survey of farms and companies operating in the area, focussing on their tourism facilities and activities, livestock and wildlife numbers, and their approach to co-management and tourism in the area. The survey was carried out by NamPlace.
- A desk-based survey of tourist establishments, numbers, occupancies and trends carried out for the SEA. It included an analysis of business opportunities.
- A review of the economics of land uses, comparing tourism vs livestock farming. This short study was undertaken for the SEA.

These sources of information were compiled into the baseline (Chapter 4), reporting the 'business as usual' scenario.

### *2.2.3 Stakeholder mapping and consultation*

A list of all Landscape Area stakeholders was received from NamPlace. This was added to during the course of the SEA and is shown in Appendix B, where stakeholders are divided into primary, secondary and tertiary levels as follows:

- Primary stakeholders – institutions and people who have direct authority over the land and how it is used, such as MET, NWR, MLR, land owners.
- Secondary stakeholders – institutions and people who use the land or its resources, but do not have direct authority over it, such as tour operators, Roads Authority, Dept Water Affairs.
- Tertiary stakeholders – institutions and people who have an interest in the land and its resources but who are only indirectly or negligibly involved in its management. E.g. researchers, geologists, archaeologists, paleontologists, users of the water.

As far as possible the stakeholder list includes the affiliations, roles and contact details of all listed people, to facilitate communications and future information-sharing.

An information and brainstorming workshop was held with the Landscape Committee on 24 May 2013 in Windhoek. This informed the Committee about the project and how it is being conducted, and invited their inputs on the vision and key issues for the SEA. A one-day workshop focusing on the strategic assessment and the growth scenarios was held on 10 September 2013. This involved key members of the Namib and Fish River Landscape Committees, the NamPlace project team (MET), and the SEA team.

The draft SEA document was circulated to the client and all stakeholders for comment, on 2 January 2014.

This consultation process alerted interested stakeholders to the project, and allowed concrete inputs to the process.

### *2.2.4 Visioning, scenarios and assessment*

The vision for the SEA was agreed on by the Landscape Committee at the meeting in May 2013.

Elements of the high growth scenario were identified in the 10 September workshop and elaborated using the knowledge of those stakeholders familiar with the area. The low growth scenario was addressed by identifying those elements which put the sector at risk, such as fluctuating exchange rates. Activities to strengthen the sector and to reduce its vulnerability to such downturns were discussed.

### *2.2.5 Strategies for sustainability*

The workshop on 10 September focussed on the desired outcomes for the tourism sector in the Landscape Area and discussed ways to achieve these.

## **2.3 Assumptions, limitations, constraints**

This SEA project had to be extended due to delays in the baseline information from NamPlace. The extensions were granted, which allowed for full accomplishment of the project.

There were no other limitations or problems in conducting the work.

# CHAPTER 3

## POLICY AND PLANNING FRAMEWORK

The policies and plans that are relevant to the GSN Landscape Area are discussed in Table 1 below, with points of relevance shown in the second column. Key issues that influence the tourism sector are discussed in section 3.2.

### 3.1 Policies, plans and programmes relevant to the GSNLA

**Table 1: Policies, plans and programmes relevant to the GSNLA.**

Policies, plans and programmes	Relevant points
Namib Naukluft Park Management Plan (MET, 2012)	<p>The Vision for the NNP is “To develop the NNP as a world-class protected desert and coastal landscape and tourism destination that capitalises on its sand sea, remote coastline, escarpment, wilderness and scenery, and its pro-conservation neighbours, to enhance both biodiversity conservation and sustainable socio-economic development for the region and country, within a large co-managed tri-nation transboundary landscape of global renown.”</p> <p>In the Introduction, the PMP states “One of the greatest challenges with potentially the greatest rewards is to develop effective, constructive and efficient co-management mechanisms across the land- and seascapes, to optimise both the environmental (including biodiversity) and socio-economic values, while at the same time using these open systems to (a) allow the historic movement and migration patterns of wildlife in response to the highly variable climatic conditions to become re-established, (b) to mitigate and buffer the impacts of climate change and thereby make the area more resilient to change, and (c) to create incentives for neighbouring land owners and custodians to become part of this conservation landscape, thereby further strengthening the area’s contributions to socio-economic development and environmental conservation.”</p> <p>The objectives of the PMP are(briefly summarised):</p> <ul style="list-style-type: none"> <li>• To conserve the landscapes, ecosystems and biodiversity;</li> <li>• To maintain ecosystem resilience under a variable and changing climate;</li> <li>• To support appropriate land and natural resource uses that are compatible with the above;</li> <li>• To increase the contribution of the NNP to Namibia’s social and economic development;</li> <li>• To build co-management approaches;</li> <li>• To zone land uses with an emphasis on conservation and tourism, recognising the high human pressures on hyper-arid systems;</li> <li>• To link the NNP with Namibia’s other coastal parks and marine reserves.</li> </ul> <p>Specific principles and strategies are elaborated in the PMP. Those aspects relevant to the GSNLA include:</p> <ul style="list-style-type: none"> <li>• Conserving the diversity of habitats, and zonation of the Park according to environmental sensitivity;</li> <li>• Management of wildlife populations and re-introductions of historically-occurring species;</li> <li>• Water management;</li> <li>• Fencing;</li> </ul>

Policies, plans and programmes	Relevant points
	<ul style="list-style-type: none"> <li>• Human-wildlife conflict;</li> <li>• Alien species;</li> <li>• Law enforcement and crime prevention;</li> <li>• Environmental impact assessment;</li> <li>• Consumptive use of resources (eg collecting firewood, hunting);</li> <li>• Management of the archaeological and historical heritage;</li> <li>• Research;</li> <li>• Landscape-level management;</li> <li>• Relationships with Park neighbours and residents;</li> <li>• Partnerships with private sector, civil society and government;</li> <li>• Environmental education and awareness;</li> <li>• Prospecting and mining;</li> <li>• Tourism management and development;</li> <li>• Infrastructure development guidelines;</li> <li>• Waste management and pollution.</li> </ul>
<p>GSNL Strategic Collaborative Management and Development Plan (SCMDP) (2013-2018)</p>	<p>The vision of the GSNLA is “to collaboratively manage the Greater Sossusvlei-Namib Landscape to enhance ecological and biodiversity conservation and socio-economic development for the sustained benefit of the people within the Landscape and the Region.”</p> <p>Objectives of the SCMDP (summarised very briefly):</p> <ul style="list-style-type: none"> <li>• To conserve and manage biomes, landscapes, ecosystems, catchments and biodiversity of the GSN Landscape Area.</li> <li>• To manage wildlife and ecosystems for ecosystem stability</li> <li>• To promote socio-economic development</li> <li>• To promote appropriate land and natural resource uses compatible with the above;</li> <li>• To establish collaborative management partnerships</li> <li>• To harness the competitiveness of the GSNL as a model for other areas</li> <li>• To find ways to jointly market the GSNL for mutual benefit of all partners</li> <li>• To explore expansion of the GSNL.</li> </ul> <p>Management principles are elaborated, under the following headings:</p> <ul style="list-style-type: none"> <li>• Landscape management through partnership</li> <li>• Zonation plan</li> <li>• Biodiversity conservation</li> <li>• Game population management and introductions</li> <li>• Alien plants and animals</li> <li>• Fencing</li> <li>• Water management</li> <li>• Tourism management and development</li> <li>• Security and law enforcement</li> <li>• Natural resource monitoring</li> <li>• Research</li> <li>• Information and education</li> <li>• Development guidelines</li> </ul>



Policies, plans and programmes	Relevant points
Constitution of the GSN Landscape Association	<p>The Vision, Purpose and Objectives of the Association are as stated in the SCMDP.</p> <p>The membership of the Association can change, but its founding members are:</p> <ul style="list-style-type: none"> <li>• Namib Naukluft National Park, MET</li> <li>• Namib Rand Nature Reserve, Namib Rand Nature Reserve Association</li> <li>• Gondwana Namib Park, Gondwana Collection Namibia</li> <li>• Namib Naukluft Lodge</li> <li>• Kulala Wilderness Reserve, Wilderness Safaris Namibia</li> <li>• Taleni Africa Sossusvlei Reserve, Taleni Africa (Pty) Ltd</li> <li>• Agama Camp</li> <li>• Weltevrede</li> <li>• Neuhof Reserve, Bachran Properties</li> <li>• Solitaire Guest Farm</li> <li>• Pro-Namib Conservancy (Dina, Excelsior and Kumbis)</li> <li>• Neuras Estate, Na'ankuse</li> <li>• Tsondab Valley</li> </ul> <p>The powers and functions of the Association include the following:</p> <ul style="list-style-type: none"> <li>• To promote the collaborative management and development of the GSNL, based on the agreed Principles, for the mutual benefit of the members;</li> <li>• To undertake joint and collaborative actions and activities in support of the management and development of the GSNL and the Association;</li> <li>• To ensure that GSNL generates economic opportunities for the area and the country in general;</li> <li>• To promote economic empowerment of formerly disadvantaged rural Namibians and their entrance into tourism and other wildlife based industries within the area comprising the Landscape;</li> <li>• To market the GSNL initiative, its attributes, enterprises, initiatives, concepts and its participants, and to promote co-marketing and collaborative economic initiatives between members;</li> <li>• To undertake or commission monitoring, research or other forms of information collection, analysis and dissemination on the subject of collaborative management and sustainable development of land under biodiversity conservation, to help inform and improve the work of the Association, its members and partners.</li> </ul>
MET Strategic Plan 2007/8 to 2011/12	<p>MET's vision is "To be a role model in the conservation and sustainable use of biological diversity, promotion of natural resource-based livelihoods, environmental management and tourism development through innovation and partnerships, in order to contribute to rural development and economic growth."</p> <p>The MET's mission statement is "To promote biodiversity conservation in the Namibian environment through the sustainable utilisation of natural resources and tourism development for the maximum social and economic benefit of its citizens. ..."</p> <p>The Strategic Plan recognises the contribution that tourism can make to economic development. "Namibia has the potential to become one of Africa's leading travel and tourism economies over the next decade, providing a service industry complement to</p>

Policies, plans and programmes	Relevant points
	<p>mining, agriculture and fishing for economic growth and development. Tourism is a real opportunity for job creation, social cohesion and economic growth.”</p> <p>Amongst eight broad ministerial goals, the following are most relevant to NamPlace:</p> <ul style="list-style-type: none"> <li>• The tourism sector grows to become the biggest contributor to the national GDP;</li> <li>• Natural resource assets (parks, habitats and species) self-fund their maintenance and provide economic opportunities and benefits for the private sector and neighbouring communities;</li> <li>• The nation’s biodiversity, ecological processes and life support systems are rehabilitated and sustainably used by Namibians and generate global benefits.</li> </ul> <p>The Strategic Plan identifies nine Strategic Themes to give direction to the organisation’s priorities. Four are directly relevant to NamPlace; they are:</p> <ul style="list-style-type: none"> <li>• Manage protected areas, habitats and species. The MET will manage and develop protected areas, critical habitats and important plant and animal species in order to preserve biological diversity and ecosystems for use by present and future generations of Namibians to generate global benefits. A devolved approach to the management of parks will be followed with a focus on generating economic benefits.</li> <li>• Develop and support tourism. The MET will support the development of a robust tourism sector that includes private sector and community partners, and where appropriate, manage the tourism and natural resources assets under its control so that collectively this will increase the sector’s contribution to GDP through poverty reduction and increased income distribution, especially in rural areas.</li> <li>• Develop and support CBNRM. The MET will continue to use CBNRM as an economic development and empowerment tool for rural communities through the consolidation and expansion of the conservancy programme and its support mechanisms.</li> <li>• Support rural development (especially around Parks). Namibia’s protected areas provide an opportunity to stimulate local-level economic development. By actively engaging with neighbours and allowing the parks to become ‘economic engines’, MET has the opportunity to unlock the human and natural resource capital in these depressed rural areas. This will assist in poverty alleviation whilst simultaneously enhancing biodiversity conservation on a larger scale. This Strategic Theme is cross cutting and involves CBNRM, protected area management and tourism development.</li> </ul> <p>MET (2007) embraces the notion of collaborative management approaches to landscape and biodiversity conservation ... (from GSNLA MDP)</p>

Policies, plans and programmes	Relevant points
<p>The Function of the NamibRand Nature Reserve and Benefits to Members</p>	<p>“It is a fact that hyper-arid ecosystems require large open tracts of land to ensure ecological integrity and conservation success. The coalition of farms that form NRNR have achieved this by making their land available to conservation. The area now represents a viably large and contiguous conservation area that is managed holistically.”</p> <p>Strategic Goals of the NamibRand Nature Reserve</p> <p>In order to achieve the broad objectives of the Reserve, the following goals are being pursued by Reserve management.</p> <ul style="list-style-type: none"> <li>• To conserve and wisely manage the biomes, landscapes, ecosystems and biological diversity of the NamibRand Nature Reserve (NRNR) and, where necessary and feasible, to restore and rehabilitate degraded systems to their natural, productive states.</li> <li>• To manage wildlife populations and ecosystems to maintain optimal biological diversity and ecosystem stability under highly variable climatic conditions, and to reintroduce and rebuild populations of plants and animals indigenous to the area within historic times.</li> <li>• To promote and support appropriate land and natural resource uses that are compatible with points 1 and 2, with emphasis on non-consumptive uses, sustainable land management practices, low impact tourism, environmental education, awareness and outreach initiatives and research.</li> <li>• To establish strong partnerships between the various land owners, concessionaires and management of the NRNR, in order to enhance the management and ecological and socio-economic viability of the NRNR to the mutual benefit of all partners.</li> <li>• To harness the ecological, social and economic viability, sustainability and competitiveness of the NRNR as a model of private land conservation that could be replicated elsewhere.</li> <li>• To explore the further expansion of a wider pro-Namib conservation area, including the NRNR and surrounding neighbours with compatible land uses and conservation strategies.</li> <li>• To work in partnership with landowners, concessionaires, neighbours, and the Ministry of Environment and Tourism for the benefit of biodiversity conservation and socio-economic development in the pro-Namib region.</li> </ul>
<p>Hardap Integrated Regional Land Use Plan and Strategic Environmental Assessment</p>	<p>The Hardap Integrated Regional Land Use Plan demarcates a ‘Protected Area Zone’ and a ‘Tourism Zone’ which include, amongst other areas, the NNP and GSOLA. The objectives in these zones are:</p> <ul style="list-style-type: none"> <li>• To create a regional conservation area that includes the main ecologically sensitive areas, key biodiversity areas and scenic and protected areas;</li> <li>• To create wildlife corridors to ensure that free movement of migratory wildlife species; and</li> <li>• To protect the scarce resources of the region such as water, scenic landscapes and wildlife;</li> <li>• To ensure livelihood diversification into tourism and wildlife-related activities;</li> <li>• To promote the cultural and heritage of the Hardap Region, by creation of culture / heritage trails.</li> </ul>

Policies, plans and programmes	Relevant points
	<p>The assessment of this zoning and of the conservation and tourism sector in the SEA states:</p> <p>The area to the east of the Namib Naukluft Park is demarcated as a zone for game and tourism. This essentially adds to the total area under conservation management and extends inland the area for animals to migrate east-west between the Namib proper and the adjacent escarpment areas. It recognises the likely expansion of tourism activities if the nomination of the Namib Sand Sea as a World Heritage Site is approved. This zonation is supported.</p> <p>Negative environmental impacts from expansion of the tourism industry are few, while potential benefits are many. Careful management is required to help reduce the negative impacts and to prevent deterioration in this very promising sector.</p>
Namib Sand Sea World Heritage Site	<p>“The Namib Sand Sea along the African coast of the South Atlantic with its superlatively large, shifting dunes, is an outstanding example of the scenic, geomorphological, ecological and evolutionary consequences of wind-driven processes interacting with geology and biology”.</p> <p>The Namib Sand Sea is listed as a World Heritage Site based on four criteria:</p> <ul style="list-style-type: none"> <li>• It contains natural phenomena of exceptional beauty and aesthetic importance. The majestic dune-scapes are enhanced by exceptionally clear visibility, which also gives dazzling night sky views.</li> <li>• It is an outstanding example of geological and geomorphic processes. Ongoing accumulation and constant movement of dunes are clearly evident, and there is a wide diversity of dune types and other desert landforms.</li> <li>• It is an outstanding example of ecological and biological processes. Organisms in the dunes exhibit remarkable behavioural and physiological adaptations.</li> <li>• It contains significant natural habitat for conservation of biodiversity. The area demonstrates very high levels of biodiversity and endemism, more than any other known dune ecosystem, and the habitat is continuous across the full climatic gradient of the Namib.</li> <li>•</li> </ul> <p>Namibia is a signatory to the World Heritage Convention. The Convention sets out the role of States Parties in protecting and preserving their World Heritage sites. By signing the Convention, each country pledges to conserve the World Heritage sites in its territory, and to protect its national heritage.</p> <p>Sites inscribed on the World Heritage List benefit from implementation of a management plan that sets out preservation measures and monitoring mechanisms. In support of these, Convention experts offer technical training to the local site management team. Inscription of a site on the World Heritage List also brings an increase in public awareness of the site and of its outstanding values, thus increasing the tourist activities at the site. When these are well planned for and organized respecting sustainable tourism principles, they can bring important funds to the site and to the local economy.</p>

Policies, plans and programmes	Relevant points
	<p>States Parties are encouraged to integrate the protection of the cultural and natural heritage into regional planning programmes, set up staff and services at their sites, undertake scientific and technical conservation research, and adopt measures which give this heritage a function in the day-to-day life of the community. States Parties are obliged to report regularly to the World Heritage Committee on the state of conservation of their World Heritage properties. The Convention encourages States to strengthen the appreciation of the public for World Heritage properties, and to enhance their protection through educational and information programmes.</p>
NDP 4 (GRN 2012)	<p>NDP4 identifies four strategic areas as being critical for Namibia's economic development, one of which is tourism. According to the plan, Namibia aims to become the leading tourist destination in sub-Saharan Africa by 2017. This is to be achieved by increasing tourist arrivals; reducing seasonality of visitors; improving the geographic spread of attractions; and creating a conducive investment, administrative and regulatory environment. In addition, government will improve tourism marketing, and improving the management of Namibia's protected areas is also a stated priority.</p>
Policy on Tourism and Wildlife Concessions on State Land (MET, 2007)	<p>The policy recognises that concessions are a powerful mechanism to enhance tourism development and sustainable natural resource management. They can increase the economic value of Protected Areas, and contribute to economic growth through foreign currency earnings, employment creation, rural development, alleviation of poverty and addressing social inequities.</p> <p>In offering and granting concessions, MET is guided by the following objectives:</p> <ul style="list-style-type: none"> <li>• They should enhance conservation efforts;</li> <li>• They should enhance MET's ability to manage Protected Areas and associated wildlife and tourism operations;</li> <li>• They should enhance the economic value of Protected Areas and the generation of revenue from sustainable use of national assets;</li> <li>• They should promote economic empowerment of previously disadvantaged Namibians and their entrance into the tourism, hunting and wildlife sector;</li> <li>• They should be used as a means of promoting sustainable development, poverty alleviation and employment creation in protected areas and on other State land.</li> </ul> <p>Four types of concessions are considered: Tourism, plant materials, trophy hunting, and other uses of wildlife. The policy sets out the process for establishing, awarding and managing concessions, under the guidance of the Concessions Unit in MET.</p>
International Dark Sky Reserve	<p>It has been demonstrated that the NamibRand Nature Reserve has some of the darkest skies in the world. The area has successfully achieved official status as an International Dark Sky Reserve. There are no conditions or legal consequences of this status on NRNR or neighbouring properties, but practical consequences are that:</p> <ul style="list-style-type: none"> <li>• NRNR applies lighting guidelines at all its establishments and activities, to keep exterior lighting to a minimum;</li> <li>• NRNR tries to influence its neighbours to be more light-conscious and less light-pollutant;</li> <li>• Awareness-raising is led by NRNR with the intention that local and regional developments should not threaten the Dark Sky status. For instance, future shops and commerce around Sesriem, and even off-shore oil exploration (with gas flaring), could cause significant 'glows' on the horizon that would degrade the night views.</li> </ul>

## 4.1 Biophysical description

The Greater Sossusvlei-Namib Landscape Area is a large conservation and tourism area, taken up mostly by the Namib Naukluft Park to cover an area of just less than 50,000 km<sup>2</sup>. Freehold farms to the east of the NNP largely practice compatible land uses, with tourism focused on landscapes and wildlife. The information in this section is summarised from the baseline survey carried out by NamPlace in early 2013.

### 4.1.1 Farms practicing conservation and tourism

Baseline information is available from 15 organisations in the Landscape Area, that took part in the survey organised by NamPlace. They are listed in Table 2 with their main land uses.

**Table 2: Land uses of farms in the GSNLA.**

Property name	Area (ha)	Farm names	Main land use	Comments
Namib Desert Lodge	12 500	Dieprivier	Cons + Tourism 100%	
NamibRand NR	202 288	Vreemdelings Poort, Gwessiegat, Toskaan, Draaihoek, Keerweder, Wolwedans, Jagkop, Verweg, Toekoms, Saffier, Die Duine, Stelarine, Garrasis, Aandster, Springbok Vlake, Neuhof Reserve	Cons + Tourism 100%	
Kumbis + Sonop	30 000	Kumbis, Sonop	Cons + Tourism 100%	
Kulala Wildrness Safaris	40 000	Geluk, Eensaam, Witwater	Cons + Tourism 100%	2 lodges: Little Kulala and Kulala Desert Lodge
Excelsior	9 400	Excelsior	Cons + Tourism 100%	Owned by Drifters Namibia
NamNau Habitat	25 000	Abendruhe, Vito	Cons + Tourism 100%	
Taleni Africa	43 000	Oorwinning, Goedehoop, Lekker Water	Cons + Tourism 100%	Sossusvlei Lodge
Namib Sky		Geluk	Cons + Tourism 100%	Part of Wilderness Safaris property
Neuras-N'aankuse	14 000	Neuras	Cons + Trsm 30%; winery 50%; research 10%; livestock 10%	
Tsauchab R Camp	7 127	Urikos	Cons + Trsm 80%; livestock 20%	
Tsondab Valley SR	17 200	Tsondab	Cons + Tourism 100%	
Onis	5 000	Onis	Livestock 100%	
Solitaire	9 000	Solitaire	Cons + Tourism 90%; livestock 10%	
Camp Agama	4 400	Dieprivier Oost	Cons + Tourism 100%	
Weltevrede	11 600	Weltevrede	Cons + Trsm 50%; livestock 50%	



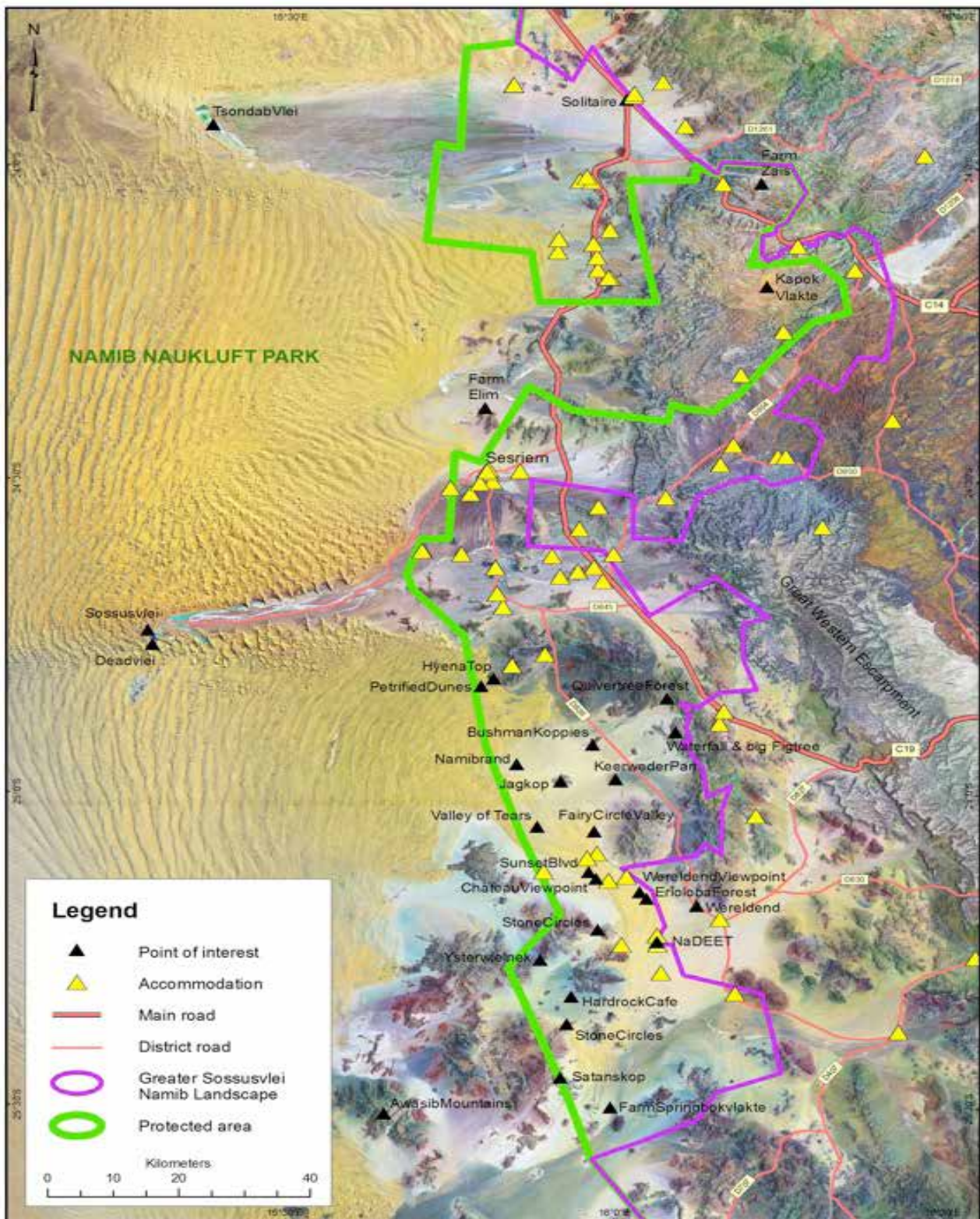


Figure 1: The Greater Sossusvlei-Namib Landscape Area.

The farms that have identified their main land use as Conservation and Tourism are mostly free of internal fences. These are farms that have actively removed fences or have passively allowed fences to be breached (such as by encroachment of dunes or by broken fences being left broken). The number of farms doing this, and the area that has thereby been 'connected' to the NNP, is shown in Table 3 and Figure 2.

**Table 3: Areas of farms in GSNLA connected to the Namib Naukluft Park**

<b>Total area of GSNLA (excluding NNP)</b>	<b>5731 km<sup>2</sup></b>
Number of farms that have actively removed barrier fences or are allowing fences to be breached	26 farms within GSNLA
6 farms outside GSNLA	
Total 32 farms	
Area of GSNLA that is now connected to NNP through removed or breached fences	Area of 26 farms = 2,988km <sup>2</sup>
Area of 6 farms = 366 km <sup>2</sup>	
Total area of 32 farms = 3,354 km <sup>2</sup>	
Percentage of GSNLA that is 'connected' to NNP	52% (26 farms)



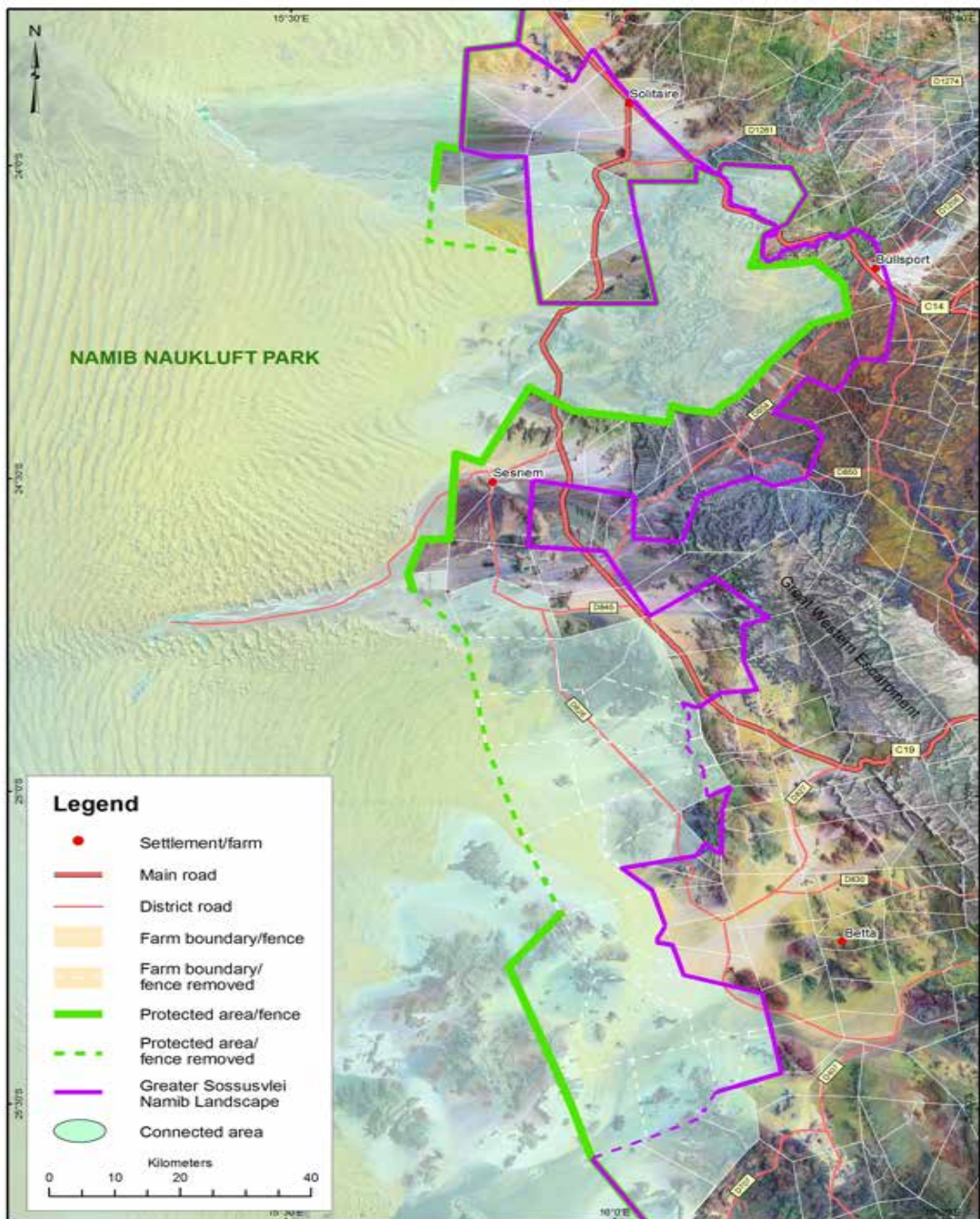


Figure 2: Areas of the Greater Sossusvlei-Namib Landscape that are connected through the removal or breaching of fences.

#### 4.1.2 Wildlife populations

Population estimates for various wildlife species were provided in the GSNLA survey data. These are tabulated below. Where numbers are given as a range, the average is used (e.g. 0-11 becomes 6) to calculate the totals in the last row.

**Table 4: Estimates of wildlife populations, compiled from the NamPlace survey data.**

	Spring bok	Gems bok	Kudu	Red Harteb	Blue Wildebe	Mtn Zebra	Plains Zebra	Steen bok	Klip springer	Wart hog	Ostrch	Giraffe	Black Rhino
Namib Desert Lodge	50-300	60-400	0-20	0-1	0-4	0-20	0-11	50-60	0	0	20-50	0-5	0
NamibRand NR	6 069	7 296	41	177	0	550	320	60	0	0	765	6	0
Kumbis + Sonop	all numbers included in NRNR figures (NRNR game count Route 11)												
Kulala Wildernss Saf	1 514	749	20	0	0	9	0	20	20	10	200	0	0
Excelsior	all numbers included in NRNR figures (NRNR game count Route 9)												
NamNau Habitat	0-700	0-600	0-40	0-1	0	0-500	0-15	20-30	0	0-10	0-200	0-3	0
Taleni Africa	500	250	30	0	0	250	0	50	20	25	100	0	0
Namib Sky	1 500	1 000	50	0	0	70	0	20	0	10	100	0	0
Neuras-N'aankuse	125	50	50-300	0	0	0-300	0	0	0	0	0	0	0
Tsauchab R Camp	350	50	150	0	0	250	0	20	20	50	10	0	0
Tsondab Valley SR	1 000	1 000	8	0		20	3	10	0	2	20	3	0
Onis	20	0	50	0	0	10	0	15	0	0	30	0	0
Solitaire													
	80	60	30	0	0	80	0	20	20	0	0	0	0
Camp Agama	300	150	30	0	0	40	0	20	30	20	0	0	0
Weltevrede	1 000	250	10	20	1	100	0	20	10	20	2	5	2
Totals	12 983	11 385	624	199	3	1 789	337	335	120	142	1 362	19	2

includes introduced stock

Springbok and gemsbok are the most numerous herbivores, and, together with ostrich, are the most important large herbivores in the Namib.

The Hartmann's mountain zebra population is recovering well as a result of protection provided under more widespread conservation management and the growing ability to move between upland and plains areas as fences come down. Recovery of veld condition and reduction of hunting in farms under conservation management have benefitted small antelopes such as klipspringer and steenbok.

The few black rhino in the Landscape Area are part of MET's custodianship programme. Further reintroductions would help to spread the country's population of this Critically Endangered species and improve the conservation status of the GSNLA, but would need to be carefully managed to avoid conflicts with other activities.

#### Predators

The GSNLA farms survey asked how frequently various predators are seen on the properties (Table 5). This gives a rough indication of presence and abundance, although obviously secretive species such as leopard are likely to be under-represented. Animals identified in the surveys as giving problems (only on a few farms, far right column) were the following:

#### **AWC-African Wild Cat | C-Cheetah | J-Jackal | L-Leopard | P-Porcupine | SH-Spotted Hyena**

**Table 5: Presence and rough approximations of abundance of predators on GSNLA farms.**

	Aard wolf	Brn Hy	Kudu	Red Harteb	Blue Wildeb	Mtn Zebra	Plains Zebra	Steen bok	Klip springr	Wart hog	Ostrch	Giraffe	Black Rhino	
ena	Spott Hy	60-400	0-20	0-1	0-4	0-20	0-11	50-60	0	0	20-50	0-5	0	
ena	Chee	7 296	41	177	0	550	320	60	0	0	765	6	0	
tah	Leo	7 296	41	177	0	550	320	60	0	0	765	6	0	
pard	Cara cal	Afri Wild Cat	Small spott Cat	Blackbackd Jackl	Bat-eared Fox	Cape Fox	Hney Badgr	Small-spott Gnet	Problem	10	200	0	0	
Animals	6 069	7 296	41	177	0	550	320	60	0	0	765	6	0	
Namib Desert Lodge	f	w	f	m	x	f	w	x	d	m	w	x	w	0
NamibRand NR	m	f	f	m	w	x	f	f	d	d	f	x	f	0
Neuhof Reserve		f	f	m	m				d	d				
Excelsior	w	f	x	f	m	m	w	f	d	d	m	x	x	0
NamNau Habitat	d	f	m	w	f	x	m	m	m	d	f	x	f	0
Taleni Africa	x	m	m	m	f	x	d	w	d	d	w	x	x	P, SH
Namib Sky	m	w	f	m	f	x	w	x	d	w	w	x	m	0
Neuras-N'aankuse	m	f	f	m	w	f	m	x	d	f	f	f	m	SH, AWC, L
Tsauchab R Camp	m	f	f	f	m	f	m	x	w	m	f	x	f	0
Tsondab Valley SR	f	f	f	m	x	f	m	f	d	w	m	x	x	0
Onis	f	x	x	x	f	f	w	w	d	x	x	x	x	J
Solitaire	m	f	f	w	f	m	w	m	d	d	w	x	w	L
Camp Agama	f	m	m	f	x	f	w	x	d	m	f	x	w	0
Weltevrede	d	f	w	m	f	x	d	w	d	d	m	x	x	C

Legend:	x	Never	0	no problems with predators
	f	Few times per year		
	m	Monthly	m	species introduced
	w	Weekly		
	d	Daily		

Snakes were identified as causing problems on some farms, although they are present in all areas and should simply be tolerated as part of the natural environment.

#### 4.1.3 Livestock

While most of the farms in the Landscape Area do not keep livestock, there are a few with substantial numbers, particularly of sheep (Table 6).

**Table 6: Numbers of livestock on GSNLA farms.**

	Cattle	Horses	Mules / Donkeys	Goats	Sheep	Pigs
Namib Desert Lodge	0	0	0	0	0	2-20
NamibRand NR	0	0	0	0	0	0
Kumbis + Sonop	0	0	0	0	0	0
Kulala Wildrness Saf	0	0	0	0	0	0
Excelsior	0	0	0	0	0	0
NamNau Habitat	0	0	0	0	0	0
Taleni Africa	0	0	0	0	0	0
Namib Sky	0	0	0	0	0	0
Neuras-N'aankuse	35	0	4	0	120	0
Tsauchab R Camp	0	0	0	0	627	0
Tsondab Valley SR	0	0	0	0	0	0
Onis	50	0	0	10	1700	0
Solitaire	340	2	2	0	0	0
Camp Agama	0	0	0	0	0	0
Weltevrede	1	0	0	0	300	0
Totals	426	2	6	10	2747	0

#### 4.1.4 Mining

There are many Exclusive Prospecting Licences (EPLs) in the landscape area, as shown in Figure 3. They are for a range of minerals, including uranium, industrial minerals, base metals and semi-precious stones.

The World Heritage status that is now granted to the Namib Sand Sea carries with it the condition, from a Cabinet decision, that there will be no mining in the proclaimed area (Seely 2012). EPLs that have been granted for mineral exploration will not be renewed, and present exploration activities are being investigated by the Ministry of Mines and Energy.



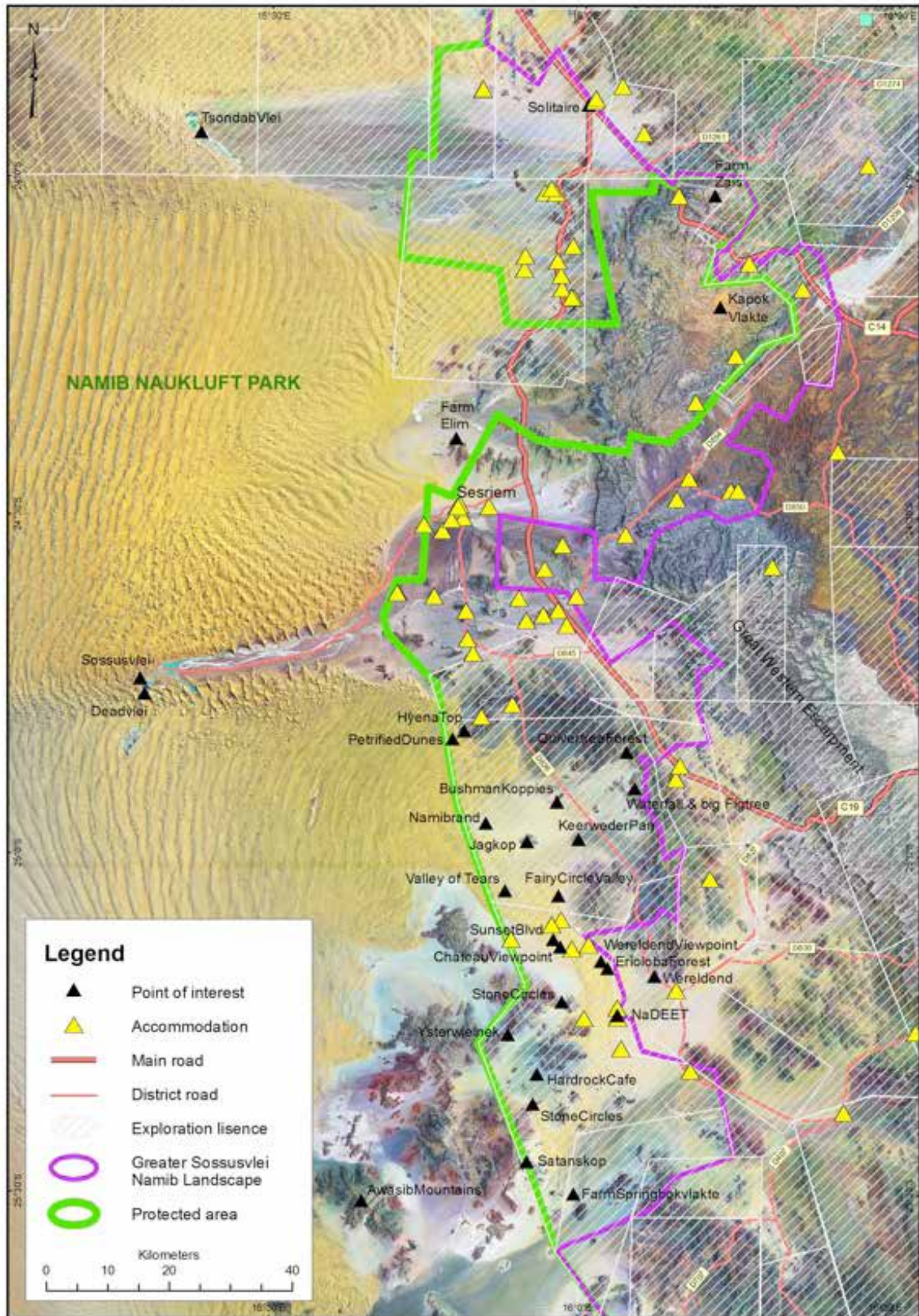


Figure 3: The Greater Sossusvlei-Namib Landscape Area and mineral Exclusive Prospecting Licences (EPLs).

## 4.2 Economics of different land uses

The land uses prevalent in the GSN Landscape have been studied in detail elsewhere in Namibia regarding their value to the national economy as well as their contribution to local and other livelihoods. Of particular note was the study by Barnes & Humavindu (2003), which was an analysis of the economic values for the primary land uses possible in the area occupied by the Gondwana Cañon Park in the Fish River Canyon area further south in Namibia. The biophysical and socio-economic setting in the Fish River Canyon area is almost identical to that of the GSN Landscape and so this work of Barnes & Humavindu (the Fish River Canyon economic study) although dated, can be considered to be directly applicable here. The approach and results are thus described briefly below. The findings have been updated to 2012, with some new data, and then extended to apply to the GSN Landscape.

### 4.2.1 *Sossusvlei - Namib economic study*

Details of the Fish River Canyon economic study can be found in the report of Barnes & Humavindu (2003). Three land uses, traditional small-scale livestock production, large-scale commercial livestock production and nature-based tourism were analysed with detailed financial and economic budget/cost-benefit models. Empirical data on the physical, and financial characteristics of these potential land uses were assembled for this. Among other things, the contributions of these activities to the national income, employment, private profitability, and local community livelihoods were measured.

The methods used for the financial and economic analysis were aimed at determining the direct use values of the land uses, as defined within the context of the “total economic value” of natural resources. The study is focused only on direct use values. The other components of total economic value - indirect use values and non-use values - include the economic value of biodiversity but have not been quantified.

Livelihoods values were measured in terms of remuneration received by households and profits received by businesses. Economic values measured the change in the national income, which, in context of the land uses studied, refers to the income received by the factors of production (labour and capital) from the sale of their services to production in the form of wages, rent and net income. It is essentially the “value added” generated in these land-use activities (total value of the goods and services produced, less raw materials and other goods and services consumed during the production process). Value added was used as a base to estimate net national income, which is gross national income less depreciation of capital.

The estimates of net national income were measured using economic prices, which reflect the costs to society, of using or producing resources. Economic prices reflect opportunity costs (the values of the resources’ best alternative use). Where financial prices differed significantly from opportunity cost, shadow pricing was applied, using the preliminary criteria used in the Environmental Economics Unit in the Ministry of Environment and Tourism (Barnes 1994; Humavindu 2008). The main shadow pricing adjustments made, were the elimination of domestic taxes and subsidies, an adjustment (up by 6%) to the value of tradable goods to reflect excess demand for foreign exchange, and an adjustment (down by 65%) to unskilled labour costs to reflect unemployment.

Cost and benefit flows were discounted over time to reflect the time value of money. For this study a discount rate of 8% was applied to both financial and economic models. In the financial enterprise models, the value of land was reflected as subsidised expenditure in rentals. In the economic analysis, land rental was treated as a domestic transfer and excluded. The economic measures of land-use value were thus made before inclusion of land opportunity costs. This allowed direct comparison between models regarding returns to land. The economic models also did not include central government expenditures in the wildlife and agricultural sectors.

The measures of gross and net national income were measures of economic efficiency. They provided an indication of the contribution of the land use to economic growth, development, and include the benefits of employment. The financial analyses resulted in profitability measures, indicating the private incentives for investment in the activity. The extent to which these



private returns differ from the economic ones indicated the influence of policy and/or market imperfections, as described by Jansen et al. (1992).

Models were detailed spreadsheets with annualised income statements and ten-year cost-benefit, investment analyses. They were developed, as representative examples of the land uses, using data from both the literature, and empirical survey. Sensitivity analysis was used to test robustness of models and assumptions, and determine the strength of conclusions to be drawn from results. All models contained wildlife or livestock herd/flock projections, incorporating birth rates, mortality rates, off-takes and purchases, within the constraint of the rangeland carrying capacities.

Table 7 shows some of these results comparing values for the two livestock production systems with nature-based tourism. In terms of both financial and economic measures, the tourism land use was some ten times more valuable. The annual financial net profit per hectare, inflated to 2012 prices, was 46 Namibia dollars (N\$) for tourism, compared with N\$0.96 and N\$1.86 for the commercial and small-scale livestock systems respectively. In terms of gross national income per hectare, the direct annual contribution of these activities, also inflated to 2012 prices, was N\$114 for tourism, N\$7.48 for commercial livestock and N\$2.38 for small-scale livestock. In terms of net national income per hectare at 2012 prices, the direct annual contributions for the same activities were, N\$92, N\$4.60 and N\$0.20 respectively.

**Table 7: Estimates for comparative financial and economic values for three land uses on arid land in the GSN Landscape, a. small-scale traditional livestock, b. large-scale commercial livestock, and c. non-consumptive tourism land uses (N\$, 2001)**

ITEM	A. LIVESTOCK SMALL-SCALE	B. LIVESTOCK LARGE-SCALE	C. TOURISM
<b>Physical values</b>			
Land available (hectares)	87 000	87 000	87 000
Land used (hectares)	52 192	52 200	87 000
Stock (LSU equivalents)	1 047	871	839
<b>Financial values*</b>			
Initial capital investment per hectare (N\$)	33	56	271
Financial turnover per hectare (N\$/annum)	4.71	15	165
Net profit per hectare (N\$/annum)	0.93	0.48	23
Financial rate of return over 10 years (FRR)	5.5%	9.8%	12.9%
<b>Economic values**</b>			
Economic gross output per hectare (N\$/annum)	5.45	16	160
Gross national income per hectare (N\$/annum)	1.19	3.74	57
Net national income per hectare (N\$/annum)	0.10	2.30	46
Economic rate of return over 10 years (ERR)	11.1%	23.1%	29.4%
Direct employment created (full-time jobs)	24	29	153

\* Measured from the perspective of the landholder

\*\* Measured from the perspective of society (contribution to national income)

Prices in 2001 prices, where N\$1 = ZAR 1 = US\$ 0.11.

Source: Barnes & Humavindu, 2003.

Barnes & Jones (2009) documented trends in livestock and wildlife numbers on private land based on available data from between 1970 and 2004. During that period, on private land, small stock numbers declined by 41%, cattle numbers declined by 49%, and huntable game numbers increased by 105%. The numbers of live game animals sold increased by 680% in the three years between 2000 and 2002, and between 1994 and 2004 the number of trophy hunting clients on private land increased by 180%. Thus overall on private land there has been a tendency for livestock to be replaced by wildlife. The financial and economic incentives for this trend were demonstrated early on by Barnes & de Jager (1996).

The results of the Fish River Canyon economic study described above confirmed these findings in the extreme, showing that

at this site tourism was able to contribute by far the most to profits, community income, economic growth and employment. They showed that in arid settings close to main tourist routes, where scenery is of high quality, and where livestock production is marginal, tourism has a very strong comparative advantage.

The results reflect very well the specific conditions in the GSN Landscape study area. These include high potential for tourism and relatively low potential for livestock production. Similar conditions occur elsewhere in southern Namibia, but they are not prevalent throughout. Thus the findings do not provide the means to determine the spatial allocation of land uses, which would maximise economic values in Namibia as a whole. For this, data giving the marginal values associated with each land use at different spatial points would be needed. Optimal allocation would occur when the marginal net benefits of the competing land uses are equal to each other.

The findings reflect the arid environment on the extreme edge of potential for livestock production, combined with the presence of attractive and iconic tourism attributes and they can be expected to apply to the whole of the GSN Landscape study area. Indeed, extensive areas along the western escarpment of the country, where scenery is attractive and interesting, where there are tourism routes or access for tourism, and where it is too arid for successful livestock production, have these attributes. Developments on such land exemplify the trend described by Barnes & Jones (2009), with dramatic growth in new tourism facilities in the last two decades.

#### 4.2.2 Current land use in the GSN Landscape

Currently, the land use in the landscape is dominated by conservation and non-consumptive tourism. The tourism establishment survey recorded 31 establishments, some of them combined under the same property/owner, with a total of 888 beds/camping berths. Most accommodation on offer is in the upper to mid market ranges. Table 8 shows this, with the numbers of beds or camping berths, average typical daily per-person rack rates, and average occupancy rates for establishments. Comparison of official data on occupancies, with data gleaned directly from actual establishments, where these are willing to supply such, commonly indicates that official data reflect under-estimation of rates.

**Table 8: The number of tourism facilities, total number of beds, average daily rack rates per person, and the percentage annual occupancy of available beds/berths in the GSN Landscape area (N\$ 2012)**

Market level	Number of facilities	Number of beds	Average rack rate (N\$)	Bed/berth occupancy (%)
Up market lodges	15	597	1,838	0.30
Mid market lodges/camps	9	190	687	0.26
Low market campsites/camps	7	101	130	0.32
Total/average	31	888	1,118	0.29

Table 9 shows 2012 estimates of some physical, financial and economic values associated with all facilities in the GSN Landscape. To arrive at these results the financial and economic results from the 2001 models on mid market tourism and commercial livestock from the Fish River Canyon economic study of Barnes & Humavindu (2003), were updated to reflect conditions in 2012. This involved inflation to 2012 prices, incorporation of some specific price adjustments, and (for the tourism model) incorporation of average occupancy rates considered to realistically reflect those expected across the GSN Landscape. Then the values for the updated tourism model were aggregated, using the numbers of beds in the study area, to arrive at 2012 values for the whole area. The values for the updated livestock model were aggregated using the roughly estimated area of land likely to be under livestock in the study area (this area has not been definitively established).

The results in Table 9 suggest that the areas under tourism land use are likely to amount to some 476,000 hectares, are likely to be generating annually a direct gross output of N\$125 million, and direct gross and net national income contributions of N\$36



million and N\$26 million, respectively. With a tourism sector value added multiplier of 1.84 (Turpie et al 2010) the total net national impact on the overall economy is likely to be some N\$48 million. The areas being used for livestock may be generating annually a direct gross output of N\$7.6 million, and direct gross and net national income contributions of some N\$1.6 million and N\$1.0 million respectively. The total net national income contribution including the commercial farming value added multiplier for livestock of 1.90 is likely to only be some N\$1.9 million.

As can be seen the economic and livelihood (financial) values for tourism are very significantly higher than those for livestock. The estimated direct net national income contribution per hectare at N\$55 is 14 times higher than that for livestock at N\$4. The disparity between the two appears to have increased since 2001, possibly reflecting current policy aimed at ensuring domestic processing of small stock, which appears to have negatively affected small stock production (Schuler et al. 2012).

**Table 9: Estimated values for tourism and livestock land uses in the GSN Landscape area, based on updated financial and economic models, and tourism/land survey data (N\$, 2012)**

Value	Tourism Estimated		Livestock Estimated	
	Per hectare	Total*	Per hectare	Total**
Area (hectares)	1	476,431	1	238,216
Stock (LSU)	0.00964	4,593	0.01001	2,385
Occupancy (%/annum)	0.41	0.41	-	-
Initial capital (N\$)	443	211,046,537	115	27,308,505
Turnover/gross output (N\$/annum)	263	125,499,622	32	7,632,640
Gross national income (N\$/annum)	76	36,274,184	6.9	1,640,990
Net national income (N\$/annum)	55	26,338,233	4.0	956,957
Jobs created	0.00176	838	0.000333	79
Wage bill (N\$/annum)	59	27,955,013	10	2,379,856
Profit (N\$/annum)	15	7,107,344	1.3	304,508
Tax (N\$/annum)	38	17,969,312	1.0	239,263

\* Based on tourism survey Asheeke J. (2013, pers. comm.)

\*\* Uncertain – based on assumption that area is half that of tourism (GSN Landscape land use survey awaited)

Although localised, for example around the GSN Landscape, the potential for tourism growth in such settings is considerable. The current low utilisation of capacity in tourism in the area (reflected in low occupancy rates) suggests that short to medium term growth in tourism values will involve increased occupancies rather than significant new developments. Table 10 shows the results of sensitivity analysis with occupancies. If the occupancy rates are increased by factors of 1.29 (to 53%) and 1.54 (to 63%), the direct annual net national income contributions will increase by factors of 1.88 and 2.61 respectively.

**Table 10: Estimated effects of potential increases in occupancy on tourism output and national income contributions in the GSN Landscape area, based on updated financial and economic models, and tourism/land survey data (N\$, 2012)**

Value	Rate %/annum	Rate %/annum	Increase Factor	Rate %/annum	Increase Factor
Occupancy	0.41	0.53	1.29	0.63	1.54
Value	Rate %/annum	Rate %/annum	Increase Factor	Rate %/annum	Increase Factor
Turnover/output	263	337	1.28	398	1.51
Gross national income	76	125	1.64	165	2.17
Net national income	55	104	1.88	144	2.61

## Conclusion

In conclusion it can be said that nature-based tourism, making use of the open spaces, exceptional scenery and wildlife resources, has very strong comparative economic advantage in the GSN Landscape. The other main possible use of land in the GSN Landscape is livestock production primarily with small stock. The aridity and issues with predators and difficult terrain make this a very poor area for livestock. Tourism economic contributions per hectare are more than ten times higher than they are for livestock. Future land use should be focused on nature based tourism development.

### 4.34 Tourism situation and trends

#### 4.3.1 Tourist preferences, accommodation, occupancy rates

'The South', as it is known, is a destination for tourists seeking wide open spaces, beautiful landscapes and the peaceful ambience of the desert. 'Rugged, soulful, vast' are the marketing brands for the South. The area is not a 'hotel,' 'urban,' 'medical' or 'shopping' holiday destination. The landscapes and vistas highlighted at Sossusvlei/Sesriem, the Namib Sand Sea and the Fish River Canyon are the focus of the South's attractions.

First-time tourists to Namibia do not usually go South initially (TASA 2013). As a general rule, repeat visitors spend time in the South beginning from their second visit or based on their length of stay. Overall, 18% of tourists interviewed for the April 2013 Exit Survey stated that they visited Sossusvlei/Sesriem, and 10% went to the Naukluft. 10% visited the 'South' as a region. By comparison, 53% visited Etosha.

The April 2013 Exit Survey tell us that the leisure tourists' average length of stay is 11 days. Germans stay 18 nights and the British stay 14 nights; overall Europeans stay about 16 nights. First-time visitors stay 16 nights on average, while second visits are 8 nights.

Those staying longer tend to go South as a part of their visit if they are traveling by road. First time visitors largely head for Etosha and spend time on the coast and then, if time allows, visit Sossusvlei.

In Namibia overall, lodges/tented lodges are most popular with holiday tourists, and only 16% of leisure guests to Namibia stay in campsites. However, most accommodation in both of the South Landscape Areas is mid-market or camping.

**Table 11: Occupancy statistics (from NTB 2012, NTB 2009)**

Total beds in Hardap Region	914
Total beds in GSNLA	580, plus 60 campsites
Hardap Region average annual occupancy rate	24%
Months of highest occupancy	July 47%, August 56%, September 32%
Month of lowest occupancy	June 17%

A list of tourism establishments in the GSNLA is provided in Appendix C.

Overall, annual average occupancy rate for Hardap Region is 24%; the national occupancy rate in December 2012 was 29% (down from 30% in 2011).

In Namibia, leisure tourists overall stay on average about 1.25 bed nights per location. However, in the Namib and Fish River Landscape Areas, the stay was closer to an average of 2 bed nights per location. The challenge therefore, is to increase that time of stay in the Landscape Areas to at least 3 bed nights by increasing/diversifying the activities offered in the area. And to create new experiences to lure a larger number of tourists to the South as a part of their holiday package.

The primary visitors to accommodation providers in the two South Landscape Areas are from South Africa, Germany, and local Namibian domestic tourists. The next largest group are from Benelux, France, Italy and the UK. The Americans, by and large are not yet getting South in significant numbers, but this could change in the medium/long term due to current marketing campaigns. Domestic tourists are 33-36% of all who occupy the accommodation in the Landscape Areas.

South African travelers largely do not use operators to book their travel; they are mostly Fully Independent Travelers (FITs) using their own cars and bringing their camping equipment and supplies with them. They prefer camping and guest farms, but do spend some bed nights in the mid/lower market accommodation facilities. They stay, on average, 9 nights in Namibia. Most of them have visited Namibia before and state that they will return again as it is a regular holiday for their families/traveling friends.

Of the South African tourists who participated in the 2012 Exit Survey, 79.4% had already visited Namibia. 38% of Germans were repeat tourists, 31% of the British and only 19% of the Americans were repeat visitors to Namibia. As most tourists staying in lodges in the Landscape Areas are South African, their preferences and traveling patterns are key to tourism growth and development of those areas.

97% of those interviewed for the Exit Survey said they enjoyed their travel to Namibia and would recommend it to others. So, we are doing something right.

#### **4.3.2 Accommodation fees, booking preferences**

Most accommodation in both of the Southern Landscape Areas is mid-market or camping.

Prior to 2008, bookings were usually done 6-18 months in advance around Namibia. Due to the global economic pressure on overseas travel, more bookings are being made 1-3 months in advance. People reduced the activities they did while on holiday to save money.

People have shifted away from booking via operators. In 2002, over 43% of the respondents used a travel agent to book their trips; now, in the 2012 exit survey, only 22% use booking agents and travel agents for their travel to Namibia.

Operators get a special room rate, which varies based on their relationship with the accommodation provider. The rates cited in this report are rack rates, which are paid by all self-bookers or FITs driving to a particular lodge.

All accommodation providers in both South Landscape Areas use the out-moded billing method of 'Per Person Sharing', (pp) for their room rates. For example, at Ai-Ais, the 2013 accommodation rates are N\$580 per person sharing, per night (pn), (= N\$1160 for two people sharing a 'double' room). But, N\$680 for a single person in a room. The Exit Survey remarkably reports that 43% of the people they interviewed were traveling alone to Namibia. Therefore, the single room rates could be in higher demand than in previous years. Namibia must shift to the single room and double room rates usual in the rest of the world.

Quoting 'N\$600 pp/pn' is a bit unclear. Most people traveling South, travel as a couple sharing a room. In effect, that room costs N\$1200 per night for that couple. The N\$600 figure is a lure, it speaks of a bit of a ruse.

Two hunting farms near the Landscape Area (Kumkum and Tirol) have a flat rate of between USD\$320 – USD\$600 per day (all inclusive room, board, ground transport during the hunt, and airport transfers, except the trophy costs and any side souvenirs). Hunts last an average of 14 days, and in April they were fully booked until mid-September!

### 4.3.3 *Seasonality*

Peak season for Namibia is generally July – September. However, for the two southern Landscape Areas, April (Easter holidays) and May also showed an increase in occupancy as the number of domestic tourists increased for this particular month (likely due to holidays). And, due to the larger percentage of SA tourists to the area, April, May, June as well as July tended to be higher occupancy rate months for this group.

The Italians arrive primarily between July and August. However, a slight increase in Italian arrivals in December and January has been recorded since 2010. This is an important trend and could be attributed to increased marketing efforts that have been carried out in Italy.

### 4.3.4 *Modes of travel*

In 2012, in Namibia as a whole, 68% of tourists arrived by road. Usage statistics from Nov 2011 – June 2012 state that the road from Sossusvlei to Maltahohe was utilized at 15%. (1,614 passenger vehicles, 274 trucks, buses and heavy vehicles).

In Namibia as a whole, 39% of leisure tourists hire cars (incl. 4x4) to get around; 6% use coaches/mini-buses via operators (15% of German tourists use coaches/mini-buses). A whopping 45% use private vehicles to get around. This figure includes the 33% of domestic tourists who, on average, book at Namibian accommodation facilities and the South African inbounds who come in with their own cars

The overland trucks are used largely by German and British tourists.

High-end accommodation users often fly, but facilities are limited in the Landscape Area. Those high-end accommodation in the landscape areas report a slack in business 2008-2012 (global economic crisis bit in origin markets of leisure high-end tourists), but seem to have more bookings for 2013. This corresponds with the air safari businesses contacted. The high cost of aviation fuel has made air safaris, jump in price by 20-30% in most cases. The exit survey and the World Bank Report conclude that '...there is relatively little use of internal air services to travel around Namibia. This is most popular amongst American tourists at 6% of those who travel to Namibia, stating that they used this mode of transport while on holiday. High-end leisure tourism Germans, British, Australians/New Zealanders, and those from the Netherlands, also noted use of internal air flights to move around Namibia. Virtually no tourists from Africa used internal private air flights to move around Namibia on holiday.

### 4.3.5 *Activities*

Game viewing is the primary activity for holiday-makers in Namibia. A breakdown of activities carried out by tourists is:

Game viewing	34%
Nature/landscape tourism	25%
hiking/trekking	06%
hunting	04%
4x4 trails	04%

bird watching	01%
adventure sports	05%
horseback riding	02%
ballooning/pleasure air flights	01%
filming/photography	01%

The quote “No Big Five down South” sums up that the South is not perceived as a game viewing destination for leisure tourists. Consequently, the other categories of activities take on more importance.

‘Rugged, soulful, vast’ are the marketing mantra for the South. Rather than ‘wildlife viewing’, it should rather be rebranded as ‘nature viewing’ or ‘landscape/vista viewing.’

Many accommodation facilities in the Landscape areas note that they do hiking, wildlife viewing, star gazing, and other activities, but some tour operators sending groups into these areas have expressed dissatisfaction with these offerings. They are highly-priced if they are an ‘extra’ (they considered anything over N\$200 as over-priced for a wildlife viewing drive), and poorly guided (unskilled tour guides without appropriate historical, geological, landscape and other information).

Food is still the most highly featured comment in the guest books (either positive or negative). People want good tasting food and are willing to pay for it.

#### 4.3.6 *Opportunities, needs*

The new Namib Sand Seas World Heritage Site is a marketing access point. However, it is unclear at this time what roads, water and electricity are available in and around the buffer zone. Tourism cannot thrive without infrastructure. GRN must invest in this in the South, to open up the potential of the area. As no construction can be done within that WHS buffer zone, the lodges/accommodation already existing on the perimeter stand to gain from any new traffic to the area due to that site. This is where the new ‘adventure travel market’ may have marketing ‘hook.’ If the ATTA participants can be lured to the area, and travel journalists taken to the area for stories, and if media/commercial and movie crews can film in that area, then there is potential for additional market exposure in the medium term for that site.

Interviews with tour operators by Asheeke noted that there is a demand for more middle-income accommodation – the N\$500-600 range. More activities or service will not necessarily bring more people – generally price is the deciding factor. This could stimulate southern African tourists into Namibia.

With more FITs, self-drivers and personal vehicle drivers, and less bus/overland heavy vehicles on the roads in the South, there is scope for more hospitality/road diner facilities next to the roads in these Landscape Areas. These would probably be downstream businesses supported by the lodges and tourism activities in the area. This growth must be coordinated environmentally with strict limits on the ‘gawdy’ approach disturbing views and the atmosphere of the area, but on the positive side they are business areas that can generate good profits if the food products and roadside services offered are sufficient.

The area can absorb more regular fuel supplies and vehicle maintenance services (such as tyre repairs, emergency road assistance stations, etc...), however, careful planning is required. The existing fuel stations have, thus far, provided enough support to road users. No operators list ‘hard to get fuel’ as a barrier to use of the Landscape Area.

There are two conservancies near the GSNLA: Huibes and //Gamaseb. Neither of them has a Joint Venture or hunting partnership with the private sector.

#### 4.3.7 *Constraints*

The market wants innovation. 60%+ of our leisure tourists have visited before. "What have you done for me lately?" is the anthem. The agents are looking to sell Namibia to a different market, but are constrained by

- 'old fashioned' accommodation,
- no internet connection in most of those landscape areas,
- questionable menus and food quality,
- long distances to drive from the main Namibian tourism icons to the South (and then back all the way to WHK, on the same road!).

Tourists regularly complain about the southern border posts of Namibia. The tourism associations must campaign with MET, Office of the Prime Minister and Home Affairs directly to make sure that the flow of cars at the border posts is efficient, proper statistics are recorded, bathrooms at border posts are clean, and staff at the posts are trained and service-oriented. If people are to be jailed or fined for expired visas, then proper legal instruments and minimum standard remand facilities must be in place (i.e., magistrates must be available at all times for payment of fees and bail hearings, police officers must be available, etc...)

Most facilities have sundowners, 'nature drives' and hiking. Complaints about lack of scope of 'guides' doing these tours have been received from some operators. NTB must focus on tour guide registration as it is currently doing. Courses and training for tour guides must be made affordable and available for existing guides. Local people should be trained-up to fill this gap.

#### 4.3.8 *Business analysis*

##### **Tourism establishments**

Existing occupancy rates are low for both the Southern Landscape Areas. In the short/medium term, new lodge and tented camp (2-4 star level) developments of less than 24 beds are not financially viable. Current data tends to indicate that new accommodation establishments that are along the same design and marketing focus of the existing establishments will only divide the existing small 'pie' further. This will probably make the smaller (under 24 beds, less-capitalized, lower profit) accommodations go out of business.

Building more 5 star developments in the area is also not advised in the short/medium term. Few in the market are asking for this. There are existing facilities that are exclusive and currently operate with lower occupancy levels (under 35% on average). Existing landing strips, elite training for staff, excellent/diverse activities and luxury accommodation facilities already exist in the area, and are sufficient to serve this small, upper market demand.

More roadside 'motel + diners' USA-style (Howard Johnsons, International House of Pancakes, Dennys, etc...) that are open 24/7/365 and serve inexpensive, full plates of tasty, basic food, can pick up road traffic exiting or entering Namibia or tourists en route to borders, Luderitz, or the Orange River as well as local Namibians in the area. It can service the campers moving around that area as well. This 'motel' accommodation is geared for one-night simple stays by weary road travelers. No luxury, just 2-3 stars and clean, safe, easy, comfortable sleep is the marketing hook (television and internet in each en suite, two double bed room!) – 20 rooms only (catch some of the buses maybe?).

There is scope for NWR to expand their Sesriem Camp, at the same time going more green and modernizing their septic system and waste removal plans. Given their tremendous occupancy rate, investment is indicated for a restaurant selling diner-style breakfasts only and serving as an internet café (open 24/7), with modern ablution blocks and laundry services, fuel stations/emergency car repair, a shop selling crafts (in an attractive, market pleasing manner) and supplies for the self-drivers and campers.

To conclude: Unless the numbers of overall tourists increase, there are sufficient beds available in the Area. The average occupancies are so low and the level of satisfaction with what is there is high. More rooms can cause a glut and drive prices down, causing those with less operating capital to close down completely.

## **Pricing**

There are often local complaints about over-pricing, and market comments calling for cheaper rates. However, according to the Exit Survey, that is not the overall opinion of accommodation prices in Namibia. People currently using the facilities and operators booking in the Landscape Areas largely feel they are getting value for money.

The 4-5 star accommodation facilities are as advertised and offer an experience of a lifetime. All is in order there. The economic crisis has pressured their occupancy levels, but that is not due to their quality of service and value-for-money experience.

There are several 2-3 star, 10-20 bed facilities within the Landscape Areas, that are over-charging. A desktop review of their services show questionable food quality offered, low quality comfort regime in the rooms, no internet, no telephones, no TV or Radio, no swimming, no room service, foam mattresses instead of spring mattresses, 1980's décor, hard towels, etc... Their low occupancy rates, half-hearted websites and invisible marketing efforts speak to the quality of their product vs. their pricing. The market will solve this problem in tough economic times. Unless they invest in their places, innovate and modernize, these few facilities within the Landscape Areas will go out of business.

## **Diversifying the attractions**

While the South is not in the market as a wildlife destination, there are interesting flora and fauna that could entice certain tourists. MET game transfer programs for qualifying lodges/guest farms should be undertaken. There is no doubt that seeing 'game' is a strong lure from all tourist source markets to any African destination.

History tours can work for another tourist day in a lodge. What historic route can be re-travelled by tourists to make the past come alive?

Concessions should be available that offer a 'nature experience' to people who don't have their own 4x4s. For instance, side-by-side quad-bikes could offer this, and they have less environmental impact and consume less fuel.

Horse-back riding is growing in popularity, though the exit survey only gives 1% of tourists using such activities while in Namibia. Still, the horse riding at the Grootberg Lodge has been received well! There is scope there, particularly in the rough 'outback' areas of the Landscape Area. Accommodation providers should consider this for 'nature viewing' rather than only in the vehicle. They should feature 'easy trails' for novice riders as well as more difficult trails for experienced riders. Riding safaris where camping one night in the bush or on the mountains can be developed.

Ballooning is well received, but pricy. The key is to have value-for-money activities. In the tight financial times of 2008-2012, the tourists still came to Namibia, but they cut their costs by cutting out the activities. It is only through increased activities that they can be enticed to stay one additional bed night in the area.

Scenic air flights are expensive, ranging from N\$1000 pp to N\$2100, depending on the aircraft used and how many people are on board. This is an activity exclusive for the up-market traveler. This will not shift without larger aircraft employed on scenic viewing safaris to load 20+ passengers on each flight and reduce the per passenger cost. Larger aircraft come with larger landing strip requirements and larger insurance coverage and more aviation fuel usage.

The mineral wealth of Namibia is a selling point. A tour that highlights not only diamonds but also the semi-precious stones

and how they are mined, polished and sold. What are the minerals in Namibia used for in manufacturing? Research is needed, but a “Minerals” tour is possible.

Innovation is needed in lodge design. People want to wake up somewhere that doesn't look exactly like where they slept in another area. Linens and curtains should be changed or updated every 5 years! Tourists commented openly that the bedding was the same from when they visited 5 years earlier. Innovation in lodge design is a must. Using local stones, using local color schemes, using historic art work or local artists, using traditional designs as inspiration for functional staff uniforms, demonstrations for the tourists of the making of traditional crafts and jewelry are all winners.

'Story-telling' is rising as a demand from the tourists on their second or third visits. They want the old ones to come by after dinner and tell a real story from their old memories. Real stories from real people, authentic, nothing made-up, is a request from the market. People love hearing the click languages and hearing an old one speak their mother tongue with a translator alongside, adds to the veracity of the experience.

Music can encourage people to stay an extra night. What twice yearly event (once in off-peak and again in peak) can be planned around cultural music or desirable South African and Namibian artists performing in the South at a 'festival' around something cultural from the people who are indigenous to that area? It takes decades for a music festival to become a specific lure for tourists on its own, but it can encourage existing tourists to spend an extra night in the Areas when these events are going on.

Geology and birding tours are popular and appeal to a price elastic market. Geologists and birders don't care about price, as long as they can see and photograph and film their rocks and birds. USA and Europe are the focus points for tourists here. Innovative outreach via birding societies and clubs with specials on Air Namibia and discounts at relevant lodges/accommodation must be offered. Experts on these subjects must be involved in designing the geo or birding product and training of local guides to handle the tourists is a must for this idea to work. It needs marketing and advertising, but again... laser gun marketing at a specific kind of tourist receptive to this; not a scatter gun effect. The potential adventure tourist may well be bored at such marketing efforts on rocks and birds. Market research is necessary.

Tourists like hiking and walking in 'the wild' as has already been mentioned. This activity is readily available at most facilities in the Landscape Area. But, the experience can be refined and expanded by focusing on high level hikes (more athletic for the 20-40 tourists – Adventure!) and something more subdued and easy, but with focus on history, flora and geology for the 41-60+ tourists. (Hikes that won't make your knees and back hurt)

NWR's Namib-Naukluft camp should be rebranded and marketed solely as a 'Hiker's Paradise.' The décor, design, food offerings, uniforms of the staff, training of the guides, and shop available at the camp should all be geared specifically for the hiker. Targeting SA, German, USA, UK and Italian hikers only, a full ad campaign to lure them specifically to Namibia, specifically to the Namib-Naukluft (and the Karas Mountain hikes noted above!) can be a new product that has legs. There are hiker's magazines, clubs, and websites all around the world. Landscape area accommodations that are struggling with less than 25% occupancy on average, should consider rebranding as a specialist lodge for a single activity, i.e., hiking. Such a thing can incorporate the nearby conservancies as well. Namibia has landscapes, vistas, vast open spaces, so let's sell that better, but using a laser gun, not a scatter gun. Focused, targeted marketing and services provided in the accommodation facilities.

Using these hiker's heaven, specific platforms and promotional gifts (discount Air Namibia flights out of Frankfurt, Cape Town or Jo'burg and Accra – connections from Atlanta in the USA!), develop and advertise the Landscape Areas as hiking meccas!

Lodges must begin modernizing facilities based on what is available technologically in that area that works. Tourists no longer want to be isolated for days on end. A 'get away from it all' experience must also allow tourists to check their emails, be in touch with friends on facebook and post their holiday blogs and photos regularly.



## Marketing

Marketing of the South using Sossusvlei, Fish River Canyon and the Namib Sand Sea as a hook is an avenue to be utilized, but will yield limited results in the short/medium term. The long road distances and extremely high cost of fly-in safaris, means that the experience of the South must be marketed with these icons as a part of an overall experience in the Landscape Area. We must shift from selling icons alone and start selling experiences in an entire area.

Innovative, diverse activities need to be planned and offered for tourists to the area. Along with well-financed and innovative branding hooks to attract more new tourists to the Landscape Area, the push must (in the short/medium term in particular) be to get people already visiting the region (particularly domestic tourists!) to stay an extra night in the Landscape Areas. To do this new, innovative, exciting activities need to be offered.

Accommodation providers in the Landscape Areas should poll their guests, staff, traditional and regional authorities and operator partners for new ideas. They must troll the internet, look at what other countries with similar landscapes are offering and develop an activity that can take up another tourist day in their lodge.

The first marketing push should be a 'laser beam', not a 'scatter gun' marketing tactic. A massive new investment programme in marketing should be financed. This should include the NTB via the existing outbound agents already sending clients to the South, local operators facilitating tourist bookings in the South, the NTB website, websites of the accommodation facilities in the Landscape Areas, and trade fairs for the SA market (Indaba!) and the German market (ITB). Also, the Italians visit the South so visits to trade fairs for that market, specific to marketing activities and lodges in the South should be considered. The existing North American Marketing Program of NTB via MCA-N should be encouraged to use their remaining 18 months to focus on steering American visitors to the South.

Karas and Hardap as regional authorities should develop tourism videos and short clips about their areas (including the wildlife attractions) for play at trade fairs, on local television and on South African television. Push to invite South Africans to 'come back to Namibia.' Offer discounts or promotional gifts for fly-ins on Air Namibia from Jo'burg and Cape Town, and gift coupons at border posts in the South where SA vehicles enter.

Other markets with possible potential include places such as Turkey or Asian countries, such as up-market Chinese travelers or Chinese bus tourists visiting Cape Town already (2 night/3 day economy package including Air Namibia air flights from Cape Town to Walvis Bay direct). While our current tourism products in Namibia as a whole are not geared for the needs/preferences of Asian travelers, it is important to note that China sends out over 100 million tourists worldwide. Even 500 Chinese tourists per year (in the off-peak season) taking a side weekend jaunt away from their South African holiday, into Namibia to visit our Landscape Areas and see Sossusvlei, the Namib Sand Sea and Fish River (SA cannot offer this experience) is a potential market source for new tourism to the Landscape Areas.

# CHAPTER 5

## VISION AND ALTERNATIVE GROWTH SCENARIOS FOR THE GSNLA

### 5.1 Vision

The Vision described for the tourism sector in the Landscape Area focusses on two main themes:

- 1. To optimise wildlife and tourism as a land use, through collaborative stakeholder engagement.**
- 2. To create an enabling environment for growth of the tourism sector, and keep the sector competitive.**

#### INFORMATION BOX: WORKING TOGETHER

"We can achieve far more if we work together as a group, than we can in isolation." This is a fundamental principle of NamPlace, and the critical ingredient is co-management.

Collaborative management helps to find agreement amongst a group of stakeholders on issues that are to their greater good. It focuses on issues that require partnership and collaboration, and should not interfere with local activities carried out by individual land-owners and farmers. Most importantly, it does not imply that people's assets and land are managed by others. The intention is to focus on a range of key economic and environmental objectives, within a realistic geographic area where this is practical, and use that as a framework for the overall development of the area.

This is illustrated in a recent issue faced by the Namib landscape committee. Occasional incidents of crime and theft occur and these are expected to increase in the landscape area as it attracts more people. In these events, police need to react quickly because it is very difficult to trace suspects once they are out of the landscape. Monitoring gates on the roads would help this purpose. On the other hand, Namibia Roads Authority would like to keep public roads as open as possible, and in principle is opposed to structures that would retard movement of vehicles. Through the NamPlace programme, monitoring gates are now being considered within the guidelines of law enforcement agencies such as the police, MET and Roads Authority, as they will help to keep the area secure and this will benefit tourism and all sectors within the landscape.

### 5.2 High growth scenario

#### 5.2.1 NNP Tourism Development Plan

The recently compiled Tourism Development Plan for the Namib Naukluft Park (MET 2013) makes suggestions for the Park and specifically the World Heritage Site, which have relevance to the whole landscape. These are:

- Create information centres at Sesriem, Swakopmund and Walvis Bay, and provide more information boards at scenic sites.
- Improve management capacity, particularly more tourism staff, especially at Sesriem and Sandwich harbour.
- Improve the facilities at the Sesriem entrance to Sossusvlei, including making it a more impressive 'gateway', smoothing the 'rush hour' process at dawn, and ensuring the situation and facilities in the expanding Sesriem settlement are in keeping with the WHS status.
- Expand tourism activities in the Sand Sea around the Walvis Bay hub to accommodate tourists to the coast who don't venture all the way to the Sesriem – Sossus area.

- Expand tourism concessions in the NNP. Much of the report elaborates on how and where these should be organised.

They are not discussed here, except to note that the suggested concessions into the Tsondab valley for guided walks, horse-riding and 4x4 trips conflict with the NNP Management Plan (MET 2009), and are not endorsed by this SEA.

These suggestions are included in the high growth scenario described below.

### 5.2.2 *GSNLA tourism in a high growth scenario*

The following conditions listed below characterise the scenario of high growth in the tourism sector. They are broadly separated into national-level and landscape-level attributes.

- 
- Total tourist arrivals into Namibia are on an increasing trend through active international marketing by organisations such as NTB. The marketing strategy capitalises on Namibia's key features such as good infrastructure, impressive desert landscapes and wildlife, and friendly people and efficient service.
- All ministries in Government recognise the overall benefits to the whole economy from tourism, so that policies and programmes in the various sectors do not undermine or jeopardise tourism. Rather, Government policies and programmes are sympathetic and encouraging to the tourism sector.
- Activities are on offer for the full range of tourist 'types', such as young and adventurous, mature bus-travellers, business travel. The Namibian tourism sector as a whole, including the GSNLA and other Landscape Areas, are attentive to these foreigners who require the appropriate services and have large spending potential.
- Posters and brochure information on the attractions in the South are visible and readily available at all border posts in the south, as well as at the main national entry-points such as Hosea Kutako Airport.
- Gravel roads within the GSNLA and connecting it to Namibia's other main centres are well maintained all year round. Grading and blading of gravel roads pays particular attention to road damage during the rainy season and during the tourism peaks (Easter, June - October).
- The South African tourist market is well linked with Namibia, offering not only wildlife but also desert and landscape attractions that are not featured in South Africa. It is well recognised that the facilities are within easy reach just one short flight away from Cape Town or Johannesburg, and that the rugged desert and an outstanding World Heritage Site are significant attractions.
- Keetmanshoop and Walvis Bay airports are opened for international arrivals and departures to lure people towards the Namib, and a few places within the Landscape Area allow tourist fly-ins from other Namibian airports. Aviation fuel is readily available at these airports and airstrips.
- Sossusvlei has a reputation as an iconic destination which is complimented by other facilities focussed on the Namib Sand Sea as a World Heritage Site. At the same time, international obligations to maintain the area's original values are fully met, and are not threatened by the increased tourism growth that is experienced.
- Diverse outdoor and adventure activities are offered in the Sand Sea and at tourist establishments in the Landscape Area. These contribute to a 'desert experience' which serves to hold tourists in the area for a few days.
- A train shuttle is established from Sesriem to Sossusvlei with stop-offs at various scenic points on a circular route.
- This service replaces the current vehicle shuttles and private cars, so that noise and dust problems are prevented. The service operates from before dawn to after sunset, and is frequent, regular and reliable so that it is an enjoyable part of the Sossus experience.
- Entry and exit arrangements at the Sesriem gateway run efficiently so that there is little delay for visitors who want to get to Sossusvlei. Automatic vending machines (like the 'pay-on-departure' tickets at the Hosea Kutako parking area) are installed and operate efficiently.
- Accommodation facilities and services such as a clinic, school, police station etc that are required at Sesriem, are planned and established in a coordinated fashion in keeping with the World Heritage status of the site.
- Concession arrangements are set up so that activities that require greater management (e.g. 4x4 drives, quadbike tours,

ballooning) are available for tourists. These unlock the potential which lies particularly in the NNP. The concessions help to spread the economic benefits of the sector to others who do not necessarily own land or assets in the Landscape Area.

- Facilities offering interesting information, refreshments, and clean washrooms, are offered at Sesriem and one or two other carefully selected entry points into the Sand Sea.
- The Tsondab valley and vlei retain their status as Highly Sensitive (as stated in the NNP Management Plan [MET 2009]) and are not opened for tourism access.
- Information about the Namib is readily available at all tourism establishments and facilities. This tells the stories of the antiquity of the dunes, their interesting fauna and flora, fairy circles, water-wise adaptations and the importance of fog, and the cultural heritage. Posters, maps, brochures and books are available, as well as electronic media such as DVDs and web-cams at wildlife hot-spots.
- The Naukluft Mountains offer various activities that complement those in the Sand Sea. The fresh streams in its valleys and the mountainous terrain are ideal for hiking and camping, and can support activities such as 4x4 trails, mule packing and horse trails, mountain biking, birding, . . .
- IT and 4G web services are well established across most of the Landscape Area, so that tourists have easy access to social and business networks as desired.
- Tourism establishments within the Landscape Area are all rated on the Eco-Awards system, and they actively strive to improve their environmental management to achieve high Eco-Award ratings. Waste management systems in particular cause little environmental and aesthetic harm, and there are working projects for recycling wastes.
- Fences and barriers to wildlife movements are largely removed within the Landscape Area so that wildlife populations can grow and are less vulnerable to climate variabilities. Both diversity and abundance of wildlife are restored to what was known from the area historically.
- High-value and iconic animals (e.g. giraffe, black rhino) are re-introduced into the Landscape Area and their numbers built up more widely.
- The status of NamibRand Nature Reserve as an International Dark Sky Reserve is respected through other developments in the Landscape Area being careful with night lighting. Through this collaborative measure, the Dark Sky status is extended more widely in the GSNLA.
- The main road from Walvis Bay – Sesriem and further south is upgraded to bitumen-standard, facilitating vehicle access to the Landscape Area.
- Benefits from the growth in tourism flow to local communities, particularly through employment and training opportunities, services they provide (e.g. guiding, cultural demonstrations).

### 5.3 Medium growth scenario

This is described in the Baseline Description in Chapter 4.

### 5.4 Low growth scenario

There are a few factors that can (or presently do) jeopardise Namibia's success as a tourism destination. These threaten achievement of the high growth scenario, and could even jeopardise continuation of the present-day successes of the sector, both country-wide and in the Landscape Area.

- Vulnerability to exchange rate fluctuations or a worldwide economic downturn. Tourism depends on people having disposable income which is strongly influenced by the economic environment. Weakening US dollar and Euro rates translate into diminished spending power of overseas tourists, and reduced numbers of foreign travellers overall.
- Dependence on Air Namibia. Air-travelling visitors to Namibia depend on a handful of flight companies, with Air Namibia and SAA being the largest. Air Namibia has a poor record with unexpected overseas schedule changes, high prices and cancelled flights, which all impact the tourism sector negatively. Hosea Kutako Airport and other airports in the country need to be opened up to encourage entry by other air carriers so that this dependence on a single unreliable carrier is reduced.
- A combination of factors which make a country tourist-averse or tourist-friendly. Factors such as petty theft and lack of personal security, harassment by children and/or beggars, and impolite service in shops and banks, all add up to tourists having a negative perception of their visit to a country. Conversely, a country can build up a very positive image to tourists if these factors are actively prevented in an open, friendly society.

# CHAPTER 6

## CUMULATIVE IMPACTS

The cumulative impacts of the high growth scenario on ten key elements of the biophysical and socio-economic environment are described below.

### 6.1.1 Biodiversity and ecological functioning

The intention to open up the landscape to allow opportunistic movements of wildlife is already having a positive impact on animal numbers, as shown in the baseline (Section 4.1.2). As barriers to movements are removed, this positive trend will continue. East-west movements of animals such as springbok and gemsbok, and smaller scale movements in response to patchy falls of rain, allow the animals to respond to varying conditions as they are adapted to do. This in turn allows population growth, but occasional reductions in numbers such as during long droughts will still be expected. Such fluctuations are normal and should not trigger short-term management interventions.

Ecological functioning is expected to improve under the 'fence-free' initiative and the overall landscape approach. Both abundance and diversity of animals and plants are expected to increase. Predators such as cheetah and brown hyena are indicators of overall health of the system, since their presence verifies that essential resources for lower levels of the food web are intact.

Species that occurred in the overall area historically, such as red hartebeest and plains zebra, are now getting re-established. Specific predators such as lion and African wild dog are exceptions. But it is not intended to re-introduce these species, as they would pose problems to both the tourism and livestock activities that occur here. (The last African wild dog in this area was shot on NamibRand in 1976, when the farm was still used for livestock.)

Almost all farms in the Landscape Area that stated conservation and tourism as their main land uses, reported no problems with predators. Some of the farms running livestock listed problems with predators, such as spotted hyena, black-backed jackal, African wild cat and leopard. Livestock farmers are likely to continue to experience such predator problems, although mitigation activities (such as kraaling at night, use of predator-deterring dogs) can reduce the severity of the problem. Thus the growing number of predators is not rated as a negative impact.

The number of lappet-faced vulture active nests in the Tsondab Valley has declined over the past 10 years as a result of disturbance, most probably from aerial scenic flights (Simmons & Brown In prep.). This negative impact is significant as the species is classified as Vulnerable in Namibia and globally, and the central Namib nesting birds make up about a quarter of Namibia's total population of this species.

To summarise: impacts on biodiversity and ecological functioning from growth of the tourism sector are mostly positive, but there are a few significant negative impacts. The latter can be mitigated through appropriate management (such as tighter controls on flights in the Landscape Area, and support for predator-friendly activities of livestock farmers).



### **INFORMATION BOX: HANDS OFF TSONDAB!**

If this SEA is suggesting that parts of the Namib Naukluft Park other than Sossusvlei should be opened for tourism activities, should we consider Tsondabvlei and the valley that leads towards it as an obvious option? The answer is a firm NO.

This is because Tsondab is rated in the Management Plan for the Namib-Naukluft Park (MET 2011) as an area of conservation priority and high environmental sensitivity. This zonation extends over the wide valley leading towards the vlei from the eastern boundary of the park, as well as the adjacent dune and plain areas to the west of the vlei. The zonation allows no or only minimal mechanised access, no permanent structures and no overnighting, setting the area aside for sensitive and low-impact non-intrusive study.

What makes the area so special?

The path of the Tsondab River has created a valley of flat sandy and gravel plains extending into the dune sea. Although it holds water only very rarely, the wide valley forms a linear oasis penetrating deep into the sand sea, with its large camelthorn trees providing a corridor for savanna species.

This is a stronghold for lappet-faced vultures (*Aegypius tracheliotus*), a Red Data species classified as Vulnerable in Namibia, and globally rated as Vulnerable because of extinctions in Israel and parts of North Africa, and a declining population across southern Africa generally (Simmons and Brown in prep.). Namibia holds about 50% of the southern African population of this bird, with an estimated 500 pairs, of which about a quarter breed in the NNP. Namibia thus has a special responsibility to the conservation of this bird, but there has been a decline of at least 10% in the Namibian population over the last ~20 years.

This bird is a desert and dry savanna specialist, which builds large nests at the top of tall trees found in drainage lines on the Namib plains. The Tsondab River had a very high density of nests but this concentration has been halved over the past ~15 years, most probably due to disturbance from aircraft. Special attention needs to be paid to causing absolutely no disturbance near nesting sites – including passing vehicular and aircraft traffic and people on foot – within 2 km of any active vulture nest. Poisoning is the main cause of the overall decline, together with shooting, drowning in farm reservoirs, and disturbance at nests. The central Namib has a strong role to play in protecting this species.

#### **6.1.2 Rangeland health and soils**

Land use that is driven by conservation and tourism principles is unlikely to cause significant negative impacts on rangeland health and soils. In fact, activities that diversify away from livestock farming, so that farmers have other income options and are not 'forced' to overstock, will likely lead to improved rangeland health. Soil erosion by water or wind, and loss of soil fertility, are also unlikely impacts under conditions of high growth in the tourism sector.

Overall, impacts on rangeland health and soils from growth of the tourism sector are expected to be negligible.

#### **6.1.3 Water and hydrological functioning**

Impacts on water resources could arise from:

- Abstraction of groundwater for tourism establishments and by high numbers of visitors
- Contamination of groundwater, especially from septic tanks and French drains

Establishments that answered the survey mostly described septic tanks and French drain sewage systems, some with evaporation ponds, a few with trickle filters which treat used water and allow some re-use of the grey water for gardens. The predominance of French drain soak-aways does increase the risk of contaminating groundwater, but no incidents of this nature have been recorded.

Overall there is some negative impact on water resources from increased tourism, but its extent is difficult to assess. The absence of any warning signs – such as rapidly dropping groundwater levels or water quality problems – might indicate that the significance of the problem is low. It must be borne in mind that most of the recent growth in the tourism industry over the last 15 years has been in a period of generally above-average rains, thus possibly hiding any early warning signs in water quantity or quality.

Regardless of whether there are problems or not, there are a few actions that are suggested to improve the long-term use of groundwater. Lodge managers might feel that they need to fully use all recycled water, for instance by putting it onto gardens or expanding the area under lawns. Rather, the principle should be to ‘borrow water’ by putting as much as possible back into the groundwater, after using and cleaning it. Artificial recharge is an area of expertise that Namibia is pioneering, and it would benefit the sector to promote it and make visitors aware of this enviro-friendly practice.

#### **6.1.4 *Air quality and noise***

Tourism establishments and facilities are unlikely to create any significant air pollution. But dust levels are known to be a nuisance in the early morning ‘rush hour’ of vehicles towards the Sesriem gate into Sossusvlei. Upgrading of this road to a bitumen surface, like the road down the Tsauchaib valley within the NNP, would overall be very beneficial (but will obviously require project-specific mitigations).

#### **6.1.5 *Landscape beauty and sense of place***

There is always a risk of degrading a place’s natural beauty when levels of tourists rise. The desert experiences which visitors come to enjoy, including solitude, wilderness and silence, are jeopardised by the very tourists who come there. This is a fairly significant negative impact, which can threaten visitor numbers.

The impact can be prevented or reduced through improved management at popular tourism sites. For instance, the noisy and dusty car park at Sossusvlei could become vehicle-free and much quieter if the suggestion of a circular train route is implemented. Also, opening up access to other places in the dunes, would take some of the pressure off Sossusvlei. There are a few places where there is a combination of dunes, inselbergs and/or pans close to a main gravel road e.g. near Farm Elim, Kwessiegat on NamibRand, and north of Solitaire (out of the GSNLA).

Overall the impact on sense of place from the high growth scenario is negative, but with a strong possibility to reduce or mitigate this to a far less severe impact through careful planning and management of the growth points.

#### **6.1.6 *Livelihoods and employment***

As shown in the economics section of this report (4.2), tourism employs many more people, and offers opportunities for getting into Namibia’s economic sector, to a far greater extent than commercial or communal livestock farming. Tourism economic contributions per hectare are more than ten times higher than they are for livestock. The high-growth scenario will help to achieve these returns, with a strong positive impact on local livelihoods and employment.

#### **6.1.7 *Human health***

Improved livelihoods translates to improved health of local families and community members. Also, expanded facilities at

Sesriem, as the main growth point of the World Heritage Site, include a clinic, thereby bringing health care closer to rural residents.

There are no particular health risks or accident scenarios that are likely to grow as a result of high tourism growth. Therefore overall there is a positive cumulative impact.

### **6.1.8 Cultural heritage and social cohesion**

The area contains archaeological and historical heritage assets that are appreciated and valued by local communities and visitors. For instance, the Naukluft area contains significant rock art as well as a number of archaeological sites and surface remains of pastoral settlements (QRS 2012). There is also a concentration of battlefield sites around the Naukluft Mountains, which relate to actions in the early 1900s in the campaign against Hendrik Witbooi.

While these sites have a higher level of protection than others because they are in a national park, they are also subject to potentially higher visitor numbers and to impacts from road and accommodation facilities. If properly protected and managed appropriately, they are a potential visitor asset, adding more value to the tourism experience. However, if neglected, this opportunity would be lost, together with loss or reduction of the academic and cultural value of the sites.

Growth of the tourism market in the landscape area definitely does risk damaging and degrading the historical and archaeological sites, but the environmental assessment process should prevent this, so long as EIAs are thorough. However, EIAs are often rushed or carried out as a paper exercise, leading to environmental damage. The conclusion therefore is that heritage resources are likely to be negatively impacted, but this can be prevented or reduced if the landowner takes an active interest in preserving these assets and/or using them to add value to the land.

Social cohesion refers to the network or fabric of society: does high tourism growth help to maintain family bonds, build education and skill levels, minimise problems around alcoholism, sexually transmitted diseases, crime? Or is the impact negative, pushing these indicators downwards?

Traditional values do tend to get eroded when people move into a cash economy, and when traditional societies interact commercially with western ones. There are both positive and negative impacts; and it is usually a subjective opinion on whether the outcome is 'good' or otherwise.

### **6.1.9 Infrastructure**

Growth of the tourism sector will cause there to be more demand on infrastructure services such as road, energy, water supply and communications. Are these services to existing residents compromised, as a result of the tourism growth? In some cases, yes. Certain key gravel roads will get more 'hammered', and waste problems (such as litter, greater numbers of small landfills) are likely to grow.

These negative impacts are rated as low to medium in significance. They can be reduced or avoided by improved management, especially by adopting a collaborative landscape-level approach.

### **6.1.10 Economic development**

The economics of the tourism sector are shown to be overwhelmingly positive in Section 4.2 of this report.

In this part of the country, there are few other options for gaining economic value from the land. Livestock farming has been shown to be very marginal. Mining interests might be more profitable in the short term, and depending on the size and

location, would likely cause some negative impacts on the tourism sector. Giving up the option to mine is probably the only significant opportunity cost that the tourism sector carries.

### 6.1.11 Summary of cumulative impacts of the high growth scenario

**Table 12: Summary of cumulative impacts**

Criterion	Cumulative impact	Commentary
Biodiversity and ecological functioning	Mostly positive as fence-free areas grow	
	Potential negative impact - Problems with predators experienced by livestock farmers.	Can be reduced through pro-active farming measures
	Strong negative impact- Lappet-faced vulture nests easily disturbed, number of active nests has declined considerably.	Requires strict control of scenic flights
Rangeland health and soils	Neutral to positive impact as the pressure to make a profit from very marginal livestock practices declines.	
Water and hydrological functioning	Possible (probable?) negative impacts from over-abstraction of water by tourism establishments and contamination of groundwater by sewage systems.	Requires further investigation.
Air quality and noise	Minor negative impact from dust as a 'nuisance factor' along roads leading to the main Sossusvlei attraction.	
Landscape beauty and sense of place	Medium negative impact by tourism degrading the desert experience that visitors come to enjoy.	Negative impacts can be greatly reduced by: <ul style="list-style-type: none"> <li>• Efficient management to make the tourism experience pleasant.</li> <li>• Increased and diversified activities so that crowds are dispersed and there is less interference on each other.</li> <li>• Opening up more access points into the Sand Sea.</li> </ul>
Livelihoods and employment	Strong positive impact	
Human health	Positive impact arising from improved livelihoods and more accessible health facilities.	
Cultural heritage and social cohesion	Likely negative impacts on heritage sites such as rock art, historic sites. Positive or negative impacts on traditional values and social fabric – depending on your point of view.	Management controls can reduce damage to cultural, historic and archaeological resources, and help them to add value to the tourism experience.
Infrastructure	Low to medium negative impact.	Solutions to problems (such as roads needing more upkeep, litter getting more prevalent) can be more easily resolved by collaborative management.
Economic development	Overall strong positive impact.	

# CHAPTER 7

## STRATEGIES FOR SUSTAINABILITY

Discussions amongst the client and stakeholders invited to the workshop on 10 September produced the following list of issues and suggested actions to move the Landscape towards achieving the high-growth scenario. The issues are separated into national- and local (landscape) levels.

### 7.1 National level issues and strategies

#### 7.1.1 Poor marketing of Namibia

Desired outcome: Increased number of middle- and upper- market tourists visit Namibia.

Constraint or opportunity	Suggested strategic actions
Lack of up-to-date marketing vision	<ul style="list-style-type: none"> <li>Establish a national Tourism Council with strong private sector representation</li> <li>Restructure NTB board representation towards private sector</li> <li>Work with recognised southern African marketing leaders in field to develop and maintain vision that is current and updated</li> </ul>
Lack of innovative plan of action	<ul style="list-style-type: none"> <li>Turn above vision into a strategic plan with higher level outcome targets and indicators</li> <li>Turn strategic plan into an annual work plan with output targets and indicators</li> <li>NTB board to monitor implementation of strategic and annual work plans against respective targets and indicators, and create operational environment of accountability</li> </ul>
Marketing does not capitalize on Namibia's great success stories, positive changes and fascinating history, cultures and natural environment	<ul style="list-style-type: none"> <li>Link marketing specialists with Namibia's successful programmes and institutions – tell the exciting success stories about Namibia</li> <li>Orientate foreign affairs staff – particularly in embassies and high commissions – with tourism and country marketing, set pro-active outreach programme and targets, and monitor performance</li> </ul>
Current resources not being used efficiently	<ul style="list-style-type: none"> <li>NTB board to prioritise activities in strategic and annual work plans that will deliver best national marketing outcomes and to allocate resources accordingly</li> <li>NTB board to make effective use of monitoring, audits, cost-benefit analyses and other tools to ensure optimal efficiency</li> </ul>

#### 7.1.2 Under-investment in Landscape Parks (Ai-Ais & Namib-Naukluft)

Constraint or opportunity	Suggested strategic actions
Develop tourism activities and services (not accommodation) to enhance visitor opportunities and experiences	<ul style="list-style-type: none"> <li>Develop an "Activities Service Centre" with web site (or linked to an existing web site) in each landscape to facilitate, support and provide for the suite of activities which tourists might wish to undertake, e.g. mountain biking, hiking, 4x4 trails, guided quad bike trails, birding, botany, geology, astronomy, river rafting, fly fishing.</li> <li>Tourism is rapidly changing. People now visit different areas not primarily to stay at lodges for the bed and food, but rather for the activities they can do and the experiences and stories they can learn about. The lodges then become the support services to the activities, experiences and stories. This is an important mind-shift that the tourism and lodge sectors need to understand.</li> </ul>

Constraint or opportunity	Suggested strategic actions
<p>Improve natural resource and environmental management in parks</p>	<ul style="list-style-type: none"> <li>• Tourists are far better informed about environmental issues than ever before. They notice poor levels of environmental management, e.g. alien vegetation, wasteful use of water and energy, poor solid waste management, light pollution. All establishments should undertake eco awards Namibia assessments and strive to achieve at least 3 flowers. This is particularly important for facilities within national parks, which should set the benchmark, as they are in the highest designated conservation areas.</li> <li>• Similarly, park management and development should be a priority for investment. Economic assessments have shown that investing in parks and their management brings high returns. Each park should have an effective Management &amp; Development Plan with budget and annual work plans with targets and indicators which are implemented efficiently, monitored and managed in an operational environment of accountability.</li> </ul>
<p>Improve information provided in parks</p>	<ul style="list-style-type: none"> <li>• The provision of information meets a number of needs. At the primary level it assists people plan and run their lives, e.g. accommodation facilities, routes, activities that may be undertaken, park rules. At the secondary level it provides information on the area, e.g. the landscape, land uses, geology, wildlife, cultures. And at the tertiary level it provides stories – the inspiration, excitement, stimulation that people need and which they take away and remember. To date information has focused on the first two levels. However, the third level of information is the most important. These two landscapes have many, many fascinating and inspirational stories that could be told.</li> <li>• A more innovative, disbursed and story-based approach to the provision of information must be developed throughout the landscapes.</li> </ul>
<p>Strengthen links to neighbours and strengthen co-management approaches</p>	<ul style="list-style-type: none"> <li>• One of the greatest threats to park biodiversity and management is their becoming isolated with hostile neighbours. Conservation efforts in Namibia over the past 25 years have resulted in a change from &lt;10% to &gt;70% in friendly neighbours on park borders, practicing compatible land uses. This allows park staff to shift their activities from largely negative border protection to positive park-and-biodiversity management. It also opens up huge opportunities of extending the conservation initiatives in the park to neighbouring areas, to improve biodiversity conservation at a landscape level, to increase the economic performance of land under indigenous biodiversity production systems and, most important, to elevate levels of capacity through partnership. This concept needs to be fully embraced by the parks &amp; wildlife department at all levels and they need to provide leadership to realize the many benefits inherent therein.</li> <li>• The parks &amp; wildlife department needs to actively engage with park neighbours as set out in their park management plans and in the landscape strategic collaborative management and development plans, and to make tangible commitments to joint programmes, not just to those components that benefit parks and activities on park lands.</li> </ul>



### Information box: Rewarding best practice with Eco Awards



Most visitors to Namibia expect a high quality, nature-centred experience. Consequently, the tourism sector is largely dependent upon healthy wildlife populations, panoramic scenery and litter-free, wide open, natural spaces. Like all other economic activities, tourism uses resources, produces waste and creates environmental and social impacts. As these impacts accumulate they can result in the degeneration of tourist sites and natural settings, and are capable of destroying the very foundation upon which the tourism industry thrives.

The Eco-awards system encourages tourism establishments to keep a high standard of environmental care and reduce their negative impacts. Like a 'five-star' hotel, a high desert flower rating is a mark of distinction that the establishment is planned and managed according to eco-friendly principles. At the same time, the lodge can improve its profitability, often with very little additional expenditure.

Eco-Awards Namibia reward best practice in the tourism industry through the following benefits:

- There is a growing interest amongst international travellers for sustainable destinations. International tour operators use the website to select such destinations for their clients;
- Members get exposure in the international arena through the African Alliance for Sustainable Tourism Certification and the Global Sustainable Tourism Certification organisations;
- Using the Good Practices Handbook, members get guidance on how to manage their establishments more effectively, with advice and suggestions on aspects such as recycling, value addition, energy saving, water saving, even staff development.

The principle is 'Do well by doing good' - save on the use of resources, and save money at the same time.

So far, 10 tourism establishments in the Sossusvlei-Namib Landscape Area have Eco Award ratings. These rewards could be within reach for all the establishments in the Landscape, should they whole-heartedly embrace the Eco Award system and principles

### 7.1.3 *Inadequate infrastructure and related services*

Desired outcome: Roads and communications – particularly internet – are of high quality.

Constraint or opportunity	Suggested strategic actions
Roads to key attractions at and in parks in landscapes should be upgraded to high quality to allow easy, safe access by 2x4 vehicles	<ul style="list-style-type: none"> <li>The growth in tourism in Namibia over the past 20 years, and the change in tourism from mainly bus groups to mainly self-drive, means that road infrastructure is now a critical component of the future growth and success in tourism. Currently, road infrastructure for tourism is not given due consideration by the MWTC and Roads Authority because they do not see tourism as a major economic activity, because tourism is not reflected in the public accounts. However, GRN is now aware that tourism is one of the top three economic performance sectors in Namibia. It is also the sector with the greatest sustainable potential. It is listed as one of four key investment areas in NDP4. As such there should be active and ongoing work between MET, MWTC &amp; Roads Authority to ensure that roads to key tourism areas are built and maintained to appropriate quality to ensure that tourism growth is not held back. This discussion and planning must also involve the private sector in tourism, including the car hire firms.</li> </ul>
Internet connectivity should be upgraded to the fastest available, at and around all key tourism destinations in both landscapes	<ul style="list-style-type: none"> <li>In the past, isolation was considered a positive attribute to travelling to remote areas such as lodges in Namibia. Today this is no longer the case for most visitors. People from industrialised economies manage their lives on their smart-phones and other electronic devices. They communicate, do their banking, check their stock markets, plan their next activities, call up reference material, etc electronically. They also make decisions about where they will go on holiday based on fast and hassle-free internet services. It is therefore important that fast cellphone and internet services are available in and around all key tourism centres. As such there should be active and ongoing work between MET and the various cell and internet service providers to ensure that these services are provided to appropriate quality and speed at all key tourism areas. This discussion and planning must involve the tourism private sector.</li> </ul>

### 7.1.4 *Windhoek airport insufficiently serviced by international airlines*

Desired outcome: More international airlines stop at Windhoek, carry more tourists and reduce risk.

Constraint or opportunity	Suggested strategic actions
<p>Namibia is over-reliant on Air Namibia which is a high risk to the sector. There is a need to open our skies to other airlines with two mutually supportive strategies: make Windhoek</p> <p>(i) the preferred final destination for international airlines into southern Africa, and</p> <p>(ii) an attractive stop-off destination en route to Jhb &amp; Cape Town</p>	<ul style="list-style-type: none"> <li>The only logical rationale for heavily subsidizing the long-haul component of Air Namibia is to ensure that the country is serviced by long-haul flights for tourism and business purposes. If another, more effective means could be implemented to ensure this connectivity that would be of great value. One way of achieving this is to (a) open up the Namibian skies to all airlines, and (b) get rid of all airport charges. This would make Namibia the cheapest destination in southern Africa and would result in many airlines making it either their destination of choice or a stop-off location when going on to JHB or CT. This would ensure that Namibia was well served by a number of international airlines, reducing the current high risk. It would also boost tourism to Namibia. And further, it would eliminate the need for Air Namibia's loss-making long-haul flights and allow the airline to concentrate on its more viable Namibian and African routes. A detailed study should be initiated to investigate the viability and risks associated with this suggested alternative.</li> </ul>

### 7.1.5 Poor service culture

Desired outcome: Namibians generally, and especially those who interface with tourists, become more hospitable and service-oriented.

Constraint or opportunity	Suggested strategic actions
<p>There is a widespread conceptual misunderstanding that “service” is the same as “servitude”. This misunderstanding needs to be addressed at the national level across society</p>	<ul style="list-style-type: none"> <li>• Because of Namibia’s unfortunate colonial and apartheid history many people are understandably very sensitive to the issue of providing services to others, often under the mistaken belief that providing a good service is the same as servitude – i.e. being dominated by a person. This is not so. Providing a good service is simply doing a job well. Failure to understand this leads to poor service delivery. It also results in visitors getting the impression that Namibians are inefficient, indifferent and disinterested.</li> <li>• This misconception needs to be addressed at the national level, not only within the tourism sector but across society. An internal national tourism awareness programme should be designed by NTB.</li> </ul>

Constraint or opportunity	Suggested strategic actions
<p>All authorities need to be aware of their role in promoting hospitality and the image of Namibia. For example, municipalities and local authorities should ensure that tourists are not subjected to continuous begging</p>	<ul style="list-style-type: none"> <li>• Namibia should strive, in a pro-active manner, to become a tourism-friendly destination by ensuring that all ministries and parastatals, at all levels, are aware of their role in promoting and supporting tourism, and also adopt a tourism-friendly culture, face and outreach.</li> <li>• A focused workshop involving the tourism sector, under the auspices of the Directorate of Tourism in MET, should look at the roles and potential activities of each relevant agency, followed up with meetings with those agencies. If the whole of government does not rally around national development priority areas there is little point in producing NDPs. These priority areas will not develop themselves. Indeed, tourism development in Namibia has been taken forward to this point largely by the private sector. It has now reached the ceiling of where it can go without strong, constructive government engagement on policy issues to remove barriers. This requires cross-sectoral collaboration, pro-active planning and decisive implementation.</li> <li>• Some examples of the types of interventions needed to turn tourism into a national initiative: <ul style="list-style-type: none"> <li>» Roads authority – ensure that main tourism routes are well maintained, particularly by the start of the tourism season and that routine road works are not being done on these routes during the height of the tourism season (if possible); work with NTB, DoT and the private sector to have roadside information “centres” on key tourism routes / junctions with good maps, info on accommodation, fuel, local attractions, opening and closing times of national parks, info on how to drive on gravel roads, warning about wildlife (kudu, warthog) on roads, etc;</li> <li>» Immigrations – have signs welcoming tourists to Namibia at all entry points (airports, road border crossings); have information on accommodation, maps, water quality, road safety, malaria precautions, medical emergencies and other useful aspects;</li> <li>» Municipalities and local authorities – maintain clean, attractive towns; create provision for establishment of safe, well maintained local craft, curio and culture markets, set a high standard of safety and actively discourage beggars, provide good information on local accommodation, services and attractions. These initiatives do not require grandiose, expensive infrastructure, but modest, well-planned, well maintained, clean and well managed infrastructure and services.</li> </ul> </li> </ul>
<p>Key services need to address the issue of hospitality in service delivery, particularly immigrations &amp; customs, police, road check-point officials, NWR, Parks staff, the private sector, etc. local authorities,</p>	<ul style="list-style-type: none"> <li>• NTB and DoT, with input from the private sector, should work with key agencies that interface with the tourism sector (e.g. immigrations, customs, police, people running road control points, etc) to design tourism awareness and tourist sensitive / support training modules to be integrated into the respective agencies’ training programmes. This focused initiative will educate staff on the importance of tourism to Namibia, and the part that they must play to help support this industry.</li> <li>• Agency staff members who have received such training could be issued with a lapel badge that reflects their status as a “tourism-aware officer”.</li> <li>• The tourism sector should continue and expand the current practice of announcing an annual award for best service provided (categories could include lodges, hotels, B&amp;Bs, tour companies, guides, campsites, adventure sports, event organisers, ...)</li> <li>• Agencies in the tourism sector (e.g. DoT, HAN, ...) should announce an annual award for the most visitor-friendly national</li> </ul>

A hot-line should be established for reporting corrupt or rude civil servants and private sector staff.	<ul style="list-style-type: none"> <li>• Establish an SMS service that is well advertised and conspicuous to visitors. This could be similar to the anti-corruption hotline.</li> <li>• All uniformed civil servants and private sector service providers should carry an official nametag pinned to their shirts and visible to the public. This will immediately improve accountability, even if complaints are not submitted.</li> </ul>
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### 7.1.6 Limited understanding of tourism in GRN, particularly at higher levels

Desired outcome: Policy makers and senior civil servants have a good knowledge of the tourism sector and are thereby well placed to create a supportive environment.

Constraint or opportunity	Suggested strategic actions
The value of the tourism sector is poorly understood and largely unappreciated by high-level decision-makers. Conservation and tourism must be given greater priority in national, regional and local level planning and decision-making.	<ul style="list-style-type: none"> <li>• Good, up-to-date and accessible information should be made available on tourism, its contribution to GDP, jobs created, capacity and skills development, contributions relative to other sectors, etc, targeted at decision-makers, service providers and the general public.</li> <li>• Annual statistics from the NTB need to be made available far quicker than is currently the case (they are generally released over a year later).</li> </ul>
Constraint or opportunity	Suggested strategic actions
Many ministries and GRN agencies do not understand their interface with, and role in, tourism	<ul style="list-style-type: none"> <li>• Government and town authorities need to be made aware, through a high-level awareness drive (possibly a 'tourism roadshow'), and informed by timely and accurate reporting in the NTB Annual Reports, that successful tourism is a group effort, requiring input from all sectors of the economy. Irrespective of their specific mandate, all GRN institutions should regard themselves as 'tourism ambassadors'.</li> <li>• Tourists rapidly gain insight into how a country functions (e.g. the efficiency of its services), its social setting and challenges (e.g. crime, housing, street kids, poverty level) and the state of its natural environment (e.g. landscapes, litter, water pollution). All of these aspects of society and environment influence the tourism attractiveness of the country, the rate of repeat visits and its marketability.</li> <li>• MET should be more of a champion for conservation and tourism, at parliament and cabinet level, and they should constantly encourage partner ministries to provide the necessary support to these inter-related sectors. Examples of sector reforms that would benefit the tourism industry are: <ul style="list-style-type: none"> <li>» Work permit restrictions should be lifted for scarce skill categories (e.g. managers)</li> <li>» Tenure on communal land needs to be made more secure and transparent, so as to encourage more and longer-term investment in rural areas;</li> <li>» Rationalise levies and taxes imposed on tourism operations, so as to encourage small operators and community initiatives;</li> <li>» Annual tourism figures (e.g. arrival statistics) should be released more timeously by NTB.</li> <li>» More private sector representation on the NTB board or the suggested Tourism Council would also help to build links with other sectors, such as education (e.g. through the establishment of a school at Sesriem).</li> </ul> </li> </ul>

### 7.1.7 Inadequate strategic planning for priority sectors, one of which is tourism

Desired outcome: Improved strategic planning for tourism eliminates activities in other sectors undermining tourism operations and potential.

Constraint or opportunity	Suggested strategic actions
GRN activities in some sectors currently undermine tourism activities and potential	<ul style="list-style-type: none"> <li>Hub-level planning (see Box below) needs to be undertaken in areas that are experiencing conflicts between sectors. A prime example is the central Namib coast, where conflicts are developing between mining, industrialisation, port and urban expansion, fisheries and tourism. Inadequate efforts are being made to reduce antagonisms and achieve synergies. Other existing and emerging hubs are Windhoek-Okahandja, Rundu-Okavango River area, Kunene-Skeleton Coast, Lüderitz-Oranjemund. Whilst none of these hubs fall within the GSNLA, unresolved sector conflicts in these areas will negatively affect the GSNLA and all other NamPlace landscapes.</li> </ul>

### Information box: Hub-level planning

Policy inconsistencies are sometimes not obvious at national level, but they become much clearer at a local level, especially in areas that are developing rapidly because of multiple-sector growth. Examples of industrial hubs include:

- Windhoek – Okahandja – Rehoboth,
- Central Namib and coastline, and
- North-central Namibia.

In these places, there are many projects being developed at the same time, and often the EIA process reveals conflicts between industrial and environmental objectives (e.g. mining in protected areas).

As part of operationalising NDP4, it is proposed that the National Planning Commission facilitate multi-sector consultations in each major hub. Such hub-level planning would allow key driver sectors, as well as sectors that are growth enablers, to jointly strategise on how to reach overall national goals in their specific geographic area. This proposed approach is an alternative to the current way of planning, where sectors write their own strategies for a national plan and perpetuate the historical problem of ‘silo thinking’.

By working together as multiple sectors at local level, senior officials, parastatals, the private sector and development partners will have to find ways of overcoming conflicts, creating synergies and reducing cumulative impacts of a range of projects. The results of this pilot exercise will provide valuable lessons, and it may be a useful way to approach NDPs in the future.

### 7.1.8 *Insufficient innovation and commitment to security*

Desired outcome: The security of tourists and their support services are ensured by effective, pro-active security arrangements and a high level of efficient policing.

Constraint or opportunity	Suggested strategic actions
There are inadequate effective, innovative and pro-active security arrangements.	<ul style="list-style-type: none"> <li>• Security and police services could monitor road access points (e.g. through CCTV) to core tourism areas, establish a network of “honorary police officers” at tourism sites (e.g. at community camp sites), establish an attractive reward system for info leading to apprehension of perpetrators.</li> <li>• All police points (not just the tourism police in larger centres) should be well prepared to deal with tourists and to quickly and supportively deal with their issues.</li> <li>• Better information should be provided to tourists about keeping themselves and their possessions safe</li> </ul>



## 7.2 Local (landscape) level issues and strategies

### 7.2.1 *Need for diversification*

Desired outcome: Landscapes offer more attractions and access areas (where this is appropriate based on sensitivity) and offer a greater diversity of activities

Constraint or opportunity	Suggested strategic actions
Virtually all activity is focused on the Sossusvlei area in the GSNLA, causing traffic bottlenecks and concentrating negative environmental impacts.	<ul style="list-style-type: none"> <li>• Additional access points to the Sand Sea need to be opened up, but avoiding highly sensitive areas such as Tsondabvlei which is an area of Special Scientific Interest. Both exclusive access (e.g. via concessions) and more general public access should be established.</li> <li>• More types of activities need to be offered in landscapes, such as mountain biking, hiking trails, 4x4 trails of varying lengths with dry camps (guided &amp; self-drive as appropriate), tethered balloons, specialist guiding (geology, botany, birding), etc.</li> <li>• Explore the idea of developing an “activities centre” in each landscape, drawing guests from all the tourism establishments in the landscape</li> </ul>

### 7.2.2 *Need for improved efficiency in service delivery*

Desired outcome: modernized and innovative services are provided at landscape level

Constraint or opportunity	Suggested strategic actions
Inadequate infrastructure and management systems are causing bottlenecks at the Sesriem gate.	<ul style="list-style-type: none"> <li>• Entry, exit and payment procedures to parks and their key attractions need to be streamlined so there is no waiting time (as opposed to just a reduction in waiting time). This could involve an automated card issuing and machine payment system as in airports.</li> </ul>
Transport options from Sesriem to Sossusvlei are limited to vehicles only, creating dust, noise and other impacts. The main problem in this primary tourism attraction is too many cars at peak times (not too many people).	<ul style="list-style-type: none"> <li>• An environmentally friendly and efficient transport system should be established from the park gate to the attraction. This could be a circular set of rails and solar trains and carriages, moving guests via a set of attractions. Guests would get on and off at stopping points as they pleased. The service could run at 10 min intervals during peak times. This would also allow the transport to leave well before sunrise and return well after sunset. Such infrastructure could be funded under climate change offsets.</li> </ul>
Public facilities and services at primary tourist attractions are inadequate.	<ul style="list-style-type: none"> <li>• Clean and well maintained toilet facilities are needed.</li> <li>• Refreshments should be available at key sites such as at Sossusvlei.</li> </ul>

### 7.2.3 Need to provide good information

Desired outcome: outstanding quality information is provided at key attractions in the landscape

Constraint or opportunity	Suggested strategic actions
Currently there is very little information available to visitors to Sossusvlei. The area offers great potential to have highly innovative, informative and interactive information centres and facilities.	<ul style="list-style-type: none"> <li>Given the high numbers of guests, and the awareness and education potential of the area, provision of top-quality, accessible information should be an absolute priority. The design of such information centres / facilities should be done collaboratively (MET and private sector)</li> <li>Could provide live cam feeds from interest points in the landscape (e.g. water points) to (a) info centres, (b) landscape websites, (c) NBC, etc to capture people's imagination &amp; interest.</li> </ul>

### 7.2.4 Need to provide focused marketing of landscapes

Desired outcome: Landscapes become well-known as attractive destinations offering diverse activities and excellent services.

Constraint or opportunity	Suggested strategic actions
Marketing of the landscape and its primary attractions is inadequate.	<ul style="list-style-type: none"> <li>Landscape marketing should be integrated into the NTB marketing strategy.</li> <li>The World Heritage status of the Namib Sand Sea should be used to boost tourism in this area.</li> <li>All establishments within the GSNLA should also promote the GSNLA as part of their marketing.</li> <li>Marketing should focus on the most prominent features within the GSNLA, its achievements and good-news success stories, e.g. co-management, the fence-free initiative, wildlife re-introductions, new tourism products and packages, use of green technology, recycling, infrastructure upgrades,</li> </ul>

### 7.2.5 Improved environmental management

Desired outcome: A high standard of environmental management is achieved & maintained across the landscape and is used for marketing.

Constraint or opportunity	Suggested strategic actions
Tourism establishments operate to variable standards with regards to environmental management. For the GSNLA to acquire a good eco-reputation, environmental management needs to be consistently good.	<ul style="list-style-type: none"> <li>Waste management procedures are established in each landscape linked to the 3R "reduce, re-use &amp; recycle" philosophy, with one or more well managed landscape waste storage depots.</li> <li>All establishments in the landscape participate in the eco awards Namibia programme and work towards achieving at least 3 flowers.</li> </ul>
Zone and manage the landscape, based on environmental sensitivity, economic opportunities and land-use practices.	<ul style="list-style-type: none"> <li>The landscape should continue to be opened up with removal / breaching of fences between areas with compatible land uses. Particular attention needs to focus on national park – neighbour fences</li> </ul>

### 7.2.6 *Inadequate infrastructure and related services*

Desired outcome: Roads and communications – particularly internet – are of high quality.

Constraint or opportunity	Suggested strategic actions
See National Level	

### 7.2.6 *Insufficient innovation and commitment to security*

Desired outcome: the security of tourists and their support services are ensured by effective, pro-active security arrangements and a high level of efficient policing.

Constraint or opportunity	Suggested strategic actions
See National Level	

## CHAPTER 8

## CONCLUSION

There are some likely negative impacts on the Greater Sossusvlei-Namib Landscape Area, arising from growth of the tourism industry. For instance, sensitive species such as lappet-faced vulture could continue to decline; groundwater abstraction for thirsty lodges might be excessive; and damage or vandalism of rock art and cultural features could become problematic.

Issues such as these can, for the most part, be reduced or avoided through improved management, such as stricter controls on scenic flights, and stronger monitoring of groundwater levels and enforcement of waste-water treatment. The fact that problems exist currently shows that management is ineffective, which points to much deeper problems of lack of capacity and lack of interest in fixing or preventing problems.

Solutions are easy to suggest but difficult to implement. The co-management approach that the NamPlace project is promoting holds the potential to bring private sector support to Government ministries and Local Authorities, to achieve greater overall benefits from the tourism industry and to reduce the negative impacts that can jeopardise its growth.

To conclude, there is great scope for achieving growth and expansion in the tourism sector in the Greater Sossusvlei-Namib landscape. The area is highly suited to this land use, and small strategic investments can bring major spinoffs to the local and national economy. Co-management is a useful and a necessary vehicle to help this growth.

## CHAPTER 9

## REFERENCES

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Seely, M. 2012. Namib Sand Sea World Heritage Nomination. Namibia National Commission for World Heritage, Windhoek.

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## Appendix A: Terms of Reference

### 6. Key areas of the SEA identified

The Terms of Reference was developed with the inputs from the GSNL committee members with the first consultative meeting taking place on the 27<sup>th</sup> October 2012. Further inputs were provided by the members of the landscape. Through desktop review of the existing relevant documents to the landscape and consultation with the members, key areas and key considerations specific to the GSNL were identified as follows:

- Building on the foundation of and strengthening existing partnerships (in terms of recommendations) for improved landscape management for conservation and socio-economic development
- Threshold levels in terms of tourism potential, such as impacts of tourism number in terms of rapidly growing tourism in the landscape
- Infrastructure components and activities, such as road use and conditions, road accidents (inexperienced drivers) in the landscape
- Management and capacity in terms of skills (e.g. employment requirements) needs to be reviewed
- An immense amount of background information exists (e.g. waste management and mining issues in draft co-management plan, baseline survey on land ownership and use in the area, assessment of all lodges by EcoAwards (as a possible tool towards the SEA), IUCN Evaluation of the potential World Heritage Site), important to collect all and review in-depth to avoid unnecessary duplication of effort
- Review Concession application process
- Include socio-economic indicators, such as the performance of the area, transitions from farming to tourism, associated tax implications
- Management of the resources that tourism is dependent on, e.g. energy, water, capacity
- Detailed mapping has been conducted for the landscape and includes baseline maps, biomes, vegetation, infrastructure, concessions (e.g. mining and tourism), geo-referenced land used, wildlife populations (occurrence and densities)
- The potential World Heritage Site in the landscape, which will be announced/confirmed in July 2013

The consulting firm should note that the assessment should not only be limited to the above key issues and areas identified, it is recommended that the consulting firm should consider others critical issues to the tourism sector. These issues should be presented to the GSNL committee as part of the inception report and form the basis of a discussion to ensure that all the key issues are covered by the SEA.



## Appendix B: List of stakeholders

### Primary stakeholders

Name	Farm / Organisation	Capacity / Role	Tel / Cell	Email
Malco Klein	Blasskranz	Owner, Naukluft area	0812216679	
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Name	Farm / Organisation	Capacity / Role	Tel / Cell	Email
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### *Secondary stakeholders*

Name	Farm / Organisation	Capacity / Role	Tel / Cell	Email
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*Tertiary stakeholders*

Name	Farm / Organisation	Capacity / Role	Tel / Cell	Email
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## Appendix C: Tourism establishments in the GSNLA

*Up market = N\$900 pp/pn and above*

*Mid market = N\$400 pp/pn to N\$899 pp/pn*

*Low market = (all camping!) and accommodation N\$399 pp/pn or lower*

*(the above categorization is based on conversations with outbound travel agencies and domestic tour operators)*

Name	Market level	Accommodation offered	Activities offered
Solitaire Guest Farm	Mid market	32 beds	
3 campsites	Cheetah drive, night drive		
Ababis Guest Farm	Mid market	16 beds	
3 campsites	Excellent views, hiking, swimming pool		
Namib Naukluft Campsite	Low market	10 campsites	Hiking trails
Namib Naukluft Lodge	Up-market	42 beds	Sossusvlei excursions, sunset and desert drives, hiking trails, swimming pool, golf course
The Soft Adventure Camp	Mid market	30 beds	Sossusvlei excursions, sunset and desert drives, hiking trails, swimming pool, golf course
Namib Desert Lodge	Up-market	130 beds	Evening sundowner dune trip, 2-hr dune hiking trip
Weltevrede Guest Farm	Mid market	24 beds 3 campsites	Hiking, excellent views (photography), scenic drive, viewing of rock art, ballooning, scenic flights, scenic drive, quad-biking (outsourced, extra cost, prices unavailable) cattle on the land; a working cattle farm
Camp Agama	Mid market	22 beds 9 camp sites	Swimming pool, sun-downers
Sossus Dune Lodge	Up-market	50 beds	Sundowners, guided walks, night walk and stargazing.
Swimming pool			
Sossusvlei Lodge	Up-market	90 beds	Excursions to dunes, excursion to Sesreim canyon w/ sundowner, quad-biking, archery, stargazing, scenic flight
Sesreim Campsite	Low market	24 campsites	
Desert Camp	Up-market	40 beds	Swimming pool, walking trail
Kulala Desert Lodge	Up-market	46 beds	Swimming pool, wildlife viewing, nature drives, nature walks, Ballooning, quad-biking
Little Kulala	Up-market	22 beds	Nature drives, walking trails, balloon safaris and horseback riding, scorpion walks, star gazing

Name	Market level	Accommodation offered	Activities offered
Sossusvlei Wilderness Camp	Up-market	23 beds	
Desert Homestead and Horsetrail	Up-market	40 beds	Horse rides, sundowner, champagne breakfast, Sossusvlei excursion
A Little Sossus Lodge	Up-market	46 beds	Guided tours, scenic drives
Blasskranz Guest Farm			
Bullsport Guestfarm	Up-market	28 beds	horse trails, horse riding lessons, hiking, swimming pool, Naukluft Plateau & Quivertree Valley Hike, Scenic Farm & Game Drive, Sossusvlei excursion
Neuras Winery & Guest Farm	Up-market	8 beds	Wine tasting, hiking, birding, photography. A working farm
Tsachab River Camp	mid market	10 beds	
Zebra River Lodge	Up-market	26 beds	birding, photography, hiking, nature tour, guided walk, walk to hot springs,
Hammerstein Lodge	Mid market	50 rooms 3 campsites	Nature drive, wildcat tour
Wolwedans Dunes Camp	Up-market	18 beds	photography, sundowners
NamibRand Family Hideout	Up-market	10 beds 1 campsite	Duneboarding, 4x4 drive/ scenic drive, wildlife viewing, photography sundowner
Tolou's Lodge		30 beds	Scenic drives, hiking
Nubib Nature Camp	Low market		
Duwisib Castle		B&B 8 campsites	Birding, national monument
Betta Camping Site	Low market	16 beds 10 camp sites	
Boulder's Safari Camp (Wolwedans)	Up-market	8 beds	scenic drives, hiking
Rostock Ritz Desert Lodge	Up-market	22 beds 4 campsites	Scenic drives, swimming pool, viewing of bushman paintings
Drifters Desert Lodge	Mid market	12 beds	Game viewing, game walks, sundowners, photography, swimming pool.







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